



2023 Appalachian Grown Annual Producer Survey Report

ASAP Local Food Research Center

April 2024

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Introduction



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. To support Southern Appalachian farms and build a local food system, ASAP developed the Appalachian Grown program in 2007 with the goal of expanding local market opportunities for farmers by 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 annually 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. A trusted label helps buyers and shoppers know when they are spending their dollars to the benefit of local family farms and communities. When consumers see the Appalachian Grown logo 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. Additionally, ASAP provides AG certified farms with training and technical assistance, market connections, and cost share funding, when available.

In 2023, 886 farms were Appalachian Grown certified.

The Appalachian Grown 2023 Producer Survey

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

In November 2023, this annual online survey was sent to 886 AG certified producers - those farmers for which we had a valid email address. The survey asked about their experiences farming in 2023. It opened November 24, 2023 and closed on December 22, 2023. A total of 169 out of the 886 producers completed the survey, a response rate of 19%.

This report contains the findings from the survey.

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Executive Summary

This report presents findings from the 2023 annual survey of Appalachian Grown (AG) certified farmers in the Southern Appalachians. These farms are small, family-owned, and primarily located and selling in Western North Carolina (WNC). This annual survey gathers information about market channel opportunities, marketing strategies, and farm product sales. Producers were also able to report both the challenges they face farming in this region and the impact that the AG program has had on their farm business' success.

In 2022, for the first time, producers were asked if they wished to purchase or lease more land, and if they experienced any challenges when doing so. In 2023, another question was added to further promote farmer-to-farmer learning among AG producers. Farmers who have successfully acquired land were asked to share any advice they had for others looking to buy or lease land of their own. Tips related to financing, networking, and persistence were among the most commonly shared.

Interpersonal communication continued to be the most beneficial tool for Appalachian Grown farmers trying to find new customers. Word of mouth from other producers and buyers was the most useful for finding new wholesale customers. For finding new direct customers, the most useful strategy to farmers was selling through direct markets. When marketing their products, farmers find it valuable to communicate about the growing practices they use and keep consumers up to date on what produce is available and in season.

These strategies for acquiring new customers proved effective; Appalachian Grown farmers were overall more productive and had higher earnings in 2023 compared to 2022. Respondents reported experiencing processing and sourcing delays far less frequently. Fewer producers reported seeking additional off-farm work, likely due to the fact that a higher percentage of respondents generated all of their family income from their farm business. AG producers had higher gross sales in 2023; the percentages of farmers earning between \$40,000-\$80,000, \$80,000-\$120,000 and \$400,000-\$600,000 annually rose significantly.

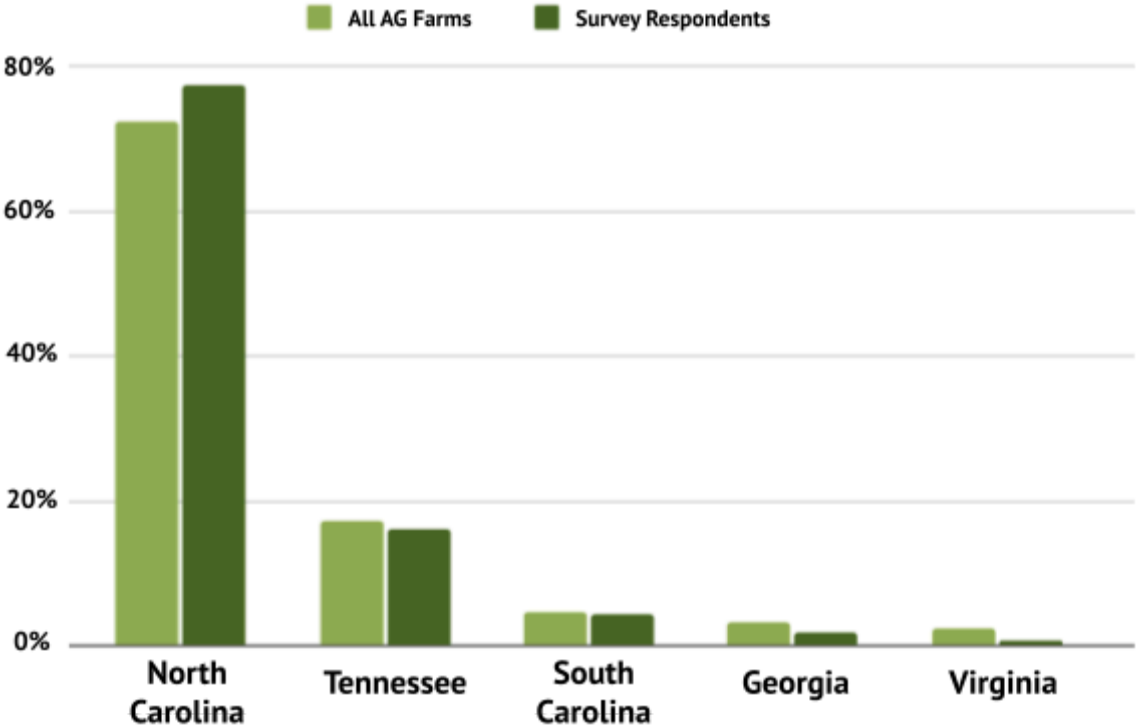
When asked what gives them hope and inspires them to continue farming for another year, there was no shortage of positive feedback from Appalachian Grown producers. Being able to connect with customers and other community members was a primary driving force for respondents going into the 2024 season. AG farmers expressed their enthusiasm for new crops and production methods, improvements made to their farm businesses, and the practice of farming itself.

Summary Findings

Farmers and Farm Operations

The responses to this survey represent the experiences of 169, or 19 percent, of 886 Appalachian Grown farmers in 2023. This section details the characteristics of the sample of producers who responded to the survey. As seen in Figure 1, this sample is relatively representative of the geographic distribution of farms in the Appalachian region. Approximately 77 percent of survey respondents farm in North Carolina, slightly more than the 72 percent of all North Carolina AG farmers. Additionally, the seven counties with the most representation are in North Carolina (Buncombe, Henderson, Madison, Haywood, McDowell, Yancey, and Ashe, respectively). Watauga, Cherokee, and Polk counties in North Carolina and both Knox and Greene counties in Tennessee had notable representation as well. Figure 2 includes a map of the Appalachian Grown region for reference.

