



Local Food and Farm Assessment:

North Georgia

Prepared for: Northwest Georgia Regional Commission

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ASAP has been a national leader in the local food movement for more than a decade. ASAP's mission is to help local farms thrive, link farmers to markets and supporters, and build healthy communities through connections to local food. The organization's work includes a broad array of planning, communication, grassroots organizing, research, and advocacy in order to generate awareness of local farms and increase consumer demand for local food, develop the regional capacity to support local farms, expand the availability of locally grown food, and foster systemic change in agriculture and the food system.

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Introduction

This report provides the results of research conducted by the Local Food Research Center of ASAP (Appalachian Sustainable Agriculture Project) for the Northwest Georgia Regional Commission. The purpose of this research was to analyze agricultural production and local food spending for 34 Appalachian counties in North Georgia. The assessment employed surveys and other primary and secondary data to analyze regional trends in agriculture, document the food and farm products currently produced, and examine the relationship between foods grown in the region and consumption and spending by local residents and visitors. This report, which presents a wide-ranging analysis of information on the North Georgia region's food and farm economy, is designed to inform the expansion of the local food system in this region.

The report summarizes agricultural statistics for the 34 Appalachian counties of North Georgia including: Banks, Barrow, Bartow, Carroll, Catoosa, Chattooga, Dade, Dawson, Elbert, Fannin, Floyd, Forsyth, Franklin, Gilmer, Gordon, Habersham, Hall, Haralson, Hart, Heard, Jackson, Lumpkin, Madison, Murray, Paulding, Pickens, Polk, Rabun, Stephens, Towns, Union, Walker, White, and Whitfield counties. This area will be referred to as the "North Georgia region" for the remainder of the report.

Report findings are based on the analysis of primary and secondary data and published statistics from the 2010 Georgia Farm Gate Value Report, USDA Census of Agriculture, U.S. Census Bureau, and other relevant data sources, and on the results of a survey conducted by ASAP in 2013 with residents in the North Georgia region.

The first four sections of this report focus on statistical data regarding farm and farmland trends in the region. These sections are followed by an analysis of food consumption and production patterns for the region. The last section of the report provides recommendations for strategic action and next steps for developing the local food and farm system of the North Georgia region.

Note on Report Methodology

Every five years the United States Department of Agriculture conducts a Census of Agriculture to collect facts and record figures about American agriculture for every state and county in the United States. The Census of Agriculture is the most comprehensive source of agricultural data available to food systems researchers and is therefore a primary source of information for this report. However, the most recent published version of the Census comes from 2007. Therefore, the agricultural statistics in this report are supplemented by data from the 2010 Georgia Farm Gate Value Report (FGVR), which was compiled and published by the Georgia Center for Agribusiness & Economic Development. This publication details annual county-level

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information for the value of food and fiber crops in Georgia as reported by Cooperative Extension agents.

1. The Food and Farm System

The farming tradition in Georgia dates back over two centuries with agricultural production playing a dominant role in Georgia’s economic history. The North Georgia region covers a range of physiographic provinces including the rough, hilly surfaces of the piedmont, rugged summits of the Blue Ridge Mountains, and the sandstone, shale, and limestone lined floors of the valley and ridge provinces.¹ Farmers in each of these areas face unique challenges and blessings related to local topography. Historically, just as today, farming in the North Georgia region requires balancing the limits of the land with the availability and demands of the market.

Section 1. Farm Demographics

As of the 2007 USDA Census of Agriculture, the North Georgia region was home to 14,839 farms and nearly 1.5 million acres of farmland, which covers 22 percent of the total land area of the region. The region has 22,027 farm operators (1.2 percent of the region’s 1,804,922 residents).

Table 1 illustrates the distribution of farm sizes in the 34 counties based on the 2002 and 2007 censuses of agriculture. Small to mid-sized farms between 10 and 180 acres were the most common in both census years accounting for 78 percent of all farms in 2002 and 79 percent of all farms in 2007. Between 2002 and 2007, only farms between 10 and 49 acres showed growth in number (+3 percent) with all other farm size categories showing sizeable decreases. With an average farm size of 96 acres in 2007, the table shows that the majority of farms in the region are smaller than the Georgia state average size of 212 acres.

Table 1. Farms and Acres of Farmland			
	2002	2007	% Change
Farms	15,423	14,836	-4%
Land in farms (acres)	1,584,472	1,454,817	-8%
Average size of farm (acres)	102	96	-6%
Size of farm (acres)	2002	2007	% Change
1 to 9 acres	1,195	1,096	-8%
10 to 49 acres	6,369	6,564	+3%
50 to 179 acres	5,722	5,215	-9%
180 to 499 acres	1,718	1,592	-7%
500 to 999 acres	305	272	-11%
1,000 acres or more	114	97	-15%
Total	15,423	14,836	-4%

Source: USDA Census of Agriculture, 2002 and 2007

Even though the North Georgia region represents a significant proportion of Georgia’s agricultural production, the area has been experiencing a decrease in numbers of farms and in

¹ Kevin Chambers. Director of Communications for Georgia Environmental Protection Division. E-mail message to author, May 8, 2013.

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farmland. Table 1 also shows trends in farm numbers and farmland acreage in the North Georgia region from 2002 to 2007. The total acreage of farmland declined eight percent from 2002 to 2007. The total number of farms in operation also decreased (-4 percent), as well as the average size of farms (-6 percent). While the number of farms nine acres or less declined 8 percent, the number of farms 10 to 49 acres experienced moderate growth with an increase from 6,369 to 6,564 farms (+3 percent). Very large farms experienced the greatest losses over the time period with farms over 180 acres declining eight percent. However, the backbone of agriculture in the North Georgia region still lies in small to medium sized farms (179 acres or less), which accounted for 87 percent of farms in the region in 2007.

For comparison, nationally, the number of farms increased 3.6 percent from 2002 to 2007. The majority of this increase occurred in small farms. Farms in the 1 to 9 acre category increased nearly 30 percent while those 10 to 49 acres rose 10 percent. Though the total number of farms decreased in the North Georgia region—commensurate with the national trend—the area did experience a growth in smaller farms between 10 and 49 acres (+3 percent).

Section 2. Cash Receipts from farming

According to the 2007 Census of Agriculture, total agricultural receipts reported for the 34 counties accounted for over \$2.8 billion, a 44 percent increase from total agricultural receipts reported in 2002. Corresponding to the agricultural statistics for the nation as a whole, overall the region has a proportionally small number of farms responsible for a disproportionately large amount of earnings. In the 2007 census, far more farms in the area reported small earnings than reported large earnings. Table 2 shows that 57 percent of all farms in the region had sales of less than \$10,000; 78 percent of farms had sales of less than \$25,000.

