**San Miguel Watershed Community Food Assessment**

**Fall 2010 – Spring 2011**

**Introduction**

The San Miguel Watershed Community Food Assessment was conducted under a grant that the Telluride Foundation received from the American Recovery and Reinvestment Act Stimulus fund from the Department of Health and Human Service's Strengthening Communities Fund. The food assessment was conducted to ascertain whether food resources within the watershed are being used to provide a maximum benefit to the residents of the watershed. Surveys were developed to determine the status of the production and consumption of food within the watershed and to obtain the perspectives and interest of residents in local production and availability. Consumers, restaurants, grocers, farmers/ranchers, and schools in the watershed were surveyed. The following report presents the information gathered in this assessment.

**Consumer Survey**

Surveys were mailed to residents in the west end of the San Miguel Watershed, including Norwood, Redvale, Nucla, and Naturita. The survey was also posted on the web in an interactive form the could be filled out on line. Of the 1,977 surveys that were mailed, 16% percent or 301 surveys were returned. An additional 41 consumer surveys were completed of those that were randomly distributed at the Telluride and Norwood Farmer’s Markets and provided to local libraries. Figure 1 shows the response in percent of total surveys returned from each region.

Twelve percent of the surveys came from the Telluride area, which includes Ophir, Rico, and Placerville, 32% percent from Norwood, which includes Wrights Mesa and Deer Mesa, 26% from Nucla, 11% from Naturita, 4% from Redvale, and 3% from other areas that included Cahone, Egnar, Gunnison, Montrose, and Paradox. Females completed 75% of the consumer surveys. Ninety-three percent were completed by Caucasians and 3% by Native Americans. The age distribution of consumers completing the survey is depicted in Figure 2. Almost half of respondents were over 50 and less than 64 years of age and another 30% were between 30 and 49 years of age. Fourteen percent were over 65 years of age and 8% were over 75 years of age. Only 5% were between 18 and 29 years of age.

Forty-five percent of consumers that completed the survey attained a High School Diploma, 35% attained a Bachelor’s Degree, and 20% attained a Graduate degree. Eighty-nine percent of respondents were the primary shopper, and 94% cooked for their household. Seventy-five percent of respondents had kids less than 18 years of age in their household, with 63% having two adults in the household, 29% having only one adult, and 8% having three to five adults in the household.

The median household income for the state of Colorado in 2009 was $55,735 (www.ers.usda.gov). Figure 3 shows that 34% of consumers reported annual household incomes greater than $50,000 with 14% or almost half reporting an income of over $80,000. Twenty-four percent of households reported incomes between $30,000 and $50,000. Thirteen percent of households reported incomes between $20,000 and $30,000 and 16% between $10,000 and $20,000. About 8% reported an annual income of less than $10,000. Of the 62% making less than $50,000 a year, 37% or more than half make less than $30,000 a year.

Figure 4 shows that 75% of consumers reported no use of food assistance programs. The remaining quarter of consumers indicated use of the Food Stamp Program (9%), Food Bank Program (9%), and Commodities Program (8%), as well as the Free or Reduced School Lunch Program (6%) and the Senior Food Program (6%). The Women, Infants, and Children Program (WIC) was used by 3% of consumers and the Catholic Charities Food Share Program by 2%.

As shown in Figure 5, the top three most important factors among consumers in making food choices were price (60%), freshness (46%), and nutrition (44%), followed closely by healthy (39%). Taste (29%), locally-grown (22%), safe (20%), and convenient (19%) were considered evenly as top factors by roughly a quarter of consumers, while organically grown was considered a top factor by 15% of consumers. Variety was a top factor for 10% of consumers, brand name 4%, and 3% chose other factors. Should the price of locally-produced foods be affordable, all factors but brand name would be met by the availability of locally-produced foods.

As seen in Figure 6, consumer eating habits are influenced mostly by the availability of foods (65%) and price (60%). Were locally-produced foods to be affordable and available the remaining top factors of food being nutritious (47%), healthy (39%), taste good (29%), and be locally grown (22%) would be met.

Table 1 illustrates that the majority of consumers shop at their local grocer in both the summer (32%) and winter (73%). Farmers’ markets are the next most frequented shopping locations for consumers in the summer (25%) and Wal-Mart in the winter (28%). Natural Foods Grocers are also frequented in the winter by 18% of consumers, whereas Montrose and City Market receive roughly 10% of shoppers year-round. Grand Junction sees 6% of the watershed’s shoppers year-round. In the summer 6% of consumers in the watershed grow their own food or get food from friends who garden or farm.

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| Table 1. Consumer Shopping Locations | | |
| Shopping Location | Summer | Winter |
| Black Canyon Foods | <1% | 1% |
| City Market | 8% | 10% |
| CSA | 3% | <1% |
| Farmers' Market | 25% | 1% |
| Grand Junction | 6% | 6% |
| Grow Own Food | 6% | 2% |
| Local Grocer | 32% | 73% |
| Montrose | 10% | 10% |
| Natural Foods Grocer | 5% | 18% |
| Safeway | 2% | 2% |
| Sams Club | 2% | 2% |
| United Natural Foods, Inc. | 1% | 1% |
| Walmart | 10% | 28% |

The primary factors determining where consumers shop are depicted in Figure 7. A convenient location influences 66% of where consumers shop, price 46%, quality of food 37%, variety 36%, and access by transportation 4%. Were local food to be affordable and available at a convenient location, the quality of locally-produced foods would make such location all the more appealing for shoppers.

Figure 8 illustrates that 84% of consumers want to see more locally-grown foods in grocery stores, 78% would like to see more fresh fruits and vegetables, 46% bulk foods, 39% organic foods, 12% ethnic foods, 2% more instant foods, and 13% want other items.

As shown in Figure 9 only 1% of consumers dine out daily, 13% a few times a week, 15% once a week, 34% a few times a month, and 39% less than once a month.