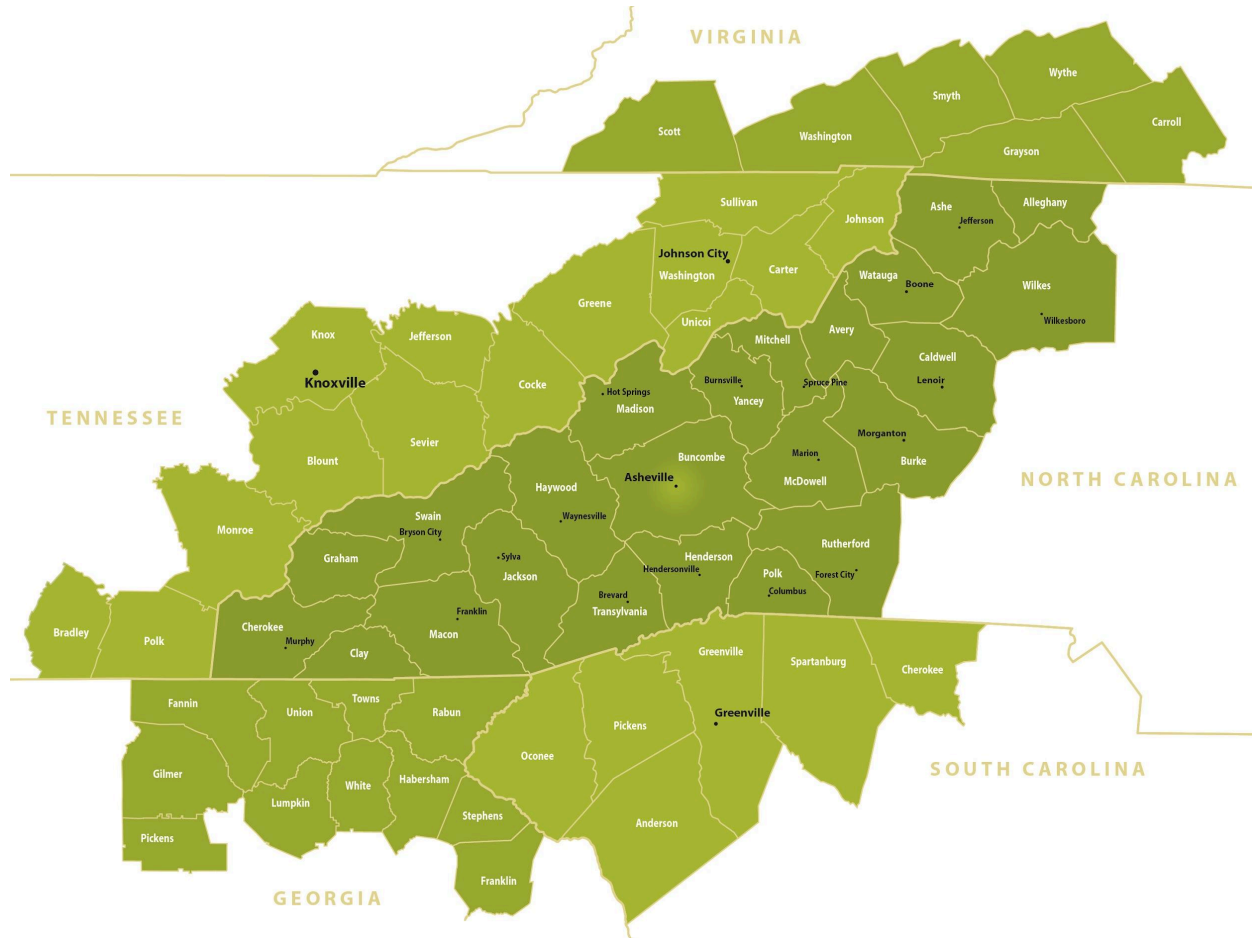
Figure 1
Percent of Farms in Appalachian Grown States



Demographic information was not collected by this survey, however, Appalachian Grown farmers have the opportunity to self-identify as a part of their Local Food Guide listings. Approximately 74 percent of AG farmers identify as White, 1.4 percent identify as Hispanic or Latino, 0.6 percent identify as Native American or Alaska Native, 0.5 percent identify as Black or African-American, and 0.4 percent identify as Asian. Additionally, 5.9 percent have two or more racial identities. The ages of Appalachian Grown farmers range from 23 to 93. The average age is 53 years old. Forty-five

percent of primary operators are female. When compared to USDA Census of Agriculture data of all Western North Carolina (WNC) farmers, on average, AG producers are more racially diverse (96 percent of WNC identify as White), are younger (58 is the average age of WNC farmers), and a higher percentage are female (35 percent of all WNC farmers are female)¹.

Figure 2
Map of the Appalachian Grown Region



Fifty-six percent of survey respondents were “new” to farming. The USDA defines a New and Beginning Farmer or Rancher as being the primary operator on a farm (i.e., making the day to day decisions) for 10 or fewer years. Thirty-seven percent of all Appalachian Grown producers are considered New and Beginning, significantly less than survey participants. Additionally, 47 percent of farms that responded fit the USDA definition of a limited resource farm, meaning they had low farm sales (less than \$221,000) and low household income (below national poverty level or less than 50 percent of the median household income) for two years in a row. This is up from the 36 percent of respondents that operated limited resource farms in 2022.

¹ USDA National Agricultural Statistics Service. 2022 Census of Agriculture. Complete data available at www.nass.usda.gov/AgCensus.

Survey participants had an average of 49.5 acres* in production in 2023. This is slightly lower than the average acreage for all Appalachian Grown farms: 52.5 acres.** Acreage in production differs from total farm size, as it only includes farmland that is actively used to produce crops, graze animals, or harvest timberland. Farmland in production ranged from 1,800 square feet to 1,400 acres* for survey respondents and from 436 square feet to 10,000 acres** across all Appalachian Grown farms. However, 48 percent of survey respondents and 57 percent of all AG farmers operated on six acres or fewer.

*This calculation does not include an outlying 2,046 acres.

