2015
APPALACHIAN GROWN™ PRODUCER SURVEY REPORT

March 2016

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EXECUTIVE SUMMARY

About the Appalachian Grown Program

ASAP's mission is to help local farms thrive, link farmers to markets and supporters, and build healthy communities through connections to local food. In our mission to support Southern Appalachian farms and build a local food system, ASAP developed the Appalachian Grown program in 2007 with the goals of expanding local markets by area farmers and providing a way for the public to easily identify products from local farms.

Appalachian Grown (AG) is a branding program for farms, tailgate markets, retailers, and wholesalers that certifies food and agricultural products grown or raised on farms in Western North Carolina and the Southern Appalachian Mountains. This region includes 60 Appalachian counties in North Carolina, Georgia, South Carolina, Tennessee, and Virginia. Appalachian Grown means Certified Local. Appalachian Grown is a trusted label that helps buyers and shoppers know when they are spending their dollars to the benefit of local family farms and communities. When consumers see the AG logo – at stores, restaurants, tailgates, and other businesses – they know they're buying fresher foods that support family farms, strengthen the local economy, preserve rural culture, and protect the region's natural beauty.

In 2015, 762 farms were Appalachian Grown certified.

The 2015 Appalachian Grown Producer Survey

Every year since the Appalachian Grown program was founded, a survey has been sent to all AG farms to help us understand the experiences of farmers, assess the impact of program services and support, and gather feedback to be used to shape the program's future direction.

In March 2016, this annual online survey was sent to the 711 AG certified producers for whom we had a valid email address. The survey opened March 9, 2016 and closed March 25, 2016. A total of **222** out of the 711 producers completed the survey, a response rate of **31%**.

This report contains the findings from the 2015 Appalachian Grown Producer Survey and a summary of selected survey results over the last three years.

KEY FINDINGS

Farmers and Farm Operations

- Appalachian Grown (AG) farmers are younger than the average farmer: 46% are younger than 55 compared to 38% nationally.[1]
- AG farmers are twice as likely to be beginning farmers than the average farmer: 54% of farmers have been farming for 10 years or less compared to the national average of 25%.[2]
- AG farmers are more likely to be women: 53% of AG farmers are women compared to 30% of farm principle operators nationally.[1]
- Average farm acreages in 2016 remained steady at 54.6 acres.
- AG farms come in all shapes and sizes: the number of farm acres in production (including grazing and foraging lands) range from 1/10 of an acre to 500 acres.

Farm Sales

- Farmers are using AG materials to brand their products: 47% of farmers' total sales were identified as AG (with labeling, boxes, twist ties, signage, etc.).
- Most farmers report that there are more market outlets available to them in 2015 compared to 2014: 53% indicated that they believe there are more market outlets to sell their farm products in 2015 than there were in 2014.
- Restaurants are the biggest area of increased sales: 29% reported that their sales to restaurants increased from 2014 to 2015.

Interactions with Customers

- Farmers are making changes to their growing practices based on feedback received from customers: 25% indicated that they have made changes such as growing different products based on customer preferences and using more sustainable growing practices.
- Farmers are making changes to the types of products that they offer based on feedback received from customers: 58% indicated that they have made changes.
- Customers want to know where the farm is located: farmers indicated that customers are most often asking about the location of the farm, the type(s) or variety of product(s) that are available, whether farmers grew the food that they are selling, and farmers' production/growing practices.

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[1] USDA NASS, 2012 Census of Agriculture. Retrieved from: https://www.agcensus.usda.gov/Publications/2012/Online_Resources/Highlights/Farm_Demographics/.5

[2] USDA NASS, 2012 Census of Agriculture. Retrieved from: https://www.agcensus.usda.gov/Publications/2012/Online_Resources/Highlights/Beginning_Farmers/.

Challenges Farmers Are Facing

- The top three challenges identified by farmers are: 1) the need to educate consumers on topics including the benefits of buying local products, the true cost of farming, and the seasonality of products available 2) determining a fair price for products and 3) competition with other growers.
- Farmers are challenged by the time it takes to produce, market, sell, and distribute/transport their products and by the high cost of farming.

Strategies Farmers Are Using to Address Challenges

- Farmers value building and maintaining relationships with buyers/customers: 80% indicated that this is a high priority for addressing the challenges that they face.
- Farmers promote the healthfulness of their products: 73% indicated that this is a high priority.
- Farmers are committed to selling their products in multiple market outlets: 50% indicated that this is a high priority.

