

Community Shared Agriculture

Study Report



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Acknowledgements

Survey Participants

Our deepest thanks are reserved for the survey participants who generously gave their time and expertise to make this study possible. We are also very grateful to the focus group participants who provided additional feedback at the *Building Your CSA: Start-up, Development and Expansion* workshop in Red Deer in November 2013. We hope this work honours your input and helps support your community.

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Executive Summary

Introduction

A growing number of operators are meeting the challenge of marketing local food to Albertans through Community Supported Agriculture (CSA). CSA is a direct marketing channel by which farmers sell shares or subscriptions for farm products to consumers. CSA participants, both producers and consumers, share the risks and share the rewards in the production and consumption of fresh local food.

The CSA concept was developed overseas in the 1960s and is only now gaining popularity in all regions of Canada with over 400 CSAs Canada wide and approximately 40 CSAs operating in Alberta. CSAs are not generally well known to Alberta consumers. A recent survey of alternative agriculture in Alberta suggested that there were three times as many potential new customers as there were current CSA customers. This suggests large growth potential for CSAs in Alberta, if they can retain their current customer base and attract others who are interested.

CSAs in Alberta provide a wide range of vegetables, as well as fruit, eggs, meat and value-added products. Many CSAs also add value by providing pesticide free, free range or certified organic products.

Methodology

The research involved three primary components: a literature review, a survey of CSA operators and a focus group workshop to validate research findings.

The literature review is found in Appendix A.

This study was tasked with surveying CSA operations in Alberta to compare the business models, pricing structure and performance of CSA operations, including detailed information about membership turnover, reasons for growth, marketing and production risk, business longevity, and market diversification.

Survey questions were developed to provide a profile of CSA farmers and operations, and to address marketing, production, management and profitability. The questions were approved by

the Freedom of Information and Protection of Privacy Coordinator (see Appendix B for a list of survey questions and survey materials supplied to respondents).

A broad search provided 44 names of potential CSA operators in Alberta. Of these, 25 operators were interviewed.

Data from Alberta CSA operators were coded and tallied to provide the statistical analyzes. Additional comments provided by the respondents added to the rich detail of the study.

A focus group of approximately 25 people was held in conjunction with a CSA workshop that took place in November 2013 in Red Deer. These people provided confirmation of the information collected in the survey process.

Survey Results

Production

Although CSAs have been operating in Alberta for at least two decades, more than 80 per cent of our respondents have been in operation as CSAs for less than five years. About half (54%) of the CSA operators grew up on a farm. Most CSA operations (72%) sell only what they produce on their own farm; some supplement their CSA shares with products from other local farms, often those of family members; very few partner with other farms.

CSAs use, on average, eight acres for vegetable production (median 5), but frequently have a larger land base. The majority are located near Edmonton or Calgary, though there are CSAs in rural and northern Alberta as well. Some operators identified cold storage, field equipment and washing facilities as key components of their infrastructure.

The vast majority (96%) of Alberta CSAs provide vegetables. Some CSAs also provide fruit, eggs and, to a lesser extent, honey, bedding plants, value-added meat products, value-added vegetable products, and grains. Typically, CSAs offer 14 to 16 items each week at peak season, most often in a pre-set package.

A majority of CSAs run seasonally, frequently for approximately 15 weeks, starting at the beginning of July and running to Thanksgiving in early October. A minority extend the fresh vegetable season with winter storage vegetables. Meat CSAs tend to have fewer deliveries, sometimes only once or twice a year. Operations that supplemented their own products with other suppliers' products or added value to their products are able to run year round.

The most common payment plan is a subscription period with a down payment in early spring, and the remainder due at first delivery. Other payment options range from weekly payments to a debit account where customers maintain a minimum balance in an account with the producer.

CSA size ranges from fewer than 20 to more than 250 customers or shares. Perceived ideal size also varies, from eight to 500, with an average of 126 and a median of 88. Nearly equal numbers of

respondents feel that ideal size was a) less than 50, b) between 70 and 150, and c) more than 200. Barriers to growth include limited access to labour and capital and low consumer demand.

Many CSAs offer more than a single size of share – often they offer a full share suitable for a family of four, and a half share suitable for a couple.

CSA operators discussed their goals in operating a CSA. In initiating the CSA, they had hoped for improved cash flow, shared risk, and a direct relationship with consumers. Nearly 60 per cent of respondents indicated the CSA supplements other income; 40 per cent intended the CSA to provide a full income for themselves or their family.

Production planning is based on member feedback, producer experience and climate considerations. Many operators use some form of season extension and some provide additional non-produce items. Accessing labour, limitations of weather, access to capital and unsure land tenure are their main production challenges.

Marketing

The factors most commonly considered when planning a CSA include establishing appropriate delivery sites in appropriate service areas and offering shares at acceptable prices.

Few operators have a comprehensive marketing plan or a formal business plan. Those that do found value in that form of planning.

Operators track their business finances most commonly on Excel spreadsheets, though some used Quickbooks, Simply Accounting and pen on paper.

Most operators (70%) deliver their products to distribution hubs. These include farmers' market stands, church or community parking lots, retail locations, etc. A few deliver to customer homes (16%). The majority also encourage on-farm pick-ups.

Communication with customers is typically through face-to-face discussions at the time of delivery, through regular emails, newsletters and social media. Operators may provide recipes and farm events such as potlucks and work bees. Operators reach potential customers mainly through word-of-mouth from their current customers. Most operators survey their customers, but many find that surveys are less effective than face-to-face contact.

Many CSA operators also pursue other market channels, such as farmers' markets, restaurants, retail, u-pick or farm gate. Nearly half of respondents intend to diversify further, especially by diversifying the CSA share.

Pricing

Share prices are often set by the marketplace, other CSAs and local farmers' markets. Prices have average and median values just over \$600 for a full share and \$350 for a half share. This is roughly \$40 to \$50 per week for a full share or \$20 to \$30 per week for a half share.

Management

Labour requirements for CSAs are satisfied in just over half of the operations (56%). Farm families are often a major component of the work force, as are hired locals (often students), foreign workers, volunteers, and members. On average, operations have seven full time equivalent (FTE) employees for the growing season (median of four FTE). On average, labour is estimated at 33 per cent of the cost of production (median 35%, range from 22% to 75%).

Most CSA operators use contracts that specify the shared risk. Only a quarter of CSA operators have a refund policy.

Profitability

Some CSAs are stand-alone operations; some are part of a larger farm operation. Gross farm receipts range from less than \$10,000 to more than \$250,000 with CSAs accounting for 1 to 100 per cent of this amount. CSA gross revenues are higher with more shareholders: CSAs with 25 or fewer shareholders averaged \$22,000 in gross CSA revenue (median \$21,000); those with 30 to 135 members averaged \$64,000 (median \$30,000) and those with more than 250 shareholders averaged \$219,000 (median \$194,000). Most operators report their profit margin per share to be less than 20 per cent. Those with higher profits are in the middle ranges of gross CSA revenue.

Barriers to profitability are identified as access to effective labour, poor weather, lack of access to financing or land, and competing with cheap food in the marketplace.

Retention

Retention rates average 77 per cent (median 83%); renewals are believed by the CSA operators to be due to the quality of the product, the relationship with the grower and the convenience of the delivery. Non-renewal is most commonly explained by customers moving or finding the distribution inconvenient.

Desired programs

Producers report a desire for more consumer education about the benefits of CSAs, more business skills training, more production information and more networking opportunities.

Elements for success: farmer perspective

CSA operators suggested that it is crucial to: communicate with customers; manage labour effectively; grow slowly, perhaps with a pilot year; be innovative but careful; and provide quality products in good variety, in appropriate quantity (not too much).

Respondents are generally very positive about the future of local food, and of CSAs in particular.

The focus group confirmed that the summary survey information presented to them was consistent with their experience. Focus group participants identified key challenges such as the need to educate consumers, access labour, and deal with production challenges. They feel that success would be achieved by adopting online marketing tools, being located near urban populations, selecting times and places for distribution that are convenient for customers, and strengthening communication with customers.

Lessons learned from CSAs

Respondents indicated a number of lessons they learned through their CSA operations. The most commonly cited lessons were the need to communicate well with customers, explain what you offer clearly, be prepared to educate as often as needed, listen to customers and be responsive to customer concerns.

Respondents felt it is important to have enough labour, staff, members or volunteers for peak requirements. They also believed it is important to deal with labour fairly, and be responsive to the strengths of their staff.

Many felt it is important to grow slowly. Several advised doing a pilot year or obtaining farmers' market experience prior to launching a CSA. The need for more young farmers is also a common theme.

Other common themes include being innovative in the marketplace, and to plan carefully. Farmers advised new entrants to grow top quality products, give customers good variety, but not too much quantity, to use their intuition and think long-term.

Cross comparisons

Comparison of business models

The predominant model of Alberta CSAs is a single farm operation selling only what is produced on that farm. Most offer a pre-set share. These operations represent the simplest form of CSA.

A second model is a single farm that sells its own products, and supplements its shares with products from other farms. The additional items may be items that the CSA is short of, or they may

be different types of products, such as meat, eggs or specialty products. Choice or customization is a more important feature of this model than the first.

The third model is the collaborative CSA, where operators plan production together to supply a diversity of products year round. Selection of share options and products is greatest in this model. Agreements among partner operators tend to be verbal rather than written. This option offers the greatest diversity of products.

Comparison of pricing structures

Differences between the first and second models, i.e. between single farms that carry only their own products and those that supplement with products from other producers, are minor. The low sample size prevents us from examining the pricing structures of the collaborative model.

Comparison of performance

Retention rate, a reasonable measure of success from a member's perspective, was similar for the three business models. Gross revenue and profit margins were not conclusively different.

Key findings, policy issues and questions for future research

Key findings

Perhaps the most significant finding of this study is the variability of practices among CSAs. CSAs may provide vegetables, fruit, meat and/or eggs; they may provide local value-added products, and/or products as divergent as honey, flour, bedding plants, food storage items, doggie chews, pies, stress widgets and books. CSAs vary in the ways that consumers receive their products (including locations and packaging): in the ways they pay for products (annually, weekly, upfront, or invoiced after pick-up). CSAs vary in the level of choice (from none, to share size, variability among product categories, delivery dates and times, to shopping online). There is a general gradation from one model to another as producers find what works for them and for their customers.

Key factors include the location of delivery hubs, the amount of choice offered, the length of the growing season, the shortage and management of labour, the expression of core values, and the measurement of profitability.

Policy issues

Policy issues that impact CSA operators include quota regulations, especially for egg layers; and lack of access to hail insurance and capital for small scale operations. CSA operators would like to

see agricultural policy that favours small scale local producers, rather than being entirely focused on extensive export-oriented operations.

Questions for future research

Research is indicated as a priority, but local horticultural variety trials and demonstrations of efficient weeding machinery for small scale operations would be useful to meet their described needs. Research that focused on access to labour and capital could also be of use to CSA operators.



Photo credit: Prairie Gardens CSA Harvest Basket

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Community Shared Agriculture Study

Introduction

As demand for local food products increases in Alberta, so too do opportunities for producers and processors to market directly to Albertans. A growing number of operators are selling directly to Alberta consumers through Community Supported Agriculture, sometimes referred to as Community Shared Agriculture or even Consumer Supported Agriculture (CSA). This study will use the wording Community Shared Agriculture. CSA models vary from single farms selling shares or subscriptions for farm products that are supplied to consumers for a specified period of time, to a collective of farms and other agri-food operators (eg. bakeries, fisheries) working together to supply products to shareholders/subscribers year round. CSA participants – producers and consumers – share the risks and share the rewards in the production and consumption of fresh local food.

The CSA concept is gaining popularity and expanding in all regions of Canada to over 400 CSAs¹ Canada-wide, with approximately 40 CSAs operating in Alberta. While the recent report titled *Alternative Agricultural Markets in Alberta 2012* indicated that only two per cent of the 1,058 survey respondents claimed to participate in CSA/box programs (ARD 2013), 11 to 12 per cent of non-participants who had heard of CSAs indicated that they were interested. Alberta Agriculture and Rural Development (ARD) recognizes the growing interest and increasing farmer participation in CSAs. As such, ARD is supporting the development of information that can contribute to increased local food purchases through CSAs and has initiated this study to obtain detailed information on the factors contributing to the economic sustainability of CSAs.

History of CSAs Internationally

According to Henderson (2010), CSAs arose because "A century of "development" has broken the connection between people and the land where their food is grown and in many countries, north and south, a few decades of free trade have driven family-scale farms to the point of desperation. A long series of food scandals – illnesses from food-borne pathogens, milk and other products contaminated with GMOs and chemical pollutants – have led to a crisis of confidence in imported foods from industrial-scale farms. CSA offers a return to wholeness, health and economic viability."

¹ Although European and academic sources often refer to CSA in the singular, common usage seems to add an implied "operation", for instance "a CSA" or several CSAs. We will use the former when referring to the concept, and the latter when referring to the specific.

Japan

In Japan, CSA has been traced to the early 1960s, and to consumers (mothers and housewives), philosophers (notably Teruo Ichiraku) and farmers (such as Yoshinori Kaneko; Henderson 2010).

Consumer interest in Japan has been attributed to mothers who were concerned with methyl mercury poisoning (Perry and Franzblau 2010), concerned with the growing importation of food and loss of arable land (Fairshare nd) or concerned about the price of milk (IISD nd). These concerns mirror the complex reasons that lead people to consider closer alignment with farmers and which underpin the CSA movement today: obtaining clean, quality food, at affordable prices that are fair and sustainable for producers who use methods that are kind to the environment.

Yoshinori Kaneko is considered one of the Japanese pioneers of CSAs. He developed *Teikei* or “food with the farmer’s face on it,” implying a close partnership between consumer and farmer, and production without chemicals (Henderson 2010). *Seikatsu Clubs*, developed at about the same time, were locally organized cooperative networks that shortened the supply chain between producer and consumer.

Europe

At about the same time, a similar system was developing in Switzerland and Germany. Unaware of the Japanese model, these farmers claim inspiration from collective farms in Chile and the peasant worker movement in France (Henderson 2010). In their system, called *Voedselteams*, members pay for land rental and provide some of the work in exchange for a share of the production of the land.

North America

CSA began as a direct marketing channel in the USA in the mid-1980s, introduced by Jan Vendertuin and Trauger Groh, immigrants who had been involved with organic and biodynamic farms in Germany. Two different models developed. In the first, members paid a fixed price for a fixed weekly share. In the second, the members pledged an amount based on their ability to pay, and received a food portion that reflected their relative contribution.

In its beginnings, CSA had a strong environmental and social component, associated with organic and biodynamic production methods, with strong transparency in production practices, and with a focus on establishing an equitable relationship between farmer and consumer.

History of CSAs in Alberta

CSAs have operated in Alberta for two decades, but have run under most people’s radar until just recently. In our study, we found only three CSAs that have run for more than 10 years and are still operating today. These are in close proximity to large urban centres.

In 2012, the Government of Alberta estimated that there were 15 farms with CSA subscriptions in Alberta. At the end of 2013, the website www.csaalberta.com lists 24 (Gregoire, 2013).

Overview of CSAs

Global trends

Asia

Today the *Seikatsu* Clubs of Japan continue to grow and have become internationally recognized with a Right Livelihood Award (TRLA nd). They now have 600 groups supplying more than 22 million people (Fairshare nd). They provide about 3,000 products (Poirer nd) and have expanded their focus to include child and elder care, anti-GMO activism, reuse of packaging, carbon dioxide reduction, clean energy and political action (PRI nd).

Outside of Japan, but still in Asia, the CSA movement is less well known. Henderson (2010) noted that CSAs can be found in Malaysia, India, South Korea and China, but that they are relatively rare.

Europe

The Soil Association in the UK promotes CSAs with action guidance manuals and consumer promotions. These have caught on, and today the Soil Association lists 67 CSAs on its website. It advertises CSAs that provide vegetables, fruit, eggs, baked goods and a broad range of meat products. Some are run by individual farms, some by cooperatives and some as sheltered workshops for people with mental challenges.

Henderson (2010) indicates that CSAs (*AMAPs – Associations pour le Maintien d’une Agriculture Paysanne*) have “spread like wildfire” in France, and now number in the several thousands. Urgenci (2013) notes that CSAs are well established in France, Germany, Austria and the UK; but they are only in a fledgling stage in Hungary, the Czech Republic, Slovakia and Greece. Urgenci has begun a project, “CSA for Europe!”, that aims to promote CSAs and share best practices throughout Europe.

United States

CSA farms in the USA total 8,500, serving hundreds of thousands of families (McFadden, 2013). CSAs vary from large gardens supporting a handful of people to large operations such as Honey Brook Organic Farm in New Jersey with over 3,000 shares and employing many migrant workers (Flora and Bregendahl 2012). Most CSA projects are organic or biodynamic; in 1999, Brown and Miller (2008) found 94 per cent to 96 per cent used organic methods.