Table 2 shows the local restaurants that were listed as being among the top three restaurants visited by consumers. All other restaurants in the watershed were listed by less than 4% of respondents.

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| Table 2. Restaurants Most Frequented by Consumers (80% Response) | |
| Lone Cone | 33% |
| Blondie’s | 23% |
| Happy Belly Deli | 23% |
| 5th Avenue Grill | 19% |
| West End Pizza | 19% |
| La Cocina de Luz | 17% |
| Costa Alegre #2 | 14% |
| Hitchin’ Post | 6% |
| Two Candles | 5% |
| The Butcher and the Baker | 4% |

Sixty-two percent of consumers dining out prefer restaurants according to their location and the taste of the food, as depicted in Figure 10. Price affects the restaurant choice of 37% of consumers, wholesomeness of food 32%, and variety 25%. Twenty-one percent prefer restaurants with locally-grown items, and 11% with certified organic items.

Sixty-eight percent of consumers grow or harvest their own food from the wild. Reasons listed in Figure 11 include for freshness, taste and nutrition (88%), enjoyment of gardening (75%), feeding self and family (61%), cost of food from grocery store (47%), control over growing practices and safety (47%), for variety not available elsewhere (20%), and other considerations (12%). The assessment shows here that the majority of consumers that completed the survey are producing food locally.

Local food production entities used by consumers are shown in Figure 12. A home garden is used by 89% of consumers, 21% use greenhouses, 11% use Community Supported Agriculture (CSA), and 9% use community gardens.

The assessment found that 73% of consumers would like to see farm-to-school programs, 64% a food co-op, 57% farm-to-chef programs, 43% food buying clubs, 41% affordable community garden plots, 41% gardening education programs, 40% community greenhouses, 32% coupons issued by WIC for use at farmers markets, 25% affordable cooking and food processing classes, 24% community kitchens with processing space, and 8% would like to see other food programs not listed.

The surveys showed that 63% of consumers feel that cost of living affects their ability to eat well and 53% feel that food is generally unaffordable. Thirty-four percent of consumers reported that they shop for the least expensive food, 25% reported to stretch meals, and 19% limit the size of meals due to lack of money. Fifteen percent reported to have skipped meals and 10% had gone to food banks due to lack of money to buy food. Figure 14 shows various cost-of-living issues that affect the ability of consumers to eat well.

When asked what it means to eat well, healthy food, fresh, and nutritious food were in the top three at 35%, 27%, and 21%, respectively, as shown in Figure 15. Having fruits and vegetables was reported by 21%, affordable food by 20%, organic food by 19%, locally-grown food by 18%, a balanced diet and variety of foods by 15%, minimally processed food by 14%, flavorful food by 9%, quality food that is clean and safe by 7%, whole foods by 6%, and wild foods were considered by 1% of consumers to enable eating well.

In the last year, 55% of respondents often purchased food labeled organic and 9% reported always selecting food labeled organic. Food labeled to have been produced in Colorado was said to have been purchased often in the last year by 46% of the respondents and always purchased by 27% of the respondents.

Consumer concerns about food, shown in Figure 16, are price (62%) the distance that food travels (49%), the variety or selection (48%), toxic residue (43%), bacteria contamination (36%), if the food is organic (24%), and time to prepare or cook (18%).

To summarize, roughly 16% of the residents in the watershed returned a completed consumer survey. Two thirds came almost equally from the Norwood and Nucla areas. The annual household income for the majority of households in the watershed is less than the Colorado average of over $50,000. Consumers seek healthy, fresh, and nutritious food to eat well, though eating habits are dictated by availability and price. Food choices are also dictated by price, though freshness, nutritional value, and healthfulness also play a role. Shopping destinations are chosen primarily by convenience in location, and also by price, quality, and variety of foods offered. Grocery stores are the primary shopping location for 73% of consumers during the winter and 32% in the summer. Almost 20% of consumers shop at Natural Foods Grocers in the winter and only 5% in the summer. A quarter of consumers shop at Farmers’ Markets in the summer and CSA’s see a 2% increase in customers. The number of consumers growing their own food in the summer is 6%.

Eighty percent of consumers want to see more locally-grown food in their grocery stores, and almost as many want to see more fruits and vegetables as well. Consumers are most concerned about price, the distance that food travels, and the variety of food available. Most consumers want to see farm-to-school programs, food co-ops, farm-to-chef programs, and food buying clubs. The majority of consumers dine out less than once a month, choosing restaurants based on convenience of location and taste. Two thirds of the consumers have home gardens, either for access to fresh and nutritious food, the joy of gardening, or to feed their families.

**Farmer/Rancher Survey**

A total of 20 farmer/rancher surveys were completed. Seventy percent of them came from the Norwood area and the rest were from Bedrock, Hastings Mesa, Naturita, and Redvale. The farms and/or ranches range in time of operation from less than 5 years to over 50 years and acreages range from 1 acre to 4000 acres. Ninety percent intend to continue farming and/or ranching, with 56% wanting to maintain current acreage under production and 44% wanting to increase current production acreage.

Twenty-six percent of the farms and/or ranches are over 1000 acres, 37% between 100 and 500 acres, and 42% are less than 100 acres. Twenty-eight percent of the farmers or ranchers use 100 to 600 acres of their total land and the remainder use less than 100 acres of their land. Eleven percent also lease more than 2000 acres to farm and/or ranch on.

The state of agriculture was stated by 68% of farmers and ranchers to be struggling. Factors listed to be contributing to the struggle were lack of profit, inability to get land because of credit, a poor market, transportation costs, altitude, lack of water, lack of agency help, the economy, regulations, need for marketing, high overhead, short growing season, and lack of young farmers taking over. Things that would prevent farming or ranching in the region included climate change, loss of land leases, regulations, cost of land, and the uranium mill. The altitude, weather, agency assistance, water and land availability, and economy were also listed as factors contributing to agriculture thriving in the watershed. Other positive factors listed were the value of product, devoted grocers, family-run operations, and knowledgeable people.

