

The Farm to Market Handbook

Quick Tip Guides For Accessing Five Major Marketing Channels





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The Community Alliance with Family Farmers (CAFF) is a non-profit organization that advocates for California family farmers and sustainable agriculture through practical, on-the-ground programs. CAFF builds partnerships between family farmers and their communities to create local economic vitality, improved human and environmental health, and long-term sustainability of family farms.

This Farm to Market Handbook is designed to help farmers access markets. It provides information, selling tips and internet links to top informational sites for five major marketing channels. Information on additional marketing channels not included can be found in our 2013 guide referenced above.



Preface

The Community Alliance with Family Farmers (CAFF) is a non-profit organization that advocates for California family farmers and sustainable agriculture through practical, on-the-ground programs. CAFF builds partnerships between family farmers and their communities to create local economic vitality, improved human and environmental health, and long-term sustainability of family farms.

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Farmers Markets

Farmers' markets are temporary retail establishments where farmers can sell their products. They are typically held outside and can be seasonal or year-round. They can be a good entry-level sales channel, especially for beginning farmers. There are over 8,500 farmers' markets in the U.S. and popularity remains strong.

For This Market You Can Expect

- Lower volume of product
- High price per unit
- High investment of time

Price Setting

The easiest way to determine a price point for your product at farmers' market is to check the prices at a local natural food store (not a big grocery chain). If you are limited on time, scanning the Whole Foods website and setting it to your farmers' market location might also be a good option. We also recommend seeing what other farmer's market vendors at the same market location are charging. Different market locations can fetch different prices. Lastly, consider your production costs, supply and demand, and the season. Often low supply and early/late season availability will fetch premium prices.

Questions When Selecting a Market:

Which markets would you like to attend?

Does the market already have vendors with the same products that you grow?

Do you feel like you can provide products that differ from other growers?

Will you still be able to make a profit given the distance you must travel, labor, and market fees?

How much time can you afford to be away from the farm?

Who will sell your products if you cannot be at the market and at what cost?

Are you committed to being a regular vendor at farmers' markets given that markets tend to require consistent participation and that a repeat customer base takes time to build?

How can I be successful at the farmer's market?

Understand the social aspect of this sales channel.

Understand the importance of knowing and following farmers' market's rules and regulations.

Have the ability to accept the authority of the market manager/ market board of directors.

Understand that while a farm operation is an individual business, in a farmers' market, each farmer is part of a cooperative store and you have to abide by decisions made for the whole market, not just for the individual farmer.

Have competency in post-harvest handling–this includes knowing when to harvest and still get the product to market while it's looking its best.

Food Safety and Regulation Guidance

Food safety: See general food safety information in the food safety section at the end of this guide.

Labeling requirements: exempt from the standard pack and some labeling requirements. See Community Alliance with Family Farmers Direct Marketing in CA Rules And Regulation Guide for guidance caff.org/directmarketingincalifornia

UCCE rules/regulations guidance: ucanr.edu/sites/CESonomaAgOmbuds/Produc e_Farming/

Liability insurance: Product liability insurance is an important consideration, and in some cases, is required. It's designed to protect you if someone becomes sick from your product. The amount of insurance you need depends on the products you are selling and your end market. Farmers should speak to other farmers and an insurance agent.





Additional Resources

The Farmers Market Coalition Resource Library farmersmarketcoalition.org/education/resource-library/

How to set up a good farmers market display video: youtube.com/watch?v=u1v9EluncKo

Find a market with CDFA's Certified Farmers' Markets by County Document cdfa.ca.gov/is/docs/CurrentMrktsCounty.pdf

National Center for Appropriate Technology (NCAT) ATTRA resources attra.ncat.org

Farmers' market marketing tips: attra.ncat.org/product/ncat-marketing-tip-sheet-series/

Farms Reach for determining profit margins and costs:

blog.farmsreach.com/marketing-sales-series-pt-2-pricing-your-products-tracking-sales/#more-6450



Community Supported Agriculture (CSA)

CSA is a system of direct marketing where consumers commit to a farmer at the beginning of the growing season for a weekly box of fresh fruits and vegetables. Farmers use up-front payments to cover the cost of seeds, tools, and other inputs at the start of the season. By paying at the beginning of the season, CSA members share in the risk of production and decrease the time needed for marketing. This means that even if there is an unsuccessful harvest, the members still pay the same amount for the season ensuring that "their" farm survives over time. While many traditional, full-season CSAs exist, many have transitioned to customer-centered models like customizable boxes, free choice options, or even week-to-week commitments. Regardless, a CSA farm has the opportunity to cultivate a very loyal customer base.