Value of Sales	Number of farms	% of total
Less than \$2,500	6,884	46%
\$2,500 to \$4,999	1,648	11%
\$5,000 to \$9,999	1,635	11%
\$10,000 to \$24,999	1,516	10%
\$25,000 to \$49,999	542	4%
\$50,000 to \$99,999	297	2%
\$100,000 or more	2,317	16%

Source: USDA Census of Agriculture, 2007

Table 3 provides a breakdown of selected farm products sold in 2002 and 2007 in the North Georgia region. Note that the agricultural production data are inexact. In some cases, the USDA suppresses county-level data, for example, when production is limited or only one or two farms report growing a particular crop. In other cases reported acreage may be higher than actual acreage because of formulas the USDA uses to create county profiles based on limited information. All USDA estimates used in this report should be viewed in this context.

Even with incomplete data, what is clear from Table 3 is the predominance of livestock, poultry, and their products in the region in both 2002 and 2007. Poultry and eggs comprised the majority of these figures; they accounted for 90 percent of all agricultural products sold in 2002 and 91

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percent in 2007. This statistic is not surprising as Georgia was the number one national producer of poultry in the country in both the 2002 and 2007 Census of Agriculture.

Table 3 also shows the importance of cattle and calf production, which accounted for approximately 3.5 percent of agricultural sales in both 2002 and 2007. The remaining products such as vegetables, fruits, and goat products accounted for a very small proportion of total sales, however some of these sectors experienced significant growth between 2002 and 2007, for instance fruit and berry sales which showed a 138 percent increase.

	2002	2007	% Change
Total value of agricultural products sold	\$1,986,848,000	\$2,856,803,000	+44%
Value of crops including nursery and greenhouse	\$64,584,000	\$66,267,000	+3%
Value of livestock, poultry, and their products	\$1,922,265,000	\$2,742,578,000	+43%
Direct sales to consumers	\$2,414,000	\$3,460,000	+43%
Vegetables, melons, potatoes, and sweet potatoes	\$4,921,000	\$1,988,000	-60%
Fruits, tree nuts and berries	\$2,214,000	\$5,262,000	+138%
Poultry and eggs	\$1,796,191,000	\$2,598,416,000	+45%
Cattle and calves	\$68,883,000	\$97,740,000	+42%
Milk and other dairy products from cows	\$17,977,000	\$12,083,000	-33%
Hogs and pigs	\$3,069,000	\$3,456,000	+13%
Sheep, goats, and their products	\$499,000	\$674,000	+35%

Source: USDA Census of Agriculture, 2002 & 2007

Also of note in Table 3 is the growth in direct sales in the North Georgia region. Direct sales include farm products that are sold by the farmer directly to the consumer without an intermediary—through farmers markets, roadside stands, or pick-your-own sites. An increasing number of producers both in the North Georgia region and across the nation are using direct-to-consumer outlets as a way to capture a larger proportion of consumer food expenditures and increase profit margins. The 43 percent increase in direct sales in the North Georgia region from 2002 to 2007 represents an increase in the number of farmers in the region who see the opportunities and potential of participating in these direct market channels.

According to the 2010 FGVR, farms in the North Georgia region make up a significant percentage of farm production in the state. Franklin, Banks, Hart, Jackson, and Hall counties rank among the top ten most valuable counties in the state based on the farm gate value of their production. This is largely due to the presence of large scale poultry and egg production in these counties; nine of the top ten poultry and egg producing counties in the state (in terms of dollar value) are located in the North Georgia region.² In terms of overall farm gate value for 2010, the counties of North Georgia ranked anywhere from number two in the state (Franklin County) to number 145 (Towns County) compared to the other 159 counties. However, the majority of the counties in the region are grouped towards the top of the rankings, solidifying agriculture as a top economic driver for the North Georgian region, and for the state of Georgia as a whole.

² Franklin, Habersham, Madison, Banks, Jackson, Hart, Hall, Gilmer, and Carroll County.

2. Trends in Farming and Farmland

The previous numbers give an overview of the North Georgia region's farm economy. A fuller picture emerges when regional trends and their effect on production are examined.



Section 2. Aging of the Farm Population

According to the USDA, the average age of farmers has increased every year since 1978. The average age of all U.S. farm operators has been greater than 50 years of age since at least the 1974 census. Between 2002 and 2007, the national average increased from 55.3 years of age to 57.1 years of age. Farmers in the North Georgia region are slightly older on average than those across the country; the average age of farmers in the region in 2007 was 57.3.

Definite relationships exist between age of farm operator and particular farm characteristics. For example, family farms typically have older farm operators than corporate farms, and farms in smaller income classes typically have older farm operators than larger income class farms. With the high percentage of family farms in the region, it is not surprising that the average operator age is greater than the national average.

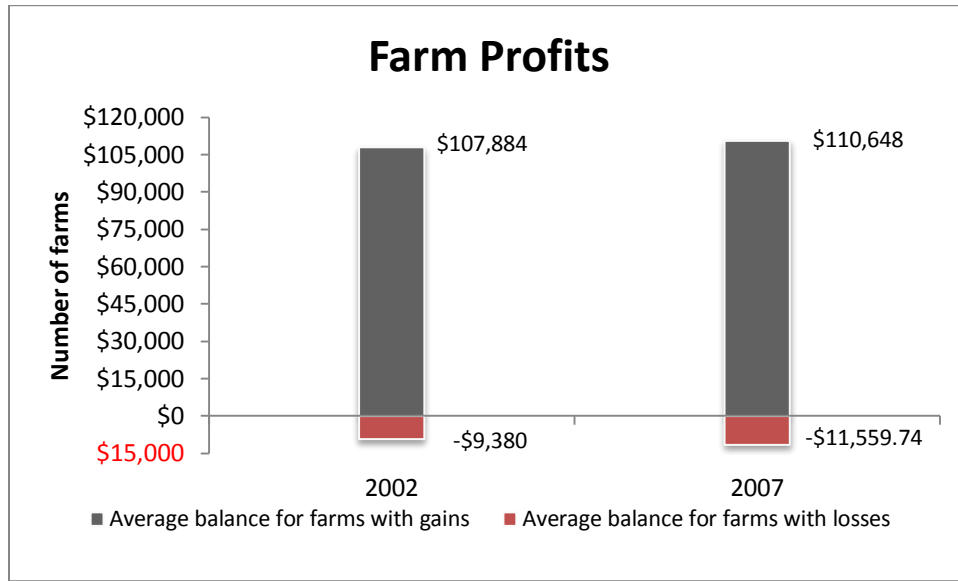
Beginning in 2002, the USDA began gathering additional information about farm operator characteristics to help clarify issues related to the aging of the farm population, such as farm succession plans and the extent to which young farmers are replacing older farmers as they retire from farming. The new data indicates that only about 9 percent of all farms nationwide have multiple operators from different generations working on their farms as farm operators, and the likelihood of having multiple operators is significantly lower for lower income class farms that predominate in the region. As farmers in the region approach retirement age, who will continue to farm the land is a pressing issue that will face local agriculture.

