New Jersey Department of Agriculture

Specialty Crop Block Grant Program (SCBG)
SCBG Agreement # 12-25-B-0938

Final Report

Submitted; December 28, 2012

(Revised February 19, 2013)

SCBG Project Reports;

New Jersey Department of Agriculture	Page	2
Tri-County Cooperative Market Auction Association	Page	11
The New Jersey Nursery and Landscape Association	Page	14
Outer Coastal Plain Vineyard Association	Page	19
Northeast Organic Farming Association of New Jersey	Page	23
Garden State Wine Growers Association	Page	26
New Jersey Peach Promotion Council	Page	30

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SCBG Agreement # 12-25-B-0938

The New Jersey Department of Agriculture (NJDA)
Final Report
December 28, 2012
(Revised February 19, 2013)

Project Title
"Project designed to maximize the effectiveness of the Jersey fresh product branding and advertising program"

Project Summary
New Jersey's high population density, and other economic factors, makes it difficult for our growers to always be the lowest cost producer of specialty crops. Due to the prevailing commodity based pricing structure for most commercial packs of specialty crops New Jersey growers are therefore at a disadvantage

One of the most important ways to add value to specialty crops is to promote them as locally produced. Through the Specialty Crop Block Grant Program (SCBG) our agency seeks to improve the promotion, and market value, of locally grown specialty crops through an expansion of the *Jersey Fresh* advertising and promotion program through increased advertising, branding at the point of sale and the involvement of non-profit specialty crop growers organizations. The purpose of these projects is to maximize the effectiveness of the *Jersey Fresh* product branding and advertising program.

The following statistics illustrate the steady decline in all farms including specialty crop producing operations;

Year	# of NJ Farms	Land in NJ Farms (acres)	Average size of NJ Farms in acres
1957	19,000	1,560,000	82
2010	10,300	730,000	71

In the past 53 years New Jersey has lost half of its farmland. It is important for the NJDA to work to add value to specialty crops to improve the economic viability of New Jersey specialty crop producers. The SCBG funds assisted in this effort.

For the past twenty-eight years the Jersey Fresh program has promoted a consistent brand image of New Jersey's fruit and vegetable crops as fresh, nutritious, high quality and locally grown.

The most effective methods of promoting, and maintaining this consistent consumer and industry recognition of the brand, has been through the use of television, print, outdoor and point of purchase advertising. This project built upon past projects funded by both

the State of New Jersey, individual grower organizations and the Specialty Crop Block Grant program.

Because the process of marketing and brand identification is continual it is important to always promote a consistent brand image. Product branding ensures potential customers that they will have a consistent experience whenever they purchase a branded product. Another part of the branding experience for consumers is the creation and maintenance of a certain brand identify which communicates a level of quality and consistency, its' market position relative to other products and a type of product personality.

The continuation of similar advertising and promotional efforts to build brand identity is necessary to maintain consistent brand identification.

Project Approach

For the past twenty-five years the *Jersey Fresh* program has promoted a consistent brand image of New Jersey's fruit and vegetable crops as fresh, nutritious, high quality and locally grown. The most effective methods of promoting, and maintaining consumer and industry recognition of the brand, has been through the use of television, radio and print media combined with point of purchase advertising.

The Specialty Crop Block Grant – Farm Bill funds were used to supplement the existing *Jersey Fresh* promotional program for locally grown fruits and vegetables. The funds were used to purchase of media buys for existing *Jersey Fresh* print and television advertisements, outdoor media, the development of point of sale advertising materials and the creation of a new trade show display for the *Jersey Fresh* program. Working in close coordination with CMD & Partners, the contracted advertising agency for the *Jersey Fresh* program, consumer television and outdoor advertising media buys were made in order to continue to support and enhance consumer awareness of the *Jersey Fresh* brand. Using the easily recognizable *Jersey Fresh* brand name the ads were designed to promote the availability and quality of locally grown fruits and vegetables directly to consumers at the peak our growing season.

Activity	**Expenditure**
Television Advertising	$131,951.65
Print Advertising	$107,520.15
Outdoor Advertising	$ 31,131.25
Point of Purchase Advertising	$ 59,368.17
Jersey Fresh Display	$ 6,160.00
Agency Commission	$ 13,383.96
Interns	$ 9,198.25
Total	**$358,713.43**

Trade Print Advertising

In 2010 Jersey Fresh advertisements were placed in four editions of Produce News. With a circulation of 12,456 a total estimated number of 49,829 media impressions were achieved in this produce industry publication.

In 2010 Jersey Fresh advertisements were placed in four editions of the Produce Business magazine. With a circulation of 14,893 a total estimated number of 59,316 media impressions were achieved in this produce industry publication.

See; http://www.producebusiness.com/media/ebooks/10jun.pdf June 2010 edition of the Produce News on Page 49 for a copy of the trade ad we have been using, this ad was updated with new names for the 2010 editions.

In 2011 seven ads were placed in the Produce News publication.

In 2012 five ads were placed in the Produce News, four ads in Edible New Jersey, one ad in the Packer publication and four ads in the Gardener News.

All of the above print advertising was funded through SCBG # 12-25-B-0938 and were placed between the period of 7/7/2010 and 9/13/2012.

Television Advertising

An estimated total of 225 Jersey Fresh television ads ran on Comcast cable television from June to August 2010.

An estimated total of 150 Jersey Fresh television ads ran on the NJN network from June to August 2010.

An estimated total of 150 Jersey Fresh television ads ran on the 12 New Jersey local news channel from May through July 2010.

No current website link exists from which to view the Jersey fresh television ads which aired in 2010.

Outdoor Advertising

10’ x 20’ Jersey Fresh advertisements were placed on approximately 10 NJ Transit buses operating out three separate locations in 2010 from the period May to June.

As outlined in the 2009 Specialty Crop Block Grant application the effect of this supplemented Jersey Fresh advertising effort is expected to be measurable and reflected in a Jersey Fresh consumer awareness study to be conducted later this year. That study will compare several aspects of consumer awareness of the Jersey Fresh brand against earlier similar studies.

Point of Purchase Items;
An important part of the Jersey Fresh program's success has been its ability to assist in branding produce at the point of sale with a variety of point of purchase advertising materials. To support branding at the point of sale at roadside farm markets, community farmers markets and retail supermarkets point of purchase advertising materials were produced and distributed by the NJDA staff and interns.

The following point of sale promotional items were produced;

Small Price Cards	50,000	$ 0.03	$ 1,700.00
Small stickers	1,000	$ 2.45	$ 2,280.17
Large Generic Price Cards	100,000	$ 0.08	$ 7,500.00
PolySatin banners	1,000	$10.40	$10,400.00
Aprons	2,000	$ 5.75	$ 9,975.00
Banners	500	$14.50	$ 7,730.00
Hats	5,000	$ 1.75	$ 8,750.00
Large stickers	1,000	$ 4.23	$ 3,900.00
Pencils	10,000	$ 0.20	$ 2,218.00
Pennants	500	$ 9.33	$ 4,915.00
TOTAL			**$59,368.17**
			=========

Jersey Fresh Display
In accordance with the State of New Jersey Department of Treasury guidelines Department staff solicited three quotes for the procurement of a new trade show display for the Jersey Fresh program. Grapevine Visual Concepts of Huntington Valley, PA was selected to create a display consisting of 6 x 31.5" x 98" panels with 50 watt halogen light attachments and two transport cases with graphic wrap covers.

Media Buyers Commission
From the period of January 1, 2010 to March 6, 2012 the NJDA has paid a total of $13,383.96 in media commission fees.

Interns
In accordance with New Jersey Department of Agriculture human resource guidelines two college aged interns were hired to assist with the distribution of Jersey Fresh point of purchase advertising materials during the period of June to September 2012.

NJDA Jersey Fresh Project Staff:
Al Murray, Assistant Secretary of Agriculture, the administrator of the Jersey Fresh program provided oversight for project development and approved the budget, projects and creative themes.

Joe Atchison, Market Development Representative, is provided Jersey Fresh product development and procurement services. Mr. Atchison also worked as the primary department liaison to CMD Partners which, in accordance with the State of New Jersey

Department of Treasury guidelines, was the designated advertising services provider to the Jersey Fresh program

William Walker, Agricultural Marketing Specialist, provided professional marketing support and assisted in point of purchase advertising materials distribution. Mr. Walker also hired and supervised two college interns who assisted in the mailing of point of advertising materials and also made direct to store deliveries of Jersey fresh point of sale advertising materials.

Logan Brown, Economic Development Representative, assisted with the implementation of promotional and advertising projects related to the Jersey Fresh promotional program. Mr. Brown also served as the Jersey Fresh projects reporting and compliance officer for the utilization of Specialty Crop Block Grant funds utilized for the Jersey fresh program.

Lynn Coffin, administrative assistant, facilitated payments and worked to track expenses related to the utilization of Specialty Crop Block Grant funds utilized for the Jersey fresh program.

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Goals and Outcomes Achieved

The goals of this project were achieved through the completion of the planned television, print, outdoor and point of purchase advertising efforts. In addition those efforts were also supported by the creation of a Jersey Fresh trade show display and with the assistance of college interns. Summaries of those efforts can be found in the above project approach section of this final report.

The outcomes for this project were planned to be measured through the use of a consumer awareness survey. The survey was used to measure the long term effectiveness of the Jersey Fresh program. In the past consumer awareness surveys of the Jersey Fresh brand and its attributes have been conducted in 1984-1988, 1993, 1995, 1996, 1999 and 2002.

To track the effectiveness of the SCBG funding for the promotion of the Jersey Fresh brand a consumer awareness survey was undertaken following the completion of the 2012 Jersey Fresh growing season.

Princeton Partners of Princeton, New Jersey, in accordance with the State of New Jersey Department of Treasury guidelines, is the new designated advertising services provider to the Jersey Fresh program.

Princeton Partners retained the services of the research firm Bruno & Ridgeway to conduct the online consumer survey.

A copy of the completed "Awareness and Purchase Report" is included at the end of this report.

Free digital copies of this report can be obtained by contacting Logan Brown at; logan.brown@ag.state.nj.us. In the body of your e-mail request a copy of the Jersey Fresh "Awareness and Purchase Report."

The Executive Summary is below;

"The findings show that *Jersey Fresh* has a strong "brand" presence from a consumer standpoint.

Both awareness and purchasing of JF are fairly strong. While it is behind several long-standing national brands, it is within striking distance of those levels. Levels appear to have increased since 2002, most likely driven by in-store presence and the growth of farm markets.

Clearly there is a south to north pattern apparent in many of the key measures within New Jersey, South Jersey being the strongest area for JF.

Among those familiar with JF, overall positive perceptions rival those of the national brands.

In terms of specific JF crops, there is strength but opportunities exist to build them further.

Both awareness and purchase are greatest for tomatoes, followed by corn and blueberries. There is an opportunity to broaden the association of many other crops with Jersey Fresh.

Awareness and purchase of specific crops also follow the south-to-north pattern noted above.

The produce most readily associated with JF is also more likely to be considered superior to produce from other states.

There may be an opportunity to promote the superiority of other crops by emphasizing them as Jersey Fresh produce. The core needs of the consumer, when buying fresh produce, are freshness, taste/flavor and overall quality.

Being grown by local farms is currently lower in importance, along with longer shelf life. There may be an opportunity to link "local" to the core needs of freshness, taste and quality to help further differentiate Jersey Fresh and insulate it from national brands.

The current standing of Jersey Fresh should be used to refine goals for the future.

Consideration should be given to possible targets for increased growth of the Jersey Fresh brand, both in terms of the degree of growth expected and the specific geographies in which growth is desired.

Clearly, a broadening of crops that are associated with Jersey Fresh is an area of opportunity. "

Once the completed survey results are published a comparison of the actual accomplishments with the goals established will be included in the amended final report.

The following baseline data will be included in the amended final report;

1) "Does your supermarket ever identify or mark produce with the words Jersey Fresh. Yes. No. Don't know."
2) "During the past few months. Have you seen or heard any promotions or advertisements for Jersey Fresh fruits, vegetables or farm products? Yes. No."

Beneficiaries

In 2010 there were 10,300 farmers in New Jersey working 730,000 acres with the average farm size being 71 acres.

New Jersey produces about $250 million of fruits and vegetables every year and about $381 million of Nursery and greenhouse horticultural products. Every single grower of fruits, vegetables and horticultural products in New Jersey is a potential benefactor of the Jersey Fresh and Jersey Grown advertising programs.

The Specialty Crop Block Grants was utilized to expand the marketing of, and increase the demand for, New Jersey specialty crops through the advertising and promotion of the Jersey Fresh local branding program.

In 2004, a USDA funded Federal-State Marketing Improvement Program study documented the return on investment for the Jersey Fresh branding program. The study which drew upon the then twenty year history of the Jersey Fresh program documented that every dollar spent on the Jersey Fresh program, increased fruit and vegetable sector sales by $31.54. According to the 2004 study, increased sales in agricultural products created additional economic activity. The increased economic activity impacted other parts of the economy, namely agricultural suppliers and service providers. In fact each dollar spent on Jersey Fresh promotion resulted in an additional $22.95 of sales in agricultural support industries and other related industries. Therefore the total additional economic activity to be created by every dollar spent on the Jersey fresh promotional program created $54.49 in additional economic activity for New Jersey's agricultural economy. ("Returns to the Jersey Fresh Promotional Program, the Impacts of

Promotional Expenditures on Farm Cash Receipts in New Jersey," Ramu Godvindasmy, Rutgers the State University, March 2004.)

The potential impact of the $358,713.43 of SCBG funds utilized for the support of the Jersey Fresh advertising and promotional program could have been expected to yield an increase of $11.3 million in specialty crop sales in the State of New Jersey and another $8.2 million in additional economic activity for New Jersey's agricultural economy.

Lessons Learned

During the three year period of this SCBG project staff learned the need for flexibility in the implementation of this grant.

As the New Jersey state government cut expenditures for the *Jersey Fresh Matched Funds Program* the SCBG grant funds slated to be used to supplement that program would been supplanting funding for a recently defunded program thereby disallowing the use of SCBG funds for the Jersey fresh matched funds program. Working with the USDA/AMS/SCBG staff the NJDA project staff was able to redirect those funds to allowable print advertising expenditures.

Due to conflicts in the management of one of the sub-grantees a project that had previously been approved for SCBG funding by the New Jersey Vegetable Growers Association was later voted down by the same organization. Despite repeated efforts to secure a substitute approval from that organization the allocated funds were redirected to a more generic promotion of specialty crops through the Jersey Fresh program.

The importance of the project staff working pro-actively with the USDA/AMS/SCBG staff to address problems and delays in sufficient time to secure project amendments and/or extensions cannot be understated.

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SCBG Agreement # 12-25-B-0938

Tri County Cooperative Market Auction Association
Final Report
December 28, 2012

Project Title
"Creating efficiencies in Cooperative Auction storage and Distribution"

Project Summary
Tri-County Cooperative Auction Market Association is a produce auction/coop that began in 1934. It currently has over 50 members that sell product at the seasonal, night auction. The current open dock is used to sell product directly to customers both before and after the auction as well as to hold product overnight for buyers. In some cases pallets of product are delivered to the facility prior to the auction and stored on the dock as well. With improved security made possible by special equipment such as overhead doors fall items, including pumpkins, gourds, corn stalks and straw can be left at the facility for days and sometimes even longer. Being able to secure the very active open dock will reduce loss due to theft, which will in turn increase the comfort level of buyers that may purchase more than their trucks can hold. In addition it will facilitate the unloading of product at the farmer's convenience which will entice additional sellers.

The following projects were completed:
The creation of a secure area on the dock was accomplished by the addition of 12 overhead doors matched with the Cooperative's funding to replace a great deal of dangerous, week wooden floorboards. A chain link fence across the middle of the dock, with sliding gates, was also installed.

The CSA outgrew the 4 refrigerators before the grant money arrived. The allotment for the 4 small refrigerators was included in the installation of a cooler unit which was supported by a specialty block grant.

Project Approach
Approximately 2/3 of the flooring in the storage area was replaced as well as the steps leading up to the storage area. The completed project created a more level floor making it easier to move product on a pallet jack.

Twelve special purpose overhead doors were added to the storage area.
A chain link type fence now separates the area with the overhead doors from the open dock area.

The CSA program outgrew the 4 refrigerators planned. The allotment for the refrigerators was included into the installation of a cooler unit, which was partially funded by a

specialty crop grant. The cooler, originally planned at 29 x 15 or 29 x 20, was expanded to 29x37 in order to accommodate an increase in sales as well as the CSA.

Goals and Outcomes Achieved

The completion of the project has created a much needed storage area. This storage area has made it possible to expand the hours available for pickup and delivery of products. It has also allowed for an expansion in the products offered. Sellers of these additional products who may not have been able to be at the market during sale hours now have a safe and secure their items until such time that pick up by the buyer can be made. Sales have increased by having a secured area for storage and sales.

Beneficiaries

The potential impact of having a secured area on the loading dock will affected all coop farmer members as well as the over 300 buyers that frequent the auction.

The comparison in sales is measured by the 12 months prior to the project's completion to the 12 months following the project's completion. Sales pre-project were $1,015,000. Sales post-project were $1,068,000. This is a 5% increase. While this is not the 10% increase projected, this is a significant number and it is anticipated that it will continue to grow.

The auction's customer base has increased 8% in the twelve months post-project as compared to the twelve months pre-project. This increase is a result of having additional products and creating an opportunity for purchase beyond the limited hours of operation of the auction. Having a safe, secure selling dock for buyers to come and make their purchases has resulted in many smaller buyers being willing to make the trip. The upgraded dock has opened the doors to many potential buyers that just were not interested in an auction set up. It has also allowed the auction to create a marketing strategy to attract a more diverse kind of buyer. It is more welcoming environment to bring in the home consumer.

There has been a 5% increase in the number of growers. The auction 2 nursery growers and 2 greenhouse growers to our membership as a result of have a secure space to store product. The secure area has also allowed for more growers space to store ornamental products in the fall.

The increase in sales have benefited our members by creating an opportunity to expand their customer base by allowing for more convenient delivery times for both buyer and seller. As a result, buyers have been able to benefit from the increased availability and selection of products.

Lessons Learned

The completion of this project brought awareness to the importance of the direct sales aspect of the cooperative. The increase in sales despite the fact that only 5% of the total sales is coming from an auction format, has shown us that there is a demand for the higher level of service these type of sales provide. We are now able to take orders from

buyers, relay those orders to the grower and arrange a delivery and pick up time that is convenient for both parties.

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SCBG Agreement # 12-25-B-0938

The New Jersey Nursery & Landscape Association
Final Report
December 28, 2012

Project Title
"Promoting awareness of locally available Nursery and Landscape Products"

Project Summary
The New Jersey Nursery and Landscape Association, Inc.'s SCBG project intended to promote the Jersey Grown brand to consumers also to promote the utilization of the Jersey Grown brand to its members. The project accomplished this through promotion at trade shows, the printing of directories, newsletters plus a website and promotional materials.

The funds were utilized for the reprinting of our directory and quarterly newsletters to promote the "Jersey Grown" program directly to our members and other recipients of these marketing tools. The direct marketing campaign focused on marketing our Association to the general public by renting trade show space at a variety of flower and consumer shows throughout the year. "Jersey Grown" advertising was the focal point at these various shows. With the funds granted to us, the NJNLA was able to forge its own affiliated brand of "NJNLA Grown Plants" combining the already successful "Jersey Grown" campaign and making it more specific to promote the specific plants grown and marked by our members.

