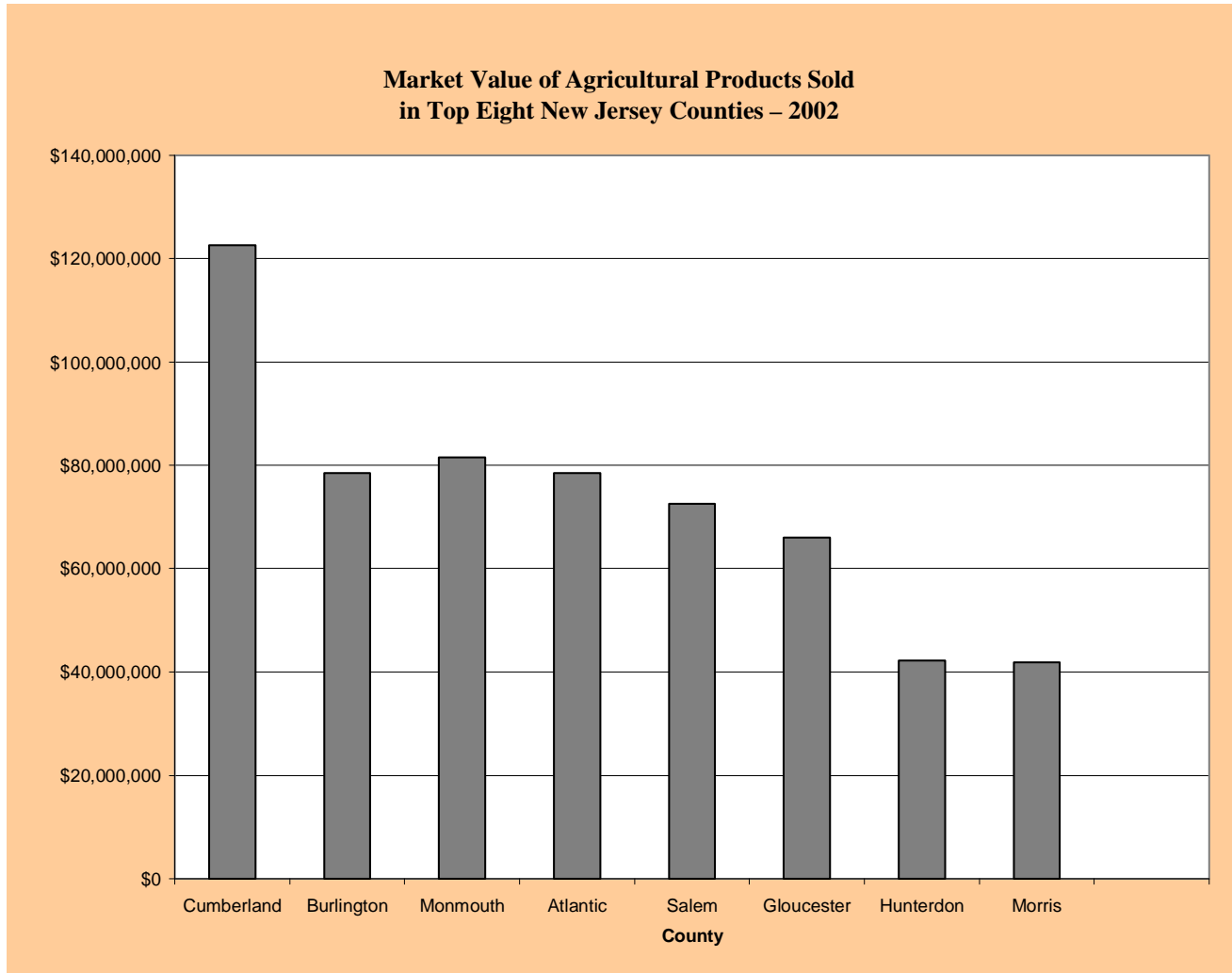


## II. MORRIS COUNTY'S AGRICULTURAL INDUSTRY

### A. TRENDS IN MARKET VALUE OF AGRICULTURAL PRODUCTS

Agriculture is an important part of Morris County's economy and a major contributor to the state's and country's farming industry. Despite ranking 13<sup>th</sup> in the state for land in farmland, the US Census of Agriculture indicates that in 2002, Morris County ranked 8<sup>th</sup> in the state in the market value of agricultural products sold with \$41,879,000 in sales.



