



Farmers Markets Data Report

Lewis County, WA: 2016-2020

Prepared by: Colleen Donovan and Melissa Balding, WSFMA

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For more information: 206-706-5198 or info@wafarmersmarkets.org.

SUMMARY

There are currently six farmers markets operating in Lewis County: four that are incorporated and two more informal farmers markets.

All Lewis County farmers markets are considered “small” or “very small” as measured by the average number of vendors during peak season. (Being a small or very small farmers markets over time is a risk factor as earned income from vendor fees is usually insufficient for operations¹.)

The four core farmers markets are incorporated as nonprofit organizations and led by volunteer boards. Currently, about half of the market managers are paid and half are unpaid or volunteers. While turnover of leadership is a chronic issue for all farmers markets, those in Lewis County appear to have strong continuity in their vendor mix and board members. However, turnover appears to be higher in terms of on-site market management.

The four established farmers markets in Lewis County are members of the Washington State Farmers Market Association. Farmers market data report to the WSFMA through an annual application process. All aggregated data in this report is provided by the WSFMA unless otherwise noted. Farmers market data is generally collected by the farmers market staff or volunteers. Data is considered both reliable and valid for an individual farmers market. However, data between farmer markets and from year to year can be far less reliable given the range of methodologies, training available, and time needed to collect, clean and report data. It is a challenge for farmers market data achieve and maintain precision, especially with regards to reported sales and shopper counts.

¹ OSU Special Report 1073-E, 2018 (revised), “When things don’t work: Some Insights as to why Farmers Markets Close.”

The Impact of the Coronavirus Pandemic at Lewis County Farmers Markets: 2020

As COVID-19 emerged in Washington State in March 2020, farmers markets around the state began to adapt. In mid-April 2020, the Washington State Department of Health issued its first Farmers Market Guidelines. Fortunately, farmers markets were able to operate as essential services. This required adding new signage, PPE, sanitation, initially limiting vendor to essential businesses only (primarily farmers), encouraging shoppers to reduce the amount of time they spent in the market, eliminating entertainment and educational activities, and practicing social distancing. A report on the statewide impacts, “Washington Farmers Markets Data Snapshot – 2020,” is available on the WSFMA website.

In Lewis County, farmers market changes between 2019 and 2020 include:

- The number of total market days that farmers markets operated increased 26%, from 90 to 113.
- Per public health restrictions, the aggregated total number of vendors and average per farmers market decreased 27%, from 99 to 72. Note: this is not the number of unique vendors. It is the number of direct sales opportunities created by farmers markets for vendors.
- As farmers were essential services, the aggregated total number of farm vendors and average farm vendors per farmers market decreased less or 18%, from 49 to 40.
- The aggregated total sales for all vendors increased 20%, from \$211,905 to \$255,262. This is impressive given the decrease in vendors and statewide trends.
- The aggregated total sales for all farm vendors also increased 108%, from \$41,764 to \$86,818. Again, this is impressive given the decrease in vendors and statewide trends.
- Three of the four farmers markets offered online ordering in 2020.
- The percentage of total farmers market sales coming from farm vendors increased 9%, from 57% to 62%.
- Echoing state trends, the redemption rates of the WIC and Senior Farmers Market Nutrition Program decreased 34%, from \$16,808 to \$11,040. The annual decrease was greater for WIC FMNP (43%) than for Senior FMNP (-27%).
- FMNP sales redeemed by Lewis County growers that are authorized to accept FMNP also decreased 33%, from \$10,440 to \$7,020.
- Not surprisingly due to the pandemic, the average estimated total number of shopper visits per farmers market decreased 17%, from 3,767 to 3,113. **LEWIS COUNTY FARMERS MARKETS**

LEWIS COUNTY FARMERS MARKETS

Farmers markets that are members of the Washington State Farmers Market Association that are incorporated as nonprofit organizations, operating under Washington State and County regulations, and the WSFMA Roots Guidelines. There are four farmers markets that are members of the WSFMA and are represented in this report. Two additional farmers markets were identified however, they are not formally incorporated and unable to provide data for this report.

Two farmers markets were started in 2017 and two are significantly older (2005 and 1979). The Centralia Farmers Market is one of the very earliest members of the WSFMA and was one of 18 farmers markets listed on the first statewide directory in 1985. Each farmers market location is counted as a farmers market.

