BRINGING OUR FARMS INTO FOCUS

Specialty food crops, farm viability and market profitability in West Virginia

by WVU Food Justice Lab on behalf of the West Virginia Food & Farm Coalition
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Executive Summary

The mission of the West Virginia Food & Farm Coalition (WVFFC) is to improve the viability of the local food sector statewide by building and supporting a statewide network of those involved in West Virginia’s local food economies. To achieve this mission the West Virginia Food & Farm Coalition works to support food and farm business, promote access to local foods, share resources, reform agricultural policy, study the local food sector, and tell West Virginia’s food and farm story.

In this report we present findings from a statewide study of the production and marketing of specialty food crops and the viability of this form of agriculture for small-scale farmers in West Virginia. Specialty food crops are the most common items found in farmers markets and include fruits and vegetables, tree nuts, dried fruits, mushrooms, honey and other horticultural crops. The promotion of local and regional food economies often prioritizes this form of agricultural production and specialty food crop producers have been a core constituency represented in the advocacy and programming of the West Virginia Food and Farm Coalition. While specialty food crop producers currently make up a very small percentage of the total farming sector in West Virginia, they hold great potential in promoting sustainable development, economic growth and improving community health in the Mountain State.

Key Findings

Small Farms, Diverse Production, Great Potential. According to our study the average farm size among specialty food crop producers is 92 acres with just 3.3 acres in specialty food crop production and 6.2 acres in pasture. Specialty food crop farmers engage in diverse agricultural practices. Farmers in our study primarily produce vegetables (73%) while many also raise livestock (59%), produce some fruit (58%), and eggs (46%). Given the study results, we estimate that specialty crop production made up 1% or less of the total agricultural land in production in West Virginia in 2017.

Income Barriers Hold Farmers Back. The statewide average annual revenue for all specialty food crop producers was just $31,505 in 2017. However farm income was highly uneven. 76% percent of producers report $50,000 or less in gross revenue from farm sales. 49% of specialty crop producers report less than $10,000 per year and 31% of farmers bringing in less than $5,000 in gross revenue.

Not all specialty food crop farmers are created equal. We break down producers into a typology of commercial producers ($100,000 per year), entrepreneurial producers ($50,000 and $100,000 per year), small-scale producers ($25,000-$50,000), micro-scale producers ($10,000-$25,000) and emerging producers (under $10,000). Each of these producer types makes different decisions, participates in different markets, produces different crops, and has different resource endowments.

Emerging Farmers and Specialty Food Crops. Emerging farmers with five years or less of experience (34%) and farmers with less than 20 years of experience (20%) make up the majority of specialty food crop producers. However, growers with more than 20 years experience (46%) tended to report higher incomes from farming. Understanding the differences, special needs, and potential generational conflicts and economic competition between these grower groups is important.
**Part-time Farmers are Prevalent.** On average specialty food crop farmers reported that on-farm activities accounted for only 28% of their annual household income. 69% of farmers reported significant income from non-farm sources including off-farm employment, retirement income, spousal income, and other income (such as rental properties etc.) which also contributed to annual income. 39% of all farmers had full-time off-farm employment. 1 in 3 farmers (31%) reported retirement income and 1 in 5 reported that more than half of their annual income comes from retirement funds. Furthermore, 1 in 4 farmers (26%) reported spousal income.

**Full-Time Farmers are Few and Far Between.** Only 19% of specialty crop producers in WV (1 in 5) are full time farmers and derive all of their reported income from their farm. Among these full-time producers their reported gross revenues were just $40,933.

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**Next Steps**

Given these findings we recommend the following next steps for the WV Food and Farm Coalition and partners as we advance specialty food crop production networks and the local farm sector in West Virginia.

- Building Pathways for Beginning and Emergent Farmers
- Forging and Sustaining Full-Time Farming Opportunities
- Diversifying Market Participation
- Enhancing Culture of Association, Building Cooperatives
- Reducing Barriers to Food Access
Methodology

To understand specialty food crop production, marketing and farm viability we conducted interviews and a survey with one hundred forty-one (141) specialty food crop producers across West Virginia. The field research was conducted from June-October 2016, and June-August 2017. We recruited participants from a list of 326 specialty food crop producers compiled by the WVU Food Justice Lab (FJL) and West Virginia Food & Farm Coalition (WVFFC). We also expanded our sample of farmers by recruiting additional participants at 20 farmers markets across the state, with farmers’ markets to gain a representative sample from all WVFFC designated foodsheds. All study participants fell within the category of specialty food crop producers as defined by the USDA. In our survey instrument we collected data on quantitative measures of acreage, production, and income. Our interviews concentrated on qualitative data about production challenges, market participation, motivations and their perspective on specialty crop production and farm viability.

Specialty Food Crop Production and Farm Viability

According to the 2012 Census of Agriculture\(^1\), there are an estimated 21,488 farms in West Virginia composing 3,606,674 acres of farmland of which 804,006 acres are employed in crop and livestock production. Seventy-three percent of all farm properties are less than 180 acres indicating that most WV farms are relatively small-scale. Only 43% of principal farm operators work on their farm full-time. The dominant agricultural land use among these WV farms and farmers is raising beef/cattle (45% of farms) and the production hay or other feed crops in support of livestock production (34% of farms). Other agricultural land uses included small livestock production such as raising pigs/hogs (0.7% of farms), poultry/eggs (3% of farms), sheep/goats (3% of farms) and other animal production (8.6%). Census respondents report an average of just $2,205 in cash income from farming and a total farm income after taxes and expenses of just $447. This suggests that profit-making in the farming sector is rather limited or concentrated within a particular agricultural sector (i.e. livestock) or among a particular scale of producer (i.e. larger commercial producers).

\(^{1}\) The Census of Agriculture defines a farm as “any place from which $1,000 or more of agricultural products were produced and sold, or normally would have been sold, during the census year.” The Census of Agriculture is conducted by the United States Department of Agriculture (USDA) every five years. The most recent census was conducted in 2012, and the results were reported between 2013 and 2014. The Census of Agriculture relies on past census reports, collaboration with community agricultural groups, and even interpretation of aerial photography in order to update and maintain its extensive list of farmers across the country. Each farmer on this list is issued a census form to complete. The Census of Agriculture uses postcards, call centers, and online communication in order to follow up with farmers who do not return the form. The 2012 Census of Agriculture had a response rate of about 80% for the 3,009,641 farms on their mailing list.
Farmer Motivations, Farm Viability and Market Participation

To understand specialty food crop production, farm viability and market participation, it is critical to start with farmers. Farmers are people. Many studies in rural development begin from the assumption that farmers approach agriculture based solely upon conventional economic rationales including profit-making, enterprise growth, and wealth accumulation. However, we find that farmers, especially food crop producers in West Virginia, articulate complex rationales that complement and deviate from these economic assumptions. Indeed, many specialty food crop producers in West Virginia grow food for their local and regional economies in spite of low economic returns. Explaining farm viability and market participation therefore requires a broader analysis that accounts for motivations.

“‘It’s in our soul. It is what we have to do. We try to do other things and always end up back here. We have a passion for it.’

Only a small percentage of WV farms (4%) engage in specialty crop production. The Census indicates that, as of 2012, there were a total of 470 vegetable producers and 438 fruit producers in West Virginia. While specialty crops remains a small percentage of crop production in WV, vegetable and fruit production are more prominent in some counties than others. Among farms engaged in specialty crop production more than 50% are located within 15 counties including Berkeley, Hampshire, Marshall, Greenbrier, Preston, Upshur, Wood, and Monroe, Putnam, Cabell, Jefferson, Mason, Nicholas, Pocahontas and Randolph counties. However, while agricultural census data provide an important entry point into specialty crop production, it offers less insight into the complex economic and social challenges identified by farmers to improve farm viability and promote market development in West Virginia. What more can we learn about specialty food crop production? How can we advance this form of agriculture to improve the viability of the farm sector and to enhance community health and well-being in the Mountain State?
Farmers referenced a range of more-than-economic rationales for growing specialty food crops from their family dynamics, lifestyle choices, ethical reasons, and the promotion of personal or community health. These more-than-economic rationales serve as key motivations are clearly significant to them for starting and sustaining their farm operation. More than half of the farmers in our study were first generation farmers while the others described farming as an aspect of their heritage. Farmers often described family heritage and experience in agriculture, their economic obligations to a spouse, children, or parents, or a desire to produce healthy food for their family or community as key reasons why they started farming. Other family-based rationales included teaching their children a sense of responsibility, supporting an ailing family member or parent, or assisting a spouse to realize their dreams of operating a farm.

