

A. List of Interviewees

<b>Organization</b>	<b>Stakeholder Category</b>
1. Fellenz Family Farm	Producer
2. Wickham Farms	Producer
3. Honeyhill Farm LLC	Producer
4. Gro-Moore Farms	Producer
5. Plato Dale Farm	Producer
6. Pedersen Farms	Producer
7. Partyka Farms	Producer
8. Merrimac Farms	Producer
9. Intergrow Greenhouses	Producer
10. LynOaken Farms	Producer
11. Lawnhurst Farms	Producer
12. Old Chatham Shepherding Company	Processor
13. Arbor Hill	Processor
14. Cornell Agriculture and Food Technology Park	Processor
15. Muranda Cheese Company	Processor
16. Lively Run Goat Dairy	Processor
17. Stony Brook Wholeheartedfoods	Processor
18. Allied Frozen Storage	Distributors/Warehouses
19. C.W. Cold Storage	Distributors/Warehouses
20. Farm Fresh First Inc.	Distributors/Warehouses
21. Genesee Valley Transportation	Distributors/Warehouses
22. H.H. Dobbins	Distributors/Warehouses
23. Headwater Foods Inc.	Distributors/Warehouses
24. Joe's Meat Market	Distributors/Warehouses
25. Leonard's Express	Distributors/Warehouses
26. Regional Access	Distributors/Warehouses
27. Sheppard Trucking Ltd.	Distributors/Warehouses
28. Williamson Cold Storage	Distributors/Warehouses
29. Good Food Collective	Distributors/Warehouses
30. Sysco (University of Rochester)	Distributors/Warehouses
31. Director of Campus Dining, University of Rochester	Non-Retail/Wholesale Marketers/Food Banks/Institutions
32. American Fruits & Vegetable Company	Non-Retail/Wholesale Marketers/Food Banks/Institutions
33. Attica Central School District	Non-Retail/Wholesale Marketers/Food Banks/Institutions

34. Wyoming County Business Education Council	Non-Retail/Wholesale Marketers/Food Banks/Institutions
35. Farm-To-Cafeteria, Cornell Cooperative Extension-Ontario	Non-Retail/Wholesale Marketers/Food Banks/Institutions
36. Foodlink	Non-Retail/Wholesale Marketers/Food Banks/Institutions
37. Genesee Valley Regional Market Authority	Non-Retail/Wholesale Marketers/Food Banks/Institutions
38. Good Food Collective	Non-Retail/Wholesale Marketers/Food Banks/Institutions
39. Green Acres Farm Market	Non-Retail/Wholesale Marketers/Food Banks/Institutions
40. Wayne Central School District	Non-Retail/Wholesale Marketers/Food Banks/Institutions
41. Butapub	Consumers/Retailers
42. Lento Restaurant	Consumers/Retailers
43. Muranda Cheese Company	Consumers/Retailers
44. Rochester Public Market	Consumers/Retailers
45. Sodexo (Monroe Community College)	Consumers/Retailers
46. Wegmans Food Markets, Inc.	Consumers/Retailers
47. Baker Commodities	Recycler/Composter/Waste to Energy Supplier
48. Noblehurst Green Energy LLC	Recycler/Composter/Waste to Energy Supplier
49. Seneca Energy II LLC	Recycler/Composter/Waste to Energy Supplier
50. Wegmans Sustainability Coordinator	Recycler/Composter/Waste to Energy Supplier
51. CH4 Biogas	Recycler/Composter/Waste to Energy Supplier
52. Waste Management, High Acres Landfill	Recycler/Composter/Waste to Energy Supplier
53. Community Composting	Recycler/Composter/Waste to Energy Supplier
54. Senior Sustainability Advisor, Rochester Institute of Technology	Recycler/Composter/Waste to Energy Supplier
55. C.R. Zornow, Inc./ Organix Green Industries	Recycler/Composter/Waste to Energy Supplier

## *B. Non-Transportation Issues*

A summary of issues identified by the food system stakeholders that fall outside of the transportation system scope of this project are provided below by stakeholder group.

### *Consumer/Retailer*

#### Organics

- It takes time for growers to convert from conventional farming to organic farming.

#### Regulations

- Strict food guidelines prevent business opportunities with many local farmers/bakeries.

#### Seasonality

- Short growing season—restaurants are busiest from October-May and slower during summer months when all of the freshest produce is available.

### *Distributor/Warehouser*

#### Business Climate

- Difficult to remain competitive with other companies nationally due to New York State taxes, Workers Compensation, etc.
- Government subsidies lacking for small farmers.

#### Financial

- Finding a willing distributor to get the products to market.
- Need to establish a year-round East Coast supply chain.
- Shelf life of local products is not as “high” as some imported items.
- Local producers find it difficult to compete with mono-crop farms in other parts of the country.
- Acquiring start-up capital.

#### Data

- Information on potential companies/customers that need rail transport and access to their transload warehouse.
- Information about locally-grown regional food consumption as compared to distance involved would be interesting from a distribution standpoint.

#### Facilities

- Small facilities limit storage capacity and require a turn-over of cattle and other animals at a faster rate.

#### Seasonality

- Unable to meet demand with a short growing season.
- Large buyers prefer year-round producers.
- Diversity and seasonality of locally-grown products.

### *Non-Retail Wholesale Marketer/Food Bank/Institution*

#### Financial

- Lack of access to proper equipment to sustain growers/farmers.
- Difficulty in coordinating with buyers.
- Access to New York City as a local market is challenging. Meeting demand at a competitive price point is a major issue—same goes for sellers/buyers in the Region.

## Cost

- Local food items are too expensive to meet local demand.
  - School district budget adds to constraint (e.g., purchasing local apples is preferable, but can be purchased cheaper from another state like Washington).
  - School districts must follow bid requirements and procurement process—as a result, cost is weighed heavily in decision-making process.
  - Policy-makers need to make considerations for buying local even if it's more expensive.

## Facilities

- Lack of distribution centers in rural areas.
- Need more warehouses and incubators to support new businesses.
- Processing is lacking; universities would like to do more with local meats, but not able to source antibiotic free, crate-free, humanely raised proteins. Hard-pressed to find those volumes.
- Lack of cold storage facilities affects distribution.

## Marketing/Education

- Outreach/education is missing to meet local food demand.

## Seasonality

- Short growing season doesn't meet the volume of produce needed for the Region.
- Need more processed and packed food items (e.g., processing plants).
- Schools are big consumers but are not in session during the high-growing season.
- Lack of year-round market and supplies as well as cost and quality of products.
- Having a local network that can deal with seasonality issues.

## Workforce

- How to hire talented employees and pay them accordingly.

## Other

- Product expectation and habit of consumers in regards to “eating local” and “seasonal eating.”
- Low-income residents have “more access” to health foods, but need more companies/organizations, like Foodlink, to assist in making those connections.

## *Processor*

### Business Climate

- Excessive tax burden is preventing the development of agribusiness.
- Municipalities are treating agribusiness as “commercial” enterprises.

### Costs

- Start up and running costs.
- Large scale versus small scale. Artificially low food costs are driven by corporate practices that prohibit better food from being produced. Small-scale farmers cannot earn enough money from their products to compete with industrially produced food.
- Lobbying by large-scale corporate food processors.

### Facilities

- Need more modern facilities for food production capacity across the Region. High-quality buildings are needed for food processing, which has unique needs such as health and regulatory issues. The food industry is becoming more technical.
- Better market/capacity for grape processing (e.g., need capital investment, like yogurt production).

### Infrastructure

- Sites with municipal wastewater treatment are needed to better move discharge (e.g., proteins not captured in cheese and yogurt making).

#### Location

- Being close to source of raw material versus the consumer. Hard to satisfy both. Not being close to the market in Upstate New York but close to the research (e.g., Cornell).

#### Marketing/Education

- Getting better recognition of New York State products, especially in the metro area.
- Does industry information reach local (small) processors?

#### Regulations

- Impact of safety regulations at Federal and State levels on small processors relative to large-scale operations.
- Over-regulation and control of all facets of business operation.
- Import practices
  - Not enforcing the same regulations.
  - United States and New York State allows foreign agricultural products, such as heavily subsidized cheese from France, Baltics, Canada, etc., to be brought into the market.

#### Workforce

- Training is needed for the food production workforce. Finger Lakes Regional Economic Development Council (FLREDC) has identified worker training for food processing industries.

#### *Producer*

##### Business Climate

- High business and employers' tax.
- Taxes are high on commercial real estate.
- Lack of support for farming by government—there is no safety net, such as a lack of affordable health care.

##### Financial

- Older farmers without succession plans in place.
- From the perspective of small growers selling retail products—need for continued development of retail outlets.
- Better business environment that facilitates farm to sell retail products.
- Should be growing high-value crops on the region's high-value land (e.g., not cow-corn or industrial corn).

##### Cost

- Food culture—quality doesn't matter; it's about how cheap you can produce it. People don't know what quality food tastes like anymore.
- Rural population is getting poorer. Therefore, seeking out "cheap food" from places like Dollar General.
- Retailers do not want to pay for high-quality food.
- Upstate farms need more affordable connections to New York City.
- Primary challenge is getting people back into the habit of eating at home—only this will make CSAs work.

##### Facilities

- Lack of local food hubs or CSAs.

##### Organics

- Organic production system is very different from other farms. Almost at times adversarial with conventional farms; attitude carries over to local outlets and grocery stores.
- Farms that use pesticides without regard to neighboring farms; the right to farm with chemicals is just as important as the right to farm without chemicals.

- More consistent funding for land grant universities is needed for sustainable farming. Land grant universities have moved to for-profit model and public dollars for basic research is not available. They do not study sustainable practices or organic farming; instead, looking at how fast the industry can be pushed, largely having ignored other ideas.

#### Regulations

- New York State requires price posting for concord grapes.
- Food safety/GAP certification—there is no guarantee that something can't happen. Any problem can be traced back to the farm and put it out of business.
- Questionable amount of encroaching farmland deemed "wetland."
- Consideration of farm serving as wedding venue, but regulatory limitations on use of local products.

#### Seasonality

- Develop more year-round production.
- Weather has become more of an issue; more extreme within the past two years.

#### Workforce

- Labor is a huge issue moving forward.
- Government makes it difficult to get seasonal labor for a reasonable price.
- Work ethic is no longer there.

#### *Recycler/Compost Processor/Waste-to-Energy Supplier*

##### Capacity

- Infrastructure lacking for organics recycling.
- Dairy farms are continuously under pressure to produce more; this creates more waste. The solution is creating more fertilizer—the right fertilizer.
- Food waste hauling trucks have specialty components. Need more incentives or grants to try new technology for organic waste hauling.
- Donation is a big opportunity; getting more perishable food to Foodlink is a challenge.

##### Costs

- Western New York has lowest landfill tipping fees in the entire country. This is a barrier to food waste recycling participation.
- Model of collection at curbside (e.g., "pay as you throw.")
- Reduce landfill tipping fees. Regional support is needed from municipal level.

##### Marketing/Education

- Need more participation from the business sector.
- Awareness around the use of organics.
- Education of food waste diversion—community starts to utilize and encourage growth. This helps to bring the costs down for everyone. More stops they can make, share the costs.

##### Regulations

- Change laws via the New York State Public Service Commission to realize digesters not only produce power and reduce carbon emissions, but develops an energy structure away from large plants (smaller plants are better for disaster recovery).
- Fees associated with food diversion will "push" people (e.g., mandatory organics recycling) through funding and regulation.

## C. Interview Questions

### Producer Stakeholder Group

#### Background Questions

1. When you hear the phrase “regional food system,” what does it mean to you?
  - *Similar to buying local and eating local. Grown and eaten in the Region.*
  - *Means production and processing capabilities and ability to get it to the consumer.*
  - *Locally produced food sold locally. The infrastructure it takes to do that.*
  - *Developing local at an affordable price.*
  - *Local is less than 100 miles, where people live and purchase, a purchasing area or food shed. Region is defined as New York State.*
  - *Food of the region, where food is coming from in the region.*
  - *As a local food producer that doesn't do commodities or other food products that travel long distances; it's always a local system.*
  - *All food produced, processed, transported, and consumed in the region. Northeast defined as region.*
  - *How it's grown and distributed.*
  - *No idea that it exists.*
  - *Horizontal and vertical integration of the region's agricultural products.*
  
2. Do you think it's important for more of the food consumed in our region to be grown here? Why or why not?
  - *From a business standpoint, keep money within the community. Should be done in terms of climate and the good ground that we have.*
  - *Good thing. People want to know where food is coming from.*
  - *Yes, to support local agriculture.*
  - *Market capacity in the Finger Lakes for dairy producers. Upstate Milk, distributed to region for years. Wegmans network, works directly with Upstate to produce fluid milk and some of yogurt, private label. Locally produced products that can be served year-round.*
  - *Absolutely. U.S. is net-importing country – 80% of all tomatoes grown in Mexico because of large distributors like Sysco.*
  - *Yes, it's important so that people know where food is coming from; keep the small, local guys alive.*
  - *Yes, look at cost of energy and transportation and quality of foods, monoculture vs. polyculture, locally sourced foods produced and consumer with integrity – from seed to consumer. Consumer is expecting just that.*
  - *Profitable to grow as much as you can, support local businesses and farms. But probably not practical, food people like that can't be grown here such as coffee, bananas, etc.*
  - *Yes, jobs for producers.*
  - *Yes, it's a good thing, personally. For the food miles issue and keeping employment locally.*
  - *Yes. First – environmental concerns. Fewer food miles mean less pollution. There are many issues with “traveling produce,” (e.g., bacterial infections, bug infestations). Second – the money for food produced here stays here. Other than the occasional vacation, most farmers don't get out much and spend any/all income locally. Third – wouldn't you want to buy from a person rather than a multinational corporation – wouldn't you like to know who's growing your food?*

3. Please tell me about yourself and how you have been involved in the local/regional food system.
  - *Small farm, direct market food and produce. 3-mile radius of farm. Involved with Ontario County Farm Bureau and other agricultural organizations with projects.*
  - *Grew up on vegetable farm in Ontario County. For last 30 years, small farm operation in Monroe County with wife. Direct to consumer. Grew up producing for processors. Now sells at consumer-level.*
  - *Operate 3,000 acre farm, table beets, peas, sweet corn and snap peas for processing.*
  - *Dairy producer. 24-36 hours from farm to consumer.*
  - *Sell at farmers' markets, Brighton, and several restaurants in the Rochester area. Rochester is not a farmers' market, it's a public market. Food is brought in; sellers are not sure where it came from. Brighton and Ithaca farmers' markets sell from producers only. Statewide beef, mostly Western New York, half of business in Buffalo area. Sell garlic nationally*
  - *Third generation farmer and retail farm market, father has been running retail since 1984, taken over retail front in past 5 years. Retail the produce, grow our own produce. 80% sold is grown on the farm. Uncle grows the actual produce in Rush. Cucumbers, tomatoes, fruits and vegetable, plums, grapes, retail garden center. No wholesale, produce is sold directly to consumer.*
  - *Dairy farm until 6 years ago, sold to nearby farm, kept 200 acres to farm in a different way with organic standard.*
  - *We've been farming since 1982, grew up on farm. Growing vegetables over the years. Wholesale. Vegetables and grain, hogs with partnership Keystone Mill.*
  - *Part-owner farm, fruits and vegetables, sell at farmers' markets.*
  - *Greenhouse operation, grown hydroponically almost year-round, small sized business to larger. Ship throughout Northeast, no farm markets, mainly retail and wholesale. 55 acres of greenhouses. Looking for flat land, electricity available at this location.*
  - *I am a third generation "agriculturalist" that came back to the farm after 20 years away. Our farm has developed an apple delivery program that currently services 90 locations in Western and Central New York with biweekly farm direct delivered apples and cider.*

### **Data and Information Gathering**

1. What do you produce?
  - *Fruit/vegetables. Wide range of crops, apples, peaches, pears, and plums. 100 varieties of vegetables. Some honey and eggs.*
  - *Extensive variety of vegetables. CSA program. June until October. Any vegetable in our climate on small scale, pumpkins, fruit, you pick apples in production.*
  - *Table beets, peas, sweet corn, and snap peas.*
  - *40 million lbs. of raw milk per year, two trailer loads a day. Five tractor trailers currently own. Everybody busy with their own trucks. More ability to know where the waste is. Biggest market is milk market in Penn Yan. Whey (milk yogurt) and buy products. 15 trailer loads a week, revenue service, tipping fee. Milk waste (8,000 gallons a week). Green story to tell. Electricity for farm, residence, and solids for bedding.*
  - *Grow garlic, not culinary, garlic seed business. Graded differently. Big order from California. Garlic is worth tremendous. The reality is that we should be growing high value crops on high value land. Carrots in the ground, harvest in spring.*
  - *About 15 varieties fruits/vegetables.*
  - *Grass-fed beef, animals based on pasture, chicken and egg production. Laying hens. Growing 8 acres of vegetables*



- *8 different types of vegetables.*
  - *Apples, peaches, strawberries, tomatoes, broccoli, cauliflower, blueberries, raspberries, cherries, lima beans, squash, pumpkins, peppers, cucumbers, grains, sunflowers, barley, wheat.*
  - *All tomatoes, beefsteak and tomatoes on the vine. No process. Own trucks and use outside carriers.*
  - *Apples, cider, peaches, tart cherries, and wine grapes.*
2. Where do you currently sell your products? How do you market your products (e.g., direct to consumer, whole sale, bulk commodity, cooperatives, export)?
- *Markets in Canandaigua, Pittsford, Brighton, and Geneva as well as farm in Phelps. Marketing done through social media. Used to do print, now utilize the internet/online guides. Word of mouth sales. Most CSA members pick up at farm, drop off points as well.*
  - *Produce sold to Bonduelle and Seneca Foods, Bergen and Leicester.*
  - *Sold to Upstate Milk Cooperative.*
  - *Includes chickens and tomatoes mostly (heirloom varieties). High value items.*
  - *Retail farm market.*
  - *Market at Niagara Frontier Food Terminal, chicken slaughter facility and facility for processing, washing, packaging, and storing. Marketed through local farmers' markets, 10 wholesale accounts (restaurants) and local food stores.*
  - *Wholesale – all in Northeast; New York, Pennsylvania, Massachusetts, some Connecticut.*
  - *Farm market at the farm, two roadsides stands, Wegmans, Tops, Big M Store, and farmers' markets.*
  - *Wegmans is one of their customers as well as Tops and Aldi locally.*
  - *25% of our products are direct to consumer with U-pick and store door delivery. 75% are packed through our local apple packing outlet and sold within the States as well as Europe and Israel.*
3. Do you add value to your products (e.g., sorting, packaging, processing, and storage)? If so, how?
- *Package the honey. Everything else is washed and sold like in the grocery store.*
  - *No, not at this point.*
  - *Grow and deliver. We do all the trucking.*
  - *No. Commodity.*
  - *Beef is obviously processed. Garlic flowering stalks, rare food. Tender in spring, mild garlic taste and it's pickled.*
  - *Haven't yet. All fresh at the stand. Different entities in the future, possibly freezing certain vegetables for more local crops to be available year-round.*
  - *Make available year-round participating in winters and summer markets, hydroponics in winter, microgreens, run high-tunnels into four seasons of production, different products, and using storage crops in summer and fall to supplement through the winter.*
  - *Package wash, store some things.*
  - *No, to keep prices in check.*
  - *Packaging in clam shells, but mostly in bulk boxes.*
  - *Yes. We have our own CA storage, packing house, and delivery trucks.*
4. Are there other products that you don't currently produce that you would like to? If you answered yes, what prevents you from producing other products?
- *Not right now.*
  - *Plate is pretty full, maybe in the future, maybe value-added in the future.*
  - *Looking at creating free market food stamp, tomatoes, sweet corn, and variety.*

