Texas Rural Farmworker Housing Analysis

Prepared For

Texas Department of Housing and Community Affairs
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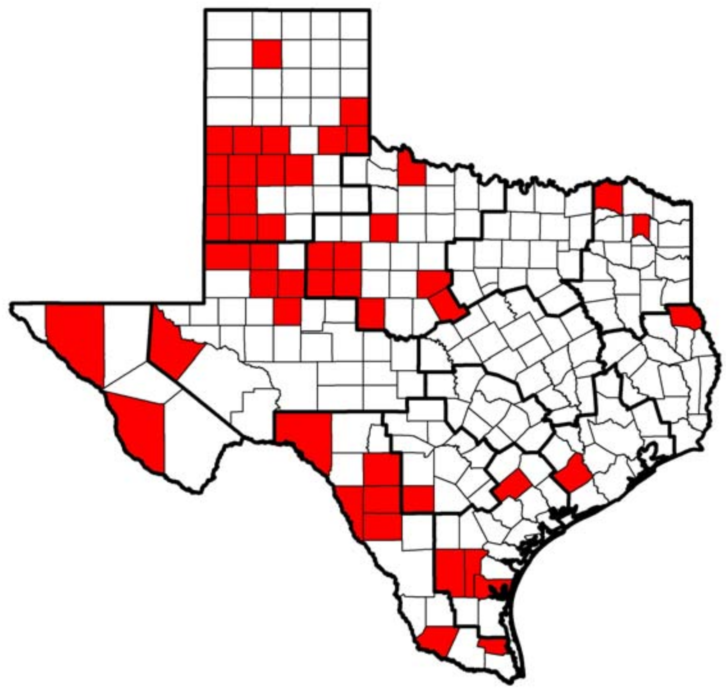

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I. INTRODUCTION

A. OVERVIEW OF OBJECTIVES

The purpose of this report is to present and evaluate migrant and seasonal farmworker demographics and housing characteristics in specific rural Texas counties and to ultimately determine the affordable housing needs of Texas farmworkers. This study conforms to the specific work elements as outlined in the Texas Department of Community Affairs' (TDHCA) Request for Proposal (RFP) # 332-RFP11-1005.

B. WORK ELEMENTS/SCOPE OF WORK

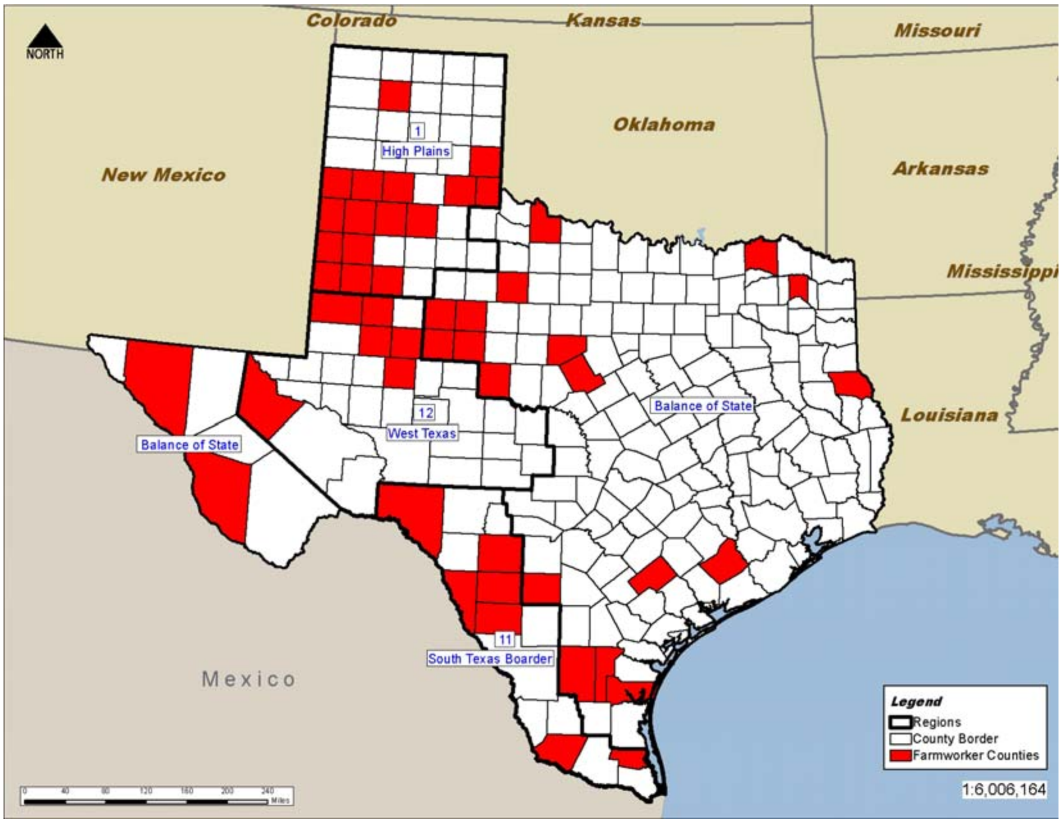
For the purposes of this analysis, the following definition of farmworkers has been used: *"Any person (and the family of such person) who received a substantial portion of his or her income from primary production of agricultural or aquacultural commodities or the handling of agricultural or aquacultural commodities in the unprocessed stage, or the processing of agricultural or aquacultural commodities, without respect to the source of employment."*

As required by and in direct response to TDHCA's RFP, this analysis is limited to counties that contain more than 1,000 "Migrant/Seasonal Farmworkers and Non-Farmworkers as determined from the September 2000 *Migrant and Seasonal Farmworker Enumeration Profile Study of Texas* (MSFW Enumeration Profile). Based on the MSFW Enumeration Profile, 49 counties meet TDHCA's definition of a rural farmworker county. This analysis was further limited to TDHCA service regions 1, 11, 12 and Balance of State.

The following table lists each study county by TDHCA service region:

Rural Counties with 1,000+ Farmworkers by TDHCA Region			
Region 1			
Bailey	Collingsworth	Hockley	Parmer
Castro	Floyd	Lamb	Swisher
Childress	Hale	Lynn	Terry
Cochran	Hall	Moore	Yoakum
Region 11			
Dimmit	Starr	Val Verde	Zavala
Maverick	Uvalde	Willacy	
Region 12			
Dawson	Glasscock	Martin	-
Gaines	Howard	Reeves	-
Balance of State			
Comanche	Frio	Lamar	Scurry
DeWitt	Haskell	Mitchell	Shelby
Duval	Hudspeth	Nolan	Titus
Eastland	Jim Wells	Presidio	Wharton
Fisher	Kleberg	Runnels	Wilbarger

A map delineating the four study regions and the selected farmworker counties (shaded in red) follows.



Due to the variety of farmworker data sources and the variation of data collected, methodologies used, and periods evaluated, there is limited modern farmworker data available on the county level from which we can use for estimating demand. As a result, Bowen National Research has used data from a variety of nationally recognized sources (MSFW Enumeration Profile, 2007 Census of Agriculture, U.S. Department of Labor Statistics and the National Agricultural Workers Survey) and incorporated the data into a farmworker estimate methodology established by the Shimberg Center for Housing Studies at the University of Florida. Estimating the number of farmworkers per county is based on reported wages paid within a county for agriculture and agriculture-related work. Data from other secondary sources cited above is then used to refine the estimates and to determine the number of seasonal and migrant farmworkers, accompanied and unaccompanied farmworkers, and farmworker incomes. The specific methodology used is discussed in greater detail in Section III of this report.

County and regional level economic data is presented and evaluated for each study area. Economic data includes total overall employment, unemployment, wages by occupation, and largest changes in specific employment sectors. Farmworker and agricultural economic data includes the number of farms, farms acreage, and crop production (by acreage and commodity value) on either a county (when available) and regional level.

All migrant labor housing facilities and Rural Development 514 and 516 farmworker developments in the study areas were identified and evaluated. Attempts were made to survey each of these farmworker housing projects. Of those surveyed, information such as project type (i.e. apartments vs. dormitory worker housing), capacity, occupancy rates, amenities, lease terms, and rental rates were obtained for each property. Aggregate housing information is presented on a regional level. The location of farmworker facilities in relation to the agriculture employment centers is discussed.

A farmworker housing gap analysis is conducted for each region that compares the estimated number of low-income farmworkers (seasonal and migrant) with the farmworker housing capacity. The analysis is limited to farmworkers with annual incomes below $30,000, while the housing capacity is determined through published records and primary research conducted by Bowen National Research. The analysis concludes by providing estimates of the number of low-income farmworkers within a region that are not housed by any of the farmworker-specific housing projects within each region.

Barriers to the development of affordable housing for farmworkers in rural Texas are identified through a series of stakeholder interviews and developer surveys. These interviews and surveys are conducted for each region, as well as with those entities with statewide experience and knowledge. A summary of key findings and consensus opinions is provided and used as the basis for drawing conclusions as to the primary barriers to farmworker housing development.

Farmworker housing programs were evaluated for several key states that have a large agricultural presence and a large number of farmworkers. These states include California, Florida, Oregon, and Washington. Consideration was given to the existing farmworker housing stock and housing needs, migrant versus seasonal demands, and identification to barriers to the development of farmworker housing in rural Texas.

Based upon the research and findings contain in this report, we provide recommendations for government policies and procedures to mitigate or eliminate barriers to farmworker housing development and possible incentives to encourage development of housing to meet the housing needs of farmworkers.

C. LIMITATIONS

The intent of this report is to collect and analyze significant levels of employment, demographic and housing data for rural farmworker counties of Texas. Bowen National Research relied on a variety of data sources to generate this report (see Addendum A). These data sources are not always verifiable; however, Bowen National Research makes a concerted effort to assure accuracy. While this is not always possible, we believe that our efforts provide an acceptable standard margin of error. Bowen National Research is not responsible for errors or omissions in the data provided by other sources.

We have no present or prospective interest in any of the properties included in this report, and we have no personal interest or bias with respect to the parties involved. Our compensation is not contingent on an action or event resulting from the analyses, opinions, or use of this study. Any reproduction or duplication of this study without the expressed approval of the Texas Department of Housing and Community Affairs or Bowen National Research is strictly prohibited.

D. TERMS & DEFINITIONS

Various key terms associated with farm labor housing and workers, agriculture and other categories evaluated in this report are used throughout this document. The following provides a summary of the definitions for these key terms. It is important to note that the definitions cited below include the source of the definition, when applicable.

Accompanied Farmworker - A farmworker living with a spouse, children, or parents, or minor farmworkers living with a sibling. (Texas Migrant & Seasonal Farmworker Enumeration Profile – 2000)

Area Median Household Income (AMHI) - The median income for families in metropolitan and non-metropolitan areas, used to calculate income limits for eligibility in a variety of housing programs. HUD estimates the median family income for an area in the current year and adjusts that amount for different family sizes so that family incomes may be expressed as a percentage of the area median income. For example, a family's income may equal 80 percent of the area median income, a common maximum income level for participation in HUD programs. (Bowen National Research, Various Sources)

Facility - A structure, trailer, or vehicle, or two or more contiguous or grouped structures, trailers, or vehicles, together with the land appurtenant. (Texas Administrative Code, Title 10, Part 1, Chapter 90, Rule 90.1 *Definitions*)

Family - A group of people, whether legally related or not, that act as and hold themselves out to be a family; provided, however, that nothing herein shall be construed as creating or sanctioning any unlawful relationship or arrangement such as the custody of an unemancipated minor by a person other than their legal guardian. (Texas Administrative Code, Title 10, Part 1, Chapter 90, Rule 90.1 *Definitions*)

Farm Labor Camp - One or more tents, vehicles, buildings or structures, together with the tract of land appertaining thereto, used as living quarters by seasonal, temporary or migrant workers directly or indirectly in connection with any work or place where work is being performed, whether or not rent is paid or reserved in connection with the use or occupancy of such premises. (Bowen National Research)

Farmworker - Any person (and the family of such person) who received a substantial portion of his or her income from primary production of agricultural or aquacultural commodities or the handling of agricultural or aquacultural commodities in the unprocessed stage, or the processing of agricultural or aquacultural commodities, without respect to the source of employment. (U.S. Department of Agriculture)

HUD-code Manufactured Home (Chapter 1201 of the Texas Occupations Code):

(a) means a structure:

- (i) constructed on or after June 15, 1976, according to the rules of the United States Department of Housing and Urban Development;
- (ii) built on a permanent chassis;
- (iii) designed for use as a dwelling with or without a permanent foundation when the structure is connected to the required utilities;
- (iv) transportable in one or more sections; and
- (v) in the traveling mode, at least eight body feet in width or at least 40 body feet in length or, when erected on site, at least 320 square feet;

(b) includes the plumbing, heating, air conditioning, and electrical systems of the home; and

(c) does not include a recreational vehicle as defined by 24 C.F.R. Section 3282.8(g).

Manufactured Home (a.k.a. manufactured housing) - A HUD-code manufactured home or a mobile home. (Chapter 1201 of the Texas Occupations Code)

Migrant Agricultural Worker - An individual who (Texas Statutes - Section 2306.921):

(a) is working or available for work seasonally or temporarily in primarily an agricultural or agriculturally related industry; and

(b) moves one or more times from one place to another to perform seasonal or temporary employment or to be available for seasonal or temporary employment.

Migrant Labor Housing Facility- A facility that is established, operated, or used for more than three days as living quarters for two or more seasonal, temporary, or migrant families or three or more seasonal, temporary, or migrant workers, whether rent is paid or reserved in connection with the use of the facility. (Texas Administrative Code, Title 10, Part 1, Chapter 90, Rule 90.1 *Definitions* and Texas Statutes - Section 2306.921(3))

Mobile Home (Chapter 1201 of the Texas Occupations Code):

(a) means a structure:

(i) constructed before June 15, 1976;
(ii) built on a permanent chassis;
(iii) designed for use as a dwelling with or without a permanent foundation when the structure is connected to the required utilities;
(iv) transportable in one or more sections; and
(v) in the traveling mode, at least eight body feet in width or at least 40 body feet in length or, when erected on site, at least 320 square feet; and

(b) includes the plumbing, heating, air conditioning, and electrical systems of the home.

Operator - Any individual designated in an application for a license to operate a migrant labor housing facility or in signed correspondence from a licensee to the Department as having authority to act on behalf of the a licensee to administer day-to-day operation of that migrant labor housing facility and to respond to complaints, investigations, inspections, orders, and other matters as set forth in these rules. (Texas Administrative Code, Title 10, Part 1, Chapter 90, Rule 90.1 *Definitions*)

Reported Farmworkers – Farmworkers who are either U.S. Citizens or individuals who have legally authorized work permits through the H-2A Visa program. (USDA and Bowen National Research)

Residential Housing - A specific work or improvement undertaken primarily to provide dwelling accommodations, including the acquisition, construction, reconstruction, remodeling, improvement, or rehabilitation of land and buildings and improvements to the buildings for residential housing and other incidental or appurtenant nonhousing facilities. (Texas Statutes - Section 2306.004)

Rural Area - An area that is located (Texas Statutes-Section 2306.004):

(a) outside the boundaries of a primary metropolitan statistical area or a metropolitan statistical area;
(b) within the boundaries of a primary metropolitan statistical area or a metropolitan statistical area, if the statistical area has a population of 25,000 or less and does not share a boundary with an urban area; or
(c) in an area that is eligible for funding by the Texas Rural Development Office of the United States Department of Agriculture, other than an area that is located in a municipality with a population of more than 50,000.

Seasonal Farmworker means an individual whose principal employment (51% of time) is in agriculture on a seasonal basis, who has been so employed within the last twenty four months. (Migrant Health Program and Migrant & Seasonal Farmworker Enumeration Profiles Study – September 2000)

Standards Code - The Texas Manufactured Housing Standards Code. (Chapter 1201 of the Texas Occupations Code)

Unaccompanied Farmworker - A farmworker who does not live with immediate family. (Texas Migrant & Seasonal Farmworker Enumeration Profile – 2000)

Unreported Farmworker - Farmworkers who are not U.S. Citizens and lack legal authorization to work in the United States or are otherwise undocumented. (USDA and Bowen National Research)

II. EXECUTIVE SUMMARY

This report provides a migrant/seasonal farmworker housing needs assessment of the rural areas of Texas. The report concludes by providing a variety of recommendations that support the development required to best meet the affordable housing needs of farmworkers in rural Texas. *It is important to note that this study excludes counties that did not have a sufficient number of farmworkers or urban markets that did not meet the study's criteria, though urban markets have a significant number of farmworkers.*

A. SCOPE OF WORK

The scope of work included in this report included:

- A housing survey and/or inventory of 28 farmworker-designated housing projects with a combined 2,537 occupant capacity, 310 affordable rental housing properties (USDA, Tax Credit, Public Housing and HUD financed projects) with 3,170 units, for-sale housing data on 2,480 currently available units, and data on over 1,300 manufactured homes were analyzed.

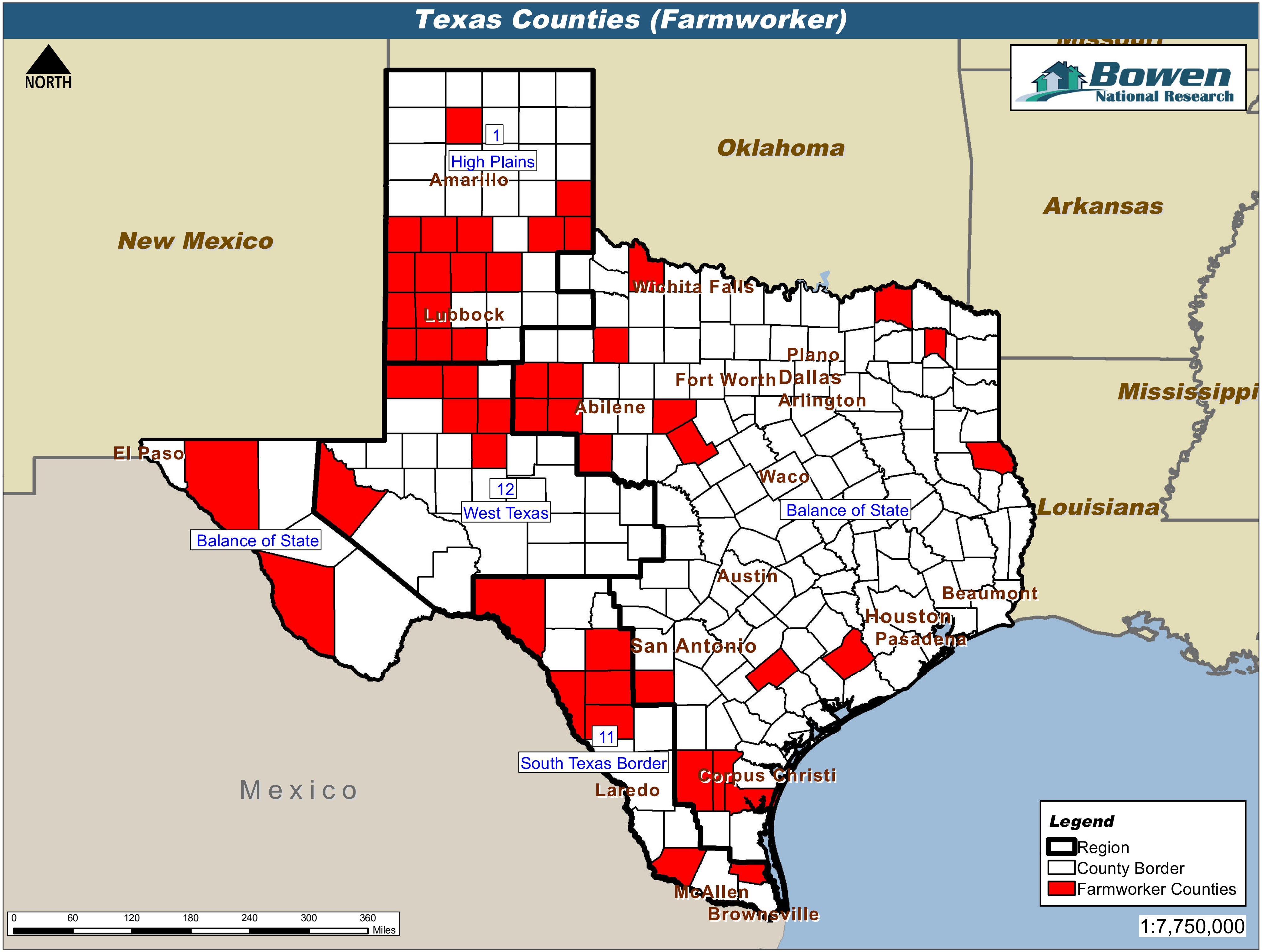
- An evaluation of nearly 30 different demographic and economic metrics related to the trends and characteristics of each region and corresponding rural counties was provided. Several of these metrics are specifically related to agricultural and farmworker data.

- Stakeholder interviews were conducted with over 50 representatives across all four rural regions in Texas as well as stakeholders who addressed housing issues at the state level. A summary of stakeholder perceptions and insights as to development experiences and barriers to developing farmworker housing in rural Texas is provided.

- A farmworker housing gap analysis was completed that took into account the estimated number of farmworkers in 2010 making less than $30,000 annually and the housing capacity of farmworker-designated housing in each region and county considered in this report.

- We provided recommendations for improving farmworker housing development opportunities in rural Texas, as they relate to programs, policies, and processes, and development of partnerships, as well education and outreach efforts.

This analysis was limited to rural counties that contain more than 1,000 "Migrant/Seasonal Farmworkers and Non-Farmworkers as determined from the September 2000 *Migrant and Seasonal Farmworker Enumeration Profile Study of Texas* (MSFW Enumeration Profile). Based on the MSFW Enumeration Profile, 49 counties meet this initial criteria. A map of TDHCA's 4 service regions and the corresponding counties (denoted by the red shading) that were included in this analysis are delineating in the map on the following page.


Texas Counties (Farmworker)
NORTH
Bowen National Research
Oklahoma
Arkansas
New Mexico
Mississippi
Louisiana
Mexico
1
High Plains
Amarillo
Lubbock
Wichita Falls
Plano
Fort Worth
Dallas
Arlington
Abilene
El Paso
Waco
12
West Texas
Balance of State
Balance of State
Austin
Beaumont
Houston
Pasadena
San Antonio
11
South Texas Border
Laredo
Corpus Christi
McAllen
Brownsville
Legend
Region
County Border
Farmworker Counties
0 60 120 180 240 300 360 Miles
1:7,750,000

B. SUMMARY OF KEY FINDINGS

The following is a summary of some of the key findings and conclusions from our overall report.

- Bowen National Research estimated that there were approximately 34,520 migrant or seasonal farmworkers within the 49 rural counties within the four study regions of Texas in 2010. While there is no historical farmworker data that incorporates the methodology (primarily uses the most current payroll data reported to the Department of Labor) used by Bowen National Research for estimating the number of farmworkers in Texas, the number of farmworkers within the study areas appears to be declining. This conclusion was corroborated through several stakeholder interviews and our economic data analysis that indicated a decline in agriculture-related jobs between 2000 and 2010. Reasons attributed to the decline in the number of farmworkers included advances in and implementation of farming mechanization and the expanding non-agricultural job market that provides farmworkers alternative job choices.

- The Balance of State Region, which includes 20 counties and is the largest geographic area of this study, has the largest number of estimated farmworkers in the study area at 13,744, or 39.8% of the total estimated farmworkers for the four study areas. Region 1 (High Plains Region), located in the far north central portion of the state, has the second largest estimated number of farmworkers, with 11,074. Regions 11 (South Texas Border Region) and 12 (West Texas Region) have a notably lower estimated number of farmworkers at 4,861 and 4,841, respectively. The number of farmworkers by study region is not surprising given that the Balance of the State Region has the largest number of farms at 18,256 and the most acres of farmland, at 13,388,804 acres. Region 1 also has a notable number of farms, with 8,867 farms and 8,4,24,801 acres of land, which contributes to this region's relatively high number of farmworkers. Regions 11 and 12 have significantly fewer farms and farmland, which corresponds to the lower number of farmworkers within these regions.

- The total employment base of the four rural study regions has remained relatively stable with some modest job growth since the start of 2008, when the impact of the national recession began for much of the country. The four study regions had a combined increase in jobs of 0.9% since the start of 2008. While the employment growth within the four rural study regions is slower than the overall Texas 3.5% increase in jobs since 2008, the four rural study regions still outperformed the national average employment base decline of 4.6%. The combined unemployment rate of the four regions is 9.1%, which has gone virtually unchanged for the past two years is below the national unemployment rate of 9.6%. It is typical for rural markets to not experience large fluctuations in their employment bases unless there is a large employer expanding or contracting in the area. As such, the economies of the four rural study regions are considered stable.

- Cotton farming activity (based on crops harvested by acres) is prevalent in each of the study regions. Cotton is the top harvested crop in Region 1 (High Plains Region) and Region 12 (West Texas Region), and the second largest harvested crop in Region 11 (South Texas Border) and Balance of State Region. Farming activity is also heavily influenced in each study region by the harvesting of Sorghum for Grain, Forage (Hay, Grass, etc.), Wheat, and Peanuts. Of the most common crops, Cotton is considered the most labor intensive, requiring a large base of farmworkers. While the overall number of farms has declined in the four rural study regions between 2002 and 2007 (the latest Census of Agriculture Data available), the acreage of farm land increased during this time by nearly 9.0%. More importantly, however, according to the U.S. Census and national demographic provider ESRI, the Agriculture, Forestry, Fishing and Hunting job sector (considered as a single job sector) experienced a decline in each of the four rural study regions between 2000 and 2010. The decline in agriculture-related jobs ranged from 1,204 job in Region 12 (West Texas Region) to 6,945 jobs in Region 1 (High Plains Region). While these job losses are not all among migrant and seasonal farmworkers, these declines further support our conclusion that the number of farmworkers in Texas has been declining over the past decade.

- Generally, farmworkers have relatively low incomes as evidenced by the fact that 90% of the farmworkers make less than $30,000 annually from farm work, with the largest share (47.0%) of farmworkers making between $10,000 and $19,999 annually. When comparing income levels for all households (regardless if farmworkers are within the households) in the entire study area, only 45.0% make less than $30,000. Compared with statewide numbers (also not exclusive to farmworkers), only 31.0% of households make less than $30,000. As such, farmworkers have a disproportionately high share of low-incomes, thereby limiting most farmworkers to affordable housing alternatives. While farmworkers may supplement their income with other non-farm work and/or have other family members contributing to the household income, national studies indicate that these other non-farm related incomes are minimal.

- Bowen National Research identified and surveyed a variety of affordable housing alternatives within the four rural study areas. Based on this research, it is evident that demand for affordable rental housing throughout the study areas is very high. USDA 514 and 516 farmworker housing and licensed migrant labor housing is historically 90% to 100% occupied (though it may decline during off season or following a drought/flood). According to our rental housing survey, affordable apartments (those financed through non-farmworker federal programs of USDA and TDHCA) are 97.6% occupied. Also based on our survey, manufactured home communities are 90.2%

occupied (which is considered high for such communities). As such, there is limited availability of affordable rental alternatives for farmworkers and their families. Adding to farmworkers' problem of securing affordable housing is the fact that because of the short-term occupancy needs of migrant farmworkers (often staying in a particular area or community for just a few weeks), many of the conventional or traditional multifamily projects offered in most markets are not conducive to migrant farmworkers' needs. For example, many property owners of multifamily projects will not rent to anyone for just a few weeks, thereby further limiting the housing options available to farmworkers. As such, many markets are in need of housing to meet the specific needs of migrant farmworkers.

- Besides rental housing, for-sale housing represents a potential housing alternative that is available to farmworkers. Based on our for-sale housing analysis that included an inventory of available for-sale housing alternatives within the entire study area, 1,164 housing units were identified that were priced below $100,000. These homes represent nearly half (46.9%) of the for-sale housing stock that is available to low-income households including farmworkers. Based on the estimated farmworker incomes for the four study regions, with approximately 90% of farmworkers making less than $30,000 a year, most farmworkers likely can only afford a for-sale housing product under $90,000, which yields a monthly mortgage payment close to $600 per month (depending upon financing terms and down payment). As such, it appears that there is a fair base of lower priced for-sale housing alternatives within the four study regions that are viable choices for low-income farmworkers, assuming they have access to the credit and other resources required to purchase a home. It will be important that for-sale housing programs and efforts be supported to enable farmworkers access to this housing alternative.

- As detailed in our farmworker housing gap analysis (See *Section VII: Housing Demand Analysis*), there is an overall rental housing gap of 28,531 between the existing rental housing stock specifically designed and reserved for farmworkers and the estimated number of farmworkers within the four rural study regions. While farmworkers have other non-farmworker designated housing from which to choose, as shown in our survey of area rental housing alternatives, there is a limited number of vacancies among the affordable housing alternatives within each of the four study regions. As such, there are limited housing options available to low-income farmworkers. Further, many of these farmworkers are likely paying a higher share of their income towards rents than those living in USDA farmworker housing, which requires residents to only pay 30% of their income towards rent, or at licensed migrant labor housing facilities, where tenants often pay nothing towards rent. While each of the four study regions have relatively large housing gaps, it is of note that the Balance of State Region, which generally includes 20 scattered rural counties, has the largest number (12,369) of low-income farmworkers, yet has no farmworker designated housing. A likely contributor to this lack of farmworker-designated housing is the fact that the counties with the highest concentrations of farmworkers in the Balance of State Region are spread out and are often not adjacent to or near other counties with a notable number of farmworkers. The remaining three regions have farmworker housing gaps of 8,611 in Region 1 (High Plains Region), 3,390 in Region 11 (South Texas Border Region) and 4,161 in Region 12 (West Texas Region) and could likely support additional farmworker housing.

- Bowen National Research conducted stakeholder interviews with over 50 local, county and regional representatives across the four rural farmworker regions, as well as stakeholders who address farmworker housing issues on a statewide basis. The primary purpose of these interviews was to identify barriers to development, whether perceived or real, that discourages or prevents the development of farmworker housing in rural Texas. While the responses we received varied greatly, there were several common themes that constituted barriers to farmworker housing development. The most commonly cited barriers include:

    - Lack of funding sources specifically designated for farmworker housing
    - Lack of local government or community support
    - Timing of various Federal and state housing finance programs do not coincide with leveraging the funds necessary to build affordable housing
    - Difficulties with maintaining migrant housing facilities in compliance with inspection regulations as they sit vacant for much of the year
    - Confusion over building and maintenance regulations of licensed migrant farm labor housing
    - Lack of available farmworker data that identifies the number of farmworkers in a given area and identifying the quantity of additional farmworker housing units needed

- Recommendations that address some of the cited barriers to development are included at the end of this Executive Summary.

- While the number of farmworkers appears to be declining, there remains a large base of farmworkers who are not housed in farmworker-designated housing and who have limited available affordable housing options (based on our survey of housing) from which to choose. Given the unique employment situation (short-term, transient, etc) often associated with farm work, many farmworkers are having difficulty securing affordable housing. As such, the affordable housing industry should continue to explore means to provide housing to meet the specific needs of farmworkers.

- It is important to consider that unknown variables that can impact the agricultural/farming market and the number of farmworkers within Texas include natural disasters such as floods and droughts, wildfires, changes in agriculture commodities pricing, and legislation affecting immigration processes and requirements. Therefore, the future housing needs of farmworkers may vary periodically and should be monitored on a regular basis.

C. DEMOGRAPHIC OVERVIEW

Overall Demographic Trends (Not Exclusive to Farmworkers)

Total Population - Region 11 has experienced positive population growth of 9.7% between 2000 and 2010 and is projected to increase by 2.9% over the next five years. Region 1 has experienced and is projected to experience a population decline. Region 12 and the Balance of State Region are projected to generally have stable populations between 2010 and 2015. Combined, the four study regions are projected to experience a minimal population increase of 0.2% between 2010 and 2015, while the state of Texas is projected to experience an 8.5% increase during this same time. It is not unusual to experience minimal changes in population.

Total Households - Over the past decade, all regions but Region 1 have had positive household growth trends. Region 11 experienced the greatest household growth between 2000 and 2010, increasing by 7,473 households, an increase of 12.0%. While Region 1 is projected to experience a household decline (2.0%) and Region 11 is projected to experience a household increase (3.1%), the remaining regions are projected to experience stagnant household bases through 2015. Overall, the four study regions are projected to experience an increase of 0.2% between 2010 and 2015. This is not unusual for rural areas, but is much slower than the overall projected household growth rate of 8.4% for the state of Texas.

Total Households by Age - All four study regions are projected to experience notable increases among older adult (age 55+) households, while most regions will experience growth among those between the ages of 25 to 34. These household growth trends by age are similar to state trends and indicate a likely growing need for housing for young families and seniors.

Hispanic Population - An evaluation of the Hispanic and non-Hispanic population within the four study regions indicate that over one-third (37.6%) of the population is considered Hispanic. Region 11 (South Texas Border Region) has a significantly higher share (88.2%) of its population considered Hispanic, which is not surprising given its proximity to the U.S.-Mexican border.

Farmworker Population and Household Trends

Due to the unique nature of the farmworker industry, with varying seasonal employment changes and a very mobile migrant workforce, for example, it is difficult to accurately quantify various demographic data points for farmworkers. Further, while there are a variety of published data sources pertaining to farmworkers, due to the various points in time the data was collected, the scope of the data collection process, the definitions and parameters used by the data providers, there are varying estimates regarding farmworkers. For the purposes of presenting demographic estimates for the farmworker industry, we have used data from three nationally recognized data sources that tabulated various demographic characteristics of the farm labor industry.

Because the three primary farmworker data sources cited in this report vary in time (2000, 2001 – 2002, and 2007) and differ in methodologies and definitions, we have provided more current farmworker data estimates using an approach that was developed by the Shimberg Center for Housing Studies at the University of Florida for a report entitled *The Need for Farmworker Housing in Florida*, dated July 16, 2010.

Incorporating the Shimberg Center for Housing Study's methodology, we have estimated the total number of farmworkers in each county and region studied in Texas by using two primary data sources: The Bureau of Labor Statistics' Quarterly Census of Employment and Wages (QCEW) and the Department of Labor's National Agricultural Workers Survey (NAWS). The specific steps and methodology used in our demographic estimates of Texas farmworkers is outlined beginning on page III-9 of this report.

Based on the methodology outlined in Section III, Bowen National Research was able to project various farmworker demographic characteristics for each study region, as well as for each selected rural county in the corresponding regions. These estimates are limited to 2010 and include the distribution of farmworker incomes, reported and unreported farmworkers, seasonal and migrant farmworkers, and accompanied and unaccompanied farmworkers.

The following table summarizes Bowen National Research's estimates for the four regions included in our analysis (Note: Some totals may slightly differ from within and between tables in this report due to rounding):

	2010 Estimated Farmworkers	
	Number	Percent
Region 1 (High Plains)	11,074	32.1%
Region 11 (South Texas Border)	4,861	14.1%
Region 12 (West Texas)	4,841	14.0%
Balance of State Region	13,744	39.8%
Total	34,520	100.0%

Source: Bowen National Research
Note: Data is limited to only the counties that met the farmworker county designation

Bowen National Research estimates that there were 34,520 farmworkers within the 49 counties within the four study regions. Bowen National Research estimates of farmworkers within the study areas are very comparable to the Census of Agriculture, and take into account the most current payroll data reported to the Department of Labor. This total includes estimates of both reported and unreported farmworkers, which are discussed in greater detail later in this section. The Balance of State Region, which includes 20 counties, has the largest number of estimated farmworkers in the study area at 13,744, or 39.8% of the total estimated farmworkers for the four study areas. Region 1 has the second largest estimated number of farmworkers, with 11,074. Regions 11 and 12 have a notably lower estimated number of farmworkers at 4,861 and 4,841, respectively.

Due to the nature of the agriculture job sector and the labor needs for the industry, as well as Texas' proximity to Mexico, there are a notable number of unreported (and possibly illegal immigrant) farmworkers in Texas. As a result, Bowen National Research used data from a variety of agriculture and farmworker studies to estimate the number of reported and unreported farmworkers within each study area.

The following summarizes Bowen National Research's estimated number of reported and unreported farmworkers for each study region for 2010.

	Estimated Reported & Unreported Farmworkers (2010)					
	Reported		Unreported		Total	
	Number	Percent	Number	Percent	Number	Percent
Region 1 (High Plains)	7,054	38.5%	4,020	24.8%	11,074	32.1%
Region 11 (South Texas Border)	2,445	13.4%	2,416	14.9%	4,860	14.1%
Region 12 (West Texas)	3,316	18.1%	1,525	9.4%	4,842	14.0%
Region Balance	5,484	30.0%	8,260	50.9%	13,744	39.8%
Total	18,299	100.0%	16,221	100.0%	34,520	100.0%

Source: Bowen National Research; National Agricultural Worker Survey
Note: Data is limited to only the counties that met the farmworker county designation

Slightly more than one-half (53.0%) of all estimated farmworkers in the study areas are reported farmworkers, while the balance of farmworkers are considered unreported workers. It is of significance that Regions 1 and 12 have much larger shares of reported workers, 63.7% and 68.5% respectively, than Region 11, which has one-half of the estimated farmworkers as reported. The fact that Region 11 has half of the farmworkers as unreported is not surprising given this region, also known as (South Texas Border) service region, is located along the Texas-Mexico border and likely has more illegal immigrants than most other regions, which would lead to more unreported workers.

Using information from the National Agricultural Workers Survey (2005 to 2009), Bowen National Research's 2010 estimated for the number of migrant (as defined by Texas Statutes - Section 2306.921) and seasonal farmworkers by study region. These estimates are included in the following table.

	Estimated Migrant & Seasonal Farmworkers (2010)					
	Migrant		Seasonal		Total	
	Number	Percent	Number	Percent	Number	Percent
Region 1 (High Plains)	5,951 (53.7%)	29.8%	5,123 (46.3%)	35.3%	11,074	32.1%
Region 11 (South Texas Border)	3,577 (73.6%)	17.9%	1,283 (26.4%)	8.8%	4,860	14.1%
Region 12 (West Texas)	2,242 (46.3%)	11.2%	2,600 (53.7%)	17.9%	4,842	14.0%
Balance of State Regions	8,221 (59.8%)	41.1%	5,521 (40.2%)	38.0%	13,742	39.8%
Total	19,991	100.0%	14,527	100.0%	34,520	100.0%

Source: Bowen National Research; NAWS (2005 to 2009)
Note: Data is limited to only the counties that met the farmworker county designation

The share of migrant farmworkers is highest in Region 11, representing nearly three-fourths (73.6%) of all farmworkers in this region. This correlates to the fact that this region also has a greater share of unreported workers than most regions. Only Region 12 has a higher share (53.7%) of Seasonal Farmworkers than Migrant Farmworkers (46.3%). Among the four regions, the Balance of State Region has the largest number of Migrant Farmworkers, with over 8,221 such workers.

Bowen National Research estimated the distribution of farmworkers by income for each of the study regions for 2010. It is important to note that the data is provided on the individual farmworker level and does not take into consideration any additional income from non-farm work or government assistance that farmworkers may receive or other income from non-farmworkers living with farmworkers who may be contributing to the family household income. As such, these income estimates should be considered conservative.

	Farmworkers by Annual Income (2010)				
	Less than $10,000	$10,000 - $19,999	$20,000 - $29,999	$30,000 & Higher	Total
Region 1 (High Plains)	2,436	5,205	2,326	1,107	11,074
Region 11 (South Texas Border)	1,069	2,284	1,021	486	4,860
Region 12 (West Texas)	1,065	2,276	1,017	484	4,842
Region Balance	3,024	6,459	2,886	1,375	13,744
Total	7,594 (22.0%)	16,224 (47.0%)	7,250 (21.0%)	3,452 (10.0%)	34,520

Source: Bowen National Research; NAWS (2005 to 2009)
Note: Data is limited to only the counties that met the farmworker county designation

While it is possible that low-income households, depending upon household size, with incomes above $30,000 could qualify for government-subsidized housing, for the purposes of this analysis we have assumed that any farmworker with an annual income of $30,000 or higher would likely reside in Tax Credit or other non-subsidized housing in their area. Conversely, we assume farmworkers with annual incomes below $30,000 would reside in government-subsidized housing designated specifically for farmworkers, such as Rural Development 514 and 516 and migrant labor housing facilities projects, or in other affordable housing alternatives.

The Migrant and Seasonal Farmworker Enumeration Profile of Texas (2000) provided the estimated shares of accompanied and unaccompanied farmworkers, both migrant and seasonal. Accompanied farmworkers are generally considered those who live with a relative. These shares were used to estimate the number of accompanied and unaccompanied migrant and seasonal farmworkers for 2010. The following table summarizes the distribution of migrant and seasonal farmworkers by whether or not they are accompanied or unaccompanied for each of the four study regions.

	Accompanied & Unaccompanied Farmworkers (2010)				
	Migrant Farmworker s		Seasonal Farmworkers		
	Accompanied	Unaccompanied	Accompanied	Unaccompanied	Total
Region 1 (High Plains)	3,204	3,266	1,469	3,136	11,074
Region 11 (South Texas Border)	1,406	1,433	645	1,376	4,860
Region 12 (West Texas)	1,401	1,428	642	1,371	4,842
Region Balance	3,976	4,053	1,823	3,891	13,744
Total	9,987 (28.9%)	10,180 (29.5%)	4,579 (13.3%)	9,774 (28.3%)	34,520

Source: 2000 MSFW Enumeration Profiles
Note: Data is limited to only the counties that met the farmworker county designation

The share of accompanied and unaccompanied migrant farmworkers is split relatively even. Meanwhile, unaccompanied seasonal farmworkers are more than double the number of accompanied seasonal farmworkers. Accompanied farmworkers are in greater need of housing that can accommodate families, such as apartments, manufactured homes, mobile homes and houses. Unaccompanied farmworkers are more likely to be open to housing alternatives such as dormitory housing or shared housing arrangements.

D. ECONOMIC OVERVIEW

Overall Economic Trends

- Since 2006, Region 11 (South Texas Border Region) has experienced the greatest job growth, adding 6,830 jobs, or an increase of 8.7% over the past five years. This region has also experienced positive job growth over the past two years, while the other regions' job bases have remained relatively stagnant. All four regions, however, have experienced positive growth between 2006 and 2011, despite the national recession which had an adverse impact on job growth in many regions of the nation. Compared with the state of Texas overall job growth rate of 3.5% since 2008, the four study regions have a combined job growth rate of 0.9%. While slower than the state average, this growth rate is not unusual for rural markets.

- The unemployment rate is highest in Region 11, at 13.8%, and lowest at 6.7% in Region 1. Overall, unemployment rates have risen in each region since 2006. While the unemployment rates within the four study regions are generally higher than the overall state average (7.9% - September 2011), they appear to have stabilized over the past two years, as the national economy has stabilized.

- Primary farming activity within the four study regions, based on crops harvested by acres, is concentrated among the Cotton, Sorghum for Grain, Forage (Hay, Grass, etc.), Wheat, and Peanuts. Cotton harvesting is the largest of the crops harvested and is generally considered a labor-intensive crops, requiring a large base of farmworkers. Many of the other top harvested crops more heavily involve mechanization, reducing the need for farmworkers. However, given the dominance of Cotton harvesting (it is the largest or second largest harvested crop in each of the four study regions), the need for farmworkers within each region exists.

- According to the U.S. Census and national demographic provider ESRI, the Agriculture-related jobs experienced an overall decline of 18,656 jobs within the four combined rural study regions between 2000 and 2010. This represented the largest decrease within any industry within the rural study regions, with Manufacturing being the second largest decline at 6,306. Within the individual study regions, Agriculture-related jobs declined during this time period as follows: Region 1 (High Plains Region) 6,945 jobs lost, Region 11 (South Texas Border Region) 2,774 jobs lost), Region 12 (West Texas Region) 1,204 jobs lost and Balance of State Region 7,732 jobs lost. While these job losses are not all among migrant and seasonal farmworkers, the Agriculture-related job losses likely correlate to migrant and seasonal farmworker job losses.

The following tables summarize the total employment base and unemployment rates for each of the study regions between 2006 and 2011. These numbers are compared with the overall state of Texas numbers, as well.

		Total Employment					
		2006	2007	2008	2009	2010	2011*
Region 1 (High Plains)	Number	78,193	79,119	81,711	82,099	81,301	80,712
	Change	-	1.2%	3.3%	0.5%	-1.0%	-0.7%
Region 11 (South Texas Border)	Number	79,325	79,959	81,853	84,120	85,838	86,155
	Change	-	0.8%	2.4%	2.8%	2.0%	0.4%
Region 12 (West Texas)	Number	29,929	30,762	31,332	31,714	31,707	31,662
	Change	-	2.8%	1.9%	1.2%	0.0%	-0.1%
Balance of State Region	Number	173,560	175,423	176,740	175,630	176,629	176,261
	Change	-	1.1%	0.8%	-0.6%	0.6%	-0.2%
Sum of Regions	Number	361,007	365,263	371,636	373,563	375,475	374,790
	Change		1.2%	1.7%	0.5%	0.5%	-0.2%
State of Texas	Number	10,757,510	10,914,098	11,079,931	11,071,106	11,264,748	11,464,525
	Change	-	1.5%	1.5%	-0.1%	1.7%	1.8%

Source: U.S. Department of Labor, Bureau of Labor Statistics
Note: Data is limited to only the counties that met the farmworker county designation
*Through September

		Unemployment Rate					
		2006	2007	2008	2009	2010	2011*
Region 1 (High Plains)	Number	4.7%	4.1%	4.1%	6.0%	6.5%	6.7%
	Change	-	-0.6	0.0	1.9	0.5	0.2
Region 11 (South Texas Border)	Number	9.5%	8.6%	9.0%	12.6%	13.4%	13.8%
	Change	-	-0.9	0.3	3.6	0.8	0.4
Region 12 (West Texas)	Number	5.2%	4.3%	4.7%	7.5%	7.5%	7.4%
	Change	-	-0.9	0.4	2.8	0.0	-0.1
Balance of State Region	Number	4.9%	4.3%	4.7%	7.5%	8.1%	8.1%
	Change	-	-0.6	0.4	2.8	0.6	0.0
Sum of Regions	Number	5.9%	5.2%	5.5%	8.4%	9.0%	9.1%
	Change	-	-0.7	0.3	2.9	0.6	0.2
State of Texas	Number	4.9%	4.4%	4.9%	7.5%	8.2%	7.9%
	Change	-	-0.5	0.5	2.6	0.7	-0.3

Source: U.S. Department of Labor, Bureau of Labor Statistics
Note: Data is limited to only the counties that met the farmworker county designation
*Through September

Generally, job growth within the four rural study regions has been positive and while unemployment rates within the individual study regions are higher than the state average (7.9%), they have remained stable over the past two years.

Agricultural and Farmworker Economics

Within the 49 study counties that fall within the four study regions, there are 33,451 farms, according to the 2007 Census of Agriculture. The Balance of the State Region, which contains 20 counties, has the largest number of farms at 18,256. This region also has the most acres of farmland, at 13,388,804 acres. Region 1 also has a notable number of farms, with 8,867 farms and 8,4,24,801 acres of land. The following table illustrates the distribution of farms and farmland acreage by region.

	Farms and Farmland Sizes by Region		
	Number of Farms	Land in Farms (Acres)	Average Size (Acres)
Region 1 (High Plains)	8,867	8,424,801	950.1
Region 11 (South Texas Border)	3,559	5,408,131	1,519.6
Region 12 (West Texas)	2,769	4,016,674	1,450.6
Balance of State Region	18,256	13,539,198	741.6
Total	**33,451**	**31,388,804**	**938.3**

Source: 2007 Census of Agriculture
Note: Data is limited to only the counties that met the farmworker county designation

While Regions 11 and 12 have the fewest number of farms and the lowest amount of farmland acreage, the regions contain the largest average sized farms. Region 11 farms are an average of 1,519.6 acres per farm, while Region 12 is comparable, with 1,450.6 acres per farm.

The number of farms and harvested farmland acreage in 2002 and 2007, as well as the change that has occurred during this five year span, for each of the four regions is summarized in the following table (Note: The table below shows *harvested* farmland acreage, while the table above is total acreage, regardless if it is harvested for crops or not).

	Change in Farms and Farmland Acreage (2002 to 2007) Of Harvested Cropland					
	2002		2007		Change	
	Farms	Acres	Farms	Acres	Farms	Acres
Region 1 High Plains	4,435	3,110,199	4,089	3,494,398	-346	384,199
Region 11 South Texas Border	910	272,696	933	335,378	23	62,682
Region 12 West Texas	1,282	883,244	1,271	1,092,588	-11	209,344
Balance of State Region	8,086	1,909,351	8,211	1,795,818	125	-113,533
Total	**14,713**	**6,175,490**	**14,504**	**6,718,182**	**-209**	**542,692**

Source: 2007 Census of Agriculture
Note: data is limited to only the counties that met the farmworker county designation

The total number of farms in Region 1 decreased significantly, losing 346 farms (7.8%) between 2002 and 2007, yet the region expanded its harvested farm acreage by 384,199, or 12.4%. Conversely, the Balance of the State Region added 125 farms, yet lost 113,533 (6.0%) acres during this same time. Overall, the study regions combined lost 209 farms but added over a half million acres of farmland.

The top three crops by acreage within each of the four study regions are summarized on the following table:

	Primary Crops by Acres by Region								
	Top Crop Type			Second Crop Type			Third Crop Type		
	Crop	Farms	Acres	Crop	Farms	Acres	Crop	Farms	Acres
Region 1 High Plain	Cotton	2,445	1,674,110	Wheat	1,771	717,471	Sorghum for Grain	1,344	425,876
Region 11 (South Texas Border)	Sorghum for Grain	232	151,661	Cotton	104	56,067	Forage (Hay Grass, Etc)	578	45,295
Region 12 (West Texas)	Cotton	1,013	880,248	Peanuts	224	62,887	Wheat	183	58,996
Balance of State Region	Forage (Hay, Grass, Etc)	6,665	484,098	Cotton	807	454,048	Wheat	916	376,199

Source: 2007 Census of Agriculture
Note: Data is limited to only the counties that met the farmworker county designation

Cotton is the primary harvested crop by acreage in Regions 1 and 12. Sorghum for Grain is the primary crop in Region 11 and Forage (hay, grass, etc.) is the primary crop in the Balance of State Region. All of these rural study regions are impacted by Cotton harvesting, which is labor intensive requiring a large number of farmworkers.

E. HOUSING SUPPLY

Farmworker housing in Texas is available in a variety of types, structures, locations and quality. Some housing is on-farm, provided by the grower/employer, while a variety of off-farm housing alternatives are offered in most markets. The most common housing alternatives available to farmworkers includes migrant labor housing facilities, USDA-financed housing specifically designated for farmworkers, conventional/affordable apartments, manufactured homes, single-family homes and a variety of non-conventional housing options such as hotels, RV's/campers, and, in some cases, tents.

Because of the temporary and seasonal nature of agricultural work, as well as the notable share of non-U.S. resident agriculture workers that migrate to and within the United States, the types of housing required to meet the needs of the farmworkers varies in location, duration, structure type, and specific accommodations. This has, naturally, resulted in a diverse housing stock designed to meet the broad needs of the farmworkers. This analysis evaluates the most common housing alternatives used by farmworkers in Texas.

