



**Branding
Study
for
appalachian
local food economies**

by Lindsay Reul

Acknowledgements

This research was a pioneering effort from the Massachusetts Institute of Technology “Keeping Wealth Local” Clinic and the Central Appalachian Network, who partnered over their shared devotion to the betterment of Appalachian living.

The study could not have occurred without the supportive contributions and invaluable knowledge shared by Leslie Schaller of Appalachian Center for Economic Networks, Kathlyn Terry of Appalachian Sustainable Development, Marilyn Wrenn of Center for Economic Options, Natalie Woodrooffe of Real Food · Real Local Institute, Bridget Kennedy of Appalachian Sustainable Agriculture Project, Jill Young of Greenbrier Valley Local Food Initiative, and Amy Glasmire of the MIT Department of Urban Studies and Planning.

Special acknowledgements are to be given to Rural Support Partners, specifically Katy Allen and Andrew Crosson, for their time, guidance, and attention to detail that greatly enriched this study.



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Chapter 1 | Introduction to Appalachia and Background to the Food Branding Study

The local food movement has gained national recognition in recent years. Americans coast to coast have become increasingly interested in buying and supporting local food production, and local food initiatives have been springing up in communities of all political factions, sizes, and cultures. The local food movement is now emerging in deeply rural regions, changing the dynamics of local food economies from an urban scale of demand and geography to a much less concentrated demand pool and larger geography.

Within the Appalachian region of the United States, numerous communities and constituencies are working to develop local food systems on local, sub-regional, and regional scales. The Appalachian region, stretching from northern Mississippi and Alabama up to the Southern Tier of New York State, is broadly defined by its rural character, resource rich landscape, and geographic isolation, factors that often limit wealth generation opportunities. Economic development organizations, non-profits, businesses, and government entities in these regions have begun seeing the development of a local food economy as a means of wealth retention, job creation, and economic development for their local communities.

Numerous local food initiatives are independently operating in their respective communities, and more initiatives are growing on the horizon. With the growing

interest and rich histories of these Appalachian local food initiatives, there is a need for a more comprehensive understanding of how individual local food initiatives are collectively transforming food systems and market demand in the whole of the region. People are looking for ways to fortify and expand on the collective success of existing local food projects in the Appalachia region. Local food systems have in many cases reached a critical point where they are expanding into regional markets that present new opportunities and challenges for these initiatives.

This research was born out of a need to better understand the role of branding and marketing in moving local foods efforts in Appalachia to the next level. The Central Appalachian Network (CAN) seeks a deeper understanding of the importance of branding local food products, and the potential for a collaborative effort to connect existing sub-regional local food systems to regional markets. Given that place-based regional food branding is a relatively new field, especially in the context of regional economic development, this research aims to reflect the most informed understanding of the topic to date.

Study Region

This research is specifically focused on Central and Southern Appalachia. It largely excludes Appalachian Pennsylvania and New York to the north, and Appalachian Mississippi, Alabama, and most of Appalachian Georgia to the south. The remaining central and south-central region is considered the *study region* of this research. While the following information has been gathered from organizations representing locations in Southeastern Ohio, West Virginia, Southwestern Virginia, and Western North Carolina, products branded under their label are sold into neighboring states. The

study region is not defined with precise boundaries, but rather serves as a general and cohesive region under the auspices of CAN and CAN's partners.

Cultural Characteristics and Regional Nuances

Known for its ancient mountains, rich landscapes, cultural traditions, and the famous Appalachian Trail that traverses its heart, Appalachia is an enormous region that extends over 1,000 miles north to south, touches 13 states, and is home to over 25 million people. Despite some urban expansion and infrastructure development, the region on the whole remains largely rural and geographically isolated. While only 20% of the nation lives in rural areas, nearly 42% of Appalachians are rural inhabitants (Appalachian Regional Commission).

Because the Appalachian region is so socially, economically, and geographically complex, comprehending its many sub-regions and micro-cultures is a necessary challenge to furthering the development and economic stability of the Appalachian region as a whole. With each sub-region comes a different set of resources, knowledge, political environment, and socio-economic context. Coordinating efforts in distinct sub-regions can help leverage the successes of local foods work for a greater regional impact.

Each local food economy in Appalachia has risen and conformed to the nuances and resources of its sub-region. Since these sub-regions exhibit such different characteristics, respective organizations feel very little competition between their local food economies and brands, and those of neighboring sub-regions. Also, since most brands are based locally or sub-regionally, the detached geographic distance between each brand is so great that it too dissuades many competitive relationships.

Historical Geographic Isolation + Agricultural Tradition

The study region of Appalachia has a rich culture of homesteaders who have been growing their own food for centuries. Historically, this region has been a major self-sustaining foodshed, a pattern contrary to the current mainstream US food industry. This self-supporting food culture is partially due to the fact that this area has been, and remains, very geographically isolated. The legacy of this strong farming culture has formed the basis of a revived social interest in agriculture and local foods.

Pre-Existing Stereotypes

Appalachia has been, and often continues to be, the target of many stereotypes that negatively portray its culture and people. While harmful on a personal level, the perpetuation of these negative stereotypes is also crucial to address in the context of a marketing and branding strategy. Falsified negative images can translate into economic loss for Appalachian enterprises – an outcome which should be avoided. However, there is a growing national awareness of the value of Appalachia's cultural traditions, both folkloric and agricultural, that has great potential to reverse many of these negative stereotypes.

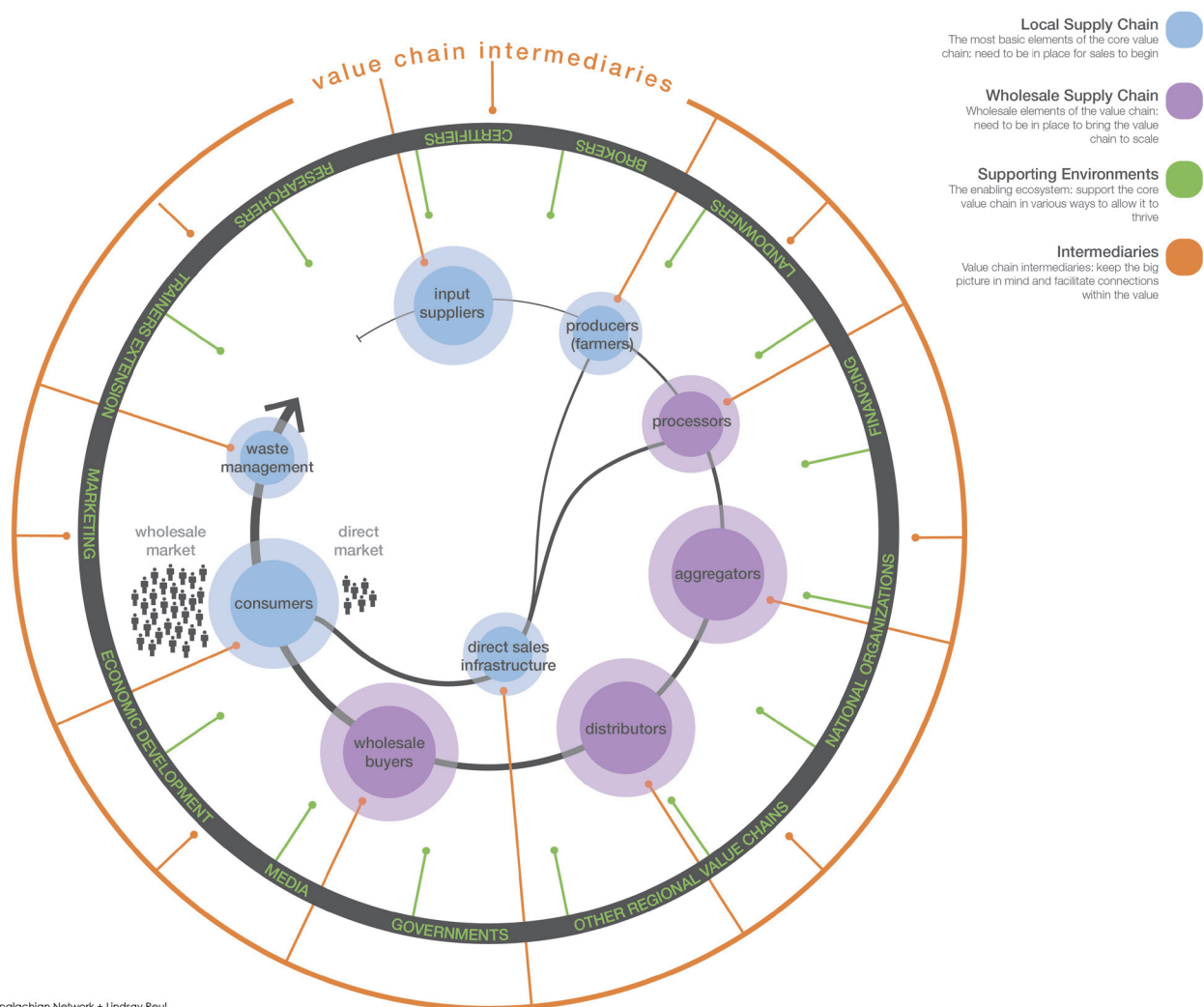
Anthony Flaccavento, an advocate for local food in Appalachia, astutely captured the steady departure away from Appalachia's negative stereotypes when he said "If a region known primarily for its coal mining, tobacco farming, and clear-cutting can come to exemplify sustainable development, it will be difficult to ignore (Haskell)." Central Appalachia already plays host to several major successes in local agriculture. In addition to the case studies explored in this study, the Athens, OH Farmer's Market, Ohio's largest open-air market, reaches capacity weekly and has a standing waitlist for vendors hoping to sell their produce. Asheville, North Carolina is known across the region for its specialty foods and many locally-focuses restaurants. Several reports concur with each other that local food systems are on the upswing in the region (Haskell; Hartz).

Appalachia is at the current front in the movement towards local food systems, and as the region keeps up with, or surpasses this leading trend, it will continually rewrite its reputation. Early anecdotal evidence of a 2012 study indicates that the value chains for local sustainable food economies are continuing to expand, reaching new markets and providing an enhanced quality of life for Appalachian food producers and their consumers (*Building Local and Regional Food Value Chains*). A sustainable Appalachian image is growing.

Description of the Food Supply Chain

Supply chains exist in nearly every industry and can be uniquely defined within each business, organization, and sub-sector. Food supply chains currently in place in the United States span national and international boundaries. In the quest to strengthen and build local food economies, CAN and the other Appalachian affiliations work at reducing the scale of the food supply system down to a local or regional geography. As such, understanding the local food supply chain referenced throughout this report is critical to understanding the following contents.

CAN's LOCAL FOOD VALUE CHAINS



Graphic by Central Appalachian Network + Lindsay Reul
Created using symbols from The Noun Project

Value Chain :: A network of businesses, nonprofit organizations, and collaborating players who work together to satisfy market demand for specific products or services.

Branding strategies have traditionally paid a lot of attention to the relationship between businesses and their consumers. However, the brand relationship between two enterprises is also extremely important. These business-to-business relationships construct the supply chain and have powerful effects on delivery, control, and supply. The effects of branding on the supply chain have become increasingly important in the global pursuit for environmental sustainability and corporate accountability. CAN's interest in exploring the ways a branding strategy can help to establish a robust and sustainable local food economy in Central Appalachia is a case example of this.

The Food Value Chain

CAN supports the development of to a specific type of supply chain which they refer to as a value chain. The value chain is a values-based supply chain – displaying qualities and ecosystems that support the core value chain. This model entails a very high level of communication.

Value chains exist all over the region. Each organization or specific food product may have its own value chain. CAN is working to support many of these value chains and connect them at the regional level. CAN's generic value chain model (shown here) is designed to accommodate several value chains of their affiliated and partnering organizations.

Wholesale Markets versus Direct Markets

One of CAN's primary focuses is to extend more of their value chains into wholesale markets. Distinguishing between wholesale markets and direct markets is important because the long term sustainability of Appalachia's local food economy relies on reaching both markets with the right balance.

The primary difference between wholesale and direct markets is in the role of an intermediary. Direct markets include CSAs, farmers markets, and other direct interactions between the producers (farmers) and the consumers. Wholesale markets require that a

processor sells produce to a **customer** who then sells it to **consumers**. Grocery store chains, restaurants, and other institutions like schools and hospitals particularly fit in this category as the intermediary customer.

All of the local food systems CAN supports began with direct sales. The first step of establishing a system is almost always to sell produce at the farmers markets, with CSAs, and making some sales to restaurants. Once value-added foods (canned and packaged products) or aggregated produce (products that require large volumes), are introduced, the scale of the operation, and thus the number of farmers and communities benefiting, can increase. However, a larger consumer base is needed to support this enlarged value chain. Reaching those large consumer pools frequently happens through wholesale retail sales. Thus, developing and strengthening wholesale markets for CAN affiliated products is a way of mainstreaming local food markets and trying to stabilize and sustain them. Stable and sustainable local food economies can better provide full-time jobs, reliable income for farm and food entrepreneurs, and broader community access to healthy local foods. That being said, farmers markets are extremely important to the local food economy. CAN does not want to replace farmer's markets with wholesale markets, but rather to expand upon these direct markets and supplement them with wholesale networks.

Since the quality, sustainability, and fairness of the product has to be communicated to the consumers indirectly through wholesale retail, sometimes via the grocery store brand, the value of the brand becomes really important. Direct market sales do not require as much of a branding strategy since the produce is sold directly from the farmer to the consumer.

Background of the Branding Discussion

Central Appalachian Network

The Central Appalachian Network (CAN) is a “network of networks” in Central and Southern Appalachia that was developed in 1993 to “advance the economic transition of the region” by working together to develop a shared analysis of the challenges and opportunities facing the region (Central Appalachian Network). Their strategy aims to connect and support diverse networks of rural community members, including producers, consumers, landowners, entrepreneurs, local-government officials, non-profit organizations, social enterprise businesses, schools and universities, students, and youth. CAN facilitates the communication and connectivity of these sub-regional networks at the regional level with the salient objective of achieving sustainable rural

development in Appalachia.

CAN is led by a Steering Committee of six member organizations:

- Appalachian Center for Economic Networks (ACEnet)
- Appalachian Sustainable Development (ASD)
- Center for Economic Options (CEO)
- Mountain Association for Community Economic Development (MACED)
- Natural Capital Investment Fund, Inc. (NCIF)
- Rural Action

Together, these organizations aim to create an Appalachian economy that creates and retains wealth locally, improving the quality of life in the region's rural communities in a sustainable way. CAN pursues this mission through a number of economic sectors¹. Most germane to this research is their interest in branding local Appalachian food products as a means to achieving this stated aim.

Using Local Food Systems for Economic Development

CAN has identified the development of local food systems as one opportunity with high potential for economic development in Central Appalachia. While the success of farming drastically differs across the region, from state to state and even county to county, several economic findings indicate a promising future for Appalachians with the development of sustainable local food economies. Several recent studies have shown that investment in local food systems have a disproportionately large effect on the local economy (Otto et. al.; Hughes). For every dollar spent on local food, another \$0.55 to \$0.78 is stimulated in other sales in the economy (Swenson). Direct market sales have increased 117% in the region from 1997 to 2007 (Martinez), and one study estimates that West Virginia would accrue an additional \$200 million in annual income if residents purchased even 5% more of their food from in-state sources (Meter).

The potential for a sustainable local food system to bring about stable economic growth seems very possible. However, bringing the current local food systems to the next level of scale and success will take significant and strategic support and investment. Collectively, as a region, Central Appalachia will need to hurdle

¹ To learn more about CAN and the services that they provide, visit their website at <http://www.cannetwork.org/>

their two greatest common challenges: (1) the small scale of their farming operations, and (2) their remote location from markets and infrastructure. Several Appalachian-specific reports concur that targeting larger-scale markets, expanding direct marketing channels, fostering collaboration within the region, and adapting infrastructure for distribution and processing for wholesale markets are needed to overcome these challenges. These reports also suggest that the development of a trusted local food brand is one tool which may help surmount these known challenges and reach stated goals (Central Appalachian Network; Haskell). CAN supports these findings and is specifically interested in exploring how branding at a regional level can influence the outcomes.

Context of Regional Branding Discussion

The topic of regional branding emerged in CAN's December 2011 retreat. The discussion started with an interest in scanning the current food brands managed by CAN members and partners to determine their success, to survey buyers and better learn their needs, and to conceptualize a regional brand or the coordination of existing sub-regional brands.

The topic was revisited in February of 2012 and clearer objects of pursuit were outlined. Central to CAN's interests were to fully describe what Appalachian brands existed and what products they were branding, what standards and criteria are deployed in successful branding strategies, and how to start thinking critically about a regional effort towards this goal of branding Appalachian food products. It is evident from reports of these conversations that CAN is in the early stages of a regional branding effort and at the phase where research is needed to inventory what assets exist in terms of food branding projects. The following three questions have outlined the current scope and objectives of this research:

- What is the status of the regional food brands in Appalachia?
- What elements of established brands elsewhere contribute to their success?
- How do we move forward in our own pursuits?

As a continuation of these internal discussions, CAN has collaborated with the MIT Keeping Wealth Local Clinic to answer these questions. Both research parties, CAN and MIT, are approaching regional food branding as a strategy towards economic development and rural wealth creation – a fairly innovative tool to use for these types of industries.

Purpose of this Research

CAN is seeking a deeper understanding of the state of the Central Appalachian food economy, the existing regional food branding initiatives, and the extent to which an organized branding strategy can enable economic development gains in the region. They are also interested in learning about components of successful branding strategies elsewhere to inform future steps for their own programs.

Specific to their situation, CAN wants to better understand the brands that exist in Appalachia, who manages these brands, where these brands are located, what products are being branded in the region, and what angle these brands are taking to market themselves. External to the Appalachian situation, CAN is also interested to observe other place-based food branding programs and learn what tactics, organizational structures, and effective program components they have deployed. The information they seek regarding their specific circumstances inform their Appalachian food branding portfolio.

More broadly, CAN seeks to better understand the value of both LOCAL scale and REGIONAL scale branding programs. Given their expansive network that covers a large Appalachian geography, CAN wants to learn how to best harness their collective reach without deploying brand strategies that are too large to function. Many of CAN's questions regarding best branding practices relate to product selection, geographic scale, and the role these strategies could potentially play in an Appalachian local food branding strategy.

Major Research Questions

At the outset of this research, CAN identified three main questions that they believe are crucial to informing the next phase of action:

- **How can we determine what types of product could be covered under a regional brand?** How does the diversity of products included impact the success of existing place-based brands?
- **Is there an ideal geographic scale for a regional brand? How is this determined?** At what scale can a food branding program function? Multi-county? State-level? Multi-state? Can a single product carry two levels of branding – local and regional?
- **What aspects of the region could a Central Appalachian brand focus on?** How can CAN introduce their regional component to a successful brand strategy? Which characteristics of the Appalachian region could be incorporated

into a regional branding strategy?

