

Executive Briefing: 2015 Local Food Marketing Practices Survey

December 20, 2016



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2015 Local Food Marketing Practices Survey

- Background
- Sampling and Survey Process Overview
- Results

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Background

- Special study from the 2012 Census of Agriculture.
- Supports the “Know your farmer, know your food” initiative.
- Provides benchmark statistics on Local Food marketing practices and sales.
- Results are available at the national, regional and state level.

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Sampling Process

- NASS List Sampling Frame
 - Stratified Sample Design
 - 24,907 records selected
- Independent Web Sourced List
 - Potential respondents collected from publically available information
 - 19,365 records selected
- Total Sample Size
 - 44,272

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Forms by Mode of Data Collection

Mode	Percent by Mode
Mail	42
Phone	39
Face - to - Face	13
Internet	6

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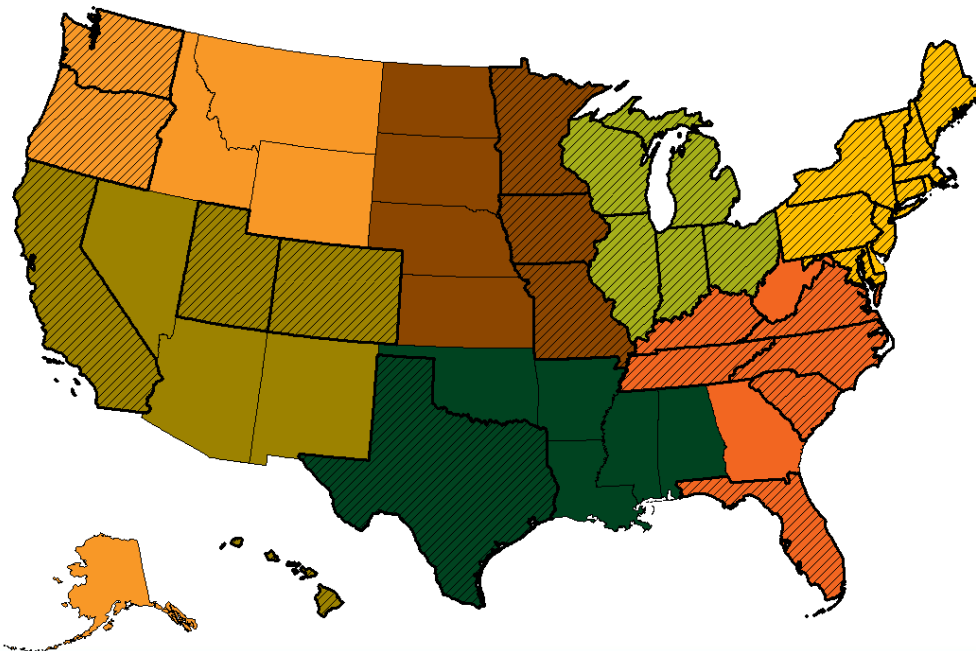
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Local Food Marketing Practices Publication Levels

Levels of Publication: US, Regional, and 30 States



Count of Published
items by level

US	393
7 Regions	33
30 States	15



=States with published data.

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Key Definitions

- Value Added:** Products that have been altered or packaged in a way that is not required for transportation before being sold.
- Commodity:** Food sold in its current state from livestock and crop categories.
- Operation:** A farm having at least \$1,000 in sales or potential sales, which produced and sold food for humans to eat or drink directly to consumers, retail markets, institutions, and intermediary businesses in 2015. Excludes abnormal operations such as a prison, school, church, or research facility.

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Operations Selling Directly: All Marketing Channels, 2015



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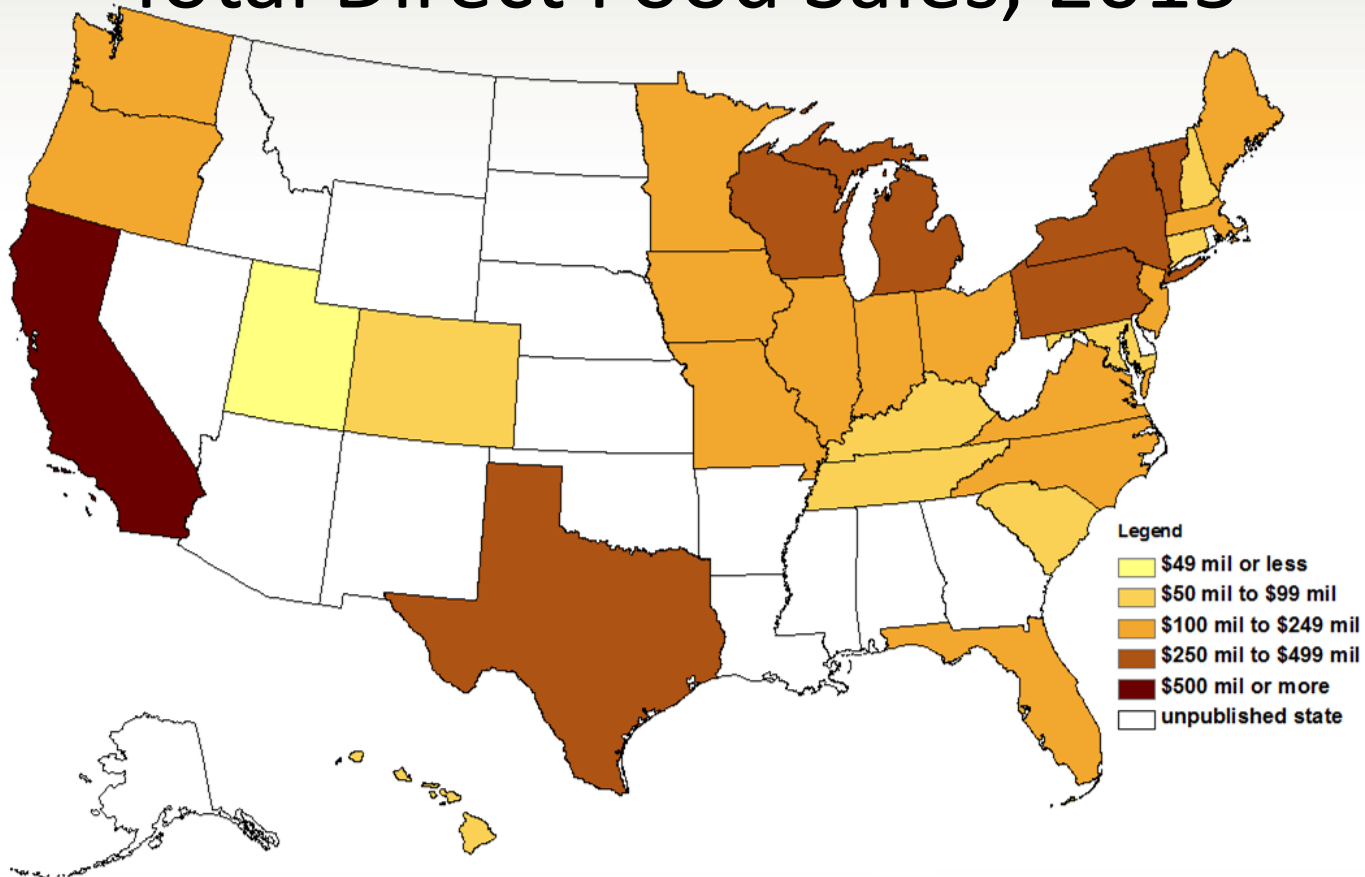
Operations Selling Directly: Count and Sales Through all Marketing Channels, 2015

- 167,009 operations used direct marketing practices to sell food in the US.
- \$8.7 billion dollars of food was sold through direct marketing practices, including value added products at the first point of sale.
 - \$4.8 billion were direct food sales of raw commodities.
 - \$3.9 billion were food sales of value added commodities.

