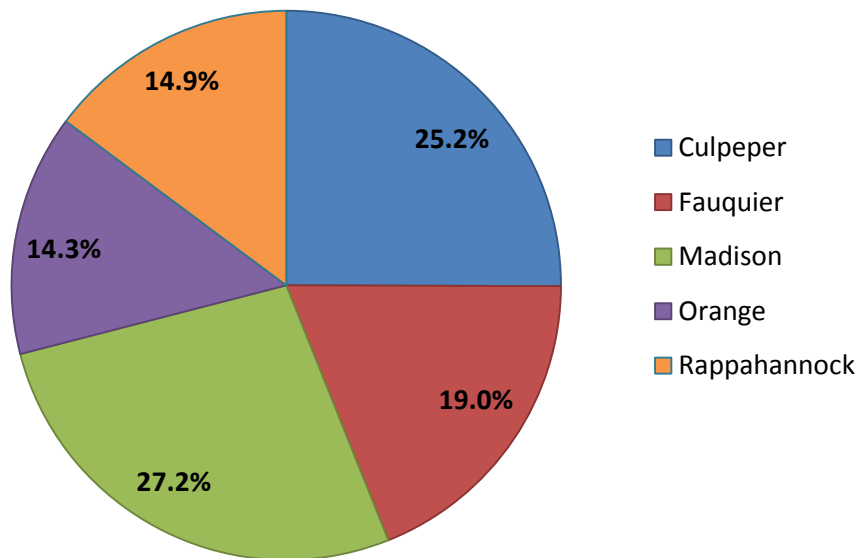


Rappahannock-Rapidan Regional Food System Producer Survey Results

April 16, 2015

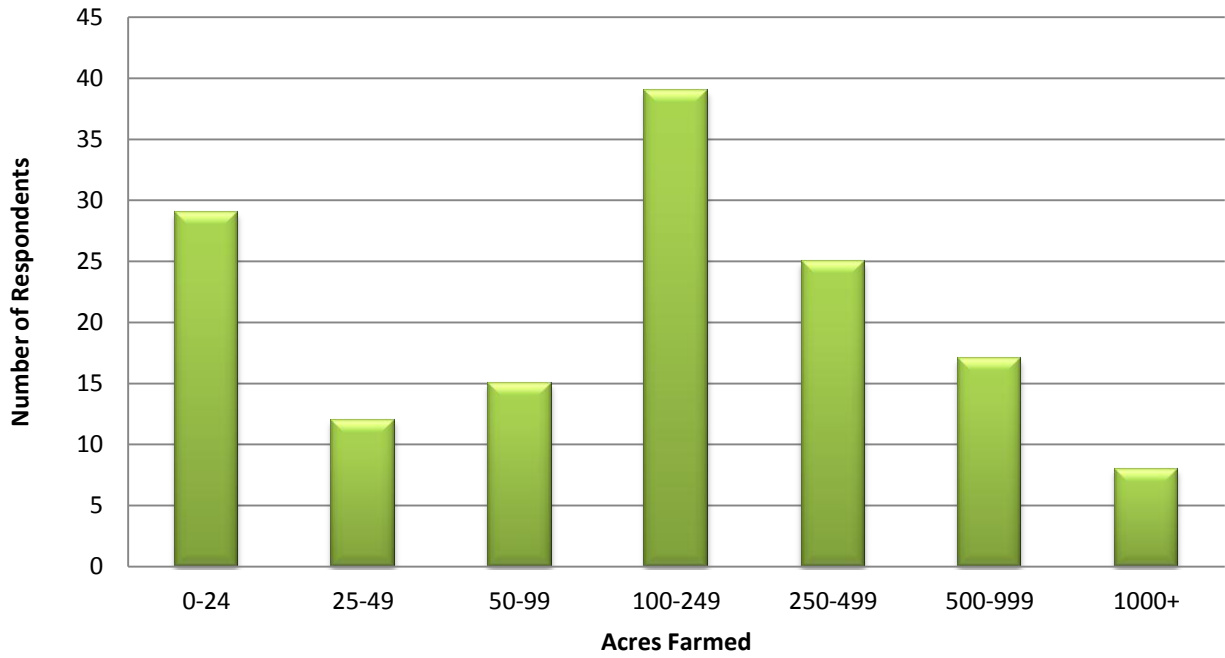
The survey was sent via email or mail to 1,052 producers of edible farm products within the Rappahannock-Rapidan region, which consists of Culpeper, Fauquier, Madison, Orange and Rappahannock Counties in March 2015. The mailing list included Piedmont Environmental Council’s Buy Fresh – Buy Local participants and contacts of the region’s Cooperative Extension Agents. Respondents were given two weeks to respond. 148 responses were received.

In which county is your farm located?



Answer Options	Response Percent	Response Count
Culpeper	25.2%	37
Fauquier	19.0%	28
Madison	27.2%	40
Orange	14.3%	21
Rappahannock	14.9%	22
<i>answered question</i>		148
<i>skipped question</i>		0

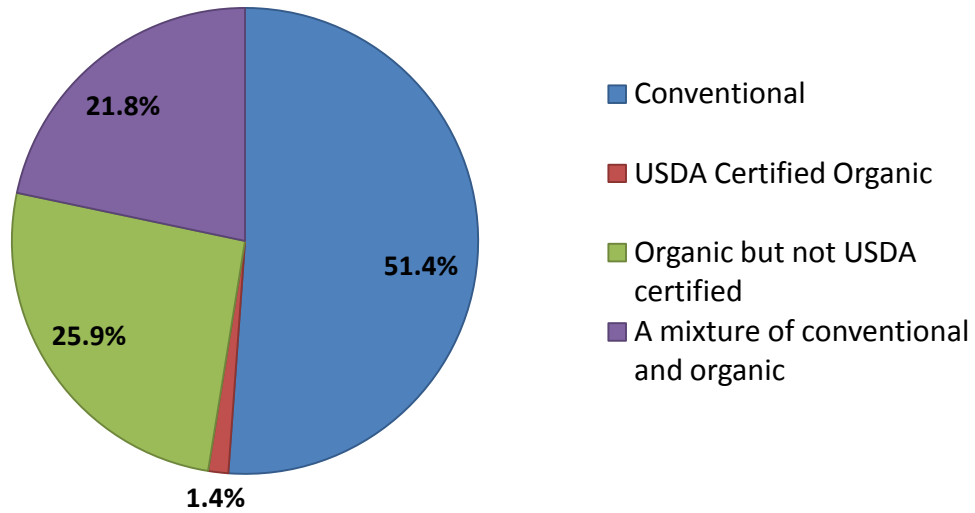
How many acres did you farm in 2014, including land you leased?