New Jersey's green industry employs over 53,000 individuals and has an economic impact of $4.3 billion dollars to the state's economy. It is vital to the economic health of this state that the leading agricultural sector (Nursery, Sod & Christmas Trees) be preserved and expanded over the next decade.

Project Approach
A significant amount of resources was spent developing an online version of the directory, diversifying the categorization and improving the experience of the consumer, either B2B or B2C, and making more information available. The online directory can be most directly viewed at: www.njnla.org/homeowner. This represented a change from the original proposal that better responds to technology use.

The NJNLA printed and distributed 2500 copies of their newsletter.

Rental of space at both professional trade shows and a consumer show made the Jersey grown Program visible to nearly 30,000 people in the past two years.

To assist in the promotion of a consistent marketing theme new graphics for the NJNLA were developed and incorporated in the association's website and promotional materials.

The NJNLA also worked to obtain licensing from the "Plant Something" program which originated with a SCBG project in the State of Arizona.

Dominick Mondi the Executive Director of the New Jersey Nursery and landscape Association oversaw the implementation of this grant project in close consultation with the NJNLA Executive Directors and other Board members.

Goals and Outcomes Achieved

Goals accomplished include:

Printing of the Annual Directory
The directory of NJNLA member growers was assembled and distributed to landscape contractors, garden centers, and industry leaders and educators around New Jersey. 800 copies of this directory were printed and distributed. Distribution ranged from wholesale growers who use the director to prospect clients, retail garden centers who used the directory to find new sources of plant material, and landscape contractors who used it as a source for New Jersey based suppliers. Additionally, information was included for all relevant state and educational entities making this book more than a listing of professionals, also a valuable resource to be held onto throughout the season. We also spent a significant amount of resources developing an online version of the directory, diversifying the categorization and improving the experience of the consumer, either B2B or B2C, and making more information available. The online directory can be most directly viewed at: www.njnla.org/homeowner

Printing of Newsletter
The first issue of our newsletter was printed in January 2011. It contained information about industry trends and reports from association leadership. In addition to normal distribution this issue was distributed at our annual trade show to all attendees. 1500 copies of this issue were printed and distributed. Since then we have continued to print our newsletter quarterly and in 2012 have expanded the project to a more graphic rich magazine format which is more appealing in both design and content to a broader audience of horticultural professionals and enthusiasts. This last January we again had an extended run of the magazine and distributed almost 1000 copies at our annual trade show and conference, NJ Plants.

Rental of Trade Show Space
Booth space was procured at the New Jersey Flower and Garden Show with a focus on promoting the jersey grown plants and professionals to the consumer. ~25,000 garden and landscape minded consumers attended the show. There were averaged two NJNLA members at the booth during the show. Show space was also procured at the NJ Plants

trade show for a second year in a row with the focus of elevating Jersey produced plants, above those plants produced out of state, and to New Jersey based buyers. ~1800 landscape and garden center professionals and potential buyers attended the show. This booth was attended to by an average of three members of the association. In additional to general networking, relationships were improved with the New Jersey Turf grass Association (in attendance as an exhibitor), the New Jersey Landscape Contractors Association (president in attendance and an exhibitor) and various members of the state department of Agriculture.

Personnel

Staff time was used to create the content for the website and printed promotional material and to review and approve graphic designs.

Plant Something License

The growing national marketing program, Plant Something, which was started under the SCBG program in Arizona, required a licensing fee be paid to the founding organization.

Consumer Website:

The website was introduced and all created and loaded.

The consumer facing website was created for the Plant Something Promotion. The new website was created as a Content Management System; so much of the content creation will be completed in house.

Revision of Graphics:

A graphic designer was hired to work on a new logo and graphic work. The new Plant Something! brand was integrated with the NJNLA logo to create a new set of graphics that can be used when promoting the New Jersey nursery industry to the public.

Promotional Materials:

A graphic designer created the logo and graphic work and started work on creating flyers, postcards, and other promotional material that can be distributed through consumer's shows and at retail locations.

Through this outreach effort to both the general public and New Jersey's nursery and landscape professionals, it was anticipated that locally grown nursery products and services will increase by 3%. This outcome was expected to be confirmed through the National Agriculture Statistics Service (NASS) using the most figures available during each advertising campaign item.

The 2007 benchmark for the value of New Jersey's sales of Nursery Crops for operations reporting more than $100,000 of sales in New Jersey in the year 2007 was $149 million. According to the United States Department of Agriculture, National Agricultural Statistic Services (USDA, NASS) New Jersey Field Office the value of New Jersey's sales of Nursery Crops for operations reporting more than $100,000 of sales in New Jersey in the

year 2010 was $170 million. This was an increase of more than 8 % which is almost three times the expected measurable outcome.

Beneficiaries

In 2010 Horticulture, Sod and Christmas trees represented 43% of all cash receipts for agricultural production in the State of New Jersey. The New Jersey Landscape and Nursery Growers Association is the largest organization representing that sector and represents the majority of that industry's producers in New Jersey.

New Jersey ranked eighth in the nation in expanded wholesale value of floriculture crops with a value of $178 million. The total crop wholesale value for all New Jersey growers with $100,000 or more in sales was estimated at $170 million up 7 percent from $158 million in 2009. These operations, which comprised 45 percent of all growers, accounted for 95 percent of the total value of floriculture crops. The expanded wholesale value of floriculture crops in the 15 major producing states totaled $4.13 billion for 2010, compared with $4.00 billion for 2009.

Lessons Learned

Although extensive progress was made on many goals from the original project proposal the New Jersey Nursery & landscape Association (NJNLA) had to request an extension from the September 30, 2012 deadline for the Specialty Crop Block Grant Award from 2010.

This extension enabled the NJNLA to take advantage of a well-established national program, the Plant-Something Campaign (http://www.plant-something.org/). Supported by a Specialty Crop Block Grant in Arizona originally, Plant-Something has been adopted by many states and provides a highly visible web-presence that can be used to support the promotion of Jersey grown plant material.

The project staff at the NJNLA learned the importance of proactively working with the USDA/AMS/SCBG staff to address serious program delays in order to obtain the necessary project extensions in order to complete the project within program guidelines.

It is widely recognized that the buying public today often turns to the Internet for information. NJNLA plans to take advantage of the already developed Plant-Something Campaign, bringing valuable information directly into the homes of New Jersey consumers. This shift to Internet use has intensified since the awarding of this grant.

Regarding the redesign of the NJNLA logo, it was determined that these funds could be better spent if applied to improve the Internet visibility of Jersey Grown plants.

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<u>Outer Coastal Plain Vineyard Association</u>
SCBG Agreement #12-B-0938
Final Performance Report
March 14, 2012

Project Title
"Increasing Competitiveness and Enhancing Sustainability of Viticulture in New Jersey"

Project Summary
Funds from this grant allowed our winegrowing organization to examine critical questions which are key to understanding the capability of New Jersey and in particular our Outer Coastal Plain AVA region to grow wine grapes competitively and sustainably. We established comprehensive GIS based maps of the climate, soil and landform data critical to viticulture in New Jersey. A site assessment tool to help in evaluating grape growing potential was developed as well. Two very successful symposia took place to examine our terroir in comparison to that of other established wine grape growing areas. Research priorities for wine grape growing were developed and rank ordered in importance.

As we stated in our proposal "The purpose of this proposal is to better position and expand the New Jersey grape growing community to meet the increasing demand for consistent production of high quality locally grown wine grapes."

Project Approach
The initial activity was to identify all grape growers in the state and conduct a survey of the acreage, varieties grown and management practices. The development of a web based mapping instrument was conducted in collaboration with researchers from Rutgers and Rowan University. The two symposia focused on regions for comparison with New Jersey and its Outer Coastal Plain AVA: Bordeaux and the Trentino-Alto Adige of northern Italy. One symposium included presentations on the economics of wine growing. The research priority survey was conducted by mailings and subsequent discussions during meetings of the Outer Coastal Plain Vineyard Association.

Grower's addresses and contact information were compiled from: 1) The membership list of the OCPVA, 2) the membership list of the Garden State Wine Growers Association, 3) the mailing list for the Rutgers Cooperative Extension Wine Growing Symposium "Grape Expectations", 4) a poll of Rutgers Cooperative Extension County Agricultural Agents for any grape growers not represented in the first three sources. A survey instrument was developed with the input of Rutgers Extension Specialists, Agricultural Agents, and Commercial Grape Growers. The draft instrument was administered verbally to six growers as part of the development and testing of the instrument. Further revision was performed and a hard copy version was prepared and sent to all the growers on the contact list. Non respondents were sent another copy of the survey instrument with a pleading letter.

Dr. Daniel Ward and Dr. Marilyn Hughes worked together to outline and define the content for the web mapping instrument. A survey of similar sites was conducted and the literature was reviewed for indices of site suitability. The ARC GIS system (Environmental Systems Research Institute, Inc. (ESRI)) was used to create a map of the entire state with information layers for each parameter of a site deemed important for grape growing. Data was collected from public sources and also purchased from private sources to provide a comprehensive array of information for site evaluation. Raw data was enhanced with expert input from Rutgers and Rowan University faculty. In addition to the individual layers of information an index of suitability was calculated and presented graphically as categories of suitability for each area in the state.

The two symposia were both held at Rutgers facilities (see attached programs for details). The first was held in the southern part of the state (80 attendees) and the second was held in the northern part of the state (60 attendees). Most of the coordination and planning was supervised and performed by Dr. Lawrence Coia of the OCPVA. At the symposia expert speakers brought the audience of New Jersey growers up to a new level of knowledge. The symposia provided forums that encouraged, and resulted in, extensive interaction and discussion between the audience and the experts attending. Members of the press attended resulting in articles that helped create an identity for the New Jersey wine industry for example the article "New Jersey Growers Look to Bordeaux" in the national trade journal Vineyard and Winery Management. The audiences left with an enhanced level of knowledge and a sharpened vision for the wine industry of New Jersey. Contacts made with the international experts led to the development of a USDA Specialty Crop Block Grant to import some new and interesting Italian grape varieties with tremendous potential for New Jersey. The speakers left impressed with the potential and accomplishments of the New Jersey wine industry, opening the door for further collaboration in the future.

Goals and Outcomes Achieved

All goals of the grant were successfully achieved. We have been able to establish a “Viticulture Map of New Jersey” (http://njvines.rutgers.edu) A link to it is on our website (www.outercoastalplain.com). That map serves to assist current and potential growers in choosing sites for vineyard locations based on climate, soil and landform data. It will also help assist in determining potential grape varieties that can be grown. The speakers at our symposia were world renowned experts in viticulture and enology. Both symposia were well attended. The comparison with Bordeaux entitled “Bordeaux- An Old World Terroir with Lessons for New Jersey” indicated perhaps more similarity of the Outer Coastal Plain AVA than any other region in the East USA. The Symposium “Successful Winegrowing in the Garden State- Selected Site, Variety and Economic Considerations” indicated that sites in New Jersey also may benefit from an understanding of the grape varieties and management practices of the Trentino Alto Adige. Important differences were also established that will further aid in selection of grape varieties and management practices. The information on acreage and varieties grown as well as research priorities will aid in development of future projects aimed at increasing competitiveness and enhancing sustainability

Presentations of the results of the state-wide survey have been made at the regular meetings of the OCPVA, enhancing the knowledge of all attendees as to the acreages of grapes, varieties planted and their locations. As a result of the information from the survey we have successfully obtained a USDA Value Added Producer Application Planning Grant to help develop a proprietary wine blend for New Jersey.
Note: Comparisons between the 2007 and 2012 quinquennial Census of Agriculture data for grape acreage in New Jersey will be extremely interesting to the industry and all associated persons, but we will have to wait to get it.

Note: During the course of this project there was a legislative situation that resulted in the delay of granting of winery licenses in the state. When this legislative situation was resolved 16 new winery licenses were issued. Because we had a baseline of only 38 wineries in the state, this large increase cannot be attributed to our efforts alone.

Note: Or project did not survey wine production in the detail needed for addressing these questions. Our primary focus was the viticulture and not the wine making and selling itself. The Division of Taxation has numbers for the gallons of wine sold, but to our knowledge, it does not collect data for the amount of New Jersey grapes in the wines sold. We were able to learn through the New Jersey Wine Industries Advisory Council's representative Lynn Coffin that the division of taxation reported that the total taxable and non-taxable gallonage of wine sold in the state went from 307,801 in 2009 to 405,954 in 2011. Although it may be tempting to attribute some of this increase to our project, it would be wholly inappropriate as many other factors are important to the wine market and the effects of our activities will take many years to manifest to their fullest.

The project ended at the end of 2011 so the website traffic estimates only cover the time until April of 2012. The OCPVA website averaged 38 requests per day in 2010, 54 in 2011, and increased to 270 in 2012.

Beneficiaries
The Outer Coastal Plain Vineyard Association and its 40 plus membership plus the entire winegrowing industry of New Jersey has benefited from the information this grant has provided. The exposure of our region as a potentially great wine growing region to experts in the wine industry has countless benefits in and outside our region. Local and regional consumers have benefited from a better understanding of the quality and potential of New Jersey wine. Based on the results of this project we have been successful in obtaining another USDA/JNJDA Specialty Block Crop grant which will aid us in importing new grape varieties from northern Italy which we will develop as proprietary. We have also obtained USDA-Value Added Grant funding to develop a proprietary blend for our AVA based on the red grape cultivars identified in this study.

Lessons learned
A sample of some of the interesting findings from this project is as follows:
(1) There are over 80 varieties of wine grapes grown in New Jersey

(2) The top 5 red wine grape Vitis vinifera or interspecies hybrid varieties in the Outer Coastal Plain AVA (by number of acres and number of growers) are –Cabernet Sauvignon, Cabernet Franc, Merlot, Chambourcin and Syrah.
(3) Our GIS based mapping tool for site suitability based on climate and soils indicates there are over 800,000 acres in New Jersey that can be considered suitable for grape growing. There were only just over 1000 acres of grapes growing in NJ in 2007 suggesting that the capacity exists for significant expansion of acreage.
(4) To increase competitiveness and enhance sustainability of grape growing in New Jersey we need to establish a strong infrastructure of educated growers and wine makers, concentrate on growing varieties of grapes that we can grow well and develop or obtain new varieties with excellent winemaking potential for the region.

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Additional Information

The work of the grant has been completed on time and on budget. The total budgeted grant amount of $39,960 has been spent in conducting this project. No additional funds or extensions are requested.

SBCG Agreement # 12-25-B-0938

Northeast Organic Farming Association of New Jersey (NOFA-NJ)

Final Report
December 28, 2012

Project Title
"Incubator Style New Organic Farmer Training Program"

PROJECT SUMMARY
According to the United States Department of Agriculture (USDA), the average age of American farmers is over 55 and continues to increase, while the number of young farmers under the age of 25 has declined by 30 percent. At the same time, new people are coming to agriculture and beginning farm enterprises; however, many of these new farmers do not come from farming backgrounds and may not possess the technical or hands-on skills needed to start a successful farming business. Production in New Jersey and eastern PA is constrained by a series of interrelated issues including land cost, labor availability, an aging farmer population, agricultural policies and programs, and an inadequate food distribution system for locally-grown organic food. The need for new farmers in support of the farming/food production systems has been recognized by many organic and sustainable farming organizations in the northeast region; lack of adequate training is a critical threat to locally produced food in the region. As a part of a larger beginning farmer program, one that connects new farmers to production knowledge and land, this project provided new farmers with a series of business training workshops, in order to increase the success of new specialty crop producers in New Jersey. Farmers were trained on the topics of the components of a business plan, the legal concerns of running a small business, risk management techniques, generally accepted accounting principles, using financial statements and ratios to assess business health, managing growth, financing options and considerations for succession planning. Each participant received an NxLevel® *Tilling the Soil of Opportunity* textbook, which contained a series of worksheets that build the framework of a business plan. The end result of the training is a viable business plan for small-scale, specialty crop production.

PROJECT APPROACH
Five trainings were held during the grant period, each approximately 30 hours, at two locations in the state: Duke Farms in Hillsborough and Pinelands Preservation Alliance in Southampton. Forty-four farmers signed up for the classes and thirty-six completed the program. Seven farmers who left the program did so because they chose not to pursue their business idea, one left after learning that she needed to flesh out her business idea before moving forward and the final participant left because he did not feel that he had the time to devote to the intensive course. Two participants have completed a business plan as a result of the course, three have reported that they are close to completing a business plan and the remainder are still in the investigatory stages of planning or have not responded to progress requests. Participants were sent a follow-up survey between ten months and a year after completing the course to ascertain any remaining business

planning support needs. Ten guest speakers attended the classes: two lawyers, an accountant, a farm market manager, a produce broker, two value-added producers, a New Jersey Department of Agriculture representative (Karen Kritz), and two Farm Service Agency representatives (Robert Maxwell and Matthew Pavone).

GOALS AND OUTCOMES ACHIEVED

Of the thirty-six farmers who completed the course, evaluations were collected from fifteen to nineteen, depending on the attendance of the session. Participants were asked whether they increased their knowledge on specific topics as a result of the class. 93% (14/15) reported an increase in knowledge on the importance of business planning; 93% (14/15) the components of a business plan and the research required for each section; 100% (15/15) reported an increase in knowledge on the legal considerations and liability areas of running a small business; 100% (19/19) reported an increase in knowledge on market research, product positioning, pricing strategies, public relations and marketing channels; 100% (18/18) reported an increase in knowledge on the importance of budgets, types of accounting systems, managing cash flow and interpreting financial statements; and 100% (18/18) reported an increase in knowledge on funding options and considerations for farmers. The type of information collected from participants increased with each offering, as it became clear that more information was needed to assess our success. The last offering identified learned skills and changes in behavior as a result of the class. 89% (8/9) of participants reported that they increased their ability to use financial ratios to evaluate financial standing and 78% (7/9) indicated that, as a result of the class, they would create financial benchmarks to use for financial analysis. 100% (9/9) reported that they would employ vertical and horizontal analysis to understand the components of their business and how they change over time, a skill that was presented during the workshop. 100% (10/10) indicated that they would now use cash flow projections to make management decisions and 80% (8/10) believed they increased their budgeting and record-keeping skills as a result of the class.

BENEFICIARIES

Of the thirty-six farmers who completed the course, twenty-four identified themselves as beginning farmers. Out of 12 respondents to an ethnicity question, 8 identified as White, 1 identified as Black/African-American, 1 identified as Asian/Pacific Islander and 2 indicated that they preferred not to respond. Eight respondents identified as female and four identified as male. As a result of increasing their knowledge on budgeting, financial planning, funding opportunities and risk management techniques, this course will enable these beginning farmers to more effectively start and maintain their farming business. One participant indicated that she “loved the diversity of speakers, and information,” and another commented on an evaluation that the course was an “awesome experience; changed my brain. Can’t say enough about its value.”