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Total Direct Food Sales, 2015



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Total Direct Food Sales, 2015

Top 5 States

States	Sales (\$million)	Sales (percent of total)
California	2,869	33
Michigan	459	5
New York	441	5
Pennsylvania	439	5
Wisconsin	431	5
US Total	8,747	

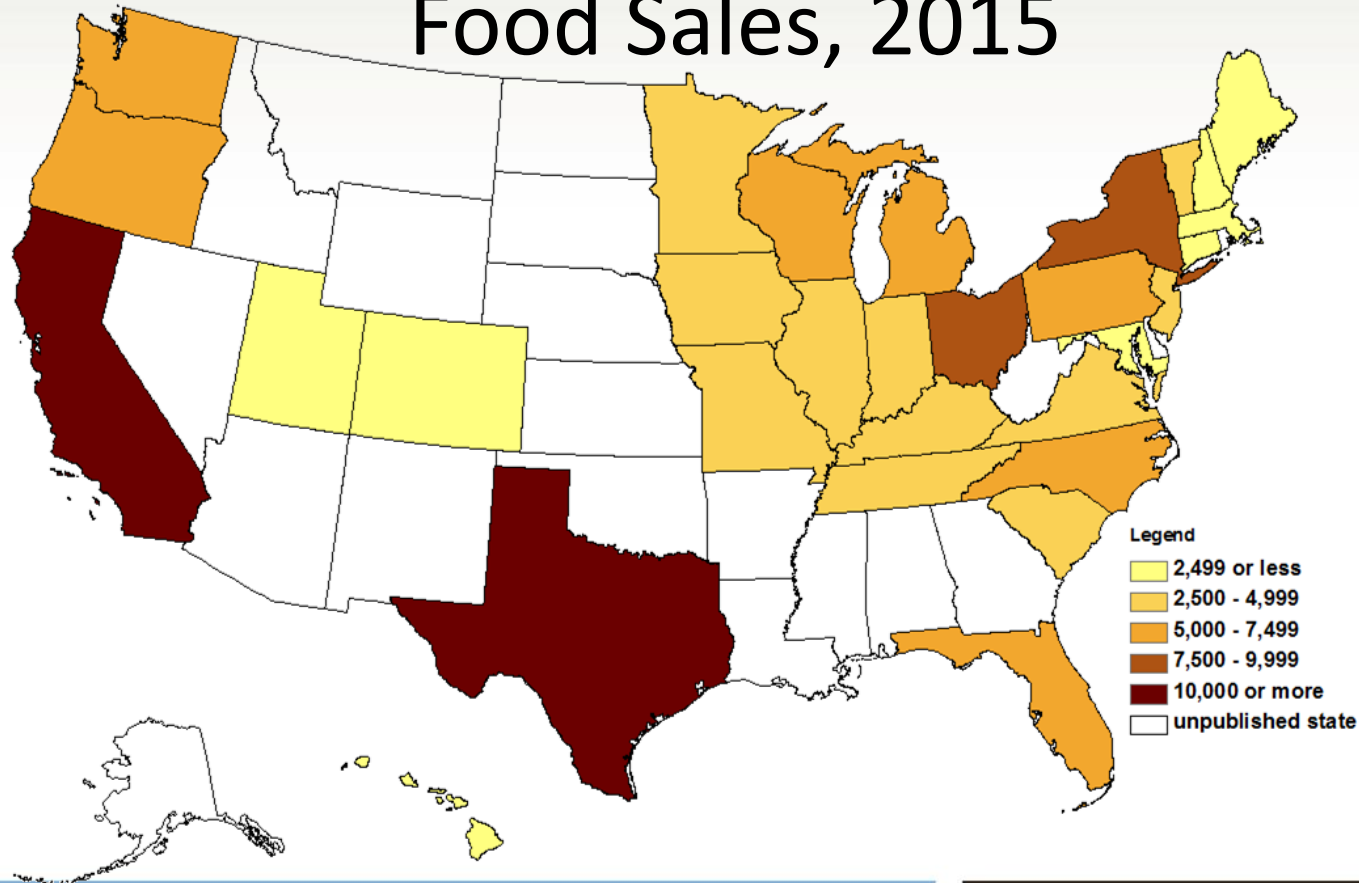
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Total Number of Operations with Direct Food Sales, 2015



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Total Number of Operations with Direct Food Sales, 2015

Top Five States

States	Number of Operations	Operations (percent of total)
California	14,315	9
Texas	11,078	7
New York	7,865	5
Ohio	7,747	5
Wisconsin	7,414	4
US Total	167,009	

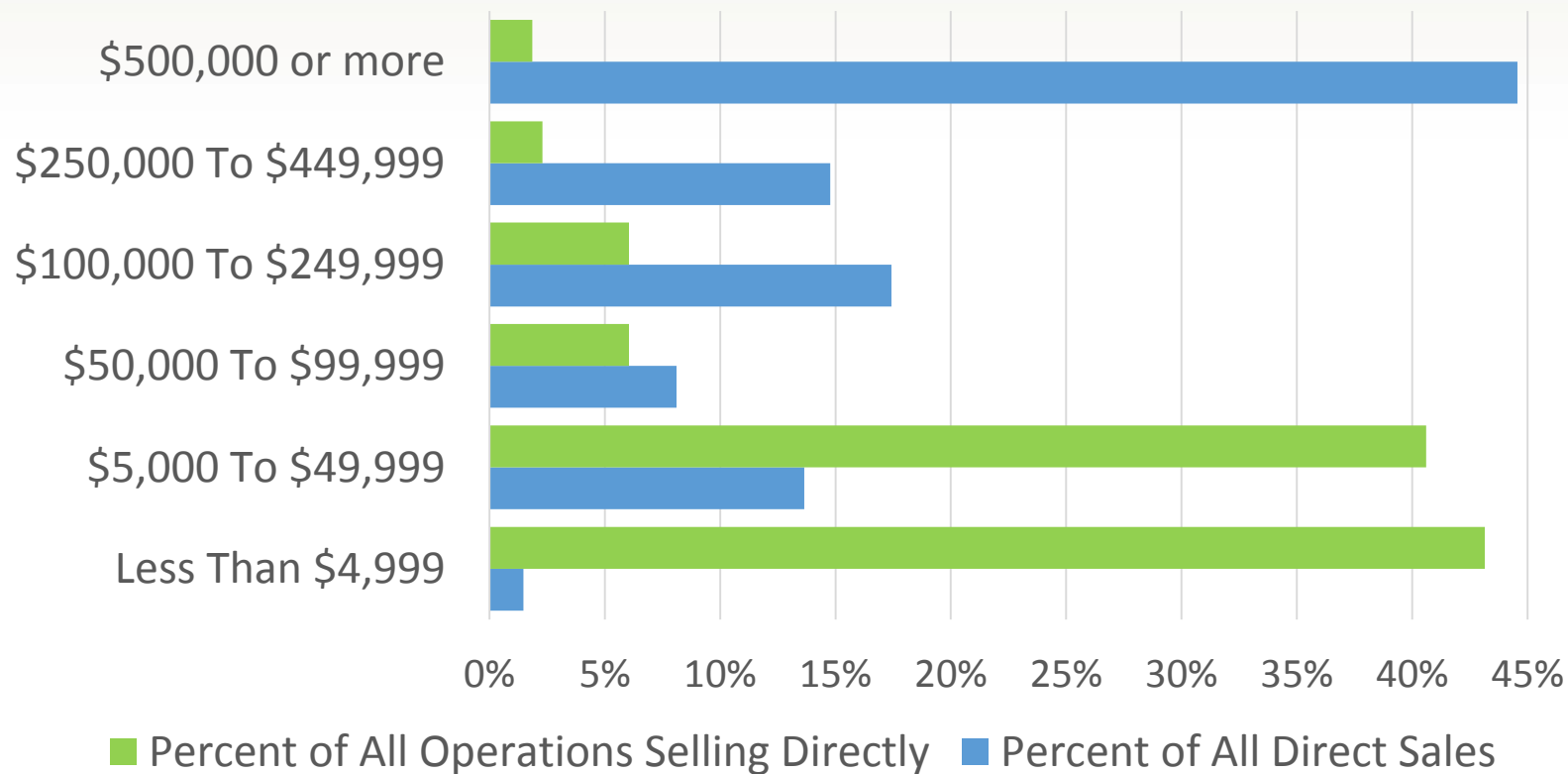
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Operations and Direct Sales by Sales Categories, 2015



