2016 Local Foods Resource Mapping Focus Group Project

North Carolina

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This report summarizes the responses given by participants in five focus groups held across the state of North Carolina in late summer/early fall 2016. The purpose of the focus groups was to identify the effectiveness of the current local food system infrastructure, as well as gather feedback on how to provide useful data to food system stakeholders through an online mapping interface.

Background Information

- USDA's Agricultural Marketing Service (AMS) is seeking to develop a web-enabled public directory and map to provide a comprehensive picture of the local food system. Six states were selected to be part of the project (Alaska, Arkansas, Arizona, Kentucky, Mississippi, and North Carolina). The main goal of the 2016 LFRM Focus Group Project was to equip both novices in farming and local food marketing and experienced farmers who seek to diversify their crops and marketing options with the tools they need to more easily navigate the maze of existing information and resources as well as find the practical information they need to move ahead effectively in developing a sound business and marketing plan.

- Output of the LFRM Focus Group project is:

> "To provide user friendly data resources needed to guide investments that can strengthen a regional food system, including the types and levels of information emerging food system entrepreneurs will need to objectively identify the assets and challenges of a proposed food-related venture, the resources needed to launch such venture, and the likelihood of its long-term success."

- By identifying opportunities to fill gaps in infrastructure and solve related barriers, the information gathered through the LFRM Focus Group process can be used for purposes of:
  - Market research
  - Economic and business development
  - Creating linkages between businesses
  - Policy development
  - Curriculum development

  Potential food businesses, no matter where they fall in the local food system (production, processing, distribution, consumption, waste), as well as those who provide institutional support, will benefit from the LFRM Focus Group Project. Entrepreneurs and technical assistance providers who assess the viability of a proposed food venture or help design the business plan for such venture, as well as investors and lenders to the proposed venture, may also find the data useful.

Focus Group Process (NCSU IRB 9091)

NC State University LFRM Study Team

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Recruitment and Makeup of LFRM Focus Group Participants

Introduction to Regions:

Each LFRM Focus Group Process was conducted over a three hour period held through the lunch hour from 11 am to 2 pm. The focus group participants were identified by NC Cooperative Extension and coordinated through active regional food councils or economic development offices in five regions throughout the state. The following table provides details on each of the five focus groups.

NAME OF NC REGION	INVITED COUNTIES	NUMBER and ROLE of PARTICIPANTS	LOCATION	DATE
Sandhills Metro areas: Fayetteville (with close proximity to Triangle metro areas)	Lee, Moore, Richmond, Scotland, Hoke, Cumberland, Harnett, Robeson, Montgomery	14 – producers, food pantry, educator, distributors, health department, economic developer, Extension, farmers market	Richmond County Extension	August 31, 2016
Southeast Metro areas: Greenville, Jacksonville, Wilmington	Pitt, Craven, Carteret, Onslow, Pender, New Hanover, Brunswick, Columbus, Bladen, Duplin, Lenoir, Jones, Wayne, Greene, Sampson	8 – producers, food corps member, distributor, local foods agent, local government	UNC Wilmington	September 7, 2016
Foothills Metro areas: Charlotte, Asheville, Greenville (SC)	McDowell, Rutherford, Cleveland, Polk, Henderson, Buncombe, Haywood, Jackson, Catawba, Burke, Madison, Yancey, Lincoln, Cabarrus, Stanly, Anson, Union	16 – producers, economic developers, food entrepreneur, Extension, Americorps, farmers market, health department, local food agent,	Polk County Extension	September 11, 2016
Triangle Metro areas: Raleigh, Durham	Wake, Franklin, Warren, Vance, Granville, Durham, Person, Orange, Chatham, Nash, Halifax, Edgecombe, Wilson, Johnston	15 – producers, distributors, economic developers, processors, Extension, educator	Franklin County Extension	September 14, 2016
Piedmont Triad Metro areas: Greensboro, Winston-Salem, High Point	Alamance, Caswell, Davidson, Davie, Guilford, Randolph, Rockingham, Stokes, Surry, Yadkin, Forsyth	7 – producer, food council, Extension, farm to table chef, food hub	Forsyth County Extension	September 19, 2016

Many of the counties included in the LFRM Focus Group regions have participated in USDA-Rural Development's Stronger Economies Together (SET) planning initiative.

