Martin County Food System Feasibility Study

by

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As a part of the Martin County Food System Feasibility Study, input was solicited from a wide range of stakeholders in the Food Supply Chain in Martin County and surrounding counties. This input included a series of in-person interviews with a cross-section of participants in the local and regional food system, from small and large growers to wholesale distributors, large institutional buyers, retail produce markets and restaurants. Additional input was collected from consumers through a telephone survey (350 participants), and from a number of open meetings with citizens and local citizen advisory groups[2].

This report consists of four sections. The first three sections present responses from the aforementioned interviews as follows:

1. The first section will report the findings of the interviews with farmers and producers (i.e., interviews with those supplying the markets, providing input on the "supply side" issues).
2. The second section will report the findings of the interviews with participants on the "demand side" including wholesaler distributors, large institutional buyers, retail produce markets and restaurants.
3. The third section will report the findings from the consumer telephone surveys (a perspective on demand side issues from the consumers' point of view).

The fourth section will contain other discussion including the responses from the open citizen meetings, along with concluding observations. A separate report will be submitted on local food systems infrastructure based on surveys conducted by Martin County extension faculty.

In the interest of having interview and survey participants speak openly about their views and opinions, they were assured that their individual responses would remain anonymous. Therefore, to protect their anonymity, responses will not be attributed to individual interviewees;

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[2] Special thanks to Yvette Goodiel of UF/IFAS Martin County Extension for her efforts in obtaining and coordinating this grant and arranging the meetings with citizen advisory groups, and to Natalie Parkell, also of UF/IFAS Martin County Extension, for arranging the outstanding range of interviews.

nevertheless, both their general and specific observations will be included in the reviews and taken into consideration in formulating the conclusions of this study.

1.) SUPPLY SIDE (GROWER/PRODUCER) INTERVIEWS

The questionnaire used for the supply side interviews is contained in Appendix 1. This section will report responses from the specific interview questions, and conclude with other observations offered by the interviewees.

Ownership/Employment Structure

All interviewees were owner/managers of their farming/production operations. Most owned their land, although some rented or leased all or portions of their land.

Most all of the interviewees reported that they considered their operations to be "family run" or "owner run" in cases where there were business partners who were not related. Even in instances of larger farms where there appeared to be a corporate structure, interviewees didn't consider their operations as being "corporate-run." These responses appeared to be a reflection of the personal dedication and commitment of interviewees to agricultural and food production, even for the largest operations.

Sizes of farms ranged from less than an acre to multiple thousands of acres, and employment on the surveyed operations ran from small operations where the principals were the only employees, to 60 or more regular and seasonal employees. Similarly, the reported gross annual sales figures for these operations covered a very broad range from less than $50,000 to over $500,000.

In terms of employment figures, the average number of individuals employed at the agricultural operations interviewed during their peak season was less than 19, and if large farms are removed from the sample, the average employment figure drops to only 11 people.

Distribution Channels

The real diversity among the farms and production operations manifest itself in terms of their sales outlets with some almost strictly wholesale and others entirely retail to the consumer, while still others reported some combination of both wholesale and retail sales.

Wholesale/Retail

For those operations selling both wholesale and retail, few of the respondents seemed to be able to offer any clear indication of the percentage of their sales moving through the various channels.

One interviewee offered that it was a difficult question because of confusion related to whether they were thinking about the issue in terms of quantity or value – because unit prices are higher at retail than at wholesale, the proportion of sales wholesale versus retail would generate different proportions if viewed in terms of quantity versus value. In general, it simply did not seem to be an issue that most of the interviewees thought about very much. They simply appeared to have their outlets, and worked to try to serve them as best they could.

In terms of the specific sales outlets, several of the smaller growers reported that their production volumes were insufficient to realistically be able to supply large wholesalers and food distributors. They said that the situation was similar for efforts to try to serve large retail grocery stores, plus there were impediments in terms of the food safety certifications required by the large retail grocery chains.

Larger and specialty operations, on the other hand, tended to rely very heavily on sales to wholesalers, distributors and/or large retailer chains. In some cases, the producers tended to work with relatively local wholesalers and distributors although they were aware that their product may have, in turn, been distributed widely in east coast markets or possibly even nationally. Specialty product producers, on the other hand, sold to local wholesalers and distributors as well as wholesalers/distributors in distant, major metropolitan areas. None of the interviewees reported any international sales.

Other Outlets

Beyond these large wholesale sales outlets, interviewees reported myriad other outlets for their production. Some farming operations sold to smaller local produce retailers but these sales appeared to be based on long and well-established working relationships. Others relied almost solely on roadside stand or on-property sales, while still others moved at least a portion of their production through farmers markets. Several of the interviewees either had already established or were attempting to build relationships with local chefs to sell their output directly to local or regional restaurants.

A number of operations had experimented with Community Supported Agriculture (CSA) programs with varying results – in some instances CSAs represented close to half of their sales while other interviewees had abandoned sales through CSA channels, viewing it as too labor and/or time intensive for the revenue it generated in their particular case.

Remarkably, nearly all interviewees reported moving some products through local food banks, shelters or other charitable organizations. Some operations opened their fields for gleaning, in some instances multiple times per month during the growing season, while others provided their surplus production to the food banks. The organizations most frequently mentioned in this regard

were House of Hope, and CROS Ministries locally, and the Treasure Coast Food Bank in Ft. Pierce, Florida.

Labeling "Local"

All of the smaller growers and producers indicated that they liked to promote and sell their output as "local" (or at least "produced in the U.S.A." in the case of one interviewee), which makes sense since most of their sales were in local or regional markets. Similarly, smaller growers tended to be more concerned about promoting and supporting local food initiatives. Larger growers were not as concerned about the "local" distinction since most of their production is sold to final consumers outside of the local region.

Production Diversity

There was a great deal of diversity in terms of major crops reported by the interviewees. While several producers reported focusing on one or two crops/products, one grower reported producing more than 80 different crops on their farm. Interviewees reported thirty-four different crops as being among their most important. The list of these crops is included in Table 1.

Post-harvest processing of products for smaller growers was typically limited to washing, drying and basic refrigeration, possibly with some grading/sizing and packaging.

Table 1. Major crops and products identified by interviewees.

Avocados	Cauliflower	Kale	Radishes
Bananas	Chard	Leafy greens/salad mix	Scallions
Beans	Citrus	Mangoes	Shrimp
Beets	Collards	Mustard greens	Strawberries
Black eyed peas	Cucumbers	Okra	Squash
Bok choy	Eggplant	Peaches	Sweet corn
Broccoli	Ginger	Peppers	Tomatoes
Cabbage	Herbs	Potatoes	Turmeric
Carrots	Hot Peppers		

Most of the interviewees reported that their production seasons generally coincided with those published by the Florida Department of Agriculture and Consumer Services (see end of Appendix 1), although some felt that their seasons might be a bit longer.

Food Deserts

Interviewees were asked if they would be interested in selling their products to a local wholesale distributor who is targeting its sales efforts to provide improved food access to underserved communities. Most did not understand this question as the majority of the interviewees already provide food to local food banks and other organizations helping those in need, either by donating surplus production or allowing gleaning in their fields. The typical response to this question was something like "We already donate to local organizations who do this."

The idea of a wholesaler being willing to pay for crops to try to provide food assistance did not seem realistic to most. Several responded that if they could sell their surplus instead of giving it away, that would be good. Others felt like these wholesalers would, by necessity, want to pay far less than market prices to provide food to underserved communities, and they wouldn't be able to afford selling for prices lower than they already do. Still others balked at the idea of cutting off their supplies of food they already donate to local organizations trying to help citizens in the community who were food insecure.

Food Hub Potential

Drawing upon reference materials from USDA and other sources[3], the following was provided to the interviewees as a comprehensive definition of a food hub:

> "A centrally located facility with a business management structure to facilitate the aggregation, storage, processing, distribution and/or marketing of source-identified, locally/regionally produced food products to strengthen the ability of small producers to satisfy wholesale, retail and institutional demand."

When interviewees were asked if they felt that there would be any benefit to them from working with a "food hub" if one were open in or close to Martin County, responses varied widely. Some interviewees indicated no interest, while others expressed limited interest for helping to move their surplus production, and still others were very supportive and thought it could be a big help to their marketing programs and efforts to strengthen local food markets.

Among those who expressed less enthusiasm for the idea of a food hub, as discussion on the topic progressed, most of them eventually acknowledged that a food hub could be beneficial, although the nature of these perceived benefits differed widely among the interviewees. For example, for smaller growers, transportation constraints were more of an issue than for larger

[3] "The Role of Food Hubs in Local Food Marketing" at https://www.rd.usda.gov/files/sr73.pdf and "Getting to Scale with Regional Food Hubs" at https://www.usda.gov/media/blog/2010/12/14/getting-scale-regional-food-hubs.

growers. Therefore, in terms of the aggregation function, among smaller growers there was a general consensus that it would be important for a food hub to provide pick-up/delivery services.

Some also felt that the processing capability would be valuable and several mentioned the commercial kitchen for food processing at the Treasure Coast Food Bank (TCFB). One grower suggested that before any investment was contemplated for a similar processing facility in Martin County, some research should be done to see how busy the TCFB kitchen was and if it generated any profits. They went on to say that it might make financial sense to transport products to the TCFB facility for processing rather than duplicate investment in Martin County, although they did note that transportation costs money and that alternative might not be economically feasible.

None of the growers were able to offer specific ideas on what crops they might be interested in moving through a food hub, except one interviewee who said maybe some of their tropical specialty products.

Other potential benefits of a food hub that were identified included:

- Could be very beneficial for marketing, especially for new growers, or small growers in rural areas who don't have access to or contacts with markets.
- Additional infrastructure and marketing assistance could be good since farms understand growing and post-harvest, but don't always have proper storage capability or marketing expertise.
- It might be a way to sell excess products.
- Such a facility might help provide supplementary value-added processing, which could be a key for small producers.
- A food hub could potentially help address small production volumes from individual growers through the aggregation function, thus helping growers to supply buyers who demanded larger volumes than those typically produced by a single small grower.

Conversely, one grower stated that they thought that the aggregation function would not be worthwhile to try to satisfy demand from retail grocery chains as the goal for retail groceries is to simply buy at the lowest price possible, and they don't care about local sourcing. When it was pointed out that some grocery chains do, indeed, try to sell local produce when they can, the grower responded that getting sufficient volumes to satisfy a chain store would be problematic. Follow up discussion regarding how food hubs can potentially address the issue of low supplies through aggregation from a number of growers was not readily embraced in this case.

Another concern expressed by several growers was that they could not afford to sell their product for anything less than the prices they are currently charging and they were concerned that there wouldn't be enough margin left for the food hub to cover its direct costs and overhead.

Other concerns or potential drawbacks identified included:

- They're not interested in paying sales overhead for a food hub since they already have to pay for their own sales efforts.
- They already do all of the post-harvest processing that they need.
- They already do all of their own processing, they have an established network for their sales and they are not interested in expanding their operation.

When asked how much expansion they might be able to achieve or how many new workers they might be able to employ if a food hub were to open in Martin County, none of the interviewees seemed able or willing to provide specific numbers. Even those who were enthusiastic about the idea of a food hub did not seem confident in predicting by how much they might be able to expand their operations. Given that, as stated previously, the average number of employees at the small farms interviewed in peak season was only 11 people, the employment impacts of the opening of a food hub might not be expected to be very large. There would be the direct employment at the food hub facility itself, but beyond that, the employment impacts on farms might be expected to be limited.

With respect to a physical facility, one interviewee observed that the Louis Dreyfus citrus processing facility outside of Indiantown was for sale and that it had to have a lot of refrigeration capacity and infrastructure. Plus they pointed out that there was a lot of labor available in Indiantown, so this might be an attractive possible location and facility for a food hub. However, being several miles northwest of Indiantown, this facility would not be well located strategically for many small growers or potential customers; as such, it would require considerable transportation organization. Also, it is not known if the refrigeration equipment and other infrastructure from the plant has already been removed. Nevertheless, this facility is a notable asset for potential development in the context of this study.

One interviewee observed that it would be important to have a market research component to a food hub to help identify crops and products that are in demand. This could also involve market intelligence to monitor pricing and shipping patterns to help growers figure out what to grow and when.

One grower described the Treasure Coast Food Bank as a type of food hub, and they said that Cheney Brothers funded the creation of this facility to the tune of $3 to $4 million. (Neither this cost estimate nor the involvement of Cheney Brothers, Inc. in the funding of the facility have

been confirmed.) This grower observed that, because of the high cost involved in creating a food hub, perhaps people should think in terms of regional food hubs rather than one for each county[4]. The grower concluded by observing that if Martin County wants to create its own food hub it needs to make sure that it is well funded.

Finally, one of the interviewees actually seems to be beginning the development of what could be a food hub for Martin County. Initial site work is underway, and the stated goal for development of the property has many of the characteristics of a food hub.

Farm Incubator Program

For purposes of discussion, interviewees were asked for their opinions of a farm incubator program for Martin County. If they were not familiar with the concept of such a program, they were provided with the following definition:

> A farm incubator program can be described as "A land-based, multi-grower project that provides training and technical assistance to aspiring and beginning farmers." The goal of farm incubators is to help "beginning farmers to get started running successful, sustainable small farm enterprises" (Farm Incubator Toolkit).

There was a great deal of passion and support for local farming and local food observed among the small farm interviewees. Therefore, it is not surprising that there was considerable interest among small farmers in a farm incubator program. Training and support for young farmers was seen as being critical to the continuation of small farms and local food supplies in Martin County. One interviewee observed that it would have to be well funded to be successful, while another thought that it would work particularly well if it could be established in conjunction with and on the same property as a food hub.

It was suggested that as part of a farm incubator program, it would be good if a group of successful business professionals could be identified to act as consultants for new farmers and new farming operations to assist them with developing marketing and management plans.

One small farmer interviewee observed that the old model of buying land and starting a farm from scratch was gone because it could easily take $1 million to buy land, get the necessary permits and approvals, meet zoning and land preparation regulations, install the necessary equipment and infrastructure, etc. This farmer felt that a farm incubator program might enable a

[4] Indeed the mission statement of the Treasure Coast Food Bank is "to alleviate hunger by obtaining and distributing food and other essentials in Indian River, Martin, St. Lucie and Okeechobee counties" (https://stophunger.org/our-story).

serious dialogue about the challenges of maintaining a local food supply given the challenges of starting new farms.

Other Observations

In the course of the interviews and related discussions a number of observations were offered that went beyond the scope of the interview questions themselves but which were very relevant to the topic at hand.

One of the most consistently articulated concerns was related to the critical need for local government officials to appreciate the importance of farming and small farms to the Martin County economy. In particular, they wanted local government to consider farms when making and implementing regulations and policies related to land use. It was the opinion of most small farmers that county regulations presently appear to be designed to disfavor small farmers.

One grower specifically mentioned that they feel like the Martin County Comprehensive Plan is a good thing and they honor it, but it seems like agricultural land use regulations are unclear and these regulations seem to regularly be interpreted in ways that do not help small farmers. A number of growers expressed their feelings that local officials need to be flexible and allow land owners in both rural and urban areas to use their land for agricultural and farming operations to make a living and to help provide economic prosperity and opportunity in Martin County.

Some interviewees indicated that the situation is slowly improving concerning county officials understanding the concerns of farmers, but others indicated that they have not seen a change. One interviewee suggested that the county needs to have a representative for agriculture in their growth management department so this person can better represent and articulate the concerns of farmers and ranchers.

Another interviewee suggested that the county should consider setting up a program to "certify" growers and vendors as being reliable – sort of a county Better Business Bureau program. They felt that being on this list could help farmers in their marketing (an area where farmers don't always have a lot of expertise) and it would help purchasers (restaurants, wholesalers, etc.) know who the reliable suppliers are.

2.) DEMAND SIDE INTERVIEWS

Demand side interviews were conducted with wholesale distributors, large institutional buyers, retail produce markets and restaurants. The questionnaire used for the demand side interviews is contained in Appendix 2. This section will report findings from the interviews, and conclude with additional observations offered by the interviewees.

Local Food and Local Sourcing

All interviewees expressed some degree of interest in locally produced agricultural products, although the extent of their interest varied. Smaller purchasers tended to have a more significant commitment to sourcing and providing local produce and products whenever possible.

Larger purchasers, on the other hand, identified a number of challenges involved with sourcing local agricultural products including logistical problems associated with sourcing locally-produced items from small farms, the relatively small volumes of local produce available as compared to their overall requirements, and limited seasonal availability.

Although the sample size was limited, the interviews suggested that the stronger the commitment a purchaser has to providing local food items, the stronger the working relationships they have developed with local farms and growers. Smaller volume purchasers seemed to be better able to (or perhaps were more willing to) work around some of the constraints identified by larger purchasers. For example, since smaller restaurants require lower volumes of produce, they tend to be more willing to deal with logistical issues associated with local sourcing (i.e., delivery or pick up); also, they are able to adjust their menus more easily than large restaurants based upon what local produce items were available.

There was only very limited discussion among interviewees related to local sourcing of meat or protein products.

Smaller purchasers reported that they do not have a formal process for soliciting bids for their fruit, vegetable, potato and meat/protein product requirements, and that they do not use annual contracts for their purchases.

Nearly all interviewees reported purchasing at least some products from large institutional vendors. All interviewees indicated that they vary their sources of supply throughout the year; for example, even those strongly committed to local sourcing have to purchase from outside the area in certain seasons of the year when local supplies are not available.

Interviewees generally reported that large institutional vendors typically were not able to supply locally-produced products to their customers. Erneston Produce in Stuart, a local full-line food distributor, was mentioned often. They appear to serve as a bridge between local growers and those interested in purchasing local products. They offer a wide range of products to serve larger volume purchasers, but also were reported to have a commitment to try to provide locally-sourced products as well.

Defining "Local"

A considerable number of research studies have shown that opinions vary widely on what constitutes "local" food. For example, some respondents consider food to be local only if it comes from farms in very close proximity (perhaps a 30 to 50 mile radius), while others consider food from a general region, or perhaps anywhere in a given state to be "local" and still others even consider food from nearby states as "local."

In the surveys conducted for this study with demand-side market participants (but not individual consumers, whose responses from the telephone surveys will be reported separately), interviewees reported a much narrower definition of what they consider to be "local" food. Generally, they considered "local" products to be those grown in Martin County and nearby counties like Indian River, Okeechobee, Osceola, Palm Beach and St. Lucie counties.

Some interviewees observed that when they want to purchase organic products they often have to purchase from wholesale suppliers as far away as Sarasota and Miami, and they acknowledged that the original source of the organic products they purchase from these vendors could well be from outside of Florida or perhaps even from foreign country suppliers.

Emphasis on Local Sourcing

Retail produce market and restaurant interview respondents indicated that their emphasis on purchasing locally has been a focus for a number of years. A few reported that their emphasis on local sourcing has increased in recent years. However, none of them reported being able to source local products from large institutional vendors, generally relying instead on direct contact with local farmers.

All interviewees indicated that they expect their emphasis on sourcing local products to remain either steady or increase in the years ahead.

Pricing Issues

Smaller purchasers reported that they are willing to pay a little more for local produce. Reasons included the higher quality of locally produced items, the fact that local products were easier to work with in the food preparation process, longer shelf life (which minimizes waste), and/or their desire to support local producers and businesses. One institutional purchaser indicated that budget constraints would not allow them to pay more for local produce items.

Only one interviewee, however, was willing to provide an approximate percentage for the maximum price premium they would be willing to pay for local – that figure was 10 percent.

Several pointed out that they have to keep costs in mind when considering pricing for their menu offerings.

Local Logo or Branding

A number of the interview respondents indicated that they thought a brand or logo for locally-produced products would be of interest to them. Several reported that while they promote their locally-sourced items already, they thought that a local logo or local branding could be an additional promotional tool. Those who did not think the idea of a local brand or logo would be beneficial felt that their established reputation and/or current promotional programs were adequate. Only one interviewee indicated that they use the Fresh From Florida program, which was somewhat surprising given that the program includes non-paid membership access to the logo for " . . . retailer, grocery store, roadside produce stand, farmers market, garden center, restaurant, and seafood/aquaculture" outlets (http://www.freshfromflorida.com/Divisions-Offices/Marketing-and-Development/Agriculture-Industry/Fresh-From-Florida-Industry-Membership).

One interviewee mentioned the Stuart "shop local" promotional program as a possible promotional tool although it is not targeted at food products. Another mentioned the potential for use of a Treasure Coast brand or logo.

Challenges to Local Sourcing

Seasonality was mentioned by all interviewees as a problem they encountered in sourcing local supplies of fruit, vegetables and potatoes, although all recognized that these and other potential weather-related constraints (e.g., hurricanes) were unavoidable. Larger purchasers also reported problems with finding sufficient volumes of local produce to meet their requirements.

There seemed to be some uncertainty about whether or not "local" beef products were really raised on nearby ranches (and sent away for processing then returned) or if some of these products might have been raised elsewhere and were simply being sold under a local brand.

Priority Purchasing Criteria

Interviewees were asked to rank the following eight product characteristics in terms of relative importance in their food sourcing and purchasing decisions:

- Cost
- Ease of purchasing
- Locally-grown

- Organic
- Quality
- Sustainability
- Variety
- Year-round availability.

Respondents typically had difficulty ranking the characteristics. The reasons stated for this difficulty were related to the fact that decisions were made on the basis of the need to balance some or all of the factors listed. Several interviewees declined to provide rankings. Only one respondent attempted to rank all eight characteristics, and multiple respondents ranked several characteristics as being of equal importance. The responses of the interviewees who provided rankings are shown in Table 2.

Table 2. Stated Rankings for Product Characteristics in Food Sourcing and Purchasing Decisions.

Rank	**Respondent 1**	**Respondent 2**	**Respondent 3**	**Respondent 4**
#1	- Quality - Locally grown	Quality	Quality	- Quality - Locally grown - Organic
#2	Year-round availability	Variety	Cost	- Cost
#3	Cost	- Cost - Locally grown	Locally grown	
#4	Variety		Organic	
#5	Ease of purchasing		Variety	
#6	- Organic - Sustainability		Ease of purchasing	

All of the characteristics were mentioned as important by at least one respondent. For all respondents Quality was ranked as the most important or one of the most important characteristics. Locally Grown ranked either first or third among the respondents. Cost was ranked as either the second or third most important criteria. Organic ranked as one of the most important criteria for one respondent, the sixth most important for another and it wasn't listed by the other two. Variety and ease of purchasing were also reported as important by several respondents, while sustainability was ranked by only one person.

Products Purchased in the Largest Volumes

In asking about the 10 fruit, vegetable, potato, meat and protein products purchased in the largest volume, interviewees provided a wide range of responses. Their responses are listed in Table 3 in alphabetical order. Items mentioned with the most frequency are identified with an asterisk (*).

The items identified are not all necessarily produced locally – for example, apples, asparagus, cashews and grapes. Other items such as jack fruit, blueberries and pineapple could potentially be produced locally although the interviews conducted with farmers for the project did not reflect local production of these products.

Table 3. Products Identified by Interviewees as Being Purchased in the Largest Volume.

VEGETABLES AND POTATOES	FRUITS
Asparagus	Apples
Carrots	Bananas*
Cauliflower	Blueberries
Collards	Grapes
Corn	Jack fruit
Cucumber*	Pineapples
Greens (various salad)*	Strawberries
Kale	**PROTEIN**
Peppers	Beef
Potatoes	Cheese
Swiss chard	Chicken*
Tomatoes (standard and specialty)*	Eggs
Zucchini	Egg patties (processed)
	Milk
	SPECIALTY
	Cashews
	Ginger
	Honey

New Suppliers

All demand side interviewees indicated that they would be interested in new suppliers of fruits vegetables, potatoes, protein, and/or meat products.

Anticipated Future Trends

The question about projected future food purchasing trends generated a wide range of responses and stimulated broad discussion. The general opinion expressed by nearly all interviewees was that they expect interest in healthful eating habits and healthy food choices to continue to expand. Therefore, most reported that they anticipate the level of interest in and demand for local foods among consumers to increase significantly in the years ahead.

References were also made to consumer demand driving possible local production of nutraceuticals products, natural immunotherapy food supplements, and even possibly the production of medical marijuana.

Other notable projections included:

- An increase in organic production to address demand.
- An increase in production of specialty items to supply niche markets, which could help provide higher returns for growers.
- A transition to wider offerings of pre-cut and bagged produce (made by a large institutional purchaser).
- The need to go back to old production methods for raising poultry to recover better flavor and texture of the meat, even if this results in smaller cuts.

Detailed Purchasing Data

None of the interviewees had the ability or the willingness to share data on their fruit, vegetable, potato, protein or meat purchases.

Other Topics

In the course of both the demand and supply side interviews, a number of other important issues were raised that addressed topics other than those specifically covered in the interview questions. One theme that arose on multiple occasions during these discussions was the continued pressure on farmland for commercial and residential development. Related to this was the concern about zoning regulations being so restrictive as to limit the ability of farmers to produce on their land. It is interesting that these concerns were recognized by demand side interviewees in addition to the supply side interviewees/farmers. This could be attributed to demand side interviewees being so closely tied to their farmer/suppliers that they (the buyers) are echoing some of the frustrations that they have heard from their farmer/suppliers.

A large institutional buyer indicated that local producers don't seem to understand that they can often buy/utilize smaller quantities of food that might be surplus on fairly short notice, and that they may sometimes have the flexibility to purchase supplies that are slightly blemished. This could be an important outlet for local small farmers. A food hub could perhaps help channel these products to the large institutional buyer and other potential markets.

Several of the interviewees also indicated that they periodically had surplus food that they wanted to donate to food banks and/or homeless shelters but that they weren't able to do so because of regulations regarding donated food supplies. This was a source of considerable frustration as it resulted in food being wasted that could have gone to people in need.

(New section begins on the following page.)

3A.) CONSUMER SURVEYS—FRESH FRUITS AND VEGETABLES

The survey instrument used for consumer telephone surveys can be found in Appendix 3 to this document.

Fruit and Vegetable Consumption

Not surprisingly 97 percent of respondents to the consumer survey reported that they eat both fruits and vegetables. In both cases, the vast majority of the respondents indicated that they most often purchase fresh fruits and vegetables. Breakdowns of purchases by type are contained in Figures 1 and 2.

Figure 1. Fruit Purchases by Type.

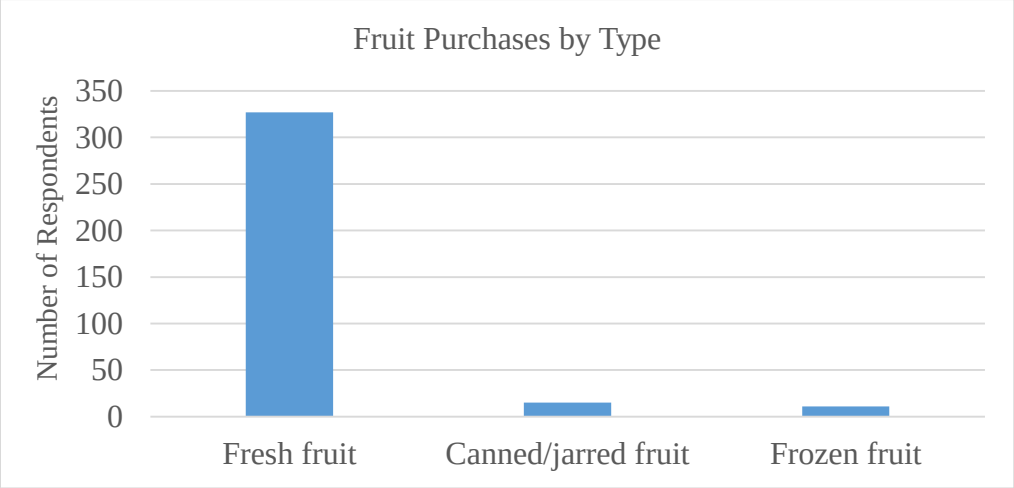
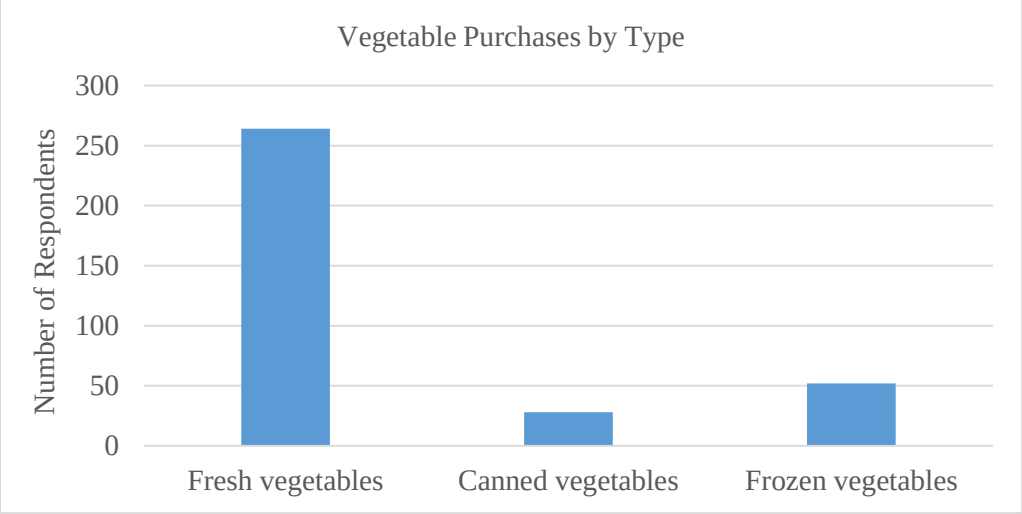


Figure 2. Vegetable Purchases by Type.

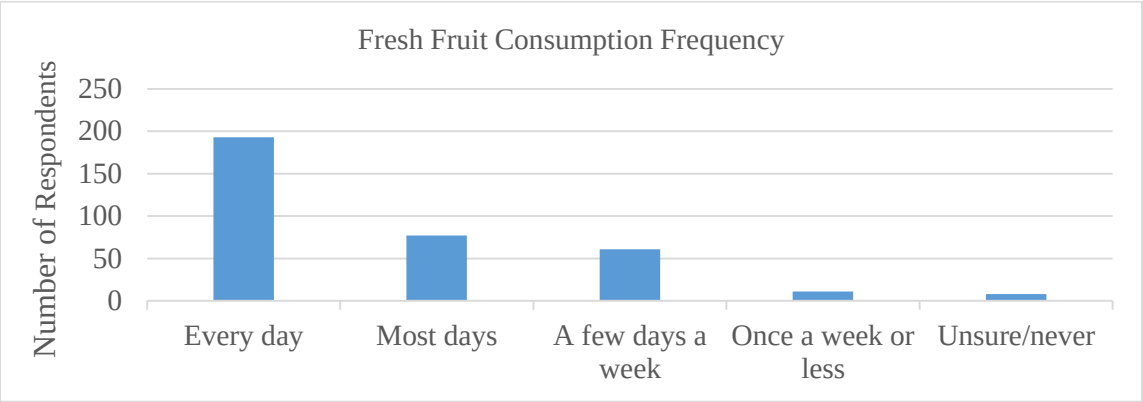


In cases where consumers did not eat fruits or vegetables, they reported that it was because they did not like them; there were no responses about them being too expensive, lack of availability of the varieties that they like, difficulty getting to the store, or because of dietary restrictions.

Fresh Fruit Consumption Frequency

Over three-quarters (77%) of respondents reported that they eat fresh fruit every day or most days (Figure 3). Only 5% of respondents indicating eating fresh fruit less often than once per week.

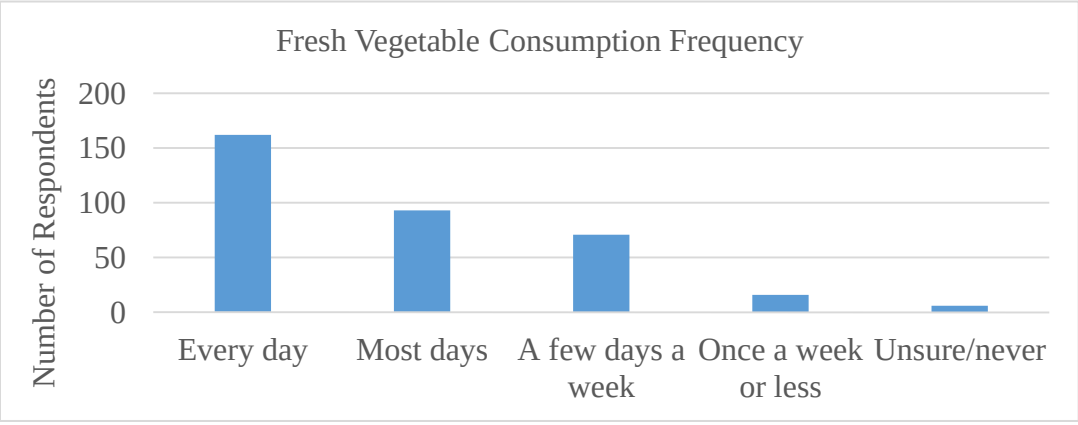
Figure 3: Fresh Fruit Consumption Frequency.



Fresh Vegetable Consumption Frequency

Similar to fresh fruit consumption, nearly three-quarters (73%) of respondents indicated that they eat fresh vegetables every day or most days (Figure 4). Only 7% indicate they eat fresh vegetables less often than once per week.

Figure 4. Fresh Vegetable Consumption Frequency.



Vegetables and Fruits Consumed on a Regular Basis

Respondents were asked which of a specific list of fruits and vegetables they ate on a regular basis. Responses are shown in Table 4. Of the products, tomatoes and lettuce were the most frequently consumed products, with 88 percent of survey participants indicating that they consumed both of these items regularly. Cabbage was the only item for which regular consumption was reported by less than half of respondents (46%).

When asked whether or not they consume as many fresh fruits and vegetables as they would like, 71% indicated they do.

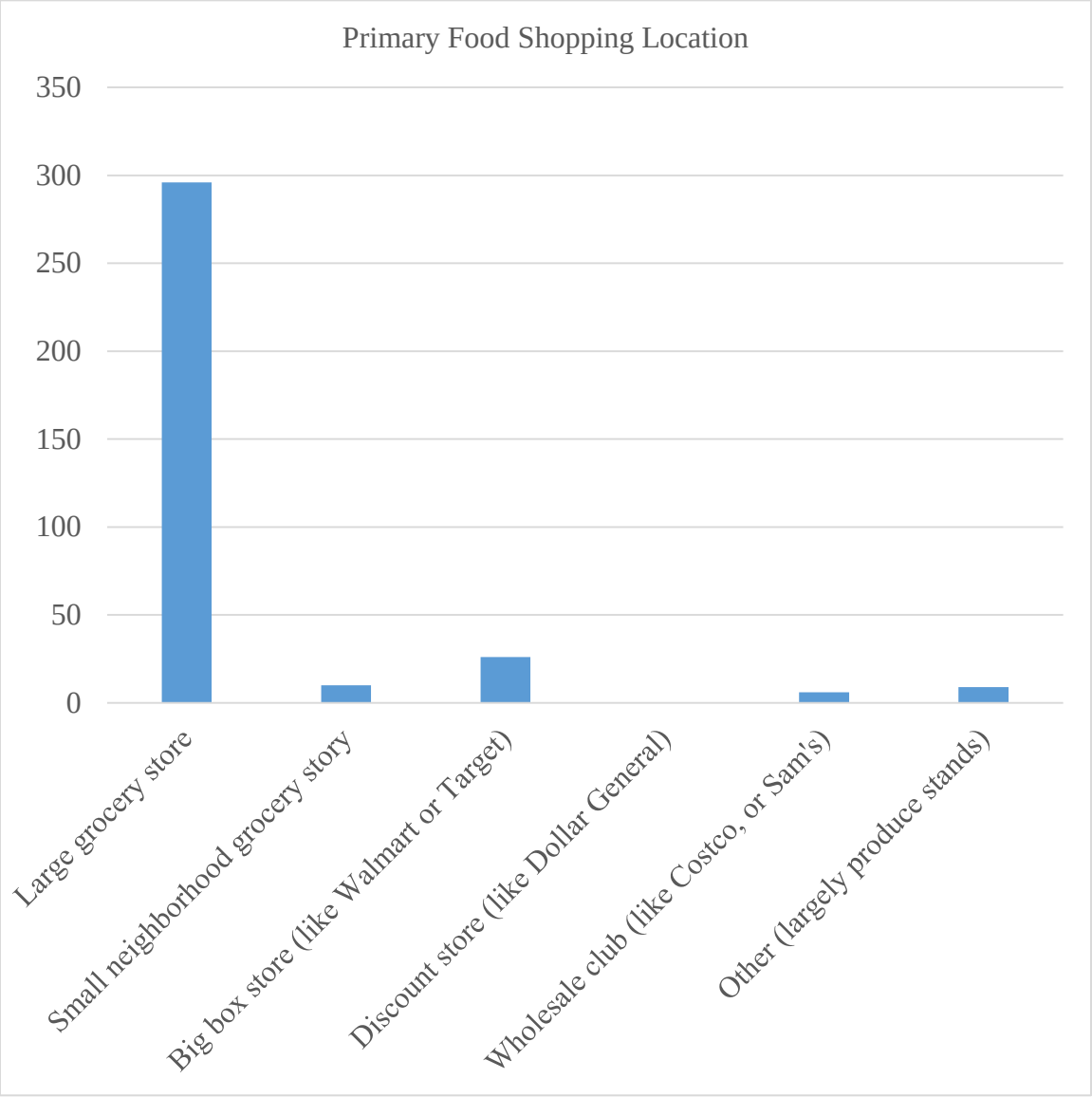
Table 4. Vegetables and Fruits Eaten on a Regular Basis in Season.