Value of Appalachian Grown Services

- Farmers rank the cost share program as the most valuable service that ASAP provides: 91% who have participated in the cost share program indicated that it is very valuable or valuable.

Importance of Appalachian Grown Promotional Materials

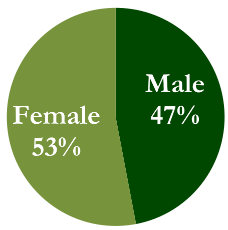
- Farmers consider AG promotional materials to be very important in helping to increase sales: 85% who have used the AG logo indicated that it is very important or important.
- Farmers report that the Local Food Guide is important for increasing farm sales: 82% who have used the Local Food Guide indicated that it is very important or important.

SUMMARY OF KEY FINDINGS OVER THE LAST 3 YEARS

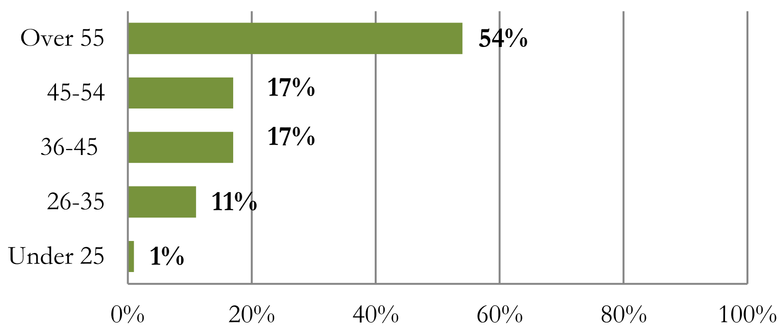
	2013	2014	2015
Farmers and Farm Operations			
% of respondents who have been farming for 10 years or less	Not available	**52%** n=230	**53.5%** n=209
% of respondents who fit the USDA's definition of a limited resource farm	**61%** n=203	**40%** n=230	**38%** n=210
% of respondents currently growing or have grown tobacco	**17%** n=225	**14%** n=249	**15%** n=187
% of respondents who are former tobacco quota holders	**17%** n=225	**16%** n=249	**18%** n=187
% of respondents growing on former tobacco land	**29%** n=223	**22%** n=249	**30%** n=186
Average farm acreage	**54.6** n=210	**53.6** n=227	**54.6** n=200
Average # of farm acres in production (including grazing and foraging lands)	**27.9** n=201	**30.5** n=222	**37.88** n=188
Farm Sales			
% of respondents who indicated that there are fewer market outlets available in the current year than in the previous year	**5%** n=218	**5%** n=234	**4%** n=212
Average % of respondents' sales that were sold to local markets (within approximately 100 miles of Asheville)	**77%** n=166	**81%** n=191	**77%** n=186
Interactions With Customers			
% of respondents who reported that their customers specifically asked for AG certified products	**28%** n=227	**20%** n=255	**68%** n=218

OVERVIEW OF SURVEY RESPONDENTS

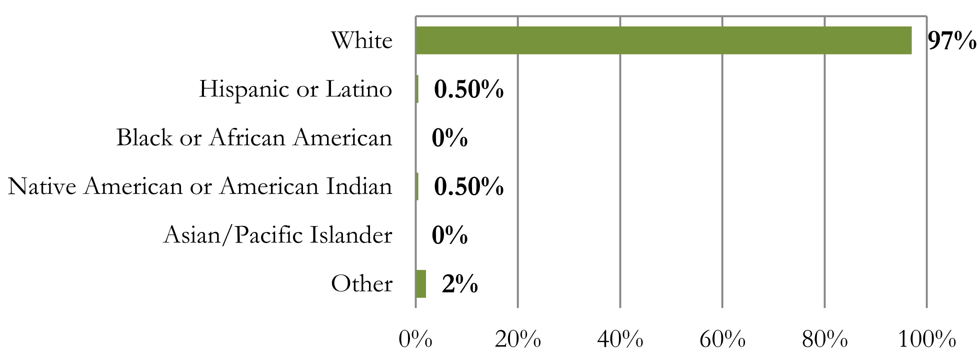
Gender
(n=181)



Age
(n=185)



Race/Ethnicity
(n=184)



