FARMER-TO-CONSUMER MARKETING

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SUMMARY

Estimates of direct marketing by producers to consumers for 1976 indicate there are 8,915 roadside stands, 3,069 pick-your-own operations and 541 of the more permanent farmers' markets operating in 41 of the 50 States and in the District of Columbia. Estimates for those States not reporting bring the total estimated outlets to over 13,000. Roadside stands in 17 States alone grossed almost $209 million in 1976.

Most items sold through direct marketing outlets are fruits and vegetables. Other items include eggs, dairy products, meat, poultry, baked goods, tree nuts, honey, shrubbery, and handicrafts.

Farmers view direct marketing as an alternative outlet to increase their income. Consumers see it as a means of getting fresher, higher quality foods at less cost. Consumers also find the markets convenient and friendly places to shop.

Under the Farmer-to-Consumer Direct Marketing Act of 1976, eight States were awarded funds in fiscal year 1977 to encourage and promote direct-marketing activities. Projects funded range from a joint Georgia-South Carolina effort aimed at low-income consumers and limited-resource farmers, to New Jersey's educational film production for producer and consumer groups.

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INTRODUCTION

There appears to be revived interest in the original method of selling farm products--direct marketing by producers to consumers. Farmers, especially small and part-time farmers, view direct marketing as an alternative market outlet to increase their income. Consumers see it as a means of gaining access to fresher, higher quality foods at less cost. Consumers also envision social and cultural benefits from direct contacts with farmers, visits to farms, and a so-called return to nature.

Passage of Public Law 94-463, the Farmer-to-Consumer Direct Marketing Act of 1976, reflects national interest in direct marketing of farm products. There is strong evidence of increased attention by the States, and a number of educational and supportive programs are being sponsored by State cooperative extension services and departments of agriculture and commerce. At a more local level, municipal agencies, consumers, and public interest groups are supporting or sponsoring direct-marketing activities. An apparent growth in consumer food-buying clubs and cooperatives, while not directly related to direct marketing of farm products, shows a concern on the part of consumers in developing alternatives to the supermarket as a source of food.

This report brings together available information to describe the current status of direct marketing of agricultural products in the United States.

Methodology

To obtain information on the current status of farmer-to-consumer direct-marketing activities, the Economics, Statistics and Cooperatives Service investigated fruit and vegetable marketings, compiled secondary data from all known published sources, and queried selected individuals knowledgeable in such activities, including extension marketing specialists and/or State department of agriculture personnel in all 50 States. These contacts provided expert estimates and opinions on the extent and direction of farmer-to-consumer direct marketing of fruits and vegetables across the country. Published materials available from the contacts are listed in the bibliography.

The most recent survey of the extent of direct-marketing activities was made by the American Vegetable Grower in the fall of 1976 (2). 1/ This involved a mail survey of agricultural economists and horticulturists at land-grant universities in all 50 States. Respondents were asked to provide estimates of the number of various types of direct-marketing outlets operating in their States, and the approximate volume of gross sales of fruits and vegetables from these outlets. Most of the information available on direct marketing nationwide is of this same nature. Little is based on a survey of a representative sample of producers, direct-marketing outlets, or consumers.

Information also was obtained from some individual State surveys of direct-marketing activities. New Hampshire, for example, has detailed figures on the actual crop-by-crop percentages of total sales directly marketed at roadside stands and through pick-your-own operations. Louisiana has interviewed consumers to find out the when and why of patronage habits at farmers' markets in that State (5). Minnesota has looked closely at direct-marketing activities within the State, and at other alternative food sources, such as backyard gardening and home canning and freezing (4).

DIRECT MARKETING

Direct marketing of agricultural products is not a new phenomenon. It is the original, purest type of food distribution. As soon as the first city became a reality, there existed a market for agricultural produce at a place away from the production location. Personal selling by the grower gave way to a distribution network that evolved through various stages of small shops to the modern 30,000-square-foot supermarket. In recent years, however, a

1/ Underscored numbers in parentheses indicate references listed at the end of this report.

reverse trend seems to have emerged. For reasons ranging from the economic "direct farm-to-consumer marketing is the only way to lower food food prices" to the nostalgic "it smells like the country... I feel like I'm in another time", consumers are returning to shop at direct-marketing outlets.

Direct marketing may take many forms. The most familiar types of outlets are probably roadside stands, pick-your-own operations, and farmers' markets. Some direct sales also are made from trucks parked at shopping centers, on door-to-door routes through urban and suburban neighborhoods, from small, on-farm dairy outlets, and through farmers' cooperatives dealing directly with consumer groups, such as buying clubs and consumer co-ops.