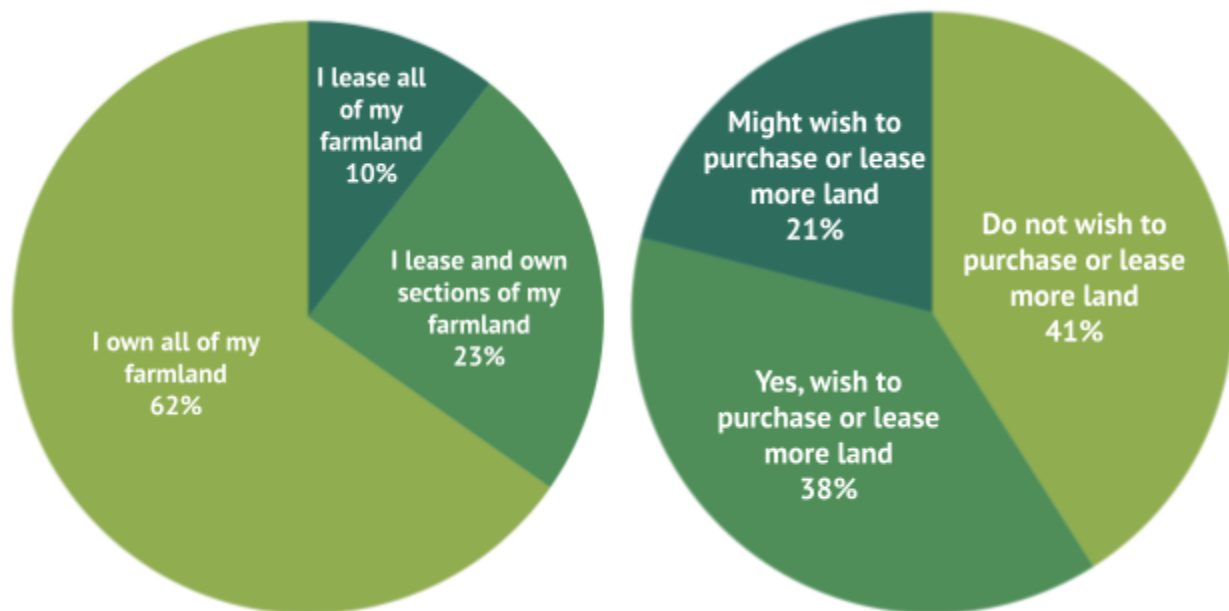
**This calculation does not include an outlying 512,000 acres.

Accessing New Land for Farming

Appalachian Grown farmers operate under a variety of land arrangements, as seen in Figure 3. Just over 60 percent of AG farmers own all of their farmland. Twenty-three percent lease some sections of their farmland and own others, and the remaining 10 percent of producers exclusively lease their land. A few farmers had land arrangements that did not fit into any of those three categories, such as those utilizing community farmland, donated land, and land owned by family members. Nearly 40 percent of farmers expressed a definite desire to purchase more farmland and just over 20 percent indicated that they may wish to do so, **totaling almost 60 percent of respondents who are interested in buying or leasing more land in the future.**

Figure 3

*Percent of Farmers that Own and Lease Land;
Percent of Farmers that Wish to Purchase or Lease More Land*



Unfortunately, the process of obtaining new farmland is not without its difficulties. Farmers were asked to share their biggest challenges related to expanding or moving their farm production to

new land. The most commonly cited barriers to purchasing or leasing land were availability and price. Seventy-two percent of surveyed AG producers faced difficulties both finding land and being able to afford it. Many respondents blame commercial developers, who they cite as the reason for both the scarcity of farmland and increase in prices of the few available pieces of land. Other producers, especially those looking to lease more land, reported issues finding “compatible” landowners. Though these were the most commonly-faced issues, AG producers reported many other barriers as well. Twenty-three percent of producers interested in purchasing/leasing more land expressed that financing and accessing capital were major challenges. Respondents either did not have enough capital on their own or had difficulty obtaining loans that would allow them to purchase/lease more land.

“Not much available. [It’s] hard to plan for the future when you [don’t] know if you’ll have the leased land the next year.”

“Finding the right fit and having enough [capital].”

“It was extremely difficult for us to afford buying land. It took us many years and now that we own, it’s very tough to afford the monthly mortgage. Leasing was alright, but being at the mercy of a landlord grew very tiring.”

“We cannot compete with the value of land sold for commercial development. We recently looked into purchasing the additional 30 acres that is adjacent to our land, but it is priced at \$1.3-1.5 million for development. We simply cannot afford to compete.”

In spite of these challenges, **AG producers continued to persevere and maintain hope**. When asked for advice about what they’ve learned from purchasing or leasing land, respondents had countless tips to share with their fellow farmers. Over one-quarter of all respondents emphasized the importance of financing and the legal aspect of obtaining land. Some even recommended specific methods and organizations they have used in the past. Respondents also advocated for forming relationships with landowners and using existing connections to find available land. For others, a lot of persistence and a little bit of luck went a long way.

“Patience! Good relationships! [Personal] interactions!”

“Stay in touch with the landowners, be honest with them and do what they ask you to do.”

“Sign a very, very thorough lease agreement that has been reviewed by a lawyer. No matter your relationship with the land owner, this is absolutely critical.”

“Get everything in writing and keep communication lines open throughout the process.”

“Keep asking, build relationships within community.”

“Network, make friends, volunteer with organizations who share your interests. I was able to find a place to lease through connections, hoping to find a place to purchase eventually.”

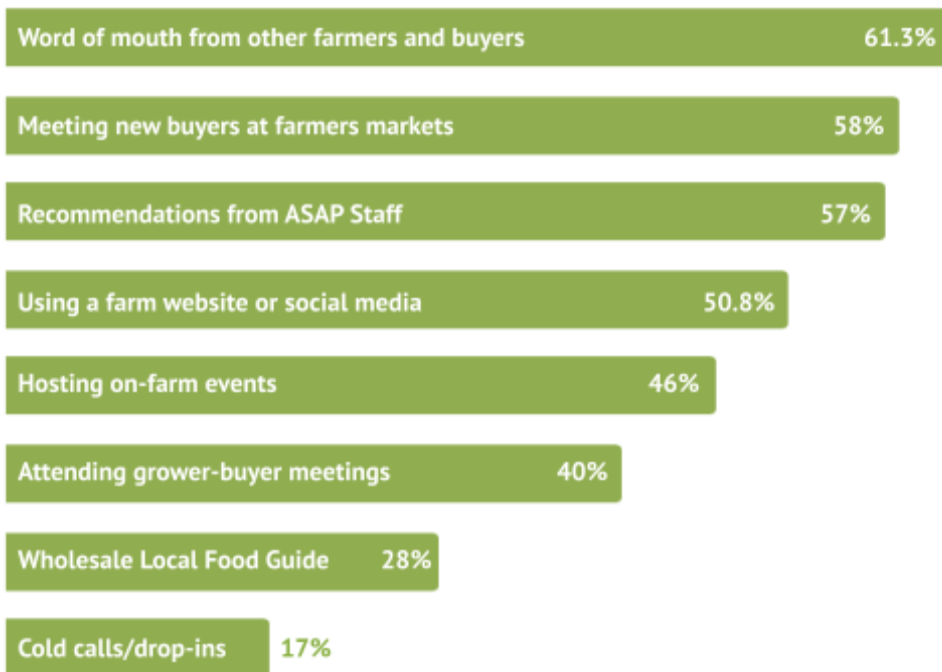
“Communication, lease agreement, luck.”