VEGETABLES AND FRUITS EATEN ON A REGULAR BASIS IN SEASON	YES		NO
	# of responses	percentage	
Tomatoes	309	88%	41
Lettuce	309	88%	41
Onions	302	86%	48
Citrus fruits (like oranges, grapefruit, etc.)	289	83%	61
Potatoes	284	81%	66
Carrots	276	79%	74
Tropical fruits (like pineapple, mango, etc.)	271	77%	79
Greens	262	75%	88
Celery	257	73%	93
Green beans	255	73%	95
Bell peppers	253	72%	97
Cucumbers	241	69%	109
Corn	241	69%	109
Cabbage	161	46%	189

Food Shopping Locations

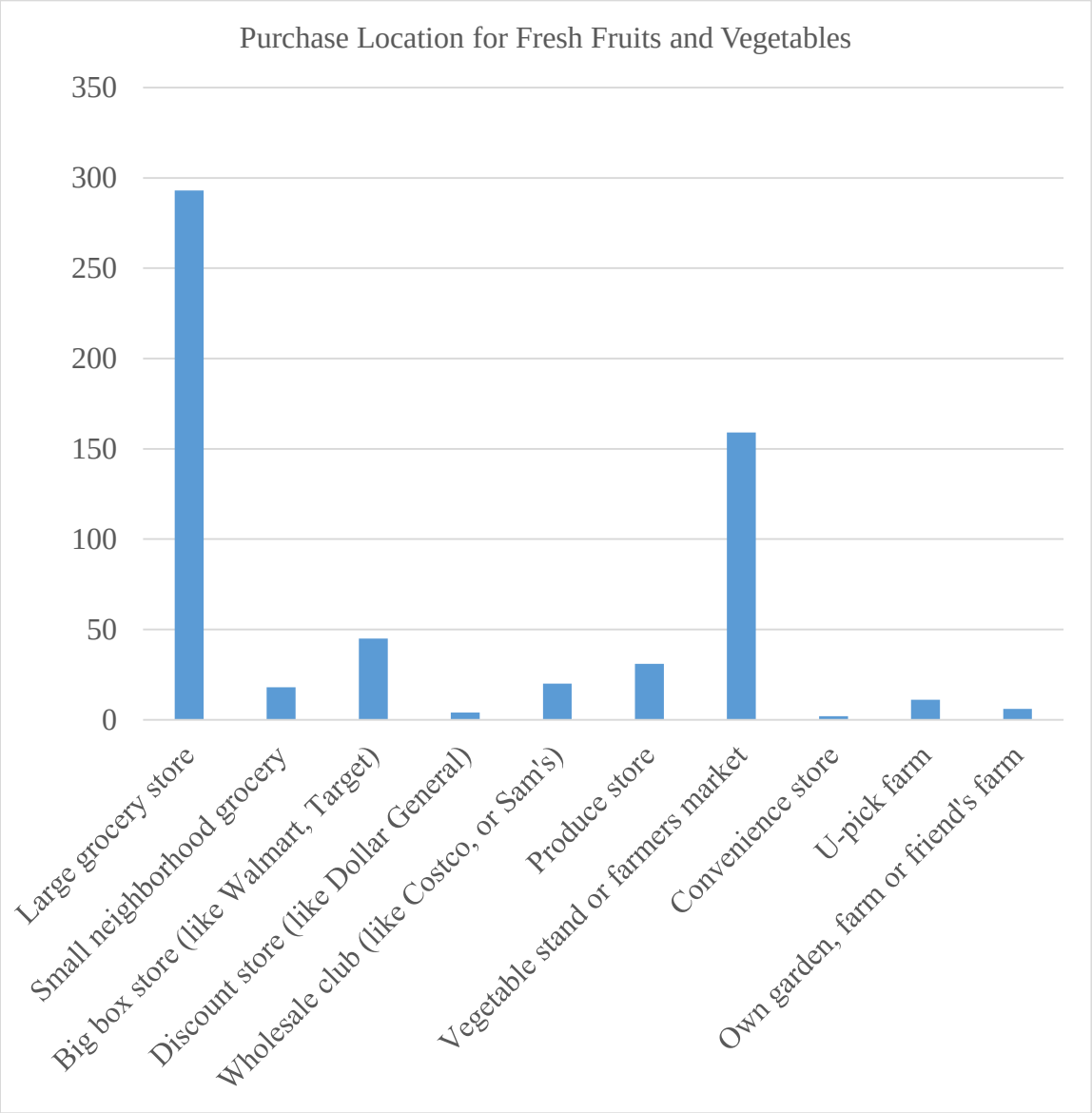
Respondents were asked to identify where they typically do most of their food shopping. Nearly all (85%) indicated large grocery stores (Figure 5). Big box stores added another 7% of the respondents, meaning 92% shop at large retail outlets for most of their food purchases. A number of the “other” responses indicated produce stands, which suggests that they misunderstood the question – instead of responding about where they did most of their food shopping, they apparently responded in terms of where they shopped for most of their fresh fruits and vegetables.

Figure 5. Primary Food Shopping Location.



In a following question, respondents were asked to identify where they purchase fresh fruits and vegetables (Figure 6). Again, the most popular response was large grocery stores. Vegetable stands and farmers markets were the second largest source of fresh fruits and vegetables for respondents. Note that unlike the primary shopping location, for fruits and vegetables, respondents were able to identify all locations they purchased these products.

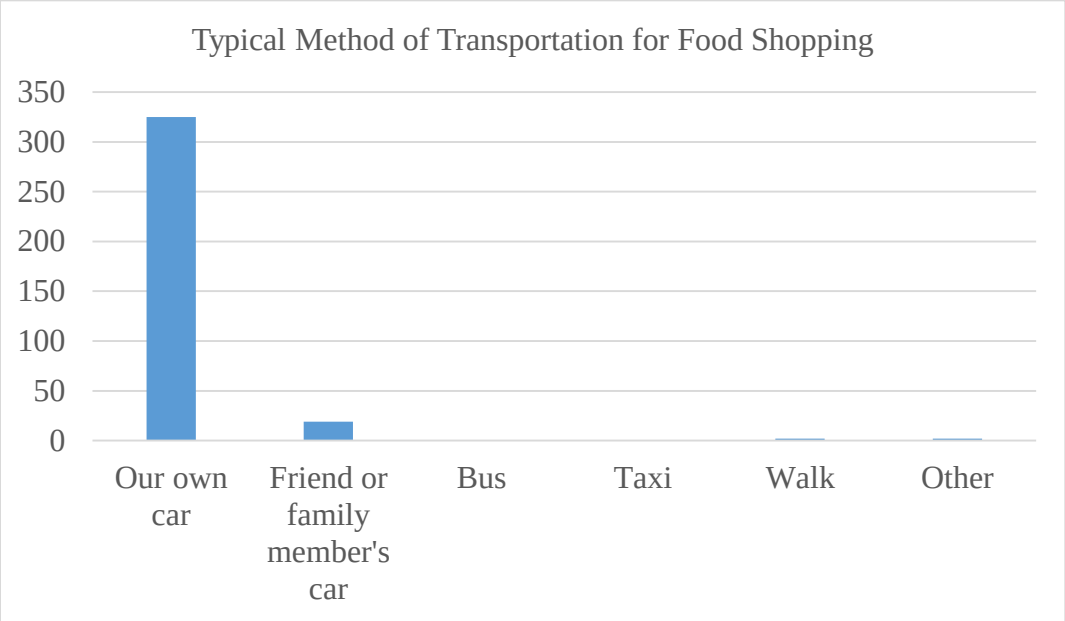
Figure 6. Purchase Location for Fresh Fruits and Vegetables.



Typical Method of Transportation for Food Shopping

Nearly all (93%) of respondents indicated that they used their own vehicle for transportation related to food shopping, while another five percent reported that they used a vehicle belonging to a friend or other family member (Figure 7). Only two people reported walking to the store, while one uses a shuttle from their assisted living facility, and another uses a handicap scooter.

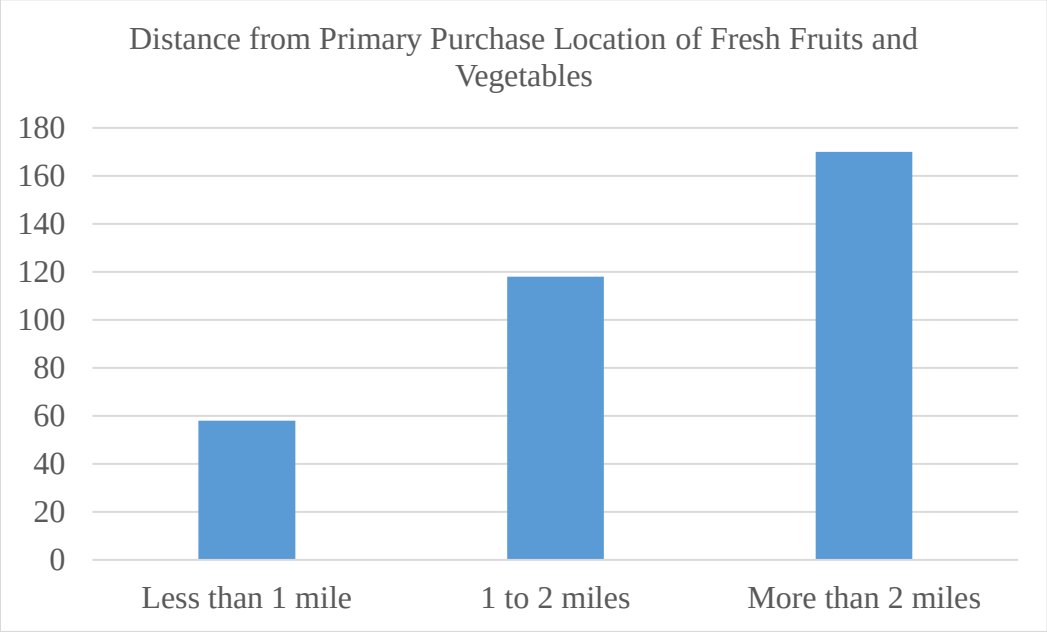
Figure 7. Typical Method of Transportation for Food Shopping.



Distance from Primary Purchase Location

Just over 50% of respondents reported that they lived within two miles of the location where they primarily purchase their fresh fruits and vegetables (Figure 8).

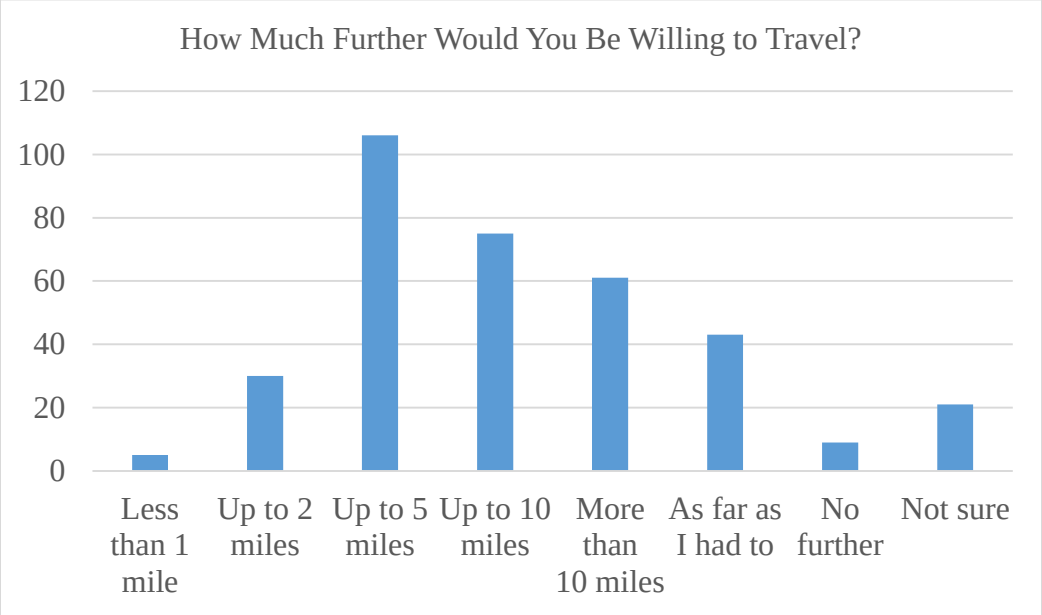
Figure 8. Distance from Primary Purchase Location of Fresh Fruits and Vegetables.



How Much Further Would You Be Willing to Travel?

Respondents were then asked if fresh fruits and vegetables weren't available at the store where they primarily shop for them, how much further would they be willing to travel to purchase fresh fruits and vegetables. Ten percent of the respondents indicated that they would not be willing to travel more than 2 miles to continue purchasing these items (Figure 9). On the other hand, 30% reported that they would travel up to 5 miles to purchase fresh fruits and vegetables, and another 21% said that they would travel up to 10 miles. Finally, 17% of respondents indicated that they would travel as far as necessary to purchase fresh fruits and vegetables. Given that about half of respondents presently purchase most of their fresh fruits and vegetables within 2 miles of their home, the responses to this question suggest that there was a strong commitment among respondents for consumption of fresh fruits and vegetables.

Figure 9. How Much Further Would You Be Willing to Travel?



Constraints to Purchasing Fresh Fruits and Vegetables

Respondents were given a list of reasons that might constrain their purchases of fresh fruits and vegetables and were asked which, if any, might apply to them (Table 5). There were nearly 400 total responses to this question, as some respondents offered more than one possible constraint. The most significant constraint was that fresh produce is too expensive, with 40% of the respondents indicating this as a potential problem. Lack of availability of the varieties they like (21%) and dietary constraints (21%) were other important constraints. A sizeable group (21%) did not identify any constraints to their purchases of fresh fruits and vegetables.

Table 5. Constraints to Purchasing Fresh Fruits and Vegetables.

CONSTRAINT	NUMBER OF RESPONDENTS
Fresh produce is too expensive	141
Kinds I like are not available	73
I'm on a special diet	44
Fresh produce is not available where I usually shop	25
Too hard to get to a store that sells fresh produce	13
Takes too long to shop for fresh produce	9
No constraints	72
Not sure	64
Refused to respond	7
Other	7

Additional Factors Influencing Purchases

In an effort to get more information on factors influencing fresh fruit and vegetable consumption, respondents were next asked if they would eat more fresh fruits and vegetables if: there were locations closer or more convenient to purchase them; they were less expensive; and/or the quality was better. Respondents were permitted to identify more than one factor. The responses to these questions are summarized in Table 6. Over half (55%) of respondents indicated that both lower prices and higher quality would induce them to consume more fresh fruits and vegetables. Convenience was less important with less than one quarter of respondents identifying this factor.

Table 6. Additional Factors Influencing Purchases.

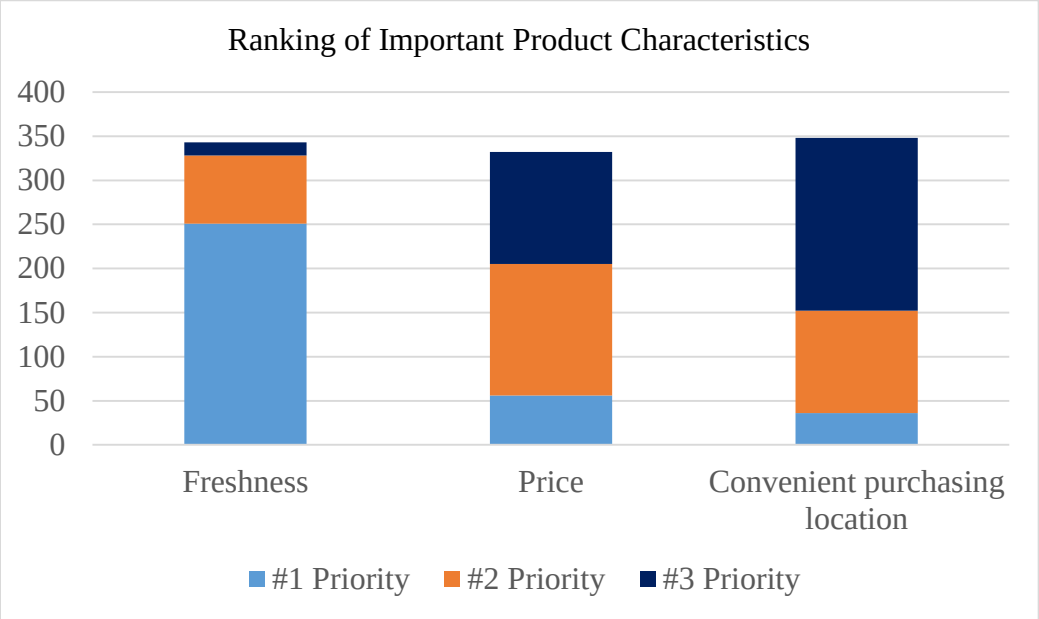
I WOULD EAT MORE FRESH FRUITS AND VEGETABLES IF:	NUMBER OF RESPONDENTS
They were less expensive	195
The quality was better	195
There was a closer and more convenient location to purchase	79

Ranking of Important Considerations for Fresh Fruit and Vegetable Purchases

Respondents were asked to rank three specific factors that they might take into consideration when purchasing fresh fruits and vegetables: freshness, price, and convenient purchasing location. The results for this question are contained in Figure 10. Freshness was the top priority

for respondents, with 72% indicating freshness is the most important consideration when purchasing fresh fruits and vegetables.

Figure 10. Ranking of Important Considerations for Fresh Fruit and Vegetable Purchases.



Home Production

Approximately one-third (32%) of respondents indicated that they have some source of home production of fresh fruits and vegetables, including gardens or a fruit tree or trees.

3B.) CONSUMER SURVEYS—MEAT, SEAFOOD, DAIRY PRODUCTS, AND EGGS

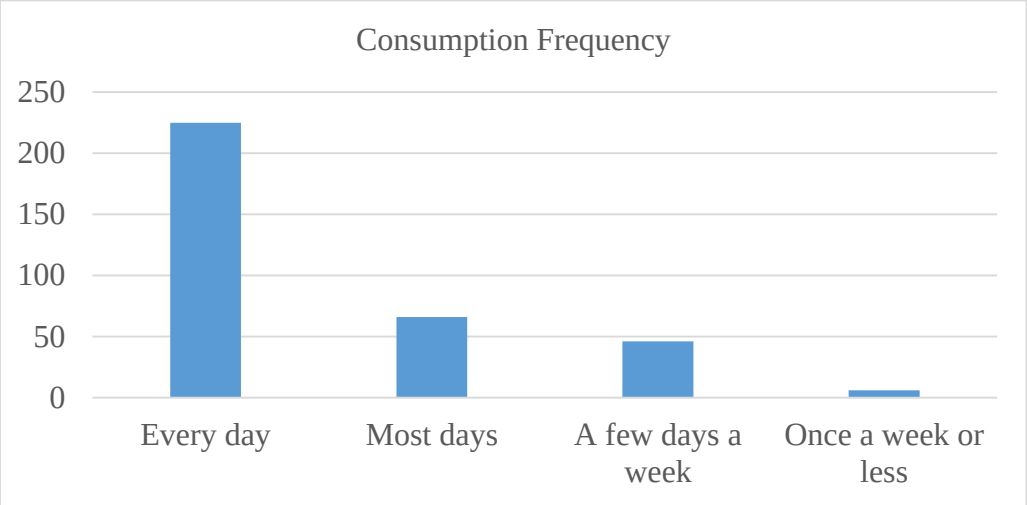
Consumption of Meat, Seafood, Dairy Products and Eggs

Nearly all (98%) of respondents indicated that they eat meat, seafood, dairy products and eggs. Of those who reported that they do not consume these products, the main reasons given were that they were vegan, didn't like the products, the products are too expensive or not available.

Meat, Seafood, Dairy Product and Egg Consumption Frequency

Nearly two-thirds of respondents indicated that they consume at least one of these products every day, while 19% of respondents reported consuming on most days and 13% reported consuming a few days a week (Figure 11).

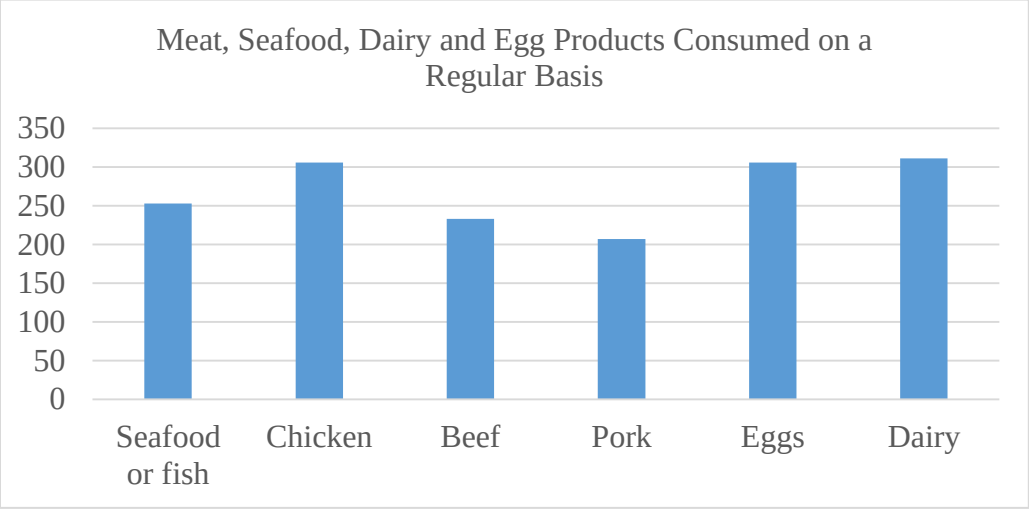
Figure 11. Meat, Seafood, Dairy Product and Egg Consumption Frequency.



Meat, Seafood, Dairy and Egg Products Consumed on a Regular Basis

Survey respondents were asked which items (among seafood or fish, chicken, beef, pork, dairy products and eggs) they consume on a regular basis. Results are displayed in Figure 12. Dairy products (including milk, yogurt, and cheese) were reported as being regularly consumed by the largest number of respondents (89%). This was followed closely by eggs and chicken (87% each), seafood and fish (72%), beef (67%) and pork (59%). Less than 10% indicated they do not consume as much of these products as they would like to.

Figure 12. Meat, Seafood, Dairy and Egg Products Consumed on a Regular Basis.



Shopping Locations for Meat, Seafood, Dairy Products and Eggs

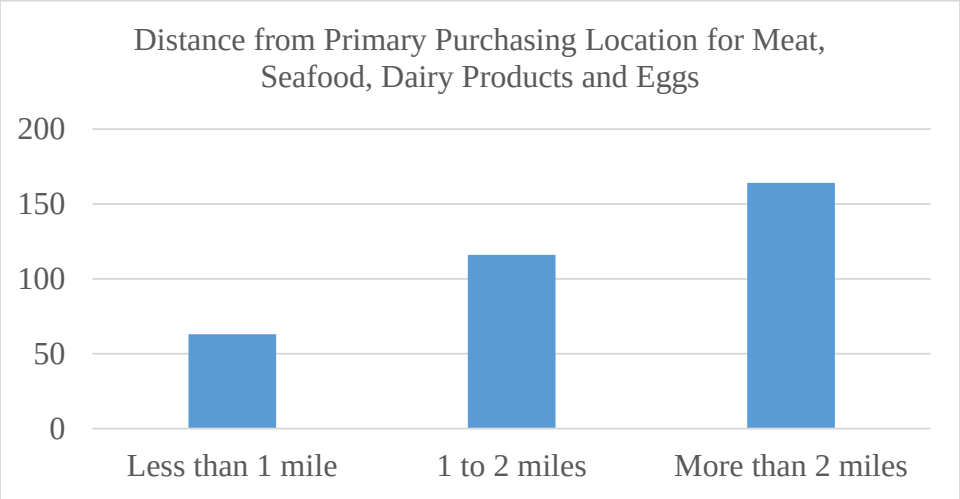
Most (88%) respondents indicated that they shop for meat, seafood, dairy products and eggs at large grocery stores, and another 15% said they purchase these products at big box stores. Seafood stores were also popular, with 16% reporting purchasing at these locations. Butcher shops, farm stands, wholesale clubs and small neighborhood groceries all were mentioned by less than 10% of respondents (Figure 13).

Figure 13. Shopping Locations for Meat, Seafood, Dairy Products and Eggs.

Distance from Primary Purchasing Location

As was the case for the data gathered regarding fruit and vegetable purchases, slightly over 50% of respondents indicated that they live within two miles of the location where they primarily purchase meat, seafood, dairy products and eggs (Figure 14).

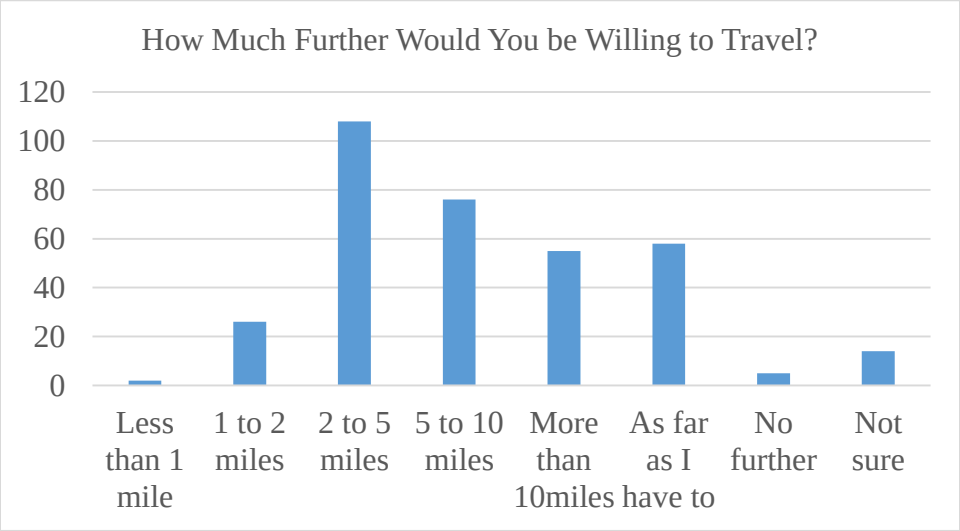
Figure 14. Distance from Primary Purchasing Location for Meat, Seafood, Dairy Products and Eggs.



How Much Further Would You Be Willing to Travel?

Respondents were then asked if meat, seafood, dairy products and eggs weren't available at the store where they primarily shop for them now, how much further would they be willing to travel to purchase these products (Figure 15). Less than half (39%) indicated that if their current primary shopping location for purchasing meat, seafood, dairy products and eggs was not available, they would be willing to travel up to 5 miles to shop for these items. Another 22% reported that they would travel up to 10 miles to purchase these products, while 16% and 17% would travel more than 10 miles and as far as necessary, respectively.

Figure 15. How Much Further Would You Be Willing to Travel?



Constraints to Purchasing Meat, Seafood, Dairy Products and Eggs

Respondents were provided with a list of reasons that might constrain their purchases of meat, seafood, dairy products and eggs and were asked which, if any, might apply to them. Respondents were able to identify as many constraints as they felt applied and there were over 400 responses from the 350 respondents. As was the case with fresh fruits and vegetables, the most significant constraint was that meat, seafood, dairy products and eggs are too expensive, with 53% of the respondents indicating this as a problem (Table 7). Other constraints included availability (19%) and dietary constraints (14%). No constraint was identified by 17% of the respondents.

Table 7. Constraints to Purchasing Meat, Seafood, Dairy Products and Eggs.

CONSTRAINT	NUMBER OF RESPONDENTS
Products are too expensive	185
Products I like are not available	66
I'm on a special diet	48
Products are not available where I usually shop	33
Too hard to get to a store that sells these products	19
No constraints	58
Not sure	53

Additional Factors Influencing Purchases

In an effort to obtain additional insights on factors influencing purchases of meat, seafood, dairy products and eggs, respondents were asked if they would consume more of these products if: there were locations closer or more convenient, they were less expensive, and/or the quality was better. The responses to these questions are summarized in Table 8. Cost was the constraint most often cited (52%) followed by quality (48%) and convenience (14%). Respondents were able to identify more than of these factors, and they provided nearly 400 responses.

Table 8. Additional Factors Influencing Purchases of Meat, Seafood, Dairy Products and Eggs.

I WOULD EAT MORE MEAT, SEAFOOD, DAIRY PRODUCTS AND EGGS IF:	NUMBER OF RESPONDENTS
They were less expensive	183
The quality was better	167
There was a closer and more convenient location to purchase	50

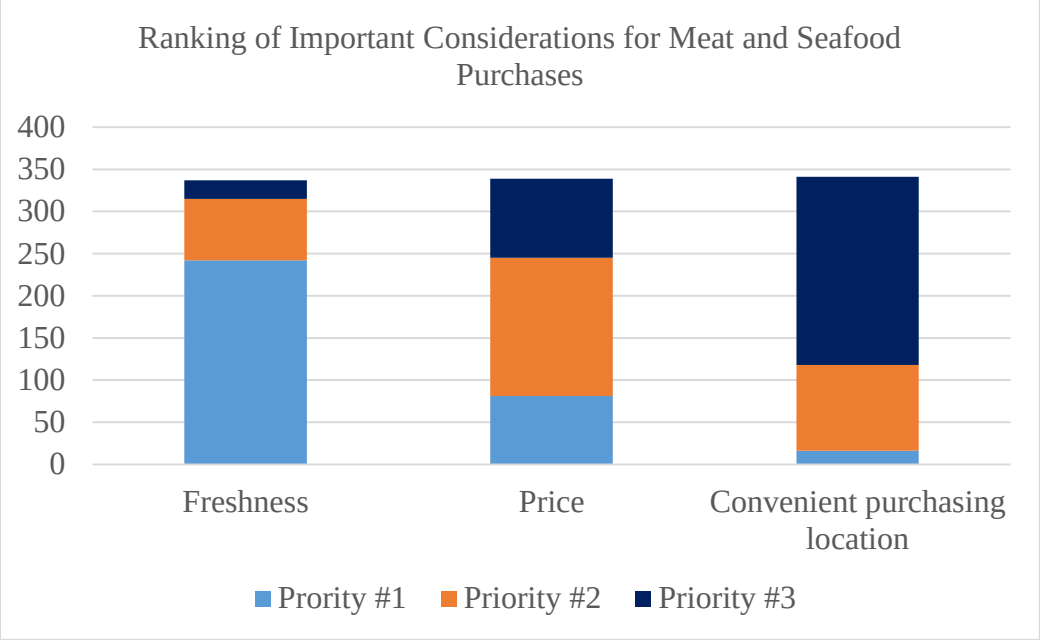
Home Production

Only 2% of respondents indicated that they have some source of home production of meat, seafood, dairy products or eggs.

Ranking of Important Considerations for Meat and Seafood Purchases

Respondents were asked to rank three specific factors (freshness, price, and convenience of purchasing location) that they might take into consideration when purchasing meat and seafood. Freshness was the top priority for respondents, with 69% choosing freshness as the most important characteristic of the three when purchasing meat and seafood (Figure 16). Price was second, followed by convenient purchasing location. This is consistent with the results in the previous question where price and quality were shown to be more important than convenience of purchasing location.

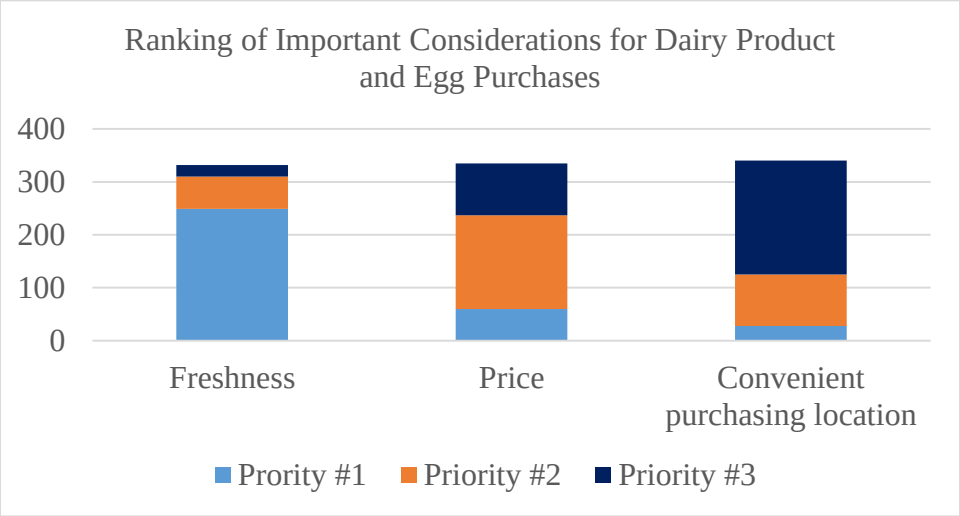
Figure 16. Ranking of Important Considerations for Meat and Seafood Purchases.



Ranking of Important Considerations for Dairy and Egg Purchases

Respondents were then asked to rank the same three factors (freshness; price; and convenience of purchasing location) when purchasing dairy products and eggs. Once again, freshness was the top priority for respondents, followed by price and convenient purchasing location (Figure 17).

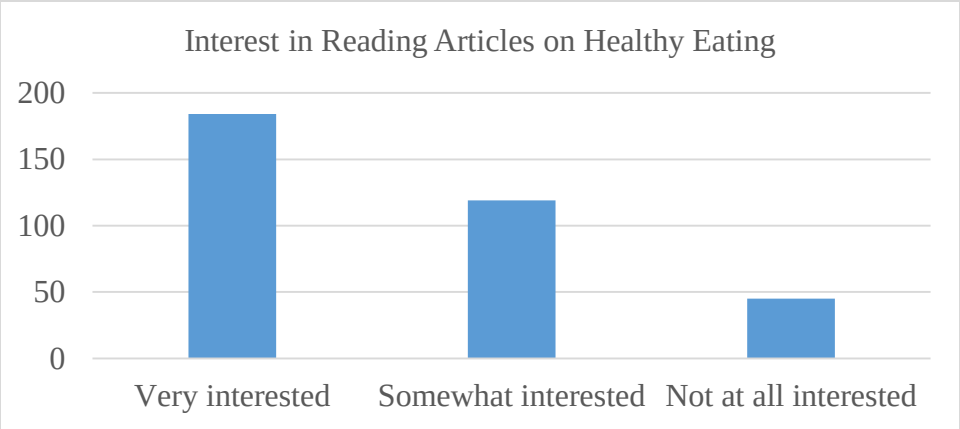
Figure 17. Ranking of Important Considerations for Dairy Product and Egg Purchases.



Interest in Reading Articles on Healthy Eating

Respondents were asked about their level of interest "in reading short articles that describe the benefits of eating fresh fruits and vegetables and protein items like meat, seafood, dairy products and eggs." Over half of respondents (53%) indicated that they would be "very interested" in reading such articles, while another 34% said they would be "somewhat interested" (Figure 18). Only 13% said that they would not at all be interested in these types of articles.

Figure 18. Interest in Reading Articles on Healthy Eating.