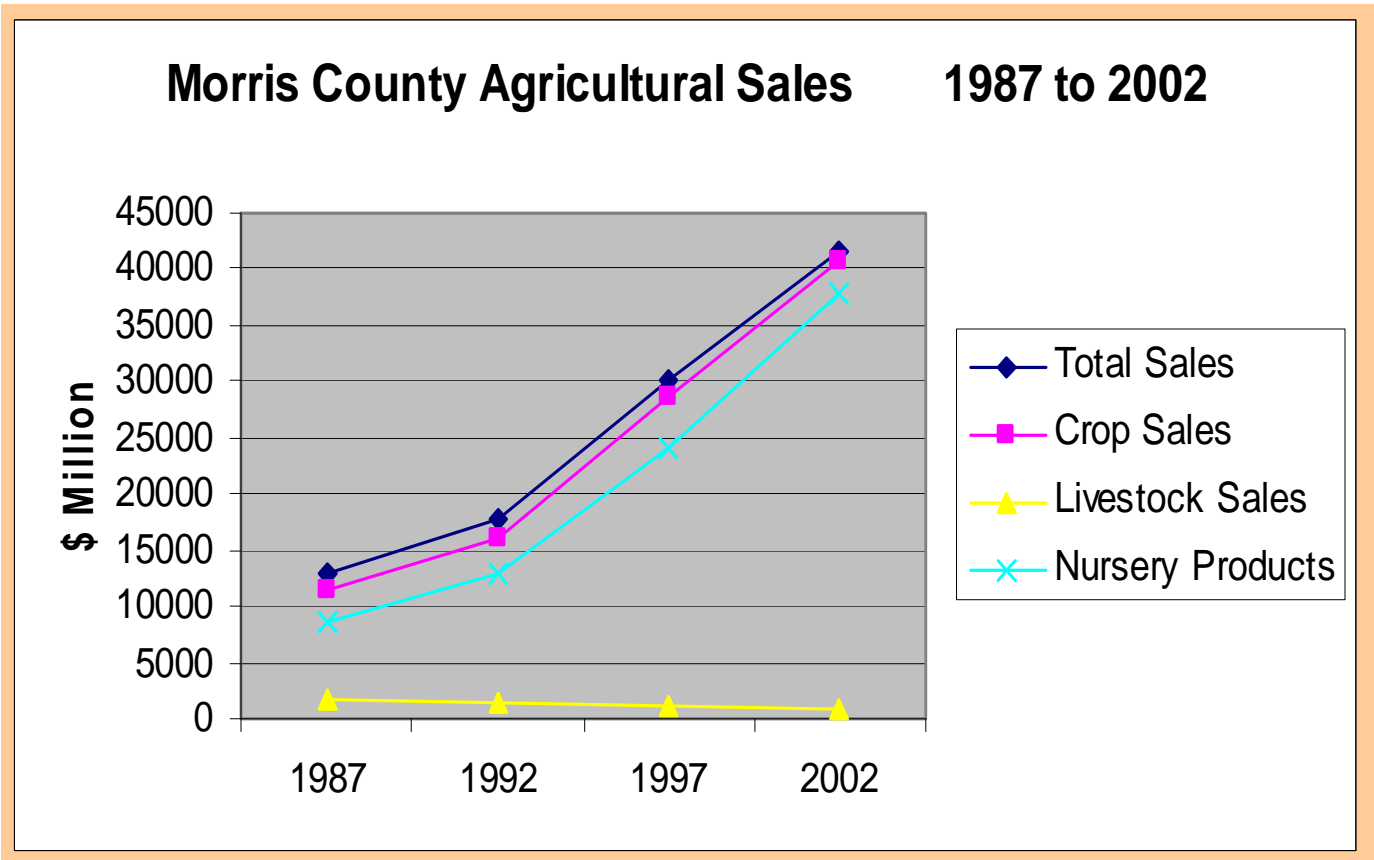
From a purely economic standpoint Morris County is a powerhouse in the market, with a 20 year trend of dramatically increasing sales. Since 1987, when the County had sales of \$13.016 million, we have experienced 219% growth overall in Total Agricultural Products sold.

*Source: US Department of Agriculture. 2002 Census of Agriculture.*

Since overall market values are not compiled annually at the County level, but rather reported every five years as part of the National Census of Agriculture, the most recent information we have is from 2002. The next Census report will be available at the beginning of 2008.

The Census of Agriculture separate agricultural activities into two distinct categories:

- Crops, including nursery and greenhouse products (Nursery Products are highlighted)
- Livestock, Poultry and their products.