Building Relationships with Customers

One of the most vital elements to the success of a farm business is a producer's ability to connect with new wholesale buyers and individual customers, and maintain those relationships. Farmers utilize a number of strategies when seeking out new buyers, and this section of the survey asked producers to rate the usefulness of each. **Approximately 61 percent of farmers rated word of mouth from other farmers and buyers as “very useful,” making it the most useful strategy for finding new wholesale buyers among AG producers in 2023.** More than half of the surveyed producers also found meeting buyers at farmers markets, recommendations from ASAP staff, and using a farm website or social media useful, as seen in Figure 4.

Figure 4

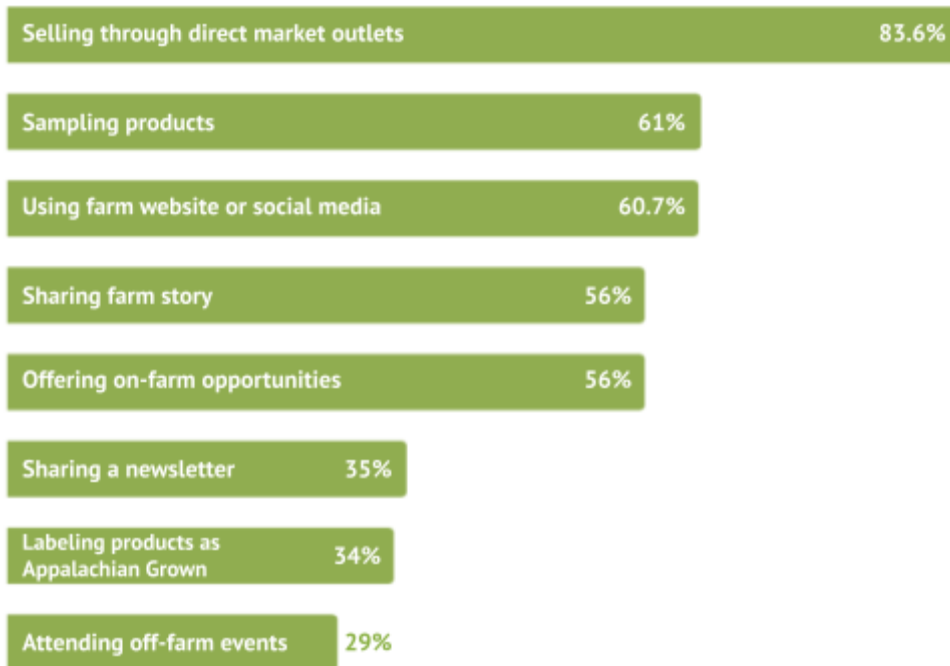
Strategies Farmers Used and Rated as “Very Useful” for Finding New Wholesale Buyers in 2023



When forming relationships with individual customers, farmers utilize slightly different strategies than they do when connecting with wholesale buyers. **Almost 84 percent of AG producers rated selling through direct market outlets, such as farmers markets and farm stands, as the most useful strategy for finding new direct customers.** As seen in Figure 5, this surpassed the second most useful strategy by over 20 percent. Sampling products, using a farm website or social media, sharing their farm story, and offering on-farm opportunities were also reported to be very useful strategies for finding new direct customers.

Figure 5

Strategies Farmers Used and Rated as “Very Useful” for Finding New Direct Customers in 2023

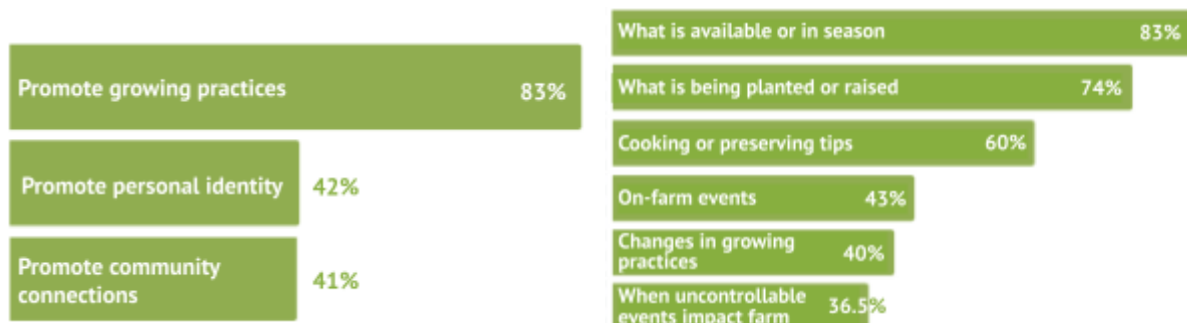


One of the benefits of selling through direct markets is that producers are able to make authentic connections with their customers. AG farmers were asked what methods they use when promoting their farm products to customers. Many chose to promote their community connections (i.e. proceeds go to a special cause, products found at certain restaurants, etc.) or their personal identity (i.e. woman-owned, BIPOC-owned, veteran-owned, etc.). **Over 80 percent of Appalachian Grown farmers promote their farm products based on their growing practices.** These growing practices include organic, no-till, hydroponic, grass fed, and regenerative, among numerous others.

Once farmers have built relationships with their customers, they are able to regularly share information about their farm and products. AG producers reported providing farm updates with their customers through formats like newsletters, social media, and in person. Over 80 percent chose to share what produce is currently available and in-season, and three-quarters chose to share what crops or livestock are being planted or raised. Over half of the respondents also provided their customers with cooking or preserving tips. Figure 6 further classifies these results. These updates further the connection between producer and consumer past the point of simply making a sale, educate consumers, and help them to engage more fully in building the local food movement.