A general description of the housing types considered in this analysis follows. For additional details, please see *Section V: Housing Supply Analysis.*

<u>Licensed migrant labor housing</u>

Any housing property that houses migrant farm workers is required to be licensed as migrant labor housing by the Texas Department of Housing and Community Affairs (TDHCA). These projects include apartments, dormitory and barracks style housing structures. As of August 2011, TDHCA had identified 31 licensed migrant labor housing facilities within Texas. A total of 19 migrant labor housing facilities are within the areas we studied in this analysis. Though some migrant labor housing units are within Federally-financed properties (see: USDA/Rural Development Sections 514 & 516 Housing below), most housing is privately financed.

USDA/Rural Development Sections 514 & 516 Housing

Rural Housing Services administers the Farm Labor Housing and Grant program under Sections 514 and 516 of the Housing Act of 1949. This program provides direct loans and grants annually for the development, purchase, improvement, and repair housing for laborers employed on farms or associated with the handling or processing of off-farm industries. This can be for housing for migrant and non-migrant farmworkers. Based on information provided by USDA, there are nine Rural Development 514 & 516 financed projects containing 384 units in the 4 regions included in this analysis.

Non-Farmworker-Specific Affordable Apartments

According to information from the National Center for Farmworker Health, Incorporated (NCFH) approximately 50% of farmworkers live in housing that they rent from someone other than their employer. While affordable apartments developed under the Rural Development 515 and Low-Income Housing Tax Credit (LIHTC) programs are not built specifically for farmworkers, farmworkers are not prohibited from occupying units developed under these affordable housing programs. Based on inventories maintained by USDA and TDHCA, there are 310 affordable rental housing projects within the counties studied within the four regions.

Manufactured Homes

Manufactured homes, for the purposes of this analysis, consist of homes that meet the definition of a HUD Code manufactured home or a mobile home. This housing alternative may range from a single, isolated unit to units located within manufactured home communities. While there are no state or federal programs that fund the development of manufactured housing or manufactured home communities, many of the manufactured homes are low-cost and provide an affordable housing alternative to farmworkers. According to American Community Survey, it is determined that there are approximately 31,743 manufactured/mobile home units within the study areas. Of these, 23,789 were owner-occupied and 7,954 were renter-occupied. Bowen National Research conducted a survey of manufactured home communities within each region to determine occupancy rates, rents/fees, and project features.

For-Sale Housing (Primary Single-Family Homes)

Single-family homes are located in each study area and range in a wide variety of product designs, ages and quality. Based on Census data, most single-family homes are owner-occupied. Bowen National Research conducted research to identify the available single-family rental alternatives offered in the study areas. A total of 2,480 housing units were identified as being for-sale within the study areas.

Non-Conventional Rentals and Living Arrangements

Non-conventional rentals are in a variety of forms, and can include units over storefronts, RVs/campers, hotels/motels, and in some cases, tents, garages, sheds or other temporary shelter. Because such housing varies greatly and is not subject to federal or state regulations, data for such housing is not readily available or consistent. While small motels are rented on a weekly basis during the migratory farmworker season, we were unable to obtain specific rental information from these small properties due to the sensitivity of the migrant farmworker situation and possible presence of illegal immigrants. As a result, it is difficult to draw specific conclusions as to occupancy rates, rent levels and features. As such, Bowen National Research did not survey or evaluate such housing for this study.

Unlicensed Farmworker Housing

TDHCA is responsible for the licensing of migrant farmworker housing facilities and makes attempts to identify such housing. In instances where such housing is identified, TDHCA would contact the property owner to begin the licensing process. Currently, TDHCA has no record of unlicensed farmworker housing. During our research, Bowen National Research made inquiries with developers, housing authorities, planners and other stakeholders throughout the study regions as to whether or not they were aware of any possible unlicensed farmworker facilities within the studies. Based on these interviews, there were no known or disclosed unlicensed facilities.

Farmworker-designated Rental Housing

The chart below reflects the number of projects, units and capacity of TDHCA licensed migrant labor housing and USDA/Rural Development 514 & 516 housing. Note that the estimated capacity for the USDA/RD 514 & 516 projects was calculated using two people per bedroom. Also note that if a project is licensed as TDHCA migrant housing and also operates under the USDA/Rural Development program, these units and projects have only been included as USDA/RD 514 & 516 housing inventory count below (there are only three of these projects with 103 units and a capacity for 386 people, all of which are located in Region 1).

	Rural Texas Farmworker-Designated Rental Housing Inventory 2011								
	Migrant Labor Housing Facilities			USDA/RD 514 & 516 Farmworker Housing			Total Farmworker Housing		
Region	**Projects**	**Units**	**Capacity**	**Projects**	**Units**	**Capacity***	**Projects**	**Units**	**Capacity**
Region 1 High Plains	12	122	542	5	207	814	**17**	**329**	**1,356**
Region 11 South Texas Border	0	0	0	4	177	984	**4**	**177**	**984**
Region 12 West Texas	7	46	197	0	0	0	**7**	**46**	**197**
Balance of State Region	0	0	0	0	0	0	**0**	**0**	**0**
Total	19	168	739	9	384	1,798	**28**	**552**	**2,537**

*Based on two-persons per bedroom

Note: Data is limited to only the counties that met the farmworker county designation

The 28 farmworker-designated projects identified in the study areas have a combined 552 units with an estimated housing capacity for 2,537 people. Region 1, located in the far northern portion of the state, has the largest number of farmworker housing projects at 17 and the largest estimated capacity of 1,356 persons (more than one-half of the capacity in the study areas). Region 11 has a notable capacity for 984 persons, or 38.8% of the capacity of all regions combined. It is significant to note that the Region 12 has a capacity to house only 197 persons and The Balance of State Region does not have any farmworker housing within the rural farmworker counties within the region. Demand for farmworker-designated housing is strong, as evidenced by the high occupancy levels of these projects, which historically range between 90% and 100%. It is critical to note that the combined 75.5% occupancy rate of these projects from our late summer/early fall 2011 survey was caused by the drought and wildfires that impacted several agricultural areas of the state and *temporarily* lowered occupancies.

Non-Farmworker Affordable Rental Housing

While affordable apartments developed under the USDA/Rural Development 515 and Low-Income Housing Tax Credit (LIHTC) programs are not built specifically for farmworkers, farmworkers are not prohibited from occupying units developed under these affordable housing programs. Based on inventories kept by USDA and TDHCA, there are 310 affordable rental housing projects within the four study regions. Between July and October of 2011, Bowen National Research was able to survey 290 of these projects. While many apartment managers and leasing agents would not disclose or did not know the specific number of farmworkers that reside at their properties, based on our surveys, it is evident that some farmworkers choose to inhabit affordable housing units developed under the RD 515 and LIHTC programs, as well as other affordable housing programs. Of the 11,948 combined units at these 290 affordable housing projects, 11,751 are occupied, yielding an overall 97.3% occupancy rate.

Projects identified, inventoried and surveyed operate under a number of affordable housing programs including the Low-Income Housing Tax Credit (LIHTC), HUD Sections 8, 202, and 236, Public Housing, and USDA/Rural Development 515 programs. A variety of data points were collected and tabulated for each project surveyed, including unit mixes, rental rates, vacancies, wait lists, amenities, units sizes (square footage), utility responsibilities, year built and specific program requirements (i.e. resident income limitations).

The table below summarizes the inventory of all government-financed affordable rental housing options by program type that were identified within the four study regions. When units operate under multiple programs, we have allocated the units within the program that generally serves the lowest income housing segment. For example, units of a mixed Tax Credit and HUD financed project were grouped within the HUD category. This inventory of housing does not include Housing Choice Vouchers.

Region	Non-Farmworker-Designated Affordable Rental Housing Inventory 2011											
	Surveyed Units				Not Surveyed Units				Total Units			
	TAX	HUD	PH	USDA	TAX	HUD	PH	USDA	TAX	HUD	PH	USDA
Region 1 High Plains	214	383	510	648	0	0	0	0	214	383	510	648
Region 11 South Texas Border	633	425	1,053	686	0	0	391	0	633	425	1,444	686
Region 12 West Texas	183	363	338	130	0	0	0	32	183	363	338	162
Balance of State Region	1,029	1,251	2,539	1,637	245	204	403	37	1,274	1,455	2,938	1,674
Total	2,059	2,422	4,440	3,101	245	204	794	69	2,304	2,626	5,230	3,170

Tax – Tax Credit (both 9% and 4%)
HUD – Department of Housing and Urban Development (HUD Section 8, 202, 236 and 811 Programs)
PH – Public Housing
USDA – United States Department of Agriculture (RD 514, 515, and 516)
Note: Data is limited to only the counties that met the farmworker county designation; Unit counts do not include Housing Choice Vouchers, but do include project based subsidized units.

As the preceding table illustrates, the Balance of the State region contains the largest number of affordable housing units, with a total of 7,341 units. These units represent 55.1% of all affordable housing units identified. Region 12 has the least number of farmworker housing units. Based on this inventory, most of the units in rural Texas operate and were funded under the Public Housing program.

The following summarizes the overall occupancy rates of the affordable projects surveyed.

Region	Occupancy Rate
Region 1 High Plains	97.6%
Region 11 South Texas Border	98.4%
Region 12 West Texas	98.1%
Balance of State Region	98.8%

Source: Bowen National Research
Note: Data is limited to only the counties that met the farmworker county designation

Demand for affordable housing is extremely high in each study region, with no region having less than 97.6% of its supply occupied. As such, there is limited available affordable housing product from which low income households, including farmworkers, can choose.

Based on data reported by the American Community Survey (2005-2009), there are approximately 31,743 manufactured housing units within the 49 study counties. Of these units, 7,954 (25.0%) were renter-occupied and 23,789 (75.0%) were owner-occupied.

The following is a distribution of manufactured homes by study region:

Region	Manufactured Home Units by Type					
	Renter-Occupied		Owner-Occupied		Total Occupied	
	Number	Percent	Number	Percent	Number	Percent
Region 1 High Plains	1,691	31.2%	3,731	68.8%	5,422	100.0%
Region 11 South Texas Border	1,838	24.8%	5,570	75.2%	7,409	100.0%
Region 12 West Texas	803	29.0%	1,969	71.0%	2,772	100.0%
Balance of State Region	3,622	22.4%	12,519	77.6%	16,141	100.0%

Source: Bowen National Research
Note: Data is limited to only the counties that met the farmworker county designation

The largest number of renter-occupied manufactured homes is 3,622, in the Balance of State Region. Region 1 has the highest share of manufactured homes, at 31.2%.

Bowen National Research conducted a telephone survey of manufactured home communities that contained capacity for 1,350 homes. The following is a distribution of home lots and current occupancy/usage rates.

Region	Manufactured Home Communities Surveyed (Percent Occupied)		
	Total Lots	Occupied	Occupancy Rate
Region 1 High Plains	112	3	97.3%
Region 11 South Texas Border	797	94	88.2%
Region 12 West Texas	401	27	93.3%
Balance of State Region	40	8	80.0%

Source: Bowen National Research
Note: Data is limited to only the counties that met the farmworker county designation

Overall, of the 1,350 home lots included in our survey areas, 1,218 are occupied, yielding a combined occupancy rate of 90.2%. It is significant that only one of the four regions has occupancy rates below 88.2%. Region 1 has the highest occupancy rate of 97.3%.

For-Sale Housing Alternatives

A total of 2,480 available for-sale housing units were identified within the 49 subject rural farmworker counties falling within the four study areas. The largest share of for-sale housing is in Balance of State Region which contains 1,402 for-sale housing units, or 56.5% of all housing units identified in the study areas. The distribution of for-sale housing by region is summarized in the following table:

	Available For-Sale Housing by Region		
	Units	Percent	Avg. Price
Region 1 (High Plains)	387	15.6%	$111,343
Region 11 (South Texas Border)	505	20.3%	$143,380
Region 12 (West Texas)	185	7.5%	$120,611
Balance of State Region	1,403	56.6%	$116,317
Total	2,480	100.0%	$121,372

Source: Bowen National Research
Note: Data is limited to only the counties that met the farmworker county designation

The overall average price of for-sale housing is $121,372. Region 11 has the highest average price among the study areas at $143,380, while the lowest average price of $111,343 is in Region 1.

The available for-sale housing stock by price point for each of the four regions is summarized as follows:

	Available For-Sale Housing by Price Point							
	Less Than $100k		$100,000-$139,999		$139,999-$199,999		$200,000-$300,000	
	Units	Avg. Price	Units	Avg. Price	Units	Avg. Price	Units	Avg. Price
Region 1 (High Plains)	208	$66,510	70	$122,247	79	$169,251	30	$244,253
Region 11 (South Texas Border)	160	$70,576	107	$119,880	133	$167,358	105	$247,896
Region 12 (West Texas)	91	$61,675	27	$123,048	40	$167,622	27	$247,166
Balance of State Region	705	$63,714	264	$122,541	273	$169,737	161	$245,871
Total	1,164	$64,997	468	$121,918	525	$168,900	323	$246,487

Source: Bowen National Research
Note: Data is limited to only the counties that met the farmworker county designation

Nearly one-half (46.9%) of the housing supply is priced below $100,000. As such, there appears to be a good base of available for-sale product among low-end priced product that may represent a viable option for lower income households. It is likely that much of this product is lower-quality housing that in all likelihood would require some level of repairs. Region 11 appears to have the most balanced supply of product by price point, with 31.7% of product priced below $100,000, 21.1% priced between $100,000 and $139,999, 26.3% priced between $140,000 and $199,999, and the remaining 20.8% priced over $200,000. As such, Region 11 would appear to have the best ability to draw from a wide range of household income levels. Region 12 has the least amount (91 units) of available product priced below $100,000, indicating a limited supply of affordable for-sale housing.

F. STAKEHOLDER INTERVIEWS & BARRIERS TO DEVELOPMENT

Stakeholder interviews were conducted with over 50 local, county and regional representatives across four rural farmworker regions, as well as stakeholders who address farmworker housing issues on a statewide basis. The regions identified consist of counties within regions 1, 11, and 12, that contain a large number of farmworkers as identified in the "Migrant and Seasonal Farmworker Enumeration Profile Study of Texas" from September of 2000 and that have also been identified as rural counties. The fourth region is the "balance of the state" which includes rural counties identified to have large numbers of farmworkers but that are scattered throughout the remainder of the state. Opinions on farmworker housing issues were sought from many disciplines throughout the housing industry including local, county, regional and statewide government officials, developers, housing authorities, and farmworker housing experts. With the vast size and diverse nature of the farming industry throughout the state of Texas, these interviews provided valuable information allowing us to supplement statistical analysis with local insight and perspectives on those factors that influence and impact development of housing for farmworkers in rural Texas.

The following summarizes the barriers to development identified for each of the four study regions.

Region 1 Barriers

Lack of funding resources, lack of community support and strict compliance regulations for migrant labor housing facilities were all indicated by stakeholders as barriers to providing farmworker housing in Region 1. The state currently does not have a program geared directly toward addressing issues of affordable farmworker designated housing. The development of a farmworker specific program or a funding set-aside within an existing program would go a long way toward financing additional farmworker housing. Timing is also a tremendous problem since USDA requires leveraged funds, but the Tax Credit awards are not announced in time to demonstrate leverage on the USDA application. Local communities have a "make or break" role in the development of farmworker housing. Local support is required for funding, especially for Tax Credits where it is part of the scoring criteria. In various communities throughout Texas, lack of local support has derailed planned developments. Many of the migrant labor housing facility owners/operators mentioned the difficulties with maintaining on site housing facilities in compliance with inspection regulations as they sit vacant for much of the year.

Region 11 Barriers

Lack of infrastructure, lack of available credit sources for farmworkers seeking homeownership, and lack of financing options with set asides specifically for farmworkers are all barriers to housing development in the region according to representatives.

Many of the rural counties in the region do not have the infrastructure in place to support already existing housing development. In particular there is a need for water and sewage treatment.

With credit being extremely tight and acceptable credit scores for home financing being 620 and up, many farmworkers are unable to obtain financing. Credit issues may not necessarily be due to bad credit, but to the lack of credit in general as farmworkers are typically a "cash culture", according to officials.

Developers indicated that there is little incentive to develop farmworker housing as there are no specific set aside funds or scoring incentives associated with this type of development.

Region 12 Barriers

Lack of funding resources, lack of available farmworker data and strict compliance regulations for migrant labor housing facilities were indicated by stakeholders as barriers to providing farmworker housing in Region 12. According to housing providers, little incentive is provided to build farmworker housing in general. An issue with identifying the number of farmworkers in a given area and identifying the quantity of additional farmworker housing units needed is also a major barrier to development. Many of those associated with the migrant labor housing facilities mentioned the difficulties with maintaining on-site housing facilities in compliance with statutory regulations. Some individuals indicated that state and federal regulations related to migrant labor housing facilities seem to conflict with each other or lack specific instructions for certain categories. The specific items are discussed in greater detail in Section VI of this report.

Balance of State Region Barriers

Lack of funding resources, lack of community support and lack of available farmworker data are all barriers to farmworker housing development in the balance of the state. According to developers, little incentive is provided to build farmworker housing in general. There is an issue with identifying the number of farmworkers in any given area, but with the balance of the state being such a diverse region representatives state that it is far more difficult to identify the areas of greatest need and to identify the most efficient means of addressing that demand. Community support is also an issue often faced by developers with regard to farmworker designated housing. In particular with regard to LIHTC projects, lack of support from the local community can sideline a project as community support is part of the scoring criteria.

G. HOUSING DEMAND ESTIMATES

We quantified farmworker housing needs that may exist in each study area by comparing the number of farmworkers with the number of housing units specifically designated for the farmworker population. A variety of data sources were used to estimate the number of farmworkers including the Census of Agriculture, the National Agricultural Worker Survey, the Migrant and Seasonal Farmworker Enumeration Profiles study, Department of Labor statistics, and estimates of Bowen National Research. The inventory of farmworker housing was determined through identification and telephone survey of farmworker-designated housing from TDHCA's list of licensed migrant labor housing facilities and USDA's farmworker housing projects funded through the 514 and 516 programs. The estimated farmworkers are then compared with the farmworker housing capacity in each market to determine the gap that might exists in each market for farmworker housing.

The following table summarizes the farmworker housing gap analysis that considers the housing capacity of migrant labor housing facilities and the number of low-income farmworkers by study region:

	Farmworker Housing Gap Estimates		
	Low-Income Farmworkers ($30,000)	Farmworker Housing Capacity	Housing Gap
Region 1 High Plains	9,967	1,356	8,611
Region 11 South Texas Border	4,374	984	3,390
Region 12 West Texas	4,358	197	4,161
Balance of State	12,369	0	12,369
Total	31,068	2,537	28,531

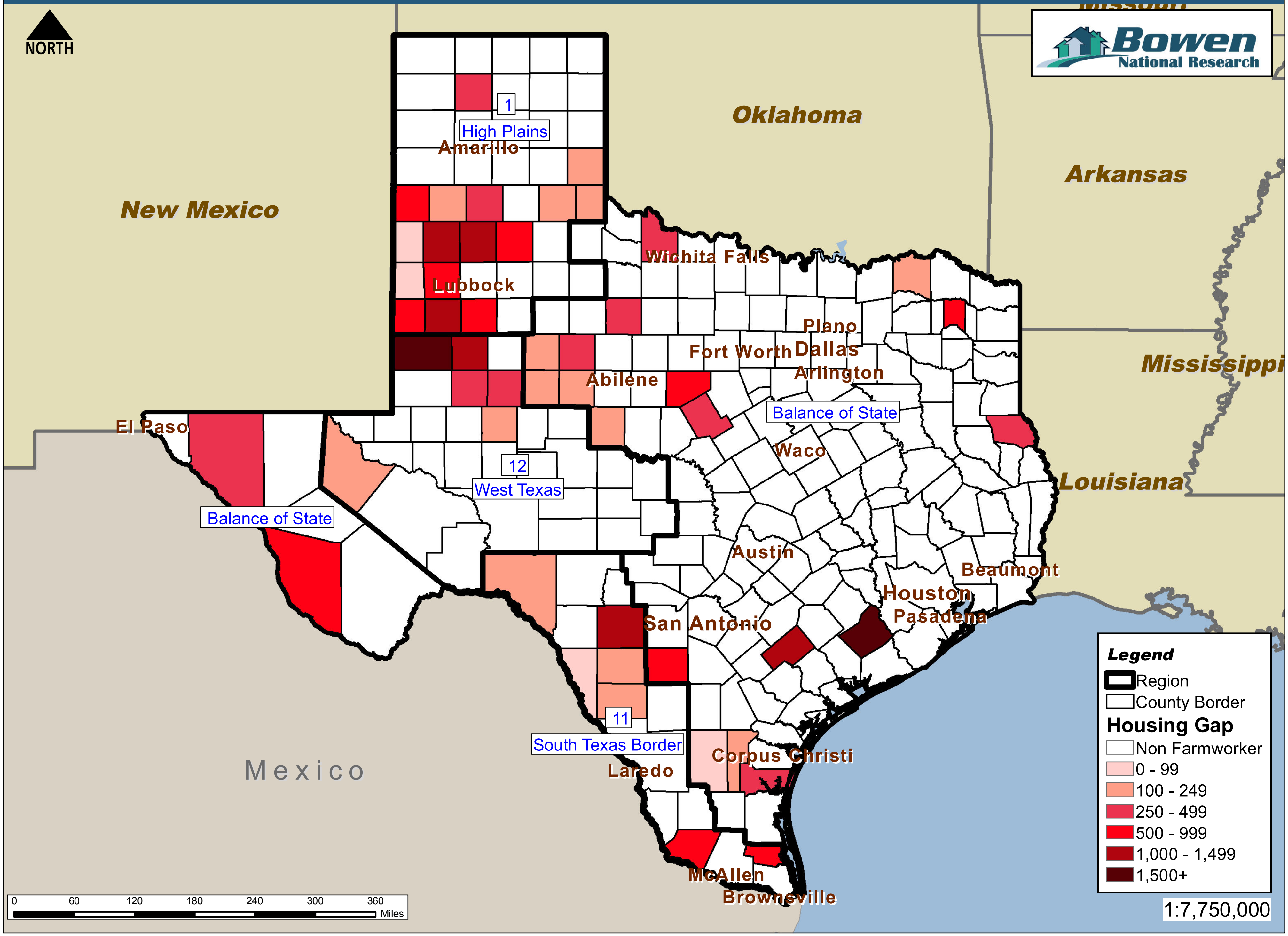
Note: Data is limited to only the counties that met the farmworker county designation

As the preceding table illustrates, 28,531 farmworkers in the counties within the study regions are not housed in farmworker-designated housing. The Balance of State region has the largest farmworker housing gap, with 12,369 farmworkers not housed in farmworker-designated housing. While there are farmworker housing units in the region, none of them fall within any of the 20 counties studied within the region. Certainly, these farmworkers are being housed in other rental alternatives throughout the region; however, none of these farmworkers are living in farmworker-designated housing. As a result, many of these farmworkers are likely paying a higher share of their income towards rents than those living in farmworker-designated housing. Region 1, despite its offering the largest capacity (1,356) of farmworker-designated housing, has a housing gap deficit of 8,611. While the housing gaps are smaller in regions 11 and 12, these regions' housing gaps of 3,390 (region 11) and 4,161 (region 12) are significant and indicate that 77.5% to 95.4% of all farmworkers are living in non-farmworker housing.

A regional summary that includes estimated housing gaps by each county evaluated in this report is included beginning on page VII-4.

The map on the following page illustrates the farmworker housing gap by study county. Counties shaded in darker red indicate the greater housing gaps.

Farmworker Counties: Housing Gap



H. RECOMMENDATIONS

The following is a summary of recommendations as they relate to policies, procedures and programs to implement or modify, in an effort to encourage and support the development of affordable housing for farmworkers in rural Texas. These recommendations should be considered as the bases for establishing a more developed set of programs and policies that ultimately work towards the possible establishment of a farmworker-specific housing program. It should be noted that many of the recommendations that are part of the Texas Rural Housing Analysis completed by Bowen National Research are applicable to the farmworker community, but are only cited in the recommendations below if there are farmworker-related components that require specific acknowledgement.

1.) **Modify and/or Clarify Farmworker Housing Facilities Compliance Requirements:** Some farmworker housing providers or potential providers of farmworker housing indicated that the lack of clarity of farmworker housing building and maintenance compliance requirements deterred them from development of such housing. All migrant and seasonal farmworker housing is subject to Federal building and maintenance regulations, while only those projects that are licensed by the Texas Department of Housing and Community Affairs (TDHCA) to house migrant farmworkers must comply with state regulations. As such, only the TDHCA licensed migrant labor housing projects have duel compliance requirements that do not always coincide with each other. Compliance provisions and development regulations should be modified to add consistency between Federal and state regulations and/or clarifications and guidance should be given to the development community as to the regulations that must be followed for migrant housing facilities. Consideration should also be given to better promote the resources for getting assistance and/or guidance on compliance issues. It should be noted that 19 projects were identified in the study areas that are licensed as migrant labor housing by the Texas Department of Housing and Community Affairs (TDHCA) and of which all would have the duel (Federal and state) compliance requirements.

2.) Consider Raising Development Standards to Enable Farmworker Projects to be Eligible for Low-Income Housing Tax Credits: Many typical farmworker housing projects/units do not meet the minimum design standards that would make them eligible for Low-Income Housing Tax Credits and, therefore, developers of farmworker housing cannot access financing through the Tax Credit program. It is recommended that developers of farmworker housing be encouraged to meet design standards for farmworker housing that would create housing units that meet the LIHTC program requirements.

3.) **Consider Providing Assistance and/or Creating Incentives to Encourage Developers to Actively Market Non-Farmworker Housing to Farmworkers:** Given that the existing housing stock in many rural counties has some capacity to accommodate additional renters, government entities should explore ways to assist and/or create incentives for developers of existing or planned non-farmworker housing to market their projects to farmworkers. This would help meet some farmworker housing needs without adding new units to markets.

4.) **Consider Establishing a Pre-Development Loan Program for Potential Rural Farmworker Housing Projects:** Consideration should be given to establishing a low interest loan program for providers of farmworker housing for predevelopment activity such as costs associated with rezoning, title searches, legal and audit fees, appraisals and market studies, insurance fees, and other various fees. Predevelopment loan programs that could serve as models are offered in California and Florida (see case studies).

5.) **Explore Funding Mechanisms for the Maintenance of Seasonally Occupied Migrant labor housing facilities:** Maintenance and code compliance for operators of Migrant labor housing facilities presents a challenge as many of these facilities are unoccupied for much of the year. Upkeep on these structures can be costly and along with the inherent uncertainties associated with the agriculture industry, these costs can become prohibitive. As noted in the best practices section of this report, other states and local communities have developed strategies to address this issue. For example, involvement of the community/region may assist in addressing this issue. As in the Napa Valley Model growers working in conjunction with the local housing authority, farmworker advocate groups as well as state and local government, partnered to provide a pool of funding administered by the housing authority to fund upkeep of seasonal farmworker housing. A program similar to this in Texas should be considered.

6.) **Explore Developing Rental/Operating Subsidies to Sustain Rural Farmworker Projects:** Operating farmworker housing projects in rural Texas is sometimes considered a risk in the development community due to the fluctuating occupancies due to the nature of the agricultural industry (seasonal work, migrant farmworkers, etc.) and the vulnerability this specific type of housing has to climatic changes, such as droughts. Consideration should be given to establishing rental and operating subsidies to help farmworker housing during periods of low occupancies.

7.) **Expand Education and Outreach Efforts to Public that Emphasizes Rural Farmworker Housing Development:** Common development barriers cited by stakeholders included the lack of information as to the specific housing needs of farmworkers by geographic area, the processes for developing farmworker housing, and the lack of acceptance of local communities to farmworker housing. Public sector education and outreach efforts should work to assist the development community in understanding farmworker housing needs and rural development nuances, and to help reduce apprehension some communities have to farmworker housing. Establishment of an information clearinghouse that focuses on farmworkers and farmworker housing development, and provides technical assistance, could be very beneficial to housing providers, particularly smaller, non-profit entities with limited staffing resources. Establishing a forum which brings farmworker stakeholders and public sectors together, either through regular meetings or an annual conference that specifically includes public sector entities and agriculture industry leaders should be considered. Finally, development of a farmworker development and financing manual/handbook similar to that developed in Oregon (see Oregon case study) should be considered.

8.) **Continue to Monitor Farmworker Mobility Patterns, Demographics, Agricultural Trends, and Housing Market Conditions:** Because of the unique nature of the farm labor workforce, it will be important to periodically monitor farm labor migration patterns and to survey the farmworker-designated housing stock for occupancy characteristics and trends. A re-evaluation of farmworker housing needs on a region and county level shortly after the completion of periodically released farmworker data (i.e. the 2012 Census of Agriculture that will be conducted in 2013) should be conducted on established intervals (every three years or five years are recommended).

9.) **Consolidate Housing Program Requirements and Coordinate Funding Timelines:** One of the barriers to development that was often cited during our research and interviews was that many developers must rely upon a variety of financing resources (i.e. USDA, TDHCA and HUD) to make projects financially feasible, yet each funding source has its own set of regulations and funding cycles, which are not coordinated with other agencies for easy use. Public funding entities need to consolidate their program regulations and coordinate their funding cycles to facilitate housing development and reduce the cost and time of compliance activities. In order to assist farmworker housing providers with securing federal funding through the USDA 514/516 program, early funding commitments from the LIHTC program, for example, would help housing providers to leverage various funding sources.

III. DEMOGRAPHIC ANALYSIS

This section of the report presents two categories of demographic data. First, we provide overall demographics of each study area that includes all persons and households within the corresponding markets, regardless of whether or not they are associated with the agricultural industry. This data is based on the U.S. Census, and estimates provided by ESRI, Urban Decision Group, and Bowen National Research. The second data set reported is exclusive to farmworkers and the agriculture industry. A variety of data sources is used in our presentation of farmworker data, which are discussed in greater detail later in this section.

The demographics presented and evaluated in this report are limited to counties that contain more than 1,000 "Migrant/Seasonal Farmworkers and Non-Farmworkers", according to the Migrant and Seasonal Farmworker Enumeration Profile Study of Texas (September 2000). Pursuant to the TDHCA Request for Proposal and whenever possible, the demographic data is presented and evaluated on four TDHCA designated regions: TDHCA Regions 1 (High Plains), 11 (South Texas Border), 12 (West Texas) and the "Balance of the State". In some cases, farmworker data is limited to national estimates and are not available on a state, regional or county level.

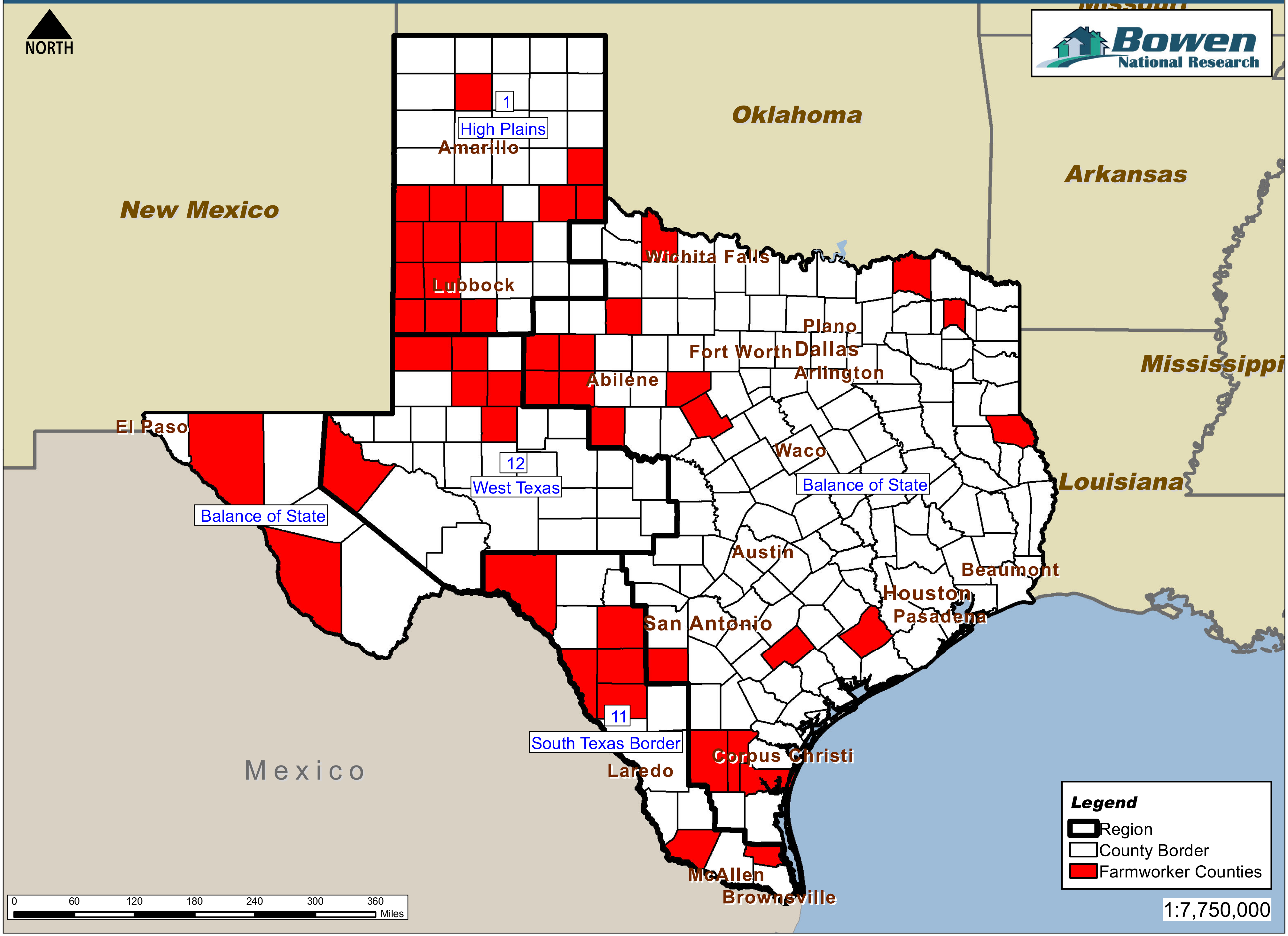
A migrant farmworker is generally understood as someone who has left his or her permanent residence, or homebase, to work for months or an entire season in agriculture. A seasonal farmworker also works temporarily, or seasonally, in agriculture, but returns to his or her permanent residence each day after work. Both groups work in the same types of jobs, under the same conditions and often share language and culture. For statutory definitions of migrant and seasonal farmworkers, please see Section I of this report.

Based on the data provided in the report entitled: *Migrant and Seasonal Farmworker Enumeration Profile Study of Texas (September 2000*), there were 71 counties in Texas that met the selection criteria established in TDHCA's Request for Proposal. The following table lists the 49 counties that fall within each of the four study regions **(note: counties that did not meet this study's criteria were excluded from this analysis and the listing below)**:

Counties with 1,000+ Farmworkers by TDHCA Region			
Region 1 High Plains			
Bailey	Collingsworth	Hockley	Parmer
Castro	Floyd	Lamb	Swisher
Childress	Hale	Lynn	Terry
Cochran	Hall	Moore	Yoakum
Region 11 South Texas Border			
Dimmit	Starr	Val Verde	Zavala
Maverick	Uvalde	Willacy	
Region 12 West Texas			
Dawson	Glasscock	Martin	-
Gaines	Howard	Reeves	-
Balance of State			
Comanche	Frio	Lamar	Scurry
DeWitt	Haskell	Mitchell	Shelby
Duval	Hudspeth	Nolan	Titus
Eastland	Jim Wells	Presidio	Wharton
Fisher	Kleberg	Runnels	Wilbarger

There are 16 counties in Region 1 (High Plains), seven counties in Region 11 (South Texas Border), six counties in Region 12 (West Texas) and 20 counties in the Balance of State Region. It is important to note that not every county within each region met the selection criterion for the purposes of this analysis, and as a result, many counties have been excluded from each region. The map on the following page illustrates the counties studied in this report and their corresponding region.

Texas Counties (Farmworker)



A. OVERALL DEMOGRAPHIC CHARACTERISTICS & TRENDS

The following is a summary of key findings from the demographic analysis of the study regions, as well as the overall state of Texas.

Overall Demographic Trends (Not Exclusive to Farmworkers)

Total Population - Region 11 has experienced positive population growth of 9.7% between 2000 and 2010 and is projected to increase by 2.9% over the next five years. Region 1 has experienced and is projected to experience a population decline. Region 12 and the Balance of State Region are projected to generally have stable populations between 2010 and 2015. Combined, the four study regions are projected to experience a minimal population increase of 0.2% between 2010 and 2015, while the state of Texas is projected to experience an 8.5% increase during this same time. It is not unusual to experience minimal changes in population.

Total Households - Over the past decade, all regions but Region 1 have had positive household growth trends. Region 11 experienced the greatest household growth between 2000 and 2010, increasing by 7,473 households, an increase of 12.0%. While Region 1 is projected to experience a household decline (2.0%) and Region 11 is projected to experience a household increase (3.1%), the remaining regions are projected to experience stagnant household bases through 2015. Overall, the four study regions are projected to experience an increase of 0.2% between 2010 and 2015. This is not unusual for rural areas, but is much slower than the overall projected household growth rate of 8.4% for the state of Texas.

Total Households by Age - All four study regions are projected to experience notable increases among older adult (age 55+) households, while most regions will experience growth among those between the ages of 25 to 34. These household growth trends by age are similar to state trends and indicate a likely growing need for housing for young families and seniors.

Hispanic Population - An evaluation of the Hispanic and non-Hispanic population within the four study regions indicate that over one-third (37.6%) of the population is considered Hispanic. Region 11 (South Texas Border Region) has a significantly higher share (88.2%) of its population considered Hispanic, which is not surprising given its proximity to the U.S.-Mexican border.

The following is a distribution of various demographic data for each region and county. It is important to note that some numbers and/or percentages may differ slightly within a single column or row, or from region to region or county to county due to rounding.

1. POPULATION TRENDS

		Year			
		1990 (Census)	2000 (Census)	2010 (Census)	2015 (Projected)
Region 1 High Plains	Population	180,997	180,224	177,908	174,332
	Population Change	-	-773	-2,316	-3,576
	Percent Change	-	-0.4%	-1.3%	-2.0%
Region 11 South Texas Border	Population	179,253	213,601	234,317	241,085
	Population Change	-	34,348	20,716	6,768
	Percent Change	-	19.2%	9.7%	2.9%
Region 12 West Texas	Population	83,068	82,366	86,179	85,490
	Population Change	-	-702	3,813	-689
	Percent Change	-	-0.8%	4.6%	-0.8%
Balance of State Region	Population	365,862	384,718	390,150	389,451
	Population Change	-	18,856	5,432	-699
	Percent Change	-	5.2%	1.4%	-0.2%
Sum of Regions	Population	809,179	860,908	888,554	890,359
	Population Change	-	51,729	27,646	1,805
	Percent Change	-	6.4%	3.2%	0.2%
State of Texas	Population	16,986,510	20,851,820	25,145,561	27,291,474
	Population Change	-	3,865,310	4,293,741	2,145,913
	Percent Change	-	22.8%	20.6%	8.5%

Source: 2000 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

Region 11 has experienced positive population growth of 9.7% between 2000 and 2010 and is projected to increase by 2.9% over the next five years. Region 1 has experienced and is projected to experience a population decline. Region 12 and the Balance of State Region are projected to generally have stable populations between 2010 and 2015.

The population bases by age are summarized as follows:

		Population by Age						
		<25	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75+
Region 1 High Plains	2000	71,894 39.9%	21,619 12.0%	25,728 14.3%	20,396 11.3%	15,529 8.6%	13,356 7.4%	11,702 6.5%
	2010	67,715 38.1%	22,312 12.5%	20,880 11.7%	23,010 12.9%	19,120 10.7%	12,546 7.1%	12,325 6.9%
	2015	65,781 37.7%	21,655 12.4%	19,997 11.5%	19,979 11.5%	20,989 12.0%	14,147 8.1%	11,784 6.8%
Region 11 South Texas Border	2000	95,202 44.6%	29,351 13.7%	27,725 13.0%	22,959 10.7%	16,094 7.5%	12,777 6.0%	9,493 4.4%
	2010	101,764 43.4%	30,399 13.0%	27,435 11.7%	26,911 11.5%	22,240 9.5%	14,123 6.0%	11,446 4.9%
	2015	104,017 43.1%	31,715 13.2%	26,047 10.8%	25,842 10.7%	24,337 10.1%	17,414 7.2%	11,713 4.9%
Region 12 West Texas	2000	30,688 37.3%	11,112 13.5%	12,723 15.4%	9,993 12.1%	6,910 8.4%	6,006 7.3%	4,934 6.0%
	2010	30,481 35.4%	12,594 14.6%	11,672 13.5%	11,255 13.1%	8,977 10.4%	5,669 6.6%	5,531 6.4%
	2015	29,727 34.8%	12,931 15.1%	11,118 13.0%	10,052 11.8%	9,773 11.4%	6,549 7.7%	5,341 6.2%
Balance of State Region	2000	141,904 36.9%	47,317 12.3%	54,051 14.0%	47,245 12.3%	35,911 9.3%	29,769 7.7%	28,521 7.4%
	2010	137,044 35.1%	49,428 12.7%	47,081 12.1%	51,745 13.3%	45,582 11.7%	30,047 7.7%	29,224 7.5%
	2015	135,688 34.8%	48,708 12.5%	46,185 11.9%	46,303 11.9%	48,786 12.5%	35,107 9.0%	28,673 7.4%
Sum of Regions	2000	339,687 39.5%	109,399 12.7%	120,227 14.0%	100,593 11.7%	74,444 8.6%	61,908 7.2%	54,650 6.3%
	2010	337,003 37.9%	114,733 12.9%	107,068 12.0%	112,920 12.7%	95,919 10.8%	62,384 7.0%	58,527 6.6%
	2015	335,213 37.6%	115,010 12.9%	103,348 11.6%	102,175 11.5%	103,885 11.7%	73,218 8.2%	57,511 6.5%
State of Texas	2000	8,085,640 38.8%	3,162,083 15.2%	3,322,238 15.9%	2,611,137 12.5%	1,598,190 7.7%	1,142,608 5.5%	929,924 4.5%
	2010	9,368,816 37.3%	3,653,545 14.5%	3,417,561 13.6%	3,485,240 13.9%	2,617,205 10.4%	1,431,667 5.7%	1,171,525 4.7%
	2015	10,067,025 36.9%	4,026,446 14.8%	3,562,076 13.1%	3,432,406 12.6%	3,052,202 11.2%	1,897,495 7.0%	1,253,824 4.6%

Source: 2000 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

Most of the population growth in each region is projected to increase among persons age 55 and older. The Balance of State Region is projected to experience the greatest senior population growth. Region 11 has had and is projected to have positive growth among the population under the age of 35. These trends are comparable to state growth trends.

The population density for 1990, 2000, 2010 (Census) and 2015 (projected) are summarized as follows:

		Year			
		1990 (Census)	2000 (Census)	2010 (Census)	2015 (Projected)
Region 1 High Plains	Population	180,997	180,224	177,908	174,332
	Area in Square Miles	14,216.55	14,216.55	14,216.55	14,216.55
	Density	12.7	12.7	12.5	12.3
Region 11 South Texas Border	Population	179,253	213,601	234,317	241,085
	Area in Square Miles	10,455.81	10,455.81	10,455.81	10,455.81
	Density	17.1	20.4	22.4	23.1
Region 12 West Texas	Population	83,068	82,366	86,179	85,490
	Area in Square Miles	7,758.31	7,758.31	7,758.31	7,758.31
	Density	10.7	10.6	11.1	11.0
Balance of State Region	Population	365,862	384,718	390,150	389,451
	Area in Square Miles	25,621.88	25,621.88	25,621.88	25,621.88
	Density	14.3	15.0	15.2	15.2
Sum of Regions	Population	809,179	860,908	888,554	890,359
	Area in Square Miles	58,052.55	58,052.55	58,052.55	58,052.55
	Density	13.9	14.8	15.3	15.3
State of Texas	Population	16,986,510	20,851,820	25,145,561	27,291,474
	Area in Square Miles	261,797.12	261,797.12	261,797.12	261,797.12
	Density	64.9	79.6	96.0	104.2

Source: 2000 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

Based on the 2010 Census, all regions have population densities under 23.0 persons per square mile and are considered rural. Region 11 has the highest population density, at 22.4.

2. HOUSEHOLD TRENDS

Household trends are summarized as follows:

		Year			
		1990 (Census)	2000 (Census)	2010 (Census)	2015 (Projected)
Region 1 High Plains	Households	62,506	61,913	61,234	60,005
	Household Change	-	-593	-679	-1,229
	Percent Change	-	-0.9%	-1.1%	-2.0%
Region 11 South Texas Border	Households	50,956	62,528	70,001	72,143
	Household Change	-	11,572	7,473	2,142
	Percent Change	-	22.7%	12.0%	3.1%
Region 12 West Texas	Households	27,988	26,993	27,253	27,057
	Household Change	-	-995	260	-196
	Percent Change	-	-3.6%	1.0%	-0.7%
Balance of State Region	Households	131,718	138,723	142,021	141,859
	Household Change	-	7,005	3,298	-162
	Percent Change	-	5.3%	2.4%	-0.1%
Sum of Regions	Households	273,168	290,157	300,509	301,063
	Household Change	-	16,989	10,352	554
	Percent Change	-	6.2%	3.6%	0.2%
State of Texas	Households	6,070,937	7,393,354	8,922,933	9,673,279
	Household Change	-	1,322,417	1,529,579	750,346
	Percent Change	-	21.8%	20.7%	8.4%

Source: 2000 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

Over the past decade, all regions but Region 1 have had positive household growth trends. Region 11 experienced the greatest household growth between 2000 and 2010, increasing by 7,473 households, an increase of 12.0%. While Region 1 is projected to experience a household decline (2.0%) and Region 11 is projected to experience a household increase (3.1%), the remaining regions are projected to experience stagnant household bases through 2015.

The household bases by age are summarized as follows:

		Households by Age						
		<25	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75+
Region 1 High Plains	2000	3,489 5.6%	9,604 15.5%	13,380 21.6%	10,723 17.3%	8,892 14.4%	8,118 13.1%	7,707 12.4%
	2010	3,289 5.4%	9,696 15.8%	10,173 16.6%	12,031 19.6%	10,335 16.9%	7,574 12.4%	8,137 13.3%
	2015	2,861 4.8%	9,658 16.1%	9,650 16.1%	10,370 17.3%	11,233 18.7%	8,475 14.1%	7,758 12.9%
Region 11 South Texas Border	2000	2,502 4.0%	10,783 17.2%	13,665 21.9%	11,881 19.0%	9,177 14.7%	8,309 13.3%	6,211 9.9%
	2010	2,996 4.3%	11,427 16.3%	13,157 18.8%	14,017 20.0%	12,402 17.7%	8,599 12.3%	7,402 10.6%
	2015	2,852 4.0%	12,100 16.8%	12,379 17.2%	13,353 18.5%	13,427 18.6%	10,490 14.5%	7,540 10.5%
Region 12 West Texas	2000	1,265 4.7%	3,988 14.8%	5,647 20.9%	4,856 18.0%	3,899 14.4%	4,090 15.2%	3,248 12.0%
	2010	1,359 5.0%	3,993 14.7%	4,527 16.6%	5,355 19.6%	4,867 17.9%	3,572 13.1%	3,581 13.1%
	2015	1,167 4.3%	4,261 15.7%	4,194 15.5%	4,664 17.2%	5,255 19.4%	4,075 15.1%	3,440 12.7%
Balance of State Region	2000	7,038 5.1%	20,102 14.5%	27,873 20.1%	25,381 18.3%	19,965 14.4%	19,198 13.8%	19,166 13.8%
	2010	6,772 4.8%	20,816 14.7%	23,120 16.3%	27,543 19.4%	25,589 18.0%	18,925 13.3%	19,256 13.6%
	2015	6,160 4.3%	20,930 14.8%	22,527 15.9%	24,414 17.2%	27,125 19.1%	21,900 15.4%	18,803 13.3%
Sum of Regions	2000	14,294 4.9%	44,477 15.3%	60,565 20.9%	52,841 18.2%	41,933 14.5%	39,715 13.7%	36,332 12.5%
	2010	14,416 4.8%	45,932 15.3%	50,977 17.0%	58,945 19.6%	53,193 17.7%	38,670 12.9%	38,376 12.8%
	2015	13,041 4.3%	46,949 15.6%	48,751 16.2%	52,802 17.5%	57,040 18.9%	44,940 14.9%	37,541 12.5%
State of Texas	2000	477,063 6.5%	1,430,025 19.3%	1,800,482 24.4%	1,455,189 19.7%	924,316 12.5%	718,080 9.7%	588,199 8.0%
	2010	535,328 6.0%	1,626,238 18.2%	1,777,887 19.9%	1,914,271 21.5%	1,485,204 16.6%	862,658 9.7%	721,347 8.1%
	2015	542,204 5.6%	1,818,970 18.8%	1,834,258 19.0%	1,869,304 19.3%	1,710,141 17.7%	1,127,683 11.7%	770,719 8.0%

Source: 2000 and 2010 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

All regions are projected to experience notable increases among older adult (age 55+) households, while most regions will experience growth among those between the ages of 25 to 34.

