

# Local Food Marketing – 2025

## (Local Food Marketing Practices Survey)



United States Department of Agriculture  
National Agricultural Statistics Service



# Survey Overview

- The purpose of this survey is to provide:
  - Valuable information on the details of local food sales, expenses, and other information.
  - Complete representation of the farm economics of local food production.
  - Insight on trends in local food sales in the agricultural economy.
  - Policymakers with necessary knowledge when considering policy and programs in support of the local food industry.

# General Survey Information

- Project Code: **683-Local Food Marketing**
- Questionnaires:
  - Initial Mailing January 6<sup>th</sup>
  - 2<sup>nd</sup> Mailing March 3<sup>rd</sup>
- Calling:
  - April 2<sup>nd</sup> – 30<sup>th</sup>
- Release:
  - *Local Foods; December 15, 2026*

# Cover letter mailed with questionnaire



United States Department of Agriculture  
National Agricultural Statistics Service



January 4, 2021

OMB No. 0535-0259; Approval Expires 09/30/2023

Dear Agricultural Producer,

The U.S. Department of Agriculture's (USDA) National Agricultural Statistics Service (NASS) is conducting the 2020 Local Foods Marketing Practices Survey. Your participation in this survey will help meet the growing need for data on the local food sector.

Your response is critical, especially given this challenging time. Agricultural stakeholders, local and federal decision-makers, and other data users want to know how this pandemic affected producers and the agricultural industry. It will also help to increase the understanding of this type of business and help evaluate and inform many of the USDA programs that support local food systems, including those provided by:

- Agricultural Marketing Service
- Farm Service Agency
- Food and Nutrition Service
- Risk Management Agency
- Rural Development

The 2020 Local Foods Marketing Practices Survey is part of the Census of Agriculture Program, and as such is required and protected by law (Title 7 USC 2204(g) Public Law 105-113). These federal laws require you to respond and the USDA to keep your identity and answers confidential. **Please complete this survey online or by mail by February 16, 2021.**

To learn more about NASS and the Local Foods Marketing Practices Survey, visit [www.nass.usda.gov/AgCensus](http://www.nass.usda.gov/AgCensus). If you have questions or difficulty completing your survey, please call toll-free 1-888-424-7828

Sincerely,

Hubert Hamer  
Administrator, National Agricultural Statistics Service  
United States Department of Agriculture



## Online Survey Response

The online questionnaire:

- skips questions that don't apply to you
- calculates totals automatically
- eliminates the need for return postage and data entry

### To complete your survey online:

1. Go to [www.agcounts.usda.gov](http://www.agcounts.usda.gov).
2. Enter your unique survey code, which is above the barcode on the front of the questionnaire, then click "Continue."

SURVEY CODE: 1111-11AA-AAAA



3. Find the survey you are completing and click on it.
4. Verify and complete your contact information, then continue to the survey.
5. Complete the survey questions.

If you need to stop, press the "Save & Return Later" icon at the top of the page. When you return, go back to Step 1 above. After the opening page, the survey tool will take you to the last page you visited.

6. When you finish the survey, click "Submit." *If you do not see the "Submit" button, reduce the zoom setting on your screen.*

You will receive a confirmation code and can choose to view your completed questionnaire. Using the options provided by your browser, you can copy, save, or print your form.





## 2020 LOCAL FOOD MARKETING PRACTICES SURVEY

This guide gives information on completing your survey form. If you need more help, call 1-888-424-7826, or email [nass@nass.usda.gov](mailto:nass@nass.usda.gov). The telephone call is free. Once you have completed your survey, please return it in the postage-paid envelope we have provided.

You may respond online at [www.agcounts.usda.gov](http://www.agcounts.usda.gov). This method is fast, easy, and secure.

If you do not return your form by February 16th, a second copy will be mailed. If you still do not return a completed form, we will contact you to arrange a telephone or personal interview.

**Why should I report?** The information to be gathered in the Local Food Marketing Practices Survey is vital to the USDA's and the public's understanding of the local foods sector, which in turn informs policymaking and program implementation. Section 10016(a) (1) (A) of the 2014 Farm Bill (P.L. 113-79) directs the USDA to collect data on "the production and marketing of locally or regionally produced agricultural food products," while Section 10016 (b) (2) requires the USDA to "conduct surveys and analysis and publish reports relating to the production, handling, distribution, retail sales, and trend studies... of or on locally or regionally produced agricultural food products." This survey fulfills those requirements.

**Who Should Report?** A reply is needed from EVERYONE who receives a report form, including persons who operated a farm, ranch or other agricultural operation in 2020 as well as those who were not involved in agriculture. More Local Food Marketing Practices Survey information is on the Internet at [www.agcensus.usda.gov](http://www.agcensus.usda.gov).