Farm Location

(n=202)

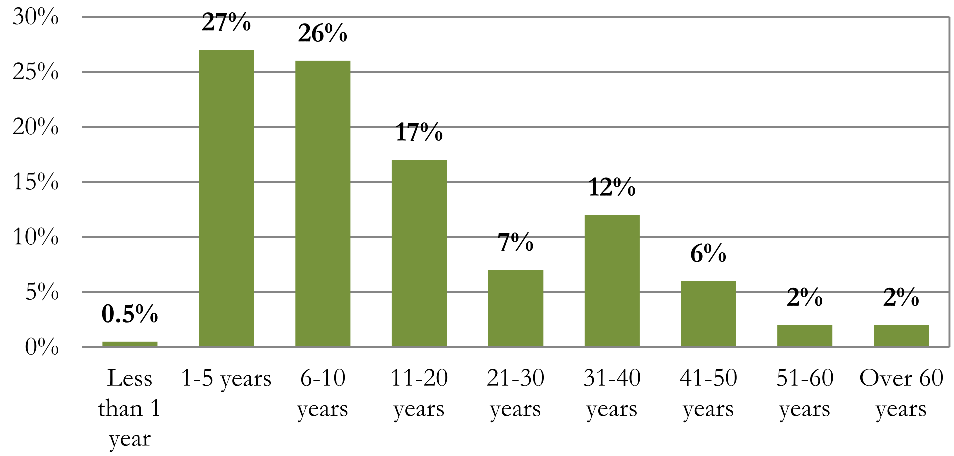
County	n
Alleghany	2
Anderson	1
Ashe	11
Avery	8
Blount	1
Buncombe	34
Burke	4
Caldwell	2
Carter	1
Cherokee	4
Clay	3
Fannin	1
Graham	4
Hawkins	1
Haywood	15
Henderson	19
Jackson	4
Jefferson	1
Knox	4

County	n
Macon	7
Madison	16
McDowell	6
Mitchell	2
Oconee	2
Pickens	4
Polk	5
Rabun	2
Rutherford	5
Spartanburg	1
Swain	3
Transylvania	7
Washington	2
Watauga	13
Wilkes	2
Wythe	2
Yancey	8

FINDINGS

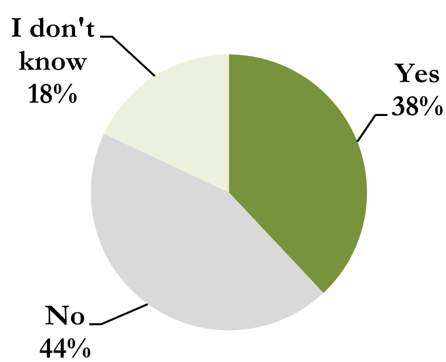
Farms and Farm Operations

54% of farmers have been farming for 10 years or less (n=209)

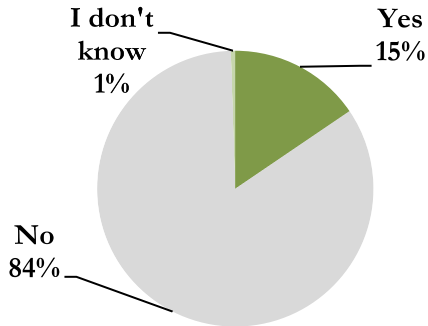


38% of farmers fit the definition of a Limited Resource Farm (n=210)

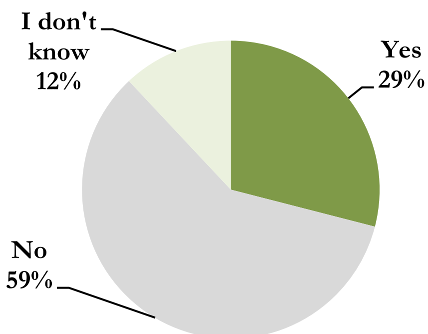
A Limited Resource Farmer, Rancher, or Forest Owner is a person with direct or indirect gross farm sales not more than $173,600 (for FY 2016) in each of the previous two years AND a person with a total household income at or below the national poverty level for a family of four ($24,250) or less than 50% of county median household income in each of the previous two years.