3. Economic Considerations

An analysis of current farm profitability is necessary to determine the long-term viability of the region's farms. The USDA reports that the net cash farm income for farmers in the North Georgia region in 2007 was \$546,072,000 – down 14 percent from the 2002 net cash income of \$636,309,000 – with farms in the region earning on average \$33,130. Alone these averaged figures do not accurately represent the patterns in farm profitability for the area. Figure 2 shows that the net cash farm income of farms in the region. The chart shows that the average net profit earned by profitable farms (\$110,648 in 2007) far exceeds the average net loss of unprofitable farms (-\$11,560 in 2007).

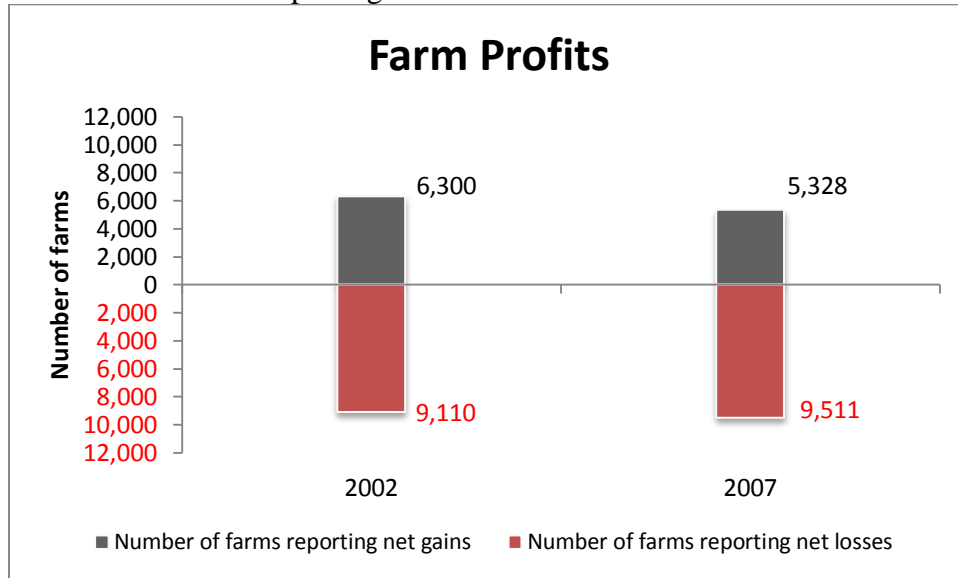
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Figure 1. Farm Profits: Net Cash Farm Income



However, there are other important pieces to the farm income profile. Figure 2 is similar to Figure 1 in that it depicts farm net cash income; however, the focus of Figure 2 is the number of farms reporting net gains or net losses. For the region, the total number of farms reporting net gains in 2007 was 5,328. The total number of farms reporting net losses in 2007 was nearly twice as high at 9,511.

Figure 2. Farm Profits: Farms Reporting Net Gains and Net Losses



Therefore, while the profitable farms (from Figure 2) in the area reported high average gains and gave the region an overall positive production balance in 2002 and 2007, a much larger number of individual farms report a net loss of money. It is not uncommon for farms to report a loss,. Farm operations are afforded many federal tax breaks and write offs, and small farms often maximize benefits, using business expenses to offset income.

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The Census of Agriculture uses tax-based definitions to measure farm profitability and success, but these measures are not always accurate, nor are financial measures the only way to show success. There are a large number of farmers in the Census of Agriculture who do not farm as their primary occupation and who earn an undisclosed amount of money from off-farm jobs. In the 2007 Census of Agriculture 6,247 farmers in the region reported farming as their primary occupation while 8,592 (58 percent) reported “other” as their primary occupation. Some farms stay in farming for reasons other than supporting the family income, such as continuing a family tradition, maintaining a rural lifestyle, or so that they can access tax breaks given to farms through programs like Current Use Valuation, which taxes farm property at a lower rate than non-farms. Thus, while net cash farm income data are useful in understanding a broad pattern of the financial profile of the region’s farms, it is not the last word on farm profitability.

Regardless, long term sustainability of the farm sector depends on the ability of regional farms to make money. The ability of individual farms to earn a profit depends on their capacity to increase total revenues and/or lower total costs. Revenue streams and costs of production vary substantially by product. Meat prices, for example, are much higher per pound than vegetable prices, but the costs of production are also much higher. Revenues are driven by market prices, which are largely out of producers’ control.



One bright spot is the rise in the popularity of local food and farm products, which can provide an avenue for increased profits and lower production and distribution costs for farmers.

4. Opportunities in the Local Market for Locally Grown Food

The emphasis on expanding local markets for local farm products in this report is based on an underlying assumption that local markets can both increase the market value of farm products – by enabling farmers to earn a premium for locally grown foods – and reduce total costs by shortening the transaction chain between farmers and

end consumers.

Data released by the USDA Economic Research Service reports that local food sales through direct and intermediate markets in the US grossed over \$4.8 billion in 2008. For direct sales alone the 2007 Census of Agriculture reported \$1.2 billion, a 50 percent increase from the direct sales total in 2002 of \$812 million. Agricultural Census data for 2007 further shows an increase in the number of farms, particularly small farms (those less than 50 acres), which reverses a decades-long trend. Both trends reflect the rapidly growing consumer interest in knowing who is growing their food. National market research by firms like the Hartman Group and JWT Advertising have tracked the shift in consumer demand to favor locally grown foods, and nationally, local food sales have doubled to \$11 billion over the past ten years.³

³ Joan Voight, “As Americans Rush to Fresh Food, Supermarket Chains Follow,” *CNBC.com*, October 8 2012, <http://www.cnbc.com/id/49101716>.

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Evidence of the interest in local food in Georgia can be seen in the proliferation of studies around local food development in the state. The University of Georgia, College of Agricultural and Environmental Sciences, Center for Agribusiness and Economic Development has published two reports about the impacts the state might see if Georgians ate Georgia produce, meat, and dairy.⁴ The reports quantify current demand for farm products by residents and production by the state's producers, and attempt to extrapolate the economic benefits of a transition to local.