LESSONS LEARNED

After the first year of the grant period, it was apparent that the cost of the course was too high – this, combined with the loss of the only certified instructor in the state – caused a setback in the second year of the grant. It was also clear that the timing of the offerings, as far away from heavy production periods as possible, had a great effect on the number

of participants. In 2011, two offerings were cancelled in the fall, due to low registrations. After certifying a NOFA-NJ staff member to deliver the curriculum and restructuring the cost and timing of the course, we were able to complete three successful offerings in 2012. Collecting feedback from participants has also been a challenge. Electronic evaluations have been sent to participants from 2010 on two occasions, but there have been no responses. With this knowledge, evaluations were issued in paper form at the conclusion of each individual session for the last two sessions of 2012. This dramatically increased the response rate. The single greatest challenge has been collecting completed business plans from participants. The first year's incentive of a $200 rebate did not result in any finished business plans being submitted. After lowering the cost dramatically (from $600 for a NOFA-NJ member to $325), the rebate was lowered to $50. One participant did submit a completed business plan in early 2012 and one indicated that he completed a business plan but chose not to submit it. The instructor has planned follow-up sessions in February 2013 with twenty-two participants, in the hopes of spurring the completion of business plans started this fall.

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SCBG Agreement #12-25-B-0938
Final Report
Garden State Wine Growers Association
Submitted April 20, 2012

Project Title
"Marketing Support for Today's Wine Industry"

Project Summary
The project sought to further enhance and expand the "Passport Book" to the New Jersey Wine Country by making this very popular program a "working tool" for the New Jersey Wine Industry.

In addition, the project sought to support an increased marketing awareness of the GSWGA's "Jersey Fresh Wine & Food Festival" along with supporting greater branding/awareness of the New Jersey Wine Industry through several major media outlets.

As the fastest growing agricultural industry in New Jersey, the GSWGA is working tirelessly to support our members with marketing strategies and programs that further create awareness, showcase our products and drive increased sales of NJ Wines.

Continuing to develop creative and informative marketing tools that support the NJ Wine Industry on a year round basis is paramount to the GSWGA. With the support we have previously received, the Passport Book Program and Wine Trail Weekends have continued to grow in popularity. Being able to further redesign the Passport Book, to make it an all-encompassing piece, insured that the message about the NJ Wine Industry reached even more customers. This program in 2010 was extremely timely as the GSWGA continued to focus on their statewide branding & awareness campaign. Further supporting the enhancement of the Passport Book Program bolstered the awareness and participation of the Wine Trail Weekends.

The Wine Trail Weekends have become a very significant part of the economic landscape for many members of the GSWGA. These Wine Trail Weekends, taking place 4 times per year, bring patrons and customers into NJ Wineries to experience this important agricultural industry "at work". In addition this project's support of a greater marketing of the "Jersey Fresh Wine & Food Festival", in August at a member winery, was quite significant in our industry awareness campaign. Supporting this hallmark festival allowed the GSWGA to "get the word out" about the event and provided educational presentations, brought together noted speakers & authors, and embraced our partnerships (especially that of the Dionysian's International who lend great credibility to the benchmark the GSWGA has set for the quality of NJ Wine). Supported with the comprehensive marketing tool of the Passport Book, a statewide billboard campaign (paramount to our continuing statewide branding & awareness) and festival marketing, the Wine Trail Weekends and "Jersey Fresh Wine & Food Festival" certainly saw an increase in participation and substantiated the importance of the agritourism industry in

New Jersey (which is so vital to our state). The ultimate outcome of all of this effort was increased foot traffic to the NJ Wineries and Festivals which translated to increased sales of NJ Wines.

The Specialty Crop Block Grant Program positively affected all members of the GSWGA. This helped all 34 active wineries and vineyards in full operation throughout New Jersey. It also significantly affected those who have received a winery license from the state (approximately 14 -15 open licenses currently stand) and are working to become full operating businesses. This project positively affected the awareness and support of the NJ Wine Industry by the general public and that translated into increased sales. The economic impact of this was two-fold: more vibrant and successful NJ Wineries (a positive for agriculture in NJ) and more dollars staying within our state's borders. As NJ Wineries increased their sales they have the ability to grow thereby ultimately affecting land use (grape growing), land preservation, employment and the like. While the NJ Wineries are the obvious beneficiaries of this project, the residents of our state were also positively impacted by NJ Wine Industry success.

Project Approach

By enhancing the effectiveness of the "Passport Book" so that it serves as a real "marketing tool", along with increasing the marketing support for a hallmark festival (Jersey Fresh Wine & Food Festival) and focusing on increased industry branding/awareness of the NJ Wine Industry the GSWGA seeks to showcase the wine industry individual operations while at the same time presenting a unified branding effort to potential customers.

New Jersey Wine Industry "Passport Book" Re-design

The "Passport Book" to the New Jersey Wine Country was further enhanced and expanded to include historical information about the wine industry in New Jersey, more in depth descriptions about each member winery, and provided resourceful information about companion industries (B&Bs, restaurants, etc.). This enhanced Passport Book became a real "working tool" for the wineries throughout New Jersey. In addition, it is now one of the most resourceful and popular pieces of information put forth by the GSWGA about the New Jersey Wine Industry. The Passport Book remains the cornerstone of all marketing for the very popular New Jersey Wine Trail Weekends as it is truly an "all-encompassing marketing tool". Consumer reaction to the expanded and redesigned Passport Book has, again, been overwhelmingly positive with more than 35,000 copies distributed in the first printing. The GSWGA has also seen a marked increase in the number of completed books returned in one year, up more than 20% from previous years. This is a great indication of the popularity of this program and of the NJ Wine Industry.

Festival Marketing Support

The GSWGA was extremely pleased with the impact the additional marketing dollars, provided through the grant, had on the awareness and response to the annual "Jersey Fresh Wine & Food Festival" held at a member winery in 2010. The GSWGA was able to "get the word out" very effectively through radio, print, internet and long lead

publications about this hallmark festival. This festival hosted by the GSWGA brought the NJ Wine Industry together with noted speakers & authors, provided educational sessions and embraced our agricultural partnerships. In 2010 this event saw nearly a 35% increase in attendance…there is no doubt that the additional marketing dollars were key to this success.

Industry Branding/Awareness

The GSWGA effectively promoted the New Jersey Wine Industry through several major media avenues including print, radio and large advertising vehicles. Making a commitment to overall industry branding & awareness in 2010, the GSWGA put itself forward in the presences of consumers throughout New Jersey. Anchored by a "NJ Governor's Tourism Award" winning campaign, the GSWGA sought to make its place known. The GSWGA saw the year of 2010 as a time of "coming of age" for the whole New Jersey Wine Industry. Utilizing funds from this grant the GSWGA placed a series of ad campaigns in NJ Transit locations, bus/trolley mobile boards, interstate transit locations and strategic billboard opportunities around the state. The strategy of creating a "high awareness" campaign for the Passport Book program and NJ Wine Industry (by way of extensive internet placement, publications, radio marketing and billboards) proved to be overwhelming successful.

Goals and Outcomes Achieved

The "Passport Book" was expanded and enhanced to make it a cornerstone piece of the overall marketing efforts for the GSWGA-it became a complete and useful overall marketing "tool" for the GSWGA. To date, more than 40,000 copies of the Passport Book have been distributed.

Recognizing that the NJ Wine Industry has "come of age" the marketing efforts spent to highlight a hallmark festival, Jersey Fresh Wine & Food Festival, along with a major media focus on the NJ Wine Industry brought a substantial increased awareness and reinforced a consistent branding effort to support the industry. Overall attendance at festivals and wine trails increased by nearly 20% during this time period. The numbers of people reached by the festival advertising and industry branding efforts can be estimated to be more than a million.

Beneficiaries

With 34 operating wineries New Jersey remains the fifth largest wine producing state in the U.S. Certainly these members, and those who have joined since the grant was initiated, have benefited greatly from the increased support and awareness.

Lessons Learned

Wine consumers, and consumers in general, utilize pieces like the Passport Book as a means to really understand and appreciate the wines/wineries found throughout New Jersey. The Passport Book has become a great "tool" for educating the consumer about NJ wines, the great history of winemaking in NJ and as a means to recognize NJ as a wine producing state. Tied together with the marketing of a hallmark event and general

branding awareness of the NJ Wine Industry this type of unified & multi-dimensional advertising helps give the industry a common brand as the Garden State Wine Growers Association.

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SCBG Agreement # 12-25-B-0938

New Jersey Peach Promotion Council
Final Report
December 28, 2012

Project Title
"Advertising and promotion for New Jersey peaches"

Project Summary
For the past 62 years, the New Jersey Peach Promotion Council has conducted successful marketing and promotional campaigns for the advancement of the peach industry in New Jersey. Our success in recent years has been in promoting the quality of locally grown *Jersey Fresh* peaches; compiling *the Peach Buyers' Guide* and distributing it to retail facilities; planning and hosting various media events; coordinating retail promotional events; providing education and information to consumers, buyers and the media via print advertising, website information, and personal contact and the development of new ideas and peach products it increase peach movement and consumption.

Our goal is to continually expand the scope of our promotional campaign by incorporating new promotional activities into our program; to maintain a fresh and viable marketing theme; to maintain a viable and up to date website, providing more information and interaction to users; to continue with and expand on our educational outreach and dissemination of industry information which have proven to be successful endeavors in recent years; and to have a larger impact, overall, on our target audiences.

Our focus will continue to be on in New Jersey and the metropolitan Philadelphia and New York areas but some of our efforts may go beyond these geographical territories like Canada, Metropolitan Boston and the Washington/Baltimore corridors.

The peach industry in New Jersey faces an increasingly competitive market. New Jersey is ranked 4th in fresh peach production and acreage in the United States. Less than 1% is sold for a peach processed product. California, and South Carolina are rank-1st and 2nd respectively and Georgia third in peach production. Fresh peaches peaches from these three states, as well as other states, compete in New Jersey peach markets at the same time as New Jersey peaches are available. In addition, the New Jersey peach industry faces competition from many other produce commodities on the limited shelf space in the produce section of major retail establishments. The majority of fresh peaches are marketed by large food retailers who may require services for the grower and packer on traceability barcoding, packaging labeling and snickering, inventory management, pricing and other services and other general management services at a higher cost. Many intermediate and small packers cannot provide these services. This may give their competing states and commodities a significant edge on wholesaling peaches

It is crucial to the viability of the New Jersey peach industry that we reach consumers, enticing them to request or demand more NJ peaches particularly form larger retailers.

Likewise, it is important that we induce retailers with various promotions, other techniques and point of sale material to focus on carrying peaches grown and harvested in New Jersey. We need to foster an environment in which New Jersey's peach industry will be sustainable and profitable.

This project focuses on creating and maintaining awareness about the New Jersey peach industry and the quality attributes of New Jersey peaches leading to strong consumer recognition and strong buyer support which will help keep the New Jersey peach industry viable. The New Jersey peach industry cannot assume that by being in the backyard of millions of potential consumers that it will get the support of consumers and buyers, the industry must proactively educate and promote the benefits of the industry to key target audiences. The project also has a focus of utilizing new promotional tools, e.g. social media, as well as exploring opportunities for new market channels.

As supermarkets more and more purchase peaches by price, it became obvious that locally grown Jersey peach purchases must be consumer-driven. If consumers demand our Jersey peaches, supermarkets will be more inclined to sell them. Additionally, growers increasingly sell their produce, including peaches, directly to consumers, at their own farm stands and at community farmers markets. It is obvious that consumers need to be educated on the benefits of seeking out Jersey-grown peaches, the season of their ripeness (July-Sept) and the various venues where they can be purchased.

The season is relatively short and must be promoted for maximum impact.

The previous 2009 grant had some of the strategies and objectives of this grant but prior to that day many of these things could not be accomplished and peach movement was poor to fair. The 2008 census of agriculture will substantiate the state of the industry and the decline in peach orchards in the state/

Project Approach

New Jersey Peach Promotion Council's activities and tasks were all geared to building public awareness and demand for our grower's crops. Specific tasks included

◄Creating and placing ads in strategic newspapers and radio that would reach every part of New Jersey and the New York/Philadelphia metropolitan areas;

◄Creating and implementing special public events that would call attention to and help sell Jersey peaches;

◄Reaching food and industry writers and commentators to do various features on Jersey peaches.

◄Building awareness and loyalty among retail/supermarket produce buyers by offering services, information and sales material to sell NJ fresh peaches

To accomplish the project the following special events were coordinated:

EVENT DATE	*MARKET*	*ACTIVITIES, EVENTS*
July 21	***ShopRite, Washington Township*** *Route 31 in Washington Township*	*9 am-3pm: BBQ-Farmers market. featuring New Jersey Peach Queen, grilling peaches & corn, bringing in farmers, giving away*
July 24-29	***Gladstone Tavern Gladstone*** *273 Main St, Gladstone www.gladst*	*Peach Week. An entire menu of peach dishes, from cocktails to dessert and all in-between. 3-course dinner, $25.*
July 26	***NJ Peach Festival-Gloucester County 4-H Fair*** *275 Bridgeton Pike (Rte. 77 S), Mullica Hill http://www.gc4hfair.com*	*Peach displays, Peach Queen and Little Miss Peach crowned, activities, home-made foods and more*
July 26	***Long Valley Green Market*** *20 Schooleys Mountain Rd www.longvalleygreenmarket.com/gloucester.njaes.rutgers.edu/fairfest*	*Peach Party. Special activities, tastings, kids' activities and more.*
July 28	***Haddonfield Farmers Market*** *Kings Court, Haddonfield NJ 08033 www.haddonfieldfarmersmarket.org*	*Peach Party. Special activities, music, tastings, kids' activities and more.*
July 28	***Sergeantsville Farmers Market*** *Rts 604 & 523*	*"Taste of the Market": 4-H peach pie contest , other activities*
July 29	***Holtzhauser Farms, Mullica Hill*** *74 Woodland Ave. Mullica Hill call Blue*	*5 pm-Peach Barbecue, prepared by Chef Jim Malaby, Blue Plate Restaurant*
Aug 1	***Woodbridge Farmers Market*** *Lower Sacramento Road*	*Peach Party, with special peach dishes & dessert prepared by Mulberry Hill Restaurant and more.*
Aug 3	***Trenton Farmers Market*** *960 Spruce Street, Lawrenceville www.thetrentonfar*	*Peach Day--all day. Free peach desserts, starting at 10 am, Special activities, peach tastings, kids' activities and more.*
Aug 3	***Boonton Main Street Farmers Market*** *www.BoontonMainStreet.org*	*"Putting on the peach" 4 - 9 PM. August First Friday promotes the humble peach with peach samplings, passport to summer*
Aug 4	***Boonton Farmers Market*** *Upper Plane Street Parking Lot, Main St (gps address 808 Main) www.boontonfarmersm*	*Peach Fest: peach samplings, kids' activities; used book sale; special give aways.*
Aug 4	***Montgomery Farmers Market***	*Peach Party: Special activities, peach*

The number of people participating in each event varied but with an average of about 100 people per event a total of 2,600 consumers participated in the special events.

Goals and Outcomes Achieved

Annual Visits to promote New Jersey Peaches;

◄ *Twenty-two annual visits to produce directors or buyers of supermarkets and produce distributors were conducted. The Peach Promotion Council will continue these visits, as reminders that there is public demand for Jersey peaches and Jersey peaches are in a class by themselves, distinct from peaches grown elsewhere.*

Supermarket Display Contests

Supermarket display contests of New Jersey peaches were organized in three stores. The independent store Pennington Market, a Kings Supermarkets and a Shop-Rite. More than six thousand consumers saw the displays.

Facebook

The Jersey Peach website has 150 likes and the most popular demographic is 35 to 54 year olds and the busiest month for the website was August 2012.

Postings to Jerseypeaches.com

NJPPC- WEBSITE TRAFFIC: 2012 compared to 2011

2012 *Month*	*Page Views*	*Visits*	*Hits*		***2011*** *Month*	*Page Views*	*Visits*	*Hits*
July, 2012	*8,616*	*8,411*	*102,291*		*July, 2011*	*0*	*0*	*0*
August, 2012	*7,509*	*8,033*	*81,398*		*August, 2011*	*1,407*	*1,509*	*16,742*
September, 2012	*5,508*	*6,146*	*24,542*		*September, 2011*	*4,959*	*5,364*	*32,473*
October, 2012	*5,370*	*5,559*	*14,317*		*October, 2011*	*5,363*	*4,941*	*18,576*
Total(s)	*27,003*	*28,149*	*222,548*		*Total(s)*	*11,729*	*11,814*	*67,791*
Average(s)	*6,750*	*7,037*	*55,637*		*Average(s)*	*2,932*	*2,953*	*16,947*

Print collateral materials

Print Collateral-banners and Point of sale material: Peach Promotion Council (PPC) created, wrote and printed brochures which were offered at all venues selling Jersey peaches. These were offered by email and press releases to the produce trade publications.

PPC also wrote and published an annual "Peach Buyers Guide" that is distributed to growers, shippers, packers, and supermarkets.

NJPPC also designed and printed banners, which were offered to the same purveyors at cost lower than actual print cost.

◀*Banners: 25-- provided to farmers markets, supermarkets, upon request*
◀*Brochures: 2,000—provided to supermarkets, farmers markets, restaurants, conventions*
◀*Peach Council Buyers Guides: 1,200—sent to supermarkets, growers, used at conventions, etc.*

Peach Promotion Events

Eight peach promotional events were conducted in 2010
Twenty-five peach promotional events were conducted in 2011
Thirty-one promotional events were conducted in 2012

Each peach promotional event attracted between 500 – 5,000 participants. With an average of 1,000 per event an estimated total of 64,000 people participated in the peach promotional events.

◀Ads were placed in 14 Print outlets including 1 daily newspaper, 2 radio stations, 2 magazines, 9 local weekly newspapers, covering all New Jersey and eastern PA. Ad placement varied slightly over the 3-year period.

◀Public relations outreach was conducted to all New Jersey/New York/PA metropolitan media, including newspapers, TV, radio, social media (website, Facebook). This was done by press an annual series of press releases and personal contact with editors, reporters and broadcast producers.

◀Press releases including a calendar of events, kid's quizzes, fact sheets, history of Jersey peaches, season's start, recipes and preparation advice, nutritional value of peaches, etc. were created and disseminated. The press releases were distributed to all media in New Jersey, New York City and eastern Pennsylvania, gaining coverage in newspapers, on radio, TV and Facebook. All press releases and the events calendar were also posted on the Peach Promotion Council website, www.jerseypeaches.com Events calendar was placed on New Jersey's tourism website, "VisitNJ.com"

◀**A c**omplete website revision and ongoing monitoring was conducted. 2012 increase in page views was 15,274 more than 2011; increase in hits was 154,757 more than 201l.

◀Ads had obvious public impacts, as evidenced by increased traffic on website immediately following appearance of ads.

◀Public relations outreach: The 2012 result was 53 editorial mentions and/or features reaching a total readership/viewership of 4,569,459+

◀Annual series of press releases: Media coverage was very strong from season's beginning in mid-July through the end of August, ranging from writers interviewing growers and sellers, radio interviews and special listener promotions; TV appearances both in-studio and at various grower orchards, community farmers markets and supermarkets.

Special peach promotion events were conducted at twenty-nine community farmer markets and at the New Jersey Peach Festival and the

The encouraging result of these various promotional efforts was apparent in increased public awareness of "Jersey Peaches" compared to just "local" or just "peaches," evidenced by several entities contacting the Peach Council wanting to hold a Jersey Peach event, having heard about our promotions from others.