“I started growing as a hobby, it was just something I wanted to do. I grew up on a hill farm where we had chicken and pigs and cows and lots of corn and veggies. I wanted to preserve a little bit of the history and get back into it. I wanted to find a way to remind people that food doesn’t come from grocery stores, it comes from farms.”

Many respondents also described their motivations as a lifestyle decision. For our informants farming was a joyful activity that enhanced the quality of their lives. Some described farming as in terms of community-building, subsistence, homesteading, sustainable living, learning and making a difference. These rationales were also linked to ethical or political postures toward creating a more “livable community,” “repairing the land,” producing “good food,” practicing “sustainable farming,” and working in a way that were “beneficial to the earth.” Following these concerns, farmers also described their interest in farming as related to producing healthier foods that they and their community couldn’t access otherwise.

“I began farming to have healthier food for me and my family, and also to be able to put out good, chemical-free food for the public.”
These sentiments were balanced with economic rationales as well. However, it is crucial to recognize, as we describe below, the uneven incomes and returns from farming. Financial motivations for speciality crop production included the profitability of commercial operations, new market opportunities in rural areas, the generation of supplemental household income, paying a mortgage, saving money, supporting a spouse or parent, or the loss of a job.

“My wife had a crazy idea that she wanted to take honeybees up as a hobby. I did some research and discovered that it’s a marketplace that not filled. The sky’s the limit on income.”

However, as we describe below, economic motivations and entrepreneurial visions must be understood in the context of structural constraints from the difficulty of producing specialty food crops for local markets. Many of our informants started small with a garden or a few livestock and grew incrementally, experimenting with producing and marketing over the course of a few years. Many growers also referenced “learning” through participation in educational activities like the Master Gardener’s program and other Extension-based trainings. These experiences led farmers to scale up slowly, expanding their operation year to year. This accumulated experience translated into changing rationales from increased profit-making goals to also cases where producers decided to scale back to bring their farm work into better alignment with lifestyle goals and labor capacities.
Socio-Economic Outlook

Specialty food crop production in West Virginia operates at a very small scale on highly diversified farms. According to our study, the average farm size among Specialty Food Crop (SFC) producers is 92 acres with just 3.3 acres in crop production and 6.2 acres in pasture. Farmers in our study primarily produce vegetables (73%) while many also raise livestock (59%), produce some fruit (58%), and eggs (46%). Livestock are not considered as SFC, however many of the SFC producers maintain livestock on their farms. SFC producers estimate that 83% of their products go to the market, while 17% of their harvest is retained for household consumption.

Thirty-nine percent of all farmers had full-time off-farm employment.

Specialty food crop producers have different levels of experience and derive different levels of income from agriculture. Beginning farmers with five years or less of experience (34%) and farmers with less than 20 years of experience (54%) make up the majority of SFC producers. However, growers with more than 20 years experience (46%) tended to report higher incomes from farming. The statewide average annual revenue for all SFC producers was $31,505. However farm income was highly uneven. 76% percent of producers report $50,000 or less in gross revenue from farm sales. 49% of SFC producers report less than $10,000 per year and 31% of farmers bringing in less than $5,000 in gross revenue.

Specialty food crop production is a part-time farm activity for most producers. Most producers rely heavily on off-farm income. On average SFC farmers report that on-farm activities accounted for only 28% of their annual household income. Only 19% (1 in 5) of our informants self identified as full time farmers and derived all of their reported income from their farm. Among these producers their reported gross revenues were $40,933. Sixty-nine percent of farmers reported significant income from non-farm sources including off-farm employment, retirement income, spousal income, and other income (such as rental properties etc.) which also contributed to annual income. Thirty-nine percent of all farmers had full-time off-farm employment. 1 in 3 farmers (31%) reported retirement income and 1 in 5 reported that more than half of their annual income comes from retirement funds. Furthermore, 1 in 4 farmers (26%) reported spousal income. 26% of study participants were averse to sharing gross revenue figures for this study or were unable to accurately report their finances.

Specialty food crop production is managed largely by the farm owner and family labor. Only 25% of farmers hired labor throughout the year. Most relied upon personal or household labor to meet production and marketing demands. In most cases, farmers described their farm operation as too small and labor too costly to employ workers. The total labor employed by all study participants included 394 paid employees. However, one farm with gross revenues of $4.5 million employs 205 of those paid employees, which inflates the total number across the state. Few of these agricultural labor positions are full-time. SFC producers reported employing only 20 apprentices across the state. Farmers reported 45 total volunteers, and 10 AmeriCorps or WOOF (World Wide Opportunities on Organic Farms) participants. Notably, farmers often mentioned that they did not count these individuals as employees due to their limited work period or payment arrangement. All the AmeriCorps or WOOF members worked at the same farm, showing that this is a largely unutilized resource in the state.
According to the Agricultural Census, specialty food crop production is the primary agricultural activity in just 4% of all farms in West Virginia.

There is tremendous social and economic difference among specialty food crop producers.

According to our study the average farm size among specialty food crop producers is 92 acres with just 3.3 acres in specialty food crop production and 6.2 acres in pasture. Given the study results, we estimate that specialty food crop production makes up 1% or less of the total agricultural land in production in West Virginia.

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² This is a number that could be increased tremendously, as numerous community food partners have made it known that they want more farm-related internships and learning opportunities for students to get involved in agriculture. Non-cash ways of getting credit for apprentices’ work include high school or college credit for their efforts.
Specialty food crop producers are not a homogenous group. Working to advance specialty food crop production depends upon a deep understanding of who engages in this kind of farm production. We considered self-identification as full-time (n=89) or part-time (n=52) to be a key distinction between specialty food crop producers. Our research suggests further distinctions across income, market participation types, and more. However here we only report our findings based upon full and part-time engagement in farming.

**Full-timers**

- Self-defined full-time farmers of specialty food crops earned gross revenue of $37,613 from their farm annually.

- Only 28% of full-time farmers report farming as their only source of income. 72% of full-time farmers report other non-farm income.

- Full-time farmers on average reported that 35.2% of their total household income came from the farm. Retirement funds comprised 29.4% of full-timers reported income, with 8.4% coming from a spouse. Other sources – not listed in the survey – comprised the rest of the income.

- On average the farm size of our full-timers was 88.3 acres of which 40.4 acres were classified as in use on average. Of the 40.4 acres in use, 3.7 acres (9.2%) was devoted to specialty food crops (crops and orchard) and 7 acres (17.3%) was devoted to livestock.

- Full-timers unsurprisingly have the most paid employees, with 360 of the 394. However, one farm employs 205 of those paid employees, which inflates the total number across the state. Removing this farm from the total, we find that the average full time producer employs roughly 2.4 paid laborers.

Self-defined full-time farmers of specialty food crops earned gross revenue of $37,613 from their farm annually.
Part-timers

- Self defined part-time farmers earned $22,936 in gross revenue per year on average. 62% of part-timers reportedly earned non-farm income, while 38% reported no other income.

- Part-time farmers on average reported 18.2% of their total household income came from the farm. 100% of part-timers worked, owned their own business or derived income from rental properties. Retirement funds were a much lower percentage of their total household income, at only 5.6%. Spousal income was 13.8% of the total household income.

- The average farm size of part-timers was 107.2 acres, of which 24.3 acres were classified as in use on average. Of the 24.3 acres in use, 3.3 acres (13.5%) was devoted to specialty food crops (crops and orchard) and 9.6 acres (39.5%) was devoted to livestock.
- Part-timers only employed a total of 34 workers, or roughly 0.62 laborers per farm.

Market Participation by Specialty Food Crop Producers

Specialty food crop producers sell their harvests in a diverse range of markets. In most cases, producers are supplying multiple markets simultaneously and as a strategy to reduce market risk. In most cases farmers participated in two or more markets as a way to diversify sales and leverage benefits from different market channels. Participating in multiple farmers’ markets, pairing farmers’ markets, farm stand and restaurant sales, etc. enabled growers to “balance out” their sales across various outlets due to the varying characteristics of the clientele, transaction costs, potential prices, and sales volume. While diversifying market participation was time consuming, growers argued that it was vital to reduce sales risk. Such risk reduction strategies have become particularly critical as farmers’ markets become more saturated with growers without a commensurate increase in customers. This has led several of the growers to focus on selling produce across the border into Virginia, Maryland, Ohio, Pennsylvania, Kentucky and Washington, D.C.

