

Why Buy Local?

Research findings on food shopping and priorities for buying local in Western North Carolina

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Recommended citation for this publication:

Local Food Research Center, ASAP. Why Buy Local? Asheville, NC. 2025

ASAP Local Food Research Center
October 2025

This survey was conducted as part of a three-year research project called "Connections in Direct Markets: Assessing the feedback loop between consumer values and farmers' marketing strategies." This research is supported in part by the National Institute of Food and Agriculture, U.S. Department of Agriculture, under award number 2022-38640-37488 through the Southern Sustainable Agriculture Research and Education program under subaward number LS23-382.

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Executive Summary

Over the past 20 years, Appalachian Sustainable Agriculture Project (ASAP) has worked in Western North Carolina (WNC) to build a thriving local food economy with an intent of strengthening farm businesses, supporting the health of the population, and building thriving communities. This new report continues to add to the knowledge of the region on consumer food shopping perspectives. The most recent survey was fielded online from April to October 2024 among local adults and yielded 553 responses with 72 percent of participants having lived in WNC for more than 5 years.

Key highlights include:

- 86 percent of consumers surveyed shop for food at least once a week with most (87%) using traditional grocery stores and over half (55%) visiting farmers markets
- 87 percent of respondents shop for local food once a month or more frequently, henceforth called a "local food shopper" with the remaining 13 percent shopping for local food less than monthly, called in this report a "typical shopper."
    - Local food shoppers more often reported shopping at farmers markets, farm stores/farm stands, and CSA shares while typical shoppers reported more shopping at limited assortment grocery stores and dollar/convenience stores.
- Primary drivers behind food purchasing decisions varied for non-local food products and local food product shopping.
    - Among all shoppers (including both those with higher and lower incomes), price, health, and convenience were the top three priorities when buying non-local food.
    - Connecting with and supporting farmers and farm workers, health, and taste were customers' top three priorities when buying local food.
    - Few participants reported concerns with food safety or food preparation.
- Top priorities for local food shopping did not appear to be affected by household income.
    - Participants with a household income below $75,000 reported top local food priorities to be supporting farmers and farm workers (50%), health (47%), taste (44%), and knowing where and how my food is grown/transparency (40%).
    - Similarly, those with an annual household income at or above $75,000 reported local-food priorities to be supporting farmers and farm workers (53%), taste (47%), health (43%), and supporting farm businesses/economy (42%).
- The top three barriers to purchasing more local food were similar among consumers:
    - the market/store hours or locations can be inconvenient,
    - shoppers are unable to purchase all of their groceries in one place, and
    - local food is considered expensive.
- Other factors that would allow customers to buy more local food included better labeling and education on where to buy locally
- 87 percent of local food shoppers and 74 percent of typical customers expressed a strong desire to buy more local food for their household.

Though there are barriers that may currently limit customers' desired local food purchasing, the results of this survey paint a hopeful picture in WNC.

Regional Perspective

Located in the Southern Appalachian Mountains, WNC is a region comprising the 23 westernmost counties in North Carolina. This area also includes the Qualla Boundary, home of the Eastern Band of Cherokee Indians (EBCI) that extends through five WNC counties. Historically, the region was largely dependent upon the cultivation of burley tobacco. Legislative changes in the late 1990s and early 2000s virtually eliminated government subsidies for burley tobacco farms, causing a sharp decline in the profitability of such operations.

In 1995, seeing the challenges faced by small producers in the region, a group of farmers, agriculture support/service professionals, and other community stakeholders came together to create community-based solutions. This initiative resulted in the launch of a local food campaign in 2000, and ASAP formally became a nonprofit in 2002. For almost two and a half decades, ASAP has worked to increase consumer awareness and education around the value of local food and farms, build capacity of farms as viable businesses, and make connections across the food system. Currently, nearly 700 farms in WNC are part of ASAP's Appalachian Grown network. The region has both urban centers and rural areas with the highest number of direct to consumer market outlets in the state. Those outlets include a diverse set of retail venues for food shopping, such as farmers markets, farm stands, community supported agriculture (CSA), and online platforms, as well as other types of wholesale retail including grocery stores, big box stores (also called discount stores), warehouse clubs, limited assortment grocery stores, dollar formats, and convenience stores.

ASAP included consumer preference surveys in its formative years and formed its Local Food Research Center (LFRC) in 2012 with the goal of assessing the economic, social, and environmental impacts of localizing food systems and identifying strategies that can bring about positive food system change. The LFRC has published numerous reports on the local food system, including findings from 2015–2019 related to motivations to engage with local farms and food. The population of Buncombe County, North Carolina grew 14.6 percent between 2010 and 2022, from 238,743 to 273,589[1]. To further provide timely information as the region expanded in population, ASAP was awarded a three-year research grant from the USDA's Southern Agriculture Research and Education (SARE) program (2023–2026). As part of the grant objectives, ASAP will examine and improve the feedback loop between values driving consumer demand for local food in WNC and how farmers communicate their offerings. This survey assessed shopping behaviors and considerations for purchasing non-local and local food as well as challenges to purchasing more local food.