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Marketing Channels

Direct to Consumers

Direct to Retailers

Direct Marketing Channels

Direct to Institutions

Intermediates who Locally Brand
Products

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Direct Sales by Marketing Channel



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Directly Marketed Sales of Food and Value Added Food Products Sold by Farms, 2015

Practice	Sales (\$billion)	Number of Operations
Direct to Institutions/Intermediates	3.4	59,911
Direct to Consumers	3.0	114,801
Direct to Retailers	2.3	23,624

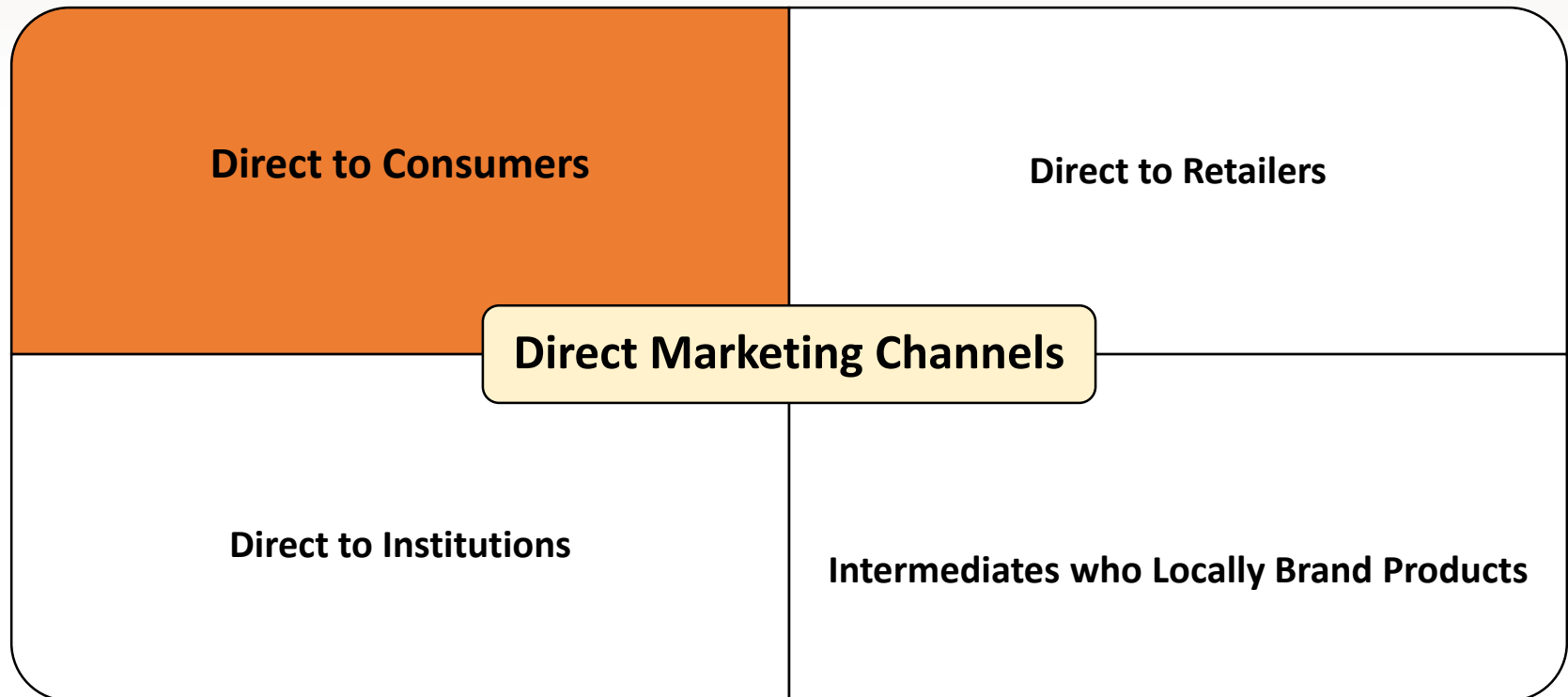
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Direct to Consumers



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Direct to Consumers: Sales and Number of Operations by Marketing Practices, 2015

Marketing Practice	Sales (\$million)	Sales (percent of total)	Number of Operations
On Farm Store	1,322	44	51,422
Farmers Market	711	23	41,156
Other Markets	360	12	39,765
Off Farm Store or Stand	236	8	14,959
CSA	226	7	7,398
Online Marketplaces	172	6	9,460
Total Direct to Consumer	3,027	100	114,801

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Direct to Consumers: Sales and Number of Operations by Type of Sales, 2015

Sale Type	2015 (\$million)	Sales (percent of total)	Number of Operations
Commodities Sold	1,614	53	58,560
Value Added Products Sold	1,412	47	74,738
Direct to Consumer Products Sold	3,027	100	114,801

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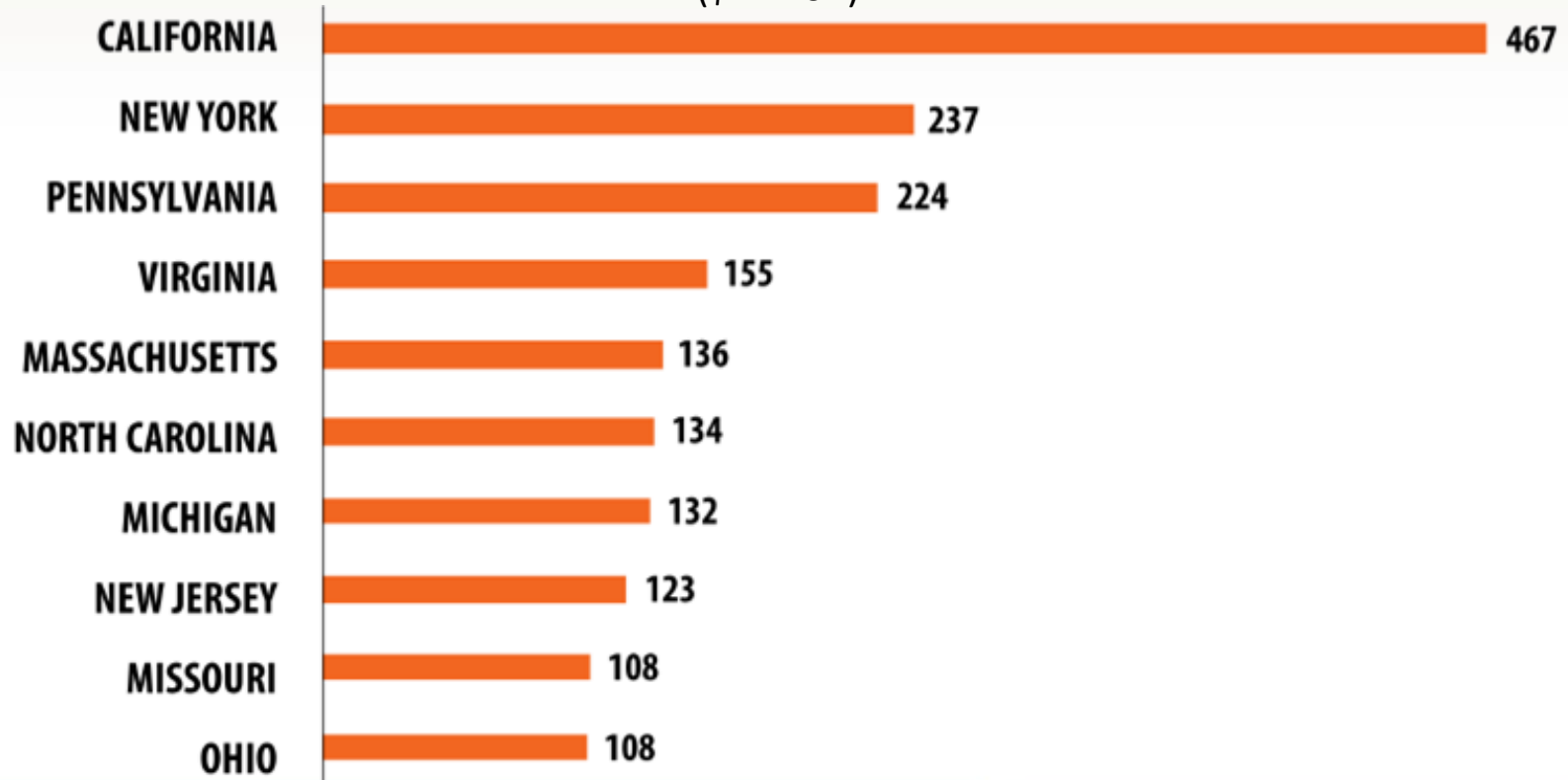