Answer Options	Response Count
	147
<i>answered question</i>	147
<i>skipped question</i>	1

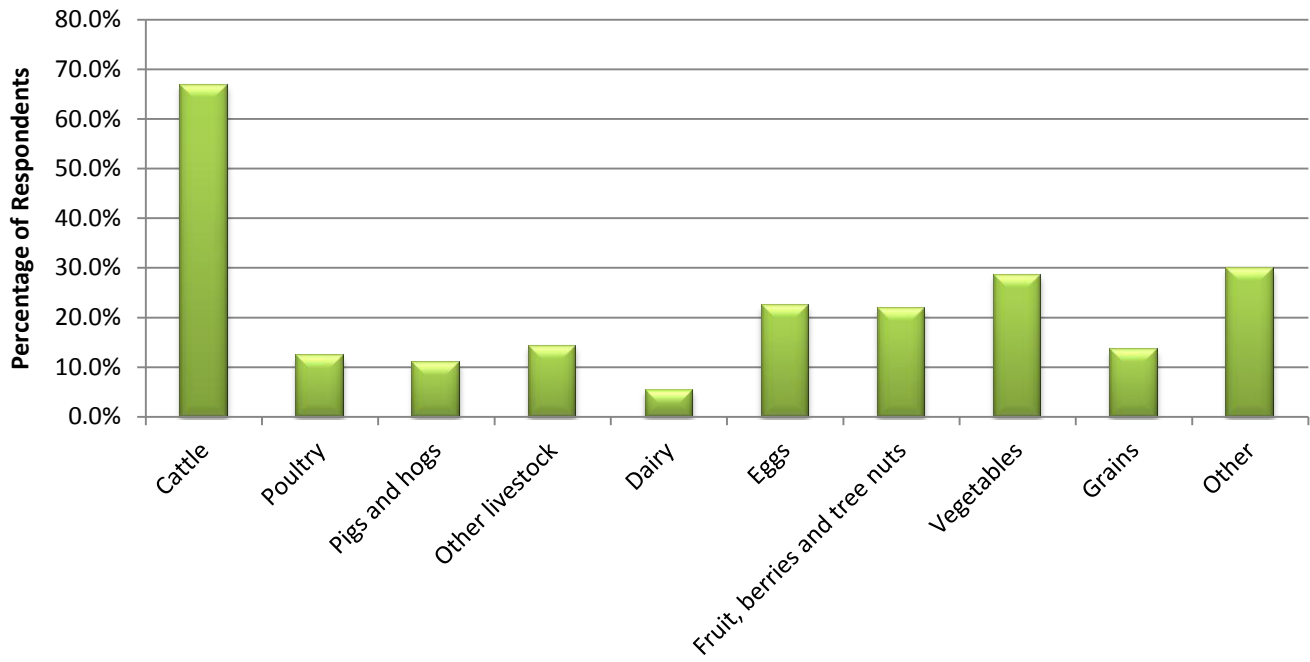
	Response Counts by Acres Farmed						
Total Acres	0-24	25-49	50-99	100-249	250-499	500-999	1000+
44,150	29	12	15	39	25	17	8

How would you describe your method of farming?



Answer Options	Response Percent	Response Count
Conventional	51.4%	76
USDA Certified Organic	1.4%	2
Organic but not USDA certified	25.9%	38
A mixture of conventional and organic	21.8%	32
<i>answered question</i>		148
<i>skipped question</i>		0

**Which of the following did your farm sell in 2014?
(Check all that apply)**

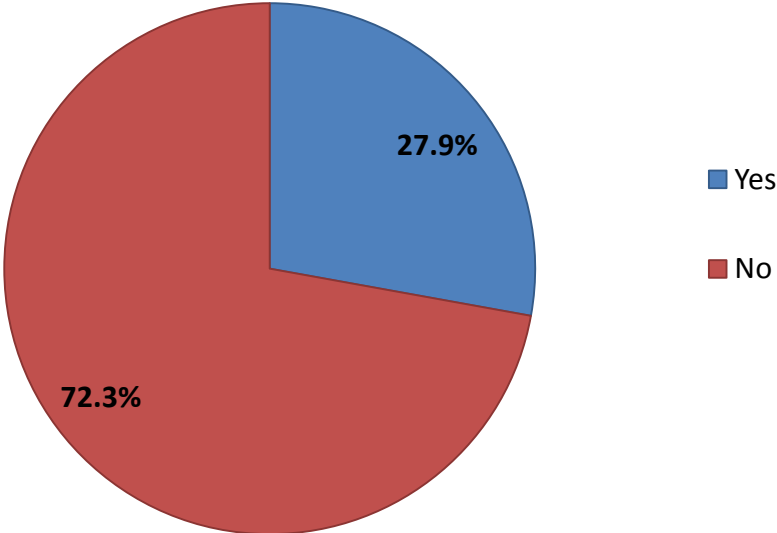


Answer Options	Response Percent	Response Count
Cattle	66.9%	99
Poultry	12.2%	18
Pigs and hogs	10.9%	16
Other livestock	14.3%	21
Dairy	5.4%	8
Eggs	22.4%	33
Fruit, berries and tree nuts	21.8%	32
Vegetables	28.6%	42
Grains	13.6%	20
Other	29.9%	44
<i>answered question</i>		148
<i>skipped question</i>		0

Other (Farm Products Sold In 2014)

- Christmas trees, shitake mushrooms, honey
- Hay
- Hay
- Honey
- Honey
- Hay, goats
- Lamb and custom grazing of cattle
- Hay
- Hay
- Hay
- Timber
- Hay
- Hay and straw
- Llamas and alpacas
- Honey
- Hay
- Wine tasting
- Hay
- Xmas trees
- Wool
- Hay
- Hay
- Wine
- LAMBS
- Vegetables
- Hay
- We are a herdshare dairy and will be combining a grade A system to prepare for an on-farm creamery.
- Herbs
- Truffle inoculated seedlings
- Mushrooms, honey, christmas trees
- Cut flowers
- Vineyard, horses, hay,
- Hay
- Mushrooms
- Goats and Llama wool
- Honey, herbs and value added products
- Honey
- Cut flowers
- Alpaca
- Mushrooms
- Wool
- Honey and hay
- Grapes/wine

Do you produce value-added products from your farm?

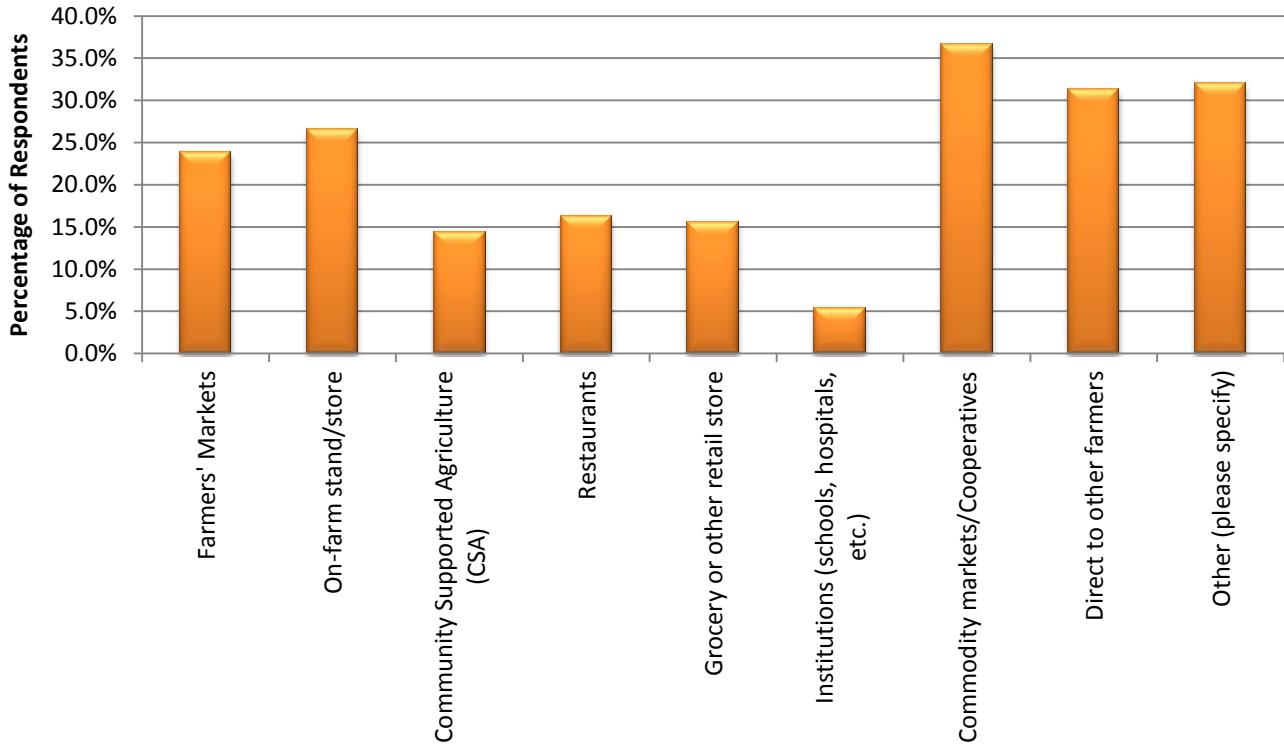


Answer Options	Response Percent	Response Count
Yes	27.9%	41
No	72.3%	107
If yes, please list the types of value-added products produced.		41
<i>answered question</i>		148
<i>skipped question</i>		0