Source: USDA, Census of Agriculture - Morris County Profile

## B. CROP / PRODUCTION TRENDS OVER THE LAST 20 YEARS

### STATE OVERVIEW

In response to economic changes and market demands, agricultural production in Morris County has been moving away from grain crops to high value crops such as nursery stock, as well as agritourism, pick-your-own operations, farmers markets and equine production.

Horticulture is the leading New Jersey commodity group (SADC's "Strategies to Retain Agriculture" presentation, March 2, 2007) with nursery, greenhouse and sod products totaling

\$297 million annually.

The equine industry, comprised of activities such as breeding, boarding, training, riding, standard bred and thoroughbred racing, is very strong in New Jersey. There are over 49,000 horses within the industry (more than in Kentucky). The industry contributes \$600 million annually to the state economy.

Fruit and vegetable production is a \$275 million sector of the New Jersey agricultural economy. New Jersey is one of the top 10 producing states of 15 different commodities. New Jersey farmers grow over 150 varieties of fruits and vegetables. “Jersey Fresh” (<http://www.state.nj.us/agriculture/divisions/md/prog/jerseyfresh.html>) is an advertising and promotional program, which helps farmers inform consumers about the availability and variety of fruits and vegetables grown in New Jersey. The program has utilized billboards, television and print ads, and colorful print materials to remind consumers about the availability of locally grown products.

Wine production has a 200-year-old tradition in New Jersey. One million gallons of wine are produced in New Jersey annually (5<sup>th</sup> in the United States). There are 26 wineries in 10 counties.

Field crops cover 320,000 acres in New Jersey with an economic value of \$86 million. Economic assistance may be available for new crop varieties (such as edible soybeans), ethanol production, and organic field crops.

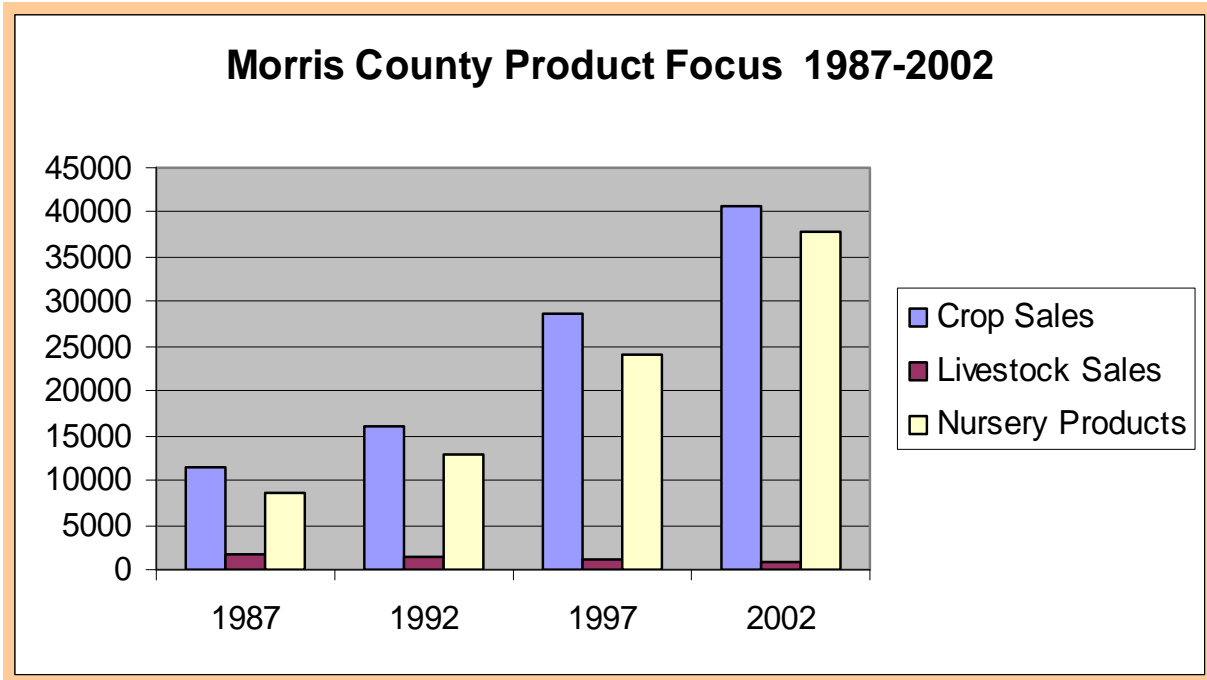
Organic farming is strong in New Jersey. It is the fastest growing and profitable segment of agriculture in the United States. NJ has 54 certified organic growers who produce organic crops on 2,500 acres.