The renter household sizes by tenure within the subject regions, based on the 2000 Census and 2010 estimates, were distributed as follows:

		Persons Per Renter Household					
		1-Person	2-Person	3-Person	4-Person	5-Person	Total
Region 1 High Plains	2000	4,455 25.2%	4,005 22.7%	3,225 18.3%	2,881 16.3%	3,098 17.5%	17,664 100.0%
	2010	5,036 26.7%	4,186 22.2%	3,420 18.1%	3,011 16.0%	3,224 17.1%	18,877 100.0%
	2015	4,778 26.9%	3,843 21.7%	3,197 18.0%	2,850 16.1%	3,071 17.3%	17,740 100.0%
Region 11 South Texas Border	2000	3,444 20.0%	3,388 19.7%	3,123 18.2%	3,083 17.9%	4,145 24.1%	17,184 100.0%
	2010	4,387 22.0%	3,753 18.8%	3,552 17.8%	3,502 17.6%	4,722 23.7%	19,916 100.0%
	2015	4,512 21.9%	3,700 18.0%	3,705 18.0%	3,661 17.8%	4,989 24.3%	20,567 100.0%
Region 12 West Texas	2000	2,388 33.0%	1,444 20.0%	1,154 16.0%	1,105 15.3%	1,138 15.7%	7,228 100.0%
	2010	2,715 35.2%	1,526 19.8%	1,214 15.7%	1,117 14.5%	1,138 14.8%	7,709 100.0%
	2015	2,662 35.3%	1,457 19.3%	1,209 16.0%	1,099 14.6%	1,120 14.8%	7,546 100.0%
Balance of State Region	2000	12,561 32.1%	9,008 23.0%	6,956 17.8%	5,506 14.1%	5,111 13.1%	39,142 100.0%
	2010	14,728 34.5%	9,257 21.7%	7,524 17.6%	5,871 13.7%	5,365 12.6%	42,744 100.0%
	2015	14,465 34.9%	8,682 20.9%	7,269 17.5%	5,779 13.9%	5,305 12.8%	41,501 100.0%
Sum of Regions	2000	22,848 28.1%	17,845 22.0%	14,457 17.8%	12,575 15.5%	13,492 16.6%	81,218 100.0%
	2010	26,865 30.1%	18,721 21.0%	15,710 17.6%	13,501 15.1%	14,449 16.2%	89,246 100.0%
	2015	26,417 30.2%	17,682 20.2%	15,380 17.6%	13,389 15.3%	14,485 16.6%	87,353 100.0%
State of Texas	2000	900,225 33.6%	675,181 25.2%	436,715 16.3%	335,107 12.5%	329,168 12.3%	2,676,395 100.0%
	2010	1,169,147 36.1%	766,951 23.7%	514,648 15.9%	392,300 12.1%	394,534 12.2%	3,237,580 100.0%
	2015	1,276,764 36.4%	807,734 23.0%	558,721 15.9%	431,217 12.3%	437,636 12.5%	3,512,073 100.0%

Source: 2000 and 2010 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

The owner household sizes within the subject regions, based on the 2000 Census and 2010 estimates, were distributed as follows:

		Persons Per Owner Household					
		1-Person	2-Person	3-Person	4-Person	5-Person	Total
Region 1 High Plains	2000	8,953 20.2%	15,710 35.5%	6,739 15.2%	6,690 15.1%	6,157 13.9%	44,248 100.0%
	2010	8,830 20.8%	15,221 35.9%	6,517 15.4%	6,183 14.6%	5,606 13.2%	42,357 100.0%
	2015	8,845 20.9%	15,338 36.3%	6,459 15.3%	6,073 14.4%	5,550 13.1%	42,265 100.0%
Region 11 South Texas Border	2000	5,949 13.1%	11,171 24.6%	7,877 17.4%	8,558 18.9%	11,790 26.0%	45,344 100.0%
	2010	6,790 13.6%	12,494 24.9%	8,605 17.2%	9,075 18.1%	13,121 26.2%	50,085 100.0%
	2015	6,918 13.4%	12,480 24.2%	8,890 17.2%	9,466 18.4%	13,822 26.8%	51,576 100.0%
Region 12 West Texas	2000	3,942 19.9%	7,047 35.7%	3,173 16.1%	2,860 14.5%	2,744 13.9%	19,765 100.0%
	2010	3,952 20.2%	7,044 36.0%	3,178 16.3%	2,886 14.8%	2,484 12.7%	19,544 100.0%
	2015	3,997 20.5%	7,030 36.0%	3,158 16.2%	2,859 14.7%	2,467 12.6%	19,511 100.0%
Balance of State Region	2000	21,385 21.5%	35,540 35.7%	16,225 16.3%	14,424 14.5%	12,007 12.1%	99,581 100.0%
	2010	21,253 21.4%	35,228 35.5%	16,820 16.9%	14,348 14.5%	11,628 11.7%	99,277 100.0%
	2015	21,701 21.6%	35,408 35.3%	17,012 17.0%	14,397 14.3%	11,840 11.8%	100,358 100.0%
Sum of Regions	2000	40,228 19.3%	69,467 33.2%	34,014 16.3%	32,532 15.6%	32,697 15.6%	208,939 100.0%
	2010	40,825 19.3%	69,988 33.1%	35,120 16.6%	32,492 15.4%	32,839 15.5%	211,263 100.0%
	2015	41,462 19.4%	70,257 32.9%	35,519 16.6%	32,795 15.3%	33,678 15.8%	213,710 100.0%
State of Texas	2000	837,449 17.8%	1,575,067 33.4%	831,761 17.6%	802,092 17.0%	670,590 14.2%	4,716,959 100.0%
	2010	1,008,796 17.7%	1,928,236 33.9%	1,024,767 18.0%	946,252 16.6%	777,302 13.7%	5,685,353 100.0%
	2015	1,098,415 17.8%	2,106,810 34.2%	1,108,772 18.0%	1,010,386 16.4%	836,823 13.6%	6,161,206 100.0%

Source: 2000 and 2010 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

The population by highest educational attainment within the subject regions, based on the ESRI estimates is distributed as follows:

		Less than 9th grade	High school, no diploma	High school graduate	Some College no degree	Associate degree	Bachelor's degree	Graduate degree	Total
Region 1 High Plains	Number	18,609	14,204	33,368	20,120	5,794	10,519	4,438	107,052
	Percent	17.4%	13.3%	31.2%	18.8%	5.4%	9.8%	4.1%	100.0%
Region 11 South Texas Border	Number	45,546	17,577	31,569	17,583	5,480	9,905	5,731	133,391
	Percent	34.1%	13.2%	23.7%	13.2%	4.1%	7.4%	4.3%	100.0%
Region 12 West Texas	Number	9,680	6,658	17,589	9,727	2,825	4,600	1,828	52,907
	Percent	18.3%	12.6%	33.2%	18.4%	5.3%	8.7%	3.5%	100.0%
Balance of State Region	Number	33,896	32,570	85,403	47,851	14,177	24,960	12,358	251,215
	Percent	13.5%	13.0%	34.0%	19.0%	5.6%	9.9%	4.9%	100.0%
Sum of Regions	Number	107,731	71,009	167,929	95,281	28,276	49,984	24,355	544,565
	Percent	19.8%	13.0%	30.8%	17.5%	5.2%	9.2%	4.5%	100.0%
State of Texas	Number	1,465,389	1,649,091	3,176,650	2,858,720	668,476	1,996,204	976,012	12,790,542
	Percent	11.5%	12.9%	24.8%	22.4%	5.2%	15.6%	7.6%	100.0%

Source: 2000 and 2010 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

While the distribution of education attainment was relatively even among each region, Region 11 had a disproportionately high share (47.3%) of its population not graduate from high school. Approximately 10% to 15% of the population within each region had a Bachelor's or Graduate's degree.

The population by race within the subject regions, based on the 2010 Census, is distributed as follows:

		White Alone	Black or African American Alone	American Indian and Alaska Native American	Asian Alone	Native Hawaiian and Other Pacific Islander Alone	Some Other Race Alone	Two or More Races	Total
Region 1 High Plains	Number	133,547	6,862	1,727	1,802	87	29,710	4,173	177,908
	Percent	75.1%	3.9%	1.0%	1.0%	0.0%	16.7%	2.3%	100.0%
Region 11 South Texas Border	Number	208,523	1,781	1,243	882	77	18,445	3,366	234,317
	Percent	89.0%	0.8%	0.5%	0.4%	0.0%	7.9%	1.4%	100.0%
Region 12 West Texas	Number	67,016	4,174	616	492	33	12,149	1,699	86,179
	Percent	77.8%	4.8%	0.7%	0.6%	0.0%	14.1%	2.0%	100.0%
Balance of State Region	Number	307,307	28,742	2,845	2,625	106	40,516	8,009	390,150
	Percent	78.8%	7.4%	0.7%	0.7%	0.0%	10.4%	2.1%	100.0%
Sum of Regions	Number	716,393	41,559	6,431	5,801	303	100,820	17,247	888,554
	Percent	80.6%	4.7%	0.7%	0.7%	0.0%	11.3%	1.9%	100.0%
State of Texas	Number	17,701,552	2,979,598	170,972	964,596	21,656	2,628,186	679,001	25,145,561
	Percent	70.4%	11.8%	0.7%	3.8%	0.1%	10.5%	2.7%	100.0%

Source: 2010 Census; ESRI; Urban Decision Group; Bowen National Research

With the exception of Region 11, all study regions have very comparable share of population by race. Region 11 is comprised of nearly 90% by White Alone designation.

According to the U.S. Census, the terms "Hispanic" or "Latino" refer to persons who trace their origin or descent to Mexico, Puerto Rico, Cuba, Spanish speaking Central and South America countries, and other Spanish cultures. Origin can be considered as the heritage, nationality group, lineage, or country of the person or the person's parents or ancestors before their arrival in the United States. People who identify their origin as Hispanic or Latino may be of any race. As such the below table shows the number of Hispanic or Latino population in each census designated race for the state of Texas.

		White Alone	Black or African American Alone	American Indian and Alaska Native American	Asian Alone	Native Hawaiian and Other Pacific Islander Alone	Some Other Race Alone	Two or More Races	Total
State of Texas	Total	17,701,552	2,979,598	170,972	964,596	21,656	2,628,186	679,001	25,145,561
	Hispanic	6,304,207	92,773	90,386	16,170	3,736	2,594,206	N/A	9,101,478

Source: 2010 Census; ESRI; Urban Decision Group; Bowen National Research

The table below summarizes the Hispanic and Non-Hispanic populations within the rural study regions of Texas.

Geography	Total Pop.	Total Hispanic Pop.	% Hispanic	Total Non-Hispanic Pop.	%. Non-Hispanic
Region 1 High Plains	177,908	89,987	50.6%	87,921	49.4%
Region 11 South Texas Border	234,317	206,623	88.2%	27,694	11.8%
Region 12 West Texas	86,179	39,752	46.1%	46,427	53.9%
Balance of State Region	390,150	160,289	41.1%	229,861	58.9%
Remaining Counties	24,257,007	8,964,270	37.0%	15,292,737	63.0%
Total	**25,145,561**	**9,460,921**	**37.6%**	**15,684,640**	**62.4%**

As the preceding table illustrates, over one-third of the total population is considered Hispanic within the subject rural counties in the four study regions. Region 11 (South Texas Border Region) has a disproportionately high share (88.2%) of Hispanic population, which is not surprising given that this region is located along the U.S.-Mexico border.

The population by ancestry within the subject regions, based on the 2000 Census, is distributed as follows:

	Top 5 Highest Nationality Shares						
	Nationality 1	Nationality 2	Nationality 3	Nationality 4	Nationality 5	Remaining Nationalities	Total
Region 1 High Plains	German (10.6%)	Irish (7.7%)	English (6.6%)	American (5.2%)	Scotch-Irish (1.6%)	68.3%	170,593
Region 11 South Texas Border	German (2.8%)	American (2.2%)	English (1.7%)	Irish 1.6%)	Italian (0.7%)	91.1%	230,999
Region 12 West Texas	German (10.6%)	Irish (7.1%)	English (6.0%)	American (5.1%)	Scottish (1.7%)	69.5%	78,146
Balance of State Region	German (10.9%)	Irish (8.4%)	American (7.9%)	English (6.1%)	Czech (2.3%)	64.4%	396,979
Sum of Regions	German (8.6%)	Irish (6.4%)	American (5.6%)	English (5.0%)	French (1.3%)	73.0%	876,717
State of Texas	German (10.4%)	Irish (7.5%)	English (7.0%)	American (5.5%)	French (2.3%)	67.3%	25,910,495

Source: 2000 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

It is notable that the largest share of population by nationality within each region is German. With the exception of Region 11, the German nationality represents over 10% of the population in each region. Region 11 had no nationality really dominate the population base.

Households by tenure are distributed as follows:

	Household Type	2000 (Census) Number	2000 (Census) Percent	2010 (Census) Number	2010 (Census) Percent	2015 (Projected) Number	2015 (Projected) Percent
Region 1 High Plains	Owner-Occupied	44,248	71.5%	42,357	69.2%	42,265	70.4%
	Renter-Occupied	17,664	28.5%	18,877	30.8%	17,740	29.6%
	Total	61,913	100.0%	61,234	100.0%	60,005	100.0%
Region 11 South Texas Border	Owner-Occupied	45,344	72.5%	50,085	71.5%	51,576	71.5%
	Renter-Occupied	17,184	27.5%	19,916	28.5%	20,567	28.5%
	Total	62,528	100.0%	70,001	100.0%	72,143	100.0%
Region 12 West Texas	Owner-Occupied	19,765	73.2%	19,544	71.7%	19,511	72.1%
	Renter-Occupied	7,228	26.8%	7,709	28.3%	7,546	27.9%
	Total	26,993	100.0%	27,253	100.0%	27,057	100.0%
Balance of State Region	Owner-Occupied	99,581	71.8%	99,277	69.9%	100,358	70.7%
	Renter-Occupied	39,142	28.2%	42,744	30.1%	41,501	29.3%
	Total	138,723	100.0%	142,021	100.0%	141,859	100.0%
Sum of Regions	Owner-Occupied	208,939	72.0%	211,263	70.3%	213,710	71.0%
	Renter-Occupied	81,218	28.0%	89,246	29.7%	87,353	29.0%
	Total	290,157	100.0%	300,509	100.0%	301,063	100.0%
State of Texas	Owner-Occupied	4,716,959	63.8%	5,685,353	63.7%	6,161,206	63.7%
	Renter-Occupied	2,676,395	36.2%	3,237,580	36.3%	3,512,073	36.3%
	Total	7,393,354	100.0%	8,922,933	100.0%	9,673,279	100.0%

Source: 2000 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

The share of owner- and renter-occupied households is nearly identical in each region. Owner-occupied households generally represent 70% of all occupied households, while renter-occupied households generally represent 30% of all occupied households. Statewide, the share (63.7%) of homeowners in 2010 is lower than the combined share (70.3%) for the four study regions. Given that it is often more difficult to develop large-scale multifamily rental housing in rural communities than in more developed areas, it is not surprising that the renter share is lower in the rural markets than for the overall state.

3. INCOME TRENDS

The distribution of households by income within each region is summarized as follows:

		Households Income						
		<$10,000	$10,000 - $19,999	$20,000 - $29,999	$30,000 - $39,999	$40,000 - $49,999	$50,000 - $59,999	$60,000+
Region 1 High Plains	2000	8,302 13.4%	11,292 18.2%	11,232 18.1%	8,748 14.1%	6,245 10.1%	4,690 7.6%	11,404 18.4%
	2010	6,911 11.3%	8,997 14.7%	9,814 16.0%	8,229 13.4%	6,780 11.1%	4,948 8.1%	15,554 25.4%
	2015	6,571 11.0%	8,516 14.2%	9,380 15.6%	8,012 13.4%	6,645 11.1%	4,906 8.2%	15,975 26.6%
Region 11 South Texas Border	2000	14,401 23.0%	14,624 23.4%	10,172 16.3%	7,319 11.7%	4,734 7.6%	3,635 5.8%	7,644 12.2%
	2010	12,991 18.6%	13,538 19.3%	11,026 15.8%	8,385 12.0%	6,346 9.1%	4,447 6.4%	13,267 19.0%
	2015	12,946 17.9%	13,507 18.7%	11,313 15.7%	8,604 11.9%	6,619 9.2%	4,653 6.4%	14,501 20.1%
Region 12 West Texas	2000	4,173 15.5%	5,057 18.7%	4,606 17.1%	3,751 13.9%	2,880 10.7%	1,800 6.7%	4,726 17.5%
	2010	3,418 12.5%	3,904 14.3%	4,171 15.3%	3,531 13.0%	3,018 11.1%	2,304 8.5%	6,907 25.3%
	2015	3,270 12.1%	3,726 13.8%	4,016 14.8%	3,473 12.8%	2,991 11.1%	2,301 8.5%	7,280 26.9%
Balance of State Region	2000	22,804 16.4%	26,300 19.0%	22,476 16.2%	18,162 13.1%	13,653 9.8%	10,522 7.6%	24,808 17.9%
	2010	19,407 13.7%	22,308 15.7%	20,435 14.4%	18,150 12.8%	14,181 10.0%	11,478 8.1%	36,062 25.4%
	2015	18,785 13.2%	21,584 15.2%	20,071 14.1%	17,853 12.6%	14,345 10.1%	11,420 8.1%	37,800 26.6%
Sum of Regions	2000	49,679 17.1%	57,272 19.7%	48,485 16.7%	37,981 13.1%	27,511 9.5%	20,647 7.1%	48,581 16.7%
	2010	42,727 14.2%	48,747 16.2%	45,447 15.1%	38,295 12.7%	30,325 10.1%	23,176 7.7%	71,791 23.9%
	2015	41,573 13.8%	47,333 15.7%	44,780 14.9%	37,943 12.6%	30,599 10.2%	23,281 7.7%	75,556 25.1%
State of Texas	2000	766,921 10.4%	977,043 13.2%	1,019,750 13.8%	938,180 12.7%	773,525 10.5%	636,862 8.6%	2,281,073 30.9%
	2010	777,984 8.7%	958,678 10.7%	1,036,681 11.6%	1,022,435 11.5%	906,500 10.2%	755,169 8.5%	3,465,486 38.8%
	2015	815,417 8.4%	1,001,101 10.3%	1,089,326 11.3%	1,082,945 11.2%	972,338 10.1%	814,916 8.4%	3,897,236 40.3%

Source: 2000 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

Low-income households (generally those below $30,000) are projected to decline between 2010 and 2015, although only minimally, in all regions but Region 11. Within Region 11, low-income households are projected to remain stable.

Median, Mean and HUD 4-person Median Income level on a household level for 2000, 2010 and projected to 2015 for each region is summarized on the following table.

		Households Income		
		Median Income	Mean Income	HUD 4-Peson Median Income
Region 1 High Plains	2000 (Census)	$33,563	$43,702	$33,694
	2010 (Census)	$41,250	$49,564	$43,088
	2015 (Projected)	$47,068	$55,305	$49,516
Region 11 South Texas Border	2000 (Census)	$24,602	$33,748	$26,243
	2010 (Census)	$30,472	$38,019	$31,657
	2015 (Projected)	$33,998	$42,389	$34,450
Region 12 West Texas	2000 (Census)	$34,888	$47,376	$31,567
	2010 (Census)	$42,072	$52,293	$44,150
	2015 (Projected)	$48,500	$57,437	$54,775
Balance of State Region	2000 (Census)	$33,269	$42,487	$32,125
	2010 (Census)	$41,267	$48,596	$41,630
	2015 (Projected)	$47,642	$54,275	$49,295
Sum of Regions	2000 (Census)	$31,580	$41,828	$30,907
	2010 (Census)	$38,765	$47,118	$40,131
	2015 (Projected)	$44,302	$52,351	$47,009
State of Texas	2000 (Census)	$60,903	$45,858	N/A
	2010 (Census)	$59,323	$74,825	N/A
	2015 (Projected)	$66,417	$85,091	N/A

Source: 2000 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

The median household income for all regions but Region 11, are generally between $41,000 and $43,000 in 2010. The 2010 median household income in Region 11 is substantially lower than the other study regions at $30,472.

The population by poverty status is distributed as follows:

		Income in 1999 below poverty level:			Income in 1999 at or above poverty level:			
		<18	18 to 64	65+	<18	18 to 64	65+	Total
Region 1 High Plains	Number	12,109	15,092	3,119	37,452	75,283	19,518	162,573
	Percent	7.4%	9.3%	1.9%	23.0%	46.3%	12.0%	100.0%
Region 11 South Texas Border	Number	32,468	33,630	8,317	43,289	87,887	18,589	224,180
	Percent	14.5%	15.0%	3.7%	19.3%	39.2%	8.3%	100.0%
Region 12 West Texas	Number	5,516	6,866	1,382	14,614	31,632	9,032	69,042
	Percent	8.0%	9.9%	2.0%	21.2%	45.8%	13.1%	100.0%
Balance of State Region	Number	27,568	38,466	8,685	71,140	170,005	44,921	360,785
	Percent	7.6%	10.7%	2.4%	19.7%	47.1%	12.5%	100.0%
Sum of Regions	Number	77,661	94,054	21,503	166,495	364,807	92,060	816,580
	Percent	9.5%	11.5%	2.6%	20.4%	44.7%	11.3%	100.0%
State of Texas	Number	1,549,110	2,063,809	279,613	4,992,273	12,306,555	2,016,796	23,208,156
	Percent	6.7%	8.9%	1.2%	21.5%	53.0%	8.7%	100.0%

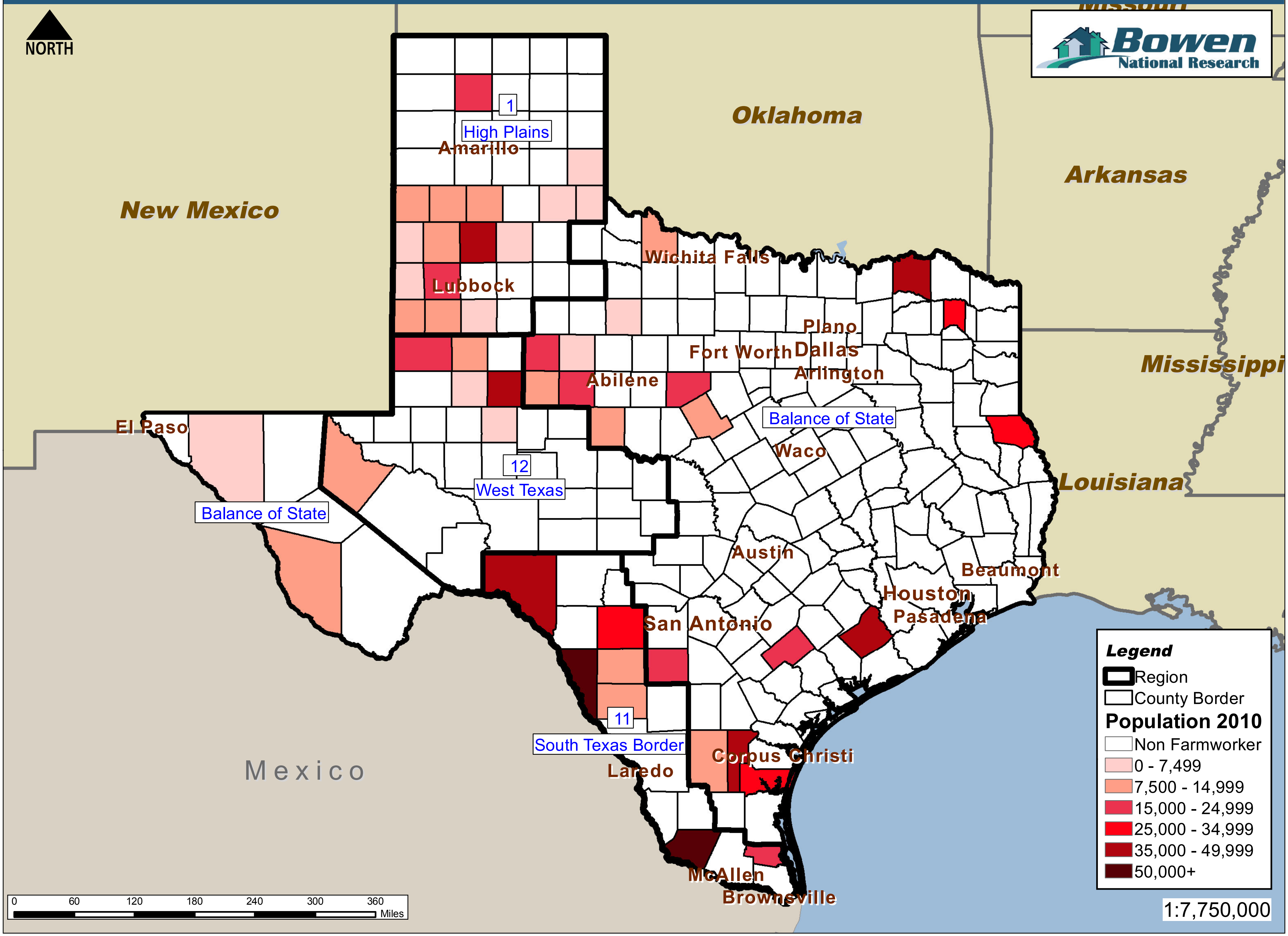
Source: 2000 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

The share of the population with incomes at or below the poverty level is the highest within Region 11, with a 33.2% share living in poverty. All of the other study regions had a share of the population living in poverty of 20.7% or below.

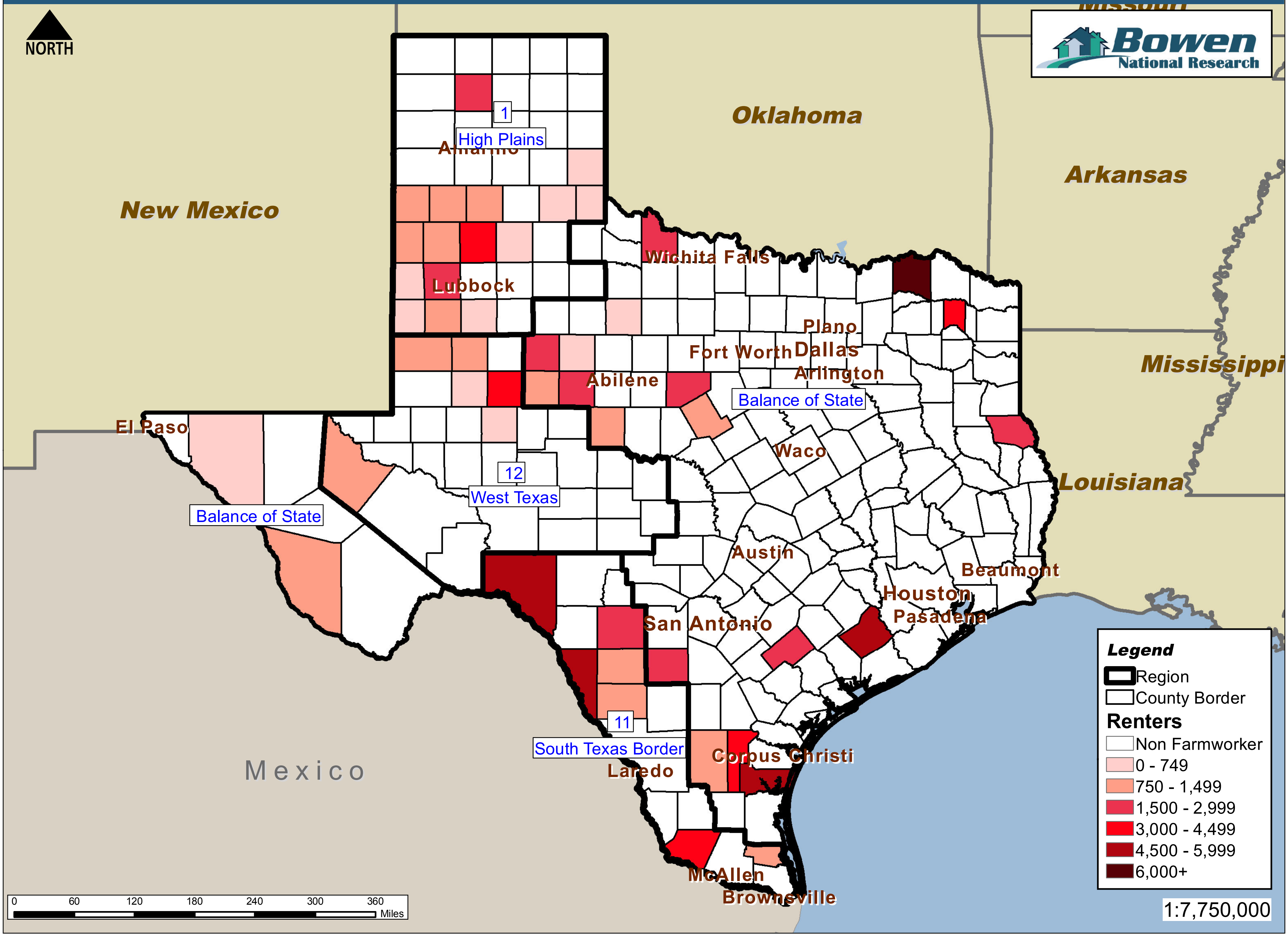
4. THEMATIC MAPS

Various demographic thematic maps of the four regions follow this page.

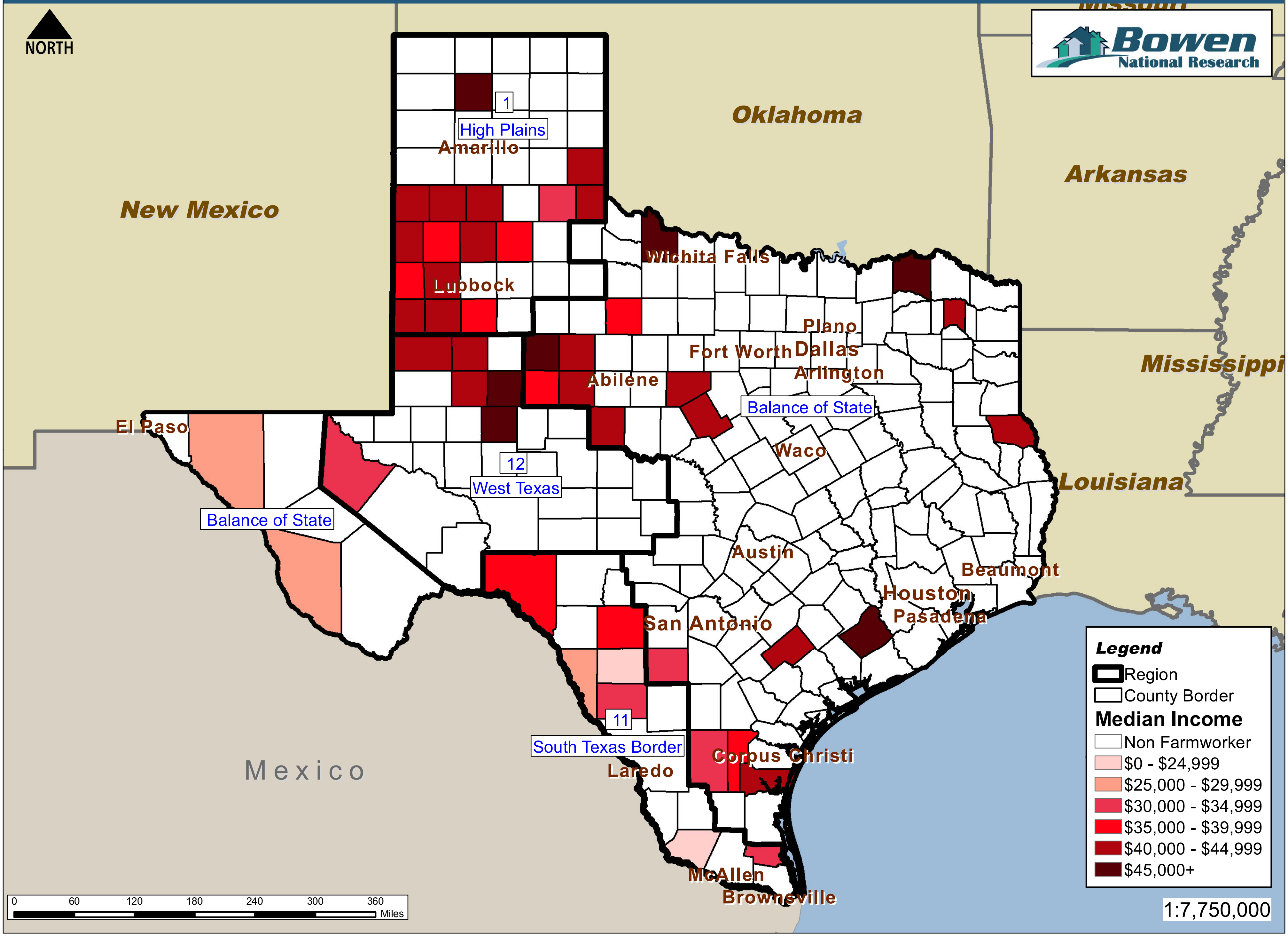
Farmworker Counties: Total Population (2010)



Farmworker Counties: Renter Households (2010)



Farmworker Counties: Median Household Income (2010)



B. FARMWORKER DEMOGRAPHIC SOURCES & METHODOLOGIES

Due to the unique nature of the farmworker industry, with varying seasonal employment changes and a very mobile migrant workforce, for example, it is difficult to accurately quantify various demographic data points for farmworkers. Further, while there are a variety of published data sources pertaining to farmworkers, due to the various points in time the data was collected, the scope of the data collection process, the definitions and parameters used by the data providers, there are varying estimates regarding farmworkers. For the purposes of presenting demographic estimates for the farmworker industry, we have used data from three nationally recognized data sources that tabulated various demographic characteristics of the farm labor industry. In cases where the data providers present the same category of data but such data varies, we have provided multiple data sets.

The demographics presented in this report pertaining to farmworkers is based on analyses of data provided by the 2007 Census of Agriculture, the 2001-2002 National Agriculture Workers Survey (NAWS) conducted by the U.S. Bureau of Labor Statistics and the Migrant and Seasonal Farmworker Enumeration Profile Study of Texas (September 2000). These data sources are summarized below.

Census of Agriculture

The *Census of Agriculture* is required by law under the "Census of Agriculture Act of 1997," Public Law 105-113 (Title 7, United States Code, Section 2204g). The law directs the Secretary of Agriculture to conduct a census of agriculture starting in 1998 and in every fifth year after, covering the prior year. The last Census of Agriculture was conducted in 2008 for the year 2007. The next schedule Census of Agriculture will be conducted in 2013 for the year 2012. The Census includes such things as harvested cropland, number of farms, types of crops harvested and other agricultural-related data on a state and county level.

National Agricultural Workers Survey (NAWS)

The National Agricultural Workers Survey (NAWS) is an employment-based, random survey of the demographic, employment, and health characteristics of the U.S. crop labor force. The information is obtained directly from farmworkers through face-to-face interviews. Since 1988, when the survey began, over 53,000 workers have been interviewed.

The NAWS is performed under contract to the Department of Labor and its information is made available to the public through periodic research reports and a public use data set. Numerous Federal government agencies utilize NAWS findings for a multitude of purposes, including occupational injury and health surveillance, estimating the number and characteristics of farmworkers and their dependents, and program design and evaluation.

Interviews are conducted in three cycles each year to reflect the seasonality of agricultural production and employment. Workers are located at their farm job sites. During the initial contact, arrangements are made to interview the respondent at work during a break period, so as not to interrupt the establishment's business practices, or at home or another location convenient to the respondent. Depending on the information needs and resources of the various Federal agencies that use NAWS data, between 1,500 and 4,000 workers are interviewed each year. Except for California, NAWS data is not available on the state level, but is available on a regional level. As such, this report was only used in our estimates of specific characteristics of farmworkers and their households.

Texas Migrant Seasonal Farmworker Enumeration Profile

The National Center for Farmworker Health worked with Larson Assistance Services to research and estimate various farmworker data sets for several states including Texas. The state-based data was provided on a county level for each county within the state and included the following data sets:

- Migrant farmworkers and seasonal farmworkers
- Non-farmworkers (aka “accompanied” persons) in the same households
- Number of people under the age of 20, by age groups

This profile was developed through the use of questionnaires, telephone interviews, Internet searches and use of multiple secondary data sources such as the National Farmworker Database and the National Agricultural Work Survey and Migrant Health Program statistics, as well as employment reports, and estimates of farmland acreage, nursery/greenhouse space, total food processing workers, and statewide tree planters. The study used a methodology based on actual crop harvest totals and “demand for labor” formulas that calculated the total number of man-hours needed to harvest the crops, which were then used to calculate the estimated number of farmworkers. The resulting data provides estimates for the number of migrant and seasonal farmworkers by county and non-farmworkers that live-with or accompany the farmworkers.

1. National Characteristics

According to the Farm Labor Survey (FLS) of the National Agricultural Statistics Service (NASS), the annual average number of people employed as hired farmworkers, including agricultural service workers (agricultural service workers, are farmworkers brought to farms by specialized contractors rather than hired by farm operators), decreased from 1,142,000 in 1990 to 1,053,000 in 2010. Of the 1,053,000 estimated farmworkers in 2010, 583,00 were full-year hired workers (“full-year farmworkers are those who anticipated working 150 days or more), 184,000 were part-year hired workers (those who anticipated working fewer that 150 days), and the remaining 286,000 were agricultural service workers. Employment is highly seasonal: in January of 2010, there were 802,000 workers, while in July the figure stood at 1,245,000.

While a variety of data sources exist that attempt to quantify farmworker and farmworker household information, the timing of the research and the type of data collected varies, as is evidenced by the differences in employment figures based on seasonality from above.

That being said, data reported for 2010 from the National Agricultural Workers Survey (NAWS) also supports the above reporting 754,680 total hired farmworkers, which included farm laborers, supervisors and farm managers.

The following are key findings regarding farmworker characteristics as reported by NAWS.

Biographical (i.e. Nationality, gender, age, family status, and education):

- Nearly 80% are foreign born;
- Mexican-born workers comprise three-fourths of all workers;
- Four-fifths of all farmworkers are male, while the remaining fifth are female;
- Half of all workers are age 30 or younger (the average age is 33);
- More than one-half (58%) of farmworkers were married;
- Just over half (51%) of workers had children, of which two-thirds were unaccompanied by their children when migrating for work;
- Four-fifths (81%) of farmworkers indicated that they spoke Spanish, while 18 stated they spoke English;

- Only 13% completed high school; The median education attainment was sixth grade;

Work Profile (i.e. migrant versus seasonal, mobility patterns, average work weeks, employer, type of crops worked, pay structure, and incomes):

- Two-fifths (42%) of surveyed farmworkers were considered migrants (travel 75 or more miles to obtain farm work);

- Over one-third (35%) of migrants traveled back-and-forth from a foreign country;

- Over one-quarter (26%) of migrants traveled within the United States only;

- The average work weeks worked within a year ranged from 31 weeks for U.S. born farmworkers to 40 weeks for Central American-born farmworkers.

- Nearly four-fifths (79%) of farmworkers were employed by growers or packing firms; Less than a fourth (21%) of workers were employed by labor contractors.

- Most (34%) of farmworkers worked in fruit and nut crop-related areas, while slightly less (31%) worked with vegetable crops.

- Nearly four-fifths (79%) of farmworkers indicated that they were paid by the hour, 16% were paid by the piece and the balance were paid by either a combination of hourly and piece or simply paid a salary.

- Farmworkers work an average of 42 hours per week.

- More than half (60%) of farmworkers indicated that they work seasonally, while one-fourth indicated they work year-round.

- Individual farmworkers had an average annual income fall between $10,000 and $12,499, while the total family income averaged between $15,000 and $17,999. Almost a third (30%) of farmworkers had total family household incomes below the U.S. government's poverty limits.

2. Texas Characteristics

There are two primary sources that provide estimates of farmworkers in the state of Texas on a county level. These include the Texas Migrant Seasonal Farmworker Enumeration Profile (2000) and the 2007 Census of Agriculture.

According to the Texas Migrant Seasonal Farmworker Enumeration Profile (2000), it was estimated that there were 132,034 migrant farmworkers in Texas and 78,078 non farmworkers in migrant households. These are statewide estimates and are not limited to the 49 counties in the four regions evaluated in this Bowen National Research report. When the Enumeration Profile study is limited to the 49 subject counties, there were an estimated 84,861 farmworkers in the study areas.

The 2007 Census of Agriculture estimated that there were 154,793 hired farmworkers in the state of Texas. When this estimate is limited to the 49 study counties of the Bowen National Research report, there are an estimated 32,403 farmworkers.

Because the three primary farmworker data sources cited in this report vary in time (2000, 2001 – 2002, and 2007) and differ in methodologies and definitions, we have provided more current farmworker data estimates using an approach that was developed by the Shimberg Center for Housing Studies at the University of Florida for a report entitled *The Need for Farmworker Housing in Florida*, dated July 16, 2010.

Using the Shimberg Center for Housing Studys' methodology, we have estimated the total number of farmworkers in each county and region studied in Texas by using two primary data sources: The Bureau of Labor Statistics' Quarterly Census of Employment and Wages (QCEW) and the Department of Labor's National Agricultural Workers Survey (NAWS). These two data sources are summarized below:

- Quarterly Census of Employment and Wages - This data source is compiled by the Bureau of Labor Statistics and includes employment and wage information for workers covered by state unemployment insurance laws. Such data is available on the state and county levels and is organized by North American Industry Classification industrial codes. For the purposes of this analysis, we have used the following NAIC codes: 111 (*Crop Production)*, 1125 (*Aquaculture)*, and 1151 (*Support for Crop Production).* The primary data used for these categories includes total annual wages and average weekly wage for each NAIC job category.

- National Agricultural Workers Survey - The National Agricultural Workers Survey (NAWS) is an employment-based, random survey of the U.S. crop labor force. Started in 1988, this survey is conducted three times a year. The information collected includes composition and demographic characteristics of the household, demographic characteristics of the farmworker respondent, employment and migration profiles, earnings, benefits, worksite characteristics, health issues and safety issues, housing, legal status and other pertinent statistics. For the purposes of this study and our farmworker estimates, we have NAWS data as it relates to average weeks worked annually, which is 34.4 weeks naturally.

The methodology used to estimate the number of farmworkers per county and region is detailed as follows:

Step 1: **Calculate the number of weeks worked annually within the Crop Production, Aquaculture, and Support for Crop Production employment categories:** Dividing the county's annual wages by the average weekly wage yields the number of reported weeks worked within the specified industry categories. Annual wages and average weekly wage data is reported quarterly to the department of labor as part of the unemployment insurance reporting requirements of employers. This information can be accessed by visiting the Department of Labor's website at http://www.bls.gov/cew/

Step 2: **Calculate the number of workers in each study area required to work the number of weeks annually as was determined in Step 1:** Using NAWS data, it is estimated that the average farmworker works approximately 34.4 weeks a year in farm labor related work. Dividing the number of weeks worked annually (from step 1) by the average number (34.4) of weeks worked yields the number of workers required within the specified industry categories.

Step 3: **Total the estimated job workers within the three industry categories studied by study area.** Each of the three industry categories is added together, yielding the total number of farmworkers per study area.

We deviated from the Shimberg Center's study in that we have not attempted to account for farmworkers that fell in the "County Unknown" category or those counties that, due to confidentiality reasons, had no published data required to estimate farmworkers. Since our study is of regional farmworker demand and not on a county level, and because virtually every county in the study areas had published labor data, we believe it to be unnecessary to allocate "County Unknown" data within the respective regions. This report also deviates from the Shimberg Center's study in that we attempt to estimate the number of unreported/ undocumented farmworkers, the number of accompanied/unaccompanied farmworkers, and farmworkers by annual income.

Migrant and Seasonal Farmworkers

While NAWS national data indicated that approximately 42% of farmworkers are classified as "migrant" and the remaining 58% is considered "settled" or "seasonal" workers. The Texas Migrant Seasonal Farmworker Enumeration Profile (2000) indicated that statewide in Texas the share of migrant farmworkers is 45.7%, while the seasonal farmworker share 54.3%. When considering only the 49 Texas counties studied in this report, the share of migrant and seasonal farmworkers is distributed as follows:

Farmworker Type	
Category	**Share***
Migrant	59.0%
Seasonal	41.0%
Total	100.0%

Source: Texas Migrant Seasonal Farmworker Enumeration Profile (2000)

The higher share of migrant farmworkers and corresponding lower share of seasonal workers in the study areas as compared with the state average is not surprising given the fact that the study areas are rural and likely have migrant farmworkers traveling into these rural areas to seek temporary work. The county shares of migrant and seasonal farmworkers have been applied to our overall estimates of farmworkers in 2010.

Incomes

According to the NAWS 2005-2009 data, the distribution of annual personal income levels for farmworkers was as follows (Note: The numbers presented are national shares):

Annual Farmworker Income	
Annual Income	**Share***
Up to $9,999	22%
$10,000-$19,999	47%
$20,000-$29,999	21%
$30,000 and Higher	10%
Total	100.0%

Source: NAWS 2005-2009
*Percentages are from the total number of farmworkers with reported income data. Farmworkers who had not worked in the US for a full year were excluded as part of the NAWS survey.

While farmworker incomes in Texas may vary from the national estimates and between regions within Texas, these shares represent a good baseline from which to draw reasonable Texas farmworker estimates. These shares have been applied to the estimated farmworkers for each county and region studied in this report.

Accompanied & Unaccompanied Farmworkers

Accompanied farmworkers are those living with spouse, children, or parents, or minor farmworkers living with a sibling. Unaccompanied farmworkers are those who do not live with immediate family.

The Texas Migrant Seasonal Farmworker Enumeration Profile (2000) provided estimates of accompanied and unaccompanied farmworkers for each Texas county. When considering only the 49 Texas counties studied in this report, the share of accompanied and unaccompanied farmworkers is distributed as follows:

Accompanied/Unaccompanied Farmworkers	
Category	**Share***
Accompanied	50.5%
Unaccompanied	68.0%
Total	100.0%

Source: Texas Migrant Seasonal Farmworker Enumeration Profile (2000)

These shares have been applied to our estimates of farmworkers by county and region in 2010.

Unreported Farmworkers

Due to characteristics and geographical location that are unique to the farmworker industry in Texas, which includes short-term employment and the study areas' proximity to Mexico, it is commonplace to have a large number of unreported workers at many of the Texas farms. Because reliable estimates for unreported farmworkers is only on a national and state level and not on a county level, we have applied the estimated shares of unreported farmworkers (using data from the National Agricultural Workers Survey, the 2007 Census of Agriculture, and the Texas Migrant and Seasonal Farmworker Enumeration Profile - 2000) to our estimates of reported workers by study county and region, yielding overall farmworkers (both reported and unreported) estimates for each study area.

Migration Patterns

Quantative information relative to migrant and seasonal farmworkers specifically within Texas and the rural study counties is not available. However, according to the Housing Assistance Council, "Texas rural communities have experienced significant out-migration within the existing population, as many residents have moved into the larger cities to make more money, while the new Hispanic population moves into the abandoned rural areas. The new Hispanic population is finding work in service and construction positions". (USDA Section 514/516 Farmworker Housing: Existing Stock and Changing Needs). Based on Bowen National Research's Texas stakeholder interviews and secondary data, with expanded growing seasons and a reduction in the number of migrant farmworkers, farmworkers are generally more likely to reside in the same area longer or even year-round. Some sources stated that the difficulty of being able to afford two residences (home base location and temporary housing in migrated locations) simultaneously have decreased the amount of migration that occurs among farmworkers. Texas stakeholder interviews indicated that many farmworkers will stay in an area year-round because they can secure other non-farm work, assuming they can secure decent, affordable housing.

C. REGIONAL FARMWORKER COMPARISONS

Based on the methodology outlined in the previous pages, Bowen National Research was able to project various farmworker demographic characteristics for each study region, as well as for each selected rural county in the corresponding regions. These estimates are limited to 2010 and include the distribution of farmworker incomes, reported and unreported farmworkers, seasonal and migrant farmworkers, and accompanied and unaccompanied farmworkers.

The following table compares the total farmworker estimates from the 2000 Enumeration Profile and the 2007 Census of Agriculture with Bowen National Research estimates for the four regions included in our analysis:

	Estimated Farmworkers					
	2000 Enumeration Profile		2007 Census of Agriculture		2010 Bowen National Research	
	Number	Percent	Number	Percent	Number	Percent
Region 1 High Plains	30,263	35.7%	12,985	40.1%	11,074	32.1%
Region 11 South Texas Border	19,190	22.6%	3,471	10.7%	4,861	14.1%
Region 12 West Texas	14,195	16.7%	3,065	9.5%	4,841	14.0%
Balance of State Region	21,213	25.0%	12,882	39.7%	13,744	39.8%
Total	84,861	100.0%	32,403	100.0%	34,520	100.0%

Note: data is limited to only the counties that met the farmworker county designation

The Migrant and Seasonal Farmworkers Enumeration Profile Study of Texas estimated that there were 84,861 farmworkers within the selected counties within the four study regions. This study is over a decade old and it is likely that significant changes have occurred over the past 10 years. Additionally, the methodology used in the Enumeration Profile study is different than that incorporated by Bowen National Research. As such, while there likely has been a decline in the number of farmworkers in the rural study regions over the past decade, the differences between the Enumeration Profile study and the Census of Agriculture and Bowen National Research's estimates should not be construed as an indication that the number of farmworkers has declined by more than 50%. Since the timing of the reports differs, as well as the methodology between the different reports, the farmworker estimates should not be used to draw conclusions as to farmworker population trends. Instead, the presentation of various farmworker data sets is intended to demonstrate that there are various approaches that have been used in the past to estimate the number of farmworkers and to allow the reader to compare such estimates.

Bowen National Research estimated that there were 34,520 farmworkers within the 49 counties within the four study regions. Bowen National estimates of farmworkers within the study areas are very comparable to the Census of Agriculture, and take into account the most current payroll data reported to the Department of Labor. This total includes estimates of both reported and unreported farmworkers, which are discussed in greater detail later in this section. The Balance of State Region, which includes 20 counties, has the largest number of estimated farmworkers in the study area at 13,744, or 39.8% of the total estimated farmworkers for the four study areas. Region 1 has the second largest estimated number of farmworkers, with 11,074. Regions 11 and 12 have a notably lower estimated number of farmworkers at 4,861 and 4,841, respectively.

Due to the nature of the agriculture job sector and the labor needs for the industry, as well as Texas' proximity to Mexico, there are a notable number of unreported (and possibly illegal immigrant) farmworkers in Texas. As discussed earlier in this section, Bowen National Research used data from the National Agricultural Workers Survey, the 2007 Census of Agriculture, and the Texas Migrant and Seasonal Farmworker Enumeration Profile to estimate the number of reported and unreported farmworkers within each study area. The following summarizes Bowen National Research's estimated number of reported and unreported farmworkers for each study region for 2010.

	Estimated Reported & Unreported Farmworkers (2010)					
	Reported		Unreported		Total	
	Number	Percent	Number	Percent	Number	Percent
Region 1 High Plains	7,054	38.5%	4,020	24.8%	11,074	32.1%
Region 11 South Texas Border	2,445	13.4%	2,416	14.9%	4,860	14.1%
Region 12 West Texas	3,316	18.1%	1,525	9.4%	4,842	14.0%
Region Balance	5,484	30.0%	8,260	50.9%	13,744	39.8%
Total	18,299	100.0%	16,221	100.0%	34,520	100.0%

Source: Bowen National Research; National Agricultural Worker Survey
Note: data is limited to only the counties that met the farmworker county designation

Slightly more than one-half (53.0%) of all estimated farmworkers in the study areas are reported farmworkers, while the balance of farmworkers are considered unreported workers. It is of significance that Regions 1 and 12 have much larger shares of reported workers, 63.7% and 68.5% respectively, than Region 11, which has one-half of the estimated farmworkers as reported. The fact that Region 11 has half of the farmworkers as unreported is not surprising given this region, also known as South Texas Border service region, is located along the Texas-Mexico border and likely has more illegal immigrants than most other regions, which would lead to more unreported workers.