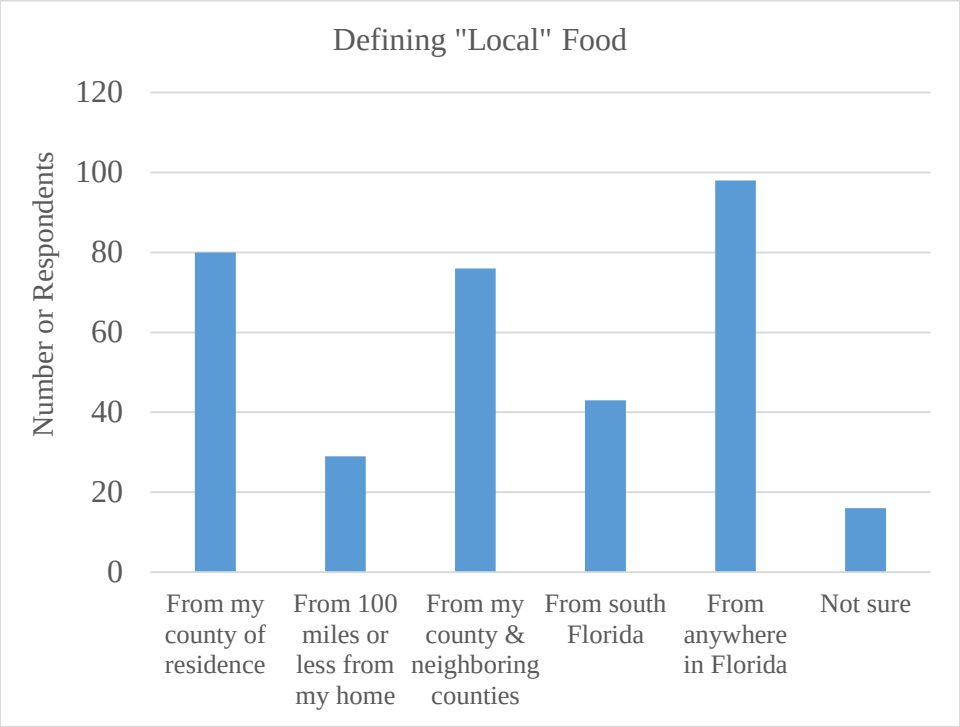
Defining "Local" Food

In an effort to identify consumers' opinions on what constitutes "local" food, respondents were given a series of descriptions of geographic areas and asked which of them most closely represents their definition of "local" food. The options offered were as follows:

- from my county of residence;
- from 100 miles or less from my home;
- from my county and neighboring counties;
- from south Florida;
- from anywhere in Florida; or
- other (describe).

The response that was most often identified was “from anywhere in Florida” (28%), followed by “county of residence” (23%), and “from my county and neighboring counties” (22%). The definition “from south Florida” was identified by 12% of respondents and the remaining options were selected by less than 10% of respondents (Figure 19). Five percent of the respondents indicated that they were not sure of how they define “local” food. Respondents offered a few “other” definitions including “from my community” and “from my local neighborhood.”

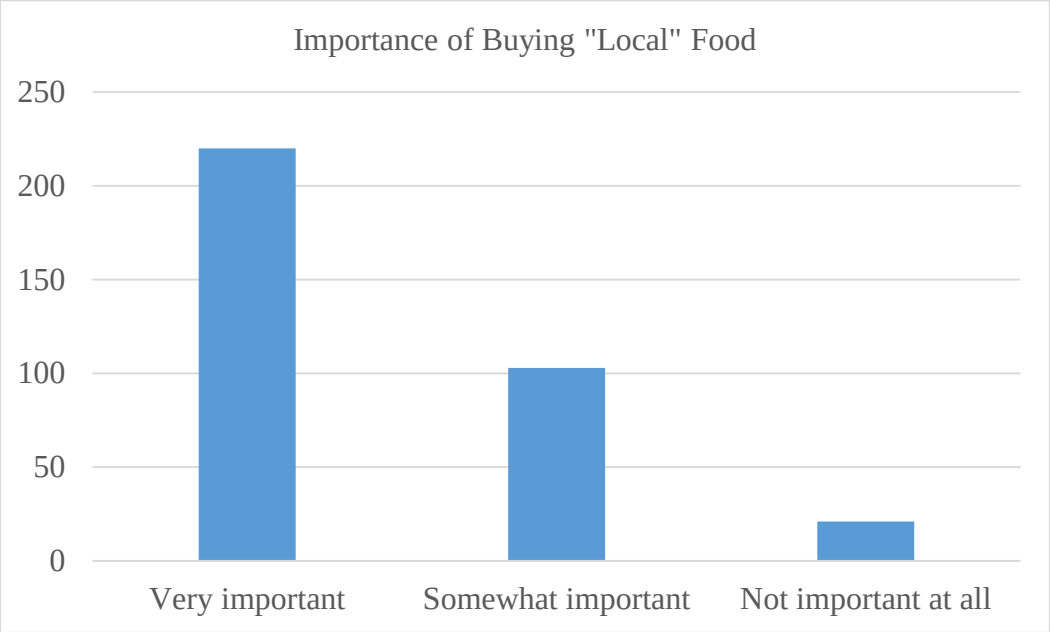
Figure 19. Defining “Local” Food.



Importance of Buying “Local” Food

Respondents were asked for their opinion on how important it is to purchase “local” food. Nearly two-thirds (63%) indicated that they thought it was “very important” to purchase “local” food, while another 29% felt that it was “somewhat important.” Only 6% of respondents said that they did not think it was at all important to purchase “local” food (Figure 20).

Figure 20. Importance of Buying “Local” Food.



For those respondents who answered “very important” or “somewhat important” (323) to this question, they were asked for the reasons for their opinion. They were offered a series of possible explanations as well as an option to provide their own reasoning. The explanations offered were as follows:

- Supports the local community;
- Supports local agriculture/farmers;
- Supports the local economy;
- Less environmental impact;
- More nutritious;
- Better quality;
- Sustainability; or
- Other (describe).

Respondents were allowed to identify as many of these explanations as they felt applied, and almost 600 responses were provided (Table 9). “Supports the local economy” and “supports local agriculture/farmers” were the most frequently identified reasons given for why it is important to purchase “local” food (43%), followed closely by “better quality” at 42%. “Support of the local community” was identified by 34% of respondents.

Table 9. Why Is It Important to Buy Local?

	NUMBER OF RESPONDENTS
Supports the local economy	139
Supports local agriculture/farmers	138
Better quality	136
Supports the local community	110
More nutritious	29
Sustainability	17
Less environmental impact	13

The "other" explanations provided by respondents provide some interesting insights. They included:

- Convenience (9 responses);
- Less expensive (6 responses);
- Freshness/faster delivery (including "don't want 'old' food") (5 responses);
- Reduced carbon emissions/lower transportation cost (2 responses);
- From a family farm (1 response);
- Accountability (1 response);
- No pesticides (1 response); and
- One day a natural disaster will wipe out everything (1 response).

Children's School Food Consumption

Only 36 (10%) of the 350 households that participated in the telephone survey indicated that they had school-aged children. Although the small sample size limits the ability to draw conclusions, there were two follow up questions asked of those households with children.

Approximately two-thirds of the 36 households (64 percent) said that their children ate fresh fruits and vegetables provided by the school meal program. A slightly larger amount (69% of the 36 households) indicated their children ate meat, seafood, dairy products and/or eggs through the school meal program. It is unknown if the ones that answered "no" meant their children don't eat these foods as part of the school meal program or don't participate in the school lunch program.

Demographics

The majority of respondents were female (74%). A total of 42 households surveyed indicated that they had children under 18 living in their home. Since in a previous question only 36 of the

households indicated that they had school-age children, it is assumed that six households had children younger than school age in the home.

Of the 350 household surveyed, only 240 provided data on their annual household before-tax income. The results are provided in Table 10.

Table 10. Distribution of Household Annual Income Before Taxes.

INCOME RANGE	NUMBER OF RESPONDENTS
Under $15,000	18
$15,000 to $24,999	31
$25,000 to $34,999	27
$35,000 to $49,999	17
$50,000 to $74,999	58
$75,000 to $99,999	30
More than $100,000	59

Telephone surveys provide a random sample of a population but not necessarily a representative sample because of selection bias. One of the ways that this can be most evident is when attempting to generate responses from a sample that reflects the income distribution of a population.

Recognizing this limitation in advance of conducting our consumer telephone surveys, we specified that a minimum of 14 percent of the phone surveys be from U.S. Federal census tracts #18.01 and 18.02; these two tracts make up approximately the western half of Martin County where income levels are somewhat lower than for the county as a whole. Despite this specification, the income distribution data from the telephone surveys in this study appear to reflect income levels somewhat higher than the income distribution for the county. However, it should be noted that over 30 percent of respondents to the survey did not answer the income question. Lower income respondents are generally more inclined not to answer income questions, so it would appear that the survey results likely capture a reasonably representative sample of the income distribution for Martin County. The relatively high proportion of missing responses on the income data, however, suggests that analyzing data by income level won't provide any accurate or useful insights.

Only 15 of the 350 households surveyed indicated that they have used SNAP (Supplemental Nutrition Assistance Program) or WIC (Special Supplemental Nutrition Program for Women, Infants and Children) benefit programs for the purchase of food. Similarly, only 16 responded

that their household had received food assistance from a food pantry, food bank or church within the past 12 months.

Weekly Household Expenditures on Groceries

In terms of weekly household grocery expenditures, the distribution of reported values varied over a wide range from $5.00 per week to $700.00 per week. The average for the sample was $128.95 in grocery expenditures per week. The standard deviation was 81.65, which reflects the wide range of responses. Table 11 shows a frequency distribution of the responses to this question.

Table 11. Responses to Weekly Grocery Expenditure Question.

Reported Value	Number of Responses	Reported Value	Number of Responses
$5.00	1	115.00	1
20.00	1	120.00	8
25.00	4	125.00	11
27.00	1	130.00	2
30.00	4	150.00	42
35.00	1	163.00	1
40.00	10	170.00	1
45.00	3	175.00	3
50.00	21	178.00	1
55.00	3	183.00	1
60.00	12	200.00	39
65.00	4	240.00	1
70.00	6	250.00	12
75.00	16	280.00	1
77.00	1	300.00	9
80.00	10	350.00	4
84.00	1	400.00	1
85.00	4	500.00	1
90.00	2	700.00	1
100.00	62	No response	43

On the low end of the reported expenditures, there were 11 reported values of $30.00 per week or less; one explanation for these low values could be that they might be for low income households using SNAP and/or WIC who simply reported their out-of-pocket cash costs for food beyond the food supplies they receive from SNAP and/or WIC. However, none of these 11

households reported using SNAP or WIC and only one of the 11 households reported having gotten food from a church, food pantry or food bank over the past 12 months. Another possible explanation could be that the respondents misinterpreted the question and thought it referred to fresh fruit and vegetable expenditures only, even though the question specifically asked about total weekly grocery purchases.

Farm or Other Agricultural-Based Business

Only 10 respondents indicated that they own a farm or agricultural-based business and 3 indicated they worked for such a business.

Online Surveys

At the request of the grantee, although not in the original scope of work, the consumer telephone survey and the agribusiness survey were made accessible online. However, since these responses do not represent a scientifically random sample, and there was no way to control whether or not the individual surveys were completely answered, the response data are simply presented in Appendix 4 and 5 respectively to this report.

4.) OTHER DISCUSSION AND CONCLUDING OBSERVATIONS

Local Food System Public Meetings

As part of this study, the University of Florida/IFAS Martin County Extension office, in cooperation with the Martin County Library System, hosted a series of public meetings in Indiantown and Stuart to gather input from consumers, agribusinesses, community development groups and any other interested parties on priorities for Martin County's local food system. These meetings were conducted using an interesting and productive framework: six general questions were posed to the attendees in an effort to stimulate discussion:

- What is the perceived value of local food products?
- What are the obstacles to purchasing of local food products?
- What are the obstacles to selling local food products?
- What improvements would consumers like to see in the local food system?
- What improvements would farmers and agribusinesses like to see in the local food system?
- What key food system infrastructure components are already in place?

Many of the responses were similar to those obtained in the interviews and consumer telephone surveys but there were some unique points made during these public meetings. First, on multiple

occasions in the various public meetings, the lack of local "Martin County" branding was mentioned. Thus there appeared to be considerable and perhaps stronger interest in local branding in the open citizen/community meetings than there was in the interviews conducted.

Second, the need for additional education and training was mentioned with considerable frequency in the public meetings, and suggestions were put forth on a very broad range of topics for both producers and consumers, including:

- Workforce training;
- A farm incubator program that included training on all aspects of opening and operating a small farm, including:
    - Accessing investment capital;
    - Purchasing land;
    - Complying with the appropriate regulations and regulatory agencies;
    - Setting up the farm;
    - Choosing which crops to grow;
    - Growing techniques;
    - Operating the farm; and
    - Sales and marketing of output.
- Education on the value of local food;
- Education on native edible plants and where to harvest them;
- Education on urban gardening;
- Education on seasonal constraints for local products (what local crops are available and at what times of the year);
- Education on differences in production systems for local versus non-local products;
- Improve education for everyone in the supply chain.
- Educate consumers about modern farming practices, BMPs (Best Management Practices), etc.;
- Education on concepts of:
    - Climatically appropriate food production;
    - Regenerative farming practices; and
    - Self-sufficiency for the community.

Other observations from the open meetings follow.

Perceived Value of Local Food Products

Consumers were asked to share characteristics which they attribute to local food. Interestingly, a number of the points made with regard to the perceived value of local food products were based on attributes which were unverifiable or, in some cases, incorrect. For example, participants mentioned that local food products are organic, safer (in terms of sanitary considerations), higher

quality, have higher nutritional value because they aren't losing nutrients during long-distance transportation, and are produced using more sustainable growing systems. Thus, the perceived values of local food reported by attendees reflect that consumers sometimes assign attributes to locally produced food products that may not be accurate.

Participant responses also included more accurate benefits such as knowing your farmer/provider, opportunities to educate the local community and children on where food comes from, possibility for development if agri-tourism business opportunities, and potentially enhanced appreciation for valuing agricultural lands as agricultural lands. By learning more about the perceived values that may drive consumer purchasing decisions, food system participants can identify areas where consumer education and/or focused marketing approaches may be of value.

Obstacles to Purchasing Local Food

- Lack of convenient sales locations.
- Lack of awareness of sales locations.
- Limited variety of items offered, so can't shop at one location for all needs.
- Limited (seasonal) availability.
- Not enough farmers selling local products.
- Limited days/hours of operation of markets for local sales (especially farmers markets).
- Farmers markets don't focus just on local foods.
- Higher costs.
- Farmers markets need to accept SNAP and WIC (also "double-access bucks" and/or "fresh-access bucks").
- Supplies seem to be decreasing as agricultural lands are being converted to other uses.
- Most local production is sold wholesale outside of the region.

Obstacles to Selling Local Food

- Lack of volume of local produce.
- Some consumers won't accept slightly blemished products even though surface blemishes don't affect product quality.
- Competing with big box stores and imported produce.
- Regulations:
    - USDA regulations for meat and poultry;
    - need special considerations/allowances for small-scale operations; and
    - high barriers to entry.
- High cost of labor and inputs, especially for small farmers.
- Lack of a trained workforce.

- Logistical constraints – lack of trucking and storage at markets.
- Required third-party audits.
- Problems with getting local products into chain stores.
- Need more sales outlets for local products.
- Booth fees and insurance at farmers markets.
- Selling/marketing adds another layer of complication to the already complex tasks of farming (often generates less than minimum wage returns for small farmers).
- Disconnected pieces of the food system – need to develop lasting relationships.
- Soil quality is poor in many areas of Martin County.
- Permitting and zoning for appropriate sales locations (e.g., where would a food hub be allowed?).

Improvements Consumers Would Like to See

- Local brand ("Martin Grown" or "Martin County Grown").
- Better accessibility to market locations/timing.
- Possible home delivery.
- CSA supplied by many growers.
- Local processing for meat, milk, cheese, etc.
- Creating "destination" clustering for local food retail.
- More local producers.
- More variety (e.g., tropical fruit).
- Better marketplace (e.g., protected from rain, cold, with storage, etc.).
- Partnerships with major food retail outlets to supply local food.
- Community gardens especially in food deserts.
- Create edible public landscapes.
- Online resources:
    - an example would be the online marketplace like Tallahassee's Red Hills Alliance (https://www.redhillsfarmalliance.com/);
    - a system to share surplus products;
    - a way for consumers to let farmers know what they want; and
    - a website for producers to use to tell their story to consumers.
- Cooperative market.

Improvements Farmers and Agribusinesses Would Like to See

- "Martin County" brand.
- Facilities available for value-added production.

- More items from large growers sold locally – ask them, "Why don't you sell more locally?"
- Affordable agricultural-zoned land.
- Startup assistance for new growers:
    - land access;
    - financial planning assistance;
    - more technical assistance (e.g., site visits, extension);
    - small farm incubator program;
    - supplies (more sources, and ability for small growers to come together to buy in bulk and have a place to store it); and
    - marketing assistance.
- Develop a program to help growers coordinate crops to consistently offer a wide variety of products in season.
- Changes in zoning and the comprehensive plan to allow for clustered agriculture which would allow farmers to share resources/infrastructure.
- Clarification on what is allowable on land with different zoning.
- Create special zoning mechanism to allow for a food hub.
- Improvements in "sustainable living" programs for senior citizens.
- Improvements in "sustainable living" programs for low-income communities.
- Working with local developers to create edible landscapes.
- Remember that farmers need to make money!

Existing Food System Infrastructure

Participants in the open citizen meetings provided a variety of observations regarding a wide range of key elements of the food system infrastructure that already exist in Martin County and the surrounding region.

- Stuart Green Market;
- Treasure Coast Food Bank;
- Treasure Coast Research Park – Sunshine Kitchen and biofuels programs;
- Localecopia;
- IFAS Martin County Extension;
- Seminole Inn farmers market (may no longer be open);
- Knowledgeable, engaged and committed local growers – several specifically named;
- Local farmers who are interested in teaching and sharing their expertise;
- Local farm-to-table initiatives;
- Local restaurants wanting to buy and serve local food products;
- Local teachers;

- Community gardens;
- Local planners (City, County, Municipal Planning Organization, etc.);
- New agribusiness industrial park opening soon;
- House of Hope;
- Indian River State College, Small Business Development Center;
- Florida Food Connect;
- "EatsDelivered" – will soon begin fresh vegetable delivery service;
- ATTRA – National Sustainable Agriculture Assistance Program - developed and managed by the National Center for Appropriate Technology (NCAT);
- Florida Farm Bureau and its Young Farmers and Ranchers program;
- Consumer demand for local food:
    - Millennials who value local food;
    - Those committed to healthy eating and see local food as an important component;
    - Higher income consumers who can afford higher costs;
- Vendor/suppliers for farmers (fertilizers, ag. chemicals, irrigation, etc.);
- Boys and Girls Club of Indiantown; and
- Seagull Industries assisted living facility.

Food Deserts

USDA defines "food deserts" most briefly, as "neighborhoods that lack healthy food sources" (https://www.ers.usda.gov/data-products/food-access-research-atlas/documentation/ page 1). Residents of such areas typically have a more difficult time eating a healthy diet. The American Nutrition Association points out that the problem with food deserts is further complicated by the fact that "while food deserts are often short on whole food providers, especially fresh fruits and vegetables, instead, they are heavy on local quickie marts that provide a wealth of processed, sugar and fat-laden foods that are known to contribute to our nation's obesity epidemic" (http://americannutritionassociaton.org/newsletter/usda-defines-food-deserts page 1).

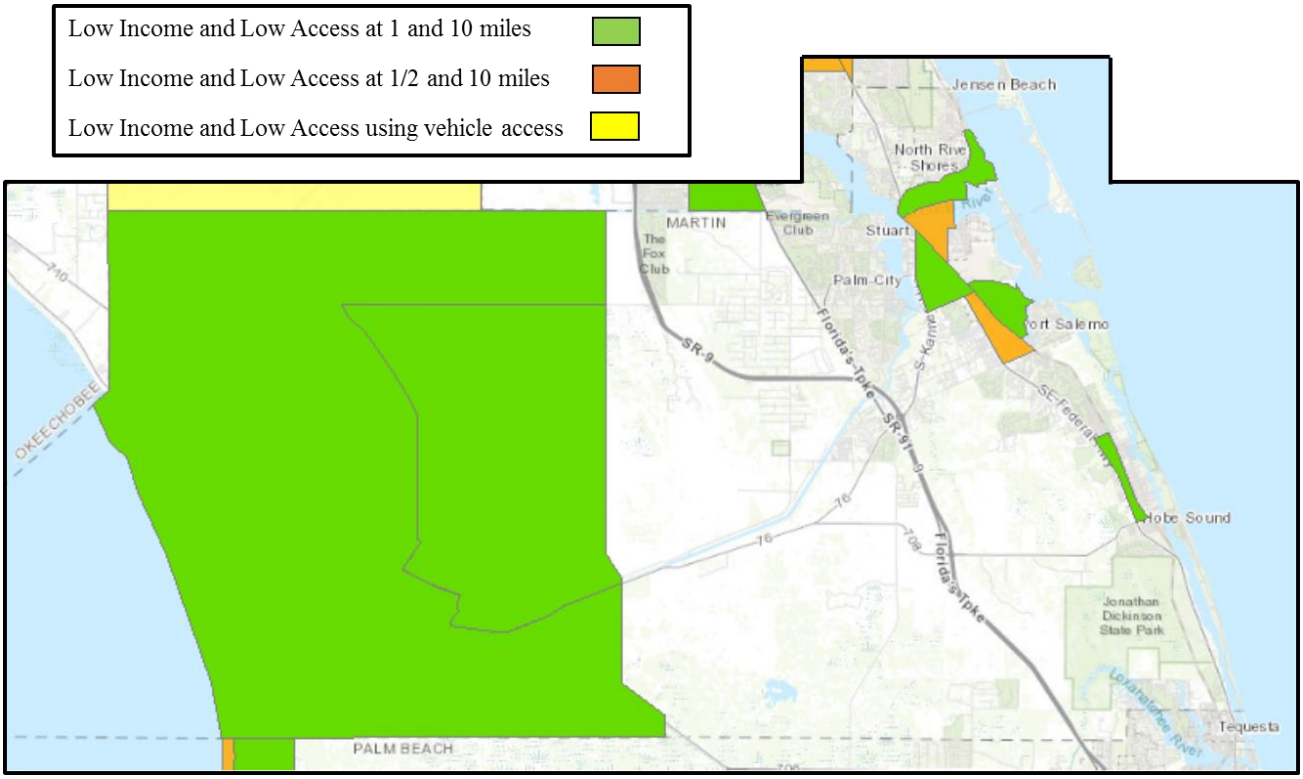
There are numerous ways to measure access to food stores, most all of which take into consideration one or more factors like distance to a store, income constraints, vehicle availability and/or the availability of public transportation.

Using factors like income constraints, distance to a store, and vehicle availability by census tract, USDA generates maps of food deserts for the entire nation. The USDA methodology identifies a census tract as being "low income" if at least 20 percent of families have income below federal poverty levels for family size, or where family income for the census tract is at or below 80 percent of the surrounding area's median family income. The USDA methodology identifies a census tract as having "low access" to healthy food based on distance from a major supermarket, large grocery store or supercenter (hereinafter, described simply as a "supermarket") using two

classifications; the first classification specifies that a census tract is considered to be "low access" if 500 people or one-third of the tract's population lives more than a mile from a supermarket in urban areas, or more than 10 miles from a supermarket in rural areas. The second classification is a stricter definition, stating that a census tract is considered to be "low access" if 500 people or one-third of the tract's population lives more than one half mile from a supermarket in urban areas, or more than 10 miles from a supermarket in rural areas. Figure 21 contains the USDA map of the location of Food Deserts in Martin County.

Green areas on the map are census tracts that are identified as being "low income" and having "low access" to a supermarket using the first, less restrictive definition of 500 people or one-third of the tract's population living more than a mile from a supermarket in urban areas, or more than 10 miles from a supermarket in rural areas. When using the more restrictive definition of 500 people or one-third of the tract's population living more than one half mile from a supermarket in urban areas, or more than 10 miles from a supermarket in rural areas, additional census tracts are identified and they show up in orange on the map. USDA does not identify any census tracts in Martin County as being low access in terms of vehicle access.

Figure 21. Martin County Food Deserts, Low Income and Low Access Areas 2015.



Source: USDA Food Access Research Atlas. https://www.ers.usda.gov/data/fooddesert.

A few additional observations are in order. First, the identification of the western half of Martin County as a food desert is somewhat misleading since this area is relatively sparsely populated, and also since about 40 percent of this portion of the County is owned by the South Florida Water Management District. Second, with respect to the areas shown in green and orange in and around Stuart, Palm City and Port Salerno, the USDA definitions do not take into consideration access to public transportation; the Martin County Transit Service bus maps (see https://www.martin.fl.us/martin-county-services/bus-schedule-information) indicate fairly extensive bus service in these areas. Moreover, a review of the location of supermarkets in these areas during the period when this study was conducted suggest that several new supermarkets are now open that may not have been open when the USDA data was analyzed in 2015 which could decrease the size of these food desert areas. Together these factors may contribute to Martin County having a Food Insecurity Rate of 12.9 percent of its population, which is lower than both the Florida average (15.1 percent) and the national average (13.4 percent) as reported by http://www.FeedingAmerica.org.

Concluding Observations

Martin County is uniquely well positioned to further develop and expand its local food capacities within the context of its overall food system. This solid positioning begins with a core of experienced farmers and individuals committed to further strengthening small farms and local food production capabilities. Furthermore, being geographically located between the Treasure Coast Food Bank and the Sunshine Kitchen in the Treasure Coast Research Park in St. Lucie County to the north, and Localecopia in Palm Beach County to the south provides Martin County growers and other participants and stakeholders in the local food supply chain with potential opportunities to draw upon the demonstrated strengths of these operations, to learn from their experience, and to perhaps partner more closely with them for food aggregation, processing and distribution.

This study has identified a number of challenges and constraints to strengthening of the local Food Supply Chain in Martin County. These challenges, however, are not unlike those faced by many cities and communities throughout the country as they attempt to expand and improve their local food supply system and, at the same time, address the nutritional problems associated with food deserts. Thus a thorough assessment of the literature describing approaches used to address these issues elsewhere in the country could be beneficial. Just one example would be the mobile farmers markets or mobile produce markets – trucks stocked with fresh fruits and vegetables – which bring fresh produce to sell in underserved (generally urban) areas and neighborhoods at specific locations on a regular weekly schedule. While these trucks allow consumers in food deserts to access fresh produce and improve their diets, at the same time they can be efficient outlets for moving smaller volumes of locally-produced food products than what large chain stores typically seek. These programs not only benefit families with children but they often also

schedule regular visits to senior living centers and facilities to allow their residents improved access to fresh produce. In some cases these mobile produce trucks even offer to double the value of SNAP dollars through grants offered by USDA.

During the interviews and surveys, many suggestions were made to help strengthen the local food movement and address food deserts in Martin County, all of which have been discussed previously in this report. Most all of the suggestions require up-front investment which can be difficult to obtain. The suggestions that would require the most investment is the idea of creating a food hub in Martin County. However, as discussed in the first paragraph of this section, it would likely be more efficient to partner with the existing, established facilities in Ft. Pierce and West Palm Beach that serve some of the roles of food hub. These operations also could coordinate with the new facility being built in Martin County with its own elements of a food hub to offer complementary services to local growers.

One area that was mentioned on multiple occasions was the need for more education. As described in the report, suggested educational topics varied across all levels of the food chain including farmworker training, technical grower training, courses on farm business management, sustainable production systems, urban gardening, and programs to teach consumers the value of local food. UF/IFAS offers training programs on a wide range of topics that include the Master Gardener program, a Beginning Farmer Business curriculum, The Farm Financial Planning education series to certify growers to access USDA Farm Service Agency (FSA) loans, training on Florida Food Regulations, and other programs offered through the UF/IFAS Small Farms Academy and Small Farms and Alternative Enterprises programs. An increasing number of these training programs are being offered online allowing anyone, anywhere in the State, to access them. These programs could be offered as part of a farm incubator program in Martin County.

Another topic that seemed to have fairly broad appeal was the idea of a Martin County brand or logo for locally produced food. However, as noted in the report, very few of the growers seem to be using the Fresh from Florida logo and branding so it appears as though there is an inconsistency worth mentioning regarding this idea.

Some agribusinesses felt that regulations affecting land use, zoning and permitting were unclear. Also, some participants indicated that local government officials don't always seem to have an appreciation for the contributions that agriculture makes to the local economy, and the constraints that are placed on land owners and farmers for using their land for agricultural purposes.

Consumers surveyed indicated that they have a sincere appreciation for the value of local food – over 60 percent of respondents indicated that they think "buying local" is very important and another 30 percent said they thought it was somewhat important. Only six percent of respondents

indicated that they did not think it was important. This bodes well for the demand side of the equation for local food production.

Observations by those who contributed to the interviews, surveys and public meetings suggested that there could be opportunities to increase participation in local farmers markets by both sellers and buyers through increased promotion of the markets, expanding days and/or hours of operation, expanding facilities (e.g., covered areas, refrigerated storage, etc.), perhaps lowering booth fees and insurance costs for farmers, and acceptance of SNAP, WIC, Special Access Bucks/Double Access Bucks, etc. at the farmers markets.

Access to large, commercial buyers represents a difficult challenge faced by small, local farmers throughout the country. However the school system in Martin County could represent a fairly large potential market for local growers. School system food programs work on extremely limited budgets so they are not able to afford to pay high prices for their food supplies, thus they may not be a particularly attractive principal market. Nevertheless, this could be a market of last resort for farmers who might periodically have a surplus of a product if the alternative would be to dump their surplus.

On the topic of surplus food supplies, some interviewees mentioned that they would like to donate surplus food to local food banks and homeless shelters but are not able to do so because of regulations that restrict the ability of these organizations to accept donated food products. However, other interviewees reported that they do not have this problem. Some of the food banks acknowledged that there are instances where they aren't able to accept especially small donations but in those instances they refer the farmers to other organizations that can accept the donations. It appears as though there may be potential for some expanded coordination within the county to help match food donors with food banks and shelters, thus increasing food availability for those in need, and reducing the amount of good food that is wasted.

APPENDIX 1

Martin County Food System Feasibility Study
2017 Interview Survey Guide for Farms and Agribusinesses

Interview code _____

Q1. Are you the:

Farm/Ranch Owner _____

Farm/Ranch Manager _____

Other (describe) _____

Q2. Is this farm/ranch:

Family run _____

Corporate _____

Other _____

Q3. How many acres did you farm last year? _____

Q4. How many workers did you employ last year, at the peak? _____

Q5. Were your annual gross sales last year:

Less than $50,000 _____

$50,000 to $200,000 _____

$200,000 to $500,000 _____

Over $500,000 _____

Q6. What percentage of your sales would you estimate are wholesale versus retail?

Wholesale _____%

Retail _____%

Q7. Where do you currently sell your products? [Get them to identify all that apply first, then go back and ask about approximate percentages.]

To local wholesalers _____%

To large food distributors _____%

Direct to retail chain stores _____%

Direct to smaller, local grocery stores or markets _____%

In local farmers markets _____% Is there a particular market or markets where you sell?

_____

_____

Roadside stand _____%

U-Pick _____%

Community Supported Agriculture (CSA) _____%

Restaurants _____% Local? Y N both local and non-local

School system _____%

Hospitals _____%

Prisons _____%

Other _____ _____%

Other _____ _____%

Q8. Do you ever provide or sell your products to food banks?

Yes _____ Regularly or just surplus production? _____

No _____

Q9. Do you presently sell or market your products as "local"?

Yes _____ All ____? Some _____? What % marketed as local _____?

No _____

Q10. Why / why not?

Q11. Do you sell outside of the local area?

Yes _____ To whom / Where? _____

No _____

Q12. What are the 10 most important products that you produce:

Commodity/product	**Acres**
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Q13. Which of the following post-harvest practices, if any, do you presently use?

Produce placed in a cooler after harvest _____

Forced air or blast cooling _____

Hydro cooling _____

Other (e.g., washing, waxing, cleaning, fileting, grading, etc.)

_____

_____

[Provide a definition of a food hub . . .]

Q14. Do you have a need for another selling avenue that a food hub could provide?

Have you ever thought about the potential benefits of using or working with a food hub if one was to be available in or close to Martin County?

Might there be services that a food hub could provide that would be beneficial to you, such as helping to comply with state and federal food processing regulations, etc.?

Q15. Would you be interested in a local facility that would allow you to refrigerate, further process, and/or package your products?

Very interested _____

Somewhat interested _____

Not interested _____

Not sure _____

Q16. [If "very" or "somewhat"] how far would you be willing to travel to bring your products to such a facility, or how long would you be willing to drive?

Q17. [If "very" or "somewhat"] . . . what products might you bring to such a facility?

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Q18. [If "Not interested"] Why not?

Q19. Might you be interested in selling your products to a local wholesale distributor who is targeting its sales efforts to provide improved food access to underserved communities?

Very interested _____

Somewhat interested _____

Not at all likely _____

Not sure _____

Q20. [If "very" or "somewhat"] what products might you be interested in selling to this wholesale distributor?

Q21. [If "Not likely"] why not?

Q22. Do you think either the processing facility or the wholesale distribution system I've just mentioned would allow you to expand your farm operation and/or hire additional labor/more workers?

Yes ____ How much expansion ____% >> how many new workers ____ = ____%

No _____

Q23. [If "NO"] why not?

Q24. Do your production seasons for your commodities concur with the list that is published by the Florida Department of Agriculture and Consumer Services (FDACS) [Give them the list to review. Copy at end of this Appendix.]

Q25. Would you be interested in participating in a new farm incubator program?

Very interested _____

Somewhat interested _____

Not at all likely _____

Not sure _____

Q26. [If "Not likely"] why not?

Florida Crops Seasonal Availability

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Avocado	✓					✓	✓	✓	✓	✓	✓	✓
Bell Pepper	✓	✓	✓	✓	✓						✓	✓
Blueberry				✓	✓							
Broccoli	✓	✓	✓									
Cabbage	✓	✓	✓	✓	✓							✓
Cantaloupe				✓	✓	✓						
Carambola	✓	✓	✓	✓			✓	✓	✓	✓	✓	✓
Carrot				✓	✓							
Cauliflower	✓	✓	✓	✓								✓
Celery	✓	✓	✓	✓	✓							✓
Cucumber			✓	✓	✓					✓	✓	✓
Eggplant	✓	✓	✓	✓	✓	✓					✓	✓
Grapefruit	✓	✓	✓	✓	✓				✓	✓	✓	✓
Guava	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Lettuce	✓	✓	✓	✓								✓
Longan							✓	✓				
Lychee						✓	✓					
Mango					✓	✓	✓	✓				
Mushroom	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Orange	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓
Papaya		✓	✓	✓	✓	✓						
Passion Fruit	✓					✓	✓	✓			✓	✓
Peaches				✓	✓							
Peanut	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Potato		✓	✓	✓	✓	✓						
Radish	✓	✓	✓	✓	✓						✓	✓
Snap Beans	✓	✓	✓	✓	✓						✓	✓
Spinach			✓	✓								
Squash	✓	✓	✓	✓	✓					✓	✓	✓
Strawberry	✓	✓	✓	✓								✓
Sweet Corn	✓	✓	✓	✓	✓	✓				✓	✓	✓
Tangerine	✓	✓	✓	✓	✓				✓	✓	✓	✓
Tomato	✓	✓	✓	✓	✓	✓				✓	✓	✓
Watermelon				✓	✓	✓	✓					

Source: https://www.freshfromflorida.com/content/download/16790/269889/P-01332.pdf

APPENDIX 2

MARTIN COUNTY
FOOD SYSTEM FEASIBILITY STUDY
Demand side survey
(for interviews with school system officials, restaurants, etc.)

QUESTIONS:

1. Is there much demand for locally-produced foods at your organization?

2. Do you have a procedure for locating locally-produced foods in this area?

3. What are your procedures for soliciting bids on your fresh, processed and canned fruits, vegetables and potatoes, and meat/protein products?

4. Do you tend to purchase from large, institutional vendors like Sysco, U.S. Foodservice or Cheney Brothers, or smaller businesses?

5. Do you tend to purchase from a single supplier year-round or do you vary your sources during the year?

   Why?

6. Do you use annual contracts for your food purchases? Y N

   a. If not, what length do you use? _____

   Why?

7. How do you define "local" food?

8. Do you currently place any emphasis or priority on purchasing locally produced food? Y N

   Why or why not?

   a. [IF YES] How from where do you generally source them?
      - Large institutional vendors
      - Smaller local vendors
      - Individual farmers/ranchers
      - Farmer or rancher cooperatives

   b. Has your emphasis on purchasing locally changed in recent years? Y N

   Why or why not?

   c. Do you foresee your opinion on purchasing locally changing in the near future? Y N

   Why or why not?