Community farmers markets provide an important link for farmers and consumers. There are over 70 markets in 65 New Jersey communities. Consumers’ interest in purchasing fresh produce directly from farms has been growing steadily. In addition, many farms within the county also have seasonal farm markets enabling farmers to sell their products at retail prices.

Agritourism is an important source of income for many New Jersey farmers who provide activities such as corn mazes, pumpkin picking, pick-your-own operations, hay wagon rides, etc. Agritourism activities provide a needed marketing opportunity to farmers.

## **MORRIS COUNTY OVERVIEW**

As the chart below indicates, Morris County has successfully adapted to the needs of the marketplace, transitioning to products that are in high demand locally, while providing the individual farmer with a viable business enterprise. Farmers in Morris County have steadily shifted their product focus from Livestock to Nursery Products over the past 20 years.

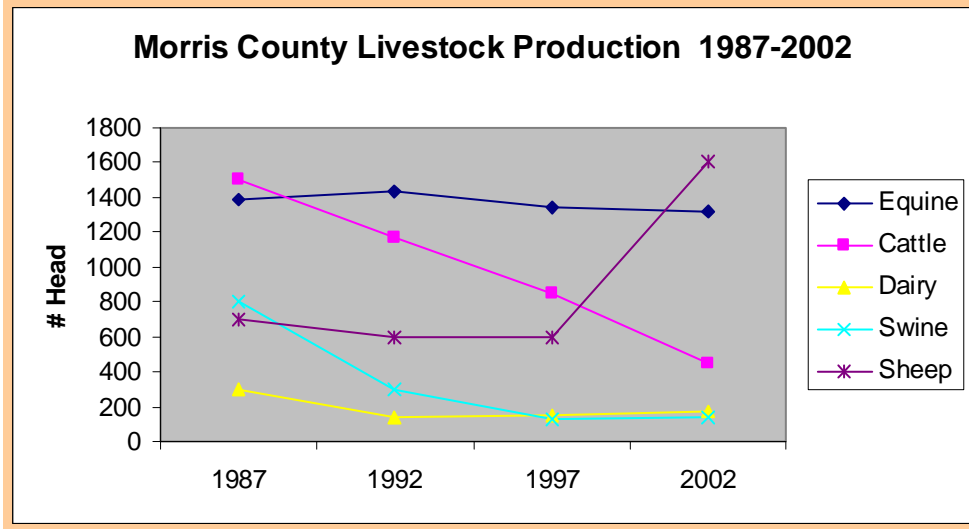


Source: USDA, Census of Agriculture - Morris County Profile

When comparing counties across the state, Morris County increased its state ranking from 5<sup>th</sup> in 1997 to 4<sup>th</sup> in 2002 in the value of nursery, greenhouse, floriculture, and sod sales. Morris County is also ranked 6<sup>th</sup> in the state in the value of horse and pony sales.

As development has encroached upon the agricultural industry in Morris County, and land has become harder to find at an much higher price, farmers have moved away from land intensive livestock industries like cattle, dairy and swine, and toward livestock with a higher rate of return per acre like equine and sheep, the latter of which provide a trifecta of market products: wool, milk/cheese and meat. The chart below represents the twenty year trend in this sector.