For This Market You Can Expect

- Lower, top-quality volumes
- High variety (40+ items)
- Higher prices per unit.
- · High investment of time

Price Setting

In a CSA, the crops are sold at retail prices (*Please see Farmers' Market section for more information*). Calculate the cost per share by estimating the market price of the included product for an average share multiplied by the number of weeks in a share. Payment methods vary greatly: set fee, sliding scale, pre-paid free-choice cards, and even SNAP payments. Be sure to add in delivery fees if you are offering delivery.

Key Questions to Ask Yourself About CSAs

Timing and planning are critical in a CSA. Do I have the skillset to ensure consistent, weekly harvests of a large variety of top-quality products for my CSA customers? See ATTRA's "Scheduling Vegetable Plantings for a Continuous Harvest" or CSA Innovation Network's videos/ resources.

How many CSA farms are in my area? Do they have waiting lists/unmet demand that I could tap into?

Are there other farms interested in starting a multi-farm CSA to increase the diversity of offerings?

Will I enjoy the social/customer service aspects of running a CSA, such as weekly communications, hosting gatherings or workdays for members, writing newsletters, or compiling recipes?

Do I have excellent organizational skills and systems or do I have the funds to invest in e-commerce software?

How Can I be Successful at a CSA?

Build community through efforts such as harvest parties, workdays, and newsletters.

Conduct annual surveys to get customer feedback on quality, variety, and service.

Consider collaborating with other CSA farms if you want to offer a wider selection

Include fun events such as a field day where you can open up your farm to a diverse group of people. Understand that much of CSA is about customer service which takes time. Educating members about seasonality, recipes, and farming are all part of the experience and relationship maintenance.

Attracting new customers AND retaining existing ones is paramount.

Food Safety and Regulation Guidance

Food safety fact sheets have been provided for your reference, please see (add link)

Community Alliance with Family Farmers Direct Marketing Rules And Regulation Guide

Labeling requirements: exempt from standard pack and some labeling requirements. See CAFF's Direct Marketing Rules And Regulation Guide found here

Liability insurance: Product liability insurance is an important consideration, and in some cases, is required. It is designed to protect you if someone becomes sick from your product. The amount of insurance you need depends on the products you are selling and your end market. Farmers should speak to an insurance agent.

Additional Resources

CSA Innovation Network Resources https://www.csainnovationnetwork.org/

CSA Starts Here: An educational video series for aspiring and beginning CSA Farmers https://www.csainnovationnetwork.org/csa-starts-here

Farmer to Farmer Ecommerce Platform Comparison Report https://www.csainnovationnetwork.org/ecommerce-report

My Digital Farmer: Online marketing strategies to help CSAs grow their business. https://mydigitalfarmer.com/

CSA focused Facebook: CSA Marketing Discussion Group and CSA Farmer Discussion Group

CAFF's Farm Hub Tech hub: https://caff.org/small-farm-tech-hub/: tech and e-commerce support

National Center for Appropriate Technology (NCAT) ATTRA www.attra.ncat.org.

CSA Marketing Tip Sheet: https://attra.ncat.org/product/ncat-marketing-tip-sheet-series/

Farms Reach: Tools to determine if profiting on transactions, covering costs, making a profit. http://blog.farmsreach.com/marketing-sales-series-pt-2-pricing-your-products-tracking-sales/#more-6450



Direct to Retail

Grocery stores, especially natural foods stores, typically buy large volumes of fresh produce and prefer to support local farms. Very large grocery chains (e.g. Safeway, Kroger, SaveMart) are more difficult to sell into, especially for small and midsize farmers. An emerging market that also tends to purchase from local, small and midsize farmers are online grocers, businesses-like Good Eggs, inc., and Imperfect Foods. Similarly, restaurants are another attractive direct-to-retail opportunity that fetches higher prices, requires less volume, and helps to diversify one's sales channels. Depending on location, restaurants can be supportive or difficult to access. Some challenges include: securing a meeting, chef turnover, and budgetary constraints; however, once secured this is an excellent opportunity for a deep buying relationship.

For This Market You Can Expect

- · Low to medium volume
- Low to high price per unit (grocery lower; restaurant medium to high)
- Medium investment of time

Price Setting

One way to set prices for a retail buyer is to check websites or sign up to receive availability sheets from local distributors, food hubs,

brokers, etc. that have similar product and mirror price points. This is attractive to retailer buyers because it is very likely they are purchasing from those businesses already, therefore by providing a similar price point you are providing a good alternative that can switch to without compromising their yields. Restaurants tend to pay slightly lower than farmers' market prices. See resource section below for helpful pricing tools. Consider your production costs, delivery fees, seasonality, and type of establishment too.