9. Are you able and willing to pay a premium for locally produced food products?

   a. IF SO, how much MAXIMUM? _____%

10. Would a brand and logo for locally-produced food products be something that you think that would be beneficial for you?

11. Do you presently experience any deficiencies or difficulties in obtaining supplies of fruit, vegetables, potatoes or meat products? Y N

    Which ones?

12. Could you please rank the following according to relative importance in food sourcing and purchasing decisions:

    _____ cost,
    _____ quality,
    _____ year-round availability,
    _____ ease of purchasing,
    _____ variety,
    _____ sustainability,
    _____ locally grown,
    _____ organic,
    _____ other _____

13. Which ten fruit, vegetable, potato and meat/protein products do you think you currently purchase in the largest volumes? Can you provide an estimate of the volumes currently being purchased?

    _____ _____

    _____ _____

    _____ _____

    _____ _____

    _____ _____

    _____ _____

14. Might you be interested in a new supplier of fruit, vegetable, potato and/or meat/protein products? Y N

    Why or why not?

15. Are there any projected future purchasing trends that you foresee for food products, including changes to products offered?

16. Is there any data on your fruit, vegetable, potato and/or meat/protein product purchases that is available as a matter of public record that we could access for our study?

17. Are there any other related issues that you would like to discuss that we haven't raised?

APPENDIX 3

MARTIN COUNTY
FOOD SYSTEM FEASIBILITY STUDY

Consumer Telephone Survey

For all of the following questions about food, please consider everyone who lives in your household.

START
First, I'd like to ask you a few questions about fruits and vegetables.
1. Do you eat fruit?
Yes=1
No=2
Don't know=8
Refused to answer=9

if Q1=1
1A. When you buy fruit, do you most often buy:
Fresh fruit=1
Canned/jarred fruit=2
Frozen fruit=3
Other (describe)=4
Not sure=8
Refuse=9

Q1A=4
1B. Describe other
[text]

2. Do you eat vegetables?
Y=1
No=2
Don't know=8
Refuse=9

if Q2=1
2A. When you buy vegetables, do you most often buy:
[single
Fresh vegetables=1
Canned vegetables=2
Frozen vegetables=3

Other (describe)=4
Not sure=8
Refuse=9

if Q2A=4
2B. Describe other
[text]

if Q1=2 and Q2=2
3. Why don't you ever eat fruits and/or vegetables? [Mark all that apply; Do **NOT** read list.]
[checkbox]
Do not like fruit=Q3x0
Do not like vegetables= Q3x1
Fruits are too expensive=Q3x2
Vegetables are too expensive=Q3x3
The kinds of fruits and/or vegetables I want aren't available locally=Q3x4
Too hard to get to the store=Q3x5
Dietary restrictions=Q3x6
Other (describe)=Q3x7
Not sure=Q3x9
No response="."

if Q3x7=1 Describe.
[text]

if Q3x0=1 or Q3x1=1 or Q3x2=1 or Q3x3=1 or Q3x4=1 or Q3x5=1 or Q3x6=1 or Q3x7=1 or Q3x8=1 or Q3x9=1 >> Go To Q20

Continue

In all of the following questions, please consider only fresh fruits and vegetables – those that are not canned, frozen, or otherwise preserved.

4. How often do you eat fresh fruit? Would you say you eat fresh fruit:
Every day=5
Most days=4
A few days a week=3
Once a week or less=2
Never=1
Not sure=8
Refuse=9

5. And, how often do you eat fresh vegetables? Would you say you eat fresh vegetables:
Every day=5
Most days=4
A few days a week=3
Once a week or less=2
Never=1
Not sure=8
Refuse=9

6. I'll read you a list of fresh fruits and vegetables. Please tell me yes or no for each of these fresh fruits and vegetables you eat on a regular basis, or when they're in season.
[checkbox]
Tomatoes=0
Corn=1
Cucumbers=2
Green beans=3
Bell peppers=4
Cabbage=5
Lettuce=6
Tropical fruits (like pineapple, mango, etc.)=7
Greens=8
Citrus fruits (like oranges, grapefruit, etc.)=9
Potatoes=10
Carrots=11
Celery=12
Onions=13

7. Do you consume as many fresh fruits and vegetables as you would like?
Yes=1
No=2
Don't know=8
Refused to answer=9

8. Where do you do most of your food shopping? Would you say you do most of your food shopping at:
A large grocery store (like Publix or Winn-Dixie)=1
A small neighborhood grocery store=2
A big box store (like Walmart or Target)=3
A discount store (like Dollar General or Family Dollar)=4
A wholesale club (like Costco, Sam's, or BJ's)=5
Other (describe)=6
Not sure=8
Refuse=9

if Q8=6
8A. Describe other
[text]

9. How do you typically get to and from the place where you do most of your grocery shopping? Most often, do you:
Use your own car=1
A friend or family member's car=2
Bus=3
Taxi=4
Walk=5
Other (describe)=6
Not sure=8
Refuse=9

if Q9=6
9A. Describe other
[text]

10. How much does your household usually spend on groceries each week?
[dollar figure]
Refuse= "."

11. Where do you purchase fresh fruits and vegetables? [Do **NOT** read. Mark ALL that apply.]
[checkbox1,1-10
Large grocery store (like Publix or Winn-Dixie)=Q11x1
Small neighborhood grocery store=Q11x2
Big Box store (like Walmart or Target)=Q11x3
Discount store (like Dollar General or Family Dollar)=Q11x4
Wholesale club (like Costco, Sam's, or BJ's)=Q11x5
Produce store=Q11x6
Vegetable stand or Farmer's market=Q11x7
Convenience store=Q11x8
U-Pick farm=Q11x9
Other (describe)=Q11x10
Not sure=Q11x11
Refuse="."

if Q11x9=1
11A. Describe other
[text]

12. How far do you live from the place where you most often purchase fresh fruits and vegetables?
Less than 1 mile=1
1 to 2 miles=2
More than 2 miles=3
Not sure=8
Refuse=9

13. If this location were not an option for buying fresh fruits and vegetables, how far would you be willing to travel to purchase fresh fruits and vegetables? [Allow respondent to answer, and clarify as needed; prompt if needed.]
Less than 1 mile=1
1 up to 2 miles=2
2 up to 5 miles=3
5 up to 10 miles=4
More than 10 miles=5
"As far as I had to"=6
"I wouldn't"=7
Not sure=8
Refuse=9

14. I'll read you a list of things that sometimes limit people's purchase of fresh fruits and vegetables. Please tell me yes for any of these are issues that ever limit your purchase of fresh fruits and vegetables.
[checkbox]
Fresh produce is too expensive=Q14x0
The kinds of fresh produce I want are not available locally=Q14x1
Fresh produce is not available where I usually shop=Q14x2
It takes too long to shop for fresh produce=Q14x3
It is too hard to get to a store that sells fresh produce=Q14x4
I'm on a special diet=Q14x5
Other (describe)=Q14x6
Not sure=Q14x7
Refuse=Q14x8

if Q14x6=1
14A. Describe other
[text]

Would your household eat more fresh fruit and vegetables if:
15A. …there were closer or more convenient places to buy them?
Yes=1
No=2

Don’t know=8
Refuse=9

15B. …they were less expensive?
Yes=1
No=2
Don’t know=8
Refuse=9

15C. …the quality was better?
Yes=1
No=2
Don’t know=8
Refuse=9

16. Do you grow any fruits or vegetables at home for your own consumption? [Prompt if needed – “like a garden or fruit trees in your yard.”]
Yes=1
No=2
Don’t know=8
Refuse=9

17. I’ll read you a list of three things people consider when buying fresh fruit and vegetables. First, please tell me which of these is most important to you:
Freshness=1
Price=2
Convenient purchasing location=3
Not sure=8
Refused=9

18. And which of these is next most important …
Freshness=1
Price=2
Convenient purchasing location=3
Not sure=8
Refused=9

19. [Mark remaining item as third]:
[single
Freshness=1
Price=2
Convenient purchasing location=3

Not sure=8
Refused=9

Continue

Next, I have some similar questions about meat, seafood, dairy, and eggs.

20. Do you eat any of the following: meat, seafood, dairy products, or eggs?
Yes=1
No=2
Don't know=8
Refuse=9

if Q20=2

21. Why don't you ever eat meat, seafood, dairy products, or eggs? [Mark all that apply; Do **NOT** read list.]
[checkbox]
Do not like meatQ21x0
Do not like seafood=Q21x1
Do not like dairy or eggs=Q21x2
Too expensive=Q21x3
The kinds of meat, seafood, or dairy products I want aren't available locally=Q21x4
Too hard to get to the store=Q21x5
Dietary restrictions=Q21x6
Allergies=Q21x7
Other (describe)=Q21x8
Not sure=Q21x9
Refuse=Q21x10

if Q21x8=1
21A. Describe other
[text]

if Q21x0=1 or Q21x1=1 or Q21x2=1 or Q21x3=1 or Q21x4=1 or Q21x5=1 or Q21x6=1 or Q21x7=1 or Q21x8=1 >> Go To Q37

Continue

22. How often do you eat meat, seafood, dairy products or eggs? Would you say you eat one any of these things:
Every day=5
Most days=4

A few days a week=3
Once a week or less=2
Never=1
Not sure=8
Refuse=9

23. I'll read you a list of meat, seafood, and dairy products. Please tell me which of these you eat on a regular basis, or when they're in season.
[checkbox]
Seafood or fish=Q23x0
Chicken=Q23x1
Beef=Q23x2
Pork=Q23x3
Eggs=Q23x4
Dairy products (like milk, yogurt, or cheese)=Q23x5

24. Do you consume as many meat, seafood, dairy and egg products as you would like?
Yes=1
No=2
Don't know=8
Refuse=9

25. Where do you purchase meat, seafood, dairy and egg products? [Mark ALL that apply.]
[checkbox]
Large grocery store (like Publix or Winn-Dixie)=Q25x0
Small neighborhood grocery store=Q25x1
Big Box store (like Walmart or Target)=Q25x2
Discount store (like Dollar General or Family Dollar)=Q25x3
Wholesale club (like Costco, Sam's, or BJ's)=Q25x4
Seafood store=Q25x5
Butcher store=Q25x6
Farm stand=Q25x7
Convenience store=Q25x8
Other (describe)=Q25x9
Not sure=Q25x10
Refuse=Q25x11

if Q25x9=1
25A. Describe other
[text]

26. How far do you live from the place where you most often purchase meat, seafood, dairy and egg products?
Less than 1 mile=1
1 to 2 miles=2
More than 2 miles=3
Not sure=8
Refuse=9

27. If this location were not an option for buying meat, seafood, dairy and egg products, how far would you be willing to travel to purchase these products? [Allow respondent to answer, and clarify as needed; prompt if needed.]
Less than 1 mile=1
1 up to 2 miles=2
2 up to 5 miles=3
5 up to 10 miles=4
More than 10 miles=5
"As far as I had to"=6
"I wouldn't"=7
Not sure=8
Refuse=9

28. I'll read you a list of things that sometimes limit people's purchase of meat, seafood, dairy and eggs. Please tell me if any of these are ever issues that limit your purchase of these products. [checkbox]
These products are too expensive=Q28x0
The kinds of products I want are not available locally=Q28x1
The products I want are not available where I usually shop=Q28x2
It is too hard to get to a store that sells these products=Q28x3
I'm on a special diet=Q28x4
Other (describe)=Q28x5
Not sure=Q28x6
Refuse=Q28x7

if Q28x5=1
28A. Describe other
[text]

Would your household eat more meat, seafood, dairy or egg products if:
29D. …there were closer or more convenient places to buy them?
Yes=1
No=2
Don't know=8
Refuse=9

29E. …they were less expensive?
Yes=1
No=2
Don't know=8
Refuse=9

29F. …the quality was better?
Yes=1
No=2
Don't know=8
Refuse=9

30. Do you raise any animals at home for your own consumption? [Prompt if needed – "like chickens for eggs."]
Yes=1
No=2
Don't know=8
Refuse=9

31. I'll read you a list of three things people consider when buying meat and seafood. First, please tell me which of these is most important to you:
Freshness=1
Price=2
Convenient purchasing location=3
Not sure=8
Refused=9

32. And which of these is next most important …
Freshness=1
Price=2
Convenient purchasing location=3
Not sure=8
Refused=9

33. [Mark remaining item as third]:
Freshness=1
Price=2
Convenient purchasing location=3
Not sure=8
Refused=9

34. How about dairy and eggs – which of these is most important to you in buying dairy products and eggs:
Freshness=1
Price=2
Convenient purchasing location=3
Not sure=8
Refused=9

35. And which of these is next most important …
Freshness=1
Price=2
Convenient purchasing location=3
Not sure=8
Refused=9

36. [Mark remaining item as third]:
Freshness=1
Price=2
Convenient purchasing location=3
Not sure=8
Refused=9

Continue

Now, I have a few general questions about food.

37. How interested would you be in reading short articles that describe the benefits of eating fresh fruits and vegetables and protein items like meat, seafood, diary, and eggs? Would you be very interested, somewhat interested, or not at all interested?
Very interested=3
Somewhat interested=2
Not at all interested=1
Don't Know=8
Refused=9

38. "Local food" can be defined several ways. Which of the following best represents your definition of "local food"?
From my county of residence=1
100 miles or less from my home=2
From my county and neighboring counties=3
From South Florida=4
From anywhere in Florida=5
Other (describe)=6

Not sure=8
Refuse=9

if Q38=6
38A. Describe other
[text]

39. How important do you think it is to buy "local food"? Would you say it's very important, somewhat important, or not important at all?
Very important=3
Somewhat important=2
Not important at all=1
Don't Know=8
Refused=9

if Q39=3 or Q39=2
39A. Why is that? [Do **NOT** read; Mark ALL that apply.]
[checkbox]
Supports local community=Q39Ax0
Supports local agriculture/farmers=Q39Ax1
Supports local economy=Q39Ax2
Less environmental impact=Q39Ax3
More nutritious=Q39Ax4
Better quality=Q39Ax5
Sustainability=Q39Ax6
Other (describe)=Q39Ax7
Not sure=Q39Ax8
Refuse=Q39Ax9

if Q39Ax7=1
39A1. Describe other
[text]

40. Do any school-age children live in your household?
Yes=1
No=2
Don't know=8
Refuse=9

IF Q40=1

40A. Do any of your children eat fresh fruits and vegetables through a school meal program?

Yes=1
No=2
Don’t know=8
Refuse=9

40B. Do any of your children eat meat, seafood, dairy products, or eggs through a school meal program?
Yes=1
No=2
Don’t know=8
Refuse=9

41. Does anyone in your household ever purchase food with SNAP or WIC benefits?
Yes=1
No=2
Don’t know=8
Refuse=9

42. In the past 12 months, did your household ever get food assistance from a church, a food pantry, or a food bank?
Yes=1
No=2
Don’t know=8
Refuse=9

Continue

Finally, we just have a few demographic questions to be sure we’ve talked to all kinds of people in Martin County.

43. Gender [Don’t ask, just record]
Male=1
Female=2

44. Including yourself, how many adults age 18 or older are in your household?
[number]

45. And, how many children under age 18 are in your household?
[number]

46. Just for statistical purposes, can you tell me if your household's total yearly income before taxes is less than $50,000 or $50,000 or more?
Less than $50,000=1
$50,000 or more=2
Don't Know=8
Refused=9

if Q46=1
46A. And, is that:
Under $15,000=1
$15,000 to $24,999=2
$25,000 to $34,999=3
$35,000 to $49,999=4
Don't know=8
Refused=9

If Q46=2
46B. And, is that:
$50,000 to $74,999=1
$75,000 to $99,999=2
$100,000 or more=3
Don't know=8
Refused=9

47. What is your 5-digit zip code?
[number]

48. Do you live east or west of I-95?
East=1
West=2
Not sure=8
Refuse=9

49. What neighborhood is that?
[text]

50. Do you own a farm or other agricultural-based business?
Yes=1
No=2
Don't know=8
Refuse=9

51. Do you work for a farm or other agricultural-based business?
Yes=1
No=2
Don't know=8
Refuse=9

52. Do you have any questions regarding this study or your rights as a participant?
Yes=1
No=2
Don't know=8
Refuse=9

if Q52=1
For questions regarding this study you may contact Dr. Mike Scicchitano at the Florida Survey Research Center toll free at 866-392-3475 or at mscicc@ufl.edu. For questions regarding your rights as a participant you may contact the University of Florida Institutional Review Board at 352-392-0433.

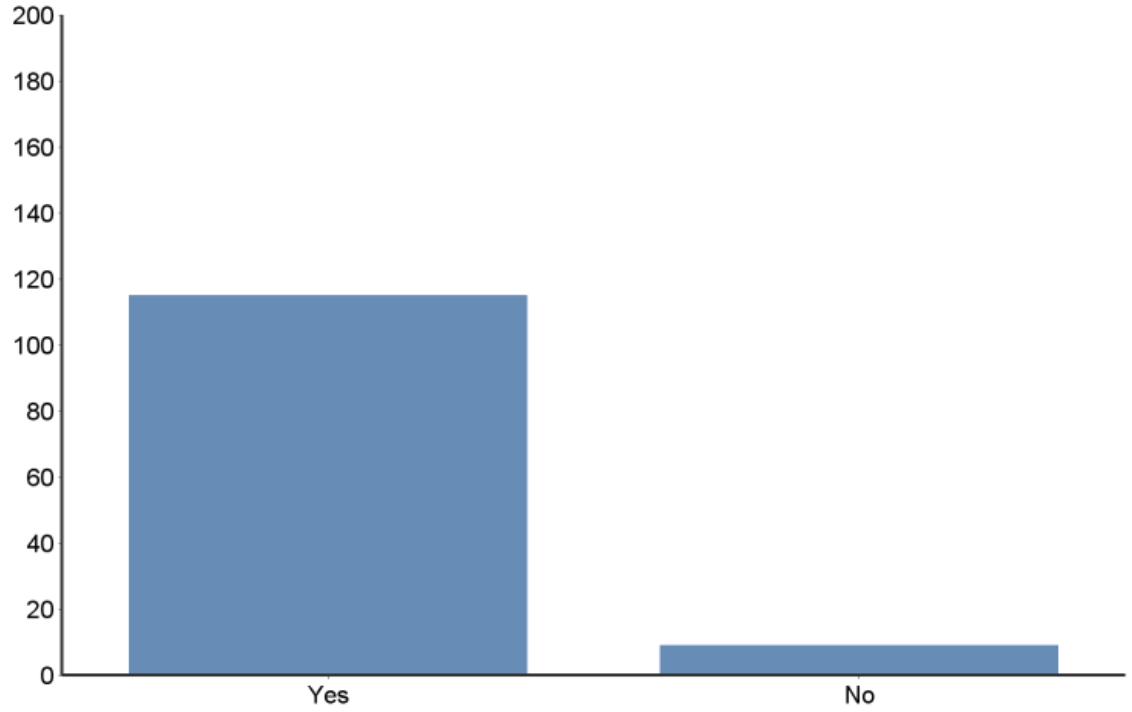
That concludes our survey. Thank you very much for your time and participation.

APPENDIX 4

MARTIN COUNTY
FOOD SYSTEM FEASIBILITY STUDY

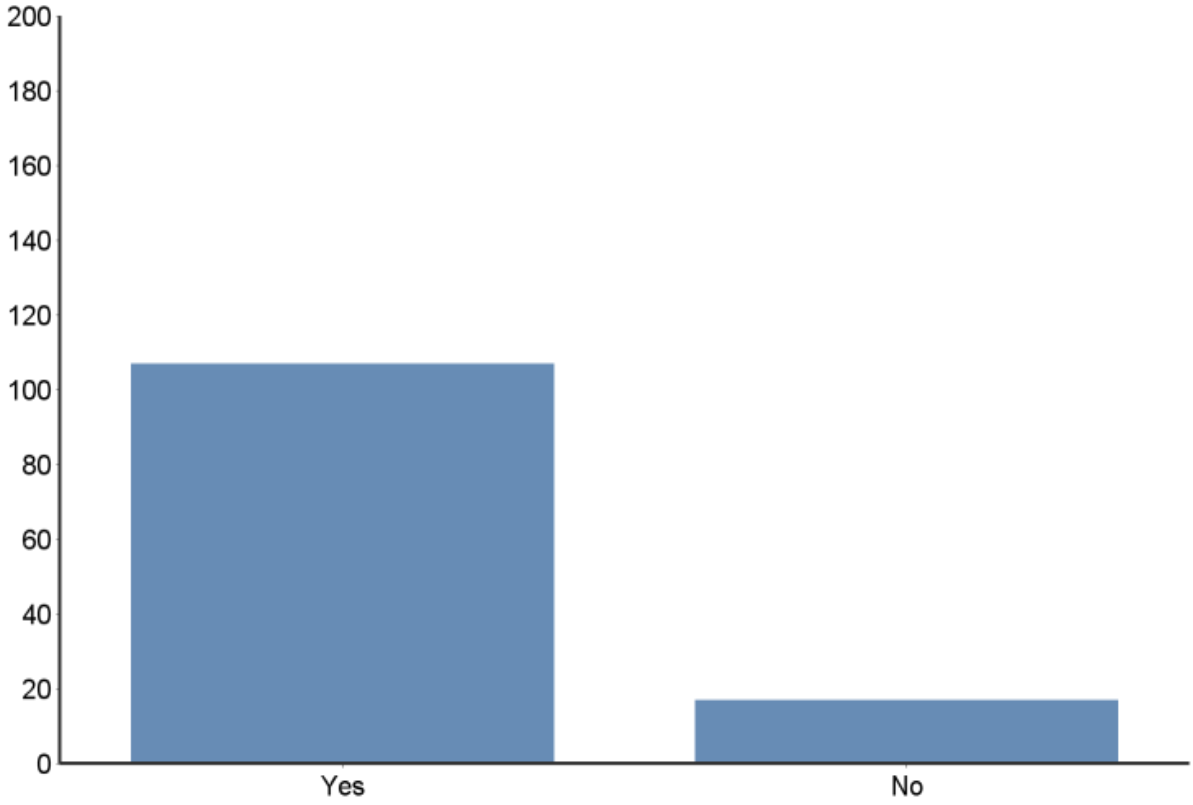
Responses to Online Consumer Survey

Do you live in Martin county?



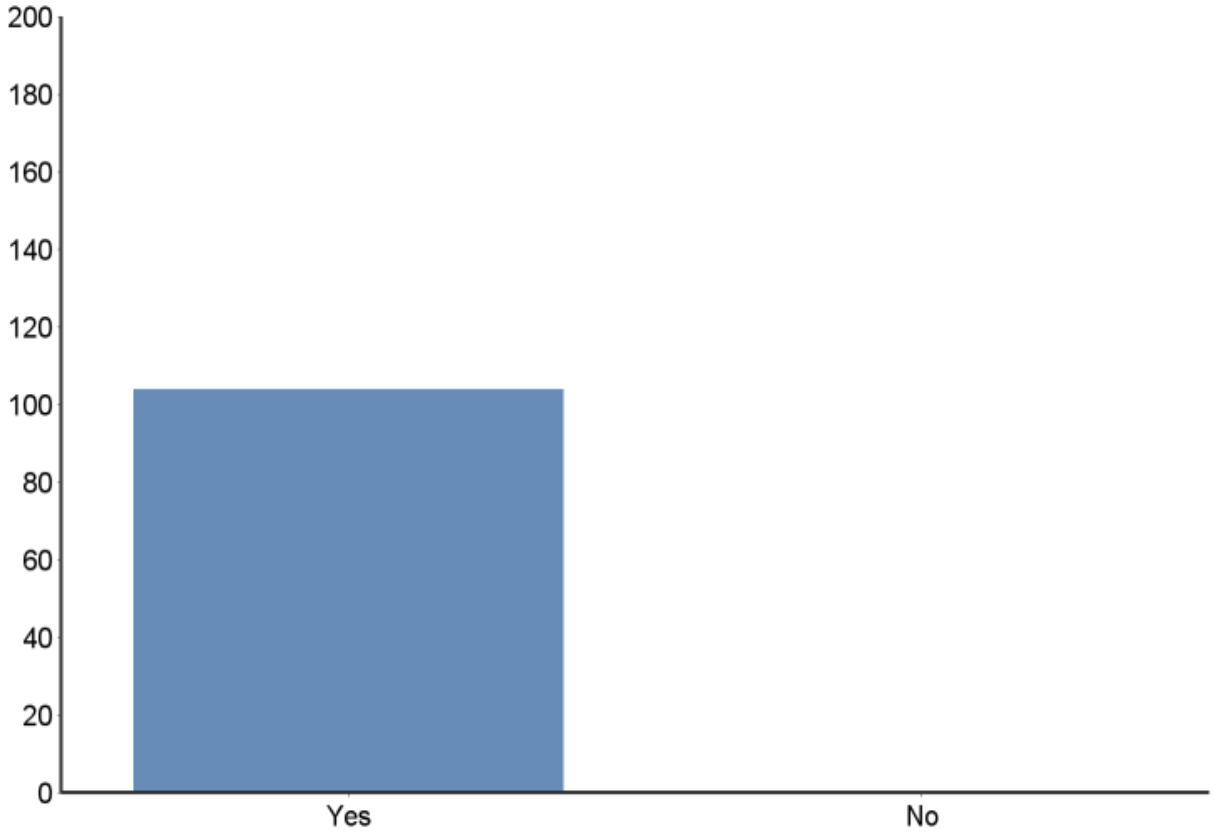
#	Answer	Bar	Response	%
1	Yes		115	92.74%
2	No		9	7.26%
	Total		124	100.00%

Are you the person in the household that does most of the grocery shopping?



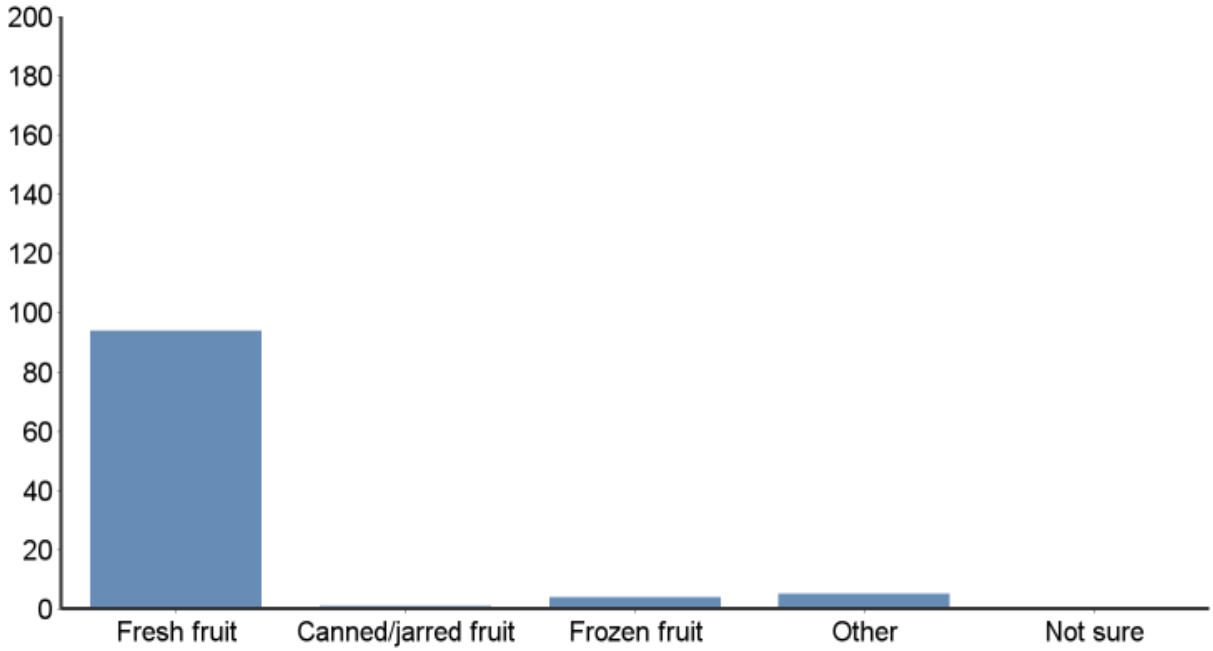
#	Answer	Bar	Response	%
1	Yes		107	86.29%
2	No		17	13.71%
	Total		124	100.00%

Do you eat fruit?



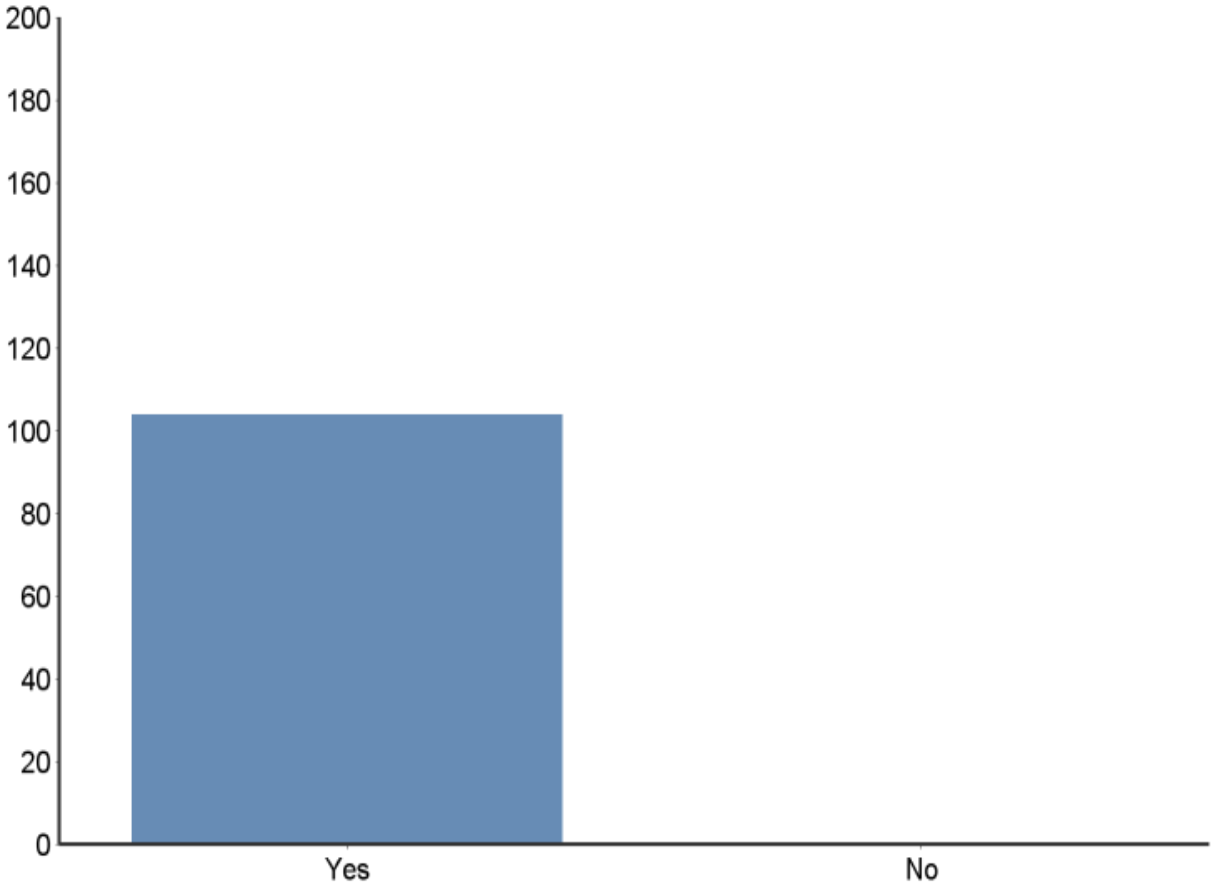
#	Answer	Bar	Response	%
1	Yes		104	100.00%
2	No		0	0.00%
	Total		104	100.00%

When you buy fruit, do you most often buy:



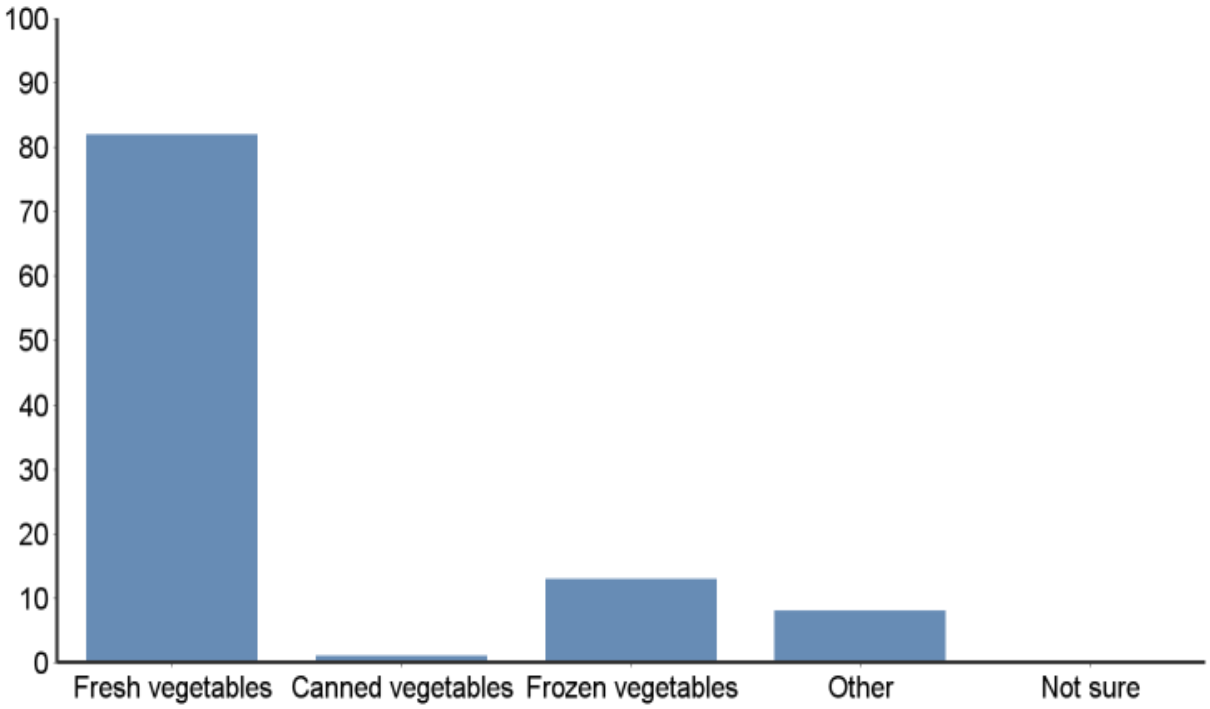
#	Answer	Bar	Response	%
1	Fresh fruit		94	90.38%
2	Canned/jarred fruit		1	0.96%
3	Frozen fruit		4	3.85%
4	Other = organic, non-GMO, both fresh and canned, all		5	4.81%
5	Not sure		0	0.00%
	Total		104	100.00%

Do you eat vegetables?



