

Virginia Whole Farm Planning:

An Educational Program for Farm Startup and Development

VIRGINIA
Beginning Farmer & Rancher
COALITION PROGRAM

Marketing

The *Marketing* module is designed to help beginning farmers and ranchers develop and implement their goals for market analysis, product establishment, and development of viable marketing channels.

The module includes concepts, worksheets, and case study examples to help you assess your potential customers, product options, available markets, and dynamic marketing strategies.

This is one of five modules designed to guide you in developing the whole farm plan by focusing on the following areas:

- Introduction to Whole Farm Planning
- Marketing
- Whole Farm Business Management and Planning
- Land Acquisition and Tenure
- Sustainable Farming Practices

Each module is organized at the introductory to intermediate stage of farming knowledge and experience. At the end of each module, additional resources and Virginia service provider contact information are available to help continue the farm planning process.



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Preface

Welcome to the Virginia Beginning Farmer and Rancher Coalition Project's Whole Farm Planning Curriculum!

How to use this Workbook. This material is organized into five modules that may be used as stand-alone resources to address specific areas of whole farm planning. However, we suggest that the modules may be most beneficial to beginning farmers and ranchers if they are used as a series of educational sessions designed to encourage reflection, goal setting, and steps to organize a new farming enterprise.

Advice for Beginning Farmers. We encourage you to begin by exploring the Introduction to Whole Farm Planning module. This resource will offer you the opportunity to examine your personal and business goals and priorities. Once you have completed this introduction module, you are welcome to explore the other resources in a sequence that best addresses your questions and ideas for your farming enterprise.

Advice for Service Providers. Thank you for choosing to use our curriculum in your whole farm planning educational program. As an experienced education service provider, we encourage you to adapt these resources to best serve the needs of people you work with. The materials are intended to be used as stand-alone pieces or in various combinations of instructional formats, as needed by your program participants.

Modules. Each module is organized at the introductory to intermediate stage of farming knowledge and experience. At the end of each module, additional resources and Virginia service provider contact information are available to help continue the farm planning process.

Module I. Introduction to Whole Farm Planning – The purpose of the first module is to help beginning farmers and ranchers in Virginia make informed farm planning decisions by introducing them to the whole farm planning process.

Module II. Marketing – The marketing module is designed to help beginning farmers and ranchers develop and implement their goals for market analysis, product establishment, and development of viable marketing channels.

Module III. Whole Farm Business Management – In this module, you will develop and implement early financial and resource management goals as part of the whole farm plan.

Module IV. Land Acquisition and Tenure – This module will help beginning farmers and ranchers to develop and implement farm tenure and transfer goals as part of the whole farm plan. Established farmers who are planning for the transfer of their farm may also find this module useful.

Module V. Sustainable Farming Practices – The last module is designed to help beginning farmers and ranchers develop and hone their skills and knowledge in the fundamental production practices associated with establishing and growing a wide range of plants and animals. This module is divided into five sections, each focused on specific aspects of production agriculture: 1. The Place and the Products; 2. Farm Biodiversity; 3. Organisms in the Ecosystem: Beneficials, Pests and Diseases; 4. Soil Management; 5. Animal Husbandry.

Why this Curriculum? The Beginning Farmer Situation

Emerging trends in U.S. agriculture suggest that in order to enhance our agricultural resource base, we need to establish, sustain, and preserve our farms, farmers, and farmland. A growing number of nongovernmental groups, cooperative extension services, and U.S. Department of Agriculture agencies are working to improve the viability of new farms and the economic, social, and environmental fabric in which they are entrenched (Niewolny and Lillard 2010). These initiatives are responding to the overwhelming concern about the steady decline in the number of individuals entering into agriculture, coupled with an increase in the number of exiting farmers and ranchers (Ruhf 2001).

The current population of beginning farmers and ranchers is diverse and varies by location across the nation (Ahearn and Newton 2009). Beginning farmers on average operate smaller farms — in size and gross dollars — compared to established farmers (Ahearn, Yee, and Korb 2005). While beginning farmers tend to be younger than established farmers, about a third of beginning farmers are at least 55 years of age or older (Ahearn and Newton 2009). Beginning farmers, along with limited-resource and socially disadvantaged farmers, make up at least 40 percent of all U.S. farms (Nickerson and Hand 2009).