In the following sections, this research seeks to answer these three questions. The study was conducted by surveying a literature review of the best known branding practices, interviewing parties related to Appalachian food branding programs, cross-comparing case studies of regional food branding outside of Appalachia, and referencing supportive studies of Appalachian regional food brands.

Chapter 2 | Branding and Marketing Literature Review + Best Known Practices

This study explores a brief overview of conventional branding strategies and best known practices in order to give context to the contents of this paper, and to use as a platform from which to base informed recommendations. Two types of literature were reviewed:

- Conventional Marketing + Branding Literature
- Regional Place-Based Branding Literature

Information pulled from the conventional marketing literature was largely written for corporate and organizational marketing or branding strategies, but has many underlying lessons that apply to regional place-based branding efforts. The place-based branding literature is something of a sub-field to conventional marketing literature; however, much of this literature is written by authors in the planning, geography, design, and architecture fields. Literature in this sub-field was titled location-based branding, regional branding, city branding, and place-based branding.

This chapter contains a literature review and an overview of branding strategy best practices that are organized into the following four sections:

- Basics of Branding
- An Introduction to Place-Based Branding

- Brand Strategy
- Lessons Learned for Brand Strategy

Basics of Branding

Definition of Branding: An Extension of Self-Identity

Branding, in its simplest definition, is the commercial process of storytelling. Branding is a story designed to tell people who they think they are, where they come from, and most importantly, what they aspire to be (Twitchell; Dinnie)

Branding and the concepts of self and identity are very much intertwined. Consumers use products, brands, and purchasing practices to build their self-perception. Research has shown that consumers knowingly or unknowingly view their possessions and habits as an extension of their identity (Saren and Svensson). However, the consumer's identity and the *brand personality* are distinctly different and not to be confused. A consumer's identity is reality and a brand personality is a manipulation designed to create and embody aspirations (Saren and Svensson; Dinnie).

Definition of Marketing: The Facilitator Between Economy and Culture

Branding is a component of marketing. Marketing occurs where ideas and values, which typically come in the form of GOODS and SERVICES, are exchanged between different members of society. All marketing actions and ideas involve the exchange of something – products, services, knowledge, or money. BUYERS and SELLERS are the players on either side of that exchange (Twitchell; Saren and Svensson; Zwick). Branding, to use the same storytelling metaphor, is the application of a story to a good or service. A good marketing plan will have a

Bottled water retails for \$1.49 even though tap water, which is nearly the same product but without the story, is available for free.

memorable story, whereas an ineffective one is easily forgotten. Marketing is essentially the process of getting this exchange to work efficiently – making money by storytelling (Twitchell, 2004).

Branding is the Manipulation of Images and Media

Marketing strategies aim to (1) stimulate needs and aspirations in consumers that can only be fulfilled by consumption, (2) manipulate perceptions through BRANDING rather than modifying reality, or (3) create a sense of dependence in the consumers on the brand such that replacing goods and services with a substitute becomes hard. As evident here, branding is one component of a marketing strategy and must reflect a larger business strategy.

However, branding is the tool most purposely used (i) **to differentiate products** and (ii) **to create aspirations** for and in the consumers – arguably two of the most important objectives in a marketing relationship (Aacker and Joachimsthaler; Saren and Svensson; Dinnie; Homadovski). Since it is a tool that manipulates perceptions and images, branding is strongly associated with media and the role different media-forms play. Studies have shown that consumers actually prefer the manipulated and aspirational story to the quotidian reality. The value of an object does not necessarily reside inside of the object itself; rather instead it exists in the narrative surrounding the item (Twitchell; Saren and Svensson).

Brand Image vs. Brand Equity

The classic brand management model focused on short-term sales. Investment in brands made justifiable sense as a result because the return on the investment was seen immediately from these quick sales profits. Their measures were concrete – if the brand was effective, sales went up. However, the better branding strategies focus on building assets that will result in long-term profitability (Aacker and Joachimsthaler). In this new model, the brand manager's focus expands from a single brand to a product category. The goal is to make the brands within a category or business unit work together to provide the most collective impact and the strongest synergies.

In the past, branding has been discussed in terms of images. Today, the best branding strategies aim to build

brand equity, which is more complex and long-term than simply managing an image. Building brand equity entails a long-term strategy that supplements short term performance measures, such as sales and profits, to build assets for the future competitive advantage and profitability (Aacker and Joachimsthaler). These assets are linked to the brand in a way that add or subtract from the place, product, or service being marketed. This fact especially pertains to place-branding, since the perceptions of national, regional, or local identity are extremely resistant to change, and require long-term direction and permanent programming to enable the slow restoration and restructuring of the public perceptions surrounding a particular place (Pedersen; Homadovski).

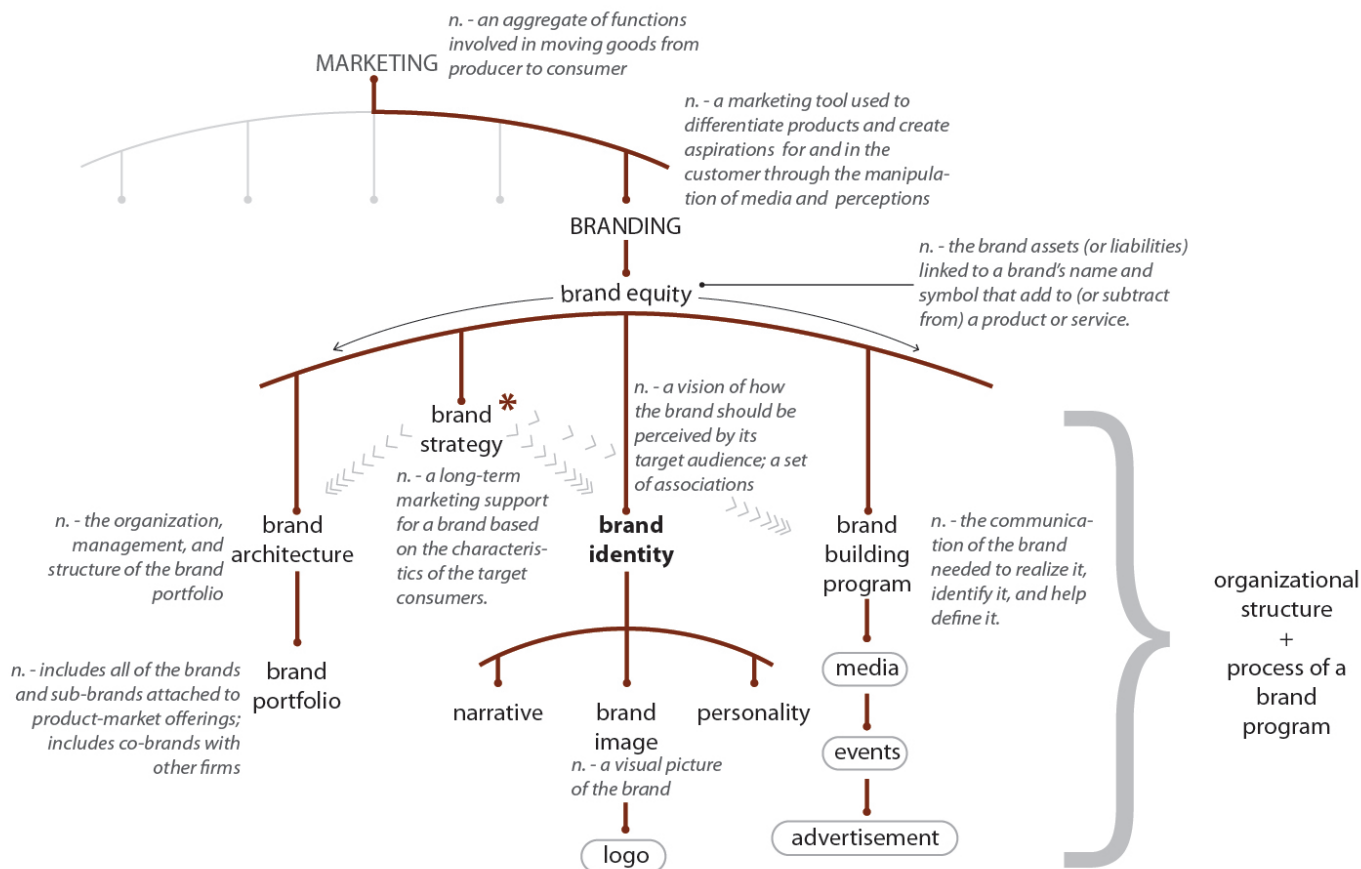
Nearly all institutions have multiple brands in their brand portfolio that can include sub-brands and co-brands with other organizations. The best branding practices advise firms to expand from a single brand and embrace multiple products in a product category. Firms should be involved in multiple markets simultaneously, using complex brand architectures, and manage multiple brands to capitalize upon opportunities for the most collective impact. Managing brands as stand-alone silos can result in confusion and creates to inefficiency. The driver of this new brand strategy is to establish brand identity, not focus on sales and shares.

Brand Identity

Central to a successful branding strategy is an effective *brand identity*, or a set of brand associations that imply a promise to consumers from the suppliers. In order for it to be effective, the brand identity needs to resonate with consumers. Whereas a brand image may represent the current situation, a brand identity represents what an organization can provide over time, and may indicate that the image needs to change (Aacker and Joachimsthaler).

Branding: Part Manipulation, Part Authentic

Branding is not all smoke and mirrors. The most successful strategies make optimal use of the authentic and historic elements of a place or a product, incorporating what is considered real, as well as manipulating images and perceptions. In place-based branding, strategies aim to generate narratives, imagery, and logos that best complement the existing infrastructure, landmarks, architectural style, and other



* The reality of the brand program is that each of these branding components support one another. The strategy dictates the design of the architecture, brand identity, and brand building program; the brand building program materializes the brand identity; and the brand identity achieves the agenda of the brand strategy.

givens that the region possesses (Twitchell; Saren and Svensson; Pedersen; Bruwer and Johnson; Dinnie). The successful marketing of a brand will claim to satisfy the authentic needs and wants of consumers because of the story that the brand tells.

An Introduction to Place-Based Branding

Place-branding is a process that applies the branding of commercial products to geographic locations, thus influencing their promotion and marketing, and devising new ways for a place to identify itself. It has been a trend in marketing discussions since the 1980s. Conventional brand management became of interest to governmental entities in the early 1990s, and has since become involved with political organizations, where brand management is now targeting territories (Homadovski; Pedersen; Twitchell). "The tendencies to have politics and capital transferred from states to cities, regions, and political suprastructures have, as their consequence, [made the] branding of a place [evolve into] a sub-specialization of marketing, design, and classic product branding (Homadovski)."

The primary task of place-branding is to strengthen the legibility of a location. This is a marketing objective under its simplest definition. If a place is not marketable,

there is no potential for social and, arguably, economic development. Anything unique and authentic to a location is a potential asset in its branding (Pedersen, 2004). Place-based marketing commonly occurs in origination locations for products such as food and wine. It has been shown that the image of the origination location has a significant positive effect on brand equity (Bruwer and Johnson).

Place-Based Branding Becomes Relevant as Globalization Persists

Place-based branding has become increasingly relevant to the field of marketing in response to the global economic environment. Firms, cities, regions, and nations apply place-based branding strategies as a means of differentiating their products, services, or territories to make them more competitive (Saren and Svensson; Homadovski; Bruwer and Johnson). The fast growth of economies that are integrated into the globalized markets makes all markets involved more competitive. As a result, there is a growing emphasis on product differentiation to remain competitive. Place-based marketing or branding is one strategy employed to create greater product differentiation, both in the sense that the products developed from a specific location can be branded, and that the location itself can be branded as

a product. In either situation, the shaping of the local identity of different cultures is important to the ultimate product brand (Homadovski).

Globalization Leads To Ethical Branding of Sustainability

In order to maintain a competitive edge, the pioneers in this globalized market have now turned toward the ethical branding of sustainability. Advertising their ethical business practices and sustainable strategies has become a new mechanism for transforming the practices of global corporations (Hart, 2007; Conroy, 2007). Local food initiatives and Slow Food movements have emerged in the food-related industries as a result of this campaign for sustainability (Lu and Reul). When companies began branding sustainability in an aspirational light, programs began to develop globally that both maximized profit and designed places, perceptions, products, and services based on value-oriented and environmentally-balanced development (Homadovski).

Same Branding Strategies Used in Conventional Marketing Apply to Place-Based Marketing

There are so many competitors in the global market that firms quickly take advantage of each other's mistakes and assume their business; sustainable strategies are forecasted to only increase in importance for corporate survival in the 21st century (Hart; Haufler; Trout). The market for consumer goods and services is becoming very similar to the market for experiences and places (Twitchell). The branding strategies are gradually conflating as unconventional applications, such as regional branding, are increasingly established and evaluated. Competitive sustainable strategies will become a necessity in the future of these location-based branding approaches. For this reason, those working to build local food value chains in Appalachia were advised to take proactive measures towards building a robust brand. Several lessons can be derived from conventional branding practices in the corporate marketing domain that can inform this process.

Appalachian Branding Efforts Should Become Proactive

Early adopters of sustainable measures in the food industry have voluntarily embraced high-value standards above the national norms for growing, processing, transporting, and distributing food-products by implementing organic, and local food practices. The voluntary adoption of higher-than-necessary standards is typical of young sustainable markets, often headed by small non-government organizations or local firms that are undercapitalized and overworked (Haufler; Hart). In the case of food, the most environmentally sustainable measures are simultaneously also a great economic fortification tactic. Establishing a voluntary

local food network may be driven by environmental sustainability values by those who have the luxury and capacity to uphold the higher standards, but the trend is simultaneously creating economic development opportunities for everyone, not just the typical young market actors. This dual benefit allows the moderate and low income members of society to participate, who may be more driven by the aim of achieving a livelihood than the sustainability trend.

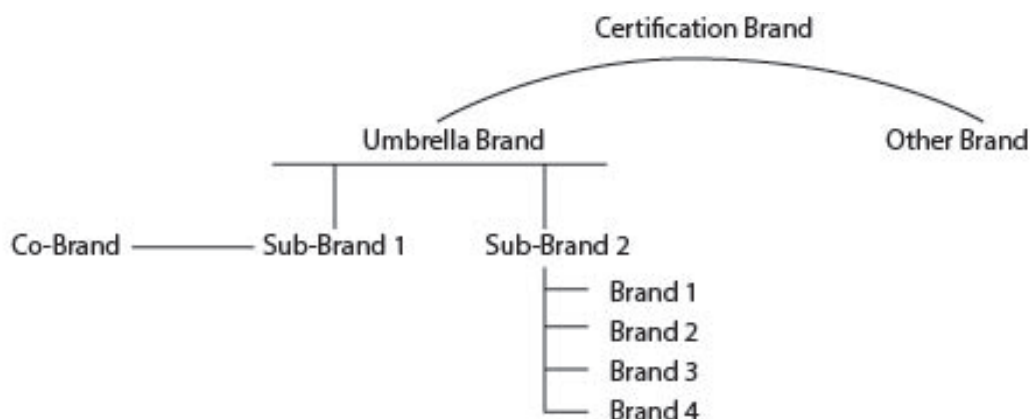
While several of the existing Appalachian food brands do not feel competition for their food services or products now, developing a stronger brand structure and strategy will prepare the long-term survival of today's efforts if regional food products popularize and raise competition. Similarly, these brands are primarily driven by an ethos devoted to the economic development of their localities, but following best branding practices that are established in a competitive market may at the very least create a stronger impact with benevolent branding efforts currently in place. By understanding the basics of branding, how it works, and what drives it in the commercial market, a better understanding may ensue for the other non-traditional commercial worlds like the place-based regional branding of food products (Twitchell).

Brand Strategy

Metrics and Verification

David Aacker and Erich Joachimsthaler portray a clear framework for the metrics of, and a strategy for, brand equity in their 2000 publication *Brand Leadership*, which I reference to provide the outline of this branding review. A successful brand strategy will result in strong brand equity. The measures of brand equity, which are good metrics to evaluate and verify its strength, are encapsulated in these four largely agreed-upon components:

- **Brand Awareness:** to what degree are people familiar with the brand?
- **Perceived Quality:** how valuable is the brand? (empirically shown to affect profitability; brands are only as valid at the level of a consumer's lived experience)
- **Brand Associations:** what images, product attributes, use situations, organizational associations, brand personality, or symbols connect the consumer to the brand? (much of brand management revolves around deciding what associations to develop and then creating programs that will link those associations to the brand)



- **Brand Loyalty:** how loyal are consumers to the brand? (the heart of any brand’s value and a strong focus of brand management where strengthening the size and intensity of each loyalty segment is a driver)

(Aacker and Joachimsthaler; Twitchell)

helm provides efficient and consistent decisions such that a set of common inputs, outputs, and vocabularies, for multiple products, markets, and sub-brand, can be monitored to prevent weakening.

2. Brand Architecture

Brand Strategy Framework

Aacker and Joachimsthaler have offered four categories of brand strategy metrics that construct a framework designed to establish brand equity and long-term profitability. These categories can be considered the four main elements of a brand strategy toolkit.