Through 2018, the Chehalis Farmers Market operated two days a week; this still counts as one farmers market as it was at the same location.

The era in which a farmers market was founded correlates to its original mission and governance structures. Older markets tend to prioritize providing alternative, direct markets to local farmers and include or even restrict leadership roles to vendors. More contemporary farmers markets tend to include community building, supporting the local economy, and food access programs as part of their mission. They also tend to rely more on community members for leadership.

The Lewis County farmers markets currently operate on four different days of the week: Tuesday, Thursday, Friday, and Saturdays. Having farmers markets on various days of the week provides more options for shoppers and vendors; in rural areas competition for shoppers and vendors can increase when local markets are on the same day.

Table 1. Lewis County Farmers Market Organizations in 2021

Year Started	Farmers Market	Farmers Market Organization	Incorporation	Market Day	Season
1979	Centralia Farmer's Market*	Lewis County Farmers Markets (1994)	WA State Nonprofit	Friday	Apr.-Sept.
2005	Community Farmers Market at Chehalis*	Greater Lewis County Farmer's Market Association (2005)	501c3	Tuesday [^]	June-Oct.
2017	Morton Farmers Market*	Friends of the Morton Parks	501c3	Saturday	Apr.-Oct.
2015	Packwood Farmers Market	grassroots group	<i>Unincorporated</i>	Saturday	June-Oct.
?	Pe Ell Farmers Markets	?	<i>Unincorporated</i>	Saturday	May-Oct.
2017	Toledo Thursday Market*	Toledo Lions Club	501c3	Thursday	Feb.-Dec. ⁺

* indicates that farmers market is a member of the Washington State Farmers Market Association in 2021.

? indicates that information was unable to be confirmed.

[^] The Chehalis Farmers Market operated two days a week (Tuesday and Friday) through the 2018 season.

⁺ The Toledo Farmers Market extended its 2019 season. Instead of ending in September, it continued through December. In 2020, the market started operating from February to December, operating indoors December to April and outdoors May to November.

The total number of days per season that a farmers market is open is important to track as it indicates how often vendors can sell and shoppers can shop. The number of markets also can change significantly from year to year, greatly impacting the overall data for the season. Therefore, the number of markets days also serves as an important metric for creating averages per market day that can be better used for annual comparison.

Table 2. Aggregate Number of Farmers Market Days by Year in Lewis County, WA

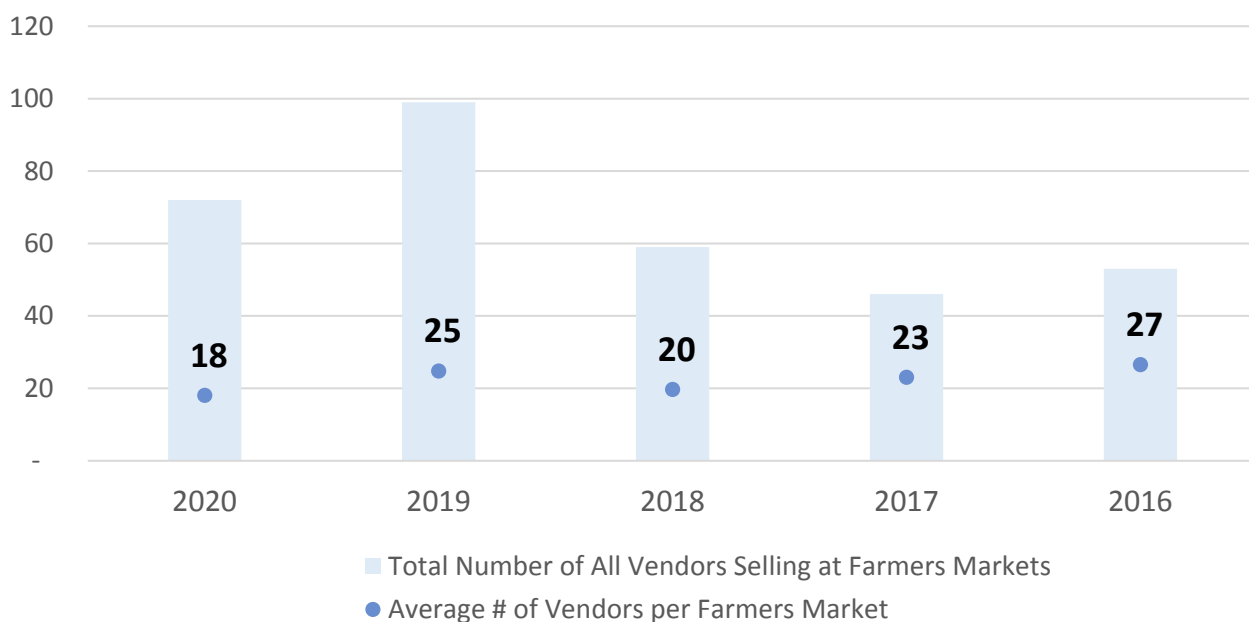
Lewis County Farmers Markets	2020	2019	2018	2017	2016
Aggregated Number of Market Days	113	90	89	49	43
Average Number of Market Days per Farmers Market	28	23	30	25	22
Number of Farmers Markets	4	4	3	2	2