Over the length of the project an increase was seen in wholesale prices for New Jersey Peaches. The average price for Peaches in 2009 was $1020 per ton (51 cents per pound) period. In 2010 this was 920 per ton(46 cents per pound). In 2011 wholesale prices were $1220 per ton (61 cents per pound). Figures are not complete for the final 2012 figures but according to the USDA Market News Service early season NJ prices were 65 cents per pound or $1300 per ton. The 2012 harvest season in NJ was 2 weeks early so these prices are probably fairly accurate because we did not see a drop off in prices or movement throughout July and August according to a small survey of growers and shippers done by NJPPC. Usually retail prices follow those recorded wholesale prices. We have seen a decline in the numbers of growers during the period of this grant but a constant of about 6500 to 7200 acres of peaches and nectarines. IN the 2007 census New Jersey had 6,638 acres of peaches on 249 farms.

According to USDA market News weekly shipment reports we shipped more peaches in 2012 that we did in 2011. Movement was both steady and demand strong in these two seasons. Demand was strong in 2012.

Most of the data is mentioned previously USDA NJASS statistical information and USDA Market News. The only other data we is informal survey data we collect from growers and shippers in NJ. IN our informal surveys 7 directors felt all of our strategies were making and impact

Expected Measurable Outcomes
Twelve hundred buyers guide booklets were printed and distributed directly to wholesalers and retailers of peaches.

Point of Purchase and sale materials were distributed to 79 retail supermarkets and twenty-five farmers markets.

The total number of website hits to the NJPPC website rose from 67,791 in 2011 to 222,548 in 2012. An increase of 328 %.

In 2011 and 2012 a total of twenty-two visits were conducted with major wholesalers of peaches in New Jersey.

Beneficiaries
Growers continue to benefit from PPC outreach, as evidenced by the following statement from a grower selling at a community farmers market: " *"Had it not been for the "Special*

peach events" at the markets where I sell, I would be out of business. On these special days, I put on extra help and sell out my supply." His endorsement speaks volumes for the marketing and promotional efforts of the New Jersey Peach Promotion Council. The majority of farmers markets holding special peach events repeat them and expand them annually.

Supermarkets are beginning to see benefits of PPC outreach: One supermarket produce buyer reported, "*ShopRite customers begin asking when Jersey peaches will be in around July 1st and they demand these throughout the season. We sell all we can stock."*

The wholesale value of NJ Peaches in 2009 was $33,660,000; in 2010 was $31,280,000; in 2011 was $36,880,000 and with early season 2012 prices will be $40,000,000.

If we had a way of tabulating retail prices they would be substantially higher value for the peach crop. This latter figure is very important for NJ because we have almost 8 million people in New Jersey and almost 60% buy food in the supermarket. Based on informal survey work done in New Jersey with growers, we find a greater percentage of them are selling retail directly through an on farm market or agritourism enterprise, or a community farmers market. This equates to a higher on farm return for their product not reflected in wholesale prices. The New Jersey Peach industry is represented by 249 farms with approximately 7,000 acres of fresh market peaches and nectarines. Approximately 60 % of the farms are members of the NJPPC.

Lessons Learned

Our industry is targeted to the fresh market. Because we grow non melting free and clingstone peaches we have not been able to develop a significant industry for value added and other processed peach products

This section is meant to illustrate the positive and negative results and conclusions for the project.

I think never before in the history of our peach industry have we had a greater percentage of our industry acreage as members of the NJPPC and our promotional efforts for the industry

We can note by wholesale prices received and movement we have increasing difficulty moving peaches in September and October. In spite of our best promotional efforts we cannot get the large retailers to promote peaches in volume in these months as they did for many years.

We have not been successful in developing value added products for peaches that will move large quantities of commercial grade fruit.

We have needed to develop and fund market research to determine better impact of our efforts. Much of the statistical date that used to be collected is no longer available

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Awareness and Purchase Report

January 2013

Produced by:

for:

#8209

Background Information

Background and Research Objectives

- Princeton Partners, as the agency of record for the New Jersey Department of Agriculture (NJDA) is conducting a tracking study to understand consumer awareness and perceptions of the “Jersey Fresh” (JF) program.

- In the past, supermarket intercept studies have been conducted to track the efficacy of the “Jersey Fresh” campaign; the latest conducted in 2002. This research was conducted to provide a benchmark understanding of current consumer perceptions of the JF program and to help understand its strengths and identify areas that may represent further enhancement opportunities.

Methodology and Sample

- This study was conducted online among a randomly selected sample of consumers who met the qualification criteria.

- A national online panel was utilized as the sample source for this study. We targeted all NJ counties (setting representative quotas based on population), PA (Bucks and Montgomery counties and the Philadelphia Metro area) and Staten Island, NY.

- The 2002 study consisted of roughly 800 interviews, 700 in NJ and 50 each in the other 2 markets. In this survey, 823 surveys were completed, 620 in NJ, 152 in Pennsylvania and 51 in Staten Island.

Methodology and Sample

- To qualify for this study consumers must be the "primary grocery shopper," doing at least 50% of the shopping for the household, with an annual household income of at least $40,000.
- The survey took approximately 10 minutes to complete.
- Interviews were conducted December 18, 2012 – January 7, 2013

Analytical Note: While some comparisons are being made in this report to the 2002 survey, this survey should be viewed as a benchmark wave for the current JF effort. The data collected for this study may not be directly comparable to prior waves. This is due to two factors:

- First, a more rigorous sampling plan was employed and better reflects the entire state.
- Secondly, the methodology was shifted to an online interview which has become the "standard" since 2002.

Executive Summary

The findings show that *Jersey Fresh* has a strong "brand" presence from a consumer standpoint.

- Both awareness and purchasing of JF are fairly strong. While it is behind several long-standing national brands, it is within striking distance of those levels. Levels appear to have increased since 2002, most likely driven by in-store presence and the growth of farm markets.
- Clearly there is a south to north pattern apparent in many of the key measures within New Jersey, South Jersey being the strongest area for JF.
- Among those familiar with JF, overall positive perceptions rival those of the national brands.

In terms of specific JF crops, there is strength but opportunities exist to build them further.

- Both awareness and purchase are greatest for tomatoes, followed by corn and blueberries. There is an opportunity to broaden the association of many other crops with Jersey Fresh.
- Awareness and purchase of specific crops also follow the south-to-north pattern noted above.
- The produce most readily associated with JF are also more likely to be considered superior to produce from other states.

There may be an opportunity to promote the superiority of other crops by emphasizing them as Jersey Fresh produce.

Executive Summary

The core needs of the consumer, when buying fresh produce, are freshness, taste/flavor and overall quality .

- Being grown by local farms is currently lower in importance, along with longer shelf life.

There may be an opportunity to link "local" to the core needs of freshness, taste and quality to help further differentiate Jersey Fresh and insulate it from national brands.

The current standing of Jersey Fresh should be used to refine goals for the future.

- Consideration should be given to possible targets for increased growth of the Jersey Fresh brand, both in terms of the degree of growth expected and the specific geographies in which growth is desired.
- Clearly, a broadening of crops that are associated with Jersey Fresh is an area of opportunity.

Summary of Key Measures and Benchmarks

Awareness of "Jersey Fresh" is very high and JF has a positive image among those who are familiar with it. Despite the fact that there is not a current promotional campaign, a good proportion of consumers believe they've seen the brand promoted or advertised in the past 6 months, most likely due to POS messages.

Summary of Awareness and Purchase of Jersey Fresh Produce

		New Jersey							
	Total	Total (A)	North (B)	Central (C)	South (D)	Pennsyl -vania (E)	Staten Island (F)	2002 Benchmark	2014 Target
Base: Primary Grocery Shoppers	(823)	(620)	(274)	(211)	(135)	(152)	(51)		
	%	%	%	%	%	%	%	%	%
Total Awareness of "Jersey Fresh"	78	83[EF]	78	82	95[BC]	61	59	NA	TBD
Unaided (Top of Mind) Awareness	1	1	*	1	2	1	-	NA	TBD
Recall of Past 6 Month Ads/Promotion	26	29[EF]	22	27	46[BC]	18	12	41	55
Have Purchased "Jersey Fresh"	66	73[EF]	68	72	84[BC]	47	35	NA	TBD
More likely to purchase produce identified as Jersey Fresh/Jersey Farm	66	70[EF]	65	72	77[B]	56	47	45^	70
Likely to ask for Jersey Fresh/Jersey Farm if not in store	51	54[EF]	53	57	53	43	29	40	56
Store identifies products as "Jersey Fresh"**	65	68[EF]	68	67	71	51	43	53^^	TBD
Jersey Fresh rated "Excellent/Very Good"**	81	80	80	80	82	86	77	NA	TBD

*Less than 0.5%.
**Based on those aware of "Jersey Fresh."
^ In 2012 rated extremely, very or somewhat likely; in 2002 rated very or fairly likely.
^^2012 asked those aware of Jersey Fresh "Does the store where you purchase the majority of the food for your household identify any products as 'Jersey Fresh'?"; 2002 asked, "Does your supermarket ever identify or mark produce with the words 'Jersey Fresh'?"
(A/E/F)(B/C/D) = Significantly greater than indicated column at the 90% confidence level.

Key Measures – Thoughts

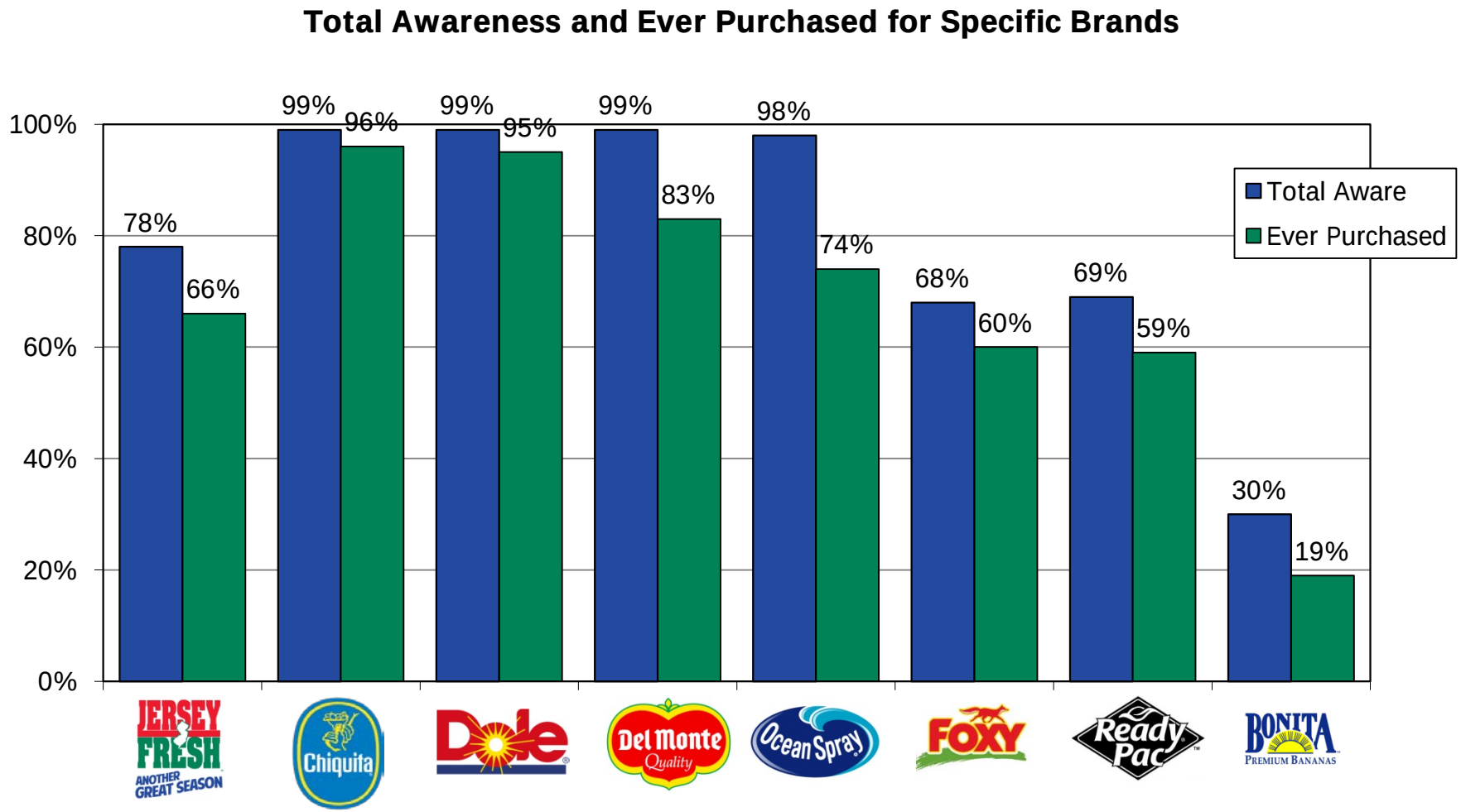
When examining the current level of key measures, a number of insights emerge.

- First, there would appear to have been growth since 2002. This could be attributable to many factors, including basic shifts in consumer thinking about food since 2002.
- Secondly, a clear pattern emerges in awareness and purchase within NJ (south to north) and across PA and Staten Island.

These factors should be consider as goals are set for the new campaign. Said another way, which measures should be targeted, where, and what new levels are achievable? Clearly, advertising awareness can be increased in all geographies. However, the potential for growth in south NJ, on some measures, is limited. These findings suggest that the current state of the JF "brand" needs to be considered, as goals and tactics are set for the future.

Awareness, Purchase and Perceptions of Jersey Fresh

Jersey Fresh is currently in an advantageous position, in terms of awareness and purchase, to compete with national brands once a promotional campaign is re-introduced.



Q.3: Which of these brands of fresh fruits and vegetables have you ever purchased?
Q.4: Although you may not have purchased them, please indicate if you have ever seen or heard of each of the following brands when shopping for fresh fruits and vegetables.
Base: Primary Grocery Shoppers (823).

Awareness and purchase of Jersey Fresh appear to be geographically correlated. The farther south shoppers reside, the more likely they are to recognize Jersey Fresh and purchase Jersey Fresh produce. Conversely, the Foxy brand is more recognizable in north and central regions. Other brands are flat, geographically.

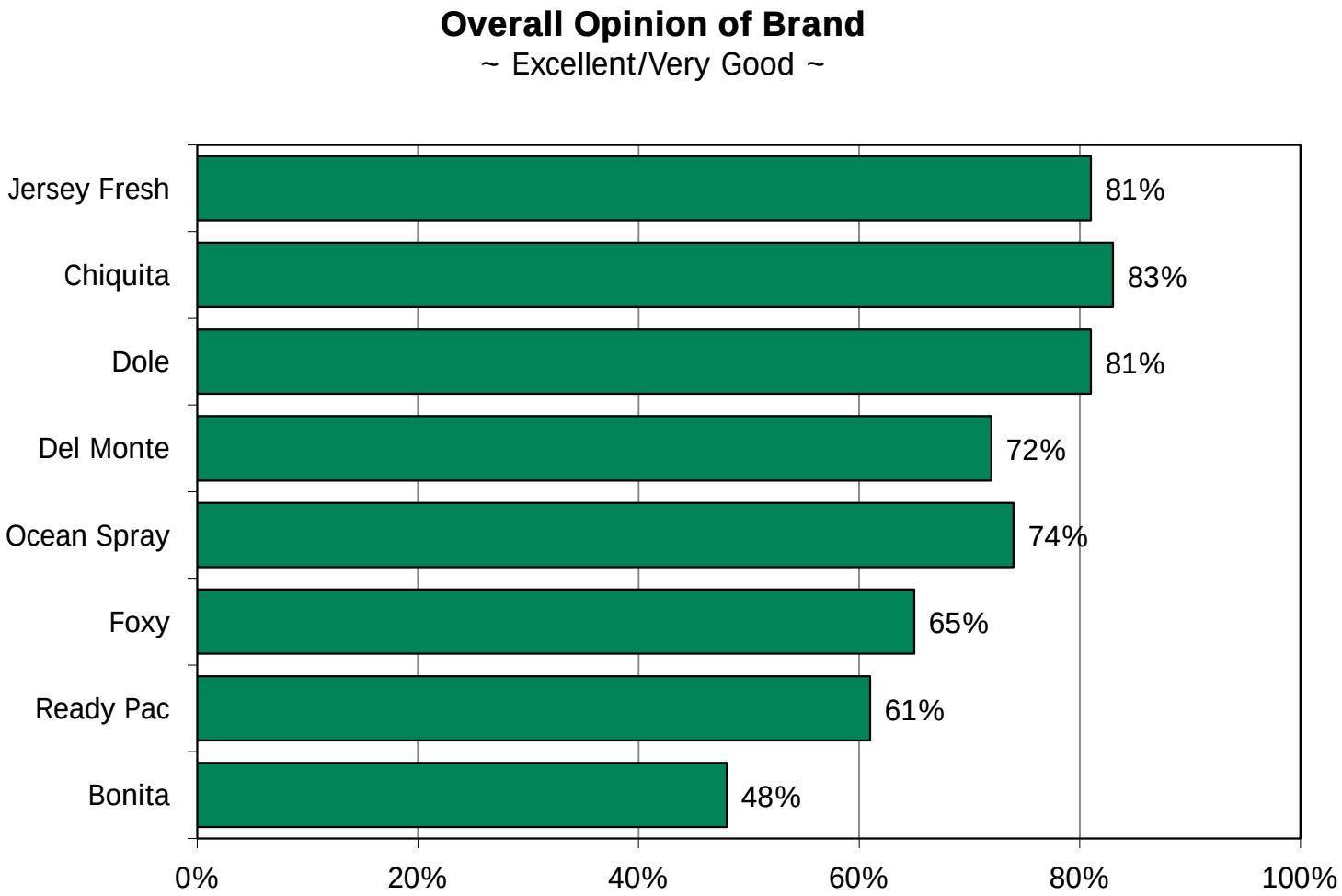
Total Awareness and Ever Purchased for Jersey Fresh and Foxy

~ By Geographic Region ~

		New Jersey					
	Total	Total (A)	North (B)	Central (C)	South (D)	Pennsyl-vania (E)	Staten Island (F)
Base: Primary Grocery Shoppers	(823)	(620)	(274)	(211)	(135)	(152)	(51)
	%	%	%	%	%	%	%
Jersey Fresh							
Total aware	78	83[EF]	78	83	95[BC]	61	59
Ever purchased	66	73[EF]	68	72	84[BC]	47	35
Foxy							
Total aware	68	69[E]	78[D]	78[D]	36	58	86[AE]
Ever purchased	60	62[E]	71[D]	69[D]	33	47	80[AE]

Q.3: Which of these brands of fresh fruits and vegetables have you ever purchased?
Q.4: Although you may not have purchased them, please indicate if you have ever seen or heard of each of the following brands when shopping for fresh fruits and vegetables.
(A/E/F)(B/C/D) = Significantly greater than indicated column at the 90% confidence level.