1. Organizational Structure and Process
2. Brand Architecture
3. Brand Identity
4. Brand-Building Programs

1. Organizational Structure and Process

Several sources, from both conventional marketing and place-based branding literatures, concede that having a clear and authoritative body to lead the branding effort delivers the best and most effective outcomes (Aacker and Joachimsthaler; Pedersen). Essentially, someone needs to be in charge. For smaller marketing endeavors, an individual or a designated team of people can serve this role. Larger branding strategies, which are commonly the case in place-based branding, have appointed a steering committee to make singular editing and organizing decisions¹. Central leadership at the

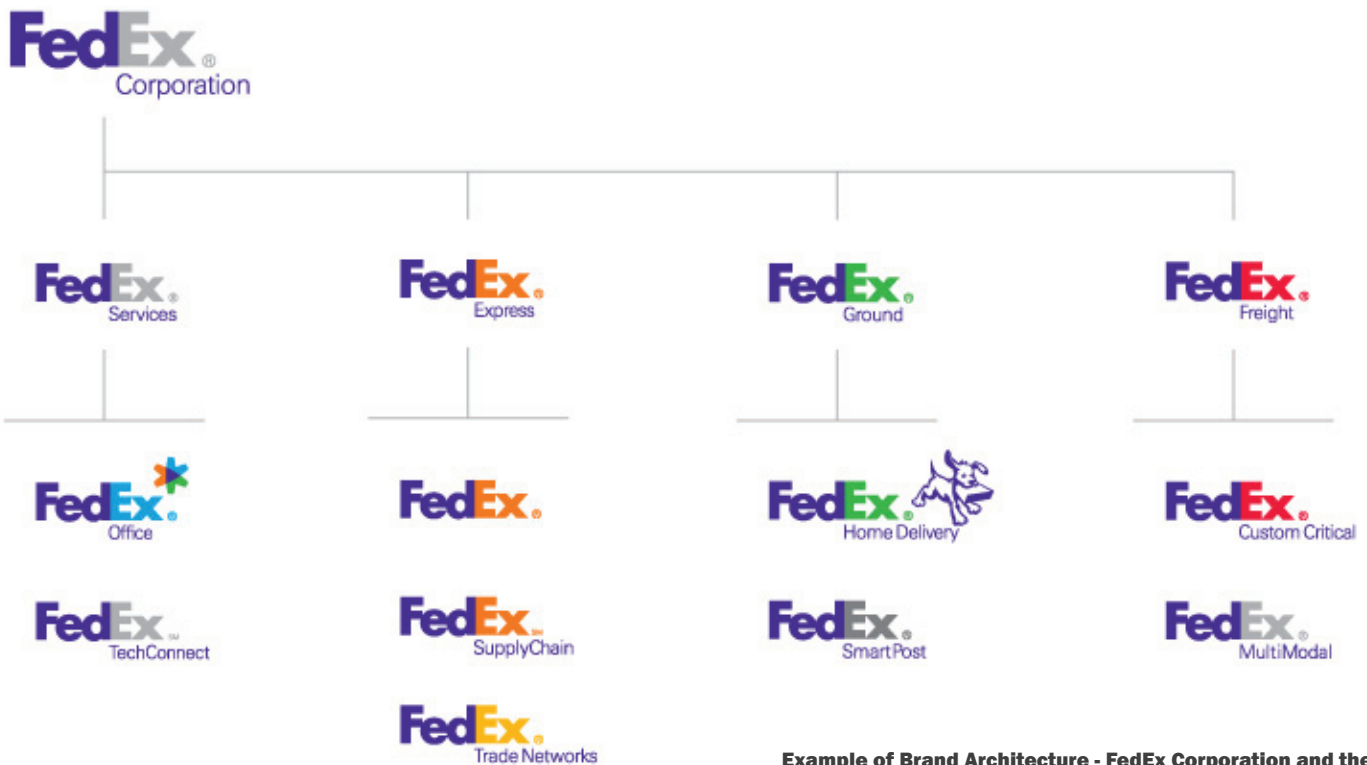
Brand architecture refers to the organization, management, and structure of the brand portfolio. It specifies brand roles and the nature of relationships between brands, and between different product-market contexts (Aacker and Joachimsthaler; Dinnie). Brand architecture is often displayed in hierarchy trees to identify these roles and relationships.

Most organizations have several brands within their portfolio. Firms are encouraged to employ multiple brands and brand identities because it gives them access into multiple different markets (Aacker and Joachimsthaler; Conroy; Saren and Svensson; Twitchell). This is seen as a clear and positive benefit for both the organization and, if managed well, the brands. *Brands should not be managed as individual silos, but rather always have a relative role.* The relationship between two brands or sub-brands is arguably the most important variable when designing the brand architecture.

The master brand (or parent, umbrella, or range brand) is the primary frame of reference, but is stretched by sub-brands that add associations (Aacker and Joachimsthaler; Saren and Svensson). Sub-brand relationships provide powerful opportunities and construct a context for one another that can:

- Address conflicting brand strategy needs
- Conserve brand-building resources in part by leveraging existing brand equity

¹ Chapter Four of this report explores several organizational structures through a series of case study analyses. Refer here for further reading about plausible options for CAN.



Example of Brand Architecture - FedEx Corporation and their sub-brand, Image courtesy of Landor Associates

- Protect brands from being diluted by overstretching
- Signal that an offering is new and different (Aacker and Joachimsthaler)

Certifications or endorser brands provides credibility and substance to the product or service being marketed by a lesser known or less established brand by providing a specific set of standards(Aacker and Joachimsthaler; Conroy).

Brand relationships range from a **Branded House**, which uses a single master brand to span a set of offerings that operate with only descriptive sub-brands, to a **House of Brands**, which contains independent and unconnected brands (Aacker and Joachimsthaler). The Appalachian brands described in this study most closely reflect the house of brands description, with all of their affiliated organizations driving their independent brand strategies.

A brand can be driven from the top down by the master brand or from the bottom up by the sub-brands. The driver role reflects the degree to which a brand drives the purchase decision and user experience. It can usually be identified when asked “What brand did you buy?” since the answer is most often the primary driver (Aacker and Joachimsthaler; Conroy). Allowing the sub-brand to play the driver role can be beneficial to a regional branding strategy because it will add associations that are relevant to the consumers in each micro-geographic region. In this sense, allowing a sub-brand to drive can stretch a brand into markets that it would not normally

have access.

A key dimension of brand architecture is to inform organizations when to stretch existing brands, when to employ a new brand, when to endorse a brand, and when to use a sub-brand. In regional branding, a large issue revolves around developing a strong umbrella brand that resonates with activities and identities across the geography (Dinnie).

The food industry is especially tethered to a geographic location and place-based branding. Branding food products with the origin location has been a political tool to promote economic and rural growth in remote regions. Branding a food product with the regional information has been shown to greatly enhance a consumer’s confidence in the value of the food product. One study in wine labels showed, almost without exception, that consumers greatly preferred wine that was branded with the broader regional information in addition to the name of the smaller sub-region. Lesser known sub-regions benefitted the most from including the regional name on the label (Bruwer and Johnson; Dinnie).

3. Brand Identity

The brand identity is the major vehicle that guides the brand building program, and it is therefore paramount that it not be perceived as confusing or ambiguous to consumers. Developing the brand identity is the key strategy to creating a demand for the product, and to

differentiate it from all other desired products – the two key tasks of a brand strategy. Some of the most common mistakes are made in developing the brand identity. When building brand identity, it is important to cut through the clutter and design a clear concept. A brand can potentially reflect different product attributes, personality dimensions, organizational associations, and user images, but best practices prioritize the multiple associations into a coherent identity. Since an identity is aspirational, and not reflective, a key decision to make is whether to leverage given associations and perceptions of a region, or to move the brand into a direction of different associations (Aacker and Joachimsthaler).

Especially true in place-based branding efforts, a brand identity needs to be developed from the inside out; the community of local actors within the region to be branded needs to legitimize the proposed identity believing, assuming, and promoting it. The brand image will ultimately fail if the actual inhabitants are not included (Haufler; Pedersen). This point seems relevant whether the consumers are the local residents themselves or the region is being marketed to an outside audience.

Regional branding identities are invariably perceived by both a local and a non-local population. Place-branding supports social organization, developmental policies, and programming for tourism in the local context. Places usually engage with the outer world and must therefore communicate a clear concept to the non-local public (Dinnie; Homadovski). The focus of the identity can be intended as a reinvented local identity, a representative persona marketed to the global realm, or most likely a hybrid of these two.

4. Brand-Building Programs

The brand building programs are the agents which communicate the brand identity to the consumers. The program itself will help shape and define the identity, and typically utilizes different interactive media, direct response, promotions, and IT options as the vehicle to provide the relationship-building experiences between the brand and the consumer. However, the more proficient brand building programs will construct a scheme that moves beyond advertising (Aacker and Joachimsthaler). It is especially important that the brand building program be accompanied by a system of tracking verification. Successful brand management requires measurement. As described above, solely relying on short term financial indicators (profits and sales) will undermine the brand equity rather than build it.

We understand the communication of a brand to include

all of the identified points of contact between the brand and the audience. The brand building program should aspire to connect with the consumers at an emotional level. Branding a region for its food products often entails revitalizing the native food culture as an extension of the regional identity. The consumer audience is often a non-native who is searching for a food experience that matches their idea of the region. Identifying the consumer audience and anticipating their needs will help inform the program that supports the identity of the brand (Aacker and Joachimsthaler; Dinnie; Zwick).

Expanding the Range of a Brand

Expanding a brand is a common interest in both the commercial and place-based branding realms. Extensions leverage existing brand assets, and enhance a brand's exposure and association in different contexts. The temptation to extend is often great since the alternative decision, building a new brand, can cost over three times as much (Twitchell). However, poorly constructed brand extension strategies dilute brand associations and dilute the overall brand. A brand should only migrate to where it fits, where it can add value, and where the new association enhances its equity (Aacker and Joachimsthaler; Bruwer and Johnson). Market research will best inform whether extending the brand is wise or not.

Lessons Learned for Brand Strategy

Today there are so many competitors in the market that simple mistakes can quickly cause a business to be knocked out of the game. While the market for regional food products in Appalachia has few identified competitors within its borders, best practice suggests that organizations none-the-less take a proactive role to fortify their brand and brand strategy for the anticipated increase of competition from products outside the region. The unanticipated trends in the future market may lead to fast changes which may require quick adjustments from unprepared organizations. The past ten years of corporate and place-based branding experiences have generated several salient lessons that should be applied to any efforts to develop place-based brands in the region.

Know the Brand Identity

Much of the success in a brand comes back down to the success of the brand identity. Some of the most common mistakes are made during the development of the brand identity (Aacker and Joachimsthaler). Most essential is to craft a clear, strong identity. The cardinal error is to confuse or complicate the brand identity where the consumers and businesses must ask "what are

you selling?”

Describing a product, especially if it's a new category or new technology, can be challenging since it may have multiple associations that reflect the different product attributes, personality dimensions, organizational associations, symbols, or user images. Organizations need to make key decisions right at the start to prioritize which brand attributes – the current image or the new crafted aspiration – to associate with the identity (Aacker and Joachimsthaler; Trout).

Setting these priorities will also avoid a brand strategy that tries to craft an identity that is everything for everybody. A brand that is many things fundamentally cannot be any single one of them (Trout, 2001). Firms should select singular attributes to promote, resolving to be strong in some areas rather than weak everywhere. Find the driving idea behind the brand, or the sweet spot that will optimize the connection to the consumers in the market (Aacker and Joachimsthaler, 2000). Then clarify, clarify, clarify.

Involve the Consumer in the Identity of the Brand

It is especially true for place-based branding efforts that the brand is an extension of self-identity and the identity of the region. People can be vehemently protective and loyal to brands they feel connected to (Twitchell). In regional branding efforts, many members of the value chain, from producers to wholesale customers to consumers, are often local inhabitants. Therefore, when developing the identity of the brand, the image must have buy-in and validation from the population it represents. The branding of a place should be a democratic, participatory process. Involving the local population in the design process of the brand identity can be crucial for its survival; regional branding efforts have failed in the past because the decision makers focused too heavily on strategic designs and new vocabulary rather than local involvement to rename the home space (Homadovski; Aacker and Joachimsthaler; Pedersen).

Connect with Target Audience

“Companies don't create categories for new products – users do” (Trout, 2001). Most decision-makers understand the basic economic principles of how supply and demand drive the market, but when new products or brands are emerging on the scene, lessons from the past show that companies cannot force the issue with supply alone. Instead, the consumer and the producer become involved in a relationship and co-create products and services together. With this understanding, consumers do more than merely purchase what the producers have to offer (Zwick).

The relationship between producers and consumers is an engagement of personal interactions. In order “meet” the consumer, producers must create and typify a personality for the consumer such that they take on a more concrete form. Producers target their audience in this way, and go from regarding the consumers as distant entities to seeing them as flesh-and-blood individuals (Zwick; Aacker and Joachimsthaler). The ultimate goal, after all, is to connect with consumers on a personal level. Consumers with a strong connection to a regional brand are likely to become more involved with the place and consume more of its products. Regional branding efforts should be targeted at these high involvement consumers rather than their low involvement counterparts, because they will likely be more influenced by brand-based cues (Bruwer and Johnson).

Target the Audience with Clarity and Conciseness

Identifying the target audience is only half of the process in forming this producer-consumer relationship. Reaching the targeted consumers with clear and tailored messages is equally as important. Past experiences have emphasized the importance of “breaking out of the clutter,” meaning that the clear and concise differentiation of brands, products, and messaging is crucial to a competitive market (Trout; Aacker and Joachimsthaler; Zwick). Targeting consumers with streamlined exactness is improving as the amount of data on consumers tastes, allegiances, income, and location becomes increasingly available. The skill in branding is to take these complex relationships between consumers and their “things”, and reduce them into a singular clear concept that can be embodied in the brand.

Push Brand Building Programs + Innovation to Build the Overall Brand

Communication involves all points of contact between the brand and its audience, not just advertising images. Products are key to the brand and brand building can include product design or new products, but decision makers should invest effort into brand building programs beyond products and images (Aacker and Joachimsthaler; Zwick). Connecting with the consumers on an emotional level may mean devising new distribution strategies, engaging with social media interfaces, raising awareness through live events, or making connections with endorsements. Brand building involves innovation. The constant evolution of consumers' interests and aspirations change rapidly, and need stimulation from fresh and original concepts. The best applications of brand building programs evolve and innovate in order to maintain a connection, and to stay

relevant, with their consumers.

Relating The Lessons to Central Appalachia

“Many conventional studies of the marketing of food, for example, are split into traditional market categories of food consumption, agriculture supply, processing and manufacture, food products, distribution systems and food advertising, and each is researched and analyzed separately...this type of structure is completely unsuitable.” (Saren and Svensson)

Informed opinions in the marketing industry are predicting that the sustainability movement will only become more central to consumers’ purchasing decisions in the future. Corporations are finding that sustainability branding is a driving factor in their marketing success. This culture will soon spill over into the place-based branding sphere and become an identity that differentiates locations as globalization persists and competition elevates (Haufer; Hart; Conroy). It would be beneficial to develop a branding strategy that incorporated characteristics of the region as well as claims to ethical and sustainable production practices. This will pave the brightest path forward for this region’s local food initiative and its corresponding economic development objectives.

Chapter 3 | Current Appalachian Brands

Four brands of local Appalachian food products currently operate in the central and southern Appalachian region. More local food initiatives are known to exist in this area, however their small scale or ephemeral longevity have precluded them from this study. Of the four brands surveyed here, three of them are affiliated with CAN. The fourth brand, Appalachian Grown, is managed by an organization not affiliated with CAN. A fifth local food brand, Greenbrier Valley Local Food Initiative, was included in this study despite the fact that it has not yet materialized into an operational brand program. Instead, it was included to better understand the design components of a regional brand in the planning phase.

This information was collected from interviews with Leslie Schaller of ACEnet's Food We Love, Natalie Woodroffe of the Real Food · Real Local Institute's 30 Mile Meal, Kathlyn Terry of ASD's Appalachian Harvest, Jill Young of Greenbrier Valley Local Food Initiative, and Bridget Kennedy of ASAP's Appalachian Grown. These interviews were supported with information extracted from each organization's public resources and recommended reports.

Food We Love

The Appalachian Center for Economic Networks (ACEnet); A CAN Member Brand

Snapshot

Food Product: Value Added Processed Food Products (Specialty Foods)

Intended Market: Direct and Wholesale Markets for Local, State, and Regional Consumption

Epicenter of Local Food Economy: Athens, Ohio

Defined Region of Local Food Economy (Territory of Supply): The food originates in Appalachian Ohio – the southeastern most corner of Ohio, roughly including Washington, Morgan, Athens, Meigs, Hocking, Vinton, and Gallia Counties, Ohio. The food products are then processed in ACEnet's Food Ventures Center, a shared-use Food Manufacturing and Commercial Kitchen Incubator in Athens, Ohio

Geographic Location of Brand Consumers (Territory of Distribution): The Food We Love (FWL) food products are prepared for direct and wholesale markets according to each entrepreneur's business incentive. Products appear in higher concentrations in Athens, OH than elsewhere, but reach regional markets and urban centers as far as Columbus, Ohio with a fairly strong presence in commercial retail franchises and independent grocery stores. Some specialty and natural food products have even been distributed nationally and internationally. High variation occurs in the distribution territory because of the individual missions of each food entrepreneur.

Objective of the Brand Program: ACEnet aims to provide entrepreneurial support at each node of the food supply chain. The focus of the brand is to identify products from the Ohio foothills and the region as the artisan food center of Ohio.

Brand Program and Economic Model: FWL is the brand strategy for an economic model that is designed to aid regional entrepreneurs developing specialty food products. The brand focuses exclusively on value-added agriculture and niche marketing in the specialty foods sector. The brand management team



provides infrastructural and business transaction support in addition to marketing access. Extensive training and technical assistance to new and expanding food enterprises focuses on product development, wholesale channel opportunities and marketing partnerships. ACEnet serves as an incubator of small business resources in Athens, providing retail, warehouse storage, meeting space, and administration to their affiliated entrepreneurs. They structure their model around forming networks between individual businesses, offering shared spaces and resources to leverage together and create a stronger economic impact. The FWL brand is an optional tool available to the entrepreneurs affiliated with ACEnet's incubation resources, but it offers prime placement in a network of major regional commercial retail locations. Food Ventures Center graduates and clients within the support network participate in the brand programs as they expand their wholesale opportunities.

Brand Management Team: ACEnet is a non-profit microenterprise development organization with CDFI capabilities through ACEnet Ventures, a sister organization to ACEnet. They provide access to loans and non-financial resources to help rural entrepreneurs overcome their marketing and small business challenges.

Brand Program's Strongest Influence: Infrastructural Needs + Small Business Entrepreneurial Consulting.

Information

ACEnet serves as an incubator to aid small food industry entrepreneurs from the Appalachian OH region reach mainstream markets. The FWL brand is one of several shared resources available to all affiliated individual businesses. It specifically focuses on value-added food products that require processing and packaging. The FWL program covers a wide array of product lines from

processed and packaged specialty foods, meat, dairy, grains and specialty crops. The strongest focus for wholesale market channels continues to be on specialty food lines that have a longer shelf life, and qualify as specialty or natural foods in grocery stores. The brand really focuses on this value-added specialty sector of the local food economy where capital costs related to processing infrastructure and equipment can be disabling for small food producers.

ACEnet offers assistance at every level of the food supply chain, but can be described in two parts: preparing food products for market (product development) and creating the space, access, or demand in the market for the products (marketing). The FWL brand strategy is a tool that is most useful for the marketing portions of the supply chain. It helps entrepreneurs who operate under the brand name increase their market share by improving the market awareness of their food products and eventually increasing sales. The brand management team offers consultation on basic marketing concepts, developing marketing plans, and meeting the national and retail regulatory requirements.

The FWL brand program offers product placement and quality control in addition to marketing and consumer education. The brand management team has delineated a path to large marketplaces by partnering with several local and regional grocery stores, such as Whole Foods, Kroger, and Giant/Eagle, which have devoted commercial shelf space to the FWL brand food products. Kroger devoted an entire aisle to FWL products by 2004. The quality control is the key value that the FWL brand offers to its affiliated products since the brand is now highly regarded within the specialty foods sector and garners a lot of positive recognition.

ACEnet invested in the construction of a shared kitchen

processing facility to help individual entrepreneurs hurdle the infrastructure and equipment barriers to producing for larger marketplaces. The Food Ventures Center supports multiple commercial food manufacturing processes by providing shared FDA and ODA production, storage, refrigeration, freezer, and distribution space. A rotation of tenants can rent space in this Food Ventures Center until their business becomes more lucrative and they are able to graduate into their own space. Tenants are able to sell their products under their own unique brand identity, or take advantage and use the FWL brand to market their product; the FWL brand is entirely optional.

