YORK COUNTY INSTITUTIONS SURVEY SUMMARY

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Introduction

This summary is a portion of a larger joint effort between the York County Farmers Network (YCFN) and the Southern Maine Planning and Development Commission (SMPDC) to utilize a USDA Local Food Promotion Program grant to investigate the possibility of establishing a food hub in York County, Maine. The first step in investigating this possibility was surveying the farmers and producers in York and southern Oxford Counties. The next step was surveying the buyers and potential buyers of the farmers' produce and products. The buyers were categorized as either institutional, grocery or restaurants. Each of these categories has specific requirements when buying food so surveys were developed to target those individual market segments.

Survey Background

This particular summary reports on the results from the institutional buyers' survey. The outreach effort was not all-inclusive – rather, selected segments of the institutional market were solicited: schools, hospitals and long-term care/assisted living providers. Survey results represent about 29% of the institutions solicited. Twenty-one institutions were selected for the survey and six responded, with some representing more than one physical location, as in the case of school districts. Each target segment of the institutional market is represented by at least one respondent. The results obtained from all the buyers' surveys will be important to the process of evaluating the feasibility of a food hub in York County.

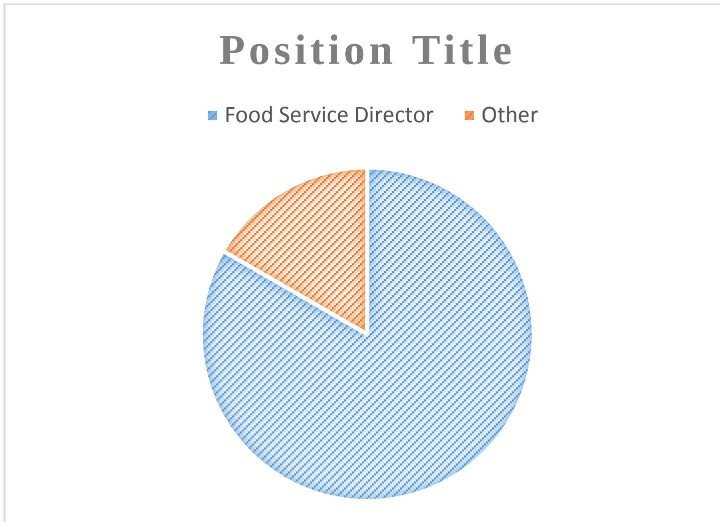
Analysis of Survey Responses

There were 30 questions in the survey "*York County Food Hub Feasibility Study – Survey for Institutional Buyers*" which SMPDC has developed graphics and provided explanation for. With three exceptions (those questions asking for identity information which remains confidential), all survey questions are represented through the sections below – in some cases, more than one survey question comprises a section.

Institutional Buyers Survey Summary

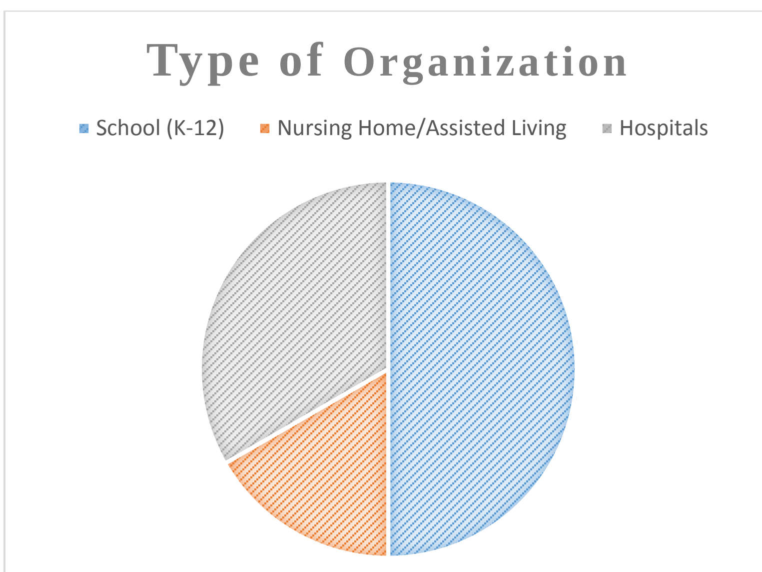
Section 1

Most respondents indicated that their position title is Food Service Director while one respondent holds the title of Registered Dietitian.



Section 2

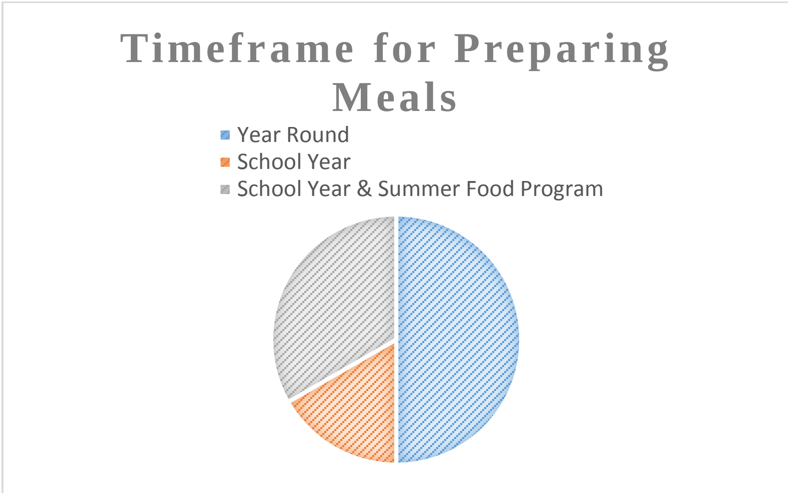
Half of the respondents represented K-12 Schools, one worked for Nursing Homes/Assisted Living Facilities and two indicated that they represented hospitals.