Using information from the National Agricultural Workers Survey (2005 to 2009), Bowen National Research's 2010 estimated for the number of migrant and seasonal farmworkers by study region. These estimates are included in the following table:

	Estimated Migrant & Seasonal Farmworkers (2010)					
	Migrant		Seasonal		Total	
	Number	Percent	Number	Percent	Number	Percent
Region 1 High Plains	5,951 (53.7%)	29.8%	5,123 (46.3%)	35.3%	11,074	32.1%
Region 11 South Texas Border	3,577 (73.6%)	17.9%	1,283 (26.4%)	8.8%	4,860	14.1%
Region 12 West Texas	2,242 (46.3%)	11.2%	2,600 (53.7%)	17.9%	4,842	14.0%
Balance of State Regions	8,221 (59.8%)	41.1%	5,521 (40.2%)	38.0%	13,744	39.8%
Total	19,991	100.0%	14,527	100.0%	34,520	100.0%

Source: Bowen National Research; NAWS (2005 to 2009)
Note: data is limited to only the counties that met the farmworker county designation

The share of migrant farmworkers is highest in Region 11, representing nearly three-fourths (73.6%) of all farmworkers in this region. This correlates to the fact that this region also has a greater share of unreported workers than most regions. Only Region 12 has a higher share (53.7%) of Seasonal Farmworkers than Migrant Farmworkers (46.3%). Among the four regions, the Balance of State Region has the largest number of Migrant Farmworkers, with over 8,221 such workers.

Bowen National Research estimated the distribution of farmworkers by income for each of the study regions for 2010. It is important to note that the data is provided on the individual farmworker level and does not take into consideration any additional income from non-farm work or government assistance that farmworkers may receive or other income from non-farmworkers living with farmworkers who may be contributing to the family household income. As such, these income estimates should be considered conservative.

	Farmworker Households by Annual Income (2010)				
	Less than $10,000	$10,000 - $19,999	$20,000 - $29,999	$30,000 & Higher	Total
Region 1 High Plains	2,436	5,205	2,326	1,107	11,074
Region 11 South Texas Border	1,069	2,284	1,021	486	4.860
Region 12 West Border	1,065	2,276	1,017	484	4,842
Region Balance	3,024	6,459	2,886	1,375	13,744
Total	7,594	16,224	7,250	3,452	34,520

Source: Bowen National Research; NAWS (2005 to 2009)
Note: data is limited to only the counties that met the farmworker county designation

While it is possible that low-income households, depending upon household size, with incomes above $30,000 could qualify for government-subsidized housing designated for farmworkers, for the purposes of this analysis we have assumed that any farmworker with an annual income of $30,000 or higher would likely reside in Tax Credit or other non-subsidized housing in their area. Conversely, we assume farmworkers with annual incomes below $30,000 would reside in government-subsidized housing designated specifically for farmworkers, such as Rural Development 514 and 516 and migrant labor housing facilities.

The 2010 estimated distribution of individual farmworkers with annual incomes below $30,000 by region is summarized in the following table:

	Farmworkers Making Less than $30,000 Annually
Region 1 High Plains	9,967
Region 11 South Texas Border	4,374
Region 12 West Texas	4,358
Region Balance	12,369
Total	31,068

Source: Bowen National Research; NAWS (2005 to 2009)
Note: data is limited to only the counties that met the farmworker county designation

The estimated farmworkers in the preceding table were used in our demand estimates in Section VII of this report.

The Migrant and Seasonal Farmworker Enumeration Profile of Texas (2000) provided the estimated share of accompanied farmworkers, both migrant and seasonal. These shares were used to estimate the number of accompanied and unaccompanied migrant and seasonal farmworkers for 2010. The following table summarizes the distribution of migrant and seasonal farmworkers by whether or not they are accompanied or unaccompanied for each of the four study regions.

	Accompanied & Unaccompanied Farmworkers (2010)				
	Migrant Farmworker s		Seasonal Farmworkers		
	Accompanied	Unaccompanied	Accompanied	Unaccompanied	Total
Region 1 High Plains	3,204	3,266	1,469	3,136	11,074
Region 11 South Texas Border	1,406	1,433	645	1,376	4,860
Region 12 West Texas	1,401	1,428	642	1,371	4,842
Region Balance	3,976	4,053	1,823	3,891	13,744
Total	9,987	10,180	4,579	9,774	34,520

Source: 2000 MSFW Enumeration Profiles
Note: data is limited to only the counties that met the farmworker county designation

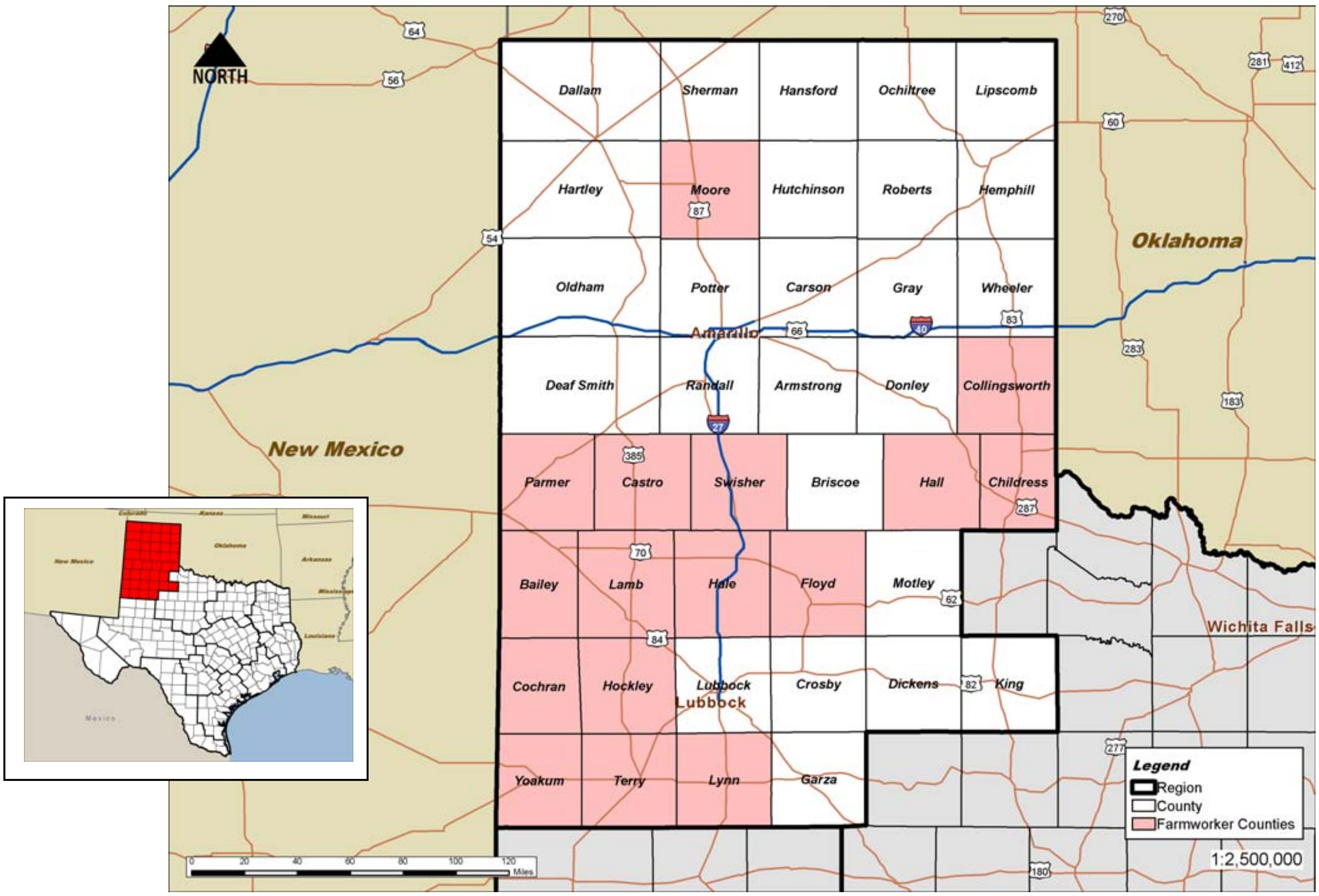
The share of accompanied and unaccompanied migrant farmworkers is split relatively even. Meanwhile, unaccompanied seasonal farmworkers are more than double the number of accompanied seasonal farmworkers. Accompanied farmworkers are in greater need of housing that can accommodate families, such as apartments, mobile homes and houses. Unaccompanied farmworkers are more likely to be open to housing alternatives such as dormitory housing or shared housing arrangements.

D. COUNTY COMPARISON BY REGION

We estimated and evaluated demographic characteristics for farmworkers in each county within each study region.

Region 1 (High Plains)

Region 1 is located in the northwestern portion of the state of Texas. This region includes at total of 41 counties, of which 16 were evaluated for rural farmworker demographics.



Bowen National Research

The following table compares the estimated number of farmworkers for each of the selected farmworkers counties within the region.

	Estimated Farmworkers					
	2000 Enumeration Profile		2007 Census of Agriculture		2010 Bowen National Research	
	Number	Percent	Number	Percent	Number	Percent
Bailey	1,306	4.3%	657	5.1%	290	2.6%
Castro	1,229	4.1%	1,100	8.5%	393	3.5%
Childress	540	1.8%	211	1.6%	123	1.1%
Cochran	1,502	5.0%	414	3.2%	395	3.6%
Collingsworth	949	3.1%	266	2.0%	181	1.6%
Floyd	2,135	7.1%	1,782	13.7%	936	8.5%
Hale	3,641	12.0%	1,258	9.7%	1,767	16.0%
Hall	1,069	3.5%	206	1.6%	255	2.3%
Hockley	2,839	9.4%	640	4.9%	1,032	9.3%
Lamb	2,055	6.8%	1,248	9.6%	1,398	12.6%
Lynn	3,025	10.0%	689	5.3%	761	6.9%
Moore	1,673	5.5%	539	4.2%	419	3.8%
Parmer	1,473	4.9%	1,922	14.8%	648	5.9%
Swisher	850	2.8%	486	3.7%	511	4.6%
Terry	3,620	12.0%	1,009	7.8%	1,155	10.4%
Yoakum	2,357	7.8%	558	4.3%	808	7.3%
Region 1	**30,263**	**100.0%**	**12,985**	**100.0%**	**11,074**	**100.0%**

Source: Bowen National Research

Based on Bowen National Research estimates, the largest number of farmworkers within this region is in Hale County (1,767), Lamb County (1,398), Terry County (1,155) and Hockley County (1,032). There are less than 200 farmworkers in Collingsworth (181) and Childress Counties (123).

The following table compares the estimated number of reported and unreported farmworkers for each of the selected farmworkers counties within the region.

	Estimated Reported & Unreported Farmworkers (2010)					
	Reported		Unreported		Total	
	Number	Percent	Number	Percent	Number	Percent
Bailey	185	2.6%	105	2.6%	290	2.6%
Castro	250	3.5%	143	3.6%	393	3.5%
Childress	78	1.1%	45	1.1%	123	1.1%
Cochran	252	3.6%	144	3.6%	395	3.6%
Collingsworth	115	1.6%	66	1.6%	181	1.6%
Floyd	596	8.4%	340	8.5%	936	8.5%
Hale	1,126	16.0%	641	15.9%	1,767	16.0%
Hall	163	2.3%	93	2.3%	255	2.3%
Hockley	657	9.3%	375	9.3%	1,032	9.3%
Lamb	891	12.6%	507	12.6%	1,398	12.6%
Lynn	485	6.9%	276	6.9%	761	6.9%
Moore	267	3.8%	152	3.8%	419	3.8%
Parmer	413	5.9%	235	5.8%	648	5.9%
Swisher	326	4.6%	186	4.6%	511	4.6%
Terry	736	10.4%	419	10.4%	1,155	10.4%
Yoakum	515	7.3%	293	7.3%	808	7.3%
Region 1	**7,054**	100.0%	**4,020**	100.0%	**11,074**	100.0%

Source: Bowen National Research

Within the region, the 7,054 *reported* farmworkers represent 63.7% of the total farmworkers, while the estimated 4,020 *unreported* farmworkers represent 36.3% of the total farmworkers in the region.

The estimated number of migrant and seasonal farmworkers by county for the region is compared in the following table:

	Estimated Migrant & Seasonal Farmworkers (2010)					
	Migrant		Seasonal		Total	
	Number	Percent	Number	Percent	Number	Percent
Bailey	170	58.4%	121	41.6%	291	2.6%
Castro	251	64.0%	142	36.0%	394	3.5%
Childress	56	45.7%	67	54.3%	123	1.1%
Cochran	182	46.1%	213	53.8%	396	3.6%
Collingsworth	88	48.7%	93	51.3%	182	1.6%
Floyd	517	55.3%	419	44.7%	936	8.5%
Hale	975	55.1%	793	44.9%	1,768	16.0%
Hall	140	55.0%	115	45.0%	256	2.3%
Hockley	549	53.2%	482	46.7%	1,032	9.3%
Lamb	639	45.7%	759	54.3%	1,398	12.6%
Lynn	348	45.7%	414	54.3%	762	6.9%
Moore	419	100.0%	0	0.0%	420	3.8%
Parmer	397	61.3%	251	38.7%	649	5.9%
Swisher	299	58.6%	212	41.4%	512	4.6%
Terry	537	46.5%	618	53.5%	1,155	10.4%
Yoakum	381	47.2%	427	52.8%	809	7.3%
Region 1	**5,951 (53.7%)**	**29.8%**	**5,123 (46.3%)**	**35.3%**	**11,074**	100.0%

Source: Bowen National Research

Over half of the farmworkers in the region are migrant farmworkers. The greatest number (975) of migrant farmworkers is in Hale County. There are no seasonal farmworkers in Moore County and only 67 seasonal farmworkers in Childress County. Hale County (793) and Lamb County (759) have the largest number of seasonal farmworkers.

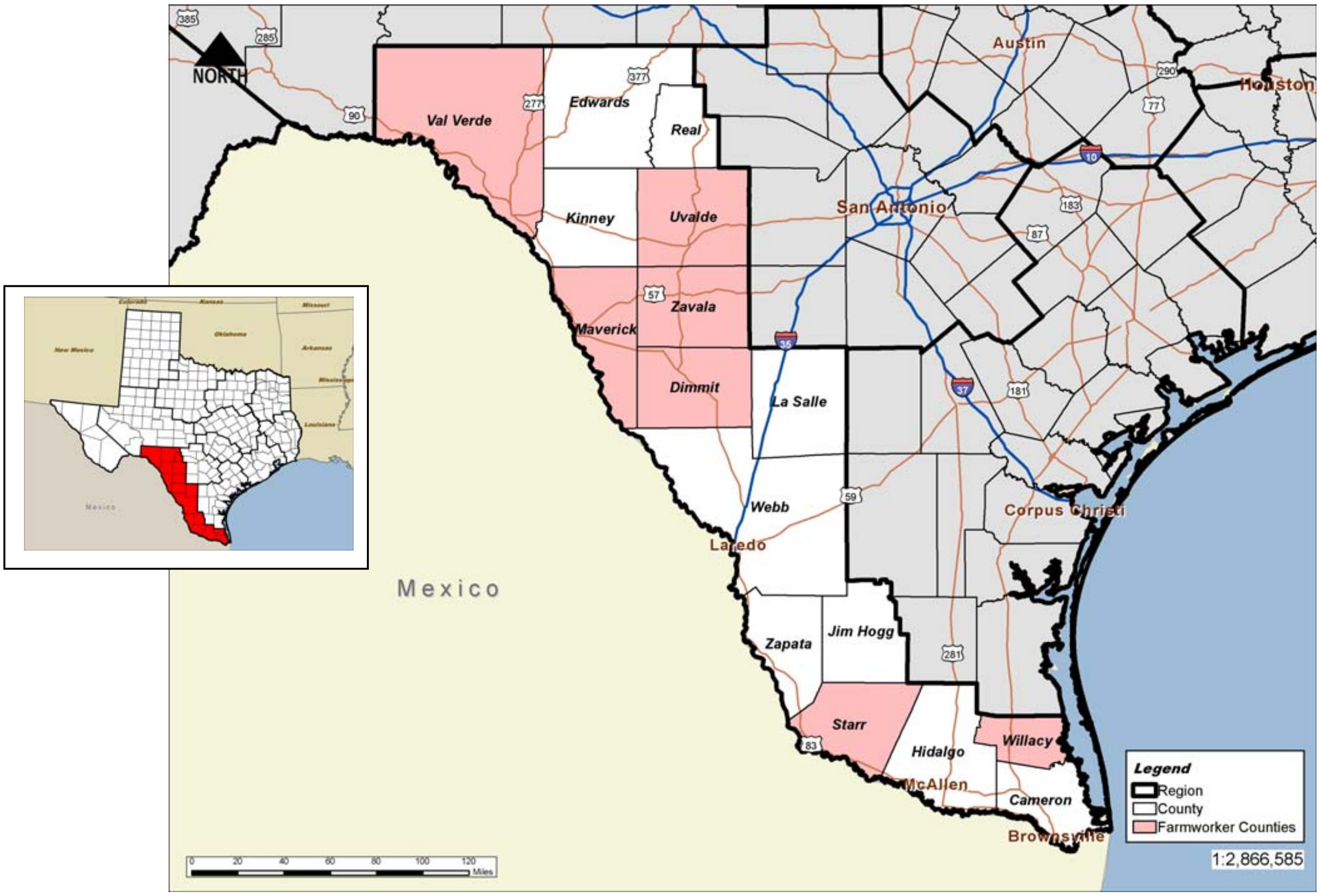
The estimated distribution of households by income for each of the counties within the study region for 2010 is illustrated in the following table:

	Farmworkers (Individuals) by Annual Income (2010)				
	Less than $10,000	$10,000 - $19,999	$20,000 - $29,999	$30,000 & Higher	Total
Bailey	64	136	61	29	290
Castro	86	185	83	39	393
Childress	27	58	26	12	123
Cochran	87	186	83	40	395
Collingsworth	40	85	38	18	181
Floyd	206	440	197	94	936
Hale	389	831	371	177	1,767
Hall	56	120	54	26	255
Hockley	227	485	217	103	1,032
Lamb	308	657	294	140	1,398
Lynn	168	358	160	76	761
Moore	92	197	88	42	419
Parmer	143	305	136	65	648
Swisher	112	240	107	51	511
Terry	254	543	243	115	1,155
Yoakum	178	380	170	81	808
Region 1	**2,436**	**5,205**	**2,326**	**1,107**	**11,074**

Source: Bowen National Research; NAWS (2005 to 2009)

Region 11 (South Texas Border)

Region 11 is located in the far southern portion of the state of Texas. This region includes at total of 16 counties, of which seven were evaluated for rural farmworker demographics. A map illustrating the counties within the region is below:



Bowen National Research

The following table compares the estimated number of farmworkers for each of the selected farmworkers counties within the region.

	Estimated Farmworkers					
	2000 Enumeration Profile		2007 Census of Agriculture		2010 Bowen National Research	
	Number	Percent	Number	Percent	Number	Percent
Dimmit	769	4.0%	418	12.0%	166	3.4%
Maverick	2,859	14.9%	371	10.7%	465	9.6%
Starr	5,045	26.3%	743	21.4%	998	20.5%
Uvalde	3,181	16.6%	653	18.8%	1,591	32.7%
Val Verde	2,221	11.6%	475	13.7%	370	7.6%
Willacy	2,190	11.4%	403	11.6%	997	20.5%
Zavala	2,925	15.2%	408	11.8%	274	5.6%
Region 11	**19,190**	**100.0%**	**3,471**	**100.0%**	**4,860**	**100.0%**

Based on Bowen National Research estimates, Uvalde County has the greatest number of farmworkers in the region, with 1,591 workers or 32.7% of total estimated farmworkers within the region's study counties. Starr and Willacy Counties also have notable shares of farmworkers, with an estimated 998 and 997 workers, respectively. There are only an estimated 166 farmworkers in Dimmit County.

The following table compares the estimated number of reported and unreported farmworkers for each of the selected farmworkers counties within the region.

	Estimated Reported & Unreported Farmworkers (2010)					
	Reported		Unreported		Total	
	Number	Percent	Number	Percent	Number	Percent
Dimmit	83	3.4%	82	3.4%	166	3.4%
Maverick	234	9.6%	231	9.6%	465	9.6%
Starr	502	20.5%	496	20.5%	998	20.5%
Uvalde	800	32.7%	791	32.7%	1591	32.7%
Val Verde	186	7.6%	184	7.6%	370	7.6%
Willacy	502	20.5%	496	20.5%	997	20.5%
Zavala	138	5.6%	136	5.6%	274	5.6%
Region 11	**2,445**	**100.0%**	**2,416**	**100.0%**	**4,860**	**100.0%**

Uvalde County has the largest number (791) of reported farmworkers in the region.

The estimated number of migrant and seasonal farmworkers by county for the region is compared in the following table:

	Estimated Migrant & Seasonal Farmworkers (2010)					
	Migrant		Seasonal		Total	
	Number	Percent	Number	Percent	Number	Percent
Dimmit	131	79.2%	35	20.9%	167	3.4%
Maverick	445	95.6%	20	4.4%	466	9.6%
Starr	884	88.5%	114	11.5%	999	20.5%
Uvalde	940	59.1%	651	40.9%	1,591	32.7%
Val Verde	370	100.0%	0	0.0%	370	7.6%
Willacy	647	64.8%	351	35.2%	998	20.5%
Zavala	161	58.8%	113	41.2%	274	5.6%
Region 11	**3,577 (73.6%)**	**17.9%**	**1,283 (26.4%)**	**8.8%**	**4,860**	100.0%

Nearly three-fourths (73.6%) of all farmworkers are migrant farmworkers. All 370 estimated farmworkers in Val Verde County are migrant farmworkers. Maverick County (95.6%) and Starr County (88.5%) have large shares of migrant farmworkers. Seasonal farmworkers are greatest in Uvalde county (651) and Willacy County (351).

The estimated distribution of households by income for each of the counties within the study region for 2010 is illustrated in the following table:

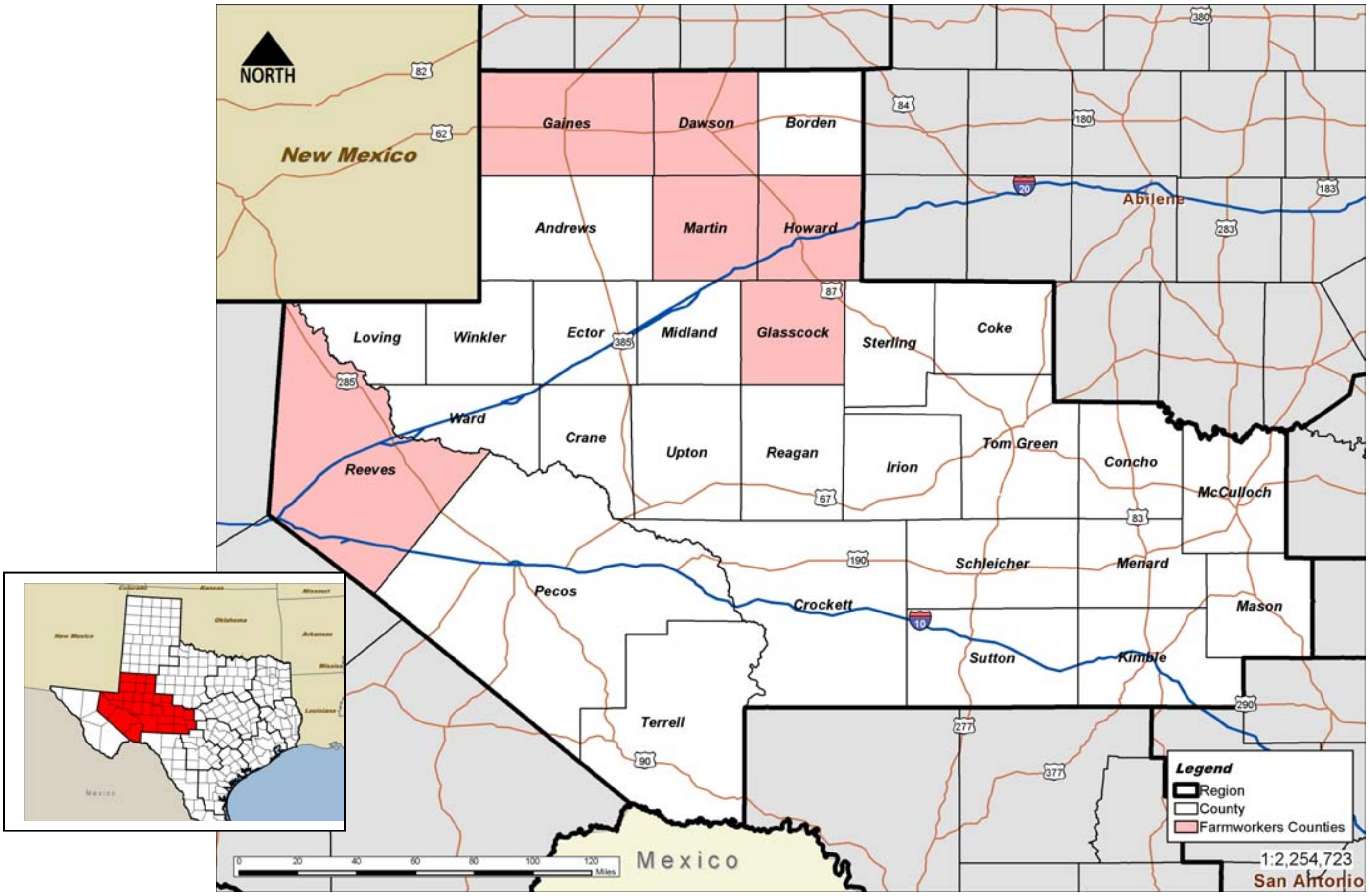
	Farmworkers (Individuals) by Annual Income (2010)				
	Less than $10,000	$10,000 - $19,999	$20,000 - $29,999	$30,000 & Higher	Total
Dimmit	36	78	35	17	166
Maverick	102	219	98	47	465
Starr	220	469	210	100	998
Uvalde	350	748	334	159	1,591
Val Verde	81	174	78	37	370
Willacy	219	469	209	100	997
Zavala	60	129	57	27	274
Region 11	**1,069**	**2,284**	**1,021**	**486**	**4,860**

Source: Bowen National Research; NAWS (2005 to 2009)

The number of farmworkers by income level is used in our demand estimates in Section VI of this report.

Region 12 (West Texas)

Region 12 is located in the western portion of the state of Texas. This region includes at total of 30 counties, of which 6 were classified as rural farmworker counties that were included in the following analysis. A map illustrating the location of the counties included in our analysis is below.



Bowen National Research

The following table compares the estimated number of farmworkers for each of the selected farmworkers counties within the region.

	Estimated Farmworkers					
	2000 Enumeration Profile		2007 Census of Agriculture		2010 Bowen National Research	
	Number	Percent	Number	Percent	Number	Percent
Dawson	3,549	25.0%	818	26.7%	1,503	31.0%
Gaines	6,105	43.0%	1,096	35.8%	2,293	47.4%
Glasscock	942	6.6%	203	6.6%	256	5.3%
Howard	1,125	7.9%	279	9.1%	279	5.8%
Martin	1,632	11.5%	414	13.5%	376	7.8%
Reeves	842	5.9%	255	8.3%	134	2.8%
Region 12	**14,195**	**100.0%**	**3,065**	**100.0%**	**4,842**	**100.0%**

Bowen National Research estimates that there were 4,842 farmworkers within the region in 2010. Gaines and Dawson Counties comprise most of the farmworkers, with 2,293 and 1,503 farmworkers, respectively. These two counties comprise a combined 78.4% of all farmworkers in the region. The four remaining counties individually contain no more than 7.8% of the region's farmworkers.

The following table compares the estimated number of reported and unreported farmworkers for each of the selected farmworkers counties within the region.

	Estimated Reported & Unreported Farmworkers (2010)					
	Reported		Unreported		Total	
	Number	Percent	Number	Percent	Number	Percent
Dawson	1,030	31.1%	473	31.0%	1,503	31.0%
Gaines	1,571	47.4%	722	47.3%	2,293	47.4%
Glasscock	176	5.3%	81	5.3%	256	5.3%
Howard	191	5.8%	88	5.8%	279	5.8%
Martin	258	7.8%	118	7.7%	376	7.8%
Reeves	92	2.8%	42	2.8%	134	2.8%
Region 12	**3,316**	**100.0%**	**1,525**	**100.0%**	**4,842**	**100.0%**

Both Dawson and Gaines Counties have more than 1,000 *reported* farmworkers.

The estimated number of migrant and seasonal farmworkers by county for the region is compared in the following table:

	Estimated Migrant & Seasonal Farmworkers (2010)					
	Migrant		Seasonal		Total	
	Number	Percent	Number	Percent	Number	Percent
Dawson	707	47.0%	796	53.0%	1,503	31.0%
Gaines	1,048	45.7%	1,245	54.3%	2,294	47.4%
Glasscock	117	45.6%	139	54.2%	256	5.3%
Howard	128	45.8%	151	54.2%	279	5.8%
Martin	172	45.7%	204	54.3%	376	7.8%
Reeves	70	52.4%	64	47.6%	135	2.8%
Region 12	**2,242**	**46.3%**	**2,600**	**53.7%**	**4,842**	**100.0%**

With the exception of Reeves County, each county in the region has more Seasonal Farmworkers than Migrant Farmworkers. Gaines County has the largest number of Seasonal Farmworkers, with 1,245.

The estimated distribution of households by income for each of the counties within the study region for 2010 is illustrated in the following table:

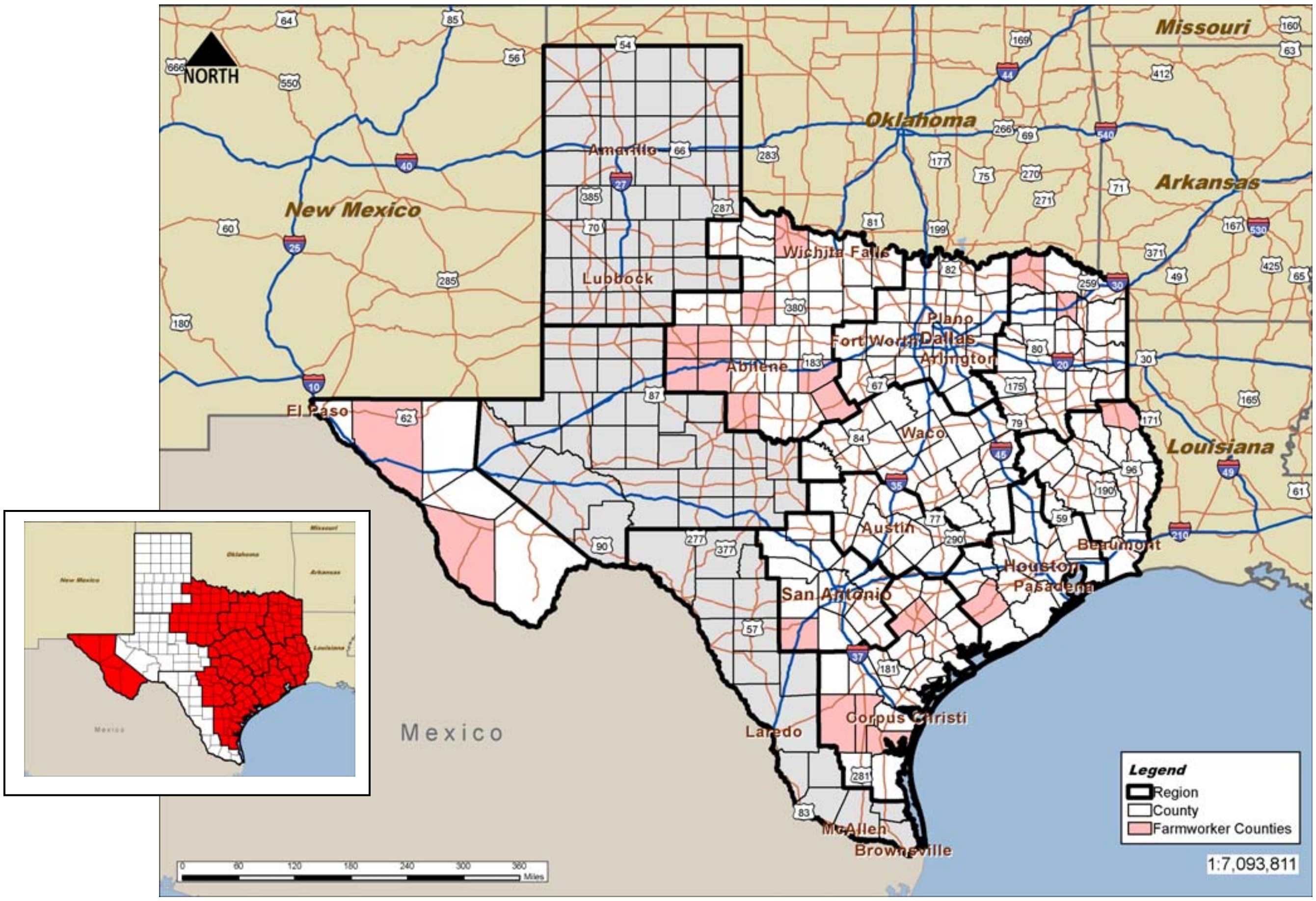
	Farmworkers (Individuals) by Annual Income (2010)				
	Less than $10,000	$10,000 - $19,999	$20,000 - $29,999	$30,000 & Higher	Total
Dawson	331	706	316	150	1,503
Gaines	505	1,078	482	229	2,293
Glasscock	56	120	54	26	256
Howard	61	131	59	28	279
Martin	83	177	79	38	376
Reeves	30	63	28	13	134
Region 12	**1,065**	**2,276**	**1,017**	**484**	**4,842**

Source: Bowen National Research; NAWS (2005 to 2009)

The number of farmworkers by income level were considered in the demand estimates included in Section VI of this report.

Balance of State Region

The balance of farmworker counties that did not fall in regions 1, 11 or 12, but that met the definition of rural farmworker counties for the purposes of this analysis were grouped and evaluated as the Balance of State Region. There are 20 counties that fall within the Balance of State Region. The map below identifies the 20 selected counties.



Bowen National Research

The following table compares the estimated number of farmworkers for each of the selected farmworkers counties within the region.

	Estimated Farmworkers					
	2000 Enumeration Profile		2007 Census of Agriculture		2010 Bowen National Research	
	Number	Percent	Number	Percent	Number	Percent
Comanche	1,708	8.1%	1,109	8.7%	304	2.2%
DeWitt	1,722	8.1%	789	6.2%	1,629	11.9%
Duval	760	3.6%	806	6.3%	69	0.5%
Eastland	653	3.1%	500	3.9%	992	7.2%
Fisher	717	3.4%	303	2.4%	348	2.5%
Frio	3,299	15.6%	1,128	8.8%	1,091	7.9%
Haskell	1,142	5.4%	351	2.7%	542	3.9%
Hudspeth	2,117	10.0%	342	2.7%	505	3.7%
Jim Wells	1,141	5.4%	598	4.7%	190	1.4%
Kleberg	793	3.7%	492	3.8%	306	2.2%
Lamar	954	4.5%	580	4.5%	155	1.1%
Mitchell	646	3.0%	214	1.7%	249	1.8%
Nolan	544	2.6%	288	2.2%	131	1.0%
Presidio	923	4.4%	591	4.6%	890	6.5%
Runnels	519	2.4%	444	3.5%	262	1.9%
Scurry	649	3.1%	319	2.5%	148	1.1%
Shelby	574	2.7%	1,034	8.1%	459	3.3%
Titus	734	3.5%	382	3.0%	792	5.8%
Wharton	1,020	4.8%	2,230	17.4%	4,370	31.8%
Wilbarger	598	2.8%	316	2.5%	310	2.3%
Region Balance	**21,213**	**100.0%**	**12,816**	**100.0%**	**13,744**	**100.0%**

Bowen National Research estimates that 13,744 farmworkers are within this region; the largest number of farmworkers within the four study regions. Wharton County has the largest number of farmworkers in the region, with 4,370 workers. These workers represent nearly one-third (31.8%) of all farmworkers in the region. The only other counties with more than 1,000 farmworkers are Frio (1,091) and DeWitt (1,629). These three counties likely have the greatest need for farmworker housing. Combined, these counties represent nearly 20.0% of all farmworkers in the region. Only Duval (69), Jim Wells (190), Lamar (155), Nolan (131) and Scurry (148) Counties have less than 200 farmworkers. These counties likely have the least need for farmworker housing.

The following table compares the estimated number of reported and unreported farmworkers for each of the selected farmworkers counties within the region.

	Estimated Reported & Unreported Farmworkers (2010)					
	Reported		Unreported		Total	
	Number	Percent	Number	Percent	Number	Percent
Comanche	121	2.2%	183	2.2%	304	2.2%
DeWitt	650	11.9%	979	11.9%	1,629	11.9%
Duval	27	0.5%	41	0.5%	69	0.5%
Eastland	396	7.2%	596	7.2%	992	7.2%
Fisher	139	2.5%	209	2.5%	348	2.5%
Frio	435	7.9%	655	7.9%	1,091	7.9%
Haskell	216	3.9%	326	3.9%	542	3.9%
Hudspeth	202	3.7%	304	3.7%	505	3.7%
Jim Wells	76	1.4%	114	1.4%	190	1.4%
Kleberg	122	2.2%	184	2.2%	306	2.2%
Lamar	62	1.1%	93	1.1%	155	1.1%
Mitchell	99	1.8%	150	1.8%	249	1.8%
Nolan	52	0.9%	79	1.0%	131	1.0%
Presidio	355	6.5%	535	6.5%	890	6.5%
Runnels	105	1.9%	158	1.9%	262	1.9%
Scurry	59	1.1%	89	1.1%	148	1.1%
Shelby	183	3.3%	276	3.3%	459	3.3%
Titus	316	5.8%	476	5.8%	792	5.8%
Wharton	1,744	31.8%	2,627	31.8%	4,370	31.8%
Wilbarger	124	2.3%	186	2.3%	310	2.3%
Region Balance	**5,484**	100.0%	**8,260**	100.0%	**13,744**	100.0%

Over 60% of all farmworkers in this region are *unreported* workers.

The estimated number of migrant and seasonal farmworkers by county for the region is compared in the following table:

	Estimated Migrant & Seasonal Farmworkers (2010)					
	Migrant		Seasonal		Total	
	Number	Percent	Number	Percent	Number	Percent
Comanche	141	46.3%	163	53.7%	305	2.2%
DeWitt	1,600	98.2%	28	1.7%	1,629	11.9%
Duval	37	53.4%	32	46.6%	69	0.5%
Eastland	508	51.1%	485	48.9%	993	7.2%
Fisher	159	45.7%	189	54.3%	348	2.5%
Frio	499	45.7%	592	54.3%	1,091	7.9%
Haskell	248	45.7%	294	54.3%	543	3.9%
Hudspeth	231	45.7%	274	54.3%	506	3.7%
Jim Wells	128	67.3%	62	32.7%	191	1.4%
Kleberg	162	52.8%	145	47.2%	307	2.2%
Lamar	111	71.8%	44	28.2%	155	1.1%
Mitchell	114	45.7%	135	54.3%	249	1.8%
Nolan	66	50.2%	65	49.8%	132	1.0%
Presidio	588	66.1%	302	33.9%	890	6.5%
Runnels	120	45.9%	142	54.1%	263	1.9%
Scurry	68	45.6%	80	54.2%	148	1.1%
Shelby	258	56.3%	201	43.7%	460	3.3%
Titus	792	100.0%	0	0.0%	793	5.8%
Wharton	2,224	50.9%	2,147	49.1%	4,371	31.8%
Wilbarger	170	54.7%	141	45.3%	311	2.3%
Region Balance	8,222 (59.8%)	41.1%	5,522 (40.2%)	38.0%	13,744	100.0%

DeWitt County, which has the second highest number of farmworkers in the region, is almost exclusively (98.2%) comprised of migrant farmworkers. Only an estimated 28 farmworkers are in DeWitt County. While most counties in the region have a relatively even split between migrant and seasonal farmworkers, Jim Wells, Lamar, Presidio and Titus Counties have two-thirds or more of their farmworkers consists of migrant farmworkers. It is of note that all 792 farmworkers in Titus County are migrant farmworkers. The overall region’s share of migrant farmworkers is 59.8%.

The estimated distribution of households by income for each of the counties within the study region for 2010 is illustrated in the following table:

	Farmworkers (Individuals) by Annual Income (2010)				
	Less than $10,000	$10,000 - $19,999	$20,000 - $29,999	$30,000 & Higher	Total
Comanche	67	143	64	30	304
DeWitt	358	766	342	163	1,629
Duval	15	32	14	7	69
Eastland	218	466	208	99	992
Fisher	77	164	73	35	348
Frio	240	513	229	109	1,091
Haskell	119	255	114	54	542
Hudspeth	111	238	106	51	505
Jim Wells	42	89	40	19	190
Kleberg	67	144	64	31	306
Lamar	34	73	32	15	155
Mitchell	55	117	52	25	249
Nolan	29	62	28	13	131
Presidio	196	418	187	89	890
Runnels	58	123	55	26	262
Scurry	33	70	31	15	148
Shelby	101	216	96	46	459
Titus	174	372	166	79	792
Wharton	962	2,054	918	437	4,370
Wilbarger	68	146	65	31	310
Region Balance	**3,024**	**6,459**	**2,886**	**1,374**	**13,744**

Source: Bowen National Research; NAWS (2005 to 2009)

The number of individual farmworkers by county and region were used in our demand estimates in Section VI of this report.

IV. ECONOMIC ANALYSIS

The economic characteristics and trends of a market or region can have a significant impact on an area's current and potential housing needs. Therefore, we have evaluated several economic variables for each of the four subject regions. It is important to note that the data presented only includes the selected counties that were rural farmworkers counties, and does not include data regarding excluded counties that fall within the regions.

Specific economic data sets include the following:

- Employment by Job Sector
- Employment Industry Growth (2000 to 2010)
- Wages by Occupation
- Annual Employment Growth (2006 to 2011)
- Annual Unemployment Rates (2006 to 2011)
- Number of Farms and Farm Sizes (Acres)
- Changes in Farmland Acreage (2002 to 2007)
- Annual Crop Production (by Value)
- Annual Crop Production (by Acreage)

Evaluating these economic data sets can provide insight as to strengths and weaknesses, help identify positive and negative trends, and provide information that can help explain current housing conditions or assist in anticipating future housing needs. For example, areas with diverse economic bases often have a better ability to withstand economic downturns than areas with a heavy reliance on a single industry sector. Markets with a large base of low-wage jobs often indicate that a market has a better potential opportunity to support affordable housing. Areas with growing unemployment can indicate an increasing need for additional affordable housing.

The tables on the following pages summarize economic data sets for each of the subject regions.

A. REGIONAL COMPARISON

The following is a summary of key findings from the economic analysis of the study regions, as well as the overall state of Texas.

Overall Economic Trends

Since 2006, Region 11 (South Texas Border Region) has experienced the greatest job growth, adding 6,830 jobs, or an increase of 8.7% over the past five years. This region has also experienced positive job growth over the past two years, while the other regions' job bases have remained relatively stagnant. All four regions, however, have experienced positive growth between 2006 and 2011, despite the national recession which had an adverse impact on job growth in many regions of the nation. Compared with the state of Texas overall job growth rate of 3.5% since 2008, the four study regions have a combined job growth rate of 0.9%. While slower than the state average, this growth rate is not unusual for rural markets.

The unemployment rate is highest in Region 11, at 13.8%, and lowest at 6.7% in Region 1. Overall, unemployment rates have risen in each region since 2006. While the unemployment rates within the four study regions are generally higher than the overall state average (7.9% - September 2011), they appear to have stabilized over the past two years, as the national economy has stabilized.

Primary farming activity within the four study regions, based on crops harvested by acres, is concentrated among the Cotton, Sorghum for Grain, Forage (Hay, Grass, etc.), Wheat, and Peanuts. Cotton harvesting is the largest of the crops harvested and is generally considered a labor-intensive crops, requiring a large base of farmworkers. Many of the other top harvested crops more heavily involve mechanization, reducing the need for farmworkers. However, given the dominance of Cotton harvesting (it is the largest or second largest harvested crop in each of the four study regions), the need for farmworkers within each region exists.

According to the U.S. Census and national demographic provider ESRI, the Agriculture-related jobs experienced an overall decline of 18,656 jobs within the four combined rural study regions between 2000 and 2010. This represented the largest decrease within any industry within the rural study regions, with Manufacturing being the second largest decline at 6,306. Within the individual study regions, Agriculture-related jobs declined during this time period as follows: Region 1 (High Plains Region) 6,945 jobs lost, Region 11 (South Texas Border Region) 2,774 jobs lost), Region 12 (West Texas Region) 1,204 jobs lost and Balance of State Region 7,732 jobs lost. While these job losses are not all among migrant and seasonal farmworkers, the Agriculture-related job losses likely correlate to migrant and seasonal farmworker job losses.

1. EMPLOYMENT BY JOB SECTOR

The largest five industries per region are illustrated in the below table:

	Top 5 Largest Industries						
	Industry 1	Industry 2	Industry 3	Industry 4	Industry 5	Remaining Industries	Total
Region 1 High Plains	Educational Services (15.7%)	Retail Trade (12.9%)	Health Care & Social Assistance (12.3%)	Manufacturing (11.7%)	Public Administration (7.8%)	39.6%	68,434
Region 11 South Texas Border	Educational Services (14.9%)	Public Administration (14.2%)	Retail Trade (14.1%)	Health Care & Social Assistance (13.2%)	Accommodation & Food Services (8.0%)	35.6%	57,491
Region 12 West Texas	Educational Services (13.4%)	Health Care & Social Assistance (12.3%)	Retail Trade (10.9%)	Public Administration (9.8%)	Construction (6.6%)	47.0%	26,111
Balance of State Region	Health Care & Social Assistance (13.8%)	Retail Trade (12.5%)	Educational Services (11.9%)	Manufacturing (11.1%)	Construction (8.7%)	42.0%	139,662
Sum of Regions	Educational Services (13.5%)	Health Care & Social Assistance (13.2%)	Retail Trade (12.8%)	Public Administration (9.5%)	Manufacturing (9.5%)	41.6%	291,698
State of Texas	Retail Trade (13.1%)	Health Care & Social Assistance (12.3%)	Educational Services (8.9%)	Manufacturing (8.7%)	Accommodation & Food Services (8.1%)	48.9%	10,187,060

Source: 2000 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

As the preceding table, agriculture does not comprise the top five industries within any of the four regions studied. Instead, Education, Health Care, and Retail Trade are the most common employment industries.

Employment by industry growth, between 2000 and 2010 is illustrated in the below table:

	Top 5 Largest Changes between 2000 and 2010				
	Industry 1	**Industry 2**	**Industry 3**	**Industry 4**	**Industry 5**
Region 1 High Plains	**-6,945** (Agriculture, Forestry, Fishing & Hunting)	**2,529** (Wholesale Trade)	**2,462** (Educational Services)	**1,730** (Health Care & Social Assistance)	**1,418** (Public Administration)
Region 11 South Texas Border	**3,253** (Public Administration)	**-3,172** (Construction)	**-2,775** (Agriculture, Forestry, Fishing & Hunting)	**-2,302** (Manufacturing)	**-1,939** (Transportation & Warehousing)
Region 12 West Texas	**-1,204** (Agriculture, Forestry, Fishing & Hunting)	**936** (Administrative, Support, Waste Management & Remediation Services)	**-807** (Mining)	**-669** (Manufacturing)	**527** (Public Administration)
Balance of State Region	**-7,732** (Agriculture, Forestry, Fishing & Hunting)	**-3,245** (Manufacturing)	**2,770** (Public Administration)	**2,522** (Wholesale Trade)	**-2,351** (Transportation & Warehousing)
Sum of Regions	**-18,656** (Agriculture, Forestry, Fishing & Hunting)	**7,968** (Public Administration)	**6,957** (Wholesale Trade)	**-6,306** (Manufacturing)	**-5,377** (Transportation & Warehousing)
State of Texas	**345,031** (Health Care & Social Assistance)	**259,904** (Accommodation & Food Services)	**245,577** (Wholesale Trade)	**226,517** (Retail Trade)	**-203,280** (Manufacturing)

Source: 2000 Census; ESRI; Urban Decision Group; Bowen National Research
Note: data is limited to only the counties that met the farmworker county designation

It is significant that within each of the four regions, the Agriculture-related industry was among the top three industries that experienced the greatest change over the past 10 years. In each case, the change was negative, ranging from 1,204 jobs lost in Region 12 to 7,732 jobs lost in the Balance of State Region. The Agriculture-related industry lost a combined 18,656 jobs within the four study regions between 2000 and 2010. It should be noted that we did not identify any projections for future agriculture-specific crops. While such projections were not provided, it is reasonable to conclude that the negative job growth trend in the Agriculture-related industry from the past decade will likely continue to some degree.

2. EMPLOYMENT GROWTH

The following illustrates the total employment base by region:

		Total Employment					
		2006	2007	2008	2009	2010	2011*
Region 1 High Plains	Number	78,193	79,119	81,711	82,099	81,301	80,712
	Change	-	1.2%	3.3%	0.5%	-1.0%	-0.7%
Region 11 South Texas Border	Number	79,325	79,959	81,853	84,120	85,838	86,155
	Change	-	0.8%	2.4%	2.8%	2.0%	0.4%
Region 12 West Texas	Number	29,929	30,762	31,332	31,714	31,707	31,662
	Change	-	2.8%	1.9%	1.2%	0.0%	-0.1%
Balance of State Region	Number	173,560	175,423	176,740	175,630	176,629	176,261
	Change	-	1.1%	0.8%	-0.6%	0.6%	-0.2%
Sum of Regions	Number	361,007	365,263	371,636	373,563	375,475	374,790
	Change		1.2%	1.7%	0.5%	0.5%	-0.2%
State of Texas	Number	10,757,510	10,914,098	11,079,931	11,071,106	11,264,748	11,464,525
	Change	-	1.5%	1.5%	-0.1%	1.7%	1.8%

Source: U.S. Department of Labor, Bureau of Labor Statistics
Note: data is limited to only the counties that met the farmworker county designation
*Through September

Since 2006, Region 11 has experienced the greatest job growth, adding 6,830 jobs, or an increase of 8.7% over the past five years. This region, has also experienced positive job growth over the past two years, while the other regions' job bases have remained relatively stagnant. All four regions, however, have experienced positive growth between 2006 and 2011, despite the national recession which had an adverse impact on job growth in many regions of the nation.

3. UNEMPLOYMENT RATES

The following illustrates the total unemployment base by region:

		Unemployment Rate					
		2006	2007	2008	2009	2010	2011*
Region 1 High Plains	Number	4.7%	4.1%	4.1%	6.0%	6.5%	6.7%
	Change	-	-0.6	0.0	1.9	0.5	0.2
Region 11 South Texas Border	Number	9.5%	8.6%	9.0%	12.6%	13.4%	13.8%
	Change	-	-0.9	0.3	3.6	0.8	0.4
Region 12 West Texas	Number	5.2%	4.3%	4.7%	7.5%	7.5%	7.4%
	Change	-	-0.9	0.4	2.8	0.0	-0.1
Balance of State Region	Number	4.9%	4.3%	4.7%	7.5%	8.1%	8.1%
	Change	-	-0.6	0.4	2.8	0.6	0.0
Sum of Regions	Number	5.9%	5.2%	5.5%	8.4%	9.0%	9.1%
	Change	-	-0.7	0.3	2.9	0.6	0.2
State of Texas	Number	4.9%	4.4%	4.9%	7.5%	8.2%	7.9%
	Change	-	-0.5	0.5	2.6	0.7	-0.3

Source: U.S. Department of Labor, Bureau of Labor Statistics
Note: data is limited to only the counties that met the farmworker county designation
*Through September

The unemployment rate is highest in Region 11, at 13.8%.