In Michigan, the Food and Farming Network (2007) estimated that approximately 20 to 30 shares can be supported per acre of production. Shares tended to range between \$15 and \$40 per week. For every 30 shares, one worker is required, but 80 to 100 shares may be needed to provide full time income. In central California, Galt et al (2012) found that CSA farmers tend to be relatively young, more often female, white, and well educated than the general farming population. Median farm size was 20 acres with six acres devoted to the CSA. Median membership was 60.

Canada

Canada is home to over 400 CSAs, with the largest number in central Canada. In 2011, Ontario had approximately 200 CSAs, with 8000 shares, generating \$7.3 million. Roughly 28 per cent of those surveyed identified their products as certified organic; two-thirds reported growth in the number of shares from 2010 to 2011.

In Quebec, there were an estimated 110 CSA farmers in 2012, generating sales of \$5 million. Approximately 90 per cent of CSAs (or ASCs, *Agriculture soutenue par la communauté*) are certified organic, the majority of which are in the *Equiterre* network (MacKinnon 2013). According to MacKinnon, *Equiterre* has 78 CSA operations with 10,500 shares and \$4 million in revenue. In 2010, Henderson reported that *Equiterre* had over 100 farms participating in CSAs and 33,000 members (an estimate of the number of people consuming the products, not the number of shares; St-Germain 2013).

According to a 2013 report by the Atlantic Certified Organic Regional Network, there are approximately 50 CSAs operating in the Atlantic Provinces (certified organic and non-certified CSAs). Extrapolations from the data provided in the survey suggest that revenue of \$1.4 million was generated by the 50 CSAs serving over 2,940 households in the Atlantic region.

MacKinnon (2013) estimated the number of CSAs in British Columbia at 40, based on the 33 reported on the Farm Folk City Folk's website in 2012. There were 49 listed on this site in 2013. Of the CSAs surveyed by MacKinnon, approximately half were certified organic. MacKinnon estimates the 40 CSA operators generated revenues of \$1.2 million in 2012.

We found no studies of CSAs in the prairie provinces. A quick Google search found 25 CSAs in Alberta, six in Saskatchewan, 17 in Manitoba, and one in the Yukon. These provide minimal estimates, as CSA numbers are most likely under-represented on Google. The Government of Alberta estimated in 2012 that there were 15 farms with CSA subscriptions in Alberta. At the end of 2013, the website www.csaalberta.com lists 24 (Gregoire, 2013).

Trends in Alberta

Demand

The Alberta Agriculture and Rural Development report, *Alternative Agriculture Markets in Alberta* (ARD 2013) indicates that 46 per cent of Albertans have not heard of CSAs or box programs. Only 16 per cent know ‘a lot’ or ‘something’ about CSA/box programs. Only two per cent belong to CSAs or purchased food boxes. This consumer study suggests that potential for market expansion exists for CSAs, but that creating awareness is a significant challenge. In this study, potential new purchasers exceeded the number of current purchasers by approximately three fold. These potential customers had not heard of CSAs, but were interested simply from having heard them described in the survey. This suggests tremendous potential if consumer awareness can be achieved. However, the consumer study also indicates that 40 per cent of current customers are unlikely to renew their subscriptions. A large potential market and a high degree of dissatisfaction suggest that the market has yet to sort itself out.

Although numbers were small in the quoted study (ARD 2013), there appears to be a trend in demographics, with the greatest number of purchases by people 18 to 44 years old and by older families. Purchases were greatest by middle income households (\$80K to \$120K) living near Edmonton. Purchasers were frequently married couples with university degrees.

Types of Production

Most CSAs focus on vegetables and this is true in Alberta as well. Those advertising on the website www.csaalberta.com indicate a wide range of horticultural production, including potatoes, peas, beans, carrots, cucumbers, greens, onions, squash, peppers, tomatoes, cole crops and corn. They also advertise fruit such as pumpkins, melons, cherries, apples, saskatoons, raspberries, strawberries and a variety of herbs.

Some CSA shares include meat such as beef, pork, chicken, turkey, duck, geese and guinea fowl. Some have sausages, jerky and other processed products. Many have eggs. Some also include bedding plants, flowers, baked goods, and preserves in low seasons.

Most CSAs have some sort of production promise based on environmental and health values: organic, pesticide free, chemical free, antibiotic free, artificial feed supplement free, GMO free, grass fed, free range, pastured, bio-intensive, according to permaculture principles, etc. Some operators make no ‘values’ claims.

Methodology

Our research involves three primary components: a literature review, a survey of CSA operators, and a focus group workshop to validate key survey findings.

Literature Review

The literature review can be found in Appendix A (p. 48-67).

Survey of CSA operators

This study was tasked with surveying CSA operations in Alberta to compare the business models, price structure and performance of CSA operations, including detailed information about membership turnover, reasons for growth, marketing and production risk, business longevity, and market diversification. Critical success factors for CSA producers were determined based on the discussion of, but not limited to, the following:

1. Assess production planning and experience with season extension.
2. Analyze market potential before developing a CSA.
3. Develop a marketing plan to reach the target market.
4. Estimate the cost of labour.
5. Determine how to price a CSA share.
6. Secure financing.
7. Develop payment policies.
8. Develop a membership agreement limiting the producer's potential liability, including product and landowner liability, as well as a description of refund policies.
9. Determine when and where shares can be picked up by, or delivered to, customers.
10. Decide on the use of technology for record keeping and accounting.
11. Understand and navigate the regulations impacting CSA operations.
12. Manage and expand the scale of production for profitable returns.

Questions were designed to meet the main research priorities:

1. General description of farmer, farm & CSA operation (to set the context and to develop a profile of CSA operators, including social aspects such as goals)
2. Marketing planning process – starting from identifying the opportunities and analyzing the marketing potential to the entire marketing plan (marketing objectives and strategies for each of the marketing elements – i.e. product/product mix/packaging, price, place/distribution, promotion/outreach, customer relations)
3. Production planning and season extension
4. Management (labour, contracts, regulations)
5. Profitability and financial stability

The questions and accessory information, such as informed consent forms, were approved by Alberta Agriculture and Rural Development as meeting the terms of the Freedom of Information and Protection of Privacy Act. See Appendix B.

We cast a broad net in seeking CSA operators. A valuable source of information was the Community Supported Agriculture in Alberta website (www.csaalberta.com) developed by Anita Gregoire. Using this website, conducting additional online searches and asking questions of ARD staff and CSA operators, we developed a list of 44 operations to contact. Out of the 44, we interviewed 25 operators between October 8 and November 6, 2013.

Most of the survey questions were open-ended. These questions asked for 'top of mind' responses. Answers were coded by the apparent themes presented. The number of operators who expressed each theme was tallied. A single operator could, and often did, express several themes.

Farmer identifiers were removed from the dataset. In the text that follows, farmers are identified solely by number, e.g. Farmer 1.

For some questions, respondents were prompted. For instance, they were asked to identify the factors which they considered when planning their CSA from a list of factors provided. Answers to these questions were also tallied. Again, operators could and often did choose several options within a single menu of choices.

The responses given to 'top of mind' and prompted questions differ. For instance, many respondents indicated initially that they really didn't consider any factors in their planning. When prompted, they decided that yes, probably many of those factors were in their minds at the time. A respondent may select an item on a prompted list, but not mention it when not prompted.

Not all operators answered all questions. For instance, some chose not to share information on profit margin. Some questions did not apply to all participants. For instance, season extension techniques such as row covers and hoop houses applied only to fruit and vegetable production, not to meat CSAs. The number of responses are indicated, such that "n=" refers to the number of respondents for a given question. Summary data are frequently expressed as percentages of the respondents to each question.

Sometimes respondents gave answers that appeared to conflict with their previous answers. For instance, an operator might not mention having a greenhouse when asked about infrastructure, but mention it when asked about season extension. Similarly, they might suggest that all products in their CSA are from their own production, but later mention that they supplement with a neighbour's product. These apparent contradictions arise, in part from 'top of mind' answers being incomplete, and because different questions evoke different images to the operators. Perhaps, for instance, the greenhouse is used for transplants (season extension) but not for full season

products. Perhaps the CSA share only includes a producer's own products, but other producers' products are also offered for sale at the distribution hub.

Focus group

The ARD initiative, Explore Local, partnered with Organic Alberta to host a workshop entitled *Building Your CSA: Start-up, Development and Expansion* on November 14, 2013, in Red Deer. A focus group was conducted with about 25 participants following the workshop. Preliminary data were presented from the survey. When asked if this data felt true to their experience, there were initially few comments. When prompted further, some people suggested that it was good to know that their experience was within the range of situations discussed. This suggests that the data were true to their experience.

People were invited to participate in two breakout groups to give further input on their key challenges and key factors for success. They were prompted with the results given by the survey participants.



Photo credit: Noble Gardens

Research Findings

Research results are summarized below.

Production

Producers

Producers were asked about their farming experience. Over half (54%) grew up on a farm. These farmers averaged 19 years of farm experience (median also 19; beyond their “growing up”). They averaged 10 years of farm direct marketing experience (median 7), and five years of CSA experience (median 2). Farmers that came to farming in adulthood averaged 13 years of farm experience (median 12), six years of farm direct marketing (median 5), and four years of CSA experience (median 4). See also Tables 1 to 4.

CSA management is a relatively new project for most farmers. More than 80 per cent had been running their CSA for less than five years.

“CSAs are new in the hinterland.” – Farmer 1

CSAs tend to be single farm operations. Seventy-two per cent reported that they sold only the production of their own farm. Twenty per cent indicated that they supplemented their shares with items such as honey or eggs that they obtain off-farm (usually from a family member); sometimes these are offered as part of the share (usually eggs) and sometimes they are available for purchase separately. Few CSA operators indicated that the CSA was a partnership between them and other farms.

“We used to be a sole supplier, and grew everything ourselves; now we are in discussions with other producers to minimize the risk.” – Farmer 16

Land Base

Most farms are in close approximation to, or even within, a major centre: 10 near Edmonton and nine near Calgary. Other CSAs are in more remote areas, either near small urban centres or in rural regions. Four are in the north.

The amount of arable land managed by the CSA operators averages 260 acres (median 140 acres). One CSA includes grazing land for cattle. Leaving that CSA out as an outlier, the rest of the CSAs average eight acres in vegetable production (median 5 acres; range less than one acre, to 30 acres). See also Table 5.

Crops

Ninety-six per cent of CSA operators surveyed provide vegetables. Most indicate that they grow any vegetable that is appropriate to their region, though some specialized in greens or in heritage varieties.

“I can’t think of much we don’t grow.” – Farmer 20

Only one operator does not provide vegetables; this CSA is meat only.

Fruit is provided by 40 per cent of CSAs. Most of these provide strawberries and/or raspberries. Others options include cherries, melons and other fruits.

Meat is provided by 36 per cent of CSAs. A wide diversity of meat is produced, including beef, pork, all manner of poultry, and lamb.

Eggs are provided as part of the share by 16 per cent of CSAs. Other specialty products include bedding plants, value-added vegetable products such as salsas, value-added meat products such as sausage, honey and grain.

Infrastructure

When asked for a general description of their infrastructure, 64 per cent of respondents mentioned cold storage facilities; 48 per cent mentioned field equipment and 40 per cent mentioned wash facilities. This suggests cold storage is a primary concern. The survey was conducted in the fall when field equipment may not have been top of mind, as seed bed preparation and planting were long over. Wash facilities may also be used by more people than those who mentioned them, but there are some CSAs that make a point of presenting products as unwashed, due to poor water quality, or to extend shelf life.

Of secondary importance, 24 per cent of producers mention a greenhouse, and 20 per cent mention a barn. These facilities are probably not common to all producers. Other items mentioned by at least one respondent included: frozen storage, irrigation, mechanical weeders, high tunnels, butchery, and a commercial kitchen. These are likely to be more specialty components, but could be key to increasing profitability.

Seasonality

A majority of respondents (68%) report that their CSAs operate seasonally; eight per cent include a winter CSA as well as a seasonal CSA. Sixteen per cent run year round, and eight per cent have single or very few deliveries per year.

Seasonal CSAs tend to start deliveries at about the first week of July and continue either to a set date or until the season is curtailed by weather. Seasonal CSAs run 10 to 17 weeks; half of these run for 14 or 15 weeks. See also Figure 1.

Subscriptions

Most respondents (68%) indicated that they have a single sign up time, often in the winter or early spring. A further 20 per cent have different sign up times for different seasonal packages. The remaining 20 per cent were open for subscriptions at any time.

The number of shareholders/subscribers per CSA varied tremendously, from six to over 1,000, with an average of 263 (median 40). There were reasonably similar numbers of very small (less than 20 subscribers), small (20 to 40 subscribers), medium (approximately 100 subscribers) and large (more than 250 subscribers) CSAs. See also Figure 2.

There appears to be no consensus on the size of shares. Most respondents suggest a full share is suitable for a family of four or a vegetarian couple; a half share is suitable for a couple. Of 22 respondents that offer shares, 55 per cent offer both full and half shares (41% offer only full shares; 5% offer only half shares).

“If individuals want to share a share they can do that themselves.” – Farmer 24

Those CSAs that offer both share sizes range from those that sell mostly half shares (32% of respondents), to those that sell mostly full shares (18%). One respondent indicated that a ‘condo’ share (essentially a quarter share) is the minimum option, designed for seniors.

In the first year of operation, CSA subscriptions varied from four to 150, with an average of 31 (median of 15). More than 80 per cent of these grew rapidly, doubling or more than doubling annually.

“It took on a life of its own.” – Farmer 18

“There has always been greater demand than what we wanted.” – Farmer 24

CSA operators differ on their perception of optimal CSA size for their particular situation. They suggest a range that extends from eight to 500 shares or customers, with an average of 126 (median 88). Nearly equal numbers feel that ideal size was a) less than 50, b) between 70 and 150, and c) more than 200.

Interestingly, 39 per cent of respondents suggest the optimal size for their CSA is roughly the size of their current CSA. Fifty-nine per cent would need to grow to reach their optimal share number.

Intent

Survey participants were asked why they decided to develop a CSA. This was a ‘top of mind’ question, without prompts. Four answers were given more often than any other (at 44%, 36%, 36% and 36%): improved cash flow (as the shareholder pays up front); shared the risks (especially with unpredictable weather); created a direct relationship with customers; and saw a business opportunity. These answers suggest that the CSA model itself was what attracted most producers.

“People [customers] help us with cash flow; we’ll do what makes them happy.” – Farmer 2

Less common reasons to start a CSA include: it seemed simple or right (24%); providing quality food (8%); providing local food (8%); consumers asked us to do this (8%); to improve upon the CSA model (8%); to educate consumers (4%); environmental reasons (4%); the challenge (4%); it was better than the farmers’ market (4%); and to have known volumes of what needs to be produced for the season (4%).

Participants were asked where they receive their marketing planning information. The most frequent answer (24%) was that they already know what they needed to know. Respondents also talk with friends (16%), and consider farmers’ markets (12%) and other CSAs (12%). A few (12%) talk with consultants. See also Figure 3.

Respondents were also asked about their financial goals for their CSA. Only 40 per cent intended the CSA to provide a full income. Fifty-six per cent indicated that their CSAs supplemented their income, either because they have other farm income, or off-farm employment. Nearly half (44%) indicated that their CSA was a community service, and four per cent claimed it is a lifestyle decision.

Planning production

CSA operators plan their production based on member feedback (64%), experience (45%) and climate (32%). Other factors include being swayed by seed catalogues, finding unique offerings, and the recommendations of staff at the Crop Diversification Centre North.

Season extension is used by 76 per cent of operators. Greenhouses were most common, either to start transplants, or for season long production. Other techniques include the use of succession planting, row covers, transplants, high tunnels, hoops and mulch. See also Table 6.

In addition to produce, some CSAs offer eggs (40%), meat (16%) or flowers, herbs, honey, flour, food storage products, baked goods, jams, or jellies. Non-produce items are frequently the products of the farm (28%) or family members (12%); only 20 per cent of CSA operators source goods outside the farm/family.

CSA operators were asked about their production or expansion challenges. Their most common concern is accessing appropriate labour (29%), limitations of weather (24%), access to capital (19%), and unsure land tenure (14%). See also Figure 4.

Marketing

Planning

In this section we told producers that we were going to read a list of different factors and ask if they used any of these as part of their planning process when they were developing the idea of a CSA. Several people (28%) replied that they really did not go through any formal planning process. With further prompting (i.e. reading the list), they identified a number of factors that were considered, at least on some levels.

The factors that achieved the highest scores include establishing appropriate delivery sites in appropriate service areas and offering shares at acceptable prices. See also Table 7.

Identifying target customers, promoting appropriately, differentiating from the competition and providing the right product mix are the next most important factors noted by respondents.

“The ideal, most promising customer is a mother with kids; they are willing to buy good food.” – Farmer 21.