The respondents who represented schools worked for school districts and were responsible for food purchases for at least three or more individual schools. One hospital respondent represented both campuses of the hospital.

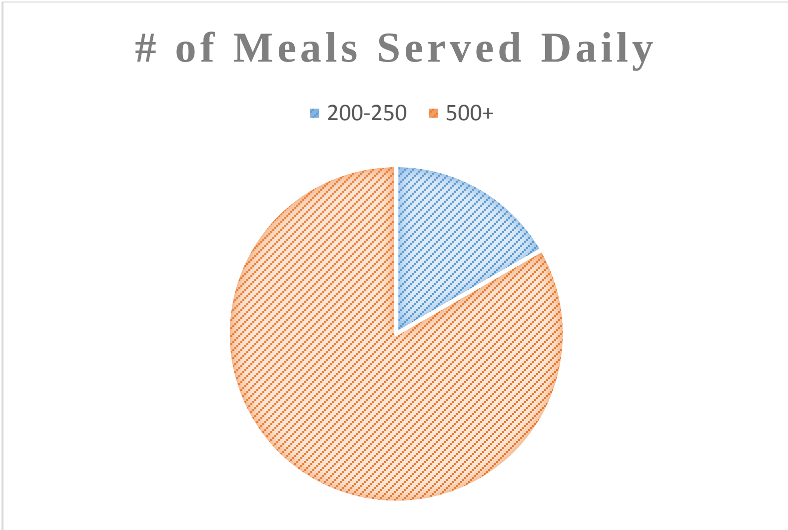
Section 3

Half of respondents indicated that they were preparing meals year round, one respondent indicated that they were preparing meals during the school year only and two indicated that they were preparing meals during the school year plus running a summer meal program at several locations.



Section 4

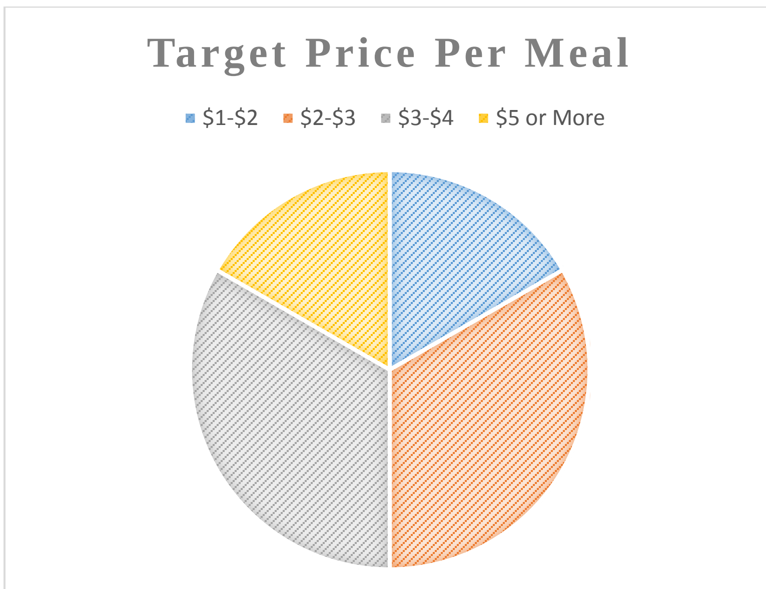
Most institutions indicated that they serve 500+ meals per day while one institution indicated that they serve between 200 and 250 meals daily.



Grouping the responding institutions by category, hospitals have a target meal price of between $2 and $5, the long-term care facility has a target meal price of $5 or more, and schools have a target meal price of between $1 and $4.

The breakdown for each target meal price range was:

- One respondent indicated that their target price per meal is between $1 and $2
- Two respondents indicated that their price per meal is between $2 and $3
- Two more respondents indicated that their price per meals is between $3 and $4
- One respondent indicated that their price per meal is $5 or more.



Section 5

All respondents indicated that their ability to store fresh fruits and vegetables, ability to store fresh meat, poultry, eggs and seafood, food handling safety and their ability or capacity to prepare and process fresh vegetables and fruit is good.