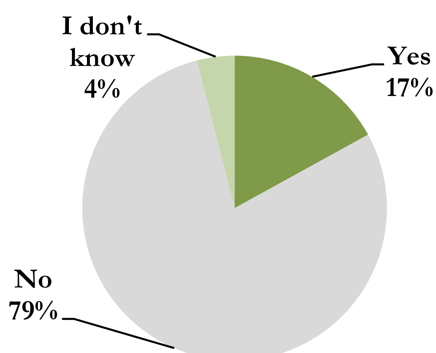
15% of farmers are growing or have ever grown tobacco (n=187)



29% of farmers are growing on former tobacco land (n=186)

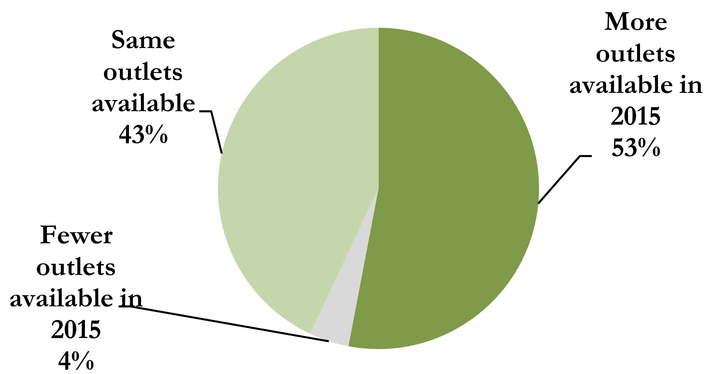


17% of farmers are former tobacco quota holders (n=187)

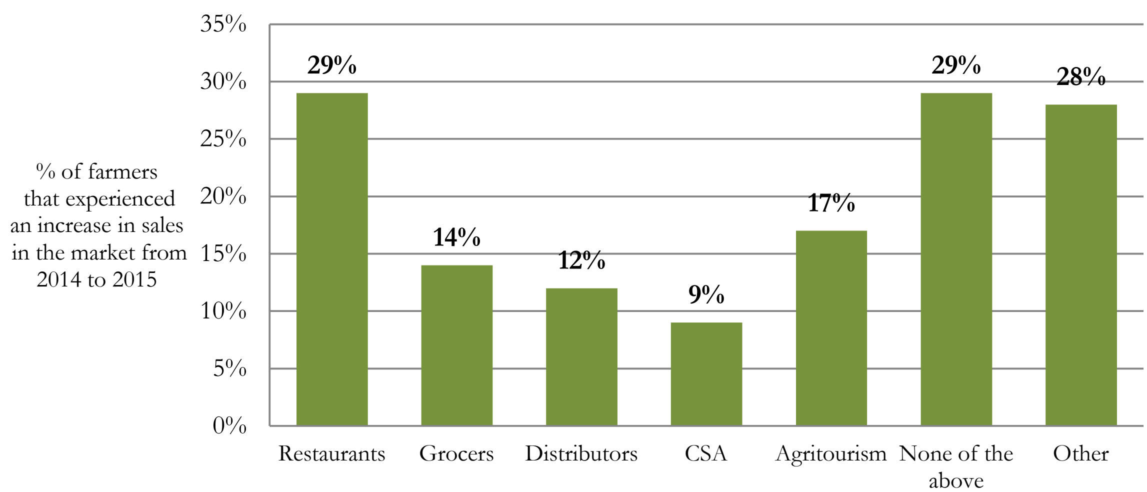


Farm Sales

53% **of farmers believe there are more market outlets to sell their products in 2015 than in 2014** (n=212)



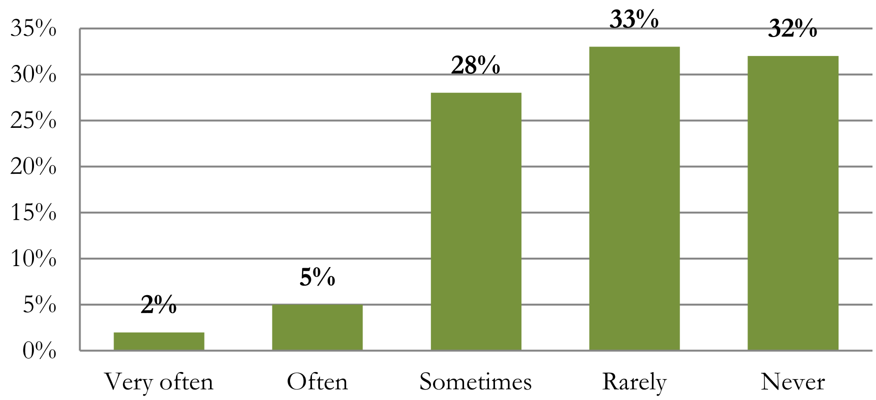
Farmers experienced an increase in sales for multiple markets from 2014 to 2015 (n=201)