As shown in Figure 1, the leading factors affecting the viability of farms and ranches were reported to be access to water (94%), quality of land (84%), support and help from other farmers and ranchers (59%), property taxes (47%), technical assistance from extension and other agencies (41%), and financial or credit issues (22%).

Measures taken to improve production and minimize cost include doing own work, organic farming, moving calving to late spring, limiting mechanical expenses, bringing water lines and electricity to every pasture, installing sprinklers, weed control, adding greenhouses, hoop-houses, barns, cages, and fences, adding grass seed in fall and fertilizing in spring, buying bulk and storing large quantities of grain, not stressing the land by utilizing good farming practices and animal husbandry, diversifying crops, thermal image labels, more efficient delivery system, leasing land, as well as using rotational grazing. Having an outside job, family help, a strong commitment, and the forming of a CSA were also mentioned as additional factors contributing to farm and/or ranch viability.

Currently, as seen in Figure 2, the farmers and ranchers participating in the survey receive most of their income from off of their ranch or farm. About half obtain from 20 to 60% of their income from on the farm or ranch already, and the remainder obtains an average of 10% of their income from on the farm or ranch.

Eighty-eight percent of the farmers and ranchers that completed the survey would like to sell more locally. It was stated that should their be local support, merchandising their products within the watershed would not only lower transport costs but also support other local ranchers and farmers. Figures 3 and 4 show the percentage of products currently sold at local and non-local markets:

Of the currently marketed products, shown in Table 1, hay was reported by 63% of farmers to require the most machinery and 47% reported that it requires the most labor. Beef production was reported by 17% to require the most labor. Cows, sheep, potatoes, veggies, grain, and eggs were also mentioned as requiring the most machinery and labor. Thirty-three percent reported that hay required the most processing and another 33% stated that raising meat required the most processing. Chickens, elk products, garlic, and eggs were also mentioned as requiring the most labor. Fifty-nine percent felt that prices on products keep up with cost of production, though only 15% felt that increasing external costs such as fuel, electricity, and workman’s compensation could be passed on.

Table 1. Products Currently Marketed by Local Farmers and Ranchers

Meat: Bulls, cows/calves, yearlings, grass-finished beef, hogs, pork & pork fat, pork sausages, elk & elk products, Boer goat meat, mutton & lamb, chickens, turkeys, eggs.

Feed &Seed: Alfalfa hay, grass hay, mixed hay, oats, wheat.

Fruit: Raspberries, strawberries, apples, cherries, pears.

Herbs: Basil, cilantro, lavender, mint, oregano, thyme.

Vegetables: Beans, carrots, garlic, green beans, kale, lettuce, onions, potatoes, peas, peppers, pumpkin, tomatoes, turnips, squash, zucchini.

Other: Canned fruits & vegetables, fruit jams & jellies, salsa, nursery plants, flowers.

Grass-fed beef, dairy, goats, sheep, grain, native feed, wheat, corn, berries, raspberries, herbs, vegetables, potatoes, onions, and flowers were all listed as items that farmers and ranchers felt would be marketable if produced on their land in addition to what was already being produced. As shown in Figure 5, reasons given for why any of these items is not already under production were lack of time (23%), need for fuel, labor (15%), machinery to harvest (8%), more capital (8%), a market (8%), distribution (8%), that they were trying to sell (8%), and that they already give excess to friends and neighbors (8%).

Government programs that were listed as being helpful were financial help, land owner game tags, soil conservation fence programs, Natural Resources Conservation Service (NRCS) irrigation and fencing grants, noxious weed control cost share, as well as grants from the Sustainable Agriculture Research and Education Program (SARE), and the Research, Education, Action and Policy on Food Group (REAP). The inability to move income over more years was listed as a government program hindrance. Lacking large enough BLM leases, the inability to deal effectively with predators, and in-stream flow requirements were listed as land or environmental policy issues that might hinder farming and ranching. Herbicide and pesticide management regulations were stated as being helpful for the status of organic farms.

The most helpful technical assistance was listed to be soil testing (22%), marketing (22%), Foxtail and other weed control (22%), water testing, improved irrigation, grant writing, and NRCS funding and technical advice. Sixty-seven percent felt that added infrastructure would be helpful and hay sheds, extra buildings, and fencing were specified. Distance to grain handlers and meat processors was stated as being detrimental due to fuel and time spent by 42% of respondents. It was reported that a closer or more available meat processing operation would enable selling products locally. Larger BLM leases were also stated as being desirable.

For people who want to begin farming or ranching in the area, challenges listed include finding suitable and affordable land, costs, loss of water, the weather, lack of experience, limited and highly variable season, noxious weed management, and the need for marketing. To encourage improvement of the local food system it was suggested that costs should be kept down, more water needs to be made available, local awareness must be raised, local distribution must be available, marketing is needed, natural feeds need to be more affordable, support is needed from local consumers, restaurants and grocers, and a beef packing plant is needed.

Seventy-six percent of respondents would support formation of a Food Policy Council or Producers Co-operative to promote local agricultural markets and production. Seventy-one percent would like to be listed in a local producers’ directory and 55% wished to be notified on the progress of the food assessment or provided with the final report.

In summary, most of the 20 surveys completed came from farms and ranches in the Norwood area, the remainder came from the west end of Montrose County and out to Bedrock. Almost all farmers and ranchers wish to sell more of their products locally. Most income currently comes from off of their farm or ranch, though about half get anywhere from 20% to 60% of their income from on their farm or ranch. Products currently marketed include beef, pork, elk, goat, lamb, chicken, turkey, eggs, hay, oats, wheat, raspberries, strawberries, apples, cherries, pears, basil, cilantro, lavender, mint, oregano, thyme, beans, carrots, garlic, green beans, kale, lettuce, onions, potatoes, peas, peppers, pumpkin, tomatoes, turnips, squash, zucchini, nursery plants, and flowers.