4. NUMBER OF FARMS & FARM SIZES

Within the 49 study counties that fall within the four study regions, there are 33,451 farms, according to the 2007 Census of Agriculture. The Balance of the State Region, which contains 20 counties, has the largest number of farms at 18,256. This region also has the most acres of farmland, at 13,388,804 acres. Region 1 also has a notable number of farms, with 8,867 farms and 8,4,24,801 acres of land. The following table illustrates the distribution of farms and farmland acreage by region.

	Farms and Farmland Sizes by Region		
	Number of Farms	Land in Farms (Acres)	Average Size (Acres)
Region 1 High Plains	8,867	8,424,801	950.1
Region 11 South Texas Border	3,559	5,408,131	1,519.6
Region 12 West Texas	2,769	4,016,674	1,450.6
Balance of State Region	18,256	13,539,198	741.6
Total	**33,451**	**31,388,804**	**938.3**

Source: 2007 Census of Agriculture
Note: data is limited to only the counties that met the farmworker county designation

While Regions 11 and 12 have the fewest number of farms and the lowest amount of farmland acreage, the regions contain the largest average sized farms. Region 11 farms are an average of 1,519.6 acres per farm, while Region 12 is comparable, with 1,450.6 acres per farm.

The number of farms and harvested farmland acreage in 2002 and 2007, as well as the change that has occurred during this five year span, for each of the four regions is summarized in the following table (Note: The table below shows *harvested* farmland acreage, while the table above is total acreage, regardless if it is harvested for crops or not).

	Change in Farms and Farmland Acreage (2002 to 2007) Of Harvested Cropland					
	2002		2007		Change	
	Farms	Acres	Farms	Acres	Farms	Acres
Region 1 High Plains	4,435	3,110,199	4,089	3,494,398	-346	384,199
Region 11 South Texas Border	910	272,696	933	335,378	23	62,682
Region 12 West Texas	1,282	883,244	1,271	1,092,588	-11	209,344
Balance of State Region	8,086	1,909,351	8,211	1,795,818	125	-113,533
Total	**14,713**	**6,175,490**	**14,504**	**6,718,182**	**-209**	**542,692**

Source: 2007 Census of Agriculture
Note: data is limited to only the counties that met the farmworker county designation

The total number of farms in Region 1 decreased significantly, losing 346 farms (7.8%) between 2002 and 2007, yet the region expanded its harvested farm acreage by 384,199, or 12.4%. Conversely, the Balance of the State Region added 125 farms, yet lost 113,533 (6.0%) acres during this same time. Overall, the study regions combined lost 209 farms but added over a half million acres of farmland.

5. PRIMARY CROPS

According to data obtained from the Texas Department of Agriculture dated July of 2010, Texas is one of the largest agricultural states in the nation, accounting for about 6 percent of the total agricultural income in the United States. The agricultural industry in Texas generates more then $100 billion annually for the state's economy and is the second-largest resource-based industry in Texas.

The state ranks first in the nation in the number of cattle and calves, accounting for 14 percent of the U.S. total in 2010 and is also the top producer of cotton, hay, sheep, wool, goats, mohair and horses. Texas exports about $6 billion worth of agricultural products to other countries annually, with the state's top exports including live animals and meat; cotton and cottonseed; feed grains and products; hides and skins; wheat and products; and feeds and fodder.

As well as crops and livestock, the state's agricultural industry also includes timber/forestry, aquaculture, apiculture (beekeeping) and nursery/ greenhouse products. With approximately 86 percent of the land in Texas in some form of agricultural production, Texas leads the nation in the number of farms and ranches and other types of land used for agricultural production and 99 percent of Texas' agricultural operations are still run by individuals or families.

Based on 2010 Texas Department of Agriculture data, the agricultural industry employs one out of every seven working Texans.

Texas agriculture has faced a variety of extreme challenges between 2010 and 2011, from record breaking drought and heat to an unprecedented wildfire season.

The historic Texas drought has led to an estimated record $5.2 billion in agricultural losses, making the drought that began for much of the state in September of 2010 the most costly drought on record, according to the Texas AgriLife Extension Service of Texas A&M University. The drought, coupled with high winds and record temperatures fueled the wildfires, which as of October 2011 had burned approximately 4 million acres in Texas.

The drought and wildfires had an impact on agricultural activity in Texas and on occupancies at farmworker housing facilities in 2011.

The top three crops by value within each of the four study regions are summarized on the following table:

	Primary Crops by Value by Region								
	Top Crop Type			Second Crop Type			Third Crop Type		
	Crop	Farms	Value	Crop	Farms	Value	Crop	Farms	Value
Region 1 High Plains	Livestock, Poultry, & Their Products	2,188	$3,131,618	Cotton	2,445	$684,701	Grains, Oil Seeds, Beans, Peas	2,493	$546,482
Region 11 South Texas Border	Livestock, Poultry, & Their Products	1,967	$198,830	Grains, Oil Seeds, Beans, Peas	287	$52,021	Sorghum	230	$39,593
Region 12 West Texas	Cotton	1,013	$324,160	Other Crops & Hay	394	$66,470	Livestock, Poultry, & Their Products	583	$34,167
Balance of State Region	Livestock, Poultry, & Their Products	10,648	$1,034,378	Grains, Oil Seeds, Bean & Peas	1,528	$170,560	Cotton	808	$133,313

Source: 2007 Census of Agriculture

Note: data is limited to only the counties that met the farmworker county designation

As the preceding table illustrates, the top crop (in terms of acreage) within Region 1 is Livestock, Poultry, and Their Products. These same agricultural-related industries are the primary farming industries in Region 11 and in the Balance of State Region, while Cotton is the primary crop in Region 12.

The top three crops by acreage within each of the four study regions are summarized on the following table:

	Primary Crops by Acres by Region								
	Top Crop Type			Second Crop Type			Third Crop Type		
	Crop	Farms	Acres	Crop	Farms	Acres	Crop	Farms	Acres
Region 1 High Plains	Cotton	2,445	1,674,110	Wheat	1,771	717,471	Sorghum for Grain	1,344	425,876
Region 11 South Texas Border	Sorghum for Grain	232	151,661	Cotton	104	56,067	Forage (Hay Grass, Etc)	578	45,295
Region 12 West Texas	Cotton	1,013	880,248	Peanuts	224	62,887	Wheat	183	58,996
Balance of State Region	Forage (Hay, Grass, Etc)	6,665	484,098	Cotton	807	454,048	Wheat	916	376,199

Source: 2007 Census of Agriculture

Note: data is limited to only the counties that met the farmworker county designation

Cotton is the primary harvested crop by acreage in Regions 1 and 12. Sorghum for Grain is the primary crop in Region 11 and Forage (hay, grass, etc.) is the primary crop in the Balance of State Region.

Labor intensive crops are often those associated with the harvesting of vegetables, fruits and nuts. The following table summarizes the number of farms and harvested acres for these types of crops.

	Vegetables, Fruits, and Nuts by Harvested Acres by Region							
	Vegetables		Fruits		Nuts*		Total	
	Farms	Acres	Farms	Acres	Farms	Acres	Farms	Acres
Region 1 High Plains	104	14,881	32	438	360	84,748	496	100,067
Region 11 South Texas Border	69	10,094	12	70	22	1,136	103	11,300
Region 12 West Texas	19	5,392	0	0	230	63,269	249	68,661
Balance of State Region	144	14,656	88	585	550	45,365	782	60,606

Source: 2007 Census of Agriculture
Note: data is limited to only the counties that met the farmworker county designation
*Includes peanuts along with tree nuts

There are 1,630 farms with a combined 240,634 acres within the rural regions of Texas that include the farming of vegetables, fruits and nuts. The largest number of farms for these specified crops is in the Balance of State Region, which total 782 farms and comprise nearly half of these specified farms. Region 1 (High Plains Region) comprises the largest total acreage of the specified crops in the above-referenced table. These two preceding regions also have the largest number of migrant and seasonal farmworkers.

B. INDIVIDUAL REGION OVERVIEWS

Region 1 (High Plains)

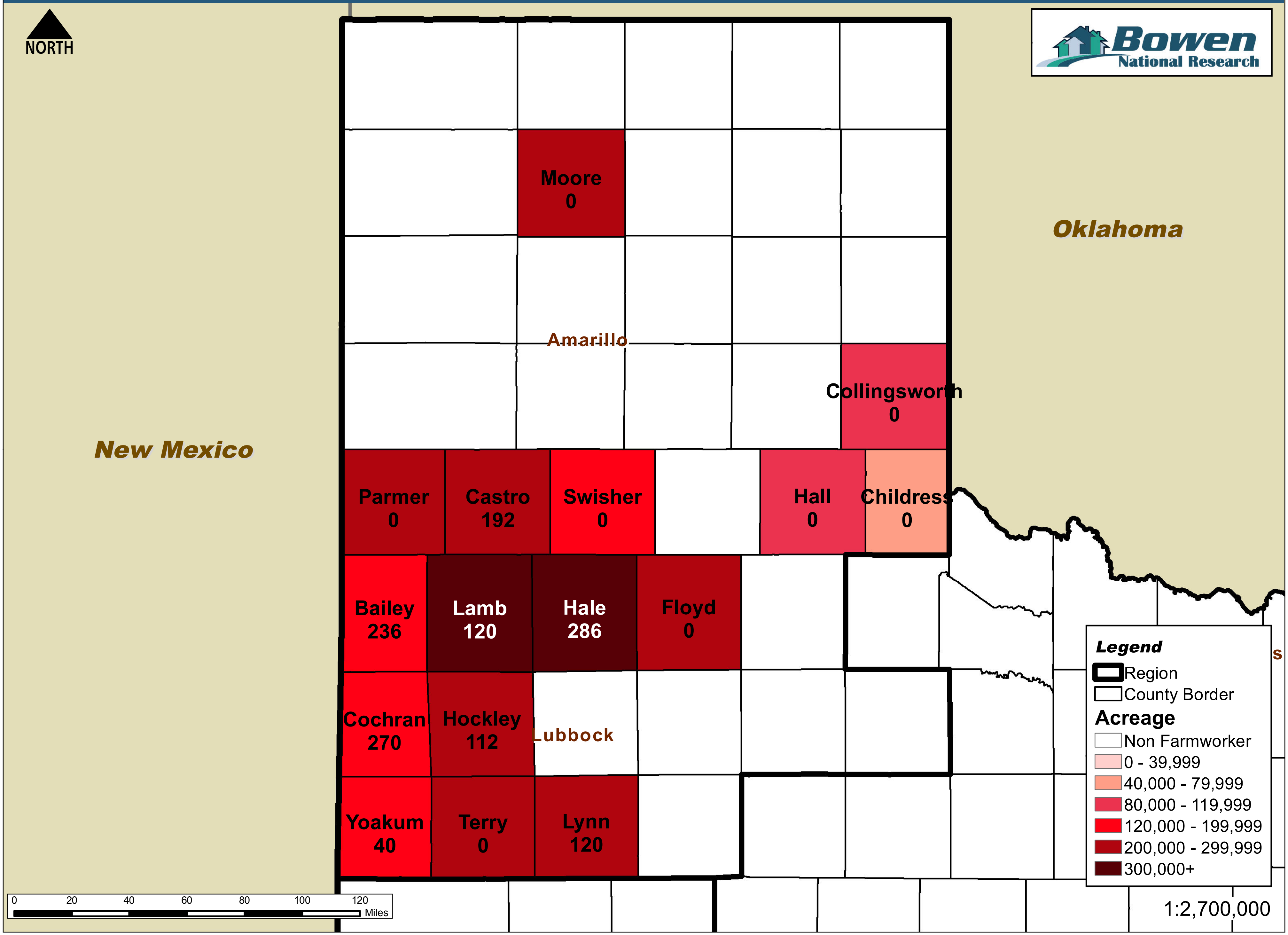
Region 1 is located in the northwestern portion of the state of Texas. This region includes at total of 41 counties, of which 16 were evaluated for rural farmworker demographics.

Economic Overview:

- The largest industry sectors in the region are (1) Educational Services, (2) Retail Trade, and (3) Health Care and Social Assistance.
- The industry sector with the largest change between 2000 and 2010 was Agricultural, Forestry, Fishing and Hunting sector, which lost 6,945 jobs during this time.
- Total employment in the region grew by over 2,500 jobs, or 3.2%, between 2006 and September 2011.
- The region's unemployment rate as of September 2011 was 6.7%.
- In terms of agricultural crop related activity, Cotton is the largest acreage of usage. This type of activity requires a notable number of farmworkers.
- This region was the only one of the four study regions to experience a decline in the number of farms between 2002 and 2007, losing 346 farms.
- Despite the decline in the number of farms, the region has added 384,199 acres of cropland between 2002 and 2007.
- Bowen National Research estimates that there are 11,074 farmworkers in the region, the second most among the four study regions.

The map on the following page compares the estimated harvested cropland acreage (shaded in red) with the farmworker-designated housing capacity (number) by county.

Region 1: Farmworker Housing Capacity & Harvested Cropland (Acreage)



Region 11 (South Texas Border)

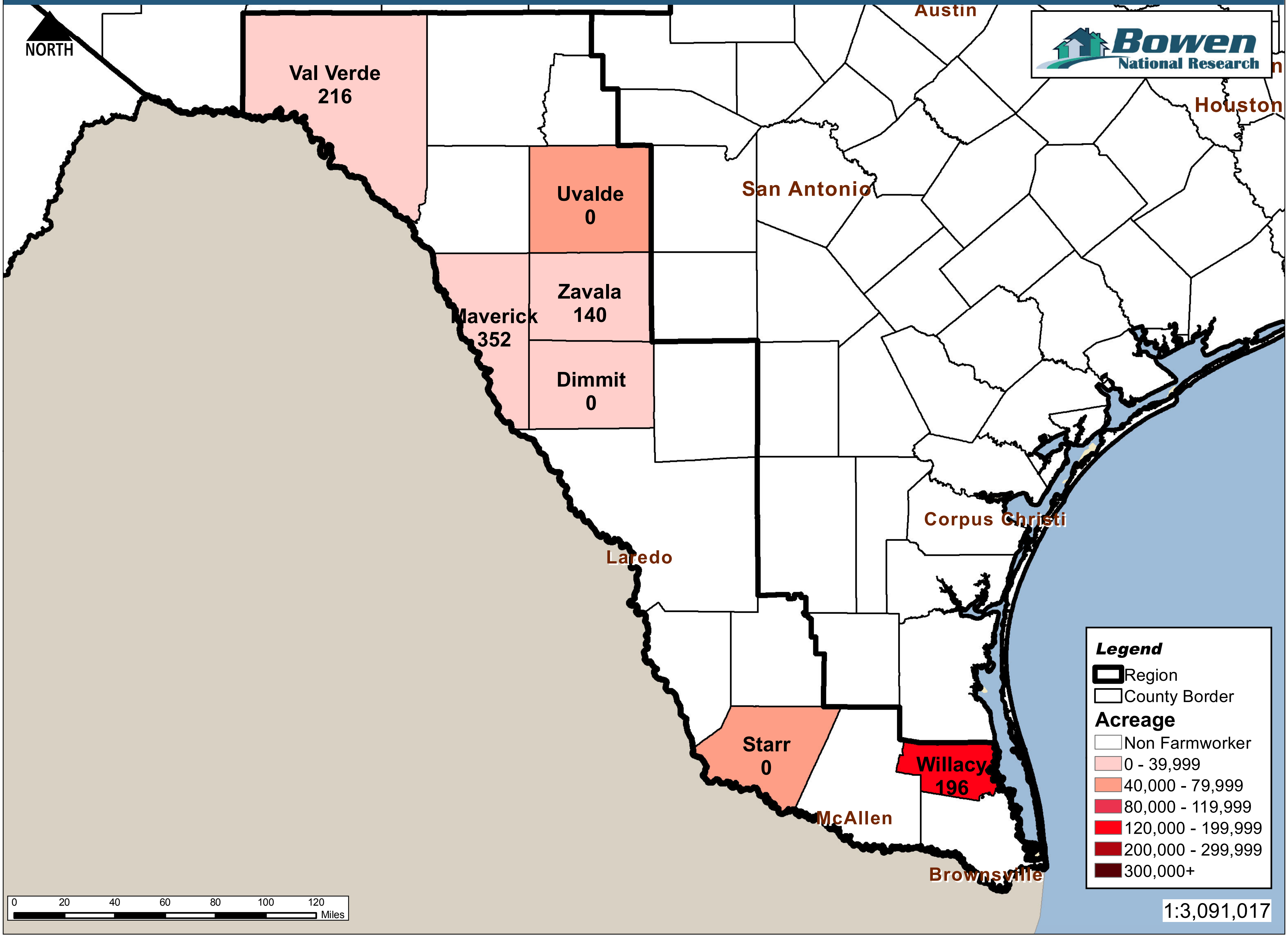
Region 11 is located in the far southern portion of the state of Texas. This region includes at total of 16 counties, of which seven were evaluated for rural farmworker demographics.

Economic Overview:

- The largest industry sectors in the region are (1) Educational Services, (2) Public Administration and (3) Retail Trade.
- The industry sector with the largest change between 2000 and 2010 was Public Administration which changed by 3,253 jobs during this time.
- Total employment in the region grew by nearly 7,000 jobs, or 8.6%, between 2006 and September 2011.
- The region's unemployment rate as of September 2011 was 13.8%, the highest among the four regions.
- Region 11 has the largest average size farms, at 1,519 acres.
- This region has the smallest amount of agricultural dedicated land among the four regions at 335,378 acres.
- Sorghum for Grain and Cotton are the two largest crop producing industries in the region.
- Bowen National Research estimates that there are 4,860 farmworkers in the region in 2010.
- The region grew in both the number of farms (23) and the acreage (62,682) between 2002 to 2007.

The map on the following page compares the harvested cropland acreage (shaded in red) with the farmworker-designated housing capacity (number) by county.

Region 11: Farmworker Housing Capacity & Harvested Cropland (Acreage)



Region 12 (West Texas)

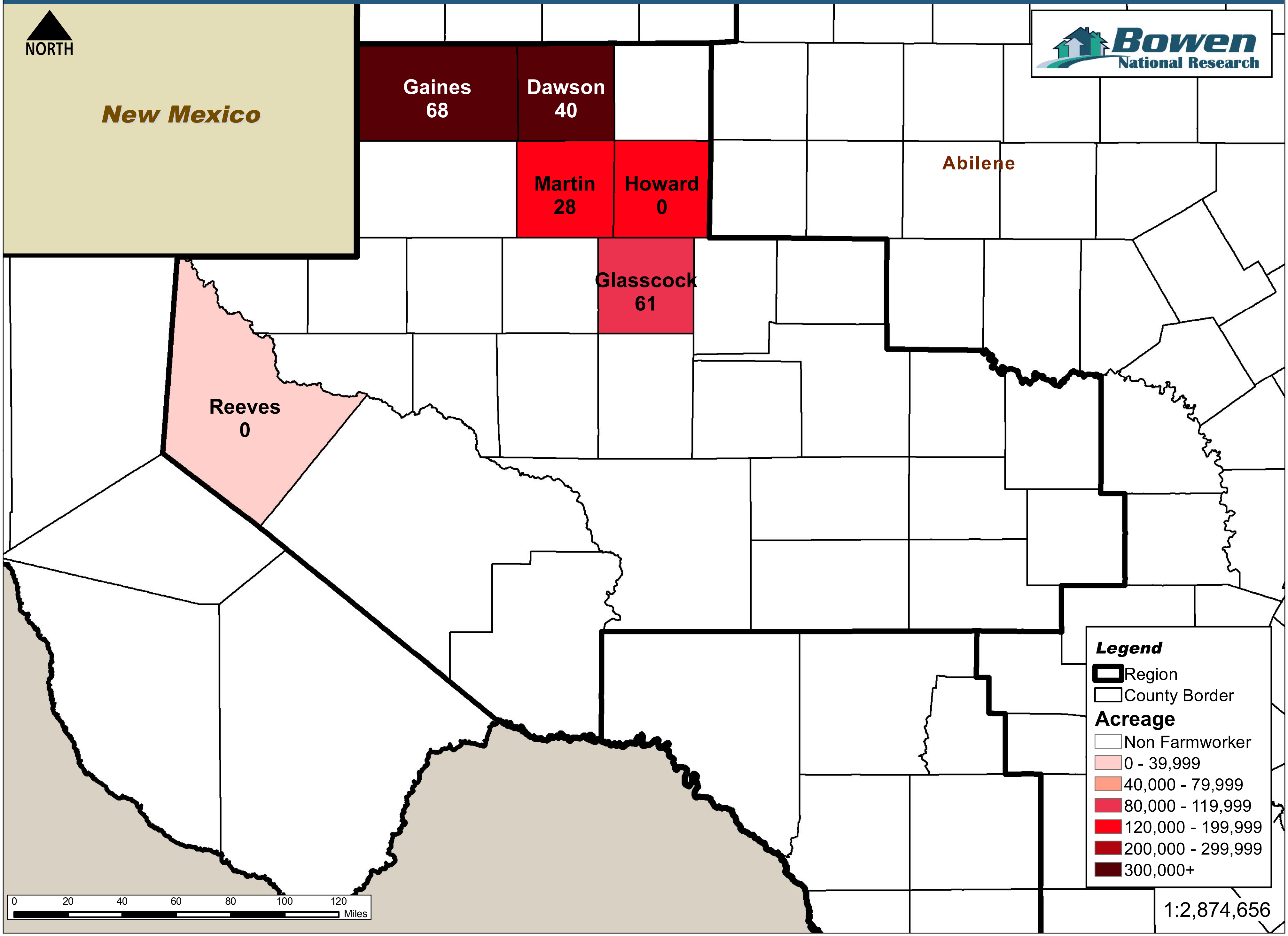
Region 12 is located in the western portion of the state of Texas. This region includes at total of 30 counties, of which 6 were classified as rural farmworker counties that were included in the following analysis.

Economic Overview:

- The largest industry sectors in the region are (1) Educational Services, (2) Health Care and Social Assistance, and (3) Retail Trade.
- The industry sector with the largest change between 2000 and 2010 was Agriculture, Forestry, Fishing and Hunting, which decreased by 1,204 jobs during this time.
- Total employment in the region increased by over 1,600 jobs, or 5.8%, between 2006 and September 2011.
- The region's unemployment rate as of September 2011 was 7.4%.
- This region has the least amount of farm acreage among the four areas at 4,016,674 between 2002 and 2007, yet added 209,344 acres.
- Cotton and Peanuts are the largest crop related dedicated farmland in the region.
- Bowen National Research estimates that there were 4,842 farmworkers in the region in 2010.

The map on the following page compares the harvested cropland acreage (shaded in red) with the farmworker-designated housing capacity (number) by county.

Region 12: Farmworker Housing Capacity & Harvested Cropland (Acreage)



Balance of State Region

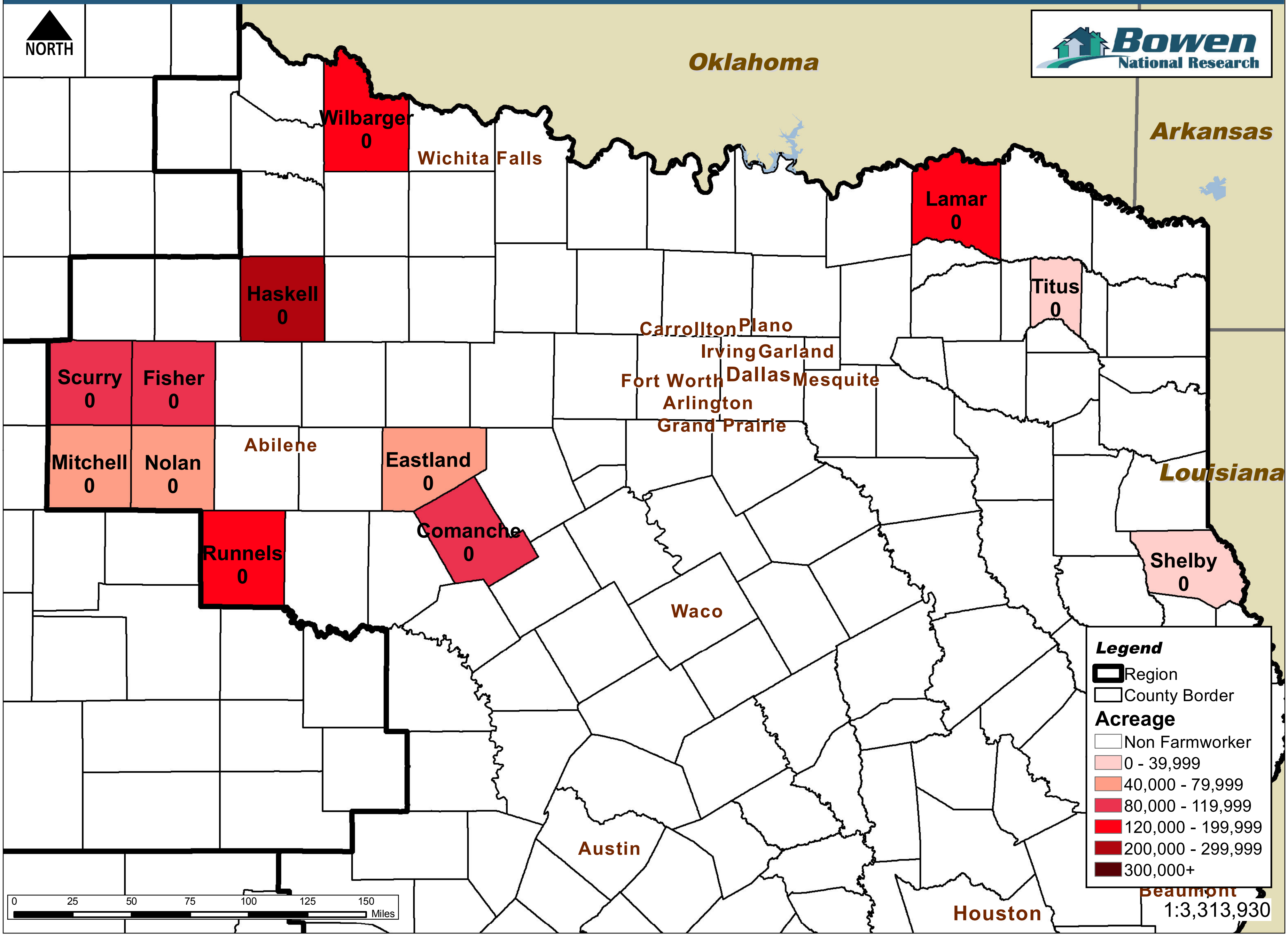
The balance of farmworker counties that did not fall in regions 1, 11 or 12, but that met the definition of rural farmworker counties for the purposes of this analysis were grouped and evaluated as the Balance of State Region. There are 20 counties that fall within the Balance of State Region.

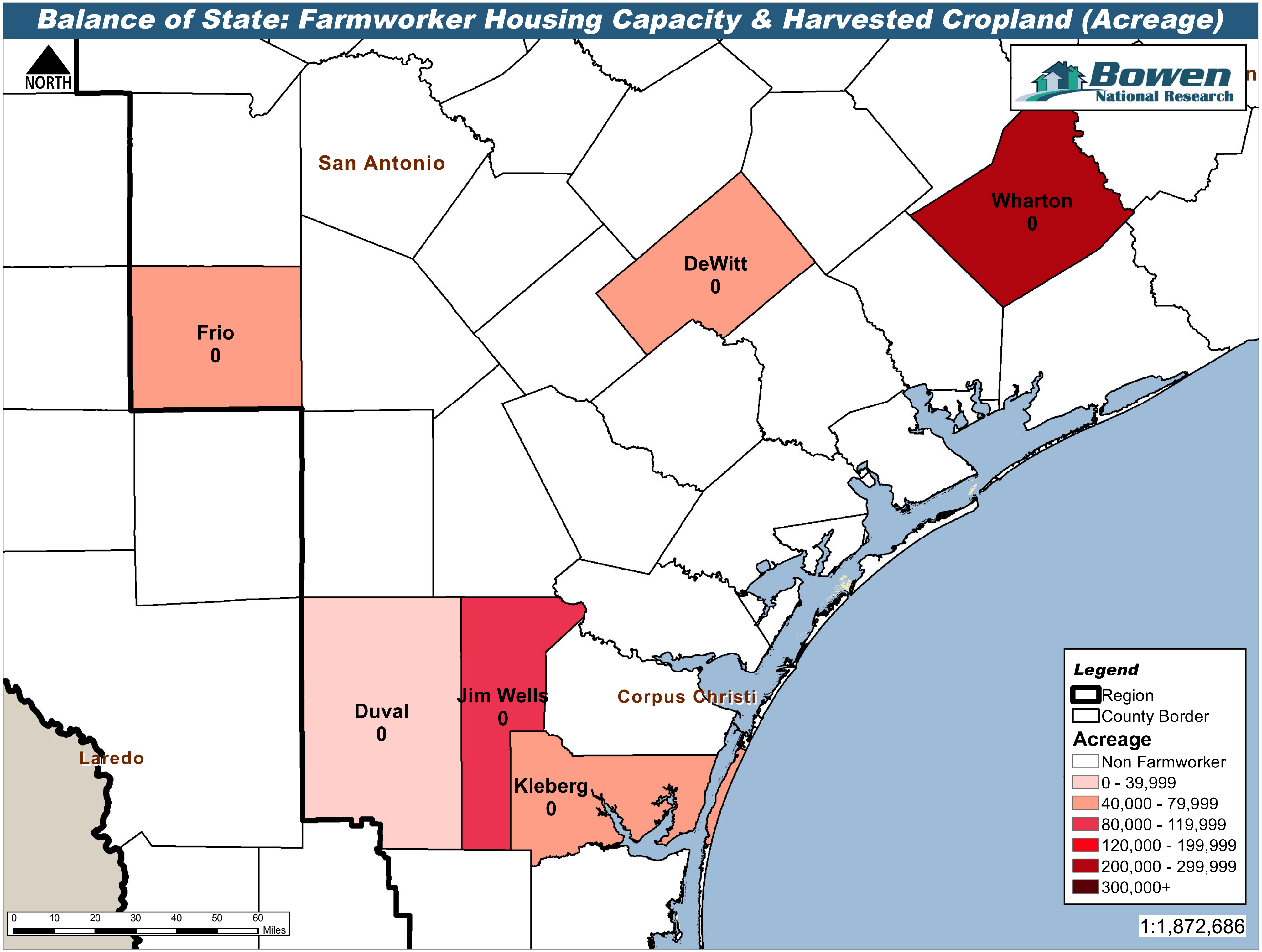
Economic Overview:

- The largest industry sectors in the region are (1) Health Care and Social Assistance, (2) Retail Trade and (3) Educational Services.
- The industry sector with the largest change between 2000 and 2010 was Agriculture, Forestry, Fishing and Hunting, which decreased by 7,732 jobs during this time.
- Total employment in the region grew by nearly 3,000 jobs, or 1.6% between 2006 and September 2011.
- The region's unemployment rate as of September 2011 was 8.1%.
- The region has the largest number of farms (18,256) and acreage (13,539,198). This region comprises approximately one-half of the farms and farmland of the study regions.
- The region added 125 farms but lost 113,533 acres of farmland between 2002 and 2007.
- In terms of farmland acreage, Forage (Hay, Grass, etc.) and Cotton are the largest crop uses in the region.
- Bowen National Research estimates that there are 13,744 farmworkers in the region.

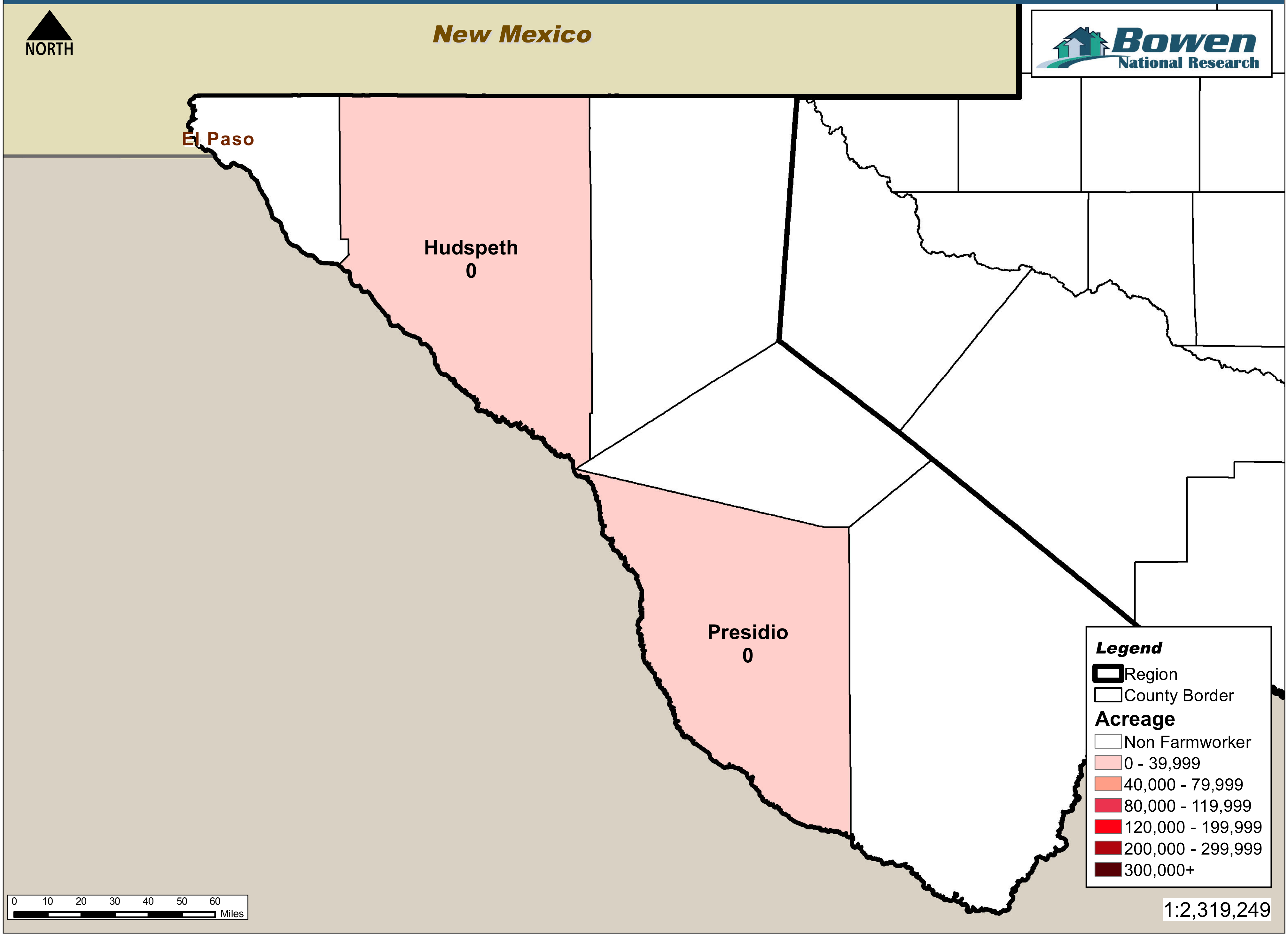
The maps on the following pages compare the estimated harvested cropland acreage (shaded in red) with the farmworker-designated housing capacity (number) by county. Please note that because of the geographic size of the Balance of State Region, three separate maps follow to show the data on a sub-regional level.

Balance of State: Farmworker Housing Capacity & Harvested Cropland (Acreage)




Balance of State: Farmworker Housing Capacity & Harvested Cropland (Acreage)
NORTH
Bowen
National Research
San Antonio
Wharton
0
DeWitt
0
Frio
0
Duval
0
Jim Wells
0
Corpus Christi
Kleberg
0
Laredo
Legend
Region
County Border
Acreage
Non Farmworker
0 - 39,999
40,000 - 79,999
80,000 - 119,999
120,000 - 199,999
200,000 - 299,999
300,000+
0 10 20 30 40 50 60
Miles
1:1,872,686

Balance of State: Farmworker Housing Capacity & Harvested Cropland (Acreage)



V. HOUSING SUPPLY ANALYSIS

Farmworker housing in Texas is available in a variety of types, structures, locations and quality. Some housing is on-farm, provided by the grower/employer as part of labor camps, while a variety of off-farm housing alternatives are offered in most markets. The most common housing alternatives available to farmworkers includes licensed migrant labor housing, USDA-financed housing specifically designated for farmworkers, conventional apartments, manufactured homes, single-family homes and a variety of non-conventional housing options such as hotels, RV's/campers, and, in some cases, tents.

Because of the temporary and seasonal nature of agricultural work, as well as the notable share of non-U.S. resident agriculture workers that migrate to and within the United States, the types of housing required to meet the needs of the farmworkers varies in location, duration, structure type, and specific accommodations. This has, naturally, resulted in a diverse housing stock designed to meet the broad needs of the farmworkers. This section evaluates the most common housing alternatives used by farmworkers in Texas.

Licensed Migrant Labor Housing

While the Texas Department of Housing and Community Affairs (TDHCA) does not currently fund housing specifically for migrant farmworkers, the inspection and licensing of migrant labor housing facilities is the responsibility of the TDHCA. These projects include apartments, dormitory and barracks style housing structures where workers are required to share living spaces with several other people, often in overcrowded housing situations. TDHCA's scope of migrant labor housing responsibilities includes evaluating the habitability of migrant labor housing. As of August 2011, TDHCA had identified 31 licensed migrant labor housing facilities within Texas. A total of 19 migrant labor housing facilities are within the areas we studied in this analysis. Though some migrant labor housing units are within Federally-financed properties (see: USDA/Rural Development Sections 514 & 516 Housing below), most housing is privately financed.

USDA/Rural Development Sections 514 & 516 Housing

Rural Housing Services administers the Farm Labor Housing and Grant program under Sections 514 and 516 of the Housing Act of 1949. This program provides direct loans and grants annually for the development, purchase, improvement, and repair housing for laborers employed on farms or associated with the handling or processing of off-farm industries. This includes both migrant and non-migrant farmworker housing. In order to be eligible to reside in USDA/RD 514 and 516 housing, residents must receive a substantial portion of their income through the primary product of agricultural or aquacultural commodities, or those involved in off-farm handling or processing of such commodities. Additional eligibility requirements include the residents being U.S. citizens or noncitizens with permanent residency status and program-eligible employment. Based on information provided by USDA, there are nine USDA/Rural Development 514 & 516 financed projects containing 384 units in the 4 regions included in this analysis. Bowen National Research surveyed all of these projects.

Non-Farmworker-Specific Affordable Apartments

According to information from the National Center for Farmworker Health, Incorporated (NCFH) approximately 50% of farmworkers live in housing that they rent from someone other than their employer. While affordable apartments developed under the Rural Development 515 and Low-Income Housing Tax Credit (LIHTC) programs are not built specifically for farmworkers, farmworkers are not prohibited from occupying units developed under these affordable housing programs. Based on inventories maintained by USDA and TDHCA, there are 310 affordable rental housing projects within the counties studied within the four regions.

Manufactured Homes

Manufactured homes, for the purposes of this analysis, consist of homes that meet the definition of a HUD Code manufactured home or a mobile home. This housing alternative may range from a single, isolated unit to units located within manufactured home communities. While there are no state or federal programs that specifically fund the development of manufactured housing or manufactured home communities, many of the manufactured homes are low-cost and provide an affordable housing alternative to farmworkers. According to American Community Survey, it is determined that there are approximately 31,743 manufactured/mobile home units within the study areas. Of these, 23,789 were owner-occupied and 7,954 were renter-occupied. Bowen National Research conducted a survey of manufactured home communities within each region to determine occupancy rates, rents/fees, and project features.

For-Sale Housing (Primary Single-Family Homes)

Single-family homes are located in each study area and range in a wide variety of product designs, ages and quality. Based on Census data, most single-family homes are owner-occupied. Bowen National Research conducted research to identify the available single-family rental alternatives offered in the study areas. A total of 2,480 housing units were identified as being for-sale within the study areas.

Non-Conventional Rentals and Living Arrangements

Non-conventional rentals are in a variety of forms, and include units over storefronts, RVs/campers, hotels/motels, and in some cases, tents, garages, sheds or other temporary shelter. Because such housing varies greatly and is not subject to federal or state regulations, data for such housing is not readily available or consistent. While small motels are rented on a weekly basis during the migratory farmworker season, we were unable to obtain specific rental information from these small properties due to the sensitivity of the migrant farmworker situation and presence of illegal immigrants in the migrant farmworking community. As a result, it is difficult to draw specific conclusions as to occupancy rates, rent levels and features. As such, Bowen National Research did not survey or evaluate such housing for this study.

Unlicensed Farmworker Housing

TDHCA is responsible for the licensing of migrant farmworker housing facilities and makes attempts to identify such housing. In instances where such housing is identified, TDHCA contacts the property owner to begin the licensing process. Currently, TDHCA has no record of unlicensed farmworker housing. During our research, Bowen National Research made inquiries with developers, housing authorities, planners and other stakeholders throughout the study regions as to whether or not they were aware of any possible unlicensed farmworker facilities within the studies. Based on these interviews, there were no known or disclosed unlicensed facilities.

A. REGIONAL COMPARISON

1. FARMWORKER-DESIGNATED RENTAL HOUSING

The following table lists the counties that were evaluated within each of the four subject regions.

Counties with 1,000+ Farmworkers by TDHCA Region			
Region 1			
Bailey	Collingsworth	Hockley	Parmer
Castro	Floyd	Lamb	Swisher
Childress	Hale	Lynn	Terry
Cochran	Hall	Moore	Yoakum
Region 11			
Dimmit	Starr	Val Verde	Zavala
Maverick	Uvalde	Willacy	-
Region 12			
Dawson	Glasscock	Martin	-
Gaines	Howard	Reeves	-
Balance of State			
Comanche	Frio	Lamar	Scurry
DeWitt	Haskell	Mitchell	Shelby
Duval	Hudspeth	Nolan	Titus
Eastland	Jim Wells	Presidio	Wharton
Fisher	Kleberg	Runnels	Wilbarger

The chart below reflects the number of projects, units and capacity of TDHCA licensed migrant labor housing and USDA/Rural Development 514 & 516 housing. Note that the estimated capacity for the USDA/RD 514 & 516 projects was calculated using two people per bedroom. Also note that if a project is licensed as TDHCA migrant housing and also operates under the USDA/Rural Development program, these units and projects have only been included as USDA/RD 514 & 516 housing inventory count below (there are only three of these projects with 103 units and a capacity for 386 people, all of which are located in Region 1).

	Rural Texas Farmworker-Designated Rental Housing Inventory 2011								
	Licensed Migrant Farmworker Housing			USDA/RD 514 & 516 Farmworker Housing			Total Farmworker Housing		
Region	Projects	Units	Capacity	Projects	Units	Capacity*	Projects	Units	Capacity
Region 1 (High Plains)	12	122	542	5	207	814	**17**	**329**	**1,356**
Region 11 (South Texas Border)	0	0	0	4	177	984	**4**	**177**	**984**
Region 12 (West Texas)	7	46	197	0	0	0	**7**	**46**	**197**
Balance of State Region	0	0	0	0	0	0	**0**	**0**	**0**
Total	19	168	739	9	384	1,798	**28**	**552**	**2,537**

*Based on two-persons per bedroom

Note: Data is limited to only the counties that met the farmworker county designation

The 28 farmworker-designated projects identified in the study areas have a combined 552 units with an estimated housing capacity for 2,537 people. Region 1, located in the far northern portion of the state, has the largest number of farmworker housing projects at 17 and the largest estimated capacity of 1,356 persons (more than one-half of the capacity in the study areas). Region 11 has a notable capacity for 984 persons, or 38.8% of the capacity of all regions combined. It is significant to note that the Region 12 has a capacity to house only 197 persons and The Balance of State Region does not have any farmworker housing within the rural farmworker counties within the region. Demand for farmworker-designated housing is strong, as evidenced by the high occupancy levels of these projects, which historically range between 90% and 100%. It is critical to note that the combined 75.5% occupancy rate of these projects from our late summer/early fall 2011 survey was caused by the drought and wildfires that impacted several agricultural areas of the state and *temporarily* lowered occupancies.

2. NON-FARMWORKER AFFORDABLE RENTAL HOUSING

While affordable apartments developed under the USDA/Rural Development 515 and Low-Income Housing Tax Credit (LIHTC) programs are not built specifically for farmworkers, farmworkers are not prohibited from occupying units developed under these affordable housing programs. Based on inventories kept by USDA and TDHCA, there are 310 affordable rental housing projects within the four study regions. Between July and October of 2011, Bowen National Research was able to survey 290 of these projects. While many apartment managers and leasing agents would not disclose or did not know the specific number of farmworkers that reside at their properties, based on our surveys, it is evident that some farmworkers choose to inhabit affordable housing units developed under the RD 515 and LIHTC programs, as well as other affordable housing programs. Of the 11,948 combined units at these 290 affordable housing projects, 11,751 are occupied, yielding an overall 97.3% occupancy rate.

Projects identified, inventoried and surveyed operate under a number of affordable housing programs including the Low-Income Housing Tax Credit (LIHTC), HUD Sections 8, 202, and 236, Public Housing, and USDA/Rural Development 515 programs. A variety of data points were collected and tabulated for each project surveyed, including unit mixes, rental rates, vacancies, wait lists, amenities, units sizes (square footage), utility responsibilities, year built and specific program requirements (i.e. resident income limitations).

Data collected during our survey was presented in aggregate format for each region.

The table below summarizes the inventory of all government-financed affordable rental housing options by program type that were identified within the four study regions. When units operate under multiple programs, we have allocated the units within the program that generally serves the lowest income housing segment. For example, units of a mixed Tax Credit and HUD financed project were grouped within the HUD category. This inventory of housing does not include Housing Choice Vouchers. (Note: some farmworker housing developed under USDA/RD is included in the aggregate numbers of the table below.)

	Non-Farmworker-Designated Affordable Rental Housing Inventory 2011											
	Surveyed Units				Not Surveyed Units				Total Units			
Region	TAX	HUD	PH	USDA	TAX	HUD	PH	USDA	TAX	HUD	PH	USDA
Region 1 High Plains	214	383	510	648	0	0	0	0	214	383	510	648
Region 11 South Texas Border	633	425	1,053	686	0	0	391	0	633	425	1,444	686
Region 12 West Texas	183	363	338	130	0	0	0	32	183	363	338	162
Balance of State Region	1,029	1,251	2,539	1,637	245	204	403	37	1,274	1,455	2,938	1,674
Total	2,059	2,422	4,440	3,101	245	204	794	69	2,304	2,626	5,230	3,170

Tax – Tax Credit (both 9% and 4%)
HUD – Department of Housing and Urban Development (HUD Section 8, 202, 236 and 811 Programs)
PH – Public Housing
USDA – United States Department of Agriculture (RD 514, 515, and 516)
Note: Data is limited to only the counties that met the farmworker county designation; Unit counts do not include Housing Choice Vouchers, but do include project based subsidized units.

As the preceding table illustrates, the Balance of the State region contains the largest number of affordable housing units, with a total of 7,341 units. These units represent 55.1% of all affordable housing units identified. Region 12 has the least number of farmworker housing units. Based on this inventory, most of the units in rural Texas operate and were funded under the Public Housing program.

The following summarizes the overall occupancy rates of the affordable projects surveyed.

Region	Occupancy Rate
Region 1 High Plains	97.6%
Region 11 South Texas Border	98.4%
Region 12 West Texas	98.1%
Balance of State Region	98.8%

Source: Bowen National Research
Note: Data is limited to only the counties that met the farmworker county designation

Demand for affordable housing is extremely high in each study region, with no region having less than 97.6% of its supply occupied. As such, there is limited available affordable housing product from which low income households, including farmworkers, can choose.

Based on data reported by the American Community Survey (2005-2009), there are approximately 31,743 manufactured housing home units within the 49 study counties. Of these units, 7,954 (25.0%) were renter-occupied and 23,789 (75.0%) were owner-occupied.

The following is a distribution of manufactured homes by study region:

Region	Manufactured Home Units by Type					
	Renter-Occupied		Owner-Occupied		Total Occupied	
	Number	Percent	Number	Percent	Number	Percent
Region 1 High Plains	1,691	31.2%	3,731	68.8%	5,422	100.0%
Region 11 South Texas Border	1,838	24.8%	5,570	75.2%	7,409	100.0%
Region 12 West Texas	803	29.0%	1,969	71.0%	2,772	100.0%
Balance of State Region	3,622	22.4%	12,519	77.6%	16,141	100.0%

Source: Bowen National Research
Note: Data is limited to only the counties that met the farmworker county designation

The largest number of renter-occupied manufactured homes is 3,622, in the Balance of State Region. Region 1 has the highest share of manufactured homes, at 31.2%.

Bowen National Research conducted a telephone survey of manufactured home communities that contained capacity for 1,350 homes. The following is a distribution of home lots and current occupancy/usage rates.

Region	Manufactured Home Communities Surveyed (Percent Occupied)		
	Total Lots	Vacant	Occupancy Rate
Region 1 High Plains	112	3	97.3%
Region 11 South Texas Border	797	94	88.2%
Region 12 West Texas	401	27	93.3%
Balance of State Region	40	8	80.0%

Source: Bowen National Research
Note: Data is limited to only the counties that met the farmworker county designation

Overall, of the 1,350 home lots included in our survey areas, 1,218 are occupied, yielding a combined occupancy rate of 90.2%. It is significant that only one of the four regions has occupancy rates below 88.2%. Region 1 has the highest occupancy rate of 97.3%.

3. FOR-SALE HOUSING ALTERNATIVES

A total of 2,480 available for-sale housing units were identified within the 49 subject rural farmworker counties falling within the four study areas. The largest share of for-sale housing is in Balance of State Region which contains 1,402 for-sale housing units, or 56.5% of all housing units identified in the study areas. The distribution of for-sale housing by region is summarized in the following table:

	Available For-Sale Housing by Region		
	Units	Percent	Avg. Price
Region 1 High Plains	387	15.6%	$111,343
Region 11 South Texas Border	505	20.3%	$143,380
Region 12 West Texas	185	7.5%	$120,611
Balance of State Region	1,403	56.6%	$116,317
Total	2,480	100.0%	$121,372

Source: Bowen National Research
Note: Data is limited to only the counties that met the farmworker county designation

The overall average price of for-sale housing is $121,372. Region 11 has the highest average price among the study areas at $143,380, while the lowest average price of $111,343 is in Region 1.