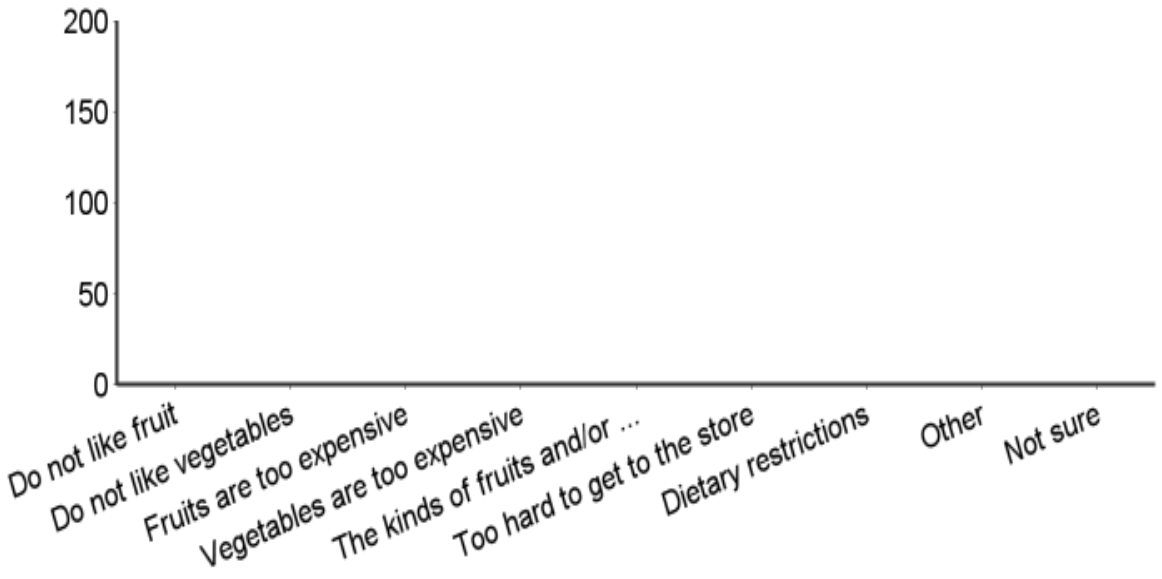
#	Answer	Bar	Response	%
1	Yes		104	100.00%
2	No		0	0.00%
	Total		104	100.00%

When you buy vegetables, do you most often buy:



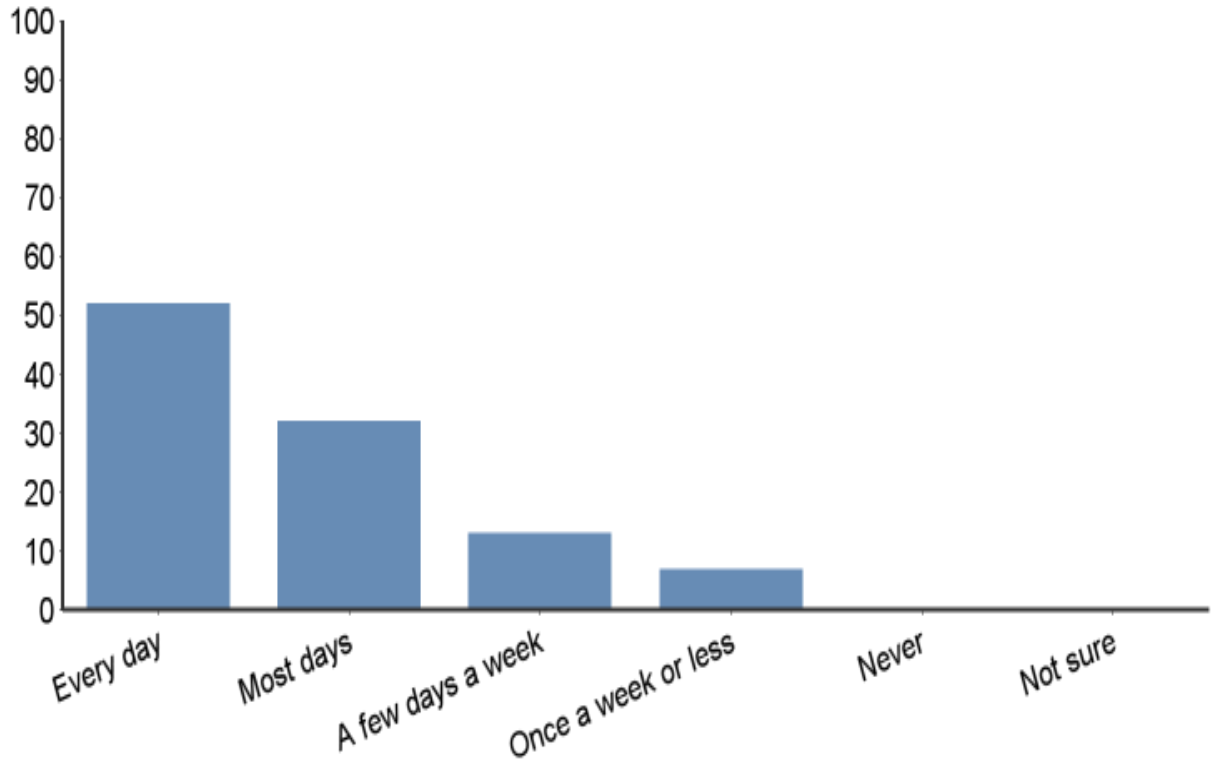
#	Answer	Bar	Response	%
1	Fresh vegetables		82	78.85%
2	Canned vegetables		1	0.96%
3	Frozen vegetables		13	12.50%
4	Other = fresh and frozen about equal, organic, all, non-GMO, both fresh and frozen		8	7.69%
5	Not sure		0	0.00%
	Total		104	100.00%

Why don't you ever eat fruits and/or vegetables? (please select all that apply)



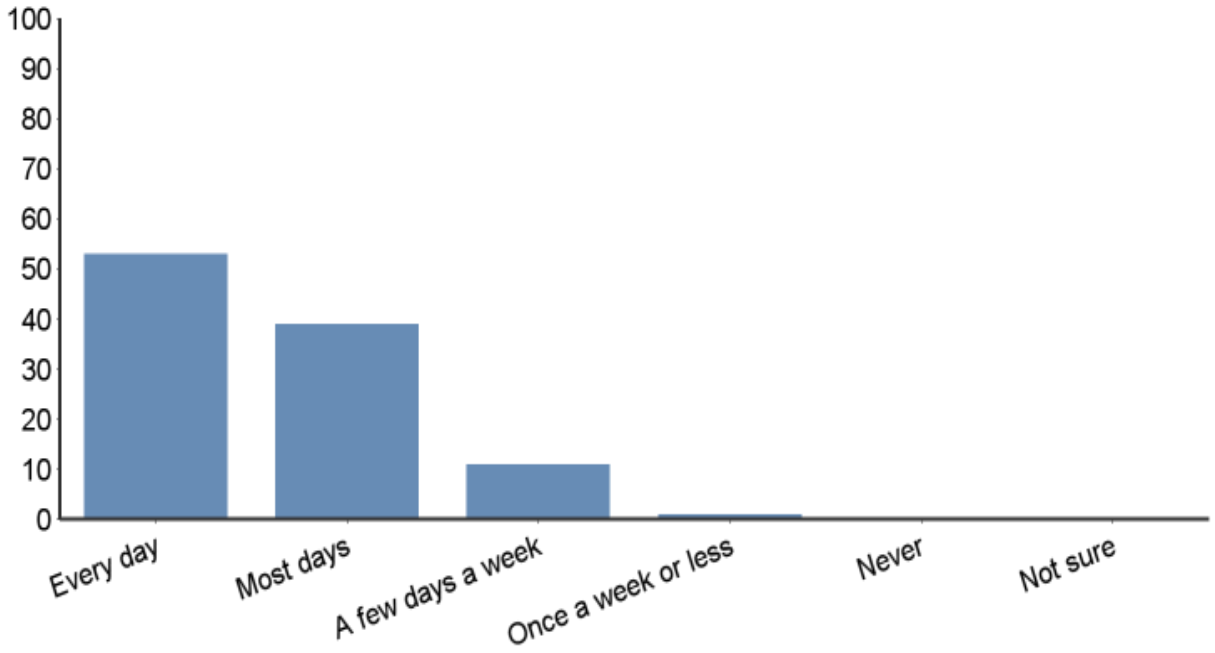
#	Answer	Bar	Response	%
1	Do not like fruit		0	0.00%
2	Do not like vegetables		0	0.00%
3	Fruits are too expensive		0	0.00%
4	Vegetables are too expensive		0	0.00%
5	The kinds of fruits and/or vegetables I want aren't available locally		0	0.00%
6	Too hard to get to the store		0	0.00%
7	Dietary restrictions		0	0.00%
8	Other		0	0.00%
9	Not sure		0	0.00%
	Total		0	100.00%

How often do you eat fresh fruit?



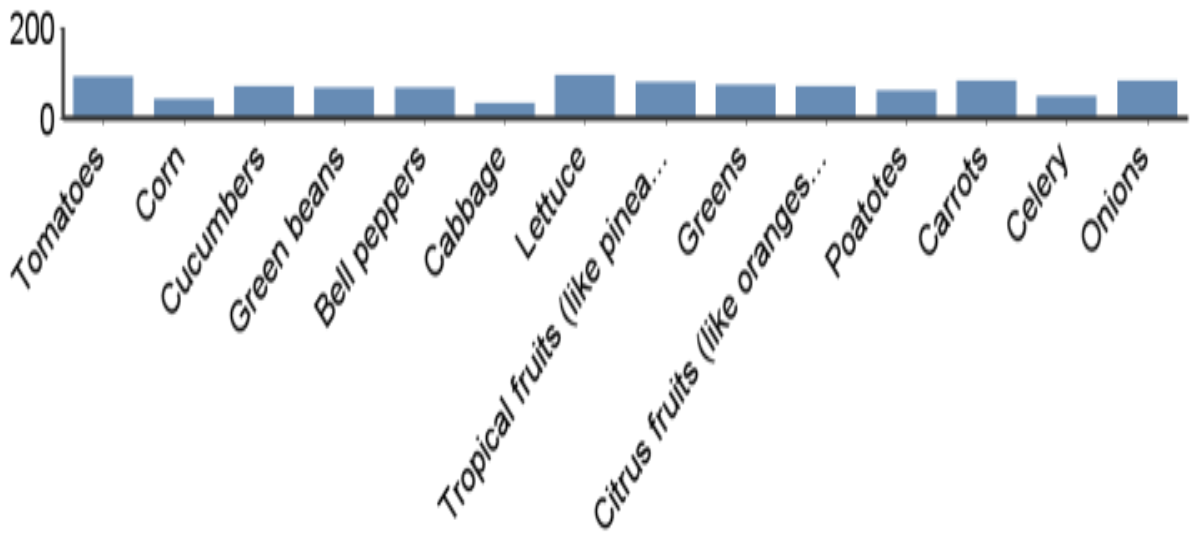
#	Answer	Bar	Response	%
1	Every day		52	50.00%
2	Most days		32	30.77%
3	A few days a week		13	12.50%
4	Once a week or less		7	6.73%
5	Never		0	0.00%
6	Not sure		0	0.00%
	Total		104	100.00%

How often do you eat fresh vegetables?



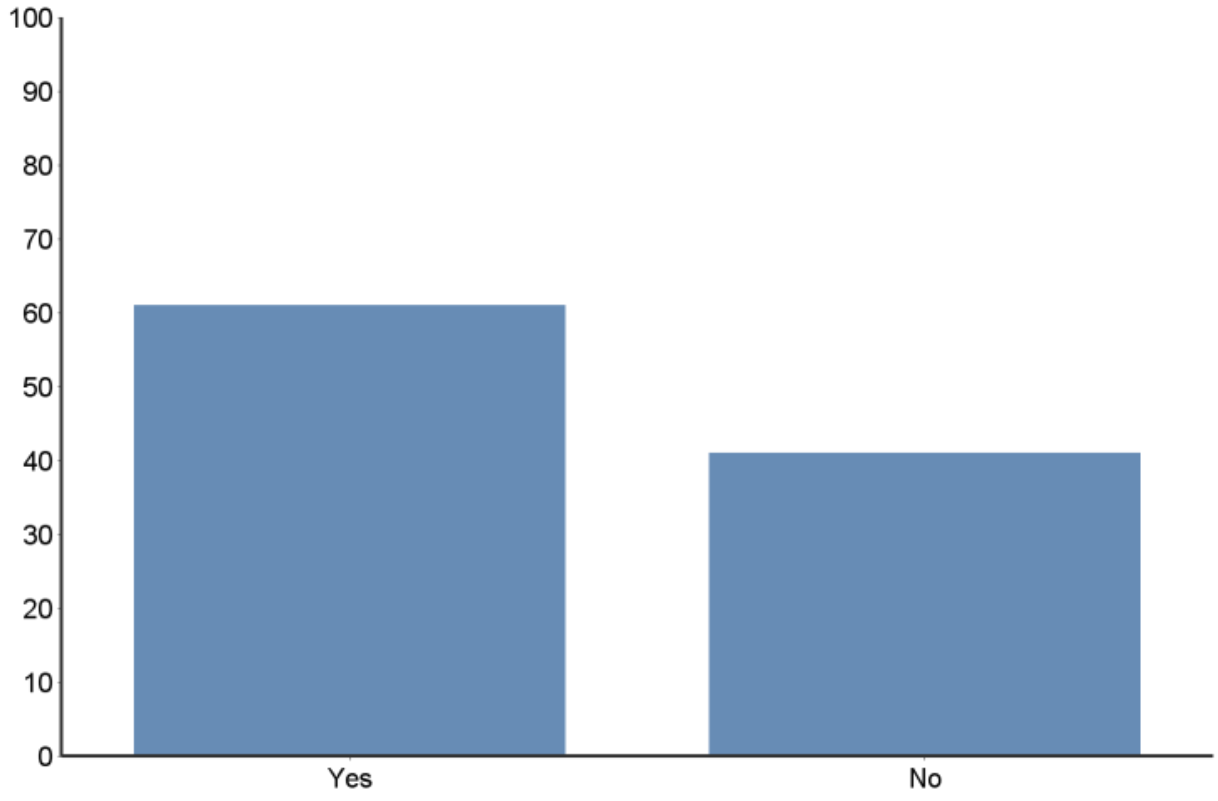
#	Answer	Bar	Response	%
1	Every day		53	50.96%
2	Most days		39	37.50%
3	A few days a week		11	10.58%
4	Once a week or less		1	0.96%
5	Never		0	0.00%
6	Not sure		0	0.00%
	Total		104	100.00%

Which of the following fresh fruits and vegetables do you eat on a regular basis, or when they are in season?



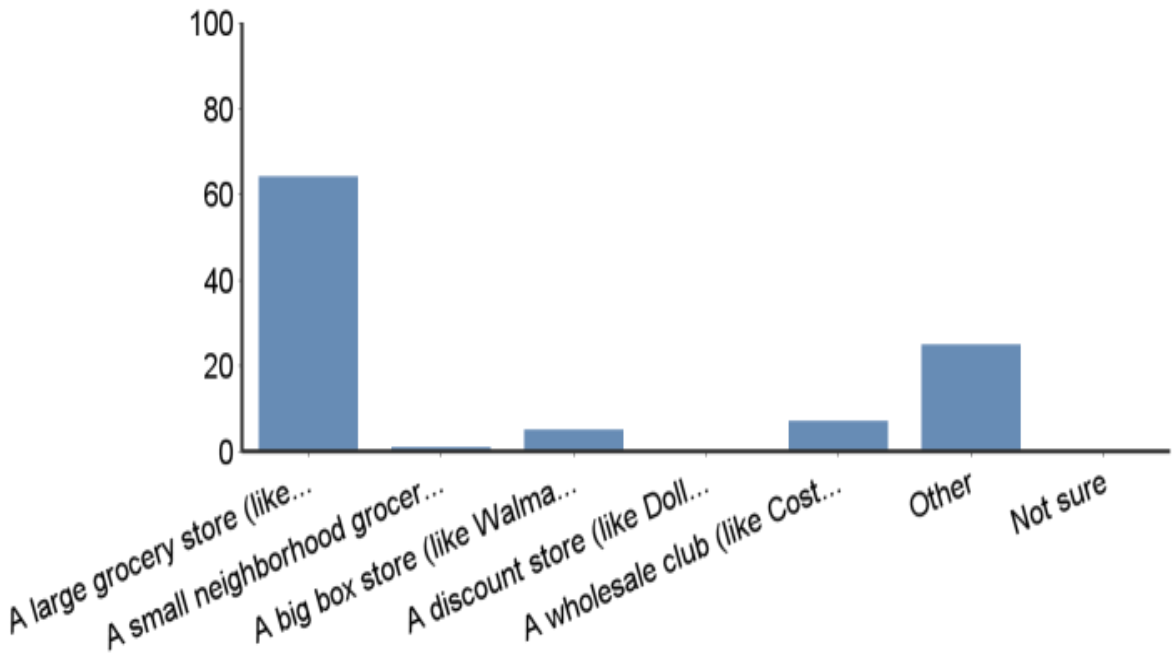
#	Answer	Bar	Response	%
1	Tomatoes		93	91%
2	Corn		44	43%
3	Cucumbers		72	71%
4	Green beans		68	67%
5	Bell peppers		68	67%
6	Cabbage		33	32%
7	Lettuce		94	92%
8	Tropical fruits (like pineapple, mango, etc.)		80	78%
9	Greens		74	73%
10	Citrus fruits (like oranges, grapefruit, etc.)		71	70%
11	Poatotes		62	61%
12	Carrots		82	80%
13	Celery		50	49%
14	Onions		84	82%
	Total		975	100%

Do you consume as many fresh fruits and vegetables as you would like?



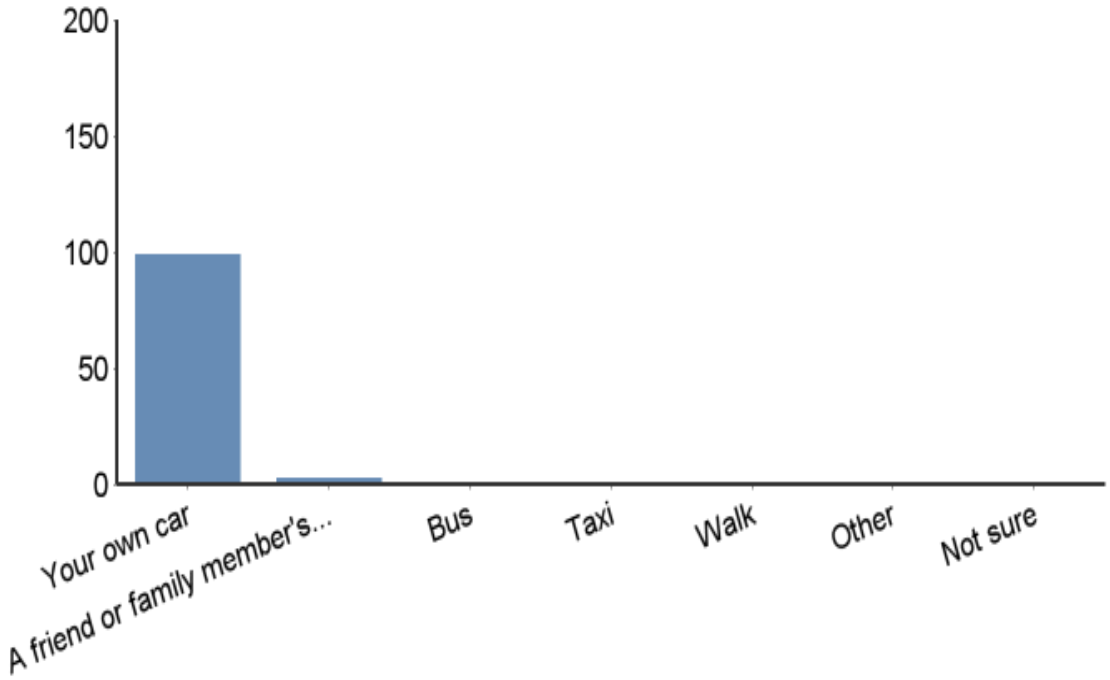
#	Answer	Bar	Response	%
1	Yes		61	59.80%
2	No		41	40.20%
	Total		102	100.00%

Where do you do most of your food shopping?



#	Answer	Bar	Response	%
1	A large grocery store (like Publix or Winn Dixie)		64	62.75%
2	A small neighborhood grocery store		1	0.98%
3	A big box store (like Walmart or Target)		5	4.90%
4	A discount store (like Dollar General or Family Dollar)		0	0.00%
5	A wholesale club (like Costco, Sam's, or BJ's)		7	6.86%
6	Other = farm stand, Aldi, fruit stand		25	24.51%
7	Not sure		0	0.00%
	Total		102	100.00%

How do you typically get to and from the place where you do most of your grocery shopping? Most often, do you use:

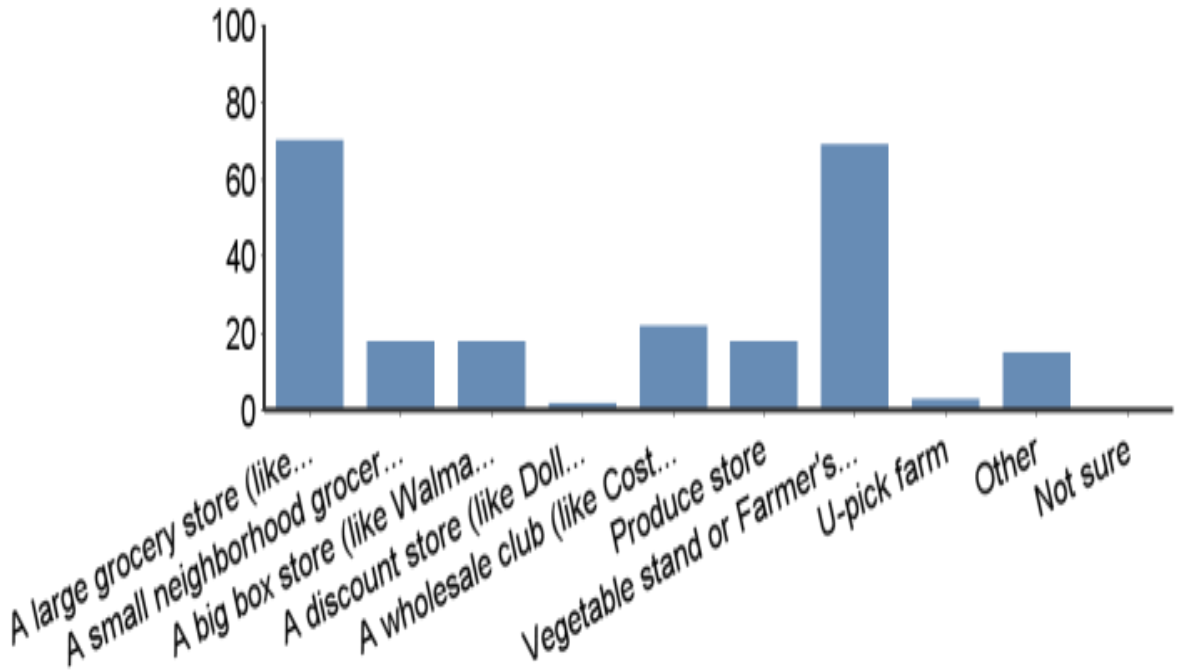


#	Answer	Bar	Response	%
1	Your own car		99	97.06%
2	A friend or family member's car		3	2.94%
3	Bus		0	0.00%
4	Taxi		0	0.00%
5	Walk		0	0.00%
6	Other		0	0.00%
7	Not sure		0	0.00%
	Total		102	100.00%

How much does your household usually spend on groceries each week?

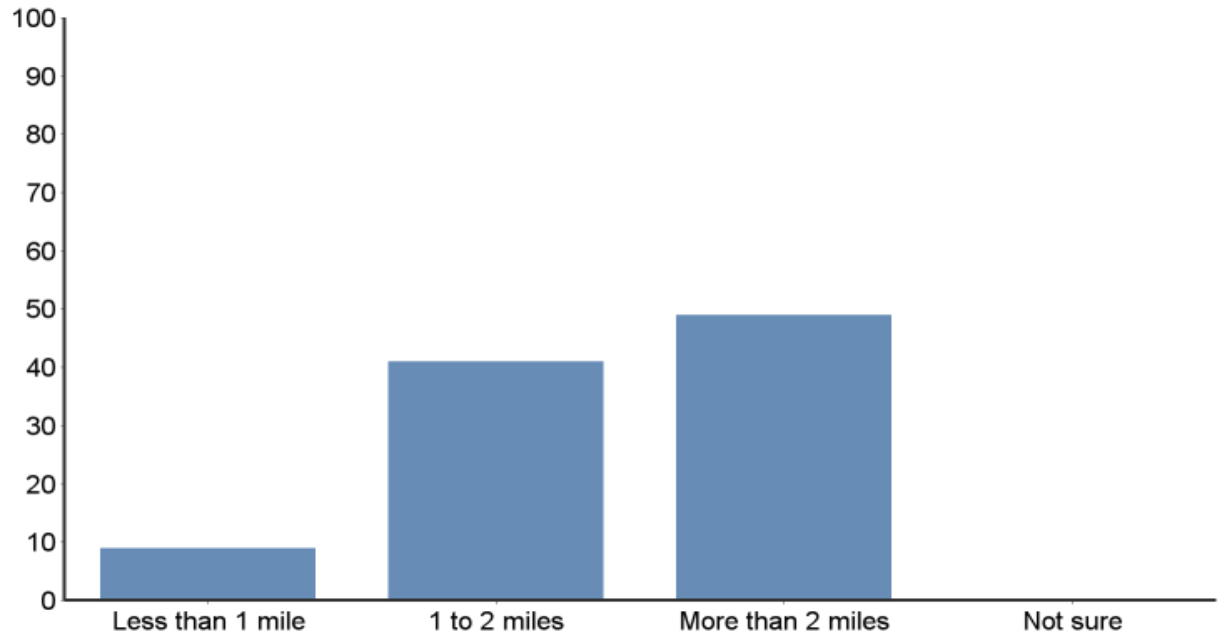
AMOUNT	NUMBER OF RESPONSES
Less than $50	5
$50 to $74	12
$75 to $99	14
$100 to $149	32
$150 to $199	19
$200 to $249	8
$250 to $299	4
$300 to $349	5

Where do you purchase fresh fruits and vegetables? (select all that apply)



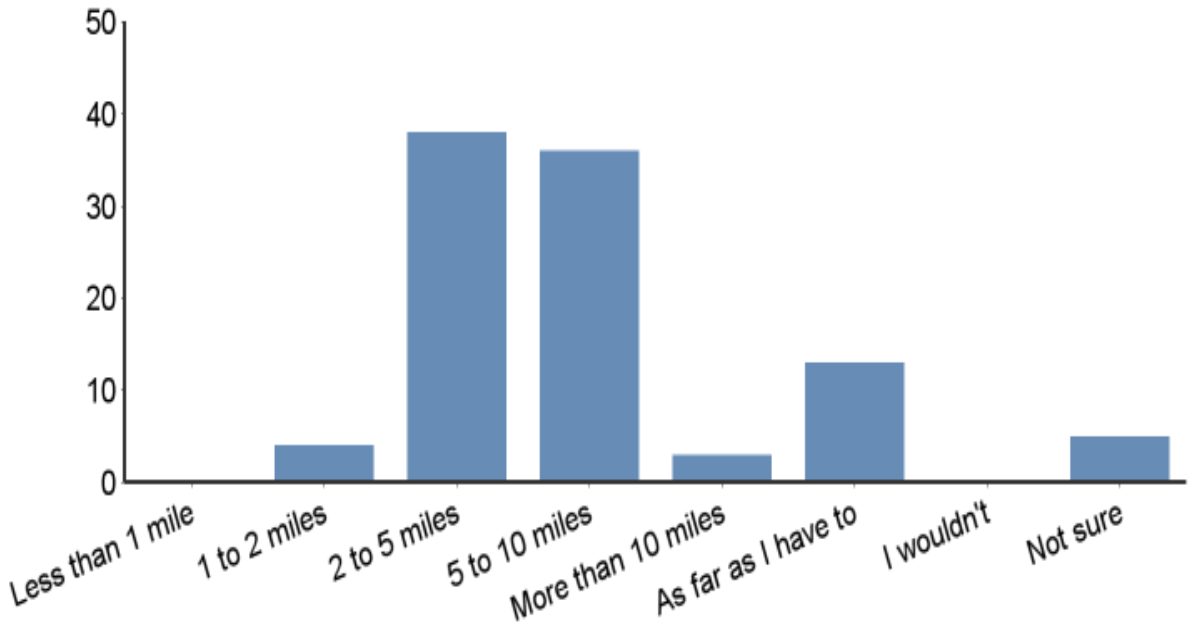
#	Answer	Bar	Response	%
1	A large grocery store (like Publix or Winn Dixie)		70	69.31%
2	A small neighborhood grocery store		18	17.82%
3	A big box store (like Walmart or Target)		18	17.82%
4	A discount store (like Dollar General or Family Dollar)		2	1.98%
5	A wholesale club (like Costco, Sam's, or BJ's)		22	21.78%
6	Produce store		18	17.82%
7	Vegetable stand or Farmer's market		69	68.32%
8	U-pick farm		3	2.97%
9	Other = Aldi, grow my own, Fresh Market,		15	14.85%
10	Not sure		0	0.00%
	Total		235	100.00%

How far do you live from the place where you most often purchase fresh fruits and vegetables?



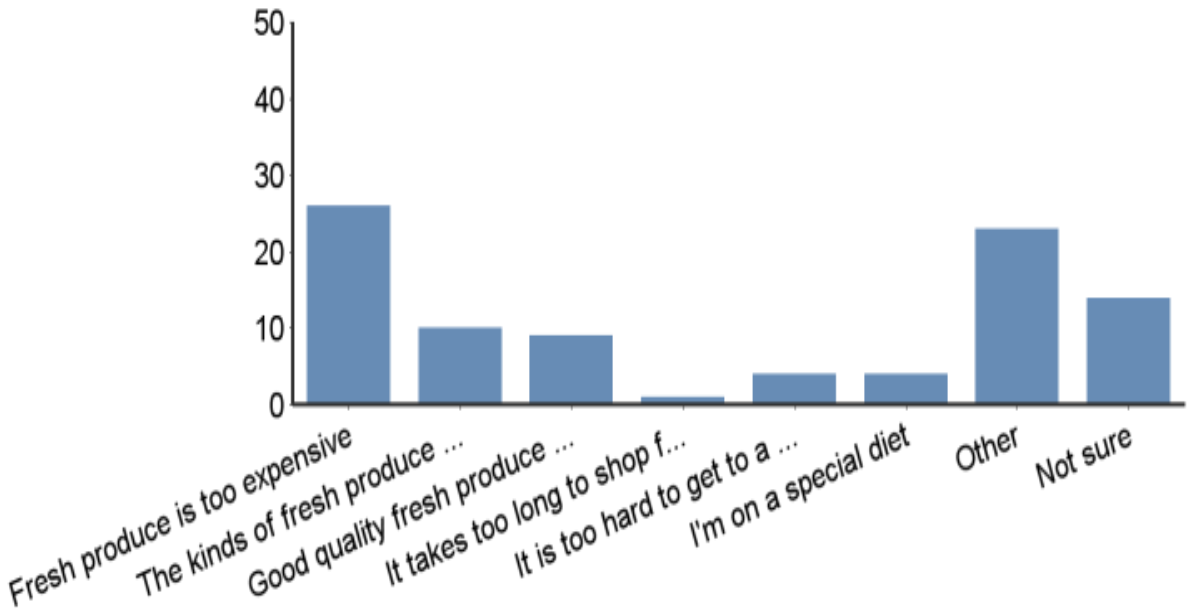
#	Answer	Bar	Response	%
1	Less than 1 mile		9	9.09%
2	1 to 2 miles		41	41.41%
3	More than 2 miles		49	49.49%
4	Not sure		0	0.00%
	Total		99	100.00%

If this location were not an option for buying fresh fruits and vegetables, how far would you be willing to travel to purchase fresh fruits and vegetables?



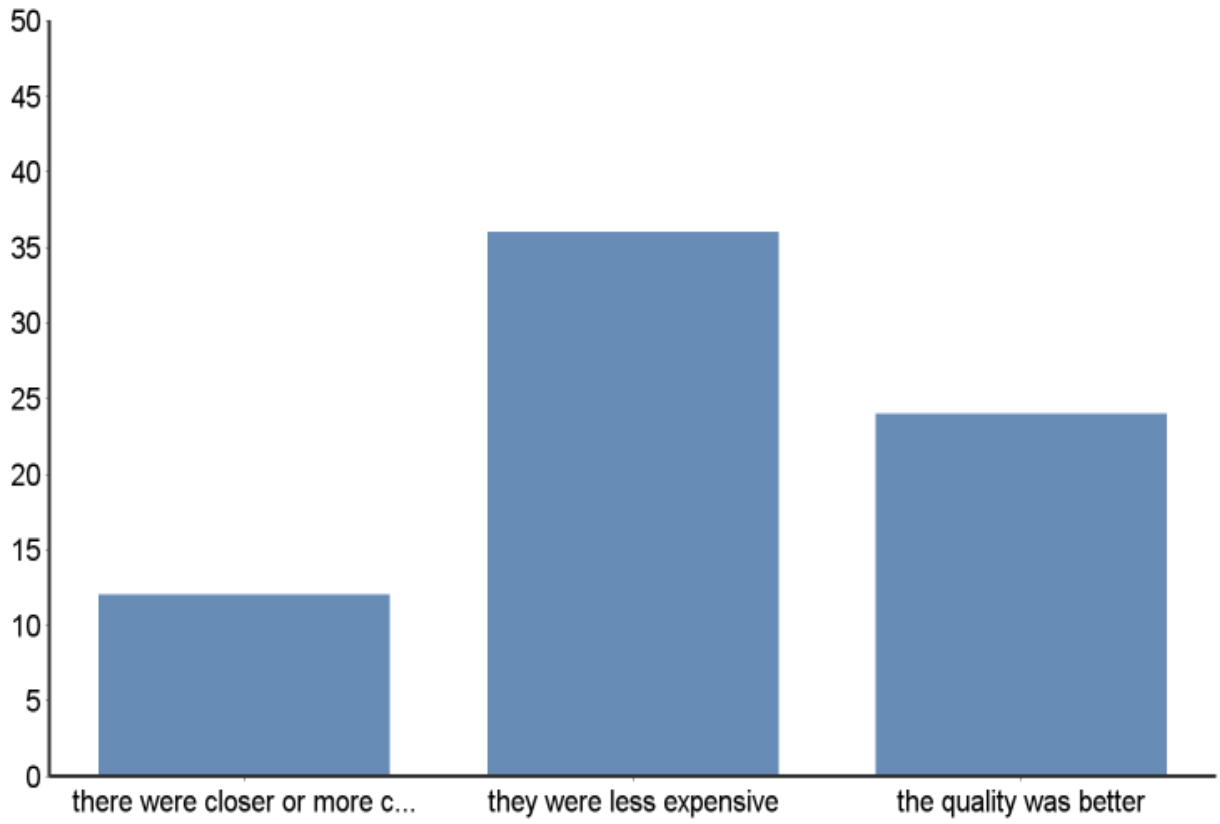
#	Answer	Bar	Response	%
1	Less than 1 mile		0	0.00%
2	1 to 2 miles		4	4.04%
3	2 to 5 miles		38	38.38%
4	5 to 10 miles		36	36.36%
5	More than 10 miles		3	3.03%
6	As far as I have to		13	13.13%
7	I wouldn't		0	0.00%
8	Not sure		5	5.05%
	Total		99	100.00%

Please tell me if any of these things limit your purchase of fresh fruits and vegetables. Select all that apply.