Focus Group Session Makeup:

Suggested focus group participants included at least **2-3 producers** (growers of perishable locally grown foods, horticulture, meat and dairy), and **1 representative** from each of the following components of the regional food system:

- Buyers – for profit (representing direct, intermediated, and institutional markets, including independent/small regional chains and large grocery chains, independent and chain restaurants)
- Buyers – not for profit (including public school food service, public and private university food service, hospital/health care)
- Technical assistance providers (CFSA, RAFI, CCE, CEFS, UNC School of Government, ECU, NC A&T SU, Warren Wilson College)
- "Systems people" (regional economic developers)
- Transporters/Distributors/Warehousing/Cold Storage (including food hubs, co-packers)
- Processors/Value-added Producers (focus on perishable items)
- Actors or Individuals/Businesses involved in infrastructure development, marketing, branding
- Food Waste Enterprises

Every effort was made to include representation from historically marginalized communities, as well as rural counties, in the Focus Groups. Primarily rural interests were represented in the Sandhills and Foothills focus groups, while the majority of food system stakeholders in the Southeast, Triangle, and Piedmont Triad focus groups were from urban communities.

Participation was by invitation extended through County Extension to selected individuals at least one month before the scheduled date of the Focus Group. Participants signed ***a consent form prepared by the LFRM team*** (which included permission to record their responses during the Focus Group session). All participants were told that they will receive a copy of the final report generated by the NC LFRM team, including a packet of information containing excerpts/lists of currently available local food resources/data sources (e.g., NASS/state statistics pertaining to direct and local, include reliance on direct marketing/CSA use by different sized farms, changes in number of direct marketing outlets, breakdown of primary ag production in the state (or region), and noting any significant changes.

Compensation for participants:

Participants' travel to attend a LFRM regional Focus Group was reimbursed at the federal rate for roundtrip mileage in excess of thirty miles.

Outcomes:

The outcome of the LFRM Focus Groups will be a narrative report that identifies:

1. The perceived gaps in North Carolina's emerging local food system in each Focus Group region.
2. The awareness of and perceived value of existing resources in the local food system in each Focus Group region.

Focus Group Participants who wished to become engaged in strategy implementation surrounding entrepreneurial and small business opportunities within the regional food system will be invited by a "host" regional food council or economic development authority to participate in meetings and other work activities dedicated to that purpose. This will ensure continued engagement in local food system development by interested participants.

Executive Summary

This section of the report will provide a brief summary of perceptions surrounding North Carolina "local" food systems. More detail from each of the five regions to each of the ten focus group questions follows this summary.

1. Each of the five focus groups opened with the icebreaker question of what "local" food means in the region. While the responses from each focus group region differed slightly, there was general consensus among the regions about how important the interpersonal relationship between the consumer and the farmer is, in particular, the small scale farmer who allegedly engages in more environmentally "safe" practices. The definition of "local" includes farms within a 50-150 mile radius and may also cross state lines, depending on the region. For example, if the region borders South Carolina, "local" peaches includes peaches grown in South Carolina, but not Georgia. But, in the case of specialty food products, like seafood, what is "local" is defined by state boundaries. Respondents also exhibited lack of trust in grocery stores who market so-called local food, calling for more honesty and transparency at the supermarket level. Finally, respondents expressed concern that consumers are unaware of the seasonality of fruits and vegetables in their region.

"The relationship with the farmer matters, because people trust farmers they know."

2. The second question asked whether demand for local foods is growing in the region. Across the state there is a perceived rise in institutional demand – from schools, hospitals, and restaurants – as well as from the higher income consumer demographic. However, it is also clear that while demand for local food may be rising in urban areas, it is not as evident in rural areas. Focus group participants also stressed the need for consumer education on the health and economic benefit of buying food locally and were aware of inefficiencies and lack of infrastructure for small scale farmers to sell to both institutional buyers and to distributors. Consequently, suggestions for aggregation models (food hubs and cooperatives) were offered as a means to address the need for buyer convenience.

"Local foods is an urban phenomenon; there's no premium in rural areas because people have been getting it off the truck for generations."

3. When asked if local food is more expensive than non-local food, responses were mixed. Prices for local food in cities are generally greater than in rural small towns. Local meat is generally more expensive, but at underperforming farmers markets, growers may be underselling fruits and vegetables just to get rid of their product at the end of the day. And "local food" at Walmart is typically priced at or below local food sold at farmers markets.