Other (Value Added Products Produced)

- Beeswax candles, jams, Xmas garland and wreaths
- Honey
- Wine
- Beef, lamb
- Jams and jellies
- Jams and jellies
- Grass-finished beef retail cuts
- Soap from beef tallow
- Baked goods and jam
- Jams, jellies, hot sauce
- Xmas trees
- Jams
- Wine, pickled asparagus
- Freezer beef, pork and chicken
- Some wool products. Very small percentage of farm product.
- We are a CSA. With several hundred members in the DC area
- Fluid milk, cream
- Grass-fed beef by mixed quarter or half
- Jams, sauces, baked goods, crafts, plants
- Wool products
- Jams, beeswax candles
- Finished cattle; feed (corn, hay)
- Hay, beans, wheat, rye corn
- Broth, soaps, balms, baked goods, kombucha, apple products, etc.
- Ravioli, seacakes, Broth, Tincture, Tea mix,
- Sell processed beef, lamb, pork to consumers
- Hay
- Teas, salves, etc
- Jams, jellies, preserves, nuts
- I answered yes because I sell packaged meat products, but I don't prepare or package them.
- Alpaca Fleece sales to reach a break even point
- Grass-fed Beef
- Packaged meats from a USDA inspected abattoir
- Chicken broth/stock
- Pork and beef
- Smoking wood and verjus
- Grapes-wine goats cattle to restaurant on site
- Leather items, skulls, horn caps.
- Relish, pickles
- Apples

Which of the following market channels do you use to sell your products? (Check all that apply)

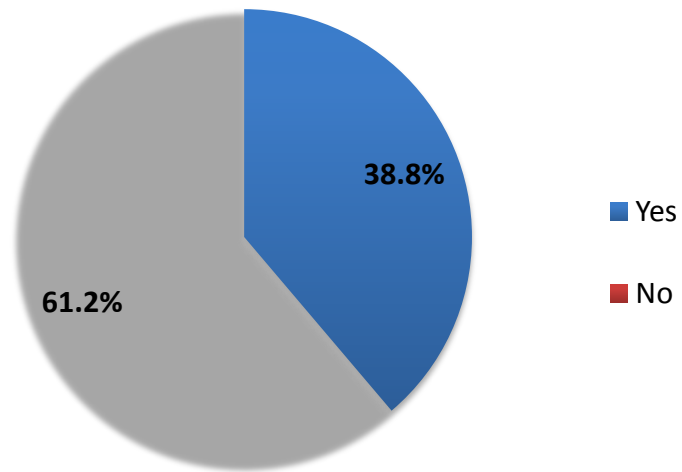


Answer Options	Response Percent	Response Count
Farmers' Markets	23.8%	35
On-farm stand/store	26.5%	39
Community Supported Agriculture (CSA)	14.3%	21
Restaurants	16.3%	24
Grocery or other retail store	15.6%	23
Institutions (schools, hospitals, etc.)	5.4%	8
Commodity markets/Cooperatives	36.7%	54
Direct to other farmers	31.3%	46
Other (please specify)	32.0%	47
<i>answered question</i>		147
<i>skipped question</i>		1

Other (Market Channels Used)

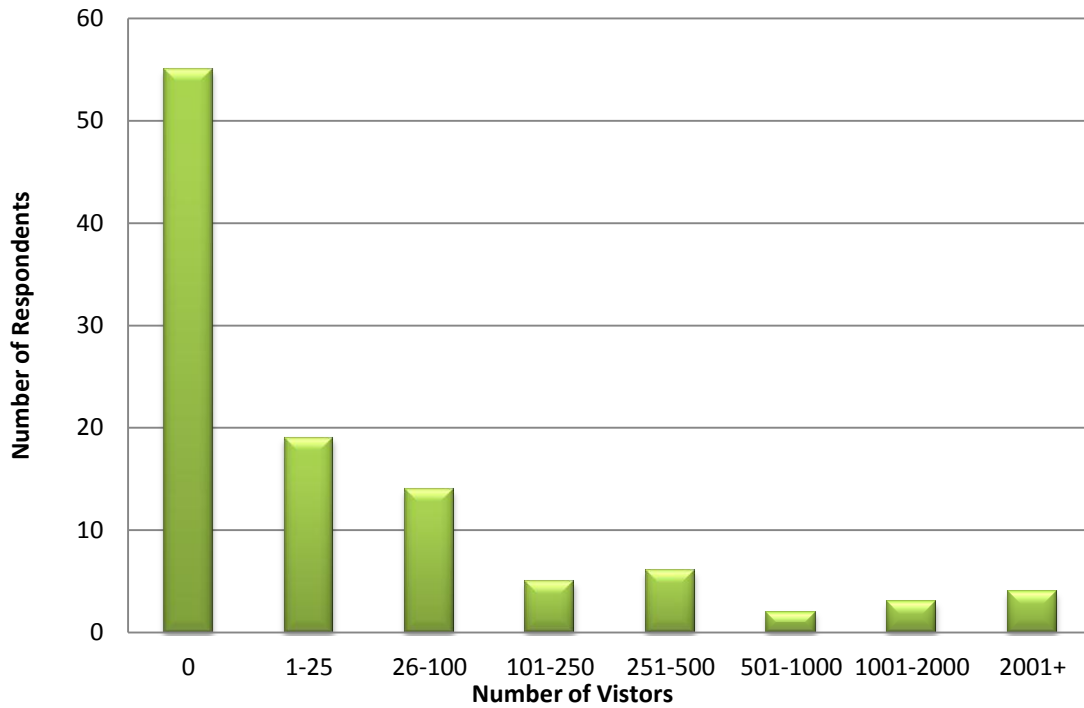
- Direct-to-consumer
- Internet and word-of-mouth
- Wineries
- Stock sales
- Internet
- Customer direct
- CAE locally
- Direct-to-consumer
- U-pick
- State Graded Sale Private Treaty
- None; given to food closet and friends
- Pick-your-own; word-of-mouth
- Website, newspaper, facebook, VCTGA, NCTA
- Graded lamb sales
- Co-op
- Horse Owners
- Virginia Feeder Calf Auctions/Sales
- Word-of-mouth
- Tele-auctions
- Stock yard
- 10+ drop locations in NOVA
- Word of mouth
- Festivals and art businesses
- Livestock Market
- Florists
- Auctions/cattle buyers
- Auctions, vineyard for sale I f grapes
- Direct to consumer
- Commercially
- Packers
- On FARM sales
- Direct to consumers
- Direct market to consumer
- Taken produce to food bank
- Sold to broker
- Online
- Livestock markets
- Wool pool
- National alpaca organization and website
- I sell by the side - no farm store or stand
- Friends & family
- Distributors
- Wine clubs
- Tourist direct
- The internet, sites like Facebook
- Livestock exchange
- Freezers placed in gyms/Direct-to-consumer

Did you receive visitors for tourism or recreation on your farm in 2014?