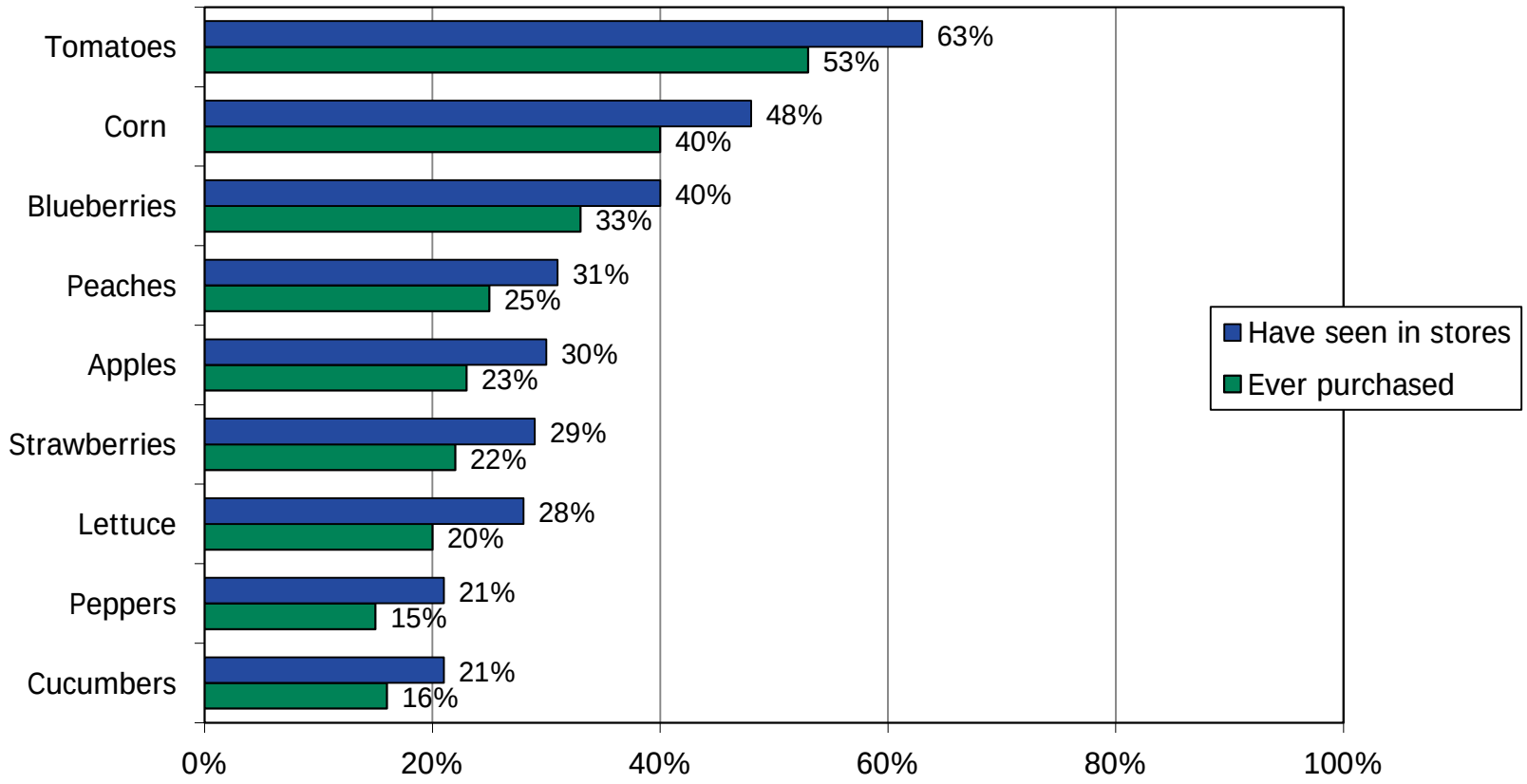
Jersey Fresh holds a very positive image among those who are familiar with the name, comparable to that of produce giants, Dole and Chiquita.



Q.5: What is your overall opinion of each of the following brands, based on everything you have seen or heard?
Base: Those Aware of Each Brand (Chiquita=811, Jersey Fresh=638, Dole=820, Del Monte=813, Ocean Spray=806, Foxy=560 Ready Pac=569, Bonita=243).

Tomatoes, corn and blueberries are the crops most widely associated with Jersey Fresh labeling. Clearly, opportunities exist to promote other crops as being "Jersey Fresh."

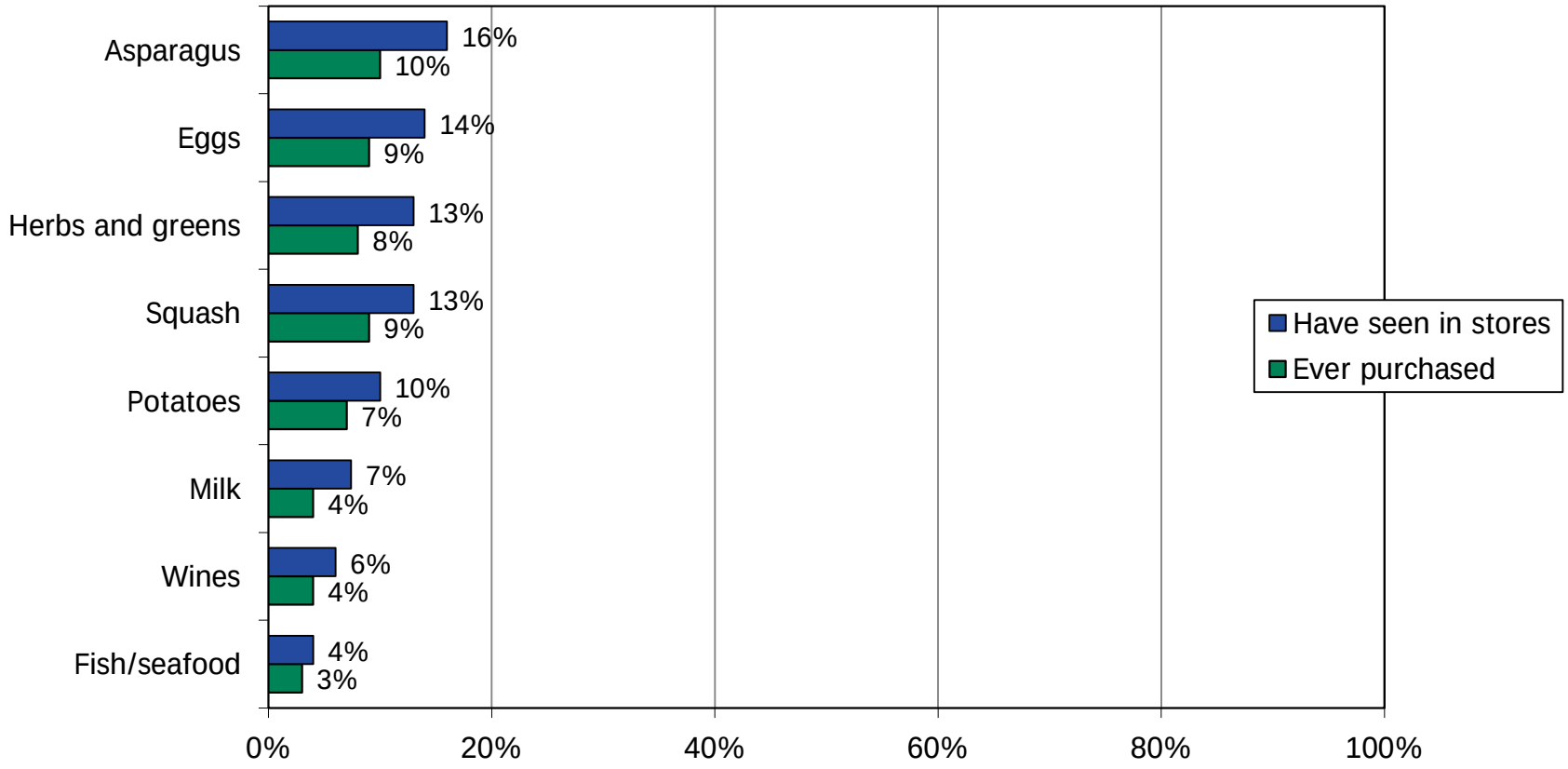
Percentage Who Have Seen in Stores/Ever Purchased Items Sold as Jersey Fresh



Q.8a: Which of the following items have you seen sold as a Jersey Fresh/Jersey farm product in the stores where you shop?
Q.8b: Which of these items have you ever purchased?
Base: Primary Grocery Shoppers (823).

Non-produce items, such as milk, wines and fish are least likely to be associated with Jersey Fresh labeling.

Percentage Who Have Seen in Stores/Ever Purchased Items Sold as Jersey Fresh
(continued)



Q.8a: Which of the following items have you seen sold as a Jersey Fresh/Jersey farm product in the stores where you shop?
Q.8b: Which of these items have you ever purchased?
Base: Primary Grocery Shoppers (823).

Most specific Jersey Fresh crops also show a pattern of awareness and purchase that increases southwards through NJ.

Percentage Who Have Seen in Stores/Ever Purchased Items Sold as Jersey Fresh

~ By Geographic Region ~

		New Jersey					
	Total	Total (A)	North (B)	Central (C)	South (D)	Pennsyl-vania (E)	Staten Island (F)
Base: Primary Grocery Shoppers	(823)	(620)	(274)	(211)	(135)	(152)	(51)
	%	%	%	%	%	%	%
Have seen Jersey Fresh/Jersey farm *tomatoes*	63	66[F]	62	66	75[BC]	60[F]	39
Ever purchased	53	56[EF]	52	56	65[BC]	48	35
Have seen Jersey Fresh/Jersey farm *corn*	48	51[EF]	46	50	60[BC]	43[F]	26
Ever purchased	40	44[EF]	39	44	52[B]	33[F]	16
Have seen Jersey Fresh/Jersey farm *blueberries*	40	43[EF]	39	37	60[BC]	33[F]	20
Ever purchased	33	36[EF]	30	33	54[BC]	26[F]	12
Have seen Jersey Fresh/Jersey farm *peaches*	31	34[F]	26	34[B]	48[BC]	30[F]	8
Ever purchased	25	28[F]	22	28	41[BC]	22[F]	4
Have seen Jersey Fresh/Jersey farm *apples*	30	34[EF]	30	35	42[B]	18	18
Ever purchased	23	27[EF]	23	27	34[B]	11	10

Q.8a: Which of the following items have you seen sold as a Jersey Fresh/Jersey farm product in the stores where you shop?
Q.8b: Which of these items have you ever purchased?
(A/E/F)(B/C/D) = Significantly greater than indicated column at the 90% confidence level.

Southern NJ residents identify a greater variety of crops as Jersey Fresh than their northern or central counterparts, including strawberries, peppers, cucumbers and asparagus.

Percentage Who Have Seen in Stores/Ever Purchased Items Sold as Jersey Fresh

~ By Geographic Region ~
(continued)

		New Jersey					
	Total	Total (A)	North (B)	Central (C)	South (D)	Pennsyl-vania (E)	Staten Island (F)
Base: Primary Grocery Shoppers	(823)	(620)	(274)	(211)	(135)	(152)	(51)
	%	%	%	%	%	%	%
Have seen Jersey Fresh/Jersey farm *strawberries*	29	32[EF]	25	32[B]	47[BC]	24[F]	10
Ever purchased	22	25[EF]	18	24	41[BC]	16[F]	6
Have seen Jersey Fresh/Jersey farm *lettuce*	28	31[EF]	31	30	32	18	18
Ever purchased	20	23[EF]	23	22	24	11	8
Have seen Jersey Fresh/Jersey farm *peppers*	21	24[EF]	18	23	36[BC]	16[F]	8
Ever purchased	15	17[F]	12	18[B]	26[BC]	13[F]	4
Have seen Jersey Fresh/Jersey farm *cucumbers*	21	25[EF]	22	24	33[BC]	10	8
Ever purchased	16	20[EF]	19	18	24	7	6
Have seen Jersey Fresh/Jersey farm *asparagus*	16	18[EF]	12	15	35[BC]	13	6
Ever purchased	10	12[EF]	8	9	24[BC]	7[F]	-

Q.8a: Which of the following items have you seen sold as a Jersey Fresh/Jersey farm product in the stores where you shop?
Q.8b: Which of these items have you ever purchased?
(A/E/F)(B/C/D) = Significantly greater than indicated column at the 90% confidence level.

Percentage Who Have Seen in Stores/Ever Purchased Items Sold as Jersey Fresh

~ By Geographic Region ~

(continued)

		New Jersey					
	Total	Total (A)	North (B)	Central (C)	South (D)	Pennsyl-vania (E)	Staten Island (F)
Base: Primary Grocery Shoppers	(823)	(620)	(274)	(211)	(135)	(152)	(51)
	%	%	%	%	%	%	%
Have seen Jersey Fresh/Jersey farm *eggs*	14	16[E]	14	19	15	6	12
Ever purchased	9	11[E]	10	13[D]	7	2	8
Have seen Jersey Fresh/Jersey farm *herbs and greens*	13	14[E]	13	15	17	8	8
Ever purchased	8	9[E]	8	10	11	5	6
Have seen Jersey Fresh/Jersey farm *squash*	13	15[EF]	12	16	20[B]	6	2
Ever purchased	9	11[EF]	8	12	15[B]	3[F]	-
Have seen Jersey Fresh/Jersey farm *potatoes*	10	10[F]	9	11	11	11[F]	2
Ever purchased	7	7[F]	7	8	7	6	2
Have seen Jersey Fresh/Jersey farm *milk*	7	9[EF]	8	8	10	4	2
Ever purchased	4	6[EF]	4	6	7	1	-

Q.8a: Which of the following items have you seen sold as a Jersey Fresh/Jersey farm product in the stores where you shop?
Q.8b: Which of these items have you ever purchased?
(A/E/F)(B/C/D) = Significantly greater than indicated column at the 90% confidence level.

Percentage Who Have Seen in Stores/Ever Purchased Items Sold as Jersey Fresh

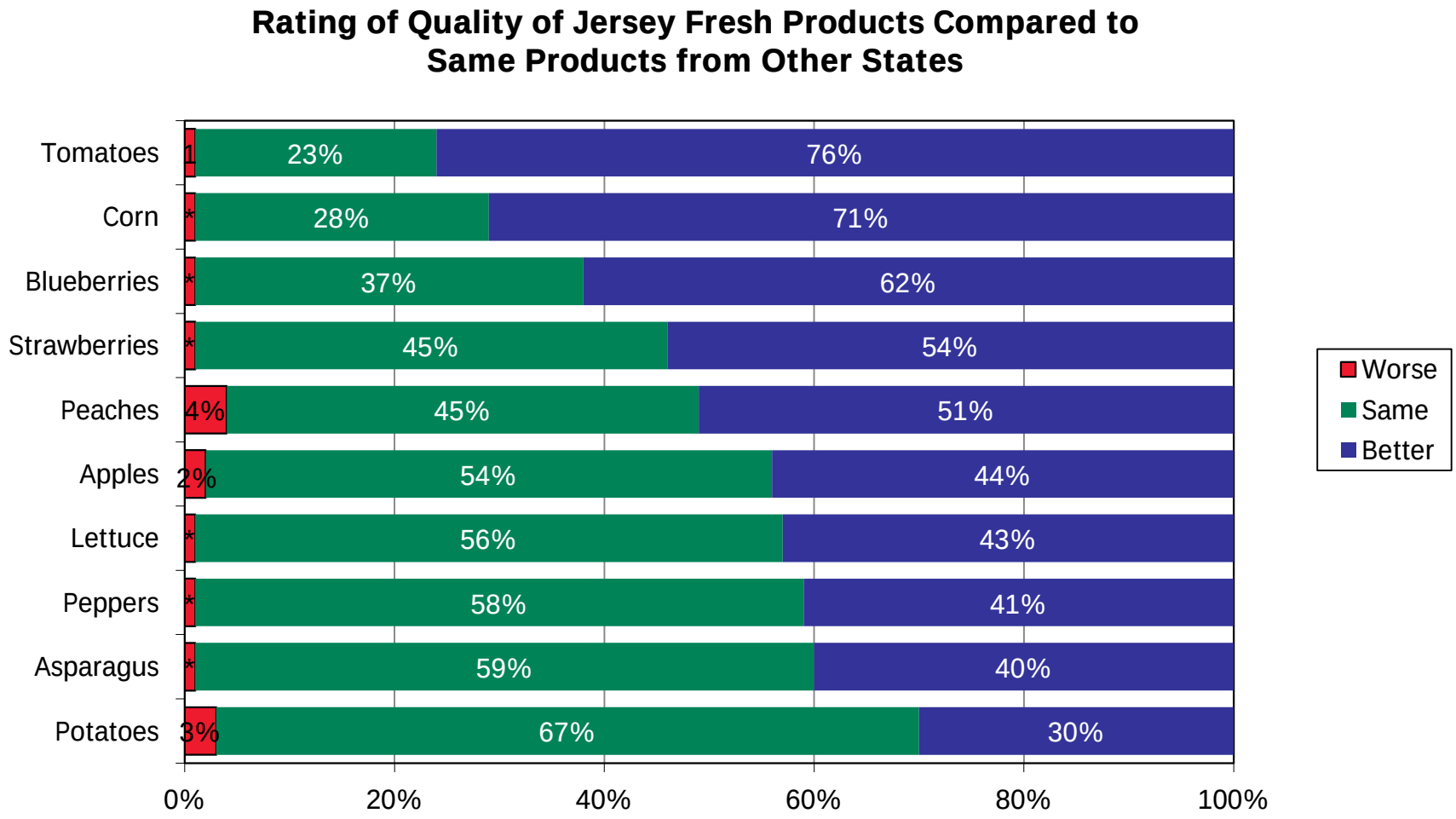
~ By Geographic Region ~

(continued)

		New Jersey					
	Total	Total (A)	North (B)	Central (C)	South (D)	Pennsyl-vania (E)	Staten Island (F)
Base: Primary Grocery Shoppers	(823)	(620)	(274)	(211)	(135)	(152)	(51)
	%	%	%	%	%	%	%
Have seen Jersey Fresh/Jersey farm *wines*	6	8[EF]	4	8	13[B]	3	2
Ever purchased	4	5[E]	2	5[B]	10[BC]	1	2
Have seen Jersey Fresh/Jersey farm *fish/seafood*	4	4[E]	3	5	6	1	2
Ever purchased	3	3[EF]	1	4[B]	6[B]	1	-

Q.8a: Which of the following items have you seen sold as a Jersey Fresh/Jersey farm product in the stores where you shop?
Q.8b: Which of these items have you ever purchased?
(A/E/F)(B/C/D) = Significantly greater than indicated column at the 90% confidence level.

The produce that are more readily identified as Jersey Fresh, such as tomatoes, corn and blueberries, are those that are more likely to be considered superior to those of other states.



Q.9: How would you rate the quality of the following Jersey Fresh/Jersey farm products compared to the same products from other states?
Base: Primary Grocery Shoppers (823).
*=1%.

Consumers obviously associate the Jersey Fresh labeling with freshness and being locally produced.