“Homeschoolers are a key customer. They are community-minded and focused on providing the best food and learning experience for their children.” – Farmer 9

Only 20 per cent of respondents indicate that they develop a comprehensive marketing plan; a third have a business plan. Business plans are revisited annually (44% of respondents with a business plan); every quarter (11%); or as needed, according to expansion plans, market changes or financial changes (33%). Those that value their business plan suggest that it brings “a lot more clarity”, allows us to “see where we need to work, and what we are working towards”, and gives them a lot of confidence in their operational management.

Excel is the most commonly used accounting tool (36%), followed by Quickbooks (24%), Simply Accounting (16%), pen and paper (16%) and “it’s all in my head” (8%). CSA specialty software, such as Farmigo and Small Farm Central, are rarely used. Accounting tools are chosen because they are familiar, work well, and align with the bookkeeper/accountant. Those who use Farmigo and Small Farm Central were emphatic that they were life changing. However, at the November ‘Build your CSA’ workshop, these programs were described in less favourable terms.

“We used Daniel Brisbois’ spreadsheet for planning². It extrapolates to each week and backtracks for all the seeding and transplanting.” – Farmer 20

² Theriault, F. and D. Brisebois. 2010. Crop Planning for Organic Vegetable Growers. COG Practical Skills Handbook series, Canadian Organic Growers

Shares

Alberta CSAs vary, from those who offer a single meat product, to those that offer 1,000 items in an online catalogue. Alberta CSAs more typically offer 14 to 16 items. See also Figure 5.

Eighty-eight per cent of respondents indicate that they provide a pre-set box. Most pack boxes for customers. Some (20%) encourage a level of choice – e.g. the customer picks a pre-set number of items from each category, such as one bag of carrots selected from a number of carrot varieties, one cabbage of any size. Some (8%) have sharing baskets, for people who don't want some items in their basket. Some (8%) offer additional items.

The remaining 12% of respondents fill orders received online.

A variety of containers are used to package the CSA shares. A third of CSA respondents have customers use their own bags. Twenty-four per cent use plastic bags, 19% use Rubbermaid totes or an equivalent product; 10 per cent use cardboard boxes. Remaining operations use paper bags, reusable bags, and vacuum packaging (for meat).

A majority (64%) of respondents indicated that all products sold through the CSA are produced on their farms.

“There are many people to partner with once you open your mind to it.” – Farmer 5

Twenty-eight per cent sell other local farmers' products as well as their own; eight per cent facilitate the purchase of other farmers' products by connecting these farmers with their customers (e.g. a vegetable CSA operator may welcome a meat producer to sell at the CSA distribution point). Only four per cent claim to be in a partnership arrangement with other producers. Often relationships are familial or informal.

Distribution

More than 70 per cent of CSAs deliver their goods to distribution hubs where customers meet them to acquire their shares. These shares may be pre-packaged or presented buffet style (customers select items from totes). Most also encourage on-farm pick-up. Sixteen per cent of the respondents to this survey offer a home delivery program. See also Figure 6.

Typically, shares are delivered weekly (76%) or biweekly (20%). Some deliver less often; some deliver twice a week at peak times.

Communication

In addition to one-on-one conversations at delivery points, most CSAs have other forms of communication with customers, such as regular emails or newsletters included in the share. One uses Mail Chimp to generate e-newsletters and manage emails. Email is considered the most

effective, followed by direct face-to-face contact, and social media such as Facebook or Twitter. See also Figure 7.

The most effective way of communicating or promoting to potential customers is word-of-mouth, from existing customers (68%). Some found Facebook effective to find new customers; a few advertise in community papers to reach new customers. See also Figure 8.

“We don’t need to have promotions; we have a story.” – Farmer 2

When asked what services they offer customers, a majority (59%) mention including recipes, especially with unfamiliar vegetables. Events such as pot lucks and barbecues, sometimes combined with work bees, are also offered (by 41% of respondents). Some mention that these are not well attended, but for some CSAs they provide an integral sense of community. Many found running the events challenging and disappointing when they are poorly attended. In total, 56 per cent of respondents open their farms to members and potential members in some manner.

Evaluating customer satisfaction is important. Many CSA operators conduct surveys, either online (57%) or on paper (9%). A further 35 per cent seek feedback while face-to-face at deliveries; 13 per cent request feedback in their email newsletters.

Survey response rates vary tremendously; however, the act of doing a survey may be as important as the results:

The survey is “more to keep people involved, but you know exactly what they’re going to say.” – Farmer 20

Pricing structure

Share prices

According to survey respondents, share prices are most commonly based on the marketplace (74%), on what other CSAs are charging, or what an equivalent basket of goods will bring at the local farmers’ market. Other factors include the willingness of customers to pay, and the ability to provide a return to the farmer at a given price.

The average price for a full share is \$605 (median \$612; ranging from \$280 to \$755); the average price for a half share is \$343 (median \$347; ranging from \$300 to \$392). For vegetable boxes, weekly prices tend to be between \$40 and \$50 for full shares and \$25 to \$30 for half shares. See also Figure 9.

Share fees are typically paid before delivery begins – often a deposit is paid in late winter, with the remainder paid at roughly the time of first delivery. All CSAs accept cheques, most (79%) accept cash; other options were less popular – electronic email transfer (46%), or online payment options such as Paypal (33%).

Just over half of respondents offer payment options. Work shares, either required or optional, can reduce the overall price (9% of respondents). Staggered payments, such as weekly or monthly, are available in some CSAs. Only 39 per cent offer an incentive to resubscribe, such as a percentage or dollar discount or an additional week free. Only 13 per cent offer a discount for early payment.

Management

Labour

Many farmers have difficulty estimating the labour on their farms. This is compounded by differences in seasonality, in the nature of the labour – own, family, volunteer, member, and paid. Their estimates of labour on their CSAs vary from one (the operator) to 55, with an average of seven FTE for the season (median 4 FTE). Fifty-six per cent of respondents indicate that they have labour sufficient to meet their needs.

Farm families are often integral to the farm labour, with older members acting as management, and younger members weeding, picking, packing, etc. One respondent mentions that “family members get harder jobs.”

Labour is often sourced locally (48%), though some CSAs use foreign workers (12%). For some CSAs, workers “found us” (16%) and come as apprentices or through programs such as WWOOF (Willing Workers on Organic Farms). A further four per cent have shareholders who work on the farm.

In some operations, “everyone does everything” while in other operations, staff, and especially volunteer labour, are coordinated with an eye to their preferences, and the need to keep the experience positive. Monitoring labour can be done by the family, or by the field manager.

CSA operators vary in their ability to estimate labour costs:

“I can’t even begin to figure this out.” – Farmer 19

“One student for each 20 shares.” – Farmer 1

Estimating labour needs is frequently based on the operator’s previous experience (24%), the available revenue divided by the going rate for farm labour (\$10 to \$15 per hour depending on experience and work ethic), the expected work load and sometimes a formula of workers needed per share (1 employee per 20 or 30 shares).

“I time myself doing something and just extrapolate from there.” – Farmer 5

Respondents estimate labour costs at 22 per cent to 75 per cent of their cost of production. The average is 33 per cent (median of 35%; n=16, as several were unable to estimate this component).

Contracts

Membership agreements, or contracts, are used by 76 per cent of the CSA respondents. These are used to educate consumers and include reinforcing the 'shared risk, shared reward' model, some specifically mentioning the risk of hail, promising to provide the best products that the farmer can manage under the environmental conditions that occur. Some contracts give expected share contents; some emphasize the importance of washing products; some state that if shares are not picked up at the hub, they will be given to the food bank; some detail expected work contributions; and some producers commit to production standards such as 'no pesticides.' Contract templates are readily available in specialty software and online. Some CSAs do not use contracts and rely simply on trust.

CSA operators were asked if they had formal agreements or contracts with other farmers or colleagues who supplied products for their CSAs. They are unanimous in their rejection of this model of doing business.

"A contract is only as good as your ability to enforce it. It's better to have a meeting of the minds." – Farmer 18

Few CSAs (24%) have a formal refund policy. Most find that this is not a problem. Some indicate they refund money as needed for people who quit, but this is rarely needed. One producer indicated that a refund is given at the producer's initiative:

"I did call some customers and tell them this is not for you, here's your money back." – Farmer 22

Profitability

Gross farm receipts vary among CSA operators, from less than \$10,000 to more than \$250,000. Part of this difference is the difference between farmers who operate only a small scale operation and those who also operate a large mixed farm. See also Figure 10.

Farm direct sales account for 82 per cent of gross farm receipts on average (range 1% to 100%; with 78% of respondents reporting 100% of gross farm receipts are from direct sales). CSAs account for 53 per cent of gross farm receipts, on average (median of 60%, range 1% to 100%; 43% of respondents have less than 50% of gross farm receipts from the CSA; 30% respondents have more than 75% of gross farm receipts from the CSA).

CSA gross revenue is higher with more shareholders: CSAs with 25 or fewer shareholders average \$22,000 in gross CSA revenue (median \$21,000); those with 30 to 135 members average \$64,000 in gross CSA revenue (median \$30,000); and those with more than 250 shareholders average \$219,000 in gross CSA revenue (median \$194,000).

For most operators (67%), their profit margin per share is less than 20 per cent (range from '0 to 20%' to '80 to 100%'). Those who report higher profit margins are in the middle ranges of gross

CSA revenue. It is important to note that many farmers do not include a salary for themselves or their family members in their numbers, while others do. This discrepancy makes comparisons between operations and business models weak. See Figure 11.

Barriers to profitability vary among CSA operators. The most common issues reported are difficulty in finding quality labour (28%), impacts of weather on crop production (20%), lack of access to financing (16%), lack of access to land (12%), and competition from cheap food in the marketplace (12%). See also Figure 12.

Thirty-eight per cent of respondents report their CSA operations are financially self-sustaining through their membership – i.e. share fees covered all expenses. This may be limited to operating expenses, not considering land and equipment that was owned by the CSA operator prior to the CSA. A further 25 per cent indicate that the CSA is financed from personal funds, and 17 per cent indicated that they include the CSA under their operating loan for the farm. An additional eight per cent have an agricultural loan, eight per cent have a loan from family and four per cent have a bank loan. None of the bank/agricultural loans are solely for the CSA.

Retention Rate

Retention rates are estimated by respondents as 50 per cent to 100 per cent, with an average of 77 per cent (median 83%).

CSA operators report multiple reasons why members renew their membership year after year. These are primarily gleaned from the positive comments they receive at delivery. Most frequent responses include the quality of the product (43%), the relationship with the grower (43%) and the convenience of the delivery location (39%). See also Table 8.

“They believe in the type of farming we do.” – Farmer 24

“They like me.” – Farmer 21

CSA operators are less confident in identifying why members do not renew their membership. The most common answer they hear is that the member moves (64%). Other reasons include inconvenience (36%), too much food in the share, members being away too often, shares being too expensive, members growing their own garden. See also Table 9.

Sixty-four per cent of CSAs have a waiting list. Some respondents don't care about waiting lists, as there are always more customers “waiting in the wings.” One found that waiting lists do not provide eager customers.

Longevity

CSAs have been a feature of the agricultural landscape in Alberta for many years, with 12 per cent of respondents indicating that their CSA has run for 10 or more years. However, the number of CSAs has grown dramatically, and most CSAs are in their early years. Twenty-four

per cent of respondents indicate that their CSA had just completed its first season; 88 per cent of CSAs have existed for five or fewer years.

Market Diversification

Alternative market channels

Sixteen per cent of respondents market solely through their CSA. Other market channels include farmers' markets (32% of respondents), marketing to restaurants (24%) or retail (16%), u-pick (20%) or farm gate (20%). See also Figure 13.

Further diversification

Nearly half of the respondents (40%) intend to diversify further. Of these, 40 per cent (or 16% of all respondents) intend to add value-added products. Other options for diversification include partnering with other producers, developing a winter share, entering other market channels such as farmers' markets, or increasing the variety within the CSA share.

"The focus is to increase the value of each share by offering more to shareholders." – Farmer 24



Key Factors

Factors impacting growth and profitability

CSA operators identified three main factors that limit the growth of their operations: lack of access to effective labour (48%), lack of access to capital (33%) and low consumer demand (24%). Additional factors include lack of business skills, distance to market, climate and regulatory limitations. There is a great deal of overlap in the factors that limit growth, and those that limit profitability. See also Figure 14.

There were also some specific issues raised by the focus group in Red Deer: small acreages not being eligible for hail insurance, having limited access to irrigation and limited access to and high cost of equipment appropriate to small scale horticulture. This group also raised the issue that low consumer demand for CSAs may be due to consumer confusion and poor understanding of the concept and benefits of CSAs.

Key challenges and factors for success

Participants identify consumer education, lack of access to labour and production challenges such as weather as their key challenges. Other challenges include finding unique marketing strategies and accessing financing.

Factors that contributed to success include the use of online marketing tools, locating near an urban population, making pick-up convenient for customers, and communicating well with them.

CSA as a part of overall farm business

Those CSA operators with additional farm income identify a number of ways that the CSA impacted other aspects of the farm business. The CSA creates awareness of the farm and increases business at the farmers' market for 40 per cent of CSA operators. For 20 per cent of CSA operators, the time required to run the CSA leaves less time for other operations. Respondents also note that the CSA helps with cash flow, reduces the amount of produce going to waste, but also reduces profits by using up time.

Programs needed

Respondents identify four program or information types that would be useful to promote the growth of CSAs in Alberta (each suggested by 16% to 20% of respondents):

- Consumer education about CSAs and the benefits of local food as well as education about sustainable alternative farming systems, perhaps with comparisons to mainstream.
- Management and business skill training for CSA farmers, including marketing and business planning.

- Production information, such as that previously supplied by staff at the Crop Diversification Centre North; growing techniques, building soil health and vegetable variety trials.
- Workshops such as the one held in Red Deer (*Building Your CSA*), November 14, 2013.

Additional suggestions include: providing networking opportunities, helping producers move to a year round operation, providing [funding for] internships and developing incubator farms, education about the importance and benefits of local food, providing funding for processing, publicizing existing reports that are available and reducing regulations that apply to small scale operations.

Some producers indicate that they were fairly self-sufficient and do not need anything. A number of respondents mention their appreciation of government programs and initiatives, especially Explore Local. An equal number express a desire to not have government involved in programming. One respondent mentioned appreciation of the CSA Alberta website, and used it as an example of a helpful initiative.

Associations

CSA operators are members of many associations. Sixty-seven per cent are members of the Alberta Farm Fresh Producers Association.

Lessons

Respondents provide a number of lessons they had learned through their CSAs. See also Figure 15.

Communications

The most frequent response concerns the need to communicate well with customers.

“Be patient and diplomatic dealing with customers.” – Farmer 11

“We are managing the logistics of customer expectations. Have as much information as you can about what you offer.” – Farmer 20

“Make sure to listen to customers and be responsive to customers.” – Farmer 26

Labour

Manage labour and deal fairly with employees.

“Make sure you have enough people, especially when picking and packing shares.” – Farmer 3

“Originally we did everything; it’s hard to let go. Things go better when I’m not in the office.” – Farmer 18

Labour was the main factor that producers foresaw as a challenge in the future (Figure 16).

Starting and growing

Grow slowly, start with a pilot year.

“Over the years, we’ve mentored starting CSAs. We tell them start small, do a pilot project...do it well on a small scale and build from there.” – Farmer 25

Attract more CSA farmers.

We need to “change how the world views farmers and attract more youth into farming.” – Farmer 9

Start with farmers’ markets as a way to learn the ropes when getting into CSAs.

Innovation

Other lessons include finding market innovation, and planning carefully; think long term.

“Be light on your feet [so you can quickly respond to customer concerns].” – Farmer 15

The right stuff

Provide quality products, in good variety, in appropriate quantities (not too much).



Cross comparisons

Comparisons of CSA business models

In this section, we discuss the three main business models that exist in Alberta's CSA landscape. As noted earlier in the report, the majority of CSAs in Alberta are single farm operations that only sell products produced on their own farm (72% of survey respondents). As such, we consider this model as the predominate business model for CSAs in Alberta.

The second most popular CSA model in Alberta is the single farm CSA which supplements its offerings with products obtained from other farmers, based on informal arrangements between the farmers (20% of respondents).

The third model is the collaborative CSA model whereby the CSA is a more formal partnership arrangement between the farmers who plan their production together. Only eight per cent of the respondents in the survey participate in this model, but it is a worthy model to include in the comparison since it is distinct from the other two models, and can potentially provide benefits to producers and customers not realized by the first two models.

Since the sample size is low per business model, comparisons will be presented mostly as trends and in general terms, in order to preserve confidentiality and identity of respondents.

Single farm/own products

Not surprisingly, the majority of CSA operators using this business model in Alberta are vegetable/fruit CSAs. A small percentage also sells eggs and/or meat.

Their main reason for choosing this business model is that it is the simplest and easiest one to start up and suits their situation best. Most of these CSAs are relatively recent (median longevity two years), with some long time operators indicating that they have used this business model for 10 or more years.

As a group, the average number of shares per CSA is on the low end (average 84; median 30) but the range is quite dramatic – i.e. ranging from a small CSA of six customers/shares to a large CSA serving 485 customers/shares. All operators offer full shares; two thirds also offer half shares. Average length of season is 14 weeks (median 15) and the average number of items per share is 18 (median 14).