### Market Participation by Specialty Food Crop Producers in West Virginia

<table>
<thead>
<tr>
<th>Market Type</th>
<th>#Participating Farmers</th>
<th>% of Producers</th>
<th>% of Sales (Average)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Farmers Market</td>
<td>102</td>
<td>72%</td>
<td>55%</td>
</tr>
<tr>
<td>Direct Sales</td>
<td>89</td>
<td>63%</td>
<td>43%</td>
</tr>
<tr>
<td>Wholesale</td>
<td>56</td>
<td>40%</td>
<td>28%</td>
</tr>
<tr>
<td>CSA</td>
<td>22</td>
<td>15%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Roughly 40% of producers sell to wholesale markets. There is considerable scope for growing this market however, as discussed in the barriers section, wholesale markets present considerable difficulties for growers.

### Wholesale Market Participation by Specialty Food Crop Producers in West Virginia

<table>
<thead>
<tr>
<th>Wholesale Type</th>
<th>Participating Farmers</th>
<th>% of Wholesale Producers</th>
<th>% of Sales (Average)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant</td>
<td>33</td>
<td>59%</td>
<td>17%</td>
</tr>
<tr>
<td>Grocer</td>
<td>20</td>
<td>35%</td>
<td>20%</td>
</tr>
<tr>
<td>Food Hub</td>
<td>18</td>
<td>32%</td>
<td>30%</td>
</tr>
<tr>
<td>Large Institution</td>
<td>16</td>
<td>28%</td>
<td>29%</td>
</tr>
</tbody>
</table>
When asked what markets are most profitable, producers ranked farmers’ markets highest and direct to consumer farm stand/delivery, including online sales, second. Selling to wholesalers was a distant third, while grocers specifically were ranked fourth. CSAs were ranked fifth in terms of profitability, and restaurants were sixth and last. The placing of restaurants last is a remarkable, as they were ranked the third most profitable market in the pilot study conducted in 2016.

- **Farmers’ Markets** were deemed the most profitable due to high volumes and brand-building capacity of direct sales. However, farmers also noted declining profitability from growing competition from other specialty crop producers, uneven income base of consumers, and the time-consuming nature of participating in multiple markets to ensure profitability. Moreover, farmers also noted the frustration of navigating the politics of market boards.

- **Farm stands** and other direct consumer marketing ranked the second most profitable as the customer base tends to be loyal, delivery can be more time efficient, and there are fewer transaction costs. However, it is also difficult to identify new clients and logistical demands gain in complexity as customer base grows.

- **Wholesale** (as a broad category) ranked third because of larger sales volumes and spending less time selling the product (as compared to an all-day farmers’ market).

- **Grocers** ranked fourth largely due to larger volumes. Producers added that their products reach more people at a grocery store as opposed to other market types. Much like wholesale overall, the larger volumes is both a blessing and a curse as many producers struggle to produce large enough volumes consistently without the prerequisite labor.

- **CSAs** ranked fifth in profitability largely due to the advance payment (as working capital) and reliability of market. However, farmers also noted the high labor costs, high quality demands, advance marketing requirements and consistent administrative demands.

- **Restaurants** ranked sixth. Farmers noted the wider profit margins in selling to restaurants versus other wholesaling. However, the consistent volumes and diverse mix of products was deemed to be a barrier to this market type. Farmers noted the difficulties of negotiating terms of sale including product types, volumes, qualities, deliveries and prices. Furthermore, restaurants were less consistent and tended to purchase only specific unique crops at specific times of the year.
## Farmer Assessment of Specialty Food Crop Markets in WV

<table>
<thead>
<tr>
<th>Market</th>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 Farmers’ Markets</td>
<td>• Most profitable&lt;br&gt;• Consistent&lt;br&gt;• Personal relationships with customers&lt;br&gt;• Large customer base&lt;br&gt;• Direct cash sales (no middlemen)</td>
<td>• Increasing competition from major retailers and new farmers&lt;br&gt;• Customer base and income level can vary for markets&lt;br&gt;• Time consuming&lt;br&gt;• Vendor boards can be too political&lt;br&gt;• Limited consumer base in WV</td>
</tr>
<tr>
<td>#2 Farm Stands/ Direct Delivery</td>
<td>• Direct sales model&lt;br&gt;• Maintain relationships with community and customers&lt;br&gt;• Deliveries are efficient use of time&lt;br&gt;• Don’t have to vend at a market all day&lt;br&gt;• Can vend on own terms without interference&lt;br&gt;• No nearby competition</td>
<td>• Difficult to attract/ grow business&lt;br&gt;• Logistically difficult as number of customers increase (deliveries)</td>
</tr>
<tr>
<td>#3 Wholesale (Hubs,Grocers,Institutions)</td>
<td>• High volume potential&lt;br&gt;• Reliable source of income&lt;br&gt;• Less labor intensive (don’t have to vend at a farmers’ market or participate in direct sales)&lt;br&gt;• Can reach wider group of customers</td>
<td>• Strict regulations (packaging/ processing, liability insurance)&lt;br&gt;• Loss of contact with consumers&lt;br&gt;• Food hubs can undercut weekend farmers markets&lt;br&gt;• Slimmer margins&lt;br&gt;• Competing on price with larger corporate agriculture&lt;br&gt;• Hard to manage relationships - difficult goals and views, coordination&lt;br&gt;• Food hubs can undercut weekend farmers markets</td>
</tr>
<tr>
<td>Market</td>
<td>Pros</td>
<td>Cons</td>
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<tr>
<td>-------------------------</td>
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</tbody>
</table>
| #4 CSA (Community Supported Agriculture Shares) | - Get paid in advance  
- Reliable source of income  
- Marketing through word-of-mouth | - High labor and marketing demands  
- High quality expectations  
- High administrative responsibilities (collecting money, distributing food, coordinating dropoffs/deliveries)  
- Retaining customers is difficult  
- Crop failure is a major threat |
| #5 Restaurants          | - Personal relationship with buyer  
- Margins better than other wholesale clients  
- High volume               | - Some chefs are hard to work with (unreliable or misleading)  
- Price negotiations are difficult  
- Keeping up with demand  
- Difficult to anticipate what restaurants will want in advance of harvest, only interested in specialized products  
- Growing competition |
Given that decision-making around market participation includes concerns about production risks and variable costs and revenues generated by different market mechanisms, we asked our informants to explain the barriers they faced to expanding their operations and improving viability. It is notable that 23% of producers said they perceived no production nor market barriers. Among those who did respond producers described:

- **Production Risks** including weather events, yields, labor-time, personal health, operating costs, technological needs and the need to diversify production and market participation simultaneously.

- **Logistical issues** including (reliable) transportation, value-adding infrastructure (packhouse, slaughterhouse, cold storage), farmers’ market scheduling, regulatory burden (certificates and permits), insurance costs and access to arable, adequate land.

- **Market risks** including rising competition and oversaturation of local food production for a “shrinking pie” of high income consumers within what is generally a low-income population. Growers repeatedly remarked that there are “not enough people” to buy local produce within WV and several full-time growers argued that part of the problem was part-time growers were driving up competition. Competition clauses also serve to protect markets from having too much of one product.

- **Interest, time and personal well-being** were also frequently referenced as major barriers to growth. Grower households are caught up in the double bind of needing off-farm employment to supplement income and struggling with the high costs of production. These growers described reaching a breaking point where expanding production and diversifying markets simply was not “worth it” to them. In other words, the returns did not warrant expending additional effort or taking on additional risk.

In an effort to understand farm viability and market participation we conducted an analysis of economic difference between producers at different thresholds of revenue. Revenue figures not only provide insight on potential income from production, but also the level of commitment to specialty food crop production among our study participants. While still in its preliminary stages we have sought to characterize the scale of these growers and their orientation toward production and market. The five categories we have established are: commercial producer (> $100K); entrepreneurial producer ($50-99K), small-scale producer ($25-49K), micro-scale producer ($10-24K), emerging producer ($1-9K). In the following we offer an analysis of each of these five producer categories.
Commercial Producers

Barriers to a Viable Farm Enterprise
Financial barriers and labor barriers are the major impediments to a viable farm enterprise as identified by producers grossing >$100K annually. Paying for labor falls under both categories, and this has the carry-over effect of limiting production capabilities as demonstrated in the previous response above. Paying off a mortgage is important, as debt serves as a motivator for farming. Intriguingly, a pair of respondents list no barriers to ensuring a viable farm, noting that everything they produce sells and that “if you want to work you'll experience success.” This response places all outcomes on the shoulders of the individual farmer without acknowledging structural effects on farming. Lastly, having a “good market” was indicated as important to a viable farm, but what this looks like is unclear. It can be inferred from other comments that good markets have a certain amount of profit-margin tied to them that enable the hiring and maintenance of their labor force.

