REGIONAL FOOD SYSTEMS IN NEBRASKA: THE VIEWS OF CONSUMERS, PRODUCERS AND INSTITUTIONS

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Key Findings

Consumer Views

- Consumers are overwhelmingly interested in purchasing food directly from local producers.
- A large majority of consumers believe the supply of producers selling food directly is difficult to find.
- Consumers believe the availability of locally produced foods is important to some degree to their households.
- Consumers showed a willingness to pay slightly more for locally grown food, but that willingness to pay has a limit. Beyond a 10 percent price increase willingness to pay decreases.
- The demand for locally grown food exists among consumer, but the market (or at least the perception of the market) may be lacking.
- Availability and affordability are the primary reasons why consumers would purchase local foods.
- Farmers markets and grocery stores are the most common places to purchase locally produced foods.
- Consumers want increased grocery store and restaurant options to purchase locally produced foods.
- Consumers commented on the hours and location inconvenience of farmers markets, which may mean more business training is needed for those operating farmers markets.

Producer Views

- A large majority of responding producers are interested in expanding their local food production capacity.
- Producers interested in expanding their local food production stated technical assistance issues involving labor, infrastructure (processing and lockers primarily), basic business skills and finances are the most needed.
- A majority of producer respondents are interested in participating in a regional food system.
- Producers acknowledge that numerous challenges exist for producers in a regional food system. Producing sufficient volume of products and transportation were the most common challenges.

Institutional Views

- Few institutions currently serve food obtained locally. However, responding institutions are quite interested in expanding their use of local foods.
- The most critical challenges facing institutions purchasing local foods (or interested in local foods) are timely delivery and availability of products.
- Responding institutions stated the most important factors they saw preventing or limiting participation in a regional food system are concerns about liability and lack of appropriate contact with local buyers.

- Responding institutions said the items that would help institutions get started with the process of using more locally grown foods are local purchasing connections and a process of identifying local foods and potential sources.
- Both institutional and producer respondents stated they need assistance on developing contacts and connections with the other.

Introduction

Nebraskans spend $4.4 billion annually on food and 90 percent of that money leaves the state. There exists, however, an opportunity and a need to create comprehensive regional food systems in Nebraska that include farming and community gardening, processing, storage, distribution and transportation, and food access. The opportunity comes from a current positive attitude toward local foods and the growing national emphasis placed on food security, health and the environment.

While neither full-blown local nor regional food systems have yet to become part of Nebraska's landscape, there is interest in local foods as demonstrated by national research and the increased number of farmers markets, food stands and grocery stores selling locally grown items. The critical first step toward making this change is to gather important baseline information from consumers, institutions, retail outlets and farmers and ranchers in Nebraska to determine what barriers and opportunities are in place and what the capacity and interest of Nebraska's farmers are to meet the demand for locally grown food.

Regional food systems can address critical issues for rural communities by creating wealth and jobs in rural communities with the potential to repopulate rural areas. A strong regional food system would positively impact rural communities as the system would continue to grow, adding opportunities in processing, storage, distribution and transportation.

A project in partnership with the University of Nebraska-Lincoln, the Center for Rural Affairs (CFRA), and the Nebraska Sustainable Agriculture Society, and funded through a grant from the Federal State Marketing Improvement Program (FSMIP) of the Agricultural Marketing Service of USDA, seeks to identify the prospects and challenges of creating a regional food system. The survey results reported herein are part of that project with the survey inquiring of several groups – consumers, producers, institutions and grocery stores – of their experiences with locally produced food, their views of locally produced food and their opinions of regional food systems.

For purposes of this survey, "local food" was defined as food and food products that are produced or processed locally and are not brought in from outside the state. "Regional food systems" was defined as efforts to build more locally-based, self-reliant food economies so Nebraskans don't send 90 percent of their food dollars out of state.

Survey Methodology

The self-administered survey was e-mailed to the CFRA Nebraska database. A total of 2,499 individuals were emailed the survey. The CFRA database is comprised of recipients of the CFRA monthly newsletter. In addition, an unknown number received the survey through links forwarded by individuals or organizations.