Forty-two percent of farmers and ranchers use less than half of their acreage and 58% use more than half of their acreage. A third of the farmers and ranchers only use a quarter of their acreage. Almost half of the farmers and ranchers wish to increase their acreage under production and would incorporate more profitable goods provided they had the time, as well as more fuel and labor, some capital and machinery. Added infrastructure, local grain handlers, and a local meat processor would cut costs and allow the merchandising of more products locally. Cost is listed as a primary obstacle for newcomers, among finding suitable land, obtaining sufficient water, managing fickle weather, and lack of experience. Government assistance is reported to be helpful with weed control, financing, marketing, water and soils testing and conservation, irrigation, and fencing; though some government involvement limits leases, water use, predator control, and spreading income over more years. Local awareness and support, local distribution, and marketing are needed to revive the struggling agricultural sector within the watershed. Improved access to credit, suitable land, and water are needed, as well as young farmers to take the reigns. The majority of the farmers and ranchers support the creation of a producer’s cooperative and want to sell their products locally.

**Grocery Store Survey**

Surveys were delivered to all 8 grocery stores in the watershed and 5 or 63% were completed and returned by either an owner or manager. The grocers that participated have been operating from 2 to 15 years locally and are all privately owned. Points of pride include availability of fresh cut meat everyday (2 have their own butcher), fresh produce, quality foods, convenience, and size. Criteria used when purchasing food to sell were listed as customer demand or request, quality, new items, research, price, quantity, and popularity. Food purchased is expected to be fresh, at a decent price, delivered in a timely manner, and of high quality. The top distributors listed were Associated Food Stores (28%) and United Natural Foods, Inc. (14%), followed by Albert’s Organics, Callaway, Frito Lay, Mountain Valley Fish, Pepsi, Rainbow Foods, and Sysco all listed with a 7% frequency. Grocers get 95%, 90%, 80%, and 65% of their food from Associated Food Stores and one grocer gets 87% of its food from United Natural Foods, Inc. Forty percent of distributor contracts are binding. Three grocers have no flexibility in choice of suppliers. Three grocers reported that prices from distributors are less than local food prices. One stated that distributor prices are greater. Three grocers stated that their budget is flexible for purchasing local food; though all feel potentially higher prices would negatively impact sales.

All grocers experienced a 5 to 10% price increase in food over the last year that is believed to perhaps be the result of gas prices, regulations, demand, the weather, unnecessary recalls, processing, and delivery charges. Four grocers increased their prices to cover the increasing cost of food, which was noticed at 2 stores. Three grocers currently sell local food, though it comprises only 1 to 10% of their total food purchases. Local meat and eggs purchased are less than 1% of that, fruit from less than 1% to 5%, vegetables 5%, and baked goods less than 1%. One to 2% of beef sales were reported to be from local sources at 2 stores. Local food is purchased and delivered from Parrore Farms, Tomten, Dragon Fly, Al's Eggs, Colorado Elk & Game, Indian Ridge, Green Place Ranch, Big B's, Indian Ridge, BIT, Cindy Bread, and Austin Farms. Two stores use local items seasonally and the other uses them year round. All advertise that they sell local food.

Three grocers stated an interest in selling more local food and three reported that their patrons expressed an interest in local food as well. Three grocers felt patrons would be willing to pay a higher price for fresh local food and would like to have a local source for organic foods, which they would be willing to pay higher prices for. Four grocers felt that using any or more local food would benefit their store. All five grocers listed local items that they would use, which included produce, breads, cheese, fruit, and more of what they already use. Four of the grocers stated that they have been approached by a local food producer to purchase local products and five stated that they would purchase more local food if there were a centrally-organized distribution system. All five grocers said they have the flexibility to purchase local food in season, if it is available and the demand is there. Two grocers stated they would purchase food that had been stored, so long as it was still fresh.

Three out of four also stated that there are legal constraints to purchasing local food according to agricultural laws and that meat needs to be inspected to meet the United States Department of Agriculture (USDA) standards. Meat also needs to be de-boned, packed in sections, USDA pre-packaged for retail, and wrapped with Universal Product Code (UPC) labels. Produce needs to be washed, bunched, bagged, and ready for the shelf. Dairy needs to be approved by USDA, and packaged with UPC labels. Baked goods need to meet commercial kitchen regulations, and be packaged with UPC labels. Only one grocer out of four reported that they would require a minimum quantity from a local supplier, and three out of four stated that they have storage constraints for purchasing local food.

Depicted in Figure 1, obstacles to selling local food were primarily affordability, legal requirements, availability, quality, and convenience. Patron’s choice, lack of distribution system, and other issues were also noted, followed by quantity, presentation, and inadequate receipts from producer.

Figure 2 illustrates benefits to grocers selling local foods, primarily supporting local farmers, ranchers, and the economy.

Challenges to operating in this area include keeping shoppers local with competition from big stores out of town, lack of consistency and availability of local foods, limited storage space, and high costs. Most grocers receive more than 80% of their food from one distributor and all have experienced an increase in food costs over the last year. Less than 10% of the total food purchased by grocers is local, though most are interested in selling more local foods and reported that patrons have expressed an interest in purchasing local foods. All grocers have the flexibility to purchase local foods, provided there is demand and availability. None of the grocers would require a minimum quantity of local product and most have storage constraints. All grocers reported that a centralized local distribution system would enable them to purchase more local foods.

**Institution Survey**

Surveys were completed by all five schools in the watershed and one food bank that received a survey. Two food banks did not receive surveys. High School, Middle School, Elementary School, and Preschool were all represented. The schools reported to employ from 1 to 5 kitchen staff. Seventy-five percent of the schools have a nutrition, wellness, or food policy, though only one has a nutritionist at their facility.

For the schools, only one had a specific number of hours that kids are taught about nutrition and cooking. Two schools had classes that are linked with a garden or greenhouse and one school features visiting speakers that talk about food, nutrition, and/or agriculture. Only one school has field trips to a farm in the area, though three said they would be interested in a list of local farms that would offer tours to schools. One school reported that the Colorado Department of Education advised there were no farms offering tours in their area.

