

The State of the Food System

Rogue Valley Community Food Assessment

Executive Summary 2025

The 2025 Rogue Valley Community Food Assessment (RVCFA) is the result of three years of research into the current state of our food system in Jackson and Josephine Counties. Developed and led by the Rogue Valley Food System Network, the RVCFA tells a story that many who live in the area already know – the Rogue Valley is a region of great abundance. Rolling hills and majestic mountains, wild rivers, salmon runs, oak woodlands and pine forests, the natural abundance of the Rogue Valley has supported the Takelma, Shasta, Dakubetede, Tolowa Dee-ni' and other peoples for thousands of years. In more modern times, the Rogue Valley has gained national recognition for its pear orchards, vineyards, cheeses and herbs, just to name a few of the delicious local products. In total, Rogue Valley producers generated more than \$142 million in agricultural sales in 2022. When combined with the income generated by distributors, restaurants, institutions, retail outlets, tourism and even the composting of food, it becomes clear that the food system in the Rogue Valley is a core economic driver. The question then becomes: how do local communities retain as many of the dollars and resources as possible generated and utilized by the food system within the Rogue Valley?

This is vital because amidst the abundance and bounty, the RVCFA also reveals startling statistics:

- 17% and 19% of the children in Jackson and Josephine Counties, respectively, suffer from food insecurity.
- More than 70% of the food from stores, restaurants, institutions and homes is wasted
- Only 2% of the food grown locally is purchased locally

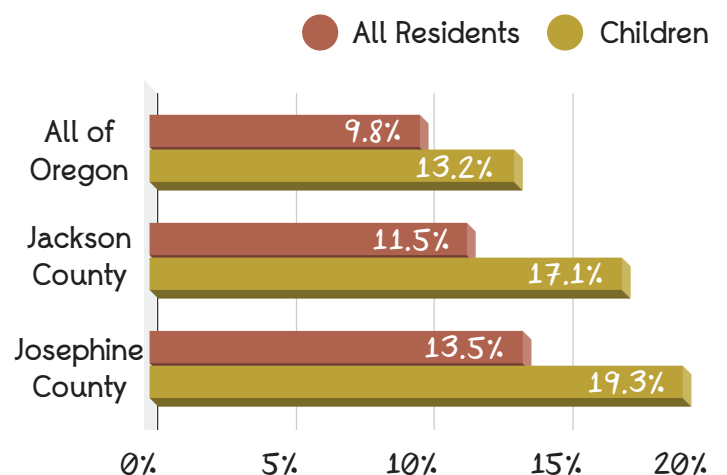
The food system in the Rogue Valley forms the foundation of the region's economy. For example, since 2017,

the sales of value added products have tripled, from \$20 million per year to \$71 million, more than double the state average. Ensuring the Rogue Valley food system continues to thrive, building on its considerable assets while protecting the region's rich soils and important water sources, and ensuring everyone has access to healthy food, while supporting agricultural workers and the farm owners who employ them, is vital for the continued success and resilience of the region.

The Rogue Valley Community Food Assessment and its accompanying Action Plan provide a comprehensive analysis of our regional food system, identifying key strengths, challenges, and opportunities. The RVCFA is intended to provide a high-level overview for government officials and leaders, summarizing the most critical findings, providing data upon which to base decisions, and providing a basis for city, county and even state governments to include support for the regional food system as part of their strategic development planning.

“The pandemic highlighted the incredible reliance we have on those who produce our food. It also made clear the importance of local food systems, and the relatively robust food system that has been cultivated in the Rogue Valley.”