Key Take-Away Points of this Brand

ACEnet launched FWL in 2000, but had been working with food producers on curating a local food economy since the 1980s. The brand was launched after over a decade of building networks and support. The FWL brand now has a high profile and greatly reinforces Athens Ohio's image as the epicenter of local and artisanal food production. The success of the brand is greatly attributed to the establishment of an informed and enthusiastic local food culture in southeastern Appalachian Ohio.



30 Mile Meal

The Real Food · Real Local Institute + The Appalachian Center for Economic Networks (ACEnet); A CAN Affiliated Brand

Snapshot

Food Product: Both Raw Produce and Value-Added Processed Food Products

Intended Market: Direct Market for Local Consumers (local farmers markets, restaurants, and food retail locations)

Epicenter of Local Food Economy: Athens, Ohio

Defined Region of Local Food Economy (Territory of Supply): A concentric 30-mile radius from Athens, OH defines the region. This initiative reaches into 69 towns and 10 counties within a 30 mile radius of Athens. The 30 Mile Meal Project works with over 130 partners within this defined region.

Geographic Location of Brand Consumers (Territory of Distribution): The model of the 30 Mile Meal (30 MM) Program is structured such that the supply and demand territories are exactly the same. The brand is designed to hold value within the 30 mile region (some ancillary value extends beyond the 30 mile region due to tourist interest in local foods).

Objective of the Brand Program: 30 Mile Meal aims to increase the production, consumption and sales of locally-sourced foods, resulting in greater earnings for those that grow, produce, serve or sell local foods. These aims build a more robust, sustainable and locally-driven economy.

Brand Program and Economic Model: The 30 MM Brand Project adheres to a strict 30 mile radius. The program only recognizes food products that originate and are consumed within this local foodshed. Very low barriers to entry exist for participants. Any farm, local food entrepreneur, market, retail center, handler, and restaurant within the 30 mile radius that can demonstrate its production, sales or use of local foods is invited to participate in the initiative. The brand follows the food products, and the producers and handlers of the products are eligible to display the brand label, indicating their involvement. The primary objective of the label is to assist consumers in locating local foods and to increase the consumption of locally produced foods.

Brand Management Team The 30 MM Project was initially managed by the Athens County Visitors Bureau in partnership with ACEnet, a regional economic development NGO with microenterprise CDFI capabilities. The ACVB made significant investments in launching and maintaining the Project during its first two and a half years. In the fall of 2012, the Project created the Real Food · Real Local Institute to house the Athens 30 Mile Meal effort as well as new regions adopting the 30 Mile Meal model. While the ACVB has scaled back its financial support for the Project, it continues to provide significant in kind support. The Institute's mission is not only to continue the implementation and expansion of the 30 Mile Meal brand in southeast Ohio, but is also working with other regions in adopting their own 30 MM brands.

Brand Program's Strongest Influence: Defining the parameters of the local foodshed and building partnerships to support and expand its impact.

Information

The idea for the 30 MM Project was born out of work Woodrooffe managed on behalf of the Association for Enterprise Opportunity and funded by the Kellogg Foundation (2006-10) to help stimulate rural entrepreneurship development. Six regions were selected to develop strategies that supported economic opportunities for local artisans, sustainable tourism, and specialty food producers. Appalachian Ohio was one of these regions, with both ACEnet and the ACVB actively involved. These organizations partnered and carried the knowledge over to the emerging 30 MM project concept in 2009, building upon the nationally emerging *locavore* trend. The 30 MM was designed to capture the full potential of the region's local food movement, and augment its brand forerunner, Food We Love.

The 30 MM Project springboards off of the 30+ years

of work and networking on ACEnet's part in the Athens Ohio region. It was designed to be a larger umbrella than what the existing ACEnet FWL brand offered – one that the entire local foods producing community could stand under. Many of the participants of the 30 MM brand came from pre-existing relationships with ACEnet as they continue to be the main force in this local food economy.

The success of the 30 MM Project has resulted in a lot of recognition for the region and has piqued the interest of other regions for adopting the concept. The 30 MM model is now being replicated in three other regions: Huntington, West Virginia; Youngstown, Ohio, and Licking County, Ohio. The launch of these new regions has been supported, in part, by CAN's Small Grants Program. Woodrooffe and ACEnet's Schaller have created a 30MM Learning Cluster comprised of key local food advocates and producers from all the regions, including Athens. New resources are in development under the purview of the Real Food · Real Local Institute, including a website that will feature all 30MM regions. While the expectation is that it may take some of the regions some time to develop as broadly or as quickly as Athens, each region offers a testing ground for the brand, i.e. What does 30 MM look like in a more urban, Rust Belt setting like Youngstown or what does 30 MM add to Huntington VW where national attention on its lack of access to healthy foods was championed by Jamie Oliver?

The brand building program utilizes several media and communication channels to activate the brand. The brand management team oversees:

- an updated website, featuring all of the 30MM regions and serving as a public resource tool
- a blog providing personalized narratives of the value chain players and to make the behind-the-scenes connections more transparent
- a Facebook page and electronic newsletter, to maximize consumer exposure
- local foods related events, including an annual 30 Mile Meal Month and Restaurant Week to generate enthusiasm and support for the brand and its beneficiaries
- several collaborative partnerships with other organizations, to leverage aligning efforts and maximize collective expertise

These conduits of communication are managed daily and often have an exponential effect when used together. Using social media outlets to increase community awareness and support for local foods players allows pushing this information to different portals to maximize

the number of people who gain exposure to the information. “Someone will post something to our Facebook that we then push to our newsletter, etc.” (Woodroffe)

The brand management team has stated that they are most interested to better assess the impact of their brand, and to know what key elements are critical to the brand’s success. Without a formal economic impact study of the local foods economy in Southeast Ohio, they utilize existing aggregated revenue numbers. Receiving broader and more exhaustive information from their entire region would be helpful since it would provide a baseline that would illuminate how the economy is growing. The desire for this kind of information is seemingly common of place-based programming since the market is a region and not a controlled environment.

Key Take-Away Points of this Brand

The greatest challenges with this 30 MM brand are in measurement and verification. The management team struggles to measure the dollar impacts of their brand program. However, many of their 30 MM partner farmers report increased sales to local eateries year-round, thanks to efforts to engage restaurant owners in sourcing their menus using local ingredients. Informal surveys of the community reflect recognition of the brand and pride in supporting the local foods producing and selling community. In the last six months the Project has reached out to Ohio University faculty to assist them in tracking and researching their impact. Inspection and enforcement of the brand’s proper use is currently ad hoc, and only occurs when producers dispute a restaurant’s claim of using their products. The management team plans to address this issue through its 30 Mile Meal learning cluster and a best-practices forum as the model expands to new regions.

The 30 MM program’s greatest advantage thus far has been the initial investment by the Athens County Visitors Bureau. ACVB’s vision in seeing the valuable connection between the growing interest in local foods by visitors to the region, and its board’s willingness to provide start up support has positioned the Project to move towards forming its own nonprofit. ACEnet remains the key partner in building the brand, an aim that serves the needs and missions of both organizations. It was ACEnet’s involvement in CAN that brought new resources to the Project in 2012 and hopefully will continue in 2013. ACEnet’s knowledge, networking, and other resources have been essential to the success and growth of the 30 MM brand in both the Athens region and emerging new regions.

The brand curates a “local hometown” image that

reinforces the message of buying from and supporting one’s neighbors. Unlike FWL, it elects to exclude major franchises, such as Kroger. Keeping the image of the brand rooted in farms, markets, and small locally owned businesses, including restaurants, is an important value of the brand identity.



Appalachian Harvest

Appalachian Sustainable Development (ASD); A CAN Member Brand

Snapshot

Food Product: Certified Organic Fresh Produce and Free-Range Eggs; Starting to Brand Conventional Fresh Produce As Well

Intended Market: Wholesale Markets (via distribution centers and food brokers) for Predominantly Organic + Some Conventional Food Products; Some Marginal Direct Market Sales for Organic Food Products

Ideally ASD would like to increase the amount of local organic produce sold to local consumers, however the primary consumer markets for organic produce lie outside of the region and are reached through wholesale distribution. Many products do not come back to the region. They are transported to distribution facilities of retail handlers and produce brokers that sell higher concentrations of organic produce. The stores that buy the produce are usually quite far away.

Epicenter of Local Food Economy: Abingdon, Virginia

Defined Region of Local Food Economy (Territory of Supply): The production region is contained a selection of farms in Southwestern Virginia and Northeastern Tennessee near Abingdon, VA. The extent of the local region is primarily established by the capacity of the brand management team to oversee the brand operations. Direct markets (restaurants, farmers markets, etc.) are quite limited in the region, but a marginal amount of organic produce is still sold directly. In ASD’s case, how they define their “local” region dictates how the program will work.

Geographic Location of Brand Consumers (Territory of Distribution): ASD does not know the full extent of the distribution territory. The Appalachian Harvest model heavily focuses on aggregation produce from the region, and distributing it to wholesale storage facilities of retail food suppliers and produce brokers. Once in the buyer’s possession, ASD has little to no control of the food products or brand. The buyers decide where to ship the food products and further distribute them to markets of their choosing. However, to the best of their knowledge, ASD believes their food products are reaching the major metropolitan centers in the Southeast as far south as Atlanta and inland as Knoxville. Once the food products go into the mainstream distribution circuit, they can just go.

Objective of the Brand Program: ASD designed the Appalachian Harvest brand to create a sustainable wealth generating economy by connecting the region’s farmers with urban markets that have a greater demand for organic produce.

Brand Program and Economic Model: Appalachian Harvest is a program that most heavily focuses on the economic model (to bring produce to market) and, to a lesser degree, the brand program. The economic model is structured around agglomeration logistics and distribution strategies and dictates the need to stock produce at high volumes for distant retail centers. The branding of these products is realized through outreach at local levels and packaging labels for wholesale markets. However, ASD only brands organic produce at the wholesale level. Conventional products are only brokered, not branded, because labeling conventional is very expensive. Therefore, the conventional products take on the brand of whoever sells them. Appalachian Harvest is currently only an organic brand.

Brand Management Team: ASD is a 501c3 Non-Profit Organization with a distinct focus on building self-sustaining food and forestry economies in their region. Appalachian Harvest is solely owned by ASD and a network of their affiliated farmers.

Brand Program's Strongest Influence: Aggregation and Distribution – getting local produce out of Appalachia to viable markets affordably.

Information

ASD initiated Appalachian Harvest in 2000 to provide area tobacco farmers with an alternative source of income. The program introduced organic farming to the region, training farmers to grow certified organic produce and to prepare their produce for wholesale markets. Appalachian Harvest is building capacity and infrastructure for farmers who would otherwise have limited resources to sell their produce professionally to major grocery stores like Whole Foods or Ingles. The brand program bolsters the local farmers by providing infrastructure and management, and extends their continuity with the marketing outreach and brand labeling.

Aggregation is a very large component of this model. ASD knew their desired outcome of getting remotely located produce to high concentration markets very well, and understood that aggregating products from multiple farmers greatly reduced the cost of distribution. Collecting food products from the dispersed farmers is a great logistic challenge. Appalachian Harvest therefore invested in aggregation infrastructure – primarily two 53' tractor trailer distribution trucks and the construction of a packing house in Duffield, VA – to reduce the barriers to the wholesale markets. Much of the Appalachian Harvest aggregation strategy is determined by how far a farmer can drive his produce in order to reach the packing house. However, the strategy allows ASD to group market products for the farmers, who would otherwise be less successful in marketing their products to these types of retailers.

In Appalachian Harvest's wholesale model, bringing the products to market is really a joint partnership between ASD and the grocery store buyers or produce brokers. Once the food products are in the possession of the grocery stores, ASD has little control over the handling, management, and marketing of Appalachian Harvest products. They cannot inspect, measure, or verify their brand because the grocery stores are located so far away from the region. ASD is largely at the mercy of the grocery stores to make final decisions. ASD prepares brand labels and banners to identify the products, but each chain may have their own look and feel to their

produce. For example, Whole Foods wanted ASD to conform their marketing materials to the Whole Foods template. However many stores are very good about profiling the Appalachian Harvest growers and are excellent marketers with far more resources to market the products than ASD. Therefore, ASD does not spend a lot of time marketing Appalachian Harvest as a brand; they haven't needed to.

The grocery stores know their customers much better than ASD, who has little contact with the consumers in the wholesale markets. ASD is able to tell which of their products are in highest demand from the supply side – what the retailers and brokers purchase is what consumers are presumably demanding. However, for the local direct markets, ASD spends a lot of time marketing and educating consumers about organic foods. Consumers in the production region are relatively uninformed or unengaged with the value of organic products, limiting the volume of direct sales to local consumers.

"Local" is perceived as the most important buzz term to the customers in the wholesale markets. Since almost all of Appalachian Harvest's food products are organic, everything had to be labeled accordingly to comply with the certification standards. However, now that Appalachian Harvest is beginning to break into the conventional market, the brand will probably not become an organic label, but rather straddle both conventional and organic food products, and take on more of a *local* brand focus.

ASD foresees that they may need to begin doing more of their own marketing in retail locations as they continue to break into the conventional foods market. The supply of conventional foods is much larger than organic and upholds very different parameters than the organics market. They have just begun trying to work with some conventional products and are really in a learning phase of this market.

Key Take-Away Points of this Brand

Aggregation, building capacity with infrastructure, and group marketing are great enabling strategies that ASD does very well to get isolated food products into wholesale markets. This is an attractive model for remote Appalachian farmers who do not live near the urban centers where there is a concentrated demand for their produce.

The wholesale model that ASD uses for their organic products requires that they relinquish a lot of control after the distribution stage of the supply chain. They are somewhat at the mercy of the grocery stores and cannot necessarily impose the use of their Appalachian

Harvest branding methods. As a result, most of Appalachian Harvests brand programming is focused on local consumer outreach and logistics strategies, and they receive little feedback as to the most successful and effective means of representing their products in the marketplace.

Framing the local farm products as organic is seemingly not the highest branding priority. The use of the *local* foods brand may prove to be more effective and less regulated. As a result, ASD is broadening their affiliation to include conventional produce. The impact of preparing both conventional and organic produce for the wholesale market under a “local” label may be seen in the near future.

In either market, conventional or organic, aggregation will likely be the key focus of Appalachian Harvests brand model. This is their specialty in regards to the Appalachian local food supply chain. The aggregation model is seemingly adaptable to the shift in the marketplace and can support multiple food products for the wholesale market.



Appalachian Grown

Appalachian Sustainable Agriculture Project (ASAP); Not A CAN Affiliated Brand

Snapshot

Food Product: All Food Products

Intended Market: Direct Markets for Local Consumers (via local farmer’s markets, restaurants, and food retail locations); Appalachian Grown is also Reaching Some Wholesale Markets Beyond the Designated “Local” Region

Epicenter of Local Food Economy: Asheville, North Carolina

Defined Region of Local Food Economy (Territory of Supply): A 100-mile radius from Asheville, NC includes a 50 county region. The region is not a concentric circle, but includes the 23 western most counties in North Carolina, and a county or two deep into the neighboring states of Virginia, Tennessee, Georgia, and South Carolina.

Geographic Location of Brand Consumers (Territory of Distribution): While the territory of supply is concretely defined, the territory of distribution really depends on the individual farmers, and is consequently much more loosely defined. The brand was intended for local producers to use for local consumers – all within the defined territory of supply – as a means of distinguishing local food products in the marketplace. However, because the brand is a tool for the farmers to use however they choose, the brand shows up in distant markets where farmers may elect to sell their produce. While ASAP does not monitor or evaluate the value of their brand for consumers outside of the defined region,

Handler :: A handler is a firm which does not actually grow or produce any food themselves, but rather handles the food and puts it into a different context or business – be it a grocery store, or a retail outlet, or a restaurant, or a distributor of goods.

the Appalachian Grown brand can hypothetically show up in markets as far as Florida.

Objective of the Brand Program: ASAP's objective is to maintain the integrity of the market for locally grown food for the region's farms, and to create economically viable markets for the region's farms, throughout the whole regional value chain – from farmer to end consumer, including products moving through the wholesale market. The brand is deployed to distinguish local food products in the market place and to protect the integrity of the meaning of local products.

Brand Program and Economic Model: Appalachian Grown is a certification program, not a conventional brand. Farms can become certified with Appalachian Grown and use the brand to label their food products. Food handlers, tailgate markets, and processors participate by signing a license agreement, allowing them to use the logo per certain criteria. Once certified farmers can then use the brand as they choose – selling to local markets or distant distributors. The certification has only two requirements: (1) that the food products come from a family farm, and (2) that they originate from inside the defined boundary. The design of the brand program says nothing about the practices, products, or approaches used by each farmer, and allow each enterprise to conduct their business entirely unmonitored.

Brand Management Team: ASAP is a 501c3 Non-Profit Organization with a distinct focus on building local food economies in their region by connecting farmers to markets and support networks, and by reconnecting people to the process of food production.

Brand Program's Strongest Influence: "Making the Rules" – Providing definitions and parameters of the local food market.

Information

ASAP chose the certification model for their brand out of a reaction to the over-use of the term "local" in their market place. As means of maintaining legitimacy of what food products were authentically sourced locally, the Appalachian Grown brand is designed to create parameters and definitions for the local foods market in Southern Appalachia. By deploying the brand as a

certification, ASAP has more control as to where the logo shows up, thereby managing the quality and authenticity of the certified food products to a much higher degree.

In addition to establishing a concrete authenticity to term *local*, ASAP wanted to differentiate the small family farms from the large corporate farms. For example, Tyson Food, Inc. has many poultry farms in their area, however ASAP wanted to prevent these farms from having the same advantages as the local family farms and would not permit their logo on the corporate farm products.

The Appalachian Grown brand certifies farms and stipulates the use of the local label for food handlers. The verification for each typology differ, ranging from relatively clear cut (farmers), to very elaborate detailing defining what constitutes *local* (processors). When food products are processed together, the certification model is forced to trace the lineage and percentages of every food item in the mix. Extracting local food systems out of the conventional food network and infrastructure is a great challenge. Deploying a certification model to distinguish the local system from the conventional has proven to be a lot to manage.

The boundaries of the local food region are concretely set. Farms located just on the other side of the boundary are unable to use the Appalachian Grown brand. While this is unfortunate, the firmness of the regional parameters is necessary to maintain the authenticity of the food's *local* status. ASAP found that 100-miles is an appropriate quantifier to define a local food system, and have set their region as a rough 100-mile radius from their market concentration in Asheville, NC.

ASAP only monitors and evaluates the impacts of the Appalachian Grown brand within their set boundary. The brand is intended to identify food products originating within the 100-mile radius for the consumers living within that 100-mile radius. However, since farmers and food entrepreneurs can use the brand however they choose once certified, the logo often seeps out of the region. Many farmers sell their produce to distributors and far reaching retailers, so the brand is unintentionally reaching markets beyond the scope of the local region.