[1]https://usafacts.org/data/topics/people-society/population-and-demographics/our-changing-population/state/north-carolina/county/buncombe-county/

Methodology

The online consumer survey, "How do you shop for food?" was fielded using Survey Monkey from April 24 to October 10, 2024. The survey was promoted on ASAP's social media and shared digitally through email, newsletters, farmers, and regional partners. A QR code was included in ASAP's 2024–2025 *Local Food Guide* and on paper fliers distributed at community venues such as public libraries and laundromats in and around the Central and Smoky Mountain areas. Respondents also had the option to complete a paper survey or call ASAP to complete the survey over the phone.

Residents of the 23 westernmost North Carolina counties and the Qualla Boundary aged 18 and older were eligible to participate. The survey received a total of 553 valid responses. Though the survey and promotional materials were available in both English and Spanish, all responses collected were in English; and all but one survey were completed online.

Survey Sample: Consumer Demographics

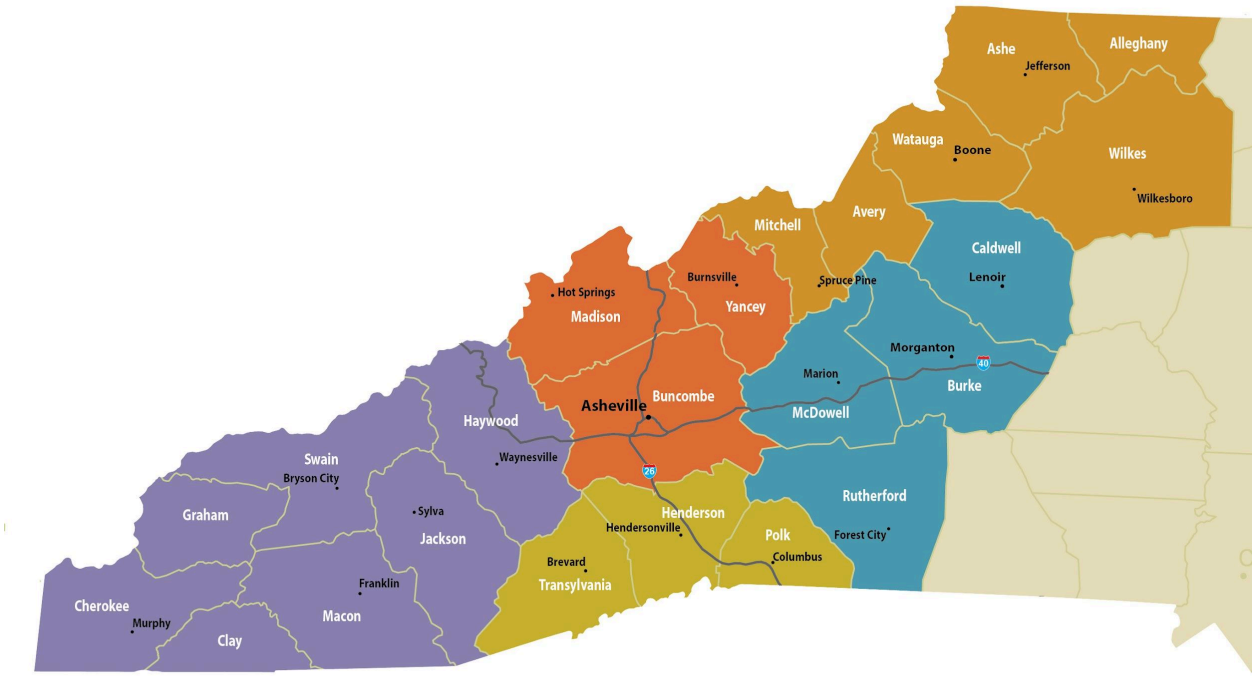
Among the 553 participants, 87 percent of participants are "primary shoppers," meaning they are responsible for the majority of the food shopping for their households. Approximately 88 percent are women and 12 percent are men. This high proportion of women participants is fairly similar to time use surveys that find the majority (80%) of household food shopping is done by women in the U.S.[2] Eleven percent of survey respondents identify as LGBTQIA+. The sample is predominantly White (93%). Less than one percent identify as Black or African-American, Asian, Native American/Alaska Native, or Native Hawaiian/other Pacific Islander, respectively. Approximately 2 percent identify as two or more races. Hispanic/Latino respondents made up 2 percent of the sample. According to the 2020 American Community Survey[3], Western North Carolina was 89.3% White, 4.2% Black or African American, 1.4% American Indian/Alaskan Native and 6.3% Hispanic or Latino (of any race). Thus, the current survey has under-representation among non-White citizens of WNC.