From 2016 to 2020, the aggregate number of days that farmers markets were open in Lewis County has increase from 43 to 113, an increase of over 160%. Of note, the Toledo Farmers Market began operating year-round in 2020 after successfully extending their season in 2019. This also coincided with a growth of online, preordering at multiple farmers markets using Local Line due to COVID-19. The average number of markets days per farmers market has been relatively steady with a peak in 2018.

FARMERS MARKET VENDORS

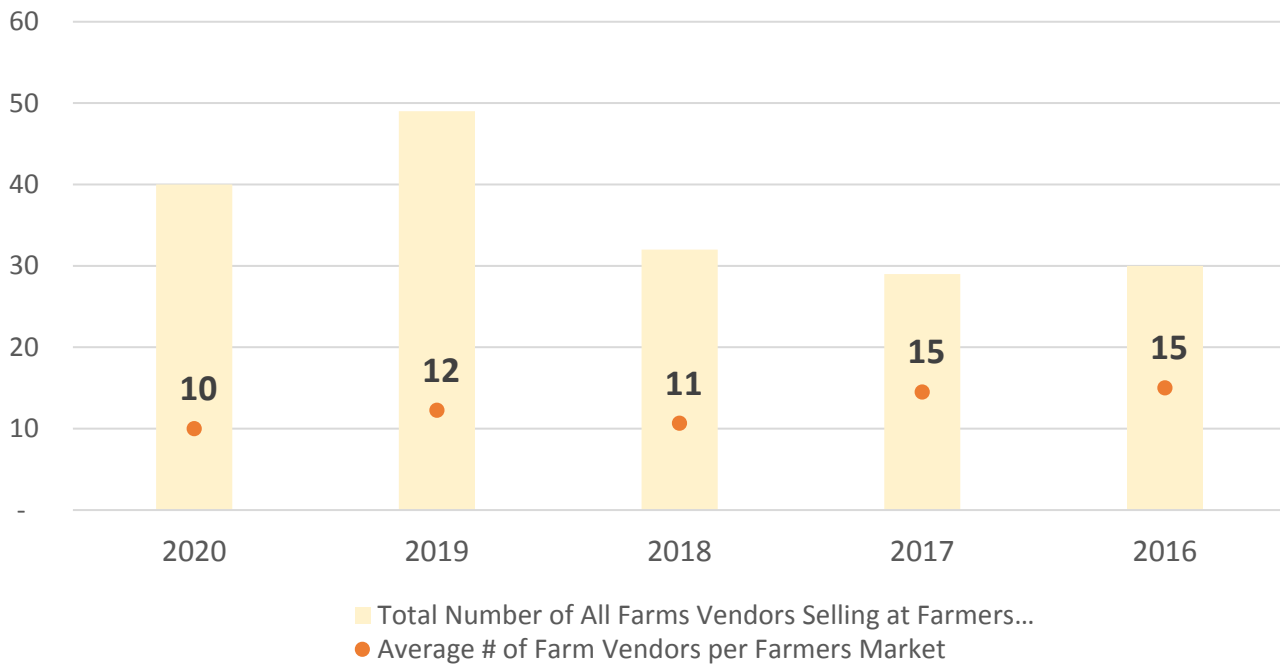
There are five major vendor categories: farm vendors, processed food vendors, resellers (if allowed), artisans (if allowed), and prepared food vendors. The total number of all vendor categories does not represent unique vendors. Nevertheless, the total number of all vendors is an important metric as it shows the number of direct sales outlets created by farmers market. In Lewis County, the average number of vendors per farmers market decreased between 2016 and 2018, grew in 2019 and then declined in 2020 following statewide trends (due to COVID-19).