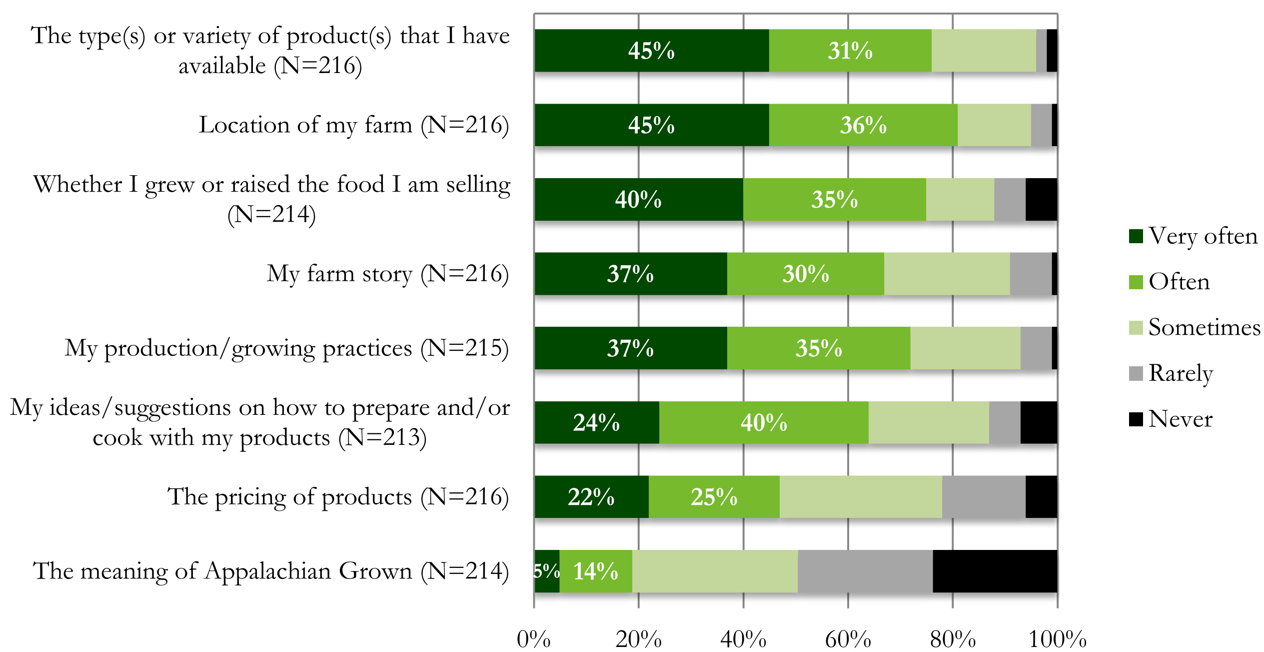
"Other"	n
Farmers markets	23
Direct to consumer	5
On farm	4
Breweries	3
Online	2
Private events	2
Festivals	2
Farm store	2
Roadside farm stand	2
Hard cider producers	1
Florists	1
Farm to table dinners	1

Interactions with Customers

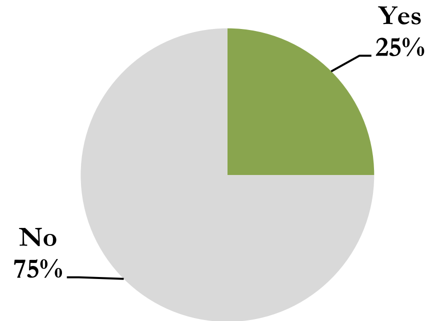
68% **of farmers indicated that customers are asking for AG certified products (n=218)**



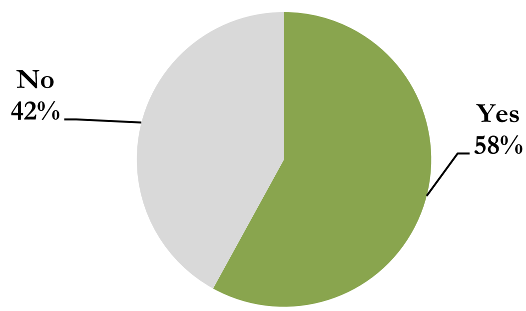
Most often, customers are asking farmers about the types or variety of products that the farmer has available and the location of the farm.