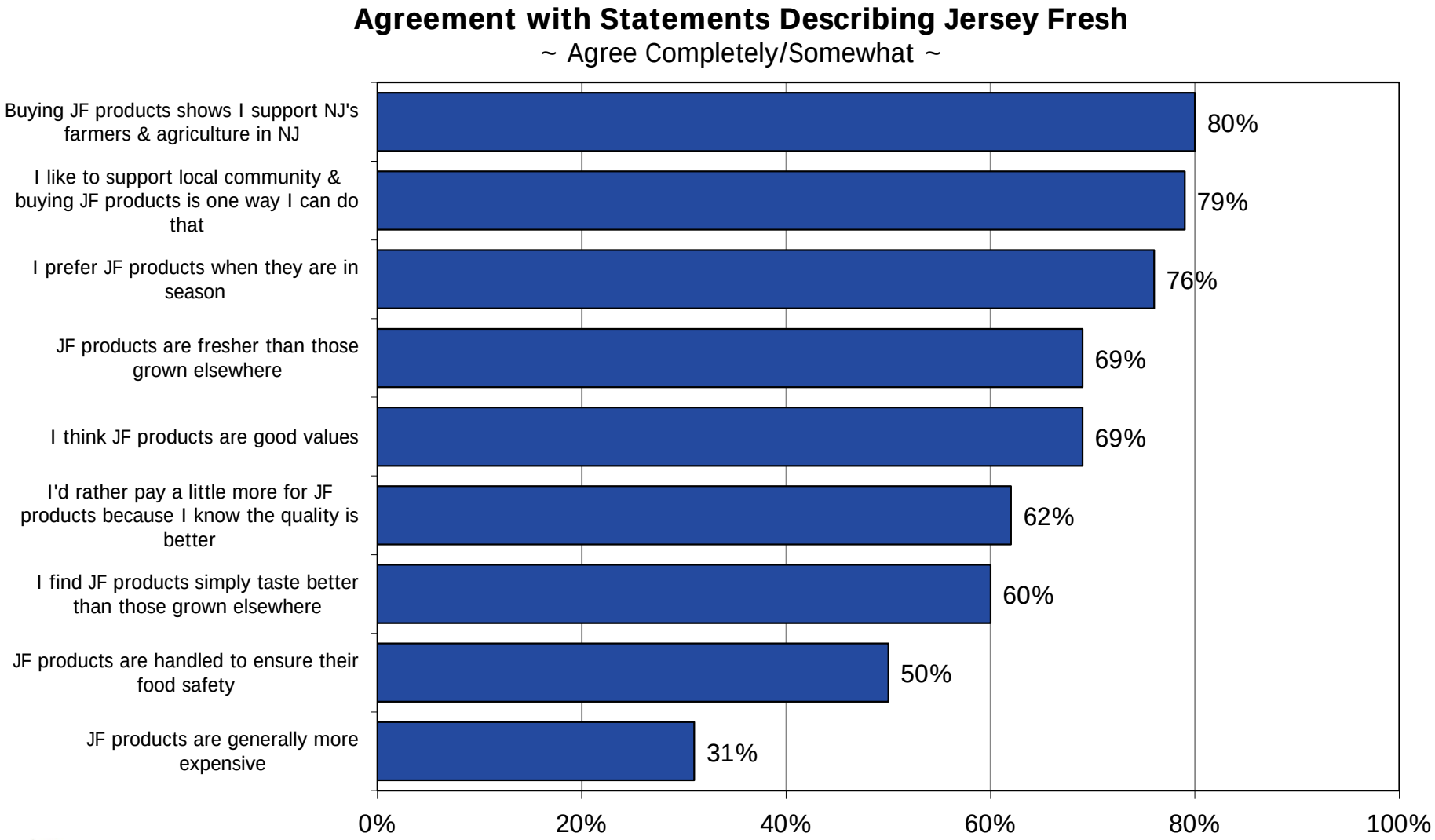
Volunteered Definition of *Jersey Fresh*

~ Major Mentions~

	Total
Base: Those who are aware of Jersey Fresh	(638)
	%
Fresh / Freshness (Net)	**41**
Fresh/freshness/fresh food	29
Fresh produce grown in New Jersey	7
Delivered to market soon after picking/harvest	6
Local / Homegrown (Net)	**40**
Locally grown produce/fruits/vegetables	29
Local/local farms	7
Supporting local farmers/growers	6
Grown in NJ/produce grown in New Jersey	31
Quality/reliable product/brand	13

Q.7c: What does Jersey Fresh mean to you?

Consumers view their purchase of Jersey Fresh produce as a way of supporting NJ agriculture and their local community. Most recognize that Jersey Fresh products are best when in season.



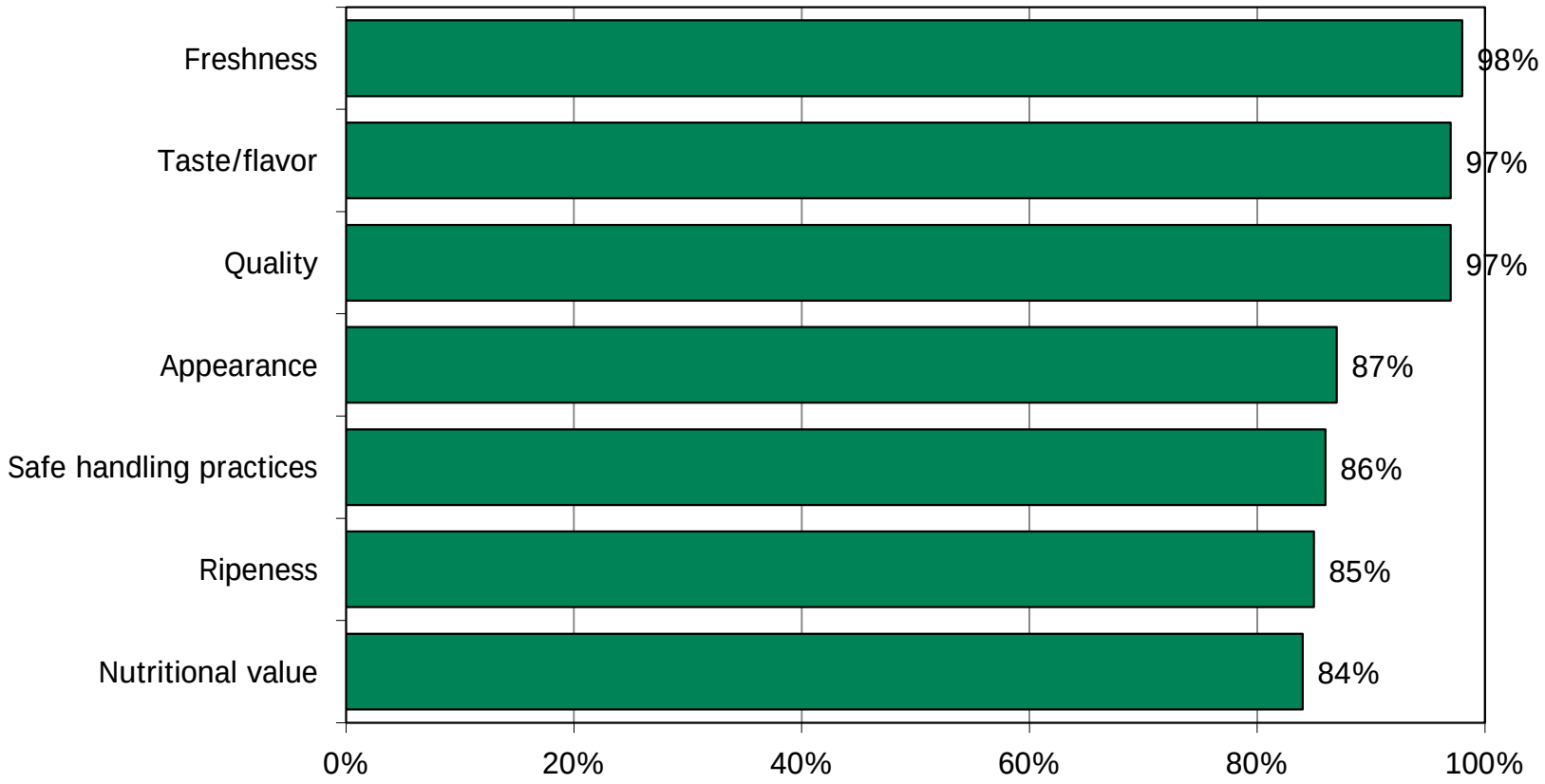
Q.10a: Please indicate how strongly you agree or disagree with each of the following statements about Jersey Fresh/Jersey farm.
Base: Primary Grocery Shoppers (823).

Wants & Needs

Produce freshness, taste and quality are factors critical to consumers. Appearance, safety, ripeness and nutritional value are differentiating factors.

Importance Ratings of Attributes When Purchasing Fresh Fruits and Vegetables

~ Extremely/Very Important ~



Q.6a: For each of the attributes listed below, please rate how important that attribute is to you when selecting fresh fruits and vegetables.

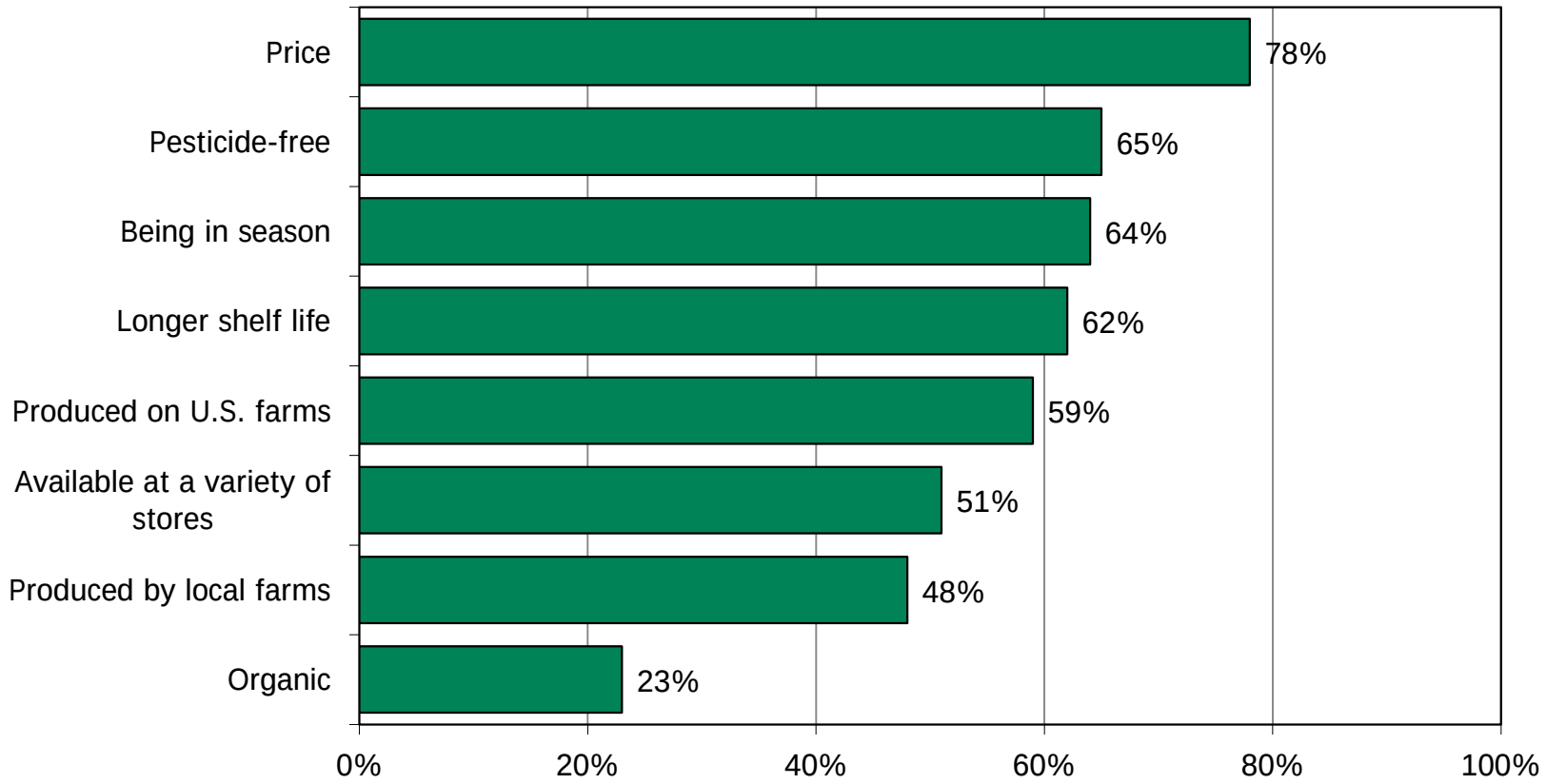
Base: Primary Grocery Shoppers (823).

Availability, being produced locally and organically are currently lesser factors when purchasing produce.

Importance Ratings of Attributes When Purchasing Fresh Fruits and Vegetables

~ Extremely/Very Important ~

(continued)



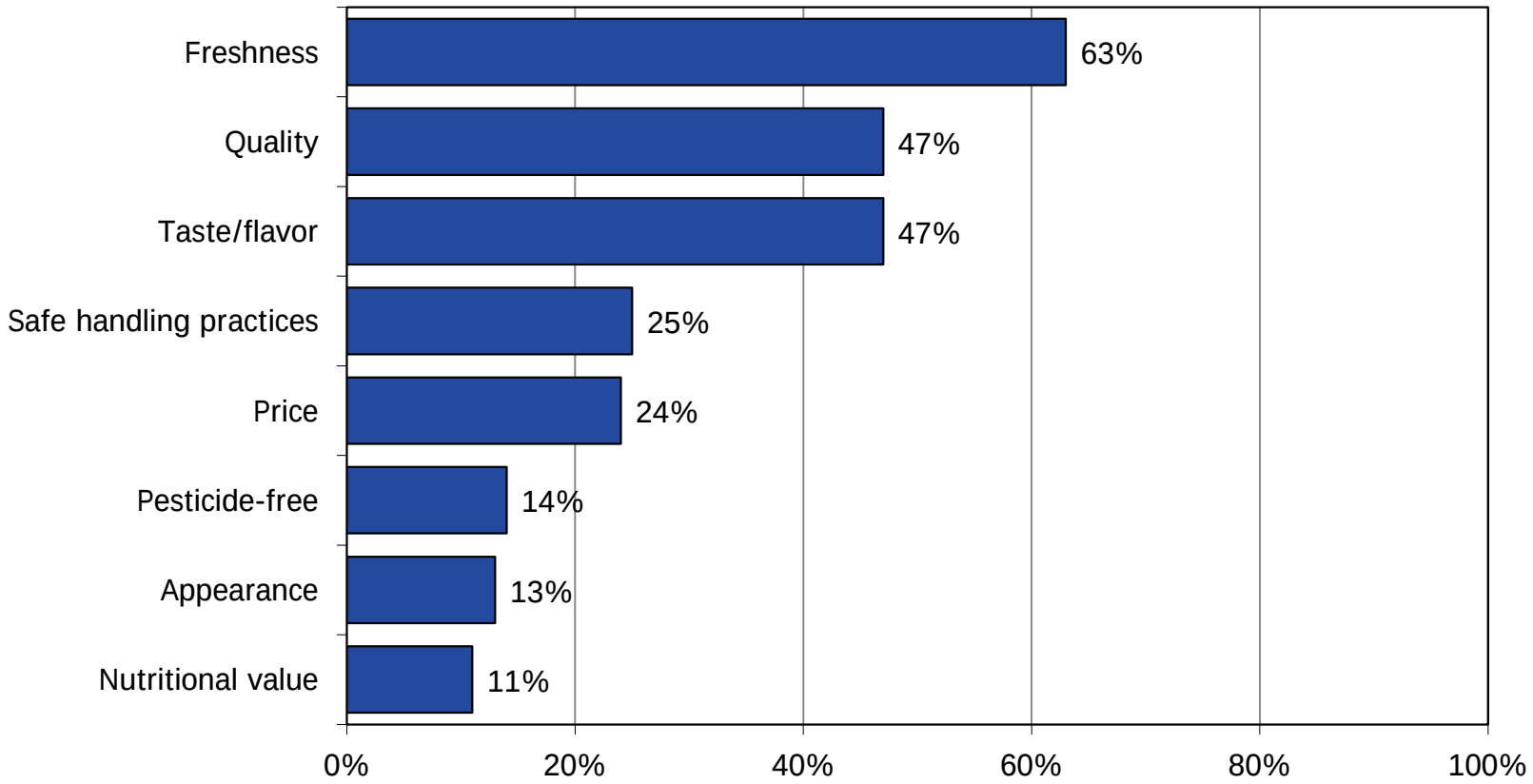
Q.6a: For each of the attributes listed below, please rate how important that attribute is to you when selecting fresh fruits and vegetables.

Base: Primary Grocery Shoppers (823).

When ranked in order of importance, freshness, quality and flavor again place above other factors. This holds true across the geographic locations.

Ranking of Importance of Factors When Purchasing Fresh Fruit/Vegetables

~ Ranked 1st, 2nd or 3rd ~



Q.6b1: These are the attributes you felt were extremely important. Place a "1" next to the one that is most important to you and a "2" next to the second most important attribute.

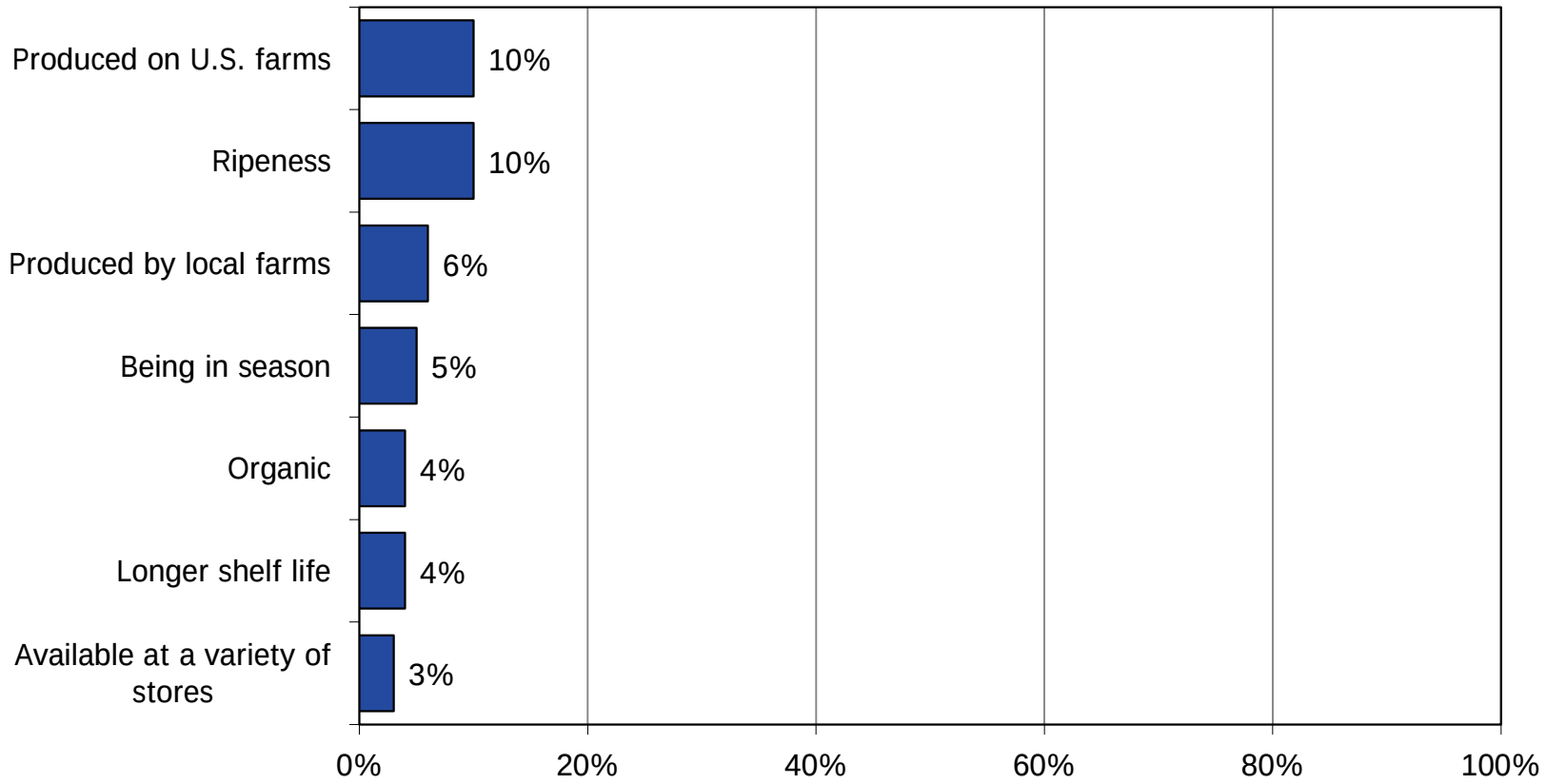
Q.6b2: These are the attributes you felt were extremely important. Place a "1" next to the one that is most important to you, a "2" next to the second most and a "3" next to the third most important attribute.