Simplicity is key for this group: 64 per cent offer a pre-set box; the remaining 36 per cent offer some modification or choice such as a trading box but customization is minimal. While all respondents offer on-farm pick-up, 22 per cent offer this as the only option; 64 per cent also deliver to a hub; 14 per cent deliver direct to home.

Fifty per cent of these operators provide opportunities to strengthen their relationships with their customers and community by offering work bees, running special events on the farm, or encouraging farm visits.

Single farm/own products plus other

All of the CSA operators using this business model sell vegetables and fruit from their farm, and supplement with other farmers' products when they were short on product, rather than passing on the loss of the shorted product to their customers. Half of these CSA operators also purchase non-produce items from other farmers – mainly eggs and/or meat, and a few specialty items (e.g. baked goods, honey, etc.).

Their main reason for choosing this business model is that it is a relatively simple model and it allows them to diversify their offerings, providing more choice for their customers, and support more local production. The average years of CSA longevity for this group is three years (median 3). Most started as a single farm/own products operation but rapidly moved into other offerings, responding to consumer feedback and differentiating their operation from competitors.

As a group, the number of shares per CSA is low. All operators offer full and half shares.

Providing consumer choice is relatively important for this group; a majority offer a box with some selection or add-ons, some offer full choice, the remainder have a pre-set box. All respondents offer on-farm pick-up, most also deliver to a hub and a few also provide some direct to home delivery.

Most operators strengthen customer and community relations by running special events, work bees, farm tours or by encouraging farm visits.

Collaborative CSAs

The few Collaborative CSAs (CCSAs) that exist in Alberta are amongst the largest CSAs. They are characterized by the strong collaborative relationships between the operators who plan production together to ensure that customers are offered a diversity of products year round – from vegetables, fruit, eggs and meat to value-added products. They offer shares customized in sizes and product categories and provide a selection of products in addition to standard boxes; some selections are greater than others. All CCSAs deliver to a distribution hub.

The business agreements between these Alberta operators tend to be verbal agreements, rather than written contracts, which affords them some flexibility but can also be a risk if business goes sideways. The average longevity of these CSA operations is four years, so they are still relatively new in the market place.

All of these operators strengthen customer and community relations by running special events, work bees, farm tours or farm/facility visits.

Comparison of CSA pricing structures

Pricing of CSA shares is not greatly different among the three business models.

Comparison of CSA performance

This section considers various performance indicators across the business models – from retention rate to sales and profit information, to growth and diversification intentions, and use of business plans to evaluate progress.

In each business model, the retention rate averages (and medians) were 70 per cent to 85 per cent, suggesting that customers were quite satisfied with their farmers, services and offerings.

Reported profit margins are difficult to compare, as some operators paid themselves a realistic salary, some took only minimum wage, and many did not pay themselves a salary at all. However, the single farm/own products and single farm/own products plus others models had similar reported profits – with a majority in the 0 per cent to 20 per cent category. Too few of those in the collaborative model shared their profit margin estimates with us to allow us to compare this model to the others.

Gross revenues for the CSAs were highly variable (more than 150 fold) within business models, making comparisons between models inconclusive. Gross revenues tended to increase with the customer base.

Single farm/own product

Farms with the single farm/own product business model tended to focus on simplicity. The majority of these CSA operators intend to increase the number of customers per share (80%) but only 40 per cent plan to diversify.

In terms of financial goals for this group, two thirds are running a CSA to supplement their family's income; the other third intend to support their family solely with the CSA.

Only 20 per cent of these CSA operators currently have a comprehensive business plan, although many intend to create one in the future.

Single farm/own products plus other

Most of these operators intend to grow their customer base/share numbers, with nearly half planning to diversify their operations.

A majority of this group wants the CSA to be their sole source of income; the remaining operators are running CSAs to supplement their family's income.

Only a few of these CSA operators currently have a comprehensive business plan, although many intend to create one in the future.

Collaborative CSA

All of these operators intend to grow their customer base/share numbers, and diversify their operations further. They all have created a comprehensive business plan which they revisit often to evaluate the performance of their operations.

Most of this group intends the CSA to be their sole source of income; the remaining operators are running CSAs to supplement their family's income.

Future of CSAs and local food systems: Farmer perspectives

Local food

Respondents are generally very positive about the future of local food. Seventy-eight per cent suggest that the local food movement will grow; only nine per cent suggest that its growth will be limited. Twenty-two per cent of respondents suggest that growth would be facilitated by ethical values such as pesticide-free, hormone-free, GMO-free, natural, heritage, or association with specific farmers.

CSAs

Respondents are also positive about the future of CSAs, indicating that they have massive potential (26%) or are a growing trend (39%). A further 17 per cent suggested that CSAs are an important niche market.

"I think there could be twice as many producers in the Calgary area." – Farmer 15

"I see it as a really positive, empowering model for farmer and community; you're connected, it's local, direct." – Farmer 21

Fewer respondents provide qualifications to the growth. Thirteen per cent suggest that CSAs have serious issues, e.g. being inflexible, lacking in choice and inconvenient, that need to be addressed before the CSA can move forward. Some respondents (9 per cent) feel that CSAs offer a model of sustainability for our food system. One respondent expresses concern that those who were not considering their CSAs as serious businesses were diluting its potential.

CSAs in other Canadian provinces

Institutional support

In Quebec and in Atlantic Canada, support is available for CSAs through member organizations.

Équiterre has been operating for 20 years as a non-profit membership-based organization providing information, education and promotional services for certified organic CSAs in Quebec. Équiterre has built a strong network of CSA operators, and partner farmers (suppliers to CSAs), and is focusing efforts on helping CSA members become more sustainable by increasing their customer base and number of shares. In 2014, Équiterre will provide a best practices manual and hands on training to their CSA members, a key deliverable from Équiterre's 2013 strategic plan.

Atlantic Certified Organic Regional Network (ACORN) has been representing and serving organic operators in the Atlantic Provinces since 2000. Over the past five years, ACORN has developed and delivered innovative programs to help support the growth of CSAs. For example, ACORN launched an on-line survey on the ACORN website encouraging CSA customers to provide feedback on their farmers, products and services. ACORN generates an annual CSA trend report to help inform and educate farmers on CSA models and provides each CSA operator with an individualized customer feedback report.

Support for CSAs in other provinces is minimal to non-existent.

Key findings, policy issues and questions for future research

Key findings

CSAs in Alberta are highly variable, with many differences within them. Not everything the survey participants told us made it into the statistics. They provided rich detail on the variants that made their operations unique.

“The beauty of the CSA is that you can transform it to work for you; there are so many ways you can tailor it to your business.” – Farmer 22

Importance of hub location

Convenience of pick-up location is seen as one of the factors leading to renewal of subscriptions. Inconvenience of pick-up is seen as one of the factors leading to nonrenewal. A visible and accessible location is an important factor. Some operators use home delivery to avoid the inconvenience factor. There are other options. Focus group members discussed the usefulness of selecting a hub based on the demographics of a community – finding wealthy neighbourhoods so that the target market is near the hub. One of the survey participants suggested partnering with local businesses, using bakeries and butcheries as drop offs. The boxes can be held until it is

convenient to the customer, and CSA customers generally bought additional items at the drop off location – a win-win situation.

Choice

The traditional pre-set package model of CSA offers very little choice. This is often seen as a problem and a number of producers address this in various ways. At the simplest, having a buffet style pick-up allows the producer to reduce packaging time, and provides the consumer the perception of choice. It may still be ‘pick one package of carrots and one cabbage’, but they can select the carrots and the cabbage that suit them. Producers can also avoid the perception of unfairness if produce sizes vary.

Choice increases if there is variation in products within a category – e.g. different varieties of greens, different types of carrots. Some CSAs offer trading bins, where consumers can ‘leave one, take one’ if perhaps they don’t like something on offer.

Some CSAs increase the choice available to consumers by having a set package, and a number of optional items to purchase separately. Some offer the option of selecting and paying for what they want. This can differ from a farmers’ market stand because the customer has a commitment to a minimum order and has often paid a lump sum in advance. However, this can evolve into an online store model.

Choice can also be offered in terms of delivery options – some CSAs offer direct-to-home delivery, perhaps at an additional fee relative to pick-up at a hub. Some offer choice in timing – customers can change among several delivery points, often on different days. Some CSAs allow some level of ‘time off for holidays’ so that the customer commits to a minimum number that is less than the total number of deliveries.

Seasonality

A number of producers questioned the sustainability of a seasonal model. They suggested farmers move to year round production, with storage vegetables and greenhouse products.

“How sustainable is a food system if they go elsewhere over the winter?” – Farmer 2

Labour

Labour is a concern from three perspectives: getting enough; getting quality; and using staff effectively. The shortage of labour is particularly challenging for farms located outside of urban centres, where transportation becomes an issue. Several respondents feel that difficulty accessing labour will increase, as many people are drawn away from agriculture, particularly by the oil and gas industry.

Quality labour is also a problem. Volunteer labour can be excellent, especially if these people were highly motivated (e.g. apprentices), but often volunteers and hired staff alike are not experienced and some farmers noted that their work ethic is not up to farm standard. Student labour can be very helpful (especially those from Olds College) but these people leave to go back to school at a time when much harvesting remains to be done. Use of foreign labour is seen as ideal by those farmers who use it. They find that the foreign workers are very efficient, have a strong work ethic, and are eager to stay past the start of school.

Managing labour is also seen as a challenge for some farmers. Part of this may be the result of farmer's perception that the staff lack a strong work ethic, but some also mention that they have always done this work, and it is hard to delegate it to others.

Innovation

A number of producers indicated that they see flaws in the traditional CSA model, and set about to fix them.

"We surveyed people doing CSAs, asked them what the problems were, then solved them." – Farmer 2

"[The] traditional model won't work because people are uber picky and prioritize service and flexibility over product. A barrier in CSA is paying in advance; we got rid of those [problems; you can] pay as you go and we made [it] as personalized as people want it to be." – Farmer 18

Innovation is also evident in financing. One producer told us about Slow Money, a program that matches investors with deserving farms that have 'the right stuff.'

Another innovation is to have corporate drop off locations. Groups that recruit 10 CSA members from their workplace can have their shares delivered to that workplace.

As CSAs are often based in part on customer values, philanthropy can play an important role. Several producers mention that if the customer is unable to pick up their share, it is taken to the food bank. Customers seem to be ok with this, even appreciating this use of food they cannot use (for instance, during their vacations). One producer mentioned a partnership with a church, which provides its parking lot as a distribution site, in return for a share that is raffled off for United Way. Another mentioned that shares are purchased by philanthropists to be given to needy families.

Other CSA operators acknowledge that they do considerable consumer education in their CSAs. Some also encourage the participation of children as a teaching tool.

Profit

Measuring profitability is a challenge. Many producers do not think in terms of profit. Those that did offer estimates of profitability that vary in whether or not they claim a salary. Some take profits

as salary, or reinvest in the business. Although this may be a common way of looking at farm profits, or indeed, the profits of any entrepreneurial enterprise, it makes comparisons very difficult, and potentially inaccurate.

Profits are not just about money. A number of operators told us that they do this for community goals such as feeding people healthy food, building food security, teaching people about where their food comes from, or the pure enjoyment of the CSA as a retirement project or hobby. In this way, CSAs seemed generally profitable. A few operators mentioned stress and excessive hours, and the need to scale back. Right sizing may be difficult when demand is strong.

“We did not have realistic expectations... we under estimated the number of hours, labour or family commitments, so it created undue stress.” – Farmer 1

Policy issues

Farmers generally did not mention policy issues, but a few bubbled to the surface:

- ✓ Increases in the limit on the number of birds (especially layers) before it was necessary to buy quota, or create an exemption category for farm direct marketers
- ✓ Access to hail insurance for small acres and horticultural growers, particularly of mixed crops
- ✓ Lending policies that did not discriminate against small acres of horticultural production
- ✓ Access to grant funds for processing that was not directly tied to a specific farm, to facilitate third party processing while allowing farmers to focus on what they are best at, without this as a distraction
- ✓ Local food policy from government that encouraged support and consumer education

Questions for future research

Producers did not ask for further research. However, one farmer suggested that the staff of the Crop Diversification Centre North are a source of very useful information.

Several producers felt the lack of efficient weeding machines. As appropriate scale equipment is often obtained from Europe, local testing and demonstration would probably be very helpful.

As producers raised issues about access to appropriate labour and capital, research on means of providing these effectively may be helpful.

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Tables

Table 1. Years of experience: All respondents (n=25)

	Average	Minimum	Maximum
Farm experience*	28	3	61
Direct marketing experience	9	1	40
CSA experience	4	1	24

*Farmers who claimed to “grow up” on the farm were arbitrarily assigned 20 years of general farming experience in addition to their recent experience

Table 2. Years of experience: Farmers that grew up on the farm (n=14)

	Average	Minimum	Maximum
Farm experience*	19	1	41
Direct marketing experience	10	1	40
CSA experience	5	1	24

*Not including experience of “growing up” on a farm

Table 3. Years of experience: Farmers that did NOT grow up on the farm (n=11)

	Average	Minimum	Maximum
Farm experience	13	3	33
Direct marketing experience	6	3	14
CSA experience	4	2	10

Table 4. Years of CSA experience: All respondents (n=25)

Years of CSA	Number of respondents
1	6
2	3
3	6
4	6
5	1
10 or more	3

Table 5. Land base (n=25)

	Calgary area	Edmonton area	Other urban or North
Arable land (ac)	304	218	262
CSA land (ac)	8	10	8*
Number of respondents	9	10	6

*Excluding one meat CSA with grazing

Table 6. Use of season extension techniques by CSA operators (n=21)

Technique	Number of respondents
Greenhouse	15
Succession planting	9
Row covers	8
Transplants	8
High tunnels	7
Hoops	6
Mulch	4

Table 7. Factors considered when planning a CSA (n=25)

Factor	Number of respondents
Delivery sites	21
Acceptable price	19
Service area	19
Target customer	17
Product mix	17
Competition	17
Promotion needed	16
Regulations	15
Number of potential customers	13
Likely number of shares sold	11
Marketplace need	10
Promotion costs	9
Number of members to break even	8
Did a market plan	5

Table 8. Reasons for renewing a CSA subscription (given by CSA operators; n=23)

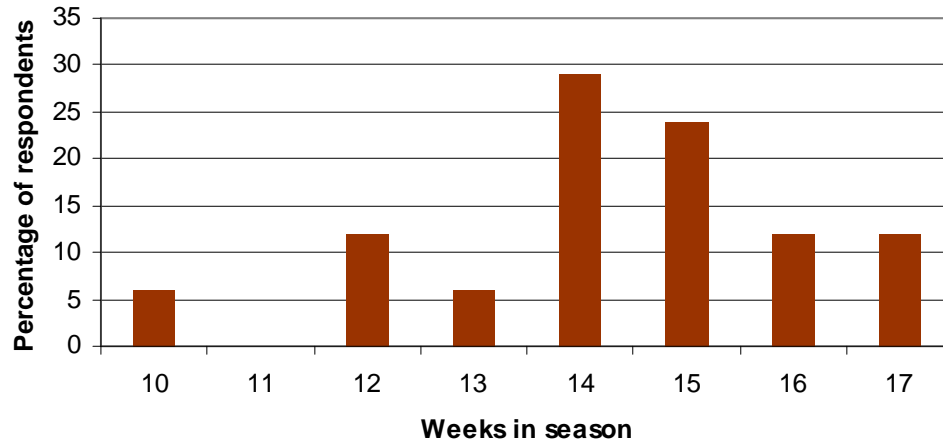
Factor	Number of respondents
Quality of food	10
Relationship with grower	10
Convenience	9
Value	7
Agreement with philosophical principles	7
Freshness of products	5
Variety of products	3
Local	2

Table 9. Reasons for NOT renewing a CSA subscription (given by CSA operators; n=22)

Factor	Number of respondents
Move away	14
Inconvenience	8
Too much in share	6
Away too often	5
Price	5
Grow own garden	5
Insects in produce	3
CSA didn't suit them	3
Less than previous years	2
Unfamiliar with some vegetables	1
Died	1
Found another farmer	1