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Direct to Consumers: Sales, 2015

Top Ten States

(\$million)



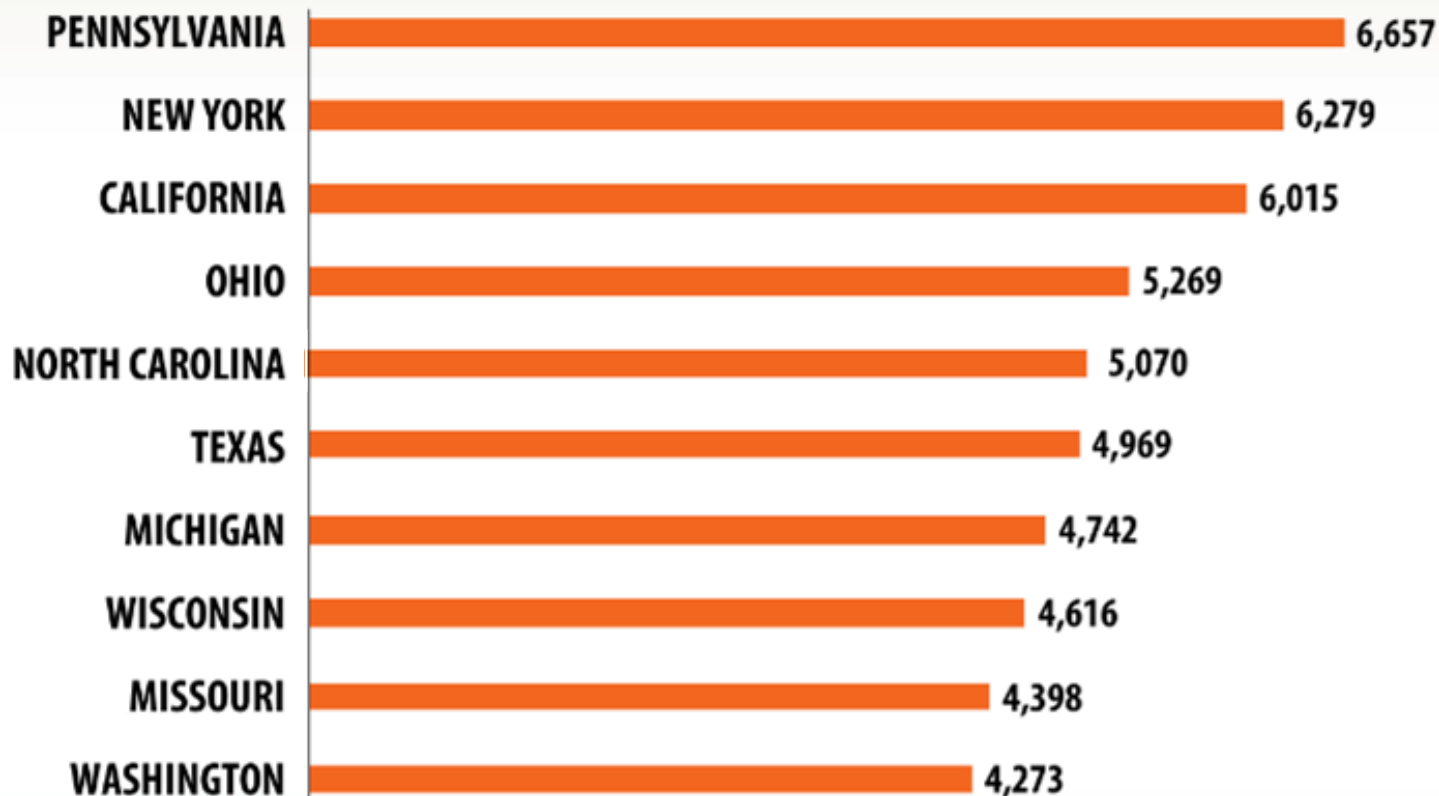
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Direct to Consumers: Number of Operations, 2015 Top Ten States



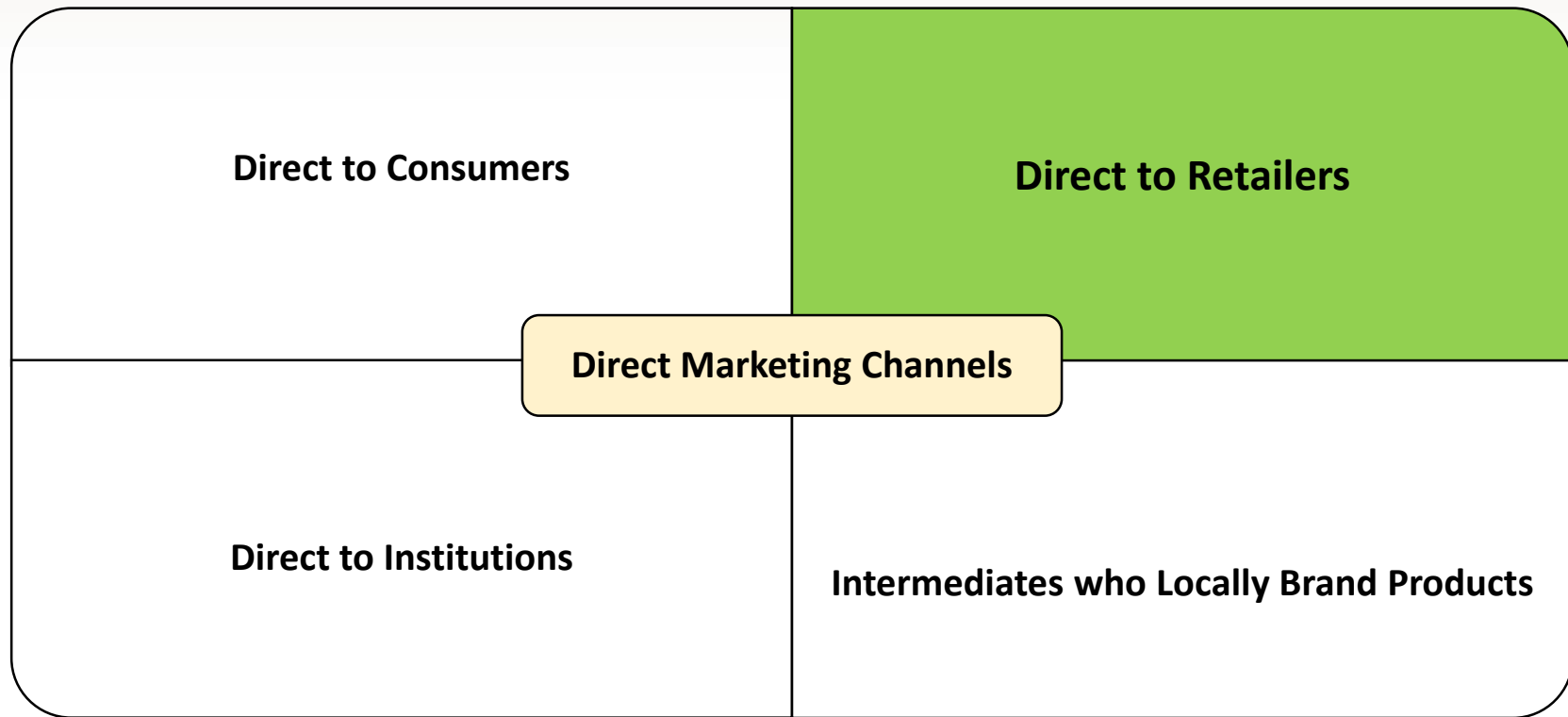
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Direct to Retailers