Base: Rated at Least One Factor "Extremely Important" (734).

Ranking of Importance of Factors When Purchasing Fresh Fruit / Vegetables

~ Ranked 1st, 2nd or 3rd ~

(continued)



Q.6b1: These are the attributes you felt were extremely important. Place a "1" next to the one that is most important to you and a "2" next to the second most important attribute.

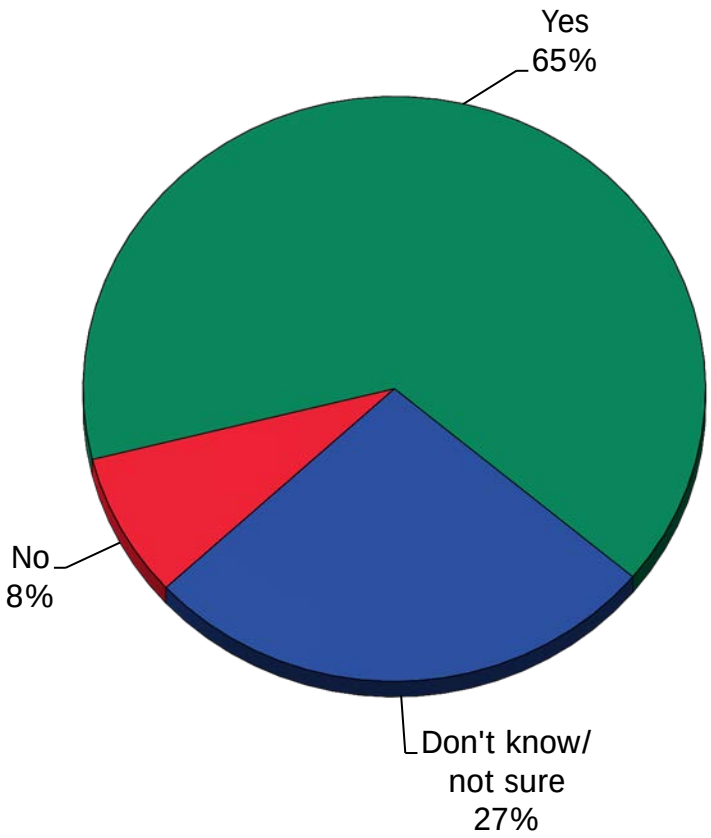
Q.6b2: These are the attributes you felt were extremely important. Place a "1" next to the one that is most important to you, a "2" next to the second most and a "3" next to the third most important attribute.

Base: Rated at Least One Factor "Extremely Important" (734).

Ad Awareness & Promotion

The majority of consumers indicate that their main food store does identify produce as Jersey Fresh. A sizeable proportion are unsure.

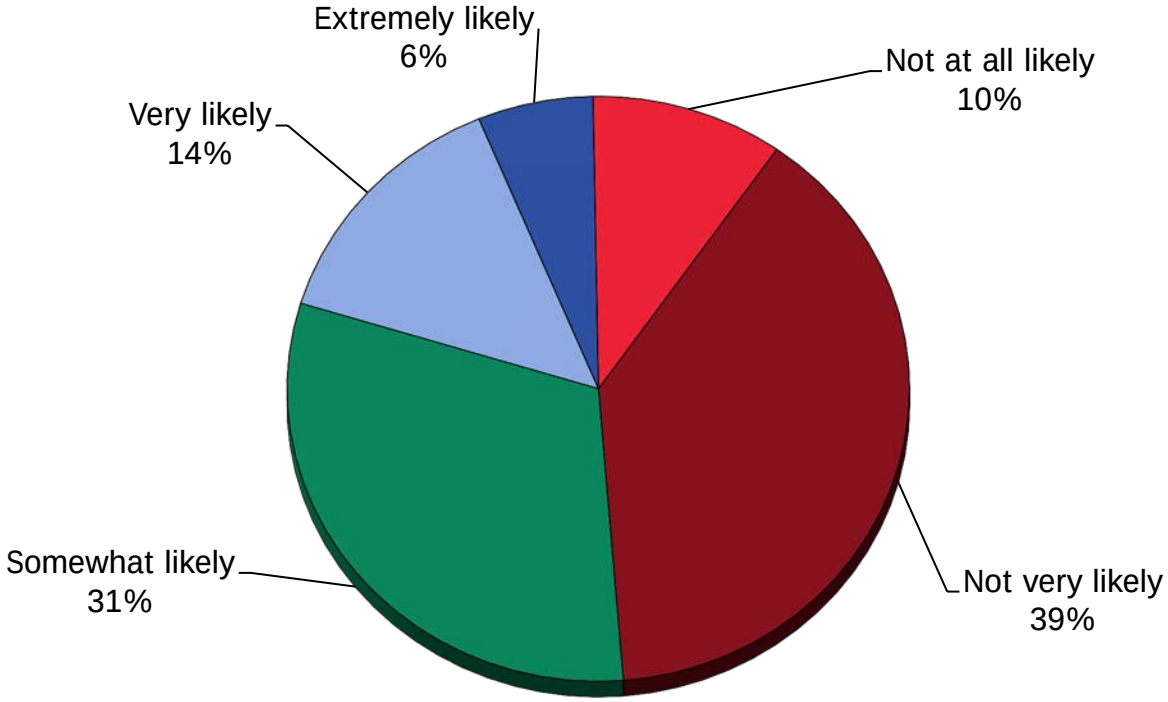
Whether Store Where Majority of Food Purchased Identifies Products as "Jersey Fresh"



Q.11: Does the store where you purchase the majority of the food for your household identify any products as "Jersey Fresh"?
Base: Those Aware of Jersey Fresh (638).

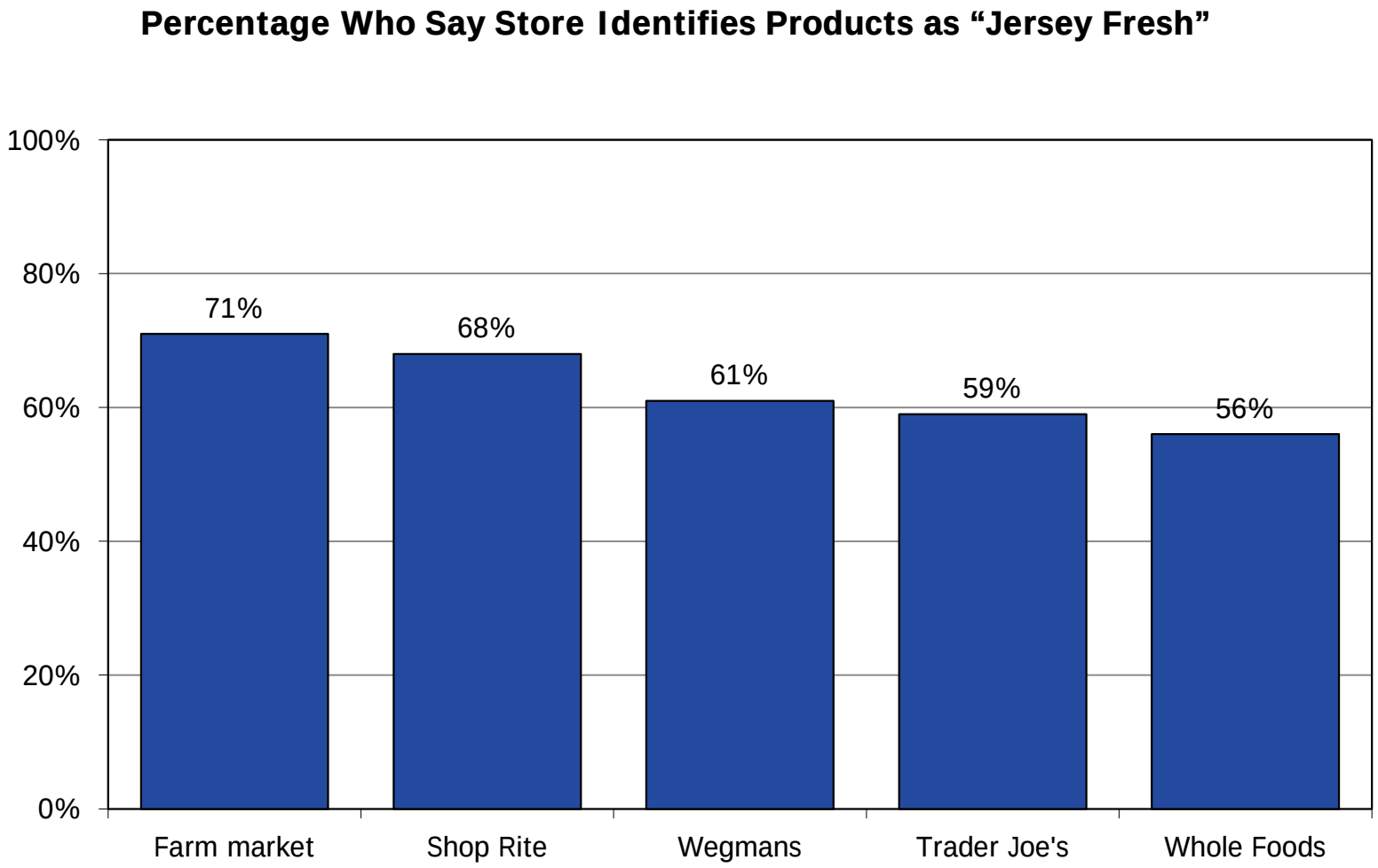
Perhaps with so many already seeing “Jersey Fresh” identified in their store, just 2 in 10 are extremely/very likely to request Jersey Fresh products if they are not seen in the store.

Likelihood of Requesting Jersey Fresh Produce if Not Seen in Store



Q.10c: If you did not see Jersey Fresh/Jersey farm products where you shop for food, how likely would you be to ask for them?
Base: Primary Grocery Shoppers (823).

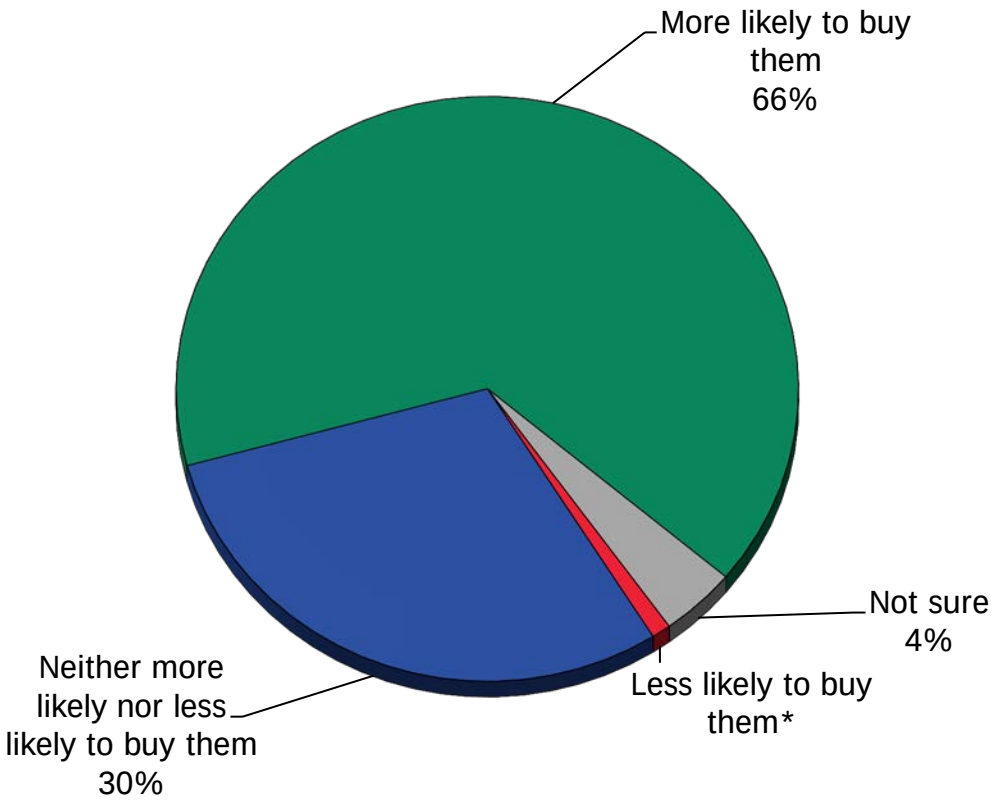
Farm market and Shop-Rite shoppers report the highest in-store recall of Jersey Fresh.



Q.11: Does the store where you purchase the majority of the food for your household identify any products as "Jersey Fresh"?
Base: Those Aware of Jersey Fresh (Farm market=309, Shop Rite=460, Wegmans=103, Trader Joe's=106, Whole Foods=77).

Two out of three consumers are more likely to purchase produce bearing a Jersey Fresh label.

Influence of "Jersey Fresh" Identification on Likelihood of Purchase

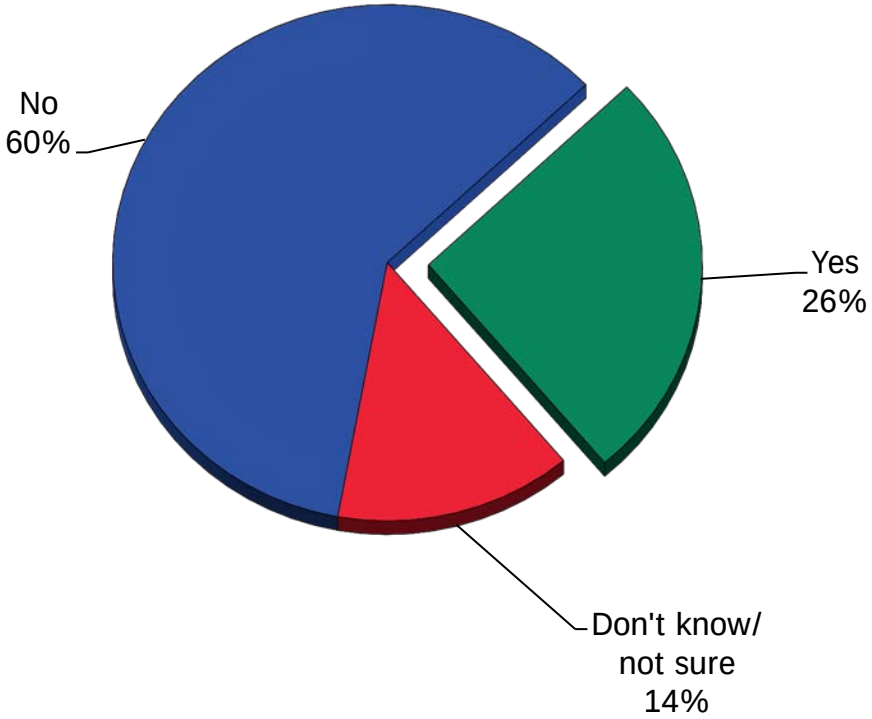


Q.10b: If the growers or food stores identified Jersey Fresh/Jersey farm fruits and vegetables, are you...?
Base: Primary Grocery Shoppers (823).
*Less than 0.5%.

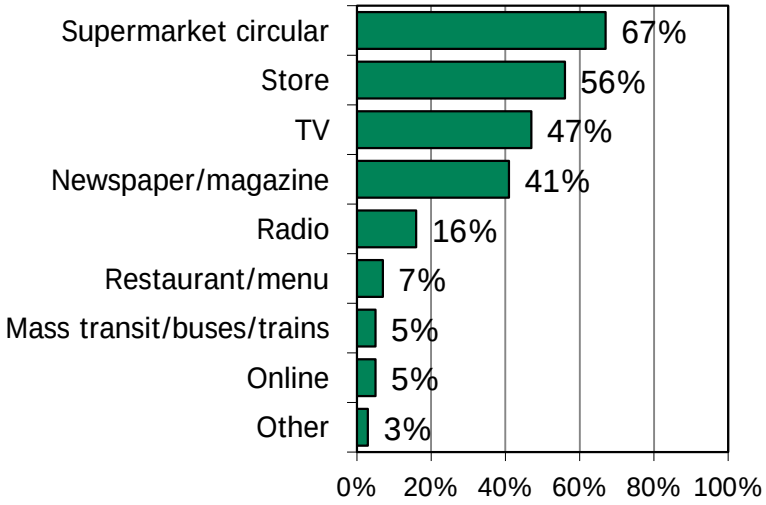
Despite the fact that there have currently been no ads or promotions, 26% of consumers report having seen them in the past 6 months – predominantly in circulars or in stores.

Summary of Recall of News/Advertising/Promotions for Jersey Fresh in Past 6 Months

Whether News/Advertising/Promotions Were Seen/Heard



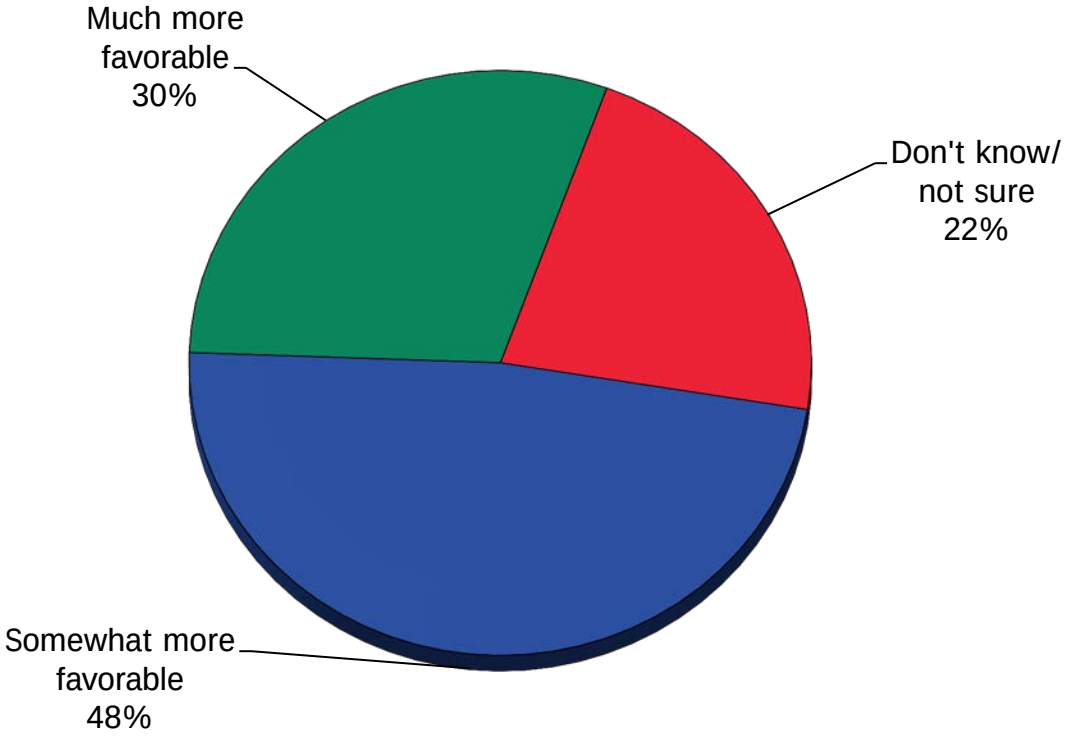
Where News/Advertising/Promotions Were Seen/Heard



Q.12a: Do you recall seeing or hearing any news, advertising or promotions for Jersey Fresh in the past 6 months?
Q.12b: Where did you see or hear any news, advertising or promotions for Jersey Fresh?
Base (pie chart): Primary Grocery Shoppers (823).
Base (bar chart): Recall Seeing/Hearing News, Advertising or Promotions for Jersey Fresh in Past Six Months (211).