Nearly half (48 percent) of respondents reside in the Central Mountain area, consisting of Buncombe, Madison, and Yancey Counties; 43 percent of responses came from Buncombe County alone. Residents of the Smoky Mountain area (Cherokee, Clay, Graham, Haywood, Jackson, Macon, and Swain Counties) made up a third of responses. The sample was somewhat representative of Western North Carolina, with a few exceptions. Despite making up 43 percent of respondents, Buncombe County residents account for only 23 percent of the WNC population. Participants from Clay County represented 10 percent of the sample but only make up one percent of the population in the region. Alleghany and Avery Counties were not represented, nor was the Qualla Boundary. There was considerable variation in the length of residency in WNC among survey respondents.

[2] https://www.bls.gov/tus/home.htm
[3] https://www.wnchn.org/wnc-data/about-wnc-2022/

More than half are long-time residents, having lived in the region for more than 10 years, while 28 percent have only lived in the region for five years or fewer.

Figure 1. Map of Western North Carolina (WNC)



Compared to WNC as a whole, survey respondents skewed older. While 40 percent of the region's residents are 55 years or older, 58 percent of the sample fell into this age range. This stemmed primarily from respondents aged 65 to 74 years; they make up 14 percent of the general population but accounted for 30 percent of survey responses. Meanwhile, those in the 18 to 24 year age group were notably underrepresented, making up only two percent of consumers in the sample but nine percent of the region as a whole.

The sample of survey respondents had slightly higher levels of attained education than WNC residents. Approximately three-quarters of survey participants had earned a four year (Bachelor's) college degree or higher, whereas 27 percent of the general WNC population has achieved the same. Participants reported higher annual incomes than the average WNC household. The income range reported by the most survey respondents was $50,000 to $74,999 per year; this compares to the 2023 American Consumer Survey range most reported by WNC residents being $25,000 to $49,999[4]. Nearly half (45%) of the households in the region earn less than $50,000 every year while the same is only true for 23 percent of the sample. To address this difference in our sample per the primary research question is focused on purchasing food, we conducted a secondary analysis of local food shoppers stratified by household income.

[4]https://data.census.gov/table/ACSST5Y2023.S1901?t=Income+(Households,+Families,+Individuals)&g=050XX00US37005,37009,37011,37021,37027,37035,37039,37043,37075,37087,37089,37099,37111,37113,37115,37121,37149,37161,37173,37175,37189,37193,37199&moe=false

Figure 2. Household Income Among Survey Respondents and Western North Carolina



Findings

General Shopping Habits

For most shoppers, buying groceries is a frequent occurrence. **Eighty-six percent of customers shop for food at least once a week**; about half do so more often. Only about 4 percent of consumers reported purchasing food less frequently than once every two weeks. When shopping for local food products, there was more variation. While the majority of participants shop once a week or more, others only buy local food biweekly, monthly, or a few times per year.

Those who purchase local food on a regular basis (monthly or more frequently) were categorized in this report as "**local food shoppers**" (n= 451; 87%). The remaining 69 respondents (13%) were categorized as "**typical food shoppers**," though some may purchase local food occasionally over the year.

Compared to typical food shoppers, local food shoppers...

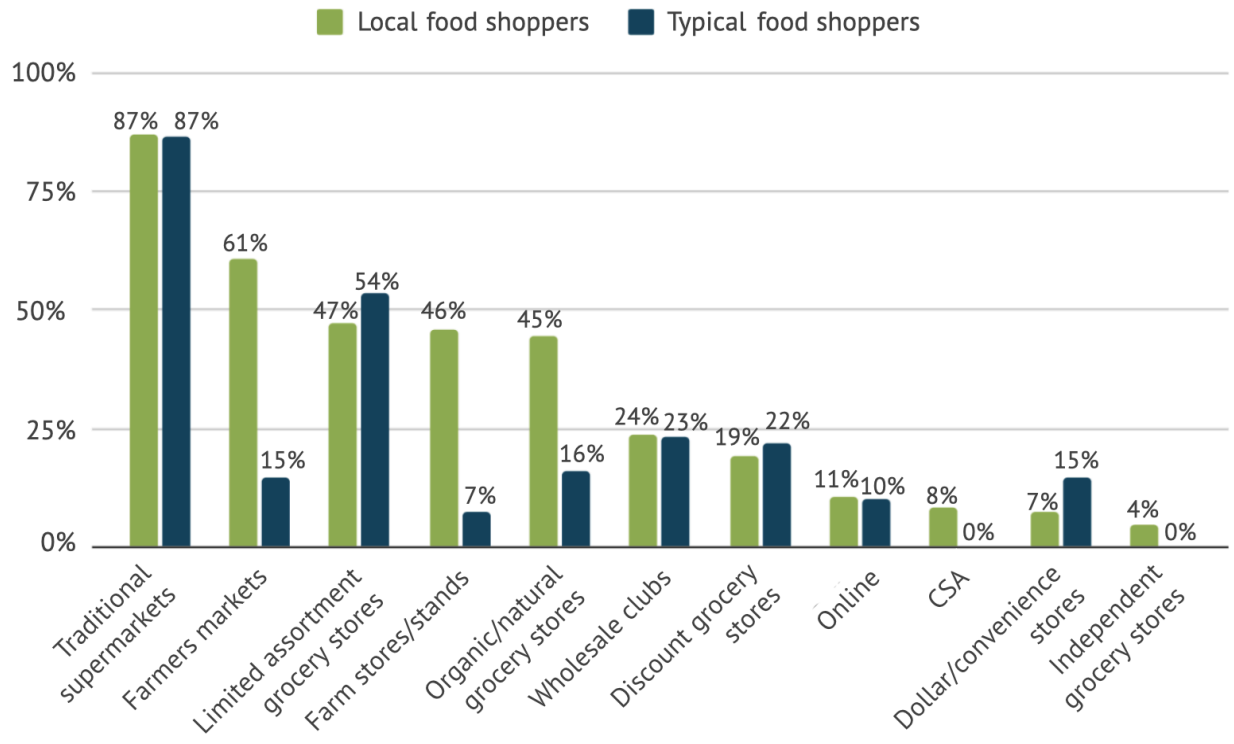
- **have a smaller average household size (2 people vs. 3)**
- **are slightly more formally educated (74% hold 4-year degree or higher vs. 68%)**
- **food shop more than once a week (50% vs. 21%)**