**If you were a landlord only and rented out all of your land,** complete the front page of the enclosed report form and return it in the preaddressed envelope. If you were a landlord but still operated other land yourself, you should complete the entire report form for that land which you operated.

**If you had no land, no livestock, and no agricultural operations,** return the report form with a note indicating your status on the front of the form below the address label.

**Partial Year Operations** - If you stopped farming during 2020, complete the report form for the portion of the year that you did farm. Write "Stopped farming during 2020" and the date you stopped farming below the address area. Mail the completed report form in the return envelope. If the person whose name is on the label was deceased during 2020, complete the form for the portion of the year that was farmed, and write a note.

**Involved in More Than One Operation** - If you made decisions for more than one operation, you may have received a report form for each operation. Provide information for only the operation name on the label.

**Partnership Operation** - Complete only ONE form for the entire partnership's agricultural operation and include the entire operation on that one form. If you made day-to-day decisions for more than one partnership operation, complete a report form for each separate operation.

**Specialty Commodities** - Bees, elk, emus, fish, nursery, maple syrup, etc., are an important part of the agriculture industry. Report for all commodities, regardless of the amount of production or sales you had in 2020.

**Received More Than One Report Form For the Same Operation** - If you received more than one report form for the same operation, complete only ONE form per operation. Write "DUPLICATE" below the address area of each extra form. Return all forms in the same return envelope with your completed form so that we can correct our records. If you received a green form and a blue form, complete ONLY the green form.

# 4 Page Instruction Sheet Mailed With Questionnaire



# Screening Questions

- In 2025, did this operation:
  - Grow any crops, Cut hay, or have Livestock, aquaculture, poultry, or honey bees?
    - If NO, skips to end of survey
- In 2025, did this operation produce and sell any crops, livestock, poultry, or agricultural products **directly to**:
  - **CONSUMERS**
  - **RETAIL MARKETS**
  - **INSTITUTIONS**
  - **INTERMEDIATE MARKETS**
    - If NO to all, skips to end of survey
- Were any of the products that this operation produced and sold directly to consumers, retail markets, institutions, or intermediate markets in 2025 **food for humans to eat or drink**?
  - If NO, skips to end of survey

# Sub-Section Screening Questions

- Sub-section screening for Sections 1- 4 is all the same.
  - Section 1: Direct-to-Consumer Sales
  - Section 2: Direct-to-Retail Market Sales
  - Section 3: Direct-to-Institution Sales
  - Section 4: Direct-to-Intermediate Market Sales
- During 2025, did this operation **produce and sell** any crops, livestock, poultry, or ag products **directly to.....?**
  - If “No”, skip to next section
- Were any of the products sold directly to.... in 2025 **food for humans to eat or drink?**
  - If “No”, skip to next section

# Our Goal

- We want to talk to operations that **PRODUCE and SELL FOOD**, for humans to eat or drink, directly through any of these markets
  - Abnormal operations like prisons, schools, etc. that produce food are not in scope for this survey.

# Market Channels



# Live Animal Sales

- Live animals that are sold with the established intent the animal will be immediately slaughtered for consumption should be included in this survey. Below are some examples to provide further clarification of criteria:
  - INCLUDE sales for human consumption when:
    - The consumer buys the live animal with the established intent to immediately slaughter for consumption, potentially incurring a separate fee.
    - The consumer chooses the live animal for purchase and the producer conducts or arranges for slaughter before giving it to the consumer
  - EXCLUDE:
    - Feedlots or large-scale poultry operations
    - Cattle on Feed
    - Animals for purposes other than human consumption, such as research, cosmetics, pets, clothing, breeding, mink, etc.
    - Animals harvested from Hunting operations

# Direct-to-Consumer Sales

- Direct-to-Consumer Sales **are considered** as:
  - Products sold through a farmer's market
  - Products sold through an on-farm store or farm stand located ON operation
  - Products sold through a roadside stand or store located OFF operation
  - Products sold through a CSA (Community Supported Agriculture)
  - Online marketplaces
  - Other direct-to-consumer markets (pick-your-own, mobile market, etc)



# Direct-to-Consumer Sales Cont.

- For Farmers Markets; Roadside Stand/Store; CSA, ask:
  - Total # of places operation sold product
  - Approx. miles (one way) from operation/area that received largest value of sales
  - Any products sold through this outlet that was produced by another operation?
    - How many other operations products were sold at this location

# CSA



# Direct-to-Consumer Sales Cont.

- Any product sold through an **online** marketplace? (transactions must take place online)
  - If someone orders online but pays at the farmers market, then that is a farmer market sale
    - Approx. % of sales sold to buyers living within the same state and/or 400-mile radius of operation
    - Owned by operation?
- Operation accept SNAP benefits with:
  - EBT (Electronic Benefit Transfer) owned by operation  
OR
  - Market at which the market administers SNAP payments with EBT