Packaging and labeling:

Packaging products is an important part of selling direct. If in doubt, ask the store about their expectations and requirements.

Do they want the items in small containers or bulk?

Does the product need to be delivered in a standard pack, by weight, etc.? Size, color, maturity and shape should be as uniform as possible within a package.

Are new boxes required for delivery? Consider reviewing the Wholesale Packing Resource Guide for further information.

Labeling packages help to keep track of the produce as it moves through the system, from farm to wholesaler or retailer.

At a minimum, labels must contain the following information under FDA regulations: Common name of the product, net weight, count and/or volume, name, and address of producer, packer, or distributor, country, or region of origin.

Other considerations:

Many stores will require that you carry product liability insurance. Be sure to add this to your costs.

Some products such as meat and organic produce require certification, approval or registration. These certifications should also be taken into consideration as an expense.

Some very large stores may require a Dun and Bradstreet number (DUNS Number) to approve you as a business. This number is a way of tracking and monitoring companies and can be expensive, so find out if this is required before applying for one.

Generally, the smaller the grocer, the lower the required volume. Find an appropriate match with whom you can build a relationship.

Smaller stores and chains generally have an in-house buyer who coordinates aggregation, while larger chains have major central warehouses. Start small to get to know this marketing channel before expanding to larger, more complex accounts.

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Direct Marketing Rules And Regulation
Guide

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National Center for Appropriate Technology (NCAT) ATTRA resources attra.ncat.org

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Direct to Schools

Many communities nationwide are now adopting Farm to School programs. They see the educational and nutritional values of providing fresh and local food for students and economic benefits to supporting local farms. This gives farmers the opportunity to contribute to a positive movement by selling directly to schools, while simultaneously expanding their market and revenue streams. School customers tend to pay slightly more than large-scale wholesale for slightly lower volumes while providing more consistent purchasing relationships than chefs at restaurants, making them a more accessible wholesale market channel for small farmers.

For This Market You Can Expect

- Low to high volumes depending on the size of the school
- · Low to medium price per unit
- · Medium investment of time

Price Setting

The most helpful process for setting pricing is to stay in communication with the food service department. School districts tend to provide farmers with higher prices than wholesale and lower prices than CSAs and Farmers Markets,

but the advantage is that school districts tend to buy higher volumes. Ask the food service department what they are currently paying for the product through their distributor and provide them with a sample to show the quality of your product. School districts may be willing to negotiate prices for micro-purchases based on quality, volume, delivery time, educational opportunities, and promotions. School district buyers have varying budgets, local goals, delivery locations, and processing capabilities keep this in mind when communicating with the school district nutrition services department.

Contact your local School District Food Service Director

School District Child Nutrition Directors' contact info are provided publicly on school district websites. Like other customers, all school districts are different sizes and have different needs. Most are centrally managed by a head Director and some also have purchasing or "procurement" managers. Reach out to your School District Child Nutrition Director/ main office for advice regarding the following:

Whether they have interest and budget (such as from grants) to purchase from local farmers.

Specifically what farm products the schools are looking to purchase.

Local partners may be able to refer you to interested school districts. Go to farmtoschool.org/our-network to find partners near you who can help.

If the district has the ability to process what you're growing or whether they need it pre-processed.

Delivery specifications - what days do they accept deliveries and to how many sites? Payment terms.

Any documents the school district may need to register a farm as a vendor, such as a W-9.

Neither the State nor Federal Governments require that School Districts only purchase from farms with 3rd party food safety certification. All school districts are different - some school districts require this certification from all farms that they purchase from, while others do not require it at all or when buying directly from small farms or food hubs.

Be prepared to have this conversation with the school food buyer or aggregator that you're working with.

Choosing Products Popular with Children

New Farm to School programs will likely start with whole fruits that you can eat with your hands without chopping ("hand fruits"), such as apples and oranges, depending on the season.

More mature programs may be interested in vegetables and herbs, such as broccoli, carrots, and parsley, as they first require preparation and proper facilities to be in place.

Calendar Considerations

Typically, school district child nutrition programs operate from August-June, with very little purchasing happening over the summer, during the first and last month of the school year, and during holiday breaks.