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Direct to Retailers: Number of Operations by Marketing Practices, 2015

Marketing Practice	Number Operations
Restaurants and Caterers	10,988
Supermarkets and Supercenters	8,479

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Direct to Retailers: Sales and Number of Operations by Type of Sales, 2015

Sales Type	Sales (\$million)	Sales (percent of total)	Number of Operations
Commodities Sold	1,506	64	14,762
Value Added Products Sold	833	36	11,441
Direct to Retail Products	2,339	100	23,624

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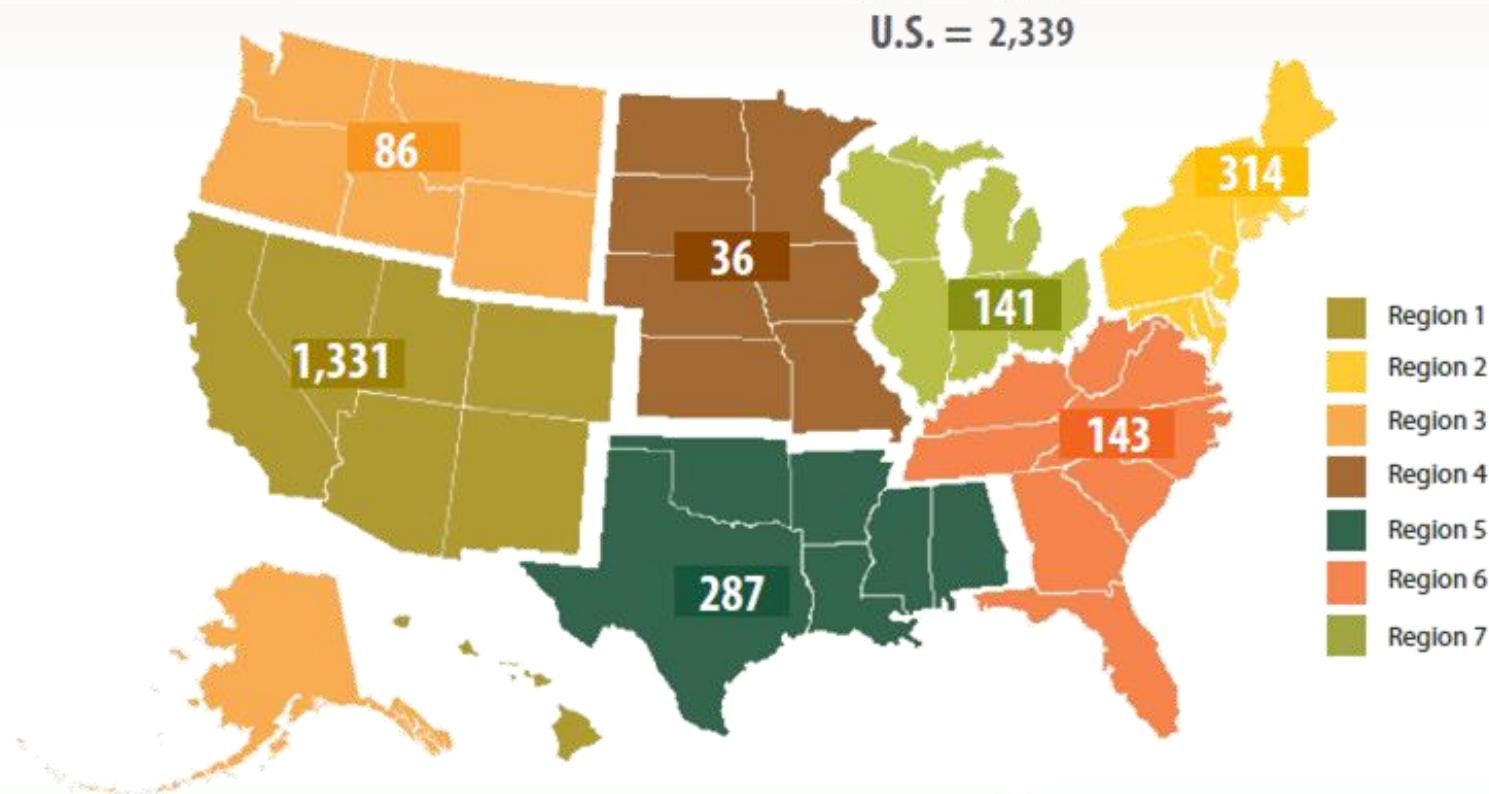
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Direct to Retailers: Food Sales by Region, 2015

(\$million)



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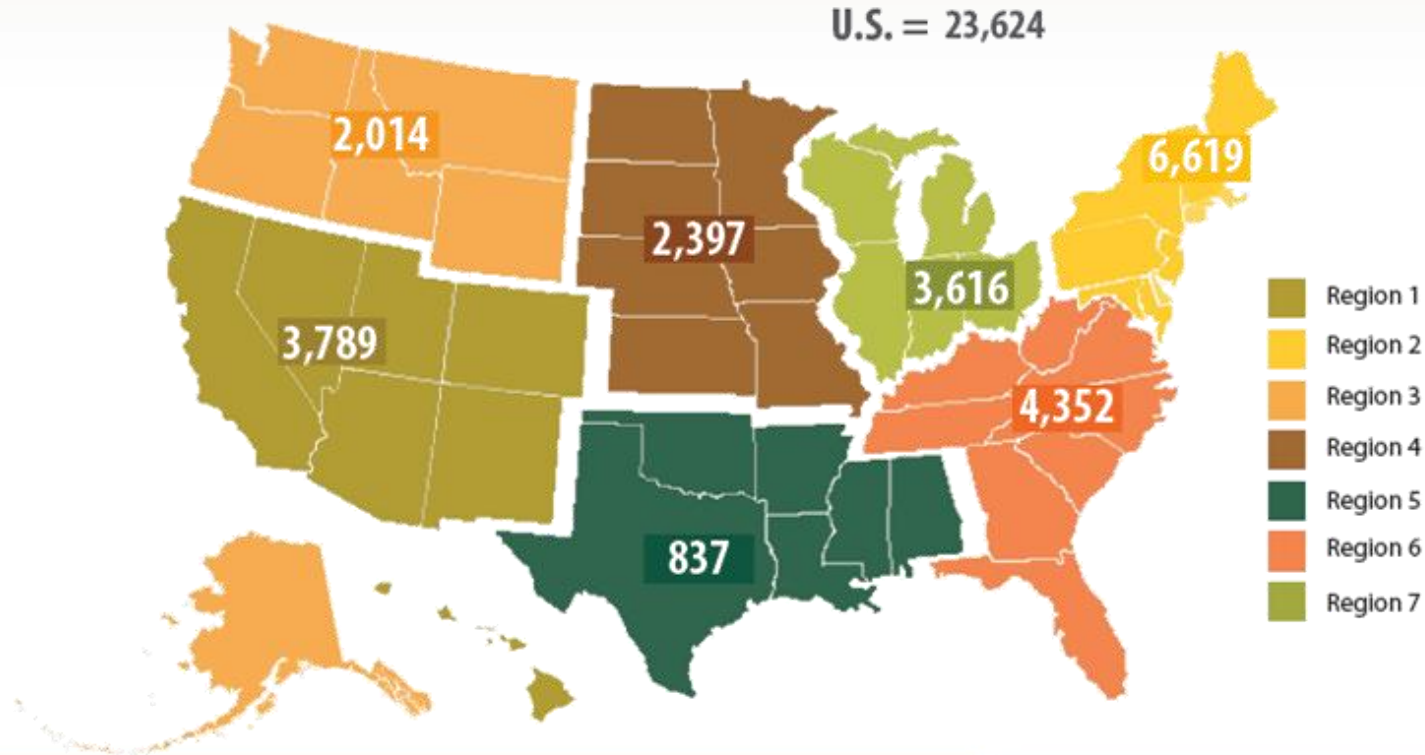
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Direct to Retailers: Number of Operations by Region, 2015