A 2011 survey of CFRA newsletter recipients showed 32.4 percent of newsletter recipients live on a farm or ranch and are current or retired farmers or ranchers. Extrapolating that percentage to this survey, 810 recipients of this survey are considered farmers or ranchers.

The survey was available in September through November 2012. Four different surveys were included in the item emailed to the database – a separate survey for consumers, producers, institutions and grocery stores. Each respondent could complete the survey that applied to him or her (for example, a farmer could complete both the consumer and producer surveys). Each survey consisted of a series of multiple choice and open-ended questions. The survey was available to participants through SurveyMonkey.com©. One follow-up reminder email was sent in September 2012.

A total of 375 responses to the survey were obtained. The largest number self-identified as consumers (300), followed by producers (40), institutions (31) and grocery stores (4). Respondents were allowed to answer in multiple categories. All respondents live and work in Nebraska.

Since the CFRA database used for this survey contained few grocery stores and institutions, alternative methods were used to develop separate lists for those survey recipients. The list of rural grocery stores used for this survey was created from an existing list CFRA developed from USDA Supplemental Nutrition Assistance Program data. This list, however, generally contained no email information. To improve this list, an overarching Internet search was executed for these stores in addition to others (e.g., "grocery stores in Wolbach, NE"). Each of the grocery stores on the aforementioned list was searched on the Internet; those that had email addresses were added to the survey list, those that did not were called in order to inquire about email communication.

Very few rural grocery stores maintain websites, but their telephone information was made available during these searches through the Yellow Pages or similar engines. There are many challenges associated with contacting grocery stores and the institutions that will be mentioned later. Often, upon calling a grocery store, the individual in charge of purchasing was not there or unavailable. Often upon speaking with the individual it was discovered the grocery store did not have an official business email account (it is possible that they were uninterested in sharing the address, but didn't mention being uninterested). Larger grocery store chains do maintain websites, but their email contact is often: info@. The survey link was sent to several large chains through the info@ address. In these cases, store directors' email addresses were added to the contact list. Several store managers or directors mentioned being interested in participating, but few, if any did.

Similar challenges were faced when trying to contact the individuals in charge of purchasing for hospitals, nursing homes, or other health care facilities. Smaller institutions in rural communities did not have easy to access contact information on their websites. This resulted in many phone calls to the food service or dietary department and many voicemails. Many of the individuals who were contacted from larger hospitals shared that they do not do any of the purchasing. Instead one individual does all of the ordering for several hospitals or hospital branches (generally from a large food service company such as Sysco).

The list of schools used for this survey was also created from an existing CFRA list developed from the Nebraska Department of Education. This list contained superintendents from Nebraska schools including their email contact. In addition to this, an Internet search for colleges and universities in the state of Nebraska was conducted. The contact information for these institutions was easier to access. The dining-staff specifically had their own webpage for a majority of these institutions, including email information.

Following are selected findings from the survey. All survey results may be found in the Appendix.

Consumer Preferences and Local Foods

Consumer responses were from a broad cross-section of Nebraska, with responses from 62 of Nebraska's 93 counties.

Consumers are overwhelmingly interested in purchasing food directly from local producers. Nearly 93 percent of consumers stated they would be interested in purchasing food directly from a local producer for their household. Over 60 percent strongly agreed with that statement. Only 3 percent of consumer respondents disagreed with that statement.

When consumers who purchase food directly from a local producer were asked if price and quality were competitive, nearly 95 percent agreed. Nearly 70 percent strongly agreed with the statement. Only 2 percent of consumers disagreed with that statement.

Consumers also exhibited near unanimous support of purchasing food directly from a local producer if the supply exists. When consumers were asked if they would purchase food directly from a local producer if a source was available, nearly 95 percent agreed. Over 63 percent strongly agreed with the statement. Only a bit over 1 percent of consumers disagreed with that statement.

A large majority of consumers believe the supply of producers selling food directly is difficult to find. Nearly 62 percent of consumers agree with the statement that it is difficult to find farmers to purchase from directly. Nearly a quarter of consumers (23 percent) disagreed with that statement. Nearly 15 percent of consumers are unsure.

Consumers also stated that the availability of locally produced foods is important to some degree to their households. Over 97 percent of consumers said locally produced foods are at least somewhat important to their households.