- No.
  - *No, downsizing vegetables and upsizing garlic and beef. Hard to harvest and keep the workforce due to workers' compensation, etc. For two employees, \$1,200 – \$1,500 to do reviews.*
  - *Most certainly, blueberries. Just not enough time.*
  - *Pasture-based products, pork, dairy, sheep or goats. Along those lines, looking at that. Certain avenues in the future. Food terminal space, food hub, goal is to co-op space with other producers. Hope over time producers bring other products that we don't do, participate with us in that venture. Time and personnel, small farm, don't want to grow too fast. Production units that grows too fast. Growing pains from right investment, personnel, and time element.*
  - *No. Cut back and simplify.*
  - *No.*
  - *No, not at the moment.*
  - *Not at this time.*
5. Would you like to sell more products locally? What might help you accomplish this? What is the definition of local? Within 10, 20, 50, or 100 miles? To New York City?
- *Everything is local and retail-based.*
  - *All products are currently marketed locally.*
  - *Yes, we would. Preventing from do so? Local CSA to help market. Don't current have one.*
  - *Already local.*
  - *Of course. Selling everything we grow, but would need to add employees.*
  - *All sold locally.*
  - *Frustrations are local market here, need to go to city to sell product, mindset on organics, viewed as a threat, production system is very different from other farms. Almost at time adversarial with other farms, carries over to local outlets and grocery stores. Longstanding product just out of commodity chain to supply needs, cheap, defines food = whether it's cheap or not. Sell more locally, but the cultural locally doesn't line up with his farm's culture. Type of thought-process going into investment and land. In his area, price is relevant. For the price is everything (rural), doesn't matter about quality, it's about how cheap you can produce it. Quality of food has been impacted. Real quality to table, people are shocked, food that we bring is nothing that they have been eating. Flavorless beef, pulverized and think but no flavor, not used to flavor, used to other. Challenge. Potatoes, carrots, lots of vegetables bringing flavors, rural community doesn't have adventure for quality of food, urban community seek out more flavors. Economic – rural population is getting poorer; agriculture is designed to meet their needs, cheap food. Cheap products. Dollar General, example. Food is of the same quality. Meets the need economically.*
  - *Sell to whoever wants product at the price we ask. Ship more to New York City. Great more locally, being large wholesale, need to look broadly. Back up plans. Finding the trucking – less than tractor trailer loads that can be an issue. Partner with Red Jacket to ship with them. Pass cost onto consumer, still be affordable.*
  - *New York State, 50-100 miles.*
  - *Northeast to New England to the Carolinas.*
  - *Local for me means within a 500 mile radius and I would love to sell more in NYC – just missing the transportation link.*

6. Are you concerned about the rate that high quality farmland is being lost to development in your area? Are you familiar with the term farmland preservation? Have you ever considered working with a town, county or land trust to preserve your farm? What are the successes, challenges, and opportunities of farmland preservation?
- *Yes, land use policies. Highest and best use of ground. Not to his farm, but does chair the County's agriculture enhancement board. Volunteer position on governance board.*
  - *Valid concern. Population is growing, land base is shrinking.*
  - *Small amount in the County, prominent farmland agency that farmer helps with farmland conservation and easements, not as bad – but in northern part of county (Monroe County). Not always a bad thing, development, gives opportunity to landowner, for value-added to agriculture land. Ways to abate that.*
  - *No.*
  - *1/3 of the farm, 50 acres total, grasslands preserve program, deed was changed. Nearby quality farmland has been turned into residential lots. 30 residential lots since 1978.*
  - *No.*
  - *Huge threat to farmland. Purchase of large tracts of land, resources that they have--economics.*
  - *Not in this area, sold to farms in that area. Not much development in town we are in. farms heading into next generation, so good. No demand for that residential.*
  - *Yes. Best growing soils in the world, building houses on it, limiting food production.*
  - *Not applicable*
  - *I'm not concerned. We're kind of in the middle of nowhere and too far away from any city (an hour) to warrant the need for farmland preservation.*
7. Do planning and other regulatory mechanisms like zoning impact the food environment? How so? Have you heard about any rules and regulations like zoning that keep a food-related development from occurring? How so?
- *They do both sides of the coin, positive like Seneca and Gorham to try and balance preservation of farmland and profitable use. Towns like Victor and Farmington ignore farmland and utilize development.*
  - *Inhibits things might like to do, for instance, value-added, consider hosting wedding receptions, using own products, limitations with what can do with that, New York State regulations. Nothing impacting farm or retail operation. Fringe things that we do that make operation viable. More than just production, activities to make it happen. Local restrictions on that.*
  - *Absolutely, through right to farm and town's master plan, help stabilize land base for food agriculture in general.*
  - *Questionable amount of encroaching land deemed "wetland."*
  - *5-acre zoning to restrict people on individual lots. Sold off road frontage. Farms are behind there. First moved here, now industry and fast food.*
  - *Not in the areas that we farm, very rural. Not where retail market is set. Successful agritourism operation. Only problem is Cuomo raising minimum wage.*
  - *The total package per se is related by land-use issues, private property rights, limiting and allowing environmental things that are not good. It works both ways. Recently moved into a facility in the City of Buffalo, small amount of the building and the engineering required to install in a few outlets in a building, etc. It was an eye-opening experience. Farms can use all the pesticides they want, without regard to nearby farms. Spray-drift is allowed. Long-term the right to farm with chemicals is just as important as the right to farm without. Had an experience with a pesticide plane cleaning its nozzles right overhead, air-spraying. Affects testing, anything that is shows up (organic produce). Long-term issues will need to be addressed.*

- *Very agriculture friendly, on planning board, new comp plan and new zoning, help preserve Ag land. Town of Seneca.*
  - *No issues experiencing – just federal government, labor problem.*
  - *No, sometimes with local politicians regarding the definition of agriculture or industrial. Ag & Markets agrees with definition of agriculture.*
  - *I think fear of the unknown and Mother Nature keep more things from not happening than zoning.*
8. Do you accept food scraps to feed animals or for composting/landspreading? Does your facility have the ability to compost outdoors at your site? Do you have access to off-site composting?
- *No. Informal composting. Don't do it in a way to meet computing regulations – legal definition. Overall, do try to utilize waste products to incorporate into soil.*
  - *Informal composting. Own products.*
  - *A lot is feed to animals, dairy/beef animals, food scraps.*
  - *No.*
  - *Municipality composts leaves for free, 2-3 years and then use them.*
  - *We don't compost. Food waste/bad product, dispersed – give away to people who need more or those that wants seconds. No land spreading. Waste goes to landfill.*
  - *Compost a lot of things, vegetables wastes, slaughter waste, goes into compost depending on different applications, keep off of vegetable land, regulatory food safety, can't use certain animal waste on vegetable production.*
  - *Spread some, most from packing line goes to facility in Seneca Castle that composts.*
  - *Not a lot of food waste, second-day food sell at lower cost – unless it's really rotted, dump back into fields.*
  - *No.*
  - *Do not raise animals and no need for composting.*
9. A few questions about transportation:
- a. What highway facilities do you use?
- *NY-14, NY-5/US-20, 90, NY-96, I-490, I-590, NY-31.*
  - *Victor and Henrietta roads, I-90/NY State Thruway.*
  - *I-390/NY-390, US-20, NY-5, NY-19, NY-63.*
  - *I-90/NY State Thruway.*
  - *I-90/NY State Thruway, I-390/NY-390, US-20a, NY-15a.*
  - *NY-15 and 15a.*
  - *Roads around Arcade, Route 78, 290 around Buffalo, up into North Tonawanda, I-90/NY State Thruway.*
  - *We hire trucking out. I-90/NY State Thruway. Not sure where they go. Routes 5 and 20. And county roads.*
  - *I-390/NY-390, I-590/NY-590, US-20, NY-5, NY-104, NY-531.*
  - *I-90/NY State Thruway, NY-98.*
  - *Every roadway we can!*

b. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations?

- *No. Medium-sized delivery truck.*
- *None.*
- *Not locally, Erie Canal towards Albion, big concern. Limited places, bridges not rated for heavy enough loads. Erie Canal limits agricultural products.*
- *Very expensive. Thruway is unlike any other road in the country. Very expensive. One load every night goes to Albany, 35 ton. Transportation costs for New York producers the most as compared to the nation. Mainly because of Thruway. Buy grain, basis for grain, .50-\$1.00 a bushel as opposed to other side of Mississippi. More costs to consumer. Producers for global market, across the world. Product every day perishable. Lucky to have Upstate cooperatives to work with.*
- *Romulus – 72 miles, slaughterhouse. Smaller trucks. Deliver some beef too.*
- *None.*
- *No, under 12,000 lbs.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*

c. What rail lines and/or intermodal terminals do you use?

- *None.*
- *Inputs to vendors that we use, such as fertilizers.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*

d. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use rail lines and/or intermodal terminals.]

- *None.*
- *None.*
- *None.*
- *No adequate rail service, rail cars for fertilizer inputs only. Rail is the best way to move. Should be the cheapest way to move product. New York State is difficult. Time-sensitive. Too much of a monopoly. Trucking escalated 10-15 years because rail is not dependable. Competition with trucking, but not with rail. It's a New York State issue. Overweight permits are a money grab, 80,000 loads for waste/county roads. Weight is an issue, feed from Canada; weights limits higher, permits are expensive. Pay for roads, and then pay to carry the weight you can. 35 tons go down the Thruway every night, 7 days a week. It's only cost-effective with trucks running every day.*
- *None.*

- None.*
- None.*
- None.*
- None.*
- None.*
- None.*

e. What seaports do you use?

- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*

f. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use seaports.]

- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*

g. What airports do you use?

- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*

h. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use airports.]

- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*
- None.*

i. Describe any localized transportation issues you face in the area immediately surrounding your facilities. What potential solutions could be put in place to resolve these localized issues?

- No real issues.*
- None.*
- None.*
- None.*
- Feed is delivered for chickens – big trucks, 40 ton trucks. They might have issues.*
- None.*
- None.*
- None.*
- None.*
- Erie Canal bridges, weight limits.*
- We are at time hampered by bridges crossing the Erie Canal that cannot handle our weight loads. There are fewer and fewer being used these days.*

j. What institutional and/or regulatory issues do you face (e.g., oversize/overweight vehicle restrictions)?

- No large pieces of equipment.*
- None.*
- The Erie Canal bridges are of most concern.*
- None.*
- None.*
- None.*
- None.*
- Fees on the Thruway. Local trucks do the agriculture transportation.*
- None.*
- Not specifically.*
- None.*

## Closing

1. What are the biggest opportunities/advantages of the local/regional food system?
  - *Keeping money local. Providing local employment.*
  - *More and more consumer population has raised awareness of health and where food coming from source/grower. Our farm operation is focusing on this. Fad or trend? CSA continues to grow every year. Trick is certain level of commitment. Evidenced by fast food alley; families don't want to eat at home anymore.*
  - *Local food hubs or CSAs.*
  - *This project is an opportunity. You can act on behalf of production, etc. to help tell our story. Best productive land in the country. Best climate for agricultural production.*
  - *One farmers' market, Brighton market (Sunday 9-1pm), quality market, great community. Not a single customer in local neighborhood – never seen most of them. Never come out of their houses. More than 12 years. Our product is not one that suburban families want. Higher-income communities of Rochester. High-end restaurants, country clubs, Richardson Canalhouse. Local food, year-round just needed a venue for it. High-tunnels, greenhouses, unheated, ventilated on the sides, low technology. Actually can do 11-months, easily, 12-months. Carrots, beets, carrots, lettuce, not growing, you can store it. California, subsidized roads, no water.*
  - *Produce – keep traffic flow. Farm market trend is dropping, recuperating. Trend down with Walmart controlling 50% of produce industry. Wegmans does a good job of consumer retention. We make a living during 3-month period, May-June selling nursery stock and fall. Produce side is much slower.*
  - *Local system, lower cost of transportation and integrity for farm to consumer, stories to tell. Consumer wants to be very closely associated with food. Ability when we (farms) are local.*
  - *Good soil and have lots of markets not too far away, support system services, agriculture, trucking, equipment inputs, and farm communities' position to continue into future.*
  - *Best climate in the world for fruits and vegetables, access to greatest fresh water source in the world.*
  - *We like to think that customers appreciate locally grown as opposed to Mexico or Guatemala. Deliver fresh product within 24 hours.*
  - *We live within 500 miles of at least 7 major cities – I just need the right quality transportation.*
  
2. What are the biggest challenges that this region faces in terms of the food system industry?
  - *From the perspective of small grower selling retail products – continued development of retail outlets. Business environment that facilitates farm to sell retail products. Farmers' markets and local movement. Began in 2002. Farmers' markets bigger now than in 2002. In terms of being trendy and expanding, hit its peak several years ago. More flat now. Restaurant market – haven't looked at. Challenge would be to build a business to make money on. Sysco – sell more per store than we can. Transportation expenses. Roll that into bigger orders.*
  - *Challenge – healthy versus fast food. Primary challenge getting people back to habit of eating at home. Requires commitment to make CSA work.*
  - *Not great way to advertise locally other than radio (small/local). Have to go into other markets.*
  - *Young people leaving. Few years have gotten difficult for business. Transportation costs, everything has to be brought in. Public service commission, 20 digesters working in New York. Hire lobbyist to market green power.*
  - *Retailers don't want to pay for high-quality food.*
  - *Workforce – work ethic is no longer there. Labor is a huge issue moving forward. Land taxes for commercial real estate.*



- *Culture. Wegmans is great for local veg producers, but buys all grass-fed from Argentina. Fight over 75 cents a pound, mind-set, bought as commodities, produce sources, divertible sourcing, different mind-set two sides operate within the culture at Wegmans. Approached me, about veg side, different deal about meats, "local – Taylor Packing in PA." Local beef, charged \$\$, so-so flavor. Culture has to change. Farms on other side need to compete and grow, but work together to make vital system. Southern Tier of state, grassland poor soil lends to rangeland, real vital grass-fed system. Most farmers aren't looking at that, and most institutions not looking at that, economic sense. Planning, makes sense. Hill ground should have cows on it.*
  - *Weather. Been more of an issue in last two years, extreme in general. Made changes in cropping system. Labor continues to be an issue, government to get seasonally labor and reasonable price. Food safety, gap certified, no guarantee that something that cannot happened. Any problem, comes back to farm and puts out of business. Older, no good succession plans in place.*
  - *Labor issues, property taxes are high. Labor force that is not local, come in to work. Migrants, federal government making it harder to get migrants. Nobody wants to work.*
  - *Not different than anywhere else.*
  - *We need more companies concentrating in the shipment of produce within our radius. I don't know of anyone currently willing to do LTLs at an affordable price.*
3. In general terms, how much locally grown food that flows through your facility is exported from the state or country? In your opinion, how much locally grown food is exported from the state or country?
- *Not right now (regarding interest in selling outside of the Region). Would need reconfiguration of business. Growing marketing perspective. CSA programs is a focus.*
  - *All local.*
  - *Frozen at local processing facilities and shipped nationally.*
  - *Not applicable.*
  - *All local.*
  - *All local.*
  - *All local.*
  - *Not applicable.*
  - *Produce stays within New York State (sold to processors).*
  - *Wegmans distributes with its system. About 25% stays local.*
  - *About 30% of our apples are exported. I honestly don't know how much other produce is exported.*
4. Are you aware of any federal or state agencies that track this information? (For example, the apple marketing order tracks how many apples on-farm are sold as processing apples and fresh market apples, but not where they are delivered.) Do you have any suggestions for collecting this information?
- *First stop is USDA, then NYS Ag and Markets. Base numbers. Census of Agriculture. Filling out a lot of forms right now for USDA regarding fruit, vegetables, and honey. Production records are kept, year by year.*
  - *Not aware.*
  - *Not directly, traceable purposes for Bonduelle.*
  - *Less than 10% of total waste stream, Part 360 – permit for pick up. Deal to pick up, state relaxed the law.*
  - *No.*
  - *Produce markets—frozen produce? Local product, who grows it, customer service end.*

- *Federal pricing, organic pricing, track products and pricing appropriately.*
  - *Surveys from Ag and Markets and USDA. Labor surveys, take forever to fill out.*
  - *Sales and employee information. Use local and seasonal workers.*
  - *I don't have any other ideas but not really sure how relevant export are to our particular industry. Packing houses can tell you what you need to know.*
5. Do you collect data or conduct primary research on food or farming? If so, are you willing to share that data with us?
- *Market prices, USDA posts those. Trade groups provide other information.*
  - *Just own operational purposes.*
  - *No.*
  - *No.*
  - *Slow-food, international moment, started in Italy. Food country. Slow food dinner at our barn. All kinds of meetings for people, 40 people last Thursday from national organization teaching veterans to be small farmers. Catered lunch. Full of statistics about real food and clean food. Southern shore of Lake Ontario, largest apple growing region. But 90% of juice is from China. 80% of garlic grown in China. Contamination kills people. But Americans only want to buy cheap. Data is out there, just search for it.*
  - *No.*
  - *Not to any great extent.*
  - *Farm Service Agency, crops and acreage, SWCD waterways /tile lines, USDA pesticide use.*
  - *Not applicable.*
  - *No.*
6. When you think about the regional food system, are there things that you would like to know, data you wish you had or research that would help address barriers?
- *No.*
  - *Don't think so, more about market retention.*
  - *No.*
  - *Markets for electricity.*
  - *Corn or soybeans. Not sweet corn, 99.9% cow-corn or industrial corn. Low-quality, unproductive.*
  - *Try anything once. Something that we must do, business has to forever be evolving. CSA is a good thing for upcoming farmers who don't have the income to push it forward, to buy product. Don't want trucks on the road, fewer vehicles, less insurance (transportation costs). Don't have the time, not as many family members pulling weight. No succession plan, works 90-100 hours a week.*
  - *Universities have resources. Would like to see more consistent funding for land grant universities for sustainable farming. Land grant universities have moved to for-profit model and public dollars for basic research is not available. They do not look at issues with sustainable or organics, trying to look at how fast the industry can be pushed and have ignored other ideas.*
  - *Pricing, USDA collects pricing. Get into that online. Pin it down, no particular area. Centered on terminal markets, not wholesale market.*
  - *None.*
  - *No.*
  - *Not applicable.*

7. Who else should we be talking to about the local/regional food system?
- *Larger crop farms and dairies. Moving large equipment and transporting product regionally and nationally.*
  - *Various Ontario County farms.*
  - *None.*
  - *Hansen Farms, cabbage market, fresh market not for sauerkraut, ships across the country, shipped to California just recently.*
  - *Cornell people, small farm organizations, talk to NOFA-NY. Wegmans buys grass-fed beef from Uruguay. Hornell to Jamestown, acres of farmland that is out of production – could be raising cattle. We grow great grass in Western New York – why do we have corn-fed beef?*
  - *Various wholesalers, American Fruits, Brown’s Berry Patch, Green Acres.*
  - *Not applicable*
  - *Regional Access, American Fruit and Vegetable, FingerLakes Farms, LLC.*
  - *Kludt Brothers Inc., Spencerport Express.*
  - *New York Apple.*
  - *Not applicable.*

## Processor Stakeholder Group

### Background Questions

1. When you hear the phrase “regional food system,” what does it mean to you?
  - *The effort of local food systems working together to deliver to consumers.*
  - *One where you have a system built on a level of sustainability, not only have companies manufacturing, processing, and distributing products but have same category working closely with growers, to keep them informed and ahead of the curve such as specialty crops.*
  - *Combination of producers, distributors, retail stores, and consumers.*
  - *Growing, processing, distribution, and consumption of food. Embrace from one end to the other.*
  - *Means that we have a supply of food in the Region to be transported—however, it’s not getting around in the Region. There is disconnect between here and New York City.*
  - *First it means you have to identify a “central point” that defines the geographic center of the food system; a “food shed.” Secondly, a boundary about the center of mass of the food shed needs to be established, to delimit the food shed area. Thirdly, it means identifying all food locally grown and processed in that region—but does NOT include food imported into that region from any other source external to the defined boundary.*
  
2. Do you think it’s important for more of the food consumed in our region to be grown here?
  - *As much as we can, realizing that some of it needs to come from other parts of the world.*
  - *Important for food to be grown here for several reasons; consumers are demanding, consumers much more concerned about processing of food, not just organic or not but where it’s grown, how it’s processed, etc. When they know it’s coming from the Region, more confident in making purchases. Regional food systems importance, look at other regions of the country dependent on food like California, serious challenges for growers, lack of access to natural resources such as water. We don’t have the climate, but we do have resources and knowledge. New York State can become larger food provider for the State and the Region and part of country. We have the resources.*
  - *Absolutely—energy considerations. Vegetable production left New York State to California, some coming back, more beans, beats, items like that. Problem is not having the facilities. How long will drought in California last? New York State has economic advantage in rainfall.*
  - *Somewhat. Local growers and producers would benefit from increased demand if the market focused on locally grown. From consumption standpoint, doesn’t matter where a tomato comes from.*
  - *Definitely, big believer in full flavor, the way food is supposed to be. Ingest something that is beneficial to you. Healthcare system is messed up because of people’s immune system. Food system is homogenized, pasteurized, etc. Food should build the immune system.*
  - *ABSOLUTELY!! Locally grown food forms the core of a healthy economy both in terms of creating jobs and thriving small businesses and in terms of health, both personal (healthier more natural foods) and in terms of the environment being used in a sustainable way. It is ridiculous to be transporting food from such great distances when transport and energy costs exceed the costs of the actual food.*