Some school districts run summer meal programs and plan for Farm to Summer events and local purchasing. When contacting a school food service department ask them if they intend to make any local purchases over the summer.



The Business Side

There are typically no long-term contracts between individual farmers and schools.

The dealings are often between the farmers and the Food Service Director in small- to mid-sized districts, especially in rural areas.

The dealings are usually between farmers and aggregators, such as food hubs or distributors, in large districts. Some large districts purchase directly from farmers.

Most districts have flexibility in purchasing outside of their contracted vendors and many purchase 5%-10% or more directly from farms and food hubs.

Depending on the total amount and time frame of a school district's purchase, they have to follow different rules and regulations. In most cases, if each sale is under \$50,000, the district does not need to compare multiple quotes or create a contract.

Common relationships between farmers and schools begin with the farm selling surplus produce for a school promotional event as a creative short-term solution that may lead to seasonal dealings.

Payment terms through school districts can vary. Ask them when vendors usually receive payment.

Farmers may not receive payment until a few weeks after delivery.

The school district will require a W-9 form to register the farm as a vendor before purchasing. Contact the food service department for more information on what documents they need and if they have a vendor registration process.

You may elect to become more involved with the programs

Farm visits can be a great learning experience for students. If you are interested in bringing students to your farm for a field trip, reach out to the food service department and see if they can connect you with teachers or garden educators that would be interested in organizing a student field trip to your farm.

If the school district hosts Career Day events, contact the school district and see if you could be a part of the event and present to the students on your experiences as a farmer.

If any of the district school sites have a garden, consider offering consultation or making a small donation of seeds or plants.

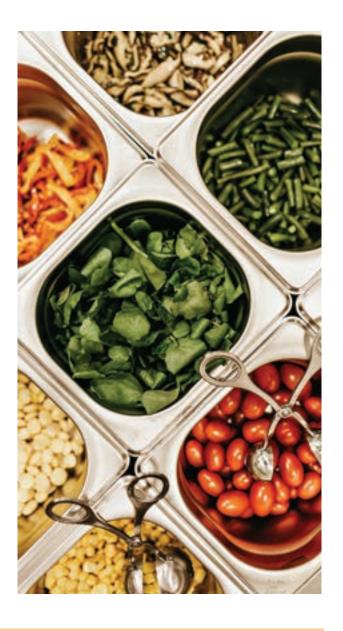


Food Safety and Regulation Guidance

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Labeling packages help to keep track of the produce as it moves through the system, from farm to wholesaler or retailer. At a minimum, labels <u>must</u> contain the following information under FDA regulations:

Common name of the product, net weight, count and/or volume, name, and address of the producer, packer, or distributor, country, or region of origin.



Additional Resources

Bringing the Farm to School: Agricultural Producers' Toolkit www.farmtoschool.org/our-work/bringing-the-farm-to-school-producer-resources

USDA Fact Sheet - School Purchasing Decision Tree:

fns-prod.azureedge.net/sites/default/files/resource-files/USDA_OCFS_FactSheet_DecisionTree_english_10_3_v3.pdf

National Farm to School Network: www.farmtoschool.org/resources

Virginia Cooperative Extension:

https://www.pubs.ext.vt.edu/content/dam/pubs_ext_vt_edu/AEE/AEE-77/ALCE-181.pdf

Tips for Selling to Schools attra.ncat.org/product/ncat-marketing-tip-sheet-series/

<u>Useful tools for farmers to determine if profiting on transactions, covering costs, making a profit.</u>

http://blog.farmsreach.com/marketing-sales-series-pt-2-pricing-your-products-tracking-sales/#more-6450



Direct to Wholesale

There are different types of wholesale channels: aggregators/grower-marketing cooperatives, produce brokers, produce distributors, produce packing houses, wholesale buyers at terminal markets, and food access programs.

At the time of the publishing of this handbook, buyer demand for product from small local farms, especially those that are BIPOC, or women-owned, is rapidly growing in California. Direct wholesale customers vary widely in needs and expectations but finding the right fit can help farmers build their businesses.

For This Market You Can Expect

- High volumes
- Lower prices
- Low time commitment

Price Setting

Selling wholesale might be the most challenging market channel when determining the price because the price may be subject to hidden fees and costs. We suggest that farmers have a clear conversation with their wholesale buyers to get an understanding of how they determine the price. Additionally, there are many price-setting websites. We suggest Produce Pay (producepay.com).

Websites usually have a fee but it is an easy way for a farmer to get real-time pricing information. A free resource available is also the USDA Terminal Markets, for more information please see Additional Resources at the end of the section.

