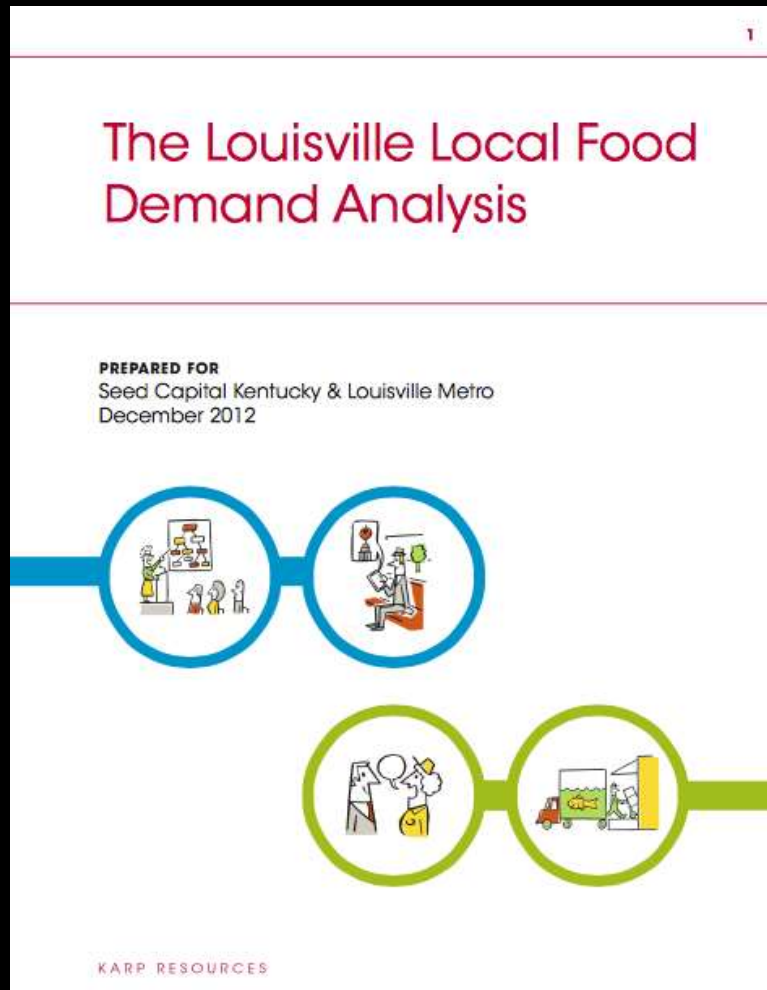




THE BERRY CENTER

**Local Food From Local Farms Making Local Decisions
A Supply-Side Examination of the Louisville Foodshed**

2012 Local Food Demand Study



- Demand for local food outpaces supply by 5X
- \$158 million among consumers
- \$139 million among commercial buyers

"At every point in our food economy, present conditions remaining, we must expect to come to a time when demand (for quantity or quality) going up will meet the culture coming down."

- Wendell Berry, "Nature As Measure"

Changes in Rural Landscape

- KY had the **greatest % decrease** in farmland (**6.7%**) of any state between 2007 and 2012
 - Alaska (5.4%)
 - Georgia (5.2%)
 - Mississippi (4.6%)
 - Wisconsin (4.1%)
- The number of farms in Kentucky also declined, from **85,260** in 2007 to **77,064** in 2012.

Study Area: Louisville Foodshed

- Anderson
- Boyle
- Breckinridge
- Bullitt
- Carroll
- Franklin
- Gallatin
- Hardin
- Henry
- Jefferson
- Larue
- Marion
- Meade
- Mercer
- Nelson
- Oldham
- Owen
- Scott
- Shelby
- Spencer
- Trimble
- Washington
- Woodford
-

Key Measures to Test

- Who is **producing** food for the **local market**? What are they producing?
- Who is **interested** in producing food for the local market, **but has not yet**?
- What are **key demographic factors** differentiating locally engaged producers and ones not selling into local markets?
- What is **land use** in the region and how does land use for producers selling into local markets differ from the averages?
- How are producers using **market-finder resources**? What works for them? What doesn't?
- What is the understanding of a **short supply chain**? Are producers interested in growing food for such a chain?

Key Measures to Test (2)

- What producers are **interested** in growing particular crops or raising livestock for **agreed-upon price**?
- What **barriers** to **land** and **capital** exist in the region?
- What is the **land use** in the region? Cropped, fallow, pasture, hay; Rented/owned; How many crops?
- **Level of satisfaction** with existing local marketing opportunities.
- **Farmer perception** of the **market demand** for their product locally.

Interim Report Findings

- 119 Survey Responses
- 22 Key Informant Interviews (Ext. Agents)
- USDA Ag Census Data
 - Over 17,000 farms in region
 - 78% have less than \$25,000 in annual sales
- Survey Data
 - 52% make less than \$25,000 in sales

Experience in Farming

USDA Ag Census Data

- 83% = more than 10 years of experience

Supply-Side Survey

- 53% = more than 10 years of experience
- 19.1% = less than 5 years of experience

Direct Markets (USDA Ag Census)



Anderson County

- 38 farms = 2007
- 20 farms = 2012

Nelson County

- 54% decrease from 2007-2012

USDA Ag Census Data

- 5% = farms in 23 county area **entering direct markets**
- \$4.8 M in sales

Gallatin, Scott, Woodford, Oldham, and Carroll Counties

- Increase from 2007-2012

Direct Markets (Supply-Side Study)



Supply-Side Study

- 72% = farms in 23 county area entering direct markets
- 57% = want to increase selling to direct markets

- 82% = 1 link in supply chain
- 26% of farmers = 10% + of total sales from farmers markets
- 27% of farmers = 10% + of total sales from on farm sales and 9% CSA shares
- 83% of farmers = want to increase on-farm sales (opposed to farmer's markets and CSA shares)

What Farmers Are Saying...