Half of all local food shoppers reported food shopping more than once a week. However, just over half of all typical shoppers are buying groceries once per week, and just under a quarter (22 percent) only do so once every two weeks.

Nearly all consumers (87%) do at least some of their grocery shopping at traditional supermarkets such as Ingles, Food Lion, or Harris Teeter. Just over half (55%) shop at farmers markets and 48 percent shop at limited assortment grocery stores such as Aldi or Trader Joe's. Roughly one in five shoppers typically purchases from discount grocery stores. These percentages, however, do not paint a complete picture of the robust local food system in WNC.

Though the vast majority of both local and typical shoppers purchase food from traditional grocery stores, differences emerge between other shopping locations. Local food shoppers reported more often obtaining food at farmers markets, at farm stores/stands, and/or through CSA shares. Compared to 61 percent of local food consumers who purchase from farmers markets, only 15 percent of typical shoppers reported the same. Nearly half (46%) of local shoppers reported purchasing food at farm stores and/or stands while the same is true of only seven percent of typical customers. Instead, these typical shoppers reported higher rates of shopping at limited assortment grocery stores and dollar or convenience stores.

Figure 3. Self-Reported Food Shopping Locations (Local Food Shoppers and Typical Food Shoppers)



Survey respondents self-reported an average monthly grocery bill of $549.28. Local food shoppers reported spending $560.48 per month and typical food shoppers reported $479.00 per month. This

compares to the U.S. household food at home average in 2023 of $504.42 from the Consumer Expenditure Survey[5].

Table 1. Average Monthly Grocery Bill Reported by Household Size

Household Size	All Respondents
1 person	$320.14
2 people	$521.65
3 people	$624.57
4+ people	$848.09
Overall average	$549.28

Food Shopping: Priorities and Barriers

Why do customers purchase the food they do? Participants were asked to select, in no particular order, their top three considerations when purchasing groceries for their household.

Non-Local Grocery Shopping Priorities

Price was the primary driver behind non-local food shopping decisions for all shoppers; shown below in Figure 4, 70 percent of all respondents (across income levels) named it as a top consideration for non-local (67% local food shoppers vs. 91% typical). Approximately half of all respondents prioritized convenience (45% local vs. 63% typical) and/or the health of their household (48% local vs. 39% typical). The flavor or taste of the food they plan to purchase was an important factor in the purchasing decisions of approximately four of every 10 shoppers (42% local vs. 45% typical).

Local Food Shopper Considerations

Assessment among those deemed Local Food Shoppers finds that **more than half of local food shoppers named connecting with and supporting farmers and farm workers as a motivating factor when purchasing local food** (displayed in Figure 4 as "people" (54%)), health (46%), and taste (45%) were the top three considerations.

Price of local food was only a primary driver of shopping decisions among 32 percent of local food shoppers. Fewer customers named convenience as a priority when shopping for local food; only 16 percent of local food shoppers prioritized local food being convenient or easy to access. Many respondents provided comments on the impact of their purchasing decisions on the local economy, and named a desire to support farm businesses as a primary motivator.

