

THE STATE OF AGRICULTURE IN THE HUDSON VALLEY

Jayne E. Daly
Director of Programs



TABLE OF CONTENTS

INTRODUCTION	2
Research Methodology	
The Big Picture: Agricultural Trends in the United States	
A Regional Perspective: Agriculture in the Hudson Valley	
Why It Matters: Understanding the Full Value of Agriculture	
THE STATE OF AGRICULTURE IN THE HUDSON VALLEY	4
Is Farming Over in the Hudson Valley?	
• Chart: Market Value of Agricultural Sector	
Some Facts About Hudson Valley Agriculture	
Farmland	
• Chart: Farmland in the Hudson Valley	
• Chart: Distribution of Farmland by County	
Farms	
• Chart: Number of Farms by County	
• Chart: Distribution of Farms by County	
• Chart: Size of Farms in the Hudson Valley	
• Chart: Farms by Market Value	
• Chart: Ownership Structure of Farms in the Hudson Valley	
• Chart: Farm Tenure	
Agricultural Production	
• Chart: Farms by Principal Production Classification	
Trends in Food Production	
THE FUTURE OF AGRICULTURE IN THE HUDSON VALLEY	11
APPENDICES	
Appendix A:	
Making Sense of the Census	13
Appendix B:	
Changes in Number of Farms Engaged in Production for Selected Sectors (NAICS)	14
Appendix C:	
Changes in Number of Farms Engaged in Production for Selected Counties	17

INTRODUCTION

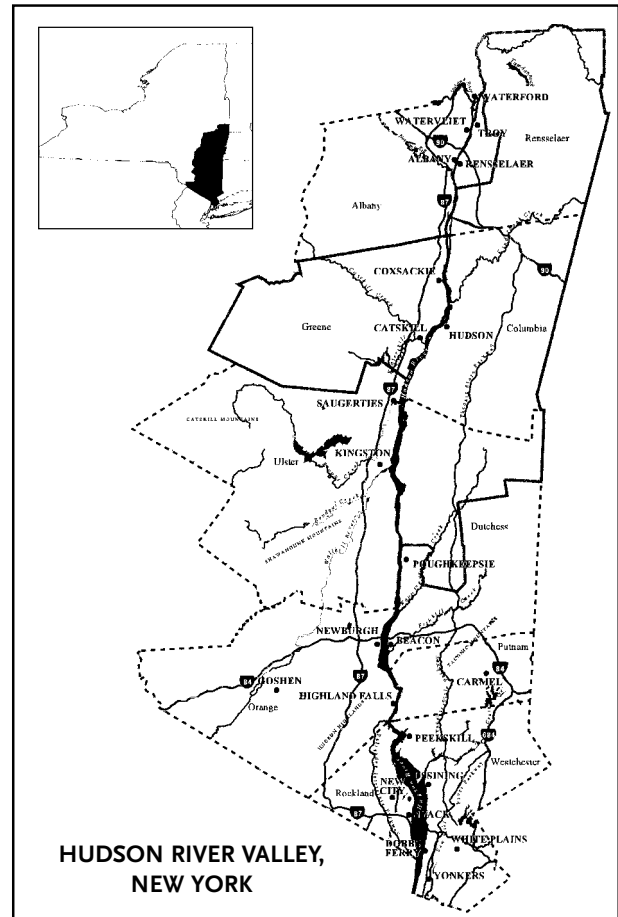
For the past several years, Glynwood Center has been working to strengthen agriculture in New York's Hudson Valley, which includes the ten counties that lie along the Hudson River between New York City and Albany – Westchester, Rockland, Putnam, Orange, Dutchess, Ulster, Columbia, Greene, Rensselaer and Albany. As part of this initiative, in 2003 staff convened a series of meetings to discuss how to reconnect and enhance the regional food system in the Valley. Participants at these meetings brought a variety of perspectives to bear on the issue and included farmers, non-profit and agency representatives and individuals from the Valley. Two important facts came to light through these meetings. First, it is clear that there is growing concern about maintaining farming and in particular, food production in the region. Second, there is very little information available at the regional level about agriculture in the Hudson Valley. This is due in part to the way that statistical data is gathered, which is mostly at the state or county level, rather than regionally. Additionally, the most accurate information that is gathered uses federal grant support and is therefore subject to certain confidentiality provisions. Resultantly, there is little documentation and no comprehensive reports that can be used to garner public and political support for farming in the Hudson Valley.

Research Methodology

Glynwood staff accepted the challenge of documenting the trends in agriculture in the Hudson Valley and began in 2003, by analyzing the available data, the most recent of which was the 1997 US Census of Agriculture. That research was updated with the 2002 Census of Agriculture data, which was released in June, 2004. Where appropriate, other federal sources were examined, as well as the New York State Agricultural Statistics, 2003 Annual Bulletin and other relevant reports.

During the summer of 2004, Glynwood staff held a series of "ground truthing sessions," presenting their research and preliminary findings to over 100 people including farmers; farm bureau; federal and state agency representatives and staff from non-profits that have worked on agricultural issues in the Hudson Valley for years. The purpose of these meetings was to reflect on the accuracy of the data, as well as to discern trends in farming, the challenges faced by farmers and the future of agriculture in the Hudson Valley.

The following reflects an analysis of the most current agricultural data available, refined by hundreds of conversations with stakeholders in the Valley. Glynwood Center staff hope that this report will serve not only to educate the residents and political leaders of the Hudson Valley, but that it will also be used as a template by others who wish to gain a better understanding of farming in their region. For more on how to use this report as a model for other regions see Appendix A, Making Sense of the Census.



The Big Picture: Agricultural Trends in the United States

Across the United States, small and mid sized farms are struggling to stay in business. They must compete not just with large industrial producers, but with the global market that can grow vegetables year round and sell them for less than it costs the local farmer to produce. At the same time, farmers are receiving less and less money for their products on the wholesale market and while farm revenue is dropping, production costs are continually increasing. Additionally, food retailers are getting larger and in the very near future, only the largest farms will be able to supply the quantities of food required by these very large chain stores. As a result, small and mid size farmers are being squeezed out of traditional retail markets.¹

A Regional Perspective: Agriculture in the Hudson Valley

Historically, like most rural areas in the United States, the Hudson Valley's economy was primarily based on agriculture and, in fact, the Valley was once known as the "breadbasket of New York." The region's rich soils supported a variety of fruit and vegetable production, particularly in Orange and Ulster Counties, with dairy and beef farms dotting the landscapes of the more northern counties.

Post World War II, development began to move from the cities into the rural landscape, in part due to the creation of federal and state highways that have expedited transport between New York City and Albany; the popularity of the car; and the desire to own a piece of the countryside. As a result, many of the farms that once characterized the landscape of the Hudson Valley have been turned into housing developments; while others have become commercial shopping centers or industrial facilities.



For many years now, residents of the Hudson Valley have been concerned about the extensive growth in the region and the loss of farmland. Individuals, municipalities and land trusts are working to save farms through a variety of regulatory and financial incentives. Several non-profits have also begun to focus their resources on areas where a "critical mass" of contiguous farmland still exists, so that they can protect not just the land, but the business of farming.

While there is a growing understanding about the need to protect this important resource, government policies and practices continue to push development into rural areas. For example, just a few years ago, a farm at the intersection of Interstate 84 and Route 9 in Fishkill, Dutchess County, New York, was developed as a clothing distribution center. The State and County used economic development grant money to lure the development to the site because it would create tax revenue and jobs. Today, there is a one million square foot warehouse where a productive farm with prime soils once operated. While the site may have been a very good one for a warehouse, prime soils are a significant resource that cannot be moved or replaced.

At the local level, many elected and appointed officials struggle to keep farmland and open space in their communities, but the rising cost of land, coupled with low prices for agricultural products, encourage farmers to sell their properties for development. While local officials want to be fair to the farmers and protect their equity in the land, extensive residential development increases the local tax burden, requires new infrastructure (sewers, schools, and roads) and erodes a community's sense of place.

¹ For more information on the challenges faced by small and mid-sized farmers, see Fred Kirschenmann, "A Revolution in Agriculture", *Gleanings*, Spring 2002, www.glynwood.org.

Why It Matters: Understanding the Full Value of Agriculture

Maintaining farming as a viable part of the community provides many benefits. It supports the local economy; preserves the aesthetic landscape and rural quality of life; protects the environment; and provides a source of local, tasty and healthful food.

From an economic perspective, farms are important small businesses for any community. They provide jobs, sell products and keep money circulating locally by purchasing goods and services from other local businesses and reinvesting in their farm. Agriculture also subsidizes the tax base throughout the Valley because farms pay more in taxes than they require in municipal services. An average house requires \$1.40 in municipal services for every dollar paid in taxes, while a farm costs only 28 cents in services for every dollar paid.

Local farms provide food that tastes good and is healthful. It is important to remember that the loss of small farms is not particular to the Hudson Valley and is being experienced by urban areas throughout the country, if not the world. There is no guarantee that the farms in New Jersey, Florida or California, for example, which supply food to the Hudson Valley, will continue to exist, given current trends. Although the Valley's food shelves are stocked with agricultural products from around the world, in an age of rising fuel prices and global uncertainty, maintaining a local food supply is an important part of homeland security.

Agricultural landscapes also enhance the quality of life for residents and visitors. The scenic viewsheds that farming preserves – the barns, animals and crops – make the countryside more appealing and valuable.



Farms also protect our natural resources. Most small farmers are good resource stewards. Many farmers protect the water supply by eliminating or reducing the use of chemicals through integrated pest management. They also manage their livestock and manure in ways that maintain the high quality of the region's streams. Farming also preserves biological corridors so that wildlife can migrate, without crossing the highways. Agriculture also keeps the air clean and the night sky dark – so that you can see the stars.

STATE OF AGRICULTURE IN THE HUDSON VALLEY

Is Farming Over in the Hudson Valley?

There is a perception that agriculture is no longer a viable industry in the Hudson Valley, and that the best people can hope for is to keep the land "open" and free from development. This perception is based on a few factors:

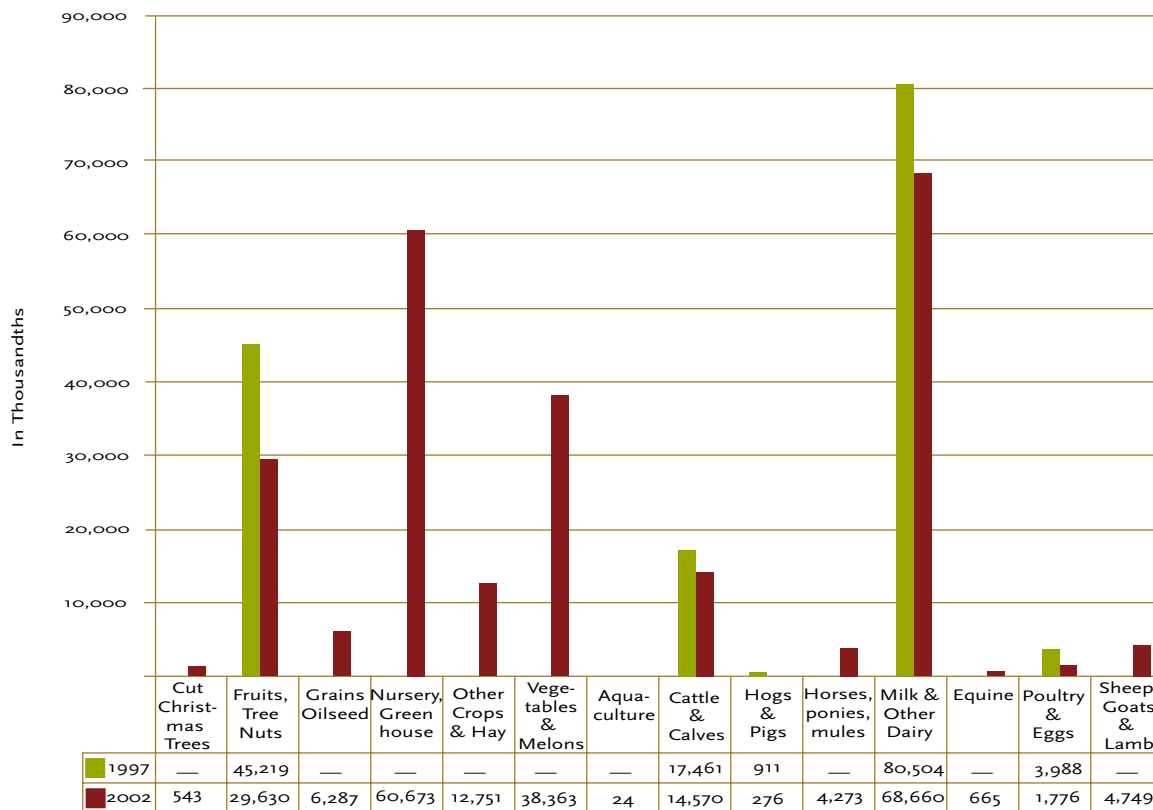
- There has been a significant amount of development in the Valley over the last twenty years. According to a study conducted by Marist College, residential building permits were up an average of 37% between the fourth quarter of 2002 and 2003, with Columbia and Rockland Counties leading the way in proportional increases of 71.4% and 110.6% over the previous year. Orange County, however, led the region in the average number of building permits issued, 161.