The Bureau of Labor Statistics (U.S. Department of Labor 2009) recently reported a large job decline for farmers and ranchers and projects an 8 percent decrease in the number of farmers and ranchers between 2008 and 2018. The age distribution of today's farmers and ranchers is also a critical issue. According to the "2007 Census of Agriculture" (USDA-NASS 2009a), the average age of a principal farmer is 57 years old. More than 63 percent of all established farms in 2007 were headed by a principal farmer age 55 or older; only 5 percent of all principal farmers were 35 or younger (Ahearn and Newton 2009). The aging population of U.S. farmers and ranchers is expected to increase by the next census while the number of young farmers is likely to decline.

The 2007 Virginia census also illustrates a significant need to establish and retain beginning farmers and ranchers based on the economic structuring of the industry. Agriculture provides \$55 billion in income per year and about 357,000 jobs, making it an important industry for the commonwealth. Of the 47,383 farms in Virginia, 92 percent reported less than \$100,000 in

sales, while 8 percent of the total farms accounted for 85 percent of total farm sales (USDA-NASS 2009b).

Virginia is also among the most expensive states for farmland, making it difficult for aspiring agriculturists to purchase suitable acreage. The average farm comprises 171 acres, while 77 percent of the total farms in Virginia operate on fewer than 180 acres (USDA-NASS 2009b).

Little is known about the 13,206 principal farmers in Virginia who have been on their current farms or ranches for nine or fewer years. The majority of all farmers in Virginia are white males, though the number of minority farmers such as women and African Americans is on the rise (USDA-NASS 2009b). Production crops and practices differ regionally and culturally, especially between rural and urban centers. Consumer demand for local and regional food, however, is growing at an increasing rate throughout Virginia.

Background on the USDA Beginning Farmer Rancher Development Program (BFRDP)

Beginning farmer education for adult and young audiences in the United States can be generally traced back to the advent of the 1862 and 1890 Morrill Land Grant Acts. But for the first time, the Food, Conservation, and Energy Act of 2008 (the 2008 Farm Bill), appropriated \$75 million for fiscal year 2009 to fiscal year 2012 to develop and offer education, training, outreach, and mentoring programs to enhance the sustainability of the next generation of farmers.

The reasons for the renewed interest in beginning farmer and rancher programs are:

- The rising average age of U.S. farmers.
- The 8 percent projected decrease in the number of farmers and ranchers between 2008 and 2018.
- The growing recognition that new programs are needed to address the needs of the next generation of beginning farmers and ranchers.

According to the 2008 Farm Bill, a beginning farm is considered one that is operated by one or more operators who have 10 or fewer years of experience operating a farm or ranch. In 2007, approximately 21 percent of family farms met that definition.

Since its inception, BFRDP has funded many projects to train, educate, and provide outreach and technical assistance to beginning farmers on one or more of the following topics:

- Production and management strategies to enhance land stewardship by beginning farmers and ranchers.
- Business management and decision support strategies that enhance the financial viability of beginning farmers and ranchers.

- Marketing strategies that enhance the competitiveness of beginning farmers and ranchers.
- Legal strategies that assist beginning farmers with farm or land acquisition and transfer.
- Other priority topics to enhance competitiveness and sustainability of beginning farmers and ranchers for the next generation.

Background on the Virginia Beginning Farmer and Rancher Coalition Project

The Virginia Beginning Farmer and Rancher Coalition Program aims to improve opportunities for beginning farmers and ranchers to establish and sustain viable agricultural operations in Virginia through the development and enhancement of whole farm planning programs, online resources, and farmer mentoring networks.

Beginning Farmer Audience

This curriculum is aimed at addressing the needs of the spectrum of beginning farmers and ranchers in Virginia. We recognize a diversity of farming experiences, backgrounds, and aims held by Virginia's beginning farmers and ranchers. Many groups find it useful to look at the stages of commitment, decision-making, and skills that farmers pass through as they begin a career in farming. Drawing on the work of Sheils (2004), the following categories are a helpful guide to understanding this pathway.

Prospective or explorer farmers – Individuals interested in starting a farm or ranch. This includes next-generation farm family members as well as those who do not come from a farming background.

Startup farmers – Individuals who are in the early stages of their agricultural operation, often within the first one to three years of farming or ranching.

Re-strategizing farmers – Farmers who are making changes to their operations after farming for approximately four to seven years. These individuals usually have increased decision-making responsibility and commitment to farming.

Establishing farmers – Farmers who are expanding, diversifying, and stabilizing within years eight to 10 of the beginning farmer period.