Consumers also showed a willingness to pay slightly more for locally grown food, but that willingness to pay has a limit. Nearly all consumers (almost 99 percent) would purchase locally grown food if the price were the same as for non-locally produced food. If locally grown food was 10 percent more expensive, a large majority of consumers (almost 84 percent) would still purchase locally grown food. However, beyond that point willingness to purchase locally grown food decreases as locally grown food becomes more expensive (for example, less than 40 percent of consumers would purchase locally grown food if such food was 20 percent more expensive). However, the core purchases of locally grown food are strong – three in 10 consumers would purchase or might purchase locally grown food even if it was greater than 30 percent more expensive.

These responses clearly indicate that consumers are interested in purchasing food directly from local producers, believe such food is important, will purchase if price and quality are competitive with non-direct purchased food, but discover it difficult to find producers selling food directly. In other words, the market exists, but the supply (and suppliers) may be lacking.

Why Consumers Purchase Local Food

Consumers were asked an open-ended question on what factors would lead them to purchase locally produced or processed goods. All responses were reviewed and classified in categories. Despite the number of answers to the question, responses could be categorized into a few common areas that represent the most important reasons why consumers purchase local food items:

- Availability
- Affordability/competitive prices
- Information about production methods and environmental effects of production methods
- Convenience and easy access
- Quality/taste/freshness
- Concerns about health and healthy food
- Methods to support the local economy and local producers

Consumers and Local Foods Purchasing Patterns

Consumers were asked where they made purchases of locally produced foods. Respondents were allowed multiple responses.

The most popular spots to purchase local foods are farmers markets – 76 percent of respondents purchase local foods there. Grocery stores are the next most popular, with over 68 percent of respondents purchasing local foods at a grocery store. That signals an opportunity for grocery stores in rural communities. Purchases from farmers also had customers, either through direct purchases (42 percent of respondents) or Community Supported Agriculture operations (about 14 percent).

Several consumer respondents also mentioned they purchased local foods from the Nebraska Food Co-op and other farmer cooperatives. Several consumer respondents also stated they purchased local food products from roadside stands (sweet corn and other vegetables, for example). And, of course, numerous consumer respondents stated they grew their own local food.

Consumers also wish their communities had more retail sources of locally produced food. Over 85 percent of consumer respondents want more grocery store offerings, and 57 percent of consumers want more restaurant sources of locally produced food. Both responses suggest a significant potential market for rural entrepreneurs in the grocery and restaurant businesses.

Over half of consumers also want more farmers market and direct purchasing opportunities in their communities.

Numerous consumer respondents commented on the inconvenience of farmers markets in terms of location and hours (important because convenience was also listed as a major factor in the decision to purchase local food). Some consumers commented that grocery stores and restaurants need to do a better job of advertising when local foods are available in their establishment. Finally, several consumer respondents commented that school food programs – from school lunch programs to colleges and universities – needed to incorporate more local foods.

Producer Experiences with Local Food Production

Forty respondents answered the Producer survey. Respondents represented 19 Nebraska counties.

When asked how they produced food products, the majority of respondents employ organic production methods and/or sustainable methods. Half of respondents use organic methods, but are not certified organic producers. Over two-thirds of respondents also said they use sustainable methods (this, in fact, was the most popular response; multiple responses were allowed). About a third of producers said they used conventional production methods.

Producers were asked what food products they currently produce for sale. The largest number stated a type of meat product – beef, lamb, poultry or pork, or often a combination. The second largest number stated vegetables, followed by eggs.

No matter the method of production, a large majority of respondents are interested in expanding their local food production capacity. Over 81 percent of producers are interested in expanding their production of locally purchased food.

Producers and Local Food Selling Patterns

Producers either sell a lot of their agricultural products locally (within 150 miles) or nothing. Nearly half of respondents (47.5 percent) sell greater than 75 percent of their agricultural products locally. However, another 35 percent sell less than three-fourths of their products locally. The remainder (17.5 percent) sells between 5 and 74 percent of their products locally.

Nearly 60 percent of producers sell food products on the farm (direct sales to consumers). Over a quarter of producers sell food products at farmers markets. Nearly a quarter of producers sell their food products to or through local grocery stores. Several producers also offered that they sell products through direct, off-farm marketing or delivery.