As more and more farms are developed, it gets harder for the remaining farms to stay in business as services that support the farms disappear; neighbors complain about the noise and the smell; and it becomes more difficult to move farm equipment on congested roads.

- It is hard to make a decent living in farming. In 2002, net cash farm income² was only \$1,248 per farm, with more than two-thirds of Hudson Valley farms reporting a loss. These losses reflect the

² Net cash farm income is derived by subtracting total farm expenses from total sales, government payments and other farm-related income.

decline in market value of the agricultural sector, which dropped 14% between 1997 and 2002 - from \$303 million to \$261 million, with the greatest losses being suffered in the dairy and fruit sectors. Additionally, production costs have increased an average of 25% in the Valley, making it even more expensive to farm than in previous years.



MARKET VALUE OF AGRICULTURAL SECTOR

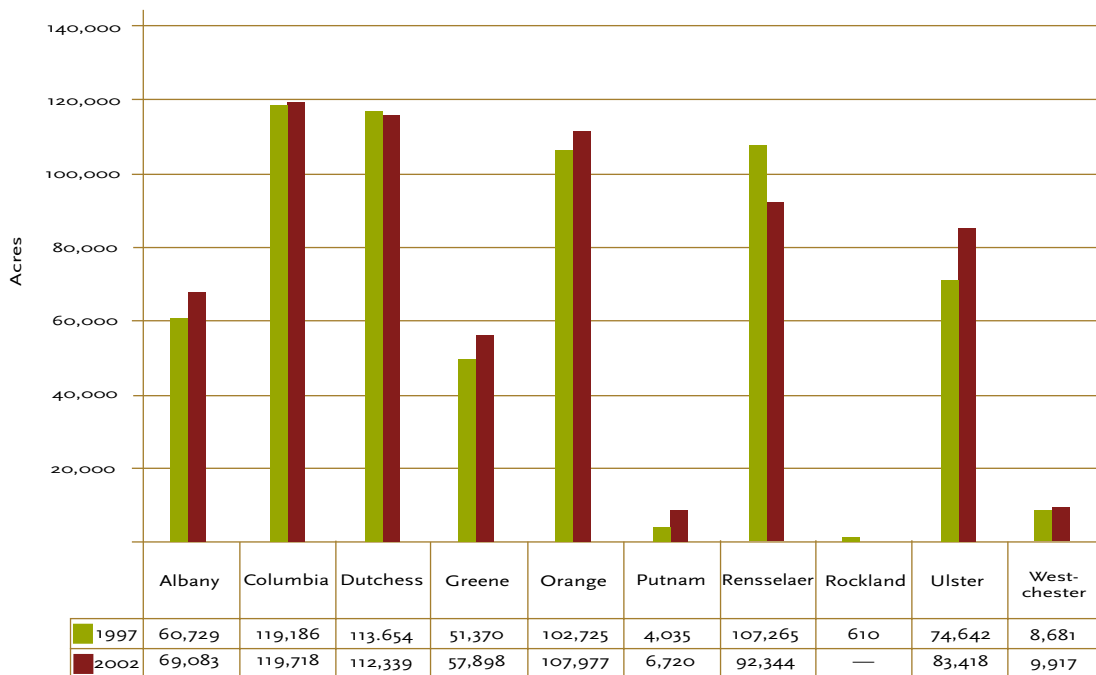
- Land values have risen substantially and farmers have a tremendous opportunity to sell their land for a significant amount of money. Rising land prices also make it prohibitively expensive for others who want to farm to buy land in the Valley.
- Finally, for many farm families, their sons and daughters are not interested in working the land. As a result, there is a sense that farming will only last as long as this generation of farmers keep working.

There is no denying that each of these factors may be true, however, the overall conclusion that agriculture is not viable in the Hudson Valley is incorrect. There are other facts, perhaps less well known, that present a strong argument that agriculture is still an important resource in the Hudson Valley.

Some Facts about Hudson Valley Agriculture:

Farmland: Agriculture is still a substantial land use in the Hudson Valley. There are 659,394 acres of farmland in the Valley, which represents 17.35% of the total land mass in the region or the equivalent of over 1,000 square miles. This is a significant amount of land given the extent of development that has taken place in the Valley during the past 20 years.

Between 1997 and 2002, the Valley gained 16,500 acres of farmland, increasing from 642,897 acres to 659,394 acres. Eight of the ten counties reported an increase in farmland, with Albany and Ulster counties gaining over 8,000 acres each. Rensselaer and Dutchess counties were the only two counties to report a loss in farmland of 14,921 and 1,315 acres respectively. This data reverses earlier trends in farmland loss.



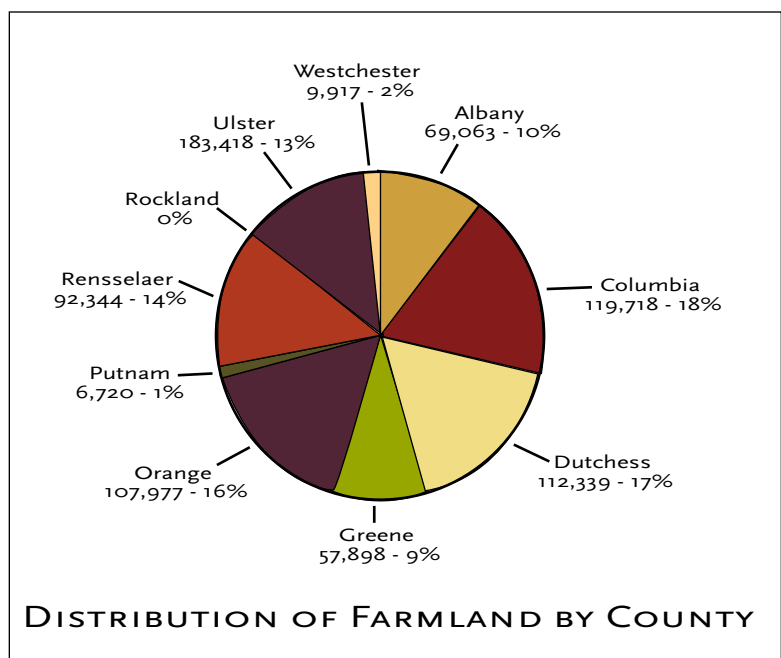
FARMLAND IN THE HUDSON VALLEY

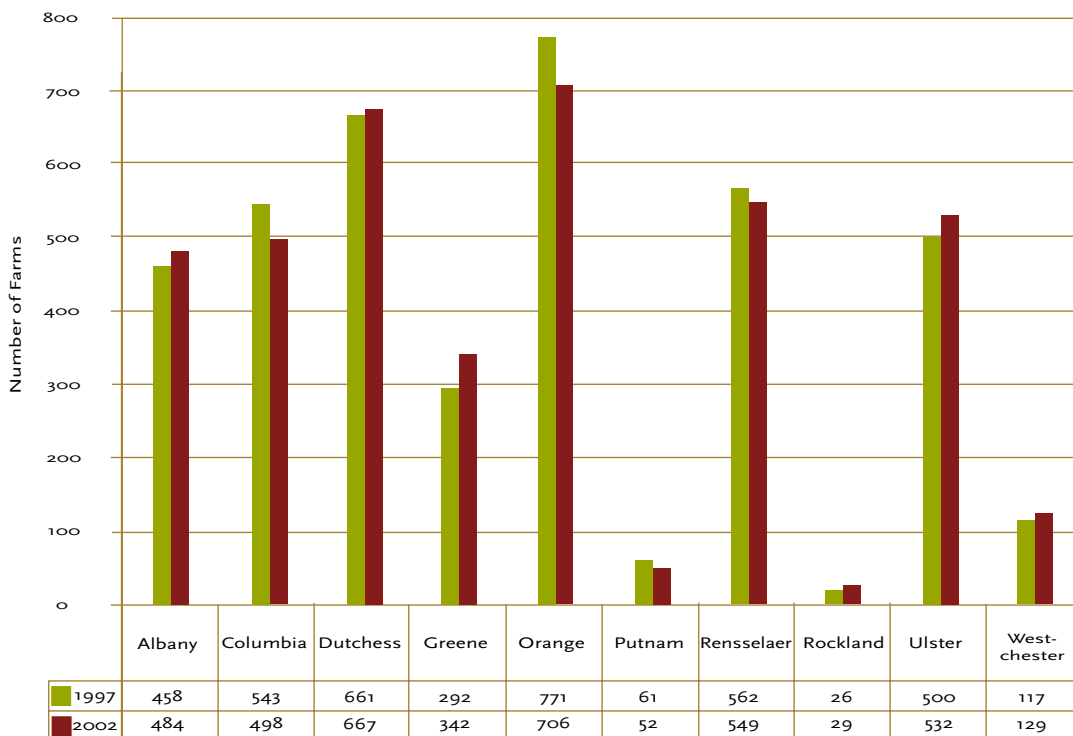
Between 1987 and 1997, the Valley lost 96,000 acres of farmland, or roughly 14% of its total farmland acreage. According to the latest New York State statistical bulletin, there has been no material change in the amount of farmland in the Valley between 2002 and 2003.

This regional "growth" in farmland can be attributed in large measure to a continuously expanding definition of agriculture and increased reporting. In 1997, the definition of agriculture was expanded to include equine. Since that time, federal, state and local agency representatives have encouraged more and more horse farms to become involved in agricultural programs and to complete and return the census forms. Additionally, the federal government and New York State define "a farm" as "any agricultural operation that produces or sells over \$1,000 worth of product." This very low financial threshold statistically includes as "farms", agricultural operations that might not be recognized as a "farm" on the landscape. Examples of these types of operations might include producing and selling herbs, honey, maple syrup, and cut flowers, on parcels as small as one acre.

The Valley's farmland is distributed relatively evenly throughout the region, except for the southern three counties (Westchester, Rockland and Putnam). Most counties maintain between 13% and 18% of the region's farmland. This dispersion is important because it indicates that there is no single area or county that if developed would undermine the region's agricultural system.