Transitioning farmers – Individuals who are family farm members who have decision-making roles on the farm without having primary farm operator status.

These categories of farmers are a modification of those referred to by the New England Small Farm Institute. For the full reference, see "What Does the Term 'Farmer' Mean?" (Sheils 2004).

Preface written by Kim Niewolny and Matt Benson, Department of Agricultural and Extension Education, Virginia Tech.

Acknowledgements

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Organizational Members of the Virginia Beginning Farmer and Rancher Coalition

The Virginia Beginning Farmer and Rancher Coalition comprises innovative farm businesses and organizations from across the Commonwealth. These include:

AgrAbility Virginia
Agricultural Development, Fauquier County
Appalachian Sustainable Development
Attimo Winery
Bracketts Farm
Farm Service Agency, U.S. Department of Agriculture
Fauquier Education Farm
Grayson LandCare
Hethwood Market
Laurel Farm
Local Food Hub
Mountain View Farm and Vineyard
Natural Resource Conservation Service, U.S. Department of Agriculture
Piedmont Environmental Council
Rural Development, U.S. Department of Agriculture
SustainFloyd
Virginia Association for Biological Farming
Virginia Cooperative Extension
Virginia Department of Agriculture and Consumer Services
Virginia Farm Bureau Young Farmers
Virginia Farm Credit
Virginia Forage and Grasslands Council
Virginia State University
Virginia Team Ag Ed
Virginia Tech
VT Earthworks
Young Farmers of Virginia

Steering Committee

The Steering Committee consists of seven committed individuals from the Coalition who represent both farmer and service provider perspectives in Virginia. This elected committee is responsible for guiding project activity to best address the expressed needs of the Coalition.

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Management Team

The Project Management Team is housed at Virginia Tech. This team is primarily responsible for the management and evaluation of project activity.

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The Virginia Beginning Farmer and Rancher Coalition Program is a collaborative effort represented by a range of beginning farmer stakeholders across the Commonwealth of Virginia. It is housed in Virginia Tech's Department of Agricultural and Extension Education. Funding is sponsored by the Beginning Farmer and Rancher Development Program (BFRDP) of the USDA-National Institute of Food and Agriculture (NIFA), Award # 2010-49400. To find more resources and programs for beginning farmers and ranchers please visit www.Start2Farm.gov, a component of the Beginning Farmer and Rancher Development Program. Contact Kim Niewolny, Program Director, at niewolny@vt.edu or 540-231-5784, for more information.





www.vabeginningfarmer.org



Marketing Table of Contents

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Unit 2: Examples of Beginning Farm Marketing Outlets

Unit 3: Writing Your Marketing Plan

Unit 4: Completion of a Marketing Plan

Glossary

References

Introduction to Marketing Module

This module is supported by publically available resources that bring together and strengthen opportunities for Virginia farmers' opportunities to market their products including:

Teaching Direct Marketing and Small Farm Viability, UCSC Farm and Garden Apprenticeship, Center for Agroecology & Sustainable food Systems, University of CA, Santa Cruz.

Objectives of this module include:

Assess where you are:

In the *Introduction to Whole Farm Planning* Module (Worksheet 7) you began this discussion that included your inventory and goals. Reflecting on your responses, does your previous discussion of the marketing component of your plan still accurately represent your whole farm plan?

Assess where you want to be:

What are your particular questions in regard to planning your market strategy?

What do you need to get there?

Marketing Concepts Overview

Case Studies

Writing your Marketing Plan

Portfolio Pieces Developed in this Module

Marketing Plan

Logo

Business Card

Promotional Brochure

Marketing

Unit 1: Marketing Concepts Overview

1.1 Understanding the Meaning of Marketing

Before you begin marketing, you must understand the meaning of marketing and what it will mean to you and your venture.

Facilitate discussions among students using Worksheet 1.1; perhaps divide class into groups according to current “market” of interest.

1.2 Marketing Options

There are several markets in which products can be sold. It is imperative to properly match all of a farm’s resources with the intended market. Remember from the *Introduction to Whole Farm Planning* module that a farmer’s personality, talents, and skills are part of a farm’s resources and should be factored in, as well.

A very simple breakdown of markets includes retail and wholesale. Many small farm operations use a combination of these two markets.

Discuss all possible markets for farmers, as presented in Worksheet 1.2. Note the advantages and disadvantages of each market place using Market Analysis/Marketing Plan Worksheet (p. 31, CA) as a guide. Within groups, students should discuss their market choices and why these choices fit their business model. (Students considering regional markets can use the REGION section of Market Analysis/Marketing Plan worksheet to explore their specific markets.)