25% **of farmers have made changes to their <u>growing practices</u> based on feedback from customers (n=216)**



58% **of farmers have made changes to the <u>types of products they offer</u> based on feedback from customers (n=214)**



Changes to Growing Practices	n
Began to choose products based on customers preferences	7
Began using sustainable growing practices	6
Expanded our product offerings	5
Made changes to feed	5
Increased productivity	3
Began offering grass-fed beef	3
Changed pest control methods	3

Changes to Types of Products Offered	n
Grow/offer more varieties	28
Grow/make more of requested items	20
Offer different cuts of meat	10
Adjust quantity of products grown/produced	7
Make changes to packaging	4
Offer unique varieties/niche products	4
Offer more value-added products	2

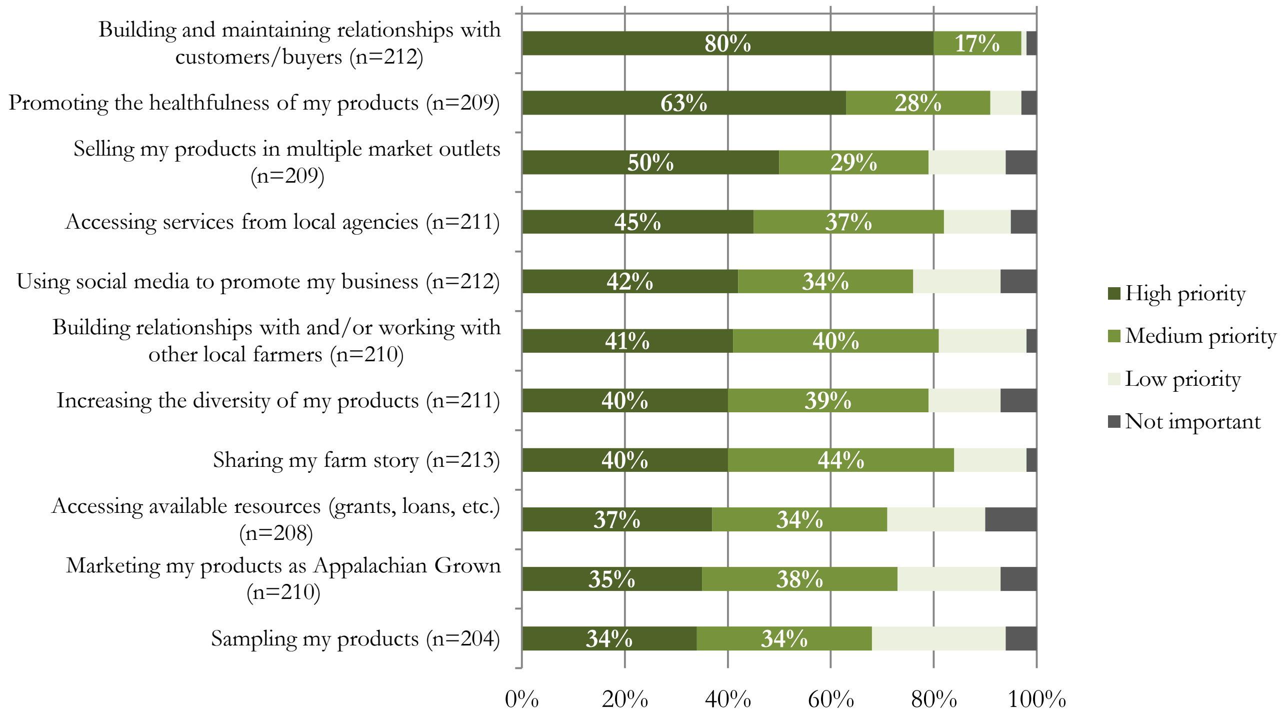
Challenges Farmers Are Facing

Emergent Themes	Illustrative Quotes
Consumer education, knowledge about the benefits of buying local, seasonality, and sustainable growing practices (n=11)	"Educating the public on my product." "General public knowledge of farming and food production is low."
Determining a fair price for products (n=11)	"Pricing. Making sure we are getting what the produce is worth."
Competition with other growers (n=10)	"Competing with farmers who don't grow all that they sell but who lead people to believe."
Time/time management (n=10)	"Time management. The need to be on the farm and be at the market at the same time."
Transportation/delivery (n=9)	"Transportation of products."