Answer Options	Response Percent	Response Count
Yes	38.8%	57
No	61.2%	90
<i>answered question</i>		147
<i>skipped question</i>		1

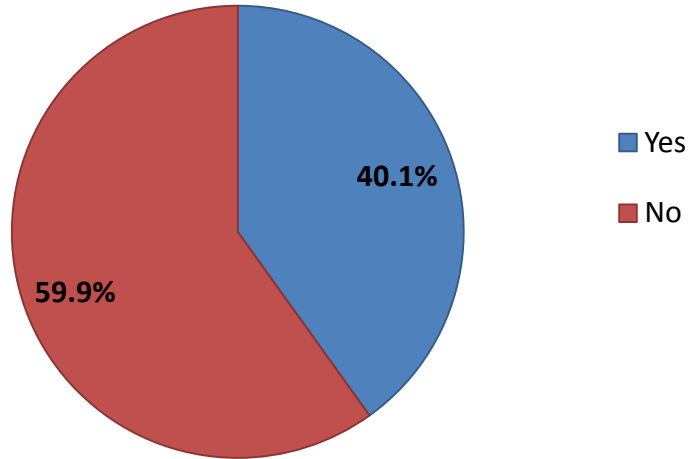
How many visitors did your farm have for agri-tourism or recreation activities in 2014?



Answer Options	Response Count
	109
<i>answered question</i>	109
<i>skipped question</i>	39

Total Visitors	Response Counts by Number of Visitors							
	0	1-25	26-100	101-250	251-500	501-1000	1001-2000	2001+
147,742	55	19	14	5	6	2	3	4

Do you participate in collective marketing efforts such as farm product directories, agriculture/winery trails, state/local labels, etc?



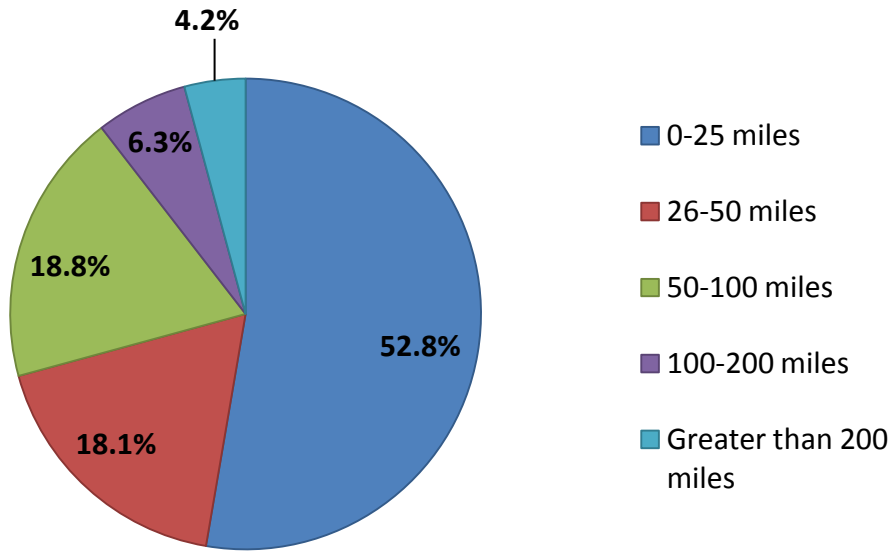
Answer Options	Response Percent	Response Count
Yes	40.1%	59
No	59.9%	88
<i>answered question</i>		147
<i>skipped question</i>		1

What additional marketing assistance would you like to see?

- We are good - we sell all we grow. Over the last 30 years there has been great improvement in presenting farms and farming to the public. Much of the credit is yours.
- I would like to advertise/participate in this directory but need info concerning registration and deadlines
- Not aware of options
- More signs on major road leading to the winery
- Greater promotion of all local/regional products
- Directory
- The ag/wine trails require a website, and they won't accept a Facebook site, so too much trouble and expense to be listed.
- Marketing to restaurants
- TV ads
- Bring back Agricultural Products and Service Directory Book for Culpeper.
- Everything that would make my food service better.
- Metro area papers
- N/A. My pick-you-own is word-of-mouth only.
- Farmstay hospitality
- Point-of-sale systems at reasonable prices; farm signs allowed on state roads (discount cost through tourist oriented directional signs system)
- Differentiate grassfed cattle
- Promotion of local products produced on the farm; education of food safety and quality from buying local and knowing where your food comes from
- More effort for restaurants to purchase local wine
- Base price for livestock
- No cost participation at farmers market
- Advertising and collective activities
- Convince EPA that sheep don't stand in creeks
- We need help cracking google. Our farm does not appear unless the parameters are specific. Ie Bull Run Mountain Farm CSA.
- Not sure
- Raw milk certified by state and allowed for retail sale
- We need a good website. Don't know where to start that won't cost a fortune
- Not sure

- Cut flowers and vegetables if possible
- Get Va. BQA labels approved by USDA
- Existing markets are relatively strong & diverse, much more return could be made improving the economics of production with increases in innovation and know how.
- Promoting restaurants that use a percentage of local, sustainable food.
- Better signage
- More co-ops. Promote locker lambs/poultry
- More newspaper ads.
- We personally do not need additional marketing assistance
- Not sure yet
- Brokers between local producers and consumers
- Writing business plans, grant writing
- More promotion of local farmers' markets.
- More support for sheep and wool products
- More county farm tours
- Live cattle
- I need access to ag infrastructure - not assistance.
- Assistance in grant applications
- Cooperatives
- Help connecting with end users
- Food hubs
- More publicity about Madison County wineries
- Media and state sponsored promotion of specific farm products
- Wholesale
- Social media, collective selling