Considerations

You can sell a larger quantity, but expect a lower price per unit.

Wholesale buyers typically pay within 30 days, you must determine how that will affect your cash flow.

Farmers can set prices, but the buyer must agree to it. Farmers must have a good idea of what the going prices are in the wholesale market.

Farmers must meet packing and grading standards.

Consider your wholesale buyer's post-harvest requirements and whether the product must be delivered in a refrigerated truck.

Selling to a wholesale buyer requires a well-organized invoicing and recordkeeping system.

Wholesale buyers have varying food safety requirements for farmers to make sure that they meet.

Key Questions to Ask Yourself

How far away is the nearest wholesale market?

Do I want to put the effort into establishing relationships with buyers? Would I rather go through a broker?

How do buyers want produce packed and delivered?

How much volume is needed to supply wholesale buyers?

Tips for Selling to Wholesale Buyers

Identify and contact wholesale buyers before you try to sell to them.

Wholesalers may offer higher prices to farmers if they have an established relationship, if the farm has high-quality produce, and/or if the farm is selling unique or specialty products that are in high demand.

At Terminal Markets, visit the wholesale market to get a better understanding of how the wholesale market works and to learn about other farms that sell to the wholesale market. Talk to the wholesale buyer and show them your produce. The same goes for individual wholesale customers.

If you're planning on making a wholesale market or customer one of your regular sales channels, prioritize delivering the wholesale buyer your products on a consistent schedule. Consistency and quality are keys to success in the wholesale market.

Check the USDA Terminal Market Reports: https://www.ams.usda.gov/market-news/fruit-and -vegetable-terminal-markets-standard-reports and simple custom report tool https://www.marketnews.usda.gov/mnp/fv-home

Questions for Buyers

What is your onboarding process?

How many small farms do you currently source from?

What's your farmer contracting process?

What is your purchasing process and frequency? How often do you need an availability sheet?

Do you require any certifications?

Do you require a particular packaging style?

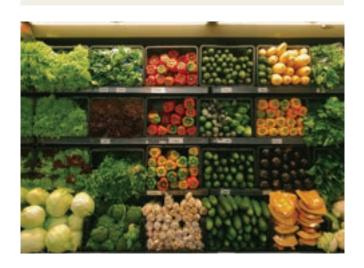
What are the costs associated with selling to you? Ie. do I need to use/purchase your boxes, labels, barcodes, etc? Can I use my own label?

What is your turnaround time for payment?

What is your preferred method of communication?

When do you order and need confirmation and delivery?

What should I be conscious of when selling to you?

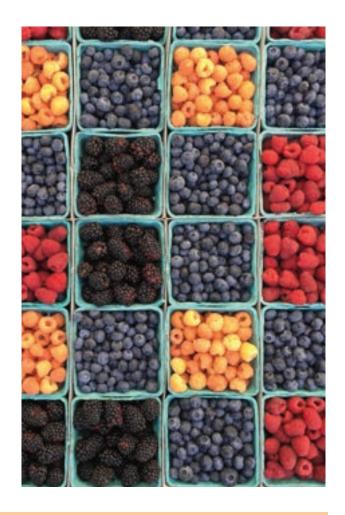


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UCCE rules/regulations guidance: https://ucanr.edu/sites/CESonomaAgOmbuds/Pro duce_Farming/



Additional Resources

<u>SARE Wholesale Packing Resource Guide:</u> https://www.sare.org/wp-content/uploads/Wholesale-Packing-Resource-Guide.pdf

The SF Terminal Market: https://thesfmarket.org/visit

Sustainable Agriculture Research & Education Program (SAREP): https://sarep.ucdavis.edu/

<u>A Guide to Selling Your Farm Produce Wholesale:</u> https://www.food4all.com/a-guide-to-sell-ing-your-farm-produce-wholesale/

National Center for Appropriate Technology (NCAT) ATTRA Marketing Tip Sheet: Tips for Selling to Wholesale https://attra.ncat.org/product/ncat-marketing-tip-sheet-series/

<u>USDA Agricultural Marketing Service price index:</u> https://www.marketnews.usda.gov/mnp/fv-nav-by-Com?navClass=VEGETABLES&navType=byComm

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Produce Pay: producepay.com: https://insights.producepay.com/auth/register?ref=website user friendly pricing website.