Figures

**Figure 1. Length of season for seasonal CSAs
(n=17)**



**Figure 2. Number of shareholders / subscribers per
CSA (n=25)**

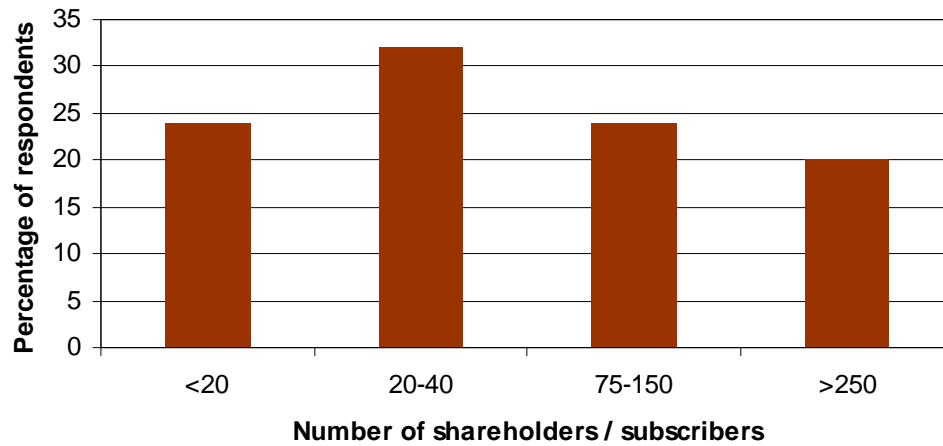


Figure 3. Sources of knowledge used in planning a CSA (n=25)

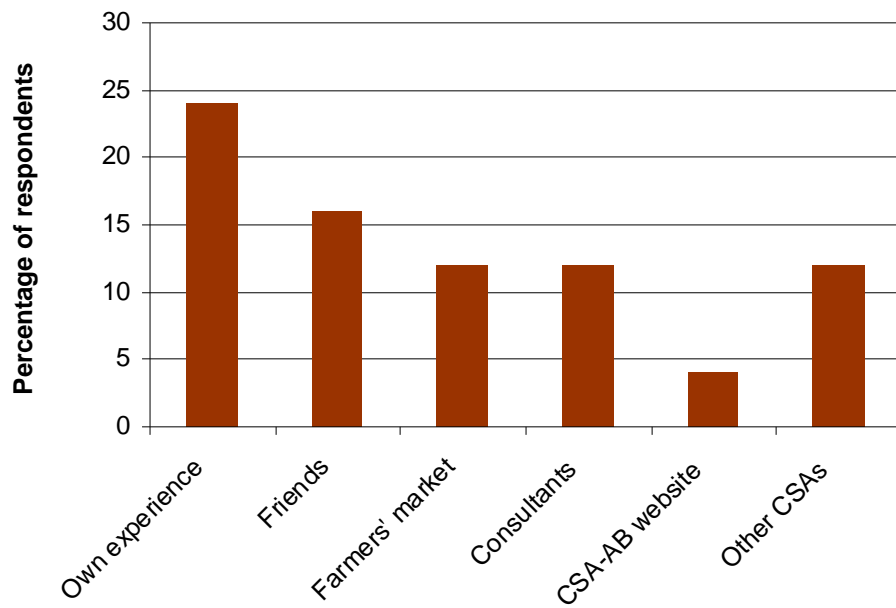


Figure 4. Challenges for production or expansion (n=21)

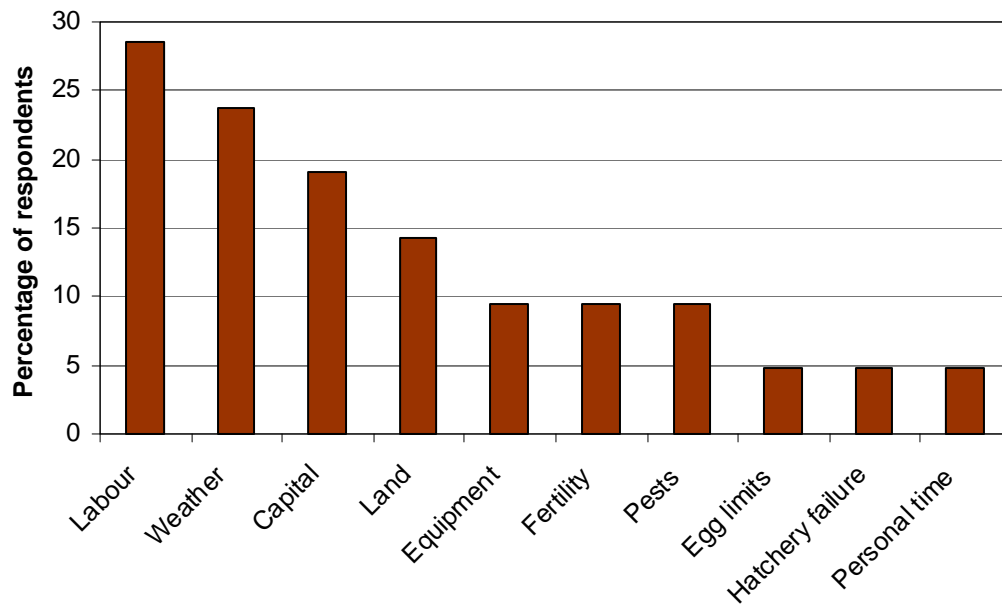


Figure 5. Number of items per share at peak season (n=25)

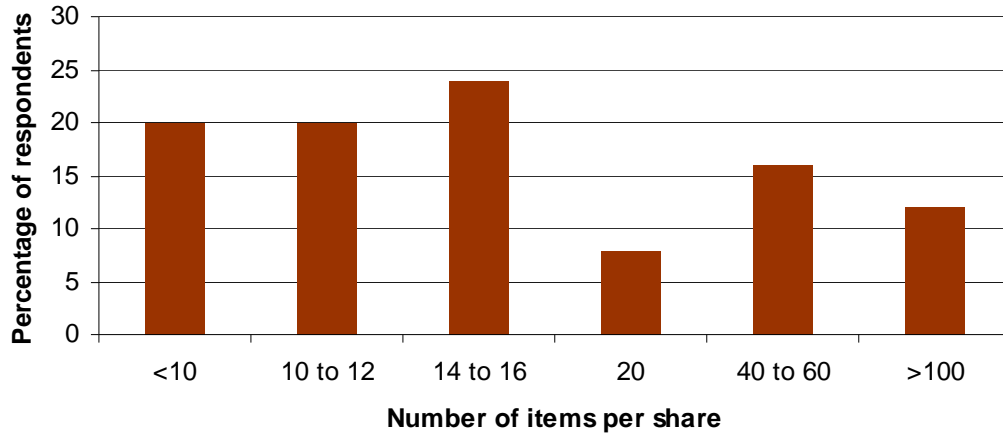


Figure 6. Location where CSA share is picked up or delivered (n=25)

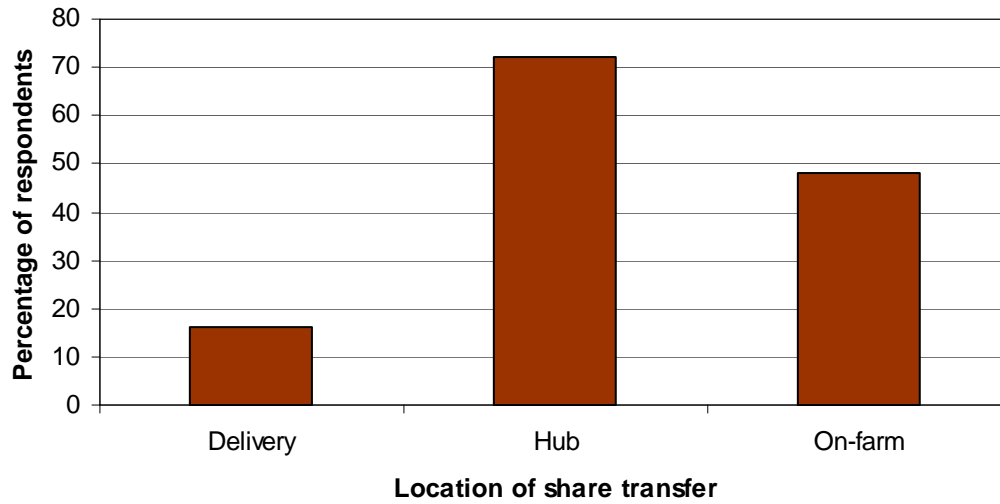


Figure 7. Means of communicating with existing customers (n=25*)

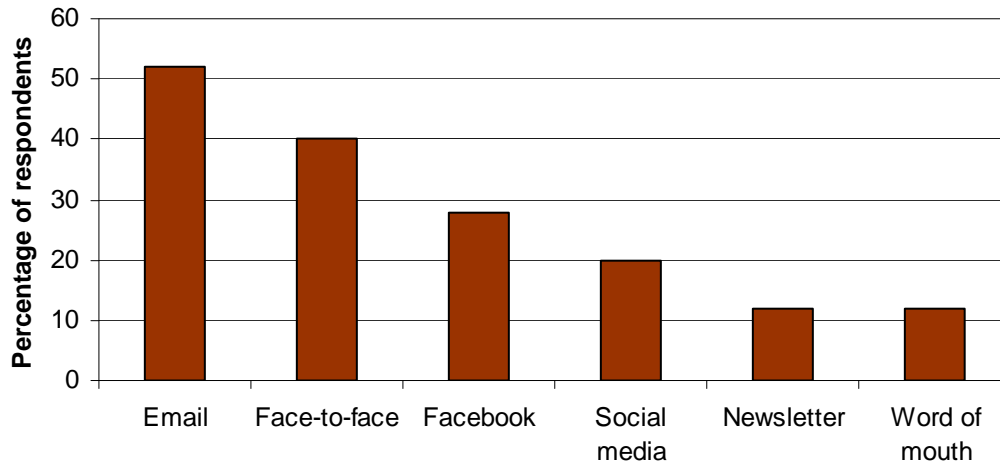
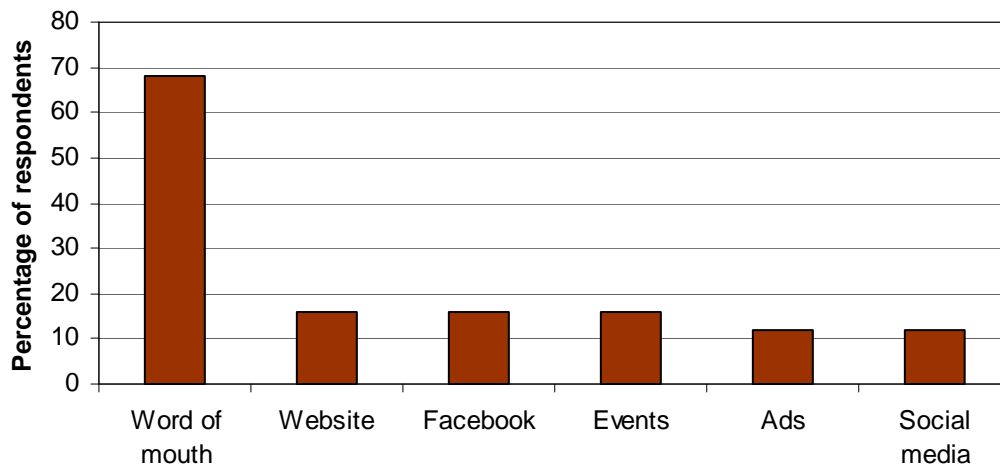


Figure 8. Means of communicating with potential customers (n=25*)



*Respondents could select up to three “most effective”

**In this context, word-of-mouth communication with existing customers would imply talk within the community of CSA members.

Figure 9. Average annual price of a full CSA share (n=22)

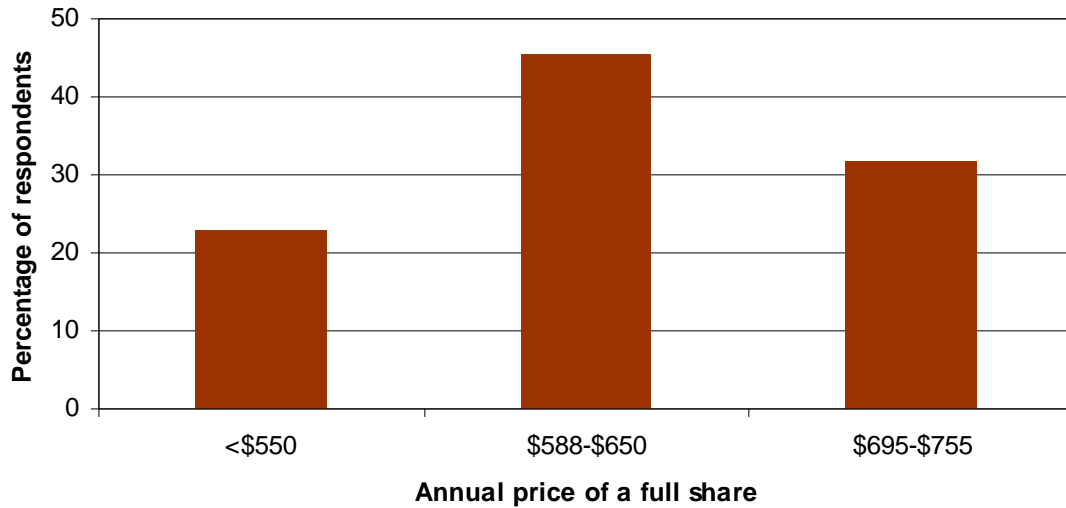
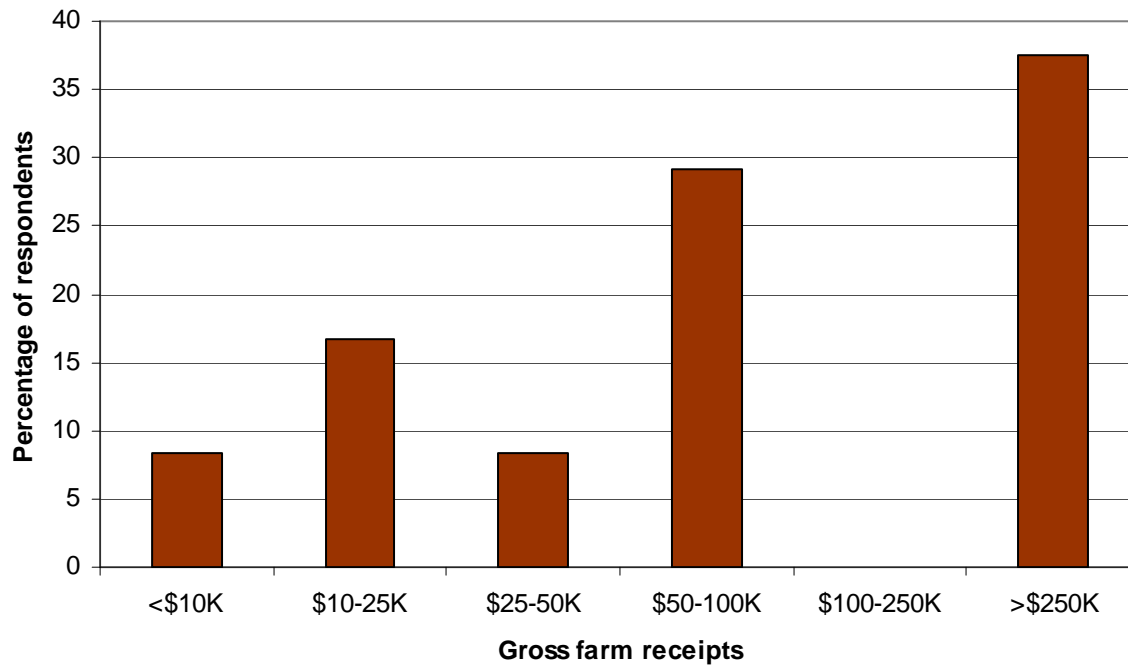


Figure 10. Gross farm receipts for CSA operators (n=24)



*No respondents estimated gross farm receipts between \$100K and \$250K

Figure 11. Estimated profit margin for CSA operations (n=18)

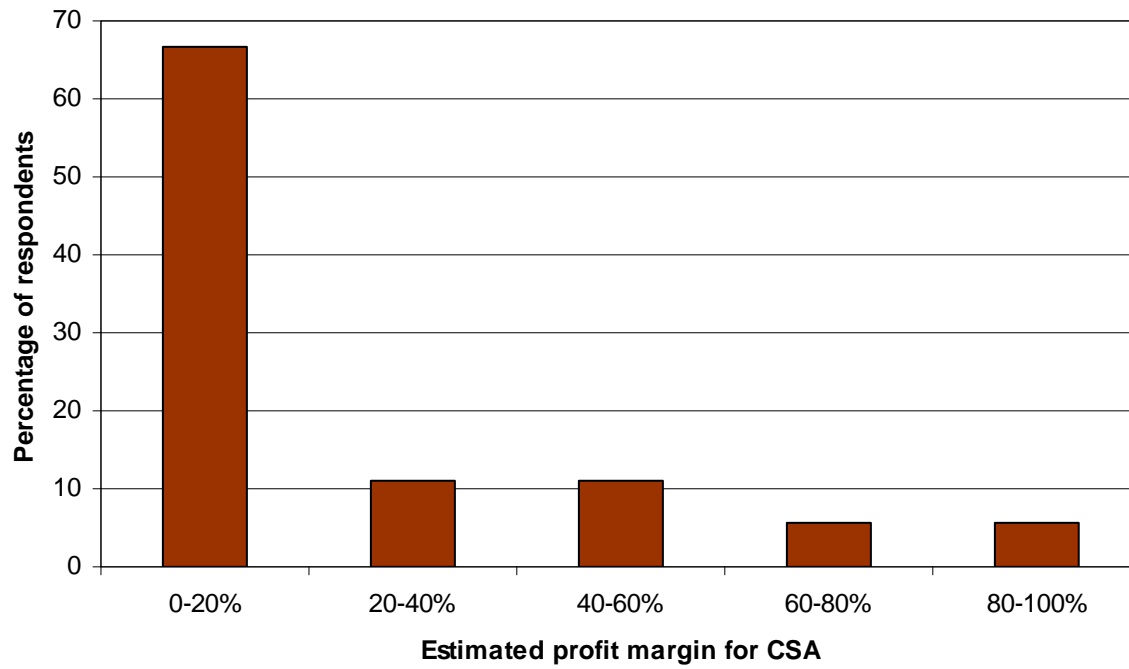


Figure 12. Challenges and barriers to profitability (n=24)