[5] https://www.bls.gov/opub/reports/consumer-expenditures/2023/

Figure 4. Priorities When Purchasing Non-local Food (Among All Respondents)

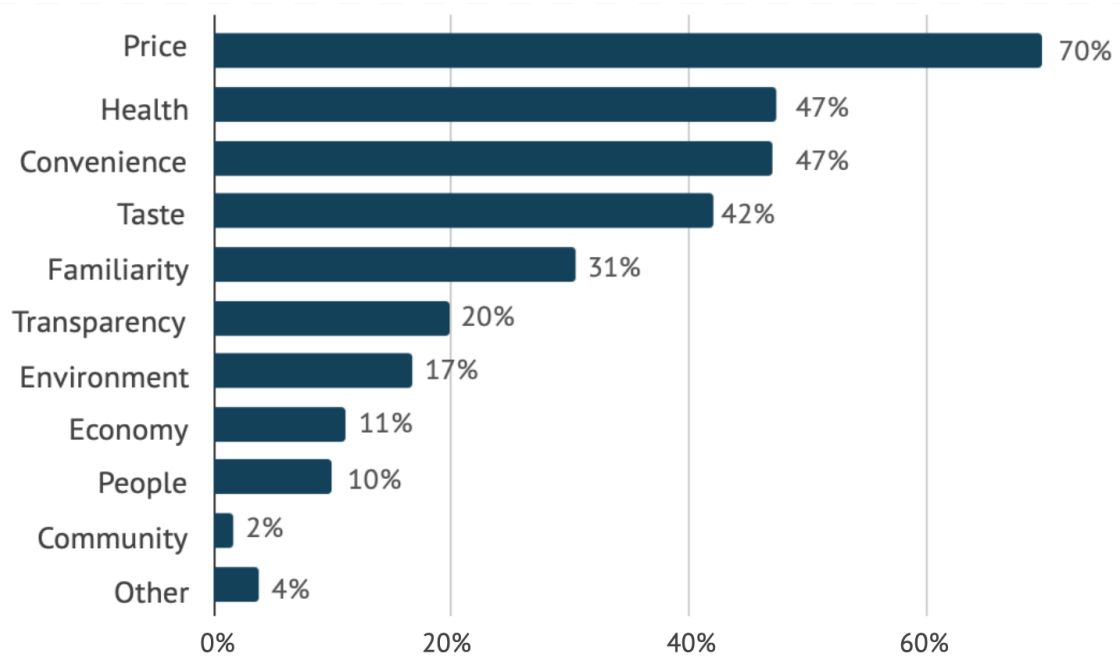
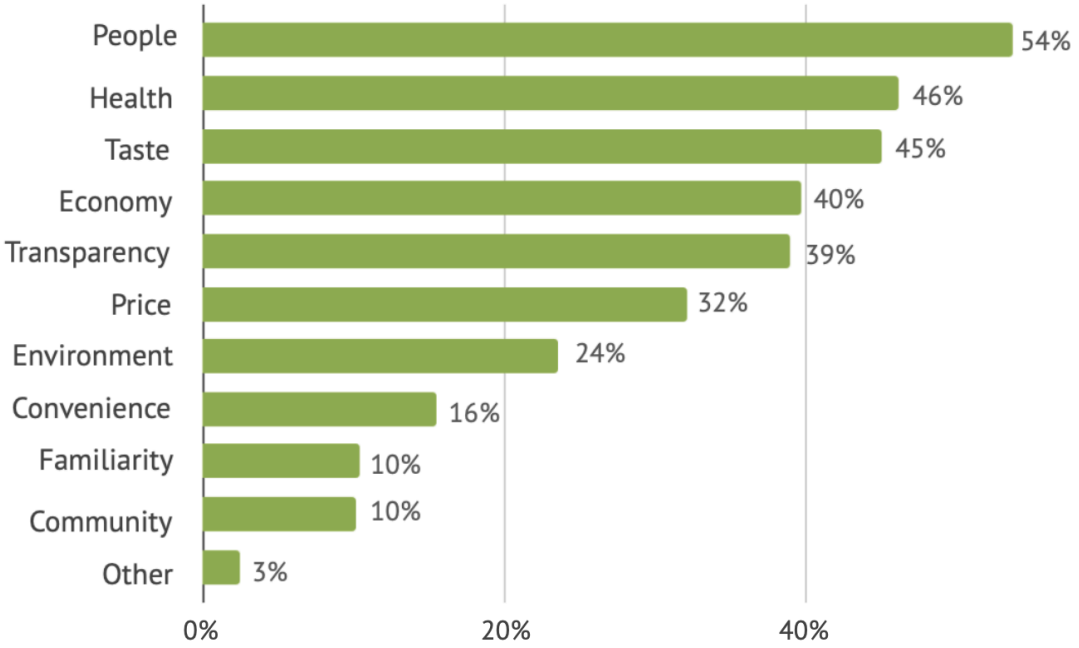


Figure 5. Priorities When Purchasing Local Food (Among Local Shoppers)



We completed a secondary analysis of local food shoppers by household income due to our sample having higher incomes than regional population data as a whole. From this analysis, we found that clients' annual income was not a primary driver when responding to priorities for non-local food shopping. Those with an annual household income below $75,000 reported top non-local food priorities to be price (73%), health (42%), and convenience (47%). Similarly, those with household income at or above $75,000 reported price (63%), health (52%), and convenience (49%). Priorities

for local food shopping were also very similar across income levels, with slight variation for production transparency and supporting local farm economy. Participants with a household income below $75,000 reported top local food priorities to be supporting farmers/people (50%), health (47%), taste (44%), and knowing where and how my food is grown/transparency (40%). Those with an annual household income at or above $75,000 reported local food priorities to be supporting farmers/people (53%), taste (47%), health (43%), and supporting local farm economy (42%).