Total Number of All Vendors Selling at Farmers Markets, Lewis County, WA: 2016-2020



The total number of farm vendors selling at a farmers market reflects the direct sales opportunities for farmers. Farmers markets are designed to privilege farm vendors and farmers markets rely on farmers to grow their product mix. This metric puts the “farmers” in farmers market. While total number of reported farm vendors selling at farmers markets in Lewis County has increased, from 30 in 2016 to a high of 49 in 2019, the average number of farm vendors per farmers market has been declining since 2017. This trend merits additional inquiry as to some of the primary causes for this decline and strategies to grow the aggregated number of farm vendors at Lewis County farmers markets.

Total Number of All Farm Vendors Selling at Farmers Markets, Lewis County, WA: 2016-2020



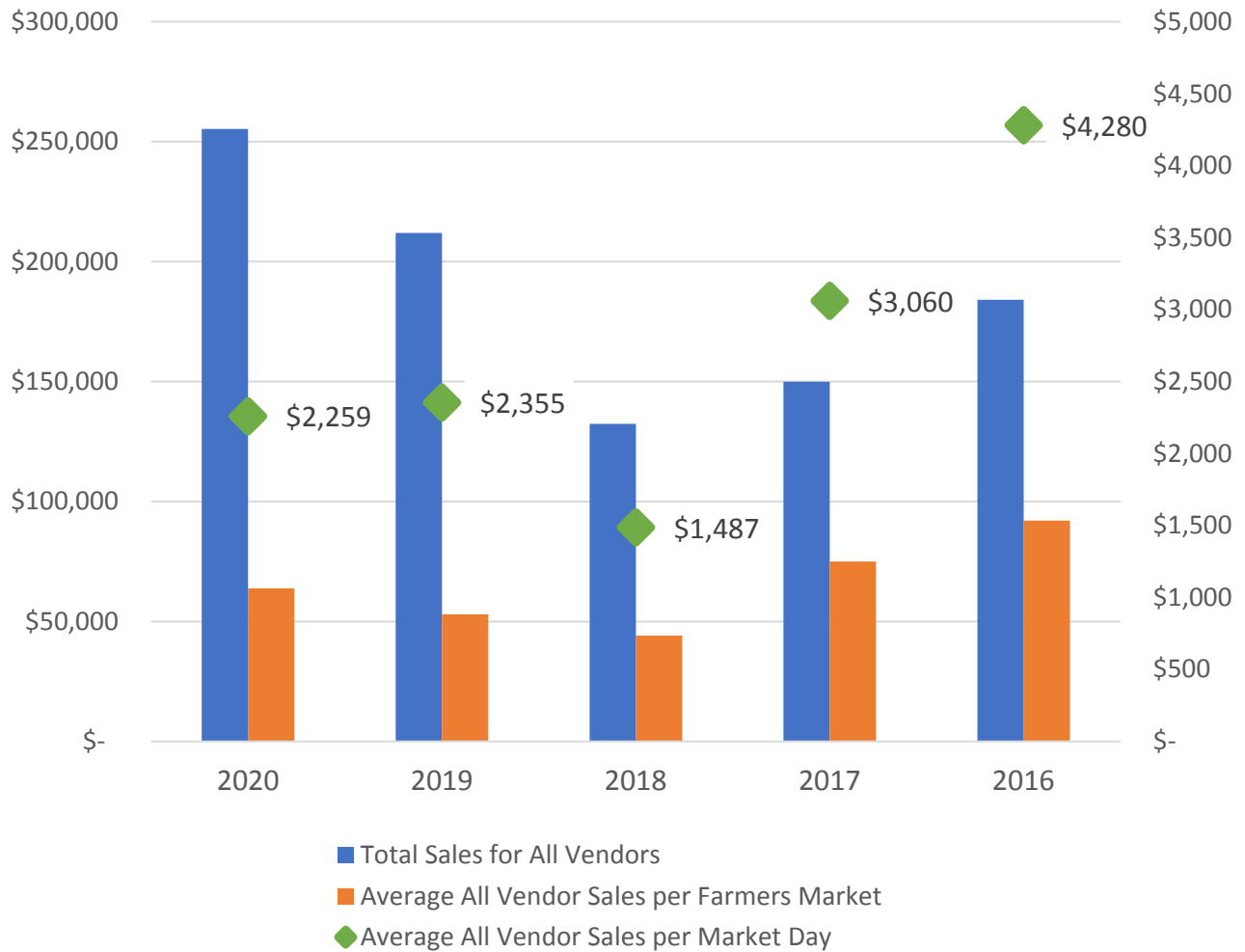
FARMERS MARKET SALES

The Aggregated Vendor Sales represents the annual reported sales for all vendor categories for all farmers markets. Total Vendor Sales at farmers markets in Lewis County have grown to over \$255,000 in 2020. The average Total Vendor Sales per farmers markets was highest in 2019 at over \$90,000 and has been growing since 2018. This trend is mirrored by the average Total Vendor Sales per Market Day, with the highest amount in 2012 and steady growth since 2018.

Table 3. Aggregated Vendor Sales by Year

Lewis County Farmers Markets	2020	2019	2018	2017	2016
Total Reported Farmers Market Sales for All Vendors	\$255,262	\$ 211,905	\$ 132,352	\$ 149,943	\$ 184,048
Average of All Vendor Sales per Farmers Market	\$ 63,815	\$ 52,976	\$ 44,117	\$ 74,972	\$ 92,024
Average of All Vendor Sales per Market Day	\$ 2,259	\$2,355	\$ 1,487	\$ 3,060	\$ 4,280
# FMs reporting	4	4	3	2	2