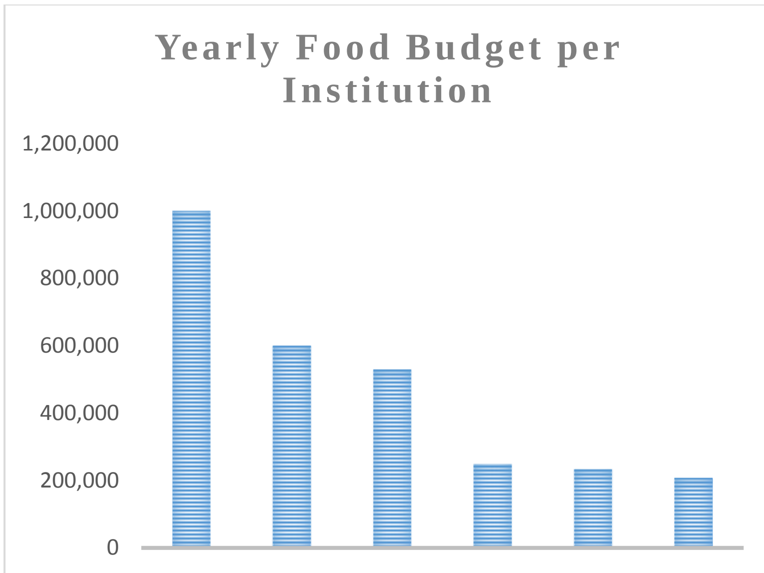
The two areas that at least one respondent rated as poor were the ability to receive fresh meat, poultry, eggs and seafood and the ability or capacity to prepare and process fresh meat, poultry, eggs and seafood.

Institutional Rating on Ability to Receive, Prepare and Process Fresh Foods

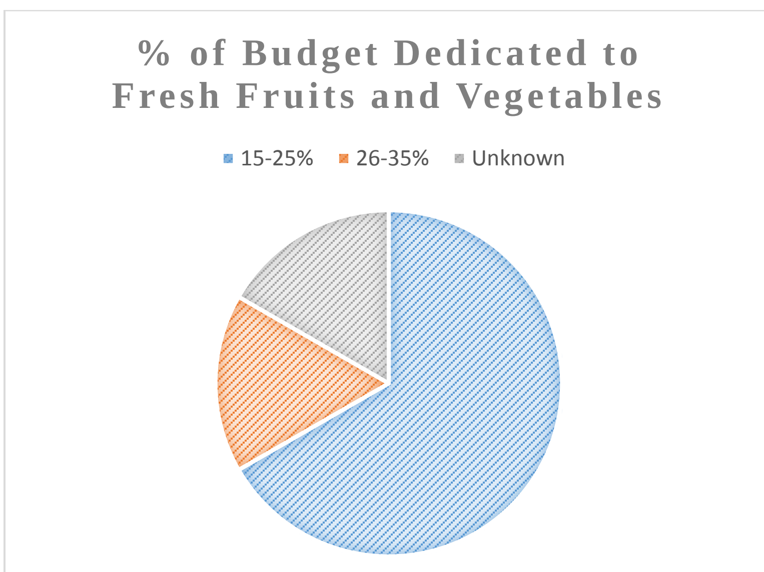
	Good	*Average*	*Poor*
Ability to Receive Fresh Fruits & Vegetables	83.33%	16.67%	
Ability to Store Fresh Fruits and Vegetables	100%		
Ability to Receive Fresh Meat, Poultry, Eggs and Seafood	50%	33.33%	16.67%
Ability to Store Fresh Meat, Poultry, Eggs and Seafood	100%		
Cooking/Culinary Skills	83.33%	16.67%	
Safe Food Handling Skills	100%		
Ability or Capacity to Prepare and Process Fresh Vegetables and Fruit	100%		
Ability or Capacity to Prepare and Process Fresh Meat, Poultry, Eggs and Seafood	50%	33.33%	16.67%

Section 6

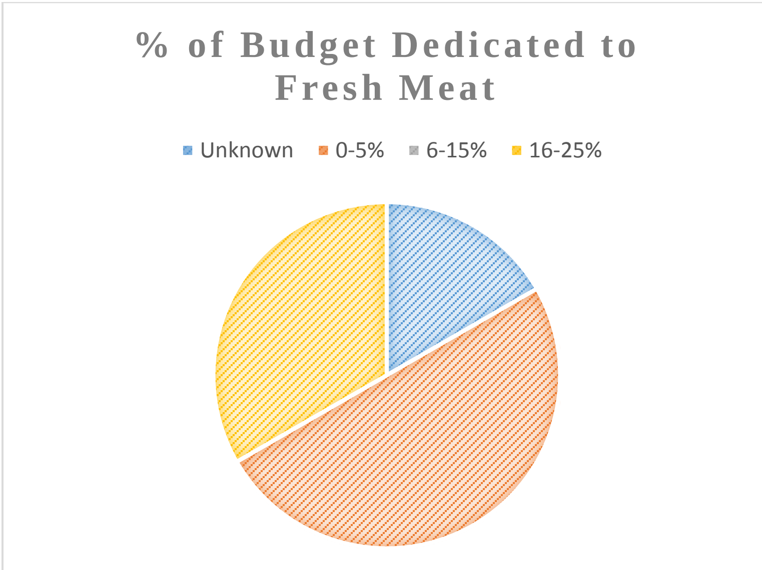
The responses to this question were split with half of responding institutions reporting that their yearly food budget is greater than $530,000 and the other half reporting that their yearly food budget is less than $250,000.