Respondents were also given the opportunity to explain, in their own words, why they buy local food. Similar to responses to the previous question, just over half cited a desire to support WNC farmers and their farm businesses. One praised local producers, writing:

"*We have many amazing farmers in our area and as long as they are farming, I'm buying from them! Farmers need our support. They work so very hard for such a small return at times*."

Another explained:

"Doing my part to ensure local farms continue to exist is important to me. It's a quality I want my kids to see acted out, [not] just spoken about as we drive by farms…"

Approximately 40 percent of customers named the freshness and quality of local food as a motivating factor behind their purchasing decisions. Many observed that the closer food is grown, the less time and distance are needed to transport it to a store or market, which allows consumers to access fresher produce. One respondent wrote:

"*Produce [grown] locally and purchased fresh is always of higher quality. Additionally, there are varieties available in farmers markets that don't ship well so are rarely seen elsewhere*."

Another participant succinctly explained:

"*We try to buy local when we can to get the freshest food in season and support the community.*"

However, for many consumers, their decision to shop local was influenced by many different factors. Nearly 70 percent of respondents named more than one reason why they purchase local food, some of which are illustrated in the quotes below:

"Buying local food feels like "voting" for what I care deeply about: farmers, the environment, health, delicious food!"

"I really enjoy the feeling of being more connected to my food and where it comes from. I want to support small farmers so we as a society don't become dependent on commercial/industrial agriculture. If we can keep these small farms in business that's a good thing. ***It also makes me feel alive actually, that feeling of being connected to my food****…compared to buying from the grocery store and not knowing where or how it was grown, when it was harvested, etc. I also only buy local food from producers who don't use pesticides/etc. and so I know I'm eating food that is much less toxic. I also know it's more nutritious because it was just picked, versus being picked who knows when."*

"Our food supply chain is much more fragile than most of us realize. We need to encourage regional food sufficiency, and buying local is a practical way to do that. Shopping at my local farmers' market (North Asheville Tailgate) helps me supplement the food I grow myself and helps to build a healthy community."

"It makes me feel good on levels of body, mind and soul. Seriously. The food's way often better - fresher, in season and so on. I love looking the farmer in the eye and thanking him/her..."

"A few reasons: chiefly, I label myself as somewhat of a food enthusiast and hobby chef, and I love cooking with local ingredients, seasonally. Secondly, because I can afford the time and costs to support local food economies and ***I think it's my duty to support people who are good stewards of the land I love"***

While many customers are prioritizing supporting local, based on self-reported spending, just under three-quarters of local shoppers are spending 25 percent or less of their monthly grocery budget on local food. Assuming the average local food shopper household spends $560.48 on groceries, more than two-thirds of customers are spending at most $140 per month on local food. However, the majority of respondents want to purchase more; **87 percent of local shoppers and 74 percent of typical consumers expressed that they want to buy more local food**.

TIP FOR FARMERS:

One in four local food shoppers spends more than ¼ of their monthly food budgets on local food. Invest more into marketing strategies that encourage existing customers to purchase more local food.

In a survey 20 years earlier, 2004, 27 percent of residents surveyed by ASAP reported spending more than 10 percent of their monthly expenditures on locally grown food. In this recent study, we found that 71 percent reported spending more than 10 percent of their monthly shopping budget on local food. This percentage was higher among local food shoppers (76%); in our survey, among typical food shoppers, approximately 32 percent reported spending more than 10 percent of their monthly food budget on local food.