Keys to Success
Market opportunities and business planning were identified as the keys to a successful farm enterprise. One respondent notes that a farmer has to “be a business person (you can’t just be a farmer).” This is crucial to understanding motivations. To understand responses to market demand, farmers have to manage their capital, land and labor. Agricultural work itself is but one aspect of the business.

What to Produce?
Market demand and production capabilities are the major factors for choosing what to produce each year. Only one respondent referenced personal preference. Another respondent did mention that they produce the same products every year and this could be a family dynamic, though not explicitly categorized as so. Therefore, they are motivated by market demands and are willing to respond to it. Production capabilities have some impact, but many of these growers are responding to specific market demands such as honey and fruit.
Training
Producers grossing >$100K annually have their hands busy with farm-related training. Good Agricultural Practices (GAP) is the most common, but this is usually in conjunction with other types of training including master gardener classes and going to conferences or universities for assistance. Perhaps surprisingly, only one producer noted pesticide training. Is that producer the only one that uses them? Or is this knowledge that was passed down through informal kinship networks for other producers? Overall, these producers heavily invest in formalized training for their farms.

Producers list a host of market barriers they are facing. Lack of adequate transportation and distribution systems, including the ability to pay for them, hinders the movement of food.

Market Profitability
Farmers’ Markets are by far the most profitable according to these >$100K farmers. Great sales’ volume, steady traffic, higher retail prices and multiple locations are all listed as benefits. Direct sales, wholesale and a food hub make one appearance each. Wholesale and food hubs are also listed for great volume. Direct sales is the only type to not mention volume. Clearly, these producers are producing enough volume to make these markets lucrative. What makes these farmers’ markets so incredibly profitable that others are not or are not able to do?

Non-Participation
Time, labor and production difficulties were all listed as reasons for not participating in the markets that these >$100K farmers are not producing for. Production capacity was the most cited reason, with time second. These reasons make sense because production is made possible through solving labor and time issues. Scaling up is important to these producers, however time and labor issues are vexing them, even though they are able to bring in >$100K in revenue annually.

Barriers to Market Participation
Producers list a host of market barriers they are facing. Lack of adequate, reliable transportation and distribution systems, including the ability to pay for them, hinders the movement of food. This may also influence the ability to access new markets such as restaurants and stores. Perhaps this one respondent has the answer: “making friends with people that have the power.” But even that has its issues - schools and producers are unable to get along.

Barriers to participation in farmer’s markets
Competition, particularly within farmers’ markets, is a major barrier identified by farmers grossing>$100K annually. Notably, this is competition against other specialty food crop producers and not against larger corporate agriculture. Additionally, location and distance were also identified as major barriers, though for different reasons. This includes a mileage requirement - a social construction that limits who can come to a particular market based off of how close they produce
relative to that market - to transportation and land access issues. Regulations were mentioned by one producer; however this was not elaborated upon by said producer.

**Barriers to participation in food hubs**
Knowing a steady, standard order, as this facilitates proper production. Another producer alluded to this in a comment noting that “demand and availability don’t always match,” which could be grouped with not knowing a steady or standard order. Lastly, availability and delivery were identified as barriers, which again goes back to the question of production decisions but also notes a transportation logistical issue or access issue.

**Barriers to participation in restaurants**
Once again, there is not one clear barrier identified by producers grossing >$100K. Again, we see delivery listed as a barrier - here there is an emphasis on the cost, which is prohibitive. The concern with distribution ties back into concerns with delivery, as this is part of the logistical process of moving product. “Having the right products” indicates that there is a miscommunication between producers and restaurants over what products to serve versus demand. Lastly, one respondent noted how weather affects tourism and thereby food demand.

**Barriers to participation in grocery stores**
Producers grossing >$100K for grocers are mostly concerned with competition. However, unlike farmers’ markets where this competition is against fellow specialty food crop producers, this competition is against larger corporate agriculture businesses whose economy of scale allows for cheaper prices than is feasible for these producers. This is concerning for specialty food crop producers because their market share is being hampered by their inability to produce at a scale where the relative production cost is low enough to be competitive.

**Barriers to participation in CSAs**
Retaining customers is the major barrier for producers grossing >$100K who run a CSA program. Interlocked with this is concerns over crop failure. It makes sense that these two concerns are co-dependent, as the CSA format requires trust that farmers will produce a certain amount each week after customers pay a large upfront payment. Without that guarantee of weekly production, it makes it difficult for customers to rely upon the farmer and may turn them to another source.

**Barriers to participation in large institutions**
The logistics of delivery is identified as a major barrier again. This is a cross-cutting concern across market types. Additionally, this is the first time that Good Agricultural Practices (GAP) is noted to be a market barrier. There also appears to be a strained relationship between at least one producer and the larger institutions that they sell to, as there is a mention that “they set the prices.” This shows that there is a disconnect between how much the larger institutions can or are willing to pay, and the ability for the producer to produce enough at a proper economy of scale to match that payment. The power balance is also unequal between the partners.

**Desired Market**
The major market that the >$100K farmers are looking to produce for is restaurants. This is interesting because restaurants came in sixth statewide as the most profitable market. Perhaps this is the next big opportunity? On the flip side, three of the respondents are completely uninterested in accessing future markets.
Entrepreneurial Producers

Barriers to a Viable Farm Enterprise
Market access and other financial issues are the most listed impediments to a viable farm enterprise for producers bringing in $50-99K annually in revenue. Start-up capital is necessary to get the business off the ground, but access to markets is the key next step. Insurance is another factor that provides producers security in case the second most cited barrier occurs: inclement weather and pests. These can be game changers for specialty food crop producers. Land access is also a major concern, and this relates back to how people are coming on to their land. Those with familial ties have an advantage over those that do not, often having the ability to rent or purchase within family perhaps below market price. Lastly, having a customer base that is consistent and able to afford their products is crucial to success in farming.

Keys to Success
A successful farm enterprise is heavily dependent on strong community support, i.e. consistent, reliable customers to purchase producers’ products. Coupled with this is personal efforts, as farmers noted that “dedication, patience, persistence” and “hard work” are necessary traits for success. Labor and market access were only mentioned by one producer (same producer for both comments). One producer does speak to an important issue that was relayed in the >$100K revenue group, and that is the concern about business planning. This producer struggles with tracking finances, even though they were quick to point out that they are educated (holding a college degree). Financial literacy is not a given, and it is a practice. Lastly, the same producer notes a disconnect between themselves and butchers who are not cutting meats to the producers’ standards, and this is causing a strain on the producer. This points to a variable that the producer has little to no control over.
What to produce?
A vast majority of producers responded that market demand was the biggest factor on deciding what to produce this year. This is noteworthy because while people may not have stated a financial reason to get involved in farming there is a desire to “do it right” or to be efficient about it so it is not a waste of time. One response listed heritage, experimental and lifestyle factors as important to deciding what to produce each year. Surveys appear to be most helpful for choosing experimental products. Lastly, one producer was passionate about respecting their land by not using chemicals, and also about fair wages. This demonstrates that political beliefs have an impact on what farmers choose to produce.

Training
Producers in the $50-99K revenue bracket are vociferous consumers of formal training and certification classes. Conferences such as Small Farmers Conference, PASA (Pennsylvania Association for Sustainable Agriculture), and Appalachian Grazing are popular. GAP (Good Agricultural Practices) is another popular program, with three respondents noting their participation. Trout-specific processing licenses as well as DNR fish sales licenses were also cited. One producer did seek to address the business planning dearth by attending marketing classes, accounting through colleges and extension and business planning. It would be worthwhile to see how many extension programs offer financial literacy, and if there is a demand for this type of course by farmers. Lastly, we get a distinction between formal and informal learning networks as one producer says that they have been “learning all my life.” This comment alludes to a trial-by-error approach to farming that involves direct, lifetime experience over seeking out professional training. How many other farmers learned via doing, instead of through formal channels? Does this have an impact on financial success in farming?