Informal arrangements between friends and neighbors move additional small quantities of agricultural produce from farmer to consumer, especially in some rural areas. Custom livestock slaughtering in some Western States is another example of direct marketing.

Items most frequently sold through direct-marketing outlets are fruits and vegetables, and to a lesser extent, eggs and dairy products. In some States, meat and poultry are sold directly to consumers, as are baked goods, tree nuts, honey, sirup, bedding plants, shrubbery, Christmas trees, and handicrafts. As fruits and vegetables make up the majority of sales, the figures in this report concern mainly these items.

Areas of heavy fruit and vegetable production generally have the greatest amount of activity in direct marketing, and the States involved tend to be those with high population concentrations. In other words, for populous areas in which the commercial agriculture of the region is in fruits and vegetables, or other products particularly suited to direct marketing, the potential for direct marketing seems to be more current and advanced.

The relationships among State population, fruit and vegetable production, and direct marketing are illustrated in table 1, with the Northeast, the Great Lakes, California, and Florida emerging as leaders. As one observer noted, a direct-marketing outlet must have "enough goods to make the trip worthwhile for customers, enough customers to make the trip worthwhile for farmers" (6).

Florida and California present a special case when it comes to evaluating the impact of direct marketing.

Although they do not have the population density of the Northeast and Great Lakes, for years they have had numerous roadside and edge-of-town retail markets where purchases are made directly from producers. A small but significant volume of fruit has moved in this manner, especially in Florida.

Relatively short growing seasons and low population concentrations help to explain the apparent low level of direct-marketing activities in States such as Alaska and Wyoming. Also, the agriculture of many Plains and Mountain States is concentrated in grain and cattle, which do not readily lend themselves to direct marketing. Much the same can be said for large agricultural regions of the South; cotton and tobacco for example, are seldom marketed directly to the end-user.

Exceptions can be found, of course, such as the apples grown in the southeastern corner of Nebraska and in western Colorado, or the fruit and vegetable production in south-central Kansas. In States where commercial agriculture is more oriented to grains, there are small and part-time farmers around population centers who are interested in alternative crops suitable for direct marketing.

Table 1--Relationships among State population, fruit production, vegetable production, and direct marketing

Ranking	Population 1/		Fruit production/ sq. mile 2/	Vegetable production/ sq. mile 2/	Direct-marketing outlets
	Per sq. mile	Total			
	States				
1	N.J.	Calif.	Fla.	N.J.	N.Y.
2	R.I.	N.Y.	Calif.	Calif.	N.J.
3	Mass.	Pa.	Wash.	Fla.	Ohio
4	Conn.	Tex.	N.J.	N.Y.	Mich.
5	Md.	Ill.	N.Y.	Del.	Pa.
6	N.Y.	Ohio	Mass.	Mass.	Calif.
7	Del.	Mich.	Mich.	Mich.	Conn.
8	Pa.	N.J.	Pa.	Conn.	N.C.
9	Ohio	Fla.	Conn.	S.C.	Ind.
10	Ill.	Mass.	Va.	Md.	Tex.

1/ Source: Census of the Population: 1970.
2/ Source: Agricultural Statistics, 1975.

Table 2 is a roughly estimated summary of direct marketing activities in the United States. It includes outlets in the three major categories--roadside stands, pick-your-own operations and farmers' markets. Data for this summary table are from the American Vegetable Grower survey of direct marketing outlets (2), and various State Government, extension, and university sources. Estimates for all three major types of direct-marketing outlets show at least 12,525 in operation in 1976. Estimates for nine States not reporting bring the total to about 13,000.

According to the American Vegetable Grower survey, gross sales from direct marketing outlets in Indiana increased from about $2.5 million in 1971 to $6 million in 1976. Maryland reported in the survey that during those years, the number of roadside markets and pick-your-own operations increased an estimated 25 percent and 100 percent, respectively. Research done at the State University-Rutgers, New Brunswick, N.J., indicates that roadside markets in Michigan doubled in number during 1965-1975, and that the volume of business increased at an even greater rate.

Roadside Stands

There were an estimated 8,915 roadside fruit and vegetable stands in the United States in 1976. A roadside stand is a commercial farm market operated by a full- or part-time grower. States with the greatest number of such markets include New Jersey, New York, Ohio, Pennsylvania, California, Connecticut, Michigan, and Texas (table 2).

This talley does not include 12 States for which estimates are not available. Several of these States probably also have direct-marketing enterprises. States such as Kansas and Washington are known to be active in some aspects of direct marketing, and despite their relatively short growing seasons, would probably add another 100 to 200 roadside stands to the count. About the same number may exist in the remaining States, bringing the total number of roadside stands to roughly 9,300.