> ***"The cost of local food is more, because there is not scale. Buy a pallet at one price; buy a truckload at a cheaper price. The entire US food system is built around truck loads and rail cars."***

4. Question four asked focus group participants to identify sources of information when making business decisions for their local food enterprise. A variety of information sources educate the local food business owner, including personal experience, the internet (for census and federal and state data), customer surveys, social media, and word of mouth. Extension, NC Growing Together, USDA's Agricultural Marketing Service, and the NC Department of Agriculture and Consumer Services were also cited as good informational resources when planning a local food business. In some cases, for example a project to start a food hub, professional consultants are hired to gather needed evidence of demand, in order to determine the feasibility of such a project.

5. When asked what particular resources the region needed to strengthen the local food system, there was a laundry list of needs, including government incentives and use of public lands, consumer trainings, new farmer trainings, cooperative formations for aggregation and distribution, access to affordable land, better distribution logistics and value-added infrastructure. Interestingly, one region spent a considerable amount of time discussing the role of distributors and the need for them to communicate and cooperate with one another in order to fill gaps in distribution. The distributors suggested that growers not depend on a single distributor, but plan to work with several. In another region, a suggestion was made to shift the focus away from consumer trainings in food insecure communities to increasing the investment in these communities to local food-related enterprises development. This question also shed light on the availability of underused assets in the region, like cold storage. Even though a feasibility study had been conducted indicating the need for cold storage in the region, when it became available, growers did not take advantage of it.

> ***"We need to shift patterns of investment - not just putting the onus on low wealth communities to attend classes. We should invest in small food-related businesses in low wealth communities by creating revolving loans, etc. to support the development of that infrastructure."***

6. Distribution of local food, whether directly or through a wholesaler, is borne mostly by the growers in North Carolina. Focus group participants believed that farmers, especially hobby farmers, preferred self-sufficiency and being in control of their product from field to market. This preference leads to inefficiencies, as one farmer, hauling a half-truckload of product, may drive past a neighbor's field of the same product, with no offer to deliver product for the neighbor. The cost of time and gas to deliver the product is not being factored into the business operations of either farmer, and should be, according to the focus groups. The lack of distribution infrastructure is therefore yet another reason for farmers to learn to cooperate, collaborate, and aggregate. Focus group participants also stressed the need for detail on existing distribution routes and food hub requirements and in those regions fortunate enough to have a food hub, expressed their immense gratitude for the work of the food hub in their region (ASAP and Feast Down East).

> ***"A map that shows the location of distributors and whether they work with small farmers would be helpful, but knowing where their routes are is more important."***

7. All regions initially responded that there was not enough cold storage available for small scale farmers in the region (except as described in paragraph 5 above regarding underutilized assets). Growers selling at farmers markets generally make do with small freezers and refrigerators they personally haul on trailers, but storage for further distribution is not generally available. The cold storage that typically exists in the region is privately-owned, and any research on cold and cool storage has apparently not been widely enough disseminated. Participants wanted more detail on available cold storage, so that growers can determine which storage facility is best suited for their food product temperature requirements. Location of cold and cool storage is also critical to its usefulness. Distributors want it along their distribution routes, while farmers need it closer to their farms to ensure freshness.

8. The need for processing and packaging facilities for small scale producers was expressed in all 5 focus groups. Incubator kitchens were high on the list, as well as mobile meat processors. In addition, participants suggested that trainings on the benefit of value-added processing would influence growers to consider washing, cutting, freezing or other processing, as well as packaging and portion sizing as part of their operations.

> ***"Do first stage processing in rural areas, but canning and bottling in the urban areas where the distributors are. Waste needs to stay where the production is."***

9. Participants were asked how online "maps," showing the locations of food system stakeholders (small scale producers, organic farms, processors, distributors, storage, markets, etc.) might help in planning their local food businesses. The major frustration with currently available maps has been that they were neither current nor accurate, so the suggestion was made that updates and verifications be made on a regular basis by a designated government agency or NGO, and that self-reporting not be allowed, unless verified for accuracy and categorization. The maps must be easily accessed and navigated with several layers of information on each entry. Foodsheds should be identified as well as watersheds. Finally, connecting map users with available resources (education, technical assistance, and financial) is critical.