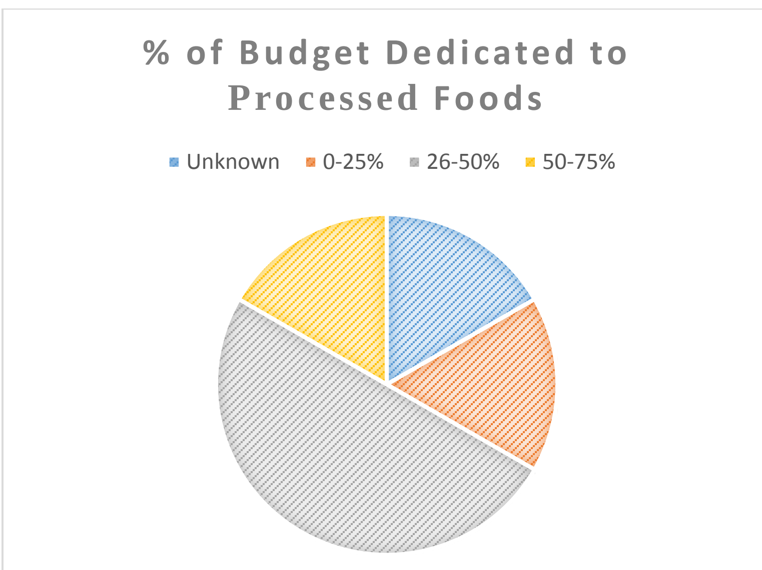
A majority of respondents indicated that 15-25% of their food budget is dedicated to fresh fruits and vegetables.



Half of respondents indicated that 0-5% of their food budget is dedicated to fresh meat. The other half indicated that 6-25% of their food budget is dedicated to fresh meat. This data correlates with the previous section where half of respondents reported that they had only average or poor ability to receive fresh meat, poultry or fish.

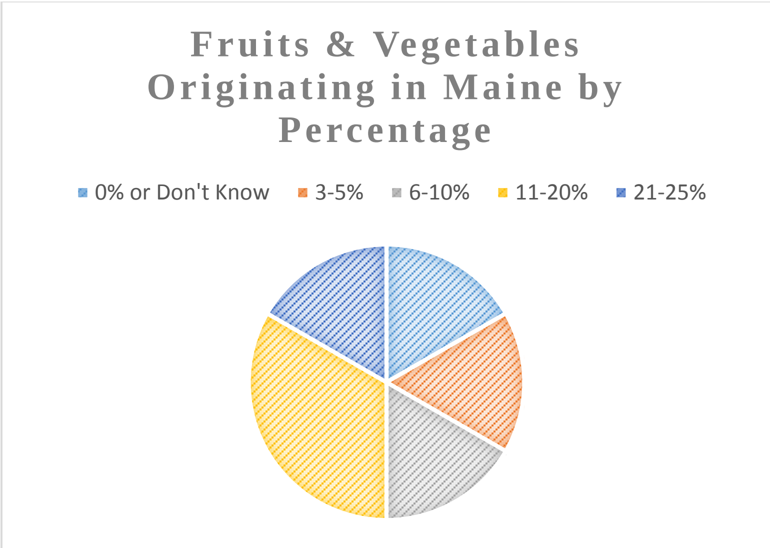


Half of the respondents indicated that 26-50% of their budget is dedicated to processed foods. Processed foods include frozen or canned foods as well as foods like butternut squash that have been peeled and cut. However, some foods in this category are likely highly processed, such as frozen french fries, where the food is basically fully prepared and needing only to be reheated.

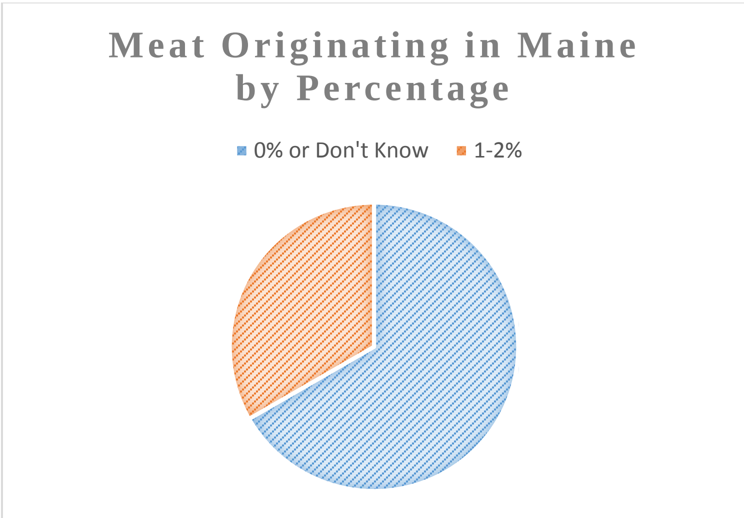


Section 7

One institution respondent indicated that they did not know or that none of their food purchases of fruits and vegetables originate in Maine. Another respondent indicated that 3-5% of their food purchases of fruits and vegetables originate in Maine, while a third indicated that 6-10% of their food purchases of fruits and vegetables originate in Maine. Two of institutions indicated that 11-20% of their total food purchases of fruits and vegetables originate in Maine and the final respondent indicated that 21-25% of their food purchases of fruits and vegetables originates in Maine.