3. Please tell me about yourself and how you have been involved in the local/regional food system.
- *Professor at Cornell for 34 years. Owns a dairy cattle farm in Cayuga County with dairy goat and dairy sheep, yogurt and cheese, some cow. Sheep yogurt and cheese business is unique in the country.*
  - *Originally from New York, grew up in Brooklyn, at a young age in the food business working in restaurants. Over the years stayed in the food business with various disciplines (corporate level purchasing, small business consulting, management and opening of small independent restaurants and retail in New York State) then corporate food service management in Boston. Last 8 years in Geneva working with Martin Farms, a family-owned farm in Brockport, on growth and specialty crops such as pumpkin seeds, hull less seed pumpkins that produces a seed without a shell. Sixth year in business, collaboration with Cornell University as a land-grant institution. Get news from them in terms of the food world, packaging, new crops, success stories with growers translate into opportunities for food processors. Eight years of developing and growing the concept, 4 years growing the hull less seed pumpkins.*
  - *Graduated in 1964 from Cornell, one of his papers, debated the question, “Why do we eat lettuce and pay for freight from California to New York?” Better off eating cabbage from New York as it’s more nutritious. Worked at Widmer Winery in Naples. Went off on own, 27-28 years ago. Grapes not in demand at time. Started out with a line of products that sell whole grape or grape juice or wine. Small way of helping the market. Since then things have changed; big problem in wine industry is limited allegiance to New York wine in New York State and food products in metro NY. Distance factor, general population more prone to imported products than New York products, same for wine. Biggest wine city is New York City, competition for people to sell wine. Wine industry working hard to change that. Believes in growing and producing what is supposed to be grown here. World taste – Riesling, Chardonnay, Cabernet Sauvignon. Disadvantaged with red varieties. On the plus side, New York is getting a lot of recognition from producers that are producing Riesling and Chardonnay of high-quality. Best Rieslings in the world. Grape production in New York has been static for 30 years. Production in California and Washington, 40-50% increased production. They can grow Riesling more efficiently, but not the same quality. Economically more viable. New York has made some mistakes, Western New York with Concord grapes, very predominant, grape juice biggest cooperative is Welches. Free market, growers in Western New York have gotten beat up because cooperatives don’t have to post a price, free market not posting price. New York had more Concords than Washington, but Welches has plants there now. New York set pricing law, processing post prices to growers, then New York no longer in Concord production. Other areas that don’t have to post prices, Washington for example, are more advantage to processors. They can wait until market rate determines that. Grape juice processors moved out of Western New York. Cost of business in New York is high, disadvantageous of posting prices. Now there is a limited market for concords in Western New York. Revisit that and annul the law. One of the reasons processors moved out of New York. Grape juice grapes – why pay more \$\$ in New York than in Washington.*
  - *Manages a 72-acre incubator site that helps small food, agriculture, and beverage companies develop. Supports underlying technology in the development of food products or processing. Currently houses 10 tenants. Biggest tenant generates \$1-2 million a month. Another tenant with a thousand dollars a month. Broad representation, entrepreneur businesses in the agriculture, food, and beverage arena. Another tenant is a software company, point of sale for wineries, supporting the industry with this system. Finger Lakes Wine Alliance, another tenant, represents the wine industry, market-development.*
  - *First generation dairy farm, cheese making eight years ago, began as a hobby. Now 2,500-3,000 lbs. a week. Distributing themselves to wineries, small specialty stores, 150-mile within farm in*

Waterloo. Tasting room everyday open. Conjunction with wineries and tourism—cheese compliments what we do here in the Finger Lakes.

- *I am a co-owner of a goat dairy. I have been involved in the production of local food and small scale sustainable agriculture practices for more than 20 years.*

## **Data and Information Gathering**

1. Please describe your processing facilities and activities; what you're processing and at what volumes. What is your business structure (e.g., LLC, corporation, cooperative)?
  - *Our company processes sheep/goat milk, east of Albany. Will relocate into Finger Lakes. Sheep farm is here, Cayuga County. Finger Lakes Region in 2016-18. Make sheep yogurt and cheeses. Corporation is a 4 million dollar business, half of which is yogurt.*
  - *We are a manufacturer that produces food grade oils in terms of category. Oils made from squash and other regionally grown seeds, flax seeds. Processing done there. Annual produce 4,000 gallons of oil. Small scale oils that markets best serves natural food retailers and specialty markets. Higher price point retailers. Manufacturer and wholesale, seeds into facility for bottling and packaging and shipping wholesale. A lot of production under one roof. Small distributor, Regional Access, working with them for about 8 months. Facility – Ag Tech Park, adjacent to experiment station, not affiliated with Cornell, but people think we are part of Cornell University. Independent entity, just a collaboration with Cornell. Current facility is at capacity. Interest in other small manufacturers looking for office and location, but anything beyond that modest we are at capacity for several years, question of funding. Effect on them to expand facility – one other manufacturer, prime tenant is at full capacity. Negative affect on ability to keep up with orders, need is there, funding is a challenge. We find space in building that they can operate and expand with, but down the road, bigger challenge for them.*
  - *Sell gourmet foods in limited way in 28 states. Lose about 8-10 per year. Market gets smaller and smaller. Proliferation of gourmet foods, growth market is declining, more products than used to be, transportation costs. Free freight? 45 lbs. cannot be free. Need high-profit margin, not on food items. Transportation costs going to continue increasing. Long-term, being able to sell in a wider geographic area. This trend is not stopping. Conscious effort to sell within local region. Specialty food, higher costs to consumer. Big trend to clean labels! People aren't (due to economic times) willing to pay the extra. Negative effects of big retailers, people have traded down somewhat. Jam, dressings (black raspberry), blueberry poppy seed, wine jellies, wine syrups (dessert topping), balsamic vinegars from scratch. Distinctive advantage – New York Wine Culinary Center buys balsamic vinegars because it's made in New York. Organizational structure to buy New York products as long as they can. Wegmans is going private label, local in produce – shelf/stable products, not as local as they can be. Small batches – co-packing with other facilities. 50 food specialty products/20 wine products. Making grape juice, requirements from State and USDA (HA-CCP) hazard guidelines, food safety program. For a small processor, hard to do those things. Deficiencies in write-ups, Ag and Markets inspection, Health inspections. Grape juice is very particular. Making some in-road in the Canandaigua Wegmans store with concord or purple juice.*
  - *Tenants are processing: two actually make something, Cheribundi and Stony Brook WholeHeartedFoods. Both companies draw heavily from locally grown produce. Largest consumption of sour cherries in New York. All production is in the building. The tenants own the equipment, start-up mode sometimes with equipment, forklift is owned by the Ag Tech Park. Would have to buy in other typical space. Provide own equipment. Two new tenants, hard cider, own equipment, other tenant is making fermented tea product. Still in startup-mode. Cheribundi*

*is a good example, at 9,000 sq. ft., more space, leave incubator building, need real space, trying to find funding for another 40,000 sq. foot building, Cheribundi is approx. 75% of incubator building. Need another building for them. Business model adhere to. In this area, on this general site. It would require more buildings. Sour cherries, nutritional abilities, Cheribundi is benefiting from best product on market in terms of quality. 125 sports teams as consumers, most of NFL and professional/NCAA teams. Patriots had an emergency order of 20 cases of juice before Super Bowl. Helps with inflammation in the body, arthritis, nutraceutical benefits. Sold at most of major retailers.*

- *Fifteen kinds of cheese, but known for cheddars. Asiago, Provolone and Blue Cheese, smoked cheese. Three of four groups of cheese. Don't make the cheese on the farm. Aged here, milk sent to Cooperstown where the plant is. Not enough good infrastructure close enough to the farm. Our business is growing 20% a year. Plenty of milk. Baby steps, 4-5 part-time helpers and wife works full-time on the farm. Several aging cells – 18-tons currently in the aging area. Aged is about 60-days. Pasteurized, can sell in 2-weeks. 3 years old cheese this fall (oldest). Average aging is 5-7 months, youngest is 120 days. 5-7-months to a year. Always adding aging space.*
  - *We produce milk and artisanal goat and cow cheese. We are micro-farm operation with an annual production of around 50,000 lbs. of cheese. Our current business form is an LLC.*
2. What is the main market for your product (e.g., local, regional, state, national, international)? What are your marketing channels; wholesale, retail? What is local?
- *Wegmans and Whole Foods, all through the country. Murray Cheeses, on a local basis, sold through retailers/niche markets.*
  - *Majority of business is in the Northeast, New York State and New England. Opportunity to work directly with retailers on wholesale basis, not a solid distribution network, we are self-distributing, cannot go into a region and get into every Walmart but can work with retailers throughout the United States and Canada. 70 different retailers directly to wholesale, Canandaigua to British Columbia. Stores fall under specialty/natural food stores that are seeking foods produced naturally, non-GMO, organic, transparency in sourcing raw products. Small company, we have rich network of retailers and into Canada and East and West coasts.*
  - *Specialty food stores (biggest loss of market), farm markets, pharmacies. Need to ship pallets. Ship whole pallets to California.*
  - *Cheribundi is national. Other products, Stony Brook, squash seed oil, maybe nationwide but heavily local.*
  - *Retail store. 70% of sales in the store, used to be 56%. Open year around shop. We describe cheeses. Very similar to wine tasting, but with cheese. Advertising campaign on wine trail, word of mouth. Sign on New York State Thruway—heavily visited.*
  - *Local (Tompkins and Seneca Counties) and Regional (Finger Lakes and New York State in general).*
3. What is the main market for your acquiring raw product (e.g., local, regional, state, national, international)?
- *We produce product/milk.*
  - *Martin Farm, Brockport for a majority of the product, smaller farms for a diversified product steam. Small line of sunflower seed oil, working with a small farm in Clifton Springs (conventional sunflower seeds). Actively working with other farms in area, new seeds for new oil production. Lake View Organics, owned and operated by the Martens, really innovative, business in 2<sup>nd</sup> generation, a lot of specialty crops, organics, grain and produce (squash and pumpkin).*

- *Yes, we grow grapes and purchase some from Randall-Standish Vineyards. Grow grapes and process grapes for winemakers. We sell juice to wineries in New York. Sell some to big processors, but limited. We do value-added ourselves.*
  - *Most comes from the Region: Yates County for the cherries and Martin Farms in Brockport is the source of squash and pumpkin for Stony Brook. Apple cider tied into Red Jacket, using a lot of local apples.*
  - *Vertically integrated. Milk is produced on farms.*
  - *Local.*
4. Do you think having facilities available to process value-added foods is a major need if we are to grow more of our own food here in the region? Why or why not? Do you think it would be good to have more of the food that is produced in the region consumed here? What is the limiting factor that is keeping this from occurring? Is there a sufficient number of processing facilities in the region that could process and market locally grown food?
- *Own facilities, can do value-added. Major investment, 3-4 million for new facility. Available capital to have facilities to process finished products. Vegetables are easy processing, yogurt and cheese more involved with food standards—requires more capital investment.*
  - *RLF for City of Geneva, applicants that come in, ¾ of companies looking for financing to start/grow companies are food-based. Challenges of finding facility to work on, they don't have the financial assets but have the idea and marketable product. Region that had a lot of large employers, Kodak, not in food business, employ 1,000 of people but not employ fraction of that, areas like Geneva, scattered throughout New York State towns and villages with empty facilities and spots for opportunity for small-level food manufacturing. Some are picking up on. The point where no longer have large employers (dairy manufacturers) sustainably on state level, need to provide opportunity for small entrepreneur innovators that need assistance and guidance by stakeholders to manufacture in a safe food-approved environment. Geneva alone, nominally invested and food-certified safe, food innovation centers, incubators, emerging from homes and working on food products. Boston and New York City are no longer viable options for those people, crowded too expensive and not feasible. We have the opportunity of millennials looking for new homes, where they want to live and participate on community-level. Provide food innovation centers, access to facility, Ag and Markets approved, some interest by Cornell University as land-grant institution, allows individuals to get going on the next level. Synergy allows springboard to get to the next level. Providing next level of support throughout the Region. Financial constraints to build and operate buildings.*
  - *Price has not changed for grower in 30-years. Change of taste, Lake Niagara taste has gone down, one example of what's happening to viticulture. Very difficult. Mechanical harvesting, back in the 90s, first harvester 1988. Co-packing for a number of people – requires fancy equipment. Equipment for small batch. Not economically viable.*
  - *Cheribundi, co-packing in New Jersey, don't have the space here. Stony Brook does all packaging/labeling here. Land is ready 70-acres/sewer, water, everything. Need \$5 million for the building.*
  - *Hand cut and wrap. Wegmans larger stores, buy it for \$2-3 per lb. Dairy farms, sells milk by what government sets price out. Farmer gets least amount of money. Eliminate 2 people (producer and consumer). Good food, need to pay for it. Region understands and embraces that. Supermarkets haven't come to grips to paying for it, but wants to charge for it (\$\$). People selling it makes the most money. Needs to be in places with infrastructure for waste treatment, methane digesters. Could process cheese in Geneva, can't do it on farm—not enough space or infrastructure to handle it (e.g., power, water).*



- *Yes, it is important to have local facilities to process local food. More processing facilities means greater economic conduits for production and marketing of food. We need more food grown locally for many reasons; food safety, healthier food, job creation, sustainable agriculture, safer environmental practices, etc. etc. There are many barriers – here are a few;*
  - (1) Immense startup costs*
  - (2) Artificially low food costs driven by unsustainable corporate practices that prohibit better food from being produced because small scale farmers cannot earn enough money from their products to compete with industrially produced food.*
  - (3) Total lack of support for farming by government – there is no safety net, unaffordable health care to name one.*
  - (4) Very toxic and discriminatory business climate with excessive tax burdens preventing the development of agribusiness. For example, code officials treating agribusiness as ‘commercial’ enterprises and forcing compliance with building codes on farms that are the same as for commercial structures, etc.*
  - (5) Over regulation and control of ALL facets of business operation. In reality, there are so many obstacles to developing processing capacity locally, and growing the regional food system, that it would take serious time and research to quantify them all. The overall trend is very negative, and dangerous, despite the fledgling emergence of CSA’s, etc.*
  
- 5. In your opinion, what makes the processing in this region different from other regions?
  - *Not sure, if different.*
  - *Natural resources, not crowded/expensive, access to sourcing. Challenge of New York City and Boston, more affluent population. Challenge is raw sourcing. Closer to sourcing agent, see the growth of Chobani, etc. large-scale manufacturers, getting closer to the sourcing.*
  - *Plants have left – production has moved to producers. Raw product moved away, probably deficient to begin with. NY is now #1 in production in yogurt. Those plants are all new. Good for long time, those companies made capital investment to make yogurt, good for dairy farmer, not pull stakes, will stick around. Same thing for grape processing, better market. Farm consolidation. Big companies bought smaller companies. Very big or very small.*
  - *Product specific because of what we grow example, cherry juice or cider company than other places in the country. Being close to sources of supply versus close to consumer. Hard to satisfy both. Unique to Geneva is the location of Cornell’s Agricultural Experiment Station. All research in food, beverage, and agriculture. Companies tie into Cornell research. Product, processing, help them to “grow up,” give guidance, expertise. Not being close to market or source of supply but to research. Cheribundi, originated at Cornell, would not be in business if not for Cornell.*
  - *Great infrastructure for the raw product, no good infrastructure to process raw product. Power and water (infrastructure not enough). Manufacturing is good, not enough digester plants that want to do on an artisan level (as opposed to large-scale). Quality of food to eat, where it comes from, feel good about it.*
  - *Not sure. I have not processed anywhere else. Although, I know from discussions there are many other regions in the nation with far better business climates for emerging agribusiness to develop. New York is one of the worst places to attempt to do business and I continually recommend to young people to leave the state, if they seek to be successful.*

6. Thoughts about reduced, or better, food packaging and its role in food waste? What are other sources of waste from food processing and how does your facility manage its disposal?
- *Our facility, water from milk and whey. Looking for site with municipal wastewater treatment to move onto discharge. Proteins not captured in cheese and yogurt making.*
  - *By product (plant-based) high in protein, currently consumer and purchased 100% by farms using it for high-value animal feed. How consumers being more particular in food- but how animals are treated and feed. The byproduct from oil processing going to farm in Newfield, blending into animal farms that care about what they are feeding animals, plant-based high protein, not only at zero waste, can't keep up for demand of by-product, selling it and applying a product not readily available on the market, locally-made, and sustainable, that is being produced with raw products from New York family farms.*
  - *We don't. Our product is grape juice. Skin and seed along with pressing aide comes out of process semi-dry. Not large enough for waste-water system, if did, out of business. Clean up water. Restaurant business, use onions for sauerkraut, fresh onions, cut and chop – waste but all goes to landfill. Small enough that it doesn't matter. Very little waste from wine, liquid waste, add to the land.*
  - *Biggest waste is cherry skin and pulp. Struggling to find solution, hate sending to landfill, how to capture and make useful. Being fed to animals? Also find someone to take cherry pits and convert to fire building product for stoves. Trying to find purposes. Mainly to avoid disposal charge. \$25,000 for hauling stuff away. Motivated to find a place for it. Cardboard gets recycled. Stony Brook, process roasts the seeds and then presses them. Waste product is the fibers left from seed. That goes to some purpose, not thrown away. Fed to pigs?*
  - *Aging, no waste. Rind cut off, here and there. Feedlot for swine. Very minimal. Chickens and goats could eat it.*
  - *Food Packaging systems and methods are exceedingly wasteful and costly. They are driven by two main factors: (1) Regulation and (2) Corporate Competition. Safer better, food, without wasteful packaging will never be possible in the current climate of cheaply processed industrial food, and the regulatory system which supports it.*
7. A few questions about transportation:
- a. What highway facilities do you use?
- *I-90/NY State Thruway, I-390/NY-390, I-490, I-590/NY-590, US-20, NY-5, NY-20A, NY-96*
  - *We self-distribute, 96 down to Ithaca (Regional Access), work with FedEx and UPS, not driving those trucks, New York State Thruway, all Rochester routes and 5/20 being used to do deliveries to local wineries and retailers. I-90/NY State Thruway, I-390/NY-390, I-490, I-590/NY-590, NY-14, NY-20A, NY-33, NY-96, NY-441, NY-531.*
  - *Grape juice sourced in the Finger Lakes. Majority of grapes within 1 ½ to ½ circumference. According to the ton. Growers get grapes to use. Grape juice goes out retailers. Otherwise going to farm wineries and other retail locations for juice and wine. Self-distribute the wine in the Rochester market. Liquor stores and food products to justify trip to sell more things. Selling, taking orders, do delivers, and then sell more. Naples, Canandaigua, Victor, Farmington, Rochester..*
  - *I-90/NY State Thruway, US-20, NY-5.*
  - *Trucking service, milk hauler. NY State Thruway to 28.*
  - *We use numerous routes throughout the Finger Lakes Region.*

b. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations?

- *Fix the pot holes.*
- *Adverse weather conditions, only limitations. Distributors and carriers get the products where they need to go.*
- *Taking product to New York City—hard to ship small quantity and not increase price. CCE/Taste of NY Market in Dutchess County. Taconic State Parkway, Poughkeepsie. Freight, less expensive way, just to ship UPS. Green market in New York City – have to go in order to be advantageous of the system.*
- *All trucking.*
- *None.*
- *The biggest problem is not routes – it's the lack of affordable distribution trucking. This is a complex problem. Perhaps it could be solved with a central trucking hub/facility owned as a giant coop by many food producers. All could share the costs – but this hub would have to have a deliver radius large enough to cover the furthest point of all coop members. It would also have to reach all coop members clients, in a fair and timely manner. It may be a problem too costly to solve. Another, option would be for a food processor coops to gain access to a jointly owned places in the New York City Green market – the Green Market would have to relax their discriminatory policies that seriously punish upstate. The only people who can steadily access the Green Market are those close enough to do so. New York City is a STATE market – and why do only farmers close to it have affordable access to the Green Market ? The rules should be changed to allow food producer coops from Upstate to have spaces jointly so trucking costs and manpower costs to man a single coop space could be shared by several farms in a coop. Stop the New York City discrimination against UPSTATE!!!!!! Create realistic possibilities for us to have fair, equitable, and non-discriminatory access to the New York City market which is a resource for all of us. We are robbed by taxes to support downstate and denied fair access to the market that our tax dollars subsidize.*

c. What rail lines and/or intermodal terminals do you use?