> ***"The maps should be linked to area visitor center websites because young people interested in farming are moving to the area. The maps need to be layered, up to date, and not require the user to go back and forth between maps in order to get needed information."***

10. The final question of the day was to identify one opportunity to strengthen the regional food system. Participants stressed that local government must be engaged with and committed to the development of the local food system in order for communities to have a sustainable economy. Incentives must be developed and trainings provided to encourage a new generation of farmers. Trainings on succession planning and working land preservation are also key to sustainability. Finally, information regarding local food system infrastructure needs (including storage, processing, and distribution) must be communicated to the public and local government and implemented on a regional basis.

> ***"A systematic regional approach to food system development is key. It cannot be on a county by county basis. There is a natural symbiosis between rural and urban, but coordination and infrastructure have to be regional."***

The following section provides a summary of each region's responses to the 10 focus group questions.

Question 1: *How do you define "local" when you purchase "locally grown/caught/raised" food products? Think about this in terms of radius and other values.*

Key takeaways: relationship with the farmer; "region" versus state boundaries; awareness of seasonality of fruits and vegetables; "local" meat is especially dependent on the farmer connection; 50-150 mile radius, depending on the food sought; family farms versus big ag; there is a need for more honesty and transparency from retailers; more concern for the environment

Sandhills: "Local food" certainly encompasses food purchased at a local farmers market or roadside stand and sold by farmers either personally known or represented to be from the county where the farmers market or roadside stand is located. The standard geographic region used by grocery stores is food sourced with a 100-mile radius, and depending on the food category, like seafood, may extend to include the entire state of North Carolina. However, ***among many consumers there is a lack of trust about food labeled "local" at the grocery store.***

Southeast: "Local food" includes foods grown within the NC state borders, but since this region is so close to South Carolina, also includes food grown in South Carolina. The local food hub works with farmers within a 50-mile radius, but has partnerships with growers further away in order to provide the best quality, seasonal fruits and vegetables. ***Among elected officials, the definition of "local" is limited to farmers in the county they serve***; however, the connection to the farmer is the most important piece for true locavores. Finally, what grocery stores advertise as being "local," does not always fall within this definition of local.

Foothills: "Local food" means food that is sourced within state boundaries. The radius ranges from 50 to 150 miles, depending on the food. ***The relationship with the farmer matters, because people trust farmers they know.*** For food safety concerns, it is important that food be sourced within US borders.

Triangle: It's easiest to understand and define "local" as being grown, caught, or raised in North Carolina. While we may source some of the foods we distribute from Southern Virginia, we don't believe it fits the definition of local. ***Every retailer has a responsibility to define what's local for them.*** Consumer preference is "hyper local," so I you're going straight to a farmers market or the back of a truck, it is very local. An intermediated supply chain can only be met through a regional infrastructure. Drawing a circle around Raleigh, we have to source 150-200 miles each way, which crosses both the Virginia and the South Carolina borders. ***Local is relative to what's available and when.*** Consumers want honest marketing and transparency. ***Local means nothing if it's not any good.***

Triad: The image that comes to mind is a one on one relationship with a buyer and a grower, which of necessity takes place within a small geographic area. Grocery stores are greenwashing their relationship with the farmer, so the sense of place and seasonality gets extended. ***Family farms is a big piece of local, as well as a community of food businesses that support the local food system.*** Local is more about values than geography – do you know the farmer name or family? ***We have a lot of very big food (industrial ag companies) in North Carolina. They provide jobs and tax dollars and all that, but they are owned by another entity far away that may not have the need or focus on taking care of the environment.***

Question 2: *Do you think that the demand for local food is growing in your region? Why or why not?*

Key takeaways: food awareness; food sovereignty; greater disposable income; need for education and awareness among other populations; no premium in the rural areas; institutional demand; need for convenience; downtown redevelopment; need for ag land preservation in counties with urban centers; need for small scale farmers to aggregate through cooperatives or food hubs

Sandhills: There is a growing demand in the region, but mostly from institutional buyers like restaurants, hospitals, and resorts. Because farmers are aging and there are less farms, the 100-mile "local" radius is stretching. ***There is a need for small scale farmers to aggregate through cooperatives or food hubs.***

Southeast: Demand for local food is growing, particularly for high quality, local meat. Production of fruits and vegetables is too labor intensive and the cost of land is too high to make a profit selling fruits and vegetables. Restaurant demand is growing more than anything; not so much in the home kitchen. Farmers markets and CSAs are struggling. ***CSAs are hard to find. Farmers markets hours are inconvenient for the working person. The fact that Walmart is willing to put in extra time and money to publicize a "local" section must mean that there is a growing demand within the general population. Local food has been a driving force for the redevelopment of the downtown areas of some communities.*** There is a lot of development pressure on agricultural lands in the region.