The available for-sale housing stock by price point for each of the four regions is summarized as follows:

	Available For-Sale Housing by Price Point							
	Less Than $100k		$100,000-$139,999		$139,999-$199,999		$200,000-$300,000	
	Units	Avg. Price	Units	Avg. Price	Units	Avg. Price	Units	Avg. Price
Region 1 High Plains	208	$66,510	70	$122,247	79	$169,251	30	$244,253
Region 11 South Texas Border	160	$70,576	107	$119,880	133	$167,358	105	$247,896
Region 12 West Texas	91	$61,675	27	$123,048	40	$167,622	27	$247,166
Balance of State Region	705	$63,714	264	$122,541	273	$169,737	161	$245,871
Total	1,164	$64,997	468	$121,918	525	$168,900	323	$246,487

Source: Bowen National Research
Note: Data is limited to only the counties that met the farmworker county designation

Nearly one-half (46.9%) of the housing supply is priced below $100,000. As such, there appears to be a good base of available for-sale product among low-end priced product that may represent a viable option for lower income households. It is likely that much of this product is lower-quality housing that in all likelihood would require some level of repairs. Region 11 appears to have the most balanced supply of product by price point, with 31.7% of product priced below $100,000, 21.1% priced between $100,000 and $139,999, 26.3% priced between $140,000 and $199,999, and the remaining 20.8% priced over $200,000. As such, Region 11 would appear to have the best ability to draw from a wide range of household income levels. Region 12 has the least amount (91 units) of available product priced below $100,000, indicating a limited supply of affordable for-sale housing.

The distribution of available for-sale units by bedroom type, including the average sales price, is illustrated as follows:

	Available For-Sale Housing by Number of Bedrooms									
	One-Bedroom		Two-Bedroom		Three-Bedroom		Four-Bedroom		Five-Bedroom+	
	Units	Avg. Price	Units	Avg. Price	Units	Avg. Price	Units	Avg. Price	Units	Avg. Price
Region 1 High Plains	1	$89,920	49	$75,240	263	$109,659	66	$135,087	8	$182,188
Region 11 South Texas Border	6	$89,674	65	$101,058	318	$138,991	94	$180,807	20	$194,320
Region 12 West Texas	2	$36,245	26	$80,912	121	$121,465	34	$152,844	1	$223,000
Balance of State Region	22	$83,062	221	$66,590	838	$115,561	243	$156,395	66	$159,562
Total	31	$81,543	361	$75,002	1,540	$119,855	437	$158,152	95	$169,453

Source: Bowen National Research
Note: Data is limited to only the counties that met the farmworker county designation

The largest share of available for-sale housing is among three-bedroom units, which represent 33.8% of all for-sale housing units identified in the study areas. Two-bedroom units and four-bedroom units represent nearly equal shares of the overall available for-sale product, representing 8.9% and 9.8% of the available supply, respectively. Overall, the existing supply represents a good balance of product by bedroom type, offering a sufficient supply of product by bedroom type that can accommodate most household sizes.

The age of the available for-sale product by region is summarized in the following table:

	Available For-Sale Housing by Year Built									
	2006 to Present		2001 to 2005		1991 to 2000		1961 to 1990		1960 & Earlier	
	Units	Avg. Price	Units	Avg. Price	Units	Avg. Price	Units	Avg. Price	Units	Avg. Price
Region 1 High Plains	22	$173,041	9	$139,666	14	$110,946	137	$124,353	83	$84,352
Region 11 South Texas Border	87	$173,912	44	$148,609	88	$157,292	158	$135,154	66	$116,048
Region 12 West Texas	13	$167,531	5	$196,479	7	$181,256	65	$134,745	73	$91,319
Balance of State Region	74	$163,639	39	$151,179	67	$138,864	346	$126,935	372	$89,749

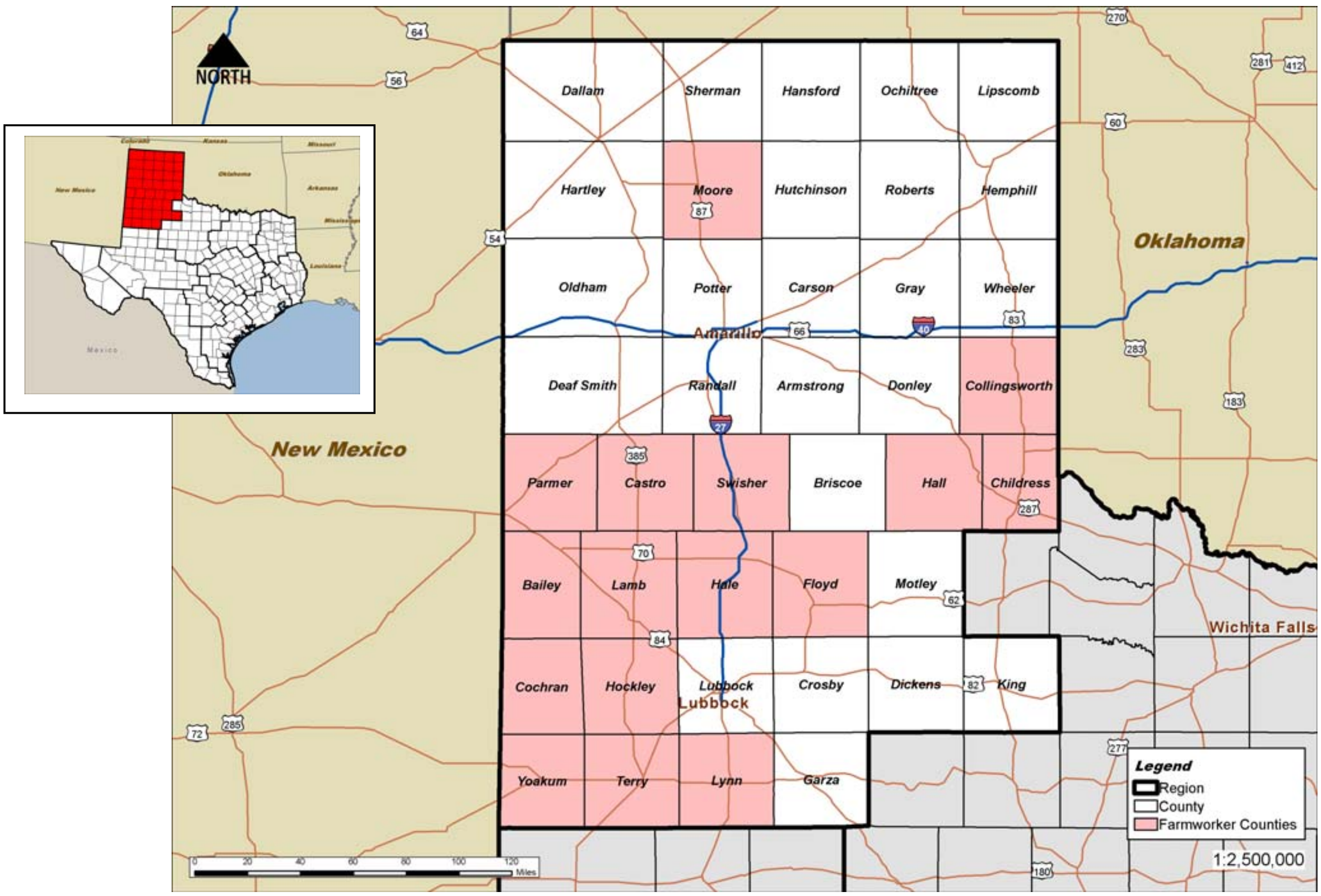
Source: Bowen National Research
Note: Data is limited to only the counties that met the farmworker county designation

Over one-third of the available for-sale housing stock identified in the study regions was built over 50 years ago. This is a large base of old for-sale housing. Of the for-sale housing units identified as available, approximately a fifth was built in the past 20 years. This is a fair base of modern housing. The majority of available for-sale housing was built between 1961 and 1990. As would be expected, the more modern product is generally priced above the older available for-sale product.

B. COUNTY COMPARISON BY REGION

Region 1 (High Plains)

Region 1 is located in the northwestern portion of the state of Texas. This region includes at total of 41 counties, of which 16 were evaluated for rural farmworker housing supply. This region has 329 total farmworker-designated units with a capacity to house 1,376 farmworkers. Hale County has the most farmworker-designated units, with 278 within four projects. Other affordable housing options identified in this region include 1,755 state or federally assisted apartment units and 208 available for-sale housing units priced under $100,000. A map of the counties studied in the region follows:



Bowen National Research

1. FARMWORKER-DESIGNATED RENTAL HOUSING

This region contains 15 licensed migrant labor housing facilities, of which three are also operate under the USDA/RD 514 & 516 program. Two additional farmworker rental properties were developed under the USDA/RD 514 and 516 programs. Overall, these facilities have a combined 329 total units with a capacity to house 1,356 farmworkers.

Facility Name and Address	County	Housing Type	Total Buildings	Total Units	Capacity (Persons)
Tumbleweed Apts. Phase I and II 301 East 6th, Muleshoe, TX 79347	Bailey	USDA 514/516	N/A	72	236
Azteca Economic Apartments 910 E. Jones Street, Dimmit, TX 79027	Castro	USDA 514/516	N/A	32	192
Morton Meadows** 907 B 4th, Morton, TX 79346	Cochran	Licensed Migrant & USDA 514/516	N/A	51	270
City Gin, Inc. East Service Rd., I-27 South, Abernathy, TX 79311	Hale	Licensed Migrant	1	4	16
Date Street Housing * 1601 N. Date Plainview, TX 79072	Hale	Licensed Migrant	N/A	20	128
Petersburg Coop Gin 1911 Ave. D, Petersburg, TX 79250	Hale	Licensed Migrant	13	13	52
Tune-Mayfield Camp CR145, 1 1/2 Mile East Of Mayfield, Hale Center, TX 79041	Hale	Licensed Migrant	6	20	90
Busters Gin Ltd 4165 Quail Road, Ropesville, TX 79358	Hockley	Licensed Migrant	3	10	36
Plains East Apts.** 300-400 Maurer Street, Anton, TX 79313	Hockley	Licensed Migrant & USDA 514/516	N/A	28	40
United Cotton Growers 3969 East St. Road 1585, Levelland, TX 79336	Hockley	Licensed Migrant	2	6	12
Farmers Coop Sudan 222 North Main St., Sudan, TX 79371	Lamb	Licensed Migrant	1	1	4
Springlake-Earth Cotton Growers 106 S. Highway 385, Springlake, TX 79082	Lamb	Licensed Migrant	7	8	44
Windmill Village Apts. 922 MLK Blvd, Littlefield, TX 79339	Lamb	Licensed Migrant & USDA 514/516	N/A	24	76
Farmers Coop Association Of O'Donnell 1301 South Loop 76, O'Donnell, TX 79351	Lynn	Licensed Migrant	3	20	80
New Home Coop Gin 298 FM 211, Meadow, TX 79345	Lynn	Licensed Migrant	2	9	20
Wells Farmers Cooperative Gin 990 FM 213, O'Donnell, TX 79351	Lynn	Licensed Migrant	3	10	20
Cantus Barricks 12th & Avenue B, Plains, TX 79355	Yoakum	Licensed Migrant	1	1	40
		Total	**42**	**329**	**1,356**

USDA – U.S. Department of Agriculture
N/A – Not Available
Capacity (persons) is based on 2 people per bedroom
* According to property survey of the 156 total units, 20 units are set-aside for farmworkers
** Waiver for this project allows rental to non-farmworkers

These facilities range in capacity from 4 persons to 270 persons. The largest facility is Morton Meadows, located in Morton, in Cochran County, which has the capacity for 270 workers. Most of the facilities are located within southwest portion of the region, primarily west of the city of Lubbock. Of the 12 farmworker projects in this region we were able to survey, overall occupancy is reported at 100.0% among USDA/RD 514 & 516 properties and 29.7% among licensed migrant labor housing. Vacancies are reportedly low due to the temporary lack of need for workers at farms suffering as a result of the 2011 drought. Typically, the licensed migrant labor housing operates at occupancy levels above 90%.

2. NON-FARMWORKER AFFORDABLE RENTAL HOUSING

Based on inventories kept by USDA and TDHCA, there are 1,755 affordable rental housing units within this region. Bowen National Research was able to survey all of these units. While many apartment managers and leasing agents would not disclose or did not know the specific number of farmworkers that reside at their properties, based on our surveys, it is evident that some farmworkers choose to inhabit affordable housing units developed under the USDA/RD 515 and LIHTC programs. Of the 1,755 combined units at the affordable housing projects, 1,713 are occupied, yielding an overall 97.6% occupancy rate. This is considered a high occupancy rate and a good indication of the demand for affordable housing.

The following table summarizes the inventory of all affordable rental housing options by program type that identified within the region. (Note: some farmworker housing developed with USDA financing is included in the aggregate numbers of the table below.)

Non-Farmworker-Designated Affordable Rental Housing Inventory 2011											
Surveyed Units				Not Surveyed Units				Total Units			
TAX	HUD	PH	USDA	TAX	HUD	PH	USDA	TAX	HUD	PH	USDA
214	383	510	648	0	0	0	0	214	383	510	648

Tax – Tax Credit (both 9% and 4%)
HUD – Department of Housing and Urban Development (HUD Section 8, 202, 236 and 811 Programs)
PH – Public Housing
USDA – United States Department of Agriculture (RD 514, 515, and 516)
Note: Data is limited to only the counties that met the farmworker county designation; Unit counts do not include Housing Choice Vouchers, but do include project based subsidized units.

As the preceding table illustrates, the largest number of affordable housing units within the region are funded through the USDA/Rural Development program, which currently has 648 units in the region. These units represent 36.9% of all affordable housing units identified.

Based on American Community Survey data, there are 1,691 manufactured home rental units in this region. Bowen National Research's survey of manufactured home communities indicated an overall occupancy rate of 97.3%, a very high occupancy rate.

3. FOR-SALE HOUSING ALTERNATIVES

Considering the rural nature of many of the counties in the study regions, multifamily and other rental housing options are often limited and the one of the only other housing options available is homeownership.

While most farmworkers have relatively low incomes, there are programs available that prospective homebuyers with low incomes can access to purchase a home. The USDA Homeownership Direct Loan Program (Section 502) offers mortgages and loan guarantees for low-income homebuyers in rural areas. At least 40% of the program's funds appropriated each year must be used to assist families with incomes below 50% of Area Median Household Income (AMHI). TDHCA also offers first-time homebuyer assistance to low-income households (households with incomes between 30% and 115% of AMHI). Both of these programs make home buying for low-income households a viable option.

Bowen National Research identified for-sale housing priced at $300,000 and lower within each county and region in the four study areas. While it is highly unlikely that farmworker households would be able to purchase any of the higher priced homes identified in during our research, we provided such data to demonstrate the broader spectrum of for-sale housing. The available for-sale housing stock by price point for region 1 is summarized as follows:

Available For-Sale Housing by Price Point							
Less Than $100k		$100,000-$139,999		$139,999-$199,999		$200,000-$300,000	
Units	Avg. Price	Units	Avg. Price	Units	Avg. Price	Units	Avg. Price
208	$66,510	70	$122,247	79	$169,251	30	$244,253

The available for-sale housing product in the region primarily consists of product priced below $100,000, which would most likely appear to farmworkers, who typically have incomes below $30,000.

Based on Bowen National Research's research, the average asking price for for-sale housing in this region is $111,343. At an estimated interest rate of 5.0% and a 30-year term (and 95% LTV), the monthly mortgage for a $111,343 for-sale housing unit is $710, including estimated taxes and insurance.

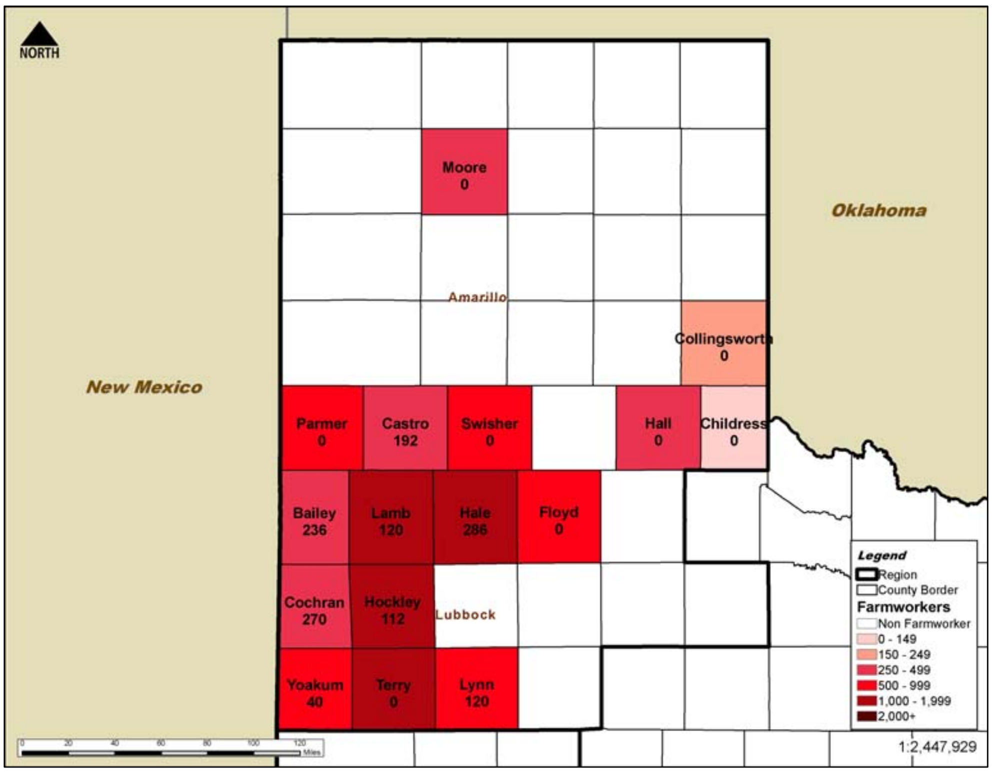
For-Sale Housing Analysis	
Region's Average Home Price – Bowen National Research	$111,343
Mortgaged Value = 95% Of Average Home Price	$105,776
Interest Rate – Bankrate.Com – 5.0%	5.0%
Term – 30 Years	30
Monthly Principal & Interest	$568
Estimated Taxes And Insurance*	$142
Estimated Monthly Mortgage Payment:	$710

* Estimated at 25% of principal and interest.

The estimated typical mortgage for a home in the region is approximately $710 per month. Based on our research, most farmworkers have incomes below $30,000 a year. Assuming a housing cost to income ratio of 30% (people paying over 30% of their income towards housing are considered "cost-burdened"), most farmworker households could pay no more than $750 per month in housing expenditures. When utility costs are considered (estimated to be approximately $100 per month), most farmworker households can likely pay no more than $650 per month towards that actual house. As such, it appears that there is a good base of for-sale housing that would be affordable to some farmworkers in the region and that home buying is a viable option for farmworkers, assuming they meet credit and other financial qualifying requirements.

4. HOUSING LOCATIONS VS. AGRICULTURAL EMPLOYMENT CENTERS

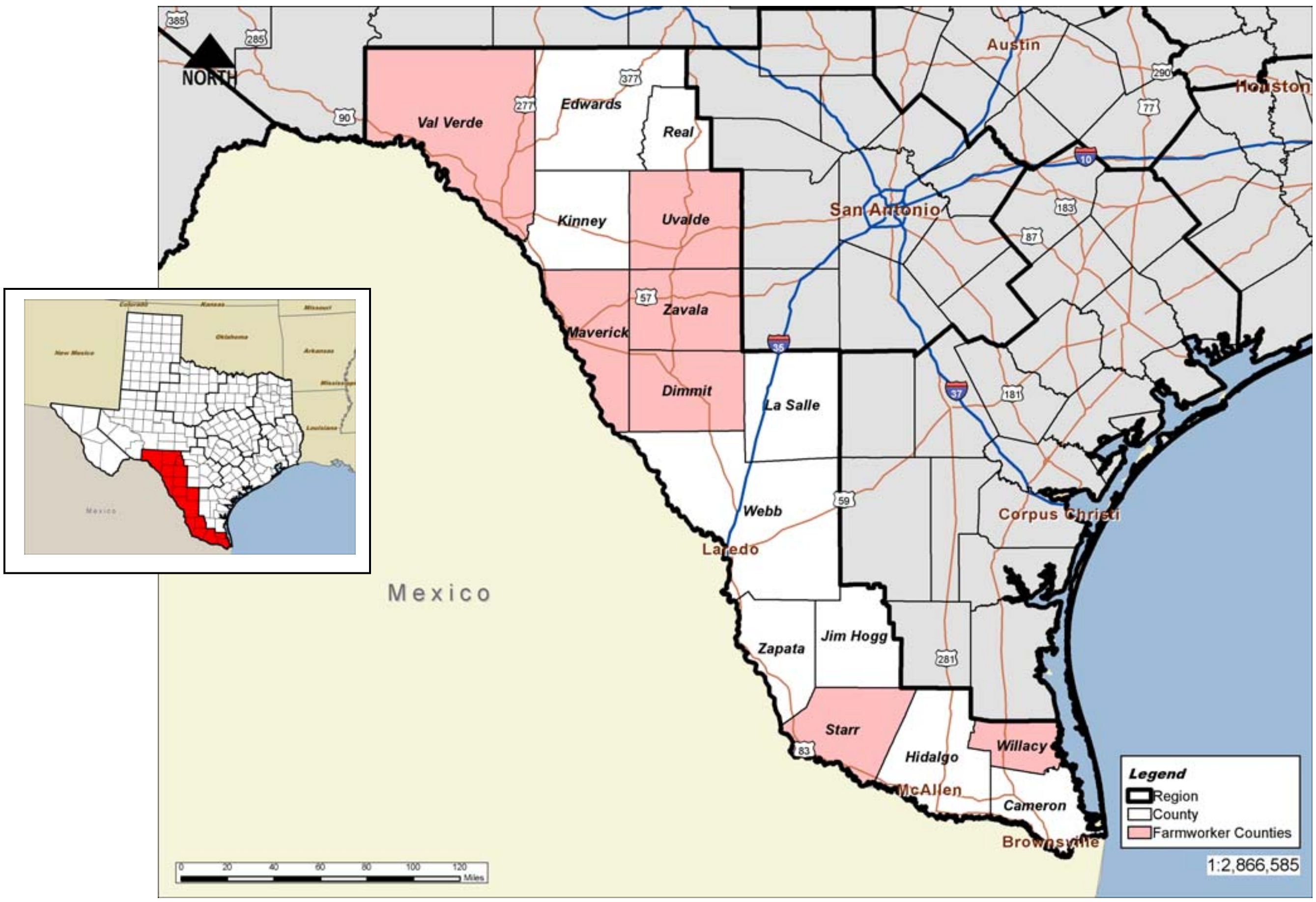
Most of the farmworker facilities are located in rural counties west of the city of Lubbock, with some facilities also located in the Hale County to the north of Lubbock and in Lynn County to the south. Concentrations of agricultural-related work centers are generally highest in the counties located in the southwest portion of the region. The following map compares the farmworker-designated housing capacity for each study county with the farmworker concentrations of that county (note: the map's shading represents the estimated farmworkers per county while the numbers shown under each county name indicate the farmworker-designated housing capacity).



Based on the preceding map, Terry County is among the four counties in the region that have the highest concentration of farmworkers (denoted in dark red), yet does not farmworker-designated housing. Other counties in the region that do not offer farmworker-designated housing but have high concentrations of farmworkers include Parmer, Swisher and Floyd Counties. These counties should be considered as possible areas that may need additional farmworker-designated housing and should be evaluated further.

Region 11 (South Texas Border)

Region 11 is located in the far southern portion of the state of Texas. This region includes at total of 16 counties, of which seven were evaluated for rural farmworker demographics. This region has 177 total farmworker-designated units with a capacity to house 984 farmworkers. There are only four farmworker-designated facilities within the counties studied in this region. Other affordable housing options identified in this region include 3,188 state or federally assisted apartment units and 160 available for-sale housing units priced under $100,000. A map of the counties studied in the region follows:



Bowen National Research

1. FARMWORKER-DESGNATED RENTAL HOUSING

This region contains four farmworker rental properties developed under the USDA/RD 514 and 516 programs. There are no licensed migrant labor housing facilities in this region. The four farmworker projects developed under the USDA/RD 514 & 516 programs contain 177 units with a capacity to house 984 farmworkers.

Facility Name and Address	County	Housing Type	Total Buildings	Total Units	Capacity (Persons)
Enrique Montalva 2095 Main Street, Eagle Pass, TX 78853	Maverick	USDA 514/516	N/A	60	352
Villas de Val Verde 1275 FM 2523, Del Rio, TX 78540	Val Verde	USDA 514/516	N/A	42	296
Willacy County Housing Authority 4024 Expressway 77, Raymondsville, TX 78580	Willacy	USDA 514/516	N/A	49	196
Crystal City Farm Labor Housing 417 N 11th, Crystal City, TX 78839	Zavala	USDA 514/516	N/A	26	140
		Total	**N/A**	**177**	**984**

Capacity (persons) is based on 2 people per bedroom
N/A – Not Available
USDA – U.S. Department of Agriculture

These facilities range in capacity from 140 persons to 352 persons. The largest facility is Enrique Montalva, located in Eagle Pass, in Maverick County. Three of the four facilities are located in the northern half of the region, near the Texas-Mexico border. All three of these counties are in very rural areas and are not within proximity to any large cities or metropolitan areas. The Willacy County Housing Authority project is located in Willacy County, one of the southern-most counties in the state. The nearest large cities to this project are McAllen and Brownsville, located in the counties southwest and south of Willacy County. We were able to survey all of the farmlabor housing in this region, and yielded an occupancy rate of 88.7%.

2. NON-FARMWORKER AFFORDABLE RENTAL HOUSING

Based on inventories kept by USDA and TDHCA, there are 3,188 affordable rental housing units within this region. Bowen National Research was able to survey 2,797 (87.7%) of these units. While many apartment managers and leasing agents would not disclose or did not know the specific number of farmworkers that reside at their properties, based on our surveys, it is evident that there are some farmworkers that choose to inhabit affordable housing units developed under the RD 515 and LIHTC programs. Of the 2,797 surveyed units at these affordable projects, 2,752 are occupied, yielding an overall 98.4% occupancy rate. Demand for non-farmworker-designated housing is extremely high, leaving limited available units for low-income households, including farmworkers.

The following table summarizes the inventory of all affordable rental housing options by program type that were identified within the region. (Note: some farmworker housing developed under USDA is included in the aggregate numbers of the table below.)

Non-Farmworker-Designated Affordable Rental Housing Inventory 2011											
Surveyed Units				Not Surveyed Units				Total Units			
TAX	HUD	PH	USDA	TAX	HUD	PH	USDA	TAX	HUD	PH	USDA
633	425	1,053	686	0	0	391	0	633	425	1,444	686

Tax – Tax Credit (both 9% and 4%)
HUD – Department of Housing and Urban Development (HUD Section 8, 202, 236 and 811 Programs)
PH – Public Housing
USDA – United States Department of Agriculture (RD 514, 515, and 516)
Note: Data is limited to only the counties that met the farmworker county designation; Unit counts do not include Housing Choice Vouchers, but do include project based subsidized units.

As the preceding table illustrates, the largest number of affordable housing units within the region are funded through the Public Housing program, which currently has 1,444 units in the region. These units represent 45.3% of all affordable housing units identified in this region.

According to the American Community Survey, there are 1,838 manufactured home rental units within the study region. Based on the Bowen National Research survey, manufactured homes communities are 88.2% occupied; this a typical occupancy rate for such communities.

3. <u>FOR-SALE HOUSING ALTERNATIVES</u>

Considering the rural nature of many of the counties in the study regions, multifamily and other rental housing options are often limited and the one of the only other housing options available is homeownership.

As stated earlier, the USDA Direct Loan program and TDHCA's first-time homebuyer program make home buying for low-income households a viable option.

Bowen National Research identified for-sale housing priced at $300,000 and lower within each county and region in the four study areas. The available for-sale housing stock by price point for region 11 is summarized as follows:

Available For-Sale Housing by Price Point							
Less Than $100k		$100,000-$139,999		$139,999-$199,999		$200,000-$300,000	
Units	Avg. Price	Units	Avg. Price	Units	Avg. Price	Units	Avg. Price
160	$70,576	107	$119,880	133	$167,358	105	$247,896

Though most of the available for-sale housing product in the region is priced below $100,000, the region has a good balance of product by price point. The 160 available units priced below $100,000 represent a good base of supply from which very low income households (including farmworkers) can choose.

Based on Bowen National Research's research, the average asking price for for-sale housing in this region is $143,379. At an estimated interest rate of 5.0% and a 30-year term (and 95% LTV), the monthly mortgage for a $143,379 for-sale housing unit is $914, including estimated taxes and insurance.

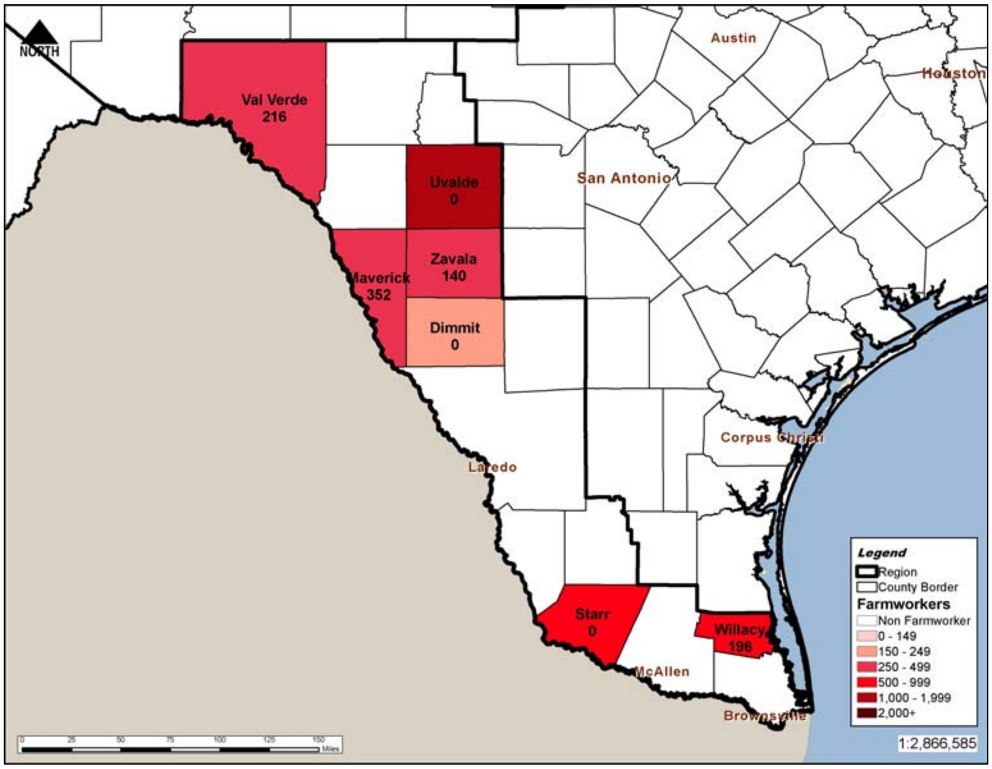
For-Sale Housing Analysis	
Region's Average Home Price – Bowen National Research	$143,379
Mortgaged Value = 95% Of Average Home Price	$136,210
Interest Rate – Bankrate.Com – 5.0%	5.0%
Term – 30 Years	30
Monthly Principal & Interest	$731
Estimated Taxes And Insurance*	$183
Estimated Monthly Mortgage Payment:	$914

* Estimated at 25% of principal and interest.

The estimated typical mortgage for a home in the region is approximately $914 per month. Based on our research, most farmworkers have incomes below $30,000 a year. Assuming a housing cost to income ratio of 30% (people paying over 30% of their income towards housing are considered "cost-burdened"), most farmworker households could pay no more than $750 per month in housing expenditures. When utility costs are considered (estimated to be approximately $100 per month), most farmworker households can likely pay no more than $650 per month towards that actual house. While the average priced home in this region is well beyond the affordability for most farmworkers, the region has at least 160 available for-sale housing units priced below $100,000. Homes priced at or below this level would yield a mortgage payment that would be affordable to some lower income farmworkers. As a result, it appears that there is a sufficient base of for-sale housing that would be affordable to some farmworkers in the region and that home buying is a viable option for farmworkers, assuming they meet credit and other financial qualifying requirements.

4. HOUSING LOCATIONS VS. AGRICULTURAL EMPLOYMENT CENTERS

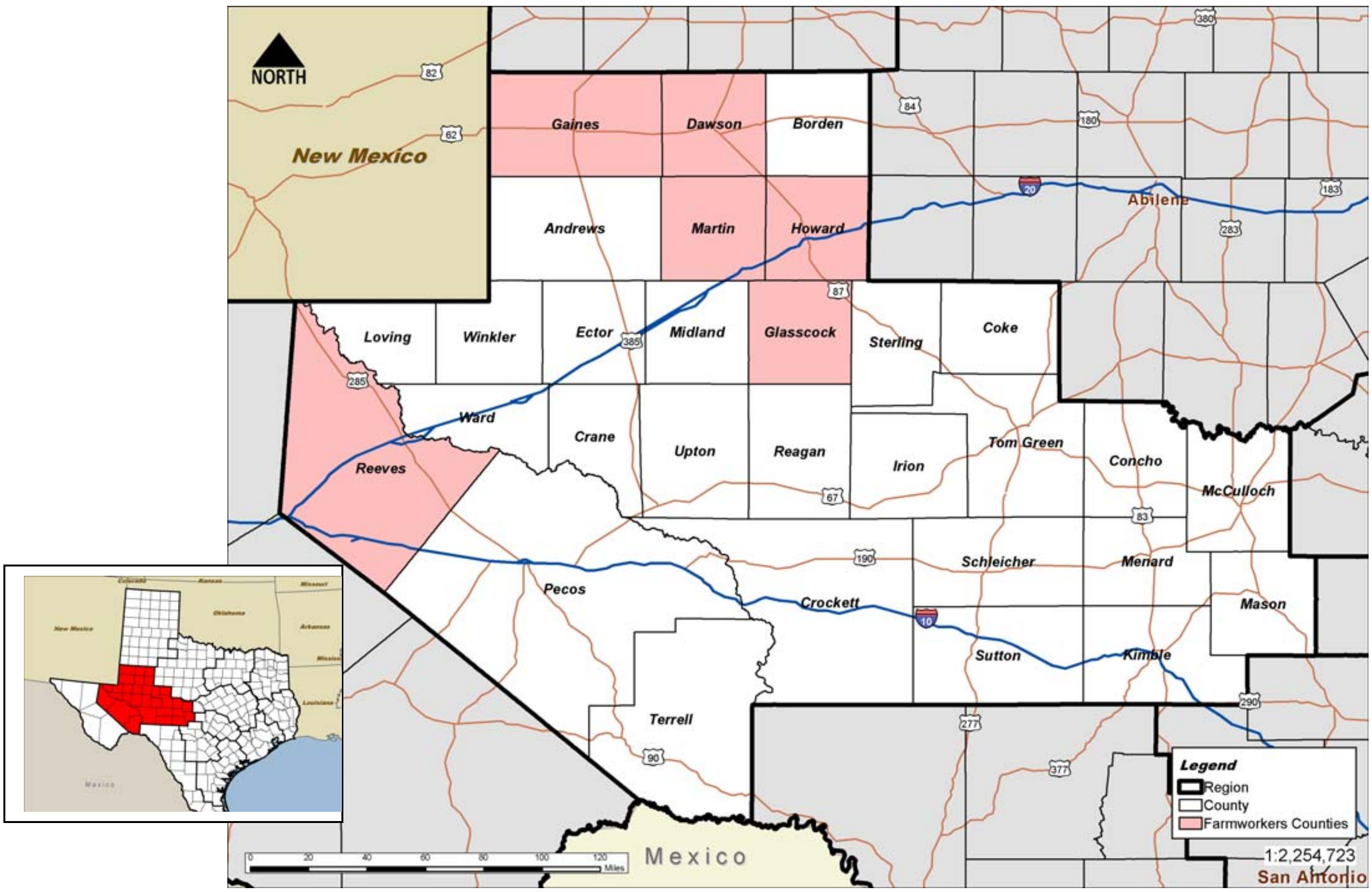
Most of the farmworker facilities are located in rural counties in the northern portion of the region and are not near any major cities or metropolitan areas. Only the project located in the far southern portion of the region, in Willacy County, is located near larger cities, such as McAllen and Brownsville. Concentrations of agricultural-related work centers are generally highest in the counties located in the west-northwest portions of the region, in areas closest to the Texas-Mexico border. The following map compares the farmworker-designated housing capacity for each study county with the farmworker concentrations of that county (note: the map's shading represents the estimated farmworkers per county while the numbers shown under each county name indicate the farmworker-designated housing capacity).



As the preceding map illustrates, Uvalde has the highest concentration of farmworkers (shown in dark red) of the counties we studied in this region yet has no farmworker-designated housing. Starr County also has a notable concentration of farmworkers yet does not have any farmworker-designated housing. These counties should be considered as possible areas that may require farmworker-designated housing.

Region 12 (West Texas)

Region 12 is located in the western portion of the state of Texas. This region includes at total of 30 counties, of which 6 were classified as rural farmworker counties that were included in the following analysis. This region has 46 total farmworker-designated units with a capacity to house 197 farmworkers, the second lowest capacity of the four study regions. Dawson and Gaines Counties have the most farmworker-designated units, with 68 units each. Other affordable housing options identified in this region include 1,046 state or federally assisted apartment units and 91 available for-sale housing units priced under $100,000. A map of the counties studied in the region follows:



1. FARMWORKER-DESIGNATED RENTAL HOUSING

This region contains seven licensed migrant labor housing facilities, but no farmworker rental properties developed under the USDA/RD 514 and 516 programs. These facilities have a combined 46 total units with a capacity to house 197 farmworkers.

Facility Name and Address	County	Housing Type	Total Buildings	Total Units	Capacity (Persons)
Adcock Gin Co 210 S. Akron, Lamesa, TX 79331	Dawson	Licensed Migrant	1	1	8
Welch Gin Inc Corner Of Highway 83 & Fm 829, Welch, TX 79377	Dawson	Licensed Migrant	4	8	32
Tricounty Producers Coop Labor Camp 1521 Tate, Loop, TX 79342	Gaines	Licensed Migrant	1	12	28
Z. Zamarano 698 CR 208, Seminole, TX 79365	Gaines	Licensed Migrant	1	1	40
Glasscock County Coop #1 300 C R Coop, Garden City, TX 79739	Glasscock	Licensed Migrant	3	11	41
Glasscock County Coop #2 19912 North State Hwy 137, Garden City 79739	Glasscock	Licensed Migrant	1	6	20
Flowers Grove Coop Gin 4003 East Fm 2002, Ackerly, TX 79713	Martin	Licensed Migrant	2	7	28
		Total	**13**	**46**	**197**

These facilities range in capacity from 8 persons to 41 persons. The largest facility is Glasscock County Coop #1, located in Garden City, in Glasscock County. The seven facilities are located in only four counties, two each in Dawson, Gaines and Glasscock Counties. Most of the facilities are located within the far northern portion of the region, generally north of the cities of Odessa and Midland. It is of note that this portion of the region abuts the southern portion of Region 1, which contains the greatest concentration of farmworker housing in that particular region. We were only able to survey three of the seven licensed migrant labor housing in this region. Two of the properties report that they will have no migrant workers this season due to the 2011 drought, while Welch Gin Inc., in Welch, reports a low occupancy of 40.6%.

2. NON-FARMWORKER AFFORDABLE RENTAL HOUSING

Based on inventories kept by USDA and TDHCA, there are 1,046 affordable rental housing units within this region. Bowen National Research was able to survey 1,014 (97.0%) of these units. While many apartment managers and leasing agents would not disclose or did not know the specific number of farmworkers that reside at their properties, based on our surveys, it is evident that some farmworkers choose to inhabit affordable housing units developed under the RD 515 and LIHTC programs. Of the 1,014 combined units at the surveyed affordable housing projects, 995 are occupied, yielding an overall 98.1% occupancy rate.

The following table summarizes the inventory of all affordable rental housing options by program type that identified within the region.

Non-Farmworker-Designated Affordable Rental Housing Inventory 2011											
Surveyed Units				Not Surveyed Units				Total Units			
TAX	HUD	PH	USDA	TAX	HUD	PH	USDA	TAX	HUD	PH	USDA
183	363	338	130	0	0	0	32	183	363	338	162

Tax – Tax Credit (both 9% and 4%)
HUD – Department of Housing and Urban Development (HUD Section 8, 202, 236 and 811 Programs)
PH – Public Housing
USDA – United States Department of Agriculture (RD 514, 515, and 516)
Note: Data is limited to only the counties that met the farmworker county designation; Unit counts do not include Housing Choice Vouchers, but do include project based subsidized units.

As the preceding table illustrates, the largest number of affordable housing units within the region are funded through various HUD programs, which currently have 363 units in the region. These units represent 34.7% of all affordable housing units identified.

According to the American Community Survey, there are 803 manufactured home rental units in the region. Based on the Bowen National Research survey, the occupancy rate of manufactured home communities is 93.3%, a high occupancy rate for such communities.

3. FOR-SALE HOUSING ALTERNATIVES

Considering the rural nature of many of the counties in the study regions, multifamily and other rental housing options are often limited and the one of the only other housing options available is homeownership.

As stated earlier, the USDA Direct Loan program and TDHCA's first-time homebuyer program make home buying a viable housing alternative for low-income farmworkers, assuming they meet eligibility requirements.

Bowen National Research identified for-sale housing priced at $300,000 and lower within each county and region in the four study areas. The available for-sale housing stock by price point for region 12 is summarized as follows:

Available For-Sale Housing by Price Point							
Less Than $100k		$100,000-$139,999		$139,999-$199,999		$200,000-$300,000	
Units	Avg. Price	Units	Avg. Price	Units	Avg. Price	Units	Avg. Price
91	$61,675	27	$123,048	40	$167,622	27	$247,166

Almost one-half (49.2%) of all available for-sale housing identified in the region is priced below $100,000. However, there are only 91 of these lower priced units, providing a limited supply of affordable for-sale housing.

Based on Bowen National Research's research, the average asking price for for-sale housing in this region is $120,611. At an estimated interest rate of 5.0% and a 30-year term (and 95% LTV), the monthly mortgage for a $120,611 for-sale housing unit is $769, including estimated taxes and insurance.

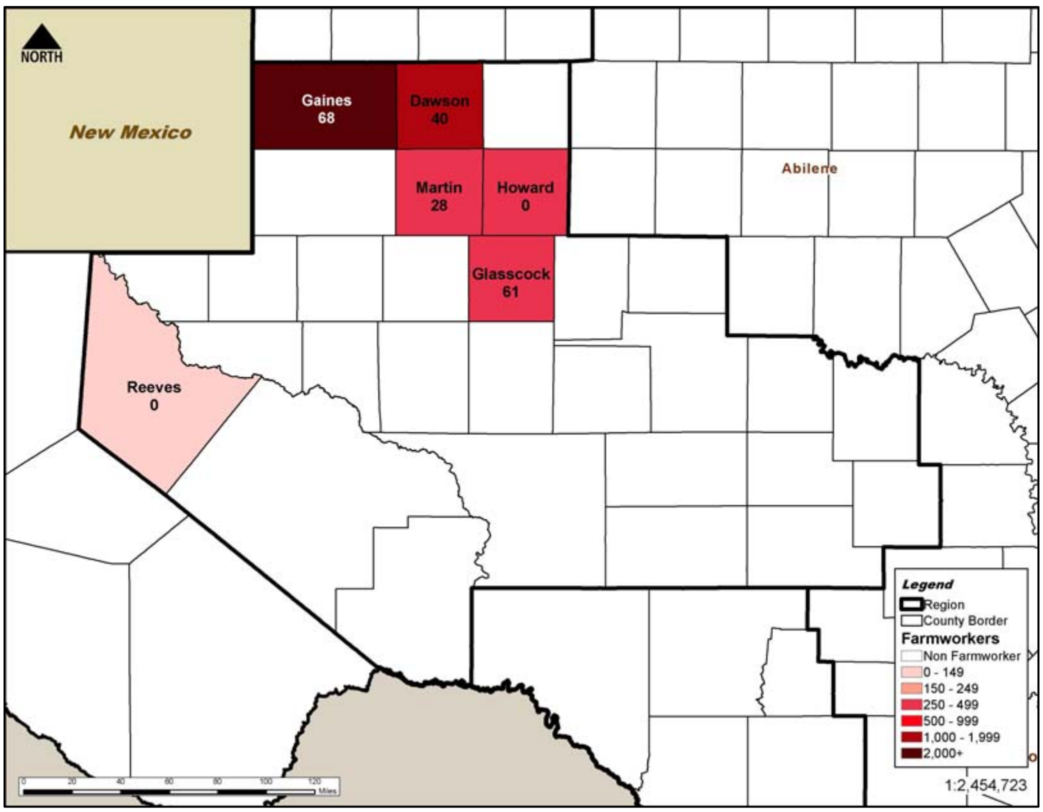
For-Sale Housing Analysis	
Region's Average Home Price – Bowen National Research	$120,611
Mortgaged Value = 95% Of Average Home Price	$114,580
Interest Rate – Bankrate.Com – 5.0%	5.0%
Term – 30 Years	30
Monthly Principal & Interest	$615
Estimated Taxes And Insurance*	$154
Estimated Monthly Mortgage Payment:	$769

* Estimated at 25% of principal and interest.

The estimated typical mortgage for a home in the region is approximately $769 per month. Based on our research, most farmworkers have incomes below $30,000 a year. Assuming a housing cost to income ratio of 30% (people paying over 30% of their income towards housing are considered "cost-burdened"), most farmworker households could pay no more than $750 per month in housing expenditures. When utility costs are considered (estimated to be approximately $100 per month), most farmworker households can likely pay no more than $650 per month towards that actual house. While the average priced home in this region could be affordability for most farmworkers, the region has only 91 available for-sale housing units priced below $100,000. Homes priced at or below this level would yield a mortgage payment that would be more affordable to some lower income farmworkers. Given that there are only 91 of these lower priced for-sale housing alternatives, it appears that there is a limited base of for-sale housing that would be affordable to farmworkers in the region and that home buying is a limited option for farmworkers, assuming they meet credit and other financial qualifying requirements.

4. HOUSING LOCATIONS VS. AGRICULTURAL EMPLOYMENT CENTERS

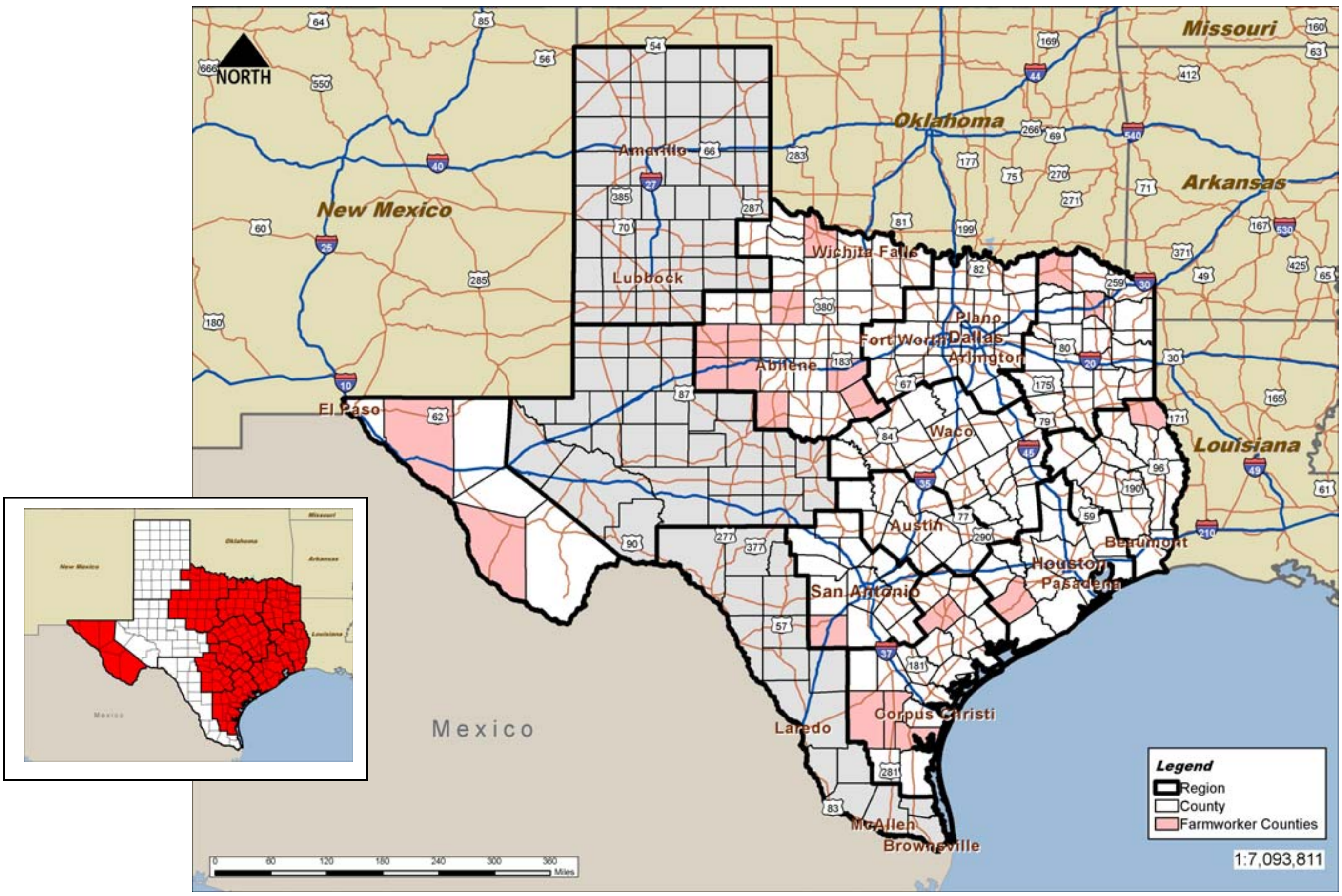
Most of the farmworker facilities are located in rural counties in the far northwest portion of the region, generally north of Midland and Odessa. The following map compares the farmworker-designated housing capacity for each study county with the farmworker concentrations of that county (note: the map's shading represents the estimated farmworkers per county while the numbers shown under each county name indicate the farmworker-designated housing capacity).



As the preceding table illustrates, Gaines County has more than 2,000 estimated farmworkers living within the county, yet there is only capacity for 68 workers in farmworker-designated housing. None of the other counties we studied in this region have a housing capacity to house more than 61 workers, yet most have high concentrations of farmworkers. It is notable that Howard County does not have any farmworker-designated housing yet has a high concentration of farmworkers.

Balance of State Region

The balance of farmworker counties that did not fall in regions 1, 11 or 12, but that met the definition of rural farmworker counties for the purposes of this analysis were grouped and evaluated as the Balance of State Region. There are 20 counties that fall within the Balance of State Region, which comprises the largest number of counties among the four study regions. Interestingly, despite the size of this region, there are no migrant labor housing facilities or USDA/RD 514 & 516 farmworker facilities within any of the 20 selected counties in this region. The region, however, offers other affordable housing options including 7,045 state or federally assisted apartment units and 705 available for-sale housing units priced under $100,000. A map of the counties studied in the region follows:



1. **FARMWORKER-DESIGNATED RENTAL HOUSING**

The selected counties within this region contain no licensed migrant labor housing facilities and no farmworker rental properties developed under the USDA/RD 514 and 516 programs.