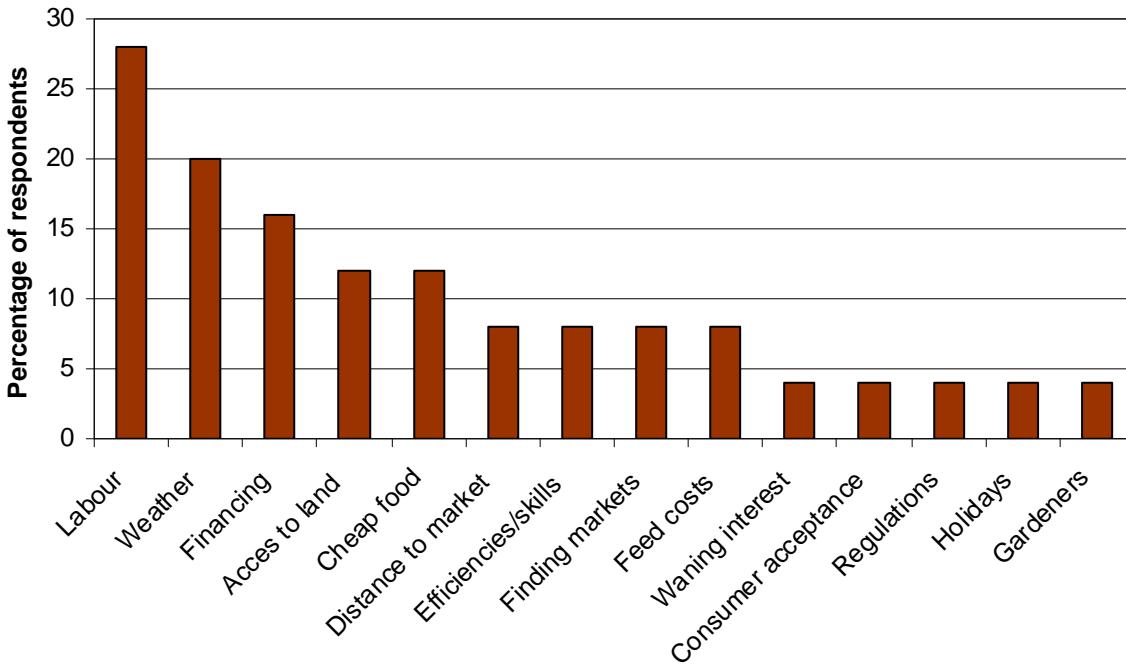


Figure 13. Alternative marketing channels (other than CSA) used by CSA operators (n=15)

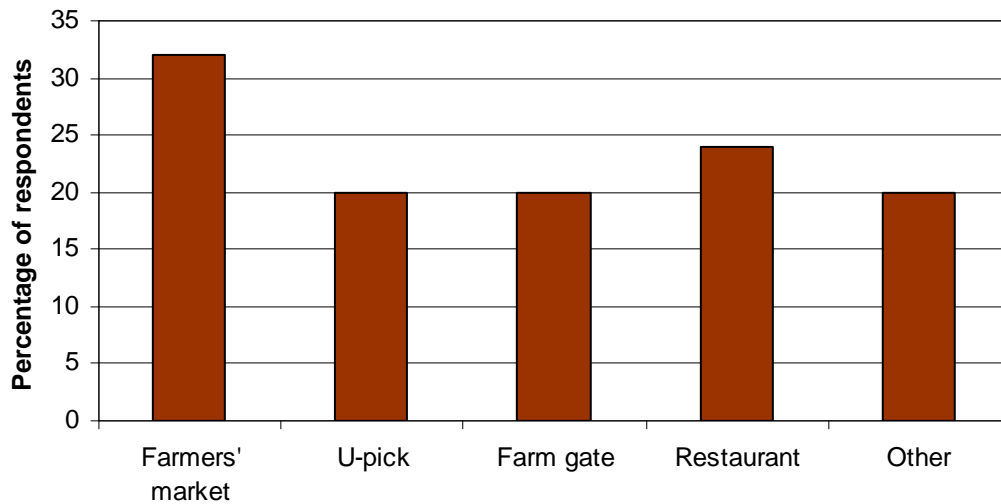
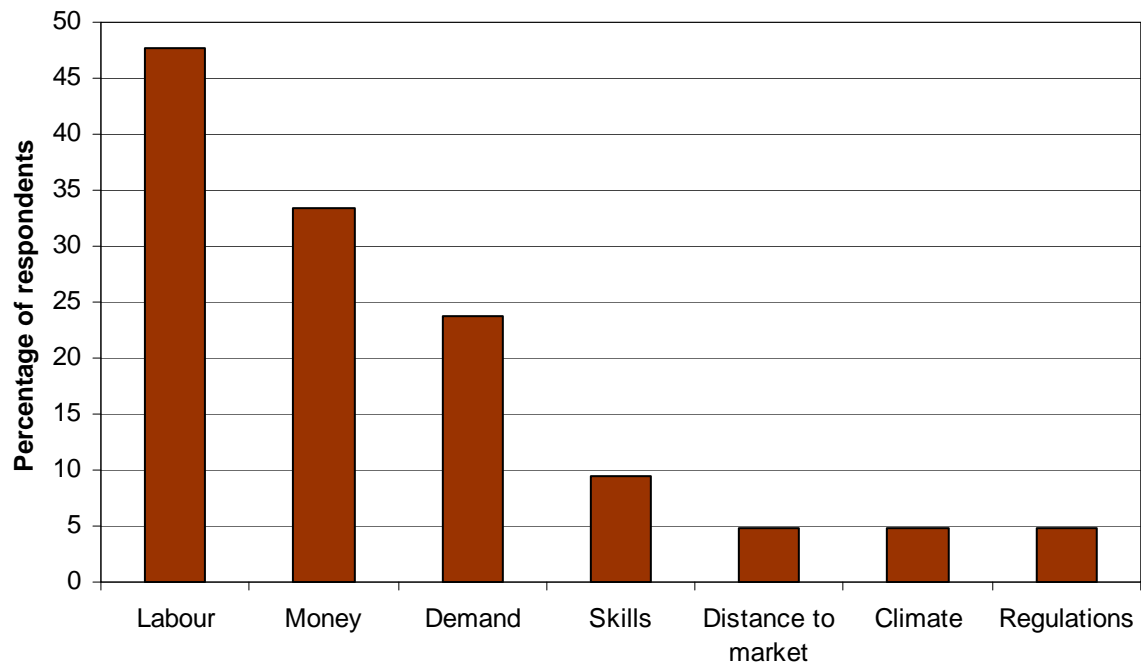


Figure 14. Factors impacting growth of the CSA (n=20)



*One respondent indicated that a surprising lesson was having to compete with CSAs that do not have to meet their cost of production (those with outside income).

**Figure 15. Lessons learned by CSA operators
(n=23)**

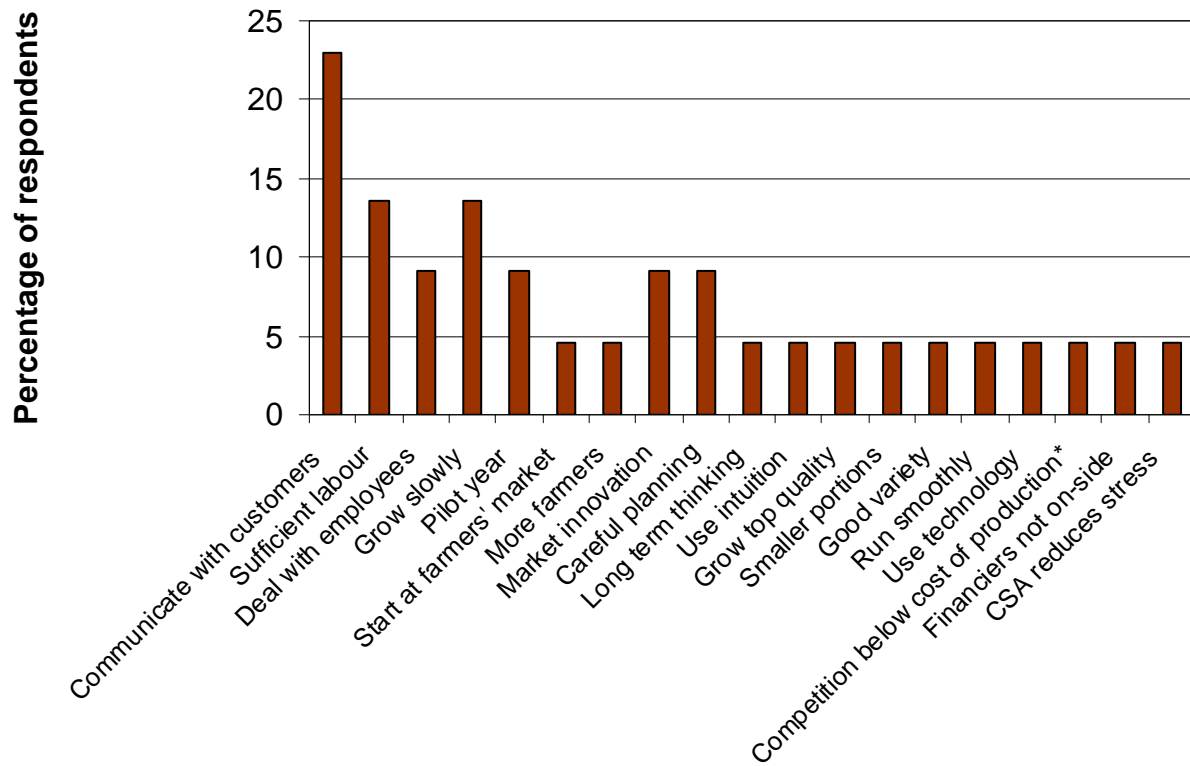
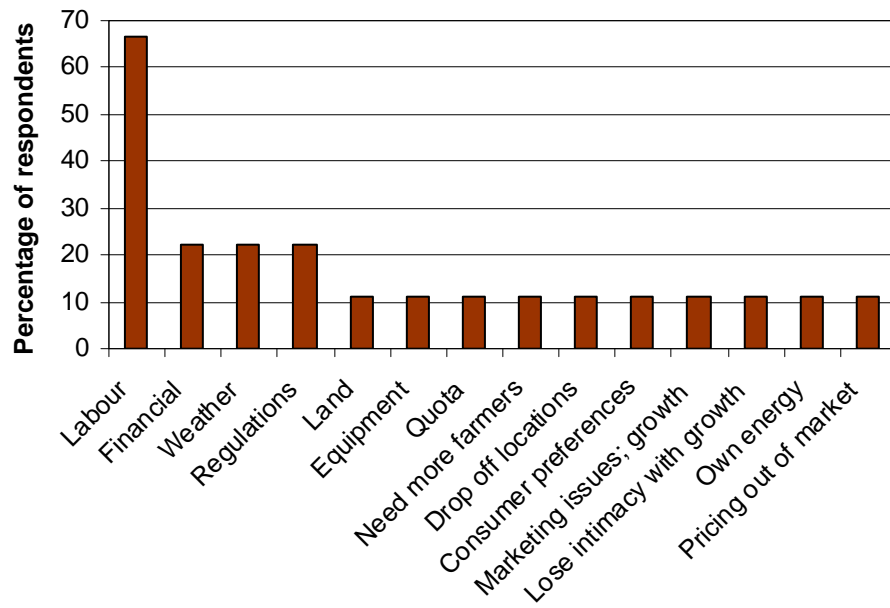


Figure 16. Challenges that CSA operators foresee (n=17)



Appendices

Appendix A – Literature Review

As demand for local food products increases in Alberta, so too do opportunities for producers and processors to market directly to Albertans. A growing number of operators are selling directly to Alberta consumers through Community Supported Agriculture, sometimes referred to as Community Shared Agriculture (CSA). This study will use the wording Community Shared Agriculture. CSA models vary from single farms selling shares or subscriptions for farm products that are supplied to consumers for a specified period of time, to a collective of farms and other agri-food operators (eg. bakeries) working together to supply products to shareholders/subscribers year round. CSA participants – producers and consumers – share the risks and rewards in the production and consumption of fresh local food.

The CSA concept is gaining popularity and expanding in all regions of Canada to over 400 CSAs³, with approximately 40 CSAs operating in Alberta. While the recent report titled *Alternative Agricultural Markets in Alberta 2012* indicated that only two per cent of the 1,058 survey respondents claimed to participate in CSA/box programs (ARD 2013), 18 per cent of non-participants indicated that they were interested. Alberta Agriculture and Rural Development (ARD) recognizes the growing interest and increasing farmer participation in CSAs. As such, ARD is supporting the development of information that can contribute to increased local food purchases through CSAs and has initiated this study to obtain detailed information on the factors contributing to the economic sustainability of CSAs.

This literature review describes CSA business models that exist in Canada and the United States, as well as internationally (e.g. Europe and Asia). We have focused our review primarily on North American research of CSAs, of which there is a rich source spanning 20 to 30 years.

Definitions

Many definitions have been applied to CSA. Most are similar to that provided by Bruch and Ernst (2010):

“Community Supported Agriculture, or CSA, is a direct marketing channel by which farmers sell shares or subscriptions for farm products to customers. A diverse selection

³ Although European and academic sources often refer to CSA in the singular, common usage seems to add an implied “operation”, for instance “a CSA” or several CSAs. We will use the former when referring to the concept, and the latter when referring to the specific.

of products is delivered regularly for a specified time during the harvest period to customers at designated pick-up sites. CSAs are typically used to market fresh produce, but can also be used to market meat, eggs, honey, flowers and other products.”

Some provide a more social context, such as this, from USDA, quoted from ACORN (2013):

“[CSA] consists of a community of individuals who pledge support to a farm operation so that the farmland becomes, either legally or spiritually, the community’s farm, with the growers and consumers providing mutual support and sharing the risks and benefits of food production.”

And some, such as this provided by Flora and Bregendahl (2012) are fairly political:

“[CSA] strives to establish economically viable, ecologically sound and socially just relationships in the process of food production.... CSA is an example of system transition initiated by innovative actors through change at the local level.”

Community shared or supported agriculture is an evolving concept. More generally, it refers to a commitment between farmer and consumer to share the risk of food production. The farmers provide the land, skills, labour and ultimately the food production; the consumers provide a financial investment and sometimes labour. CSA develops to serve the environment, both physical and social, that nurture them. As Perry and Franzblau (2010) suggest,

“CSA is to an extent what you make it to be in your setting. If it seems to be CSA, even if some ‘key’ component is missing, it is CSA.”

History

According to Henderson (2010), CSAs arose because "A century of “development” has broken the connection between people and the land where their food is grown and in many countries, north and south, a few decades of free trade have driven family-scale farms to the point of desperation. A long series of food scandals – illnesses from food-borne pathogens, milk and other products contaminated with GMOs and chemical pollutants – have led to a crisis of confidence in imported foods from industrial-scale farms. CSA offers a return to wholeness, health and economic viability."

Japan

In Japan, CSA has been traced to the early 1960s, and to consumers (mothers and housewives), philosophers (notably Teruo Ichiraku) and farmers (such as Yoshinori Kaneko; Henderson 2010).

Consumer interest in Japan has been attributed to mothers that were concerned with methyl mercury poisoning (Perry and Franzblau 2010), concerned with the growing importation of food and loss of arable land (Fairshare nd) or concerned about the price of milk (IISD nd). These concerns mirror the complex reasons that lead people to consider closer alignment with farmers

and which underpin the CSA movement today: obtaining clean, quality food, at affordable prices that are fair and sustainable for producers who use methods that are kind to the environment.

Yoshinori Kaneko is considered one of the Japanese pioneers of CSAs. He developed his farm produce distribution network from a book club that studied environmental issues in the food supply. He provided rice, wheat and vegetables from his farm to 10 families who, in turn, provided money and labour. His model of *Teikei*, developed hand-in-hand with organic agriculture. *Teikei* is referred to as “food with the farmer’s face on it,” and implies a close partnership, and production without chemicals (Henderson 2010).