Foothills: Retirees in the region want "clean" food and knowing where your food comes from is key to satisfying that demand. The farmers markets in larger cities in the region have grown, but not so much in the smaller cities. ***Convenience to a farmers market plays a key role in whether people will shop locally, so hours of operation and location are critical. Social medial and other information on the web are influencing food values among younger consumers.***

Triangle: Demand for local food is definitely growing in the region because it is seen as being more healthy and natural. However, the convenience of the grocery store has caused some farmers markets to plateau. Demand is there, but there are bottlenecks. Infrastructure for small processing is absent and crippling. ***Local foods is an urban phenomenon; there's no premium in rural areas because people have been getting it off the truck for generations.***

Triad: The experience of small farmers in the region is that it is growing exponentially because of the consumer living in the region's larger cities who has greater disposable income and food awareness. In particular, there is a rise in demand for organic food. Chefs are also demanding it. ***In the rural areas as well as in low wealth communities in the region's cities, there is a need for education and awareness of the health value of fresh food, and food is fresh only if it is locally sourced.*** There is also a concern that cooking skills by the average consumer are dwindling, in part because of lack of time, so while demand for local food may be growing, it is not necessarily in the home kitchens . . . more in restaurants and institutional food preparation. The rise of local food councils is another indicator of the growing demand for local food, but there are policy issues and other barriers that need to be addressed in order to strengthen the local food system.

Question 3: *Discuss if the cost of local food in your region is more or less than what people pay for non-local food.*

Key takeaways: Walmart "local food" is questioned; yes and no; farmers market sellers are underselling to get rid of product; local meat is always more expensive; higher price justification for smaller scale farming because of subsidies for big ag as well as volume farming; portion size and packaging; distinction between prices in cities versus rural areas

Sandhills: If the consumer is purchasing “local food” from Walmart, then local food offered anywhere else will be more expensive. Local meat products are always more, but local food offered through CSAs is competitive with upscale grocery store prices. ***Many consumers are not aware of all of the farmers’ expenses so they will shop for convenience and price and are less interested in what is healthy.***

Southeast: Larger conventional growers have greater volume, which means retailers are able to purchase in bulk, and food to the consumer is less expensive. ***The smaller scale farmer has to price their product higher and this higher price gets transferred to the consumer.*** Local food offered at farmers markets are about the same cost as at the supermarkets, except for local meat, which is significantly more. Consumers seem to prefer organic when it comes to local food, and when it comes to organics, direct sales to consumers through farmers markets and CSAs may be cheaper than grocery store prices for organics.

Foothills: While prices for local food historically have been higher, now some grocery stores are surpassing the farm stand prices. The perception is that local food is more expensive, but this is not necessarily the case. Only local meat is more expensive than grocery store prices. However, ***often farmers market sellers sell below what they should sell at. They don’t want to take anything home, so they undersell.***

Triangle: ***The cost of local food is more, because there is not scale. Buy a pallet at one price; buy a truckload at a cheaper price. The entire US food system is built around truck loads and rail cars.*** Subsidies also support big ag, not small scale. Local farmers need to learn how to extend their seasons, and they will get a better price. ***Portion size and packaging are key to making the small scale farmer competitive.***

Triad: People who prefer Mom and Pop restaurants are not interested in fresh food. The high-end customers will go to the high-end restaurants and pay more for the local, fresh food. Dollar wise in the city, local food is more expensive, and non-local food is cheaper, but non-local food quality is also “cheaper.” There is a MYTH that local food is more expensive. It is concerning to hear that myth being shared here. It depends on the venue and where you look. ***You also need to look at the benefits of buying locally, including the recirculation of the same dollar within a community.***

Question 4: *What sources of information do you use to determine your market for locally grown/caught/raised products?*

Key takeaways: vegecation; convenience; customer surveys; Extension; AMS; media; NC Growing Together spreadsheet; word of mouth for restaurant sales; significance of food hub; personal experience; some census data

Sandhills: To determine a target market, we typically use census data about households. Previous year’s sales help in planning for next year, and only grow what people will buy.