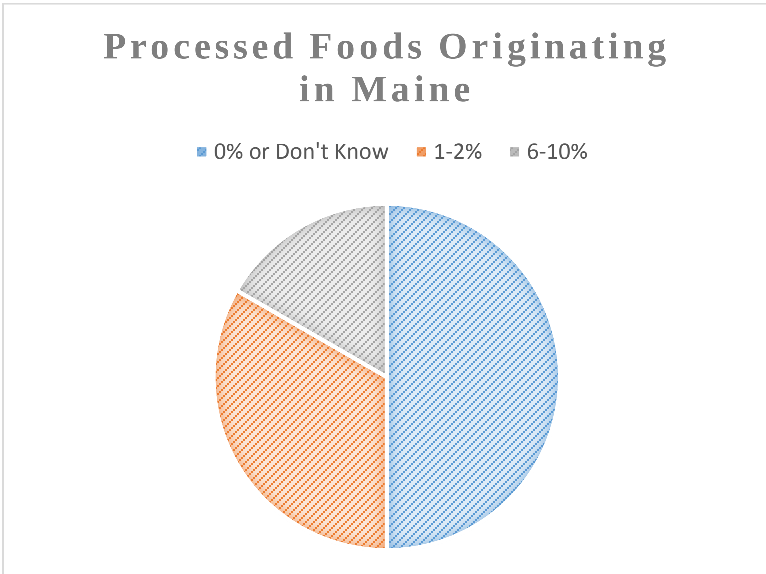


Most respondents indicated that they didn't know or that none of their total meat purchases originated in Maine. The remaining two respondents indicated that 1-2% of their total food purchases of meat originate in Maine.



All respondents indicated that none of their egg purchases originate in Maine or that they did not know if any originated in Maine.

Half of the institutions responding indicated that none of their processed food purchases originate in Maine or that they do not know the percentage. Two respondents indicated that 1-2% of their food purchases of processed foods originate in Maine and one respondent indicated that 6-10% of their total food purchases of processed foods originate in Maine.



Section 8

When asked which growers or producers they purchase directly from, the institutions provided the following:

Apple Acres
Baer's Best Beans
Brackett Orchard
Chase Farms
Crown of Maine
Frugal Farm
Giles Family Farm
Golden Harvest
Greenlaw Gardens
Lakeside Family Farms (Talking with)
Native Maine
Oakhurst Dairy
Riverside Gardens
Touching Earth Farm

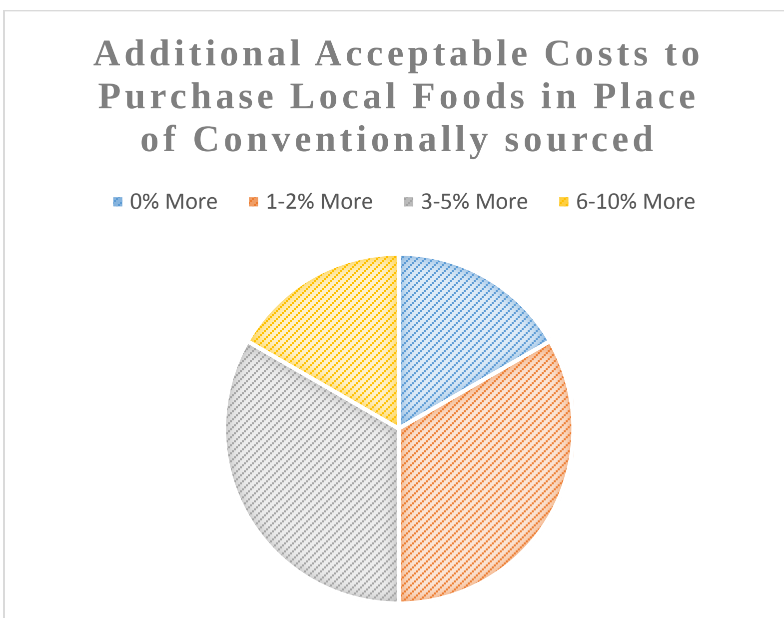
It is interesting to note that three of these are distributors, not farms, and one farm on this list went out of business around the time the surveys were taken.

Section 9

Two institutions indicated that they require the farms they purchase directly from to be GAP, GHP, or FSMA certified while the other four respondents indicated that they prefer the farms to be certified but do not require it.

Section 10

One institution indicated that no additional cost would be acceptable to them in order to purchase local foods in place of conventionally sourced foods but this respondent also had a target meal price of $5 or more. Two institutions indicated 1-2% more, two more institutions indicated 3-5% more, and the final institution indicated they were willing to pay 6-10% more. None were willing to pay 11% or more for local foods.



Section 11

Institutions cited the following barriers to purchasing and using locally grown food as their top three choices – the third most frequently cited barrier is actually two barriers that tied:

- Delivery and scheduling logistics, including reliability (5 institutions ranked this in their top three)
- Cost of produce/product (4 institutions ranked this in their top three)
- Budget Constraints (3 respondents ranked this in their top three)
- Availability (3 respondents ranked this in their top three)

All respondents indicated that they would be willing to purchase more local products/produce if they could reduce the barriers above and if the cost of the local products/produce were in their preferred cost range. As reported in the previous section, four institutions indicated that their preferred cost range could be 1-5% more for local foods purchased in place of conventionally sourced foods.

The foods the responding institution were interested in sourcing are shown in the tables below. All respondents indicated that they would be interested in sourcing cucumbers, apples, and blueberries locally.