The number of meals reported to be served by four of the schools in fall, winter, and spring were 3, 14 (plus snacks), 160, and 2200. Three schools stated that there are seasonal trends to the meals served. The three most popular dishes served were reported by four schools to include the nacho bar, mandarin orange chicken, macho nachos, pancakes, the sandwich bar, BBQ pulled pork, homemade spaghetti, egg wraps, oriental food, breakfast, pizza, taco salad/nachos, homemade macaroni and cheese, and the veggie tray. Three schools reported to have a salad bar available from a few times a year to five days a week. The salad bar was reported to comprise 5 to 15% of the total food budget of one school.

Four schools listed the following when asked what percent of meals prepared at their facility are from fresh food: fresh fruit is used when reasonable, 75-80%, 85%, and 99%. Four schools reported that the following percentage of meals prepared at their facility are from scratch: approximately 70%, 75-80%, 85-90%, and 99%. Three schools stated that they have commercial kitchens. Two of these commercial kitchens are shared with others. Two schools stated that their kitchen facilities do not adequately serve their needs. Items listed as needed to fully prepare, store, and serve meals from fresh produce on site were food processing equipment and dry good storage space.

Two schools reported having access to a garden and greenhouse on site, and one reported access to an off site ranch. Two schools reported that the gardens and greenhouses on site were managed by the kitchen staff. The items grown were reported by three schools to vary, but include herbs, snap peas, squash, and pumpkins. One school reported to have no interest in starting a garden or greenhouse on site. Two schools compost food waste and the other three put food waste in the trash. Four schools have recycling programs to handle most or all of the following recyclables: metal, plastic, paper, cardboard, ink, aluminum, and cell phones.

Food distributors serving four of the schools include Clark’s Market, US Foods, Callaway Packing, Sysco, USDA Food Bank of the Rockies, Natural Grocers, Independent Farmers, Earth Grains, and Meadow Gold. Of these distributors, US Foods provides 85% of the food to one of the schools, and Callaways provides 80% of the food to another. Clark’s Market also provides 80% of the food to one of the schools. Clark’s Market and Callaway each provide 50% of the food to another of the schools. Callaways, USDA Food Bank of the Rockies, Meadow Gold, and Earth Grains are the principal suppliers of the fifth school, though percentages of food provided were not reported. As for increased food prices, one school reported a 2-3% increase over the last year, while another stated that they had to double their food budget. The increase in food prices is believed to have been due to oil and gas prices, agricultural lobbies, the economic downfall, the remoteness of the area, corn shortages, and economic help provided by the government. No school reported raising prices to cover any increases in the cost of food. Figure 1 shows the allocation of annual food budgets to the different food groups.

Three schools reported flexibility in choice of supplier. Lack of choice was stated to be because not many distributors deliver to the area for small orders. Three schools also reported to have a somewhat flexible budget for purchasing local foods, though uncertainty was expressed concerning possible regulations that may apply. The impact of projected higher prices on school food programs were stated to include likely staff turnover due to lack of good pay, lack of funds to purchase higher priced local foods, that less food would be donated, and simply that the impact would be “huge”.

Three schools currently serve local food, two seasonally and one year round. Only one school publicizes that they serve local food. Local items reported to be served include Dove Creek beans, Cortez milling flours, seasonal produce, Olathe corn, Hotchkiss applesauce, juices, greenhouse-grown lettuce and herbs, peaches, apples, eggs, and milk. Some of these local items are provided by Callaway Packing, though it was stated by one school that local food must be picked up and is not delivered. Three schools stated that there is an interest in serving more local food and felt it would benefit their food service. Three also reported that parties associated with their facility have expressed an interest in serving more local food. Two schools felt their facility would be willing to pay higher prices for fresh local food and two did not. Two schools would like to have a local source for organic food and one felt their facility would pay more for it. Two schools reported to have been approached by a local food producer. One school was uncertain about applicable regulations and the other scheduled an appointment that the local producer did not show up for. Figure 2 shows obstacles listed to serving locally grown food at schools.

Three schools stated that they would buy local food if there were a centrally-organized distribution system for it and that the food would need to be delivered. Preparation of locally delivered food included none, Hazard Analysis Critical Control Point (HAACAP) certified, USDA inspected and certified, canned, and boxed. Figure 3 shows benefits schools listed to serving local food.

The food bank surveyed stated that the survey did not fit their facility, but provided that in the summer it would be nice to give donated leftover farmers’ produce to the people that they serve. Two schools wished to be notified on the progress of the assessment.

In summary, all five schools in the watershed participated in the survey and were shown to range widely in number of meals served and use of local agricultural resources. Most of the schools are interested in serving more local foods and would do so if the foods were available through a centralized distribution system and at an affordable price. All of the schools receive the majority of their foods from a single distributor. More than half of the schools have some flexibility in their budget to purchase locally produced foods. No food is served that is produced within the watershed, though most serve food that is produced in nearby regions. Obstacles to serving local food include possible regulations, cost, availability, and lack of a distribution system. Additional dry storage space and processing equipment is needed for two of the schools to be able to prepare meals from local produce.

**Restaurant Survey**

Surveys were delivered to the majority of the restaurants in the watershed, 38 altogether. A total of 22 or 58% were completed and returned by owners (50%), managers (33%) and executive chefs. The participating restaurants have been operating from less than one year to over 30 years locally. A total of 29% of the restaurants participating in the survey have been operating for over 15 years, 62% for more than 10 years, 38% for less than 10 years, and 24% for less than 5 years. Eighty-five percent of the restaurants are privately owned and the remaining are business partnerships. Almost 70% of the restaurants reported that more than 90%their food is prepared from scratch, as depicted in Figure 1. Fourteen percent prepare half of their food from scratch, 5% prepare 20% of their food from scratch, and 15% prepare less than 5% of their food from scratch.