(number)



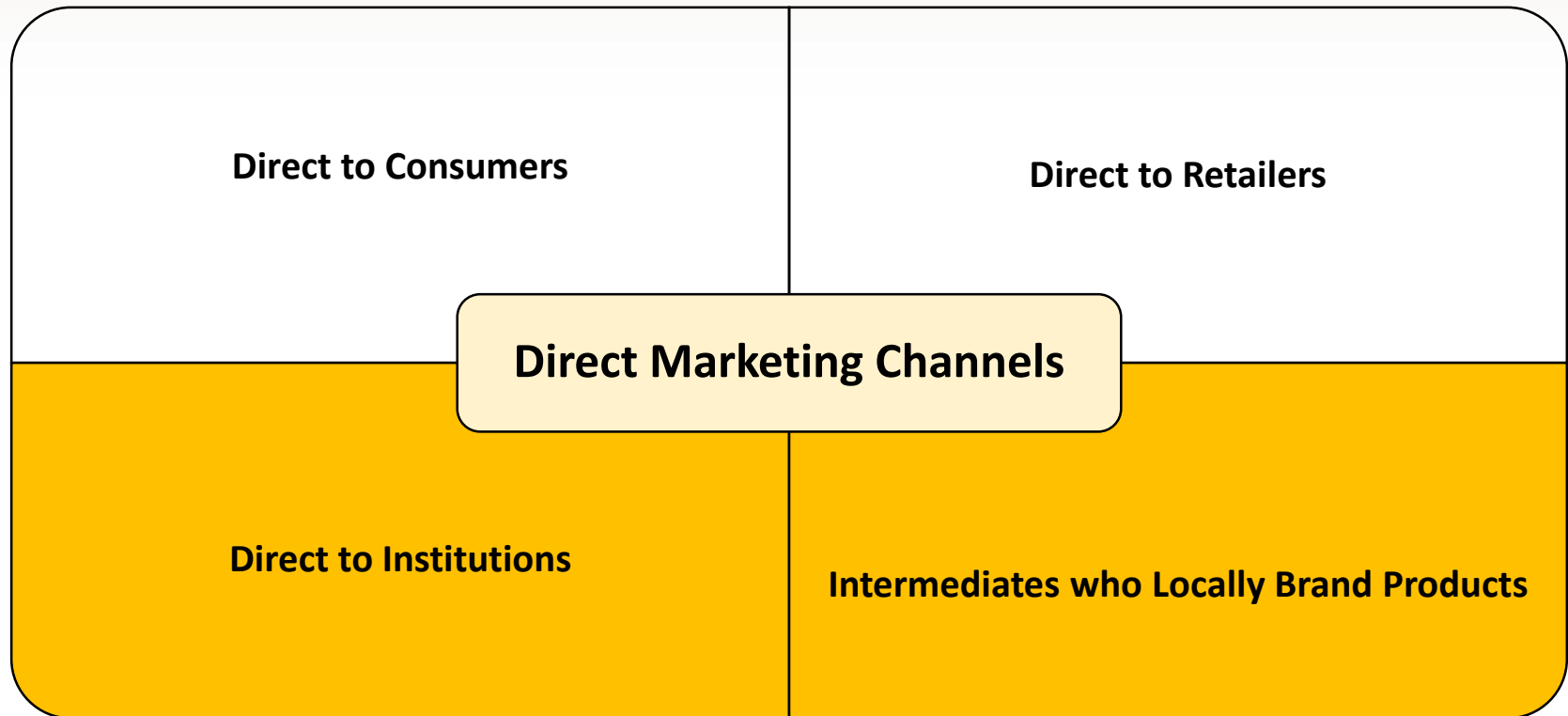
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Direct to Institutions and Intermediates



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Direct to Institutions and Intermediates: Sales and Number of Operations by Type of Sales, 2015

Sales Type	Sales (\$million)	Number of Operations
Commodity	1,711	25,004
Value Added	1,670	36,765
Total Direct to Institutions and Intermediates	3,382	59,911

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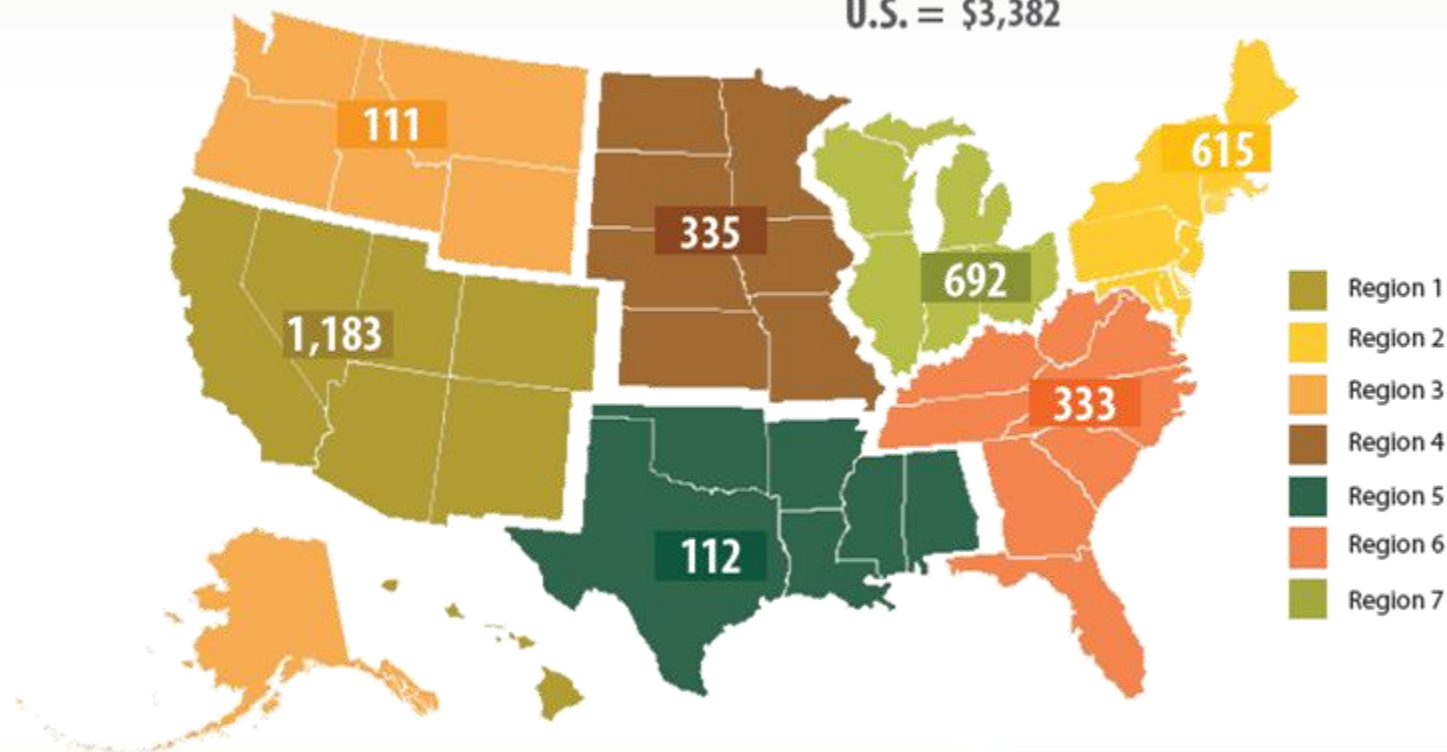