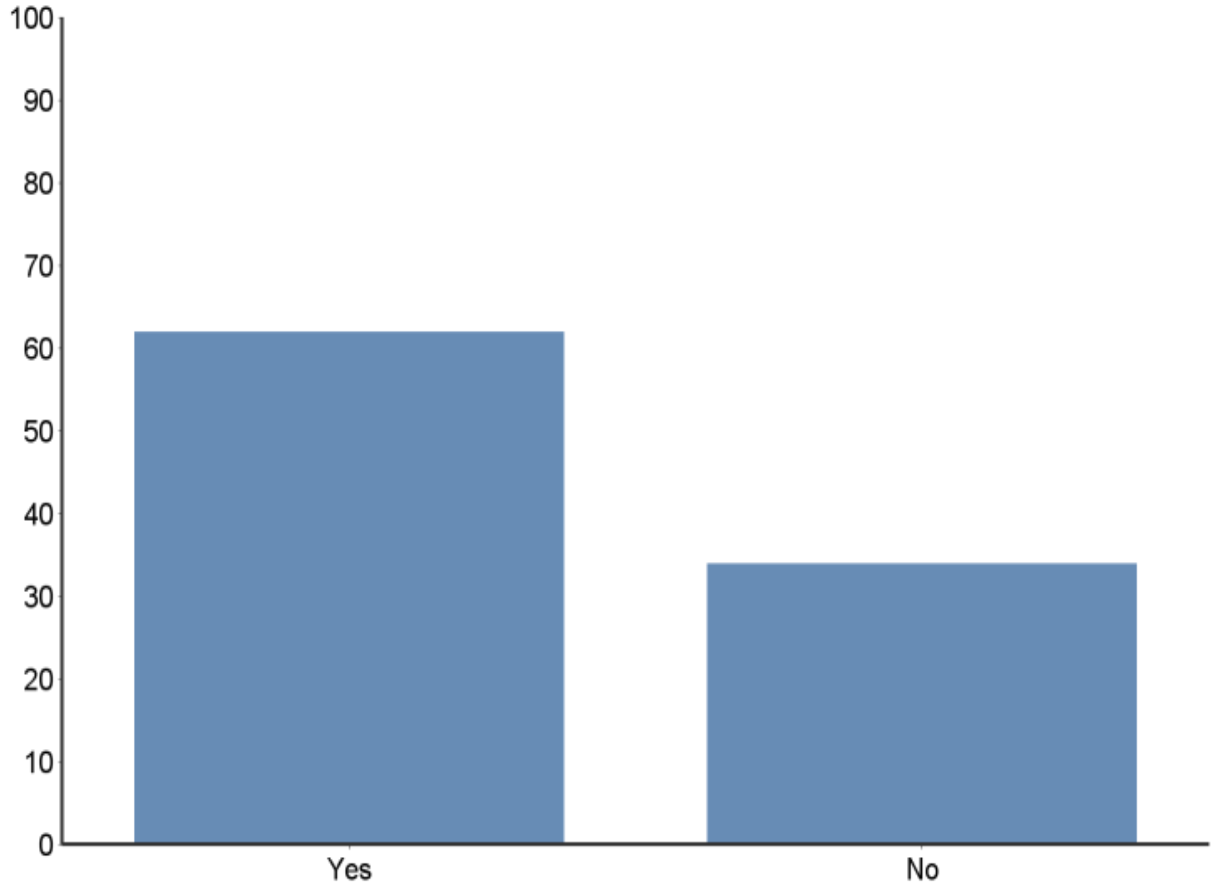
#	Answer	Bar	Response	%
1	Fresh produce is too expensive		26	36.11%
2	The kinds of fresh produce I want are not available locally		10	13.89%
3	Good quality fresh produce is not available where I usually shop		9	12.50%
4	It takes too long to shop for fresh prodpuce		1	1.39%
5	It is too hard to get to a store that sells fresh produce		4	5.56%
6	I'm on a special diet		4	5.56%
7	Other = good quality not always available, availability of organics, some items too expensive		23	31.94%
8	Not sure		14	19.44%
	Total		91	100.00%

Would your household eat more fresh fruit and vegetables if:



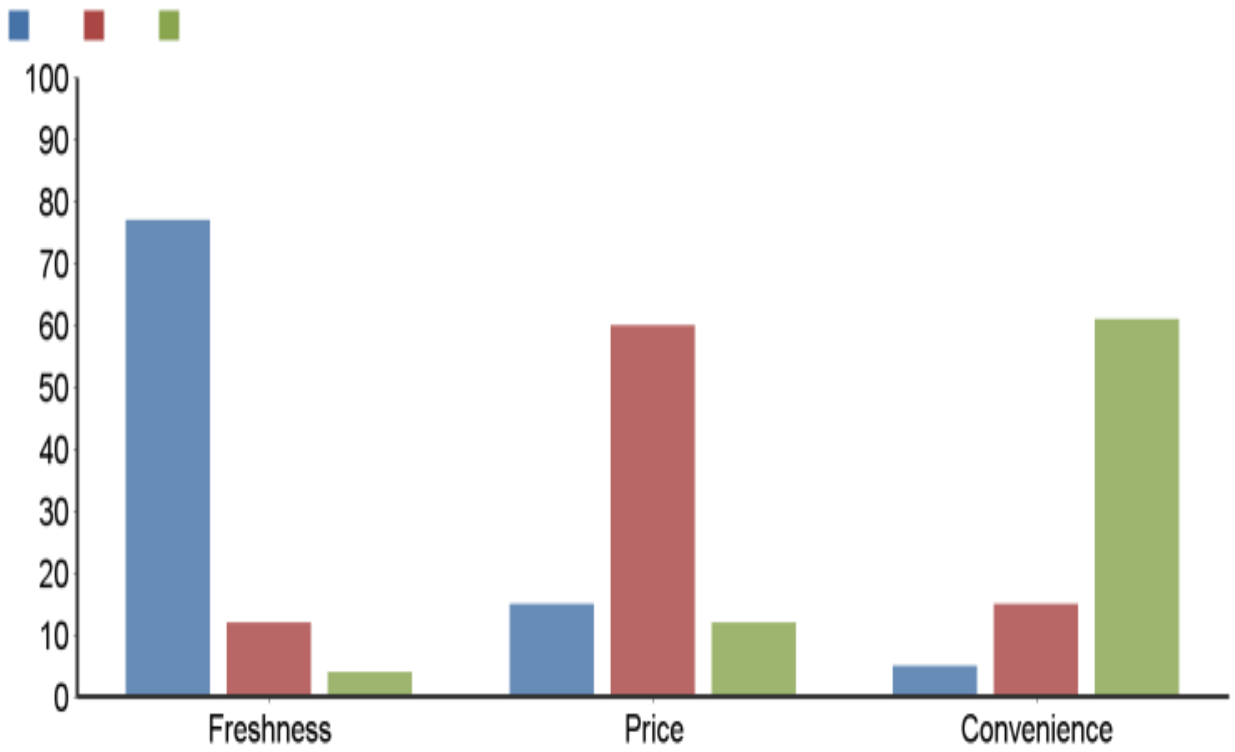
#	Answer	Bar	Response	%
1	there were closer or more convenient places to buy them		12	21.43%
2	they were less expensive		36	64.29%
3	the quality was better		24	42.86%
	Total		72	100.00%

Do you grow any fruits or vegetables at home for your own consumption?



#	Answer	Bar	Response	%
1	Yes		62	64.58%
2	No		34	35.42%
	Total		96	100.00%

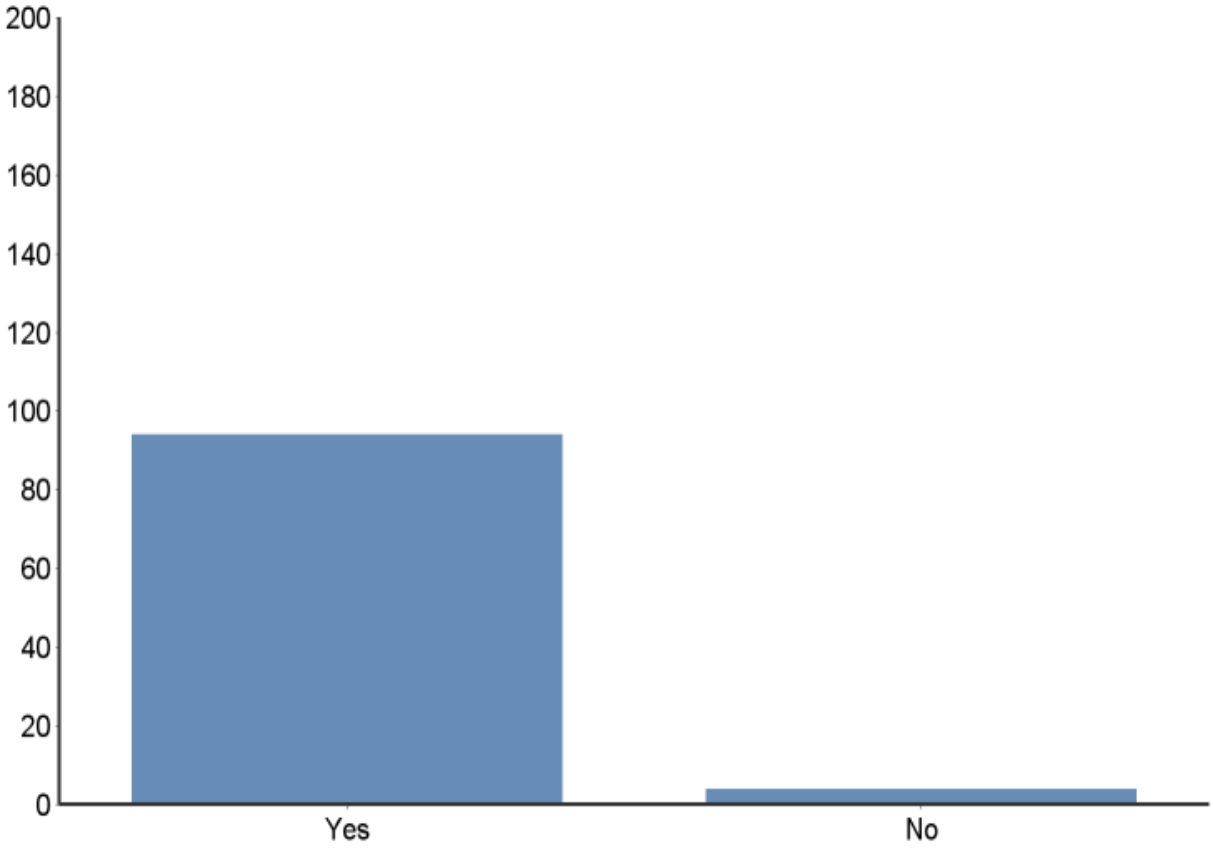
Below are three things people consider when buying fresh fruit and vegetables. Please indicate the order of importance to you (with 1 being most important):



#	Answer	Rank1	Rank2	Rank3	Responses	Mean
1	Freshness	77	12	4	93	1.22
2	Price	15	60	12	87	1.97
3	Convenience	5	15	61	81	2.69
	Total	97	87	77	-	-

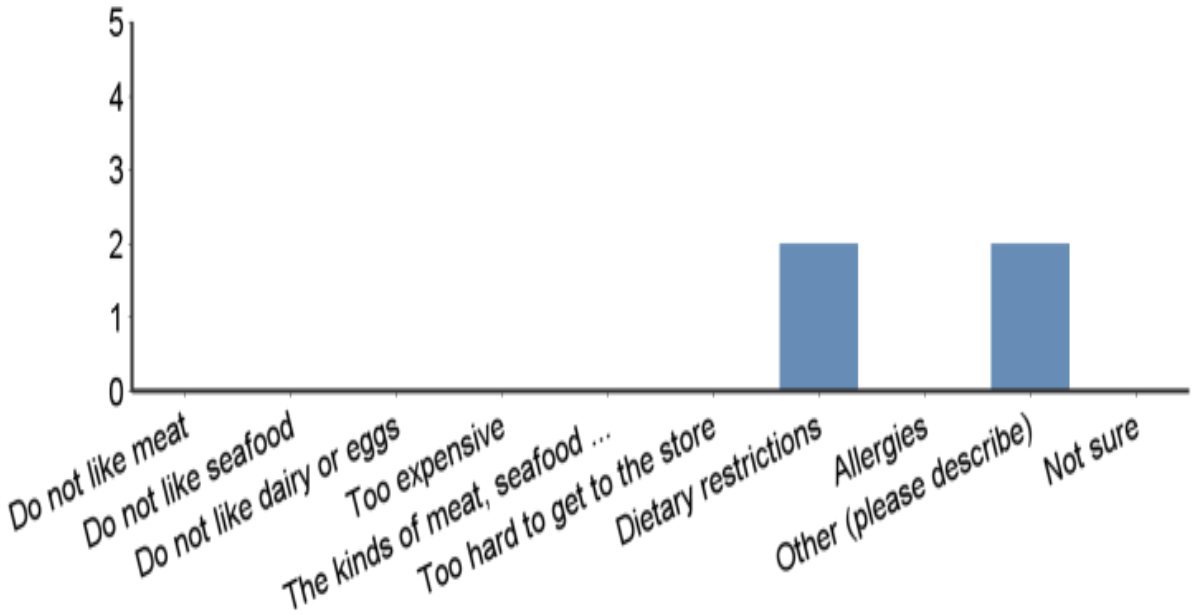
Next, we have similar questions about meat, seafood, dairy, and eggs.

Do you eat any of the following: meat, seafood, dairy products, or eggs?



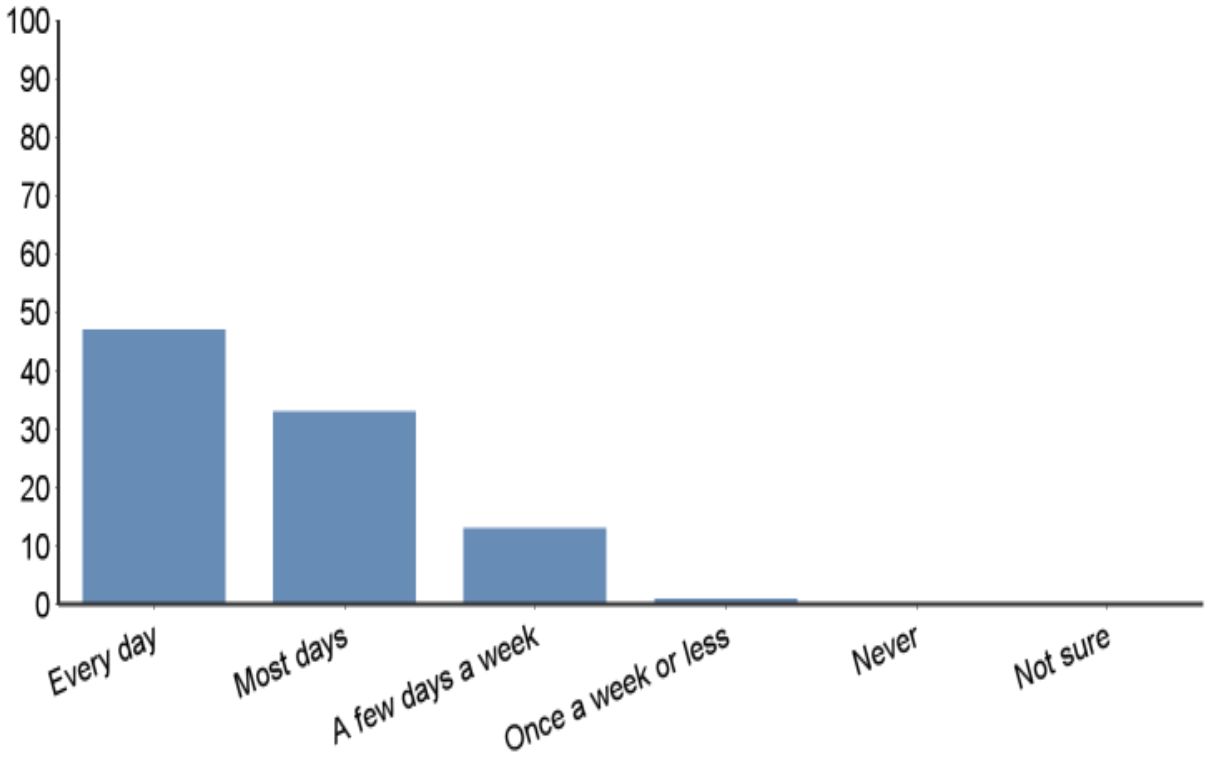
#	Answer	Bar	Response	%
1	Yes		94	95.92%
2	No		4	4.08%
	Total		98	100.00%

Why don't you ever eat meat, seafood, diary products, or eggs? (please select all that apply)



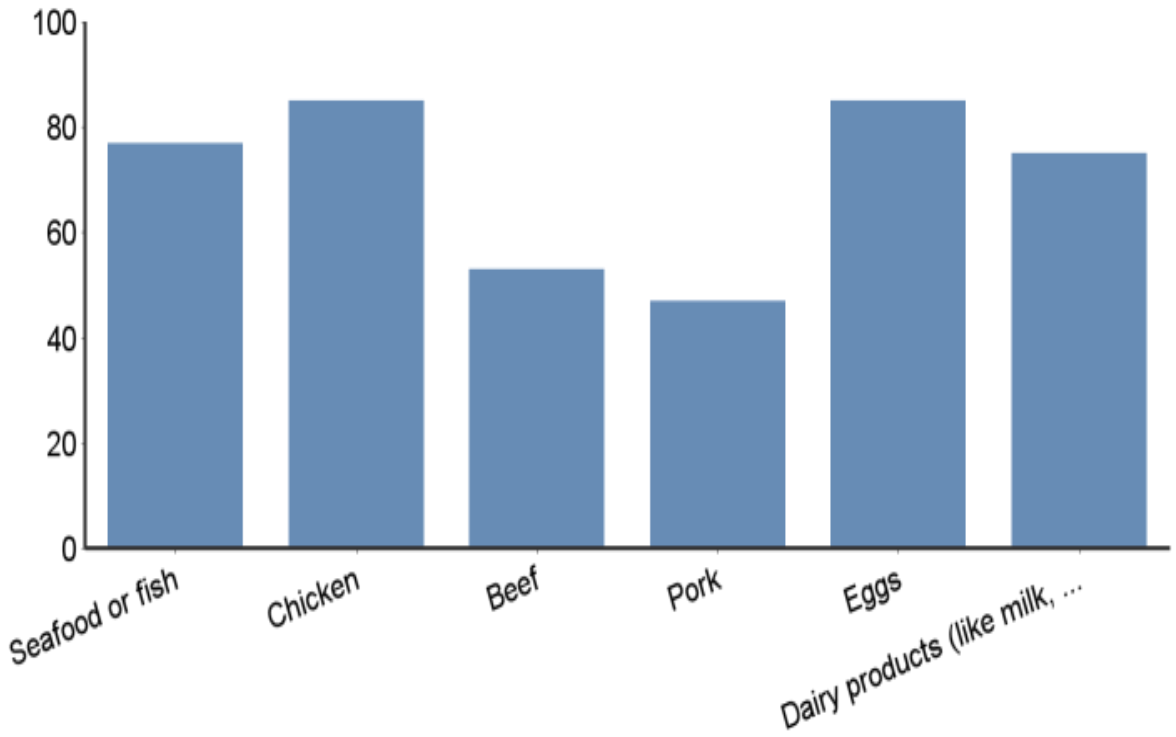
#	Answer	Bar	Response	%
1	Do not like meat		0	0.00%
2	Do not like seafood		0	0.00%
3	Do not like dairy or eggs		0	0.00%
4	Too expensive		0	0.00%
5	The kinds of meat, seafood or dairy products I want aren't available locally		0	0.00%
6	Too hard to get to the store		0	0.00%
7	Dietary restrictions		2	50.00%
8	Allergies		0	0.00%
9	Other (please describe) = animal welfare, my own health, food chain concentration of toxins, reality checking		2	50.00%
10	Not sure		0	0.00%
	Total		4	100.00%

How often do you eat meat, seafood, dairy products or eggs?



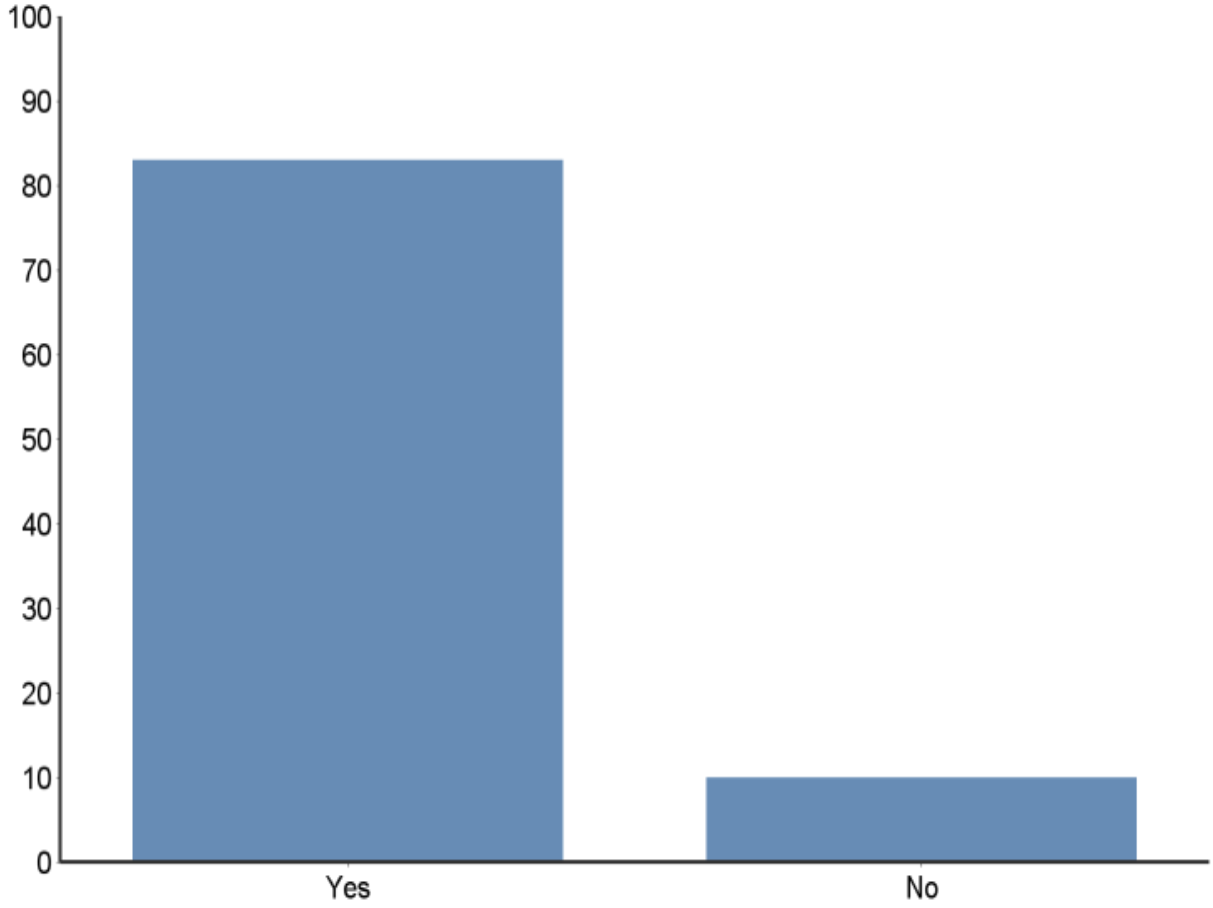
#	Answer	Bar	Response	%
1	Every day		47	50.00%
2	Most days		33	35.11%
3	A few days a week		13	13.83%
4	Once a week or less		1	1.06%
5	Never		0	0.00%
6	Not sure		0	0.00%
	Total		94	100.00%

Please indicate which of these you eat on a regular basis, or when they're in season. (Please select all that apply.)



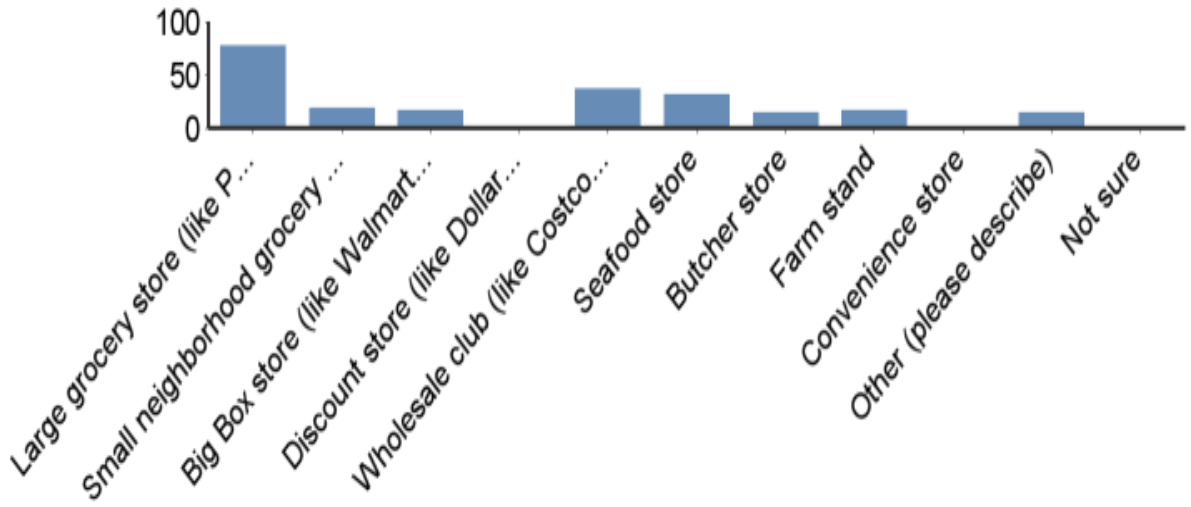
#	Answer	Bar	Response	%
1	Seafood or fish		77	82.80%
2	Chicken		85	91.40%
3	Beef		53	56.99%
4	Pork		47	50.54%
5	Eggs		85	91.40%
6	Dairy products (like milk, yogurt, or cheese)		75	80.65%
	Total		422	100.00%

Do you consume as many meat, seafood, dairy and egg products as you would like?



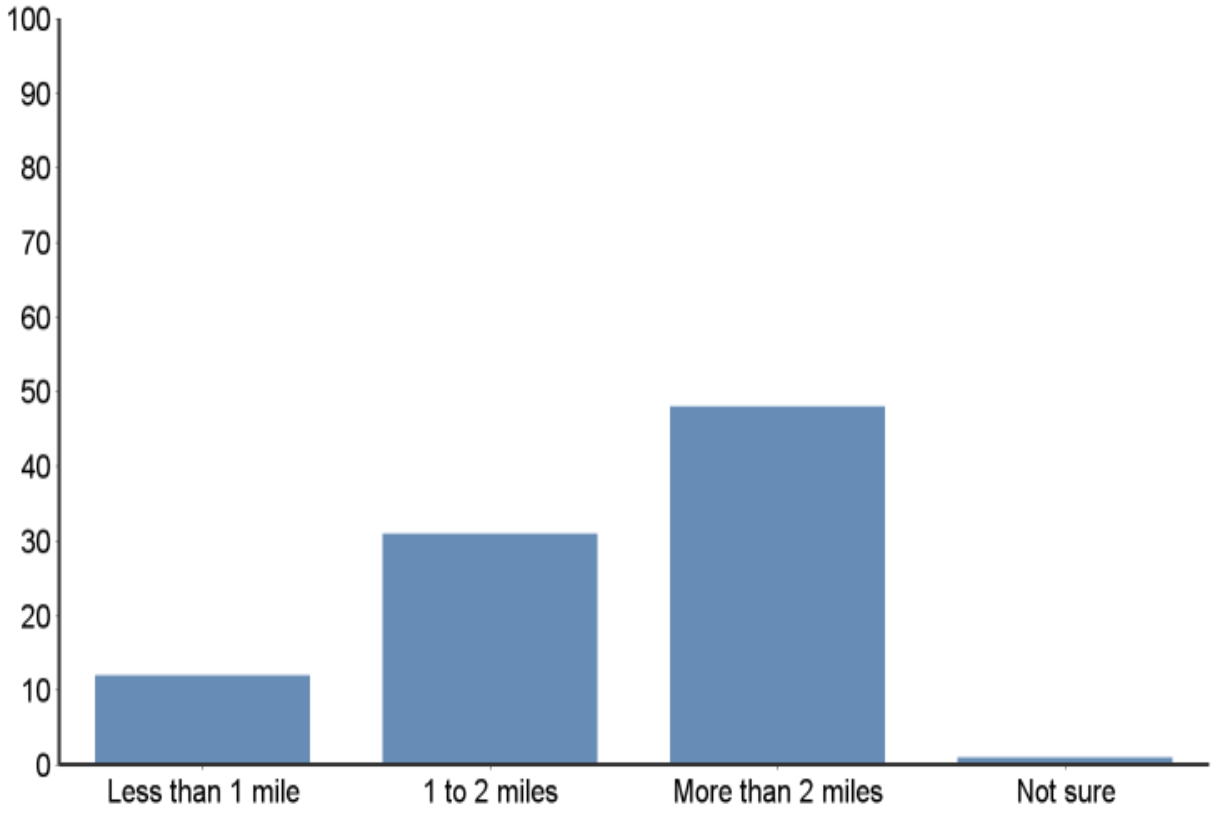
#	Answer	Bar	Response	%
1	Yes		83	89.25%
2	No		10	10.75%
	Total		93	100.00%

Where do you purchase meat, seafood, dairy or egg products? (please select all that apply)



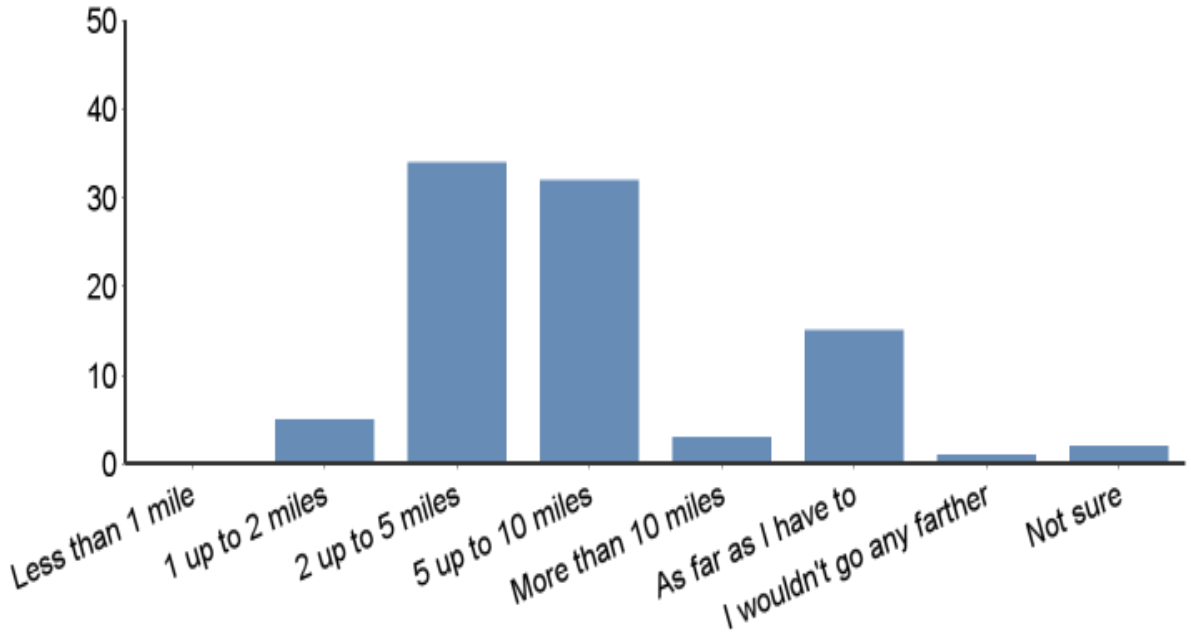
#	Answer	Bar	Response	%
1	Large grocery store (like Publix or Winn-Dixie)		78	84.78%
2	Small neighborhood grocery store		19	20.65%
3	Big Box store (like Walmart or Target)		17	18.48%
4	Discount store (like Dollar General or Family Dollar)		1	1.09%
5	Wholesale club (like Costco, Sam's, or BJ's		37	40.22%
6	Seafood store		32	34.78%
7	Butcher store		15	16.30%
8	Farm stand		17	18.48%
9	Convenience store		0	0.00%
10	Other (please describe) = raise our own, Aldi or Fresh Market, fresh game		15	16.30%
11	Not sure		0	0.00%
	Total		231	100.00%

How far do you live from the place where you most often purchase meat, seafood, dairy and egg products?



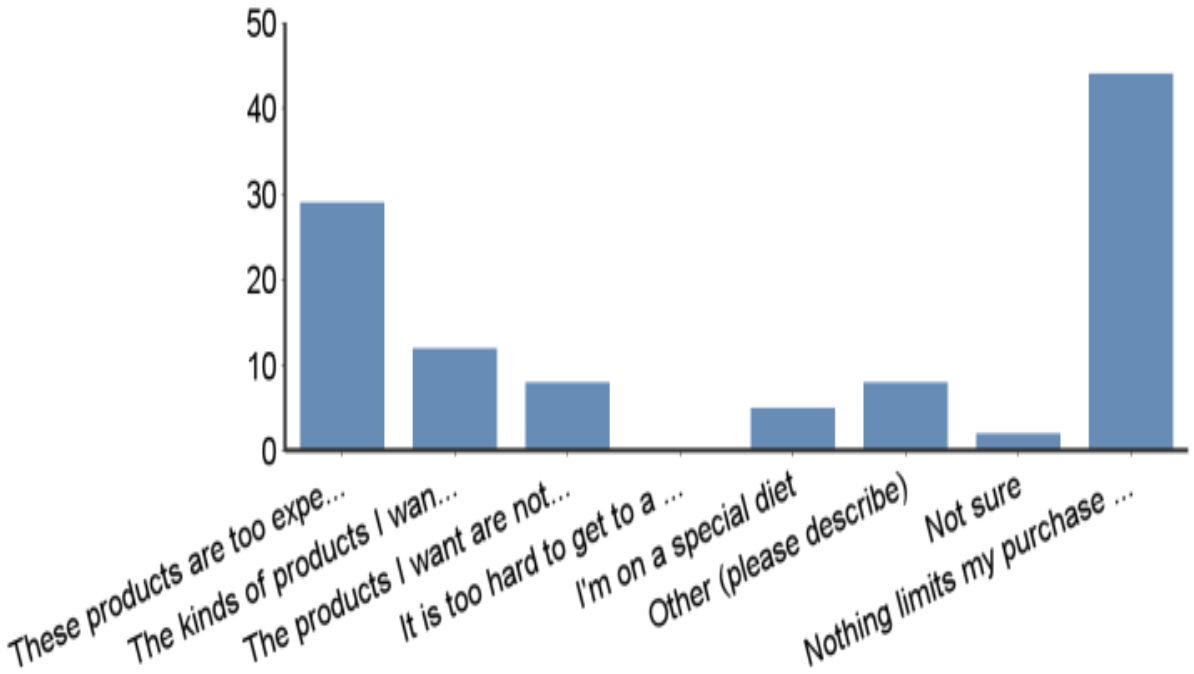
#	Answer	Bar	Response	%
1	Less than 1 mile		12	13.04%
2	1 to 2 miles		31	33.70%
3	More than 2 miles		48	52.17%
4	Not sure		1	1.09%
	Total		92	100.00%

If this location were not an option for buying meat, seafood, dairy and egg products, how far would you be willing to travel to purchase these products?



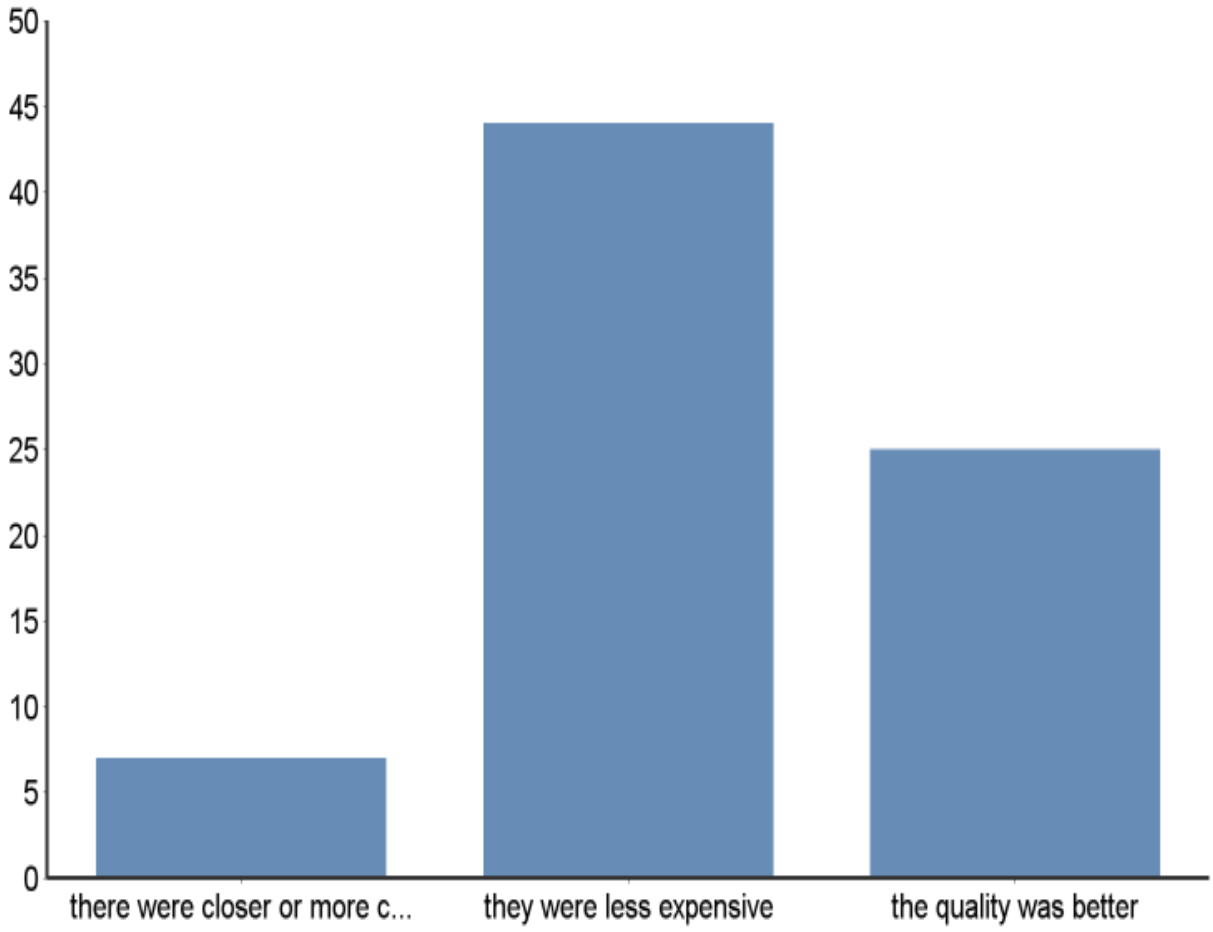
#	Answer	Bar	Response	%
1	Less than 1 mile		0	0.00%
2	1 up to 2 miles		5	5.43%
3	2 up to 5 miles		34	36.96%
4	5 up to 10 miles		32	34.78%
5	More than 10 miles		3	3.26%
6	As far as I have to		15	16.30%
7	I wouldn't go any farther		1	1.09%
8	Not sure		2	2.17%
	Total		92	100.00%

Please select any of these that limit your purchase of meat, seafood, dairy and eggs.