Food Insecurity Rates



Key Findings

1. Agricultural Production: Growth Amid Land Constraints

- The region has seen a large increase in the number of producers since 2012. The Rogue Valley has 50% more producers than it had in 2012. By contrast, the number of producers across the entire state increased by only 19% during that same time frame.
- The number of small-scale farms has grown by 50% in the past decade, yet total agricultural acreage under production has decreased by 4%.
- Farmers are working on smaller plots, with 78% of farms under 50 acres, which presents challenges for equipment and infrastructure needs.
- The region’s largest crop remains hay and forage; food crops account for less than 8% of total production
- Water access, rising costs, and climate variability threaten agricultural sustainability

2. Environmental and Natural Resource Pressures

- Persistent droughts, extreme heat, and wildfires are impacting crop yields and food security
- Irrigation infrastructure needs modernization to conserve water and support sustainable farming practices
- Regenerative agriculture, including no-till farming and cover cropping, is gaining traction as a means of improving soil health

Agriculture in the Rogue Valley By the Numbers

5,910

the total number of producers, representing 8% of all Oregon producers.

3,001

farms and ranches equating to 233,427 acres in production (or 2% of Oregon’s agricultural acreage).

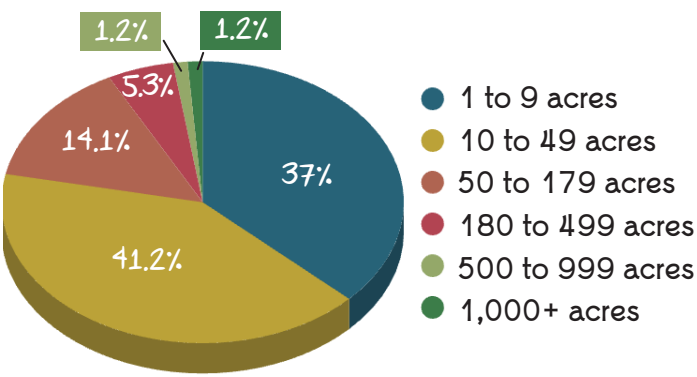
50%

the increase in producers since 2012. By contrast, the number of producers across the entire state increased by only 19% during that same time frame.

2,364, or 40%

the number of producers who rely on farming as their primary source of income, while the remaining 3,546 work additional jobs to make a living.

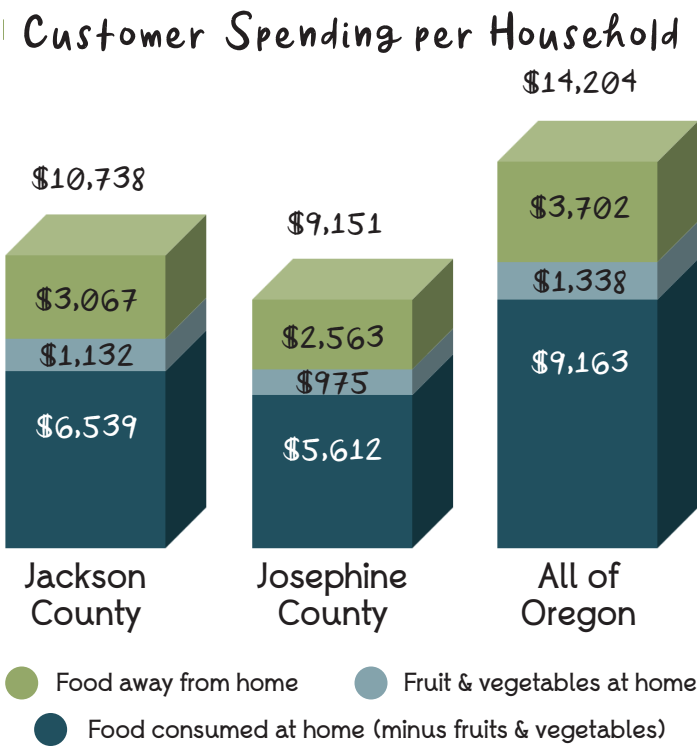
Breakdown of Rogue Valley Farm Sizes (2022)