The most direct evidence of Georgia residents' demand for local is in the increase of direct sales and the growth of direct to consumer outlets. As stated previously, the North Georgia region experienced a 43 percent increase in direct sales from 2002 to 2007. In addition, Georgia ranked ninth on the USDA's top ten states for winter farmers markets. This was Georgia's first time on the winter market top ten list with a recorded 55 markets.⁵ The momentum around the idea of local markets in Georgia is a clear manifestation of consumer desire for local.

Consumer Demand for Locally Grown Food



Consumer desire for local food in North Georgia is demonstrated through the results of a 2013 survey of residents living in the 34 counties of the North Georgia region. A total of 741 area residents participated in an online survey asking about their perceptions of local food and farms, views and values related to local agriculture, and local food purchasing habits. The results show that North Georgia residents value local food; they believe buying locally contributes to the local economy and helps to support local farms. They also value local because it's "fresher," "healthier," and "buying local-food, services, retail-benefits the local economy and future viability." Though some participants noted that they might not choose to purchase locally produced products because the prices can be too high (38 percent) or because they do not want to make special trips to purchase local foods (24 percent), 46 percent of respondents indicated that there is no reason why they would not purchase locally grown foods.

In addition to stated preferences for local foods, the survey results show that there is already an abundance of local food purchasing already happening in the region. Of the 741 participants who responded to the survey, 69 percent said they purchase local food at farmers markets, 53 percent

⁴ Sharon Kane et al., "The Local Food Impact: What if Georgians Ate Georgia Produce?" *The University of Georgia Center for Agribusiness and Economic Development College of Agricultural and Environmental Sciences*, Athens, GA, 2010. and

Sharon Kane et al., "The Local Food Impact: What if Georgians Ate Georgia Meat and Dairy?" *The University of Georgia Center for Agribusiness and Economic Development College of Agricultural and Environmental Sciences*, Athens, GA, 2010.

⁵ Gwen Sparks, "More Communities Warm Up to Winter Markets National Farmers Market Directory Sees 52 Percent Spike in Winter Listings," *USDA Agricultural Marketing Service*, News Release, December 5 2012, <http://www.ams.usda.gov/AMSV1.0/ams.fetchTemplateData.do?template=TemplateU&navID=&page=Newsroom&resultType=Details&dDocName=STELPRDC5101473&dID=178935&wf=false&description=More+Communities+Warm+Up+to+Winter+Markets+National+Farmers+Market+Directory+Sees+52+Percent+Spike+in+Winter+Listings&topNav=Newsroom&leftNav=&rightNav1=&rightNav2>.

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purchase local food from roadside stands, and 43 percent said they purchase local foods from grocery stores. Survey participants also expressed interest in having local food available in other community locations including restaurants (96 percent), public schools (92 percent), and hospitals (88 percent). Overall, the survey demonstrates that high levels of demand exist for local food in North Georgia.

While participants expressed their support of local food in their communities, they also showed a desire for more locations where they could purchase locally grown food, and an interest in a greater variety of local products. When asked where they typically purchase local food, one participant noted, “Never- because it’s not offered here.” Another participant remarked, “I have to leave [Heard] county to buy locally grown food.” Even with these challenges, participants showed eagerness and a willingness to buy local products including fresh produce, eggs, meats, and cheeses. The survey responses as a whole show a desire for more local food vendors, greater access, increased variety of products, and better outreach about local food availability in the region.

5. Local Production

There is an upper limit to the amount of local product consumers and businesses can purchase from regional growers based on climate and soil-related limitations. Local farmers cannot supply 100 percent of the produce desired by local customers, because they cannot efficiently grow avocados, lemons, or bananas, for example, no matter how much local food infrastructure is improved. They can, however, grow 30 different types of fruits and vegetables that account for 66 percent of the fruits and vegetables most commonly consumed by the region’s residents.⁶ In Table 4, these 30 items are listed along with their corresponding share of total retail produce sales by American shoppers.

Table 4. Dollar Share of Retail Produce Sales for Selected Produce, 2012					
	% of Total Produce Sales		% of Total Produce Sales		% of Total Produce Sales
Apples	7.0%	Garlic	0.4%	Peaches	1.2%
Asparagus	1.4%	Grapes	6.1%	Pears	1.2%
Beans (snap)	0.8%	Greens	0.3%	Peppers (bell)	2.6%
Berries ⁷	3.2%	Herbs	1.0%	Plums	0.5%
Broccoli	1.7%	Lettuce	2.2%	Potatoes	6.0%
Cabbage	0.7%	Melons	0.6%	Pumpkins	0.2%
Carrots	2.4%	Mushrooms	2.2%	Squash	1.4%
Cherries	2.0%	Nuts	0.4%	Strawberries	4.9%
Corn	1.2%	Okra	1.0%	Sweet Potatoes	1.0%
Cucumbers	1.8%	Onions	3.7%	Tomatoes	7.4%
<i>Total share of produce sales that can be grown in the region: 66.5%</i>					

Tables 5 and 6 show production and consumption estimates for 19 of the 30 fresh fruits, vegetables, meat, and dairy items that are produced in the North Georgia region. The column

⁶ *The 2012 Guide Produce Availability & Merchandising Guide*, ed. Lori Fairchild, *The Packer*, Lincolnshire, IL, 2012.

⁷ Berries includes: blackberries, blueberries, boysenberries, and cranberries

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labeled “Acres in Production” shows the current capacity for production as of 2010. The column titled “Sufficient to Supply (x)% of the Local Population” is a calculation to estimate, based on per capita consumption of each food item by North Georgia residents, the approximate amount of local demand that could be supplied by local production.⁸

What is clear from Table 5 is that there is significantly more demand (consumption) than supply for nearly every type of fresh fruit and vegetable grown in the region—save peaches and greens. However, achieving a level of supply equal to the level of consumption in the region for all available produce is not realistic because it assumes year-round production of fresh fruits and vegetables. Rather, there is some point between the recorded percentages and 100 percent that represents a practical target for local production in a strong local food system.

	Acres in Production	Sufficient to Supply (x)% of the Local Population
Apples	629	46%
Grapes	395	22%
Peaches	288	94%
Strawberries	61	7%
Watermelon	292	26%
Beans	78	14%
Cabbage	201	36%
Corn	1280	44%
Cucumbers	22	3%
Greens	359	160%
Peas	45	14%
Peppers (Bell)	35	2%
Squash	93	37%
Tomatoes	461	35%

Source: USDA Census of Agriculture, 2007; North Carolina Department of Agriculture, “Crops Highs & Lows Stocks & Storage: Biotech Varieties Floriculture County Estimates.” *North Carolina Department of Agriculture*. North Carolina Agricultural Statistics. http://www.ncagr.gov/stats/2010AgStat/Page057_082.pdf; ERS/USDA Data Food Availability (Per Capita) Data System: Food Guide Pyramid (2011);

Unlike the case of fresh fruits and vegetables, the yearly reported production of meat products in the region is generally much higher than consumption, particularly for poultry products. Farms in the North Georgia region produce 32 times the amount of chicken that area residents consume, and over two times the amount of beef, though the beef produced is primarily in cow/calf operations where the animals are raised locally but are exported for finishing, processing, and sale.