Total Farmers Market Sales for All Vendors, Lewis County, WA: 2016-2020

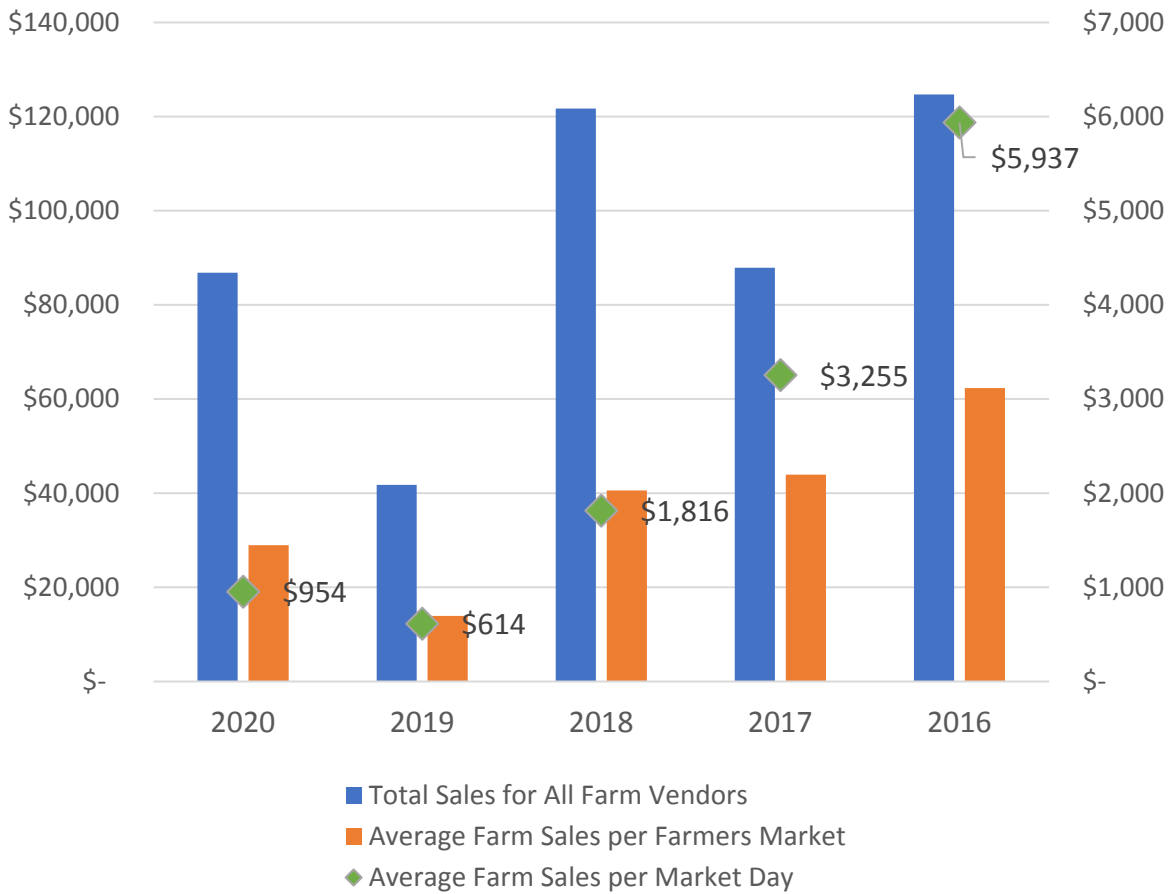


The Aggregated Farm Vendor Sales represents the annual reported sales for farm vendors for all farmers markets. In the five-year period reviewed, Total Farm Vendor Sales at farmers markets in Lewis County was highest in 2016 at almost \$125,000. The highest average Total Farm Vendor Sales per farmers markets average Total Farm Vendor Sales per Market Day was also in 2016 despite having fewer farmers markets reporting sales. This suggests that the additional farmers markets have been smaller markets.

Table 4. Aggregated Farm Vendor Sales by Year