Figure 6

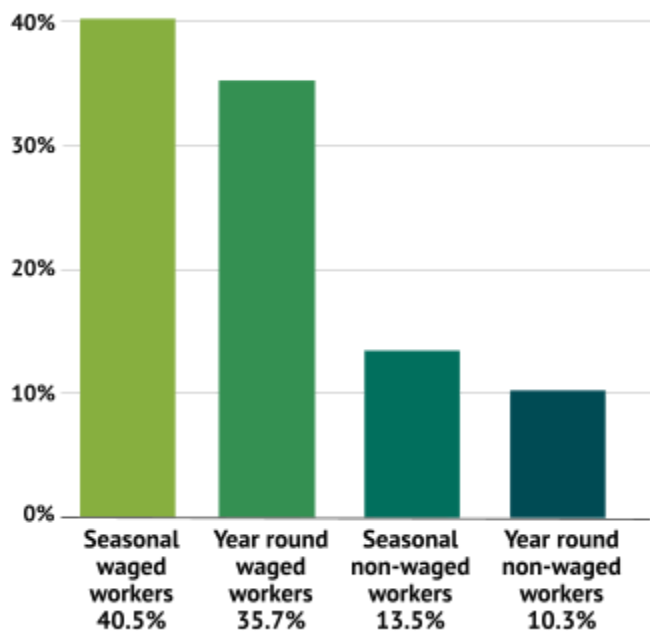
*Ways Farmers Promote their Farm Products to Customers;
What Farmers Update Customers About their Farm*



Economic Impacts, Market Outlets, and Farm Sales

Farmers were asked to report the number of waged and non-waged workers employed at their farms, both those employed seasonally and year-round. **The Appalachian Grown producers who responded to this survey employed a total of 414 workers.** Fifty-one farms employed 210 seasonal, waged workers, and 45 farms had 116 waged workers employed year-round. Non-waged workers could include family members, volunteers, or interns who, instead of receiving a wage, are typically paid in housing, food, stipends, and other forms. Seventeen farms accounted for 68 seasonal, non-waged workers. Thirteen farms had 20 year-round, non-waged employees. Figure 7 shows the percentage of producers who used each type of labor on their farms.

Figure 7
Percent of Farmers Who Used Each Type of Labor

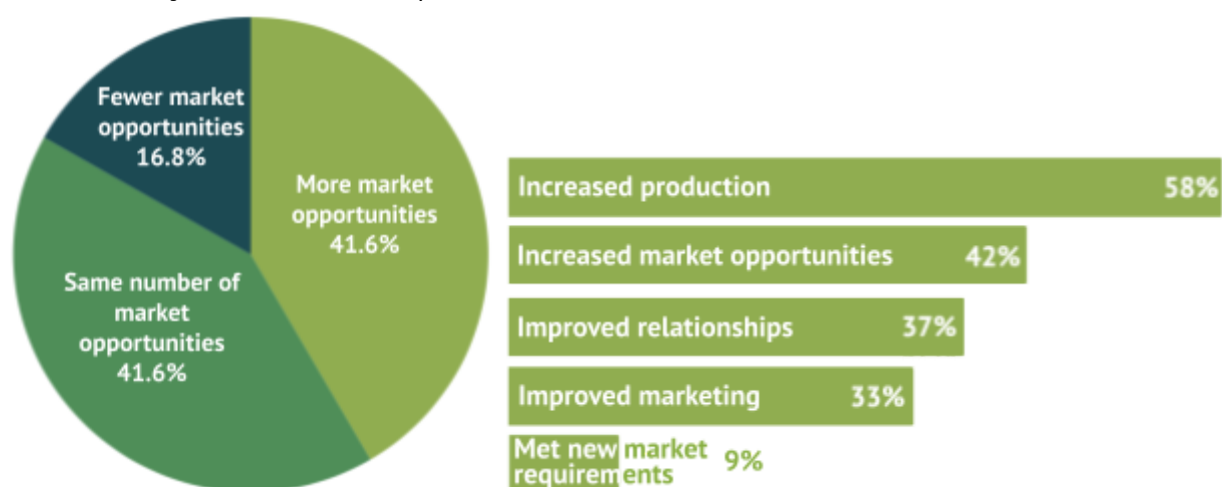


Surveyed Appalachian Grown producers had a similar market outlook in both 2022 and 2023. In 2022, 86 percent of respondents believed there were the same or more market opportunities available compared to the previous year. As seen in Figure 8, **approximately 83 percent of respondents believed there were the same or more market opportunities available in 2023.** Similarly, producers cited the same top reasons for market expansion in 2023 as they did in 2022. Increased production was the reason most producers were able to expand into new markets while others cited increased market opportunities and improved relationships with buyers as top reasons. Nearly 17 percent of producers believed that there were fewer markets available in 2023, a slight increase from 14 percent in 2022.

Figure 8

Market Opportunities in 2023 compared to 2022;