Type of Vegetables and Percentage of Institutions Interested in Sourcing Locally	
	% of Respondents Interested in Sourcing Locally
Cucumbers	100%
Tomatoes	83%
Bell Peppers	83%
Summer Squash or Zucchini	83%
Carrots	83%
Potatoes	83%
Salad Greens (Leaf, Baby Kale, Mesclun, Frisee)	67%
Cabbage (Including Bok Choy)	67%
Corn	67%
Peas (Garden, Snap or Snow)	67%
Broccoli	67%%
Winter Squash (Acorn, Butternut, Delicata, Hubbard, etc.)	67%%
Sweet Potatoes	67%%
Other Root Vegetables (Beets, Turnips, Rutabagas, Parsnips, etc.)	67%%
Head Lettuce (Iceberg, Romaine, etc.)	50%
Brussel Sprouts	50%
Mushrooms	50%
Celery	33%
Beans (Green or Yellow)	33%
Garlic	33%
Onion	33%
Dry Beans	17%
Hot or Novelty Peppers	17%
Radishes	17%
Eggplant	17%
Cauliflower	17%

Fruits & Berries and Percentage of Respondents Interested in Sourcing Locally	
	% of Respondents Interested in Sourcing Locally
Apples	100%
Blueberries	100%
Other Tree Fruit (Pears, Peaches)	67%
Strawberries	67%
Melons (Watermelons, Cantaloupe)	67%
Other Berries (Raspberries or Blackberries)	33%

Meat, Fish and Eggs and Percentage of Respondents Interested in Sourcing Locally	
	% of Respondents Interested in Sourcing Locally
Beef	50%
Chicken	50%
Fish	50%
Pork	33%
Eggs	33%
Shellfish of Mollusk Type (Scallops, Oysters, Clams, Mussels, etc.)	17%

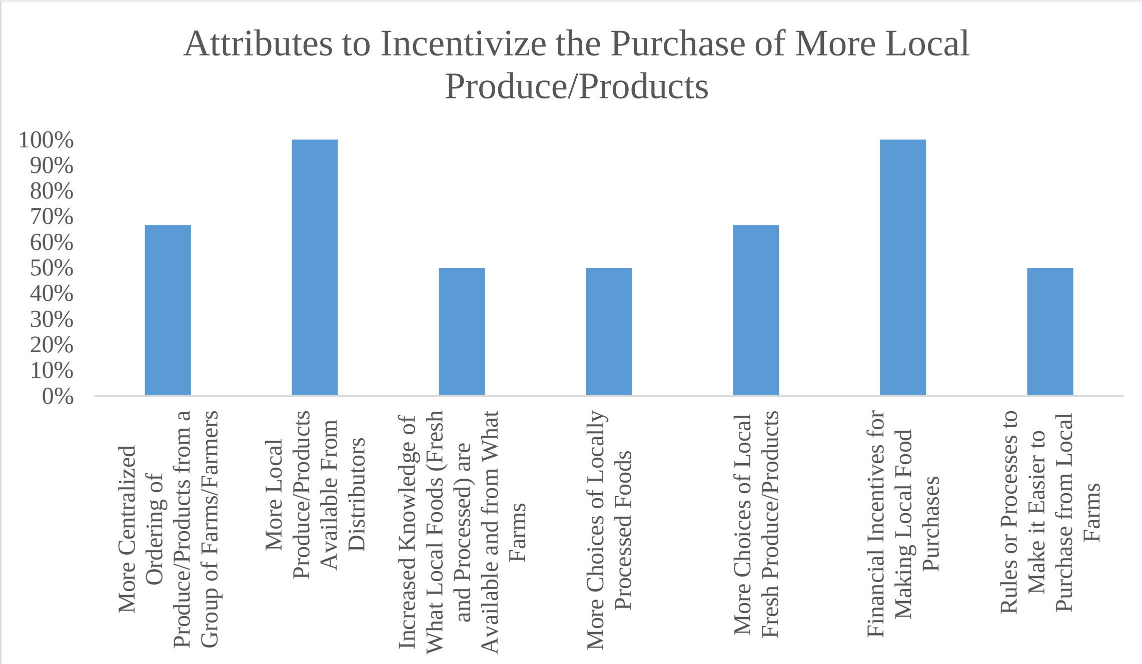
Section 12

All responding institutions indicated that the following would incentivize them to purchase more local food:

- More local produce/products available from distributors
- Financial incentives for making local food purchases

The institutions were allowed to choose as many incentives as they thought were relevant. Over half (67%) believe a more centralized ordering of produce/products from a group of farms/farmers would compel them while another 67% indicated more choices of local fresh produce/products available to them would help. Half of the responding institutions indicated increased knowledge of what local foods (fresh and processed) are available and from what farms would incentivize them. Another half of the respondents also indicated that if they had more choices of locally processed foods, they would be more compelled to purchase them. And finally 50% of respondents indicated having rules or processes to make it easier to purchase from local farms would be an incentive.

Two of the choices: more storage capability and more farms having GAP, GHP or FSMA certification were not selected by any of the institutions that responded.



<u>Section 13</u>

The following vendors/distributors are used by the six institutions that responded:

Five of the institutions use PFG Northcenter
Three institutions use Native Maine Produce and Specialty Foods
Three institutions use Sysco
Three institutions use U.S. Foods, Shaheen and/or Ovingtons
Two institutions use Crown O' Maine

Several of the institutions being used are Maine-based, while the rest are regional or national distributors.