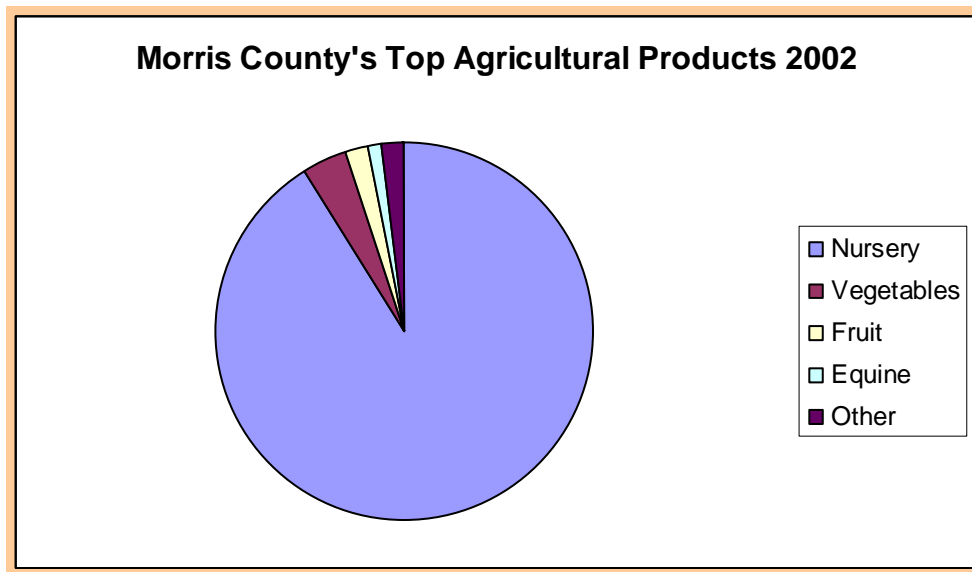
(Please note that Poultry trends have not been represented due to differences between Census data criteria)



Source: USDA, Census of Agriculture - Morris County Profile

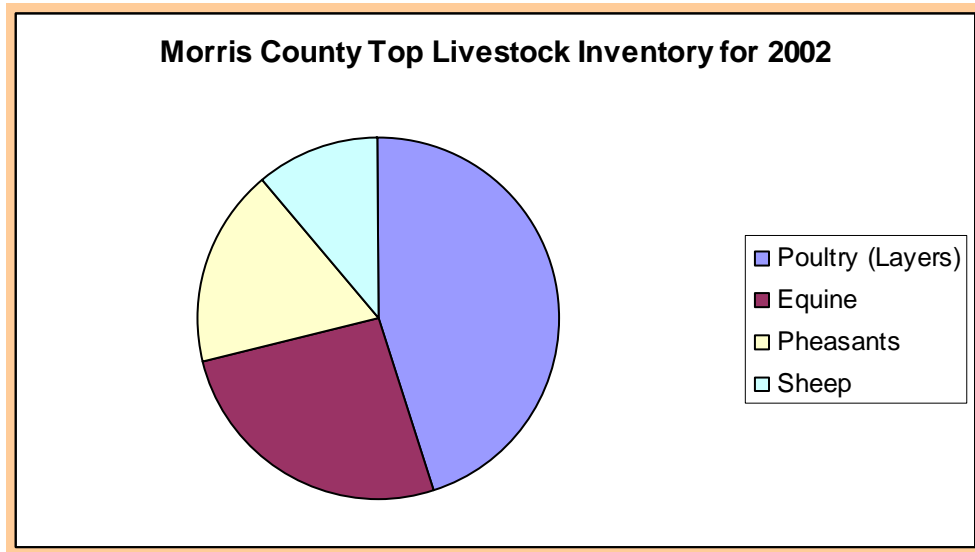
Likewise, in the Crop Production segment of farming, the choice has been made to focus on higher ticker items, with a shorter growing period. Acreage devoted to Nursery products and Fruit Orchards has remained steady, while there have been significant decreases land used for Hay and Corn (for grain) production.

Based on 2002 Census of Agriculture, Morris County’s agricultural products yielded total sales of \$41.879 million for County farmers. A closer look reveals that 98% of these sales were derived from 4 industries: Nursery, greenhouse, floriculture and sod products; Vegetable and melons; Fruit, tree nuts and berries; equine industry



Source: 2002 Census of Agriculture – Morris County Profile

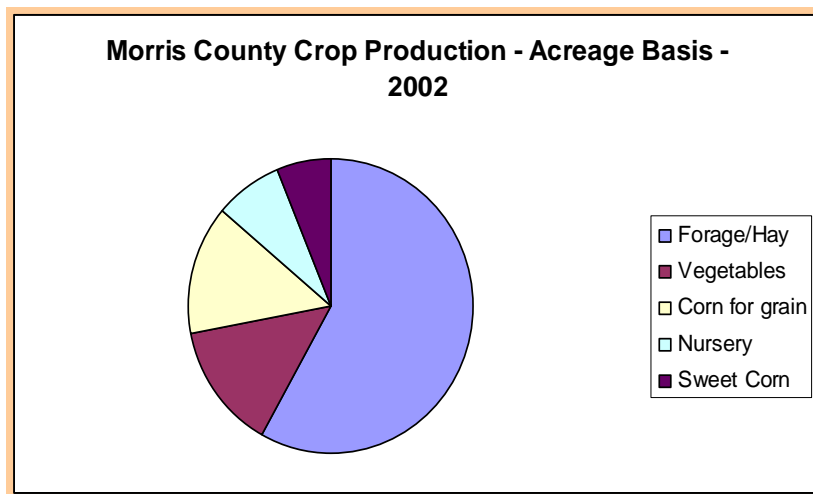
An analysis of the top Livestock Inventory Items, on a per animal basis, reveals the following industries dominating this segment of farming in Morris County: Layers 20 weeks or older; Horses and ponies; Pheasants; Sheep and lamb. The specific breakdown is represent in the chart below.