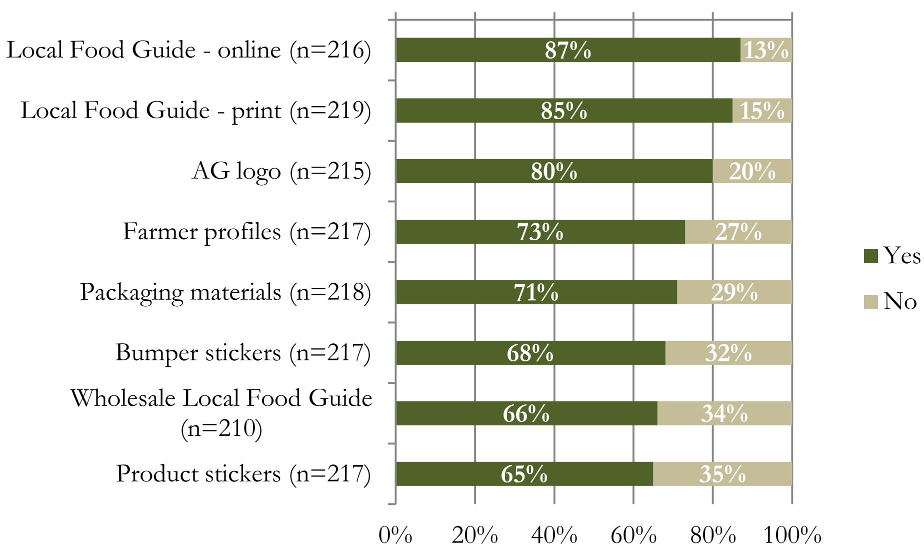
Other challenges	
Marketing/promotions	High cost of farming
Determining quantity to grow/produce	Unpredictable consumer interests/preferences
Selling at a local market	Oversaturation of markets
Labor	Location
Price distortion	Storage of products
Misleading information being shared by some growers	Having consistent products
Climate change/weather	Insects/pests
Processing	Connecting to consumers
High demand	Offering variety

Strategies Farmers Are Using to Address Challenges

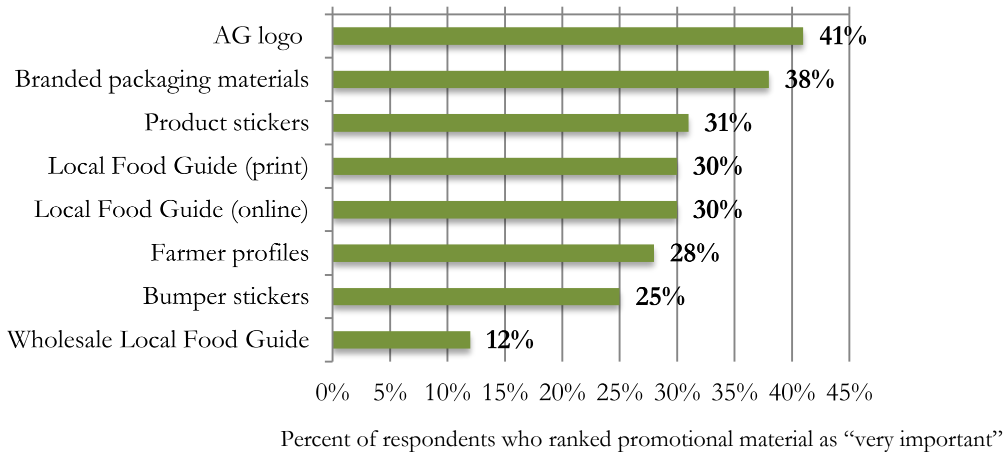
Farmers are using various strategies to address the challenges of growing for and selling to local markets.