Top-ranking States in estimated gross sales from roadside stands included New Jersey, Pennsylvania, New York, Ohio, and Massachusetts (table 3).

Table 2--Direct-marketing outlets for farm products, 1976

State	Roadside stands	Pick-your-own operations	Farmers' markets	Total estimated outlets
Alabama	160	240	1/ 15	415
Alaska	12	NA	1	13
Arizona	35	5	NA	40
Arkansas	1/ 100	1/ 40	15	155
California	1/ 600	100	1/ 15	715
Colorado	15	NA	NA	15
Connecticut	1/ 600	1/ 50	6	656
Delaware	115	25	1/ 3	143
District of Columbia	0	0	3	3
Florida	200	100	30	330
Georgia	1/ 60	1/ 70	19	149
Hawaii	5	NA	10	15
Idaho	NA	NA	NA	NA
Illinois	1/ 200	200	1/ 20	420
Indiana	1/ 400	1/ 125	1/ 12	537
Iowa	1/ 85	1/ 25	1/ 6	116
Kansas	NA	NA	NA	NA
Kentucky	1/ 100	20	4	124
Louisiana	NA	NA	20	20
Maine	180	25	1/ 12	217
Maryland	1/ 250	100	1/ 4	354
Massachusetts	370	1/ 40	1/ 7	417
Michigan	1/ 550	1/ 300	1/ 28	878
Minnesota	NA	NA	NA	NA
Mississippi	1/ 70	20	1/ 7	97
Missouri	60	80	20	160
Montana	NA	NA	NA	NA

1/ See footnote at end of table.

Continued--

Table 2--Direct-marketing outlets for farm products, 1976--Continued

State	Roadside stands	Pick-your-own operations	Farmers' markets	Total estimated outlets
Nebraska	NA	NA	2	2
Nevada	NA	NA	NA	NA
New Hampshire	350	50	1/ 5	405
New Jersey	810	130	1/ 14	954
New Mexico	100	1/ 40	NA	140
New York	1/ 800	1/ 330	60	1,190
N. Carolina	1/ 300	250	1/ 35	585
N. Dakota	1/ 3	1/ 12	1/ 2	17
Ohio	1/ 600	1/ 300	1/ 20	920
Oklahoma	NA	NA	NA	NA
Oregon	NA	NA	1/ 12	12
Pennsylvania	1/ 600	1/ 100	70	770
Rhode Island	1/ 30	1/ 12	1/ 2	44
S. Carolina	30	15	2	47
S. Dakota	100	1/ 10	NA	110
Tennessee	1/ 150	1/ 100	1/ 14	264
Texas	1/ 500	1/ 10	1/ 10	520
Utah	NA	NA	NA	NA
Vermont	1/ 140	15	1/ 15	170
Virginia	20	40	14	74
Washington	NA	NA	NA	NA
W. Virginia	1/ 95	1/ 50	1/ 7	152
Wisconsin	120	40	NA	160
Wyoming	NA	NA	NA	NA
Totals	8,915	3,069	541	12,525

NA--Estimate not available.

1/ Estimates are from (2). All other numbers are primarily based on estimates provided by State sources.

Table 3--Estimated gross sales of roadside stands, 1976 1/

State	Gross sales
	1,000 dollars
New Jersey	50,000
Pennsylvania	40,000
New York	35,000
Ohio	30,000
Massachusetts	24,750
Indiana	6,000
Maryland	5,000
Michigan	4,500
New Hampshire	3,230
Arizona	2,875
Tennessee	2,500
Texas	2,500
Georgia	750
Rhode Island	750
North Carolina	580
South Dakota	375
North Dakota	20
Total	208,830

1/ Estimates not available for all States.
Source: (2).

Pick-your-own Operations

Pick-your-own operations for 1976 are estimated at 3,069, with no information available for 15 States. This number includes only planned operations as opposed to those run as clean-up operations toward the end of harvest-time. Some of the pick-your-own operations were operated in conjunction with already established roadside stands.

Leading States in the number of pick-your-own operations include New York, Ohio, Michigan, North Carolina, Alabama, and Illinois (table 2). Over 60 percent of the operations sold primarily fruits, and about 35 percent sold primarily vegetables.

Farmers' Markets

Farmers' markets are one of the oldest methods of direct marketing. They are more formalized, and possibly more permanent, than the other direct-marketing operations. They are located in either publicly or privately owned market places where a grower rents space in which to display and sell produce. Most students of direct marketing say that farmers' markets are increasing in number across the country. Although an accurate count is not available, there were an estimated 541 farmers' markets in 36 States and the District of Columbia in 1976. For the entire United States, the number probably approached 600.