Almost half of restaurants reported that more than 90% of their meals include fresh food, as shown in Figure 2, though only a few noted this in describing their establishment. Almost 70% reported that more than 80% of their meals include fresh food, and almost 80% include fresh food in at least half of the meals prepared. Only a third of restaurants include fresh food in less than 25% of their meals, and only 14% include fresh food in less than 5% of their meals.

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The top three distributors supplying food to restaurants are shwon in Table 1:

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| Table 1. Top Three Distributors Used by Restaurants and Amounts of Food Provided | | | |
| Distributor | Frequency Reported to be Used | Maximum Percent of a Restaurant’s Food Provided | Average Percent of a Restaurant’s Food Provided |
| Sysco | 50% | 95% | 56% |
| US Food Service | 38% | 100% | 59% |
| Mountain Valley Fish | 22% | 25% | 17% |
| Red Hat | 13% | 30% | 20% |
| UNFI | 13% | 50% | 25% |
| Callaway | 9% | 30% | 15% |
| Albert’s Organics | 6% | 20% | 15% |
| Italco | 6% | 5% | 5% |
| Sam’s Club | 6% | 30% | 25% |
| Honolulu Fish Co. | 3% | 40% | 40% |
| Hungry | 3% | 35% | 35% |
| Local | 3% | 20% | 20% |
| Local Beef & Elk | 3% | 5% | 5% |
| Lombardi Bro’s | 3% | 10% | 10% |
| Mark the Breadman | 3% | 5% | 5% |
| Mt. Hope | 3% | 0.25% | 0.25% |
| Redd’s Merc | 3% | 20% | 20% |

A total of 78% of restaurants felt that prices from distributors were not comparable to local food prices. Flexibility in choice of suppliers was reported by 64% of respondents. Little to no flexibility in budget for purchasing local food was reported by half of the restaurants. Forty percent of restaurants reported to have flexibility in their budget to purchase local items. Over seventy percent of restaurants reported to currently serve some local food and 65% advertise that they do so. Ninety-five percent of restaurants reported that there is an interest in serving more local food, 67% of which has been expressed by patrons. Only 44% however, felt that customers would be willing to pay a higher price for fresh local food. Ninety percent of restaurants reported an interest in a local source for organic food and 68% stated they would be willing to pay more for local organic foods.

Local items served include vegetables out of Montrose, local beans, cabbage, corn, cucumbers, herbs, kale, mushrooms, lettuce, melon, onions, peppers, potatoes, spinach, squash, sunflower sprouts, tomatoes (Utah and local), zucchini, apples, peaches, pears, plums, raspberries, beef (Durango and local), chicken, eggs, elk, lamb, and other items in season and/or reasonably priced. Of the percentage of local food purchased, it can be observed in Figure 3 that vegetables comprise the majority of local food purchased and that the remaining major food groups are distributed relatively evenly.

The following sources were listed for local foods, 88% of which is delivered and 94% used seasonally:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Abundant Life Farm | | Hungry | | Paradox | |
| Alex Ulivi | | Indian Ridge Farm | | Red Hat | |
| Big B’s | | James Ranch | | Steve Clements | |
| Bill Mattson | Mike Anders | | Le Roux Natural Foods | | Sysco |
| Fox Fire Farm | | Lowell Watson | | Tomten Farm | |
| High Wire Ranch | | Oasis | | Troyer Poultry | |
| Homestead Beef | | Paradise Farm | |  | |

Of locally viable food items, respondents reported average amounts in pounds per month used during summer and winter seasons. Figures 4 and 5 below show total amounts of each item used by all respondents combined.

Respondents indicated additional local food items that they would be interested in purchasing as depicted in Figure 6. Ninety-five percent stated that local items would need to be delivered

Local food vendors had approached 55% of restaurants and local food was purchased 65% of the time. Cost was given as the primary constraint to purchasing local foods. Having quality foods available in sufficient quantity on a consistent and reliable basis was also listed as a constraint. Timely delivery of local foods, as well as billing and invoicing issues were also mentioned as constraints to purchasing local foods. Actually, 88% of restaurants reported cost as a constraint to purchasing local food, with 25% stating availability. Reliability and demand were also mentioned as obstacles to buying locally, along with the additional obstacles illustrated in Figure 7.

To summarize, 60% of the restaurants in the watershed participated in the food assessment. Most serve 90% of food prepared from scratch that includes fresh ingredients and almost all report to serve some local food. Of the local food served, only a third of it comes from producers within the watershed. Almost all restaurants are interested in serving more local foods and most have patrons expressing an interest in local foods, though only half feel patrons would pay more for local foods. Almost all restaurants are interested in local source for organic foods and most are willing to pay more for them. Restaurants use hundreds and thousands of pounds of locally viable foods each month during winter and summer seasons. Restaurants are interested in purchasing most all foods that are locally viable, though availability and cost are the primary obstacles. Other obstacles include consistency, quality, and quantity. A reliable delivery and billing system for local foods is necessary. Most restaurants have flexibility in their choice of suppler, but find current ‘local’ distributors more costly. Half of restaurants are served by Sysco, who is the primary distributor, though US Food Service and Sysco deliver an average of about 60% of any given restaurant’s foods. Most restaurants receive less than a quarter of their foods from any given distributor.

**Conclusion of Assessment**

The San Miguel Watershed Community Food Assessment surveyed the various components of our local food system, from production to consumption, to determine what is needed to make it more functional and sustainable. It was found that a centralized local distribution system providing more locally grown food is of foremost interest to the consumers, farmers, ranchers, grocers, schools and restaurants surveyed in the San Miguel Watershed. Two key issues paramount to achieving this goal for all entities are consistency in the availability of locally produced foods, and maintenance of overall cost for consumers and producers. Data collected shows that a local food co-op or a more permanent farmers market would be utilized. Currently, locally grown foods are purchased in small amounts by 2/3 of local restaurants and comprise an average of 4% of products purchased by local grocers. Yet, it was reported that almost half of the local grocers, restaurants and schools are equipped with the flexibility to pay slightly higher prices to obtain local foods. Most restaurants in the area prepare their meals from scratch and include fresh food, as well as serve some locally produced food. Just examining restaurants alone, when combined they could be utilizing tens of thousands of pounds of foods that can be grown locally each month in both the winter and summer seasons.