2. **NON-FARMWORKER AFFORDABLE RENTAL HOUSING**

Based on inventories kept by USDA and TDHCA, there are 7,341 affordable rental housing units within this region. Bowen National Research was able to survey 6,456 of these units. While many apartment managers and leasing agents would not disclose or did not know the specific number of farmworkers that reside at their properties, based on our surveys, it is evident that some farmworkers choose to inhabit affordable housing units developed under the RD 515 and LIHTC programs. Of the 6,345 combined surveyed units at these affordable housing projects, 6,270 are occupied, yielding an overall 98.8% occupancy rate.

The following table summarizes the inventory of all affordable rental housing options by program type that identified within the region.

Non-Farmworker-Designated Affordable Rental Housing Inventory 2011											
Surveyed Units				Not Surveyed Units				Total Units			
TAX	HUD	PH	USDA	TAX	HUD	PH	USDA	TAX	HUD	PH	USDA
1,029	1,251	2,539	1,637	245	204	403	37	1,274	1,455	2,938	1,674

Tax – Tax Credit (both 9% and 4%)
HUD – Department of Housing and Urban Development (HUD Section 8, 202, 236 and 811 Programs)
PH – Public Housing
USDA – United States Department of Agriculture (RD 514, 515, and 516)
Note: Data is limited to only the counties that met the farmworker county designation; Unit counts do not include Housing Choice Vouchers, but do include project based subsidized units.

As the preceding table illustrates, the largest number of affordable housing units within the region are funded through the Public Housing program, which currently has 2,938 units in the region. These units represent 40.0% of all affordable housing units identified.

According to the American Community Survey, there are 3,622 manufactured home rental units in the region. Based on Bowen National Research's survey of manufactured home communities, this region has an occupancy rate of 80.0%, the lowest among the four study regions.

3. FOR-SALE HOUSING ALTERNATIVES

Considering the rural nature of many of the counties in the study regions, multifamily and other rental housing options are often limited and the one of the only other housing options available is homeownership.

The USDA Homeownership Direct Loan program and TDHCA's first-time homebuyer program make home buying for low-income households a viable option.

Bowen National Research identified for-sale housing priced at $300,000 and lower within each county and region in the four study areas. The available for-sale housing stock by price point for the Balance of State Region is summarized as follows:

Available For-Sale Housing by Price Point							
Less Than $100k		$100,000-$139,999		$139,999-$199,999		$200,000-$300,000	
Units	Avg. Price	Units	Avg. Price	Units	Avg. Price	Units	Avg. Price
705	$63,714	264	$122,541	273	$169,737	161	$245,871

Of the 1,403 available for-sale housing units in the region, slightly more than half of the units are priced below $100,000. Much of this product will be affordable to lower-income farmworkers making less than $30,000.

Based on Bowen National Research's research, the average asking price for for-sale housing in this region is $116,217. At an estimated interest rate of 5.0% and a 30-year term (and 95% LTV), the monthly mortgage for a $116,217 for-sale housing unit is $741, including estimated taxes and insurance.

For-Sale Housing Analysis	
Region's Average Home Price – ESRI	$116,217
Mortgaged Value = 95% Of Average Home Price	$110,406
Interest Rate – Bankrate.Com – 5.0%	5.0%
Term – 30 Years	30
Monthly Principal & Interest	$593
Estimated Taxes And Insurance*	$148
Estimated Monthly Mortgage Payment:	$741

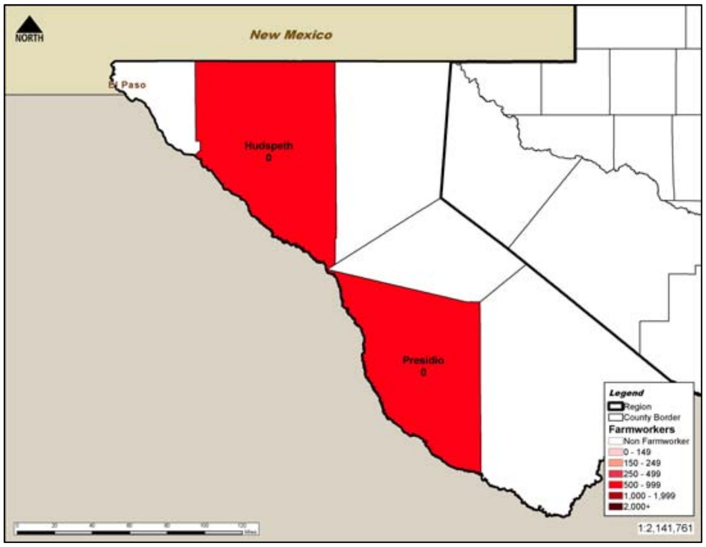
* Estimated at 25% of principal and interest.

The estimated typical mortgage for a home in the region is approximately $741 per month. Based on our research, most farmworkers have incomes below $30,000 a year. Assuming a housing cost to income ratio of 30% (people paying over 30% of their income towards housing are considered "cost-burdened"), most farmworker households could pay no more than $750 per month in housing expenditures. When utility costs are considered (estimated to be approximately $100 per month), most farmworker households can likely pay no more than $641 per month towards that actual house. The average priced home in this region is potentially affordable for some farmworkers. More importantly, the region has approximately 705 available for-sale housing units priced below $100,000. Homes priced at or below this level would yield a mortgage payment that would be affordable to some lower income farmworkers. As a result, it appears that there is a large base of for-sale housing that would be affordable to some farmworkers in the region and that home buying is a viable option for farmworkers, assuming they meet credit and other financial qualifying requirements.

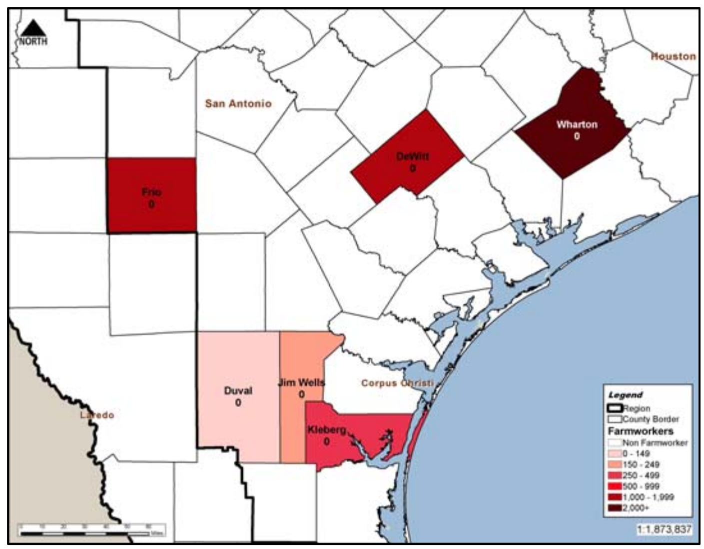
4. HOUSING LOCATIONS VS. AGRICULTURAL EMPLOYMENT CENTERS

There are no farmworker-designated housing facilities within the 20 counties that fall within this region. As a result, farmworkers must rely on other housing alternatives, such as state or federally assisted rental property, low-end market rate housing, non-conventional rental (trailers, RVs, tents, etc) and low-end for-sale housing alternatives. Agricultural-related work centers are generally spread throughout the region. The following maps compare the farmworker-designated housing capacity (there is no farmworker-designated housing in the region's study counties) for each study county with the farmworker concentrations of that county.

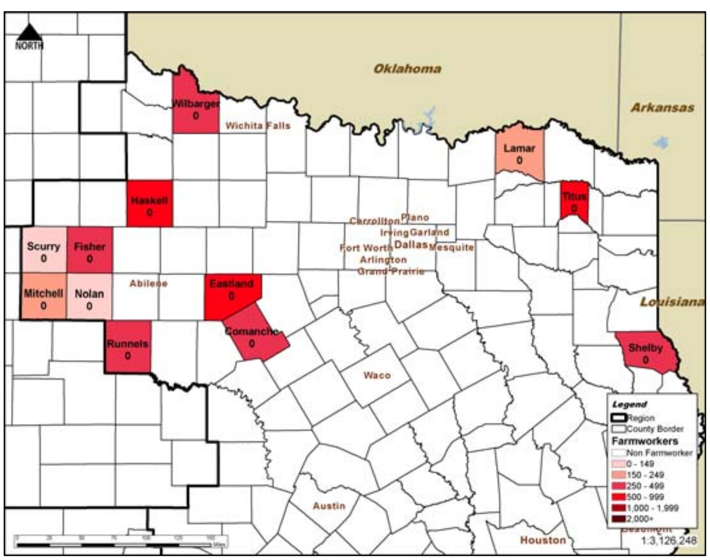
As shown on the maps on the following pages, the counties of Wharton, DeWitt and Frio all have high concentrations of farmworkers yet do not have any farmworker-designated rental housing. Coincidentally, all three counties are located in the East Subregion, indication that this specific area of the Balance of State Region may be in the greatest need of farmworker-designated housing. However, as the maps also demonstrate, there are numerous rural counties throughout the entire region that lack farmworker-designated housing yet have large numbers of farmworkers (note: the map's shading represents the estimated farmworkers per county while the numbers shown under each county name indicate the farmworker-designated housing capacity).



West Subregion



East Subregion



North Subregion

Farmworker-Designated Rental Housing Excluded from Study

As noted in this report, this study only considered 49 counties within the four study regions of the state. There are numerous counties that fall within the study regions but did not meet the criteria established by TDHCA as a rural farmworker county. As a result, numerous farmworker-designated housing projects were excluded from our analysis. Regardless, we have provided an inventory of these facilities that are specifically built for farmworkers and their families. Below is a listing of each farmworker housing facility, its location, housing type (USDA/RD 514 & 516 or licensed migrant labor housing), total units and estimated capacity.

Facility Name	County	Housing Type	Total Buildings	Total Units	Capacity (Persons)
Lorenzo Farm Labor Housing	Crosby	USDA 514/516	N/A	40	80*
Amistad Housing	Deaf Smith	USDA 514/516	N/A	50	264
North Park Apartments	Cottle	USDA 514/516	N/A	16	64**
Colonia Remigo Valdesm Jr.	Bexar	USDA 514/516	N/A	75	346
Memorial Apartments	Hidalgo	USDA 514/516	N/A	246	1,312
Northside Apartments	Hidalgo	USDA 514/516	N/A	289	1,302
San Juan Farm Labor Housing	Hidalgo	USDA 514/516	N/A	32	160
Aldo Tatangelo Housing	Webb	USDA 514/516	N/A	48	280
Herbert Tio Cooper Apartments	El Paso	USDA 514/516	N/A	50	300
B & K Rentals/Kenny Welch	Dallam	Licensed Migrant	8	8	72***
B & J Onions	Zapata	Licensed Migrant	1	1	120
Midkiff Farmers Coop	Upton	Licensed Migrant	1	8	16
Los Laureles Ranch	Hidalgo	Licensed Migrant	3	3	33
Radium Gin Co.	Jones	Licensed Migrant	1	1	6
Ericksdahl Coop Gin	Jones	Licensed Migrant	1	1	8
Idalou Cooperative Gin Company	Lubbock	Licensed Migrant	1	14	96
		Total	**16**	**882**	**4,459**

USDA – U.S. Department of Agriculture
N/A – Not Available
Capacity (persons) is based on 2 people per bedroom
*Capacity estimated – unit breakdown not available
**Capacity provided by TDHCA
***Historical total units and capacity – TDHCA 2011 reports that this varies per season

Combined, there are 16 farmworker-designated facilities that were outside the scope of our survey and analysis. These projects have the capacity to house approximately 4,459 farmworkers. While these projects fall outside the geographic areas of our study, some of these units may represent a housing alternative for farmworkers that work in the study areas, particularly temporary housing for migrant farmworkers who may pass through a region for a short period of time.

VI. STAKEHOLDER INTERVIEWS & DEVELOPMENT BARRIERS

A. SUMMARY OF STAKEHOLDER INTERVIEWS

Stakeholder interviews were conducted with over 50 local, county and regional representatives across four rural farmworker regions, as well as stakeholders who address farmworker housing issues on a statewide basis. The regions identified consist of counties within regions 1, 11, and 12, that contain a large number of farmworkers as identified in the "Migrant and Seasonal Farmworker Enumeration Profile Study of Texas" from September of 2000 and that have also been identified as rural counties. The fourth region is the "balance of the state" which includes rural counties identified to have large numbers of farmworkers but that are scattered throughout the remainder of the state. Opinions on farmworker housing issues were sought from many disciplines throughout the housing industry including local, county, regional and statewide government officials, developers, housing authorities, and farmworker housing experts. With the vast size and diverse nature of the farming industry throughout the state of Texas, these interviews provided valuable information allowing us to supplement statistical analysis with local insight and perspectives on those factors that influence and impact development of housing for farmworkers in rural Texas.

Regional stakeholders were asked to respond to the following rural farmworker housing issues as they relate to their specific area of Texas as well as their particular area of expertise. For purposes of clarity, housing designated simply as affordable housing in the following interviews pertains to housing that is non-subsidized and affordable to low-income households at or below 80% of AMHI.

- **Existing Housing Stock**
  - Affordability
  - Housing Types
  - Occupancy
  - Seasonal versus year-round availability
  - Quality and age of housing stock
  - Accompanied/unaccompanied and residence eligibility
  - Location (on or off farm)

- **Housing Needs**
  - Type(s) of housing that best meet migrant and seasonal rural farmworker housing need
  - Affordability
  - Location
  - Community and social service availability
  - Rental versus homeownership

- **Barriers to Rural Farmworker Housing Development**
    - Lack of infrastructure
    - Seasonality
    - Operation and management
    - Financing programs
    - Community support
    - Recommendation to reduce or eliminate barriers

- **Farmworker Housing Development Financing**
    - Farmworker housing development financing options
    - Prioritizing development of farmworker housing funding
    - How existing finance options may be modified to work better

The following summarizes the general content and consensus (when applicable) of the interviews we conducted and are not necessarily the opinions or conclusions of Bowen National Research.

Region 1 (High Plains)

1. Introduction

The rural farmworker counties identified in Region 1, also known as the High Plains Region of Texas, are as follows:

Counties in Region 1			
Bailey	Castro	Cochran	Childress
Collingsworth	Floyd	Hale	Hall
Hockley	Lamb	Lynn	Moore
Parmer	Swisher	Terry	Yoakum

Region 1, according to representatives from the area, is known as a large cotton farming and production area. Cotton ginning is one of the most difficult and labor intensive tasks associated with farm labor and workers typically work 12-16 hour days. Due to the difficulty of the labor, farmworkers prefer to live very close to the gin. Seasonal farmworker families migrate from the Lower Rio Grande Valley during the summer but then the family returns to the Lower Rio Grande Valley in the fall and the men remain to work on the cotton gins. Often times housing is not available or affordable and people will end up living in their vehicle or some other type of makeshift housing.

2. Existing Housing Stock

Much of the existing licensed or subsidized farmworker housing in the region is older housing stock with limited availability. All the USDA 514/516 properties that we surveyed are 100% occupied and all but one property has a waiting list. The licensed migrant labor housing facilities are typically located on the farms or very near to them and stakeholders believe that the farmworkers prefer this arrangement. Typically only unaccompanied male workers live at the properties and these properties are only open seasonally (mainly October through December). Although most of the licensed migrant labor housing facilities are 100% occupied during a typical growing season, this year due to drought conditions fewer farmworkers have been needed for shorter periods, so housing has not been fully occupied. Affordable farmworker housing is for the most part substandard in nature. Older substandard manufactured housing or mobile homes are often offered for rent. Many of these rentals lack basic sanitation, are missing windows, and have holes in the walls or floors.

3. Housing Need

According to representatives and developers that we spoke with, there is a large demand for additional farmworker housing and development has lagged behind demand in recent years. Between 2003 and 2009, there were no USDA farmworker developments funded in the state, however a USDA RD 514/516 funded project was approved in Dallam County* in 2009. This project located in Dalhart, TX will have 36 units of farmworker designated housing and 100% of the units will receive rental assistance. To date, construction has not begun on this project. Representatives believe that a variety of farmworker housing types are needed. That being said, the greatest need in Region 1 according to the majority of local representatives we spoke with, would be for migrant labor housing facilities for unaccompanied farmworkers that is located on or very near the farms where they are employed. Access to community services is reported to be secondary to the desire to be near the farm where they are working. Deep subsidies are important as this housing is not the farmworker's primary residence and they are often renting or purchasing another home as well. Also of note, some officials believe that increasingly, farmworkers in this area are choosing to live in the area year round also increasing the need for year round housing.

*****Dallam County is outside the identified scope of our study

4. **Migrant versus Seasonal Housing Demand**

In Region 1, many of the stakeholders we spoke with indicated that workers in the area are unaccompanied seasonal employees and return to the Lower Rio Grande Valley indicating the greatest need would be for seasonal housing. That being said it was noted that with the new definition of farmworker there is a rising demand for year round facilities.

5. **Barriers to Farmworker Housing Development**

Lack of funding resources, lack of community support and strict compliance regulations for migrant labor housing facilities were all indicated by stakeholders as barriers to providing farmworker housing in Region 1. The state currently does not have a program geared directly toward addressing issues of affordable farmworker designated housing. The development of a farmworker specific program or a funding set-aside within an existing program would go a long way toward financing additional farmworker housing. Timing is also a tremendous problem since USDA requires leveraged funds, but the Tax Credit awards are not announced in time to demonstrate leverage on the USDA application. Local communities have a "make or break" role in the development of farmworker housing. Local support is required for funding, especially for Tax Credits where it is part of the scoring criteria. In various communities throughout Texas, lack of local support has derailed planned developments. Many of the migrant labor housing facility owners/operators mentioned the difficulties with maintaining on site housing facilities in compliance with inspection regulations as they sit vacant for much of the year.

Region 11 (South Texas Border)

1. Introduction

The rural farmworker counties identified in Region 11, also known as the South Texas Border Region, are as follows:

Counties in Region 11	
Dimmit	Maverick
Starr	Uvalde
Val Verde	Willacy
Zavala	

This region of Texas was identified by stakeholders as the area that many farmworkers use as their "home base," with many farmworkers residing in the colonias along the southern Texas border region known as the Lower Rio Grande Valley. Unincorporated portions of the counties do not have zoning, planning or permitting. Many of the structures within rural colonias do not meet building, sanitation or safety standards. According to the survey of rental units conducted by Bowen National Research, the majority of subsidized farmworker housing within these seven counties is more then twenty years old; however, there is one project in Val Verde County that was built in 2009.

2. Existing Housing Stock

According to local representatives the majority of subsidized farmworker designated rental housing stock in the area is older. Due to the drought in 2011, there are affordable subsidized farmworker designated units available as lack of work has forced some residents to seek employment outside the area and in some cases outside the state. Affordable housing is for the most part substandard in nature. Manufactured housing or mobile homes are often offered for rent but are typically in poor condition. In rural colonias in the region, single-family homes are often self-built, piece by piece when money allows. One colonias group estimates that three-quarters of these houses do not meet family needs. For example, 30 to 40 percent of colonia houses lack adequate heating and cooling systems. Lack of running water is another defining characteristic of a colonia. Residents must get water from relatives, buy it in the cities, or pump it from shallow, contaminated wells. Cesspools or septic tanks provide the only waste treatment, and they often flood or leak. Water-borne diseases, such as hepatitis A, cholera, and skin rashes are epidemic.

3. **Housing Need**

The greatest need in Region 11 would be for rehabilitation or demolition and revitalization of existing owner-occupied housing for farmworkers and their families along with first time homebuyer assistance according to representatives. Varying opinions exist regarding the need for additional subsidized affordable rental housing for farmworkers. Although some state there is an increasing need for this type of housing, according to one stakeholder in the region additional farmworker designated housing is not needed in the area as they are having difficulty qualifying residents at this time and occupancy levels are low. Many of the farmworkers in the area no longer travel seasonally and seek out other types of employment in the area rather than relocate.

4. **Migrant versus Seasonal Housing Demand**

Farmworkers in rural areas of this region typically use this as their "home base" and travel to other areas of the state and outside during the growing season returning during the off season. This being said, it was noted by several stakeholders that this trend is changing and many stay in place for the entire year.

5. **Barriers to Farmworker Housing Development**

Lack of infrastructure, lack of available credit sources for farmworkers seeking homeownership, and lack of financing options with set asides specifically for farmworkers are all barriers to housing development in the region according to representatives.

Many of the rural counties in the region do not have the infrastructure in place to support already existing housing development. In particular there is a need for water and sewage treatment.

With credit being extremely tight and acceptable credit scores for home financing being 620 and up, many farmworkers are unable to obtain financing. Credit issues may not necessarily be due to bad credit, but to the lack of credit in general as farmworkers are typically a "cash culture", according to officials.

Developers indicated that there is little incentive to develop farmworker housing as there are no specific set aside funds or scoring incentives associated with this type of development.

Region 12 (West Texas)

1. Introduction

The rural farmworker counties identified in Region 12, also known as the West Texas Region, are as follows:

Counties in Region 12	
Dawson	Gaines
Glasscock	Howard
Martin	Reeves

As in other rural farmworker regions across the state of Texas, Region 12 has been deeply affected by the drought. Representatives from the farmworker facilities that we spoke with stated that fewer than half of the farmworkers they have housed in previous years required housing this year as work crews on the farms were 50-100% smaller. Typically, in previous years these same facilities are 100% occupied mainly by single unaccompanied male farmworkers. Based on Bowen National Research survey results there are currently no USDA RD 514/516 projects within the rural farmworker counties that were surveyed in this region.

2. Existing Housing Stock

Atypical for licensed farmworker housing in the region, in 2011, representatives from the majority of licensed migrant labor housing facilities that we spoke with are not 100% occupied as they have been in previous seasons. This is attributed to the extreme drought conditions this region has experienced in 2011. There are no USDA 514/516 properties located within Region 12. Licensed migrant labor housing facilities are typically located on the farms or very near to them. Representatives from the licensed migrant labor housing facilities that we spoke with indicated that most farmworkers housing facilities are on average 18 miles from the nearest town and access to community services. Typically, only unaccompanied male workers live at the properties and these properties are only open seasonally (mainly October through December). Affordable housing is for the most part substandard in nature. It was noted that when farmworkers are unable to find affordable rental housing they may sleep in their vehicles or other substandard forms of housing. Few of the officials or representatives that we spoke with were willing to address the issue of unlicensed farmworker housing.

3. **Housing Need**

According to representatives and developers that we spoke with, there is a large demand for additional farmworker housing in general. When seasons are busy, it is tough to house all the workers needed. The greatest need in Region 12 would be for additional migrant labor housing facilities for unaccompanied farmworkers that are located on or very near the farms where they are employed. Although access to community services is important, stakeholders stated that farmworkers will typically provide rides into town for farmworkers who do not have a vehicle available to them. Of the migrant labor housing facilities that we spoke with in this region all were free of charge. Deep subsidies are extremely important as often times farmworkers are supporting permanent housing in another location as well.

4. **Migrant versus Seasonal Housing Demand**

In Region 12, many of the stakeholders we spoke with indicated that workers in the area are unaccompanied seasonal employees and return to the Lower Rio Grande Valley after the season is over or come from the north as the growing season there ends and then continue south through Texas.

5. **Barriers to Farmworker Housing Development**

Lack of funding resources, lack of available farmworker data and strict compliance regulations for migrant labor housing facilities were indicated by stakeholders as barriers to providing farmworker housing in Region 12. According to housing providers, little incentive is provided to build farmworker housing in general. An issue with identifying the number of farmworkers in a given area and identifying the quantity of additional farmworker housing units needed is also a major barrier to development. Many of the migrant labor housing facilities mentioned the difficulties with maintaining on-site housing facilities in compliance with inspection regulations. State and federal regulations are very confusing and no clear cut rules have been defined. Regulations are often loosely interpreted causing additional confusion.

Bowen National Research conducted research of state (Texas) and federal regulations as they relate to the design and maintenance of migrant labor housing facilities. The table at the end of this section summarizes some of the key differences we identified, some of which were cited by some of the stakeholders we interviewed.

Balance of the State

1. Introduction

The rural farmworker counties identified in the balance of the state of Texas are as follows:

Counties in the Balance of the State			
Comanche	De Witt	Duval	Eastland
Fisher	Frio	Haskell	Hudspeth
Jim Wells	Kleberg	Lamar	Mitchell
Nolan	Presidio	Runnels	Shelby
Scurry	Titus	Wharton	Wilbarger

These counties represent vast differences in regard to both geography and the types of crops and farming that is prevalent from county to county. As a result, farmworker housing in this region is as varied as the counties themselves.

2. Existing Housing Stock

There is no subsidized farmworker designated rental housing or migrant labor housing facilities within the balance of the state of Texas in the rural farmworker counties addressed in this study. Farmworker housing in these regions in general is clustered near the major cities, if there is any, or is unsubsidized and unlicensed in nature. Typically, affordable housing stock is older and substandard in nature according to the representatives we spoke with. In areas where farmworkers are living in the county year round, they may seek out other types of subsidized housing if it is available.

3. Housing Need

As stated by representatives, farmworker housing needs vary in different areas depending on the time of year. Most families that migrate from the Lower Rio Grande Valley travel in family groups during the summer months increasing the need for accompanied farmworker housing. In the fall, many families return to the Valley and the men continue to work in various aspects of the agricultural industry depending on the growing season. Therefore, there is a need for migrant labor housing facilities, both for accompanied and unaccompanied farmworkers. However, a trend in recent years has been identified that many farmworker families are remaining within a region year-round and seeking employment other than farm labor to supplement their income in the off-season, in particular if they are able to find affordable, suitable and safe housing.

4. **Migrant versus Seasonal Housing Demand**

Both year round and seasonal housing are needed in these counties as presently no licensed or designated farmworker housing exists.

5. **Barriers to Farmworker Housing Development**

Lack of funding resources, lack of community support and lack of available farmworker data are all barriers to farmworker housing development in the balance of the state. According to developers, little incentive is provided to build farmworker housing in general. There is an issue with identifying the number of farmworkers in any given area, but with the balance of the state being such a diverse region representatives state that it is far more difficult to identify the areas of greatest need and to identify the most efficient means of addressing that demand. Community support is also an issue often faced by developers with regard to farmworker designated housing. In particular with regard to LIHTC projects, lack of support from the local community can sideline a project as community support is often required for securing financing.

Federal versus State Building and Maintenance Regulations

The following table compares some of the notable differences between Federal and State building and maintenance regulations as they relate to migrant farmworker housing. It is important to note that all projects housing migrant farmworkers must comply with the Federal guidelines cited below. However, only licensed migrant labor housing that is licensed through the Texas Department of Housing and Community Affairs must meet state guidelines. As such, only projects that are licensed by TDHCA must comply with both entities' guidelines. A total of 19 licensed migrant labor housing facilities are within the areas we studied in this analysis.

Federal Guideline	State of Texas Guideline
…..suitable storage facilities such as **wall lockers** for clothing and personal articles shall be provided in every room used for sleeping purposes (1910.142(b)(3)	Adequate, separate arrangements for person or family to hang clothes and store personal effect shall be provided ((d) Facilities paragraph (6))
All living quarters shall be provided with windows the total of which shall be not less than one-tenth of the floor area. **At least one-half of each window** shall be so constructed that it can be opened for purposes of ventilation (1910.142(b)(7)	Each habitable room shall have at least one window or skylight opening to the outside. The minimum total window or skylight area, including windows and doors shall equal 10% of usable floor area. The total area that can be opened shall equal **at least 45% of the minimum window** or skylight area required, except where comparable adequate ventilation is supplied by mechanical or some other method ((d) Facilities paragraph (8))
Where toilet facilities are shared, the number of water closets or privy seats provided for each sex shall be based on the maximum number of person of that sex which the camp is designed to house at any time, in the ratio of one such unit to each 15 persons, with a minimum of two units for any shared facility (1910.142(d)(5)	No specific guideline identified
Every service building shall be provided with equipment capable of maintaining a temperature of at least **70 deg. F** during cold weather (1910.142(f)(4)	All living quarters and service rooms shall be provided with properly installed, operable heating equipment that (is) capable at all times of maintaining a temperature of at least **68 degrees F**. If heating is centrally controlled, all areas affected shall be maintained at 68 degrees F. at all times. ((g) Heating paragraph (1))
Privies and toilet rooms shall be kept in a sanitary condition**. They shall be cleaned at least daily** (1910.142(d)(10)	Bathrooms and laundry rooms shall be constructed in a manner conducive to good repair and shall be maintained in good repair and sanitary condition ((h)Bathrooms and laundry rooms paragraph (3))
Urinals shall be provided on the basis of one unit or 2 linear feet of urinal trough for each 25 men. The floor from the wall and for a distance not less that 15 inches measured from the outward edge of the urinals shall be constructed of materials impervious to moisture. Where water under pressure is available, urinals shall be provided with an adequate water flush. Urinal troughs in privies shall drain freely into the pit or vault and the construction of this drain shall be such as to exclude flies and rodents from the pit.(1910.142 (d) (6)	No corresponding guideline identified
An adequate supply of toilet paper shall be provided in each privy, water closet, or chemical toilet compartment (1910.142 (d) (9)	No corresponding guideline identified

Federal Guideline	State of Texas Guideline
Floors shall be of smooth but not slippery materials; they shall be impervious to moisture. Floor drains shall be provided in all shower baths, shower rooms, or laundry rooms to remove waste water and facilitate cleaning**. All junctions of the curbing and the floor shall be coved.** The walls and partitions of shower rooms shall be smooth and impervious to the height of splash. 1910.142 (f) (2)	Shower flooring shall be constructed of nonabsorbent, nonskid materials and shall have properly constructed and functioning floor drains ((Bathrooms and Laundry Rooms paragraph (4))
Facilities for drying clothes shall be provided 1910.142 (f) (4)	No corresponding guideline identified
"Lighting" Where electric service is available, each habitable room in a camp shall be provided with at least on ceiling-type light fixture and at least one separate floor – or wall-type convenience outlet. Laundry and toilet rooms and rooms where people congregate shall contain at least one ceiling- or wall-type fixture. Light levels in toilet and storage rooms shall be at least 20 foot-candles 30 inches from the floor. Other rooms, including kitchens and living quarters, shall be at least 30 foot-candles 30 inches from the floor 1910.142 (g)	Adequate lighting and ventilation ((Cooking and Eating Arrangements paragraph (F)) (only mention of lighting)
Fly-tight, impervious, cleanable or single service containers, approved by the appropriate health authority shall be provided for the storage of garbage. At least one such container shall be provided for each family shelter and shall be located within 100 feet of each shelter on a wooden, metal or concrete stand	No corresponding guideline identified
Garbage containers shall be kept clean	No corresponding guideline identified
Garbage containers shall be emptied when full, but not less than twice a week	No corresponding guideline identified
Source: United States Department of Labor Occupational Safety and Health Administration (OSHA) Regulations (Standards – 29 CFR) (Part Number: 1910; Part Title: Occupation Safety and Health Standards; Subpart: J; Subpart Title: General Environmental Control Standard Number: 1910.142)	Source: Texas Administrative Code – Community Development – TDHCA Migrant Labor Housing Facilities (Title 10; Part 1; Chapter 90; Rule 90.2)

As the preceding table illustrates, there are some federal and state regulations that do not coincide, while in other cases the federal regulations provide specific requirements and the state guidelines do not have a requirement. Some stakeholders indicated that they have difficulty determining which regulations apply to their project, which in turn create challenges for them to develop or maintain migrant labor housing facilities.

The Department of Labor - Wage and Hour Division is responsible for enforcement of regulations with regard to all Migrant and Seasonal Agricultural Worker Housing in association with the Migrant and Seasonal Agricultural Worker Protection Act. The DOL-WHD inspects both USDA and migrant labor housing facilities, but only if a possible violation is reported. The DOL–WHD only enforces federal regulations, however, according to a DOL-WHD representative, when a discrepancy arises between a state and a federal regulation, the more stringent regulation takes precedence and is enforced by the corresponding entity (DOL-WHD or TDHCA).

VII. HOUSING DEMAND ANALYSIS

This section of the report attempts to quantify farmworker housing needs that may exist in each study area by comparing the number of farmworkers with the number of housing units specifically designated for the farmworker population. A variety of data sources were used to estimate the number of farmworkers including the Census of Agriculture, the National Agricultural Worker Survey, the Migrant and Seasonal Farmworker Enumeration Profiles study, Department of Labor statistics, and estimates of Bowen National Research. The inventory of farmworker housing was determined through identification and telephone survey of farmworker-designated housing from TDHCA's list of migrant labor housing facilities and USDA's farmworker housing projects funded through the 514 and 516 programs. The estimated farmworkers are then compared with the farmworker housing capacity in each market to determine the gap that might exists in each market for farmworker housing. **It is important to consider that this analysis is limited only to the rural-designated counties that met the study's criteria for analysis and does not include all counties that fall within a region.**

A. REGIONAL FARMWORKER HOUSING GAP ANALYSIS

As shown in Section III of this report, Bowen National Research estimated that there are 34,520 farmworkers within the four study regions of Texas. It is important to note that this estimate of farmworkers only applies to the 49 subject counties that met the TDHCA requirement of rural farmworker counties, for the purposes of this study. As such, very rural counties with few farmworkers or counties with an urban center were not included in our regional estimates. As such, our estimates only consider a portion of the farmworkers that are within an entire region.

Using a variety of farmworker demographic sources cited above and used in the calculations detailed in Section III of this report, Bowen National Research estimated the number of individual farmworkers by income level for each study region for 2010. The estimate was provided on the individual worker level.

The estimated number of farmworkers by income level for 2010 by study region and including only the rural farmworker counties within the respective region is included in the following table:

	Farmworkers (Individuals) by Annual Income (2010)				
	Less than $10,000	$10,000 - $19,999	$20,000 - $29,999	$30,000 & Higher	Total
Region 1 High Plains	2,436	5,205	2,326	1,107	11,074
Region 11 South Texas Border	1,069	2,284	1,021	486	4,860
Region 12 West Texas	1,065	2,276	1,017	484	4,842
Region Balance	3,024	6,459	2,886	1,375	13,744
Total	7,594	16,224	7,250	3,452	34,520

Source: Bowen National Research; NAWS (2005 to 2009)
Note: data is limited to only the counties that met the farmworker county designation

For the purposes of our demand estimates, we have assumed that farmworkers with incomes above $30,000 will generally choose housing funded through the Low-Income Housing Tax Credit program or conventionally-financed projects, and farmworkers with annual incomes below $30,000 will generally choose from the migrant labor housing alternatives offered in the region or from farmworker housing funded through the Rural Development 514 and 516 programs. As such, we have deducted only the capacity of the farmworker housing projects from the total number of farmworkers making less than $30,000 annually to determine the potential housing gap that exists in each housing market studied.

The estimated distribution of individual farmworkers with annual incomes below $30,000 by region is summarized in the following table:

	Farmworkers Making Less than $30,000 Annually
Region 1 High Plains	9,967
Region 11 South Texas Border	4,374
Region 12 West Texas	4,358
Region Balance	12,369
Total	31,068

Source: Bowen National Research; NAWS (2005 to 2009)
Note: data is limited to only the counties that met the farmworker county designation

The estimated 31,068 farmworkers with annual incomes below $30,000 were included in the demand estimates by region.

As shown in the supply analysis section of this report there is a housing capacity for 2,537 farmworkers in the subject counties that fall within the four regions evaluated in this report. The following table summarizes the farmworker housing capacity by region:

	Rural Texas Farmworker-Designated Rental Housing Inventory 2011								
	Migrant Labor Housing Facilities			USDA/RD 514 & 516 Farmworker Housing			Total Farmworker Housing		
	Projects	Units	Capacity	Projects	Units	Capacity*	Projects	Units	Capacity
Region 1 High Plains	12	122	542	5	207	814	**17**	**329**	**1,356**
Region 11 South Texas Border	0	0	0	4	177	984	**4**	**177**	**984**
Region 12 West Texas	7	46	197	0	0	0	**7**	**46**	**197**
Balance of State	0	0	0	0	0	0	**0**	**0**	**0**
Total	19	168	739	9	384	1,798	**28**	**552**	**2,537**

Note: Capacity for USDA/RD 514 & 516 Farmworker Housing is based on 2 people per bedroom

Note: data is limited to only the counties that met the farmworker county designation

These 2,537 farmworker-designated housing units are considered in our housing gap analysis. It is important to note that while there were no farmworker-designated housing units identified within *Balance of State*, there are likely such housing units within this region that were in other counties not included as part of this study.

The following table summarizes the farmworker housing gap analysis that considers the housing capacity of farmworker facilities and the number of low-income farmworkers by study region:

	Farmworker Housing Gap Estimates		
	Low-Income Farmworkers ($30,000)	**Farmworker Housing Capacity**	**Housing Gap**
Region 1 High Plains	9,967	1,356	8,611
Region 11 South Texas Border	4,374	984	3,390
Region 12 West Texas	4,358	197	4,161
Balance of State	12,369	0	12,369
Total	31,068	2,537	28,531

Note: data is limited to only the counties that met the farmworker county designation

As the preceding table illustrates, 28,531 farmworkers in the counties within the study regions are not housed in farmworker-designated housing. The Balance of State region has the largest farmworker housing gap, with 12,369 farmworkers not housed in farmworker-designated housing. While there are farmworker housing units in the region, none of them fall within any of the 20 counties studied within the region. Certainly, these farmworkers are being housed in other rental alternatives throughout the region; however, none of these farmworkers are living in farmworker-designated housing. As a result, many of these farmworkers are likely paying a higher share of their income towards rents than those living in farmworker-designated housing. Region 1, despite its offering the largest capacity (1,356) of farmworker-designated housing, has a housing gap deficit of 8,611. While the housing gaps are smaller in regions 11 and 12, these regions' housing gaps of 3,390 (region 11) and 4,161 (region 12) are significant and indicate that 77.5% to 95.4% of all farmworkers are living in non-farmworker housing.

B. FARMWORKER HOUSING DEMAND BY COUNTY

Region 1 (High Plains)

The estimated number of farmworkers by income level for 2010 by study region and including only the rural farmworker counties within the respective region is included in the following table:

	Farmworkers (Individuals) by Annual Income (2010)				
County	Less than $10,000	$10,000 - $19,999	$20,000 - $29,999	$30,000 & Higher	Total
Bailey	64	136	61	29	290
Castro	86	185	83	39	393
Childress	27	58	26	12	123
Cochran	87	186	83	40	395
Collingsworth	40	85	38	18	181
Floyd	206	440	197	94	936
Hale	389	831	371	177	1,767
Hall	56	120	54	26	255
Hockley	227	485	217	103	1,032
Lamb	308	657	294	140	1,398
Lynn	168	358	160	76	761
Moore	92	197	88	42	419
Parmer	143	305	136	65	648
Swisher	112	240	107	51	511
Terry	254	543	243	115	1155
Yoakum	178	380	170	81	808
Total	**2,436**	**5,205**	**2,326**	**1,107**	**11,074**

Source: Bowen National Research; NAWS (2005 to 2009)

For the purposes of our demand estimates, we have assumed that farmworkers with annual incomes below $30,000 will generally choose from the migrant labor housing alternatives offered in the region or from farmworker housing funded through the Rural Development 514 and 516 programs. As such, we have deducted the capacity of the farmworker housing projects from the total number of farmworkers making less than $30,000 annually to determine the potential housing gap that exists in each housing market studied.

As shown in the supply analysis section of this report there is a housing capacity for 2,537 farmworkers in the subject counties that fall within the four regions evaluated in this report. Region 1 has a farmworker housing capacity for 1,356 workers, or more than half of all the study areas combined.

The following table summarizes the farmworker housing capacity by county:

County	Rural Texas Farmworker-Designated Rental Housing Inventory 2011		
	Projects	Units	Capacity
Bailey	1	72	236
Castro	1	32	192
Childress	0	0	0
Cochran	1	51	270
Collingsworth	0	0	0
Floyd	0	0	0
Hale	4	57	286
Hall	0	0	0
Hockley	3	44	88
Lamb	3	33	124
Lynn	3	39	120
Moore	0	0	0
Parmer	0	0	0
Swisher	0	0	0
Terry	0	0	0
Yoakum	1	1	40
Total	**17**	**329**	**1,356**

Note: data is limited to only the counties that met the farmworker county designation

Hale and Cochran Counties have the largest capacities to house farmworkers in farmworker-designated housing. One-half of the selected rural counties offer farmworker-designated housing, while the remaining counties (eight in total) do not. The farmworker housing capacity by county is compared with the number of low-income farmworkers on the following page.

The following table summarizes the farmworker housing gap analysis that considers the housing capacity of farmworker facilities and the number of low-income farmworkers by county:

	Farmworker Housing Gap Estimates		
County	Low-Income Farmworkers (Less than $30,000)	Farmworker Housing Capacity	Housing Gap
Bailey	261	236	25
Castro	354	192	162
Childress	111	0	111
Cochran	356	270	86
Collingsworth	163	0	163
Floyd	843	0	843
Hale	1,591	286	1,305
Hall	230	0	230
Hockley	929	88	841
Lamb	1,259	124	1,135
Lynn	686	120	566
Moore	377	0	377
Parmer	584	0	584
Swisher	459	0	459
Terry	1,040	0	1,040
Yoakum	728	40	688
Total	**9,967**	**1,356**	**8,615**

Note: data is limited to only the counties that met the farmworker county designation

As the preceding table illustrates, each study county has a deficit of farmworker housing. It appears, however, that the existing farmworker-designated housing in Bailey and Cochran Counties has met the need for most of the farmworkers in these particular counties. Counties with the largest deficits of farmworker housing include Hale, Lamb and Terry Counties. It is of note that Terry County does not have any farmworker-designated housing and appears to have one of the largest bases of farmworkers.

Region 11

The estimated number of farmworkers by income level for 2010 by study region and including only the rural farmworker counties within the respective region is included in the following table:

	Farmworkers (Individuals) by Annual Income (2010)				
County	Less than $10,000	$10,000 - $19,999	$20,000 - $29,999	$30,000 & Higher	Total
Dimmit	36	78	35	17	166
Maverick	102	219	98	47	465
Starr	220	469	210	100	998
Uvalde	350	748	334	159	1,591
Val Verde	81	174	78	37	370
Willacy	219	469	209	100	997
Zavala	60	129	57	27	274
Total	**1,069**	**2,284**	**1,021**	**486**	**4,860**

Source: Bowen National Research; NAWS (2005 to 2009)
Note: data is limited to only the counties that met the farmworker county designation

For the purposes of our demand estimates, we have assumed that farmworkers with incomes below $30,000 will generally choose from the migrant labor housing alternatives offered in the region or from farmworker housing funded through the Rural Development 514 and 516 programs. As such, we have deducted the capacity of the farmworker housing projects from the total number of farmworkers making less than $30,000 annually to determine the potential housing gap that exists in each housing market studied.

Region 11 has a farmworker housing capacity for 984 workers. The following table summarizes the farmworker housing capacity by county:

	Rural Texas Farmworker-Designated Rental Housing Inventory 2011		
County	Projects	Units	Capacity
Dimmit	0	0	0
Maverick	1	60	352
Starr	0	0	0
Uvalde	0	0	0
Val Verde	1	42	296
Willacy	1	49	196
Zavala	1	26	140
Total	**4**	**177**	**984**

Note: data is limited to only the counties that met the farmworker county designation

Maverick County has the largest capacity (352 workers) to house farmworkers in farmworker-designated housing. Four of the seven selected rural counties offer farmworker-designated housing. The farmworker housing capacity by county is compared with the number of low-income farmworkers below.

The following table summarizes the farmworker housing gap analysis that considers the housing capacity of farmworker facilities and the number of low-income farmworkers by county.

	Farmworker Housing Gap Estimates		
County	**Low-Income Farmworkers ($30,000)**	**Farmworker Housing Capacity**	**Housing Gap**
Dimmit	149	0	149
Maverick	419	352	67
Starr	899	0	899
Uvalde	1,432	0	1,432
Val Verde	333	296	37
Willacy	897	196	701
Zavala	246	140	106
Total	**4,374**	**984**	**3,390**

Note: data is limited to only the counties that met the farmworker county designation

Maverick County has the largest capacity to house farmworkers and appears to have met the need for most of the farmworkers, as it has the smallest deficit (67) of housing. It also appears that the housing capacity of 296 in Val Verde County has met most of the estimated demand in the county, with a housing gap of 37. The largest housing gap is in Uvalde, which has 1,432 farmworkers, yet no farmworker designated housing. All other selected counties within the region has a housing gap of over 100, requiring housing to accommodate more than 100 workers.

Region 12

The estimated number of farmworkers by income level for 2010 by study region and including only the rural farmworker counties within the respective region is included in the following table:

	Farmworkers (Individuals) by Annual Income (2010)				
County	Less than $10,000	$10,000 - $19,999	$20,000 - $29,999	$30,000 & Higher	Total
Dawson	331	706	316	150	1,503
Gaines	505	1,078	482	229	2,293
Glasscock	56	120	54	26	256
Howard	61	131	59	28	279
Martin	83	177	79	38	376
Reeves	30	63	28	13	134
Total	**1,065**	**2,276**	**1,017**	**484**	**4,842**

Source: Bowen National Research; NAWS (2005 to 2009)
Note: data is limited to only the counties that met the farmworker county designation

For the purposes of our demand estimates, we have assumed that farmworkers with annual incomes below $30,000 will generally choose from the migrant labor housing alternatives offered in the region or from farmworker housing funded through the Rural Development 514 and 516 programs. As such, we have deducted the capacity of the farmworker housing projects from the total number of farmworkers making less than $30,000 annually to determine the potential housing gap that exists in each housing market studied.

Region 12 has a farmworker housing capacity for 197 workers. The following table summarizes the farmworker housing capacity by county:

	Rural Texas Farmworker-Designated Rental Housing Inventory 2011		
County	Projects	Units	Capacity
Dawson	2	9	40
Gaines	2	13	68
Glasscock	2	17	61
Howard	0	0	0
Martin	1	7	28
Reeves	0	0	0
Total	**7**	**46**	**197**

Note: data is limited to only the counties that met the farmworker county designation

Gaines and Glasscock Counties have the capacity to house over 60 farmworkers in farmworker-designated housing. Gaines County has the largest capacity at 68. Two of the counties, Howard and Reeves, do not have any farmworker designated housing. The farmworker housing capacity by county is compared with the number of low-income farmworkers below.

The following table summarizes the farmworker housing gap analysis that considers the housing capacity of farmworker facilities and the number of low-income farmworkers by county.

	Farmworker Housing Gap Estimates		
County	**Low-Income Farmworkers ($30,000)**	**Farmworker Housing Capacity**	**Housing Gap**
Dawson	1,353	40	1,313
Gaines	2,065	68	1,997
Glasscock	230	61	169
Howard	251	0	251
Martin	339	28	311
Reeves	121	0	121
Total	**4,358**	**197**	**4,161**

Note: data is limited to only the counties that met the farmworker county designation

The housing gaps in both Dawson and Gaines Counties are very high, with farmworker housing deficits of 1,313 farmworkers in Dawson County and 1,997 farmworkers in Gaines County. These are significant gaps and indications that the current farmworker-designated projects are meeting a very small portion of the farmworker housing needs in these particular counties. The remaining counties have farmworker housing deficits ranging from 121 to 311.

Balance of State

The estimated number of farmworkers by income level for 2010 by study region and including only the rural farmworker counties within the respective region is included in the following table:

	Farmworkers (Individuals) by Annual Income (2010)				
County	Less than $10,000	$10,000 - $19,999	$20,000 - $29,999	$30,000 & Higher	Total
Comanche	67	143	64	30	304
DeWitt	358	766	342	163	1,629
Duval	15	32	14	7	69
Eastland	218	466	208	99	992
Fisher	77	164	73	35	348
Frio	240	513	229	109	1091
Haskell	119	255	114	54	542
Hudspeth	111	238	106	51	505
Jim Wells	42	89	40	19	190
Kleberg	67	144	64	31	306
Lamar	34	73	32	15	155
Mitchell	55	117	52	25	249
Nolan	29	62	28	13	131
Presidio	196	418	187	89	890
Runnels	58	123	55	26	262
Scurry	33	70	31	15	148
Shelby	101	216	96	46	459
Titus	174	372	166	79	792
Wharton	962	2,054	918	437	4,370
Wilbarger	68	146	65	31	310
Total	**3,024**	**6,459**	**2,886**	**1,374**	**13,743**

Source: Bowen National Research; NAWS (2005 to 2009)
Note: data is limited to only the counties that met the farmworker county designation

For the purposes of our demand estimates, we have assumed that farmworkers with annual incomes below $30,000 will generally choose from the migrant labor housing alternatives offered in the region or from farmworker housing funded through the Rural Development 514 and 516 programs. As such, we have deducted the capacity of the farmworker housing projects from the total number of farmworkers making less than $30,000 annually to determine the potential housing gap that exists in each housing market studied.

There are no farmworker-designated housing units within this region. As such, there is no supply to consider in our demand estimates on the following page.