Appalachian Grown overlaps with several other local

food brands. Most are smaller county level brands that are entirely enclosed within their region. These small programs tend to be more ephemeral – erecting and vanishing as their funding cycles come and go. Appalachian Grown also shares some overlapping geography with Appalachian Harvest – although the extent to which these territories overlap is not largely known by either organization. To date, these two brands do not coordinate program efforts because they are each focused around different program models and geographic market centers.

Key Take-Away Points of this Brand

The term *local* has become a buzz word in the food industry. Left to their own devices, players in the food supply chain have begun to greenwash their food products with the use of the *local* label to gain marketing advantages.

Certification requires a much higher degree of measurement and verification than other branding models. It takes a lot of time and involves extensive data bank management. However, because it defines “local” with such precision, the certification of local food really illuminates food resource locations and greatly disambiguates the contemporary food system.

While ASAP expressed an interest in becoming acquainted with the other brand programs under CAN’s auspices, they are cautious about expanding network geographies of the labels. The local food movement is by definition a micro-enterprise which requires small scale territories and custom tailored program design to constitute local. However, they do see great value in working together or co-branding with local food programs that overlap with their territory.

Increased demand for local food representation by more farmers, handlers, and interested organizations is indicative that the market for local food designation is growing and perpetuating. ASAP recognizes that this movement has a strong stake in Southern Appalachia’s future.



Greenbrier Valley Local Food Initiative

Greenbrier Valley Economic Development Corporation; A CAN Affiliated Brand; Not Yet Established

Snapshot

Food Product: Primarily Grassfed Beef (Value-Added Food Product) and Some Livestock (Pork, Turkey, Lamb, Chicken); A smaller percentage of Fresh Produce

Intended Market: Direct and Wholesale Markets for Local Consumers (via local farmer’s markets, restaurants, and food retail locations)

Epicenter of Local Food Economy: Greenbrier Valley, West Virginia (Monroe County, Greenbrier County, and Pocahontas County, West Virginia)

Defined Region of Local Food Economy (Territory of Supply): The Greenbrier Valley region includes Monroe, Greenbrier, and Pocahontas, County West Virginia. While the brand management team is aware of similar beef-producing farm economies in the adjacent Summers County and Raleigh County, they will begin the project by focusing on the three-county region – the heart of the valley. These three counties defined the Greenbrier Valley Region before the idea of the Local Food Initiative was born.

Geographic Location of Brand Consumers (Territory of Distribution): Branding the local food is initially intended for its local consumption. However, the local food will likely be eventually distributed beyond the local borders since the region can grow more food and produce more livestock than what can be consumed locally. The management team anticipates that the branded food products will reach markets as far as the metropolitan centers on the Atlantic coast, such as metropolitan DC,

Baltimore, and perhaps Philadelphia.

Objective of the Brand Program: The Greenbrier Valley Local Food Initiative aims to reverse the economic losses of the region by retaining more of the resources and food dollars that originate here.

Brand Program and Economic Model: The Greenbrier Valley Local Food Initiative is still very much in the planning phase of the program, but the model will likely focus on aggregation and distribution of local produce to local consumers. The brand management team is planning to devise distribution mechanisms which will deliver the local produce to the consumers in the same local region. Given the degree of geographic isolation and rural character of the region, these logistics may become a central focus of this model.

Brand Management Team: The Greenbrier Valley Economic Development Corporation is a regional economic development organization created by the state of West Virginia that gave rise to the Greenbrier Valley Local Foods Initiative in 2010. The Local Foods Initiative is a brand management agency whose purpose is to support local food projects so as to increase the economic return to farmers in the region.

Brand Program's Strongest Influence: Creating a local system of aggregation and distribution, both physically and socially.

Information

The Greenbrier Valley is an extremely rural area that has historically been very geographically isolated. The region was once a very self-sufficient foodshed that began suffering when the process of food production evolved to its current mechanized system. The region has been producing food for years though and currently has four times as many cows as residents.

The Greenbrier Local Food Initiative intends to address the lost economic opportunities of the region due to the agriculture and food industry structure. In West Virginia, only \$0.19 of every food dollar is returned locally, indicating that \$0.81 of that dollar goes out of state. The brand management team is looking to create a Greenbrier Valley brand that raises awareness of the origin location of the food. A secondary objective of creating the brand is to increase the sustainable quality of the region's food by reducing the carbon footprint and food miles of the region's current food system.

About 90% of the farms in the Greenbrier Valley Region are cattle producing farms. The region also produces some pork, lamb, turkey, and chickens, but is primarily beef. A recent economic study encouraged the Local

Food Initiative to continue to shift their focus back on livestock as the primary production. This region produces high grade grass-fed cattle that are very valuable throughout the food industry. West Virginia calves are in high demand by stocker operations, and in the past have been selected to distribute their gene stock worldwide. The management team has identified their grass-fed beef as distinctly unique in the nation.

The strength of the valley is drawn from the strength of the grasslands. The grasslands produce healthy grass-fed cattle that are processed into beef. In the current food supply chain, calves are raised to a certain age in West Virginia grasslands, and then sold off to stocker operations in the Midwest to get fattened up on corn. The subsequent beef is sold as conventional grade meat. The objective of the Local Food Initiative is to grow cattle to their full maturity on West Virginia grasslands and sell the subsequent food product as value-added grass-fed beef.

Organic certification would probably not succeed in this region. There are far too many rules for a culture of people who moved to West Virginia to avoid such types of regulations. As a result, organic will not be a focus for the pending brand.

Aggregation and distribution are a large part of making the local food economy feasible in this region. The Food Initiative intends to establish a distribution mechanism that works in the region to deliver local produce to local people. This may involve logistics planning and finding aggregation and distribution routes in the region.

The Greenbrier Valley region is a part of one functioning aggregation and distribution network. The Monroe Farm Market is an online farm market that aggregates produce from 25 different farmers once a week year round and delivers it to Charleston, the West Virginia state capital. They have been in operation since 2006 and have been so successful that they were just recently able to register as a cooperative with the state. The Monroe Farm Market have been building 30% sales for several years and returns approximately \$110,000 in gross sales.

The local food brand is still very much in the planning phases and is currently working on the community development stage. The management team is gathering support from the County Commissioners and recognizes that the launch of the brand program is still in the future. The culture of the region makes this a long term project.

Key Take-Away Points of this Brand

The region is very geographically isolated. The online market (Monroe Farm Market) seems to be the most successful model in place because it overcomes the

physical isolation of the region’s landscape.

Fragmentation and isolation seem to be the greatest challenges in creating a feasible local food economy. This translates into a need for aggregation and distribution logistics.

The way in which to start a brand is suggestively to identify the core target geography, and if the model and demand allow it, the brand territory can expand in time.

The Greenbrier Valley local food economy will rely on consumers in proximate and distant markets since their production volumes are larger than their local consumer pools.

An Appalachian brand could really help the Greenbrier Valley brand by expanding the Valley brand’s reach. Appalachia has a much broader consumer base because it is more recognized by non-locals.

Analysis of the Four Existing Brands in Central + Southern Appalachia

A cross-comparative review of the four Appalachian brands exposed good information about the region’s local food branding effort.

Key Distinctions in the Central Appalachian Brand Programs

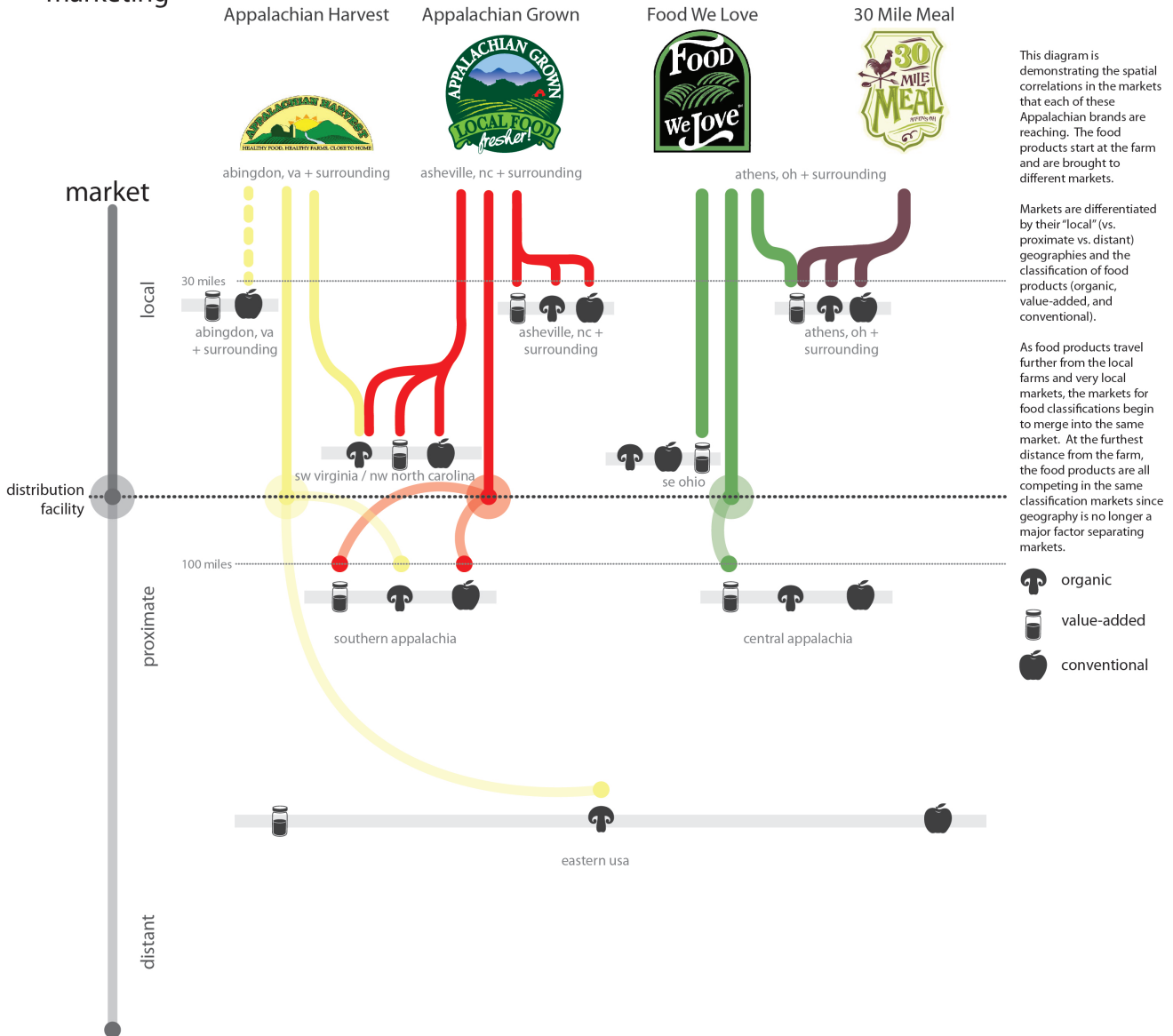
Observing the food supply chain in Appalachia, the brand management organizations each try to identify their regions’ gaps and challenges, and then design their strategy to provide entrepreneurial support at the most urgent node of the supply chain. Education and training is a component of every brand strategy, but key distinctions between each brand expand the general portfolio of brand strategies applied in Central Appalachia.

Each brand strategy is designed to tap into different places in the market spectrum of direct to wholesale market. The 30 MM brand focuses exclusively on direct markets. ASD focuses Appalachian Harvest almost entirely on wholesale markets. ACEnet designed FWL to enter both direct and wholesale markets. ASAP designed Appalachian Grown for the direct markets, but the brand seeps into wholesale markets per the farmers’ decisions.

| Brand | Market |
|---------------------------|----------------------------|
| 30 Mile Meal | Direct Markets |
| Appalachian Harvest (ASD) | Wholesale Markets |
| Food We Love (ACEnet) | Direct + Wholesale Markets |
| Appalachian Grown (ASAP) | Direct + Wholesale Markets |

The decision of where to locate the brand and on what point in the supply chain to focus most of the organization’s resources is jointly informed by the brand’s mission and the area’s challenges. The piece of the value chain where each brand attaches its name varies from brand to brand. The 30 MM brand is primarily attached to entities where local foods can be purchased (farmers and retail markets and restaurants) and focuses on growing community awareness and demand for local food products. ACEnet attaches FWL primarily to processing and focuses on the processing infrastructural needs with Food We Love to enable small entrepreneurial food processors into the market. The ASD Appalachian Harvest brand is both attached to and focused on aggregation and distribution by providing processing and distribution infrastructure for small farmers to reach high demand markets. ASAP’s Appalachian Grown brand is attached to the geography of the production region, and focuses on the development of a set of criteria for marketing – parameters, definitions, and promotion.

marketing



This diagram is demonstrating the spatial correlations in the markets that each of these Appalachian brands are reaching. The food products start at the farm and are brought to different markets.

Markets are differentiated by their "local" (vs. proximate vs. distant) geographies and the classification of food products (organic, value-added, and conventional).

As food products travel further from the local farms and very local markets, the markets for food classifications begin to merge into the same market. At the furthest distance from the farm, the food products are all competing in the same classification markets since geography is no longer a major factor separating markets.

- organic
- value-added
- conventional

| Brand | Location in Value Chain | Major Focus |
|--------------------|-------------------------------|----------------------------|
| 30 Mile Meal | Direct Sales Retail Locations | Social awareness + demand |
| Appalachia Harvest | Aggregation + Distribution | Aggregation + Distribution |
| Food We Love | Processing | Processing Infrastructure |
| Appalachian Grown | Geography of Production | Set of Criteria |

It is the initiative most focused on branding as a tool for economic development and creating distinct retail products. This brand operates the most like a for-profit business.

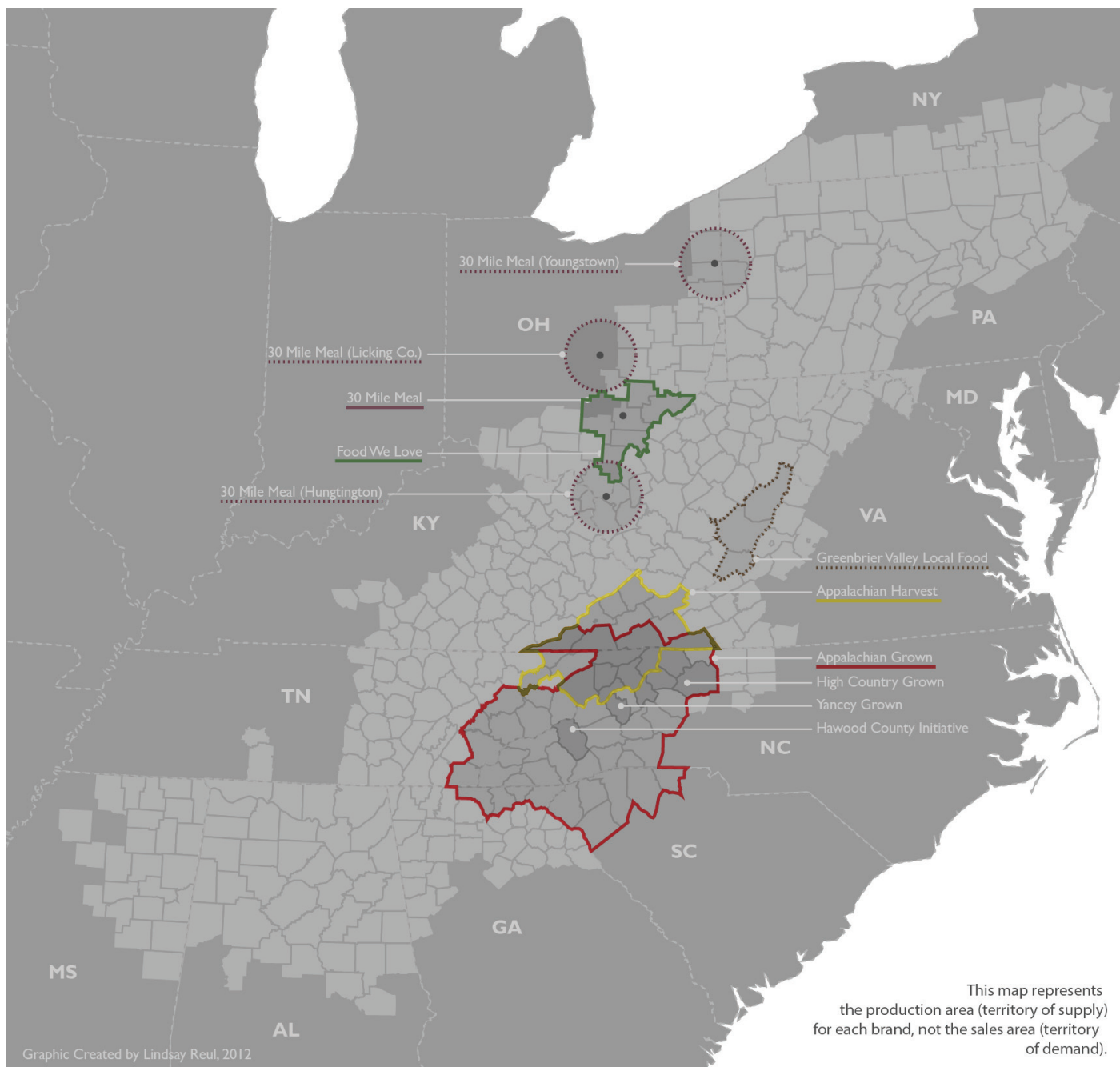
Appalachian Harvest had the most flexible and adaptable model. At the time of this research, the brand was expanding into a new market. This brand seems to be more aware of the weaknesses in their region's food supply chain, but less assured of the best strategy to deliver the greatest amount of aid. As a result, the brand program is quite open-minded and exploratory.

Common Threads in the Central Appalachian Brand Programs

Several salient themes were found across the different Appalachian food brand programs. These are not lessons

The Real Food · Real Local Institute's 30-Mile Meal and ASAP's Appalachian Grown program share the greatest similarity amongst the interviewed brands. They share a strategy model that defines their local food economy by a distinct radiating distance. Both expressed similar challenges such as encountering pressure to expand their boundaries and include interested food producers beyond their defined regions.

ACEnet's Food We Love brand is the most distinct model.



to be learned or facts to be judged, rather they are points which seem to apply cross-comparatively to most of the existing brands in the Central Appalachian Region.

The image of the small family farm is important to the image of local food in Appalachian brands. In addition to farm location, the scale of the farm is also important when using the term local as a label. Brand management teams intentionally curate the image of the small family farm within their local food brands, even though large family farms exist and are important to a local food economy. Corporate farms exist within these local boundaries as well, but are intentionally excluded from the local food label.