Restaurants could benefit by labeling menu ingredients as "Jersey Fresh," as customers gain a more favorable opinion of their establishment.

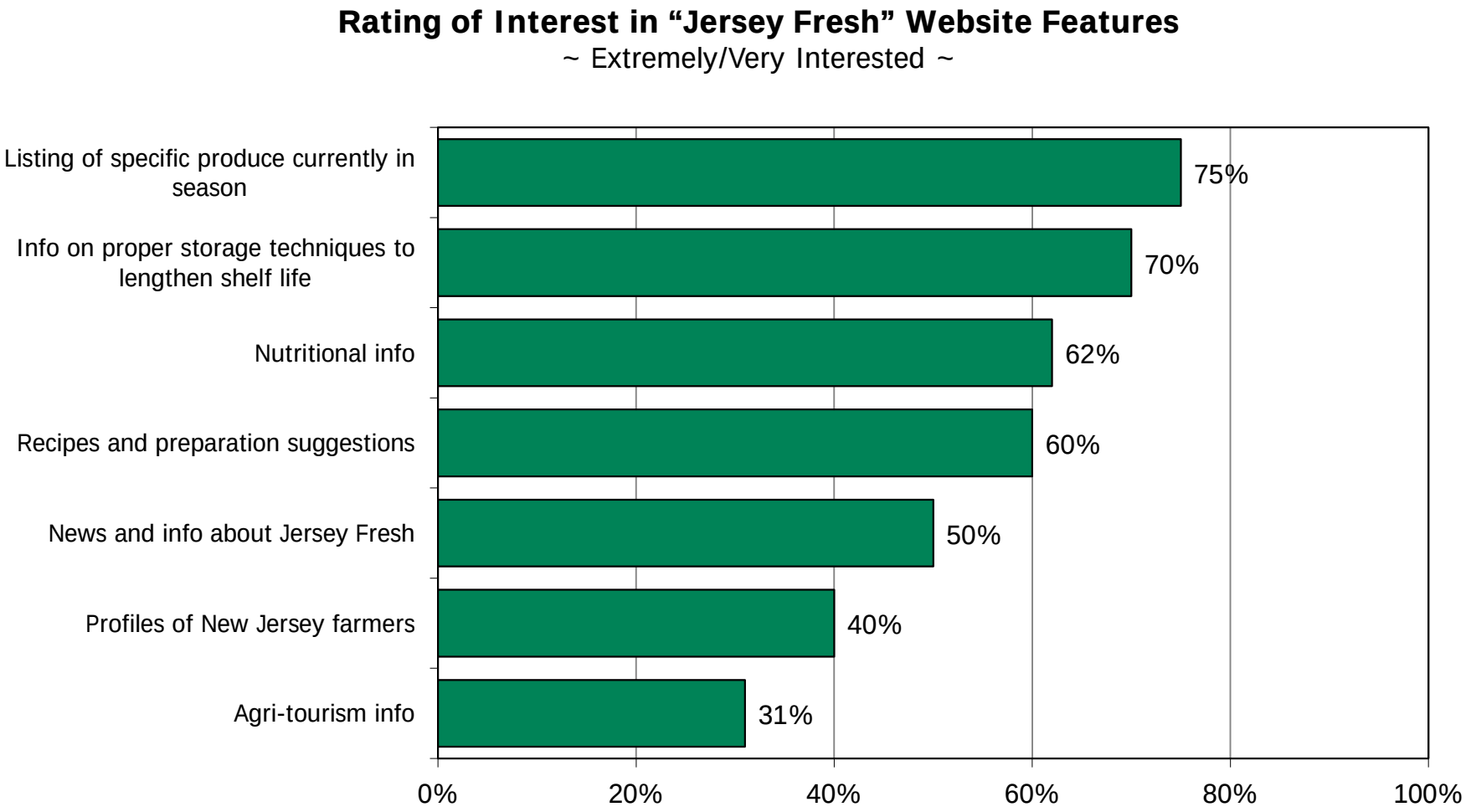
Impact of "Jersey Fresh" Label on Menu on Opinion of Restaurant



Q.12c: If you were dining out in a restaurant and saw a menu item or items labeled "Jersey Fresh", how would that impact your opinion of the restaurant? Would your overall opinion of the restaurant be...?
Base: Recall Seeing/Hearing News, Advertising or Promotions for "Jersey Fresh" in Past Six Months (211).
Note: "Somewhat less favorable" and "Much less favorable" = 0%.

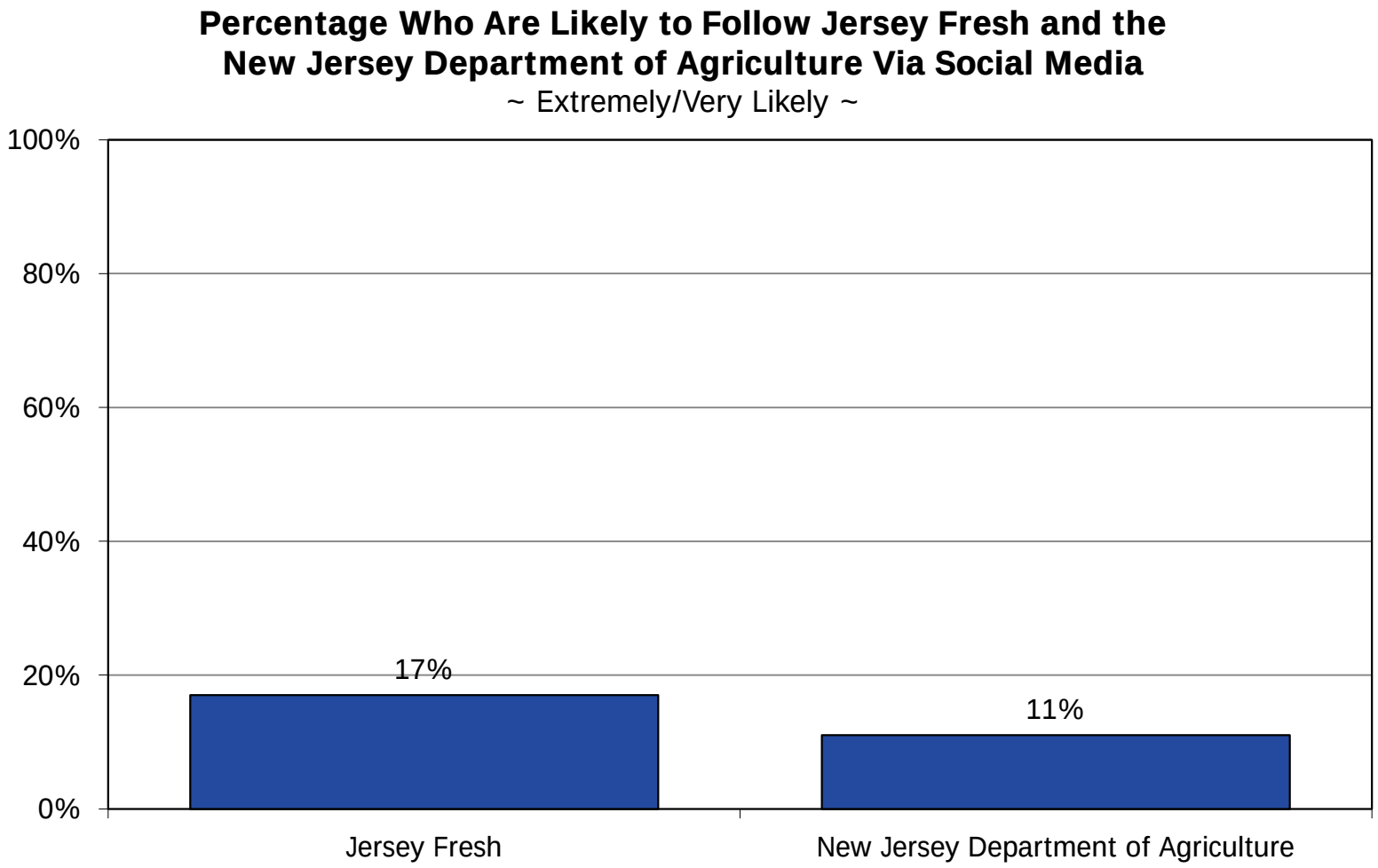
Interest in Social Media

Site contents that hold the widest interest are listings of in-season produce and tips about proper storage. Nutritional information and recipes hold moderate levels of interest.



Q.13a: Jersey Fresh is planning to enhance their website next year. How interested would you be in each of the following if they were included on that website?
Base: Those Aware of Jersey Fresh (638).

Almost 2 in 10 shoppers say they are likely to follow Jersey Fresh via social media, and about half of that proportion are likely to follow NJDA.



Q.13b: How likely would you be to follow Jersey Fresh via social media like Facebook or Twitter?
Q.13c: How likely would you be to follow the New Jersey Department of Agriculture via social media like Facebook or Twitter?
Base: Those Aware of Jersey Fresh (638).

Shopping Behavior

A large proportion of consumers have some degree of concern about the food supply – what is contained in their produce, where their food comes from and the use of preservatives. Seven in ten feel they are knowledgeable about nutritional value and prefer locally-produced food.

Agreement With Statements About Shopping for Food

~ Agree Completely/Somewhat ~

	Total
Base: Primary Grocery Shoppers	(823)
	%
I'm very concerned about what is contained in the fresh fruits and vegetables I buy for myself and my family	73
I'm concerned about where my food comes from	72
I am knowledgeable about the nutritional value of the foods I eat	71
I'm concerned about the preservatives in the foods I eat	71
I try to buy foods that are locally produced, near where I live	68
I am willing to pay more for locally grown food items	61
I focus mainly on health and nutrition when I eat	58
I am into new foods and food experiences	58
I have changed my diet because of health concerns	54
I think that organic and natural products are not worth the extra cost	51
I consider myself a "foodie", it's a passion of mine	42
I shop at stores that carry a lot of natural and organic foods	39
I consider myself knowledgeable about sustainable agriculture	33
I buy natural and organic foods as much as I can	33

Q.15: Please indicate how strongly you agree or disagree with each of the following statements.

Supermarkets are just about universally shopped.

Stores/Locations Where Food Was Purchased in Past Six Months

		New Jersey					
	Total	Total (A)	North (B)	Central (C)	South (D)	Pennsyl-vania (E)	Staten Island (F)
Base: Primary Grocery Shoppers	(823)	(620)	(274)	(211)	(135)	(152)	(51)
	%	%	%	%	%	%	%
Supermarkets	95	95	96	94	94	93	98
Club stores	60	58	54	65[BD]	55	62	73[A]
Mass merchants	50	50[F]	42	51[B]	62[BC]	55[F]	33
Farm markets	44	45[F]	42	49	44	47[F]	26
Natural food stores	42	40	52[CD]	33	25	52[A]	45
Restaurants	37	37	41[C]	32	38	36	31
Convenience stores	36	34	34	30	41[C]	43[A]	33
Delicatessens	30	27	30	24	27	34	45[A]
Small boutique or specialty grocery stores	18	17	22[CD]	15[D]	8	26[AF]	14
Other store/location	2	2[F]	1[D]	3[D]	-	3[F]	-

Q.1a2: In which of the following stores and locations have you purchased any type of food for your household in the past six months or so?

(A/E/F)(B/C/D) = Significantly greater than indicated column at the 90% confidence level.

The vast majority of consumers purchase most of their food in supermarkets.

Store/Location Where *Majority* of Food Was Purchased in Past Six Months

		New Jersey					
	Total	Total (A)	North (B)	Central (C)	South (D)	Pennsyl-vania (E)	Staten Island (F)
Base: Primary Grocery Shoppers	(823)	(620)	(274)	(211)	(135)	(152)	(51)
	%	%	%	%	%	%	%
Supermarkets	80	81	80	78	84	76	78
Club stores	8	8	7	12[BD]	4	6	14
Mass merchants	5	4	3	3	9[BC]	9[AF]	2
Natural food stores	5	5	7[D]	4	2	6	4
Small boutique or specialty grocery stores	1	1	*	1[D]	-	1	2
Farm markets	1	1[F]	1	1	-	1	-
Delicatessens	1	1[EF]	*	1	2	-	-
Restaurants	*	*	-	1	-	-	-
Other store/location	1	1[F]	1	1	-	1	-

Q.1b: In which <u>one</u> type of store or location do you purchase the majority of the food for your household?
(A/E/F)(B/C/D) = Significantly greater than indicated column at the 90% confidence level.
*Less than 0.5%.

With the exception of Pennsylvania, Shop-Rite was the most widely shopped supermarket. In Pennsylvania, over half shop at Giant. In Staten Island, Pathmark and Stop & Shop are also popular.

Supermarket Usually Shopped

		New Jersey					
	Total	Total (A)	North (B)	Central (C)	South (D)	Pennsyl-vania (E)	Staten Island (F)
Base: Those Who Have Shopped for Food in Supermarkets in Past 6 Months	(780)	(588)	(263)	(198)	(127)	(142)	(50)
	%	%	%	%	%	%	%
Shop-Rite	73	82[EF]	80	80	88[BC]	40	62[E]
Stop & Shop	21	24[E]	31[D]	30[D]	-	1	46[AE]
Trader Joe's	18	16	24[CD]	11	9	25[A]	18
Pathmark	15	12	14	12	9	16	50[AE]
Wegmans	15	14	3	23[B]	24[B]	22[AF]	12
ACME	15	12[F]	2	11[B]	36[BC]	32[AF]	-
A&P	15	19[EF]	32[CD]	15[D]	-	-	4
Whole Foods	12	12[F]	15[D]	11[D]	6	18[AF]	-
Giant	11	1[F]	1	1	1	56[AF]	-
Foodtown	4	5[E]	7[D]	5[D]	2	-	2
Kings	3	4[EF]	7[CD]	2[D]	-	1	-
Other supermarket	7	5	8[C]	2	5	18[AF]	2

Q.1c: At which of the following supermarkets do you usually shop?
(A/E/F)(B/C/D) = Significantly greater than indicated column at the 90% confidence level.

Supermarket Shopped Most Often

		New Jersey					
	Total	Total (A)	North (B)	Central (C)	South (D)	Pennsyl-vania (E)	Staten Island (F)
Base: Those Who Have Shopped for Food in Supermarkets in Past 6 Months	(780)	(588)	(263)	(198)	(127)	(142)	(50)
	%	%	%	%	%	%	%
Shop-Rite	55	64[EF]	62	63	70[B]	23	38[E]
Stop & Shop	9	9[E]	10[D]	13[D]	-	-	28[AE]
Giant	7	*	*	-	-	40[AF]	-
Wegmans	6	5	*	9[B]	9[B]	8[F]	2
ACME	5	4[F]	-	4[B]	14[BC]	11[AF]	-
A&P	5	6[E]	10[CD]	4[D]	-	-	4
Pathmark	4	3	3	3	3	3	22[AE]
Trader Joe's	2	2	3[D]	2	1	4	2
Whole Foods	1	1[F]	2[D]	1	-	2[F]	-
Foodtown	1	2[E]	2	2	1	-	2
Kings	1	1[EF]	3[CD]	-	-	-	-
Other supermarket	4	3	5[CD]	1	2	10[AF]	2

Q.1d: Which one do you shop at most often?
(A/E/F)(B/C/D) = Significantly greater than indicated column at the 90% confidence level.
*Less than 0.5%.

Television and Internet are the most widely used sources of news. While half receive information from the newspaper, only 2 in 10 cite it as their main source.

Sources Used for News and Current Information

	Total	
	Use Regularly	Main Source
Base: Primary Grocery Shoppers	(823)	(823)
	%	%
Television	82	41
Internet	75	33
Local newspapers	54	19
Radio	44	6
Magazines	26	1
Other sources	2	1

Q.14a: Which of the following sources do you regularly use for news and current information?
Q.14b: Which source do you consider your main source of news and current information?

Demographic Information

Demographic Information

	Total	New Jersey				Pennsyl-vania (E)	Staten Island (F)
		Total (A)	North (B)	Central (C)	South (D)		
Base: Primary Grocery Shoppers	(823)	(620)	(274)	(211)	(135)	(152)	(51)
	%	%	%	%	%	%	%
Grow Own Vegetables							
Yes	28	28	23	31[B]	33[B]	27	28
No	72	72	77[CD]	69	67	73	73
Marital Status							
Married	62	63	62	61	66	59	63
Single	19	17	17	16	20	27[AF]	16
Widowed/divorced/separated	13	14[B]	16[D]	14	9	9	18
Living with someone	6	6	5	9[BD]	4	5	4
Ethnicity							
White/Caucasian	87	87	83	89[B]	90[B]	90	82
Asian/Pacific Islander	5	6	7[D]	6[D]	2	4	8
Black/African-American	4	3	4	2	4	4	4
Latino/Hispanic	3	3[F]	4	2	2	2[F]	-
Native American/Alaskan native	*	*	*	-	1	-	-
Other	1	1	1	1	2	-	4

Q.24: Do you grow your own vegetables?
Q.25: Are you...?
Q.29: We need to gather the opinions of people with various racial backgrounds. Do you consider yourself to be...?
(A/E/F)(B/C/D) = Significantly greater than indicated column at the 90% confidence level.
*Less than 0.5%.

Demographic Information
(continued)

	Total
Base: Primary Grocery Shoppers	(823)
	%
Employment Status	
Employed	66
Full-time	54
Part-time	12
Not employed	32
Have Children 18 Years or Younger Living in Home	
Yes	22
No	78
Education Level	
Less than high school	*
High school graduate	11
College incomplete/vocational/technical	19
College graduate	42
Postgraduate/advanced college degree	28

Q.25: Are you employed outside your home?
Q.26a: Do you have any children aged 18 or younger living at home?
Q.27: What is the last grade of school you completed?
*Less than 0.5%.

Demographic Information
(continued)

	Total
Base: Primary Grocery Shoppers	(823)
	%
Age	
20-39	32
40-59	40
60+	28
Median age	52
Gender	
Male	32
Female	68
Income	
$40,000 - $74,999	33
$75,000 - $124,999	42
$125,000 +	25
Median	93M

Q.C: What is your age?
Q.A: Are you...?
Q.D: What is the yearly income of your household, before taxes?