Factors that Influenced Farmers' Expansions into New Markets in 2023



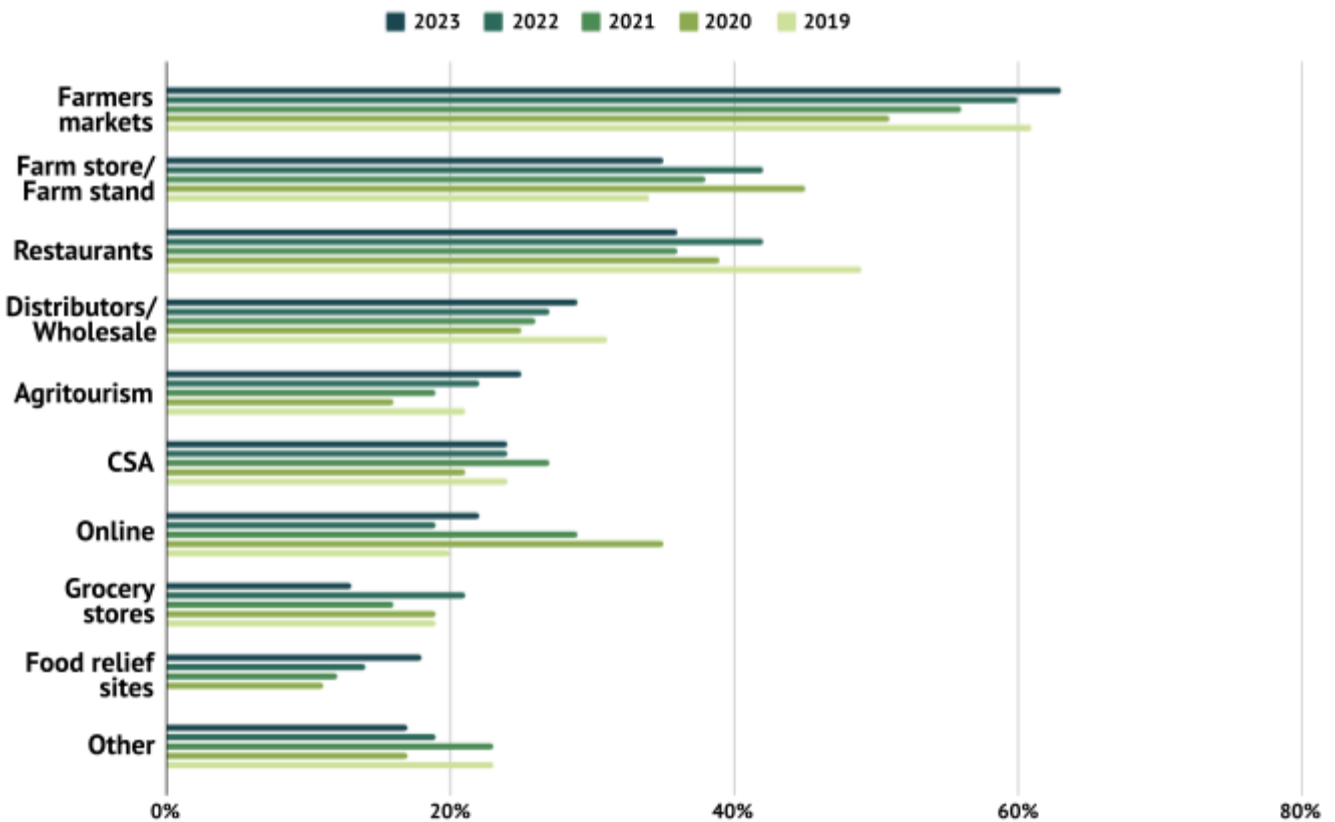
Farmers can sell their products through direct, intermediate, or wholesale channels, or a mix of these three. Very few producers relied on only one channel in 2023. Compared to the nearly 30 percent that sold exclusively to one market channel in 2022, only 14 percent sold to one market channel in 2023. Notably, the number of farmers selling exclusively through direct markets decreased from 23 percent in 2022 to only eight percent. Within each market channel, there are a number of market outlets. Direct market outlets include farmers markets, CSAs, agritourism, and farm stores/farm stands. Intermediate market outlets include restaurants and online. Wholesale outlets include grocery stores, distributors, schools, and food relief sites. In 2023, 15 percent sold to only one market outlet, 32 percent sold to two outlets, 25 percent sold to three, 19 percent sold to four, and 10 percent sold to five. The latter is a decrease from 14 percent last year. **Farmers sold to an average of three market outlets in both 2022 and 2023**

For most market outlets, **the percentage of farmers that sold to each is comparable to pre-COVID numbers**, as seen in Figure 9. 2019 marked the last full year of normalcy before the COVID-19 pandemic began in early 2020. During the pandemic, the percentage of farmers selling to farmers markets, restaurants, and wholesalers/distributors, and those participating in agritourism drastically decreased. Since 2021, these numbers have been steadily climbing and most are comparable to their pre-pandemic percentages with two exceptions. The percentage of farms

selling to restaurants remains below 2020 levels. Although agritourism numbers dropped initially, there was a higher percentage of farmers involved in 2023 than in 2019. Inversely, the percentage of farmers selling online and through farm stores/stands drastically increased in 2020, primarily due to the ability to limit in-person contact via these outlets. **Both have decreased, and in 2023, only slightly surpassed their pre-pandemic numbers.**

Figure 9

Percent of Farmers that Sold to Each Market Outlet in 2023, 2022, 2021, 2020, and 2019

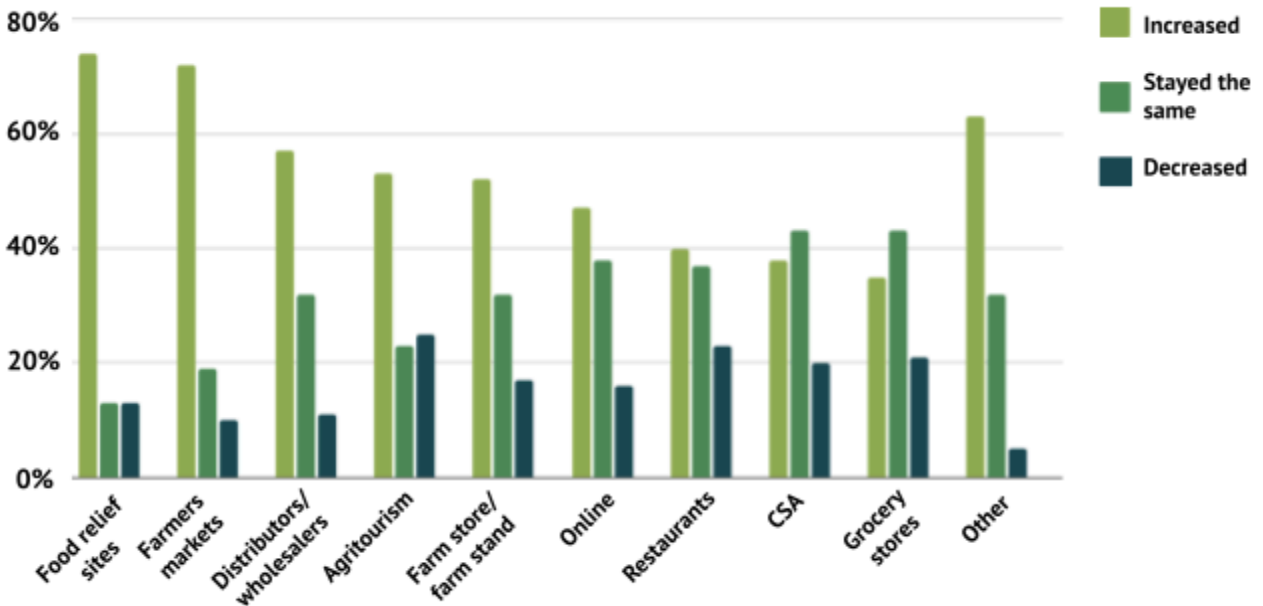


Note: Food relief sites were added as a new category in the 2020 Annual Survey.