Lewis County Farmers Markets	2020	2019	2018	2017	2016
Total Sales for All Farm Vendors	\$ 86,818	\$ 41,764	\$ 121,691	\$ 87,880	\$ 124,685
Average Farm Sales per Farmers Market	\$ 28,939	\$ 13,921	\$ 40,564	\$ 43,940	\$ 62,343
Average Farm Sales per Market Day	\$ 954	\$ 614	\$ 1,816	\$ 3,255	\$ 5,937
# FMs reporting	3	3	3	2	2

Total Farmers Market Sales for All Farm Vendors, Lewis County, WA: 2016-2020



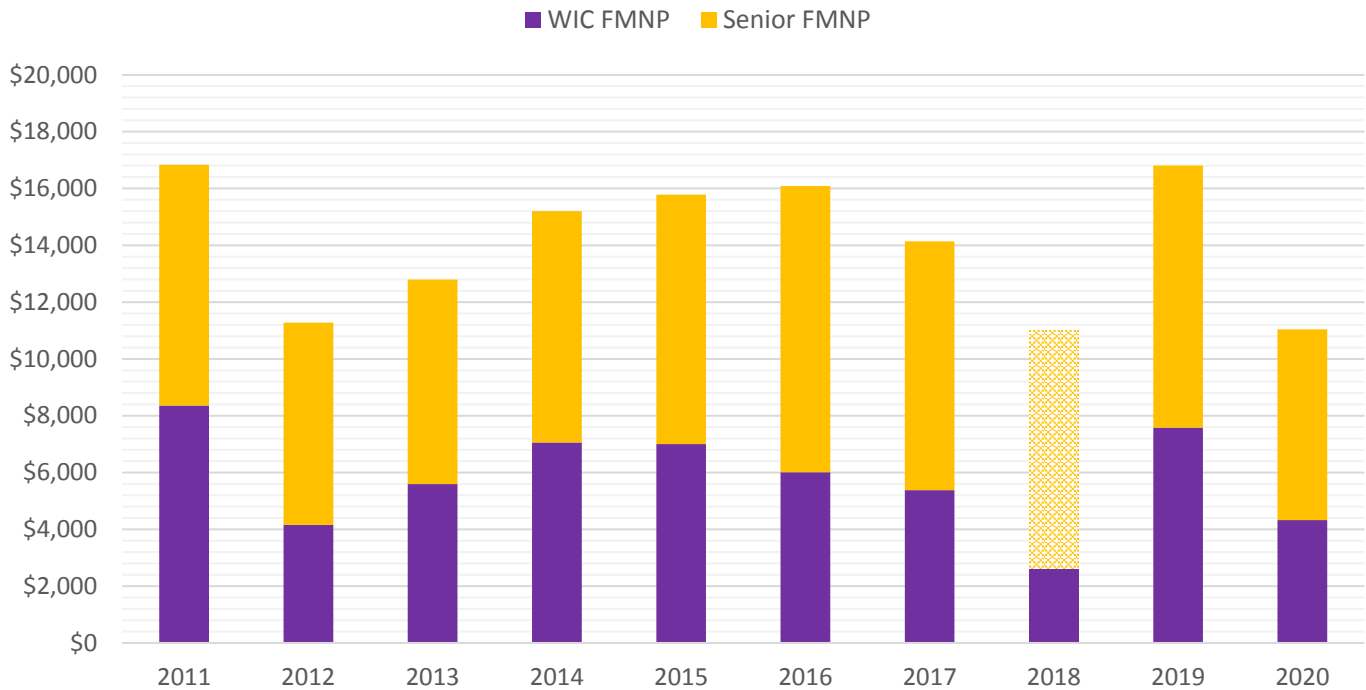
FOOD ACCESS PROGRAMS

Four farmers markets currently participate in the WIC and Senior Farmers Market Nutrition Program, accepted SNAP and participate in the SNAP Market Match incentive program.