“Too much time involved for a producer to make a profit from selling to local markets”

“I know there is demand, but meeting with the buyers and knowing who and where they are, and what exactly what they want is difficult.”

“The unmet demand may be for ‘cheap’ local foods. We can produce a lot more, but the market price is so low, it doesn’t make sense to do it.”

What Farmers Are Saying...

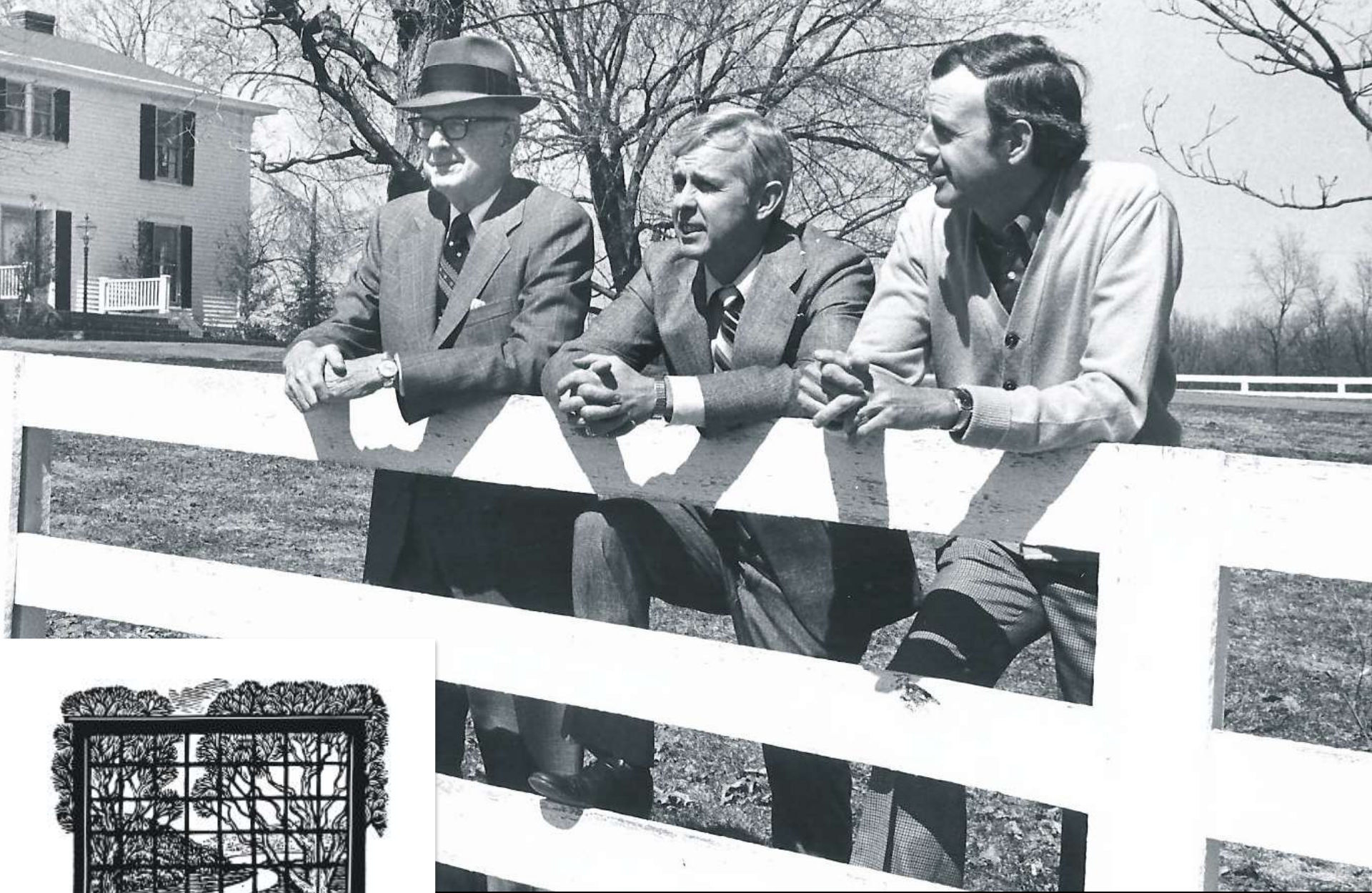
Over 71% would be interested in growing specific produce/livestock at an agreed-upon price prior to the beginning of production.

Supports needed:

- Help bringing similar producers together to exchange information (50%)
- Information on potential buyers (76%)
- Information on value-added processing opportunities and resources (57%)

“It’s hard to be profitable enough to make a living.”

– Diversified fruit, vegetable, grain, and livestock producer selling mostly through farmer’s markets and stockyards with over 25 years of farming experience



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