Identifying what constitutes local food becomes challenging as the value chain becomes more complex, but ultimately depends on each brand’s definition of

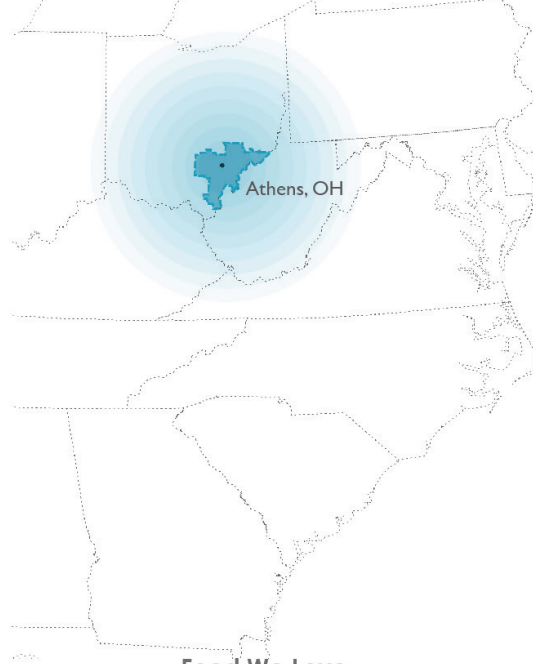
local. The local origin of food is hard to track if it gets processed and distributed. Differences between brands arise when defining what processes and locations are permissible to still consider value added foods as local. All brands require some degree of inspection and verification, whether this occurs on an ad hoc basis, or is a central component of the brand structure (certification).

Most brands have a regional structure with an epicenter and defined edges. Many of Appalachia’s sub-regions have a well-defined economic hub or epicenter city that accounts for much of the local foods market. Despite some regions extending 100 miles over rural terrain, regions often identify, physically or figuratively, a central location to focus around. Most of the time, the epicenter is the town or city where the managing

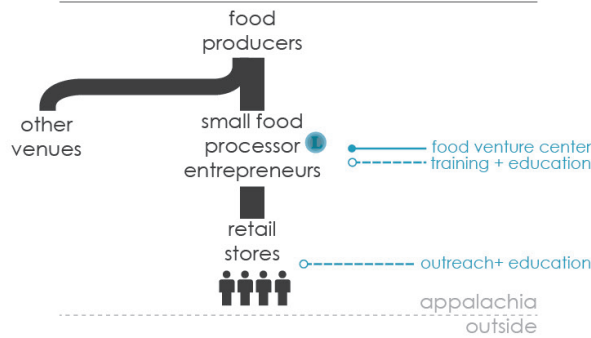
organization is located.

Brand programs are resolute to keep the boundaries of their production region fixed. Not one brand program, including the emerging Greenbrier Valley brand in West Virginia, expressed an interest in expanding their boundaries. Instead, the most common response to addressing the growing demand for local food economies was to create new programs.

LEGEND :: Distribution Territory Supply Territory Food Region's Epicenter
 Maps courtesy of us gis



Food We Love
ACENet



MARKETS: direct retail
 direct farmer's market
 wholesale retail

PRODUCTS: value-added

MODEL: umbrella brand for local food producers

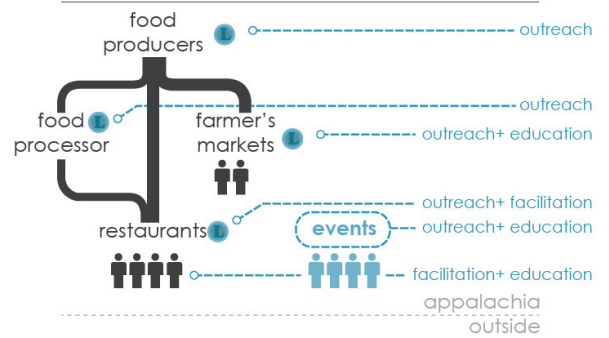
BRAND: IDENTIFIER of local produce for local markets + REPRESENTING appalachia to non-locals

OBJECTIVE: local production, local consumption

BRAND DISPLAY:
 LOCAL intentional
 NON-LOCAL intentional



30 Mile Meal
Real Food · Real Local Institute + ACENet



MARKETS: direct restaurants
 direct farmer's market
 direct retail

PRODUCTS: produce
 value-added

MODEL: umbrella brand for all local food producers, processors, and handlers soley recognized in the local region

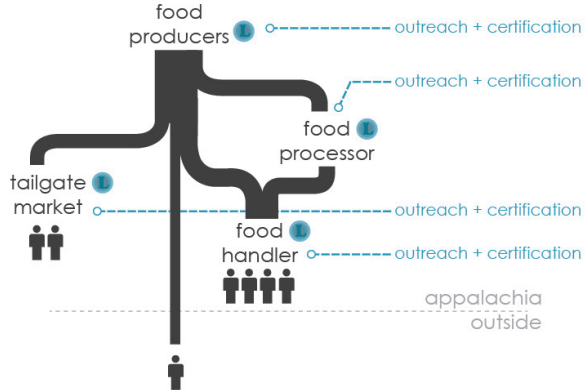
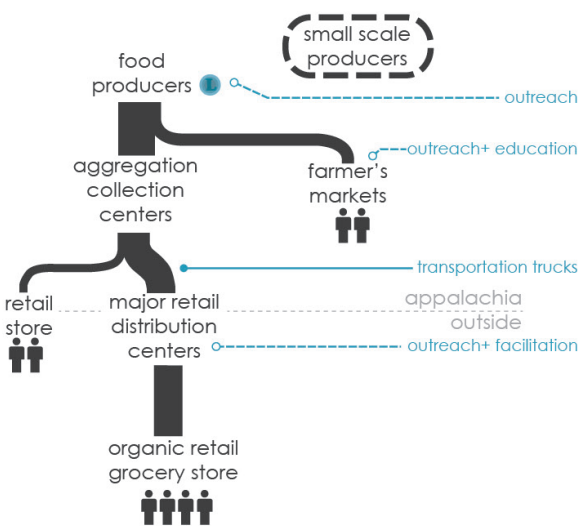
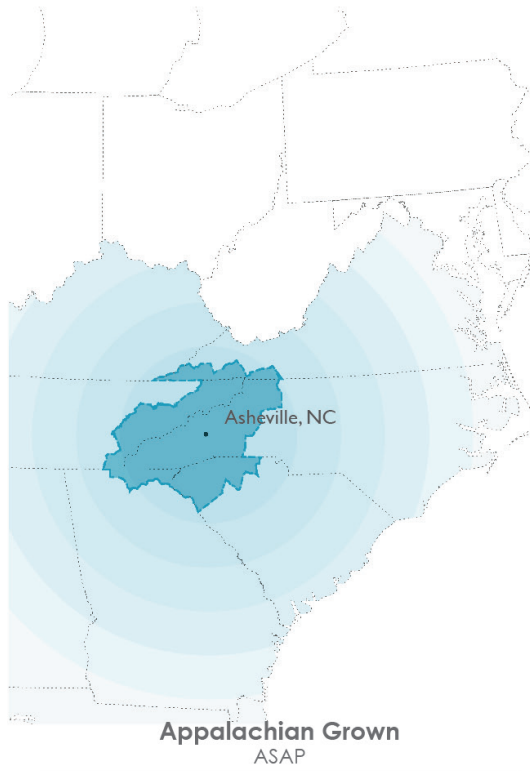
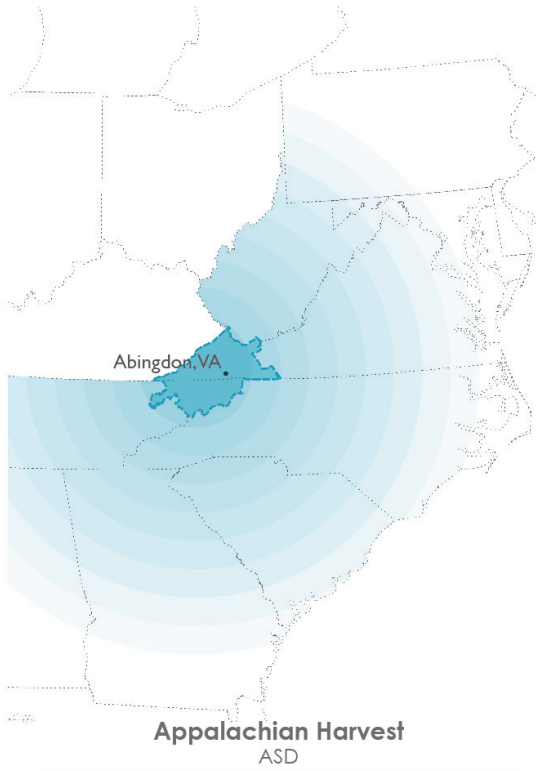
BRAND: IDENTIFIER of local produce for local markets + REPRESENTING appalachia to non-locals

OBJECTIVE: local production, local consumption

BRAND DISPLAY:
 LOCAL intentional
 NON-LOCAL n/a

LEGEND :: supply chain brand intervention physical intervention program activation
 Images courtesy of The Noun Project consumers additional consumers location of brand assignment

Graphic created by Lindsay Reul, 2012



MARKETS: wholesale organic retail
 direct organic retail
 direct farmer's market
 << wholesale conventional retail >>

PRODUCTS: organic produce
 produce

MODEL: brand organic produce grown in
 appalachia + bring it to market

BRAND: IDENTIFIER of local produce for local markets +
 REPRESENTING appalachia to non-locals

OBJECTIVE: connect local produce to accessible
 markets

BRAND DISPLAY:
 LOCAL intentional
 NON-LOCAL intentional

MARKETS: direct retail
 direct restaurants
 direct farmer's market

PRODUCTS: produce
 value added

MODEL: certification to verify food products as
 authentically local

BRAND: IDENTIFIER of local produce for local markets

OBJECTIVE: local production, local consumption

BRAND DISPLAY:
 LOCAL intentional
 NON-LOCAL unintentional

Chapter 4 | National Case Studies

Introduction

To gain a more complete understanding of the possibilities for a regional place-based food brand, we have also undertaken a cursory scan of existing initiatives across the U.S. While the case studies of Appalachian brands provide an in-depth characterization of brand management and strategy, the food branding cases in this chapter are meant to provide a less detailed review of existing models and best practices on a broader national level.

While examining these four non-Appalachian cases, the most significant finding to emerge was that there was a general lack of existing place-based food brands that include a variety of products and are non-profit run. Place-based branding is a burgeoning research field, and many federal, state, and local government agencies have supported exploratory initiatives around place-based brands. However, the existing literature and field examples around place-based branding is dominated by the tourism industry, as the concept of place-based branding is primarily understood as marketing a destination for tourists or businesses. This is evident from a superficial branding level, such as the existence of state and municipality slogans, to the deeper involvement of visitors bureaus and tourism boards in marketing their area as a destination. While place-based branding for agri- and eco-tourism is interesting to CAN, it is not the focus of this research and for that reason will remain on the periphery.

While there are some initiatives that cross over into the

world of food branding and marketing, they are largely government-supported single-state initiatives. Therefore, given the lack of an appropriately comprehensive model to guide a possible Appalachian food brand, our national cases have been selected to provide a broad representation of branding possibilities. These cases represent variability in the following categories:

1. Funding source: State-funded, non-profit, private
2. Product: Single product, multi-product, multi-industry
3. Geographic scale: County, local, state, national

For each of the following four cases, we provide an overview of the branding initiative, characterize its structure and core strategies, and highlight relevant lessons for an Appalachian regional food brand.

Case #1: Vermont Food Products

Snapshot:

- Funding Source: State-funded government initiative
- Product: Multi-product
- Geographic Scale: State-wide

Vermont is a state with a highly marketable image, both as a destination and as a source of quality products. Vermont is associated with nationally-prized premium food products like maple syrup, ice cream, cheese, and butter. The state's Agency of Agriculture has taken an active role in defining and promoting these well-recognized industries.

Summary of National Place-Based Brand Characteristics

| Brand/Case | Vermont Food Products | Florida Citrus | Napa Valley | Buy Fresh Buy Local |
|----------------------------------|--|--|--|--|
| Funding Source | State-funded, various government initiatives | State agency funded by industry tax | Non-profit tourism and trade associations | Non-profit-based network of chapters |
| Product | Multiple food products | Single product (citrus) | Multiple industries (wine and tourism) | Multiple food products |
| Geographic scale | State-wide | State-wide | County | Various: state, county, municipality, metropolitan area |
| Core strategies | Sector-based promotion, exploration of an umbrella "Made in Vermont" brand | Marketing, advocacy, information and research to support citrus industry | Promote Napa Valley as a tourism destination and wine region | Provide branding materials to support consumer education and local foods promotion |
| Lessons for an Appalachian Brand | Importance of a place's popular image; challenge of maintaining brand requirements | Combination of marketing, advocacy, and informational resources; Governance by industry representatives ensures responsiveness | Emphasis on the place of origin; combining tourism and product promotion | Universal recognition and adaptability of branding materials; Opportunity to represent Appalachian qualities in adaptable umbrella brand |

Overview

The Vermont Agency of Agriculture, Food, and Markets (VAAFM) has made several attempts at an overarching place-based brand. According to a state-funded Farm to Plate Strategic Plan, "The VAAFM operated a "Seal of Quality" program from 1982 until it was discontinued in March 2010 'due to the lack of industry quality standards and the lack of staffing and funding resources at' the VAAFM. The VAAFM also operated a Buy Local campaign, and the marketing materials are still available on their website, even though this campaign has also been discontinued (Vermont Farm to Plate Strategic Plan 44)."

These initiatives offered marketing materials and a well-recognized logo to producers who sourced ingredients or manufactured products within Vermont, in addition to hosting a database of Vermont producers and where to buy their products. The fact that both programs have been discontinued, due to inability to enforce brand membership requirements and fluctuations in state agency funding, indicates that capacity, funding, and enforcement are major challenges even for a state-supported branding initiative.

Current Structure and Strategy

At present, established food branding efforts in Vermont are largely industry-specific, as in the case of *Vermont Dairy*, a marketing tool managed by the VAAFM. Their website offers access to information about the

dairy industry, profiles of dairy farmers, nutritional information, and a database of where to buy dairy products (Vermont Dairy). Despite this marketing effort, most of Vermont's dairy products are processed and distributed out-of-state, and are not branded with Vermont labels. The *Vermont Maple Sugar Makers Association*, on the other hand, offers a coherent brand that dominates the U.S. market. This market domination by Vermont's Maple brand, while due partly to climate and geographical factors, is also built on a strong branding appeal to popular conceptions of Vermont's idyllic maple farms. The dearth of research on this topic makes further comparisons difficult, but it seems that niche products are more likely to attain wide place-based branding recognition, while products that are produced in a variety of regions require more effort to establish place-based brand recognition.

With regard to an umbrella place-based brand, a new "Made in Vermont" branding program is being developed by several state agencies to promote food products, wood products, and crafts. "The *Made in Vermont* brand will be a self-certification (businesses decide if they are eligible) program that requires that facilities be located in Vermont and meet the 'Vermont Origin Rule' (Vermont Farm to Plate Strategic Plan 45), which requires that 75% of a Vermont product be sourced from within the state."

Separate research on forest products in Vermont and the Northeast found that a state-of-origin label was more than twice as important to consumers as other labels

such as “locally made” (Packer). The report also found that knowledge of the region of origin greatly increased the consumer’s valuation of its products.

Research on public perceptions found that the most valued attribute of the Vermont “brand”, meaning its place-based marketability, is its “working landscape,” the idyllic blend of small farms, pasture, and forests. Sector-specific food brands clearly draw on this popular image, yet there is currently little existing research on the connection between the overall Vermont brand and the marketing of Vermont food products. As the report notes, however, “Conventional wisdom suggests that the Vermont brand and the branding of Vermont food products are mutually reinforcing: Vermont’s wholesome reputation enhances the value of Vermont food products, and the quality of Vermont food products enhance Vermont’s reputation (Vermont Farm to Plate Strategic Plan 46).” Despite the richness of the Vermont brand and the cohesiveness of its food industries, the state is still several steps away from a functioning place-based food umbrella brand.

Lessons for an Appalachian Brand

On one hand, Vermont offers a cautionary tale for any effort to develop an umbrella-like food brand. Even with government funding and staffing, two branding initiatives have lacked the capacity to enforce brand standards. On the other hand, Vermont has sustained a prominent origin-based marketing campaign around several different product types. This more piecemeal approach could work for Appalachian food sectors such as grass-fed meat and poultry, heirloom vegetables, and dairy.

Also relevant to an Appalachian brand is the importance of cultivating a common public conception of a region’s landscape. Vermont’s so-called “working landscape” is attractive to consumers who have never been there, as well as to local residents and visitors. Appalachia’s obvious natural beauty, as well as the idyllic character of many of its traditionally agricultural communities, provides a similar foundation for a place-based brand.

Finally, the scale of the region is important. Vermont has a cohesive, fairly homogenous landscape and economy, which may translate into a more effective place-based brand. Research on wood products found that a Vermont-based brand added significantly more product value for the consumer than a regional (multi-state) brand. While this was true in the Northeast, Central Appalachia may be different due to its fairly cohesive identity across numerous states.

Case # 2: Florida Citrus

Snapshot

- Funding Source: State-funded through special tax
- Product: Single product (Citrus)
- Geographic Scale: State-wide (Florida)

Florida Citrus, which is primarily a vehicle for promoting Florida oranges and orange juice, offers an interesting product-specific place-based brand.

Overview

Florida Citrus is managed by the Florida Department of Citrus (FDOC), which is “an executive agency of the Florida government charged with the marketing, research and regulation of the Florida citrus industry. Its mission is to maximize demand for Florida citrus products in order to ensure the sustainability and economic well-being of the Florida citrus grower, the citrus industry and the State of Florida (Florida Citrus).” The FDOC’s role is primarily marketing, although it is also involved in regulation and research for the state’s citrus industry.

Current Structure and Strategy

Interestingly, the FDOC’s operations are funded by a direct tax on citrus growers that sell into commercial channels. While it is a state agency, therefore, its funding is dependent on the successful sale of the product it supports. The FDOC is governed by a board composed of producers, packers, and processors who are all appointed by the Governor.

FDOC’s role in branding is interesting, given that it represents a large and very well-established industry. Most of the industry is concentrated in large companies that manage their own highly-effective marketing campaigns. Brands such as *Tropicana*, *Florida’s Natural*, and *Simply Orange* are well-known and widely-distributed brands.

The role of the FDOC, complimentary to individual companies’ brands, seems to primarily be to provide a third-party approach of citrus advocacy and education. They offer recipes, health benefits, and nutritional information to the general public, as well as resources for health professionals, the foodservice industry, and schools. The FDOC seems designed to provide a user-friendly, informational resource hub that serves as the public face of a major industry.

The FDOC also plays a regulatory role, covering every aspect of citrus production, from fertilization to labeling.

Finally, the FDOC offers resources for producers and others in the industry, particularly in the areas of agricultural best practices, market research, nutritional information, and scientific research.

Lessons for an Appalachian Brand

On the surface, Florida oranges and Appalachian food products have little in common. A similar level of sustained government support in Appalachia is unlikely. Also, no Appalachian food industry aspires to the market saturation and brand prominence of *Florida Citrus*. As with *Vermont Maple*, citrus is a product that is geographically and climatologically specific to a place, thus facilitating the branding of that place as *the* source for a quality product. While Appalachia can potentially produce and market a wide variety of food products, they are unlikely to occupy such a marketing niche since most products (grass-fed beef, dairy, heirloom vegetables, organic produce) are found in other regions. As these differences suggest, comparisons between Appalachian food products and *Florida Citrus* are limited.