⁸ For each food item: Sufficient to Supply (x)% of the Local Population = (acres in production* yield in pounds per acre) / (population*per capita consumption in pounds) aka pounds produced divided by pounds consumed

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	Number of Animals	Sufficient to Supply (x)% of the Local Population
Beef	321,894,358	206%
Chicken	5,292,295,232	3,168%
Pork	601,907	1%
Turkey (2007)	105	0.01%
Fluid cow's milk (2007)	13,180	73%

Source: USDA Census of Agriculture, 2007; North Carolina Department of Agriculture, "Crops Highs & Lows Stocks & Storage: Biotech Varieties Floriculture County Estimates." *North Carolina Department of Agriculture*. North Carolina Agricultural Statistics. http://www.ncagr.gov/stats/2010AgStat/Page057_082.pdf; ERS/USDA Data Food Availability (Per Capita) Data System: Food Guide Pyramid (2011);

As with meat production, dairy production is a dominant feature of agriculture in the region. Table 6 shows that an estimated 232 million pounds of cow's milk were produced in the region in 2007, sufficient to supply 73 percent of regional demand. Some portion of the 232 million pounds is marketed as fluid milk, and some is used to make cheese and other processed dairy products. No information is available from government sources detailing the end uses of milk produced in the area.

While tables 5 and 6 show overall production for fresh fruits and vegetables, meats and dairy products in the region, they do not differentiate between farms that sell their products to local markets and those that do not. The majority of the region's food products are not marketed for local consumption, however shifts are occurring with the emergence of local markets for locally grown food. Farmers who market their products to local sources – farmers markets, CSAs, independent restaurants, local grocers, local wholesalers – sell a wide variety of fresh produce, meats, and cheeses, though their production tends to be in smaller overall quantities and produced on small to mid-sized farms.

Small producers selling their products to local markets face a unique set of legal and infrastructure challenges. For instance, producers growing fruits and vegetables may face infrastructure challenges, such as the need for refrigerated trucks and warehouse space. For small meat producers, access to government-inspected processing facilities is a principal infrastructure obstacle. In addition, all farmers selling to more mainstream local markets need to understand and be able to satisfy the standards for different food industry segments, for example, packaging, labeling, food safety requirements, distribution standards, quality standards, traceback standards, etc. Even so, the significance of locally grown food lies in its potential to increase returns to individual farmers and generate economic impact for the region.

6. Consumer Food Spending

Based on 2012 population estimates, the residents of the 34 counties spent \$4.2 billion on food. Regional estimates indicate that the average household in the southern U.S. spends 59 percent of total food expenditures on food consumed at home and the remaining 41 percent on food consumed away from home. For the North Georgia region where 1,804,922 residents equals 721,969 households, this figure breaks down to \$2.4 billion spent on food consumed at home and \$1.7 billion spent on food consumed away from home.

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Figure 3. USDA Economic Research Service Food Dollar

Fruit and vegetable spending represents a portion of total food spending. Going back to Table 5 from the previous section, in 2012 the retail value of resident spending in the 34 counties on the selected fruits and vegetables totaled just over \$418 million dollars, or about 10 percent of total food purchasing.⁹ In comparison, farms in the 34 counties produced the retail equivalent of around \$100 million dollars of the same fruit and

vegetable products listed in Table 5. The difference between \$418 million dollars in spending and \$100 million dollars of local product represents an opportunity for an expansion of local food sales and local fruit and vegetable production in the 34 county region.

Food Dollar Considerations

The percentage of each dollar spent on food that goes to the farmer who produced it differs depending on where food is purchased. For instance, if a farmer sells a product directly to a consumer—at a farmers market, through a CSA, or at a roadside stand—the farmer retains all earnings from that product (though they may have more costs in labor and marketing). On the other hand, in the case of grocery store spending, an average of only \$0.18 of every dollar spent on food goes directly to the farmer. The rest of the dollar pays for the processing, energy, packaging, advertising, salaries, and other expenses that went into getting the product from the farm to the shopper’s grocery bag.

For away-from-home spending, including food purchases at restaurants, hospitals, parks, workplaces, etc., the average proportion of each food dollar that goes to the farmer decreases significantly to just \$0.03. The majority of the food dollar that makes up away-from-home spending goes toward labor (\$0.74). In terms of the local economy, this means that significant percentages of every retail dollar spent in a local restaurant or grocery store may stay in the local economy in the form of payroll for local employees. Localizing a community’s food system may not have the potential to bring large quantities of new money into an area because much of that money is already present in the form of community wages; however there are large financial benefits that can accrue to local producers and locally-owned businesses with the development of local market opportunities.

The impacts of consumer food spending on the local food and farm economy lies in the potential of local sales to increase returns to individual farmers and by keeping more of the food dollar

⁹ U.S. Bureau of Labor Statistics. “Table 33. Southern region by income before taxes: Average annual expenditures and characteristics.” Consumer Expenditure Survey, 2009-2010. *U.S. Bureau of Labor Statistics*, September, 2011. <http://www.bls.gov/cex/2010/CrossTabs/regbyinc/xregns.PDF>

This figure can also be calculated using the USDA’s Food Availability (Per Capita) Data System which breaks down per capita consumption in pounds of fruits and vegetables. These totals multiplied by “The Packer 2012 Produce Availability and Merchandising Guide” yield nearly equivalent results (\$419 million dollars vs. \$418 million dollars).

with locally owned businesses. Since demand for food stays relatively constant (i.e., there is only so much food people can consume) the primary way for food producers to increase their proportion of earnings is to take over other sectors of the food dollar. For example in the case of direct marketing, a producer grows, transports, packages, markets, and sells his or her own product and, accordingly, is able to retain 100 percent of the food dollar. In this way, producers can capture a larger proportion of the food dollar by strategically marketing their products to the local population of consumers and food businesses and earn larger returns for their products. Likewise, locally-owned businesses keep a higher percentage of the food dollar in the local economy by not exporting a percentage of their profits to parent companies that may not be located within the region.