2023 saw a number of significant shifts in sales from various market outlets, detailed below in Figure 10. **More than six times as many farmers experienced increased sales at farmers markets than those who experienced decreased sales.** With the exceptions of restaurants, online, grocery stores, and CSAs, farmers saw a higher percentage of increased sales than decreased or steady sales in nearly all market outlets. Even for these exceptions, the percentages of farmers who experienced decreased sales was minimal. Restaurants had the largest number of farmers reporting a decrease from 2022 to 2023 (11 percent).

Figure 10

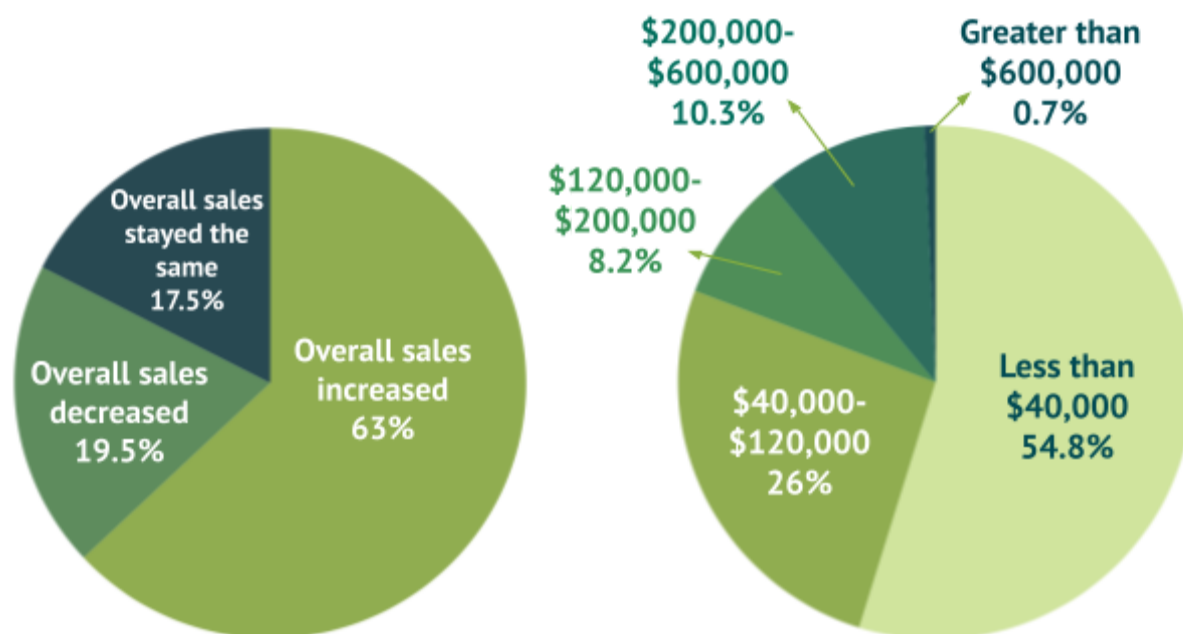
Percent of Farmers whose Sales Changed for Each Market Outlet



As seen in Figure 11, **gross sales were on the rise in 2023 among AG producers.** Sixty-three percent of farmers reported their gross sales were higher in 2023 than 2022. In 2022, 61 percent of farmers made less than \$40,000 in gross sales from their farm business. In 2023, this figure dropped to just under 55 percent. In that same time, the percentage of farmers who made between \$40,000 and \$120,000 annually rose from 20 to 26 percent, and the percentage of those who made between \$400,000 and \$600,000 annually rose from one to five percent. Meanwhile, fewer farmers reported decreased sales. While 23 percent saw decreased sales in 2022, that number dropped to less than 20 percent in 2023. Though sales fluctuate year-to-year depending on a variety of factors, these figures could potentially indicate the stabilization of an economy that was largely unpredictable for a few years as a result of the COVID-19 pandemic.

Figure 11

Sales Changes Compared to 2022; Gross Sales for 2023



As rewarding as participating in the local economy as a producer can be, Appalachian Grown farmers did face some challenges throughout 2023 when selling to local markets. Logistical problems such as balancing time on and off of the farm and sourcing labor were common issues. Many producers also reported difficulties maintaining demand and making potential customers aware of their presence. Finally, producers reported oversaturated markets, having trouble marketing their products, and various farm-specific difficulties.

Challenges Selling to Local Markets

Theme	Quote
Logistics & Labor 28%	<p>“Sales at farmers markets as expected. Entry path to other markets unclear and limited by available time and labor and to some degree location (isolated).”</p> <p>“Balancing time on the farm and time to be at markets.”</p> <p>“Our time and capacity and not having our complete operations in one location.”</p>
Demand, Inconsistencies and Educating Consumers 28%	<p>“Lack of awareness of the presence of farmers' markets/customers who think that farmers' markets are too expensive/lack of support & cooperation from small town government.”</p> <p>“Getting the public to know we are here and what we offer.”</p> <p>“Selling at a high enough rate to make a profit while still being accessible</p>

	to people.”
Supply, Can't Grow Enough to Meet Demand 11%	“Small production area, limits my amount to sell to more than one outlet, I'm trying to find land...” “Keeping a constant steady supply of products.”
Competition & Oversaturated Markets 10%	“[Too] much competition, there are more local growers/producers [than] there are outlets.” “All other growers have the same things available at the same time, and the markets get flooded with similar inventory.”
Marketing 10%	“Communication about the value of organically managed and regeneratively grown products.” “Time to market.” “Differentiating my produce from other [farmers'] products.”
Other 21%	“My health” “Climate change.”