Source: 2002 Census of Agriculture – Morris County Profile

When crop is evaluated on a *acreage utilized* basis, the top five agricultural products are:

1. Forage – including hay, silage and greenchop – 58%
2. All Vegetables harvested (ex-sweet corn) – 14%
3. Corn for grain – 14%
4. Nursery stock – 8%
5. Sweet corn – 6%



Source: 2002 Census of Agriculture – Morris County Profile

Agriculture provides benefits including food production, employment opportunities, and net cash returns. It also provides many indirect benefits that contribute to the high quality of life enjoyed by Morris County’s residents. These benefits include recreational, educational and agritourism opportunities, historic heritage, scenic views that enhance the aesthetic value of communities, groundwater recharge areas and wildlife habitat areas among others.

According to the American Farmland Trust, farmland supports local government budgets. While residential development generates more dollars in tax revenue than privately owned farmland, it imposes direct and indirect costs to communities. Direct costs include services such as schools, municipal utilities and roads, while indirect costs include those that result from the loss of agricultural lands and open space. Privately owned farmland, on the other hand, generates less revenue, but requires little infrastructure and services (American Farmland Trust, 2002). According to Cost of Community Services studies (COCS) performed by the American Farmland Trust, “owners of farm, forest and open lands pay more in local tax revenues than it costs local government to provide services to their properties. Residential land uses, in contrast, are a net drain on municipal coffers: It costs local governments more to provide services to homeowners than residential landowners pay in property taxes” (American Farmland Trust, 2001).

The United States Census of Agriculture provides comprehensive data about the trends in market value of New Jersey’s agricultural products.

### **Value of Sales by Commodity Group**

Commodity Group	Sales (\$1,000)	Percent of Sales
<b>Crops Including Nursery and Greenhouse</b>	<b>40,842</b>	
• Nursery, greenhouse, floriculture and sod	37,868	90.42
• Vegetables, melons, potatoes, and sweet potatoes	1,642	3.92
• Fruits, tree nuts, and berries	622	1.49
• Other crops and hay	387	0.92
• Grains, oilseeds, dry beans and dry peas	247	0.59
• Cut Christmas trees and short rotation woody crops	75	0.18
<b>Livestock, Poultry and their Products</b>	<b>1,037</b>	
• Horses, ponies, mules, burros, and donkeys	535	1.28
• Poultry and eggs	131	0.31
• Cattle and Calves	127	0.30
• Hogs and pigs	10	0.02
<b>Total Sales</b>	<b>41,879<sup>(1)</sup></b>	

Source: US Department of Agriculture. 2002 Census of Agriculture.

Notes: 1 - Equivalent to Total value of agricultural products sold which takes into account additional commodity groups in which data could not be disclosed. Percentages based on this total value.

## C. SUPPORT SERVICES WITHIN MARKET REGION

Morris County’s agricultural industry relies on local and regional agriculture-related businesses and farmers’ markets. Farmers need access to supply stores for necessary agricultural products, such as equipment parts and seeds. Farmers also rely on local hardware stores as sources of agricultural tools and equipment. A list of New Jersey’s agricultural suppliers is provided via the “Green Pages (An Agricultural Resource Guide)” by the Rutgers Cooperative Extension of Salem County and is available on the web at <http://saalem.rutgers.edu/greenpages/index.html>. A few local suppliers are highlighted below.

Agriculture-related businesses within Morris County include: tractor equipment & supplies, irrigation systems & equipment, saddlery companies and commercial fencing supplies & materials. According to Local.com, there are 91 of these agriculture-related businesses within 15 miles of the farming community in southern Morris County. The distribution is:

- Saddlery – 4
- Irrigation Systems and Equipment – 11
- Tractor Equipment and Supplies – 12
- Commercial Fencing and Materials - 91

Local farmers have voiced concerns that the supply of local agricultural service suppliers is dwindling resulting in a reliance on other areas to meet their needs. Many have reported that travel to Pennsylvania is often necessary to obtain services no longer found in and around Morris County. With increasing fuel prices, transportation to these areas can be costly resulting in a decrease in profitability. Some farmers have stated that it would be inherently beneficial to the agricultural community if preserved farm owners were permitted to provide certain services on their land including but not limited to equipment repair.