7. Recommendations

There is potentially more demand than supply for many types of food that can be produced in the North Georgia region. Many consumers, businesses, and organizations indicate a desire for more locally grown food than they can currently buy. Supply, in this case, includes all facets of food procurement and distribution including issues involving equipment, facilities, and processes for moving food from farm to market. This final chapter draws on research and information presented throughout the report to generate recommendations and make conclusions about bridging the gap between demand and supply of locally grown food in the North Georgia region.

Demand for locally grown food is increasing nation-wide, including in North Georgia. The following recommendations



reflect an underlying assumption that the local food system will change incrementally over many years and that aiming for maximum potential will require a long-term perspective. Each recommendation is intended to provide insight into current opportunities for supporting and advancing the local food system, as well as recommendations for points of action.

Promote North Georgia farms and food

In the community survey of North Georgia residents, 96 percent of respondents said it was important for local food to be available at local restaurants and 98 percent said it was important that local food be available at grocery stores. With increased interest by consumers in supporting local farms and buying local food, it is vital that consumers know where to find local food across direct, retail, and institutional market settings through advertising, promotions, and labeling. Demand for local can only be realized if consumers can find and identify local products.

Next Steps: Promote what is being grown in the area and where it is being sold. Promote direct to consumer markets – Community Supported Agriculture (CSAs), farmers markets, farm stands. Identify restaurants, grocery stores, and other non-direct market outlets sourcing and selling locally grown food. Help them to promote their efforts to their customers and to the wider community. In the context of increasing interest and demand, marketing and promotion of locally grown through advertisements, in-store promotional materials, packaging and labeling,

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and other forms of promotion is a critical element. Publicize food and farm events: food festivals and farm tours. Partner with groups such as ASAP, Georgia Organics, Farm Bureau, Georgia Cooperative Extension, Georgia Department of Agriculture, grower associations, and others to promote farms and stay updated on community activities.

Local branding is another way to add value to local farm products and provide farmers with a means to increase their marketing power. Encourage area farmers to tap into existing regional branding programs in the area such as the Georgia Department of Agriculture's "Georgia Grown" program,¹⁰ Chattanooga based organization Gaining Ground's "Harvested Here" program, which includes 19 North Georgia Counties,¹¹ and ASAP's Appalachian Grown™ regional branding and certification program which covers 11 North Georgia Counties.¹² Branding will increase the visibility and competitiveness of farm products grown in the region and has the potential to leverage new markets for area farmers.

Promote and support direct-to-consumer outlets

Direct markets can provide the highest return to farmers in comparison to other markets. They provide an easy entry point for farmers new to marketing because of the minimal cost required for entry, and in providing a direct connection between consumer and farmer, they cultivate customer loyalty and advocacy for local farms and food. ASAP surveys of farmers market shoppers demonstrate that markets are supported by an expanding base of repeat customers who shop there not just for food but for the experience of interacting directly with the people that grow their food and for a sense of community. In the survey of North Georgia residents, many respondents expressed their desire for increased access to direct-to-consumer outlets:

“Let’s stimulate the development of a few first-class farmers markets that are easily accessible, competitively priced, and offer products not easily available in supermarkets.”

“There is not a central location in our community (farmers market) to purchase locally grown food.”

Next Steps: Provide support to direct-to-consumer markets in the region. Support might be in the form of the promotion of existing direct-to-consumer outlets—farmers markets, CSAs, on-farm stores and stands; assistance with the expansion of outlets; and/or workshops and training for farmers on relevant topics—salesmanship and display, best food safety practices, food regulation, marketing and promotion, etc. Partner with local farm support organizations—Georgia Cooperative Extension, Georgia Organics, Gaining Ground, ASAP—to connect farms with the information and resources they need to successfully navigate direct marketing.

¹⁰ Georgia Department of Agriculture. “Georgia Grown.” *Georgia Department of Agriculture*. 2011. <http://georgiagrown.com/>

¹¹ Gaining Ground. “Tastebuds Harvested Here Label.” *Gaining Ground, a program of the Benwood Foundation*. 2010. <http://growchattanooga.org/foodguide/how-to-find-local>
The Harvested Here label includes 19 counties in North Georgia: Catoosa, Chattooga, Dade, Dawson, Fannin, Floyd, Forsyth, Gilmer, Gordon, Haralson, Lumpkin, Murray, Paulding, Pickens, Polk, Towns, Union, Walker, and Whitfield.

¹² ASAP’s Appalachian Grown region includes 11 counties in North Georgia: Fannin, Franklin, Gilmer, Habersham, Lumpkin, Pickens, Rabun, Stephens, Towns, Union, and White.

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Provide training and support to farmers

To access the opportunities in local markets successfully, farmers need a combination of skills, resources, and support in multiple areas. Farmers need training and expertise in business and market planning to effectively diversify their farm businesses and market their farm products locally. Farmers need to understand industry standards for different types of local market outlets: packaging, labeling, food safety requirements, distribution, quality standards, traceback standards, etc. Furthermore, farmers need assistance determining what types of market outlets are a good match for the capacity of their farm. For retail and institutional outlets in particular, farmers need assistance developing relationships with buyers and information specific to market requirements and desires. This combination of assistance provides farmers with the support needed to make decisions and implement practices based on careful planning. Decisions based in planning reduce risk and increase the likelihood that strategies are successful, and successful farmers attract new farmers into the market outlets.

Next Steps: Provide area farmers with training and technical assistance opportunities. Access existing resources and opportunities in the region. Partner with local community colleges, Cooperative Extension, Georgia Organics, and other community organizations and agencies to conduct and support training and technical assistance workshops. Georgia Organic has an annual conference that offers in-depth workshops, exhibitors, and educational sessions to producers. Southern Sustainable Agriculture Working Group (Southern SAWG) also offers what they call “the South’s leading sustainable and organic agriculture event, bringing together over 1,200 people annually for peer learning, networking and cross-pollination of ideas.”¹³ ASAP’s annual Business of Farming Conference¹⁴ includes workshops on key risk management strategies in retail, wholesale, and direct to consumer market outlets, QuickBooks and farm financial recordkeeping for farms, food safety, farm business planning, and more. These trainings and conferences offer invaluable information that will help farms stay competitive in North Georgia markets.



Highlight and develop connections between farms and restaurants

As a market choice, restaurants are a good option for farms that do not produce enough quantity to meet large scale markets, but produce unique products desirable to independent restaurants. From the dining perspective, when restaurant patrons learn that the food on their plates comes from a nearby place—a farm and a farmer with a name and a face—it gives the meal and the visit more meaning. In the community survey of North Georgia residents, 96 percent of participants said it as somewhat or very important for local food to be available at local restaurants.