Farms: There are 3,988 farms in the Hudson Valley. Although the data indicates that the region lost a total of 5 farms between 1997 and 2002, six



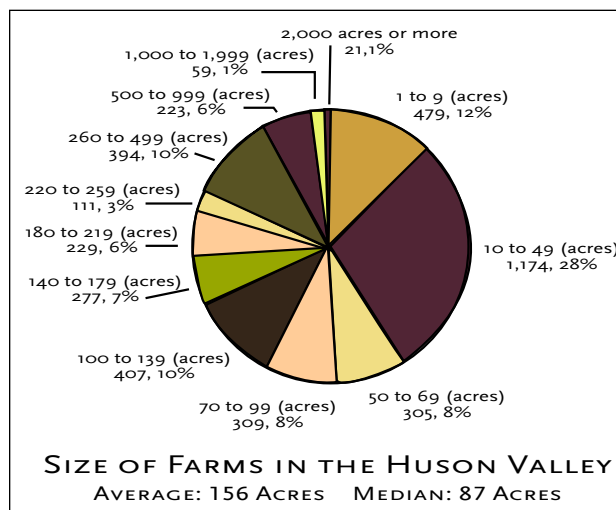
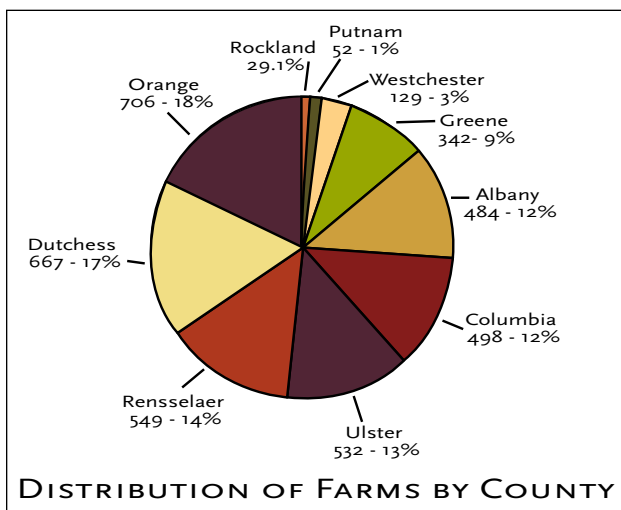


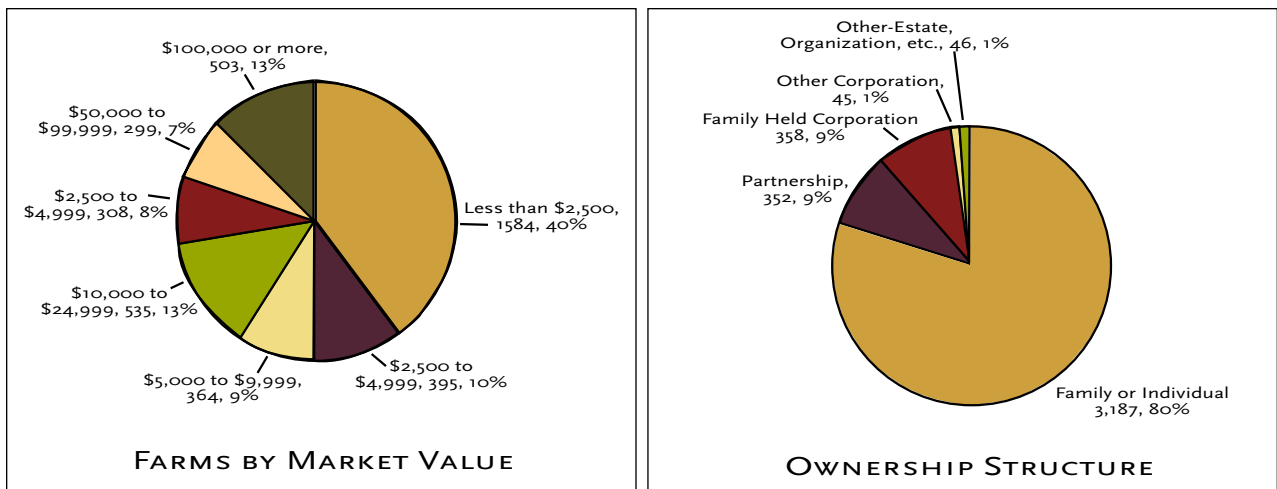
NUMBER OF FARMS BY COUNTY

counties reported a cumulative increase of 129 farms – Albany, Dutchess, Greene, Rockland, Ulster and Westchester – and four counties – Putnam, Columbia, Rensselaer and Orange, reported a cumulative loss of 134 farms, with Orange suffering the greatest loss of 65 farms.

Like the region’s farmland, the farms are evenly dispersed throughout the counties, except for Rockland, Westchester and Putnam, which supported only between 1% and 3% of farm operations. Orange County maintains the most number of farms (706 farms, 18% of total), followed by Dutchess (667 farms, 17%); Rensselaer (549 farms, 14%); Ulster (532 farms, 13%); Columbia (498 farms, 12%); Albany (484 farms, 12%) and Greene (342 farms, 9%).

Hudson Valley farms range in size from very small (1 to 9 acres) to more than 2,000 acres, with the average at 156 acres. More than half of the farms in the Valley are under 100 acres, with the majority of those farms ranging from 10 to 49 acres (1,174 farms; 28% of total). There is no clear trend at the County level with respect to growth or loss in small farms or large farms. County statistics vary across the Valley with some showing an increase in small farms and others in large farms.





The predominance of small farm operations in the Valley is also reflected in their value of sales, with 59% of the farms in the Valley reporting sales under \$10,000, and only 13% reporting sales over \$100,000. These statistics, however, mirror the State overall, which reported that in 2003, 53% of NY farms (average farm size 207 acres) had sales of less than \$10,000 and 17% reported sales of over \$100,000.

Farms in the Valley are owned predominantly by individuals or families, some in partnership form and others as corporations. Only 1% of the farms are in a non-family corporate structure. This statistic is important because it indicates that there is no evidence of corporate consolidation in the farming sector, which is prevalent in many other areas of the country where corporations are buying up farmland and consolidating it into large industrial agricultural operations.

Overwhelmingly, farmers own the land that they farm and many rent additional land. There are only a small percentage of farmers that are “tenant farmers”.³

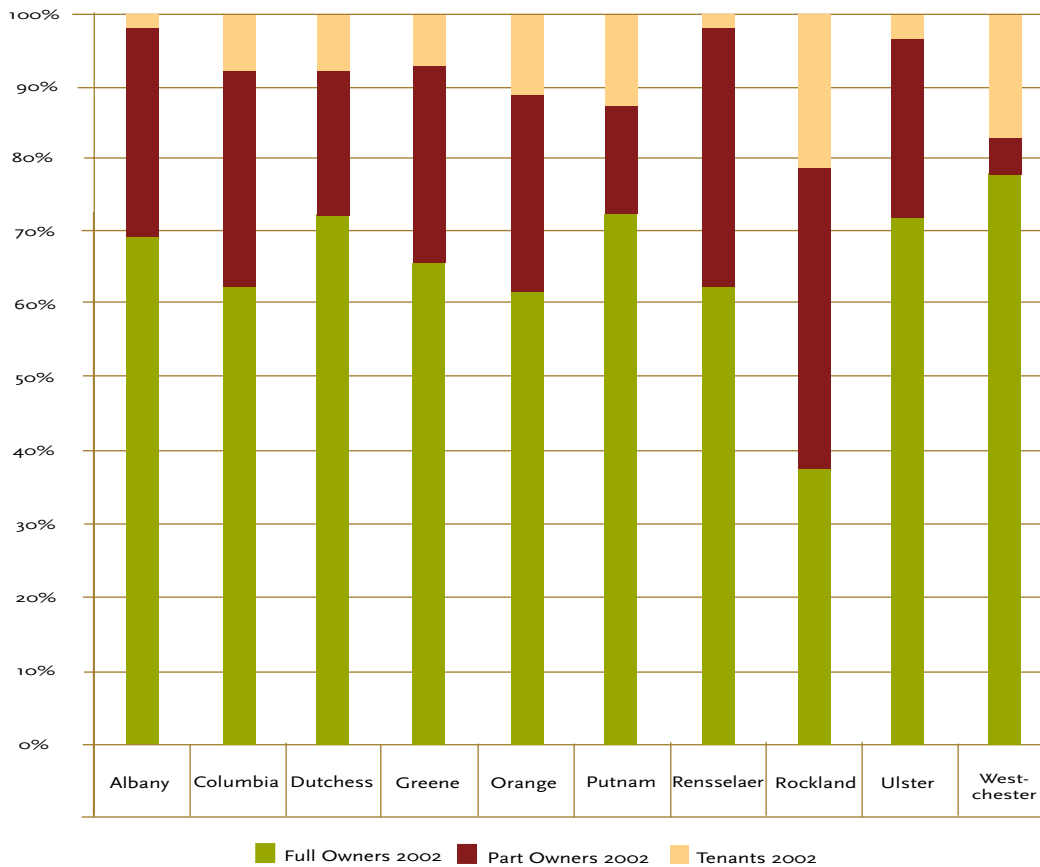
Agricultural Production: Farms in the Hudson Valley produce a variety of products: 28% of the farms grow grains, soybeans and hay; 25% raise animals: beef and dairy cows; sheep and goats; hogs, pigs, poultry; 21% raise horses; 14% grow a wide variety of fruits and vegetables and 12% are involved in greenhouse/nursery production. In fact, 40% of the farms in NY that produce cauliflower, eggplant, melons, okra, turnips and nectarines are in the Hudson Valley.⁴

Production trends in the Valley indicate a very clear shift away from traditional "food" production agriculture toward more economically viable uses of agricultural land. Between 1997 and 2002, the Valley lost 463 dairy and beef farms and an additional 84 farms that produce fruits and vegetables. These losses have been predominantly in the areas of the Valley where dairy and beef, fruit and vegetable production were strongest – Orange, Ulster, Columbia, Rensselaer and Dutchess Counties.

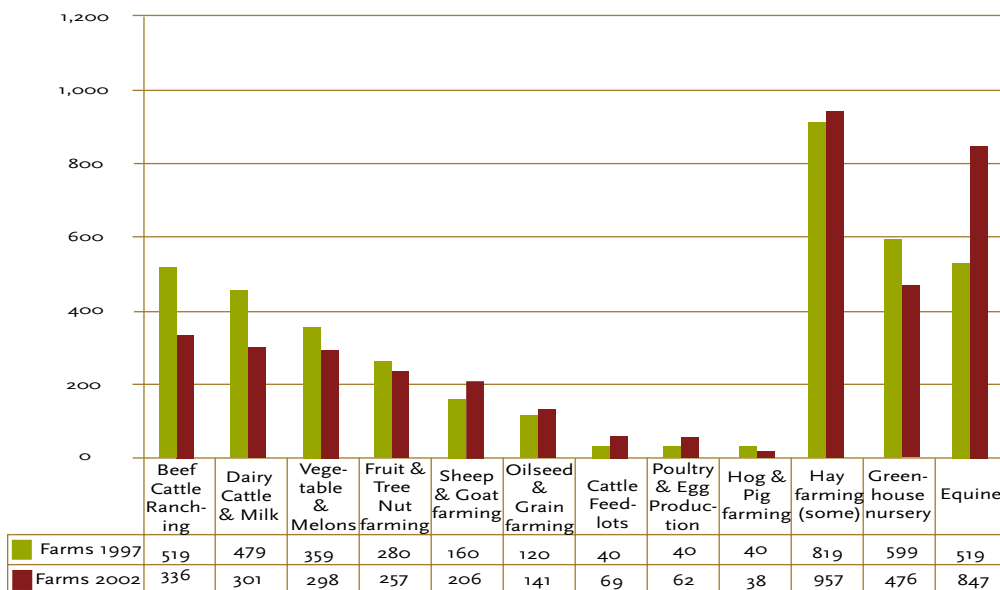
There was a corresponding increase in the number of farms that are engaged in "non-food" related production. The number of horse farms increased by 328, with every county reporting an increase in both the number of farms and inventory. The number of farms producing hay also increased by 138, with production levels up 72%.