ATTITUDES TOWARD DIRECT MARKETING

At least two States, Louisiana and Missouri, have completed studies to evaluate consumer reactions to farmers' markets (5 and 3, respectively). The Agriculture Council of America also recently surveyed some 2,500 consumers on certain aspects of farmer-to-consumer direct marketing (1).

In the Louisiana study, published in March 1977, over 70 percent of the respondents considered themselves to be regular shoppers at farmers' markets. The main reasons noted for shopping there centered on the consumers getting fresher produce (50 percent) at better or more economical prices (19 percent), such markets were conveniently located for the shopper (7 percent), and the markets provided a friendly atmosphere in which to shop (5 percent). Nearly 90 percent of the Louisiana respondents indicated that they found both the price and quality of produce in farmers' markets to be acceptable or highly acceptable. The favorite items purchased in the Louisiana farmers' markets were tomatoes, sweet corn, and string beans. The morning hours of Tuesdays, Fridays, and Saturdays were indicated as preferred shopping times.

In the Missouri study, respondents ranked product quality, variety, and lower price as the top factors drawing them to farmers' markets. Friendliness and atmosphere were the next most frequently mentioned advantages. Consumer dissatisfaction with certain aspects of the Missouri farmers' markets centered on the automobile--heavy traffic and inadequate parking. Despite such complaints, 95 percent of the respondents said they wanted direct marketing of farm produce to be encouraged in the future. Missouri vendors were generally satisfied with such markets as an outlet for their products. These markets provided a means of improving their income with minor expenses (small rental and utility charges were the only costs to vendors). Those complaints voiced mainly related to inadequate facilities and promotion--vendors wanted more publicity and advertising to attract both customers and other vendors.

A telephone survey of 500 randomly selected households in Minnesota during the summer of 1976 revealed that, during 1975, 35 percent of the respondents had purchased food from a roadside stand. Over 13 percent also had bought food from a pick-your-own operation, and 6 percent had made purchases at a farmers' market (4).

The nationwide survey of 2,500 consumers conducted by the Agriculture Council of America (1) reveals that 79 percent of the consumers felt that "the interests of farmers and consumers are similar enough to warrant joint action." A large majority of the respondents to this survey also said they were dissatisfied with food prices, and 90 percent saw direct farmer-to-consumer marketing as a possibility for cutting costs. As one respondent put it, "Direct farmer-to-consumer marketing is the only way to lower food prices."

None of these studies of consumer attitudes and opinions about direct marketing are based on a representative sample of the entire Nation. However, the findings do provide some insight as to the satisfaction derived from, or perceived to exist in, direct marketing by a portion of the population.

THE FUTURE OF DIRECT MARKETING

Farmer-to-consumer sales are encouraged in numerous ways. The Farmer-to-Consumer Direct Marketing Act of 1976 offers financial aid, educational programs, and technical assistance in forming direct marketing outlets. Thirty-nine States submitted a total of 44 proposals for direct-marketing projects which might be funded under the Direct Marketing Act. For fiscal year 1977, eight States were awarded funds for projects, including Arizona, Florida, Georgia and South Carolina jointly, Illinois, Michigan, New Jersey, and New York. The projects range from a joint Georgia-South Carolina direct-marketing effort aimed at low-income consumers and limited-resource farmers, to a New Jersey educational film production for presentation to both producer and consumer groups. Additional States are expected to receive funds under the Direct Marketing Act in fiscal year 1978.

Some States, notably New Jersey, Ohio, Maryland, and Pennsylvania, and conduct annual conferences which facilitate the sharing of information among producers, consumers, and others concerning the establishment and operation of direct-marketing outlets. Such conferences will continue in years to come.

During the summer of 1976, California's Department of Food and Agriculture sponsored a clearinghouse for surplus tree fruits, especially cling peaches, pears, and apricots. The clearinghouse used toll-free telephone numbers to put potential customers directly in contact with farmers who had unsold produce available. All details regarding quantities and prices were worked out between individual farmers and consumers.

Conservative estimates place sales via the clearinghouse at 1,350 tons. The apparent success of the California clearinghouse experiment might lead to its becoming a permanent feature of direct marketing, not only in California but in other States as well. Many very small or part-time farmers may still need to somehow pool their production, through a cooperative or some similar arrangement, in order to be a factor in direct marketing of any sort.

If enthusiasm shown at the State level can carry direct marketing into the lives of more producers and more consumers, then farmer-to-consumer marketing has a promising future.

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