Challenges and Facilitators to Local Food Purchasing

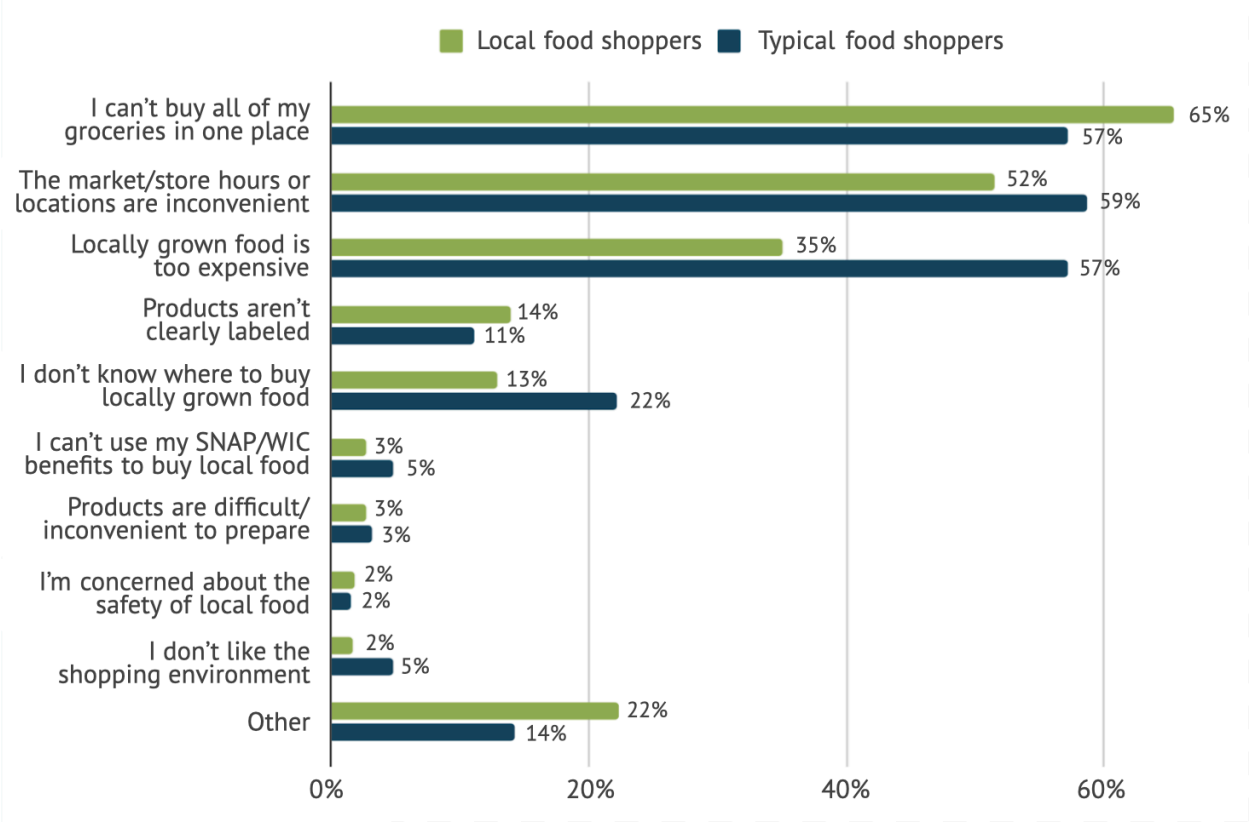
Among all shoppers, the three biggest challenges to purchasing more local food were similar (seen below in Figure 6). For half of the shoppers, not being able to buy all their groceries in one location and the hours or locations of their local markets and stores are inconvenient. Distance to the nearest shopping center can be prohibitive, especially in more rural areas. One participant shared:

"*No fault of the local growers, between working full-time and where the local food is, it is about 20 miles out of my way.*"

Other customers simply have busy schedules that may not align with the days or hours when nearby farmers markets are open. When asked what would allow them to buy more local food, another proposed:

"[If it was] closer to where I live. Most of the time it's impossible to get where these places are located before they close if I have to wait until I get off of work."

Figure 6. Barriers to Purchasing Local Food by Shopper Type



The inability to purchase all of their groceries in one place was reported as a challenge by customers' ability to increase buying local food for their household for both groups. "*I don't like having to go to multiple stores,*" one respondent explained. "*I try to do all of my shopping in one place for convenience, time, and gas money.*"

Availability of locally grown labeled products in the store where they normally shop was named by numerous customers as a potential motivator for allocating more of their budget to local food. One customer expressed that having this option available would drastically increase how often they buy locally grown food, stating: "*The best case scenario would be grocery stores partnering with local farmers to get their products into those stores. I would be much more likely to choose local food if I had both options in front of me at a grocery store.*"

Cost and limited food budget were also reported as a top challenges, named by over half of typical food shoppers (57%) and approximately a third of local food shoppers (35%). "*If I had more money, or if food was cheaper,*" one consumer wrote, explaining what would allow their household to purchase more local food. "*It's a simple matter of my budget. I have five people to feed.*" Another respondent echoed the sentiment, stating: "*Cost is a big deciding factor. I'd love to buy more local but I can't always afford to.*"

Additional factors that were reported by more than 10 percent of shoppers as challenges included that products aren't clearly labeled (i.e., prices, names of products, growing practices used), and "I don't know where to buy locally grown food". The need for greater labeling and transparency echoes what was found in prior consumer research (see: asapconnections.org/downloads/growing-local-analysis-section.pdf). Specifically, the 2004 study concluded that 82 percent of respondents indicated they would buy more locally produced food if it were labeled as local.

TIP FOR FARM AND RETAIL BUSINESSES:

Consider including labels/prices for your produce. If customers have questions about prices, take that as an opportunity to tell them about the farm, production practices, and some of the inputs that go into your farm that require you to set those prices.

TIP FOR FARMERS AND SUPPORT AGENCIES:

Invest in consumer education materials which tell customers how, where, and when to buy local.

TIP FOR EVERYONE:

Support incentive programs like Double SNAP and Produce Prescription to provide customers with lower-incomes access and affordability of local food including healthy fruits and vegetables.