# Direct-to-Consumer Sales Cont.

- Markets that operation accepted SNAP benefits with EBT for food it produced and sold directly to consumers (select all that apply):
  - Farmers market
  - On-farm store or farm stand located ON operation
  - Roadside stand or store located OFF operation
  - CSA
  - Online Marketplace
  - Other direct-to-consumer market
    - Pick-your-own, mobile market, etc.
- Year operation first produced and sold food directly to consumers

# Sales

- Asked at the **end** of sections 1 - 4:
  - **Total Gross Sales sold through each of the (specific) markets for:**
    - **Fresh Fruit and Vegetable Sales**
    - **Meat, Farmed Seafood, and Egg Sales**
    - **Milk and Dairy Product Sales**
    - **Other Processed Food Product Sales**

# Other Processed Food Products

- A change in the physical state or form of the product (making strawberries into jam). The production of a product in a manner that enhances its value.
  - Include:
    - Bottled Milk
    - Cheese
    - Eggs in small carton
    - Meat
    - Wine, Jam, etc.
  - Exclude:
    - Non-edible agricultural products

# Other Processed Food Products

- To clarify processed meat sales:
  - To qualify as processed meat sales, the operation had to be involved in the butchering process.
    - It would not be included here if this operation sells a live animal to someone and then that person butchers it.
  - It would be included if this operation processes/butchers an animal (a steer for example) and then sells a portion of that meat to someone.

# Processed Products



# Direct-to-Retail Market Sales

- Direct-to-Retail Market Sales **are considered** as:
  - Supermarkets or supercenters; restaurants or caterers; other, such as independently owned grocery stores, food cooperatives, small food stores, corner stores, etc.
- Sell directly to a supermarket or supercenter
- Sell directly to a restaurant or caterer
  - For both: approx. miles (one way) operation located from supermarket/supercenter **and/or** restaurant/caterer where largest value of sales received
- Year operation first produced and sold food directly to a retail market

# Direct-to-Institution Sales

- Direct-to-Institution Sales **are considered** as:
  - K-12 schools; colleges/universities; hospitals; other such as workplace cafeterias, prisons, foodbanks, etc.
- Sell directly to:
  - K-12 school
  - College or university
  - Hospital
- For each institution:
  - Approx. miles (one way) from operation where largest value of sales received
- Year operation first produced and sold food directly to an institution

# Direct-to-Intermediate Market Sales

- Direct-to-Intermediate Market Sales **are considered** as:
  - Businesses, or organizations in the middle of the supply chain marketing *locally and/or regionally branded products* such as distributors, food hubs, brokers, auction houses, wholesale and terminal markets, and food processors.
- Which of these intermediate markets did this operation sell to in 2025
- Approx. miles (one way) from operation where largest value of sales received
- Year operation first produced and sold food directly to an intermediate market

# Other Information

- Total gross value of food sales produced and sold directly to consumers, retail markets, institutions, or an intermediate markets?
  - Pick the range
- What % of food sales were sold:
  - Within 100 miles OR less
  - More than 100 miles BUT less than 400 miles
  - 400 miles or more
    - Total MUST equal 100%

# Other Information

- Any crops, livestock, or ag product that operation produced or sold *directly to* consumers, a retail market, an institution, or an intermediate market **NOT food for human consumption?**
  - Include:
    - Hay, Cut flowers, Christmas trees, Nursery products, Live animals, Wool
  - Exclude:
    - Edible agricultural products for human consumption

# Acres Operated

- How many acres did this operation:
  - Own
  - Rent/Lease from others
  - Rent to others
    - Owned + Rent/lease – Rent to = Total acres operated

Be sure to include all acres operated, not just the portion used for directly marketed production

# Crops & Livestock Produced

- Select which agricultural products this operation produced and sold (**regardless of the marketing channel**).
  - 16 categories (mark Yes or No)
- Then **which of these products were also sold for food** to consumers, retail markets, institutions, and/or intermediate markets



# Crops & Livestock Produced, cont.

*Crops & livestock the operation produce and sell an agricultural product in 2025 regardless of marketing channel and any food produced and sold directly to consumers, retail market, institution or intermediate market*

- Grains, Oilseeds, Dry Beans, & Dry Peas
  - Tobacco\*
  - Cotton & Cottonseed\*
  - Vegetables, Melons, Potatoes, & Sweet Potatoes
  - Fruit, Tree Nuts, & Berries
  - Nursery, Greenhouse, Floriculture, & Sod
  - Cut Christmas Trees & Short Rotation Woody Crops\*
  - Other Crops, Hay, CRP, & Pasture
  - Hogs & Pigs
  - Milk & Other Dairy Products from Cows
  - Cattle & Calves
  - Sheep, Goats, & their Products
  - Horses, Ponies, & Mules\*
  - Poultry & Eggs
  - Aquaculture
  - Other Animals & Other Animal Products
- \*Are not asked for produced and sold food *directly*