- *Near Albany. When we move to the Finger Lakes, rail terminal will be used. Move a lot to New York City, will use rail.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None (use of such facilities would be beyond what we consider to even be a local or regional food shed).*

d. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use rail lines and/or intermodal terminals.]

- *No limitation.*
- *None.*
- *None.*
- *This building is not set-up for heavy production, too much trucking at back door. New building will need proper loading docks. Forklift and shipping bay right now. 95% of the output is by Cheribundi.*
- *None.*
- *None.*

e. What seaports do you use?

- None.*
- Port of Rochester. Some of the equipment used in production is imported. We had equipment come in to the Port of Rochester from Germany, Hungary, Austria. Doing it again soon. Crops are so new, the harvesting and processing of these products is also new.*
- None.*
- None.*
- None.*
- None.*

f. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use seaports.]

- None.*
- None.*
- None.*
- None.*
- None.*
- None.*

g. What airports do you use?

- Use Albany and Syracuse now. Will be using Syracuse and Rochester and Buffalo. Creamery. Sales force will be traveling, Albany and New York City.*
- Greater Rochester International for business trips to Europe. Connecting flights. Rare occasions to Logan and Kennedy.*
- None.*
- None.*
- None.*
- None.*

h. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use airports.]

- None.*
- None.*
- None.*
- None.*
- None.*
- None.*

i. Describe any localized transportation issues you face in the area immediately surrounding your facilities. What potential solutions could be put in place to resolve these localized issues?

- None.*
- None.*
- LTL – less than truckload, tea concentrate, candy items such as grape flavored gummy bears and twists. We bring in pallets of those from Minnesota. We put the label on and distribute. Freight consolidator to do that. Able to cut price in half, sometimes even more.*
- None.*
- None.*
- None.*

j. What institutional and/or regulatory issues do you face (e.g., oversize/overweight vehicle restrictions)?

- None.
- None.
- None.
- None.
- None.
- None.

## Closing

1. What are the biggest opportunities/advantages of the local/regional food system?

- *Challenge is population density, push our products into those areas (New York State, Boston). Presents its challenges with working with a distributor, distributor pricing, lowering your cost per items. Get your product into New York City. Processing costs, sourcing, are less expensive. To produce jar of kimchi, is costing less here than in Brooklyn. To get it manufactured, it's moving at glacial pace, but we do have a population that is emerging that is comfortable with living in an agrarian community, moving in opposite direction. Brain drain, leaving not coming back.*
- *Getting better recognition of New York State products in New York State, especially metro New York. Industry information - is it reaching local processors? Information vacuum within industry itself. Opportunities; how do we fulfill them better? Sell more in New York.*
- *Role of food in people's lives, more interest in input, history, processing, beneficial is processing, as a result, more interest and demand for local product. Not something the big food guys are good at, "stirring something," market is definitely shifting in origin and how it's processed, small manufactures getting into the process, this was not happening 15 years ago. Region is one of biggest "breadbaskets" in the country, produce is generated and real advantages to processing, for example the tomato business, change the way tomatoes grown because of shipping. Thick skin tomatoes to survive transport to processing facility, facility changes underlying product, not having to alter characteristics of input to address processing need, long-shipping needs and how local can shape it.*
- *Great ability to produce the food here. But in order to produce, you need labor.*
- *Currently, in my opinion there are more disadvantages involved with entering the realm of local food processing in New York State than advantages. Realize I am making a distinction between food production and alcoholic beverage production. I would not recommend to any young person starting out to attempt food production in New York State (alcohol is a completely different economic question). Emerging farmers (food producers/processors) are best advised to seek other states/regions to pursue any form of agri-business or vision of local food production.*

2. What are the biggest challenges that this region faces in terms of the food system industry?

- *Taxes are high on businesses and employers taxes. But we are located here, will make it work. There is a support system from state and local governments.*
- *Looking forward to that trend reversing, moving in our favor and will continue to move in our favor.*
- *Production capacity and facilities across the Region. High-quality buildings for food processing, unique needs, health and regulatory issues, getting more technological. Need more modern facilities for that. Workforce, lower-skilled workers, showing up as workforce is growing, but not sure how it will shake out, training?? FLEDC need for worker training for processing industries. How much help being provided to people for food processing training?*

- *Labor force put into place if people are willing to do it. We rely on outside laborers. Food production circle—it's hard work. Passion is lacking.*
- *By far, the biggest challenges we face are:*
  - (1) Over regulation by ALL levels of government in a business environment that is actually toxic, and driving many of us to leave New York all together.*
  - (2) Very destructive import practices whereby the United States and New York State allows foreign agricultural products such as heavily subsidized cheese from France, Baltics, Canada, etc. to be dumped on our market, artificially pushing down the market value of those products to levels so low that they become unsustainable for local and regional producers to compete with based on REAL costs of production. American agricultural food producers/processors play in an open market against foreign competitors who are subsidized, with NO support or help from our own government.*
  - (3) Unfair competition from import products that do not meet the same food safety regulations that domestic products must meet, even though the 'unsafe' foreign product sits side by side on supermarket shelves with 'safe' domestic product.*
  - (4) Unfair business practices and lobbying by large-scale corporate food processors.*
  - (5) Disproportionate impact of severe food safety regulations at Federal and State levels on small processors relative to the billion dollar cash flow of corporate entities that can afford compliance. These regulatory practices are blind to scale as well as real and tangible risk levels and completely discriminatory and destructive to the emergence of sustainable and healthy regional food sheds.*

3. In general terms, how much locally grown food that flows through your facility is exported from the state or country? In your opinion, how much locally grown food is exported from the State or country?

- *Products all over country. Sell to California. 30% is exported out of New York State.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Exported out of country – 0%, exported out of State less than 5%.*

4. Are you aware of any federal or state agencies that track this information? (For example, the apple marketing order tracks how many apples on-farm are sold as processing apples and fresh market apples, but not where they are delivered.) Do you have any suggestions for collecting this information?

- *I don't know.*
- *Other than licensing, annual inspection by New York State Ag and Markets. On the Federal registry as food producer because of bioterrorism.*
- *Not applicable.*
- *No, not keeping track.*
- *No.*
- *Not aware of any.*

5. Do you collect data or conduct primary research on food or farming? If so, are you willing to share that data with us?

- *Do our own development and research through Cornell for dairy products. Cornell University is an excellent resource.*
- *Not applicable.*
- *Not applicable.*

- *Not applicable.*
- *Inventory – savvy, lack thereof. Out the door faster than can be counted.*
- *No.*

6. When you think about the regional food system, are there things that you would like to know, data you wish you had or research that would help address barriers?

- *Being connected to Cornell, 30+ years with state system, unique knowledge acquired. Others local in careers do not have the knowledge infrastructure. Advantages of career job. Majority may find the system too overwhelming.*
- *Trying to find the data, it's out there.*
- *Not applicable*
- *Funding and workforce training is a critical factor for companies and success. Lower-paying type of work, food production, companies need to redefine food production line, pay more for skill and experience. High-turnover, typically companies over look turnover rate, better to keep employees in place.*
- *Better network to people that want the food. Don't need to import anything. We need to be able to get it to New York City for a reasonable rate, transportation is lacking.*
- *There should be serious research done on the very damaging and disproportionate effect of food safety regulation on small scale processors. New FISMA requirements will likely delay or prevent further development and growth of regional food systems. Secondly, there is a large body of information about the increasing average age of the "farmer." The loss of farms, farming, and farmers and the continued creation of a corporate pyramid food system is of huge risk to the food safety of the nation as a whole. Further research needs to identify changes in food policy, food safety regulations, and land management policies to reduce the serious and insurmountable problems faced by those who seek to become farmers and food producers for sustainable local and regional food sheds. The lack of understanding and the destructive policy of our governments and decision makers is appalling and we are facing what will eventually become a food crisis.*

7. Who else should we be talking to about the local/regional food system?

- *Nathan Rudgers, Director of Business Development, Farm Credit East.*
- *Martin Farms and Lake View Farms.*
- *LiDestri Foods.*
- *John Noble and Brian Nicholson, Red Jacket Orchards.*
- *Dr. David Galton.*
- *After research is complete quantifying the effects of public and regulatory policy on development of regionally sustainable food, an informed and aggressive dialog needs to be aimed at lawmakers to change the destructive policies that are destroying sustainable agriculture.*

## Distributor-Warehouser Stakeholder Group

### Background Questions

1. When you hear the phrase “regional food system,” what does it mean to you?
  - *It’s a system that covers a small area, 75 mile radius of distribution of food from producers to consumers.*
  - *Sounds like something like a Foodlink or some other charitable organization that gives food to the poor.*
  - *All facets that are part of the food cycle from growers, transporters, and everything between.*
  - *It means growers, manufacturers, and consumers in the context of food consumption.*
  - *Local.*
  - *Regional, Northeast, New York region, aggregators, distributors, logistics, farmers, producers, connect the retail, institutional buyers—a single web.*
  - *Transportation and food hubs from the Region from farmers to consumers.*
  - *Aggregating food in your region.*
  - *Don’t know.*
  - *Nothing.*
  - *From seed to growth, farming, processing, etc.*
  - *Means trying to get local farmers to get locally grown produces available to regional restaurants and other consumers.*
  - *Distribution of both local and non-local food and food services within a geographic entity.*
2. Do you think it’s important for more of the food consumed in our region to be grown here? Why or why not?
  - *Yes, jobs. Also we have better soil than in other areas, healthier option.*
  - *Yes, I believe so, being a cog in the whole machine, when agriculture does well here, it produces jobs, government tax revenue, etc.*
  - *Not sure how to answer that. I would just say that soil and weather determines what the Region is able to produce in a particular growing cycle.*
  - *Somewhat, locally grown helps local economy, generally fresher. By the nature of climate, limits certain crops.*
  - *Yes, helps the local economy.*
  - *Yes, our Region has a difficult time to have a year-round supply chain, currently trying to produce an east-coast supply chain. Benefits in pulling produce from across the country and the world (e.g., tropical fruits, pineapples). Staple crops that are being grown here should be working with farmer to purchase from local source.*
  - *Yes, to eat local and eat with the season, transportation can be limited. Preference to eat something 20 miles away. Also, helps the local economy.*
  - *It helps the local economy, cheaper to access food locally and more of that money goes back to local.*
  - *Yes, to help the local communities, economy, and farmers.*
  - *Not important to me.*
  - *Yes, it is. It is currently being done, not more can be produced at current level. Anything that is produced locally, we try to sell locally. Production side is producing at max, if consumer is choosing to go elsewhere and it is available locally, then yes it should be purchased locally. Prime example, New York State produces more apples than it consumes, certainly Western New York produces more apples, we should not be importing apples from Washington State. That’s not a*



*production issue, more of a sales and consumers issue. We don't have any acreage of farmland not being farmed. Everything is being purchased locally if it can be.*

- *It's good for the local economy to support local growers, but can get healthy food from other places not local. However it is about supporting your local neighbors.*
- *Yes. It supports local businesses and people. From a distribution standpoint, it reduces inbound procurement costs.*

3. Please tell me about yourself and how you have been involved in the local/regional food system.

- *We are a third party distributor storing, LiDestri Foods and Bonduelle (Old Birds Eye Allen Food) company, dry milk. Everything we store is owned by someone else, then we distribute.*
- *We have a refrigerated warehouse, store local apples and cabbage from local growers. The apples go to a Motts processing center in Williamson, New York. The cabbage goes to market or processing plant in New York City. I own 50% of the company and handle the logistics. Motts processes the apple; they themselves have some challenging issues. The challenge with growers and Motts is that Motts has a quantity to fulfill either from the local area or elsewhere. Motts has other (international) markets they can tap into whenever needed. It's a challenge because of tax breaks provided in certain government deals with China. China is the largest producer of apples in the world. They sell juice concentrate to Washington State; Washington is the largest producer of apples in the nation. Companies that can ship apples and juice concentrate cheaper than someone in Western New York to Williamson. If there was a tax on Washington State or some sort of out-of-state tax on apples to increase price outside of New York, at the same time allow for more local growers to gain an increase in demand from Motts to purchase their produce.*
- *We are transporters of food. We provide rail transportation for produce. We handle all movement on rail lines.*
- *We are a trucking company, providing transportation for local manufacturers. We haul both in-state and out-of-state.*
- *We provide butcher services. We are USDA certified and offer beef and pork.*
- *Started the CSA model to connect and network with farmers, local chefs as well as institutions in the Region. They wanted to connect to the farmer network. Then created a wholesaler distribution.*
- *We work with small farmers, wineries different customers, to get food from the farms to the people's tables.*
- *Distribute, import. Focus on locally-produced and grown markets throughout the State, to help many of the producers that don't have the ability to gain access and move their products.*
- *Store products for different processors, businesses, farmers, refrigeration warehouse.*
- *Bulk products supplier to vegetable processors all the raw materials to processors, work directly with growers and planters, delivery of crop to the processing facilities. On the fruit side, we are involved in food packaging of apples for fresh sales to supermarkets that they can find to buy them. They do a little bit of storage, but mostly direct shipping from farmers to processors.*
- *Our company has been farming in Lockport and Lyndonville since 1905. Currently a 4th generation farmer. We grow apples and also have controlled atmosphere and temperature storage. Have a fresh packing company and sell apples for 30 or so other growers.*
- *No response.*
- *I am an employee in operations for a large distributor in Syracuse. We distribute both locally sourced and non-locally sourced food products throughout the region.*

## Data and Information Gathering

1. Please describe your food warehouse; the size of your food storage facility, how food is stored/amount; for long or short periods of time, distribution in normal food channels, etc.
  - *1 million sq. ft.; 600,000 sq. ft. in temperature controlled storage. The length of stay varies depending on product and needs. Raw materials typically store from about 2 months to a 1 year, depending on supply and demand. Otherwise products vary from 1 week to 1 year.*
  - *We have 80,000 sq. ft. of refrigeration space, about 80% is regular refrigeration at 32 degrees Fahrenheit, and we can store apples depending on their variety. Our other part of the storage is controlled atmospheric storage, where we are able to use a combination of with controls using nitrogen gas and reducing oxygen content to store produce indefinitely. Allows storing in winter and having them ready in August which avoids seasonality fluctuations and keep costs reduced.*
  - *The warehouses we control are not at food grade, we work with rail shipment.*
  - *We have 50,000 sq. ft., refrigerated storage facility where we can store and ship out from.*
  - *We rotate our inventory every 2-3 weeks; we don't have a huge facility.*
  - *Currently in an old preservation building in Ontario, along Route 104, 9,000 sq. ft. of walk-in coolers. Store most of the protein, cattle, veggie products all locally raised and a small office space. Three loading docks can accommodate many heights of trucks to dock products. Most produce on low inventory, check on online inventory connect with chef and farmers when they have a request, try to provide with response and produce within 24-48 hours. When its winter season, Nov-Apr. Will store over the winter and sell to consumers.*
  - *We try not store too long for local produces bring in only fresh produce from around 75 miles, do long-term storage for wineries.*
  - *One main warehouse, about 10,000 sq. ft., has a satellite warehouse in New Jersey; use that to bring in products into New York City with smaller trucks. We also have a dry and cold storage facility in New Jersey to get more products to New York City, doing deliveries in tractor-trailers is difficult in the City. Try to bring up products from New York City; try to never have our trucks empty.*
  - *We have freezers, 0 degrees and below, 19,000 sq. ft., cooler and controlled atmosphere rooms for mainly apples. In total we have 117,000 sq. ft. facility.*
  - *Contract with controlled atmosphere storage facilities, to store products for their customers. We deal by the truck load at the industrial level, not dealing in the retail of items. Don't work with pallet size amounts, etc.*
  - *We harvest until about August and store and sell apples through July. We have about 400,000 bushels of control atmosphere storage and 120,000 in 32 degree storage. The control atmosphere controls the oxygen and CO2 levels and the temperature, which allows for long-term storage. Beyond what we store in our own facilities, we lease other facilities storing about 200,000 bushels of apples. In total about 1.5 million bushels we store and work with throughout the year, a bushel is about 42 lbs.*
  - *No response.*
  - *Our warehouse is approximately 400,000 sq. ft. It is divided into 3 sectors: freezer, cooler, and dry. We store many different items for varying periods of time depending on sourcing trends and demand trends. We are a "next day" distributor meaning our customers place an order and it is delivered the following day by our own employees using our own fleet.*

2. Where and how do your facilities and your customer businesses receive products?
  - *Process in Bergen then bag in Brockport while storing in warehouse and distributed.*
  - *Motts signs contracts with local growers, the growers then bring their products to our facility, we weigh, inspect and provide a quality grading for each batch delivered. The quality of the apple varies, if it is good quality, they get the premium price otherwise they receive the regular pricing. It's not necessarily a great price for the grower, however Motts dictates the prices, they tell you what they will pay and producers need to make decision to work with that.*
  - *We receive products at our Brockport, Holley warehouses which are at food grade.*
  - *We haul in items into our facility, consolidate the items and prepare for shipment directly to customers warehouse. We work directly with companies similar to the size of Wegmans and other larger manufacturers and some food packing companies.*
  - *The animals are brought in on cattle trucks from ranchers; we also have our own trucks and pick up products. We deliver to some of their customers. Most of our customers pick up their products.*
  - *Can pick it up at the hub, the food hub has a direct consumer selling, CSA were people pick up their groceries, etc. 4 days a week of pickups and distribution, wholesalers 2-3 a week working with local schools/restaurants. We also deliver 2-3 times to Rochester (Monroe County) and Ontario County. We currently have a fleet of 5 vehicles, two Sprinter Vans, two Mercedes and 2 box trucks with refrigerators. Reaching out to farms, direct relationships, limited produce options, with a strict local focus. Entities can reach out to different schools, BID programs through the schools. Three different competitors more limited to reach them. The chefs and go to the local markets to purchase their items, trying to eliminate the chefs having to go to the market and buy from Headwaters directly using an online portal. Chefs can go to farms, markets or vendors to gather their raw items.*
  - *Pick up from 95% from all vendors, try to deliver and pickup products.*
  - *Mainly doing pickups and delivery, a few items are delivered to them.*
  - *Truck delivers them.*
  - *Direct pickup at truck level and delivery to processing.*
  - *We receive the fruit from the farmers straight from their orchards in 20 bushel bins. Then we ship to our customers packed anyway they request, we also sell to chain stores and other wholesalers.*
  - *No response.*
  - *Our products are received daily being transported by third party carriers as well as using our own fleet to procure locally sourced products. Our customers receive products daily being delivered by our delivery associates using our own fleet.*
  
3. What are innovative approaches of larger entities to procure food? Are you aware of any innovative procurement approaches for some of the larger distributors in your food sector?
  - *Innovative procurement approaches for some of the larger distributors in your food sector. All pretty much straight forward, receive pallets and store as such.*
  - *Nitrogen generation is a good example of newer approaches for the procurement of foods. This allows for a company to spread out cost by eliminating any potential restrictions on the time to use apples. Other innovations for procurement, is called a second contact with the growers, which allows the producers to grow and store their apples and Motts may purchase, it's a mutual option, typically Motts does purchase the second contract. (Innovative in respect to Motts bottom line.) The total volume of apples produced has actually decreased.*
  - *Not applicable.*
  - *Nothing specific, not dialed into how they do their procurement.*

- *Not sure.*
  - *All about temperature can destroy good vegetable by being too cold or warm. Certain produces needs specific temperatures all relative.*
  - *Not sure, regular dry storage it depends on the product, not aware of anything to mention.*
  - *Everybody is conducting the procurement to meet their customers demand. It is demand driven, whoever the customer is.*
  - *It's pretty straightforward in our business, we work with growers that have standard practices and follow proper food safety guidelines.*
  - *No response.*
  - *No response.*
  - *No response.*
  - *Market trends are a key tool used by larger distributors in the procurement of food. Large buys when costs are low are made possible by larger entities with infrastructure in place to house large amounts of products for longer periods of time.*
4. What are the hubs in the distribution system? Does your facility send or receive products from major distribution hubs? Where are they located?
- *We deliver to Walmart distribution centers for certain grocery lines.*
  - *Our cold storage facility acts as a hub for Motts on the east side of the Finger Lakes Region.*
  - *We have a trans-load warehouse which is not for food products. We get other products like woods, paper products from various supplies all across the nation.*
  - *Have other facilities, not hubs, which allows for in-house consolidation.*
  - *Different hubs, we work with local farmers' markets, have direct relationships. We work with Farmshed in Syracuse, Finger Lakes Fresh. Hubs are a new part of the food system. Currently, difficult to ship out to New York City. Shared, responsible transportation. A fleet that is brand new to withstand travels, a distribution center in New York City with their own fleet. An independent fleeting company, Regional Access, is a company should reach out to; they have limitations to warehouse size and delivery days.*
  - *Finger Lakes Food Hub in Groton, Regional Access deemed as a food hub, with farmers dropping their produce even 1-2 cases. Always looking for ways to gain fresh food*
  - *No hubs, don't have own trucking fleet or use any fleets, customers bring the product to our storage, we just load and unload trucks.*
  - *No, not really on the send/receive products, send it directly customer.*
  - *We ship to major distribution hubs (e.g., grocery warehouses, terminal markets) to all over the country and the world.*
  - *No response.*
  - *No response.*
  - *No response.*
  - *Sysco has a regional distribution center for the Northeast that is located in Front Royal, Virginia.*
5. How much locally-grown food leaves the county/region and where does it go?
- *Couldn't even tell you, what we store about 90% goes outside of the County. Only buyer local is for Wegmans otherwise it's for food chains outside of the Region.*
  - *100% apples they store go to Williamson. The cabbage mostly goes to New York City.*
  - *Don't know, the overall percentage is about 90% of what we haul leaves the area.*
  - *Can't put a number, but we see about 100,000 lbs. of produce come through they hub.*
  - *Not sure, mainly work in New York and stays locally, goes out to Buffalo/Niagara and North County.*

- *Only for fruits and vegetables, 75% gets consumed outside of the Region.*
- *I have no idea, so much produce grown in the County. We only touch a small percentage, specifically apples.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *Sysco Syracuse distributes both locally grown and non-locally sourced products throughout Central and Northern New York State into Pennsylvania. Certain accounts require Sysco Syracuse to distribute proprietary items into Maine and the New York City metropolitan regions as well.*

6. A few questions about transportation:

a. What highway facilities do you use?