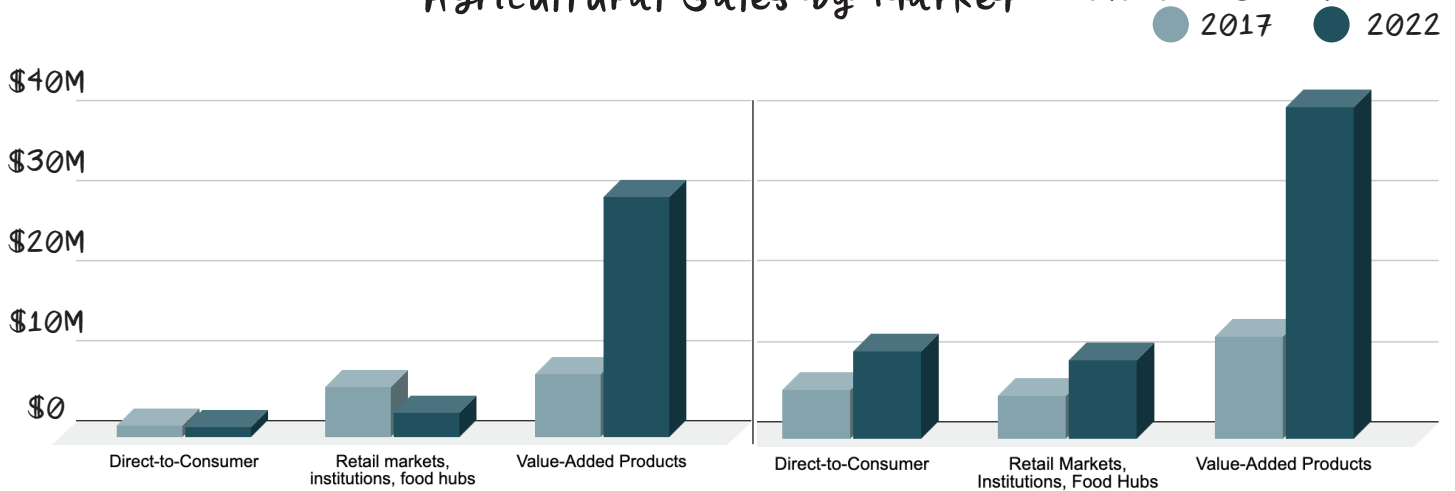
Source: United States Department of Agriculture. 2022 Census by State - Oregon | 2022 Census of Agriculture

3. Consumer Demand

- The sales of value-added products (so products made from produce, ranging from wine to pesto and many other products) have tripled since 2017, moving from \$20 million to \$71 million (this compares to a slight decline in value added sales for the state of Oregon). The Rogue Valley represents 29% of the state’s value-added sales.
- Rogue Valley households on average spend \$8,138 per year on food. Of that \$5,371 is spent on food consumed at home, with \$1,074 spent on fruits and vegetables.
- Currently, on average only 2% of the food con-



Agricultural Sales by Market



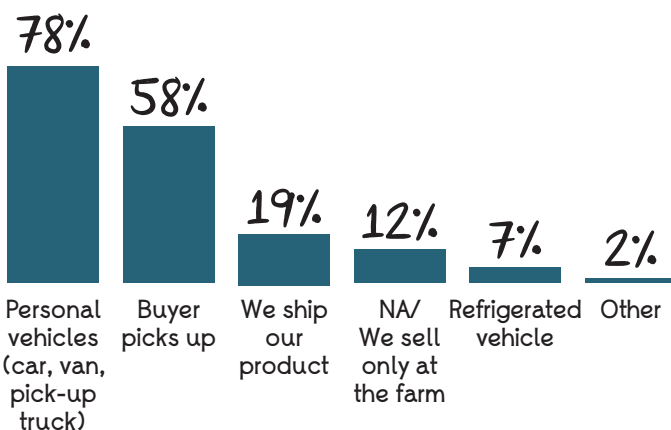
Josephine County

sumed is locally grown. Shifting this to 5% or 10% could have a significant impact on the local economy and community resilience.

4. Food System Infrastructure Gaps

- The Rogue Valley lacks mid-scale processing and distribution infrastructure, forcing many farmers to transport products long distances
- Cold storage, food hubs, and commercial kitchens are critical infrastructure gaps limiting local food access.
- 80% of regional producers rely on self-distribution, increasing costs and inefficiencies.

Which of the following distribution strategies do you use on your farm? Select all that apply.