The *Florida Citrus* brand does, however, offer some interesting reflection with regard to structure and management of a brand. Having a board of directors that represents the various actors in the value chain seems to be a good management model. Also, funding the brand management through a tax on sales offers an innovative means to motivate effective marketing.

Perhaps most relevant to an Appalachian brand is the combination of branding with advocacy and education. Given that advancing the local food economy is a central focus of CAN's work for a more sustainable Appalachian economy, it makes a great deal of sense to connect a regional brand with a campaign to both increase consumer awareness of the benefits of local food, and build government and private sector support for the local food economy. Also, having such a hybrid initiative somehow connected to a government body, such as the Appalachian Regional Commission or a coalition of state agencies, would lend it greater authority and sustainability.

Case #3: NAPA Valley

Snapshot

- Funding Source: Two non-profits funded through special taxes and membership dues
- Product: Multiple industries (wine, tourism)
- Geographic Scale: County-wide (Napa County)

The name "Napa Valley" immediately conjures images of fine wine, leisure, and Mediterranean climate and geography. As its saturation of the public consciousness shows, the branding of this region has created a highly successful value-add for products from the region. The brand is part organic, emerging as an element of popular culture, and part orchestrated.

Overview

Two marketing organizations overlap in their promotion of Napa Valley as a destination and as a product place of origin. *Visit Napa Valley* is the official marketing organization of the Napa Valley, and is focused on promoting tourism to the region and supporting hostelry businesses. *Napa Valley Vintners* is the trade association responsible for promoting the region's wine brand.

Current Structure and Strategy

Both organizations are non-profits, funded by the industries they represent. They overlap in their promotional roles, but are not officially connected. *Visit Napa Valley* is funded by a special tax on lodging businesses, which essentially makes all hostelry businesses stakeholders and clients of *Visit Napa Valley's* marketing initiatives. Their mission for Napa Valley is to "promote, protect and enhance its position as America's premier wine, food, arts and wellness capital (*Visit Napa Valley*)." Their strategy to do so is through targeted marketing campaigns to increase tourism, as well as providing resources and information for visitors to the area.

Napa Valley Vintners is funded by sponsors and by membership dues, and represents over 300 distinct wineries (*Visit Napa Valley*). They advocate for, provide information on, and otherwise promote the brand of Napa Valley wines. Some of their efforts are directed towards consumer education and networking with other wine-producing areas, while others take the Napa brand on the road to promote it in the U.S. and abroad.

Both groups have the benefit of building on a long-standing public awareness of the Napa region and wines, dating back nearly 50 years to the first major winery opening. Each group responds to the recognized need for

centralized and strategic management of their respective industries, in order to protect and promote the Napa Valley's reputation. This institutionalized management of the place's brand (in both viticulture and tourism) seems to recognize and respond to the potential challenges of fragmented, or competitive, branding initiatives, as well as a response to the risk of deceptive labeling or marketing.

Lessons for an Appalachian Brand

While Central Appalachia is still early in its evolution as a branded destination and food source, it can learn from the history and current approach of the Napa Valley place-brand. Similar to *Florida Citrus*, a hybrid public-private funding structure of either industry taxation or membership fees seems to guarantee responsiveness from the marketing vehicles. Also, the combination of consumer education with information, resources, and promotion of the brand's qualities is a robust approach that could fit a regional food brand.

Perhaps the Napa Valley brand's most important contribution is the growing awareness of the benefit of explicitly tying a product to a concrete place. "The more specific, the better," is the lesson of numerous studies on wine labeling; consumers appreciate a detailed description, and/or image, of their wine's place of origin. As an article in the *Journal of Product and Brand Management* concludes, place-based branding "may be superior to other types of marketing strategies for certain types of agricultural products [...] With the growing trend toward the production of 'place-based' agricultural products, the traditional valuation methods omit an important variable – the potential for the geographical source to help develop a product's brand equity (Thode and Maskulka 379-399)."

Especially when moving beyond the production region, the lesson is that increasing the emphasis on the place of origin –its geography, culture, and climate- can be at least as valuable as describing the product itself. This is an important lesson for Central Appalachia, and it would allow similar products to avoid competing in their branding by sharing the primary brand element of place of origin.

Case #4: Buy Fresh Buy Local

Snapshot

- Funding Source: Non-profit
- Product: Multiple food products
- Geographic Scale: National network of chapters (municipal, regional, state)

Overview

Buy Fresh Buy Local (BFBL) is a well-established umbrella brand that is used across the country. *BFBL* chapters, which vary widely in scale and resources, make use of common imagery, logos, and other brand materials. *BFBL* is an initiative of the non-profit organization FoodRoutes, based in Pennsylvania, which "provides communications tools, organizing support, and marketing resources to grassroots chapters (Buy Fresh Buy Local)."

Current Structure and Strategy

BFBL functions as a loose network of state and municipal chapters connected by a non-profit hub. Chapters are organized under existing non-profit organizations or under newly formed steering committees when appropriate. Membership benefits include planning and development support, though the main component of the *BFBL* network is its shared set of branding materials, from logos and labels to brochure and advertising templates. The *Buy Fresh Buy Local* logo is adapted to include the name of the state, municipality, or area of the chapter that uses it, but is otherwise a uniform and easily recognizable image across the national network of chapters.

Chapters are based in small towns, counties, large metropolitan areas, and states, and vary a great deal in their use of the *BFBL* affiliation. One example, *Buy Fresh Buy Local Nebraska*, uses the common logos to designate "Members," "Sponsors," and "Friends," for entities such as farmers, restaurants, groceries, and farmer's markets. They include members in an extensive local food guide, as well as promoting their products through educational events, providing information for consumers, and supporting producers. In this case, the *BFBL* chapter is hosted by the University of Nebraska-Lincoln Cooperative Extension office, which offers the advantage of institutional stability, funding, and capacity. Another example, *Buy Fresh Buy Local Siouland*, uses the Buy Fresh Buy Local resources and branding materials specifically to promote the Sioux City Farmer's Market. These examples illustrate the variety of this brand's application, in terms of geographical scale, institutional support, and scope of use.

Lessons for an Appalachian Brand

Buy Fresh Buy Local may have the most in common with a potential Appalachian brand: it is non-profit-based, it includes all food products, it provides branding materials to a variety of users, and it emphasizes local production, sustainability, and product quality. At the same time, there is no specific place basis, as the national BFBL hub provides generic materials that must be adapted to each chapter location. Each chapter is responsible for incorporating its own strategy to emphasize its location, and approaches vary widely depending on the size and characteristics of the chapter area and the capacity of the host organization.

The Buy Fresh Buy Local model's success is due to the universal use of its branding materials, and their adaptability to different contexts. An Appalachian brand would do well to offer standardized logos and promotional materials that are easily recognized and available to a variety of actors in the local food economy, who could choose to use the brand whenever applicable. An Appalachian brand logo would be different from BFBL in that it would add the value of representing the qualities of a specific region, rather than being designed for generic national use.

Chapter 5 | Conclusions + Recommendations

This study has so far looked at best branding practices via a literature review, the current state of affairs in existing Appalachian brands via personal interviews, and several outside case studies in a cross-comparative analysis. This chapter now draws upon the findings of these prior chapters to summarize conclusions and recommendations for CAN with regard to their regional food branding enquiries.

Extractions of Some Collective Knowledge

These findings emerged as lessons learned by several interviewed brands. As such, they are identified here as Central Appalachians' collective knowledge about branding local food products in this region.

Farmers/Businesses Choose How to Use the Brands Available to Them

The labels of each brand program are essentially tools which are available to the farmers and food entrepreneurs to use as they prefer. As long as the farmer or entrepreneur is not in violation of the brand's rules and regulations, he or she may elect to engage with whichever and however many brands he or she chooses. It is very plausible for a farmer or entrepreneur to choose two brands under which to label their produce, either for different markets or to co-brand their product in the same markets. Some entrepreneurs are known to participate in both Food We Love and the 30 Mile Meal brand in Athens Ohio. Similarly, a single farmer could sell their produce under both the Appalachian Grown and Appalachian Harvest label if it abides by both criteria. The farmer and the entrepreneur know their business

the best and may use a strategy of several brands if it promises greater profit. These brand affiliations are likely dictated by the market destination and who the intended consumer is.

Reducing Overlap Between Brands Could Avoid Confusion Among Consumers

The interest in reducing the number of overlapping brands pertains more to market share than to geography. At the same time, in the case of local food economies, geography plays a major role in defining the market. In either event, the region will profit from reducing the number of brands that are selling the same product to the same market. While this may seem logical, it addresses the overlaps that occur due to limited capacity and vision among existing brands that operate in close proximity. Appalachian Grown's geography envelopes at least three small independently operating county brands in Southern Appalachia. Co-branding between some of the smaller and less defined county-driven food initiatives would benefit everyone, by creating clearer messaging to the consumers rather than inundating them with too many variations of the same thing. Stronger differentiation between markets, or closer collaboration of initiatives, will also benefit the grant-makers who typically fund these programs. Some grant administrators have even urged Appalachian Grown to coordination between themselves and the smaller county brands located within their region. Clarity to external stakeholders is the goal here, as exemplified by the cases of Napa Valley Wine and Florida Citrus in their unified messaging to the outside world.

Farmers/Entrepreneurs Innovate, While Consumers Push the Demand

Innovation is driven by the farmers and food entrepreneurs (handlers, processors, etc.) who devise optimum business strategies to best meet the identified

demand. Demand comes from the consumers. The brand organization's role is more facilitative, enabling consumers to meet their demands, and farms and businesses to expand and innovate. The brand strategy, meanwhile, is meant to equip value chain actors with the tools they need to educate consumers, and to connect all the parts in the value chain. ACEnet provides a flexible kitchen space for their entrepreneurs to utilize as each of their innovative products demand. ASAP relies on the feedback of their farmers to know which direction the Appalachian Grown brand should be pushed. Some farmers were interested to co-brand their honey with Appalachian Grown, so ASAP made a co-branded label specifically for local honey. They are now experiencing a similar interest from apple farmers and may develop another co-branding label for apples. At the onset of a food branding program, the managing organization is responsible for establishing the brand, but only if producers have expressed a willingness to participate, and consumers have expressed demand for the product being branded.

Summary of Strengths and Challenges of the Study Region

This section discusses some of the existing strengths and challenges specific to local food branding in the region.

Strengths

- Existing Brands Function on an Appropriate Geographic Scale** This study revealed that existing brands in Appalachia and their correlating territories are, in general, appropriately scaled both geographically and operationally. The existing brands range from a small 30-mile radius to a larger 60-county region, but they each function according to both the objectives they establish and to the target consumer base. The major influence in the scale of the production region is the capacity of the managing organization. However, this too is indicative of an appropriate scale for those local food economies. As experts in their local culture, politics, and geography, the organizations that develop and manage each local food brand have a well-founded understanding of what brand scale their region can support. Due to CAN's region-wide scope of influence, the scale of any involvement in branding would be less constrained by geography than by operations capacity.
- More Demand Still Exists** There is clear existing demand for more local food supply in the study region. Several recent reports¹ and ancillary

evidence support this point. At the time of this study, at least four local food brands in the study region were in development (30 Mile Meal affiliates in Youngstown, Licking County, and Huntington; and Greenbrier Valley Local Food) and several county programs were in operation. In NC, for example, there is High County Grown, Yancey Grown, and Haywood County Initiative, and several more anecdotal requests to become involved in the surveyed programs were noted. Within the first year of operation, the 30MM Athens program was overwhelmed with interest from outside communities wanting to create their own program. ASAP has been approached by farmers who want to be involved in the Appalachian Grown brand but lie just on the outside of their boundary. A more comprehensive study should be conducted to expose the degree of market demand more concretely; however, interviewing and research have indicated that a sizable interest for local food economies remains untapped in the study region.

- Appalachian Culture is Conducive to the Local Food Movement** The history and culture of Appalachia seem more conducive to spurring local food economies than one might expect. Contrary to the presumed negative implications of being a relatively isolated, rural, independent culture (which many aforementioned stereotypes have been based upon), the history of homesteaders and self-sustaining livelihoods seems to be advantageous for inhabitants of the study region to be in support of a local food economy. Supporting local food brands seems to adhere to the unifying values that broadly apply to Appalachia: cultural pride and heritage; loyalty to local businesses; interest in protecting farmland; and economic self-sufficiency.

This is a promising moment for the local food movement in Appalachia. Now is the time to recognize future potential and establish a strong branding strategy to capture, direct, and manage the future proliferation of local food products, endeavors, and programs. Rural landscapes are less tested with local food economies, but their vast scales and dispersed population suggest that a regional approach that is large enough to capture the whole picture of many moving parts in this expansive region is best designed to bring the current disparate brand networks to scale.

West Virginia Farm and Food Coalition, <http://www.wvhub.org/wvffc/news/wvffc-sponsored-study-shows-economic-potential-produce-farming> ; Appalachian Regional Commission, Assessing the Landscape of Local Food in Appalachia: Executive Summary; CAN, Opportunities for Land-Based Economic Development in Central Appalachia

1 Refer to these reports for further analysis:

Challenges

- Uncoordinated Brand Strategies May Cause Identity Confusion** There have been past incidences of minor confusion between the two brands Appalachian Harvest and Appalachian Grown. These brands have a small overlap in their geographic territories, and are similar in name. While Appalachian Harvest pertains to food which is processed and distributed at a central hub and Appalachian Grown is a label that allows producers to better market themselves, the internal criteria by which these brands are applied to different foods may not be thoroughly known by all retailers and consumers who purchase the branded products. This is not a major cause of distress right now, but this kind of market encroachment can amplify as local food economies proliferate in the future. It is also indicative that other such scenarios likely exist in the study region. To avoid competition between similar products from the same region, existing brands like Napa Valley and Florida Citrus encourage producers and businesses to focus their marketing on the place of origin, rather than trying to distinguish themselves from other products from the same origin. The idea here is that if your place is strongly associated with a quality product, there will be plenty of demand for all of those products from that place and no need for competition.
- Limited Structure Exists for New Branding Growth** Currently, little structure exists for incorporating new sub-brands, products, or brand expansions. New brands and new brand strategies are evolving as they are needed in an ad hoc fashion. Brands are co-branding as the needs come up and targeting certain products as the demand for them emerges. A more intentional strategy, with greater knowledge of neighboring initiatives and more coordination amongst organizations, will prepare a flexible space for co-branding opportunities and variations as they arise. Greater organization will allow for more consistency to appear in the brand logos, which will be more legible to consumers as brands expand and multiply. The importance of this common branding is apparent in the Vermont case, as a strong and attractive regional image is currently used inconsistently across a variety of industries. Without a common brand identity to depend on, individual industries and initiatives will inevitably duplicate each other's efforts, leading to consumer confusion and inefficient use of resources.
- Current Efforts are Primarily Grant Funded** As is typical for many economic development programs, most of the local food programs are grant funded. Instead of being primarily grant-

funded, programs may contemplate how to become grant-*subsidized* by growing a branch of finances that are generated through the trade and commerce of these local products. If the demand is authentic, as it seems to be, then treating the management of these local food branding programs as an earned income strategy may generate authentic profit and increase long-term viability.

The region's greatest challenges are unsurprisingly fueled by its rural isolation and challenging economic environment. Overcoming the fragmentation and disconnect of the region imposed by its rural and isolated landscape can more easily be achieved by instituting a highly organized control center, such as a regional brand organization, that can facilitate communication and resources to smaller dispersed entities. True sustainability can be met when the whole Appalachian local food initiative weans more independence from the government funding and philanthropic sources. Economic development supported by sustained earned income strategies is a challenge and opportunity for local food initiatives in Appalachia.

Recommendations for CAN and Appalachia's Regional Branding of Food Products

What seems clear is that the demand for local food branding in Appalachia will continue to grow and, as this study has found, a regional management approach is needed to fully capitalize on that demand. Various studies have demonstrated that additional demand and greater needs exist for local food economies in Appalachia. Branding food products for designated markets is the central tool to manage and organize a regional strategy here. The future will see more food brands emerging on the market and more complex networks of branding programs in each region. As the popularity of these programs advances, stakeholders and industry players would be wise to harness the opportunities that appear with the growth of the local food systems, and to develop sophisticated mechanisms for collaborating for mutual benefit. The intersection between these points – continued growth of demand, the need for regional oversight, and the transition from individual enterprises to networked collaborations – is the prime position for CAN to fill.

CAN's Questions

This research set out to discover the answers to these three questions posed by CAN at the beginning of this study:

- How can we determine what types of product**

could be covered under a regional brand? How does the diversity of products included impact the success of existing place-based brands?

- **Is there an ideal geographic scale for a regional brand? How is this determined?** At what scale can a food branding program function? Multi-county? State-level? Multi-state? Can a single product carry two levels of branding – local and regional?
- **What aspects of the region could a Central Appalachian brand focus on?** How can CAN introduce their regional component to a successful brand strategy? Which characteristics of the Appalachian region could be incorporated into a regional branding strategy?

The more local a consumer base, the less need for curated image or brand identity. As the food product travels further from the point of origination, the consumer base requires stronger brand strategies to feel connected to the culture and landscape in which that product was raised. The importance of the place of origin's identity grows as the product travels to ever more distant markets. Napa Valley wine and Vermont food products conjure positive responses even for consumers who have never been to these places, due to the attractive associations that have been developed between the originating environment and the quality of the product. Appalachia has many attractive characteristics that, if consistently associated with particular food qualities, can contribute to a strong place-based brand even well beyond the region.

If the mission of the brand is to exclusively serve local consumers, a LOCAL model is most appropriate. However, if the food products will travel beyond the designated local region, a REGIONAL model will be better equipped to manage this system. Both a local brand strategy and a regional brand strategy are designed to keep or return food dollars locally. However, most brand strategies deploy a model that sits on a gradient between these two extremes. Deploying a local strategy versus a regional strategy (and vice versa) does not have to be not a mutually exclusive decision.