It is evident that the overall consumer climate is leaning towards inclusion of high quality, locally produced foods in their shopping routine. Current consumer shopping habits indicate that the demand for local products already exists with 1/4 of consumers shopping at farmers’ markets in the summer, always purchasing food produced in Colorado, and shopping at Natural Foods Grocers in the winter. About half of consumers often buy food labeled organic and produced in Colorado. Most consumers shop at their local grocer year-round and want to see more locally grown food offered. Consumers report that the primary limitation from purchasing healthy, fresh food is availability and price. Indeed, over the last year food prices have increased for all entities leaving consumers feeling that the food available is generally unaffordable.

Currently, farmers and ranchers within the San Miguel Watershed produce most meats (except fish), a large variety of temperate vegetables, several fruits, herbs, and two types of grain; while almost 1/3 of those farmers are using only a quarter of their land and almost half are using less than 50% of their land. This leaves many with both the desire and the means to increase production acreage, diversify product variety and boost the overall output of locally produced foods. Increasing production of local foods will not only satisfy consumer demands, but will also create jobs for locals in marketing, storing, processing, and distributing local products. Greenhouses and commercial kitchens in the watershed are under-utilized and an ample storage potential exists in the Deep Creek Mine near Telluride. The cost in fuel and time transporting local goods to be processed in another region is a detriment to local merchandising that could be alleviated with the development of a localized distribution system. A distribution system with an infrastructure made up of local producers, processors, distributors, and market support is essential for farmers and ranchers to connect to local markets. Such a localized distribution system and some assistance with land and water access, cost and credit, marketing and market support are needed to strengthen local agriculture. Local producers support the creation of a producer’s cooperative, which will expand the utilization of local expertise, labor, land, equipment and infrastructure and help cut costs.

After spending the last year talking to producers, consumers, and food retailers in the region, it is apparent that there is amazing potential and a unique opportunity to build a strong and mutually beneficial local food production and distribution system within the San Miguel Watershed. Farm-to-School and Farm-to-Chef programs are wanted by consumers, as well as food co-ops, food buying clubs, community gardens, gardening education, and community greenhouses. Many local producers want to merchandise locally. Local restaurants are interested in serving more locally produced foods, provided they are reasonably priced and can by reliably delivered. Agricultural programs in schools and school gardens would educate future residents in the maintenance of a sustainable food system. Local schools (less than half of which currently access local food production) will need only a bit of extra storage space and processing equipment to prepare meals using locally produced foods; instilling a foundation in our youth that will enrich the lives of the community inside and out. It is time to develop a localized distribution system to enable sustainable food production within the communities of the San Miguel Watershed.

**Appendix I: Resources for Local Food System Development**

|  |
| --- |
| * Alliance for Sustainable Colorado, [www.sustainablecolorado.org](http://www.sustainablecolorado.org/) |
| * Alternative Farming Systems Information Center, [http://afsic.nal.usda.gov](http://afsic.nal.usda.gov/) |
| * Chefs Collaborative, [http://chefscollaborative.org](http://chefscollaborative.org/) |
| * Children's Farm Camp, [www.prairiecrossing.com](http://www.prairiecrossing.com/) |
| * Colorado Community College System, [www.cccs.edu](http://www.cccs.edu/) |
| * Colorado Farm to School Programs, [www.farmtoschool.org](http://www.farmtoschool.org/) |
| * Colorado Organic Producers Association, [www.organiccolorado.org](http://www.organiccolorado.org/) |
| * Colorado State University Extension, [www.extension.colostate.edu](http://www.extension.colostate.edu/) |
| * Eatwild, [www.eatwild.com](http://www.eatwild.com/) |
| * Environmental Quality Incentives Program Support for Organic Growers |
| [www.nrcs.usda.gov/Programs/eqip/organic](http://www.nrcs.usda.gov/Programs/eqip/organic) |
| * Farm Fresh, [www.farmfresh.org](http://www.farmfresh.org/) |
| * Governor's Forum on Colorado Agriculture |
| * Grower's Organic, LLC, [www.growersorganic.com](http://www.growersorganic.com/) |
| * Landshare Colorado, [www.landshreco.org](http://www.landshreco.org/) |
| * Local Harvest, [www.localharvest.org](http://www.localharvest.org/) |
| * Marketing Local Foods to Gourmet Restaurants |
| [www.joe.org, Article Number 6RIB2December 2008, Volume 46 Number 6](http://www.joe.org/) |
| * Sustainable Agriculture Research and Education Program, [www.csrees.usda.gov](http://www.csrees.usda.gov/) |
| * Roaring Fork Edible Schoolyard, Jerome Osentowski, Director, jerome@crmpi.org, 970-927-4158 |
| * San Miguel Watershed Coalition, [www.blm.gov](http://www.blm.gov/) |
| * Slow Food Western Slope, [www.slowfoodwesternslope.org](http://www.slowfoodwesternslope.org/) |
| * Sustainable Communities Network, [http://sustainable.org](http://sustainable.org/) |
| * Sustainable Table, [www.sustainabletable.org](http://www.sustainabletable.org/) |
| * Valley Organic Growers Association, [www.vogaco.org](http://www.vogaco.org/) |

**Appendix II: Consumer Survey Comments**

Other problems or concerns regarding food in the San Miguel Watershed?