However, a small number of producers sell their food products to restaurants or institutional markets or through Community Supported Agriculture outlets. These represent significant opportunities lost to producers.

Producers and the Future of Local Foods

Producers were asked what type of locally produced food products they would consider adding to their production. Producers gave a number of responses, representing the wide and growing variety of Nebraska agriculture. The largest number of responses was vegetables in general or specific vegetables. Fruits and chickens or other types of poultry were next most popular.

If producers were considering expanding their operation they were asked what kind of technical assistance would be needed. Again, the responses were numerous and varied, often connected to individual circumstances. Issues involving labor and infrastructure (processing and lockers primarily) were the most often mentioned. Assistance on basic business skills and finances were also mentioned frequently.

Producers and Regional Food Systems

A majority of producers (62 percent) are interested in participating in a regional food system.

Despite the interest from most producers in participating in a regional food system, they acknowledged that numerous challenges exist for producers in a regional food system. The survey provided producers a series of potential challenges to the question of what challenges exist in a regional food system. The most frequent challenges mentioned were:

- Cannot provide sufficient volume of products
- Transportation to market is too expensive
- Distance to the nearest farmers market
- No processing facilities available
- Do not have appropriate contact with local buyers

In open-ended responses to this question, producers also repeatedly mentioned the challenge that skill building for this type of production and operation is a slow process. In the same vein, there were numerous responses related to the challenge and difficulty of reaching new customers and that usual methods – such as mass media – are very expensive.

Institutional Experiences with Local Foods

Thirty-one institutions (primarily schools and school preparation divisions) from 10 counties responded to the survey.

Few institutions currently serve food obtained locally. Nearly three-quarters of institutional respondents served less than 5 percent of food purchased locally (within 150 miles). About 16 percent of institutions served between 5 and 24 percent of food purchased locally.

Those institutional food servers that do employ local foods serve a variety of locally produced or processed food products. Those mentioned were meat, eggs, cheese, nuts, popcorn, pumpkins, watermelon and sweet corn.

Institutions and the Future of Local Foods

Despite the current deficit in the use of local foods among institutions, institutions are quite interested in expanding their use of local foods. Almost all institutions (nearly 95 percent) stated they were interested in expanding. The majority of institutions stated there is administrative support for purchasing local food products. Nearly 60 percent of institutions characterized their administrations as “excited” about purchasing local food products. Only 5 percent of institutions characterized their administration as “opposed” to purchasing local food products.

Over 84 percent of institutions agreed that they are interested in purchasing food directly from a local producer (over 63 percent strongly agreed). As with consumers, institutions are very interested in purchasing local food directly from producers if price and quality are competitive. All institutional respondents agreed with the statement that they would be interested in purchasing local food products directly from producers if the product(s) met those qualifications (nearly 74 percent strongly agreed).

Most institutions stated they would purchase food directly from a local producer if a source was available. Over 89 percent of institutional respondents agreed with that statement (over 63 percent strongly agreed). All institutions stated they would purchase food directly from a local producer if their vendors and/or warehouse distributor offered local foods as part of their contract services (nearly 80 percent strongly agreed).

Institutions were asked what food currently served could be purchased locally. Vegetables were the most common response, including greens, tomatoes, sweet corn, squash and cucumbers. Other food products mentioned were sandwich meats, cheeses, fruits, nuts and beef.

Institutional respondents were also asked what food products currently served could be competitively produced in the community or within 150 miles. Meat products (particularly beef) and vegetables were most commonly mentioned. Potatoes, dairy products, bread and baked goods and fruit were also mentioned.

Institutions and Local Food Challenges

Institutional respondents were asked what among a series of factors are important when establishing a relationship with a local producer or processor (multiple responses were allowed). The most important factors according to institutions are timely delivery and availability of products. Slightly less important (but still important to most institutions) are cost comparisons. Several respondents also mentioned quality and food safety as important factors.