Southeast: Facebook is a great way to market product locally. ***Food hubs are a great source of information***, and finding which restaurants are buying is typically word of mouth. Food hubs connect farmers with chefs.

Foothills: Local food councils are playing a key role in mining the data by conducting consumer and institutional buyer surveys. There is also a lot of information on how to run a good farmers market at marketumbrella.org. There needs to be more consistency and thought given to farmers market placement and hours of operation. ***Farmers markets are not necessarily a growth strategy for every small town.***

Triangle: Retailers need to specialize in "vegecation" – education about what's in season, what grows locally, and how much it costs to transport it from the field to the plate. Ten years ago, consumers were driven by the desire to purchase local food; now they are more interested in convenience, which has resulted in front porch delivery of local foods with recipes. Customer surveys determine whether they are willing to pay more; is the source of the food or the cost more important; what are the thresholds with sourcing, cost basis, delivery? ***Media and social media influence the trends – NC chefs are getting ideas from national media.***

Triad: There is a multi-faceted approach to making business and marketing decisions concerning local food – word of mouth, internet, reading, listservs, surveys of customers. All of this has resulted in business diversification and alternative revenue streams from direct sales, agritourism, subscription programs, a little wholesale, and some sales to restaurants. Farmers hear that a restaurant is buying from the locals and make an appointment to meet the chef. ***New farmers go to Extension to learn how to price their product. Some farmers use the AMS wholesale price site, but get lost in it every now and again.***

Question 5: *What assets or resources are needed for this region to have a strong local food system?*

Key takeaways: cooperative formation for aggregation and distribution; government incentives and use of public lands; new farmer trainings; consumer education; more distribution and value-added infrastructure; access to affordable lands; cooperation among distributors to fill gaps; communication about available infrastructure; don't put all your eggs in one basket; underused assets

Sandhills: More young farmers are needed, as well as access to capital and land. In addition, there is a need for an input output study -look at what is selling at the local grocery stores that regional farmers can produce in quantity. We also need regional scale processing equipment, particularly for poultry and meat processing. ***Farmers need to organize as cooperatives in order to aggregate and distribute their food products***. Farmers markets need to consistently sell high quality product at times and locations convenient to the consumer. An awareness campaign is key to influencing the consumer mindset to buy local food.

Southeast: Ideally, there would be an annual food fair focused on local food access and availability. ***Government incentives***, including farming of public lands, is very important for strengthening the food system. New farmer trainings will help with the aging farmer crisis in the state. Consumer education is critical, as well as more transportation options to get the food to market.

Foothills: Access to affordable land is a critical need in the region, as well as more and younger farmers who get the training they need. Farmers need to collaborate and find a single point of contact to learn of distribution options, including organizing into cooperatives. ***However, there is resistance among farmers to be a part of a formal collaborative structure.*** They prefer to share informally. Value-added structures are needed to enhance fresh raw product, but the rules and regulations governing value-added products are too complicated. A food policy council could focus on the barriers to entry to value-added and make recommendations to ease that entry.

Triangle: There is a need for a more dynamic AMS list of GAP-certified farms as well as publicizing information about the different levels of GAP. ***Regional movement of product is needed; if distributors cooperated with one another, some of the current gaps could be filled.*** Small scale farmers need to help each other out by referring customers. ***There is also a need for better communication about infrastructure available to the small farmer as well as networking about distributor needs.*** The reason the local food movement is challenged is because of the risk. Farmers want to know the market is there. Buyers want to know the product is there. Each is waiting on the other. Indication of what they need doesn't necessarily mean that they are ready to switch to the new product. Cold storage and commercial kitchens sometimes sit empty. ***Never rely on one distributor. Farmers should have at least 4 distributors. A big achievement would be to have a national distributor talk with the local growers.***

Triad: There is a need for some sort of processing facility to extend the shelf life of local food. Aggregation is a critical need of the region, as well as identification of the best spot to advertise your product. There is a huge generational gap when it comes to cooking, so there needs to be more education on how to can, freeze, and prepare meals. ***We need to shift patterns of investment – not just putting the onus on low wealth communities to attend classes. We should invest in small food-related businesses in low wealth communities by creating revolving loans, etc. to support the development of that infrastructure.*** Starting food education when our kids are young, through programs like the Food Corps, has yielded good results like school gardens. ***Increasing the number of school gardens can increase the consumer demand for local food.*** We need a commitment from our policymakers in local government to support a local food system, seeing it as an economic opportunity to support small business and putting money behind that, for example, why can't our school system buy from local sources. In some places in the region, there are too many underused commercial kitchens in church basements. Why can't they be used as test kitchens for new products?