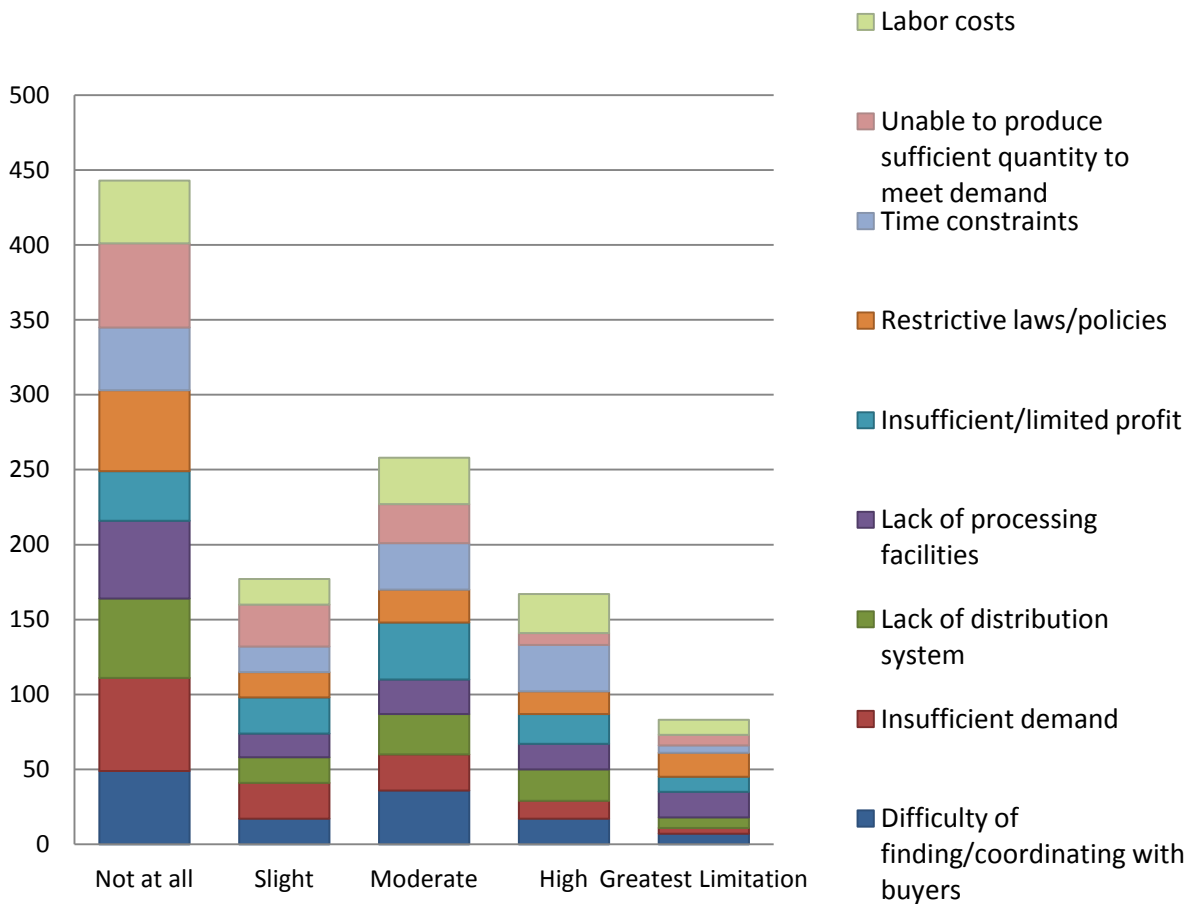
What is the typical distance your products travel to your primary market?



Answer Options	Response Percent	Response Count
0-25 miles	52.8%	76
26-50 miles	18.1%	26
50-100 miles	18.8%	27
100-200 miles	6.3%	9
Greater than 200 miles	4.2%	6
<i>answered question</i>		144
<i>skipped question</i>		4

*Note: These results vary greatly from local observations, indicating there might have been some discrepancy in how respondents defined primary market. With almost 40% of respondents selling to commodity markets, many commodity producers might have used the distance to the initial point of sale or where the product left the farmer’s possession, instead of the final consumer. In many cases, the products are picked up at the farm, so the distance might have been erroneously assumed to be zero even though the products were trucked out-of-state for processing and sale to consumers.

To what degree do the following factors limit your selling of food products locally?

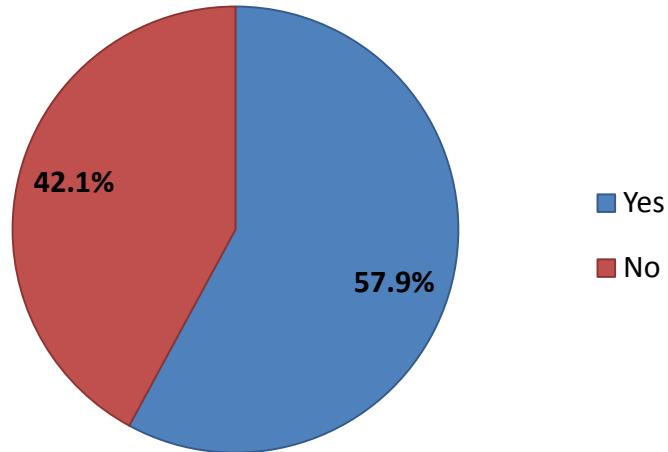


Answer Options	Not at all	Slight	Moderate	High	Greatest Limitation	Rating Average	Response Count
Difficulty of finding/coordinating with buyers	49	17	36	17	7	1.33	126
Insufficient demand	62	24	24	12	4	0.98	126
Lack of distribution system	53	17	27	21	7	1.30	125
Lack of processing facilities	52	16	23	17	17	1.45	125
Insufficient/limited profit	33	24	38	20	10	1.60	125
Restrictive laws/policies	54	17	22	15	16	1.37	124
Time constraints	42	17	31	31	5	1.52	126
Unable to produce sufficient quantity to meet demand	56	28	26	8	7	1.06	125
Labor costs	42	17	31	26	10	1.56	126
Other (please specify)							20
<i>answered question</i>							126
<i>skipped question</i>							22

Other (Factors That Limit Selling Food Products Locally)