Seikatsu Clubs developed at about the same time. These were locally organized cooperative networks that shortened the supply chain between producer and consumer. Today the *Seikatsu* Clubs have become internationally recognized with a Right Livelihood Award (TRLA nd), and have grown to 600 groups supplying more than 22 million people (Fairshare nd). They now provide about 3,000 products (Poirer nd) and have expanded their focus to include child and elder care, anti-GMO activism, reuse of packaging, carbon dioxide reduction, clean energy and political action (PRI nd).

Europe

At about the same time, a similar system was developing in Switzerland and Germany. Unaware of the Japanese model, these farmers claim inspiration from collective farms in Chile and the peasant worker movement in France (Henderson 2010). In their system, called *Voedselteams*, members pay for land rental and provide some of the work in exchange for a share of the production of the land.

North America

CSA began as a direct marketing channel in the USA in the mid-1980s, introduced by Jan Vendertuin, and Trauger Groh, immigrants who had been involved with organic and biodynamic farms in Germany. Two different models developed. In the first, members pay a fixed price for a fixed weekly share. In the second, the member pledges an amount based on his/her ability to pay, and receives a food portion that reflects their relative contribution.

In its beginnings, CSA had a strong environmental and social component, associated with organic and biodynamic production methods, with strong transparency in production practices, and with a focus on establishing an equitable relationship between farmer and consumer.

Current Status

CSAs are growing rapidly in North America. Estimates vary from 1,000 to 1,500 CSAs in the US in the last decade. The USDA suggests that as many as 12,549 farms marketed products through a CSA in 2007 (USDA 2007).

Canada

Canada is home to approximately 450 CSAs, with the largest number in central Canada. In 2011, Ontario had approximately 200 CSAs, with 8,000 shares, generating \$7.3 million. Roughly 28 per cent of those surveyed identified their products as certified organic; two-thirds reported growth in the number of shares from 2010 to 2011. In Quebec, roughly 90 per cent of CSAs (or ASCs, *Agriculture soutenue par la communauté*) are members of *Equiterre*, which reports it has 78 CSA farms, 10,500 shares and \$4 million in revenue. This would suggest approximately 87 CSA farms in total in Quebec with an estimated revenue of \$5 million (MacKinnon 2013). In 2010, Henderson reported that *Equiterre* had over 100 farms participating in CSAs and 33,000 members. It appears that CSA share numbers have decreased in Quebec in the past few years.

According to a 2013 report by the Atlantic Certified Organic Regional Network, there are approximately 50 CSAs operating in the Atlantic Provinces (certified organic and non-certified CSAs). Extrapolations from the data provided in the survey suggest that total revenue of \$1.4 million was generated by the 50 CSAs serving over 2,940 households in the Atlantic region.

MacKinnon (2013) estimated the number of CSAs in BC at 40, based on the 33 reported on the Farm Folks City Folks website in 2012. There were 49 listed in 2013. Of the CSAs surveyed by MacKinnon, approximately half were certified organic. MacKinnon estimates the 40 CSA operators generated revenues of \$1.2 million in 2012. We found no studies of CSAs in the Prairie Provinces. A quick Google search found 25 CSAs in Alberta, six in Saskatchewan, 17 in Manitoba, and one in the Yukon. These provide minimal estimates, as CSA numbers are most likely under-represented on Google. Government of Alberta estimated in 2012 that there were 15 farms with CSA subscriptions in Alberta. By the end of 2013, the website www.csaalberta.com lists 24 (Gregoire, 2013).

United States

CSAs vary from large gardens supporting a handful of people to large operations such as Honey Brook Organic Farm in New Jersey with over 3,000 shares and employing many migrant workers (Flora and Bregendahl 2012). Most CSA projects are organic or biodynamic; in 1999, Brown and Miller (2008) found 94 to 96 per cent used organic methods.

In Michigan, the Food and Farming Network (2007) estimates that approximately 20 to 30 shares can be supported per acre of production. Shares tend to range between \$15 and \$40 per week. For every 30 shares, one worker is required, but 80 to 100 shares may be needed to provide full time

income. In central California, Galt et al (2012) found that CSA farmers tend to be relatively young, more often female, white, and well educated than the general farming population. Median farm size was 20 acres with six acres devoted to the CSA. Median membership was 60.

Business Models

From the very beginning, alternate business models have been associated with local CSAs. Although CSAs are a relationship between farmer and consumer, in practice, a distinction could be made between those that are farmer run and those that are run by a community group.

Subscription CSAs

Subscription CSAs are farmer-driven. The farmer organizes the CSA, produces the farm products and recruits the customer members or subscribers. Many CSAs are *sole proprietorships*. Decision making and management are centralized with the owner.

Shareholder CSAs

Shareholder CSAs are consumer-driven. They typically feature a core group of consumers who organize the CSA and hire a farmer (Bruch and Ernst 2010).

Hybrid forms between the subscription and shareholder model exist, with consumers playing greater or lesser roles in the decision making and administrative functions. Often there is a core consumer group that is active organizing social functions, setting up delivery locations, running social media, etc.

Multi-farm subscription CSA

A variation on the subscription CSA is the multi-farm subscription CSA, in which farmers from more than one farm provide products to fill the shares. These CSAs may be run by a single farmer who runs the CSA and sells other farmers' products along with his own. In this case, the CSA farmer is acting as a *broker* for other farms. In some instances, he or she may be purchasing additional items from non-farmers or non-local farmers as well.

Alternately, multi-farm CSAs may be *general partnerships* among farmers, where each contributes assets and shares in management. A *limited partnership* involves both general partners and limited partners where general partners are involved together in management decisions and limited partners make no decisions but invest capital. In a CSA context, the general partners are usually farmers, and the limited partners are consumers who consider the CSA an investment opportunity.

Farmer-driven subscription CSAs can also be run as a type of *farmer cooperative*, with two or more farms pooling resources to supply customers. These are often referred to as cooperative or Collaborative CSAs, or CCSAs. CCSAs can work well as a collaboration of large and small (or extensive and intensive) production, where small farmers supply labour intensive crops such as carrots or herbs and large farmers supply crops that take large space, such as corn or pumpkins. CCSAs generally have a board of directors, and staff, as well as administrators who recruit growers. This structure allows producers to specialize and diversify, and to collectively have the redundancy needed for high volume or risky crops.

Some CCSAs determine the farmer's share of profits by considering the relative effort each producer contributes. An alternative is to determine a 'difficulty rating' for each item, and then dividing profits based on the farmers' proportion of difficulty.

Whether in partnerships or cooperatives, farmers that work together may bring their own farms to the mix, or they may work together on land that is managed by the group. In this case, land trusts may be involved. Alternately, a CCSA can be formed where both farmers and consumers are members of the cooperative and co-own the land and resources and work together.

CSAs can also be *corporations*. These are usually shareholder CSAs, which function as a separate legal entity comprised of shareholders, directors and officers. *Non-profit corporations* for education and social justice can also be a portion of a CSA. CSAs can also be run as *partnerships* between consumer groups and government agencies, churches, or community groups. In many cases it is a community group that applies for grants or runs educational programs, such as food preservation or cooking classes, for instance.

Variations on a theme

CSA is a local development, and different local groups have different context, and thus different priorities. This leads to a number of variations on the CSA theme. Each aspect of the CSA experience has variants.

A farm-linked aggregator may be a hybrid between a box program⁴ and a CSA. It is run by a farmer or broker and tightly linked to a single farm but combines that with produce consistently purchased from other farms or from a wholesaler.

Urban farming models involve back yards and otherwise 'wasted' space in urban environments. The landowner gets free fresh food, often in their own backyards; the farmer gains a land base. Often these CSAs involve SPIN (Small Plot INTensive) methods.

Protein CSAs offer fresh, frozen and/or value-added meat; eggs; and, rarely, dairy products. They may be structured differently from CSAs based on fresh produce, in that the "harvest period" for

⁴ A box program shares many features with a CSA: the regular delivery of a pre-paid, (often) fixed box of food; it differs from a CSA primarily in that it is not closely tied to a specific farm or farms

meat is limited. Often slaughter is only sporadically available to small producers, for instance, and is hard to match to the animal's maturity. Frozen storage may be used to extend the sales period, but also adds to the expense.

In some regions community shared fisheries (CSF) or community shared bakeries are developing.

Some CSAs consider *food security* an important issue, and are concerned with how to make membership more inclusive of lower income people while still supporting a farmer or farmers equitably. In the US, some CSAs allow payment in food stamps, and have a sliding scale, with higher payments subsidizing low income payments. Some CSAs work with groups that raise money to buy shares for the financially disadvantaged. Some have bulk shares for social service organizations, mental health organizations, etc. Some offer revolving loan plans, or supply soup kitchens and women's shelters. Some offer training and wages to homeless or mentally handicapped people.

Outreach activities for the disadvantaged may be subsidized by grants and social programs. Some CSAs have innovative partnerships with churches, government organizations, and foodie groups. They may have dinner in the field with celebrity chefs to raise money, or do various educational campaigns. One group funded activities through Community Services, while delivering educational activities and weekly baskets to Community Service clients.

Shares

Some CSAs have fixed shares, usually in two sizes: whole shares and half shares. Some CSAs have swap boxes, where members can leave unwanted items, and trade them for more desirable items. Some CSAs pre-pack the shares; some provide a list and bulk bins and allow members to pack their own. Some allow some customization of the member's share. Some CSAs take a step further, and fill boxes based on on-line orders. Some function as hybrids, and provide a fixed share, and the option to buy add-on items. For instance, a vegetable CSA may provide eggs, or baking provided by a separate farm. A large variety of add-ons are available, including meat, eggs, dairy, flowers, herbs, bread, baking, canning, soaps, fish. CSAs restaurants and bakeries were also identified. Some CSAs act to some extent as buying clubs, providing items from non-local wholesalers with a similar philosophy (eg. organic or 'green').

CSAs function best if members feel that they are getting value for their money, but often they wish to be generous and make beneficial choices. One CSA donates one share to a family that can't afford one, for every 25 shares that are purchased. This builds community and supports the social justice and food security concerns that CSA members often have.

Payment

Many CSAs expect payment of seasonal membership dues upfront before the season. Others allow weekly or monthly installments. Some allow pay as you go options, but some CSA operators suggest this is like a gym membership – the investment increases the likelihood of participating.

“I’d never have a pay as you go system simply because some people keep forgetting to collect their boxes” Rowena Hopkins, quoted by Melanson (2008).

Some CSAs require a labour component – from several hours per week, to a single work day per season. Some give credit for various ‘volunteer’ activities, such as preparing a newsletter, or making deliveries. For some CSA farmers, membership in the CSA provides a discount at that farmer’s stand at the farmers’ market.

Distribution

CSAs may expect members to pick up at the farm, if the farm is close to the consumers. Pick-up may be at a location such as a community centre or church. Sometimes small stores or businesses act as the drop-off site. This can be an inducement for customers to come into the store and buy other items as well.

Often CSA farmers also market through the farmers’ market, and encourage customers to pick up their share (and any extras they may wish) at the farmers’ market stall. Some CSAs offer home delivery. Forgetting to pick up shares is often a problem. Some CSAs solve this by donating undelivered shares to food banks.

Communications

Like other types of relationships, CSAs are dependent on communication. Newsletters, recipes, potlucks and other social events, workshops on preserving or cooking, Facebook pages, Twitter feeds and farmer’s blogs facilitate closer communications between CSA operators/suppliers and customers.

Income and profitability

In California, Galt et al (2012) found that only 54 per cent of CSA farmers surveyed found the CSA to be profitable. A further 32 per cent claimed to just break even. These producers were dependent on other market channels, and partners with off farm jobs to supplement the CSA income. Their motivation often included factors other than financial. Only a third of participating farmers paid themselves a salary.

In Canada as well, most CSA farmers use multiple market channels, thus the revenue from the CSA need not be sufficient for their entire “salary.” MacKinnon found that the majority of CSA farmers

sold through farmers' markets and restaurants. Average revenue from certified organic CSAs in BC was \$40,000 per year; from non-certified CSA operations, \$20,000. Certified organic operations tended to have more members and higher sales.

The ACORN study (2013) revealed that 37 per cent of survey respondents reported revenue between \$20,000 to \$40,000 (on 70 to 120 memberships); 16 per cent sold \$10,000 to \$20,000 worth of goods (on 40 or more CSA memberships), 42 per cent of responding CSA operators reported revenue of \$10,000 or less (on less than 20 memberships). Only one operator was selling \$500,000 to \$1 million worth of goods; this farm was operating year-round CSAs with more than 500 members.

Lessons from the Global Village

The spirit of CSA is alive in many countries under many names. Teikei has had limited uptake in Asia, outside Japan, but a few examples were cited by Henderson (2010) in Malaysia, India, China and South Korea. The Chinese example was a hybrid CSA and community garden. Shareholders pay in advance for a 20 week contract. They can receive either a share of produce from the communal plot or they can receive access to a 30 square metre plot of land to work themselves.

Box delivery systems have been popular in Germany and Denmark (Henderson 2010). In one Danish box scheme, customers pay in advance and receive up to 600 organic products from over 100 farms. Communications and engagement are improved by using Twitter, by including recipes from famous chefs and stories about the farms in the boxes.

Voedselteams in Belgium have hired organizers to go from town to town, signing up households which are then connected with the nearest farm. In Holland, one group uses 'Green Guilders'. Customers pay 1000 guilders in advance for 'green guilders' and then use these to shop at their chosen farm.

The Soil Association, in the UK, identifies a number of consumer-farmer partnerships in England (Henderson 2010). Some of these include innovations such as the use of alternative currency, i.e. LETS (Local Exchange Trading Systems). Other arrangements include rent-an-apple-tree projects, intentional communities, urban gardens and conservation based projects arising from the CSA.

In France, *Association pour le Maintien d'une Agriculture Paysanne*, or AMAP has been important in keeping farmers on the land. These close associations have been critical in matters outside the delivery of food, with one group acting to prevent land expropriation. AMAP has been central in developing Urgenci, an international group "to further, on an international level, local solidarity-based partnerships between farmers and consumers. We define the solidarity-based partnership as an equitable commitment between farmers and consumers where farmers receive fair remuneration and consumers share the risk and rewards of a sustainable agriculture." *Urgenci* has

sponsored CSA conferences and exchanges of French AMAP farmers with those in Eastern Europe and Africa (Henderson 2010).

One EU-wide initiative developed CSA-like projects in local areas in 25 member countries. In Portugal, these *Reciprocos* found that farmer education was also necessary to raise farmer self-esteem, provide literacy training and business and technical skills, and facilitate transition to organic farming.

Who are the players?

Subscribers

Interest in CSAs is growing rapidly. A recent study in Atlantic Canada (ACORN 2013) found that more than half of the subscribers to CSAs were first time subscribers. They tend to come from small households (often couples) and they want quality food (fresh, heirloom, ecological, organic, pesticide free), locally grown, and they want to support local farmers. Secondly, they have environmental and food security concerns.

Shares frequently cost \$23 to \$35 per week and included eight to 10 items. A full share was estimated as sufficient for a family of four; a half share would feed a two person household. During summer, CSAs averaged 25 to 75 full shares. The share season lasted 15 to 30 weeks in most cases, though year round CSAs also existed. The ACORN study (2013) reported a high retention rate of subscribers (70% to 80%).

Farmers

According to the ACORN study, CSA farmers generally worked two to four acres. They found that one acre could support 20 to 25 summer shares. Nearly all CSA farmers also sold at the farmers' market. Forty per cent of the CSA operators surveyed reported earnings from the CSA of less than \$10,000.

In California, CSAs yielded more income per acre than the California average for all farms. CSA farmers were younger (average 42 to 43) and better educated; included more women, and more people who self-identify as white. They tend to have less farm experience than average. CSA farmers tended to be committed to the environment, agroecology and agrobiodiversity. Most self-proclaim to meet at least organic standards. The farms are relatively small; 20 acres on average (Galt et al 2012).

Benefits

According to Flora and Bregendahl (2012), producers choose to participate in CSAs primarily because they thought there would be financial advantages (75%). Several of the potential benefits of CSAs are financial: spreading the risk among the community, securing markets, reducing marketing time during prime production, members provide crop insurance. Other benefits include the potential to diversify, to reduce waste, to receive immediate feedback, and to be more integrated in the community. In decreasing order of importance, farmers also hoped to find social, cultural, human capital and natural capital benefits in CSAs.

When asked which benefits they actually achieved, CSA farmers identified natural and social capital as important benefits. Financial benefits were ranked last, suggesting that the financial gains they sought were not achieved. 40 per cent of CSA farms cited financial difficulties for not continuing with the CSA the following year.

For multiform CSAs, benefits also include the potential to participate in mentoring, share storage, collaborate with environmental groups, focus crop production, reduce commitment to transportation, and by working with other growers to reduce risk, build community, provide each other a safety net, and preserve markets in difficult times.

Challenges

Challenges in CSA models include the need for intensive out-of-season marketing, and the need to provide personal information about the farm, farmer and production as transparently as possible to build relationships with subscribers/customers. Organization can be time consuming. There may be challenges in growing the needed crop diversity.