Institutional respondents were also asked what factors they saw preventing or limiting participation in a regional food system. A list of several barriers were provided (multiple responses were allowed). The most popular factors were:

- Concerns about liability
- Lack of appropriate contact with local buyers
- No infrastructure to deliver fresh products
- Cannot find sufficient volume of local products
- Competitive price (expense of local food products)

While nearly two-thirds (64.7 percent) of institutional respondents participate in a USDA meal program, many respondents stated that storage issues could affect their ability to purchase local foods or expand their local food purchases. Nearly 90 percent of respondents said they had dry store, refrigeration or freezer space if purchases of fresh stored fruits and vegetables were expanded. But several respondents said they had challenges or barriers related to cold storage that could affect purchases of local food products.

When asked what would help institutions get started with the process of using more locally grown foods, the vast majority said local purchasing connections (nearly 89 percent of respondents). A large portion of respondents (over 72 percent) stated assistance in identifying local foods and potential sources. A small number (a third of respondents) said actually meeting with farmers and suppliers would help.

In open comments to the question of what help institutions need to get started using more locally grown foods, a vendor or broker was mentioned to take care of the “leg work” such as delivery and invoicing. Several respondents stated they do not have the time to deal with multiple suppliers, which appears to be a major barrier to institutional local food purchases, particularly among small, rural institutions such as schools. Working with major vendors such as Thompson and Sysco to make the process streamlined for institutional purchasers was suggested.

Others offered that convenience and competitive pricing would help institutions get started with the process of purchasing more local foods. Developing a list of potential suppliers that meet USDA requirements for school lunch programs was another idea. Still others suggested online marketing and ordering would help the local foods purchasing process get started.

Both institutional and producer respondents stated they need assistance on developing contacts and connections with the other. This seems to be an area of common need and an area that could be worked on for the future development of local food usage and production and successful regional food systems.

Grocery Stores and Local Foods

Only four grocery store respondents completed the grocery store portion of the survey. That small sample does not allow for reliable reporting. Therefore, we will not report those results here.

APPENDIX

Below are tables for each multiple choice survey question listing response results. Totals may not add up to 100 percent due to rounding.

Consumers

For each statement, select what best indicates how much you personally agree or disagree with the statement.

	Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree	Does Not Apply
Interested in purchasing food directly from a local producer	1.1	1.8	3.2	32.7	60.4	0.7
Would purchase food directly from a local producer if price and quality were competitive	1.4	0.7	1.4	25.0	69.9	1.4
Would purchase food directly from a local producer if a source was available	1.1	0.4	2.5	31.8	63.2	1.1
It is difficult to find farmers to purchase from directly	3.7	19.4	14.6	37.7	24.2	0.4

How important is the availability of locally produced foods to your household?

Response	Pct.
Not Important	2.9
Somewhat Important	15.8
Important	44.4
Very Important	36.9

Would you purchase locally grown foods if the locally grown food was:

	Yes	No	Maybe
The same price	98.9	0.0	1.1
10% more expensive	83.7	4.1	12.2
20% more expensive	34.2	30.8	35.0
30% more expensive	10.8	59.6	29.6
Greater than 30% more expensive	6.2	70.0	23.8

Where do you make purchases of locally produced foods? Multiple responses allowed.

Response	Pct.
Farmers markets	76.0
Community Supported Agriculture (CSAs)	13.8
Direct purchases from producers	42.2
Grocery stores	68.4
Other	13.4

What sources of locally produced food do you wish your community had more of? Multiple responses allowed.

Response	Pct.
Farmers markets	54.4
Community supported agriculture (CSAs)	39.1
Direct purchasing	53.6
Grocery store offerings	85.4
Restaurants	56.9
Other	6.6

Producers

How do you produce your food products? Multiple responses allowed.

Response	Pct.
Conventionally	30.0
Organic methods, not certified	50.0
Certified organic	12.5
Sustainable methods	67.5
Other	17.5

How much of what you produce is sold locally (within 150 miles)?

Response	Pct.
Less than 5%	35.0
5% to 24%	7.5
25% to 49%	2.5
50% to 74%	7.5
Greater than 74%	47.5

Are you interested in expanding your production of locally produced food?

Response	Pct.
Yes	81.6
No	18.4

Where do you currently sell your food products? Multiple responses allowed.