Five institutions reported that they have indicated to a distributor or vendor, perhaps in a contract, that their institution has a preference for local produce/products. Only one has not.

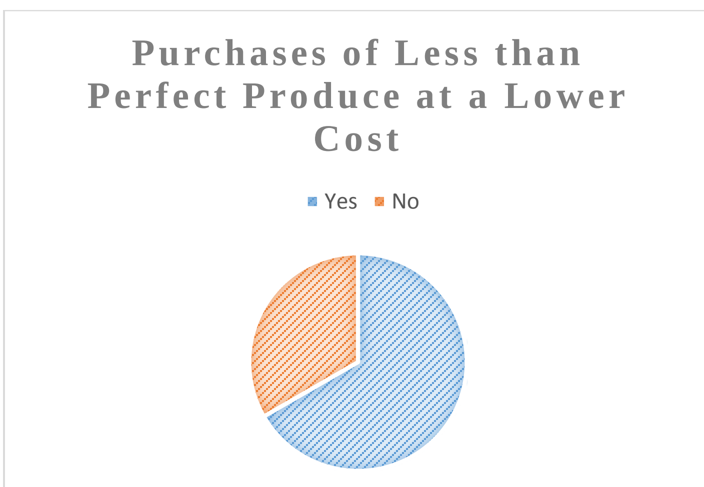
All responding institutions indicated that their facilities have the ability to receive product from multiple vendors.

Section 14

No institutions reported using locally processed food but five indicated they are interested in doing so. The remaining responding institution reported that they don't use locally processed foods and are not interested in doing so.

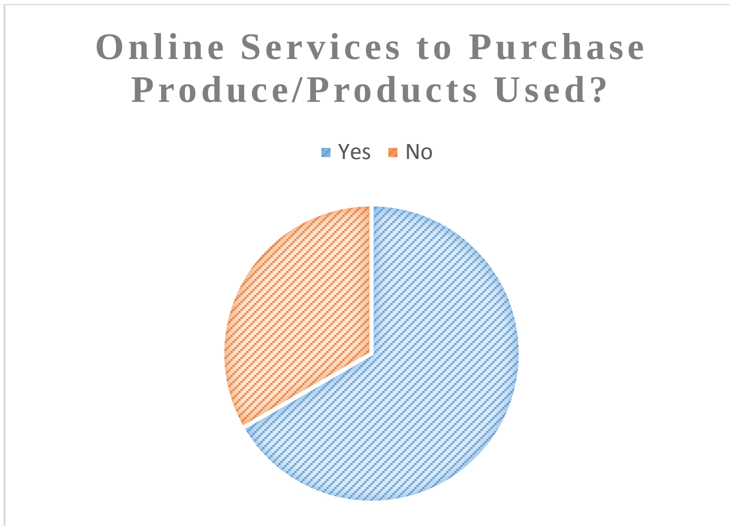
Section 15

Four institutions indicated that they would consider purchasing less than perfect local produce for processing or cooking if it would cost less, two respondents indicated that they would not. The institutions that responded negatively may have had food quality concerns.



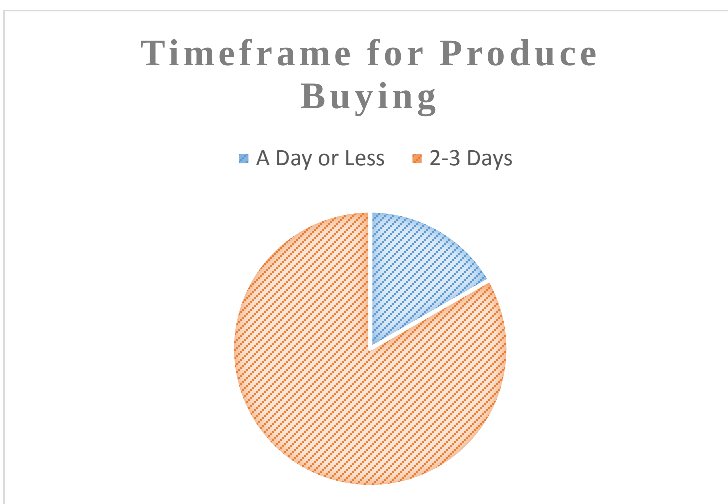
Section 16

Four institutions indicated that they use online services to purchase produce/products while two do not use online services. It is possible that the institutions that don't use online ordering aren't offered that option by the vendor or distributor they are using.



Section 17

One respondent indicated that they typically plan their produce buying in a day or less, five respondents indicated 2-3 days. A food hub would probably require the latter in order to aggregate and distribute economically.



Section 18

Half of the institutions reported that they take delivery of fresh food products daily, two institutions indicated they receive deliveries every few days and one institution reported they take deliveries of fresh food once a week. One of the strengths of a well-run food hub is scheduled deliveries that institutions can rely on.

Section 19

The types of food that require full preparation prior to purchase by the institutions that responded were corn (60%), green beans (60%), peas (60%) and root vegetables such as beets (20%). One respondent indicated that they require butternut squash to be peeled and diced. There isn't a great deal of consensus across the institutions as to which particular vegetables require more or less processing. These differences may be due to disparate staffing levels within each institution, varying meal types and menus, or even differences in interpretation of each level of processing as described by the question.