³ The US Census of Agriculture identifies three types of owners—full owners are those who farm only the land that they own; part owners farm the land that they own and rent additional land that they farm; and tenant farmers who do not own any of the land that they farm.

⁴ These statistics are based on the North American Industry Classification System, which was instituted in 1997 in order to produce comparable industrial statistics for Mexico, Canada and the United States. Farms are classified based on their primary production. Therefore a farm that is classified as Dairy Cattle is primarily engaged in milking dairy cattle, even if portions of the farm are used to grow feed for the cattle.



FARM TENURE



FARMS BY PRINCIPAL PRODUCTION

The increase in the number of farms engaged in hay production can be attributable to a few factors. First, many second home owners are making their land available for haying to take advantage of beneficial agricultural tax rates. This phenomenon has been very good for farmers who previously had difficulty finding land to rent. Second, a number of dairy farmers are transitioning away from keeping animals, but continue to hay. As one farmer said – the transition is from dairy to hay to

horses or houses. Finally, there is a growing customer base for hay that is driven by the equine industry. The Hudson Valley produces some of the best hay in the Northeastern United States and the price of hay is at an all time high, which has encouraged farmers who might otherwise have sold their land to continue to farm.

The Valley has also seen significant growth in the nursery/greenhouse sector, which is in part a result of the high market value of these products and growing demand from suburbanization. Since 1987, the number of farms engaged in nursery/greenhouse production has more than doubled. There has also been a 50% increase in production under glass (5.5 million square feet or about 126 acres), most of which is bedding plants and flowers.⁵



One of the newest trends in agriculture in the Hudson Valley, which is not yet reflected in the statistical services, is the transition of farms to hunting preserves. These new "farms" are becoming more and more popular and have begun to dominate the eastern portion of Dutchess and Putnam counties. For example, the Ten Mile River Preserve, a "Members Only" hunting preserve, was established in the Town of Dover on a 2,500 acre former dairy farm. Members can hunt a variety of birds (quail, pheasant); as well as deer and wild turkey. The Preserve also provides opportunities for members to practice shooting at pistol ranges and clay shoots. The alternative development proposal for the property was for over 700 new homes, which would have placed a serious financial burden on the Town.

Hunting preserves are another example of the expanding definition of what constitutes "agriculture". New York State Department of Agriculture & Markets has determined that where there is livestock or crops raised on hunting preserves, these uses constitute agriculture under the law and the owners are therefore able to take advantage of the tax exemptions and other benefits that were developed for more traditional farms. On one farm in Dutchess County, the agency determined that the qualifying agricultural product was "deer semen."

Trends in Food Production

While all types of agriculture protect the land base from development, farms producing food will need the greatest support if they are to remain a viable part of agriculture in the Valley. Despite the significant loss of farms engaged in food production, there are some positive trends that can be built upon to strengthen the region's food system.

Buy Local: There is growing recognition that buying local food makes sense. Economically, farmers can get a higher price for their product by marketing directly than they can by selling into the wholesale markets. Consumers are often willing to pay more for taste and quality or because local production methods support other values such as the humane treatment of animals and environmentally friendly production methods.

Direct Marketing: Between 1997 and 2002, there was an increase of 10%, from 611 to 676, in the number of farms that sell their products directly, through farmers' markets; roadside stands; pick-your-own; community supported agriculture; or on the internet. While the number of participating farms represent only 17% of the total farms in the Hudson Valley, the market value of the products sold through direct marketing almost doubled between 1997 and 2002, rising from \$8.93 to \$15.35 million. This trend reflects the essential need that is evident within all the agricultural sectors – farmers are finding ways to make farming economically viable in the region.

⁵ These statistics represent the number of farms reporting any greenhouse production, including Christmas tree farms. They do not reflect reporting under the NAICS, which showed a decrease in the number of farms that are involved principally in greenhouse operation. This indicates that the greenhouse sector is a lucrative "add-on" for farming operations, as opposed to a principal use.

Diversification: Farmers are diversifying their operations and growing new products for niche and ethnic markets (goats, alpacas, sheep and venison). They are finding ways to make more money by processing their raw products into value added items such as cheeses, pies, jams, preserves, etc. Many are taking advantage of the public's desire to spend time on a farm and "experience the countryside." Farmers are developing agri-tourism opportunities that range from the common pick-your-own fruits and vegetables to corn mazes, haunted houses, winery visits, artists retreats and bed-and-breakfast accommodations.

But direct marketing and agri-tourism are not an answer for every farm, particularly for dairies and beef farmers who face the challenge of moving a substantial amount of product that does not lend itself to direct marketing. For those beef farmers interested in creating value-added products to be sold locally, there is a lack of infrastructure in the Valley to have meat slaughtered, butchered and then sold to local restaurants or specialty stores. Processing facilities for dairy are also limited. There are a number of studies underway, however, that are looking at the infrastructure needs in the Valley, with the expectation that the necessary processing facilities can be reestablished to support regional production and sales.

In addition to farmers adapting to new economic opportunities, there is growing support for farming at the municipal and county level. Several towns have taken the initiative to raise money to purchase development rights from farmers, permanently protecting that land from development while paying the farmer for his equity.

Counties and large land trusts have begun to provide the financial match which is required for municipalities to access state money for purchase of development rights. Since the financial match can sometimes be hundreds of thousands of dollars, for many municipalities, state funding was inaccessible prior to these other organizations offering their support.

Many towns have begun to rewrite their local zoning ordinances to include provisions that protect farmland and support the business of farming. These provisions include making certain activities such as machine shops and commercial kitchens "as of right" uses within an agricultural district and streamlining the permitting process so that farmers can work directly with the building department rather than seeking planning permission for agriculturally related projects on their property. Modifying local regulations not only support the economics of farming, they also show the region's farmers that residents and elected officials support agriculture.

THE FUTURE OF AGRICULTURE IN THE HUDSON VALLEY

There is reason to be hopeful about the future of agriculture in the region. In summary:

- There is a substantial amount of farmland left in the Valley with 4,000 small farms producing a variety of products;
- Alternative uses of agricultural land that are more economically viable than food production are keeping the land open and free from development;
- Farmers are becoming more and more willing to think and act creatively to sell their products in ways that give a sustainable economic return; and
- Non-profits, agencies, towns and villages are becoming involved in farmland protection and supporting regional agriculture.

There is still work to be done. During the "ground truthing" sessions, farmers who produce food identified the following continuing needs:





- Access to new markets such as local restaurants, retail stores and institutional buyers, where the farmer can receive a fair price for his or her product;
- An efficient distribution network that will move product from the farm to the purchaser, without requiring the farmer to drive it there;
- More local processing facilities so that farmers can get their product to the consumer;
- Smarter consumers who understand where food comes from and that price is only one factor to consider when making purchases; and
- More education for local politicians and boards so that they understand how their policies and decisions affect farming in the Valley.

Finally, other areas of the country that have been working to strengthen their regional food systems have found that it is important to develop a widespread, fundamental and passionate belief that agriculture must be part of the region's future. This belief galvanizes the community and policy makers to support agriculture and gives the farmers the confidence they need to persevere.

Conclusion: Action Speaks Louder than Words or Statistics

This passion for the future of agriculture can take root in the Hudson River Valley, but policy makers, farmers and residents will need to be convinced by actions and not just words or statistics.

What you can do:

- Buy and serve local food at home and work;
- Encourage local institutions to use local products;
- Support restaurants that use and promote local products;
- Raise the issue of supporting farming at municipal meetings;
- Volunteer to raise awareness about agricultural issues in your community; and
- Lobby the state for more money for purchase of development rights programs.



There's a great deal to do and a great deal that can be done. Agriculture in the Hudson Valley will depend on our commitment to its future ... and our actions.

APPENDIX A: MAKING SENSE OF THE CENSUS

The Census of Agriculture is the leading source of facts and statistics about farmland and agricultural production in the United States. It provides a detailed picture of US farms and ranches every five years and is the only source of uniform, comprehensive agricultural data for every state and county in the US. Data is currently available for 1992, 1997 and 2002.

In 2002, responsibility for data gathering shifted from the US Bureau of Census to the National Agricultural Statistics Service (NASS), a department of the US Department of Agriculture. In early 2002, NASS mailed 2.8 million surveys, which were to be completed by the principal farm operator or owner and returned. This information was then compiled at the national, state and county levels. For the 2002 Census, NASS adjusted the data to account for surveys that were not returned, which was estimated at approximately 10%. The data was adjusted based on each state's top 15 commodities and the strength of the commodity at the county level. For some counties, this resulted in a 20% increase in some production sectors over previous census data. Another important result of the readjustment is that the 2002 information is not comparable to census data released before 1997, because that data had not been adjusted for non-responses. To accommodate for the need to track trends with the data, NASS re-released adjusted data for certain production sectors for 1997. It took NASS over two years to compile and adjust the data for the 2002 Agricultural Census and the final report was released on June 4, 2004.