¹³ Southern Sustainable Agriculture Working Group. “About Southern SAWG.” *Southern Sustainable Agriculture Working Group*. 2013. <http://www.ssawg.org/about-us/>

¹⁴ For more information visit <http://asapconnections.org/events/business-of-farming-conference/>

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Next Steps: Efforts focused on deepening connections between local farms and restaurants might include a farm to chef promotional campaign using the Georgia Department of Agriculture’s “Georgia Grown” promotions, Gaining Ground’s “Harvested Here” branding, ASAP’s Appalachian Grown branding and Get Local marketing materials, or a new promotional campaign developed by and tailored for North Georgia communities. A chef promotional campaign could include highlighting one seasonally available product a month. Participating restaurants would feature that product in seasonal dishes. The program would provide a way to promote restaurants already supporting local farms and a means for restaurants interested in sourcing local an easy way to begin. Farm fieldtrips provide chefs with opportunities to experience North Georgia agriculture firsthand and farms with opportunities to develop new business relationships. Farmer-buyers meetings also create a venue for chefs and farmers to develop relationships and discuss specific market and farm needs and requirements. The combination of these activities will simultaneously connect local farms to this market sector, increase the visibility of local food in the community and build awareness, and provide farmers and chefs with practical information about how to build business relationships that last.

Explore the viability of larger scale retail and institutional market outlets

As a market venue for farmers, larger retail and institutional markets should be part of an overall, long term strategy of market diversification and growth. Large markets can not only be difficult for farms to access because of specific institutional and infrastructure requirements, they can be less profitable to individual farms because of budgetary restraints that limit the price a farmer can get for a product, and there is often a middleman involved.

There is a practical limit to how much food can be sold through direct market outlets; the largest share of consumers’ food spending will continue to be in grocery stores. North Georgia has some grocery store chains with local food purchasing programs such as Ingles and Whole Foods Market. Equipped with the knowledge of market standards and desires, these larger scale outlets provide farms with potential marketing options. Organizations such as ASAP, Georgia Organics, and Cooperative Extension have relationships with many larger buyers and can help facilitate suitable market connections.

With the growth of the local food movement, there has also been increasing interest by institutions, schools, hospitals, and colleges, in providing fresh, local options to students, staff, patients, and employees. Institutional market settings like schools and hospitals provide opportunities to highlight the connections between food, food access, and health; nurture healthy eating habits in kids and families; and over the long term build support and appreciation for local farms and food. Moreover, schools and hospitals, because they reach broad constituencies and reach across socioeconomic and other cultural lines, provide opportunities to increase the distribution of fresh, local food to vulnerable children and families. Public schools in particular provide farms in rural settings with market options. Rural areas often lack sufficient market outlets but school systems exist in every county and have the potential to provide a steady market for farmers.

Next Steps: Facilitate linkages between North Georgia farmers and targeted buyers—retailers, restaurants, summer camps, schools, colleges, hospitals. Outreach to buyers across market segments; begin to develop relationship with them and assess market desires and industry

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requirements for things like packaging and labeling, food safety certification, quality standards and traceback, product quantities and distribution. Meet with local farmers to assess the capacity of their operations and to direct them to suitable market outlets, and prepare them to meet industry standards. Work with retailers and institutions to identify what they already purchase from local farms. Develop targeted outreach and promotional efforts geared to each group of buyers, including models of success that can be replicated by different types of organizations.

The knowledge that you develop about the region's food system and the trust and relationships that you cultivate with buyers and farmers will play a crucial role in the region as demand and awareness continue to increase with local food campaign activities. Buyers will look to you for help finding suitable and reliable sources of local product.

Promote positive experiences around local food

Taking a longer view of the development of the local food system, implement strategies in local food campaign activities in North Georgia that promote positive experiences with local food and farms. Farm tours, food and farm festivals, meet the farmer events, food tastings, Farm to School and Farm to Hospital programs provide participants with the means to engage with local farms in meaningful ways, cultivating an appreciation for this natural resource. Furthermore,



research from the health sciences demonstrates that food habits and preferences are directly impacted by positive and negative experiences. Preferences for food develop in positive contexts and aversions to foods develop in negative contexts. Following, children and adults that have positive experiences with local farms and food develop an appreciation for local food and farms.

Next Steps: Organize and/or promote food and farm events around North Georgia farms, like annual farm tours or downtown festivals celebrating local farms and

food. The Georgia Organics website has a webpage dedicated to information on "Farm & Food Tours;"¹⁵ work with these established local food events to help them promote their activities and emphasize the experiential aspects of local farms and food.

In Farm to School, Farm to Hospital, and Farm to College support/promote program activities that emphasize the experiential aspects: farm field trips, cooking demonstrations with seasonal ingredients, tastings, meet the farmer events, school gardens, etc. These hands-on activities engage participants positively with local agriculture. Kids and adults participate in planting and harvesting activities, learn to cook with seasonal ingredients, learn about the cycles of agriculture and the seasonality of crops, meet farmers growing food in their communities, and try new fruits and vegetables. These types of positive experiences influence the formation of eating habits and preferences, create healthier individuals and communities, and develop local food and farm advocates.

¹⁵ For more information visit: <http://georgiaorganics.org/conference/2013-farm-food-tours/>

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Promote North Georgia food and farms to tourists

Tourism is a major economic driver in North Georgia with over \$1.8 billion dollars in direct tourism spending reported in 2011.¹⁶ Of this spending, \$551.3 million can be attributed to spending on foodservice in restaurants, grocery stores, and other establishments serving food and beverages.¹⁷ This figure represents a significant opportunity for local producers to market an authentic Georgia food experiences to tourists. Visitors to North Georgia come to the area to experience rural heritage and scenic vistas. Marketing the region as a food and farm destination can entice visitors to come to the region to experience local food activities (shopping at farmers markets, participating in local food festivals, eating at food venues that feature locally grown farm products) and capture some of their away from home food spending in the form of tourism food dollars.

While promoting experiences that bring agriculture and tourism together—agritourism—is not a new idea, an expanded notion of agritourism includes experiences with the region’s agriculture that happen off-farm as well as on-farm. Off-farm connections might involve eating at a restaurant or staying at a Bed & Breakfast that features locally-grown food, attending a festival or event celebrating regional cuisine, going to a farmers market, or traveling a scenic trail through the region’s farmland. These kinds of experiences are important because, while not all farms can welcome tourists to their farm for events and activities, all farms can benefit from the visibility and excitement generated.