Key variables

A number of key variables and activities were described in the literature that may impact the success of the CSA. Some of these variables are described as advice to operators.

- ✓ Talk to other CSA farmers, get experience
- ✓ Cooperate with other farmers
- ✓ Partnerships need to be well defined but may reduce expectations on individual farmers
- ✓ Start small
- ✓ Be prepared to work very hard
- ✓ Research consumer base in your area (one CSA suggested a high proportion of 25 to 35 year olds with children was ideal)
- ✓ Try to set up a core group or help committee
- ✓ Recruit new members
- ✓ Build relationship and loyalty

- ✓ Depend on many marketing outlets
- ✓ Provide quality and production methods consumers want
- ✓ Quantity
- ✓ Variety of products throughout season (includes staggered planting)
- ✓ Season extension
- ✓ Price shares for positive net return
- ✓ Advance planning and market analysis
- ✓ Consistency in pricing a number of items per week
- ✓ Quality in food value and customer service
- ✓ Communication at delivery and through media
- ✓ Updates through social media
- ✓ Don't let customers forget about you
- ✓ Use word of mouth, farmers' markets, online directories, websites, blogs, referrals, posters/brochures, speaking at events, logos and signage, on-farm tours and events
- ✓ Educate members on CSA model
- ✓ Provide product information and recipes

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For profiles of CSAs see

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- Brusch and Ernst (2010) profiles Delvin Farm, a 800 member CSA in Tennessee
- Melanson (2008) profiles six CSA farms in Atlantic Canada
- Perry and Franzblau (2010) profile five cCSAs in USA
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Appendix B – Survey

Guidance for FOIP reviewers:

Alberta Agriculture and Rural Development (ARD) recognizes the growing potential of Community Supported or Shared Agriculture (CSA) as a sustainable and significant direct marketing channel for Alberta producers. As such, ARD is supporting the development of information that can contribute to increased local food purchases through CSAs and is conducting this study to obtain detailed information on the factors contributing to the economic sustainability of CSAs. This survey is being conducted within this context.

Project Goals and Scope:

Compare the business models, price structure and performance of CSA operations. Obtain detailed information about membership turnover, reasons for growth, input cost per share, marketing and production risk, business longevity, and market diversification. Provide analyzes of critical success factors for CSA producers based on the discussion of, but not limited to, the following:

1. Assess production planning and experience with season extension.
2. Analyze market potential before developing a CSA.
3. Develop a marketing plan to reach the target market.
4. Estimate the cost of labour and document the skills required to perform the task.
5. Determine how to price a CSA share.
6. Secure financing.
7. Develop payment policies.
8. Develop a membership agreement limiting the producer's potential liability, including product and landowner liability, as well as a description of refund policies.
9. Determine when and where shares can be picked up by or delivered to, customers.
10. Decide on the use of technology for record keeping and accounting.
11. Understand and navigate the regulations impacting CSA operations.
12. Manage and expand the scale of production for profitable returns.

Main Research priorities:

1. General description of farmer, farm & CSA operation (to set the context and to develop a profile of CSA operators, including social aspects such as their goals, reasons for growth, etc.)
2. Marketing planning process – includes identifying the opportunities and analyzing the marketing potential to the entire marketing plan (marketing objectives and strategies for each of the marketing elements – i.e. Product/product mix/packaging, price, place/distribution, promotion/outreach, customer relations)
3. Production planning and season extension
4. Management (labour, contracts, regulations)
5. Profitability and financial stability

Proposed survey

Informed Consent

On behalf of Alberta Agriculture and Rural Development (ARD), Dr. Brenda Frick and research team members Gunta Vitins and Rochelle Eisen (herein after referred to as ‘the researchers’) have been commissioned to conduct interviews that will result in a critical analysis of the success factors for Community Supported Agriculture (CSA) operations. This will be done in a manner that allows the subjects to remain anonymous. Only non-identifying, aggregate information will be shared with ARD or anyone else outside of the researchers. The study will be used by ARD in an effort to increase their understanding of the operation and performance of various business models, to profile CSA operations in Alberta and to identify barriers to growth or potential opportunities in this sector.

We encourage you to participate in this important study. The interview will be scheduled at your convenience and will take approximately 45 minutes to complete, depending on the length of your answers and the complexity of your operation. At any time during the interview you may request that we break and finish the interview at another time. Also, at any time during the interview, you can refuse to answer a question or refuse to participate further. The researchers will provide you with an opportunity to see the information you provided, to ensure its accuracy. You will receive an electronic version of the final document once it is made publicly available.

If you have any questions or concerns about the interview or how your information will be used, please feel free to contact Dr. Brenda Frick by e-mailing organic@usask.ca or by calling 306-260-0663. If you have any concerns regarding the overall project, please contact Mimi Lee, Project Manager with ARD by e-mail at mimi.lee@gov.ab.ca or by calling 780-968-3552.

As a participant I understand the purpose of the research and what my participation will entail. I understand I can stop the interview at any time. As such, I give my permission to the researchers to use the information they collect and to use it in a non-identifying way and include it in the final report prepared for ARD. If a request is made for my responses, I will be consulted prior to any decision on disclosure.

Signature of Participant _____ Date _____

Signature of Researcher _____ Date _____

Introductory message – Interviewer to read to Interviewee

In the Consent Form we discussed the reasons behind this study and how the information is going to be used. Do you have any questions about this?

The Consent Form also indicated that our intent is that respondents be anonymous. Individual responses you provide will be aggregated so that individuals can not be identified by their answers.

Notice of Collection: The personal information you provide, will be used for the administration of this research project. The information is collected and used under the authority of the Freedom of Information and Protection of Privacy Act and subject to the provisions of the Act. If you have any questions about how your personal information will be used, please contact the Project Manager, Alberta Agriculture and Rural Development by email at: mimi.lee@gov.ab.ca or by tel: 780-968-3552.

Survey questions identified by research priority

- 1) General description of farmer, farm & CSA operation (to set the context and develop a profile of CSA operators, including social aspects such as their goals, reasons for growth, etc.)
 - a) Tell us about your farming experience: years of farming experience; years of direct marketing experience; years of CSA experience
 - b) Tell us about your farm: location, amount of arable land, amount of land dedicated to CSA production, crops/products produced on-farm, general description of infrastructure (equipment, facilities, etc.)
 - c) Tell us about your CSA: type of business model (general description: single farm, multiple farms/suppliers, products, etc.), length of season (weeks), subscription start date, number of subscription points during the year, number of customers/shares (2013), years of CSA operation
 - i) How many shares did you have when you started? How quickly did you get to your current level and what is the optimum number of shares you would like to achieve?
- 2) Tell us about your key decision points: Why did you decide to develop a CSA? Why did you choose this business model? Why did you decide to grow to your current level? What are your overall goals for the CSA in terms of your personal situation? (e.g. to supplement income, to support the family, to fulfill a need in the community?)
- 3) Marketing planning process – begins at identifying the opportunities and analyzing the marketing potential, to the entire marketing plan (marketing objectives and strategies for each of the marketing elements – i.e. product/product mix/packaging, price, place/distribution, promotion/outreach, customer relations)
 - a) Did you analyze the following aspects before developing a CSA?
 - i) Whether the marketplace needed a CSA (or another one)?
 - ii) How many potential customers were interested in CSAs?
 - iii) The profile of the target customer?
 - iv) The size of the service area necessary to assure sufficient customers of the targeted profile?
 - v) What type of product mix were customers interested in?
 - vi) What promotional efforts were needed to reach these customers?
 - vii) What were the costs of promotion?
 - viii) What price of share was low enough to attract customers but high enough to generate a positive net return/profit?
 - ix) How many shares were likely to be sold?
 - x) How many shares must be sold to at least break even?
 - xi) What were the characteristics, strengths and weaknesses of the competition (suppliers of similar products, other CSAs and direct marketers)?

- xii) What other issues, such as regulations, or opportunities exist in the marketplace that may affect CSA share sales?
 - xiii) Possible off-farm delivery / pick-up sites?
 - b) Did you develop a comprehensive marketing plan before proceeding with the CSA? If yes, where did you obtain your marketing planning information?
- 4) Please describe your current marketing situation, from product and product mix to pricing, distribution, promotions and customer relations
 - a) Products:
 - i) How many food items/share are sold through the CSA at peak production?
 - ii) Do customers select product or do they receive a pre-set package?
 - iii) How are the products packaged and labelled? (e.g. cardboard boxes, reusable totes with farm/CSA name etc.)
 - iv) Are all products produced on the farm or are they also acquired from other operators/partners? Please describe relationship with other operators (e.g. what type of products, do you buy their products or co-operatively market, etc.) if applicable.
 - b) Price:
 - i) How is the price of a CSA share determined? Please elaborate (e.g. whatever the market can bear, match share prices of other local CSAs, calculate based on overhead and fixed costs of production, based on variable operation costs, income level of my community, required gross margin above my expenses, other)
 - ii) What is the price of a CSA share? Do you provide pricing options? If yes, please describe. (e.g. different sized shares, optional weekly buy-ins, trading/sharing boxes, point systems, vouchers, etc.)
 - iii) How do the prices differ between the options?
 - iv) Is there a discount or other incentive for current subscribers to resubscribe next year?
 - c) Place:
 - i) What is your distribution method? (e.g. delivery, pick-up, off-site distribution hub, other (please specify))
 - ii) How often do you distribute the CSA boxes? (e.g. weekly during the peak of the season, less in shoulder season).
 - iii) Is the CSA your only marketing channel? If no, what other marketing channels are you involved in? (e.g. restaurants, farmers' markets, farm gate, retailers, distributors, aggregators, processors, etc.).

- d) Promotion/Communication
 - i) What means of communication do you use to reach existing customers? (e.g. direct face to face one-on-one conversations, email, website, paper newsletter, e-newsletter, blog, Facebook, Twitter, on-farm events, speaking engagements, workshops, signage/posters, direct mail, other (please specify)).
 - ii) Which are your top three most effective methods?
 - iii) What means of promotion/ communication do you use to reach and attract new customers?
 - iv) Which are your three most effective methods?
 - v) What services/incentives do you offer to members? (e.g. product information, recipes, work share options, recruitment incentives, contests, social gatherings, etc.)
 - vi) How do you evaluate customer satisfaction? (e.g. on-line surveys, etc.)

- e) Payment policies
 - i) What type of payment structure is used for the CSA? (e.g. one payment upfront for the season, two payments, weekly, monthly, other (please specify))
 - ii) What payment method is accepted? (e.g. cash, cheque, Paypal, e-transfer, other (please specify))
 - iii) Are early payment discounts offered?

- f) Membership agreements
 - i) Do members sign a contract?
 - ii) What is covered in the contract? (e.g. food safety liability, general on-farm liability, product guarantee and availability, etc.)
 - iii) If a contract is not used, how is exposure to risk handled?
 - iv) Do you have a refund policy? If yes, please describe. What happens when people do not pay?
 - v) Do you have a waiting list?
 - vi) What is your member retention rate?
 - vii) Provide three top reasons for renewal and non-renewal

- 5) Production planning & season extension
 - a) How do you plan your production? (e.g. with share member input, based on member feedback/evaluations, considering options suggested in trade journals, etc.)
 - b) Do you use any season extension techniques? If yes, please specify (e.g. row covers, transplants, succession planting, plastic mulch, hoop houses, high tunnels, greenhouses, etc.)

- c) What, if any, non-produce items do you sell through the CSA? (e.g. eggs, meat, flowers, honey, dairy, soaps etc.)
 - i) Who produces the non-produce items? (e.g. you, other local farmers/operators, other (please specify)).
 - d) Are you experiencing any challenges regarding current production or future expansion? If yes, please describe.
- 6) Management (labour, contracts, regulations)
- a) Labour/partnerships
 - i) How many employees do you have (e.g. full and part time; seasonal, year round)? How many of these are family and friends?
 - ii) How do you allocate labour between farm staff and family members?
 - iii) Does the operation have sufficient labour for all aspects of the business?
 - iv) Where do you find staff?
 - v) How do you estimate the cost of labour? (e.g. based on the various tasks/aspects of the business such as production, harvesting, packing, marketing, management, etc.; based on previous years, etc.)
 - vi) What is the estimated cost of labour in terms of percentage of overall costs of production for the CSA operation?
 - vii) If you are collaborating with other farmers/operators in the CSA, do you have formal agreements or contracts with your colleagues? If yes, please describe.
- 7) Profitability and financial stability
- a) Profitability
 - i) What was your total amount of gross farm receipts/revenue? (under \$10,000; \$10 to 25,000; \$25 to 50,000; \$50,000 to 99,999; \$100,000 to 249,999; \$250,000 and over)
 - ii) What percentage of gross farm receipts/revenue is generated by direct marketing channels? By the CSA?
 - iii) What is the profit margin/share at current member numbers? (0 to 20%, 20 to 40%, 40 to 60%, etc.)
 - b) Financing & financial stability
 - i) How are you financing the CSA operation? e.g. personal, family, business partners, other businesses, bank loans, etc.
 - ii) If bank loans were secured, was the loan granted specifically for CSA operation?
 - iii) Is there a business plan for the CSA? If yes, is it revisited regularly and updated? How has having a business plan impacted the overall business?
 - iv) What type of recordkeeping and accounting software is used for the CSA & why? (e.g. Quickbooks, Simply Accounting, Farmigo, other (please specify)).
 - v) What are the greatest factors impacting growth for the CSA business?
 - vi) What are the greatest challenges or barriers to profitability?

vii) In what ways has the CSA impacted other aspects of your business? (e.g. spin-offs, opportunities, increased retail sales, growth at farmer's market, increased media attention, etc.)

viii) Do you have plans for future market diversification? If yes, please describe.

8) What programs and/or information from government and/or industry associations would be useful to help promote growth of CSAs in Alberta? What industry associations are you affiliated with?

9) Please describe the lessons you have learned when dealing with challenges/constraints in your operation. Are you experiencing or do you foresee any additional barriers to growth?

10) What do you see as the future of CSAs and local food systems?

Conclusion

That brings us to the end of our questions. Thank you again for participating in this survey. Again, if you have any concerns or questions, feel free to contact myself, or the individuals identified on the consent form.

We would like to invite you to a workshop in Red Deer on CSAs being hosted by ARD on November 14th. This would give you the opportunity to hear four speakers, and to book some one-on-one time with a mentor the following day. Would you be willing to attend a focus group meeting after the workshop, from 3:30-5pm? Brenda Frick will be presenting a summary of the research findings, and giving the producers there a further chance to give opinions or additional insights before the report for this project is finalized. Do you think this is something in which you might like to participate?

Appendix C – Focus Group Responses

At the ‘Build your CSA’ workshop held November 14, 2013 in Red Deer, participants were asked to discuss their key challenges and the key factors for success in operating a CSA.

Participants identified the following challenges:

- Customer education (7 votes⁵): People haven’t heard of CSAs, and don’t know what they are. They don’t understand the concept, so they don’t know if the fit is right for them. Many variations of CSAs exist, further confusing people.
- Labour (6 votes): It is hard to get farm labour, especially if the farm is far from an urban centre. Few people have a passion or knowledge about vegetables, in general, or to work with them.
- Production (6 votes): Several production challenges were mentioned, including weather; not being eligible for hail insurance on small acreages; access to irrigation; and access to and cost of equipment, scaled to small scale horticulture.
- Finding unique marketing strategies (4 votes): Suggestions included logos on delivery trucks, Kijiji, and existing customers. It was noted that the customer dynamic was different from farmers’ markets, that the CSA must be seen and heard from, and that winning over customers would increase loyalty.
- Accessing financing (4 votes): This was an issue for those starting with a mortgage. Traditional sources won’t lend to CSAs; micro loans are not very successful, with more paperwork than they warrant.
- Transportation issues when delivering to urban areas (4 votes).
- Rapid expansion costs were not covered in share prices.
- Competition from other box programs.
- Growing the whole pie, while growing your piece of the pie – how big will that pie be?

Participants identified the following factors for success:

- Using online marketing tools, including own website (11 votes): including Facebook and Facebook ads, social media, encouraging local food bloggers to try your product, tracking website hits to inform choices.
- Farming near an urban population (10 votes).
- Finding a good time and place for pick-up (7 votes): Demographic statistics are available to find well-to-do neighbourhoods; flexibility is needed for delivery date.
- Communicating with customers (6 votes): introducing new vegetables and explaining uses, seeking customer input to improve customer approval.
- Receiving share money up front (3 votes).

⁵ Participants were asked to vote for their most important three challenges or factors for success. Collectively they cast 31 votes for challenges and 46 votes for factors of success.

- Picking popular vegetables (2 votes): potatoes and kale mentioned as items that shouldn't appear too often in shares.
- Share size (1 vote): customers need to perceive value in product, and thus will not want to waste any; don't overfill.
- Established growers have reduced risk.
- Provide good product variety, and choice in products.
- Find community partners.
- Access to land and arrangement of land tenure.
- CSA association for networking; mention of CSA Alberta website.