Food Safety

Food safety is an important topic for all marketing channels. According to the USDA Food Safety and Inspection Service (US FSIS), food safety is defined as "A suitable product which when consumed orally either by a human or an animal does not cause health risk to consumers." There are three types of health risks that can be caused by food:

- 1. Chemical improperly stored, handled or used chemicals can be a source of contamination. Examples: fertilizers, pesticides, cleaning agents, fuel, etc.
- 2. Physical anything that is not meant to be in the produce. Examples: screws, glass, staples, wood, insects, etc.
- 3. Biological (Microbial) viruses, bacteria, parasites, or fungi, that cause illnesses and sometimes even death. (Bacteria that are disease-causing are referred to as pathogens. Illnesses caused by eating contaminated foods are referred to as foodborne illnesses or food poisoning).

It is important to understand all three sources of potential contamination, but biological contamination is the biggest concern. This is in part because the human sensory system cannot see, taste, smell, or feel pathogens or viruses, whereas we can often detect chemical contamination through smell or taste and physical contamination through touch or feel. Biological contamination is also a main concern because of the serious health implications of these pathogens.

Good Agricultural Practices (GAPs)

There is no such thing as "zero-risk," when it comes to food safety, but practices and steps need to be in place on farms to minimize any potential risk of contamination. Food safety risks may be reduced on the farm by following good agricultural practices (GAPs). GAPs help growers understand the practices and risks associated with their farm, and help identify practical ways to reduce the risk of contaminating produce being grown, harvested, and packed on the farm. Implementing GAPs helps decrease the likelihood of a food safety outbreak. Although the common principles of GAPs don't change from farm to farm, each GAP is unique, as every grower does things differently. GAPs focus on assessing the risk in the following five key areas:

- 1. Water
- 2. Manure/Compost & Soil Amendments
- 3. Land Use (Previous/Adjacent) & Animal Access (Domestic/Wildlife)
- 4. Equipment, Tools & Buildings
- 5. Employee Health & Hygiene

Assessing the risks and implementing steps to reduce the chance of contamination in each of the above five areas and ensuring proper traceability is what makes GAPs successful on farms.

Food Safety Modernization Act (FSMA)

In 2011 Congress passed and President Obama signed into law the Food Safety Modernization Act (FSMA). It was the first time we had a major food safety overhaul across all sections of the food system for 70 years. Now, with FSMA in place, the federal government is regulating on-farm food safety at produce farms. Annual farm sales and a farm's marketing channels determine if a farmer is exempt, partially exempt, or fully covered by FSMA. All farms need to understand their status under FSMA and the law's food safety requirements for their farm. See the Resource section below for more information and help.

Third-Party Audits

Third-Party Food Safety Audits are not required by FSMA or most smaller marketing channels but can expand market opportunities for farmers, larger buyers, such as grocery stores, institutions, and wholesale distributors often require farmers to pass a 3rd party food safety audit, which verifies their on-farm food safety practices. There are a number of third-party auditing firms, each with a slightly different program. You can request an audit from the California Department of Food and Agriculture's Food Safety Audit Program or from a variety of private companies that offer audits (e.g. Primus, GlobalG.A.P., etc).

Costs vary significantly depending on your location and the company you decide to use. (Note: Always ask if your buyer requires a certain company or program for verification). Third-Party Food safety Audits require preparation and planning, so a farmer must familiarize themselves with the audit requirements and implement the required food safety practices in advance of an audit.

The following are links to some of the auditing and/or their specific programs:

Harmonized GAP:

https://www.ams.usda.gov/services/auditing/gap-ghp/harmonized

Primus Auditing Ops:

https://primusauditingops.com/index.php/scheme-menu-primusgap

Global G.A.P. local GAP Audit:

https://www.globalgap.org/uk_en/what-we-do/globalg.a.p.-certification/localg.a.p./

LGMA:

https://lgma.ca.gov/



Additional Resources

Community Alliance with Family Farmers (CAFF): https://caff.org/food-safety/ contains extensive tools, templates, podcasts, and technical assistance ranging. Jump straight to helpful templates here https://caff.org/food-safety/food-safety-plan-templates/ If just getting started, the farm risk assessment and food safety plan templates are recommended.

UC Small Farm Food Safety resources for small farms in English, Spanish, Mandarin, Hmong, and lu Mien: https://ucsmallfarmfoodsafety.ucdavis.edu/

Third-Party Food Safety Audit Guide from Carolina Farm Stewardship Association:

https://www.carolinafarmstewards.org/gaps-manual/

NSAC's Food Safety Modernization Act Flow Chart:

https://sustainableagriculture.net/blog/updated-fsma-flowchart-2018/