- *No trucking, just distributors. Deliveries come through I-390/NY-390, I-490, NY-19.*
- *We do not truck in products, but the apple is brought in by the growers. Motts contracts with a local trucking company takes from their facility to other warehouse located in Holley and Williamson.*
- *None.*
- *None.*
- *We try to avoid smaller roads, go where customers are. I-90/NY State Thruway, I-390/NY-390, I-490, I-590/NY-590.*
- *NY-104.*
- *We use I-90/NY State Thruway, I-390/NY-390, I-490, I-590/NY-590*
- *I-81 and Route 17.*
- *All major roads.*
- *None.*
- *No response.*
- *Mainly use I-90/NY State Thruway, I-390/NY-390, I-490, I-590/NY-590, NY-15, NY-104.*
- *All major and local roadways are used.*

b. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations?

- *Fuel is a major issue, fuel is a big driver in decision making, currently though fuel is cheap.*
- *The main roads, not many limitations, the quality/maintenance of roads is a question though. Some facilities in the rural areas are limited by restricted by roads, either bridges that are not in good shape, this can add miles and cost to our trips.*
- *Getting farmer' products to markets. To find distributors to be willing to pick up. A difficult process, refrigerated and LTL trucking is difficult. Some sort of co-op for trucking, distribution between farmers and distributors.*
- *The biggest issues, weight restriction, legal hours of service. Keeping the truck running, 2014 and newer. Very problematic and costly.*
- *Detours are problematic having a large truck. Price of fuel. Construction, detours.*
- *Weight restrictions, low-weight restrictions; Thruway tolls are high, all the truckers complain about the Thruway tolls. In the end all costs gets passed onto consumer.*
- *Tolls are ridiculously high, has negative impact on our business. Weight limits on the roads are a factor, it curtails what we can do, we can't compete with places like Washington and Canada where they can truck heavier loads. Also, the cost of energy, fuel and taxes are high in New York.*

*As well as regulations can be burdensome, with the current talks about increasing minimum wage, this will reduce competitiveness in New York when compared to the rest of the nation.*

- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *Limitations include man-power, equipment range, food safety challenges (temp. control), and weather.*

c. What rail lines and/or intermodal terminals do you use?

- *Have a rail connection with Genesee Valley Transportation rail line that goes into a building of ours.*
- *Intermodal not part of use.*
- *No.*
- *CSX, other facilities.*
- *No.*
- *No.*
- *No response.*
- *CSX Buffalo Intermodal Terminal.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *Not applicable.*

d. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use rail lines and/or intermodal terminals.]

- *Anything we do on our railroad goes through CSX, handling their rail lines. Own between Lockport and Brockport. Own in Batavia and Depew. Limitations none that can speak to that would make sense to your survey.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *Not applicable.*

e. What seaports do you use?

- *Not applicable.*
- *Use Port of Delaware.*
- *Occasionally, we try to ship out of Montreal because it is cheaper than New York.*

- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *Not applicable.*

f. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use seaports.]

- *Not applicable.*
- *None.*
- *None.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*

g. What airports do you use?

- *Not applicable.*
- *No.*
- *No.*
- *No.*
- *No.*
- *No.*
- *No.*
- *No.*
- *No.*
- *No.*
- *No.*
- *No.*
- *No.*
- *Not applicable.*

h. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use airports.]

- *Not applicable.*
- *No, have good access to I-90, Routes 98 and 5.*
- *No response.*
- *No response.*

- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *None.*

i. Describe any localized transportation issues you face in the area immediately surrounding your facilities. What potential solutions could be put in place to resolve these localized issues?

- *Nothing specific.*
- *The biggest concern main roads through Canandaigua, concerned with pedestrian and other use, a bypass would be a solution but not sure if practical. Also, the quality of the roads were they fell into disrepair. However when compared to other parts of the country, traffic is not as bad in our Region.*
- *No issues, have a good location, no issues like zoning, easy to get to main highways, etc.*
- *Road detours and bridge repairs that create temporary issues, nothing permanent.*
- *Road quality, apples bruise easily when driving rough roads. When bridges are in disrepair it is difficult to manage our shipping.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *None.*

j. What institutional and/or regulatory issues do you face (e.g., oversize/overweight vehicle restrictions)?

- *Do not do any work that requires permitting.*
- *Legal daily amount of hours of service for truckers is the biggest thing.*
- *Weight restriction is an issues and regulations in general. For example, when the EPA approves a new chemical for use on farms it can take a long time to receive approval for use in New York. New York and California are the only two states that run their own regulatory processes, which can take a long time. Neighbors in New England and Pennsylvania that have more environmentally friendly and cheaper regulatory protocols in place are able to use the new chemicals immediately, but we must wait to use it until New York State approves it, which is unnecessary in my opinion.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*



- *No response.*
- *No response.*
- *None.*

## **Closing**

1. What are the biggest opportunities/advantages of the local/regional food system?
  - *Being a local distributor providing fresh foods.*
  - *Local economy.*
  - *We have high quality of water and cleanliness of the environment as well as fairly good infrastructure.*
  - *Economy.*
  - *A fresher product, supporting local community, farmer landscape, smaller carbon footprint, less runoff, less pesticides, insecticides. More ripe and nutritious foods. Flavor of produce will be better and healthier, a more sustainable model, reducing climate change issues, land degradation and local jobs and economy. Knowing where your food is from. Developing local relationships, having a sense of community.*
  - *Knowing what you're eating, people will pay more for better food. It means everything to me anyway.*
  - *Getting healthier food to people so they can have a healthier option.*
  - *It helps the local economy.*
  - *Advantages close to a lot of people here in Western New York.*
  - *Specific to apples, not sure if much more opportunity to grow but mostly find support from large chain stores. As fresh produce becomes more and more in demand, must be able to keep up with demand.*
  - *No response.*
  - *No response.*
  - *Stimulating local economies by offering local and regional favors. Reducing transportation cost with reduction in fuel consumption as well as a reduction in carbon emissions.*
  
2. What are the biggest challenges that this region faces in terms of the food system industry?
  - *Biggest challenge is finding trucking around here. To move loads, don't have enough to move them, especially during the holidays.*
  - *To somehow increase tariffs to allow more local producers to supply local processors, not too much that the company may relocate.*
  - *The high tolls, taxes, and workers' compensation results in New York not being as competitive as compared to other parts of the country.*
  - *Winter, prevents growth, would only allow for greenhouse, difficult to find local produce, some East Coast supply chain is needed. Shorter supply-chain, current shelf life is not as high when using produce locally. Trying to compete with pricing at a national/world level may be unable to compete with large, mono crop farms in other parts of the nation. Subsidies lacking for smaller farms. The capital to get started is a tough one as well.*
  - *Major issue is not being able to get everything done. Not enough hours in the day. Being able to get to far flung territories and connect the dots.*
  - *How people are separate, everything is far away for everything. Different locations, customers, there is a lot of driving in-between.*
  - *Nothing off-hand to mention.*

- *Short growing season, cannot produce all year, certain buyers won't deal with someone that cannot.*
- *No sure if it is long or short-term issue or not, but the current "organic push" is concerning and misleading, many people are not educated on food production. They have the sense that conventional grown produce is not healthy, which is not accurate. We cannot grow organic apples at the commercial level as science stands today. People need to be educated along the same lines to eating more fresh produce and that the conventional produce grown is healthy and safe and meets or exceed EPA standards. The message needs to be out there more.*
- *No response.*
- *No response.*
- *No response.*
- *Diversity and seasonality of locally-grown products.*

3. In general terms, how much locally grown food that flows through your facility is exported from the state or country? In your opinion, how much locally grown food is exported from the State or country?

- *90%.*
- *Goes to Williamson, after that not sure.*
- *100%.*
- *2% - 50%, total guess. Cherries and apples are big in the Region, can be shipped anywhere, not familiar with the commodities side of farming. Corn produce to process*
- *I don't really know, +/- 30% what we handle. If you call New York Apple Association they can tell you a better number about elsewhere in the Region or New York State.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *Very little locally-grown food products are exported by us beyond state lines and zero out of the country.*

4. Are you aware of any federal or state agencies that track this information? (For example, the apple marketing order tracks how many apples on-farm are sold as processing apples and fresh market apples, but not where they are delivered.) Do you have any suggestions for collecting this information?

- *Not applicable.*
- *Beneficial to have more data easily available, potential companies/customers that want to work with them. People that are not on their trans-load services to go from truck to rail or rail to truck.*
- *The Farm Bureau may have some information, perhaps the Food and Drug Administration.*
- *Conducted a feasibility study with USDA and Wayne County, we produced a large map of farmers and producers.*
- *New York Apple Association.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*

- *No response.*
- *I am not personally aware of whom, if any agency, is tracking this data. Data on food, especially produce, is difficult to measure due to the many different uses and outlets of locally-grown food.*

5. Do you collect data or conduct primary research on food or farming? If so, are you willing to share that data with us?

- *Not applicable.*
- *Yes, not interested to share, we collect information by variety, grower grade, etc.*
- *Yes, from customers and producers, plus the feasibility study to gather information about supply-chain from regional food system participants.*
- *Yes, they do. No, not willing to share.*
- *No, not willing to share. We have a lot of detailed data.*
- *Not really.*
- *No.*
- *No.*
- *No.*
- *No.*
- *No.*
- *No.*
- *Our operations/distribution department does not collect this type of data.*

6. When you think about the regional food system, are there things that you would like to know, data you wish you had or research that would help address barriers?

- *Not applicable.*
- *Good to know where potentially new opportunities may come from.*
- *A full-scale study to identify supply-chain to gather information. What's being grown in the area, what farmers would like to grow, what the soils are setup to grow, the median size of the farms in the area, who would like to grow, who wants to do business.*
- *Can't think of anything.*
- *None. If they need something, they go to Cornell. They fund a lot research for a lot of crops. To grow a higher marketable year. More tonnage per acre products. To eliminate defect to market in their produce.*
- *Any data on buyer trends, like Nielsen data on people of what they are eating and interested in. It's so expensive to collect data, supermarkets do that. But for our size company, that is a prohibitive expensive.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *Data showing locally-grown regional food consumption as compared to distance involved would be interesting to me from a distribution standpoint.*

7. Who else should we be talking to about the local/regional food system?

- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *The local growers and retailers of locally-grown foods might be able to add insight on this topic.*

## Non-Retail-Wholesale Marketer-Food Bank-Institution Stakeholder Group

### Background Questions

1. When you hear the phrase “regional food system,” what does it mean to you?
  - *It is a system of networks for transporting foods.*
  - *Like some sort of co-op or a buying group in a particular area.*
  - *An effort to provide local food to local people.*
  - *It is getting food from our area.*
  - *Regional in terms of Wyoming County as an industry in leading the way in growing local products.*
  - *How food is grown and distributed. Every step from growth to consumption.*
  - *Food eaten where produced.*
  - *Local farmers and hubs set-up to connect growers and consumers.*
  - *No response.*
  - *Represents permanent bridge between farmers, consumers, and other professionals. Celebrating the local bounty on college campus by connecting customers with the food and supporting local economy.*
  
2. Do you think it’s important for more of the food consumed in our region to be grown here? Why or why not?
  - *Guess I never thought about that question. Would not like to see more food grown in the Region. If there is too much of it, the price drops out. If there was a food not currently being grown in the Region, I would like to see that grown if possible.*
  - *Yes, definitely to support local community and farmers in our Region.*
  - *Yes, jobs are number one, we need to support the local area and economy.*
  - *Definitely, yes, it would be a great way to support the local economy. The more local the product, the fresher and better it is for us.*
  - *Yes, absolutely. Higher quality of food provides a healthy nutritious choice. Also important in other health factors, youth to adulthood. Knowing where your food is grown. It is a learning experience for our youth to learn the food process of where and how it is grown or consumed.*
  - *Yes, healthier, better nutritional value supports local economy.*
  - *The economy.*
  - *Yes, economic benefits and connection to the Finger Lakes.*
  - *No response.*
  - *Yes, much more desire of customer about where food is coming from and connecting with it. Also allows us to celebrate region of origin, increasingly important in business is being able to trace where food is coming from. Made a lot easier when local. Food should tell a story, local farms and family. More fun story to tell. Better quality as well.*
  
3. Please tell me about yourself and how you have been involved in the local/regional food system.
  - *Currently operate two fruit farms, the first farm is a U-pick fruit farm (open to public) other fruit farm is picked by workers and then sold to supermarkets, food banks, distribution companies, packing houses, and small markets. We currently grow blueberries, raspberries, nectarines, peaches, apples, blackberries, and cherries.*
  - *We are a wholesale distributor of fruits and vegetables. Provide produce to many schools and universities, grocery retailers like Wegmans, Tops, distributors and others in the Region. We*

*represent over 100 farmers, buy and sell local fruits/vegetables and a member of the Pride of New York program.*

- *We are a State Authority, food distribution organization. There are currently 190 companies providing produce, bread, cookies, natural foods, meat, and seafood as well as 15 restaurants. We maintain 128 acres in Henrietta and 80 acres in Chili. We have currently a company manufacturing medicinal mushrooms. We also have spent quite amount of dollars on experimentation in wineries. We recently also picked up a brewery that is producing hard cider. Annually we give New York State \$1 million dollars to research on products at the Geneva Research Center (Agricultural Experiment Station in Geneva). This year we are researching hops and barley. The Market has given about \$20 million dollars to the State as we are one of the few state authority organizations that is profitable and helps the State with its budget challenge.*
- *I'm currently in my 16th Year as the Food Director with the school district. I've implemented initiatives to collaborate with local dairy farms to increase milk consumption in our school and worked with local farmers' market to purchase produce. My goal is to provide the best nutrition for my students within our school budget and try to work with local producers whenever possible.*
- *We work with business and school districts to coordinate programs to introduce locally grown products with the producers and schools districts, introducing local producers with schools. Trying to figure out what works best in terms of logistics in coordinating with farmers and transporting to the schools. Allowing the schools to work with farmers and even some schools to grow their own products through the use of high tunnels and community gardens at their school while looking at opportunities in entrepreneurial programs. Also, we help develop skills needed for the work force to support local industries and encourage students to gain the needed skills and education to support the industries. We have worked to build the relationships with school districts and farmers. Furthermore, through the school district they have incorporated growing produce in their school grounds and incorporating lesson in their curriculum, as a result of the farm-to-school initiative. Students recognize the value in locally grown and consumed food.*
- *A director of the programs managing and coordinating foodbanks, soup kitchens, homeless shelters, and pantries. To help those facilities meet needs. My particular role is to utilize available food-based infrastructure. We currently run about 30 farm gardens plus programs with corner stores to carry healthier food items.*
- *Involved in a farm-to-cafeteria program through a funded grant. Cornell Cooperative Extension became involved, we created a breakfast meeting and invited many of the surrounding farms to make connections and learn about each other's programs/products.*
- *Have farmers from 100 mile radius, some farmers produce different produce all depends what they grow. They recently had local farmer pick 800 ears of corn and the district was able to serve it a few days later.*
- *I have 12 years at the district; initially we had no local food purchased to serve. Now anytime we are looking to make a purchase we go through a bid process when working with producers. We have some leeway to work with more local growers than in the past. Have worked with the local Cornell Cooperative Extension and other local farmers. We tried meeting with the farmers and couldn't get items delivered by the farmers so we were never able to get connected. However, the Good Food Collective broke that barrier down. Now we are able to know what food is available and have delivered whenever we need it.*
- *Working with sustainability in particular with local foods in role on campus and job belief in home life, what things doing personal and part of job. Moved to Rochester 11 years ago, strong desire to build sustainability into dining program. Area that gave opportunities to work on increasing local foods. For us, doing that was really about establishing connections and growing*

*the network. Prior to local foods, order book and order food, company buying from, electronic ordering system. Now it's about establishing connections. Named it "Connections," local university café. Also Co-chair of sustainability, in that role and in spare time shop at many local farmers' markets. Westside farmers' market, on board, shops them as well. Monthly meeting of markets in immediate community, university, network of market managers and restaurant owners, and businessmen.*

## **Data and Information Gathering**

### **1. Where does the food come from?**

- *Approximately 15%-20% grown locally, the remainder comes from international and national sources.*
- *The produce comes from a combination of regional, state, national, and international producers. We carry all sorts of produce and depending on availability try to focus on buying local.*
- *During the home-grown season, which is short, pretty much everything is local. Throughout the year a lot of Chilean fruit, with Tilapia and Shrimp coming from Vietnam. Also, we recently opened a farmers' market and produce there is local.*
- *Our food comes from a few specific local farms, also work with distributor that provides foods originating from other countries (e.g., China, Guatemala, and Pakistan). I must say it is pretty scary to think about how our fruits and vegetable are coming from that far. Also, we recently had to put in bid contracts specifying that food cannot come from China.*
- *Not applicable.*
- *It comes from several sources:*
  - a. Retail damage – retailers such as Wegmans, products that Wegmans cannot sell or are not selling. Can be a dent in a can, a mislabel, close to sell by date, or other reasons.*
  - b. Donated case product, manufacturing error or incorrect production or overproduction.*
  - c. CFP (Community Food Programs) – Through USDA, each foodbank is established.*
  - d. Purchase the product, if we want to provide a good high quality product, we know we have to purchase these foods and typically work with a cooperative seller.*
- *From local farms, grape growers in Naples, each farm would have specific products, would coordinate with schools and the growers. We even were able to create a salad bar in schools.*
- *Have farmers from 100 mile radius, some farmers produce different produce all depends what they grow. They recently had local farmer pick 800 ears of corn and the district was able to serve it a few days later.*
- *All over Upstate New York, 40 mile radius majority. Larger farms, for example Lagoner Farms and Mason Farms in Williamson have a lot of vegetables and apples in fall.*
- *Measuring local about 10 years ago, New York State as local - stronger concentration on Upstate. 56% of money spent on food and beverage on New York State businesses. Includes processed in New York State. Where, but also impacts the local economy. Buy coffee as a local roaster, count as part of purchasing. Locally grown in wide variety, local food from central distributor, work closely with Headwater Food Hub from growing what we get from that, working together trying to find ways to grow in area together, bring other people into network that the University wouldn't deal with directly (farmers as individuals). Many local businesses deliver directly to us. Baked goods from local bakeries, deliver on daily basis. 34-36 local businesses that we work with.*