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Direct to Institutions and Intermediates: Food Sales by Region, 2015

(\$million)

U.S. = \$3,382



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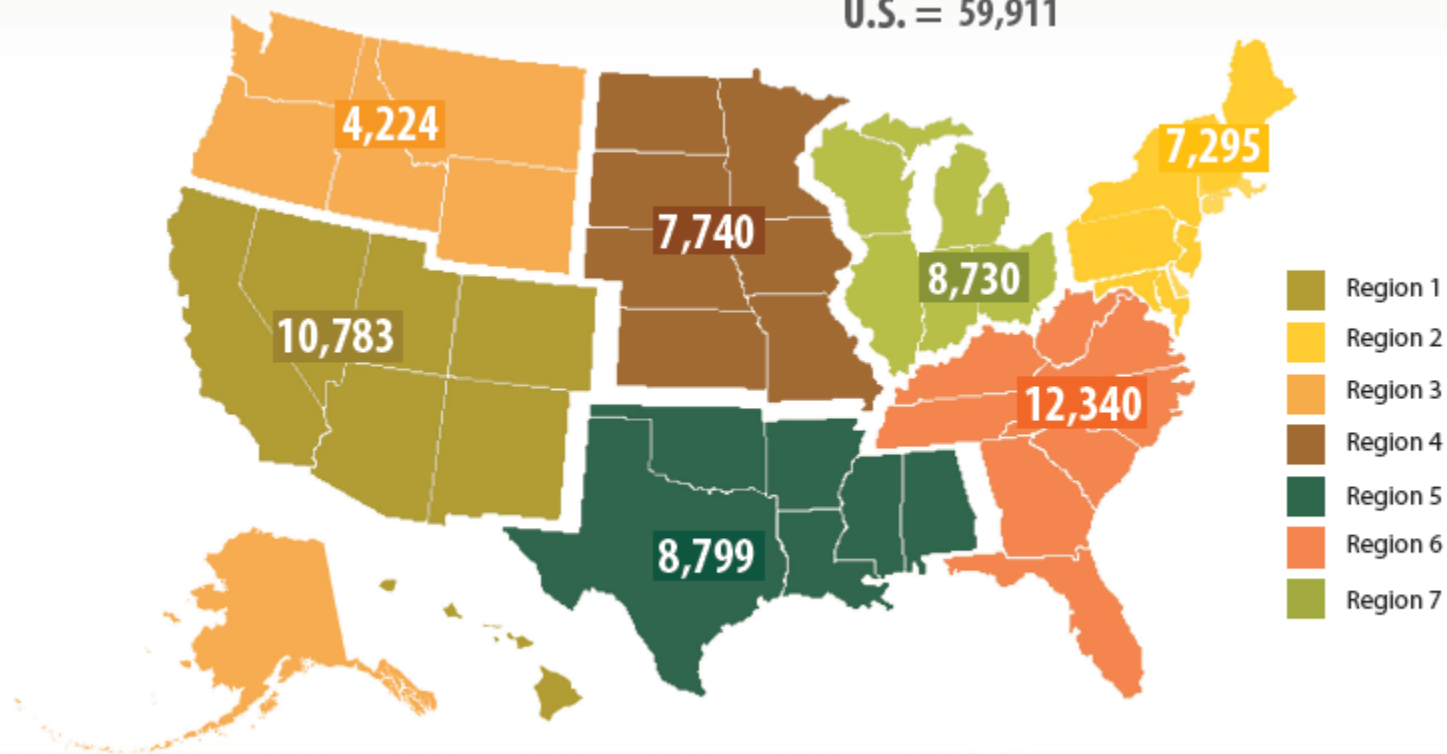


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Direct to Institutions and Intermediates: Number of Operations by Region, 2015

(number)

U.S. = 59,911



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Food Commodities Sold Directly



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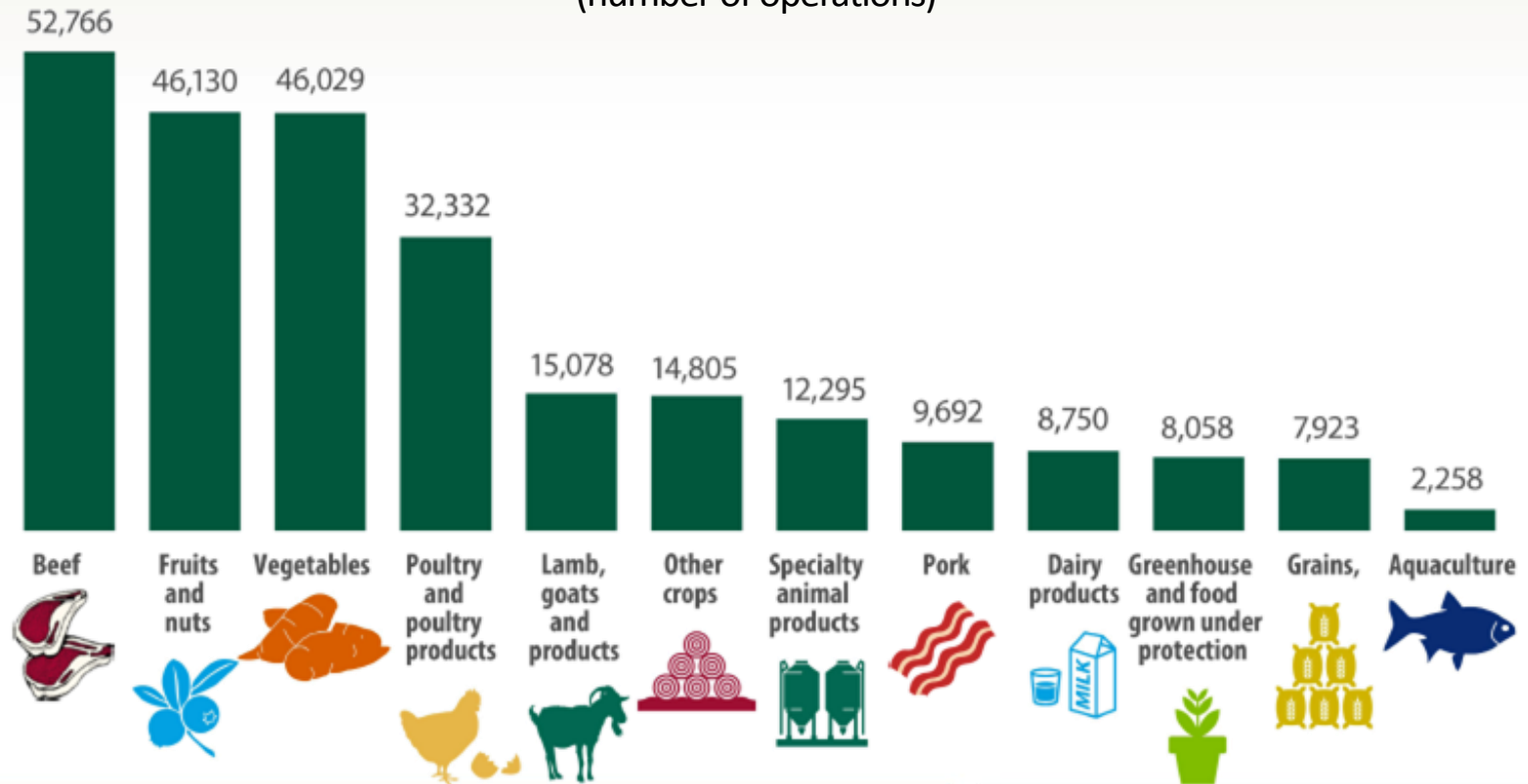
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Food Commodities Sold Directly Through All Marketing Channels at the U.S. Level, 2015