Question 6: *How is local food brought from farm to market (distributed) in your region?*

Key takeaways: local food distribution is borne primarily by the farmers; inefficient; need detail on distribution routes and food hub requirements; the roles of ASAP and FDE.

Sandhills: Farmers bring trucks and refrigerated trailers to the farmers markets. Some producers drop off their product at a central packing station; food banks will pick up excess product donated by the farmers. Some grocers accept direct drop shipments onto their produce market floor. There was a need for aggregation and demonstrated institutional demand, so a food hub is currently under development.

Southeast: Farmers bring their product to market or restaurants or food hub via truck. Feast Down East plays a critical role in food aggregation and distribution when moving product from the farm. Farmers markets are inconsistent outlets; ***there may be an opportunity for an entrepreneur to aggregate on behalf of several farms.***

Foothills: Farmers take their product straight to the restaurant or to market. Orchards take their apples to packers in another county for distribution nationwide. There are informal agreements among farmers to sell the products of other farmers on their farms or take them to market. ***ASAP (Appalachia Sustainable Agriculture Project) provides a great service to farmers by connecting farmers with chefs and food service buyers as well as marketing and trainings.***

Triangle: The bulk of local food distribution is handled by the farmers. In rare cases, a food hub will pick up food from the farm. Farmers do not cooperate with one another, driving past other farms to bring their food to the store of hub. ***This creates a tremendous amount of inefficiencies. A map that shows the location of distributors and whether they work with small farmers would be helpful, but knowing where their routes are is more important.*** It would also be very helpful to know what each so-called food hub does – how it takes product, etc. The number and location of farmers markets is not as important as knowing their quality, including the rules governing who can sell there. Farmers markets play an important social role for smaller communities, in particular.

Triad: Most local food is sold directly to consumers at farmers market or on the farm. Farmers bear the burden of moving product to restaurants, institutional buyers, and wholesalers. Sometimes the distributor will come to the farm. Some product is moved through individual or multi-farm CSAs. An infrequent occurrence is to have the chef come to the farm. Some farmers markets have good locations but poor managers, so there is inconsistency in quality and profitability.

Question 7: *Describe the need for cold storage in your region.*

Key takeaways: not enough; differing needs; food safety; underutilization; location is critical

Sandhills: There is not enough cool or cold storage in the region. The food hub under development needs to ensure there is enough cold storage.

Southeast: There is a need for cool storage for strawberries and freezer storage for beef. Participants were not aware of existing cold storage availability in the region.

Foothills: Research needs to be done to determine what facilities are right for the product. There is also a question of who is responsible for food safety. Regulations on use need to be developed.

Triangle: There is some underutilized cold storage. Location is critical; it needs to be where we need it, but it is difficult for a small farmer to justify the costs of even a small cooler storage. Would subsidies help?

Triad: Cold storage in the region is perceived to not be available to small farmers.

Question 8: *Describe the need for processing facilities in your region.*

Key takeaways: mobile poultry processor; incubator kitchens; education for value-added

Sandhills: There are some commercial kitchens in church basements, but they would need to be certified and then could not use them for non-compliant church functions. Consider getting your own kitchen certified is an option for some home-based businesses.

Southeast: There is a need for a humane kill meat processing facility, as well as one for collards.

Foothills: There is a huge need for meat processing; local processors are to capacity just serving the hunting business. To ship nationally, you have to go to Virginia to process. ***There is an education void when it comes to regulations, knowing how to process, and what the labeling requirements are.*** The mobile poultry processor is underutilized.

Triangle: There seems to be less of a need for cold storage in the region and more of a need for processing. Increasingly wholesale and direct customers want quick cook ready product. Processing needs to scale up to match, but not overshoot, the market. Institutional buyers want processed product, and they are not getting much of it from NC. There is a need for processing that could do complimentary products. Chefs don't want to sell beans, for example. There is an even bigger need for bottling in NC. The facilities have to be where the demand is and where the distributors are. ***Do first stage processing in rural areas, but canning and bottling in the urban areas where the distributors are. Waste needs to stay where the production is.***

Triad: There is a definite need for processing among small farmers and value-add. It would be nice to duplicate Blue Ridge Food Ventures in the region, as it has launched many now larger companies. There is also a need for a mobile poultry processor as well as a certified organic processor.