## 2. What is needed or missing to meet local food demand?

- *Not sure.*
- *A little more processed items such as coleslaw and more school packed items, a processing plant.*
- *This Governor has made it a priority for organizations to meet local food demand. For example, creating a partnership with wineries brand, partnering with Wegmans to increase public and private relationship to accelerate the local economy. A stark difference to previous governors from years past. This Governor has recognized that many companies have turned away from doing business in New York State because of taxes and other short sighted initiatives through regulations.*
- *The major need is trucking.*
- *Outreach and education is key, also growers need adequate equipment to sustain their farm production. It is an economic issue for them to deal with the purchase of equipment items. One initiative, due to the short growing season, that has been implemented is incorporation of high tunnels that can prolong the growing season.*
- *Local food movement is primarily from people with money. Our organization focuses on low-income residents to have access to fresh and healthy food. To focus on health disparities, to work hard to make it a reality. The biggest thing we need, at the federal level, are subsidizes for special crops and to provide incentives for small farmers to grow and produce more fruits and vegetables.*
- *It would vary from school to school, all logistics between each farm and the individual school. However, transportation is a big issue, farmers are growers not transporters.*
- *Cost of certain produce items can be somewhat prohibitive. Difficult for us on a strict budget to only procure local products because of the price structures. For example, we can purchase apples cheaper from Washington than New York State. We prefer to purchase local, however going through a bid and procurement process costs heavily into consideration. This is a difficult process. If we could decide not to purchase apples that are cheaper in Washington and instead support local farmers for say \$2 more that would be great. Policy makers need to look at this; this is a school district issue and other entities might not have that such as colleges/universities.*
- *The biggest need is streamlining coordination between buyers and sellers. Also, the ability of having a consistency in this upstate market and maintaining year-round supply having a reasonable price and quality. Schools are a big consumer of our wholesaler efforts but schools are not in session in summer and we need to fill these lost sales to other consumers/retailers during this period. New York City is considered a local market; it is difficult to get large buyers from there, coordinating with product selling, having the products consistently available and at a competitive price points as well are some of the issues we deal with.*
- *Processing is lacking, account for shortages in other areas. We want to do more local meats, local proteins such as beef and chicken, have not been able to source chicken, antibiotic free and crate-free pork and other more humanely raised proteins. Hard-pressed to find volumes for that area. Not a lot of processing going on. Fruits and vegetables – best part of season, half-way over before students even get here. More locally grown produce year-round, not enough process of local fruits and vegetables. Local anything, salad bar, volume, need to be processed. We don't have the manpower to chop lettuce, fresh processing, etc. Working with Headwaters on this initiative.*



3. Do you see demand coming from your customers for increased access to local food?
- *Yes, at their U-pick farm, they see a demand as a result of an increase in business recently through word of mouth of their customers to other customers. They have incorporated methods of storage to allow for their products to extend deep into the winter season as well to meet local food demand.*
  - *Yes, definitely.*
  - *Yes, more and more people not only want local, but organic. We currently have two organic companies that have revenue exceeding \$10 million a year. They have been in business for over 30 years in our Region. People want to move away from pesticides and harmful fertilizers.*
  - *Yes, parents and students do prefer local food. However, with the recent government mandates that each child have a portion of fruits and vegetables I've seen the quality drop. Prior to current Federal initiatives, I was able to pay more for fruits and produces for that may have been a bit more expensive for example oranges, kiwis, plums, nectarines, etc. to provide some variety for the lunch menu. As a result of the food mandates by the government now the fruits and vegetables are coming in cans, not tasty or well liked. Many of the students throw out fruits they don't like it. The government doesn't allow schools to recycle foods, to say the local pantry. Kids don't want to do what they are told to do so they avoid the fruits and vegetables. Also every student must get a portion of fruit and vegetables. As a result the schools must budget about 20 cents per student instead of spending a bit more from time to time to have tastier fruit and vegetables at higher quality that students may actually give a try.*
  - *Yes, through the growth of the farmers' markets and the attendees to those events. The hours of operation are expanding to accommodate even more customers. However, it takes a lot of work and is very labor intensive.*
  - *Yes.*
    - a. *The individuals we serve are not so much concerned with local food but fresh and healthy food. The priority for low-income might not be as important others in terms of local.*
    - b. *We have been working with large institutions to encourage, like the University of Rochester, and other groups to purchase locally. We need prices for local food to become cheaper and one way of doing that is by having larger institutions making purchases from local producers even if the prices are slightly higher.*
  - *Not applicable.*
  - *We do in the food school service sector. For example, we try to harness that interest through school programs. The month of October is harvest month and we try to engage students about local foods and highlighting foods to the students to increase awareness of eating healthier. An increase in education and outreach has expanded the request for what local is and how important it is.*
  - *Yes, definitely, "local food" is a buzz word and the education in understanding the right meaning is currently lagging.*
  - *Students want to know where the food is coming from. They aren't necessarily clamoring for local, but where it's coming from.*
4. Do you currently supply any local products? Are you interested in supplying more? What is the limiting factor(s) that is keeping you from selling more locally grown or produced products?
- *Yes, looking to grow cider apples. Currently not interested in adding any other vegetables or fruits as it would spread our resources too thin. We are interested in keeping our products at a high quality and avoiding any expansion at the moment.*

- *One issue that prevents us from selling more locally grown meats is the lack of GAP certified producers. We cannot purchase from a company unless they are GAP certified which limits access to smaller farmers in New York.*
- *As the State Authority, we act strictly as the landlord. We have 1 million sq. ft. of property. If any of the companies on our property are struggling, we will work with them by trying to lower rent or some other measure. Any need in infrastructure, the Authority takes care of the sewer/water and black top. All spaces are currently full and we have a waiting list for additional tenants. We do not have a lot of turnover annually, maybe 2 companies per year, about 1%. We try to work with companies as much as possible to keep them in business here.*
- *Not applicable. However, there are local farms that are great to work with but too expensive. Some of the local farmers are unable to work with schools because of our small order requests or other issues with government regulations. I have offered to work with farmers/producers to provide advertisement to reduce/even out cost with farmers but never worked out.*
- *Not applicable.*
- *Our entire business is built on local produce and we hope to do more of that. The difficulty is growing our current markets, creating a supply chain working with local farms and investing in our own infrastructure to cater to larger accounts. We are currently “bursting at the seams” at our warehouse and cannot get bigger from where they currently are.*
- *No response.*
- *Not applicable.*
- *No response.*
- *Looking at products to partner with, for example, popular hamburger on campus, local company to bottle the sauce. Hyper-local – university and take elsewhere. Not just places where we/the students go to eat, but also market. We try to have local products available to purchase, like produce, beverages, etc. for resale.*

5. What kinds of food do you run low on?

- *Raspberries.*
- *Depends on season, cannot specify.*
- *We have a large influx of Asian and Indian food in the market to meet area demands. Otherwise not sure about any particular foods.*
- *We run low on tomatoes. Occasionally we go out to purchase what’s needed from a local food store because buying too much from a distributor we may have to throw out. It would be best if we had precut apples that are bagged as well as single portion baby carrots. Kids prefer prepackages of sliced apples and mini carrots. Currently we are getting our produce mainly from Tarantino Foods (a local food distributor). USDA provides apple slices; the kids are eating them and not throwing them out versus whole apples.*
- *Not applicable.*
- *Proteins, local meats difficult to get at an affordable price.*
- *Do not know.*
- *Based on seasons, the district is relegated to frozen products during winter months.*
- *We try to be pretty responsible by not outstripping our supply chain by keeping up with coordination with farms to ensure supply prior to dealing with buyers. Don’t run into the issue that much, only during the winter as a result of natural growing season. When all the schools are in full-swing and we are unable to supply the schools during the winter unless a serious investment into infrastructure or extending supply chains. For example, greenhouses for greens and tomatoes. To be able to grow year-round acres and acres under plastic, that’s a single example. Furthermore, we have to then ask what is local. How do we keep farmers involved?*

- *Not processing or freezing vegetables in great quantity. Companies processing locally, but not “locally locally.”*

6. What are the barriers to food access for low-income residents?

- *Not quite sure, we sell a lot of products to Foodlink. Foodlink has vehicles that transport to low-income neighborhoods. Whenever possible, we will donate or provide at a reduced price/rate for a particular product, for example, if quality is low or have a surplus. I feel that low-income residents have more access than before but more can be done in regards to other companies assisting and further education/outreach.*
- *Cost, a little more expensive to eat healthy compared to eating fast food.*
- *Two barriers, weather/frost in the spring can hurt access to produce. Also, diminishing number of farms and difficulty in acquiring migrants to work especially with the efforts to do away with illegal immigrants. As a result, there will be a shortage of migrant workers.*
- *None at the school, every breakfast and lunch they have food access for the students getting school breakfast or lunch. They have access to fresh and canned fruits and vegetables. Outside of the school, it seems prohibitive for them when you can go to the local fast-food for cheap food and more expensive to get an orange in general. I recall when Chuck Schumer was pushing to have Greek yogurt into schools, I got a call to take on some yogurt, but with tight school budget we weren't able to incorporate in our menus. So that was an effort of local farms that didn't work in getting more Greek yogurt, at least in Wyoming school districts as a whole. If the government allowed us to recycle fruit and vegetables that would be ideal; if the school district can recycle they could place the unwanted fruit and vegetables on a table and allow other students that may be hungry and want to take something unwanted.*
- *Not sure.*
- *Limited stores that offer healthy foods. Very few stores that prioritize healthy foods or care centers that can bring healthy food. The majority of the issue is related to educating the residents on how to access the markets as their local source for healthy foods and to cook at home.*
- *Transportation.*
- *Not sure how to answer that. All students receive the same lunch. No designation for students depending on income for what we serve.*
- *We are still trying to solve this issue. We have a CSA program which provides subsidized-shares, we work closely with Foodlink (their goal is to increase access to healthy foods to low-income households). Foodlink does an excellent job. We don't do much else except through subsidized shares, donating to Foodlink and having some work-employment to assist in certain labor needs. Occasionally we will have a one-off donation to a local organization such as the YMCA. We are interested in doing more but need more time to develop best techniques.*
- *Lack of available fresh food, when available, quality and price point not there. Farmers' markets, fresh local food available for price point. However, some not familiar with the item. Issue is education.*

7. Are you aware of the term “food desert”? How do you define a food desert? Are you aware of any in this region? Do you have any suggestions for reducing the number of food deserts in our region?

- *Not really.*
- *No.*
- *Not applicable.*
- *Not sure.*

- *I believe that term is very flawed and faulty, defined as a neighborhood that doesn't have a grocery store a mile away. There is no such thing as a food desert when referring to a wealthy neighborhood, it's a covert word used for poor neighborhoods.*
- *Any area in general, any area of urban environment that lacks fresh produce and healthy foods. Not limited by a mile- marker. Complicated definition. Lack of access to fresh food.*
- *Not sure.*
- *No.*
- *No.*
- *Makes the most sense to help businesses establish fresh food and vegetable stands, even supplementing. Transporting convenience stores into good food, where there aren't grocery stores. Showing people how to utilize fresh foods to be appealing. Programs that reach out to children eating fresh foods would make it easier for parents.*

8. A few questions about transportation:

a. What highway facilities do you use?

- *All over New York, also into Pennsylvania. I-90/NY State Thruway, I-390/NY-390, I-490, I-590/NY-590.*
- *I hear a lot of criticism of New York tolls, always busy and expensive. I-90/NY State Thruway, I-390/NY-390.*
- *A few roads, Route 21, County Road 4, Route 5/20.*
- *We cover 10 counties. We are on every road on a weekly basis, NY-33, NY-63, NY-77, NY-96, NY 104, NY 332 and the major ones of course.*
- *Not applicable.*
- *No response.*
- *Not applicable.*
- *I-390/NY-390, I-490, Route 18.*
- *Not applicable.*
- *Not sure, will forward these questions to their buyer.*

b. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations?

- *Potholes.*
- *Biggest problem for school to go get the fresh fruits and vegetables delivered by hiring a driver, obtaining a truck and keeping up with costs. Farmers have a major expense to have to pack and deliver to the schools all the while finding the time to do it. Farmers need to farm, they don't have time to deliver and they can't be bothered.*
- *Cost of third-party service is expensive when unable to send our own trucks.*
- *None.*
- *None.*
- *None.*
- *None.*
- *Not applicable.*
- *No response.*
- *Not sure, will forward these questions to their buyer.*

c. What rail lines and/or intermodal terminals do you use?

- *We bring in products through working with Sunkist, not sure of the facility. Maybe Norfolk Southern Buffalo Intermodal Terminal and/or CSX Buffalo Intermodal Terminal.*
- *CSX, Lehigh Valley, Canadian Pacific, and Finger Lakes Railway.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *Not sure, will forward these questions to their buyer.*

d. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use rail lines and/or intermodal terminals.]

- *Infrastructure issues on rail lines, not putting money into infrastructure, you have to invest in your infrastructure.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not applicable.*
- *Not sure, will forward these questions to their buyer.*

e. What seaports do you use?

- *Port of Buffalo, Port of Montreal.*
- *Port Elizabeth/Port Newark, Other New York Port.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *Not sure, will forward these questions to their buyer.*

f. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use seaports.]

- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*

- *None.*
- *None.*
- *Not sure, will forward these questions to their buyer.*

g. What airports do you use?

- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *Not sure, will forward these questions to their buyer.*

h. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use airports.]

- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *Not sure, will forward these questions to their buyer.*

i. Describe any localized transportation issues you face in the area immediately surrounding your facilities. What potential solutions could be put in place to resolve these localized issues?

- *As of September 18, 2015, construction on Route 18 has "destroyed" business for the fall season. They feel there isn't any other viable solution, "the road needed to get work, can't do much."*
- *No real issues, own our trucks and pick up products with trucks when needed and some farmers drop off.*
- *Shortage of drivers.*
- *None.*
- *None.*
- *No response.*
- *No response.*
- *Not applicable.*
- *Not applicable.*
- *Not sure, will forward these questions to their buyer.*

j. What institutional and/or regulatory issues do you face (e.g., oversize/overweight vehicle restrictions)?

- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *Not applicable.*
- *Not applicable.*
- *No response.*
- *No response.*
- *Not sure, will forward these questions to their buyer.*

## Closing

1. What are the biggest opportunities/advantages of the local/regional food system?

- *The quality is higher, a premium product for customers. Also, when customers visit their farms they have a respect for the food grown locally.*
- *Support from the community by purchasing more local products to help local farms, one way in achieving this is by increasing more local products in schools and stores.*
- *In our Region, wages and current low-fuel for transportation.*
- *The food would be local, safe, and supporting local residents and farmers.*
- *Advantages to supplement food for poor and high poverty area. Allow people to experience the positive factors of locally grown food.*
- *Local foods being grown, supports a lot of small producers and many farmers' markets.*
- *Local economy, to be able to work with local farmers providing local needs for farmers to prepare and meet demand.*
- *To continue to develop strong supply lines into New York City that can absorb Upstate price points, trucking and figuring out the "last mile" issue, this is doable, customers that are willing to offer a premium for that opportunity. We have a great system for outreach/education to local community about local food; we need to continue working on that. Foods processing, involving cheese or fresh vegetables are opportunities that appear to be growing.*
- *No response.*
- *Food safety, recalls, local food buying, less affected by recalls. Having local network deal with issues that come up with seasonality. Problems getting things time to time, suppliers can help make suggestions. Big picture of university is economic value, part of community helping keep money in the state, might come to us more ready by giving back, more involved in the local scene. Connecting with the food when local. A lot of people interested, work hard at it, point of differentiation. What makes us special? One reason the food is local and us supporting the local economy.*

2. What are the biggest challenges that this region faces in terms of the food system industry?

- *Not sure.*
- *Don't believe the volume that is required to be produced is possible in this Region coupled with the fact of an already short growing season.*
- *The short growing season, tough storms we have at times. I was talking to a wine producer—the last two years they lost 50% of their vines because of the tough winter. Also, Governor Cuomo wants 50% of the hops used in New York breweries to be grown in New York State, which may*

*prove to be difficult to achieve due to the weather. The Region needs seasonal labor migrants, hard to find workers for processing and farm labor.*

- *Costs and time of year out of school, most of the crops are ready during the summer. Transportation is a major issue.*
- *The biggest challenge is the distribution part of getting it out to the rural community. The population is growing and the need for healthy foods is at an all-time high. There needs to be more distribution centers for rural communities; warehouses or incubators to support new businesses.*
- *Schools are not in session during the summer when it's the high-growing season.*
- *Cost is the biggest challenge; the local farmers are dealing with cost associated with farm equipment. Getting their produce to the hubs/distributors. Sometimes it's cheaper to purchase items that are outside of the State/Region versus local.*
- *Competition of price points from everyone, that's a usual barrier. The climate of Upstate, creates a short season of when and how to get it done. How can we hire a talented staff and pay them salaried? That's a challenge from farmers as well. How do we change product habit of consumers in regards to growing seasons from winter/spring? How do we continue to educate and outreach customers to deal with these old and new issues to make a change?*
- *No response.*
- *Processing, getting started. Three years working on this before real change and the buy-in. People now come to us.*

3. In general terms, how much locally grown food that flows through your facility is exported from the state or country? In your opinion, how much locally grown food is exported from the State or country?

- *50% of their apple exported outside of the Region.*
- *In general about 100,000 lbs. of produce with about 20% shipped out of the Region.*
- *Not sure.*
- *No.*
- *None.*
- *Depends on the season, about 15 bushels a week from the food hub available through May, then about 50% of food purchased during the harvest months. In the winter time we go to the frozen selection of anything that may be available.*
- *No idea of the locally grown foods, however in regards to apple orchards mostly going to Motts.*
- *No response.*
- *No response.*
- *Not applicable.*

4. Are you aware of any federal or state agencies that track this information? (For example, the apple marketing order tracks how many apples on-farm are sold as processing apples and fresh market apples, but not where they are delivered.) Do you have any suggestions for collecting this information?

- *Everyone does their own individual tracking, it's an individual thing.*
- *Not sure.*
- *No.*
- *None.*
- *Data from facilities providing their yearly revenue might be helpful.*
- *None.*
- *None.*
- *No response.*
- *No response.*



- *State agency, worked with Pride of New York, help with resources. Marketing material. Otherwise, all accounting done internally.*

5. Do you collect data or conduct primary research on food or farming? If so, are you willing to share that data with us?

- *Yes, but not willing share.*
- *Not at this time, if we set up a time to gather information, yes.*
- *Not really.*
- *We had the schools collect data on how much they purchased from the farmers.*
- *Collect data on the number of servings.*
- *Just completed a feasibility study with the USDA. They would be willing to share that information which covers farm land if it is growing/shrinking, demand, etc. They are all important metrics to keep track. However don't have resources to do so, currently.*
- *No.*
- *No.*
- *No.*
- *Not applicable.*

6. When you think about the regional food system, are there things that you would like to know, data you wish you had or research that would help address barriers?