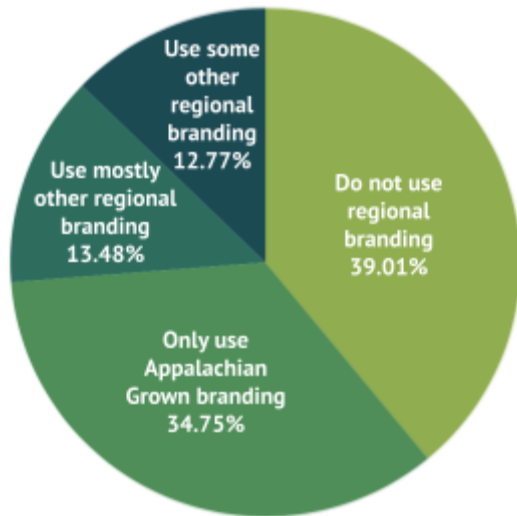
Participation in the Appalachian Grown Program

In this section, farmers were asked to reflect on how they engaged with ASAP's Appalachian Grown program and how the program has impacted their farm business. ASAP offers promotional materials and discounted branded packaging to help customers identify and recognize farmer products as locally grown in this region. These materials include stickers, bags, wax boxes, twist ties, and more. In 2023, approximately 62 percent of surveyed farmers reported using Appalachian Grown branding on at least some of their products, virtually equivalent to the 63 percent who reported the same in 2022. On average, 36 percent of products were labeled with Appalachian Grown branding.

Though the focus of this survey was the Appalachian Grown program and its branding, many producers report using other or additional packaging or labels to promote their local products. As seen in Figure 12, approximately 26 percent of farmers who used regional branding used Appalachian Grown labeling in conjunction with some other regional branding. Aside from Appalachian Grown, most producers used regional branding such as Got To Be NC Agriculture, Pick Tennessee Products, and SC Grown. Others simply labeled their products as locally grown or indicated exactly where the product was grown on its packaging.

Figure 12

Percent of Farms Who Use Regional Branding



In addition to providing Appalachian Grown branded packaging, ASAP’s programming aims to educate consumers on the value and availability of local food, promote local food market outlets, and engage the community in various other ways. Consumer education was perceived to be the most helpful of ASAP’s services for increasing sales; **64 percent of AG producers rated consumer education about how or why to buy local as “very important.”** Similar to 2022, the services deemed most important in 2023 were consumer education, sharing local farm stories in media, highlighting local product availability, and promotions of market outlets. Sharing local farm stories rose five percent in perceived importance, from the fourth most important in 2022 to the second most important in 2023. These results can be seen below in Figure 13.

Figure 13

ASAP Services Rated as “Very Important” for Increasing Sales in 2023



The Impact ASAP's Appalachian Grown Program has had on Farmers (selected testimonials)

"Honestly, ASAP has been a fundamental part of the growth of our market garden. From packaging, to the support we received when we attended Asheville City Market before our move to Haywood county, to helping forge connections within the community, ASAP has drastically improved our experience of farming in WNC."

"The Farm Fresh Prescription program has made a significant impact in the accessibility of getting fresh local food to people at farmers markets. Between that program, SNAP/EBT and the Seniors Farmers Market Nutrition Program, we made new connections, saw new faces at market, and people receiving nutritional assistance would make up 20-25% of our market sales"

"Our business would not be running if it weren't for ASAP. During our first season, it felt everything was falling in on us. We called David and blurted out 8 or 9 issues we had. And within the timeframe of that conversation, David fixed everyone one of them and got me in contact with more in-depth support."

"ASAP has been a great opportunity to [promote] our story and community work. You have been considering us in several opportunities that are very important for us. Even [though] we are a small farm you have treated us and involving us with a lot of support and respect."

"In addition to the marketing cost-share program, the classified ads have been helpful in finding part-time help. All the ASAP staff I have contact with have been very supportive, helpful, and encouraging. Thank you!"

This year was full of success stories for Appalachian Grown farmers. **Significantly more producers in 2023 indicated that they had increased sales or expanded into new markets than reported the same in 2022.** Many were able to make upgrades to their farms, and some discovered new production methods. Most surveyed producers had many accomplishments to report, some of which are included below.

"We saw many new faces and sales at the North Asheville Tailgate Market and Weaverville Tailgate market in 2023. We attribute the new customers to ASAP's Farm Fresh Bucks and the diverse families and individuals the program supports. We love the program for so many reasons- more shoppers at our already established sales venues means we have less waste on our farm, selling to a diverse population gives our work meaning, and increased sales means that we can pay our staff and ourselves more of a livable wage. These are all difficult things to achieve in farming, and we are so grateful that ASAP's double snap and prescription programs have so effectively done it."

"Our gross income for this year grew by slightly over 100%. We expanded into a new, more urban market, which is responsible for most of that growth. Demand for our product outstripped our ability to produce it this year, meaning that next year we are planning to expand our farm through additional leasing and greater poultry numbers."

“Always wanted to return to family farm life. I finally did it in [2023]. Modest success at market but satisfaction in dream realized and ability to provide fresh healthy food to local communities is reward enough.”

“In July 2023 we exceeded our total pounds of produce grown as compared to all of 2022.”

“We were happy to be invited to and participate in local farmers markets which have been great spaces to connect with other local farmers, producers and customers. We feel more known and valued by the whole community.”

What gave Appalachian Grown farmers hope to keep farming? An overwhelming majority of responses were exceedingly optimistic. Many producers were inspired by the local community; connections with customers and fellow farmers alike invoked a positive outlook among producers. A number of respondents expressed their desires to enter new markets in the 2024 growing season. Even those with less outwardly positive responses displayed perseverance and dedication to their craft.

“Knowing that the work we do goes beyond just providing a paycheck for us and our employees. It nourishes our community and brings back a balance to our ecosystem that has been lost due to hundreds of years of hard farming.”

“It is hard work but good work, and it fills us up in a lot of ways. That, and we see continued need for food security via community-oriented agriculture options.”

“The partnership we have with our food pantry has been a constant source of inspiration and joy for everyone on our farm. Being able to collaborate with an organization one mile from our fields to bring fresh produce to families in need gives our farm team a deep sense of meaning and also provides us with community connections. This is vitally important for local farmers. With the rapid loss of the farming culture here in WNC, creating authentic community connections for farmers will be key to keep them on their land.”

“The increased need that people have for food and the impact healthy food has on our local community.”

“Seeing success stories of other industry leaders achieving their goals is inspiring; It shows me that others have gone before me and turned nothing into something great for themselves and the community.”

“We simply see it as our way of life. Keeps us active and young!”

“I love this job and know people want access to fresh local produce. I hope to keep learning and grow more better and more easily.”

“The opportunity to do even better next year. It’s addictive!”

“I am learning everyday, I have narrowed down what crops are most profitable from last year, I plan to produce less varieties but concentrate on growing them more. I had an outstanding first year and hope to grow and become a farm that has employees and can feed as many local people as possible! “

“Farming itself gives me hope.”