Use of Appalachian Grown Promotional Materials



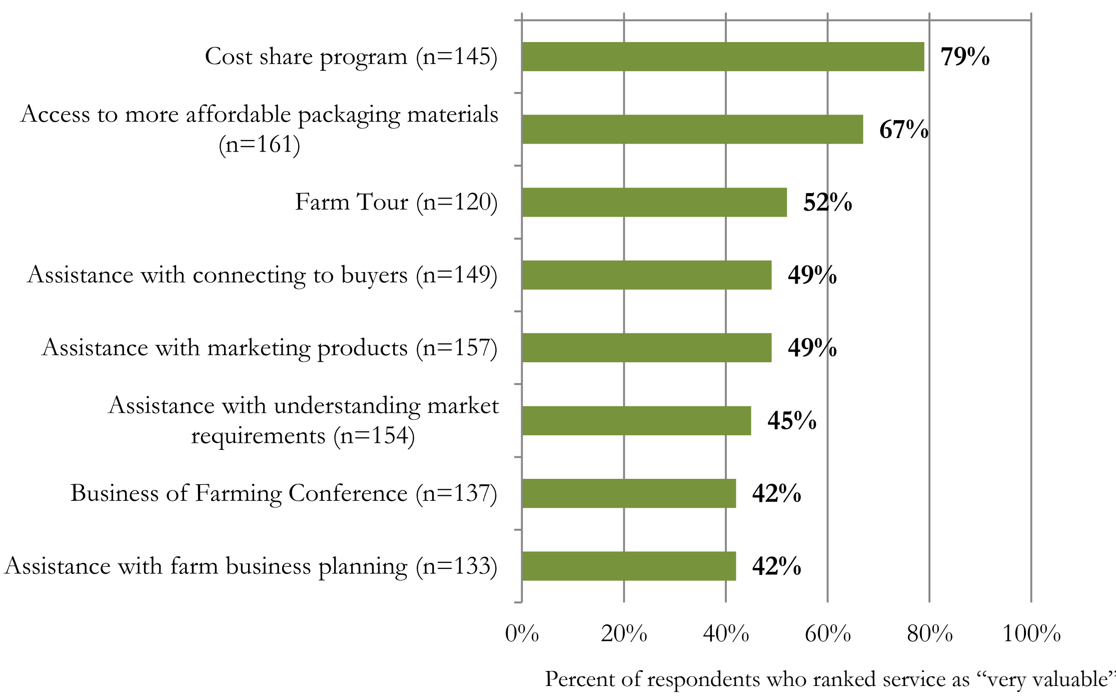
The Appalachian Grown logo is the most important promotional material in helping to increase sales, followed by branded packaging materials (n=220)



Value of Appalachian Grown Services

Through its Appalachian Grown program, ASAP provides assistance to farmers on topics ranging from marketing to understanding the requirements for vending at a farmers market. ASAP also offers cost share support to Appalachian Grown certified farms and tailgate markets in North Carolina to be used in the promotional of locally grown food, through support from the North Carolina Tobacco Trust Commission. Additionally, ASAP hosts several annual events to help farmers build more sustainable and profitable farm businesses. This includes the Farm Tour and the Business of Farming conference.

Farmers were asked to rank each of the services/programs offered through the Appalachian Grown program from very valuable to not valuable.



Opportunities for Improving the Appalachian Grown Program

Respondents were asked to provide input on how the Appalachian Grown program can be improved.

Emergent Theme	Illustrative Quotes
Assist with market research (n=4)	"Need more help with market research to know what marketing strategies are most effective."
Expand cost share program (n=3)	"It would be great if cost share funds could be allocated for farmers market promotions."
Increase consumer education about benefits of supporting local farms and buying local food (n=3)	"We need more help in TN working toward creating the kind of local food scene found in Asheville."
Expand advertising/marketing of AG program (n=2)	"Marketing outreach."
Offer more marketing assistance (n=2)	"More assistance with determining current market prices of produce being locally-grown."
Expand services to far west (n=1)	"ASAP is not well recognized far west of Asheville."
Allow ASAP staff to do visits throughout the region (n=1)	"We miss seeing ASAP representatives."
Offer more grower-buyer meetings (n=1)	"More buyer-grower meetings."
Feature farms throughout the Appalachian Grown region (n=1)	"Need to have featured farmers in different counties."
Partner with WNC Farmers Market (n=1)	"My wish would be for ASAP to integrate with the WNC Farmers Market."