- *Possibly, see if there was a produce high demand not being met.*
- *A list of farmers and transporters. Sometimes a list of what is available.*
- *Yes, type of initiative from not-for-profit organization can apply for funding to establish a warehouse with cold storage capabilities to increase options in the rural communities.*
- *Not necessarily, the local hub provides information to answer many of our questions.*
- *More comprehensive farmer phonebook type of information, better sense of what's happening across the states. A specific demand of a product needed, how can you get that product pushed out to another market? A better set of communication tools and to be able to share resources in terms of supply/demand and logistics.*
- *Nothing.*
- *Nothing.*
- *Nothing.*
- *No response.*
- *Just continue to support people and grow business.*

7. Who else should we be talking to about the local/regional food system?

- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *Brighton Farmers' Market.*

## Consumer-Retailer Stakeholder Group

### Background Questions

1. When you hear the phrase “regional food system,” what does it mean to you?
  - *Never heard of it before.*
  - *It means the food being produced in the area you're in and gets to where it needs to be.*
  - *A dynamic term and fairly ubiquitous, something we all can relate to.*
  - *It means that people have close access to farms, transportation, and the exchange of those food products.*
  - *It means purchasing local.*
  - *An area within a specific boundary that produces food for that particular area and beyond.*
  
2. Do you think it's important for more of the food consumed in our region to be grown here? Why or why not?
  - *Yes, helps the local economy.*
  - *Yes, absolutely, it helps everyone, helps the consumer, pick a vegetable and fruit immediately before it starts losing nutrients. The sooner a fruit or vegetable is consumed after being picked, the more flavorful and tasteful. We prefer to get tomatoes down the road rather than from another country.*
  - *Yes, fresher product and help local economy.*
  - *Yes, it reduces energy waste using transportation, keeping land productive, reducing urban sprawl, and supporting the local economy.*
  - *Sure, helps the overall economy, limits trucking across nation.*
  - *Definitely, reduces transportation costs/impact, the closer to the source the better as well as the freshest and less hands to go through the less contamination.*
  
3. Please tell me about yourself and how you have been involved in the local/regional food system.
  - *We are a farm-to-restaurant establishment working with local farmers. Our menu changes according to available vegetables, meats, etc.*
  - *We work with a few farmers directly and work with Headwater Food Hub.*
  - *Work through the Regional Economic Development Committee mainly to assist with regional development as well as other administrative responsibility.*
  - *We provide a setting for farmers, warehouse, distributors from around the Region to sell the fruits and vegetables as well as other products at our facility. Many restaurants also get their food items from the market. We have a role as a food hub in the Region and have been so for many years. Many locals have become dependent on the market for their weekly grocery shopping and we attempt to maintain the high quality from our farmers and vendors. We are not a seasonal market but year-round. We have distributors who are tenants that work to consolidate produce with smaller farmers and providing a competitive pricing for resell to other warehouse, restaurants, etc.*
  - *We are a global company, main distributor of Sysco. We work with some local produces and dairy providers.*
  - *We produce about 2,000 lbs. cheese a month. We have a tasting room, supply wineries, have an online store working with wineries. We are currently looking to apply for a liquor license for beer and be able to carry and sell.*

## Data and Information Gathering

1. What is needed or missing to meet local food demand?
  - *It's pretty easy, we need more local sustainable farms that have a more wholesale approach to selling to restaurants. A way to reduce prices, currently we pay retail prices versus being treated as a wholesale account for farmers when working with them.*
  - *A better transportation method approach from the farms to where we are. If we need a product, we would have to drive and get it. If someone else can go and purchase it and deliver that would be best.*
  - *Need more organic products grown here.*
  - *More food hubs to make it easier for producers/consumers to exchange goods, this would help many smaller farmers that do not have the time or resources to sell the products at a competitive price point.*
  - *Yes.*
  - *Consumer needs to be willing to put more of their disposable income or willing to spend on into their food source. Mass production may lower prices and mass produce and not the best product for consumption.*
  
2. Do you see demand coming from your customers for increased access to local food?
  - *No.*
  - *A little bit, some for example have asked for grass feed beef, local ingredients requested for certain parties.*
  - *Yes.*
  - *Yes, on a daily basis from customers that come to our market. We are always looking for better ways to increase access to local foods at the market.*
  - *Limiting factor, as a contract food management company, we contract with local food vending companies. Don't have control locally, it is more a company decision in terms of being able to purchase local bread/diary when possible.*
  - *Yes, business is growing about 20%-25% a year.*
  
3. Do you currently supply any local products? Are you interested in supplying more? What is the limiting factor(s) that is keeping you from selling more locally grown or produced products?
  - *No, just a restaurant that serves meals.*
  - *Nothing at the moment, perhaps sauces in the future.*
  - *We want high quality, low cost, if local suppliers can supply that, they will sell it.*
  - *Nothing specific to the market, we just manage the tenants.*
  - *We don't use a distributor, we make all of the delivery ourselves. We don't have an active salesman to promote cheese, getting their name out there, having it promoted in a way which doesn't impact their wholesale price. Anyone that is middleman takes 20%-30% and the sale is done and then they continue to take a cut, but our product is good and word of mouth is cheaper to due on our part.*
  - *Not applicable.*
  
4. Does your facility recycle/compost food packaging and/or waste? Please describe.
  - *We recycle according to city rules.*
  - *Bottles and cans, no compost.*
  - *Yes, lots of ways we recycle, different products require different methodology. Plastic bags back to the store, produce waste to biodigester.*

- *Yes, we work with local organizations to collect left over produce for compost and other packaging for recycling, for example Flower City Pickers.*
  - *Do not compost, not something involved in doing so, we do recycle. Use compostable paper goods. Expensive to community college students, to reduce cost to students, it's a challenge to do so at community college. As opposed to Hobart and William Smith, they have the resources to do so.*
  - *No.*
5. Does your facility donate left-over food to food banks? Is any unsaleable food donated? Please describe.
- *No, the current regulation doesn't make it easy, we would do it.*
  - *Occasionally we have in the past.*
  - *Yes, Foodlink gets tons of food from us.*
  - *We have organizations that coordinate with the left-over foods to handle the distribution of those foods, for example Flower City Pickers.*
  - *Do not, liability issues.*
  - *No leftovers, selling everything we got. Dealing with cheese, it never goes bad. If possible, would consider if need to move product, right don't have that issue.*
6. Are you aware of the term "food desert"? How do you define a food desert? Are you aware of any in this region? Do you have any suggestions for reducing the number of food deserts in our region?
- *Area that has no healthy food available, not sure of radius, density of population but no nutritious food.*
  - *No.*
  - *Yes, an area that is dense that is underserved for fresh food.*
  - *Yes, I don't necessarily agree with the term, as I feel the accessibility to the healthy food is there. I feel it is more an education issue rather than access to transportation. Education is key to healthy eating habits.*
  - *No.*
  - *No response.*
7. A few questions about transportation:
- a. What highway facilities do you use?
- *None really, all is delivered.*
  - *None.*
  - *Main arteries between the Finger Lakes and the Thruway.*
  - *I-90/NY State Thruway, I-390/NY-390, I-490, I-590/NY-590, US-20, NY-5, NY-14, NY-15, NY-19, NY-20A, NY-31.*
  - *I-90/NY State Thruway, I-390/NY-390, I-490, I-590/NY-590.*
  - *No response.*
- b. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations?
- *None.*
  - *Nothing really, more for customers for mass produced.*
  - *No response.*
  - *No response.*

- *No response.*
- *No response.*

c. What rail lines and/or intermodal terminals do you use?

- *None.*
- *Not applicable.*
- *None.*
- *None.*
- *None.*
- *None.*

d. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use rail lines and/or intermodal terminals.]

- *None.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*

e. What seaports do you use?

- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*

f. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use seaports.]

- *None.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*

g. What airports do you use?

- *None.*
- *Don't ship products, but use for executive travelling.*
- *None.*
- *None.*
- *None.*
- *None.*

h. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use airports.]

- *None*
- *The limitation of tandems on I-490. That would help if possible, if that is eased.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*

i. Describe any localized transportation issues you face in the area immediately surrounding your facilities. What potential solutions could be put in place to resolve these localized issues?

- *None.*
- *The space our facility can be a bit difficult to navigate, we are always looking to expanding area.*
- *Not that I'm aware.*
- *No response.*
- *No response.*
- *No response.*

j. What institutional and/or regulatory issues do you face (e.g., oversize/overweight vehicle restrictions)?

- *None.*
- *Tandem limitations.*
- *Not for us, don't transport anything, all is transported to them.*
- *No response.*
- *No response.*
- *No response.*

## **Closing**

1. What are the biggest opportunities/advantages of the local/regional food system?

- *The food tastes better when grown local and in season, keeps money locally, you get to know your farmers, how food was raised, and knowledgeable food consumption.*
- *Really just about getting produce at its peak flavor and highest nutritional value. Animals that we have seen, healthy and treated well . Serving a quality product.*
- *Having more organic products, freshly grown products.*
- *A better understanding of where the food comes from by the consumer and creating educated consumers along the way. This will only become more critical as demand increases for local produced food.*
- *Anything local saves a lot of expenses, helps community and helps community college and benefits a company such as Sodexo.*
- *Great area in being local and support local businesses. Our Region has many residents that want to support local producers.*

2. What are the biggest challenges that this region faces in terms of the food system industry?

- *No idea, just a restaurant making food.*
- *Short growing season, our restaurant is busy mainly from October through May. The summer time it is the slowest time of the year for our business and the best time local food and produce is*

*available during, makes its somewhat difficult to work with local fresh produce at times as a result.*

- *Faced with converting from conventional grown to organic, takes 3 years to change that, major strain on farmers.*
- *Seasonal laborers for farmers is an issue.*
- *Want to do business with farmers and bakeries, however stringent regulatory measures prevent these types of connections and opportunities to deal with because of overhead expenses for the small produces to provide for larger companies.*
- *A huge disconnect between here and New York City. The difficulty is getting the product down there fast enough and for the product to be fresh. We work with some of the people that are going down to New York City. Businesses that serve food would love to have the product. That cost of sending 200-300 lbs. shipments would charge \$200-\$300 for transport, that's expensive for us. Sure it's great for the trucker but bad for the producer and gets priced out of the market.*

3. In general terms, how much locally grown food that flows through your facility is exported from the state or country? In your opinion, how much locally grown food is exported from the State or country?

- *90% - 95%, no idea*
- *During the summer 70%, winter 45%-50%.*
- *70%, 40%.*
- *About 45% on average more in the summer.*
- *No, don't produce or distribute, only sell it. Don't have any opinion, no idea.*
- *Most of their customers come out of the Region through their retail.*

4. Are you aware of any federal or state agencies that track this information? (For example, the apple marketing order tracks how many apples on-farm are sold as processing apples and fresh market apples, but not where they are delivered.) Do you have any suggestions for collecting this information?

- *No.*
- *We believe New York State might have some sort of tracking system.*
- *Farmers' market food program I believe collects data. Also, look into the USDA.*
- *No, no suggestion.*
- *No response.*
- *No response.*

5. Do you collect data or conduct primary research on food or farming? If so, are you willing to share that data with us?

- *No.*
- *Yes, a ton data. No, we wouldn't share it.*
- *Cornell Cooperative Extension provides a ton of research that we look into from time to time.*
- *Yes and no.*
- *No response.*
- *No response.*

6. When you think about the regional food system, are there things that you would like to know, data you wish you had or research that would help address barriers?

- *Off the top of my head, no.*
- *Not something I deal with.*
- *No response.*
- *No response.*

- *No response.*
- *No response.*

7. Who else should we be talking to about the local/regional food system?

- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*
- *No response.*



## Recycler-Compost Processor-Waste-to-Energy Supplier Stakeholder Group

### Background Questions

1. When you hear the phrase “regional food system,” what does it mean to you?
  - *Local food/feed production and distribution.*
  - *The ability to have a region be self-sustaining for food production, distribution, and food waste. To reduce overall mileage.*
  - *Growing and raising of food products, distribution, to use and disposal.*
  - *Regional makes sense beyond produce, producing, and disposing of food waste locally.*
  - *Trying to keep things as close to home as possible; regional is the Northeast. Keep sourcing from suppliers close to stores and distribution centers and from local growers.*
  - *Local exchange of available produce produced in the Finger Lakes Region.*
  - *A farm to table network, then back to farm. Starts with farmers and then to bio-bas or to consumer. We provide fertilize material back to the farmer. It’s a closed loop. Organic waste through a digester helps to keep unwanted pathogens out. Organic waste as fertilizer to biogas back to fertilizer. Symbiotic process. Interlocking system of components and stakeholders.*
  - *A network of farmers and even food industry manufacturers and distributors, whether stores or farm markets.*
  - *A group of individuals, businesses, and organizations who work together in concert to communicate and share resources and provide a resilient way to steward the soil while providing the food and energy resources and medicine from this Region. Every region is going to have context specific solutions, but there are going to be place-based systems to take advantage of natural resources and take advantage of making them healthy for future generations.*
  
2. Do you think it’s important for more of the food consumed in our region to be grown here? Why or why not?
  - *It’s very important for food consumed in our Region to be consumed and grown here, to help support family farms, local food producers and stimulate our local economies. The shorter distances for distribution helps create sustainable feed and food.*
  - *Supports jobs in communities, produced here locally, agriculture multi-effect on support businesses.*
  - *Yes, beneficial for economy and better quality—less processed.*
  - *Yes, from sustainability and security standpoint, water drought in California ensures that we can keep local mouths fed, level of food production here for security purposes.*
  - *Absolutely, our focus is to grow more in our Region, even not seasonal through organic farm in Canandaigua by extending seasons. Instead of buying from California in the winter time, growing themselves in greenhouses. Don’t believe in transporting from Mexico in the off-season when we can. Goal to reduce carbon footprint.*
  - *Helps local economy and local farmers and cuts out unneeded expenses with transportation.*
  - *Environmental, always a good thing. Locally grown helps local farms. Not all regions can produce that type of food, however. Sustainable farms are good, but New York needs to be able to share with the rest of the country.*
  - *Yes, growing and selling locally helps economy, definitely a positive thing. Depends on consumer being willing to pay more or cover costs of production locally.*
  - *Important that the food that we eat can be grown here in an energy and environmentally-minded focus; can be preventive to bringing it in from other areas, do that as much as possible. Food is very political, we should combine local production with the examination of what we are*

*eating. Less importation of exotic materials and food that has traveled a great distance, find alternatives here. Don't try to grow avocados, find other fat and acid instead in other foods that are well-suited to this Region's weather and soil types.*

3. Please tell me about yourself and how you have been involved in the local/regional food system.
  - *We are one of the nation's leading providers of rendering and used cooking oil removal. We are a completely sustainable company, recycling meat trimmings and used cooking oil into valuable products that can be used to feed livestock, power vehicles, and act as a base for everyday items.*
  - *Dairy farm with 15,000 milk gallons every day. Sell to project that takes milk and skims it, products into regional food system, yogurt, cream cheese, cheese, etc. After milk is processed, wastewater that occurs, manure from cows or milky solids in the waste stream, anaerobic digester, green energy. Started 16-18 months ago. Takes effluent and puts into 1.3 million gallon digester system, German design, bacteria, biogas created, and electricity generated for the farm and processing digester. Manure/waste water, other food wastes from other food manufacturers, load of whey from yogurt processing – digester adds energy to system. Way to process food scraps and residuals from customers to add energy to mixture. Conveyance of it is separated – digester 70-80 tons per week of food scraps, natural upcycling hauling from customers to digester. Notable – Wegmans and RIT customer pick up food scraps, inedible food, 40 locations Rochester/Buffalo. Other anaerobic digester in Canandaigua. Gap filling on back end, food waste and put it to good use. Bio gas and electricity for use on the farm.*
  - *VP of Operations, gas by-product of waste to landfill, methane, some CO2 is combustible, reciprocating engine, generate power and pipeline gas with renewable fuel. 44 sites across the country.*
  - *Operational perspective – waste reduction strategies, dining units, over production and excess prepared food and waste and where they go. Sourcing of items, beginning to work with local distributor for local foods.*
  - *Manage sustainability, part of that is working with the organic farm. Has a farming background, egg farm in Wayne County, family responsibility-fourth generation. Local food waste recycling efforts, 60 stores (86 chain stores) diverting food waste from landfill to anaerobic digester or composting. Regional program, keeping things out of landfills and donation programs with Foodlink.*
  - *Started in family bean business in 1948, worked for 20 years, entered politics, first as town supervisor, county supervisor, etc. but continued to be involved in food business. Business changed to government interference. (1) Started subsidizing ethanol, big mistake, people found advantageous to grow soybeans and corn instead of dry beans. (2) Factor is NYS weather. Competing with arid regions. Every third year bad crop due to weather. Other areas of the country do not experience same situation. Also importing beans from China. Began vermaculture business in 2004, 30 acre rural industrial park with warehouse packed with machinery and equipment. Mixing yard waste and leaves with farm vegetables, organic vegetables mixed with worms. 6-month period, DEC approved trenches, soils amendment, lechee worm, added to athletic fields. Worm aid non-toxic immediately play on it, safe for people and animals. Regional director of DEC, introduced to the idea, worthwhile project, capital funding, etc. Strictly organic process, no recycling of oils, plastics, etc. Not unique, done for thousands of years, tricks that make your product more useful. Administrator, left DEC – ideas for increasing diversion programs and food recycling, great sources of food to be composed jails/nursing homes/hospitals, etc. with large quantity of food waste, wanting to do it, disposal of waste and yard waste, no longer permitted in landfills. Education of people to do composting in backyard.*

- *President of company, involved since 2010. Second facility in Batavia (engineering and permitting phase). [Break ground as early as fall.] Background in environmental science and business. Vision is to save the environment and to help sustain agriculture and food chain and bio-renewable energy. High use for organic material. One step above composting, which can't control degradation in composting process. Digestion as a control element eliminates unwanted pathogens involved in the process. Located nearby 2,000 cows on Synergy farms, which is leased by farmer. Manure pumped directly in. One in Genesee will be 100% food waste. Pump-in from dairy cows at the Wyoming County facility. Important to recognize manure in the food system – impediment to having more cows = manure. It's a limiting factor. The land can only handle so much manure. This project should also think about dairy cows – dairy processing, manure is key aspect of growth.*
- *Environmental background, NOFA before Waste Management, personal interest. Nationally as a company; organics composting/anaerobic digestion, variety of programs going on across the country. Residential pick up of organics, not available here locally (California state law food diversion regulations that require people to divert food with regulation and funding). Food diversion law. Strong personal desires otherwise. Locally, university customers that separate organics and provide collection pick up to composting facility at High Acres. Finished compost product, residential leaf waste from Perinton community. New York City will soon be implementing regulations for restaurants, certain size (customer base or chain) start enacting to divert food waste.*
- *Living in Rochester, 13 years studying engineering, Master's Degree in energy alternative and energy resources as well. In the past worked in permaculture design and innovation, co-founded, developing a solution to allow homeowners and businesses and schools to divert organic materials destined to the landfill; keep with the food cycle, keep materials local, and turn problems into solution and provide nutrient rich fertilizer. In working with project, hundreds of families and numerous business, diverted 2,000 lbs. from landfill, food stuffs, and interact with community gardens and other people involved with the food system. Helping to institute social change, movement to inspire people to change their behavior and feelings towards waste materials and giving opportunities to participate to people that don't have the time or skills.*

## **Data and Information Gathering**

1. What are the types and volumes of food waste collected?
  - *We have been providing services to agriculture, food processing, and food service industries through the collection of used cooking oil from restaurants and the collection of meat trimming and fat and bone from slaughter facilities, food processors, and grocery stores.*
  - *70-80 tons per week of food scraps, 40-50 tons of wastewater and other rejected food processing residuals.*
  - *Good proportion is food waste, municipal waste that is non-hazardous and no construction. Organic waste, sewage sludge, yard waste – 50%.*
  - *Food waste not being consumed by students, a lot of that is excess prepared food not consumed, change production habit to reduce waste. 15,000 lbs. a year to Recover Rochester. Compost organics based on food recovery EPA, no pyramid, no outlet to feed animals, compost excess waste pre- and post-consumer, post-consumer in large dining unit. Natural Upcycling collects and hauls away. 300,000 lbs. annually, compost organics, just food waste, no fibers (e.g., napkins, plates).*
  - *Food waste diversion, inedible food scraps not for human consumption. "Food print," to reduce the amount of food wasted, increase amount to sell (e.g., program in-store for chefs to shop for*

*ugly, product to use in recipes, not able to be utilized in stores and donated to Foodlink). Donation partners in every store. Inedible food scraps (spoiled) rinds, peels, go into anaerobic digestion program, or to animal farmers for feed. Volumes vary, in 2014, composted 18 million pounds. Donation 15 million pounds in 2014. 19 stores using anaerobic digestion. Bakery and produce items are picked up by farmers for animal feed. 26 total stores in Rochester area. (So, food waste goes to landfill in 7 stores.) Anaerobic digestion, Lawnhurst Farms and Noblehurst Farms. Chris Noble partners with food waste hauling – local business. No store in Rochester that participates in composting.*