# Gross Value of Sales

- Total Gross Value of Sales (entire farm)
  - Include:
    - Government agricultural payments
    - Sales of all crops, livestock, poultry, and livestock products
    - Value of hay, silage, and other crops harvested but not sold
    - Value of all crops, livestock, and poultry produced under contract
    - Landlord's share of gov. payments and crops sold

# Operation Expenses

- Operation's **Total Expenses** in 2025
- **Marketing Expenses** paid by operation **for the food produced and sold directly to consumers** (should have been included in total expenses)
  - Hired labor to work at marketing outlet
  - Transportation/Distribution costs
  - Promotional/Advertisement costs
  - Equipment/Supply costs
  - Food Safety
  - Other (market fees, licenses, insurance, etc.)

These must add back to the total marketing expenses



# Internet

- Did operation have internet access, either on the operation and/or at principal operation's residence?
- Internet used to access the following:
  - Purchasing input supplies, commodities, equipment, and other materials for farm
  - Peer learning resources
  - Business products and services
  - Submitting funding, grant, subsidy requests/proposals
  - USDA Market News price and market information
  - Price and market information from other sources

# Farm Business Website

- Did operation have a farm business website?
- Use farm business website to:
  - Provide background/history on farm and practices
  - Advertise products for sale and on-farm activities/services
  - Carry out transactions and sell farm products online
- Use social media to:
  - Provide information about the farm or operation
  - Provide market channels where consumers can buy its products

# Programs

- Did operation participate in the following programs:
  - Noninsured Crop Disaster Assistance Program
  - Farm Loan Programs
  - Whole-Farm Revenue Protection Program
  - Federal crop insurance
  - Environmental Quality Incentives Program (EQIP)
  - Value-Added Producer Grant Program
  - Etc., Etc.....
    - Just marking Yes or No

# Management Records

- Did this operation maintain the following farm management records:
  - Balance sheet
  - Income statement
  - Cash flow budget/projection
  - Written business plan
  - Separate marketing plan
- Was operation a member of a cooperative?
- Any agritourism activities? (pick your own, event hosting, dining/tasting, overnight lodging, etc.)

# Third-Party Certification

- Did operation have the following practices certified or verified by a third party:
  - USDA Certified Organic
  - Pasture-based management
  - Animal care-based management
  - Naturally Grown Certified
  - Other USDA labels/quality verification
  - Local or regional product origin 3<sup>rd</sup> party certified or verified practices excluding food safety certification



# Third-Party Certification



# Food Safety

- Food safety plan that covered produce?
  - Include:
    - Fruit, berries, vegetables, herbs, tree nuts, dry beans, peas & lentils, peanuts, sprouts, and mushrooms
  - Is the food safety plan written?
  - Have a 3<sup>rd</sup> party food safety audit of produce?
- Did operation receive:
  - USDA Individual Good Agricultural Practice (GAP) cert.
  - Other 3<sup>rd</sup> party GAP cert.

# Personal Characteristics

- Household and extended family own more than 50% of this farming operation
  - Exclude land rented/leased
    - Held by non-family landlords and/or contractors
- Number of individuals *involved in the decisions* for the operation
  - # of men
  - # of women
    - Exclude hired workers unless they were a hired manager/family member

# Personal Characteristics Cont.

- Demographic Information
  - Up to 4 individuals involved in making decisions
    - Sex, age, race, primary occupation, etc.

# Things To Watch Out For

- Large miles from [specific] channel sales
  - Should only be one way
- Sum of dispositions:
  - Percent of sales **MUST** = 100%
- Acres owned + acres rented/leased from – acres rented/lease to = total acres operated
- Only looking for anything **before** 2026
  - Activities in 2026 should be *excluded*

# Out of Business

- If the operation didn't have any sales or production
  - Leave good notes
    - What happened? New Operator? Any other info?

# Reluctant Response

- Why should I participate? What's in it for me?
  - I understand your time is valuable. With interest in local foods increasing substantially, it's important that we get a clear picture of the local food production sector. As of now there is not a current benchmark in regards to sales, production practices, risk management, etc. With your help this study will provide important national, regional, and state-level information that decisions will be made from.

# Conclusion

- A comprehensive look at locally grown foods and the different market channels
- Get to know the specific includes/excludes
- Comments, Concerns, Questions?
- Practice Exercises
- Have a good survey!