When asked what would allow them to purchase more local food for their households, shoppers offered a variety of ideas. For example, there are still changes that can be made on an individual level that promote local food purchasing. Having prices clearly displayed would encourage some to buy more local food, including one respondent who wrote, "*I would love to see prices being displayed on things be normalized at the farmers markets. Often it is, but it's kind of embarrassing to have to ask and then have to decline to buy the thing if it's too much.*" For certain products, especially when in season, the price of locally grown food can be comparable to that of grocery store products. One participant suggested that farmers or markets "*provide a price comparison locator to compare prices and drive consumers to locally grown food.*"

Others wish that information about the farms they buy from was more easily accessible at the market. "*...having obvious signage of growing practices or scan a QR code with information about that farm would be super helpful,*" stated one consumer.

Local Food Information Sources

When customers were asked how they prefer to receive information about local food, the top three responses were social media (59%), emailed newsletters (52%), and online searchable databases (43%). This preference towards digital was shared by both local and typical shoppers, and existed regardless of age. More than half of all survey respondents are between the ages of 55 and 74. A limitation in interpreting this question on source is that primary dissemination of this survey was digital and all but one respondent completed the survey as an online questionnaire despite the hard copy and phone options being available. Thus, our respondents may not have barriers around internet access or technology use compared to the general population.

Discussion and Implications

Our survey of WNC households found that among the local food shoppers 61 percent utilized farmers markets, 46 percent shop at farm stands/stores, and 8 percent purchase CSAs. Supporting farmers and farm workers, health, and taste were the top three priorities when buying local food.

Though there are barriers that may currently limit customers' local food purchasing, the results of this survey paint a hopeful picture in WNC. The majority of consumers in our survey purchase local food at least monthly. In addition, those classified as local food purchasers and those who purchased less often (typical) both expressed wanting to purchase more local food for their households (84% and 78% respectively). Although some barriers are related to complex issues such as food budgets and the location and hours of being able to purchase local food, other factors are more amenable to local interventions, including addressing clients' knowledge of where to purchase local food and to have increased labeling of local products by farmers and producers.

Ongoing Local Food Supports by ASAP and Partners

The goal of this research project is to learn more about current challenges and opportunities for farms and consumers and to make recommendations for improving marketing and communications to better support the direct market relationship. ASAP will use these findings in our core programming to help farms and partner businesses highlight the value of local food products, reduce barriers to purchasing local food products, increase transparency, and connect with consumers' priorities. We will incorporate aspects into future research and program evaluations that include a variety of audiences including farmers, farmers market managers, and shoppers.

ASAP ongoing local programming includes:

Promoting local food and farm outlets and connections. We publish the annual *Local Food Guide*, online database, and other materials to drive demand for local farm products and help consumers find them. Through ASAP's communications and by working with media partners we engage public interest by telling compelling stories about farmers and the local food system in our region.

Identifying local farm products. ASAP has developed the Appalachian Grown brand to be a known and trusted tool for identifying local farm products across the region. The program includes more than 1,300 farms and partner businesses in the region that sell local farm products. ASAP provides farms with access to discounted Appalachian Grown–branded packaging materials.

Offering experiences for community members to connect with farmers and producers. Events, such as ASAP's annual Farm Tour, CSA Fair, and periodic dinners featuring chef and farm partnerships give community members a stronger connection to local farms. ASAP also regularly provides opportunities for engagement with farms through facilitated activities at schools, farmers markets, and other community events.

Building farmer capacity, particularly around marketing and business development. We offer one-on-one support as well as in-person and virtual peer-learning opportunities for farms. Our Farmer Toolkit is updated regularly to include best practices and real-world farmer experiences around business planning, navigating market opportunities, and marketing and branding. We offer regular stand-alone workshops as well as the annual Business of Farming Conference.

Offering promotional and technical assistance to more than 100 farmers markets in the region. We offer resources such as the Farmers Market Toolkit, one-on-one consultations, networking and learning opportunities, and templates and materials for engagement activities. We also operate Asheville City Market, a year-round Saturday morning farmers market, where we can test and pilot new programs and customer engagement strategies.

Improving individual and community health. We engage healthcare professionals and allied-health providers in using local food and farm connections and products as a preventive health strategy.

Connecting chefs and food retailers with farmers. We make it easier for restaurant, grocery, and wholesale buyers to find farms and ingredients, promote local products on their menus and shelves, and build trusted and lasting relationships within the community.

Increasing access and resources for local food. We're reducing barriers for all community members to find and purchase local food, including through nutrition incentive programs like Double SNAP for Fruits and Vegetables and Farm Fresh Produce Prescription. We also create and distribute navigation resources, such as custom Google maps and printed bus maps with Buncombe County farmers market locations.

Engaging educators, kids, and families. Our Growing Minds Farm to School program works with schools and early childhood education centers to support educators in incorporating Farm to School and provide kids with food and farm experiences like gardens, classroom cooking, taste tests, local food in cafeteria meals, and farm field trips.

Read more about ASAP's programs at asapconnections.org.