- *Store organic corn, wheat, soybeans, clean and process. Requires transportation. Most of the time large tractor trailer, 45-55,000 lbs. at a time. Organic material on much smaller truck.*
- *Manure. Also, dairy food wastes combined with manure.*
- *University of Rochester, Nazareth and Fisher are the university customers. Town vehicles collect leaf and yard waste, Waste Management does the composting. One of the universities is doing pre and post-consumer food waste. Other two are pre food waste (food preparation). List of acceptable organics that we'll take. Napkins, etc. pilot with university with recycling silverware. Pre – consumer source separated organics.*
- *We accept all types of food scraps – dairy, shellfish, nuts, vegetables, but we are not a yard scraps collection service (primarily acquiring food scraps). Small amount of yards scraps ok, like leaves.*

2. What happens to food waste once it's recycled/composted? What is created?

- *We recycle animal by-products and kitchen waste into valuable products that can used to feed livestock and power vehicles. Our products include feeding fats, tallow, protein meal, and yellow grease. We also supply the ingredients for biodiesel production to facilities throughout our region.*
- *Bio gas and electricity for use on the farm and milk processing plant.*
- *Push right now to get organics out of waste stream, especially food waste. Their methane gas process is similar to anaerobic digester.*
- *Youngblood manages with Natural Upcycling - solid waste and recycling (trucking). Rating of the road that is being used. Weight restrictions – organics are heavy.*
- *Powers the farm, energy, byproduct of digester is solid "digestate," used for cow bedding. Full service with Lawnhurst and Noblehurst, pays tipping fee which is lower at the farm than for landfill. Hauler rate is higher, however. Doing this for four years now, just about cost neutral with composting efforts. Competition, landfills all competing for material.*
- *Plant debris with farm vegetables, organic vegetables mixed with worms to create compost material.*
- *Once food waste/manure is recycled, renewable energy (electricity). Also bedding and fertilizer goes back to farm.*
- *Compost two types: (1) food waste and (2) leaves by themselves. Leaf waste compost available at local parks. Town of Perinton public parks, wood chips and compost available. Food waste not available off-site. Nature area part of landfill, compost used in wetlands onsite. Looking into certification by US Composting Council. Opportunity to distribute back as finished product. Quarterly testing, meet certain qualifications. Distribute back to customers – not sure who? In bulk or sealed bags, and sell to anyone? Not sure, some universities have expressed interest in this type of compost. Something we must explore.*
- *Collection twice per week. Most volume is from households. Per household is very small. Largely the reason volume hasn't been that great. More commercial businesses, volume has been increasing substantially. Recycled and composted = product is NOFA certified organic product,*

*Vermi-Green/produced in Palmyra. Other different outlets, community gardens, residents, and to local farmers.*

3. Do you have any ideas for increasing diversion programs that promote composting and food recycling for all types of food waste?
- *None at this time.*
  - *Wegmans and Rochester Institute of Technology customers, for example is the next big idea, program locate 30-50 garbage totes, organics labeled collected from docks into modified dump truck. Bring it back to digester. Access to conveyance systems, upcycling business to promote regulatory diversion program. Business, competing against landfills. Positive benefit to customers, cost-neutral, choose option, organics collection system. Syracuse market has a mechanism in place that controls trash in metro area, compels it to disposal sites; rate higher than landfill areas in Rochester/Buffalo, incentive for business to compost or digest is much higher. Easier to throw food into trash than segregate it, from a consumer standpoint. Opportunities – food that doesn't leave the consumer, dairy processor, not all milk needs quality control standards. DEC started to increase regulation of liquid materials to landfills, double the price, more than 85% liquid, digester to take and reasonable de-package, and putting into system. Able to attain higher tipping fees than food scraps from manufacturer.*
  - *Animal waste, food waste digesters, large-scale, key is having a collection system. Larger-scale power with collection infrastructure. Trucks are switching to natural gas. Municipalities capturing their own biogas, running in their own vehicles.*
  - *Reduce tipping fees. Regional support from municipal level. Rochester Institute of Technology doing so at price-premium. But it's a social responsibility. Reduce inherent benefits, but from financial perspective makes no sense.*
  - *More infrastructures in Upstate New York. Anaerobic digestion is a food option. Can recycle anything but paper and packaging. Paper packaging can be composted, except meat and bone (packaging can be done, so more post-consumer waste). Can't accept packaging in digestion program. Composting infrastructure. More options for non-compostable package solutions. More food waste haulers, it's a specialization. Bring Natural Upcycling into food waste. They have food waste hauling trucks, specialty with washers installed. Opportunity with incentives or grants to try new technology for hauling, carbon intense part of system. Donation is a big opportunity, more perishable food (the weight comes from) getting to Foodlink in timely manner and using it – transportation and distribution return, cold-change, number of agencies don't have sophistication with refrigeration. Quick turnaround.*
  - *Cities of Auburn and Cortland, DEC- approved material will clean up sewage sludge, not put into landfills.*
  - *Awareness around use of organics. Composting anaerobic digestion. Food that hasn't been approved by FDA for human consumption versus animal consumption. Role of digester. USDA focused extensively around that. Change that current diversion program.*
  - *Talked with Community Composting – great model. Hope to partner with them. Waste management, large customers as compared with residential. Individual, backyard composting available to those interested in it.*
  - *Yes! Many! Tried and true in other regions, most effective in the City of Rochester, model of collection at curbside, "pay as you throw." People's behavior – change when faced with a charge or fee. For example, Portland, Maine has a curbside collection program. Operators can only pick up specific bags (blue). Not in blue bag, not collected. Resident buys blue bags, few dollars per bag. Free recycling service. Interruption in the waste stream occurs. Compost service cheaper than waste-haulers operators. Key piece is to have services like Community Composting for*

*those who don't have ability to compost at home. Services need to be combined with government-funded education to keep people apprised; via videos (e.g., this is how you separate food scraps). Consistent education and message with service = adoption of more diversion programs. Lastly, collection services (public or private) massive increase in processing capacity for organics. Farms that do composting, but not commercial or industrial facilities (unlike Vermi-green) to match demand, increasing amount for processing capacity.*

4. A few questions about transportation:
  - a. What highway facilities do you use?
    - *We use all of the below mentioned highways. We provide service to the entire state of New York.*
    - *Digester single site, receiver site. Natural Upcycling business trucking company. All of those roads.*
    - *I-90/NY State Thruway, NYS-5.*
    - *All trucking.*
    - *I-90/NY State Thruway, I-390/NY-390, I-490, I-590/NY-590, US-20, NY-5, NY-14, NY-15 (distribution center in Pennsylvania).*
    - *US-20, NY-5, NY-14.*
    - *Farm itself. No limitations to pumping it in.*
    - *Haulers collect several more than one collection during the week, Waste Management hauling company on Mt. Read Blvd. Wait few days, then do another pick up then drop off at High Acres.*
    - *I-90/NY State Thruway, I-390/NY-390, I-490, I-590/NY-590, NY-31, NY-33, NY-96, NY-104, NY-441.*
  - b. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations?
    - *Renderers operate some of the largest U.S. truck fleets, moving 44 billion lbs. each year. We support legislation to increase truck weights to 97,000 lbs. on interstate highways with an additional axle and braking power. We need a long term transportation bill to reauthorize federal highway programs to repair/rebuild infrastructure.*
    - *Not really. Fledgling business, 3 or 4 trucks, no weight restrictions, 33,000. CH4biogas is a digester-designer, conveyance of system from Europe, bringing materials in. EnviTec Biogas, turn-key biogas provider, contract, they were responsible for bringing materials over.*
    - *DOT, trucking limitations. Weight size, etc. Seneca Meadows, a lot of DOT presence.*
    - *None.*
    - *More options for "tandem," would take opportunity. 15 not approved for tandem runs.*
    - *Don't know of any limitations.*
    - *None.*
    - *Not applicable.*
    - *Highly encourage more of the interstate system to use easy pass technology for fewer slowdowns.*
  - c. What rail lines and/or intermodal terminals do you use?
    - *None.*
    - *None.*
    - *Some landfills have rail spurs.*
    - *None.*
    - *None.*

- *Railroad discontinued storage taken out of facility. Rail is not an issue.*
- *None.*
- *Not applicable.*
- *None.*

d. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use rail lines and/or intermodal terminals.]

- *None.*
- *None.*
- *Not applicable.*
- *None.*
- *None.*
- *None.*
- *None.*
- *Not applicable.*
- *None.*

e. What seaports do you use?

- *None.*
- *None.*
- *Not applicable.*
- *None.*
- *None.*
- *None.*
- *Port Newark. Manufacturer equipment from Germany (made in Austria) came in through Newark and driven up. Containers through that port. Locally cannot be manufactured for our specs (equipment). Danish technology. Local workforce involved in mechanical operation. Element of training, but on the whole no issues. Great team.*
- *Not applicable.*
- *None.*

f. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use seaports.]

- *None.*
- *None.*
- *Not applicable.*
- *None.*
- *None.*
- *None.*
- *Delayed equipment. Timing of construction.*
- *Not applicable.*
- *None.*

g. What airports do you use?

- *None.*
- *None.*
- *Not applicable.*
- *None.*

- *None.*
- *None.*
- *None.*
- *Not applicable.*
- *None.*

h. What are the limitations (if any)? What potential solutions could be put in place to mitigate these limitations? [Can skip follow-on questions if they do not use airports.]

- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *Not applicable.*
- *None.*

i. Describe any localized transportation issues you face in the area immediately surrounding your facilities. What potential solutions could be put in place to resolve these localized issues?

- *We support legislation to increase truck weights to 97,000 lbs. on interstate highways with an additional axle and braking power. We need a long term transportation bill to reauthorize federal highway programs to repair/rebuild infrastructure.*
- *None.*
- *None.*
- *None.*
- *None.*
- *None.*
- *Transportation of products, pumped in from the farm. Some dairy by-products – very close to farms. Expensive to truck things around. Carbon monoxide from the air. Being on their site, bedding – forklifted, all the buildings are located next to each other.*
- *Specially designed trucks for organic waste collection, required piece of equipment. Dual purpose composting trip, interchanges for "bagster" – flexible bags versus dumpster. Two purposes. Works well for Waste Management.*
- *No issues. Most of the collection all vehicles (dump trucks and trash collection) aren't at all equipped for organics collection. Solve this issue, consult on those issues, materials are extremely dense and wet. Find right sized containers pairing with lifting equipment and bodies on truck without leaking is something that needs to be figured out and rinse the containers, a lot of issues with collectors' experience. Problem specific issue, as opposed to roads.*

j. What institutional and/or regulatory issues do you face (e.g., oversize/overweight vehicle restrictions)?

- *We support legislation to increase truck weights to 97,000 lbs. on interstate highways with an additional axle and braking power.*
- *Manufacture equipment locally - EnviTec Biogas has two digesters in the state, cost-effective in building a digester to find locally produced materials. EnviTec Biogas pumps, needed to use, hundreds of digesters in Germany and Italy, comfortable with technology. Developing supply chain, which takes time and experience. Fully develop local supply chain. Currency shifts.*



*Digester purchase, Euro 1.3 to 1, cost-advantages to procuring European equipment. Part of the digester working group attempting to value for digesters for New York. Net metering to use what we produce on the farm, power to one meter, we can use on a 1:1 credit basis. Oftentimes, produce more than consumed, consumed at cost, very low, natural gas prices, attempting to form state perspective changing laws on public service commission, to realize digester not only produce power, but reduce carbon emission, develop energy structure, away from disasters (large plants as opposed to smaller plants), disaster recovery. Supply demand. Emulating what Europe is developing energy structure, biogas, and wind*

- *None.*
- *On par with sump truck, lift units and washers, into suction component. Facility standpoint, loading dock and space, another stream to store in building. Waste is afterthought. Square footage is at a premium. Where to store and how to get trucks in.*
- *None.*
- *Used railroad extensively to ship 100 cars of grain, 100 loads of dry beans, while convenient unpredictable to availability of railroad cars, delivery, thieves drill holes in cars and steal product. Truck, more reliable and dependable, industry moving towards "same day service." Loss of product, etc. positive way to ship but more expensive.*
- *None.*
- *More feasible, fees associated with food diversion, push people – funding and regulation.*
- *None.*

## **Closing**

1. What are the biggest opportunities/advantages of the local/regional food system?
  - *Local rendering recycles useful organics and carbon into new uses as livestock feed, biofuels and consumer products, which helps stimulate our local / regional economies.*
  - *Greater awareness in seasonal items, dairy consumed is produced locally. Develop more year-round production.*
  - *Potential to have cradle to grave process, digesters, land and area to grow crops and raise animals.*
  - *If done well, opportunities for cost savings and economy of scale. Nothing standardized, becomes different restrictions and processes, large generator – takes everything and processes, type of process can't always. Industrial processing perspective, large-scale facilities and multiple ways, expansion of materials collected, less labor, added costs will be less.*
  - *Growing more out of season here in New York, Finger Lakes, opportunity to extend seasons. High tunnel green houses.*
  - *Economics more feasible, same-day deliverable issue, people not anxious to build warehouses, New York City market, rental is cost-prohibitive, order product and its delivered just before ready to use.*
  - *Challenges on behalf of farm dairy and agriculture – demand to produce more. Pressure to get more gallons per cow, etc. More output. Support that growth cannot put food wastes into landfills or on top of productive cropland. It has to be an organized to enable more cows. More fertilizer, the right fertilizer. Not a sustainable model. Improve the network.*
  - *NOFA, incredible diversity of food, great network of organic and nonorganic farmers in the area, markets, CSAs strength in the area.*
  - *A lot of economic development and job creation composting production into the Region as opposed to losing valuable material and exporting or diverting to other places. More consciousness, people are going to be learning more about eating/feeding families.*

2. What are the biggest challenges that this region faces in terms of the food system industry?
- *Repair/rebuild our highway infrastructures. These projects take many years of planning, and most regions will not start them without knowing how much money they will receive from the federal government. Federal funds can provide 52 percent of the average funding for state highway, bridge construction and maintenance. Increased regulations from FDA, EPA and DOT.*
  - *Weather, year-round supplier of many foods, realistic of what we can produce, import others. Using what we have as natural resources; good growing conditions, water, maximizing local opportunities.*
  - *Trucking, biggest challenge not economical.*
  - *Not applicable.*
  - *Short growing season, ability to heat the houses for different crops, challenge but opportunity. Good spot in Finger Lakes Region with institutions to figure things out, Cornell University has great assistance, behavior change that has to happen to change food out of season because season ended, or customers wanting bananas. Education of food waste diversion, community starts to utilize and encourage growth of that, helps all of us bring the costs down, suppliers that are working with natural up cycling. More stops they can make, share the costs.*
  - *Regulation, processing the product, inspections, etc. Growers, migrant labor. Government subsidizes something; existing businesses with grants and incentives, government will drive them out of business.*
  - *Not applicable.*
  - *Cost of production, growers paying themselves fair wages, finding customers that understand and appreciate and pay more for local and organic.*
  - *We're still dependent upon bringing in food, resources to feed the Region. We don't produce as much as we consume. The energy inputs (fertilizers) to produce food is coming from other places. Use natural resources in a sustainable way to produce food and not lose valuable good at the end of the cycle. Not nearly enough capacity for organics recycling, need to make into reality.*
3. In general terms, how much locally grown food that flows through your facility is exported from the state or country? In your opinion, how much locally grown food is exported from the State or country?
- *Not applicable.*
  - *Don't believe any milk is exported.*
  - *Municipal waste comes from county primarily, majority of waste from the county. Seneca Energy receives by-product of waste.*
  - *Measure local and sustainably, nothing from Barilla and Kraft counts. Less than 1%, sustainability produced. For example, we prefer local dairy products imported from a sustainable farm as opposed to a CAFO. 30% - locally grown/produced.*
  - *During the season, most stays here. Locally grown, farmers come to stores, close to them. Outside of season things that are grown here, apples from Wayne County are shipped to all stores.*
  - *Not applicable.*
  - *Not applicable.*
  - *All local.*
  - *None of material we pick up is brought to another state or country. Everything we collect and process is in the Region and distributed to the Region.*

4. Are you aware of any federal or state agencies that track this information? (For example, the apple marketing order tracks how many apples on-farm are sold as processing apples and fresh market apples, but not where they are delivered.) Do you have any suggestions for collecting this information?

- *Not applicable.*
- *State of New York collects information on milk utilization, what types of plants use milk. From food waste perspective, Sally Rowland at DEC collects information about what types of food waste and amount to digester.*
- *Not applicable.*
- *Participate in food recovery challenge, on their software, EPA.*
- *Diversion – EPA food recovery change, reporting annually.*
- *Regular surveys from Department of Agriculture and federal agencies about future planning efforts. Nice to have knowledge, but tells the world how cheap they can buy something. Statistics work against the market, both the processor and producer.*
- *Number of cows per land, per farm. Dairy cooperatives collect primary data.*
- *Permit with DEC for composting and leaf waste, registration for food compost. Annual report to composting process.*
- *Not aware.*

5. Do you collect data or conduct primary research on food or farming? If so, are you willing to share that data with us?

- *We do not collect or conduct research.*
- *Food scraps from customers into digester. Gives that information to Sally Rowland, collects from digesters around New York State.*
- *None.*
- *Distributor working with (Headwater Foods) – dining units still exploring. Reporting purposes, it's a challenge to get data from primary food service provider. Challenging to report. Reporting requirements built into next contract.*
- *Not applicable.*
- *Not applicable.*
- *Via the DEC permit (CAFOs)? Tracking where products are being produced.*
- *Tonnage of organics that can be monitored. 2011, increase in amount of organics. Educational sales rep to dining services reps about what can be collected, university is more interested. Customers are collecting more organic waste material.*
- *Residential location data collection, weigh it, association with each collection point over time. Material is generated; weight of waste a family produces, and doing the same with restaurants. Statistical analysis to see what business/household rates really look like.*

6. When you think about the regional food system, are there things that you would like to know, data you wish you had or research that would help address barriers?

- *None.*
- *None.*
- *Composting still not as clean. CO2 emissions. Only so much compost can be used. At some point, compost piles becoming an issue – big piles. Compost for nothing, bring waste to landfill. Composting is more labor-inducive. Sludge, where to put it if not in landfill? Contaminants in liquids - more difficult, higher maintenance to the engine, silicone in the engines. Might improve on maintenance cost if liquids removed. Would like to know quantity of how much food waste in the geographically area for digester projects.*

- *Caveat is local and sustainable. Trying to get reporting data without appropriate definitions. What we mean and how to report accurately to be more transparent on how to report clearly.*
- *Working on this so long, food waste program in place, would like to do more of it.*
- *Directory of who has what, such as the recycling book put out by Ontario County that lists surplus things that people want to get rid of – for example, wooden pallets. Same kinds of inventory, very helpful, cheap marketing. Vermiculture, organic farmers, get product – in exchange.*
- *Help to promote overall process. Who’s producing what and where – dairy farmer. Dairy processors are, typically located. Opportunity to do regional products. Centrally locate. Bring stuff into us. Lynchpin providers. Help with sustainability factor. Help to solve manure management problem, wouldn’t be a big cost to them to dispose of.*
- *Not applicable.*
- *Find more businesses to divert food scraps, how can they reach out and know they exist? Barrier to participation – Western New York has lowest landfill tipping fees in entire country. Extraordinarily inexpensive. Organic processing is not an attractive option. Run a business to collect organics and process into composting = fees. Software, equipment, fuel, labor, some tipping fees pay to Vermi-green to process. Landfilling is so cheap, bottom-line oriented business can’t work with composting groups because they will lose money. Unless they have corporate, social responsibility - green series, or don’t want to see valuables being lost. Economically feasible. Local issue. Met with DEC, etc. No one can give a straight answer about why tipping fees are so low in the region.*

7. Who else should we be talking to about the local/regional food system?

- *Not applicable.*
- *Organics Recycling and Beneficial Reuse, Sally Rowland, P.E. Tom Feisinger, NYSERDA, questions about digesters, who is doing what across the state, local electricity utilization/mobile system, etc.*
- *Not applicable.*
- *Cam Shauf, University of Rochester. Recycling Coordinator at University of Rochester, Amy Cadre.*
- *Foodlink.*
- *Talk to the farmers, growers, particularly the smaller farmers, corporate farms have time to do networking, don’t do the growing themselves. Statistics and corporate directed. Niche market, small growers working together, Mennonites and Amish wanting to have a facility of their own to do value-added processing, organic (organic in demand) sellers-market, set your margin and be profitable. See its potential, co-op amongst families, doing value-added. For instance, clean rye, sell for 25 cents a bushel, \$2 more when put into bag.*
- *Milk processors.*
- *Education services person.*
- *Vermi-Green, LLC.*