Response	Pct.
On farm	57.9
Community supported agriculture (CSAs)	2.6
Farmers markets	26.3
Local grocery store	23.7
Restaurants	18.4
Institutional markets (schools, hospitals, long-term care facilities)	2.6
Other	55.3

Are you interested in participating in a regional food system?

Response	Pct.
Yes	62.2
No	37.8

What challenges do you see for producers in a regional food system? Multiple responses allowed.

Response	Pct.
Distance to the nearest farmers market	42.1
Unable to physically deliver the product	26.3
Transportation to market is too expensive	44.7
There are no processing facilities available	39.5
There is no infrastructure to deliver my product	23.7
Buyers could not adequately process my product	10.5
Concerns about liability for my products when selling directly	28.9
Cannot meet certification requirements	10.5
Do not have buyer required insurance	7.9

There are too many regulations to sell locally	18.4
Do not have appropriate contact with local buyers	36.8
Cannot provide low enough prices	26.3
Cannot produce sufficient volume of my products	47.4
Buyers would not accept seasonal products	5.3
Buyers require too much additional processing or packaging	10.5
Buyers require specific training before purchasing	7.9
Profit margins are too low to justify such sales	26.3
Local sales are too time consuming for me to consider	13.2
I don't know how to start or expand my production for local sales	28.9
Demand for local food products is too uncertain to invest in	10.5
I am too busy with my normal farm operation to get involved with local markets	23.7
Banks are reluctant to provide financing for farmers selling to local markets	13.2
Other	13.2

Institutions

Are you interested in expanding your use of local foods?

Response	Pct.
Yes	94.7
No	5.3

How would you describe administrative support for purchasing local food products?

Response	Pct.
Excited	57.9
Indifferent	21.1
Unsure	15.8
Opposed	5.3

For each statement, select what best indicates how much you personally agree or disagree with the statement.

	Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree	Does Not Apply
Interested in purchasing food directly from a local producer	0.0	0.0	15.8	21.1	63.2	0.0
Would purchase food directly from a local producer if price and quality were competitive	0.0	0.0	0.0	26.3	73.7	0.0
Would purchase food directly from a local producer if a source was available	0.0	0.0	10.5	26.3	63.2	0.0
Would purchase food directly from a local producer if my vendors and/or state warehouse distributor offered local foods as a part of their contract services	0.0	0.0	0.0	21.1	78.9	0.0

Approximately, what percentage of food products served currently do you purchase locally (within 150 miles)?

Response	Pct.
Less than 5%	73.7
5% to 24%	15.8
25% to 49%	5.3
50% to 74%	0.0
Greater than 74%	5.3

Which of the following are important to you when establishing a relationship with a local producer or processor? Multiple responses allowed.

Response	Pct.
Timely delivery	100.0
Availability of products	80.0
Cost comparison sheets	80.0
One-stop shopping	20.0

Do you have dry storage, refrigeration or freezer space if you expand your purchase of fresh and fresh stored fruits and vegetables?

Response	Pct.
Yes	80.0
No	20.0

Do you participate in a USDA meal program?

Response	Pct.
Yes	64.7
No	35.3

What would help you get started with the process of using more locally grown foods? Multiple responses allowed.

Response	Pct.
Assistance in identifying local foods and potential sources	72.2
Meeting with farmers, suppliers	33.3
Local purchasing connections	88.9
Parent/volunteer training program	0.0
Other	22.2

What barriers do you see preventing or limiting your participation in a regional food system? Multiple responses allowed.

Response	Pct.
Distance to nearest farmers market	21.1
Transportation to market is too expensive	15.8
There is no infrastructure to deliver fresh products	57.9
Concerns about liability	63.2
Do not have appropriate contacts with local buyers	63.2
Too expensive	52.6
Cannot find sufficient volume of local products	57.9
Local products require too much processing on	26.3

my part	
Local sales are too time consuming for me to consider	42.1
I don't know how to start or expand my participation in local food purchases	47.4
Scarce availability of local food products is too uncertain to invest in	42.1

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ABOUT THE CENTER FOR RURAL AFFAIRS

Established in 1973, the Center for Rural Affairs is a private, nonprofit organization with a mission to establish strong rural communities, social and economic justice, environmental stewardship, and genuine opportunity for all while engaging people in decisions that affect the quality of their lives and the future of their communities.