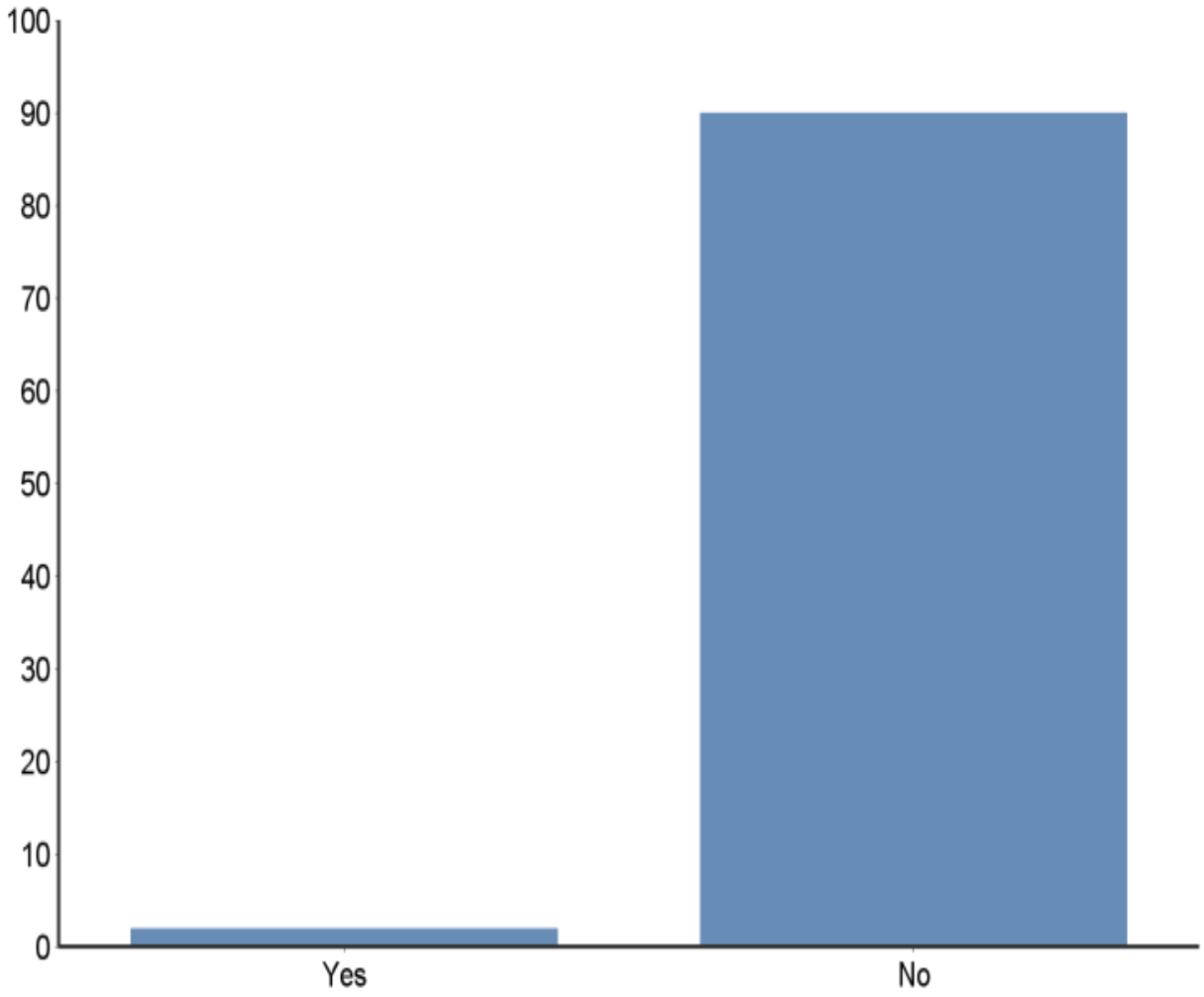
#	Answer	Bar	Response	%
1	These products are too expensive		29	32.22%
2	The kinds of products I want are not available locally		12	13.33%
3	The products I want are not available where I usually shop		8	8.89%
4	It is too hard to get to a store that sells these products		0	0.00%
5	I'm on a special diet		5	5.56%
6	Other (please describe) = high cost, freezer space, expense, vegetarian,		8	8.89%
7	Not sure		2	2.22%
8	Nothing limits my purchase of these products.		44	48.89%
	Total		108	100.00%

Would your household eat more meat, seafood, dairy or egg products if: (please select all that apply)



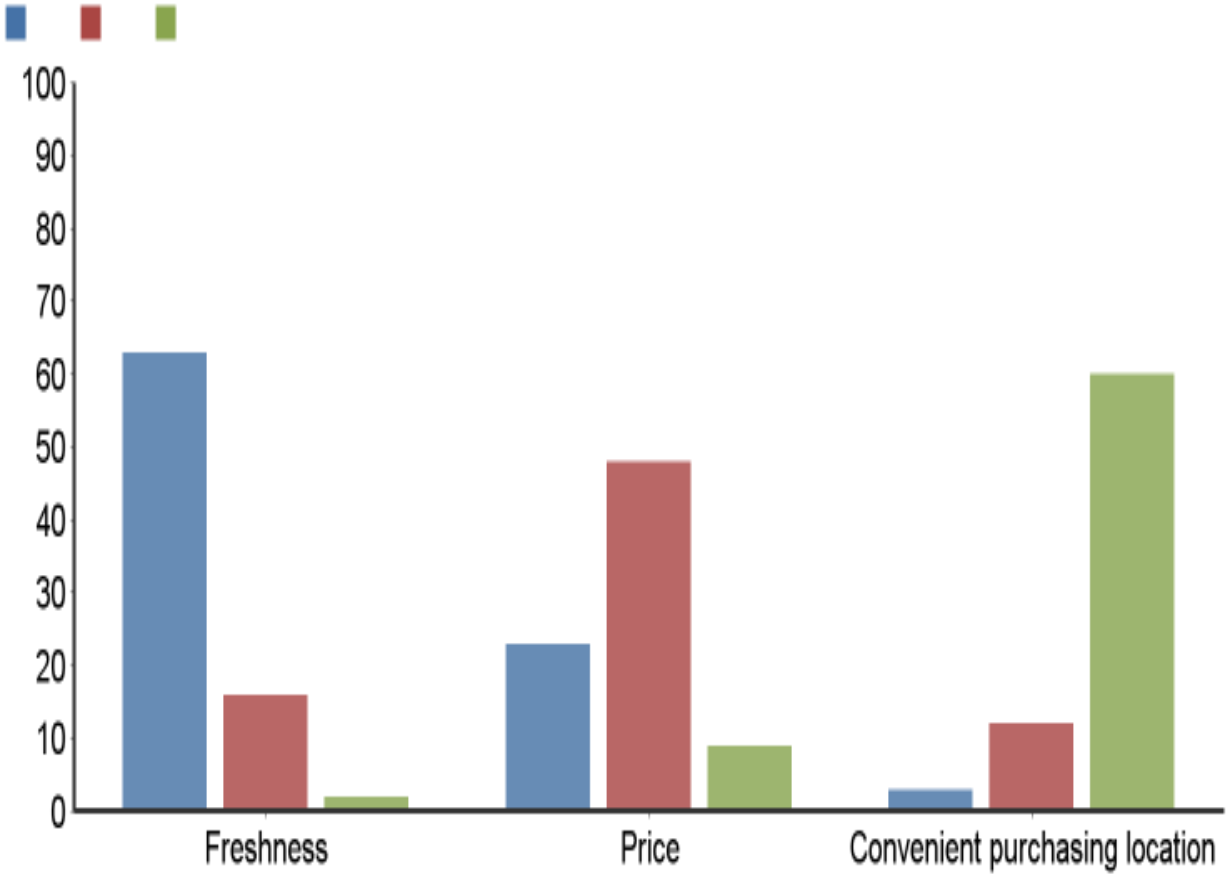
#	Answer	Bar	Response	%
1	there were closer or more convenient places to buy them		7	11.48%
2	they were less expensive		44	72.13%
3	the quality was better		25	40.98%
	Total		76	100.00%

Do you raise any animals at home for consumption?



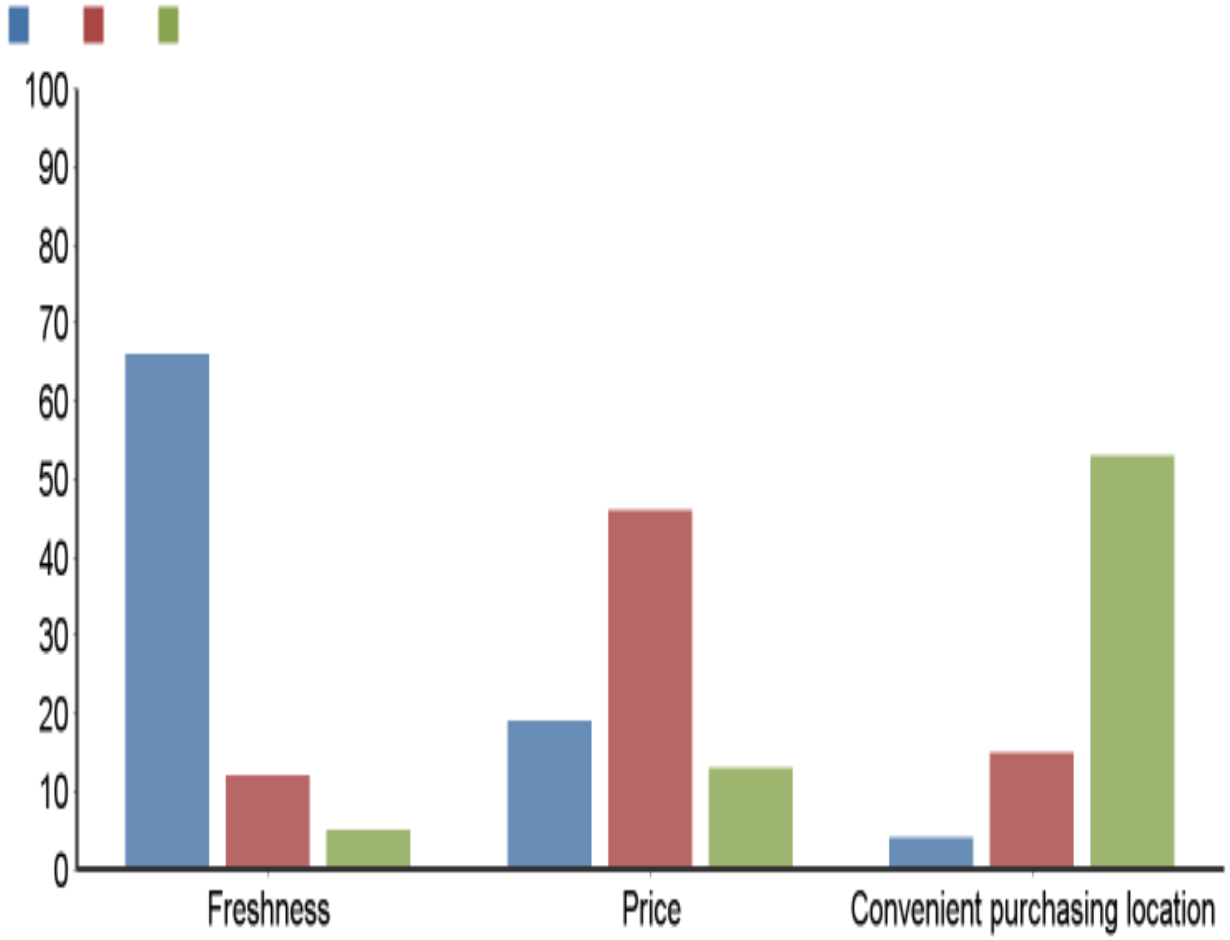
#	Answer	Bar	Response	%
1	Yes		2	2.17%
2	No		90	97.83%
	Total		92	100.00%

Please rank how important the following three things are when buying meat and seafood (with 1 being most important).



#	Answer	Rank1	Rank2	Rank3	Responses	Mean
1	Freshness	63	16	2	81	1.25
2	Price	23	48	9	80	1.83
3	Convenient purchasing location	3	12	60	75	2.76
	Total	89	76	71	-	-

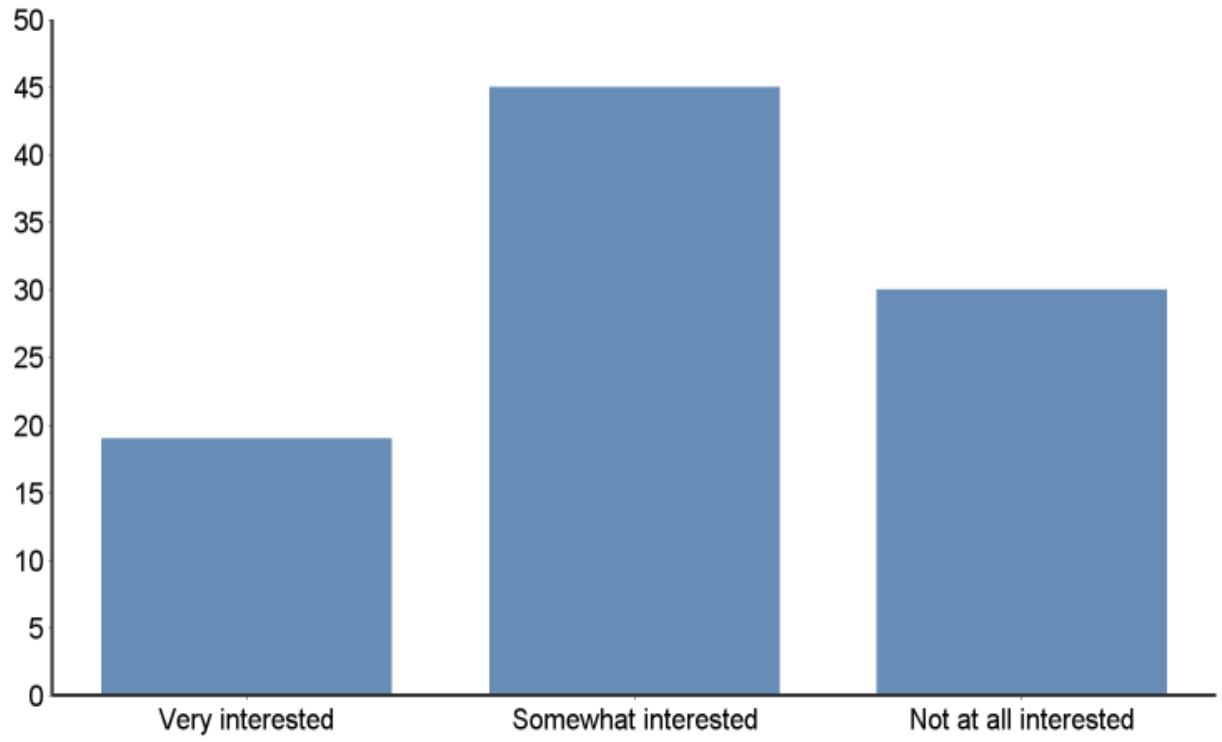
Which of these is the most important to you when buying dairy products and eggs?



#	Answer	Rank1	Rank2	Rank3	Responses	Mean
1	Freshness	66	12	5	83	1.27
2	Price	19	46	13	78	1.92
3	Convenient purchasing location	4	15	53	72	2.68
	Total	89	73	71	-	-

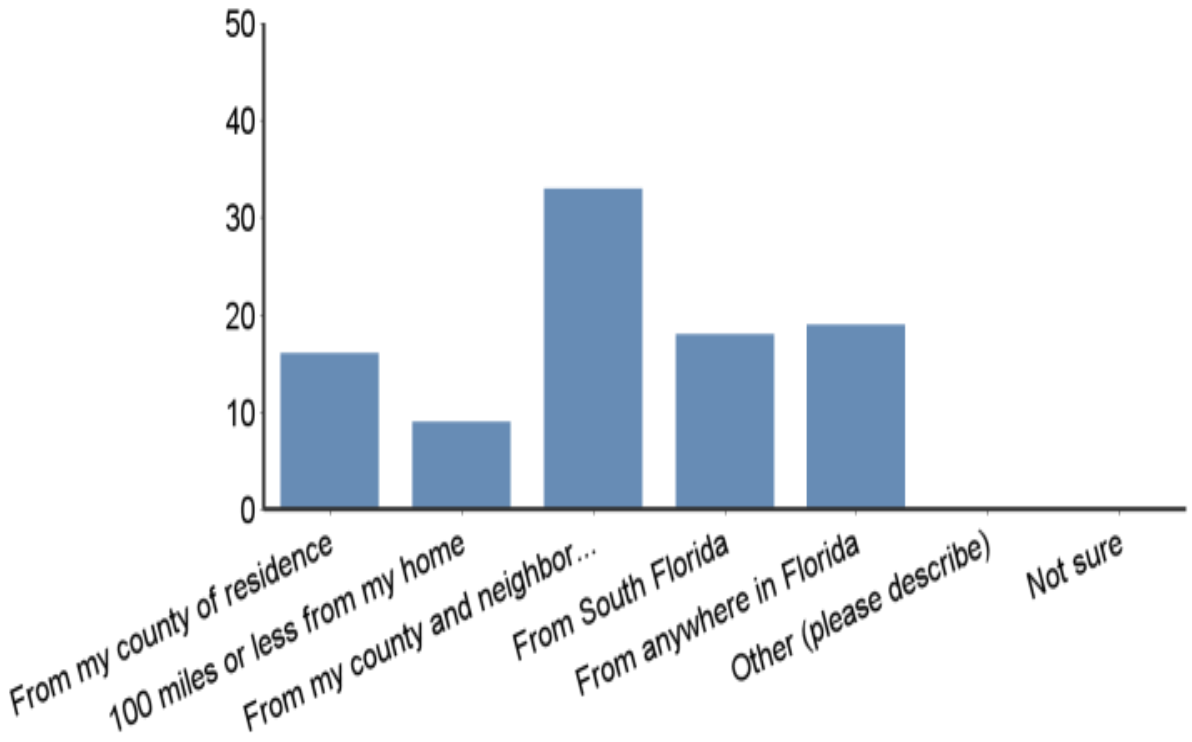
Now, we have a few general questions about food.

How interested would you be in reading short articles that describe the benefits of eating fresh fruits and vegetables and protein items like meat, seafood, dairy, and eggs?



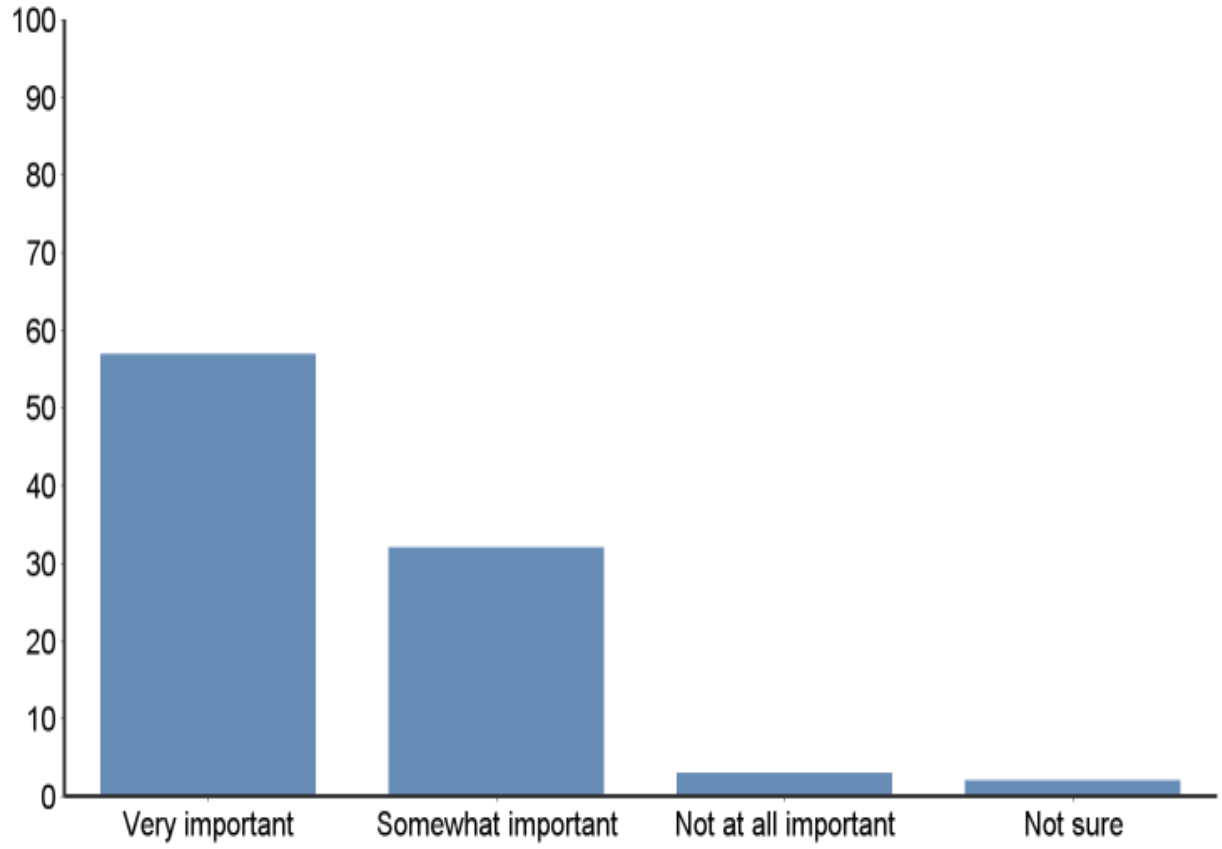
#	Answer	Bar	Response	%
1	Very interested		19	20.21%
2	Somewhat interested		45	47.87%
3	Not at all interested		30	31.91%
	Total		94	100.00%

"Local food" can be defined several ways. Which of the following best represents your definition of "local food"?



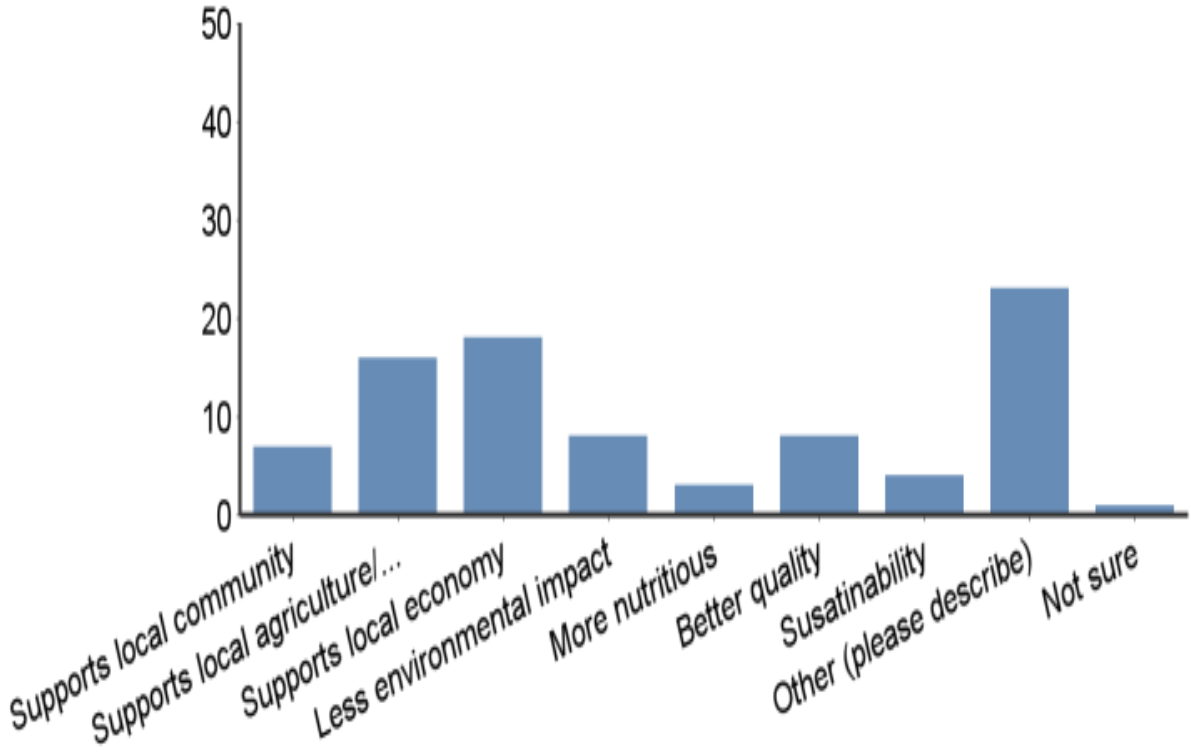
#	Answer	Bar	Response	%
1	From my county of residence		16	16.84%
2	100 miles or less from my home		9	9.47%
3	From my county and neighboring counties		33	34.74%
4	From South Florida		18	18.95%
5	From anywhere in Florida		19	20.00%
6	Other (please describe)		0	0.00%
7	Not sure		0	0.00%
	Total		95	100.00%

How important do you think it is to buy "local food"?



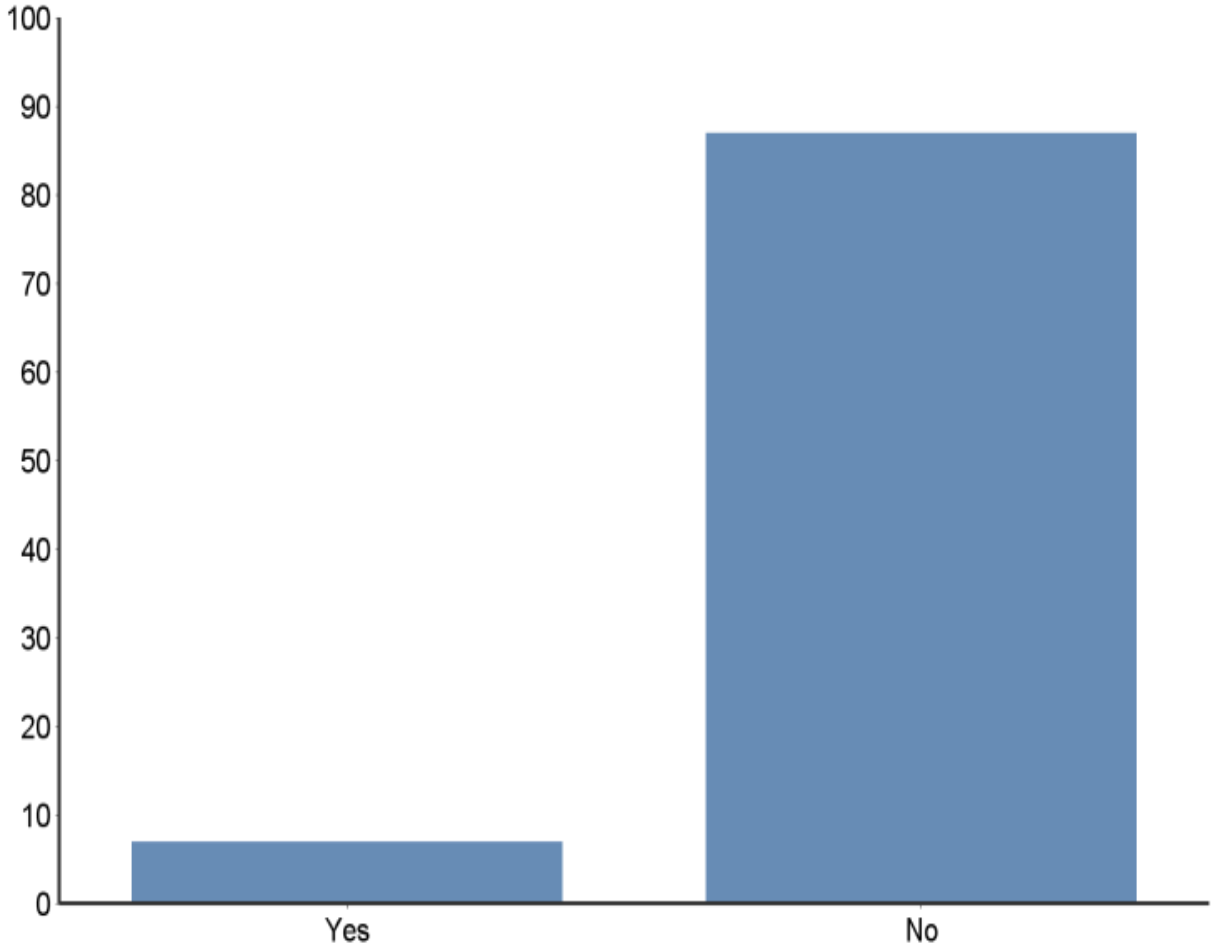
#	Answer	Bar	Response	%
1	Very important		57	60.64%
2	Somewhat important		32	34.04%
3	Not at all important		3	3.19%
4	Not sure		2	2.13%
	Total		94	100.00%

Why is that? (please select all that apply)



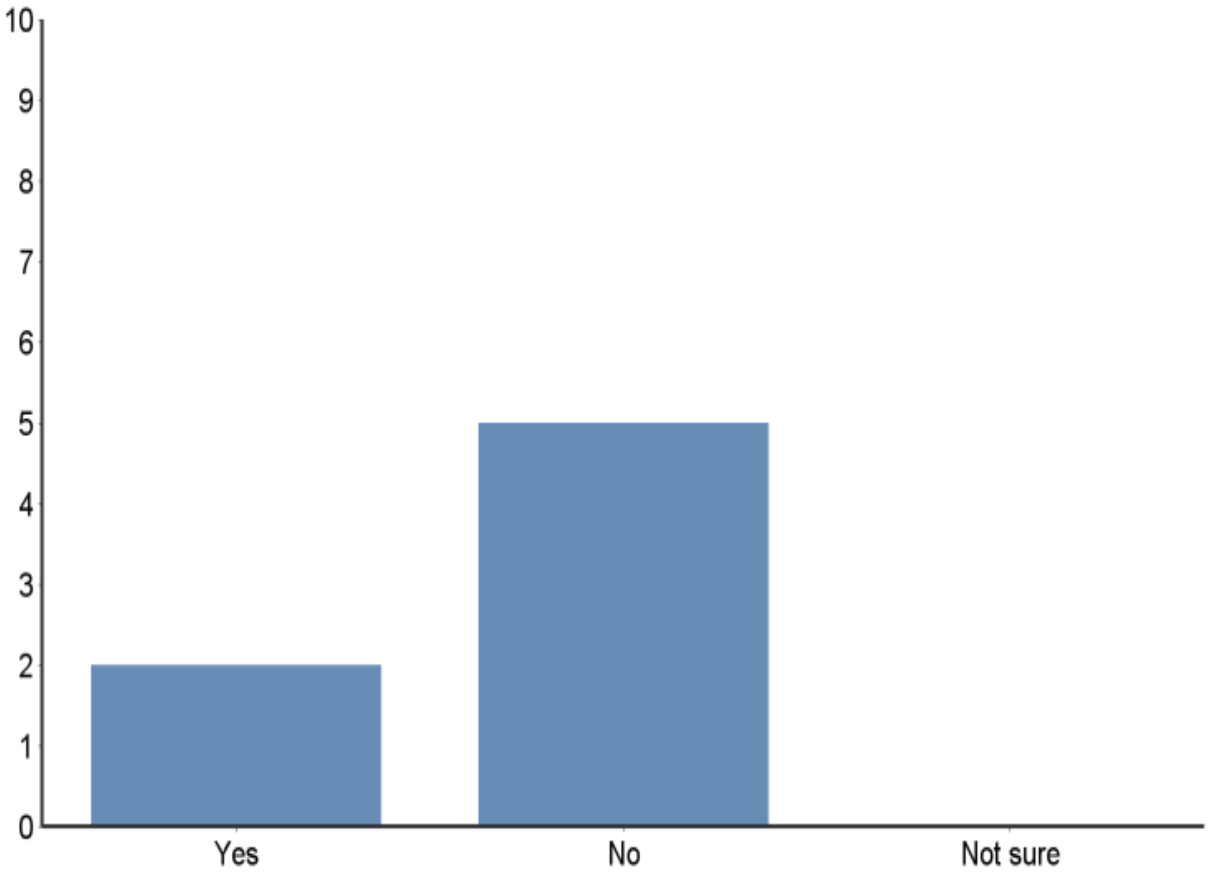
#	Answer	Bar	Response	%
1	Supports local community		7	7.95%
2	Supports local agriculture/farmers		16	18.18%
3	Supports local economy		18	20.45%
4	Less environmental impact		8	9.09%
5	More nutritious		3	3.41%
6	Better quality		8	9.09%
7	Susatinability		4	4.55%
8	Other (please describe) = all,		23	26.14%
9	Not sure		1	1.14%
	Total		88	100.00%

Do any school-age children live in your household?



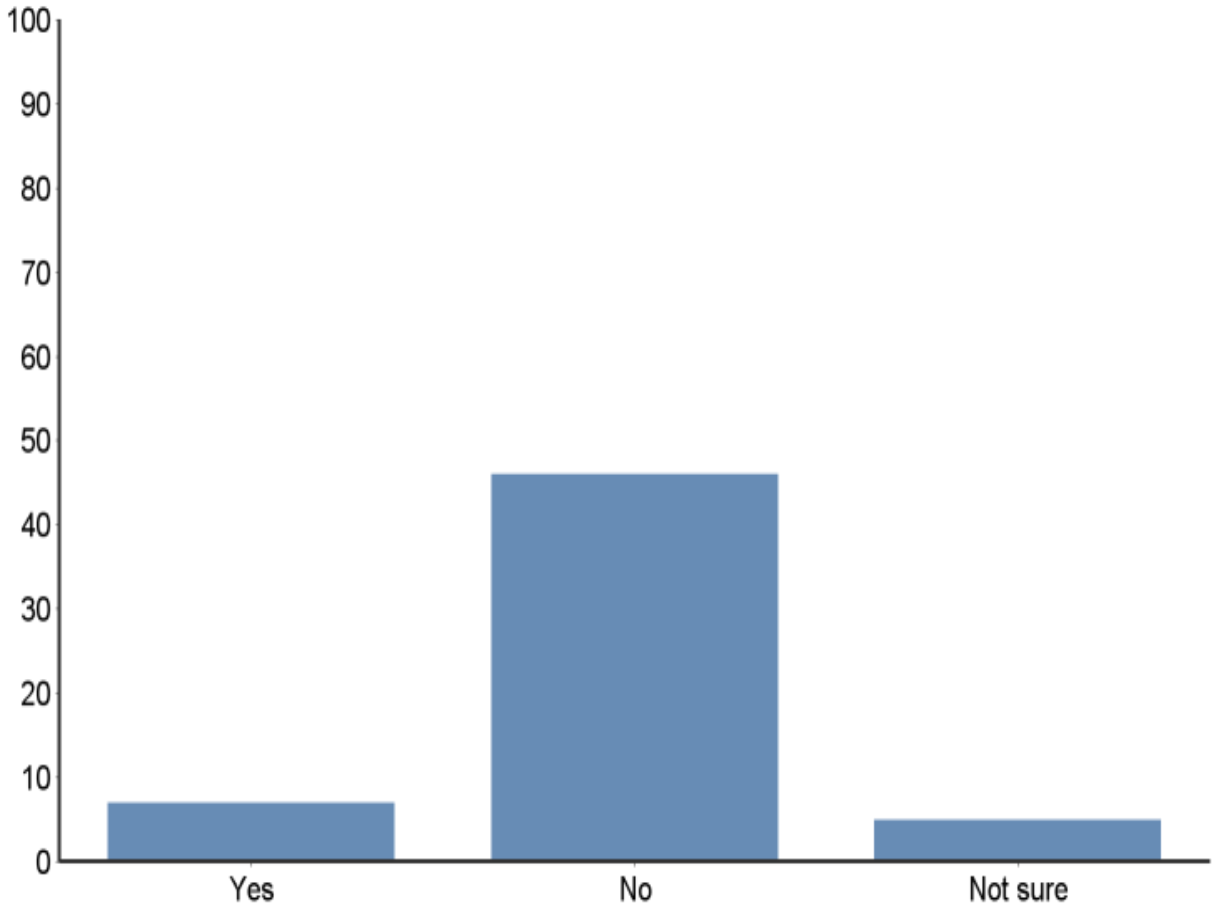
#	Answer	Bar	Response	%
1	Yes		7	7.45%
2	No		87	92.55%
	Total		94	100.00%

Do any of your children eat fresh fruits and vegetables through a school meal program?