Market Profitability
Farmers’ Markets are the most profitable markets according to this group of producers. Farmers note that they “receive the full price” for their products, that “folks are willing to pay a little bit more for things,” and interest in local foods are major keys for farmers’ market success. CSAs are also surprisingly highly ranked, with three respondents saying this was their most profitable market. “Upfront investment,” “least amount of time marketing,” and “only pick what is sold, not speculative” were reasons listed for CSA profitability. Lastly, direct sales. Notably, all three market types depend on a close relationship between producers and consumers without middlemen such as grocers, restaurants or wholesalers. This signifies that people are willing to pay a premium for that relationship that they may not get in another market type.

Non-Participation
Production and cost of business were the most popular responses for why producers are not producing for the markets that they do not participate in. Production concerns include “capacity,” “keeping up with demand” and having to have “enough produce to make it worth it.” This demonstrates that infrastructurally it may not be feasible, but there are also labor concerns that could alleviate this. Costs are also concerning, particularly around price-point. The economies of scale for these speciality food crop producers is not at the level that larger agricultural producers are, thus there is a competition barrier. One producer did highlight the amount of risk involved in CSAs. Interestingly, this producer said that “agriculture is not a promissory thing.”
Barriers to Market Participation

Production, marketing and pricing are the three most cited market barriers for this group of producers. Production is multi-variable, with concerns over not keeping up with demand, but also desiring to scale up. Part of scaling up involves reaching a competitive price-point that opens more opportunities for these producers. Legal barriers, particularly around crossing state borders that are inconsistent in agricultural regulations is a major issue for all counties bordering other states. This is perhaps most urgent in the Eastern Panhandle, which faces WV laws, Maryland laws and Washington, D.C. laws. Lastly, marketing is a major issue because if potential consumers do not know who you are it makes it tough for them to buy your products.

Only two producers in the $50-99.9K revenue bracket sell to grocers. Both producers noted that there is inconsistency in purchases by groceries, which makes it difficult for the producer to have a reliable income sources.

Barriers to participation in farmer’s markets

Producers who gross between $50-99K identified a number of barriers for vending at farmers’ markets. Many of these are related. Regulations and relationships are related due to communication and paperwork, and who controls these processes. An “old guard” can have tremendous influence on how easy paperwork and communication is, and can serve as a form of protectionism. Competition is also noted, which similar to the >$100K producers the concern is with the number of other specialty food crop producers as well as what is produced. This can be tied back to the question of communication: is there a way to work together to not cut into each others’ profits? Should they institute a mileage requirement? Who gets to make such a decision? Lastly, there are general concerns around the cost of business, time and consistency. However, without context is difficult to ascertain what these producers meant.

Barriers to participation in food hubs

Only one producer sells to a food hub within this revenue bracket, and they identified nothing as a barrier to working with food hubs. It is unknown why there are not more producers working with food hubs, or why this producer stated that there are no barriers.

Barriers to participation in restaurants

There is a much clearer picture of the barriers producers grossing $50-99K are facing in regard to working with restaurants - competition, relationships and product rule. Pricing is mostly due to economies of scale and the specialty crop producers being unable to lower their prices. Relationships
between chefs and farmers is crucial, as the chefs have major decision making power over what is being made and where it is sourced. Variety and volume are also barriers, as restaurants need to refresh their menus but also need particular amounts. Again, this relates to the question of pricing as economies of scale are relevant for how much can be produced and sold.

**Barriers to participation in grocery stores**
Only two producers in the $50-99.9K revenue bracket sell to grocers. Both producers noted that there is inconsistency in purchases by groceries, which makes it difficult for the producer to have a reliable income sources. The meat producer also highlights how differences in state laws produces a barrier in that it eliminates markets because they are discrepancies between the laws. This raises an interesting dilemma for all border counties through the state, and the country as a whole. How do we overcome or streamline these differences?

**Barriers to participation in CSAs**
Costs and relationships are major barriers for producers grossing $50-99K that participate in CSAs. This is unsurprising, as the >$100K grossing revenue bracket shared similar concerns. This relates back to the issue of large upfront costs with weekly production quotas that must be met. However, a new barrier is access to customers - perhaps a marketing issue? Is word of mouth the best method of reaching new clients? Lastly, there is a note that CSAs take “a lot of time.” It is unclear how CSAs take more time than other markets, but it can be inferred that this is connected to the weekly harvesting and logistical issues connected to a CSA.

**Barriers to participation in large institutions**
Only one producer in the $50-99K revenue bracket listed that they sold to large institutions. They did not identify any barriers with selling to large institutions, therefore there is nothing to infer from this statement.

**Desired Market**
Producers grossing $50-99K are interested in accessing multiple different market types in the future. This includes wholesale, large institutions and restaurants. A reason for getting into large institutions is that a producer would be producing on a larger scale, which would help with the price-point concern listed by other producers. Perhaps surprisingly, a significant number of participants expressed no desire to access additional or other markets in the future. This is possibly related to the opening motivations that highlighted that most of the producers did not begin farming for a financial reason, but they are willing to at least be efficient about their time and abilities.
Barriers to a Viable Farm Enterprise
Financial issues are the major impediment to a viable farm for producers grossing $25-49K annually. There are major concerns about customer base with sufficient income to purchase. Other concerns include start-up funds, turning a profit after overhead costs, and competition with other producers “who are just using it as a tax write off.” Weather and regulations are also noted as barriers but are not elaborated upon. Cost concerns focus on labor and processing equipment. Lastly, there appears to be a land access issue but it was not elaborated upon.

Keys to Success
Unlike in the previous revenue brackets for the >$100K and the $50-99K, access to cheaper and the proper equipment was cited as important to having a successful farm. Access to equipment is tied to production, even though the pair that listed production concerns did not note equipment. To have a quality product and proper soil, a certain base level of equipment is necessary. Perhaps those farmers who did not refer to equipment in their production comments already have access to the right equipment, and therefore do not list it as a concern. Labor is important, as one producer states the need for a “strong work ethic the same as the owner.” Do laborers feel that they are not getting enough share or benefit from farming to make it worthwhile? Are the wages enough to help inspire that work ethic? Financial concerns are also worth looking at in greater depth, as capital is necessary for equipment and labor. Lastly, having a market for the products is crucial because without a market the production costs are not feasible.
What to produce?
Market demand and family were the most commonly cited factors in choosing what to produce each year. Market demands include analyzing what sold well before, but also involves paying attention to supply and demand and listening to what customers want. Family dynamics revolve around producing what the family wants to grow or eat. Tradition and what they like is a key determinant. Other producers noted that a wide variety of products is important, and part of this is taking risks through experimenting with new products such as mushrooms.

Training
We see a continuing trend of great interest in formalized learning and training opportunities for farmers. Conferences and university assistance are popular, as is GAP training. Food Handlers, Food Safety, Pesticide applicator, Senior Voucher, and Annie’s Program were all listed as other training opportunities. Many of the producers participated in multiple programs, highlighting how the educational component of farming is important to them. Two producers did make a point that they did not do any training. One elaborated by noting that they are “self-taught” but had generations of family that farmed before them. Therefore, there was some informal training that occurred but might not be counted as training due to societal definitions for what constitutes training or not.

Market Profitability
Farmers’ Markets and Direct Sales were by far the most common response in regard to most profitable market. Farmers’ Markets are popular because of “regular customer base” and “bigger customer base.” Direct sales are popular because they “take[s] less time.” It is interesting that grocers and restaurants are listed as most popular, because price-point considerations are often complained about, but in these instances the larger amounts of product necessary were deemed more profitable. Farm-to-school was a surprise entry, mostly because so few specialty crop producers are in this market.

Non-Participation
Time and production capabilities are cited most often as the reasons why producers are not producing for the markets that they do not participate in. Production is limited by volume and scale, again impacting price-point capabilities. There is also a complaint about seasonality of products being a factor that limits market participation. However, in other cases it was geared towards the farm-to-school market and not in general. Regulations and cost of doing business are also concerns that impact production capabilities. The regulations issue mostly stems from a disconnect between producers and wholesalers who are looking for a specific type of product.