**Sample of Agricultural Service Suppliers**

Supplier	Type	Town
Barn Works	Horse fencing, pole barns, run-in sheds, barn repair, etc.	Hopatcong, NJ
Country Feed & Grain	Horse feeds	Haskell, NJ
Crop Production Services		Pittstown
D & R Equipment	Equipment	Ringoes, NJ
4-T’s Farm	Equipment	Flemington, NJ
Parker Landscaping Construction Inc.	Services for equestrian farms, fence and gate repairs, tree removal	Califon, NJ
Penwell Mills	Feed	Port Murray, NJ
Tractor Supply	Equipment and Feeds	Flanders, NJ

However, many necessary agricultural services are not found in or near Morris County. This necessitates the farmer being more self-reliant for repairs or reliant on mail order for supplies. This has potential shortcomings with shipping costs and delays, which can impact the farmer’s profitability.



### **Skylands Region Agritourism Brochure:**

In an effort to market agriculture/farm based activities to the public, and thereby increase farm profitability, agricultural organizations in the five counties that comprise the Skylands region (Hunterdon, Morris, Somerset, Sussex and Warren) developed the Skylands Region Agritourism Brochure. Involved in the project were County Agriculture Development Boards, County Boards of Agriculture, Rutgers Cooperative Extension and the New Jersey Farm Bureau. The regional Agritourism brochure provides detailed information about farms that are open to the public and offer farm based recreational activities such as harvest tours, hay rides, pick your own, farm markets and others. The brochure is handed-out at a variety of in-state and out-of-state trade shows and exhibitions, and become part of the tourist information packet distributed by the Skylands of NJ Tourism Council, Inc. The brochure was originally distributed in 2002. It has been revised once and is currently in the process of a third revision.

### **Farm Markets**

#### *Farm Markets/Stands:*

Many Morris County farms operate seasonal and/or year-round farm markets or farm stands, which provide them with a direct link to their customers. Below is a listing of farm markets/stands in Morris County:

<b>Farm</b>	<b>Address</b>	<b>Phone</b>
Alstede Farms	84 County Route 513 (old Rt. 24); Chester	(908) 879-7189
Ashley Farms	25 Hillside Ave.; Flanders	(973) 584-7578
Bader Farm	290 Change Bridge Rd.; Pine Brook	(973) 227-0294
Borinski Farms	115 Boonton Turnpike (Rt. 202), Lincoln Park	(973) 694-9216
C Stephens Farms	145 Flanders-Drakeston Rd., Mt. Olive Twp.	(973) 584-4782
Cedar Gate Farm	102-104 Parks Rd., Denville	(973) 586-3131
Conklin Farm	Vreeland Ave. & River Rd.; Montville	(973) 334-4358
Degage Gardens	868 Greenpond Road, Rockaway	(973) 586-4584
Greenway Flowers & Greenhouses	441 Schooley's Mtn. Rd.; Hackettstown	(908) 850-0700
Hacklebarney Farm Cider Mill	104 State Park Rd.; Chester	(908) 879-6593
Hamilton Farms Greenhouses & Farm Market	130 Old Denville Rd. Boonton Twp.	(973) 334-6528
Hillview Farms	223 Meyersville Rd.; Gillette	(908) 647-0957
Knothe Farm	Millbrook Ave.	(973) 895-7383
Lindeken Farms	Rt. 15 & Berkshire Valley Rd., Wharton	(973) 366-5305