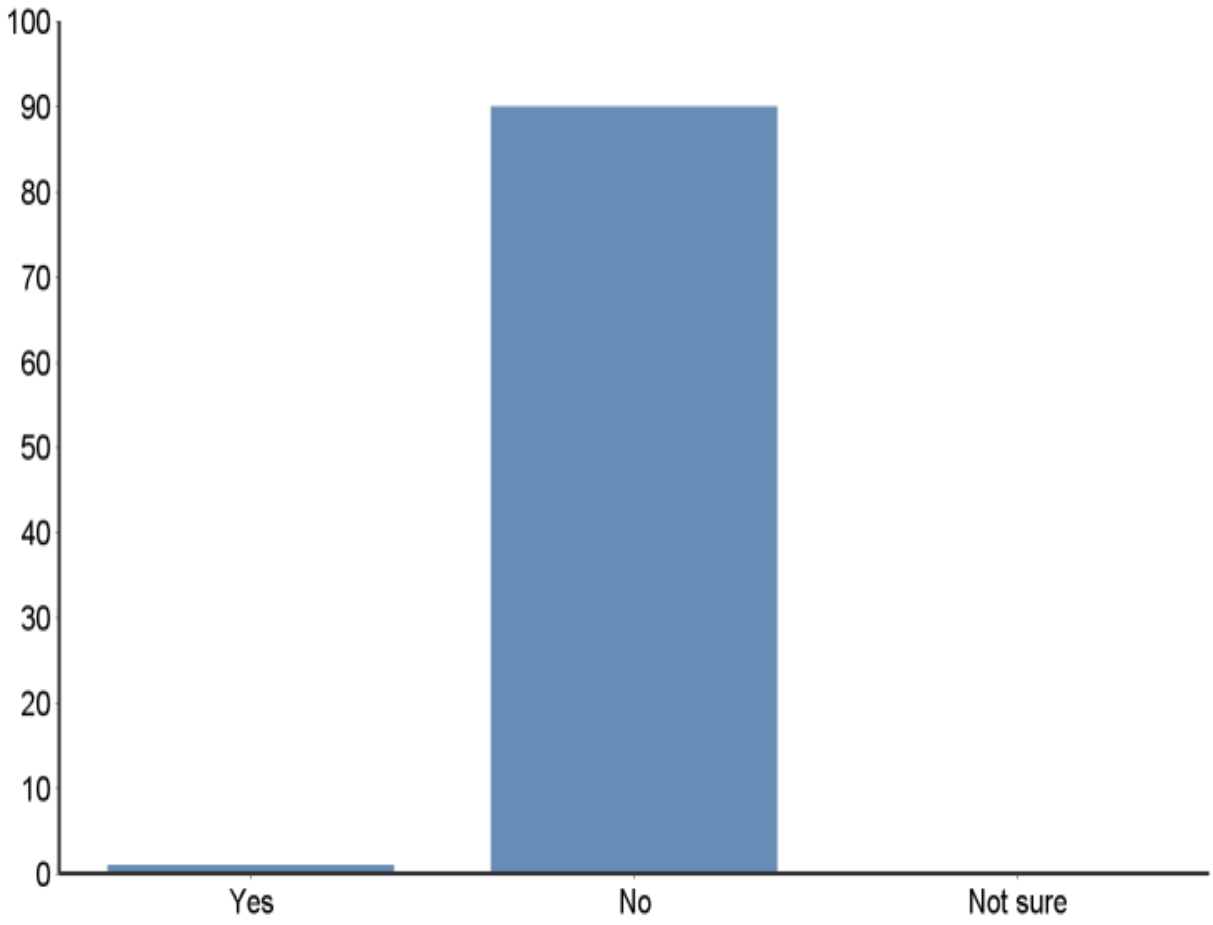
#	Answer	Bar	Response	%
1	Yes		2	28.57%
2	No		5	71.43%
3	Not sure		0	0.00%
	Total		7	100.00%

Do any of your children eat meat, seafood, dairy products or eggs through a school meal program?



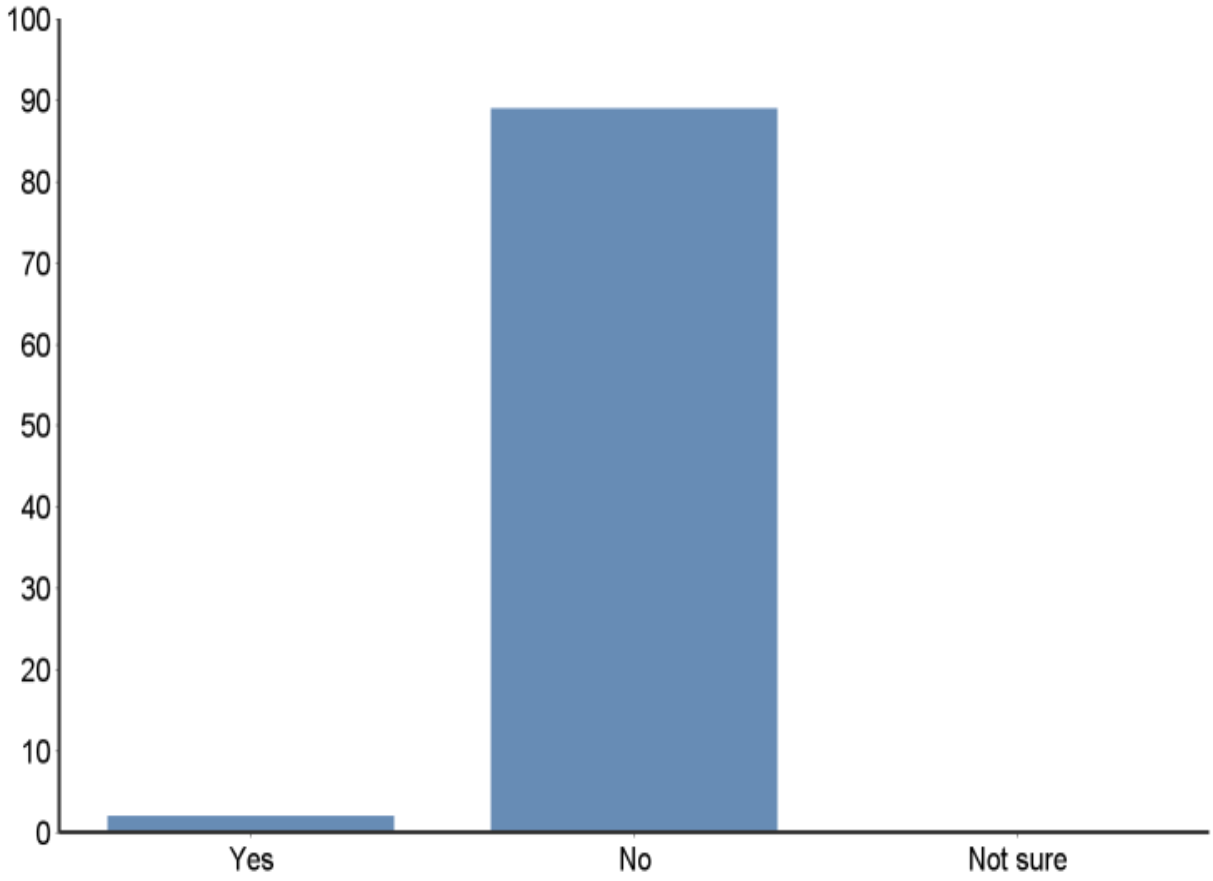
#	Answer	Bar	Response	%
1	Yes		7	12.07%
2	No		46	79.31%
3	Not sure		5	8.62%
	Total		58	100.00%

Does anyone in your household ever purchase food with SNAP or WIC benefits?



#	Answer	Bar	Response	%
1	Yes		1	1.10%
2	No		90	98.90%
3	Not sure		0	0.00%
	Total		91	100.00%

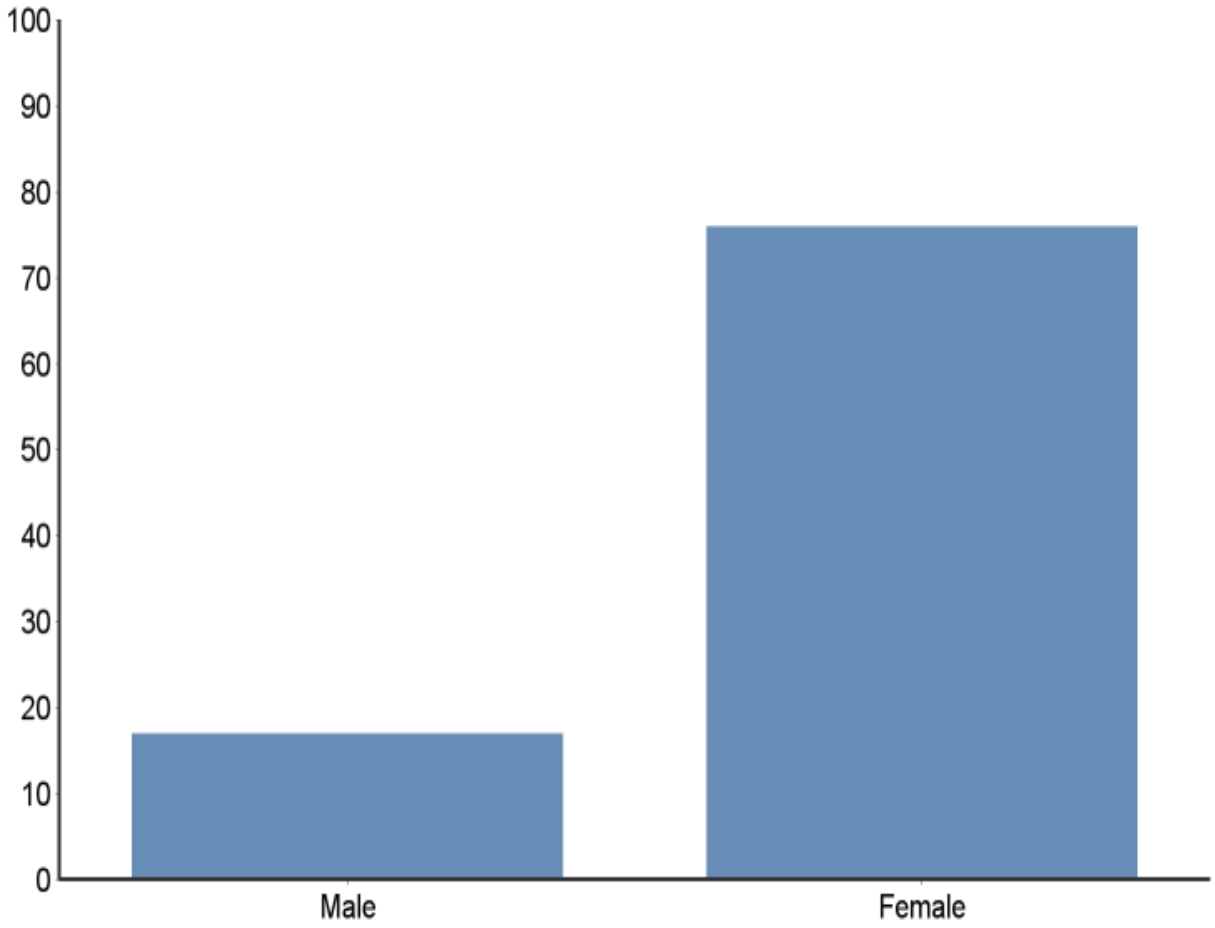
In the past 12 months, did your household ever get food assistance from a church, food pantry, or food bank?



#	Answer	Bar	Response	%
1	Yes		2	2.20%
2	No		89	97.80%
3	Not sure		0	0.00%
	Total		91	100.00%

Finally, we have just a few demographics questions to be sure we've talked to all kinds of people in Martin County.

What is your gender?



#	Answer	Bar	Response	%
1	Male		17	18.28%
2	Female		76	81.72%
	Total		93	100.00%

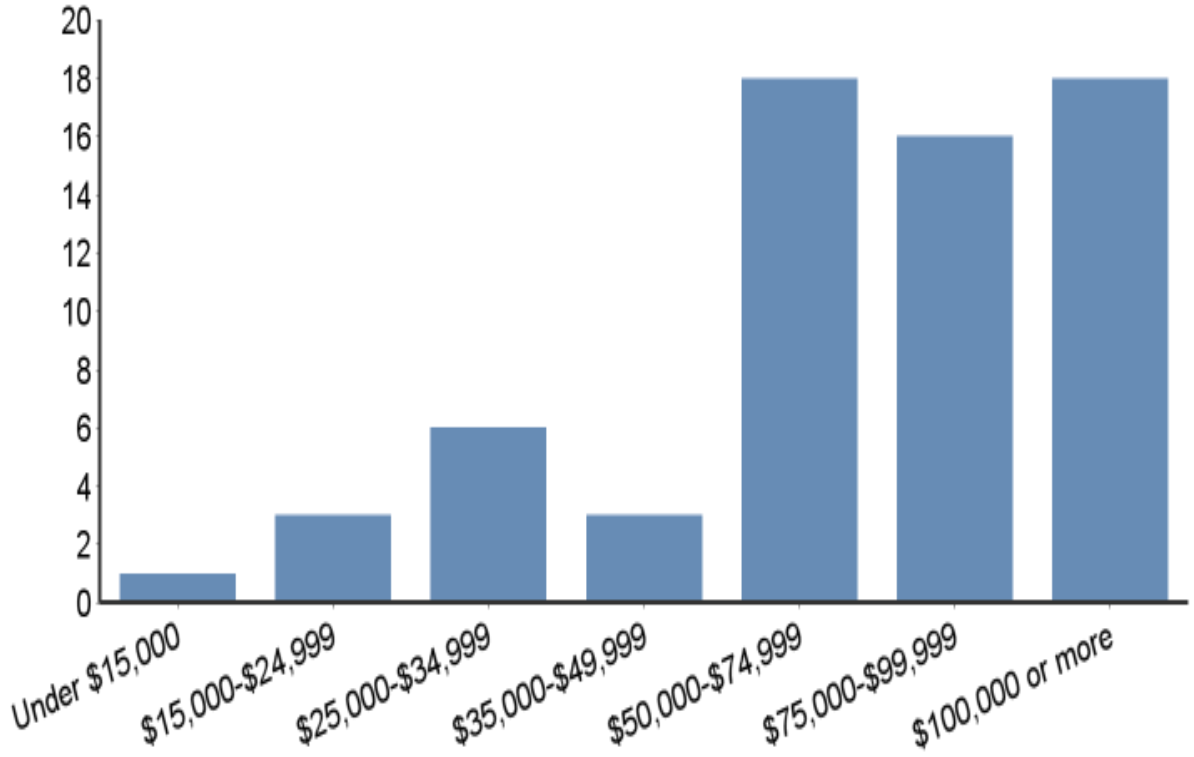
Including yourself, how many adults age 18 or older are in your household?

NUMBER OF ADULTS 18 OR OLDER IN HOUSEHOLD INCLUDING YOURSELF	NUMBER OF RESPONSES
1	23
2	69
3	6
4	1
5	0
6	0
7	0
8	0
9	0
10	1

And, how many children under age 18 are in your household?

NUMBER OF CHILDREN UNDER 18 IN HOUSEHOLD	NUMBER OF RESPONSES
0	91
1	5
2	2
3	1

Just for statistical purposes, can you tell me your household's total yearly income before taxes?

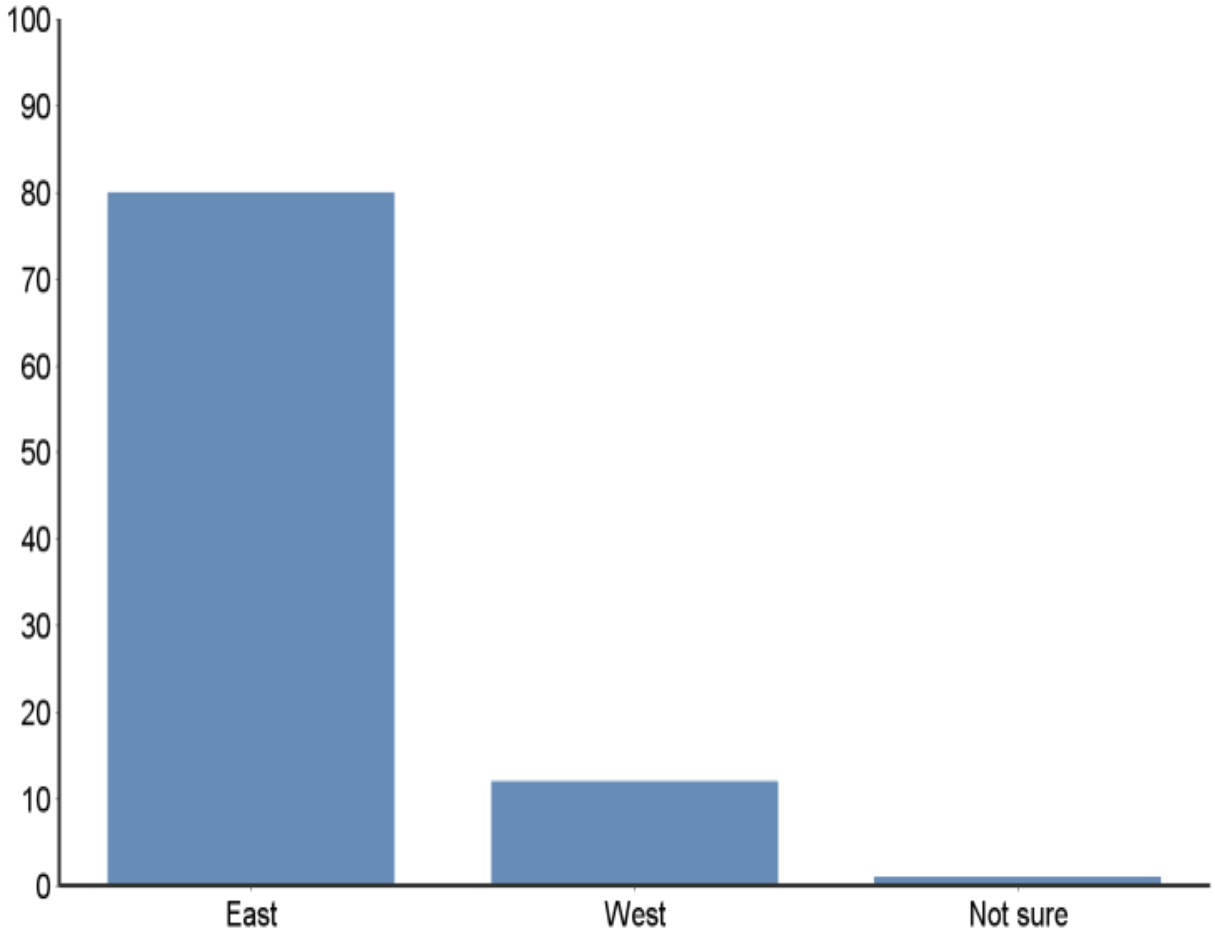


#	Answer	Bar	Response	%
1	Under $15,000		1	1.54%
2	$15,000-$24,999		3	4.62%
3	$25,000-$34,999		6	9.23%
4	$35,000-$49,999		3	4.62%
5	$50,000-$74,999		18	27.69%
6	$75,000-$99,999		16	24.62%
7	$100,000 or more		18	27.69%
	Total		65	100.00%

What is your 5-digit zip code?

ZIP CODE	NUMBER OF RESPONSES
33455	10
33469	1
34952	1
34956	1
34957	12
34990	14
34994	15
34996	13
34997	28

Do you live east or west of I-95?

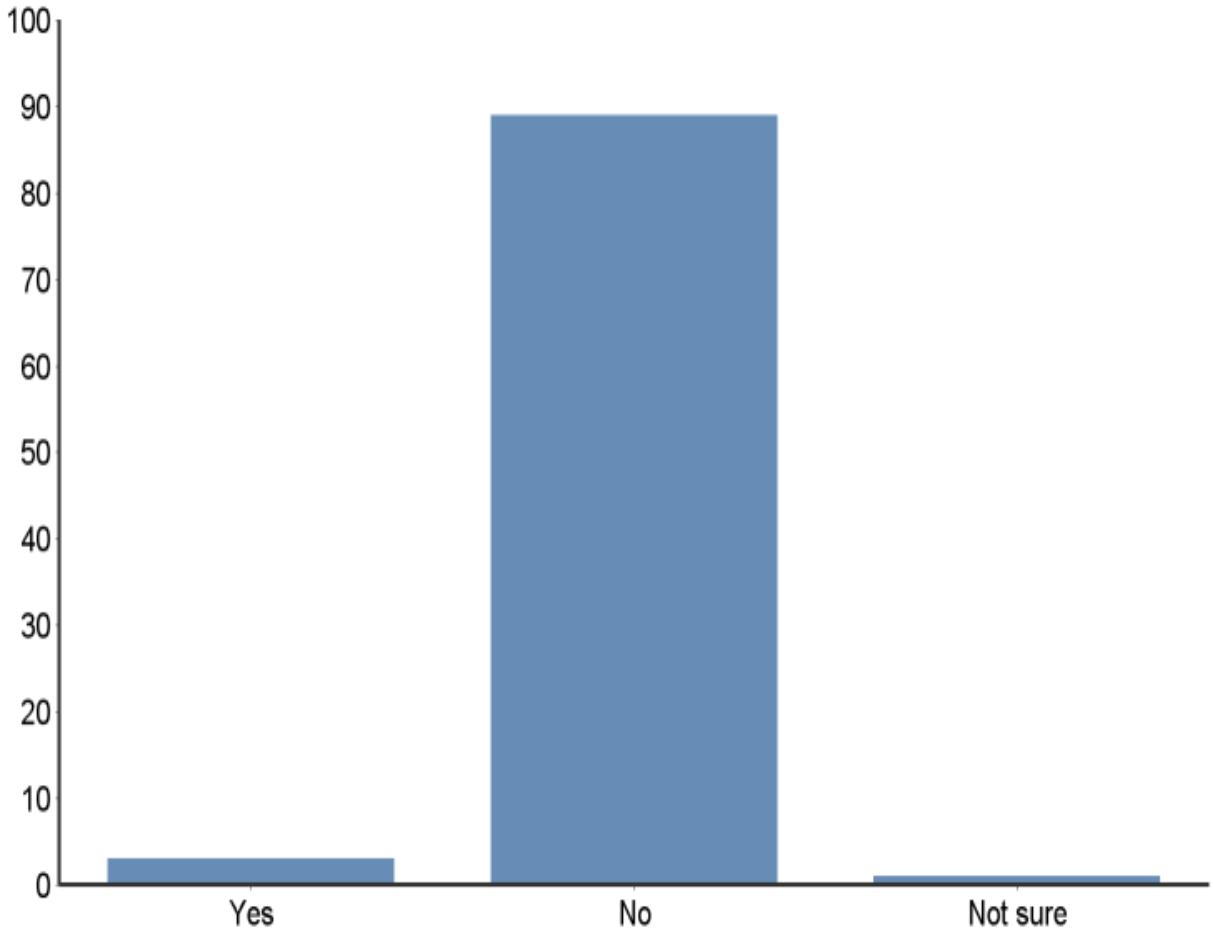


#	Answer	Bar	Response	%
1	East		80	86.02%
2	West		12	12.90%
3	Not sure		1	1.08%
	Total		93	100.00%

What neighborhood is that?

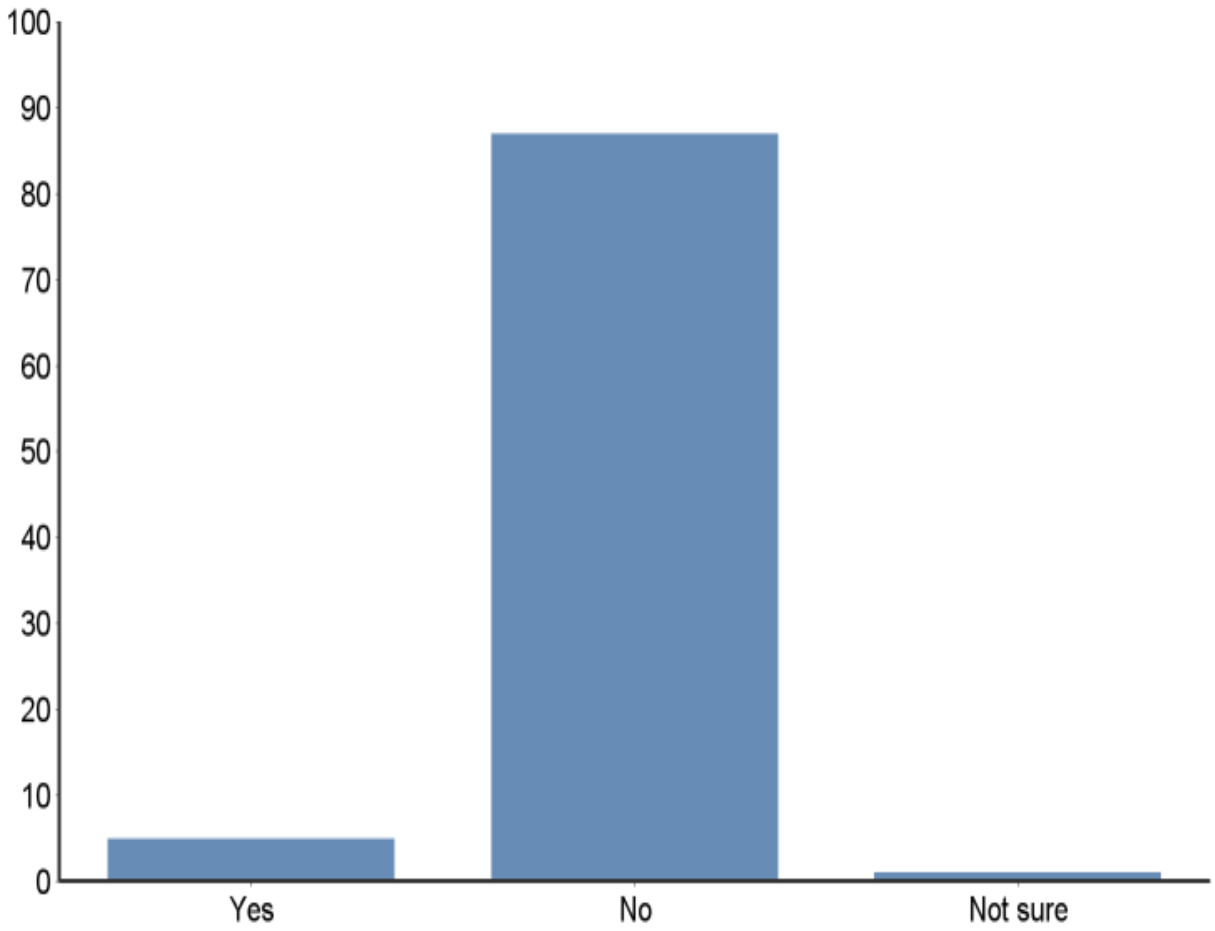
NEIGHBORHOOD	NUMBER OF RESPONSES		NEIGHBORHOOD	NUMBER OF RESPONSES
Beau Rivage	1		Palm Lake Park	1
Bessey Creek	2		Pipers	1
Cambridge	1		Port Salerno	1
Canoe Creek	1		Rio	1
Cedar Pointe	1		Rocky Point	2
East Oceam	1		Rustic Acres	1
Golden Gate	2		Salerno	1
Hobe Hills	1		Sewall's Point	4
Hobe Sound	4		South Fork	1
Jensen Beach	6		South Fork Estates	1
Jensen Beach - Skyline Heights	1		South Stuart	1
Jensen Beach Golf & CC at Eagle Marsh	1		Southwood	1
Jensen Highlands	1		Stuart	8
Kingswood	1		Cove Road, Stuart	1
Lake Tuscany/Tropical Farms	1		Downtown Stuart	1
Leilani Heights, Jensen Beach	1		Summerfield	1
Mariner Village	1		Tequesta	1
martin county	1		The Preserve of Hobe Sound	1
North River Shores	3		Tropical Farms	1
North Stuart	1		Tropical Farms - Lake Tuscany	1
not sure	1		Vista Pines	1
off Locks Road	1		Woodridge	1
Old Palm City	2			
Palm City	5			
Palm City Farms	2			
Palm City Road	1			

Do you own a farm or other agricultural-based business?



#	Answer	Bar	Response	%
1	Yes		3	3.23%
2	No		89	95.70%
3	Not sure		1	1.08%
	Total		93	100.00%

Do you work for a farm or other agricultural-based business?



#	Answer	Bar	Response	%
1	Yes		5	5.38%
2	No		87	93.55%
3	Not sure		1	1.08%
	Total		93	100.00%

APPENDIX 5

MARTIN COUNTY
FOOD SYSTEM FEASIBILITY STUDY

ONLINE Responses to Supply Side/Farmer and Agribusiness Survey

		Q1	Q1_3_ TEXT	Q2	Q2_3_ TEXT	Q3	Q4
Completion Date	Progress (%)	Are you the: (Selected Choice)	Are you the: Other (please describe) - Text	Is this farm/ranch: (Selected Choice)	Is this farm/ranch - Other (please describe) - Text	How many acres did you farm last year?	How many workers did you employ last year, at the peak?
9/29/2017	100	Farm/Ranch owner		Family run		120	12
9/29/2017	100	Farm/Ranch owner		Family run		300	10
10/19/2017	100	Farm/Ranch owner		Family run			
10/19/2017	100	Other (please describe)	Nursery	Family run		1/2 acre	none
10/20/2017	100	Farm/Ranch owner		Family run		28	0
10/20/2017	100	Farm/Ranch owner		Family run		0	0
10/20/2017	100	Farm/Ranch owner		Family run		10	1
10/21/2017	100	Farm/Ranch owner		Family run		varies. we provide pollination, not growers. producers though. produced on 10-15 acres locally, about the same out of state	0

Q5	Q6_1	Q6_2	Q7_1	Q7_2
Were your annual gross sales last year:	What percentage of your sales would you estimate are wholesale versus retail? - Wholesale	What percentage of your sales would you estimate are wholesale versus retail? - Retail	Where do you currently sell your products (and what percent of your sales do they make up)? - To local wholesalers	Where do you currently sell your products (and what percent of your sales do they make up)? - To large food distributors
$50,000 - $199,999	80	20	40	40
$50,000 - $199,999	75	25	70	5
$50,000 - $199,999				
Less than $50,000	25	75		
$50,000 - $199,999		100%		
$500,000 or more	0	0	0	0
Less than $50,000		100		
$50,000 - $199,999	80	20	40	

Q7_3	Q7_4	Q7_5	Q7_6	Q7_7
Where do you currently sell your products (and what percent of your sales do they make up)? - Direct to retail chain stores	Where do you currently sell your products (and what percent of your sales do they make up)? - Direct to smaller, local grocery stores or markets	Where do you currently sell your products (and what percent of your sales do they make up)? - In local farmers markets?	Where do you currently sell your products (and what percent of your sales do they make up)? - Roadside stand	Where do you currently sell your products (and what percent of your sales do they make up)? - U-pick
		10	5	
		5	10	
	20	75		
		98%		
0	0	0	0	0
15	40			

Q7_8	Q7_9	Q7_10	Q7_11	Q7_12
Where do you currently sell your products (and what percent of your sales do they make up)? - Community Supported Agriculture (CSA)	Where do you currently sell your products (and what percent of your sales do they make up)? - Restaurants	Where do you currently sell your products (and what percent of your sales do they make up)? - School system	Where do you currently sell your products (and what percent of your sales do they make up)? - Hospitals	Where do you currently sell your products (and what percent of your sales do they make up)? - Prisons
5				
2				
0	0	0	0	0
	5			

Q7_13	Q8	Q9	Q9_2_ TEXT	Q10	Q11
Where do you currently sell your products (and what percent of your sales do they make up)? - Other	Do you ever provide or sell your products to food banks?	Do you presently sell or market your products as "local"? - Selected Choice	Do you presently sell or market your products as "local"? - Yes, some of my products (please approximate percent in the box) - Text	Why or why not?	Do you sell outside the local area?
	Yes	Yes, all of my products		Hopefully it will generate a price premium	Yes
	Yes	Yes, some of my products (please approximate percent in the box)	75		Yes
	Yes	Yes, all of my products			Yes
3	No	Yes, all of my products		part of mission statement	No
2%	No	Yes, all of my products			No
0	Yes	No			No
100	No	No			No
	No	Yes, some of my products (please approximate percent in the box)	90		Yes

Q12	Q13	Q14	Q14a
What are the 10 most important commodities you produce (list up to 10).	Which of the following post-harvest practices, if any, do you presently use?	Do you have a need for another selling avenue that a food hub could provide?	Have you ever thought about the potential benefits of using or working with a food hub if one was to be available in or close to Martin County?
tomatoes peppers cukes cabbage	Produce placed in a coller after harvest	Maybe	Not very much
tomatoes potatoes	Produce placed in a coller after harvest	maybe	a little
	Other (e.g. washing, waxing, cleaning, fileting, grading, etc.)		
Fresh greens, herbs. Specialty plants. jarred manufactured food.		yes	yes
milk, kefir, yogurt, soft and hard cheeses, soap		yes	yes
	Produce placed in a coller after harvest	yes	yes
Beef			
Honey and other Bee products. always looking to expand into other produced food but need place to do so.	Other (e.g. washing, waxing, cleaning, fileting, grading, etc.)	yes	yes all the time

Q14b	Q15	Q16	Q17	Q18
Might there be services that a food hub could provide that would be beneficial to you, such as helping to comply with state and federal food processing regulations, etc.?	Would you be interested in a local facility that would allow you to refrigerate, further process, and/or package your products?	How far would you be willing to travel to bring your products to such a facility, or how long would you be willing to drive?	What products might you bring to such a facility?	Why not?
Could be	Somewhat interested	They would have to come to my farm to pick up as I don't have any transportation capability	all	
possibly	Somewhat interested	5 mi	all	
	Very interested			
yes	Very interested	12 to 15 miles	produce, microgreens, greens, herbs	
yes	Very interested	50 miles	meat, product to make cheese	
yes	Very interested	20 miles	vegetable and fruit	
yes, it would provide a more diverse amount of equipment and marketing to more producers and a place for people to shop	Very interested	30-45 minutes	Honeys, Fermented Products	

Q19	Q20	Q21	Q22
Might you be interested in selling your products to a local wholesale distributor who is targeting its sales efforts to provide improved food access to underserved communities?	What products might you be interested in selling to this wholesale distributor?	Why not?	Do you think either the processing facility or the wholesale distribution system I have just mentioned would allow you to expand your farm operation and/or hire additional labor/more workers?
Somewhat interested	all		Yes
Somewhat interested	all		Yes
			Yes
Somewhat interested	our product line of microgreens and hermetically sealed jarred food		Yes
Not sure			Yes
Very interested	vegetables and tropical fruit		Yes
Very interested	Honeys. Fermented Products		Yes

Q23	Q24	Q25	Q26
Why not?	Do your production seasons for your commodities concur with the list that is published by the Florida Department of Agriculture and Consumer Services (FDACS)?	Would you be interested in participating in a new farm incubator program?	Why not?
	basically	Somewhat interested	
	yes	Somewhat interested	
		Very interested	
	yes	Not sure	
		Not sure	
	don't know	Very interested	
	not sure have not seen the list	Somewhat interested	