5. Food Access and Security

- Food insecurity rates are rising, with rural and low-income communities disproportionately affected.
- Grocery store access remains a challenge, with 17% of residents living over 10 miles from a full-service store.

Jackson County

- Federal programs like SNAP and Double Up Food Bucks are improving affordability, but gaps remain.

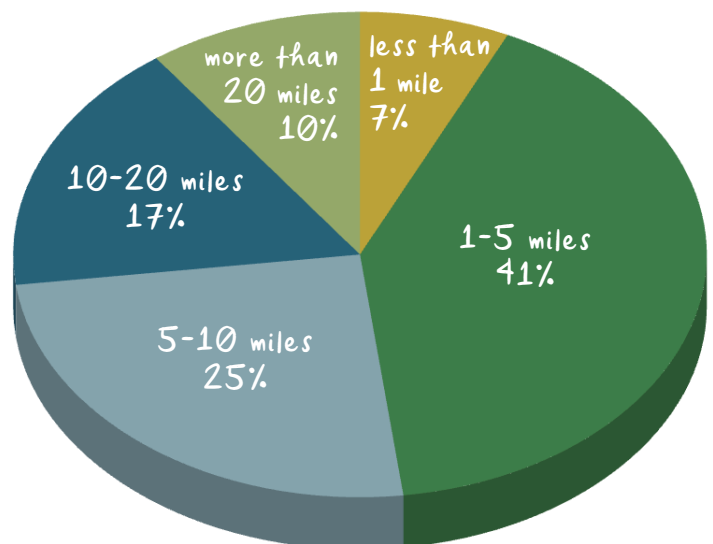
6. Labor and Employment in the Food Economy

- The food economy supports over 18,000 jobs and generates more than \$539 million in annual wages.
- Labor shortages, housing challenges, and wage disparities are limiting workforce retention.
- Mechanization and training programs, such as those by Rogue Farm Corps, are helping bridge workforce gaps.

7. Food Waste and Recovery

- The region lacks coordinated food recovery programs, resulting in significant edible food waste.
- Expanding food waste diversion efforts could improve food security and sustainability.

How far do you travel to get food/groceries?



Moving from Assessment Into Action

The *Community Food Assessment* provides the data and analysis necessary to understand the current state of the Rogue Valley's food system. The *Action Plan* translates these findings into concrete, actionable steps to address the region's most pressing food system challenges.

The *Action Plan* focuses on four core goals:



Within each goal, three to five objectives were identified by the steering committee as central areas of impact that need to be achieved. Within each objective, the steering committee and other advisors identified actions that were needed to achieve the objectives. In total, more than 100 action items were identified as needed to move the needle to reach the Action Plan objectives and goals.

Path Forward

Collaboration is key. The Rogue Valley Food System Network (RVFSN) is convening stakeholders—including policymakers, farmers, food businesses, nonprofits, and consumers—to implement the action plan. Policymakers are encouraged to integrate food system planning into broader regional development efforts, ensuring that economic, environmental, and public health considerations are aligned with food system priorities.

The Rogue Valley Food System Network (RVFSN) serves as the backbone organization for implementing the *Rogue Valley Food Action Plan*, ensuring that collaborative efforts are effectively coordinated and supported. RVFSN will convene and facilitate four dedicated working groups, each focused on one of the plan's core goals: food access, economic resilience, environmental sustainability, and waste reduction. By providing leadership, securing funding, developing impact measures and offering technical assistance, RVFSN will help guide stakeholders through the development and execution of targeted initiatives. Additionally, RVFSN will help foster cross-sector partnerships and drive resource alignment to ensure that the strategies outlined in action plan translate into tangible, long-term solutions for the Rogue Valley food system.

Conclusion

The Rogue Valley has an opportunity to create a thriving food system that benefits all residents while strengthening the local economy and environment. With targeted investments, cross-sector partnerships, and policy support, we can build a more resilient, equitable, and sustainable food system for the next generation. This report provides a roadmap for action—now is the time to bring it to life.



Learn more online at:

rvfoodsystem.org/cfa



[rvfoodsystem](https://www.instagram.com/rvfoodsystem)