Table 5. Payments Accepted at Lewis County Farmers Markets in 2021

Farmers Market	Online Preorders	Credit/Debit	FMNP	SNAP EBT	SNAP Market Match	Other
Centralia Farmer's Market	Local Line?	Yes	Yes	Yes	Yes	Kids Club
Community Farmers Market at Chehalis	Local Line	Yes	Yes	Yes	Yes	--
Morton Farmers Market	--	Yes	Yes	Yes	Yes	Kids Club
Toledo Thursday Market	Local Line	Yes	Yes	Yes	Yes	Kids Club

Farmers Market Nutrition Program Redemptions: Lewis County



Source: WS Dept of Health, Redemption by County

Note: The Senior FMNP data for 2018 was unavailable; data shown is an average of the Senior FMNP data for 2017 and 2019.

Table 6. WIC & Senior FMNP Redemptions in Lewis County by Year

Lewis County Farmers Markets	2020	2019	2018	2017	2016
Farmers Market Nutrition Program WIC & Senior Redemptions for All FMs	\$ 11,040	\$ 16,808	\$10,995	\$14,136	\$16,088
Average FMNP per Farmers Market	\$ 2,760	\$ 4,202	\$ 5,498	\$ 4,712	\$ 8,044
FMNP WIC	\$ 4,324	\$ 7,580	\$ 2,628	\$ 5,380	\$ 6,008
FMNP Senior	\$ 6,716	\$ 9,228	\$ 8,367	\$ 8,756	\$10,080
# FMs authorized	4	4	2	3	2

Source: WS Dept of Health, Redemption by County

Italics indicate an estimate.

According to data provided by the Washington State Department of Health, there were 335 SNAP transactions at two Lewis County farmers markets in 2020². This resulted in \$5,378 in SNAP Market Match being distributed and \$4,408 or 82% being redeemed that year. SNAP data is not available by farmers market but it is safe to assume that the two farmers markets has at least \$5,378 in SNAP sales in 2020. Together with the FMNP sales, food access programs accounted for at least \$20,826 or 8% of the total reported sales for Lewis County farmers markets in 2020.

² One farmers market's EBT machine wasn't working in 2020 and another didn't start participating until 2021.

Total Number of Farmers Market Shopper Visits for Season, Lewis County, WA: 2020-2016



* Not unique

The reported shopper counts for a season are not precise but may indicate overall trends, especially if tracked throughout the season using the same methodology. The shopper counts estimate the number of shopper visits, not the number of unique shoppers. This metric is important to track in relations to sales and understanding the trends in per sales per shopper visit at a farmers market. The average estimated total annual shopper visits per farmers market dropped between 2016 and 2018, keeping in mind that Chehalis Farmers Market operated two days a week at that time. The average decreased 17% between 2019 and 2020; however, the COVID-19 pandemic restricted shoppers in 2020. And, most impressively, sales increased in this period which suggests higher spending per shopper visit which is a very positive trend.

Table 7. Estimated Shoppers for All Lewis County Farmers Markets by Year

Lewis County Farmers Markets	2020	2019	2018	2017	2016
Total Number of Shopper Visits for Season	12,450	11,300	5,500	8,000	13,800
Average # of Annual Shopper Visits per Farmers Market*	3,113	3,767	2,750	4,000	6,900
# FMs reporting	4	3	2	2	2