Barriers to Market Participation
Production capabilities and customer base were the most commonly listed market barriers. Too small of a customer base was the entire discussion on customers. Some of this was directed anger towards mail-order boxes, which they deemed limit knowledge and choice of local foods. Small markets was also a concern. Production again was focused on volume and pricing, but also on processing and slaughter facilities that are really far away and expensive. Advertising, time, and sexism were a couple of the other barriers identified. The sexism comment is noteworthy because it is the only comment that explicitly mentions gender out of the entire survey. Why is gender not discussed more? Lastly, regulations around GAP and ambiguous “legal barriers” are deemed to hold up market access.
**Barriers to participation in farmer’s markets**
The $25-49K revenue bracket is the first to say that there are no barriers to vending at farmers’ markets. In fact, half the group felt this was accurate. The other barriers identified appear minor, as the context of the quotes demonstrate. Matter-of-factly “making sure you have F.M. license” and “eggs - need egg license.” “Certifications or else fined by Health Department.” “Nothing illegal.” “As long as you produce all your stuff...paperwork done on time...contact the people you’re supposed to...won’t have problems.” These barriers have an implicit undertone that this is just part of the process, not really barriers. Lastly, the number of speciality food crop producers competing with each other is listed as a barrier.

**Barriers to participation in food hubs**
Both producers working with food hubs highlighted relationships are the only barriers to food hubs, but in different ways. The first is the producer to seller relationship. This relationship was not elaborated upon, but is noteworthy. Perhaps more intriguing is the cooperation between growers around price setting and quality control. This demonstrates a leveling of the market to enable all growers to benefit from the food hub. It would be worth contacting this group to have them elucidate on how this process works, and why they think it works.

**Barriers to participation in restaurants**
Product is the major barrier to working with restaurants. Particularly, it is having a consistent amount of product. Part of this is connected to relationships between farmers and the restaurants to ensure that correct amounts are produced when needed.

**Barriers to participation in grocery stores**
Producers grossing $25-49.9K identified regulations as the major barrier to selling to grocers. These regulations include communication around health department rules, but also around licensing issues. How difficult is obtaining the proper licensing? And what health department rules are confusing? Lastly, competition from larger corporate agriculture is mentioned as a barrier. This is different from the competition at farmers’ markets that is between speciality crop producers; this signifies a jump in scale.

**Barriers to participation in CSAs**
Intriguingly, three of the four producers operating CSAs listed no barriers to this market type. The one response had a caveat noting that this was their first year doing a CSA, therefore it is possible that they might encounter barriers later on. Time was the only other response, and it was just in general needing more time. Communication perhaps plays a role in this time management, as the producer notes needing to be more prepared ahead of time for harvesting.

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**We see a continuing trend of great interest in formalized learning and training opportunities for farmers.**
Barriers to participation in large institutions
There are a number of barriers identified by the trio of producers selling to large institutions. First, relationships are again a major barrier. This is miscommunication between the cooks and the producer, which snare the organizational process. Competition with large corporate agriculture is also identified as a barrier, which points to issues with economies of scale. The seasonal production barrier is perhaps more of an infrastructural issue, as having a high tunnel would enable this producer to produce vegetables during the school year.

Desired Market
Most producers grossing $25-49K in annual revenue are not interested in accessing other markets in the future. Some of these are qualified but noting that they are doing well and also that people have been “encouraging him to sell online.” Most respondents gave an outright no. Schools were the second most popular choice, but there was little elaboration on why producers would pursue that relationship. Similar case with hospitals. Wholesale and direct sales got one mention each. Wholesale meat sales is potentially a profitable market. The direct sales comment shows a desire for her own store, but this is limited by a lack of overhead capital. One product did not list a particular market, but stated that they would be looking into honey and beekeeping, as well as beets by the fall.

Micro-scale Producers

Barriers to a Viable Farm Enterprise
Producers grossing $10-24K annually identified several barriers to a viable farm enterprise. Financial barriers were the most widely reported; this ranges from concerns over insurance to insufficient income to possibly not being able to afford their equipment. Weather and pests, as well as labor concerns, were tied for the second most common response. Deer, disease and insects are particularly worrisome. A lack of finances plays a key role in the labor question, as producers emphasize the fact that they are their only employee. In one instance, this is due to age and health concerns. One farmer also stated that they do not have the ability to go full-time without any employees. Markets were noteworthy in that they highlighted the role of self-provisioning in the state, and interestingly one producer pointed to a “strong culture of sharing, community and self-provisioning” in light of lack of industry. This demonstrates that the culture is there for organizing farmers, but will anyone take the next step? Lastly, one producer states a lack of resources in WV for poultry producers. This includes “no poultry processors” and the expense of poultry farming.

Keys to Success
Government support, regulations and resources are the three things that specialty food crop producers said they needed for a successful farm. These producers are upset by a perceived difference in how different producers are treated across the state. This includes not having access to “volunteers or government equal to those given to agribusiness farms,” and seeking “reimbursement like how meat producers have” if he loses one of his hives. Less specifically, these producers note that the state of WV is in a particularly economic crisis which extends to their ability to be successful. Resources could be grouped in with government support and regulation, as these producers need fencing,
water lines and “more options for animal processing.” That seems to be a major dearth in the state, something all of the meat producers are mentioning as hampering them. Intriguingly, a pair of producers point out uneducated customers as a barrier to their success. Is it a lack of education, miseducation or a criticism for being too poor to afford specialty food crop products? Production and market concerns were also listed, including desires to scale up, to fight disease more efficiently and to have more customers.

What to produce?
Market/ demand was by far the most influential reason behind choosing what to produce each year. Farmers are keen to producing what customers request, as well as seeking out niche products. One producer has a political bent by stressing being GMO free as something that makes their products better than others’ products. A handful of farmers noted being limited by production capacity or lifestyle, and this was mostly due to the niche products they offer: wine, honey, blueberries and turkeys. Family decisions were the first response for a pair of producers; this is not common though. Lastly, experimentation and variety were deemed important for attracting new customers as well as providing opportunities for diversity that rural consumers may not always have access to.
Training
A majority of producers stated that they attended formal training either at a university, at a conference or through agricultural extension. These include high/low tunnel classes, the WV Small Farm Conference, Senior Vouchers through extension, beekeeper classes, poultry classes, sheep shearing classes and a Master’s Degree in Animal Science. Overall, a fairly educated group. Notably, all of these producers attended multiple classes or conferences and continue to go. This indicates a commitment to learning. Other training or learning opportunities include Annie’s Project, which seeks to “strengthen women’s roles in modern farm enterprise.” It is offered in 33 states (https://www.anniesproject.org/). State programs and health seminars were also mentioned, as were pesticide classes. It is unknown if these programs are tied to a university or extension, though it is highly probable. The most ambiguous response received only said “training for the market, no training for garden” which perhaps alludes to business planning of some sort but it is unclear. Only one producer said that they did not attend any sort of training related to their farm.

Market Profitability
Producers identified farmers’ markets as the most profitable market type by a large margin. Reasons for farmers’ markets being so valuable include proximity to their own homes, how easy it is for consumers to drop in, good traffic, higher retail prices and the ability for farmers and consumers to have a relationship. One perplexing response noted that “farmers’ markets are good but sometimes have a hard time selling.” It is unclear what makes this market or market hard to sell at sometimes, and not all the time as the producer did not elaborate. Direct sales were the second most popular, but a distant second to farmers’ markets. Direct sales are the lifeblood of one producer who appears highly dependent on “3 months bump with Upick.” There is also a mail-order egg producer, who states they can charge more than the local economy “will support.” Community-supported beef, though not listed as an market option in our survey, is one producer’s best market. It would be worthwhile exploring how this system works, and how closely aligned it is to a CSA program comprising vegetables. Lastly, two producers listed wholesale sales as their most profitable markets. Johnnies Fresh Meat Market is unsurprising, as it is located in the Capitol Market’s main building in Charleston and is a heavily trafficked area. The other is a wine shop.

Non-Participation
Time, production costs and regulations are the three major reasons why these producers are not producing for markets that they do not participate in. Two respondents stated that working a full-time job in addition to farming is taxing. Another disclosed the stress and anxiety tied to farmers’ markets, and opts out because of that. The last one said that other opportunities such as opening a bistro were better, and they now have time freed up to visit their grandchildren. All these answers show that farming is not the first concern for these producers, and their mental health, family and other job obligations have much impact on their ability to sell at different markets. Wholesale regulations are frustrating for a pair of producers, as they do not feel like fighting over the regulations is worth their time. Another notes that other markets “can not do lamb,” which is clearly a barrier. How can that be resolved? Production costs are another difficulty associated with wholesale, as these specialty crop producers are having trouble meeting competitive price points. One producer stated not having enough help, which is not uncommon as it hinders how much can be managed by one person. Not knowing how to run a CSA was also listed, including the claim of not being smart enough to run one. Other markets are more attractive, either because of higher prices or because markets do not exist
Barriers to Market Participation
Producers identified a large number of market barriers. Politics regarding interpersonal relationships was the most cited. This includes competition amongst specialty food crop producers, concerns over how certain markets handle pricing, and the inability to pay living wages and make money. It appears that newcomers are not always welcome, and are viewed as threats to establishment figures. Additionally, general time constraints were listed by two producers. Pricing concerns are prevalent, as producers feel unable to sell their products for what they think they are worth, and and consumers are willing to buy “fake” over “real”. This is connected to several structural issues identified, including lack of population, a downturn in the economy and a disconnect between high prices and comparatively low incomes. Maybe the “fake” food is all that is financially feasible, and it is not an ethical decision like this producer makes it out to be. Marketing and market access are also worrisome, as producers noted how they either do not get enough advertising or they face logistical problems. This is tied to market access, and not having a reliable customer base. Lastly, as always, production and labor are barriers. As usual this is because producers are unable to produce enough to sell enough to hire labor to help them hire to get over the hump of scaling up.