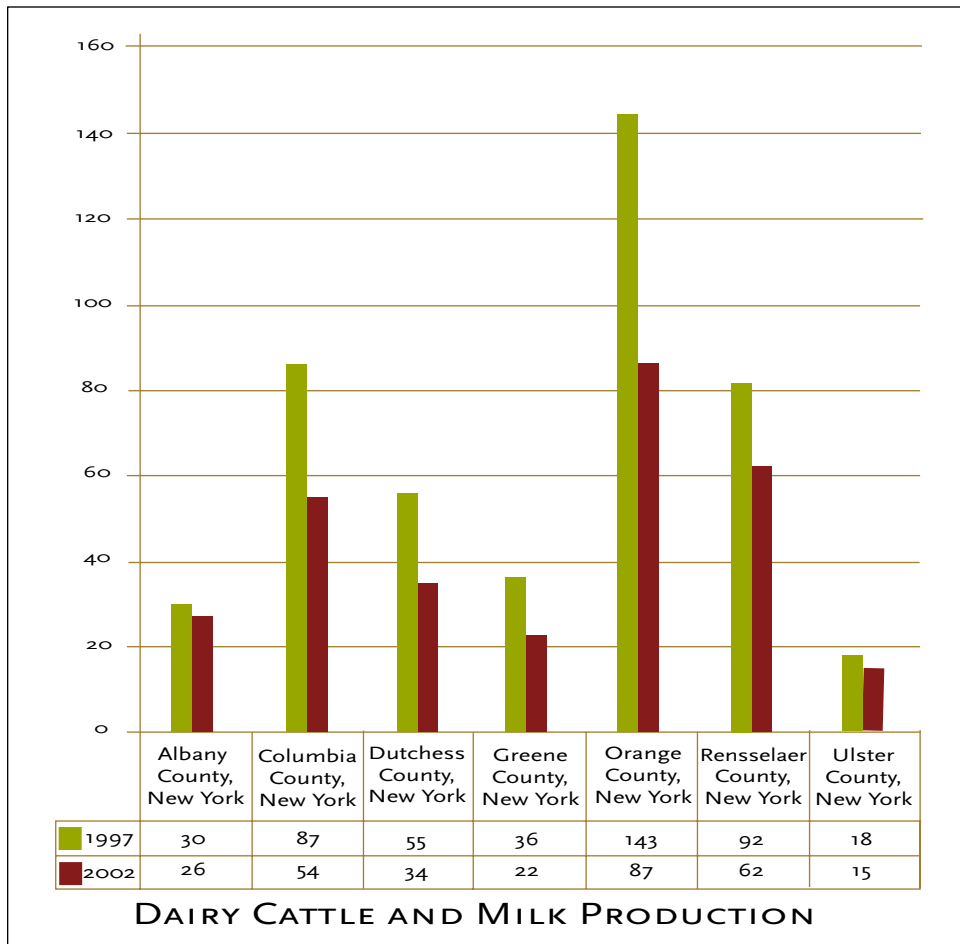
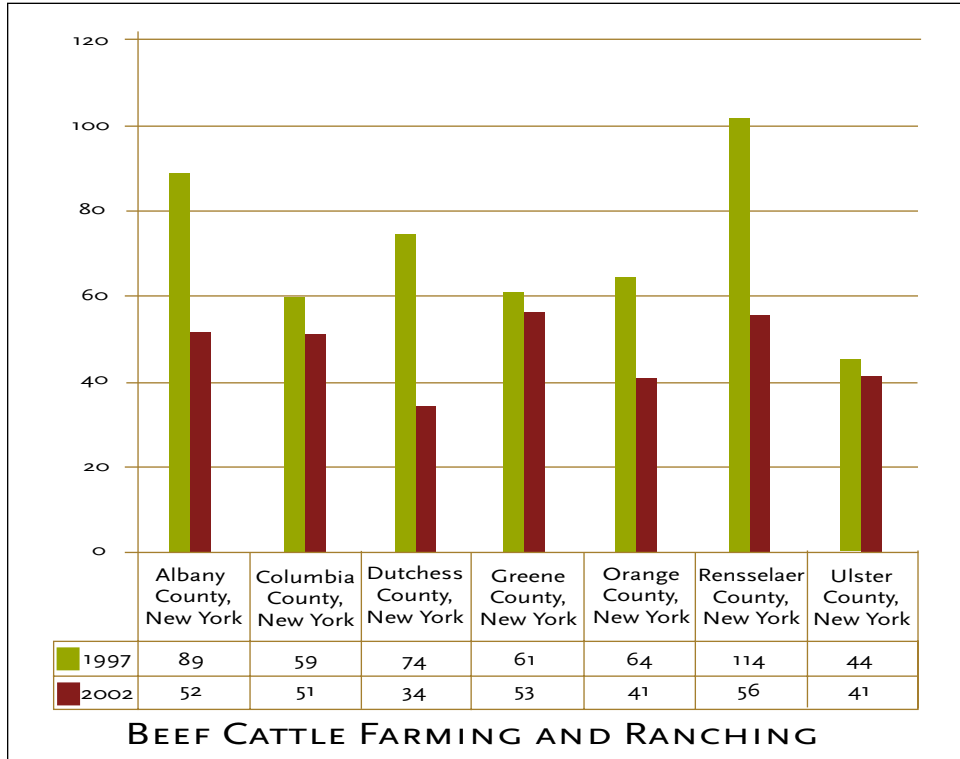
The statistics contained in the Agricultural Census are arranged in tables and provide information about farmland, labor, income, farmers and production within selected sectors. It is important to recognize that production information is provided for in two formats. The vast majority of the tables (Tables 8 through 35) provide information that is generated for all farms reporting any production within a given sector. For example, most orchards in the Hudson Valley are primarily engaged in apple production, but they also grow pears, peaches and other fruits. The statistics reported in Tables 8 through 35 include information for all production generated at the farm. What you cannot tell, however, is how much production is generated on any given farm or generally, how much farmland is being used for production. Table 51, however, provides another format for production information that is based on the North American Industry Classification System. Through the surveys, farmers are asked to classify their farming operation according to its primary production. For example, a farm might be primarily a dairy operation, but also grow corn for feed and have a few sheep. The information in Tables 8 through 35, include information on the farm's production for dairy, corn and sheep. Table 51 includes the farm only as a dairy operation. This information is helpful to discern the strength of a sector within a region and shows increases or decreases in the number of farms dedicated to a certain production sector. This information can show important trends, as is indicated in our report on the Hudson Valley, where the number of farms stayed relatively stable, but the production shifted greatly from food (beef, dairy, fruits and vegetables) to non-food (horses, hay and equine).

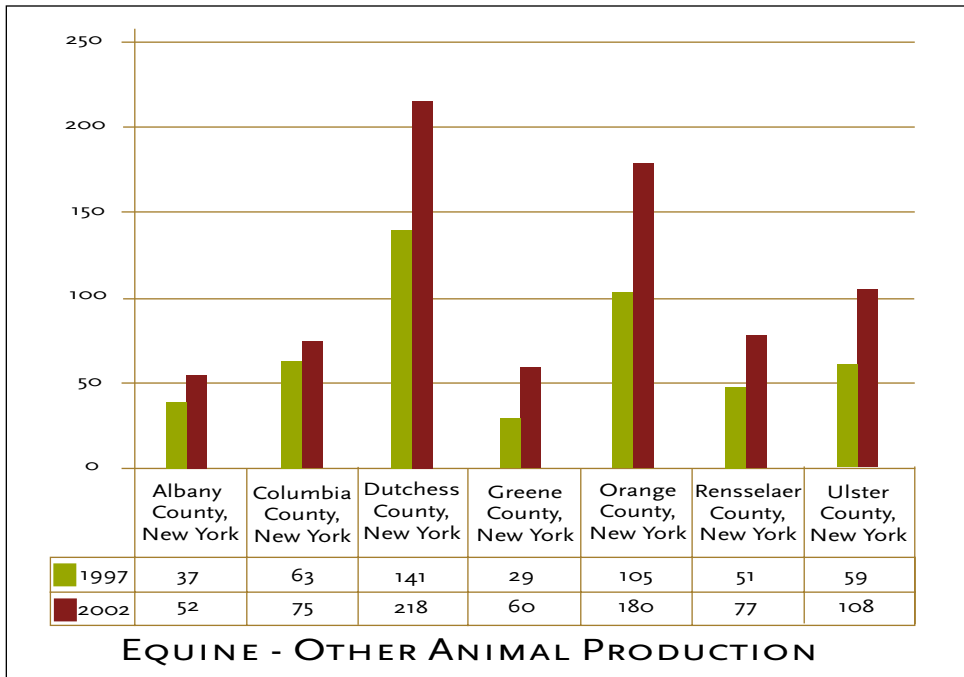
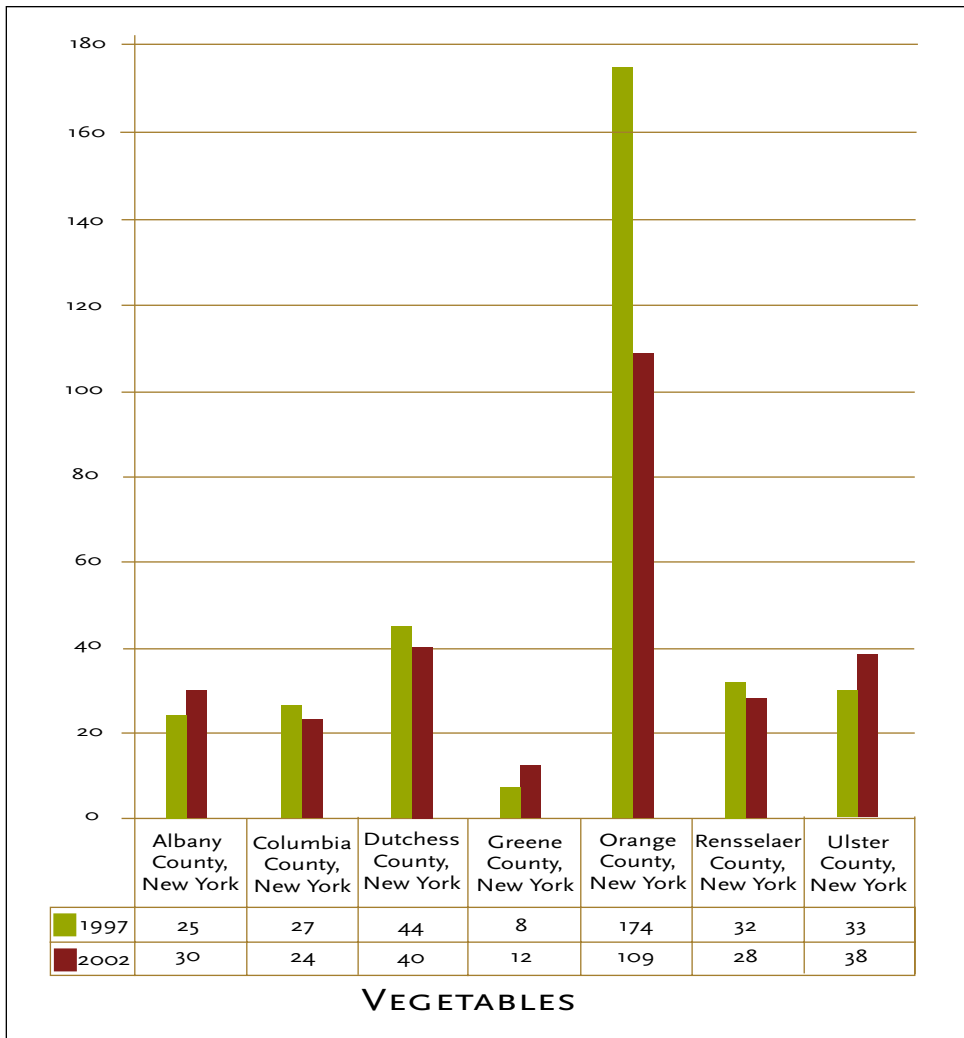
To create your own regional profile, you can download the 2002 report for your state, which contains state and county level statistics from the USDA's website at www.usda.gov/nass. You will need Adobe Reader software to download the report. Although previous data is no longer comparable, we found it helpful to download earlier census reports to consider trends within certain production sectors. Each state report has a table of contents which can be helpful in determining what information you want to consider in your analysis.