The following table summarizes the farmworker housing gap analysis that considers the housing capacity of farmworker facilities and the number of low-income farmworkers by study region:

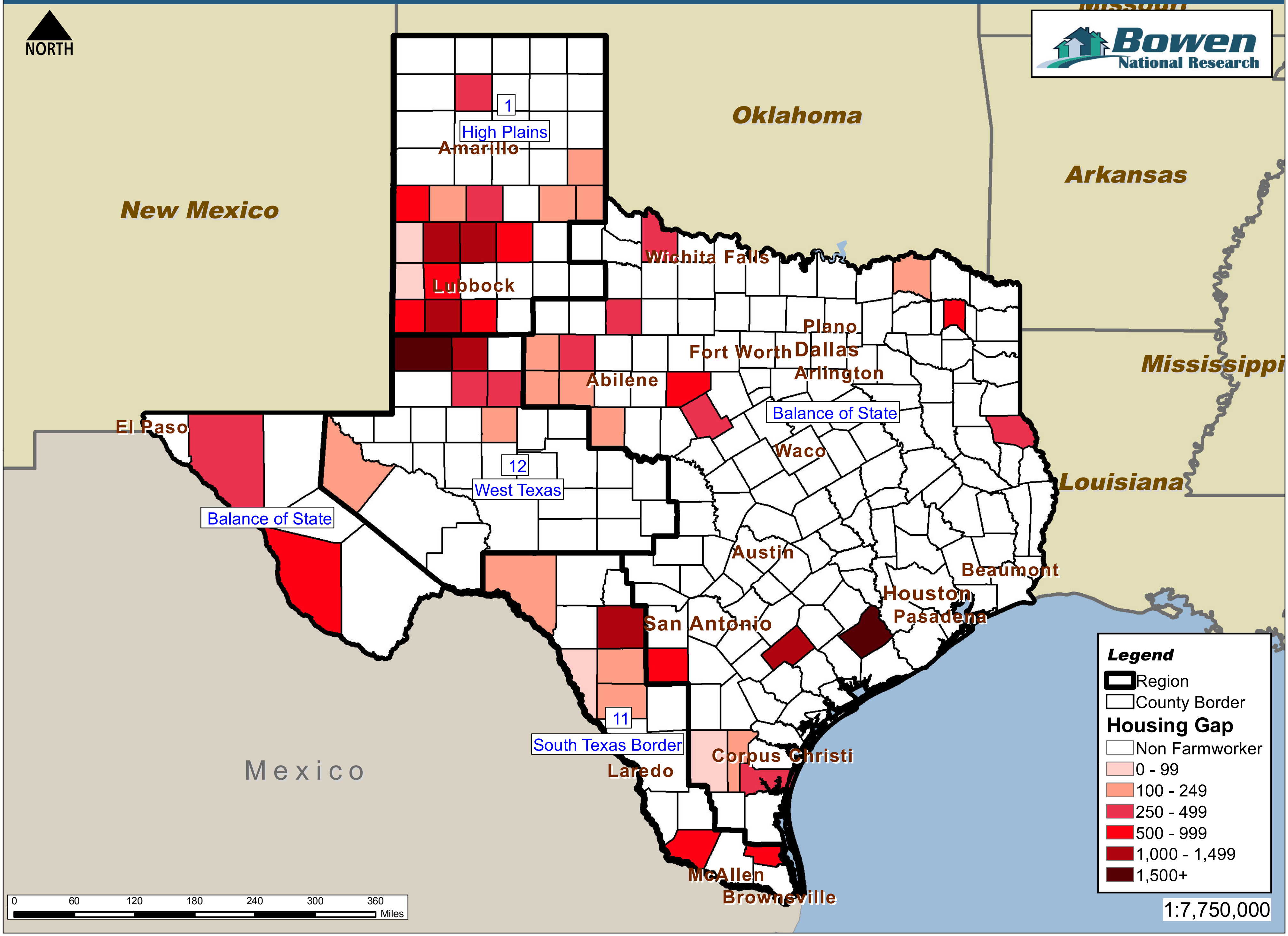
County	Farmworker Housing Gap Estimates: Low-Income Farmworkers ($30,000)	Farmworker Housing Capacity	Housing Gap
Comanche	274	0	274
DeWitt	1,466	0	1,466
Duval	61	0	61
Eastland	892	0	892
Fisher	314	0	314
Frio	982	0	982
Haskell	488	0	488
Hudspeth	455	0	455
Jim Wells	171	0	171
Kleberg	275	0	275
Lamar	139	0	139
Mitchell	224	0	224
Nolan	119	0	119
Presidio	801	0	801
Runnels	236	0	236
Scurry	134	0	134
Shelby	413	0	413
Titus	712	0	712
Wharton	3,934	0	3,934
Wilbarger	279	0	279
Total	12,369	0	12,369

Note: data is limited to only the counties that met the farmworker county designation

Despite the fact that Wharton County has the largest estimated number of farmworkers in the region, it, like all other counties in the region, does not offer any farmworker-designated housing. With nearly 4,000 farmworkers in the county, the farmworkers in this county must choose from a variety of housing alternatives in the market; however, none of these facilities are specifically designed to meet the needs of area farmworkers. DeWitt, Eastland, Frio, Presidio, and Titus Counties also have large bases of farmworkers (more than 700 each), yet do not have any farmworker-designated housing. Only Duval County has a housing deficit of less than 100.

The map on the following page illustrates the farmworker housing gap by study county. Counties shaded in darker red indicate the greater housing gaps.

Farmworker Counties: Housing Gap



VIII. BEST PRACTICES/RECOMMENDATIONS

A. BEST PRACTICES - CASE STUDIES

In an effort to identify the best practices put in place by other states that are confronted with the issues associated with providing migrant and seasonal farmworker housing, we spoke with farmworker housing experts to assist us in identifying states that are currently considered to be at the forefront of farmworker housing development.

There are a variety of differences between Texas and the states that were chosen for case studies; however we believe these states provide valuable insight into the evolution and development of migrant and seasonal farmworker housing programs.

Washington

1. State Profile

a. Top Crop Items per Acre - Source: *USDA Census of Agriculture 2007*

- Wheat for grain; all
- Forage; hay, haylage, grass stage and green chop
- Vegetables harvested for sale
- Barley for grain
- Apples

b. Statewide Farm Statistics - Source: *USDA Census of Agriculture 2007*

- Number of Farms – 39,284 farms
- Land in Farms – 14,972,789 acres
- Average Farm Size – 381 acres

c. Number of Farmworker Housing Units and Beds - Source: *Farmworker Housing in Washington State: Progress to Date December 2007*

- Seasonal Housing - Number of Beds - 6,378 beds
- Permanent Housing – Number of Units - 1,068 units

Note: Totals are number of beds and units developed between 1999 and 2007

d. Peak Growing Season – July through October

e. Migrant and Seasonal Farmworkers and Non-Farmworkers

Type of Worker	Farmworkers	Non-Farmworker	Total Farmworker and Non-Farmworker
Migrant	64,411	16,531	80,942
Seasonal	120,677	84,696	205,373
Total All	185,088	101,227	286,315

Source: Migrant and Seasonal Farmworker Enumeration Profiles Study – Washington September 2000; Alice C. Larson PhD

Note: Non-farmworkers are defined as individuals living in a farmworker household (i.e. non-farmworker spouse, children or extended family

2. State and Local Programs

Information obtained from the State of Washington Department of Commerce website states that the Washington Farmworker Housing Program's three-pronged strategy for addressing the state's farmworker housing shortage includes providing grants and loans for the following:

- Capital investments in permanent (year-round) housing for farmworkers
- Capital and operating investments in seasonal housing for migrant workers
- Emergency assistance for migrant workers that are homeless or have been displaced due to health and safety issues

With monies allocated from the State Housing Trust Fund, the Department of Community Trade and Economic Development (within the Department of Commerce) has created programs to support farmworker housing development and retain existing farmworker housing units. Consistent with the three-pronged approach initially identified; programs have been designed to address permanent, temporary, and emergency housing needs within the state. Specific programs were identified as follows:

Permanent and Seasonal Housing Grants and Loans

In 1999, a legislative proviso established funding for the Farmworker Housing program within the Housing Trust Fund. These grants and loans are made to nonprofits and local governments for capital improvements in year-round and seasonal farmworker housing.

Emergency Voucher Assistance

This program, administered by the Department of Health, provides vouchers for farmworkers displaced due to unsafe living conditions, for up to ten days at licensed facilities, shelters or motels. The Community Trade and Economic Development Department provides operating support to local service providers for the coordination of emergency services during peak harvest periods.

Infrastructure Loan Program

This program is available to growers to finance repair of infrastructure for existing housing or installation of infrastructure for new housing needed to support farmworker housing development. Housing must be used for seasonal occupancy by migrant or seasonal farmworkers and must be located on land owned or controlled by the grower. The grower must match loan funds at least dollar for dollar. The growers match may include funds spent toward construction or repair of housing.

Rent-A-Tent Program

The Rent-A-Tent program through the CTED is operated by the Washington Growers League. Cherry growers throughout the state are eligible to use this program to house their seasonal employees. Growers must provide cooking, bathing and restroom facilities as well as a concrete pad for each tent and all facilities must meet Washington State Department of Health regulations for cherry harvest camps and be licensed annually. Tents are approximately 14’ x 24’ and are provided with seven folding cots each. The cost per tent with cots is $12 per night and includes delivery, set-up and removal. Growers must sign a rental contract with the Washington Growers League.

One-Stop Clearinghouse

Technical assistance is provided to nonprofits, local governments, and growers through the One-Stop Clearinghouse on farmworker housing planning and development issues.

Low Income Housing Tax Credit Program

The Washington State Housing Finance Commission administers the LIHTC program and priority is given to farmworker housing projects. Development of farmworker housing is incentivized by giving an additional 35 points to farmworker designated housing, during the LIHTC scoring process. The use of Tax Credit financing leveraged with other farmworker programs has been an effective development tool.

Office of Rural and Farmworker Housing

The Office of Rural and Farmworker Housing is a private statewide nonprofit organization that offers a variety of development services, including market analysis, land assembly, project management assistance and low interest pre-development loans.

Washington Growers League

The Washington Growers League works with the Office of Rural and Farmworker Housing to provide development and technical assistance to low-income housing developers. It also administers the Department of Community, Trade and Economic Development's Rent-A-Tent Program.

3. Program Results

According to a recent study conducted by the State of Washington Department of Community, Trade and Economic Development entitled "Farmworker Housing in Washington State: Progress to Date December 2007;" Since the farmworker housing program was established, between 1999 and 2007 CTED has invested over $65.1 million toward the development and preservation of farmworker housing in the State of Washington. These investments are summarized as follows.

Permanent (Year-Round) Housing

Since 1999, CTED has invested $38.4 million in the development of permanent housing for farmworkers that remain in the area year round. Capital investments in rental and homeownership projects have resulted in the creation of 1,068 housing units for farmworkers.

Seasonal Housing

Since 1999, investments totaling $26.7 million have resulted in the creation or preservation of 6,378 seasonal beds for migrant workers, including: 715 beds of community-based housing for migrant workers. Projects are developed, owned and managed by nonprofit organizations, and must stay in use as seasonal farmworker housing for a minimum of 25 years.

Approximately 4,057 beds created through the Infrastructure Loan Program, which provides zero-interest deferred loans to growers for infrastructure improvements in support of on-farm housing. Growers are required to provide a dollar-for-dollar match toward the total cost of a project and must keep the site in use as licensed temporary worker housing for at least 15 years.

A total of 1,095 beds created through capital and operating assistance to migrant camps, including Esperanza in Mattawa, East Oroville Harvest Park in Oroville, Monitor Park near Wenatchee, and the Pangborn Cherry Harvest Camp in East Wenatchee.

A total of 1,722 beds* have been provided through the Rent-a-Tent program. Created in 2000, the program leases OSHA-approved tents to growers to provide on-farm housing during the labor-intense cherry harvest. Growers must ensure sites meet all state licensing standards.

*1,722 is the total number of beds made available through Rent-a-Tent. When adjusted for duplication, due to tents rented to some of the migrant camps and infrastructure projects, the unduplicated number of beds created is 511.

Emergency Housing Assistance

Through a contract with the Washington Department of Health, CTED makes emergency housing vouchers available to migrant workers who are displaced from their homes due to unsafe living situations. Vouchers are used to provide up to ten days of emergency shelter at licensed facilities, shelters, and motels. In addition to voucher assistance, CTED provides operating support to local service providers for the coordination of emergency services during peak harvest periods.

4. Partnerships

Numerous partnerships have been established at the state and local level to address the complex issues surrounding the development of farmworker housing. Ongoing cooperation between the key agencies involved in farm labor issues, including the Departments of Agriculture, Employment Security, Health, and Labor and Industries, was identified as being critical to developing a coordinated approach to the needs of the agriculture industry and farmworkers and implementing programs and services at the local level. Cooperation occurs in a number of ways, including planning meetings between state agency staff, both pre- and post-harvest; regular conference calls between state agencies and representatives of the agriculture industry during harvest season; and agency participation in state and local work groups. CTED also seeks guidance from the Governor’s Affordable Housing Advisory Board regarding priorities for the investment of state funds in farmworker housing. These types of collaborative efforts provide an opportunity for state and local governments, housing developers, service providers, farmworker advocates, local industry representatives, and other stakeholders to work together to identify issues, develop strategies to address them, and implement programs and projects that are responsive to the needs of both farmworkers and the local agriculture industry.

5. Challenges

The development of farmworker housing is uniquely challenging for a number of reasons. Some of the key impediments identified by government officials in Washington State include:

Lack of funding for ongoing operation and maintenance of seasonal housing

Seasonally-occupied housing, by its nature, is not cost-effective. Worker's low incomes and the fact that the housing is occupied only part of the year lead to rental revenues that are not sufficient to support ongoing operating costs. Significant rental and operating subsidies are needed in order for community-based organizations to be able to develop and sustain seasonal housing projects, but these resources are extremely limited.

Lack of infrastructure and available land

The areas most in need of farmworker housing are often areas that are also hardest to develop. The lack of available land and community infrastructure in rural areas can significantly increase the amount of money needed to develop a project. Local zoning and permitting regulations, as well as inconsistent interpretations of state regulations, can also be a barrier.

Lack of community support

Many areas continue to face local opposition to the development of farmworker housing, particularly seasonal housing, making it difficult to obtain the support necessary from local governments to move a project forward. Housing providers must sometimes incur substantial legal expenses to defend projects at the local level.

Lack of local developer capacity

Many organizations lack the specialized knowledge or level of commitment needed to develop and manage farmworker housing projects over the long term. Additional means are needed in order to sustain and increase the development of new projects.

Uncertainty in the agriculture industry

Many variables exist that impact the employment needs of the agricultural industry. This, in turn, impacts the demand for farmworker housing. Issues like immigration reform and changing global markets are cause for a great deal of uncertainty. While growers increasingly express concern regarding labor shortages and a need for housing to attract workers, many are hesitant to invest in housing due to uncertainties associated with the agricultural industry.

Lack of data

There is little data available that accurately identifies the number of farmworkers within the state, how much housing is currently available or how much additional housing and what types of housing are needed. More current, reliable data would enable the state to be more strategic in targeting limited resources and to better evaluate the impact of its investments.

Oregon

1. State Profile

a. Top Crop Items per Acre - Source: *USDA Census of Agriculture 2007*

- Forage – land used for hay and haylage, grass silage and green chop
- Wheat for grain all
- Vegetables harvested for sale
- Cut Christmas trees

b. Statewide Farm Statistics– Source: *USDA Census of Agriculture 2007*

- Number of farms – 38,553
- Land in farms – 16,399,647 acres
- Average farm size – 425 acres

c. Number of Farmworker Housing Units and Beds – Sources: *Oregon Housing and Community Services Website; Housing 2001-2004 Farmworker Housing Development and Finance Manual – 2004; CASA of Oregon*

- Permanent Housing – (Farmworker designated USDA, HOME and LIHTC) 1058 Units
- OHCS Licensed Farm Labor Housing through 2004 – 356 Camps - 11,916 Beds

d. Peak growing season – July – October

e. Migrant and Seasonal Farmworkers and Non-Farmworkers - Oregon

Type of Worker	Farmworker	Non-Farmworker	Total Farmworker and Non-farmworker
Migrant	39,900	14,232	54,132
Seasonal	63,554	56,799	120,353
Total All	103,454	71,031	174,485

Source: Migrant and Seasonal Farmworker Enumeration Profiles Study – Oregon September 2002

2. State and Local Programs

According to information obtained from the Oregon Housing and Community Service's website the following programs are administered by OHCS with regard to the development of farmworker housing in the state.

Oregon Farmworker Housing Development Tax Credit Program (FHTC)

The Farmworker Housing Tax Credit Program is designed to give a state income tax credit to investors and is available to anyone incurring costs to construct, install, acquire or rehabilitate farmworker housing. The tax credit may be taken on 50 percent of the eligible costs actually paid or incurred to complete a farmworker housing project. The total eligible cost for all approved projects for each calendar year is $7.25 million. Application is made directly to Oregon Housing and Community Services and there is no deadline for application. Farmworker Housing Tax Credits are issued on a first to apply first funded basis until funding allocation is exhausted.

Only the amount paid for "eligible costs" can be included in calculating the tax credit. Eligible costs were identified as costs directly associated with the acquisition, construction, installation or rehabilitation of seasonal or year-round farmworker housing, on farm or in town. Capital expenditures for rehabilitation of existing housing and also the purchase and installation of new manufactured housing are eligible. Routine maintenance expenses and the cost of buying land do not qualify. In a multi-unit dwelling, not all units need to be farmworker housing, provided that the tax credit is apportioned according to the percentage of units that are farmworker housing and provided that a fixed group of units is so identified.

Low-Income Housing Tax Credit Program (set aside for farmworker/ex-offender housing

Oregon Housing and Community Services administers the LIHTC program and priority is given to farmworker housing projects. The amount of LIHTC available is based on a per capita formula applied to each state as determined annually by federal government. OHFC awards tax credits in the fall Consolidated Funding Cycle application process. Of the total, 15% is reserved for projects serving farmworkers as well as preservation projects and housing serving ex-offenders. The use of LIHTC leveraged with other farmworker programs has been an effective development tool.

Oregon Farmworker Housing Development Account

Through the Migrant Housing Program, OHCS partners with the Oregon Department of Corrections to offer growers throughout Oregon an effective housing solution that allows inmates to use skills they have learned in the Construction Trades Program at the Snake River Correctional Institution. Inmates construct modular homes on site at the correctional facility. The completely furnished homes involve the inmates in all phases of residential construction. Oregon Housing and Community Services offers grants up to $30,000 per modular housing unit and tax credits to qualified buyers, making these homes very affordable.

Eligibility is open to growers as well as for-profit and nonprofit organizations.

Oregon Rural Rehabilitation Loan Program

The Oregon Rural Rehabilitation (ORR) Loan Program is exclusively for farmworker housing. The program was originally funded with a transfer of funds from the Oregon Division of State Lands. (The original funds were provided through the Secretary of Agriculture and designed to carry out the Bankhead-Jones Farm Tenant Act for the purpose of developing and/or preserving farmworker housing).

ORR loan funds are available to qualified for-profit, nonprofit and governmental organizations and are exclusively available for use on farmworker housing projects. ORR funds are required to be leveraged with other funding sources. Development can be either new construction or acquisition/rehabilitation of rental housing with a minimum of 2 units and under some circumstances multiple home ownership subdivision may be eligible. Projects must meet affordability requirements. The maximum loan request is $100,000 or 35% of the total project cost (whichever is less); with the maximum term being ten years. Interest rates on these loans are fixed for the term of the loan at 1%. Early repayment is encouraged as the availability of funds is dependent on the number and size of other outstanding loans at the time of application. All loan requests are taken on a first come, first funded basis and based on if the project qualifies and is ready to proceed.

Migrant Million Program

In 1999 The Oregon Legislative Assembly allocated $1 million through SB 5511 to the Emergency Board "for migrant housing." Oregon Housing and Community Services (OHCS) was tasked with administering this "Migrant Million." The funds were made available through a Request for Proposal (RFP) process, in either grant or loan form, for entities developing or rehabilitating affordable housing designed specifically to serve a migrant farmworker population. Housing could be on or off-farm, mobile or fixed, and for entirely migrant workers or for a mix of temporary and permanent residents. The following project objectives also had to be fulfilled.

- Continue to house migrant agricultural laborer populations for at least 10 years
- Have rents (including tenant paid utilities) less than or equal to 30 percent of the migrant worker's gross monthly income
- Maintain applicable building code, health and habitability standards
- Limit residency to a maximum of nine months by any tenant household

Currently, there are no funds available for this program. OHCS administered all available funds within one year of receipt of the funding. This program generated thirteen projects and 301 farmworker housing units.

Farmworker Housing Development and Financing Manual

The Farmworker Housing Development and Financing Manual 2004 prepared for Oregon Housing and Community Services by CASA of Oregon provides step by step farmworker housing development instructions with regard to the financing, the development process and management as well as specific program and contact information.

Farmworker Housing Development Corporation

The Farmworker Housing Development Corporation is a community-based non-profit organization dedicated to serving farmworkers and their families in Polk and Marion counties in Oregon. Over the past 16 years through the use of CDBG block grants, LIHTC, HOME funds, donations and volunteer assistance, they now provide housing to almost 200 families in the area.

3. Program Results

Permanent (Year Round) Housing

Farmworker designated USDA, HOME and LIHTC housing developed between 1991 and 2004 totaled 817 units.

Seasonal Housing

Between 2001 and 2004 seasonal licensed Oregon Farmworker housing increased from 305 facilities to 356 facilities adding an additional 255 beds.

Source: 2004 State and County Chart of Agricultural Labor Housing (ALH) Information

4. Partnerships

Nonprofit organization such as the Farmworker Housing Development Corporation, Catholic Charities and CASA of Oregon in partnership with state agencies such as Oregon Housing Community Services and the Oregon Department of Revenue, as well as local communities, have provided necessary support and funding for the development of farmworker housing in Oregon.

5. Challenges

According to information obtained from the *Farmworker Housing Development and Finance Manual 2004* prepared for Oregon Housing and Community Services by CASA of Oregon (a statewide nonprofit organization focused on the development and operation of safe, affordable farmworker housing resources); the following provides a somewhat different take on obstacles to farmworker housing addressed from the point of view of a farmworkers difficulty in finding decent housing.

Obstacles to finding decent housing

While housing markets throughout Oregon experience increasing costs to rent or purchase a home, the problem is magnified for farmworkers who also face unique obstacles when searching for decent housing. Anyone taking on the challenge of developing farmworker housing must be acutely aware of these factors.

- **Language**. Farmworkers in Oregon come primarily from other countries (principally Mexico and the countries of Central America) and their first language is Spanish. Adults who speak no English head many farmworker households. The consequences of this are obvious, resulting in an inability to communicate with property managers about the availability, terms and cost of housing. Conversely, advertising and promotion of market rate rentals are not presented in Spanish. However, property owners and managers are increasingly learning the value of outreach to the growing Spanish-speaking community as well as the need for staff fluent in Spanish.

- **Cultural Differences**. Farmworkers moving to Oregon may not be accustomed to the methods and procedures to secure a rental. The amount of paperwork, questions asked and fees charged can be daunting for anyone, let alone a family recently arrived from another country. Business transactions may seem abrupt and lacking the social graces that Latino culture values. Non-Latinos may inadvertently offend by asking an English-speaking child to translate for a head of household.

- **Very Low Incomes**. Farmworkers generally have incomes below 50% of median income. Finding decent market rate housing at this income level is difficult if not impossible.

- **Substandard and Overcrowded Housing**. With very low incomes, farmworkers and their families are forced to find whatever housing they can. The horror stories are familiar; run-down apartments, overcrowded conditions, families forced to share limited housing, and families living in shacks, barns, outdated trailers or camping along riverbanks or in orchards.

- **Rentals of Large Families**. For families with six to eight members, finding an apartment is difficult because there are generally very few if any available large units in a market area. The only rentals available are usually single-family houses that are relatively expensive.

- **Migrant Families**. Housing for migrant farmworkers has traditionally been bunkhouses or dormitory style buildings for single male laborers. On-farm housing was not designed to accommodate families, especially families with children.

- **Management Practices**. Property managers and landlords will require applicants to have employment and references. For farmworker families, particularly those just settling permanently in the area, their work histories are from other areas, work may have been seasonal and their rental history may include labor camps and frequent moves. For landlords with set criteria and an unwillingness to consider their information, finding a rental will be next to impossible.

- **Eligibility Criteria**. Programs supporting housing specifically for farmworkers impose eligibility criteria on residents. Meeting the criteria may require documentation that a farmworker may not possess. Families may avoid affordable housing because they may believe that other agencies will have access to resident records and fear reprisals regardless of their legal status.

- **Discrimination**. It's illegal, but racism is still a huge factor. While race may be the most obvious form of discrimination, farmworker families are also victims of discrimination based on familial status.

Florida

1. State Profile

a. Top Crop Items per Acre - Source: *USDA Census of Agriculture 2007*

- Oranges, all
- Sugarcane for sugar
- Forage – land used for all hay and haylage, grass silage and green chop
- Vegetables harvested for sale
- Peanuts for nuts

b. Statewide Farm Statistics – Source: *USDA Census of Agriculture 2007*

- Number of farms – 47,463
- Land in farms – 9,231,570 acres
- Average farm size – 195 acres

c. Number of Farmworker Housing Units and Beds – Source: *The Need for Farmworker Housing in Florida – July 2010; prepared for Florida Housing Finance Corporation by Anne Ray; Shimberg Center for Affordable Housing University of Florida*

- Florida Department of Health Permitted Camps – Total Capacity 33,409
- USDA RD and Florida Multifamily Housing – Total Units 7,567 Total Capacity 30,268*

*Based on an estimate of 4 people per unit

d. Peak growing season – September to June

e. Migrant and Seasonal Farmworkers and Non-Farmworkers

Type of Worker	Unaccompanied Worker Households	Accompanied Worker Households	Total Households	Unaccompanied Worker Households Members	Accompanied Worker Household Members	Total Household Members
Migrant	32,658	6,059	38,717	32,658	21,752	54,410
Seasonal	31,219	30,304	61,523	31,219	116,369	147,588
Total	63,877	36,363	100,240	63,877	138,121	201,998

Sources: Shimberg Center University of Florida, *The Need for Farmworker Housing in Florida, July 2010;*

2. State and Local Programs

The following programs are administered by FHFC and are available for the development of farmworker housing. However, unlike programs in California and Washington, none are designed exclusively for farmworker housing. While some have set-asides or give priority for farmworker development, many do not.

State Apartment Incentive Loan Program (SAIL)

The SAIL program provided low-interest loans on a competitive basis to developers of affordable multifamily rental housing. Funding is supplementary to primary financing and serves to bridge the gap between it and the total cost of the development. The loan is limited to 25% of the project cost and can be used in conjunction with other federal and state programs. Eligible applicants include individuals, public entities, and non-profit and for-profit organizations that propose to construct or rehabilitate multifamily housing available to very low-income households. There is a 10% set-aside for farmworker and commercial fishing worker housing developments. Traditionally, applications have been accepted through FHFC's Universal Funding Cycle.

SAIL funds are currently unavailable. According to a representative of FHFC, there has been no appropriation from the state legislature for several years. Occasionally, when SAIL loans are paid back, the program is able to generate a small pool of funds, which it makes available through an RFP process. To date, there have been no RFPs specifically targeting farmworker housing developments.

Low Income Housing Tax Credit Program

The LIHTC program provides non-profit and for-profit applicants with equity based on a dollar-for-dollar reduction in federal tax liability for investors, in exchange for the acquisition and redevelopment or new construction of affordable rental housing units. Funding is determined on a competitive basis through FHFC's Universal Funding Cycle.

According to a representative with the FHFC, for the first time this year, the Qualified Allocation Plan (QAP) does not include a set-aside for farmworker and commercial fishing worker housing developments. Set-asides in the current QAP are for projects in the Florida Keys; projects that target the elderly, homeless, and families; RD-538 projects; HOPE VI projects; and preservation projects. As there was no Universal Funding Cycle in 2010, 2009 was the last year in which special consideration was given to projects targeting farmworkers and commercial fishing workers.

HOME Investment Partnerships

Funded by HUD, the HOME program provides non-amortizing, low-interest loans to developers of affordable housing who acquire, rehabilitate, or construct housing for low-income families. Loans are offered at a simple interest rate of zero percent for non-profits and 1.5% for for-profit applicants. Terms are typically 15 years for rehabilitation and 20 years for new construction projects. Funding is determined through the Universal Funding Cycle, as well as Requests for Proposals.

Currently there are no HOME funds available for the Universal Funding Cycle, except for projects targeting the homeless. Also, there is no set-aside for farmworker housing. HOME funding for farmworker housing developments are determined through an RFP process and 2005 was the last year in which an RFP for "migrant worker" housing was issued.

Multifamily Mortgage Revenue Bonds (MMRB)

The MMRB program uses proceeds from the sale of taxable and tax-exempt bonds to provide below-market loans to non-profit and for-profit multifamily developers who set aside a portion of their apartment units for low-income families. Funding is typically reserved for new construction and rehabilitation projects with 200 or more units. Applications are generally reviewed during the Universal Funding Cycle (see note below).

According to a FHFC representative, there is no allocation for MMRB in the current Universal Funding Cycle. As such, FHFC is holding a supplementary, non-competitive cycle for MMRB funds using the 2011 Universal Application as a basis. Currently, there are no set-asides for farmworker housing. Per Mr. Woodward, the only set-asides are for projects targeting low-income households and for projects located in special district. Special districts include DDAs (i.e., Difficult to Development Areas) and QCTs (i.e., Qualified Census Tracts).

Predevelopment Loan Program (PLP)

The PLP is available to non-profit and community-based organizations, local governments, and public housing authorities. Loans of up to $750,000 cover predevelopment activities associated with the development of affordable housing. Covered activities include rezoning, title searches, legal fees, impact fees, administrative costs, soil tests, engineering fees, appraisals, feasibility analyses, audit fees, earnest money deposits, insurance fees, commitment fees, marketing expenses, and, in some cases, land acquisition. Loans are non-amortizing with an interest rate of 1% for non-profits having a 100% ownership interest in the project and 3% for non-profits having shared interests with for-profit partners. Loans have a maximum term of three years and are due upon closing of construction or permanent financing. Funding is available on a first-come, first-serve basis and priority is given to developments with a minimum of 40% of units set aside for farmworkers.

While priority is given to farmworker housing developments, a representative noted that funding has been sufficient to support all eligible PLP loan applications. Depending on the state of the market and funding availability, FHFC typically funds five to 20 loans per year. In 2011, five or six will have been funded by year-end. Due to weakness in the single family for-sale housing market, most applications are currently for multifamily rental developments.

Farmworker Housing Recovery Program (FHRP)

In response to destruction caused by hurricanes in 2004 and 2005, the state legislature allocated funds for several Hurricane Housing Recovery Programs. One was the Farmworker Housing Recovery Program and in 2006, $15 million was appropriated to fund the program. While the program is no longer being administered by FHFC, it provided financing for the construction and rehabilitation of smaller rental developments for farmworkers. Special consideration was given to projects targeting migrant farmworkers and funds were awarded on a competitive basis to non-profits, public housing authorities, and other housing providers. To mitigate development costs, partnerships were encouraged among non-profits, farmers, growers, local governments, and trade associations.

3. **Program Results**

Specific program data results were not available, however the State of Florida has experienced a substantial increase in the number of both subsidized multifamily housing units and Florida Department of Health permitted farmworker camp capacity.

In the past, the Florida Housing and Finance Corporation had allocated some of its SAIL, HOME and LIHTC funding to farmworker designated multifamily development. This in conjunction with USDA Rural Development 514/516 programs that subsidize farmworker housing as well as other programs previously identified may account for the increase in farmworker housing units. As reported in the University of Florida Shimberg Center study; *The Need for Farmworker Housing in Florida July 2010*, between 2007 and 2010 there was an 18% increase in the number of multifamily housing units from 6,401 units to 7,567 units.

During that same time frame the Florida Department of Health permitted camps that house unaccompanied migrant and seasonal farmworkers increased by 21% from a capacity of 27,591(individuals that can be housed) in 2007 to 33,409 in 2010.

4. **Partnerships**

The State Housing Initiatives Partnership Program (SHIP) provides funds to local governments as an incentive to create partnerships that produce and preserve affordable homeownership and multifamily housing. The program was designed to provide very low, low and moderate income families with assistance to purchase a home, money to repair or replace a home, and many other types of housing assistance.

5. **Challenges**

According to the 2002 study by the University of Florida entitled *Stakeholder Analysis of Farmworker Housing in Florida*, in interviews with stakeholders, all mentioned issues related to the amount of funding available and the way funding is made available. The consensus was that the high level of bureaucracy in the application stage made the process prohibitive. Some stakeholders believed that the state provided relatively little funding for housing compared to federal sources. Housing providers and service providers agreed that another obstacle to building subsidized housing for farmworkers was NIMBYism - the lack of mainstream community support for such housing. The need for local government support in areas with high farmworker populations also can present a challenge.

California

1. State Profile

a. Top Crop Items per Acre - source: *USDA Census of Agriculture 2007*

- Forage – land used for hay and haylage, grass silage, green chop
- Vegetables harvested for sale
- Grapes
- Almonds
- Rice

b. Farms – source: *USDA Census of Agriculture 2007*

- Number of farms – 81,033
- Land in farms – 25,364,695
- Average farm size – 313 acres

c. Peak growing season – March to November

d. Migrant and Seasonal Farmworkers and Non-Farmworkers

	Farmworker	Non-Farmworker	Total Farmworker and Non-Farmworker
Migrant	338,798	124,508	481,306
Seasonal	392,947	445,897	838,844
Total All	731,745	570,405	1,302,150

Source: *Migrant and Seasonal Farmworker Enumeration Profiles Study – California; September 2000; Alice C. Larson PhD*

2. State and Local Programs

Joe Serna, Jr. Farmworker Housing Grant (JSJFWHG) Program
California Department of Housing & Community Development

The JSJFWHG Program provides financing for new construction, rehabilitation, and acquisition of owner-occupied and rental housing units for agricultural workers. A match of 100% or more is required. Through the JSJFWHG Program, the Department of Housing & Community Development issues "Homeowner Grants" (for new construction or rehabilitation), "Rental Construction Grants or Loans," and "Rental Rehabilitation Grants or Loans." Lien restrictions are 40 years for rental construction grants or loans and 20 years for both homeowner grants and rental rehabilitation grants or loans. For the two rental categories, loans may be made in conjunction with low income tax credit financing only. Priority is given to projects targeting lower-income households.

Eligible development activities include land acquisition, site development, construction, rehabilitation, design, operations and replacement reserves, repayment of predevelopment loans, provisions of access for the elderly or disabled, relocation, and homeowner counseling.

Eligible applicants include local government, nonprofits, cooperative housing corporations, limited partnerships where all general partners are nonprofit mutual or public benefit corporations, and federally recognized Indian tribes.

Predevelopment Loan Program
California Department of Housing & Community Development

Through its Predevelopment Loan Program, the Department of Housing & Community Development provides predevelopment capital, in the form of short-term loans, to finance the start of low-income housing projects. Terms are three percent simple annual interest loans for up to two years and the maximum loan amount for purposes other than site option or purchase is $100,000.

Priority is given to developments that are rural, located in public transit corridors, or preserve and acquire existing government-assisted rental housing at risk of conversion to market rents.

Eligible predevelopment activities include site control, site acquisition, engineering studies, architectural plans, application fees, legal services, permits, bonding, and site preparation.

Eligible applicants include local governments, nonprofits, cooperative housing corporations, limited partnerships or LLCs where all general partners are nonprofit mutual or public benefit corporations.

Applicants are accepted on a continuous basis as funds are available.

Office of Migrant Services
California Department of Housing & Community Development

The goal of the Department of Housing and Community Development's Office of Migrant Services is to provide safe, decent, and affordable seasonal rental housing, as well as support services, for migrant farmworker families during the peak harvest season. HCD obtains and administers funds for the construction and rebuilding of migrant centers at which point they own the structure. In return, counties, housing authorities, and grower associations typically provide land for the centers as an in-kind contribution. HCD also offers grants for center operations.

Eligible applicants include local governments, housing authorities, nonprofits, school districts, and health agencies.

Funds to operate, maintain, and rehabilitate existing centers are budgeted and contracted annually.

California Tax Credit Allocation Committee

Until recently, the TCAC administered a Farmworker Housing Assistance Tax Credit Program; however, it was replaced with an annual set-aside of state LIHTCs for farmworker housing developments. The annual state Farmworker Credit for farmworker housing is $500,000 (plus any returned and unused state Farmworker Credit balance from the previous calendar year). Typically, state Tax Credit recipients must also have been awarded federal Tax Credits; however, recipients of state Farmworker Credits are exempt from this requirement.

Separately, under California law, the TCAC must set aside 20% of the Federal Credit Ceiling for projects located in rural areas. Also, 14% of the rural set-aside must be made available for new construction projects with a funding commitment of at least $1 million from Rural Housing Service's Section 514 (for farmworker housing) or 515 (for rural rental housing) loan programs.

Rural Community Assistance Corporation.

The RCAC is a nonprofit organization that provides technical assistance, training, and financing for rural communities. Assistance is offered for environmental infrastructure, affordable housing development, economic and leadership development, and community development finance. RCAC covers a 13-state region and provides services to communities with 50,000 or fewer residents, as well as to tribal communities.

Through its Loan Fund, RCAC partners with other financial institutions to fill the financing gaps of developing affordable housing, environmental infrastructure, and community facilities in rural locations. All projects financed by RCAC must provide a public benefit (e.g., serving low and very low-income people).

In RCAC's fiscal year 2011, it closed 39 loans totaling $23 million in ten states. It supported nearly 5,000 individual water and wastewater connections for rural households, 460 housing units, and more than 50,000 feet of community space.

3. **Program Results**

As cited in numerous reports, data on the total number of farmworker designated housing units within the state of California is not currently available nor has specific data been tracked with regard to the increase of housing units generated by state or local programs. However some relatively recent data does exist with regard to the Office of Migrant Services Migrant Family Housing Centers. As of 2008 there were 25 Migrant Family Housing Centers in 16 counties with a total of 1962 units of single-family housing. These centers offer decent, safe and affordable seasonal housing and support services for migrant farmworkers during the peak harvest season.

4. **Partnerships**

Napa Valley California vintners and growers along with state and local officials, and farmworker advocates partnered to help ease the housing shortage issue for local farmworkers. In 2003 a $3.4 million 60 bed farmworker housing project, the River Ranch Center, was opened. In addition to the two dormitory style housing units a multi-purpose room and athletic field were also constructed.

The Napa Valley Vintners (NVV) worked closely with elected officials to introduce and pass state legislation to allow Napa vintners to implement a permanent, mandatory tax of up to $10 per acre on vineyard property - creating an ongoing pool of additional funds for farmworker housing programs managed by the County. Subsequently, a local county ballot initiative (Measure L) was introduced and passed to allow landowners to donate parcels of less than 40 acres if used exclusively for farmworker housing.

The County of Napa contributed $1,200,000, Napa Valley Vintners contributed $645,775 and the State of California's Joe Serna Jr. Farmworker Grant Program contributed $1,557,609 dollars to the Napa Valley Housing Authority for the construction of the River Ranch Center. The Napa Valley Housing Authority operates three additional farmworker facilities in Napa County, capable of housing 177 workers. With the opening of River Ranch, the total rises to 237 available slots. Workers pay $12.00 per day for the housing, which includes three meals per day, six days per week.

5. **Challenges**

According to an article by the Federal Reserve Bank of San Francisco entitled *Developing Farmworker Housing March 2007* there are several challenges to developing farmworker housing in the 12th District in California and in other regions in the state. One key barrier identified to providing affordable and adequate housing for California farmworkers is immigration status. The lack of legal immigration status can affect housing opportunities in a number of ways. The majority of farmworker housing developments are funded by the United States Department of Agriculture's (USDA) Rural Development Agency. Federally funded housing requires lease signers to be legal residents, shutting out many farmworkers in need. Housing providers have also found that unauthorized farmworkers may fear that accepting subsidized housing will bring them to the attention of immigration authorities.

A second barrier, and perhaps the most significant, is the gap between farmworker wages and housing prices, particularly in a high-cost real estate market like California. For some farmworkers, earning a low wage means deciding between housing and sending a significant portion of their earnings home to support their family. Exacerbating the problem is a lack of funding for farmworker housing projects. Since the 1960s, over $1 billion in federal funds have contributed to the development of farmworker housing projects across the country. Much of the current funding is spent on the maintenance of projects built 15 years ago, not on the development of new projects, despite advocates' efforts and requests for funding of new developments. As the number of farmworkers has increased, the gap between the supply and demand for housing has grown. In addition, construction costs have risen relative to the amount of funding available, which further limits the number of units that can be financed under existing subsidy programs.

Developers also face significant challenges in securing land for farmworker housing projects. In many of these areas, the price of land is unaffordable for 'affordable' housing." Zoning laws that restrict housing development can also contribute to the shortage of land. NIMBYism or "Not In My Back Yard" attitudes against farmworkers, low-wage workers, and immigrants can also derail projects and add to the costs of planning and construction.

B. RECOMMENDATIONS

The following is a summary of recommendations as they relate to policies, procedures and programs to implement or modify, in an effort to encourage and support the development of affordable housing for farmworkers in rural Texas. These recommendations should be considered as the bases for establishing a more developed set of programs and policies that ultimately work towards the possible establishment of a farmworker-specific housing program. It should be noted that many of the recommendations that are part of the Texas Rural Housing Analysis completed by Bowen National Research are applicable to the farmworker community, but are only cited in the recommendations below if there are farmworker-related components that require specific acknowledgement.

1.) **Modify and/or Clarify Farmworker Housing Facilities Compliance Requirements:** Some farmworker housing providers or potential providers of farmworker housing indicated that the lack of clarity of farmworker housing building and maintenance compliance requirements deterred them from development of such housing. All migrant and seasonal farmworker housing is subject to Federal building and maintenance regulations, while only those projects that are licensed by the Texas Department of Housing and Community Affairs (TDHCA) to house migrant farmworkers must comply with state regulations. As such, only the TDHCA licensed migrant labor housing projects have duel compliance requirements that do not always coincide with each other. Compliance provisions and development regulations should be modified to add consistency between Federal and state regulations and/or clarifications and guidance should be given to the development community as to the regulations that must be followed for migrant housing facilities. Consideration should also be given to better promote the resources for getting assistance and/or guidance on compliance issues. It should be noted that 19 projects were identified in the study areas that are licensed as migrant labor housing by the Texas Department of Housing and Community Affairs (TDHCA) and of which all would have the duel (Federal and state) compliance requirements.

2.) Consider Raising Development Standards to Enable Farmworker Projects to be Eligible for Low-Income Housing Tax Credits: Many typical farmworker housing projects/units do not meet the minimum design standards that would make them eligible for Low-Income Housing Tax Credits and, therefore, developers of farmworker housing cannot access financing through the Tax Credit program. It is recommended that developers of farmworker housing be encouraged to meet design standards for farmworker housing that would create housing units that meet the LIHTC program requirements.

3.) **Consider Providing Assistance and/or Creating Incentives to Encourage Developers to Actively Market Non-Farmworker Housing to Farmworkers:** Given that the existing housing stock in many rural counties has some capacity to accommodate additional renters, government entities should explore ways to assist and/or create incentives for developers of existing or planned non-farmworker housing to market their projects to farmworkers. This would help meet some farmworker housing needs without adding new units to markets.

4.) **Consider Establishing a Pre-Development Loan Program for Potential Rural Farmworker Housing Projects:** Consideration should be given to establishing a low interest loan program for providers of farmworker housing for predevelopment activity such as costs associated with rezoning, title searches, legal and audit fees, appraisals and market studies, insurance fees, and other various fees. Predevelopment loan programs that could serve as models are offered in California and Florida (see case studies).

5.) **Explore Funding Mechanisms for the Maintenance of Seasonally Occupied Migrant labor housing facilities:** Maintenance and code compliance for operators of Migrant labor housing facilities presents a challenge as many of these facilities are unoccupied for much of the year. Upkeep on these structures can be costly and along with the inherent uncertainties associated with the agriculture industry, these costs can become prohibitive. As noted in the best practices section of this report, other states and local communities have developed strategies to address this issue. For example, involvement of the community/region may assist in addressing this issue. As in the Napa Valley Model growers working in conjunction with the local housing authority, farmworker advocate groups as well as state and local government, partnered to provide a pool of funding administered by the housing authority to fund upkeep of seasonal farmworker housing. A program similar to this in Texas should be considered.

6.) **Explore Developing Rental/Operating Subsidies to Sustain Rural Farmworker Projects:** Operating farmworker housing projects in rural Texas is sometimes considered a risk in the development community due to the fluctuating occupancies due to the nature of the agricultural industry (seasonal work, migrant farmworkers, etc.) and the vulnerability this specific type of housing has to climatic changes, such as droughts. Consideration should be given to establishing rental and operating subsidies to help farmworker housing during periods of low occupancies.

7.) **Expand Education and Outreach Efforts to Public that Emphasizes Rural Farmworker Housing Development:** Common development barriers cited by stakeholders included the lack of information as to the specific housing needs of farmworkers by geographic area, the processes for developing farmworker housing, and the lack of acceptance of local communities to farmworker housing. Public sector education and outreach efforts should work to assist the development community in understanding farmworker housing needs and rural development nuances, and to help reduce apprehension some communities have to farmworker housing. Establishment of an information clearinghouse that focuses on farmworkers and farmworker housing development, and provides technical assistance, could be very beneficial to housing providers, particularly smaller, non-profit entities with limited staffing resources. Establishing a forum which brings farmworker stakeholders and public sectors together, either through regular meetings or an annual conference that specifically includes public sector entities and agriculture industry leaders should be considered. Finally, development of a farmworker development and financing manual/handbook similar to that developed in Oregon (see Oregon case study) should be considered.

8.) **Continue to Monitor Farmworker Mobility Patterns, Demographics, Agricultural Trends, and Housing Market Conditions:** Because of the unique nature of the farm labor workforce, it will be important to periodically monitor farm labor migration patterns and to survey the farmworker-designated housing stock for occupancy characteristics and trends. A re-evaluation of farmworker housing needs on a region and county level shortly after the completion of periodically released farmworker data (i.e. the 2012 Census of Agriculture that will be conducted in 2013) should be conducted on established intervals (every three years or five years are recommended).

9.) **Consolidate Housing Program Requirements and Coordinate Funding Timelines:** One of the barriers to development that was often cited during our research and interviews was that many developers must rely upon a variety of financing resources (i.e. USDA, TDHCA and HUD) to make projects financially feasible, yet each funding source has its own set of regulations and funding cycles, which are not coordinated with other agencies for easy use. Public funding entities need to consolidate their program regulations and coordinate their funding cycles to facilitate housing development and reduce the cost and time of compliance activities. In order to assist farmworker housing providers with securing federal funding through the USDA 514/516 program, early funding commitments from the LIHTC program, for example, would help housing providers to leverage various funding sources.

ADDENDUM A: SOURCES

A. SOURCES

- 2000 and 2010 U.S. Census
- ESRI Demographics
- U.S. Department of Labor, Bureau of Labor Statistics
- Management for each property included in the survey
- Local planning and building officials
- Local Housing Authority and finance agency representatives
- Regional Council of Government representatives
- Farm owners and agricultural representatives
- Local, regional and statewide housing developers
- Local, regional and statewide special needs advocates
- U.S. Department of Housing and Urban Development (HUD)
- USDA National Agriculture Statistics Service (NASS) 2002 Census of Agriculture
- Texas Department of Agriculture
- Texas AgriLife Extension Service/Texas A&M University
- Urban Decision Group
- Texas Migrant – Seasonal Farmworker Enumeration Profile (2000)
- NAWS 2005-2009
- 2000 MSFW Enumeration Profiles
- USDA 2007 Census of Agriculture
- "The Need for Farmworker Housing in Florida, July 2010" – University of Florida Shimberg Center
- Oregon Housing and Community Services Website; Housing 2001-2004
- "Farmworker Housing, Development and Finance Manual – 2004;" CASA *of* Oregon
- "Migrant and Seasonal Farmworker Enumeration Profiles Study – Oregon September 2002;" Alice C. Larson PhD
- "Migrant and Seasonal Farmworker Enumeration Profiles Study – Washington September 2000;" Alice C. Larson PhD
- "Farmworker Housing in Washington State: Progress to Date – December 2007"
- "Migrant and Seasonal Farmworker Enumeration Profiles Study – California September 2000;" Alice C. Larson PhD
- "Stakeholder Analysis of Farmworker Housing in Florida (2002);" University of Florida
- "Developing Farmworker Housing March 2007" – Federal Reserve Bank of San Francisco
- Realtor.com
- Realtytrac.com

ADDENDUM B: COMPANY QUALIFICATIONS

THE COMPANY

Bowen National Research employs an expert staff to ensure that each market study is of the utmost quality. Each staff member has hands-on experience evaluating sites and comparable properties, analyzing market characteristics and trends, and providing realistic recommendations and conclusions. The Bowen National Research staff has a combined 50 years of experience in studying housing markets.

THE STAFF

Patrick Bowen is the President of Bowen National Research. He has prepared and supervised thousands of market feasibility studies for all types of real estate products, including affordable family and senior housing, multifamily market-rate housing and student housing, for 14 years. He has also prepared various studies for submittal as part of HUD 221(d)(3) & (4), HUD 202 developments and applications for housing for Native Americans. Mr. Bowen has worked closely with many state and federal housing agencies to assist them with their market study guidelines. Mr. Bowen has his bachelor's degree in legal administration (with emphasis on business and law) from the University of West Florida.

Benjamin J. Braley, Market Analyst, has conducted on-site market evaluations for over four years in more than 200 markets. He has completed work in 37 states and tribal reservations throughout the U.S. Mr. Braley has analyzed apartments (subsidized, Tax Credit and upscale market-rate), senior housing (i.e. nursing homes, assisted living, etc.), student housing, condominiums, single-family homes and marina developments. In addition, he has studied retail, office and hotel markets. Mr. Braley has a bachelor's degree in Economics from Otterbein College.

Amy Tyrrell is a Market Analyst for Bowen National Research and is based out of Washington, DC. She has 16 years experience in the real estate and construction industries, with 11 years specializing in the research field. She has researched, analyzed, and prepared reports on a variety of trends, industries, and property types, including industrial, office, medical office, multifamily apartments and condominiums, and senior housing. Prior to her focus on research, Ms. Tyrrell performed financial analysis for retail developments throughout the United States. She holds a Masters in Business Administration with concentrations in real estate and marketing from the University of Cincinnati and a Bachelor of Arts in economics with a minor in mathematics from Smith College.

Christi Kramer is the Marketing Director at Bowen National Research. She has conducted qualitative and quantitative research in markets nationwide for apartments, student housing, condominiums, single-family, self-storage and retail developments. In addition, Ms. Kramer has been involved in the production of over 2,500 studies and is familiar with the guidelines and requirements of state housing agencies. She has a bachelor's degree in Marketing from the University of Dayton School of Business Administration where she was also the Marketing Assistant.

Stephanie Viren is the Research Director at Bowen National Research. Ms. Viren focuses on collecting detailed data concerning housing conditions in various markets throughout the United States. Ms. Viren has extensive interviewing skills and experience and also possesses the expertise necessary to conduct surveys of diverse pools of respondents regarding population and housing trends, housing marketability, economic development and other socioeconomic issues relative to the housing industry. Ms. Viren's professional specialty is condominium and senior housing research. Ms. Viren earned a Bachelor of Arts in Business Administration from Heidelberg College.

Jack Wiseman, a Market Analyst with Bowen National Research, has conducted extensive market research in over 200 markets throughout the United States. He provides thorough evaluation of site attributes, area competitors, market trends, economic characteristics and a wide range of issues impacting the viability of real estate development. He has evaluated market conditions for a variety of real estate alternatives, including affordable and market-rate apartments, retail and office establishments, educational facilities, marinas and a variety of senior residential alternatives. Mr. Wiseman has a Bachelor of Arts in Economics from Miami University.

Desireé Johnson is the Field Support Coordinator at Bowen National Research. Ms. Johnson is involved in the day-to-day management of the field support department, as well as preparing jobs for field and phone analysis. She has been involved in extensive market research in a variety of project types for more than five years. Ms. Johnson has the ability to research, find, analyze and manipulate data in a multitude of ways. Ms. Johnson has an Associate of Applied Science in Office Administration from Columbus State Community College.

Becky Musso is part of the research team at Bowen National Research. She has been involved in the research process for many jobs, but has specifically been skilled in the research of homeless, special needs and farmlabor data. Ms. Musso conducts a variety of interviews with local planning, economic development and stakeholder officials that are used in the analysis of each market.

June Davis, Office Manager of Bowen National Research, has 22 years experience in market feasibility research. Ms. Davis has overseen production on over 13,000 market studies for projects throughout the United States.