Lines Farm	279 Eyland Ave., Succasunna	(973) 584-2778
M & D Loth Farms	316 Fairmount Rd., Long Valley	(908) 876-3656
Miller's Hill Farm	10 Combs Ave.; Mendham/Randolph Twp.	(973)543-1103
Orchard Hill Growers	73 Jacksonville Rd., Towaco	(973) 335-6626
Ort Farms	25 Bartley Rd.; Long Valley	(908) 876-3351
Parks Farms	Rt. 24, Chester	(908) 879-5509
Pettersen Farm	27 Birch Rd., Kinnelon	(973) 838-1120
Riamede Farm	122 Oakdale Rd.; Chester	(908) 879-5353
Stony Hill Farm Market	15 North Rd.; Chester	(908) 879-2908
Stony Hill Gardens	8 Rt. 24; Chester	(908) 879-2696
Sudol's Farm	76 River Rd., Montville	(973) 299-1784
Sun High Orchard	19 Canfield Ave.; Randolph	(973) 584-4734
Union Hill Farms	25 Cooper Rd.; Denville	(973) 366-0440
Valley Shepherd Creamery	50 Fairmount Road, Long Valley	(908) 876-3200
Wightman's Farms	Rt. 202, 1111 Mt. Kemble Ave.; Morristown	(973) 425-9819
Winterberry Farms	118 Parker Rd., Chester	(908) 879-7686

Source: <http://www.state.nj.us/cgi-bin/agriculture/jerseyfresh/search.pl>

### *Community Farmers Markets:*

Due to the growing consumer demand in fresh locally grown produce, community farmers markets are becoming increasingly popular. New Jersey's consumers value direct contact with the farmers who produce the foods they consume. According to the Department of Agriculture, more than seventy farmers markets operated in New Jersey during the last growing season (<http://www.state.nj.us/agriculture/divisions/md/prog/communityfarmers.html>).

Farmers markets in Morris County provide another valuable service for Morris County's farmers. They attract large numbers of county, state and out-of-state individual to the County who are looking to buy local produce. There is a high demand for local produce among New Jersey residents, and farmers markets create a direct link between Morris County's farmers and their potential customers. Farmers also sell "value added" products that add to the farmers' income. Below is a listing of the farmers markets that currently operate in Morris County:

<b>Farmers Market</b>	<b>Address</b>	<b>Open</b>
Boonton	Upper Plane Street Parking Lot	June 9 - Sept. 29; Saturdays, 9 am - 1 pm
Chatham Borough	Chatham Train Station (RR Plaza South @ Fairmount Ave)	June 30 - Oct. 7, Saturdays, 8am - 1pm
East Hanover	Eagle Rock & Ridgedale Avenue (Liker's Park)	June 18 - Oct. 29, Mondays, 12 pm - 6 pm
Madison (Fall)	Rosedale & Main Street (Madison Community Pool)	Sept. 6 - Oct. 25, Thursdays, 2 pm - 7 pm
Madison (Summer)	Ridgedale & Park Avenue (Madison High School)	June 28 - Aug. 30, Thursdays, 2 pm - 7 pm
Morris Plains	Speedwell Avenue Extension (Off Rt. 202)	June 23 - Oct. 6, Saturdays, 9 am - 2 pm
Morristown	Spring Street & Morris Avenue (Public Parking Lot #10, Dumont Place, behind Post Office)	June 17 - Oct. 28, Sundays, 8:30 am - 2 pm
Netcong	Main Street & Rt. 46 (Train Station)	June 16 - Oct.13, Saturdays, 9 am - 2 pm

Source: <http://www.state.nj.us/cgi-bin/agriculture/jerseyfresh/search.pl>

In addition, Morris County's farmers also sell at markets outside of Morris County. For example, a Washington Township sheep farmer sells his sheep's milk products at farmers markets in New Jersey and in New York City.

Morris County farmers also rely on the services of private organizations and public agencies such as the Morris County Board of Agriculture and the Morris County Agriculture Development Board, the New Jersey Farm Bureau, Rutgers Cooperative Extension of Morris County, Morris Soil Conservation District, and the Natural Resource Conservation Service, among others. These organizations offer a variety of services including planning assistance, financial aid, and marketing support.

## **D. OTHER AGRICULTURAL RELATED INDUSTRIES**

Agriculture-related businesses within Morris County include: tractor equipment & supplies, irrigation systems & equipment, saddlery companies and commercial fencing supplies & materials. According to Local.com, there are 91 of these agriculture-related businesses within 15 miles of the farming community in southern Morris County. The distribution is:

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- Commercial Fencing and Materials - 91

To support agriculture and rural economic development, the NJDA provides technical support services to existing as well as new agribusinesses in the Garden State including food manufacturers that add value to agricultural commodities. For additional information, interested individuals may contact Ms. Karen Kritz at (609) 984-2506 or [Karen.Kritz@ag.state.nj.us](mailto:Karen.Kritz@ag.state.nj.us). (source: <http://www.state.nj.us/agriculture/divisions/md/prog/agricultureeconomic.html#3>).