Regardless of the intent of the existing brand programs in Appalachia, nearly every brand label seeped beyond the local consumer base and appeared in non-local markets. These experiences show that, in reality, a brand strategy should have components to serve both local and non-local consumers –it should be a hybrid of both a local and regional strategy. Several local food systems rely upon the non-local consumer base to supplement the local demand already. That being said, intensely local programs that will be geographically very small and socially enclosed, like the 30 Mile Meal, have less

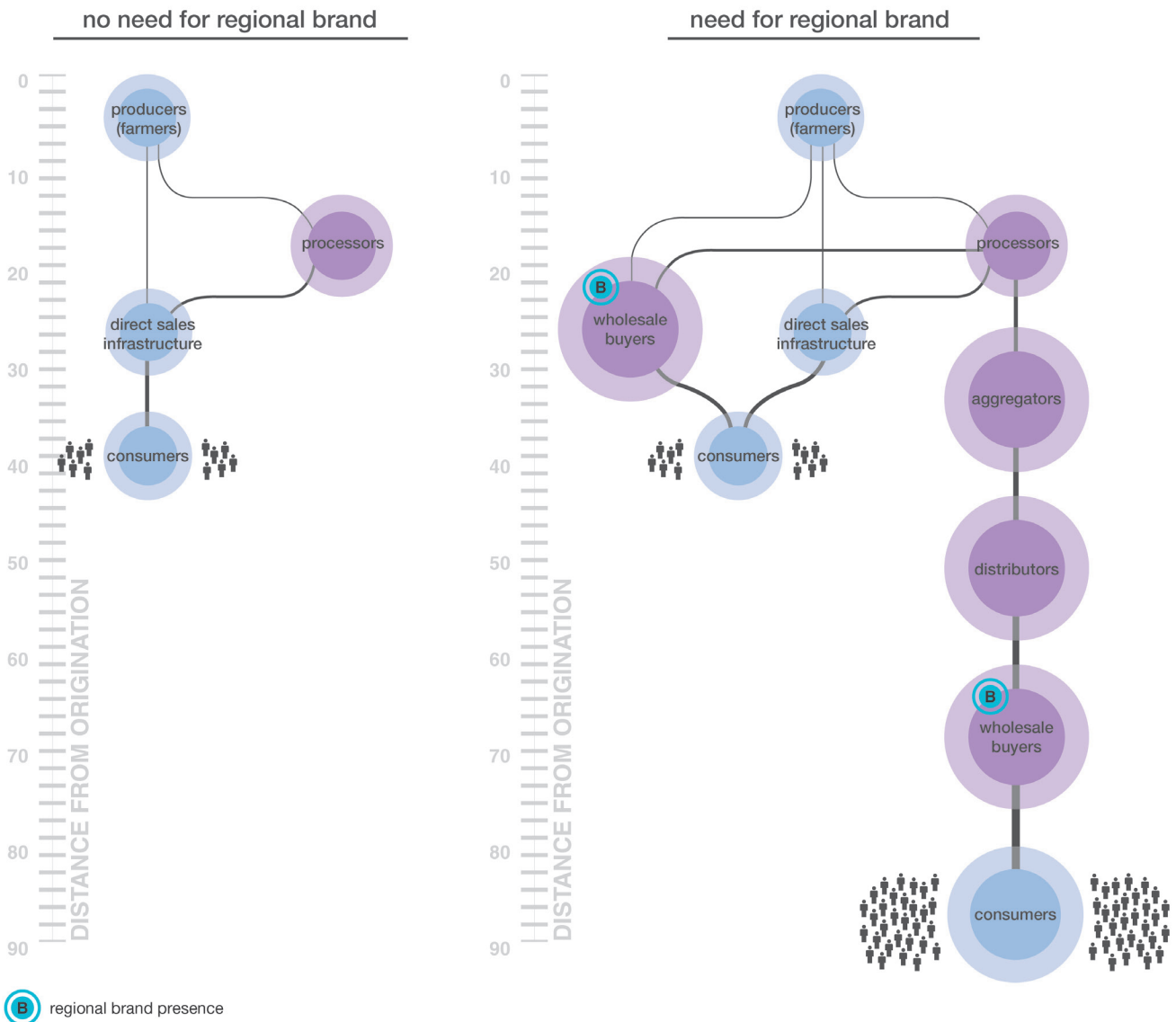
of a need for a regional branding entity. There is no reason that businesses and producers should not be able to layer brands; that is, they can use a county-level or similarly local brand, as well as a regional brand that better identifies their product for non-local markets. The choice of when to use these varying brands, of course, would belong to the producer or business.

The findings to these questions seem to vary a lot depending on whether CAN intends to extend into wholesale networks located inside the Appalachian Region, or outside to non-Appalachian locals. Before launching a brand program in an area, a firm needs to decide who their target consumer is. Local consumers who live in the same geography as the origination of the food need information more-so than aspirational imagery, from a brand to differentiate what food products are local and where they originate. However, as the Vermont case study showed, they greatly value and respond to these positively branded images of their region. Non-local consumers who live outside of the production area but still find value in the source of food products may respond to a strong brand identity – a crafted image of Appalachia that inspires consumer aspirations about the concept of Appalachian food and can more strongly compete with the masses of available food products.

It is important to recognize that values, in addition to quality, are central to a place's contribution to a product's success. The values of family traditions, conservation, and sophistication contribute to the appeal of Napa Valley Wine, while the Vermont products are associated with values like artisanship, self-reliance, and local traditions. Most existing Appalachian local food initiatives, including those supported by CAN, share similar values of environmental conservation, economic self-sufficiency, health and nutrition, community development, and supporting family farms. These are all values which, in conjunction with specific food qualities, can create a strong positive association with Appalachia in consumers' minds.

CAN is best poised to play an overarching facilitative role between the multiple brands in the region, and focus on the branding and labeling of food products that will reach a consumer base locally, proximately, or distantly located who need information and imagery of Appalachian grown foods. The study region has the potential to produce more food than it can consume. As a result, most branding programs will likely have products that reach non-local consumer bases – whether those external markets are intentionally or unintentionally reached. Brand organizations should

CAN



Graphic Created by Lindsay Reul, 2012

recognize this point and proactively design their brand strategy to represent Appalachia and their food product well to outside markets.

How Can We Determine What Types of Product Could Be Covered Under A Regional Brand?

This region is already branding numerous food products, from conventional and organic produce to value-added and specialty items like grass-fed beef and local honey. Food products from Appalachia can be valuable as unique products only found in this region (such as heirloom foods²), as premium products marketed for

2 For more information on Appalachian heirloom and heritage foods, refer to the USDA Sustainable Agriculture Research and Education, <http://www.southernsare.org/Educational-Resources/Project-Products/Southern-SARE-Project-Products/Place-Based->

their high quality, or as products that are valued purely because they were grown just next door in local soil by local people. The food assets that are valuable because they are local are less related to the purposes of a regional food brand, and should remain under local scale management.

Regional brands that assume a larger territory and more distant consumer base are more appropriate when applied to specialty products that are uniquely valuable or uniquely Appalachian. These are food products that are “good” enough for consumers to travel for, or to affix a loyalty to, allowing them to be differentiated in the marketplace. Differentiating the region as a premium source of a product -as with Napa Valley wine, Vermont cheese and maple syrup, and Florida orange juice- creates an automatic quality association for any

[Foods-of-Appalachia](#)

Local Scale Branding :: The local scale is characterized by a program that is predominately oriented to have food consumed where it is produced. These regions tend to have very strict geographic boundaries and do not gain many advantages from expanding their consumer base. The highest value is placed upon the “local” component of the food product, and the brand is therefore not as valuable outside of the designated local region. *Food is valuable because it is local*

product from that region. These specialty products can take the form of virtually anything – raw produce, animal products, processed value-added products, etc. The food entrepreneurs (farmers and food handlers) and perhaps the local food brand organizations would know best which of their products are in highest demand by which markets. Additional research can focus on discovering which CAN and CAN-affiliated products are most appropriate for a regional brand strategy.

Additionally, when branding at this regional level, the messaging deployed with the labels and brand identity should include information about the environment in which the food was raised. In the well-documented case of wine labels, more detailed information about a product’s specific origin correlated with higher value attributed to the product by the consumer. This is important to help differentiate and market the product, but also to educate the distant consumers about the food’s origins. This study shows that using two labels on the same product – the local brand and the informative regional identity – is the most effective way to label products to the widest audience. For example, including information about the Napa Region and the family vineyard is the most effective labeling strategy for Napa wines, while labeling wood products as New England-made and Vermont-made offers the most complete branding method.

How Large of A Region Can Brands Cover?

The lessons derived from the best practices suggest that two simultaneous and overlapping regional scales may be the best approach. Local brands typically have a strong connection to the landscape they represent and craft logos of aspirational images that best reflect their culture. Regional brands may be less of a “brand” and more of an identifier. The marketing portion may be better driven by the strong local brands in each of their territories, and the regional brand may better focus on the internal management structure and point-of-origin education for distant or external consumers. Deploying a regional brand that centers on the structure, design, and management portions of a program and allows local chapters or affiliates to handle marketing and

Regional Scale Branding :: The regional scale is characterized by a larger scope, and usually a larger geography, of branded food products. This scale of branding seeks to differentiate products in the larger market, and requires a higher degree of marketing and labeling to campaign for the food products to a broader consumer base. The highest value is placed upon the uniqueness or high quality component of the food product, and can therefore be distributed to wider consumer bases that may share these values or desire these scarce resources. *Food is valuable because it is uniquely good*

media components means that it can cover enormous territories, similarly to the Buy Fresh Buy Local branding program.

The local food movement is a demand driven enterprise – local food initiatives only develop as needed and should continue to be developed this way. This organic process of evolving local food systems will dictate the ideal local region and set boundaries to define that local scale. This region will likely be a collection of counties that find themselves within proximity to a comparatively strong epicenter. The number of counties can range from as few as two or three up to as many as sixty (again, this advice is given with respect to the scale of counties in Appalachia), but extending the production area beyond this range in either direction is ill advised. Instead of expanding the scale of the geography of the existing brands to meet the increasing demand, additional brand programs should enter the scene.

The overlapping regional scale can incorporate a selection of products, or whole brand labels, from a number of local food brand programs. The geography of a regional brand is clearly larger, encompassing a number of local brand geographies, and functions more as a communicator of the regional assets to broader markets. This region, because it is the second tier of brand identity, can be as large as the entire Appalachian region. The best guidance for defining the scale of the regional brand is to respond to what consumers can recognize. Appalachia is a region that non-locals can understand, but this might be too large for the brand program. CAN might decide what consumers recognize as the next level of sub-region. For example: Appalachian Ohio, Appalachian Virginia, and West Virginia. Again, these options need not be mutually exclusive, and overlapping levels of brands is a viable option for Appalachian food products. Further research should be focused to better understand a functional scale for regional food branding in Appalachia.

What Aspects of the Region Could a Central Appalachian Brand Focus On?

A Central Appalachian brand should focus on facilitating



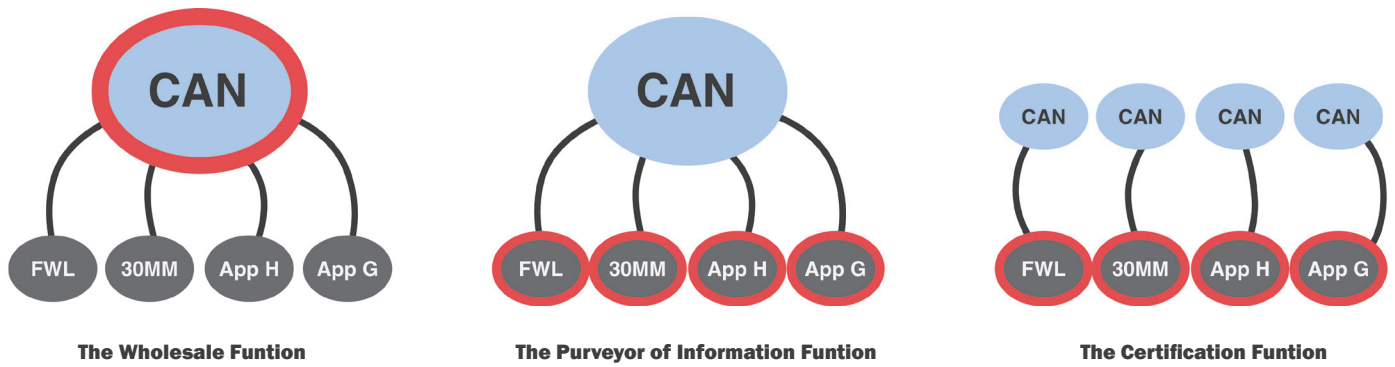
the existing brands of the region, nurturing the interest in emerging brand programs, and creating a supportive environment of resources for the existing and emerging brand programs. A regional entity like CAN can best intervene by forming an overarching organizational structure between sub-brands, growing inter-organizational networks, facilitating logistical coordination and development, and providing broad information about regional-scale markets. These tasks would be very challenging for a single small entity to achieve, and are in line with CAN’s existing roles and activities in the region. Additionally, such network coordination and “big picture” information commonly falls outside of a small entity’s scope of interest. A localized brand organization simply will not have the capacity to achieve these tasks as well as a regional network can.

On the other side of the local food exchange, a Central Appalachian brand should differentiate their unique food qualities in the local, proximate, and distant markets. Knowledge of which specific products are most marketable for non-local markets is embedded in the local brand management teams and needs to be further pursued- this study did not focus on recovering

such information. However, the research’s early findings suggest that the Appalachian heirloom and heritage food products, grass-fed beef, and the sustainable produce grown by small farmers are unique and/or especially high quality food products from this region. A worthwhile future research topic might be to survey consumers about what characteristics they value about Appalachia as a region and about Appalachian foods in particular.

What Role Should CAN Play?

Based on the research conducted and our understanding of the role that CAN plays in the Central Appalachian region, we recommend that CAN serve as an incubator to existing and emerging brands. As the trend for locally produced foods continues, more local food brands will pop up inside of the Central Appalachian region. The more local the brand models, the less reliance they will have on CAN. Replications of the 30 Mile Meal project will easily operate and perpetuate without the guiding auspices of CAN. However, CAN should still be aware of such local models and become an expert on all the brand programs in their region and how they relate to one another. Doing so will permit them to provide support to partners interested in developing brand programs,



identify connections or areas of overlap between brands, and lift up all of the region's brands in the national consciousness through outreach and connections outside the region. CAN's role could involve providing a set of generic branding materials for Appalachian food products, similar to the national Buy Fresh Buy Local model, which would allow for start-up and emerging producers and food entrepreneurs to enter brand-relevant markets despite their limited resources. In this way, CAN should act as an incubator to the existing and emerging local food brands in their region.

Currently, the existing brands have established missions and designed their models in such a way that they cannot use one another's infrastructure. Even similar brands are constructed in ways that cannot leverage each other's laid groundwork. Appalachian Harvest brands some farmers who are local to the same region that Appalachian Grown markets. However, since Appalachian Harvest does not require proof of origination from farmers who process or aggregate produce from other farms, and they include producers in areas of VA outside of ASAP's Asheville-based certification radius, Appalachian Grown cannot simply apply their certification label to Appalachian Harvest farmers. Appalachian Harvest's mission is to aggregate and distribute produce from small local farms. Appalachian Grown's mission is to label local produce and products.

The brands can survive with this independent status quo so long as they do not compete within each other's markets. However, as the number of local food programs grows, and the volume of food products in the marketplace increases, this harmonious system may struggle without more clarity between the different programs. Significant benefits can be extracted now and in the future from a more organized collaboration amongst the existing brands.

Could these brands sell their services or infrastructure access to each other and minimize their costs while

increasing their profits? ASD has large utility trucks and specializes in aggregation. ACEnet has a rentable processing facility and specializes in entrepreneurial economies of scale. As an incubator, CAN could service the Appalachian local food system that is developing and use the resources of these four existing brands to their optimum effect. Ideally, these brands should cooperate with one another – not compete nor operate in isolation.

CAN Brand Models

CAN can serve as an incubator to the region's food brands in a number of ways. Three possibilities have been outlined here:

- 1. The Wholesale Function:** CAN serves as a driving brand house with the existing brands serving as its subsidiaries. In this model design, CAN aggregates the food products from around the region in storage facilities in preparation for wholesale distribution. CAN is responsible for the holding and transporting of the produce. In this model, CAN would assume a large portion of the risk in shipping and handling. This would be a very expensive option for CAN as they would need to invest in significant infrastructure and distribution expertise.
- 2. The Purveyor of Information Function:** CAN serves as a brand house with driving sub-brands. CAN possesses market knowledge and is the purveyor of information to their applicable sub-brands for reaching each of their aspiring markets, similar to the role of Florida Citrus for their state's orange juice producers. In this sense, CAN can facilitate between the sub-brands, devise regional distribution strategies and/or regional brand strategies, develop new regulations and build social networks. This broad and shallow facilitation role is akin to the function of the national Buy Fresh Buy Local hub for its various chapters. or to the Napa Valley brand for individual vintners. This model plans for maximum autonomy for the sub-brands to continue functioning as they prefer, and maximizes CAN's resources. The scan of national best practices suggests that this model is feasible and effective.

3. The Certification Function: CAN serves as a certifying house of brands for the unique and complimentary brands in their region. CAN certifies or endorses the affiliated brands as authentic products of the stated region and held to specific quality standards, similar to the Florida Citrus approach of industry self-regulation. This model would really only pertain to food products that reach proximate and distant markets and functions similarly to the Fair Trade certification. The forthcoming “Made in Vermont” brand will fulfill this function, as it endorses food products that meet established requirements for in-state production. This option presents the challenge of enforcement capacity, but offers the benefit of grouping existing brands without taking on a resource-intensive centralized structure.

This paper recommends that CAN take on the role of the second option and serve the function of the purveyor of information for their region, as well as taking on parts of the third function by endorsing affiliated brands within the region. This model will comprise a true regional-scale branding program in its most authentic definition. CAN would become knowledgeable of the market dynamics to a degree that it could help direct appropriate volumes of food to appropriate locations. They would understand where the availability of distributors exist and what sub-regions are underserved. In other words, CAN would assess and make public the state of the resource environment. Environments rich in resources would have wholesalers, distributors, representatives, and retailers readily accessible. In these environments, farmers need only to plug into them and begin contributing their products to the system. CAN, in this instance, would identify such prime areas for the potential development of a brand. CAN’s most enabling role will be to develop a supportive resource environment that may be lacking in locations where farmers or consumers are demanding local food economies.

Conclusion

The future of the local food movement looks bright in rural Appalachia. CAN has the opportunity to fill a necessary void in the regional movement to brand and market the food assets of the region. As a regional network, CAN is able to provide a function above and beyond what each member organization has to offer. The local food economies supported by CAN’s member organizations have developed within individual micro-geographies, but have many commonalities and connections. CAN is able to bridge these sub-regions and see potential opportunities to connect existing branding efforts and others that are not yet on the map.

Right now CAN functions as a collection of networks – without a centralized hierarchy. This horizontal

structure is successful in maintaining a strong network amongst parties, but in order to reach the next level of sophistication in the regional branding effort, CAN may need to develop an internal entity that can enact strong and efficient decisions around food branding. Both components – a strong and far-reaching diplomatic network and an efficient authority to execute fast turn-arounds and consistent management – are needed to develop an organized region-wide brand that ardently responds to the changing demands of the food industry marketplace.

Developing a local food economy as a mechanism for rural economic development is a relatively unexplored field at the regional scale. However, the timing appears ripe for new and exploratory ventures such as launching a regional place-based branding program. The demand is present, the resources are available, and with the strong voice of an organized managing team, place-based food branding can help Central Appalachia continue to grow its wealth-generating local food economy.

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- MACED: www.maced.org
- NCIF: www.ncifund.org
- Rural Action: www.ruralaction.org