Teaching Approach: Some students may change their minds at this point, and that is perfectly okay!

1.3 Targeting Your Customers

Once the students have determined their target markets, use worksheet 1.3 to stimulate their thinking about their customers. Worksheet 1.31, Individual Customer Profile, will identify direct customer profiles, while worksheet 1.32 will identify Business (wholesale) customer profiles.

Teaching & Learning Tools

1.1 Understanding the Meaning of Marketing

Resource:

Worksheet 1.1:
Understanding the Meaning of Marketing

1.2 Marketing Options

Resources:

Read Marketing Fresh Vegetables Fact Sheet 453, University of Maryland Cooperative Extension, <http://extension.umd.edu/publications/pdfs/fs453.pdf>

Read CA Unit 4.2 CSA Structure and Organization, Unit 5.1 Farmers Markets and Roadside Farm Stands, and Unit 5.2 Collaborative Marketing Groups and Agricultural Cooperatives

Worksheet 1.2: What marketing options do I have?

1.3 Targeting Your Customers

Customers

Resources:

Worksheet 1.3: Who in the world am I marketing to?

Worksheet 1.31: Individual Customer Profile

Worksheet 1.32: Business Customer Profile

1.4 Spotting Market Trends

Now that the students have thought through local markets and potential customers, they should explore market trends. Worksheet 1.4 is a good homework assignment for students to explore unique opportunities to market their products. At a minimum, students should complete STEP2 and make price, packaging, and product observations for use with crop planning activities in the *Sustainable Farming Practices* module.

1.5 Identifying Your Competition

Continue examining the market place by evaluating competition. No one benefits when all vendors sell the same product and go head-to-head in price competition. Use this activity to make observations about market opportunities (Areas of Opportunity, last row on worksheet) that may be areas on which students can capitalize.

1.6 Understanding the 4Ps: Product, Price, Promotion, & Placement

At this point, students should be very familiar with the market place. They have explored wholesale and retail market opportunities, identified and profiled potential customers, researched market trends, evaluated competition, and hopefully identified a few opportunities not previously recognized. It is now time to focus on the individual business idea. Use worksheet I.6, "The Recipe for Success: The 4Ps of Marketing," to explore and lay preliminary market plans for the business.

Teaching Approach: Students should brainstorm ideas for their business in each P area (Product, Price, Promotion, and Place). Include these brainstorming ideas in their class notebook or journal.

Teaching & Learning Tools

1.4 Spotting Market Trends

Resource:

Worksheet 1.4: How do I find market trends?

1.5 Identifying Your Competition

Resource:

Worksheet 1.5

1.6 Understanding the 4Ps

Resources:

Worksheet 1.6: The Recipe for Success: The 4Ps of Marketing

CA Worksheet p31: Market Analysis/Marketing Plan from California Resource

Appendix A: Marketing Plan Template

Unit 2: Examples of Beginning Farm Marketing Outlets

Students should review the web pages and business modules featured in this section. Use Part 2: Market Analysis/Marketing Plan/simple worksheet (p.31 of CA teaching guide) to draw conclusions from the activity.

Teaching Approach: Use this section to develop a PowerPoint that drives home section 1.2 (Marketing options). Use the activity to draw conclusions. Ultimately, at this point students should have a destination market!

Take time to review the following web pages to get marketing outlet ideas:

- 1 Farmers Market: Casselmonte Farm, Powhatan, VA
- 2 Community Supported Agriculture: Waterpenny Farm, Sperryville, VA
- 3 Agritourism: Chiles Peach Orchard, Crozet, VA
- 4 On-line Sales: Fall Line Farms, Richmond, VA
- 5 Auction: Shenandoah Valley Produce Auction, Dayton, VA:
- 6 Retail Outlet: Five Points Community Farm Market, Norfolk, VA \
- 7 Cooperative Marketing: Charlottesville Food Hub
- 8 Wholesale Marketing: Produce Source Partners
- 9 Farm to School

Teaching & Learning Tools

Unit 2 Marketing Outlet

Ideas:

Resources:

- 1 <http://www.casselmontefarm.com/>
- 2 <http://www.waterpennyfarm.com/index/>
- 3 <http://chilespeachorchard.com/>
- 4 <http://fif.luluslocalfood.com/>
and
<http://www.patchworkfarmsva.com/index.html>
- 5 <http://www.facebook.com/pages/Shenandoah-Valley-Produce-Auction/162391200451139>
- 6 <http://www.5ptsfarmmarket.org/home/>
- 7 <http://localfoodhub.org/>
- 8 <http://www.producesourcepartners.com/index.html>
- 9 <http://www.farmtoschool.org/state-programs.php?id=55>

Unit 3: Writing Your Marketing Plan

Students now have a general idea of what they want to sell, where, and how. Using the brainstorming session from 1.6, begin writing the marketing plan using the following supportive worksheets. As each section is fleshed out, it can be used to complete the corresponding section in Appendix A, Marketing Plan template.

3.1 Product Description

3.11 Further Product Assessment

Refer back to work in section 1E. Use competitive observations, notes about opportunity, to describe your product. A second worksheet, Further Product Assessment worksheet, will guide you through further defining your products.

3.2 Price Strategy

Think through how you will price your product. Look to your market analysis assignment for examples of price strategies used in the market place. Identify special occasions in which you might vary once your price strategies.

3.3 Pricing Considerations

Think through how you will price your product. Look to your market analysis assignment for examples of pricing considerations used in the market place. Identify special occasions in which you might vary once your pricing considerations.

3.4 Further Pricing Assessment

Finish your pricing work by thinking through these questions.

3.5 Place

How will you sell your product? Use Worksheet 5, Place Worksheet, to review market analysis notes for advantages and disadvantages, and potential costs associated with your strategies. Use Worksheet 3.51 Further Place Assessment, to make sure you have made good decisions for your business, farm, and product.

Teaching & Learning Tools

3.1 Product Description

Resources:

Worksheet 3.1: Production Description

Worksheet 3.11: Further Product Assessment

3.2 Price Strategy

Resource:

Worksheet 3.2: Price Strategy

3.3 Pricing Considerations

Resource:

Worksheet 3.3: Price Consideration

3.4 Further Pricing Assessment

Resource:

Worksheet 3.4: Further Pricing Assessment

3.5 Place

Resources:

Worksheet 3.5: Place

Worksheet 3.51: Further Place Assessment

3.6 Promotion

How will you promote your brands, your identity? Use your market analysis notes to see what is already being done in the market place. Are there opportunities for your business? Use Worksheets 3.6 and 3.61 to describe how you will promote your product and how competing products are promoted.

3.7 Resources for Marketing Your Farm Business

You may find it necessary to create resources for marketing your farm business. These resources may include a business card, a brochure, signature packaging, a website, or even a delivery truck. These resources promote your business and develop branding that customers will look for and associate with your business. These resources should have a cohesive look. Use these suggested articles and others from *Growing For Market* to familiarize students with various marketing resources and how they can impact a business' bottom line. Encourage students to begin developing basic resources, such as a business logo, business card, and promotional brochure.

- Managing your Brand – JSS Article/GFM 7/2010
- Your website is your best marketing tool GFM 4/1/2011
- Tweets, Twitter, FaceBook New Marketing Tools & How to use them GFM 6/1/2011
- Sell more at Farmers Markets GFM 7/1/2010
- Update Your Market Display GFM 9/1/2009

Teaching Approach: Hold an extra workshop with a local marketing expert to create these items. NOTE: If the student hires someone to create the logo and/or promotional tools, all of these self-assessment tools will be invaluable to the service provider for creating the best product possible.

Unit 4 Completion of a Marketing Plan

Utilizing the information, participants will review and complete the marketing plan template (Appendix A). Much of the marketing plan can be transferred from student's worksheets into the template.

Teaching & Learning Tools

3.6 Promotion

Resources:

Worksheet 3.6: Promotion

Worksheet 3.61: Further Promotion Assessment

Glossary of Terms

Wholesale: All transactions in which the purchaser is motivated by a profit or business motive in making the purchase, except for transactions that involve a small quantity of goods purchased from a retail establishment for business use, which is considered a retail purchase.

Retail: A set of business activities carried on to accomplishing the exchange of goods and services for purposes of personal, family, or household use, whether performed in a store or by some form of non-store selling. A retailer is a merchant middleman who is engaged primarily in selling to ultimate consumers. One retailer may operate a number of establishments.

Market Analysis: A regional and neighborhood study of economic, demographic and other factors made to determine supply and demand, market trends, and other factors important to leasing and operating a specific business.

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