Barriers to participation in farmer’s markets
Regulations, costs and competition are the three major barriers identified by the producers grossing $10-24K in revenue. Health department regulations and permits are problematic for both costs and amount of time for filling out paperwork. Costs are prohibitive because of production but also traveling to the markets. There is not enough money coming in to make the production costs worth it. Competition once again is intense - mostly this is due to markets being “territorial.” These markets have voting processes that limit competitors from participating. There are also issues with ethics, particularly around speech and decision making. Two vendors did not identify barriers, but the one mentioned that owning the farm was crucial. How many farmers statewide do not own their farms? How much does rent hinder their production? The other farmer noted that this was a hobby, not a living. Is this a retiree? Or a part-timer? What attracts them to farmers’ markets?

Barriers to participation in food hubs
The only producer working with food hubs identified no barriers, but was sure to highlight that “really good” communication is key to making this relationship function well.

Barriers to participation in restaurants
The four producers working with restaurants listed a host of barriers. Costs and competition are interrelated, as commercial food prices have an impact on smaller specialty crop producers. Delivery is once again mentioned as a barrier, because transporting the product falls on the shoulders of the producer. Product barriers were the most prevalent. This is due to desires for particular types of products as well as particular volumes.

Barriers to participation in grocery stores
Only one producer is selling to a grocer, and the response is indicative of a flaw in our survey. The response states “already answered in food hub response.” However, there is only one response under
food hubs and selling to grocers is not talked about. Good communication is referenced; perhaps that is what this response is alluding to. It is also possible that our attempt to distinguish barriers for different market types is not a distinction made by producers in their minds.

**Barriers to participation in CSAs**
The only producer grossing $10-24K operating a CSA program did not list any barriers for operating the CSA, and therefore it is impossible to infer further information about barriers for this market type.

**Barriers to participation in large institutions**
Only one producer grossing $10-24K is selling to large institutions. Their response refers to market price as the barrier. However, by noting that they “broke even there” the last time they sold to the large institutions, an argument can be made for the impact that the economy of scale has on the producer’s ability to make money off this endeavor.

**Desired Market**
A plurality of producers grossing $10-24K in annual revenue state that they do not wish to access any markets in the futures. Reasons include being comfortable where they currently are and putting off the decision until retirement. One producer is interested in joining or starting a food hub. Two producers cited interest in doing a CSA, but one noted uncertainty over the process. Two other producers would like to explore restaurants because of the premiums, but this is also limited by the need for large quantities. One producer wants to get involved with grocers, and another with large institutions. A stalled process in negotiations is holding up the sole farm-to-school producer, and again this is connected to the importance of relationships, production capacity and the ability to cooperate. The potential grocer supplier is not a fan of “the red tape” of selling to grocery stores, and this make prevent that individual from exploring that market. Lastly, one producer does want to access other markets but they only gave locations not specific market types.
Emerging Producers

Barriers to a Viable Farm Enterprise
A plurality of participants grossing <$10K in annual revenue stated that weather and pests were the major barriers to a viable farm enterprise. Deer, bugs, climate change and the seasons were all espoused as problematic. Labor was the second most cited barrier. Labor concerns focused on both the producer themselves as well as the seeming inability to secure “good employees.” Some noted age and physical health as impactful on their personal labor. “Too many gray areas” in state laws and the expensiveness of organic certification were listed as barriers too. The third most cited barrier is markets and marketing, as producers here listed troubles with advertising and getting customers to their markets. Financial concerns were only cited by one producer lamenting the lack of finances. Resources were mentioned once in regard to inadequate slaughter facilities and increasing input costs. Land came up twice - once for the amount of land available to farm on, and the other about no access to flat land to farm on. The final producer did not engage with the question, simply saying that he was comfortable where he was.

Keys to Success
Producers grossing $10K or less annually had a wide variety of things needed for a successful farm enterprise. Infrastructure is one of the major keys, with multiple producers desiring to have a high tunnel and a call for a closer slaughter facility. Market/ sales was another popular answer, and is was geared towards needing to have access to markets, being able to advertise, close proximity to markets, and having a quality product or products. Good weather with “steady rain” and “ample sunshine.” Four producers cited good weather as important. Land and labor had three responses each. Land factors included good soil, cleared space and just more space for laboring. Labor factors included having a family onboard with the plan, access to reliable labor and bemoaning the fact that he is on his own. Three participants highlighted personal efforts as necessary. Continuity, “lots of
luck” and a feeling that the farm is successful and worth their time were part of this discussion. Three producers called for more time and money, whereas four others said nothing was necessary. Those who stated nothing seemed to be talking about themselves for the most part, while all the other responses were either more general or included what they need as well. Only one response talked about resources such as access to education, promotions for markets and “state interventions to build deer fences.” This was not followed up so we are left unsure what the last statement was referring to.

What to produce?
Family decision, market/demand and production capability are the three most cited factors in deciding what to produce each year. Family decisions include what they like to eat, what the spouse or children like, and personal preference. Market/ demand includes looking at past trends, analyzing profitability margins and getting feedback from consumers. Production capabilities include scaling up, proper usage of land, getting tax breaks for being a producer and being limited to a niche product such as fish or honey. Niche products can also be influential in determining a particular lifestyle that ensures that there will not be much variability year-to-year. Such products are honey, wine and maple syrup. Other producers are able to be experimental, and so choose to utilize different options. Variety is listed as an important thing by only two producers, and only one mentions labor explicitly and that is due to an accident that affected his health. Two producers were ambiguous with the question, citing “whatever I consider a market to be” and “interest.”

Training
A large number of producers took part in some type of farm-related training or certification. Workshops, conferences, university-related and extension services were by far the most popular. Many of these participants attended multiple events. However, the second largest subgroup said that they had not done any training at all. One producer did note that “they had something last year I missed.” GAP, Senior Voucher and Master Gardening trainings each only had a handful of participants for this revenue bracket. They did often combine this training with one of the other types of trainings, such as going to a conference or workshop, or learning to do Senior Vouchers and the Master Gardener program. A smaller group pointed to their food handling certifications or health department classes for selling their products as part of their training. Three producers had more informal trainings, citing learning on an organic farm in the past, being “self-taught” or going to a one-off FFA event. It is evident that a large number of producers are doing farm-related training and getting certifications, and they are often doing multiple trainings and not simply a singular event. It would be worth exploring if the large “no” group had done informal training and not mentioned it or truly did not do any training whatsoever.

Market Profitability
The trend throughout all of the profiles holds true: farmers’ markets are considered the most profitable market by the plurality of producers. Reasons for saying so include higher traffic, public exposure and higher retail prices. Notably, a significant number of producers stated that they only sell at farmers’ markets. This skews the data because to answer the question they only have one choice of answer; it is possible that the number for farmers’ markets is higher than it should be but overall farmers’ markets are most cited as the most profitable market type. Also holding true is that direct sale markets are the second most profitable market in the eyes of the producers. Word of mouth and lower overhead costs of moving product were listed benefits of this market type. Food hubs, CSAs,
grocers and restaurants had 1-3 producers each say that that was the most profitable market type. A couple of the food hub producers sell to the Wild Ramp in Huntington and note that it is time efficient and has set prices as benefits. One producer said that all their markets are the same; reading through the statement appears to allude to these being farmers’ markets but that is not confirmed. Lastly, four producers cited an unknown market type. One stated that they have never sold at a market (perhaps this is confusion regarding the question being all manners of selling?) and another said none “because there’s just not enough people supporting farmer’s markets.” That is a contestable phrase, as a major number of producers said that farmers’ markets are the most profitable. The third respondent referred to bazaars and selling to the Mountain People’s Co-op which can be inferred as direct sales but again this is unconfirmed. The final producer said “both are the same” but did not list the market type therefore we do not know which two they are referring to.