Question 9: *How do maps help people to plan a local food-related business?*

Key takeaways: up to date and accurate; easily accessible; more detail on availability of facilities to small scale farmers; good starting point; organic farms; water quality and water systems; connecting map users with available resources, TA and financial

Sandhills: Maps identifying the location and the capacity of processing and cold storage facilities could be useful to a new producer, but only if they are accurate. These maps must also be housed on a web site that is easy to find and navigate. It is also important to know whether these facilities are open to the small scale producer. ***There is a question as to whether the maps are any better than simply doing an internet search for the needed information.***

Southeast: ***A map that would identify where local food producers are located would be beneficial to farm to table restaurants.*** When fruit/vegetable growers want to scale up from direct sales, it would be helpful to know the routes of distributors. ***The maps are also a good way for smaller processors to advertise.*** Food entrepreneurs may find the maps helpful when determining where to locate their new food business.

Foothills: ***The maps should be linked to area visitor center websites because young people interested in farming are moving to the area. The maps need to be layered, up to date, and not require the user to go back and forth between maps in order to get needed information.*** A GIS map is only as good as the data, the verification of the data, and how to use the data. Self-input is not well-suited to accuracy because the person providing the information may not understand the criteria. It would be important to verify the information with the local Extension office or other organization or agency familiar with the state of agriculture in the region.

Triangle: The maps should only locate processors and storage facilities available to small scale producers. There must be dedicated personnel regularly updating the maps. ***For the entrepreneur the maps are valuable, but realistically, small scale farmers know what they want to do and the information on the map won't shift their mindset.*** The maps are a great starting point and useful to a small business center, but only if there are extra layers of detailed information. ***It would also be useful to be able do a reverse search by county geography so that businesses that serve the county can be identified, including where the business goes, and where it sources from.***

Piedmont Triad: Knowing the location of processors (or lack thereof) could influence business decisions of small scale farmers. The maps also introduce food policy councils to the stakeholders in the local food system. It would be very helpful to know where North Carolina's organic farms are located. ***In addition, how can these maps be overlaid with water quality and water systems (it's important to know where the poultry and swine farms are), as well as the food sheds. Where are the farms located, what is the infrastructure supporting those farms, their transportation network, etc.*** Accurate and up to date information are key to the maps' usefulness.

Question 10: *Name one opportunity you think would strengthen the local food system in your region.*

Key takeaways: Commitment and engagement of local government; communication; need to capitalize on the urban connection; consumer education; new farmer trainings; incentives; succession planning; processing

Sandhills: ***Each regional food system needs to brand and learn how to market the food it produces.*** Mobile poultry and beef processors are also important for the region, as well as fruit and vegetable processing/commercial kitchen.

Southeast: There should be more new farmer trainings to support the next generation of farmers. New farmers should also be connected to available land and given incentives to farm. ***The land needs to stay***

in production so there needs to be a way for retiring farmers to ensure their lands remain working lands.

Foothills: ***Every county should have a local position dedicated to ag economic development***. "Local foods" needs to be part of the conversation surrounding agriculture, not just "big ag."

Triangle: Better communication on logistics and market demands that resembled an "Uber" for farm logistics and distributions would be ideal. Distributors need to network so that the growers have less risk when transitioning away from row crops. ***A systematic regional approach to food system development is key. It cannot be on a county by county basis. There is a natural symbiosis between rural and urban, but coordination and infrastructure have to be regional.*** USDA resources are difficult to access and navigate; targeted subsidies to small farmers are key to the development of a profitable enterprise. Consumer education, sharing information, networking, and cooperation will help the small farmer capture a greater share of the consumer dollar.

Piedmont Triad: We need infrastructure to support small producers – without some processing, some agriculture distribution, and better markets, we will keep spinning our wheels. Our region needs to do a better job of building awareness of the local food system. We have the information, but people do not know where to find it. ***A local government commitment to the economic development opportunities within a strong local food system could result in a stronger, more sustainable local economy.***