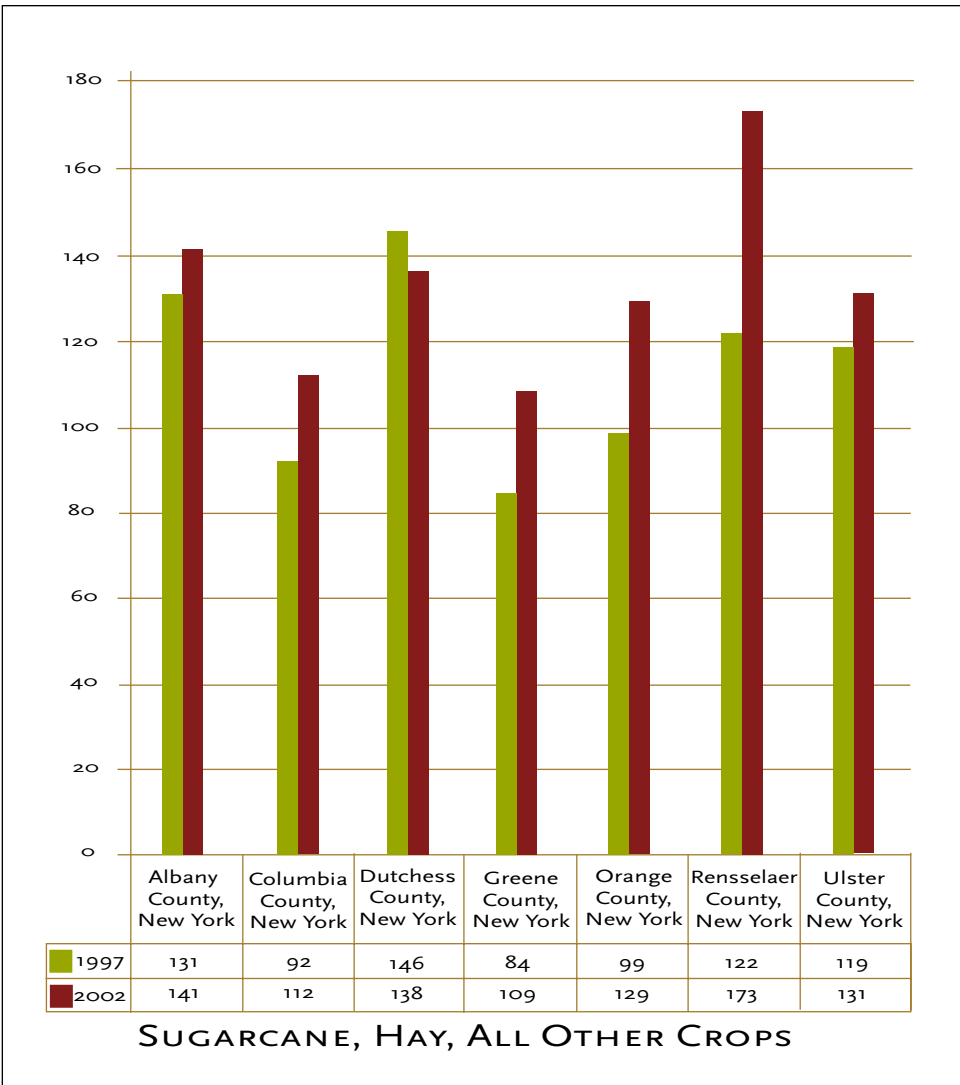
For our report, we analyzed data for the Hudson Valley region, which is comprised of ten counties, by adding together the information provided for each of the ten counties. We studied farmland and production trends at the regional and county levels to discern the greatest threats and strengths in the Valley. We looked at overall production as well as trends reflected in the NAICS, Table 51. In the end, we found this analysis to be very useful for two reasons. First, the information contained in this report reflects the most comprehensive analysis of agriculture in the Hudson Valley and is the only report to generate a complete picture of the trends in the region. Secondly, the report has provided a vehicle for discussion, among farmers, non-profits and agency people regarding what must be done to support agricultural production and farmland preservation in the region.

APPENDIX B:

Changes in Number of Farms Engaged in Production for Selected Sectors (NAICS)

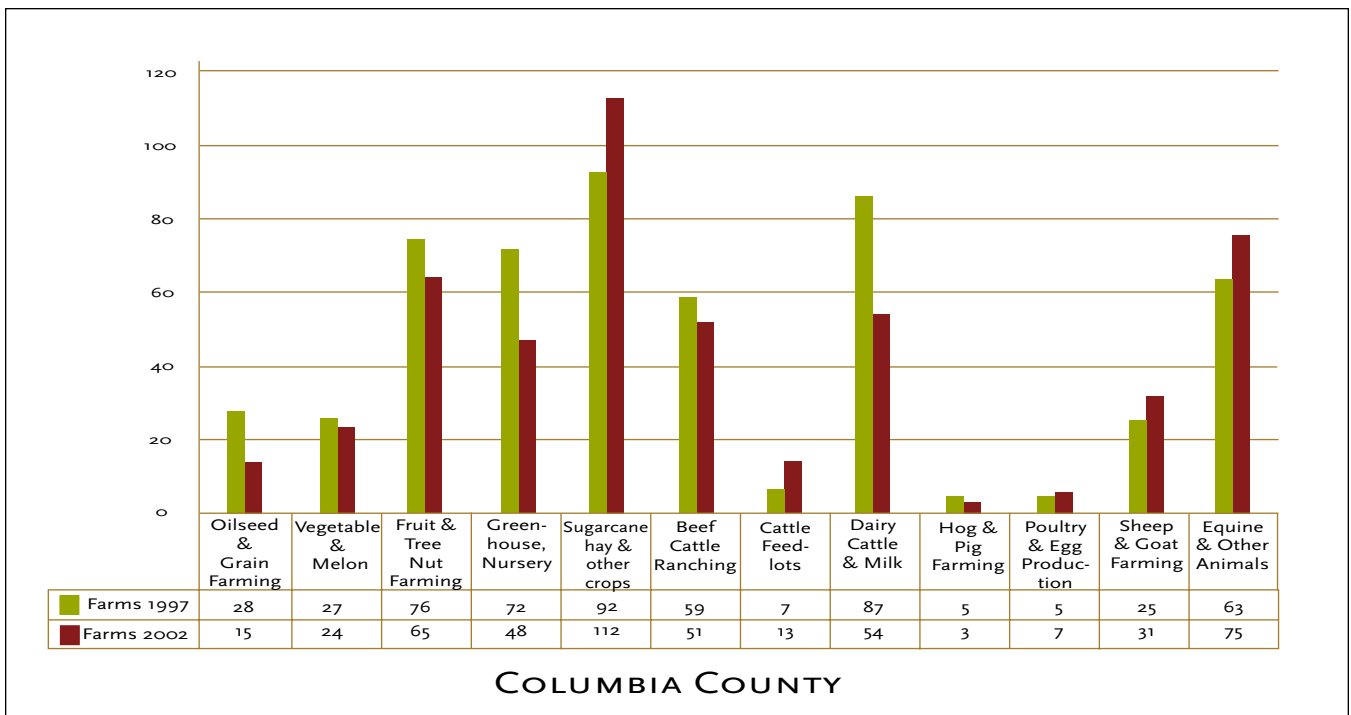
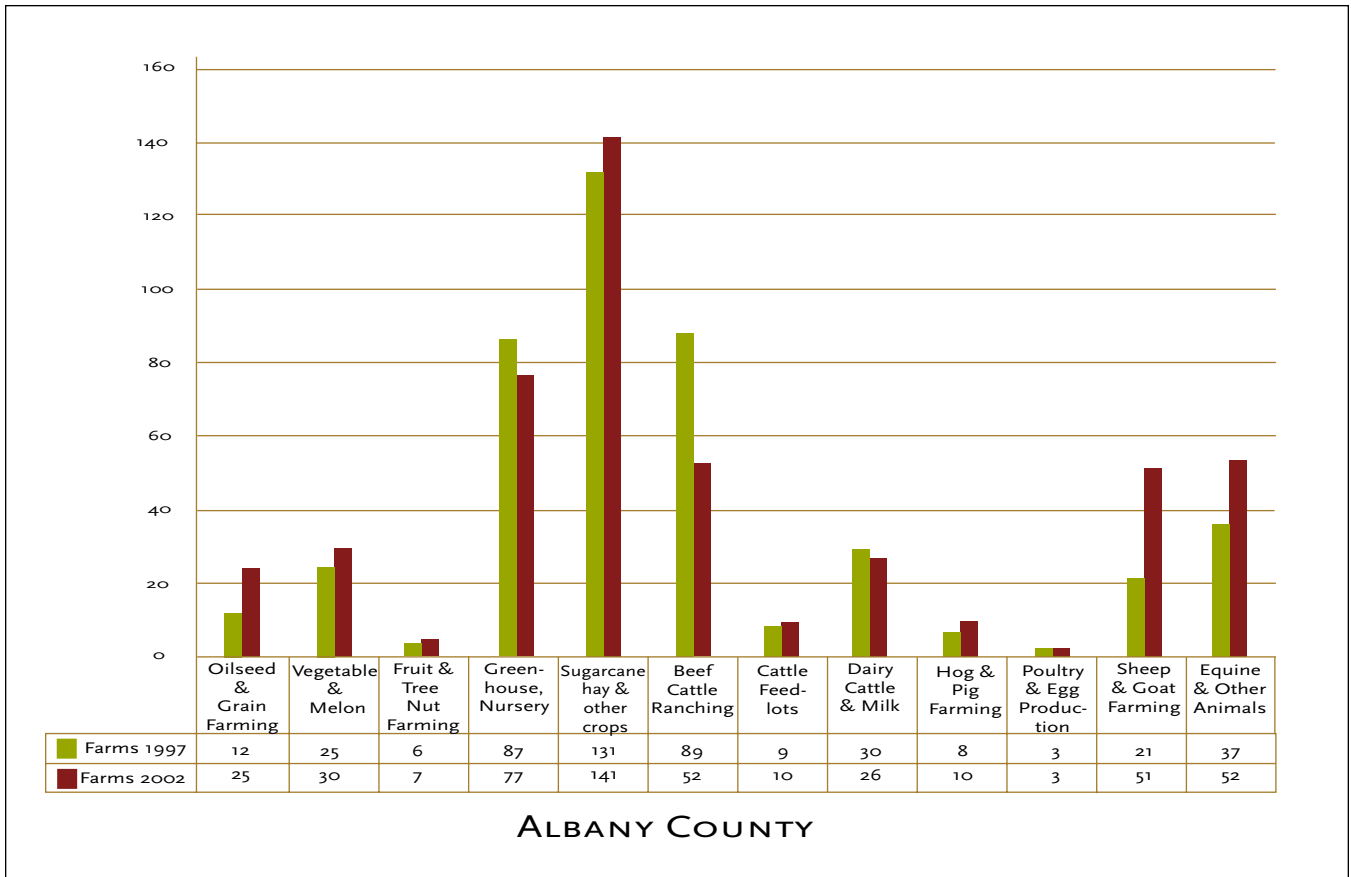