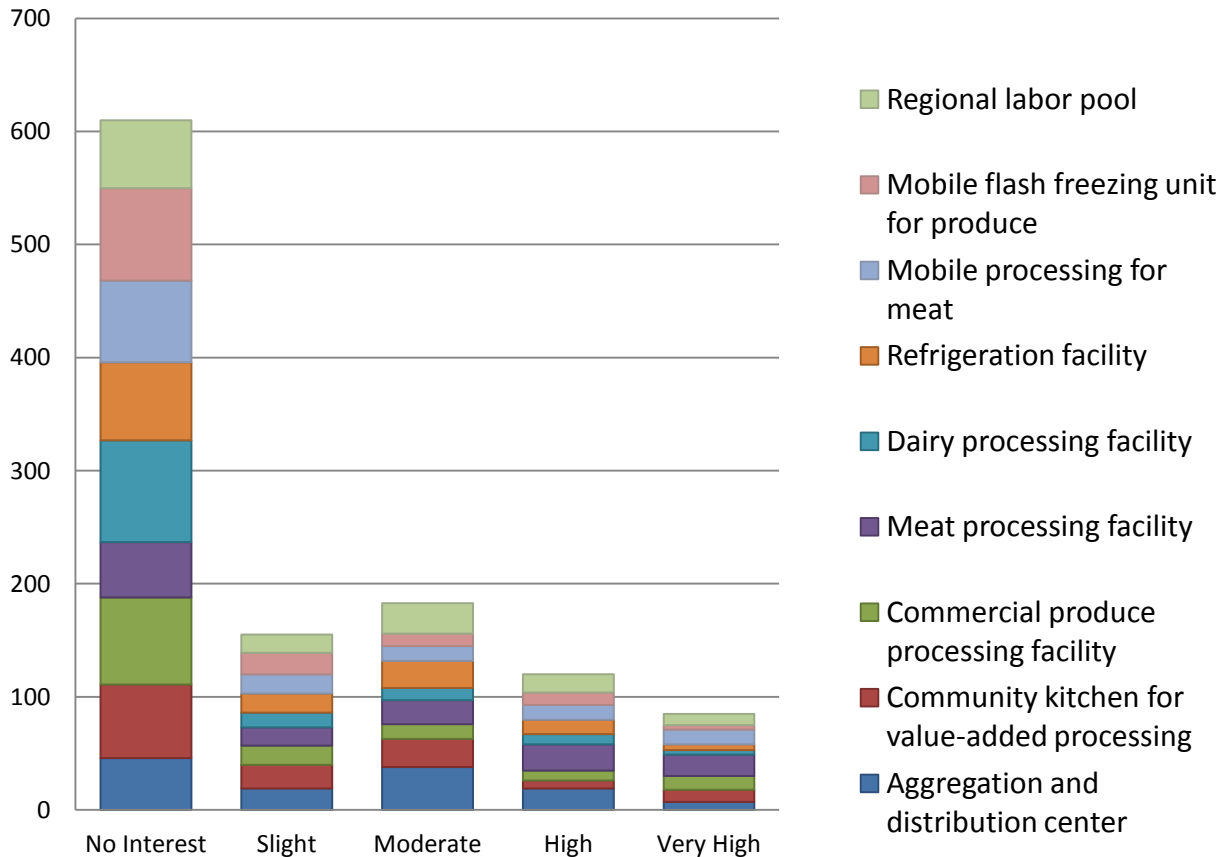
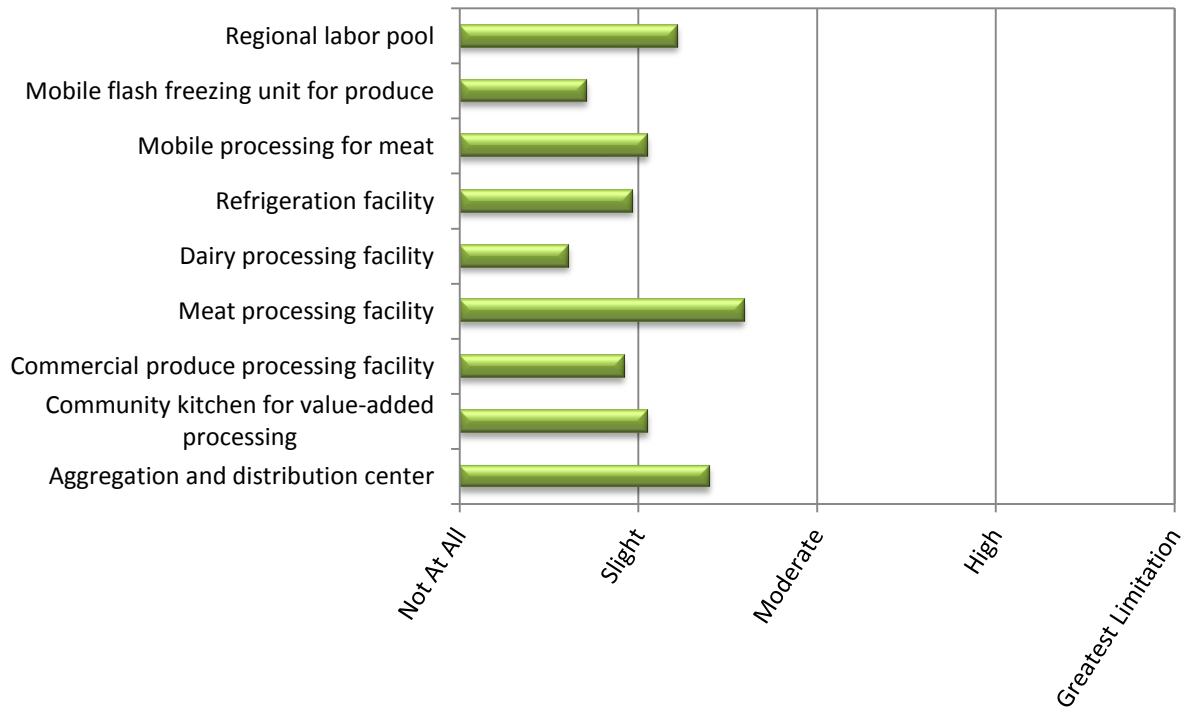
- There are no feed lots nearby
- Ignorance of consumer - High
- Do not want to sell locally
- Raw milk policies
- Unable to find quality labor.
- MD-VA Milk Producers Coop Markets my milk.
- Not enough land available in imediate area
- Cost to participate at farmers market
- Do not sell from farm
- High cost of labor, fuel for car to transport flowers
- Quality and skill of agricultural labor
- Our operating costs are too high, so our products are too expensive for restaurants
- I'm trying to explore the possibilities for a agra-vision
- Inventory management
- Trying to do all facets: from production, to processing, to sales, to distribution, to getting restaurants to pay in a timely fashion
- Labor
- Lack of workforce
- Virginia is a poor place for supporting commercial honey production
- Homeowners association/neighbors
- Insufficient Demand

Are you interested in expanding your operation within the next three years?



Answer Options	Response Percent	Response Count
Yes	57.9%	77
No	42.1%	56
<i>answered question</i>		133
<i>skipped question</i>		15

What is your level of interest in the following potential regional infrastructure opportunities?