(number of operations)



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Mileage and Location of Direct Marketing

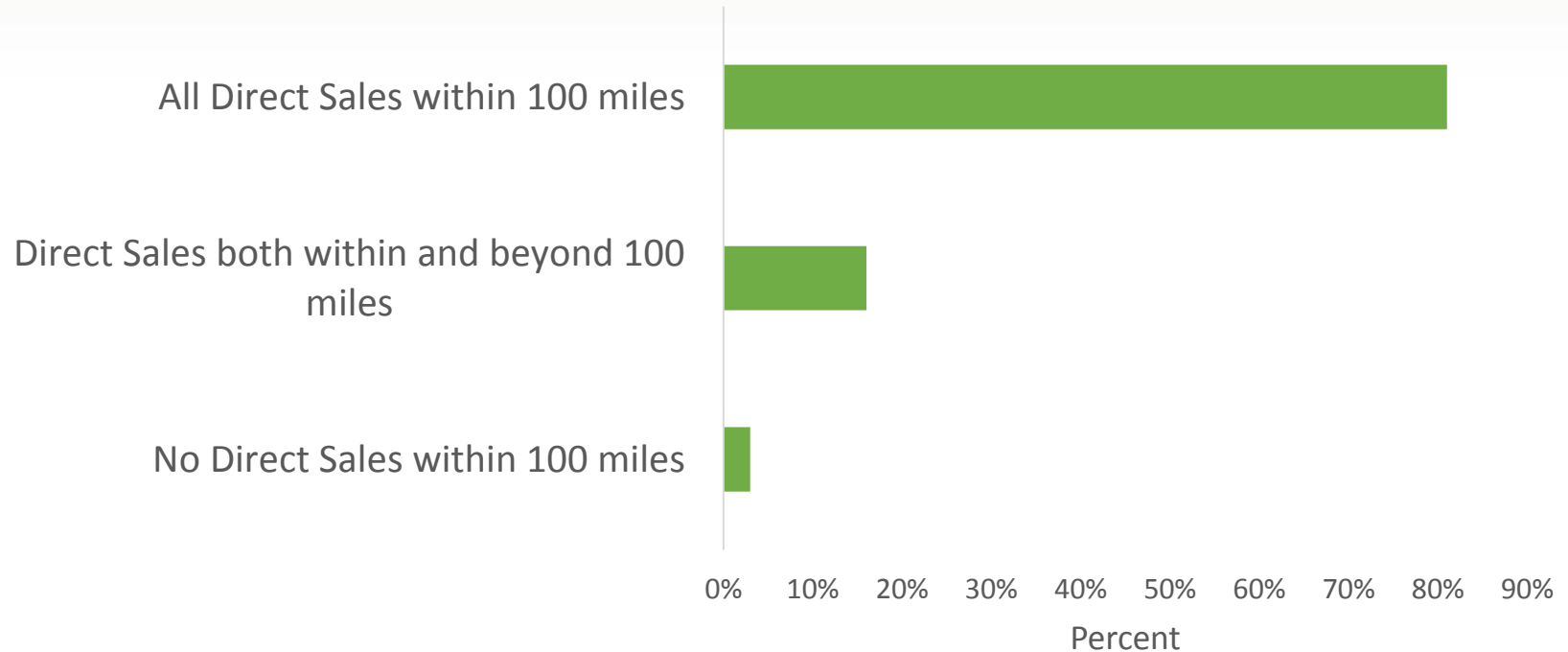


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Mileage Operations Traveled to Directly Market Food, 2015



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Distance To The Largest Grossing Marketplace by Practice, 2015

(percent)

Practice	0 TO 20 MILES	21 TO 40 MILES	41 TO 60 MILES	61 TO 100 MILES	101 OR MORE MILES
Farmers Market	61	21	8	7	2
Off Farm Store	68	21	6	5	1
CSA	53	19	7	8	13
Supermarkets	46	23	8	14	9
Restaurants	53	19	9	13	6
On Farm Store	100	0	0	0	0

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Operation and Operator Characteristics



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Number of Years Operations have used Direct Marketing Practices, 2015

(percent)

Marketing Channel	1 to 5 Years	6 to 10 Years	11 to 20 Years	21 + Years
Direct to Consumer	24	24	25	27
Direct to Retail	31	23	21	25

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Characteristics of Farm Operators with Direct Sales, 2015

(percent)

	Farms w/ Direct Sales	All Farms (2012 Census of Agriculture)
Female Operators	38	31
Primary occupation is farming	41	44
Under 35 years old	9	8
Less than 10 years farming	23	22
US Military Veteran	14	n/a

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Operations Accepting SNAP Payments, 2015



8 percent

Percent of farms selling directly to consumers who accept payments from the supplemental nutrition assistance program (SNAP).



90 percent

Percent of those accepting SNAP do so while selling at a Farmers Market.



19 percent

Percent of operations selling at a Farmers Market who reported accepting SNAP.

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Internet Usage

- 70% of all farms had internet access in 2015, based on the computer usage report from the June Area Survey.
- **73% of farms using direct marketing practices had access to the internet in 2015.**
- 17% of farms using direct marketing practices host **websites for their farms**
 - 84% of those websites promote the farm's history.
 - 82% are used to promote the farm's production.
 - 29% offer a platform for selling agricultural goods.

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Key Findings

- 167,009 operations sold \$8.7 billion of food through direct marketing practices in 2015.
- Direct to Consumer was the most popular form of direct marketing, accounting for 69% of the total number of operations using direct marketing practices to sell food, but only accounting for 35% of total sales.
- California accounted for the largest share of direct sales with \$2.8 billion of sales, 33% of the US total.
- Operations with direct food sales of \$500,000 or more, accounted for 2% of all direct marketing operations, but received 45% of direct marketing income.
- 81% of operations sold all their directly marketed food within 100 miles of the farm.

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The Local Food Marketing Practices Release

- Data is available through Quick Stats. Queries focused on data from this release are available Local Food Landing Page below:

https://www.agcensus.usda.gov/Publications/Local_Food/index.php

Access the Data

View and download the 2015 Local Food Marketing Practices data from the NASS Quick Stats d:

By Geographic Region: [National](#) | [Region](#) | [State](#)

By Topic:

Direct Marketed Sales of Food

- [Total Direct Marketed Sales of Food and Number of Farms Selling Directly](#)
- [Total Directed Marketed Sales of Food by Direct Sales Class](#)
- [Commodity Sales and Number of Farms Selling Directly](#)
- [Value Added Sales and Number of Farms Selling Directly](#)
- [Sales by Direct Marketing Channel: Total, Commodities, and Value-Added](#)

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The Local Food Marketing Practices Release

- To access data from the Local Food Marketing Practices Survey using Quick Stats click the link below:

https://quickstats.nass.usda.gov/A1BE5DEE-26D0-329C-8F5A-B6804BDC881F?long_desc LIKE=directly

Quick Stats [Home](#)

Navigation History:

Select Commodity (one or more) 

Keyword Search [Hints](#)

Program:
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Sector:
ANIMALS & PRODUCTS
CROPS
DEMOGRAPHICS
ECONOMICS

Group:
AQUACULTURE
DAIRY
FARMS & LAND & ASSETS
FIELD CROPS
FRUIT & TREE NUTS
HORTICULTURE
INCOME
LIVESTOCK
OPERATORS

Commodity:
AQUACULTURE TOTALS
CATTLE
COMMODITY TOTALS
DAIRY PRODUCT TOTALS
FIELD CROPS, OTHER
FOOD CROP TOTALS
FRUIT & TREE NUT TOTALS
GRAIN
HOGS

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