* Not unique

WASHINGTON STATE FARMERS MARKET ASSOCIATION
FARMERS MARKET DATA REPORT: LEWIS COUNTY

Farmers Market Metrics	Lewis County				2018	2017	2016
	2020	2019	Difference	% change			
Number of Farmers Markets Open	5	5	0	0%	5	5	3
Number of Farmers Markets Reporting	4	4	0	0%	3	2	2
% FMs reporting	80%	80%	0	0%	60%	40%	67%
Aggregated Number of Market Days	113	90	23	26%	89	49	43
# of Year-Round FMs (>40 weeks/year)	1	0	1		0	0	
Average # of Market Days	28	23	6	26%	30	25	22
# FMs reporting	4	4	0	0%	3	2	2
Total Number of All Vendors Selling at Farmers Markets*	72	99	(27)	-27%	59	46	53
Average # of Vendors per Farmers Market	18	25	(7)	-27%	20	23	27
# FMs reporting	4	4	-	0%	3	2	2
Total Number of All Farm Vendors Selling at Farmers Markets*	40	49	(9)	-18%	32	29	30
Average # of Farm Vendors per Farmers Market	10	12	(2)	-18%	11	15	15
# FMs reporting	4	4	-	0%	3	2	2
Total Sales for All Vendors	\$ 255,262	\$ 211,905	\$ 43,357	20%	\$ 132,352	\$ 149,943	\$ 184,048
Average All Vendor Sales per Farmers Market	\$ 63,815	\$ 52,976	\$ 10,839	20%	\$ 44,117	\$ 74,972	\$ 92,024
Average All Vendor Sales per Market Day	\$ 2,259	\$ 2,355	\$ (96)	-4%	\$ 1,487	\$ 3,060	\$ 4,280
# FMs reporting	4	4	0	0%	3	2	2
Total Sales for All Farm Vendors	\$ 86,818	\$ 41,764	\$ 45,054	108%	\$ 121,691	\$ 87,880	\$ 124,685
Average Farm Sales per Farmers Market	\$ 28,939	\$ 13,921	\$ 15,018	108%	\$ 40,564	\$ 43,940	\$ 62,343
Average Farm Sales per Market Day	\$ 954	\$ 614	\$ 340	55%	\$ 1,816	\$ 3,255	\$ 5,937
# FMs reporting	3	3	0	0%	3	2	2
% of All Vendor Sales from All Farm Vendors	62%	57%	5%	9%	92%	59%	68%

WASHINGTON STATE FARMERS MARKET ASSOCIATION
FARMERS MARKET DATA REPORT: LEWIS COUNTY

Farmers Market Metrics	Lewis County				2018	2017	2016
	2020	2019	Difference	% change			
Farmers Market Nutrition Program: WIC & Senior Lewis County Farmers Markets Source: WS Dept of Health, Redemption by County	\$ 11,040	\$ 16,808	\$ (5,768)	-34%	\$ 10,995	\$ 14,136	\$ 16,088
Average FMNP per Farmers Market	\$ 2,760	\$ 4,202	\$ (1,442)	-34%	\$ 5,498	\$ 4,712	\$ 8,044
FMNP WIC	\$ 4,324	\$ 7,580	\$ (3,256)	-43%	\$ 2,628	\$ 5,380	\$ 6,008
FMNP Senior	\$ 6,716	\$ 9,228	\$ (2,512)	-27%	\$ 8,367	\$ 8,756	\$ 10,080
# FMs authorized	4	4	0	0%	2	3	2
Farmers Market Nutrition Program: WIC & Senior Lewis County Growers Source: WS Dept of Health, Grower Redemption Report by County	\$ 7,020	\$ 10,440	\$ (3,420)	-33%			
FMNP WIC	\$ 3,208	\$ 4,808	\$ (1,600)	-33%			
FMNP Senior	\$ 3,812	\$ 5,632	\$ (1,820)	-32%			
Total number of pounds of food donated by farmers market and vendors	900	900	-	0%	100	200	missing
# FMs reporting >0#	1	1	0	0%	1	1	
Total Number of Shopper Visits for Season	12,450	11,300	1,150	10%	5500	8000	13800
Average # of Annual Shopper Visits per per Farmers Market*	3,113	3,767	(654)	-17%	2,750	4,000	6,900
# FMs reporting	4	3	1	33%	2	2	2
% of Market Managers that were Paid (not volunteer)	50	50	-	0%	missing	100	missing
# FMs reporting	4	4	-	0%		2	
Aggregated Number of Farmers Market Volunteers	27	26	1	4%	19	4	missing
Average # of Volunteers per Farmers Market	7	7	0	4%	6	2	
# FMs reporting	4	4	-	0%	3	2	
* Not unique							
<i>italics = estimate</i>							