**Non-Participation**

Time and production capacities and costs are the major reasons for why producers do not produce for the markets that they do not participate in. Time concerns included not having enough time to expand to considering it a waste of time sitting at a farmers’ market. Working either full-time or part-time also has an impact on time available for farming. Production capacities and costs include not producing enough volume mostly, but also noting how difficult it is to run a small business. Other markets are not accessible perhaps due to cooperation concerns or because of location. Labor concerns were related to time available to farm due to other jobs. One producer noted a dearth of knowledge, and another cited regulatory issues such as GAP training. A rather large cohort just has not explored other markets, saying that they are not ready to expand or don’t have an interest in doing so. Miscellaneous responses included that they are selling all their product currently, noting that farmers’ markets are tax exempt, “doesn’t like driving,” “response is slow”, and liking talking with community members. One person simply said that the “Greenbrier is much simpler.”

**Barriers to Market Participation**

Producers listed several market barriers that they are facing. The most cited concerns regarded production and labor. This includes not having the right equipment, growing older and not producing enough product. Marketing concerns were the second most cited, and this includes
better coordinating days and times, getting more customers and getting more vendors. A few producers complained about “uneducated buyers” but this is tied to broader structural concerns around socio-economic situations. One producer noted that they sell a specialty product and are having a hard time obtaining market access. Relationships are another major concern, as a couple of producers said that the political situations at markets were a hindrance. Someone else said pricing was a concern. There is one grouping of “misfit” comments. These range from “haven’t gotten into it yet” to disparaging the “computerization of everything.” Another producer commented on SNAP (Supplemental Nutrition Assistance Program) benefits at different markets and the Double Up Food Bucks program. One producer discussed distance and certification concerns, and one noted needing product liability insurance at a particular market. Lastly, a plurality of producers said they are facing no market barriers, the largest grouping of all the revenue brackets. Why did so many say there are facing no barriers? How is this connected to the lack of desire to expand? Why are they farming and selling?

**Barriers to participation in farmer’s markets**

Almost half of all producers vending at farmers’ markets did not identify any barriers to farmers’ markets. Other barriers identified include regulations (2), relationships (1), time (2), locations/distance (2), product and competition. Regulations include non-compete clauses, as well as insurance. Again, this is market protectionism that secures sales for particular vendors. “Clique politics” can also be related to the non-compete clauses, as this demonstrates how certain power brokers exert control over what the market looks like and how it operates. Time was an important barrier, particularly in honey production that requires quick transfers of product to avoid crystallization. Locations/distance cite a mileage requirement that again ties back to politics and who is controlling the market. Who decided that 50 miles was the cutoff, and why? Part of this is connected to the issue of competition, as referenced elsewhere. Lastly, an ambiguous reference to “product” without context does not allow us to infer what that is trying to articulate.

**Barriers to participation in food hubs**

A majority of the producers grossing $10K or less stated that there are no barriers to working with food hubs. Many reasons were listed for this being the case, including how “easy for the farmer,” “guaranteed every week sales” and noting that “they are a great bunch of people.” These positives all appear to outweigh any negatives. The only barrier identified in the group was “distance,” however there is no context for this statement. It can be inferred that distance is a time issue, and perhaps a cost issue as well.

**Barriers to participation in restaurants**

Once again, no barriers was a common response for producers bringing in $10K or less in revenue. Costs and competition are interrelated, as both are talking about the issues of economies of scale that are not available for specialty food crop producers. There is also an
interesting divide discussed between management and chefs within restaurants, as one wishes to limit expenses but the other wishes to utilize fresh local produce. Travel is discussed once more, as “travel is long.” Relationships are again key to making the producer-restaurant partnership work.

**Barriers to participation in grocery stores**

Competition from larger corporate agriculture is the main barrier identified by producers selling to grocers. They are unable to turn a profit because they are not producing enough to lower their overhead relative to their sales. This makes selling to grocers financially unfeasible.

**Barriers to participation in CSAs**

Producers operating a CSA list a number of barriers. First and foremost is knowledge. What is a CSA? How does it work? Without understanding how this market works, it makes it difficult for customers to be on board. Related to this is retaining customer base. What keeps customers coming back to the CSA? Perhaps part of this is variety of produce. Customers may not want the same products every week, so by offering a mix of products CSAs can keep customers. Lastly, one producer identified that distance is a barrier. Without context, it is difficult to ascertain where this producer is going and why.

**Barriers to participation in large institutions**

Producers selling to large institutions listed a few barriers. Similar to other revenue brackets, relationships between organizations is crucial to maintaining the partnership. This includes understanding labor constraints and size of the farms. Pricing is another concern, and this is because the producer is not getting the premium from large institutions that they get from direct sales. This might discourage other specialty crop producers from exploring this market. Lastly, the seasonality of the large institution has an impact (the producer sells at a ski resort during the winter months). This is impactful because this is a market with a small window of opportunity.

**Desired Market**

A plurality of producers grossing <$10K in annual revenue said that they are not looking to access any markets in the future. Not many elaborated why, but the few that did mentioned not having the time to slow down and assess that or being too busy getting up early as is. Farmers’ markets and direct sales are the most sought after markets, from being closer to more people and more money. Six producers expressed general interest in accessing other markets in the future but did not share what types. Two producers are interested in large institutions, with an eye towards selling at a hospital and doing farm-to-school or field trips. Three producers want to get involved with CSAs. One producer noted food hubs, another reaching out to restaurants but being concerned with consistency on their end, and one person said they would like to sell wholesale. Two producers are interested in exploring festivals, women’s retreats, classes, dances, and a food co-op. However, these are business opportunities less focused on food and farming from the context.
Next Steps

Based upon the findings in our report we make the following recommendations for next steps as the WV Food and Farm Coalition and its partners advance specialty food crop production, farm viability and market participation in West Virginia.

Building Pathways for Beginning and Emergent Farmers

Beginning farmers are producers with 10 years or less experience. As identified in the report, farmers attempting to establish a farm enterprise in WV face what one producer called a “mess of barriers” that are distinctive to them. These barriers include land access and ownership, securing capital and labor, and market saturation. Though not unique to beginning farmers, they are the most vulnerable group facing these barriers to entry. Therefore there is particular urgency in addressing these concerns. Farming should not be limited just to those with extensive resource endowments, inheritance, or retirement income. We need a pathway to farming for everyone especially forthcoming generations.

Forging and Sustaining Full-time Farming Opportunities

Farmers earning more than $50,000 in annual revenue tend to engage in more full-time production and marketing activities. This includes production and market diversification that secures viable farm enterprises. However, few specialty food crop farmers who wish to be full-time can take the risk to rely on crop production for their income. Indeed, most are locked in as part-time farmers. Pursuing policies that reduce risk and incentive programs that target part-time farmers that fall into the small-scale, micro-scale or emerging farmer categories may enable them to expand production and devote more time to marketing. Risk reduction support could unlock potential.

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Diversifying Market Participation

There is growing competition among specialty food crop producers for an ever shrinking consumer pie. Farmers’ markets are the most commonly accessed market type and the type that farmers report generates the most revenue. However, farmers’ markets only reach roughly 1% of the WV population. Expanding participation in farmers’ markets is vital to long term viability of this sector. Farmer’s argue that viable farm enterprises depend on moving beyond farmers’ markets and a “both / and” approach to market channels. There are five other market types (direct to consumer, wholesale, grocer, restaurant, and community-supported agriculture) common to specialty food crop farmers described in the report. Our report not only contains producer-identified barriers to participation in these markets, but also producer success stories.
Enhancing Culture of Association, Building Cooperatives

Promoting a culture of association and learning to build cooperatives (production, marketing, technology, credit) is critical to supporting viable farm enterprises and the growth of the specialty food crop sector in West Virginia. Policies and programs seeking a pathway for beginning farmers and forging full-time farming should include a strategy of association and cooperative development.

Reducing barriers to food access

A major bottleneck to building viable enterprises in the specialty food crop sector is that producers often rely upon consumers with higher income for a majority of their sales. In other words, the low-income of West Virginia residents affects the revenue of the producers of specialty food crops. Connecting food access policy and farm development policy is critical to building viable farm enterprises in West Virginia.