Next Steps: To align tourism and agriculture a first step might be to conduct a “needs assessment” with tourism authorities and economic development officials in your area to gauge interest and assess opportunities. What do they need to promote local farms and food? What tools, resources, and support would be most useful to them? What ideas do they have to highlight the farms and distinct food ways in their communities? This information will help you to focus your efforts and resources and develop a strategy grounded in industry feedback. Tourism and agriculture activities might include an outreach campaign to tourism authorities about existing resources (e.g. local food guides) or the re-packaging of existing resources in a more tourism friendly format (e.g., visitor center rack cards) or the creation of new promotional tools and resources (e.g. materials that are specific to North Georgia, food and farm trip planners and maps, etc.). ASAP’s *Farm Promotion and Support: Ideas and Tools for Economic Development and Tourism Development Authorities*¹⁸ is a good resource to get started in thinking about accessing and building the potential of farm tourism in the area.

¹⁶ Georgia Department of Economic Development. “County Level Economic Impact Sheets: 159 County Sheets.” *Georgia Department of Economic Development*. 2012.

<http://www.georgia.org/SiteCollectionDocuments/Industries/Tourism/2013-County-Sheets.pdf>.

¹⁷ According to the report, 30.3 percent of total domestic traveler expenditures in Georgia go to foodservice. For each county, foodservice expenditures were calculated as total tourism expenditures multiplied by 30.3percent. U.S. Travel Association. “2011 Travel Economic Impact on Georgia State, Counties and Regions.” *Georgia Department of Economic Development*. 2012.

<http://www.georgia.org/SiteCollectionDocuments/Industries/Tourism/IndustryResearch/2012/2011%20GA%20Report%20-%20Intl%20Revised.pdf>.

¹⁸ Appalachian Sustainable Agriculture Project. “Farm Promotion and Support: Ideas and Tools for Economic Development and Tourism Development Authorities.” *Appalachian Sustainable Agriculture Project*. 2009.

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Tap into existing resources in your region

The recommendations in this report cite many ASAP resources and tools available to North Georgia farmers farming in Appalachian Grown counties. This recommendation summarizes these resources and lists additional resources from Georgia Organics available to all North Georgia farms. This list is not exhaustive; investigate other types of assistance and resources available through farm support services and other organizations in the region.

ASAP Services

- *ASAP's Local Food Guide and Wholesale Local Food Guide:* Encourage more farms and businesses in the Appalachian Grown counties to get listed in the Local Food Guide. Basic farm listings are free and business listings are very affordable. Registering for the guide also provides farms with the ability to list their business in the Wholesale Local Food Guide, a farm to business trade directory.
- *Appalachian Grown:* Utilize ASAP's Appalachian Grown regional certification and branding program. The logo provides farms with a way to distinguish their products in the marketplace and businesses with a way to promote their support of the region's farms. ASAP has stock marketing materials available (wax boxes, bags, twist ties, case stickers, etc.) and also creates custom materials (farm profiles, table tents, posters, etc.).
- *Beginning Farmer Program:* ASAP in collaboration with Mountain BizWorks and Organic Growers School offers beginning farmers with an array of training and technical assistance on business and market planning, farm financial recordkeeping, farm management skills, and sustainable production techniques. Visit http://www.asapconnections.org/beginning_farmers.html for more information about training and resources available through this program.
- *Business of Farming Conference:* Annually ASAP hosts a conference for farmers at Warren Wilson College in Swannanoa. The conference provides farmers with a full day of workshops on marketing and business resources.

Georgia Organics Services¹⁹

- *Annual Conference:* Georgia Organics offers Georgia's largest educational event on sustainable agriculture featuring workshops, farm tours, exhibits, and a Farmers Feast.
- *Sustainable Agriculture Mentorship Program:* A program for farmers and ranchers to receive technical, planning and marketing support from experienced farmers and professionals.
- *Workshops and field days:* Workshops and field days are offered to educate farmers and gardeners on sustainable growing methods.
- *Local Food Guide:* Georgia Organics produces a local food guide, distributing approximately 60,000 copies per year. They also produce an online version available at <http://localfoodguide.georgiaorganics.org/>.

<http://asapconnections.org/downloads/farm-promotion-and-support-ideas-and-tools-for-economic-development-and-tourism-development-authorities.pdf> .

¹⁹ Georgia Organics, "Georgia Organics Programs – Resources." *Georgia Organics*. 2012. <http://georgiaorganics.org/about-us/resources/>.

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Gaining Ground of Chattanooga

- *TasteBuds Local Food Guide*: Gaining ground produces an online and print local food guide called Tastbuds. In 2012 the guide listed 217 local food partners farms. Farms located within 100 miles of Chattanooga, TN are eligible for listings in the guide, though the Gaining Ground website says that farms just outside of the 100 mile radius will be considered and should contact the program's director if they are interested (<http://growchattanooga.org/foodguide/about>).
- *Harvested Here*: Gaining Ground's Local Food Program includes the Harvested Here label which identifies products grown within 100 miles of Chattanooga. To be eligible for the program farms must be locally owned and operated, grow or raise the edible agricultural products that it sells, and place the Harvested Here logo on their products. In return, the Local Food Program provides marketing and promotional support to its members. (For more see: <http://growchattanooga.org/foodguide/how-to-find-local>)

Southern SAWG

- *Annual Conference*: Held each January, the "Practical Tools and Solutions for Sustaining Family Farms Conference" is a forum where farmers can learn about sustainable farming techniques and marketing strategies, community food systems, federal policies, and more.
- *Resources*: The Southern SAWG webpage (<http://www.ssawg.org/>) offers resources to farmers including videos for farmers *by* farmers about ways to sustainably manage operations.

Georgia Department of Agriculture

- *General resources*: The Georgia Department of Agriculture website (<http://agr.georgia.gov/home.aspx>) offers resources on food production, food safety regulations and certifications, farm marketing, farm industry news, and inspection services for Georgia farmers.
- *Georgia Grown*: For as little as \$100 per year Georgia farmers may join the Georgia Grown program to receive use of the Georgia Grown logo, discounts on Georgia Grown events (including a farmers market showcase, Summerfest, and culinary series), a searchable customized profile on the Georgia Grown website, and free publicity through articles about Georgia Grown and Georgia agriculture. More expensive membership packages offer additional customized marketing including custom PR, statewide press releases, and discounts on financial transactions through WorldPay.

National Resources:

- *ATTRA*: The National Sustainable Agriculture Information Service website offers an entire database of resources and information for organizations interested in developing local food systems. Visit their website at: https://attra.ncat.org/attra-pub/local_food/
- *National Farm to School Network*: The National Farm to School Network is the go-to resource for everything you need to know about farm to school programming from funding opportunities, to policies and legislation, to curricular resources. To learn more visit: <http://www.farmtoschool.org/>