A few similarities stand out – most institutions who responded prefer their lettuce to be washed and pre-torn (bundled and/or chopped) and their broccoli to be washed and chopped (presumably stalks removed). This basic kind of processing is also a function that could be provided by a food hub.

Processing Required for Types of Food by % of Respondents

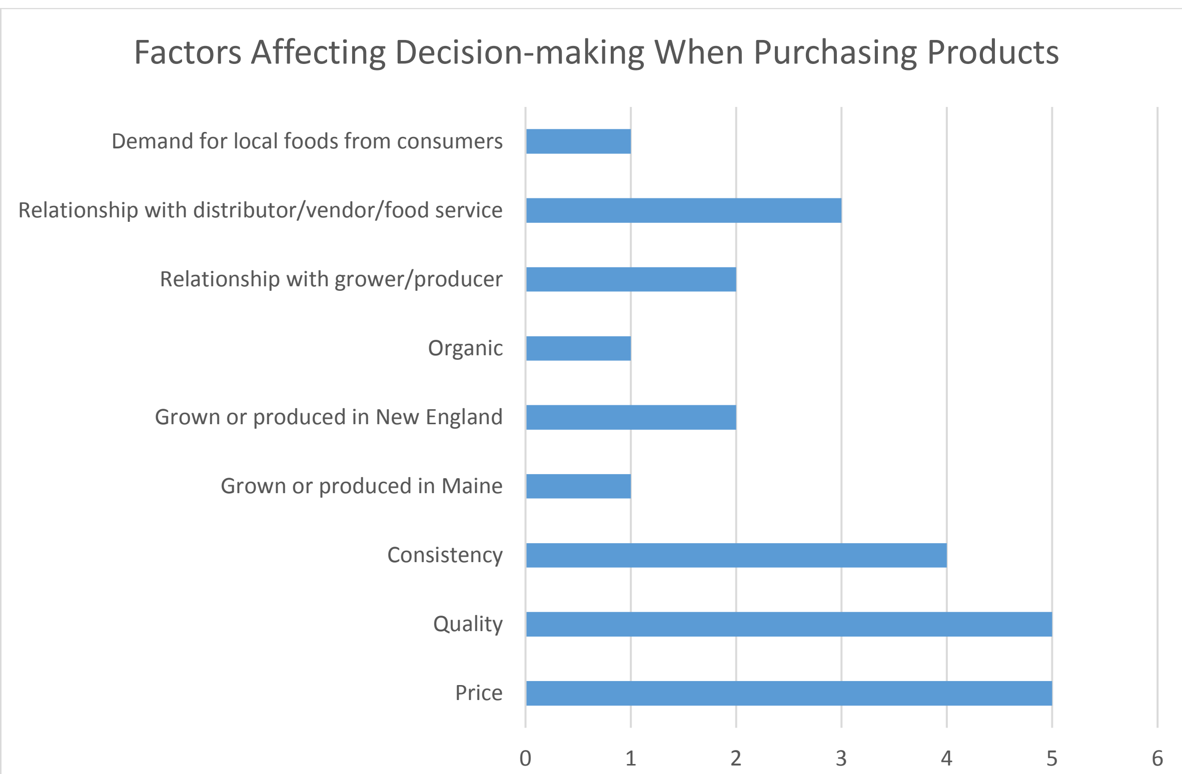
	Little to None, Mostly Just Washed	Basic, Washed Bundled and/or Chopped	Some, Washed, Peeled and Chopped, Packaged or Placed in a Mix/Combo	Fully Prepared, then Frozen or Canned
Bell Peppers	50%	50%		
Broccoli	17%	83%		
Carrots	20%	40%	40%	
Corn	20%		20%	60%
Green Beans	20%	20%		60%
Kale	25%	75%		
Lettuce Head or Leaf	17%	83%		
Peas	20%			60%
Potatoes	33%	50%	17%	
Root Vegetables Such as Beets	40%	40%		20%
Summer Squash or Zucchini	33%	50%	17%	
Tomatoes	50%	50%		
Winter Squash	17%	33%	50%	

Section 20

The top three factors affecting the decisions that responding institutions make when purchasing products/produce for their facilities were:

1. Quality
2. Price
3. Consistency

These choices relate to three of the barriers to purchasing local food that were cited in Section 11. Two barriers, cost of produce/product and budget constraints, clearly correlate with the price factor that institutions must consider. The consistency factor can relate back to the delivery and scheduling logistics including reliability barrier but it is also probably related to the products/produce itself. One institution commented that they had problems buying from individual farms because of drought and blight issues with crops which caused deficiencies in their orders. The top factor cited, quality, is something that farmers/producers strive for and would be a very high priority for a successful food hub. Building a relationship with the institutions that the food hub serves will also make any issues that arise, easier to resolve.



<u>Section 21</u>

When asked to if there was anything else they would like to comment on, two institutions responded. One reported that they are currently working with a national organization to advance the initiative of purchasing locally grown and processed foods. The other reported that when attempting to purchase local food, they found that small farmers did not have sufficient quantity and that price was an issue. A food hub could assist this latter institution through aggregating produce across member farms to meet the institution's quantity demands and by negotiating prices with both the farmer/producer and the institution so there are no surprises.