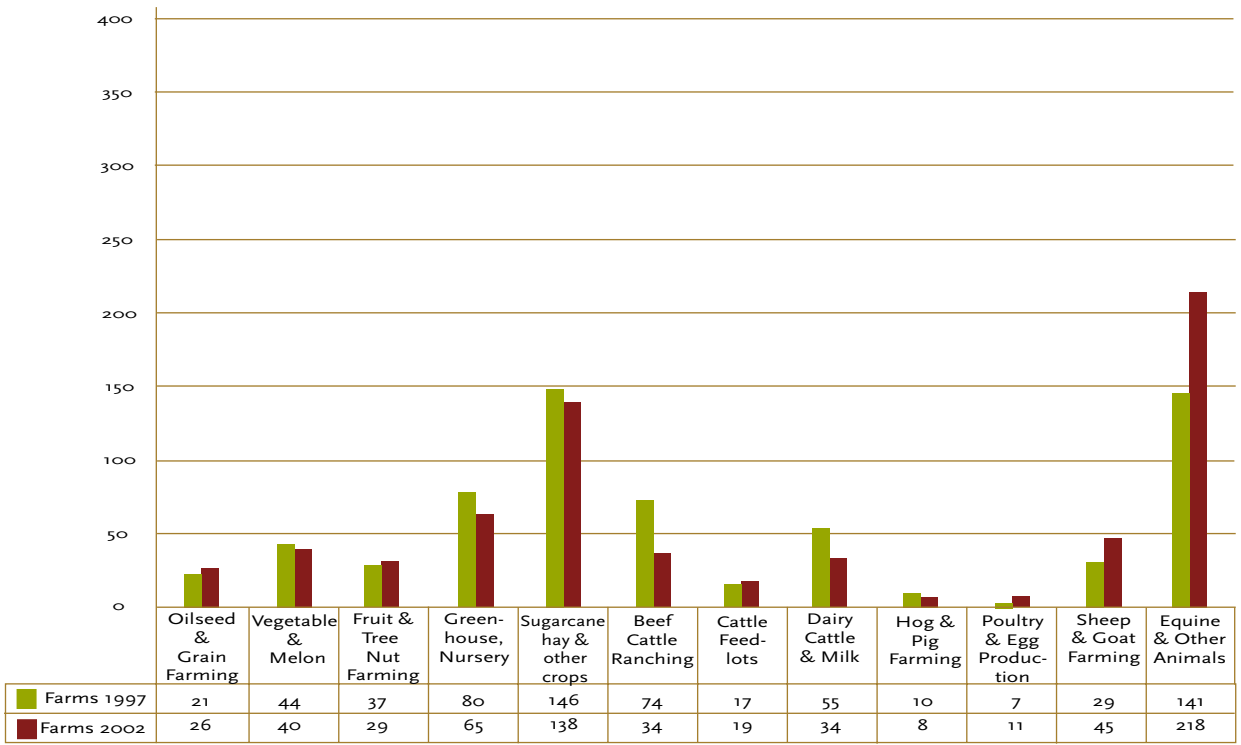




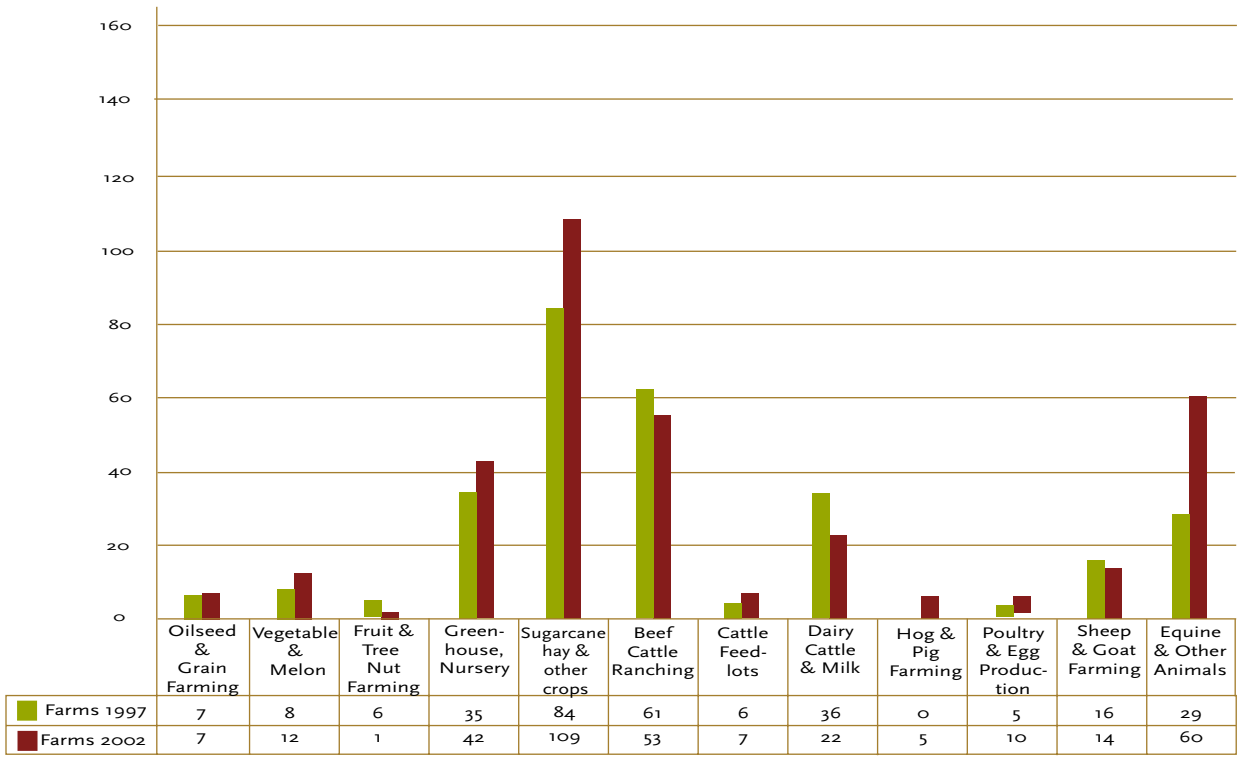
APPENDIX C:

Changes in Number of Farms Engaged in Production for Selected Counties

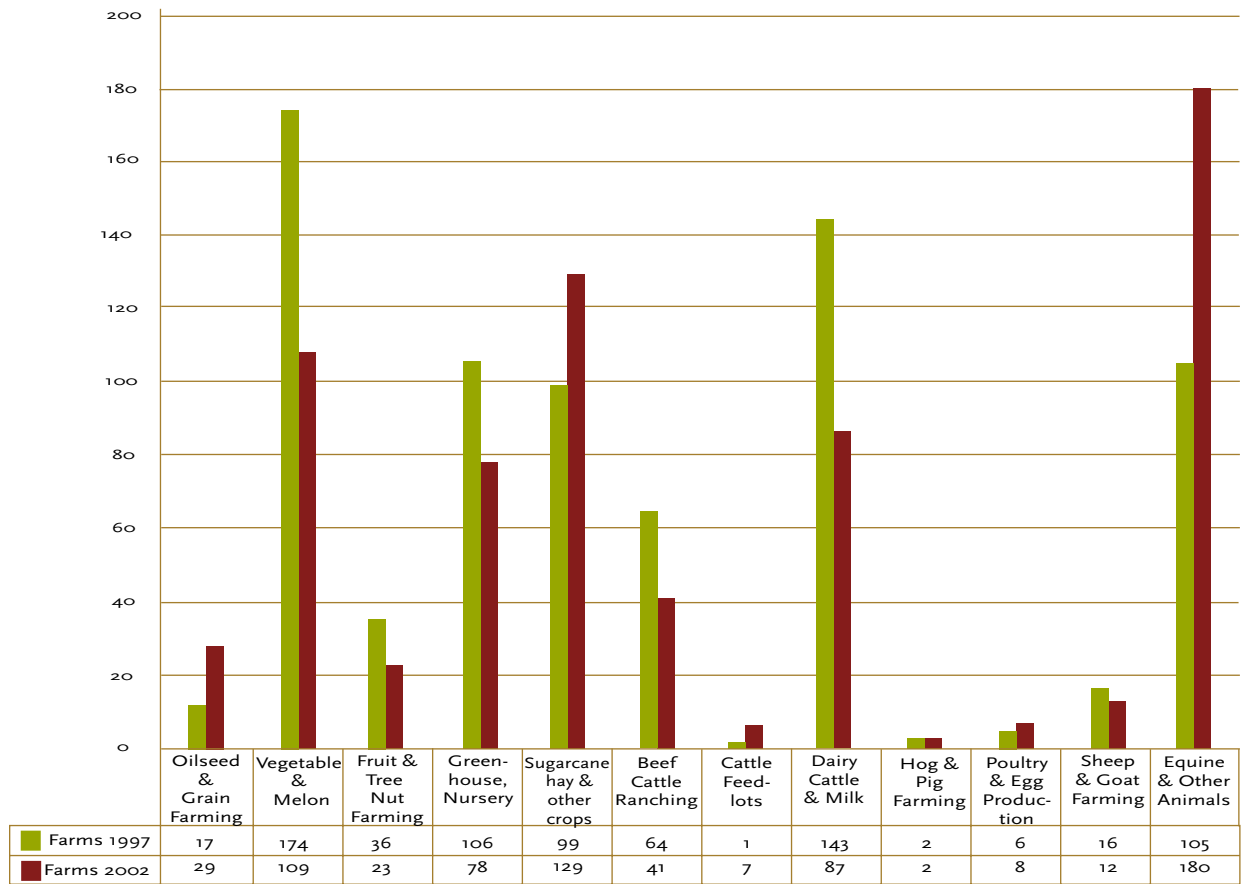




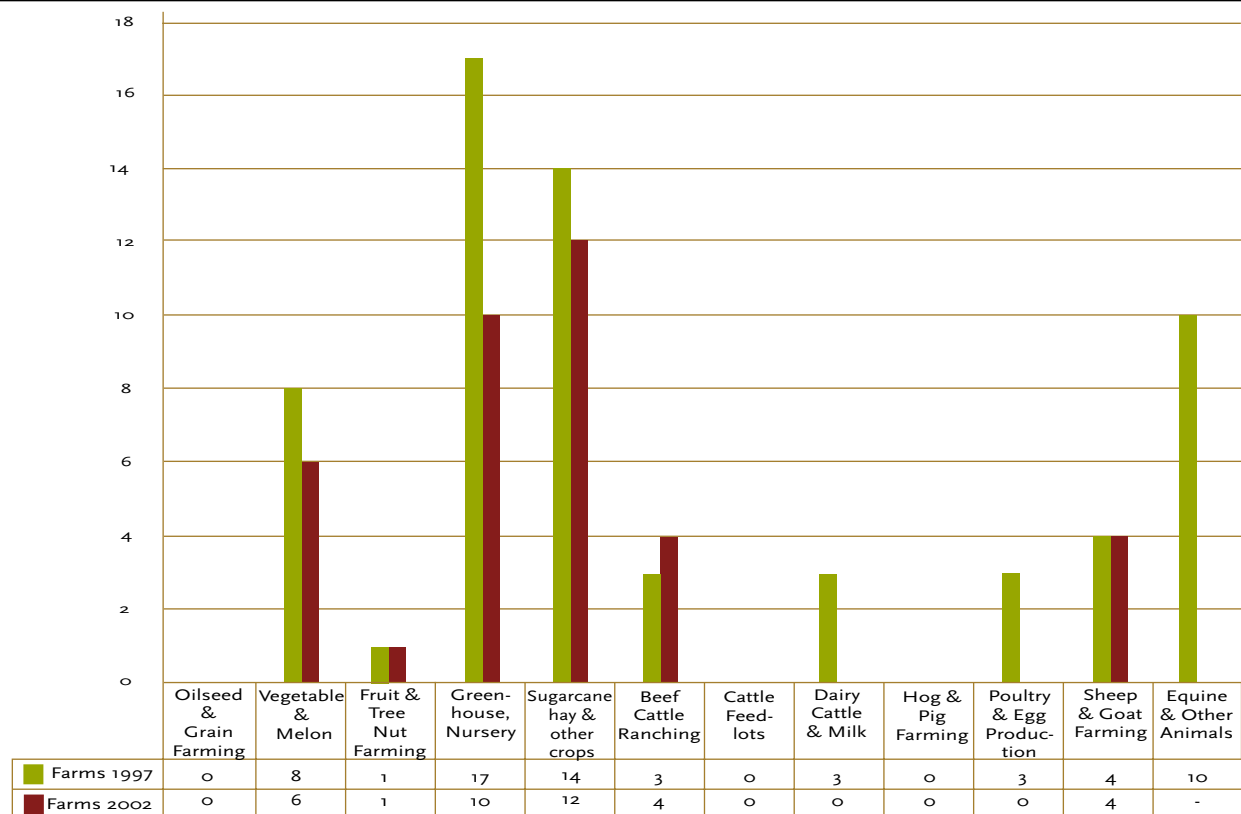
DUTCHESS COUNTY



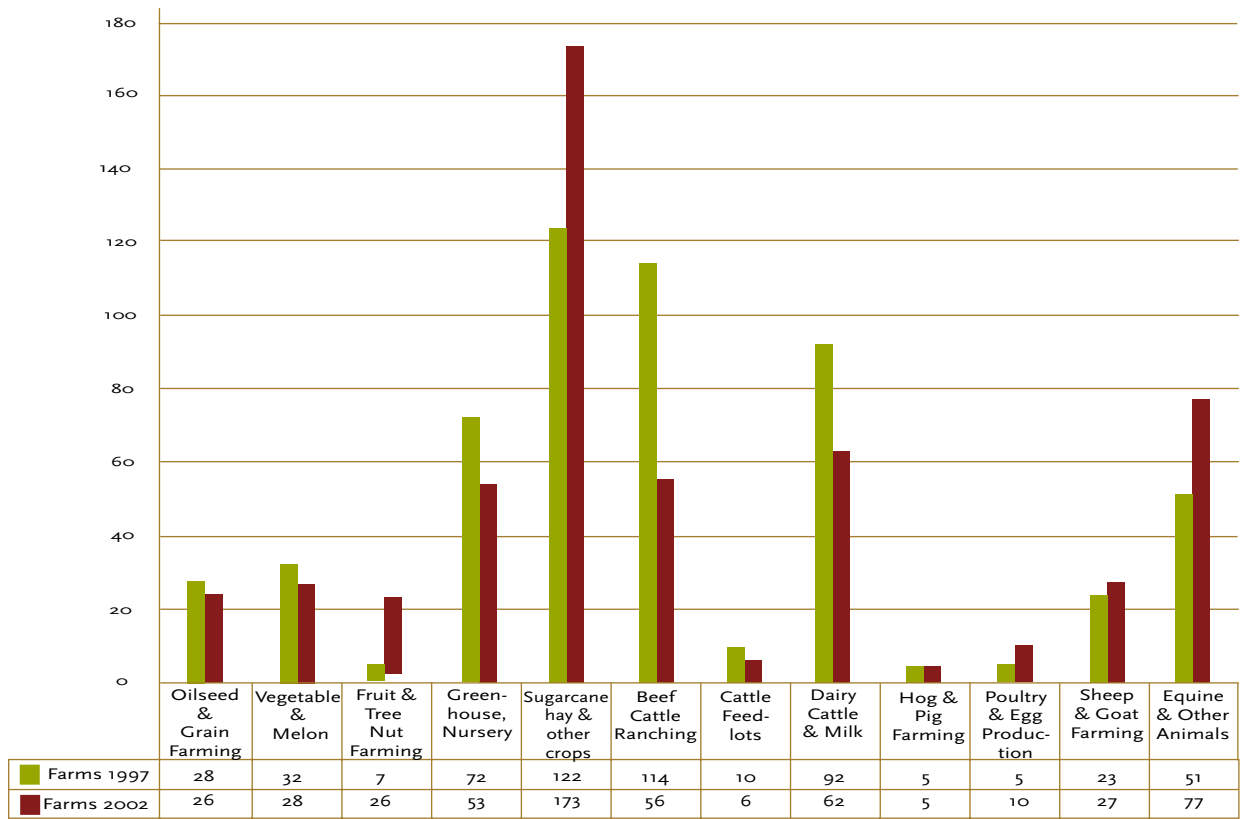
GREENE COUNTY



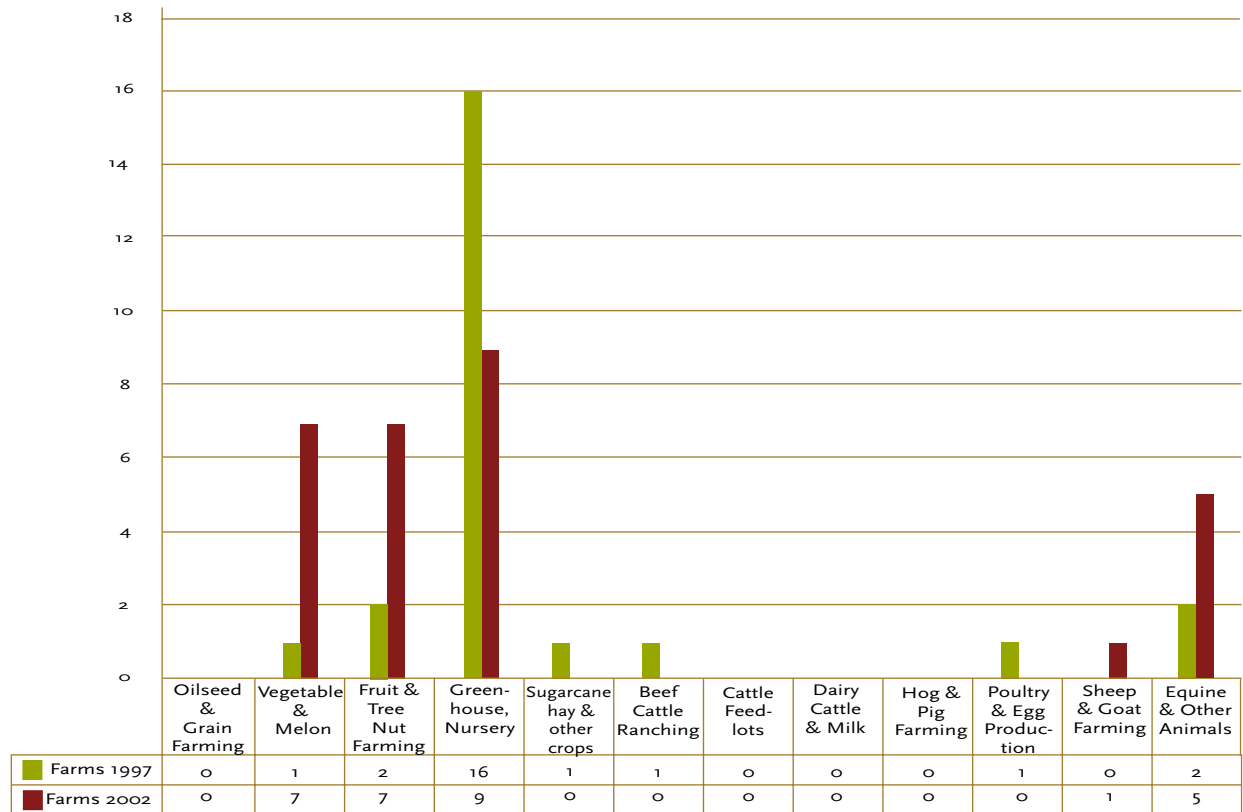
ORANGE COUNTY



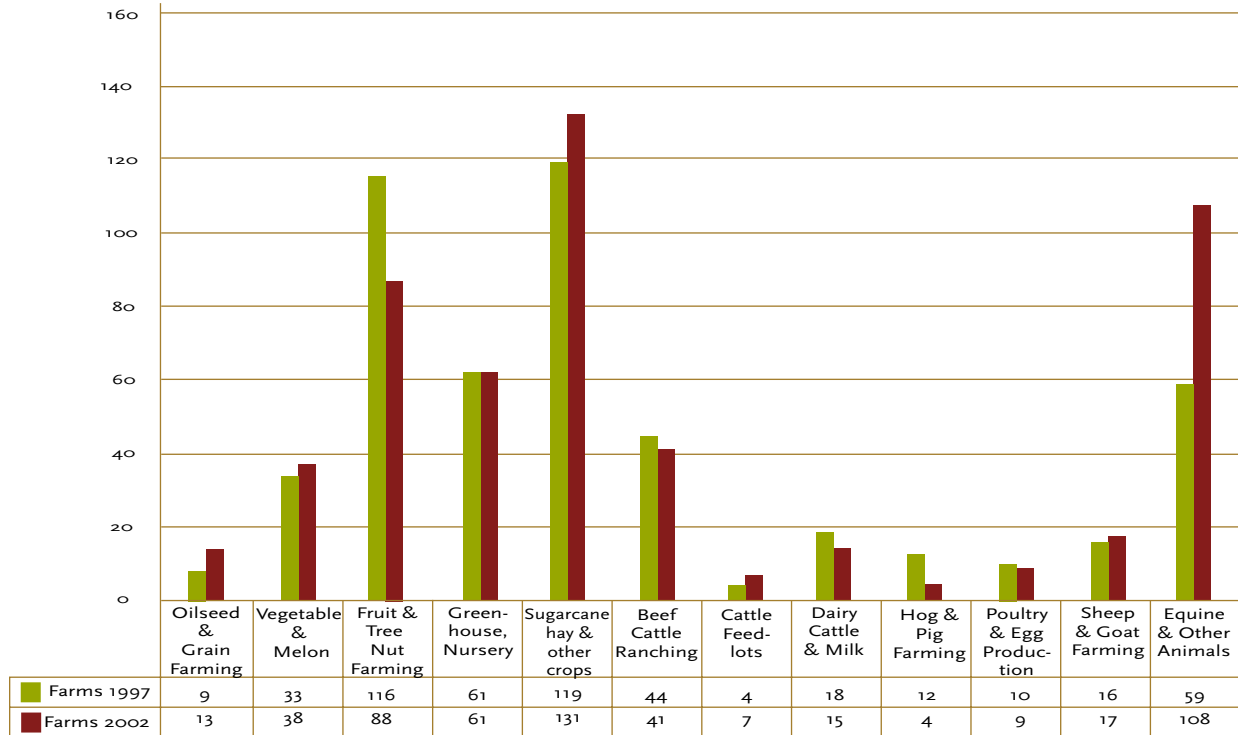
PUTNAM COUNTY



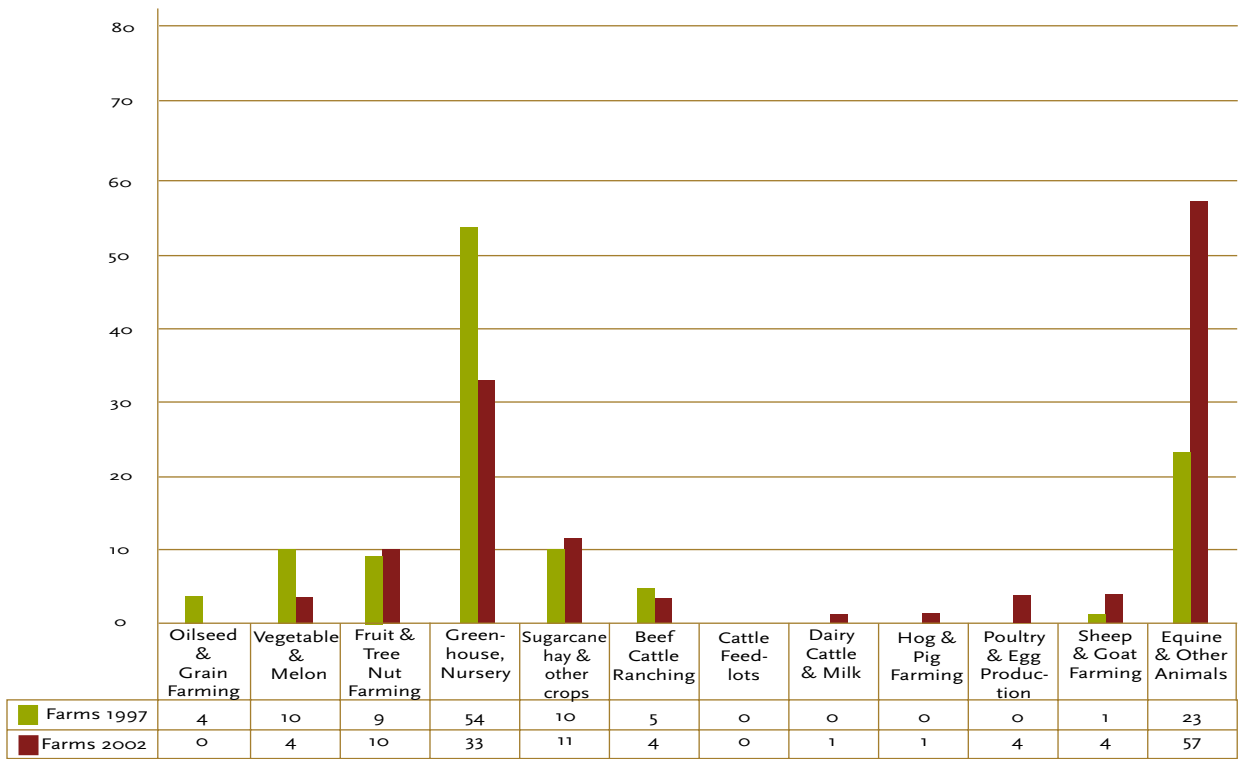
RENSSELAER COUNTY



ROCKLAND COUNTY



ULSTER COUNTY



WESTCHESTER COUNTY