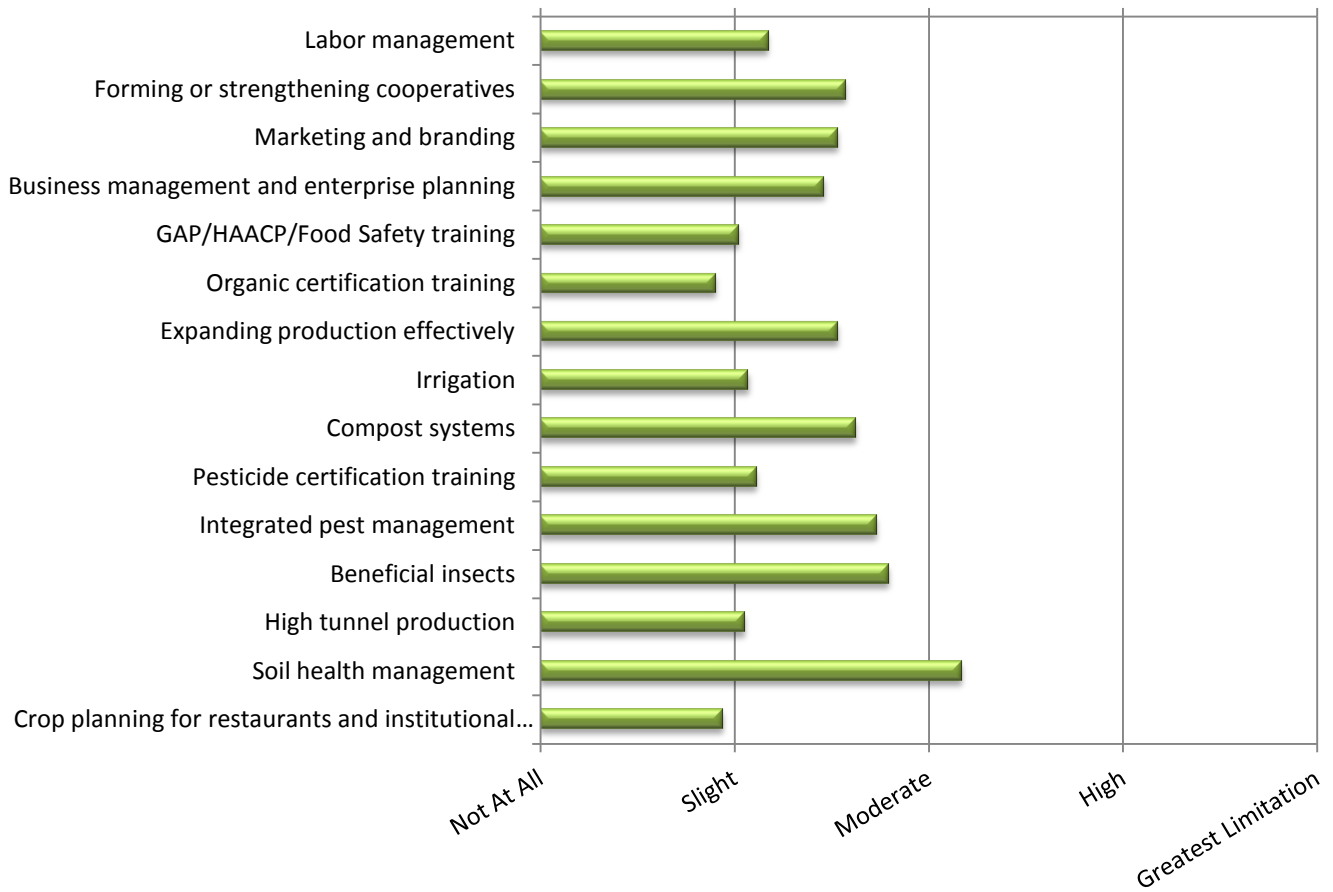


Answer Options	No Interest	Slight	Moderate	High	Very High	Rating Average	Response Count
Aggregation and distribution center	46	19	38	19	7	1.40	129
Community kitchen for value-added processing	65	21	25	7	11	1.05	129
Commercial produce processing facility	77	17	13	9	12	0.92	128
Meat processing facility	49	16	21	23	19	1.59	128
Dairy processing facility	90	13	11	9	4	0.61	127
Refrigeration facility	69	17	24	13	5	0.97	128
Mobile processing for meat	72	17	13	13	13	1.05	128
Mobile flash freezing unit for produce	82	19	11	11	4	0.71	127
Regional labor pool	60	16	27	16	10	1.22	129
Other (please specify)							8
<i>answered question</i>							129
<i>skipped question</i>							19

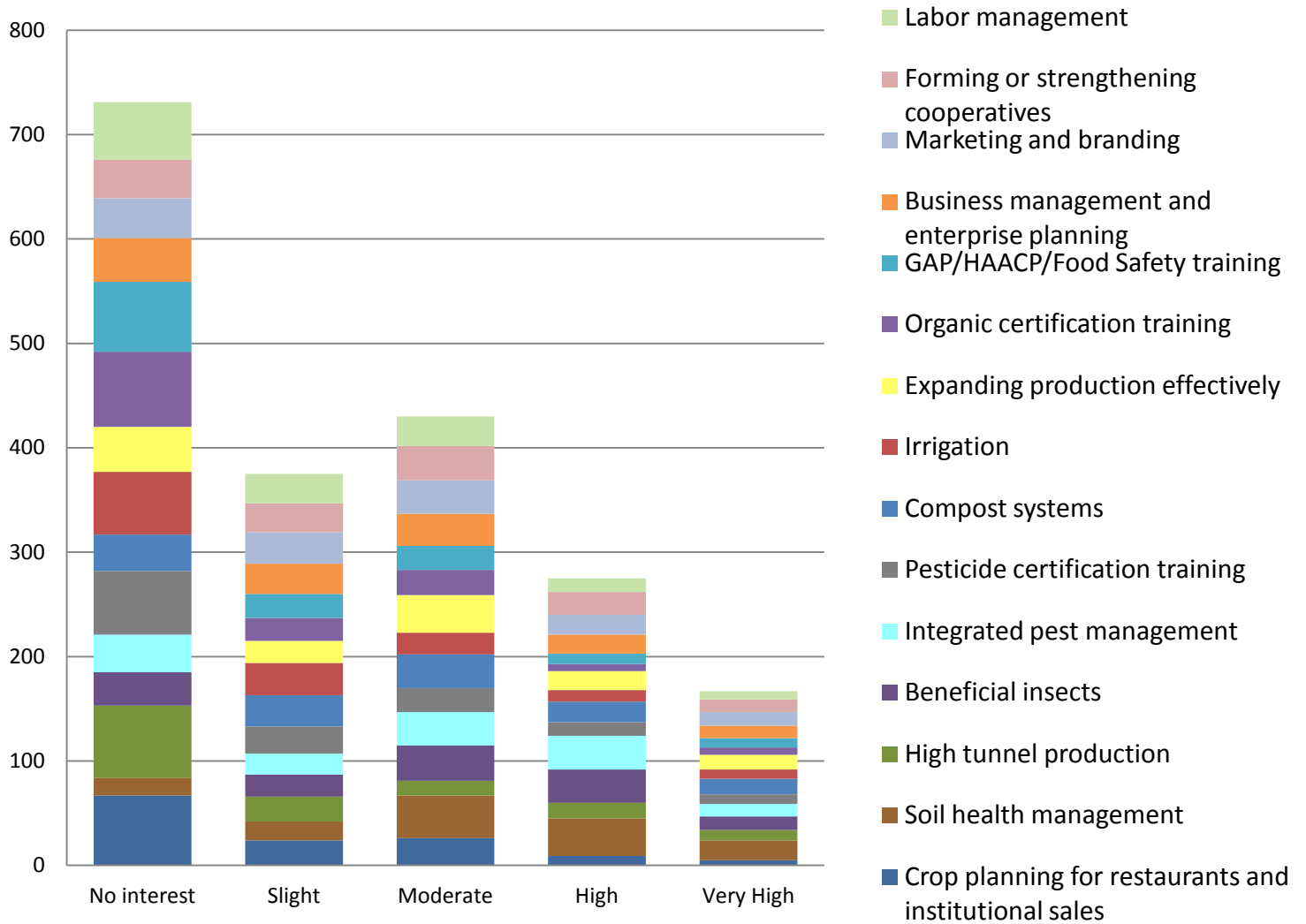
Other (Infrastructure Needs)

- Even though we are not interested in many of these items for our business, I know this would benefit others!
- Freight/ transportation pool at reasonable prices
- Events/weddings, cooking/baking classes
- A refrigerated delivery truck (they are very expensive)
- Central authority for grape sales...a business oriented person.
- Live cattle, on farm support for producers
- More land w/o other farmers using petro-chemicals

What is your level of interest in the following training and education opportunities?



What is your level of interest in the following training and education opportunities? (Continued)



Answer Options	No interest	Slight	Moderate	High	Very High	Rating Average	Response Count
Crop planning for restaurants and institutional sales	67	24	26	9	5	0.94	131
Soil health management	17	18	41	36	19	2.17	131
High tunnel production	69	24	14	15	10	1.04	132
Beneficial insects	32	21	34	32	13	1.80	132
Integrated pest management	36	20	32	32	12	1.73	132
Pesticide certification training	61	26	23	13	9	1.11	132
Compost systems	35	30	32	20	15	1.62	132
Irrigation	60	31	21	11	9	1.08	132
Expanding production effectively	43	21	36	18	14	1.54	132
Organic certification training	72	22	24	7	7	0.90	132
GAP/HAACP/Food Safety training	67	23	23	10	9	1.02	132
Business management and enterprise planning	42	29	31	18	12	1.46	132
Marketing and branding	38	30	32	19	13	1.54	132
Forming or strengthening cooperatives	37	28	33	22	12	1.58	132
Labor management	55	28	28	13	8	1.17	132
Other (please specify)							7
<i>answered question</i>							132
<i>skipped question</i>							16

Other (Educational/Training Needs)

- None; if you farmed for 60 years you learned all this
- Farmland preservation
- Non-herbicide weed control; non-fertilizer pasture improvement; ways to use surface water and still exclude livestock from streams
- Mentoring for grant writing. Collective buying of compostable shopping bags (so we get a bulk discount)
- Marketing benefits of natural fiber clothing to individuals and organizations including DOD military applications.
- How to deal with government bureaucracy

What resources if provided would help you sell more food locally?

- We are at capacity.
- Access to ethnic markets/ marketing for goats
- Labor
- Local slaughter facility
- A permanent year-round farmers market facility
- Marketing product locally, incentive to buy local
- Cooperatives using CSA methods to provide distant customers with a variety. We have problems delivering to long-distant CSA customers when working outside the home and running the farm.
- More famers market
- Meat processing facility
- More regional promotion of Rappahannock-Rapidan food stuffs in the DC market area
- Finding demand
- More customers buying locally
- Development of slaughtering facilities for sale of locally produced large and small animals and poultry
- As a small farmer, the profit margins are not in place to sell wholesale. So I can stay small, not hire help and keep profits; or get bigger, hire help, sell wholesale and make less profit.
- Marketing plan and branding of farm
- Advertisements
- Money
- I don't sell food locally.
- Product distribution from farm to endpoint - very time consuming and takes away from more important aspects
- Advertisement
- Satisfied with present methods
- Free advertising/signage for highways
- Infrastructure grants for individual farms
- Education
- Consumer education is needed as much if not more than producer education
- Marketing and processing and distribution are activities that would need to be in place. Those are not activities I would want to add to raising livestock
- USDA meat inspection slaughter house
- Meat processing facility

- Meat processing facility
- As listed above
- Mobile meat processing and refrigeration facility
- Reasonably-priced USDA-certified lamb slaughter and processing
- Identify potential customers
- Dairy facility/creamery
- Better marketing
- We're not yet at the point where we harvest food (truffle) but when we are we will want to be able to establish effective relationships directly with chefs (our chief customer for the end product). Guidance on how to do this would be helpful.
- Federal inspected meat processing
- Cooperative retail food store
- I need a refrigerated small truck or van to deliver cut flowers to florists 50-75 miles distant
- Meat processing
- Incentives to put more land into sustainable and productive agricultural production, most everything we sell is in part consumed in this region, just need more people, more operations to be productive and economically and environmentally responsible
- Rentable commercial kitchen for added value!
- PEC public support to restaurants that REALLY buy local
- Centralized local directory of growers. Restaurants posting wish lists.
- Meat processing facilities that can be trusted not to pilfer
- Our main problem is that our expenses are too high.
- Better meat processing facilities for goat meat
- We already have more demand than product
- Patron/funding to develop an agri-center - off grid
- Education of consumer to pay a fair price for healthy food
- Broker/connection between producer and consumer
- More connectivity to knitters groups and specialized knit shops
- USDA inspected poultry and livestock abattoirs - not relying on PPIA exemptions for poultry.
- Lobbyists to stop corporate owned farm markets
- Shared labor/shared small scale sales outlet/ distribution system
- Consumers talk the talk but very limited number follow through. We find restaurants routinely by small quantities in order to use our name on menus then substitute commodity products for bulk of demand
- Labor, sales channels, distribution mechanisms

- Ability to sell wine at farmers' markets
- More and better land and bee forage crops
- More awareness toward public of the quality of Virginia wine
- Advertising
- Local aggregation with pick up services for D.C./Charlottesville/northern neck

Please list any additional comments or concerns you may have regarding your farming operation, or this regional effort to foster agriculture and consumption of locally produced farm products.

- I would like to see you continue to introduce the public to local farms and farming - that has been very helpful to our operations over the years.
- Not many people want to buy local
- We are spending more time and money resulting from government regs than we are farming
- Waste management and recycling
- I think the Charlottesville Food Hub is a great model. I'd love to see something like this closer if there was the demand.
- I worry about the [Culpeper] County's tendency to urbanize, reducing the need for agricultural infrastructure and reducing land affordability and availability - on top of urban people not supporting agricultural enterprise.
- More educational opportunities locally [Rappahannock County]
- Try to have classes and workshops in the evenings or on Fridays or Saturdays during the winter months to better serve producers that have employment outside the home.
- It would help most if fencing money was available.
- I would be interested in selling beef locally but finding paying customers is the drawback.
- If there were a cost-effective way to market fluid milk locally we would be interested.
- Any information to help support the sales of live stock. I would like to see local and to restaurants.
- Will be out of business in two
- This survey seems more likely to appeal to the city farmer than to the regular farmer.
- Too much spending by County Supervisors for website [illegible] which do not benefit taxpayers
- Be careful what you wish for. It might bite you.
- I would like to obtain further opportunities for the 21 acres (ie other ideas).
- I run a family farm, not a big production farm, and not interested in changing
- Need realistic farm assessment and taxation, both real estate and personal property
- Future after I'm gone - I'm 89. May retire one of these years.
- What is local? Have been to farmers market in Culpeper where people are selling food that they did not produce, but bought wholesale somewhere to resell. That is damaging to local producers.
- Corn producers utilize most of the farmland near me, and I raise cattle and produce hay. I need to lease another 200-250 acres of farmland for my operation.
- The survey did not address forestry products. Many landowners have a mixture of woodland and open land.
- Local USDA meat inspection needed

- Health concerns to public - liability to farmer
- Strong support of this effort
- The bottle-neck for this whole thing is the cost and logistics of processing (meats)
- Local farmer's market participation is intentionally limited to keep prices high.
- I think we don't understand multi-year, multi-crop systems. It's very difficult to plan for. We also could probably use regional planning versus individual farm planning.
- More critical and truthful review of certified raw milk programs from other states (i.e. Calif. - Penn. Etc) by Va. Legislature
- The local and state gov't needs to be more farm-friendly. We should be able to sell our own products without hassle.
- We are trying to establish a specialty crop. When we actually have harvest (probably within the next winter season or 2) I believe we will garner more interest from the ag people as well as potential growers. Harvest will benefit the ability of chefs to get local, truly fresh truffle. Success for us can lead to interest from potential growers to keep land in use with a potential high upside. Research and ag agent support for this specialty crop would go a long way to helping. Even interest at this point would be a start.
- Madison is primarily an agricultural county without the local customer base to fully support small local farmers; need to attract those outside the county and/or have a cooperative effort to pool products to sell elsewhere. Also, lack of affordable consistent labor limits growth opportunities.
- I would like to try growing vegetables for Farmers' Market and direct sales to Supermarkets but lack know how
- The diversity of farming systems makes it difficult to do any one thing that would benefit all producers, many of the efforts like farm to table and organic and natural value added marketing in this region focus much of their resources on the marginally productive farmers / lifestyle farmers that don't offer an equal return to the local economy or make efficient use of the resources allocated to them. In other words, take measures to improve agriculture in this region that invest in things that can be shown to provide reasonable economic benefit.
- Increased regulation which hurts small supplemental income farmer.
- Some sort of community mentoring program could be very cool for helping new farmers, I had so many questions for the first couple of years, about how to run a business, where to buy things, etc, some sort of mentoring community would be awesome.
- There are mixed messages from different sources about cooperative programs offered which dilutes opportunities to take advantage resources for getting started or sustaining organic ag practices
- I am interested in returning to farming. Currently on farm as tenant but learning that soil/pasture will take years to recover with substantial inputs. Looking for better farmland to lease.
- Municipal employees and non farming residents need education regarding agriculture; the animal rights and anti-farming propaganda is negatively impacting farmers. We're labeled animal abusers or destroyers of the earth and it's simply not true. Part of any local food system effort should have an educational component for non farmers - and that information should come from agribusiness - not animal rights or environmental groups. I have no interest in organic certification and yet my farm is a model of good natural resource management and animal welfare. Organic is not the only way to farm.

- "know your farmer" is limiting due to the inefficiency it imposes. "Know your farm cooperative" is a way we might have a chance at providing local food at an efficient and measureable scale.
- Thanks for your support. Let me know if I can be of help.
- State must choose and promote /support which are the best crops to promote as the "signature" for VA
- Need stronger right to farm laws
- The current supply exceeds the demand for buy fresh/buy local.