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| --- | --- |
| 1 | “A short growing season and other climatic realities.” |
| 2 | “All of our grocery stores carry the same basic foods and are supplied primarily by the same source (Western Family). We have many farmers and ranchers here, but most of their product leaves this area.” |
| 3 | “Area “truck farms” need to be encouraged. Competition from other areas could make those uneconomical to operate. Food buying co-ops would be useful.” |
| 4 | “Bulk or program food like commodities, local instead of 25 miles away and unavailable to most locals on limited budgets. Ranch to table projects that work with the local producers of beef to provide affordable meat to the local area.” PLEASE PRINT RESULTS IN LOCAL PAPER” |
| 5 | “Clarks Market is the worst for fresh foods!” |
| 6 | “Cost of living shouldn’t really impact your ability to eat well if you plan ahead and look for sales, and shop carefully, you can still eat fairly well on a low budget. Thanks, Bodie!” |
| 7 | “Do not garden but like to buy it if convenient access, distance, shopping carts” |
| 8 | “Education is very important regarding food choices. Refined and highly processed foods can cause many health issues. Newspaper articles and or columns with recipes or information would be helpful.” |
| 9 | “Educational opportunities for learning about nutrition and the current state of food production in the country. How can we vote with our dollar to change our current problems of toxic overload on food, importation of food, unnecessary packaging of produce and the precious nature of enjoying a healthy, slow meal?” |
| 10 | “Erik- Here it is. With cost of living going up for everyone, including meat and vegetable farmers, can they produce enough food AND sell it at a price point competitive with say, a City Market? I hate to say it but if I can get two heads of lettuce at City Market for the same price as one at Norwood farmers market, for survival of my family and existence I have to get two for the price of the local one. If wealthy or good steady job with cash surplus, then local farmer supports is a no-brainer. OR can we grow local food AND sell it at a price where [poor] can easily see the competitive price and buy local. Bottom line= farmer’s market price too high for low-income families. Thanks for your efforts!!” |
| 11 | “Everyone, including doctors and the government say you should eat well. Great! But we can’t afford the cost of good organic food. Also, it would be good to have some local restaurants that don’t do grease-based cooking. It’s too expensive to go out for nice food!” |

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| 12 | “Farmers Market is too expensive in Telluride so don’t shop there. The town should not charge expensive fees to the vendors & try to make money off of the Farmers Market. The town should provide it as a service without the high fees to keep the prices down.” |
| 13 | “Farmers’ market is VERY expensive!! So, I stopped shopping there. Would love to see a place to give extra produce for free distribution to community. How many zucchini can you eat, after all?? I have lots of extra produce that goes to waste.” |
| 14 | “Food labeled organic is almost always priced higher, apparently for the label. I find this wrong because nutrition goes to those who have more money. It is much more expensive to feed my children salad than it is to feed them an instant-less nutritious- meal.” |
| 15 | “Food safety training for local and farmer’s market participants: as a consumer, I’d like to know that producers are aware of safe food handling standards & practices.” |
| 16 | “Food share Churches to be able to get fresh fruits and vegetables that will be good by the time I get home. I would like more frozen fruits and vegetables because they keep better. I have to depend on two churches to have enough food for the five of us. Without the food I get from them, I would not have enough food. Milk is hard to have enough money for and when it is on sale at Clarks I buy extra and freeze some of it. Our garden growing season in dry creek is only about 4 months.” |
| 17 | “Fresh, local produce more available, please.” |
| 18 | “Get (county) + (State) + (federal) out of my back pocket. County peoples the most.” |
| 19 | “Growing food local organic in Mountains.” |
| 20 | “Having a water problem to meet the needs of growing crops. Using water wisely.” |
| 21 | “Having any after paying bills to town of Naturita that are way too high. Now and having to pay them more just because we are poor and can’t pay the high price for water and waste now so they raise the price even more. Most of the people can’t live as it is. We sure as hell don’t need to have to pay more when we can hardly pay what they want now! IT’S JUST WRONG! Needs to be fixed.” |
| 22 | “I am a firm believer in purchasing organic, natural, and locally whenever available and affordable. This, if attainable, lends to our overall mental and physical health but also helps bolster local economy, community involvement, and gives a sense of control over our intake. Generally outside communities like ours, that has a tendency to be a little more active, involved and aware, the country has slipped into over indulgence of cheap, processed, empty caloric meals that has led to obesity and ill health. In my mind this has become, outside the obvious health issues, economic, political, and survival issues.” |
| 23 | “I am concerned that the cost of distributing locally grown foods will be borne by the farmers, rather than the restaurants and customers. I don’t mind paying more for high quality foods.” |
| 24 | “I am very concerned about the ability of immigrants to eat healthy organic foods. When they have to shop at Clarks or drive to Montrose it’s too expensive, so they eat Ramen noodles & Pizza Rolls.” |
| 25 | “I appreciate the initiative you are taking and look forward to seeing the results.” |
| 26 | “I do have concerns that the organic food I do purchase is not actually organic and that I’m wasting my money.” |
| 27 | “I don't feel our school lunch programs provide adequate healthy food choices. They contain too much salt, fat, processed food, and white flour products. They do not have enough green vegetables, fresh fruits and vegetables, and whole grains. I would love to see a farmer's food market &/or coop. in the Nucla/Naturita area with locally grown foods. I'd be willing to pay more for organically grown products. I don't like driving to Norwood farmer's market for foods because the added energy consumption defeats the purpose.” |
| 28 | “I have Celiac disease which means my diet is limited. Local stores do have a few items on their shelves now that are gluten free and of good quality; however, they are 30% more expensive than what I pay at Wal-Mart or Vitamin Cottage. Unfortunately this means I have to travel 100 miles to access good quality, reasonably priced gluten free food. I should not have to drive 100 miles to access affordable gluten free food. We have a large extended family, grown children with families, who come for dinner quite often. Due to the cost of the gluten free items we have to cook 2 separate meals, 1 for me, and 1 for the family. My gluten free meals for one cost as much as their regular meals for 6 if I purchase mine here. This should not be the case. I would like to have a gluten free co-op for those of us in the community that are gluten free. I know of several in Nucla and Naturita who would utilize the program. This would reduce prices on our specialty items and would bring educational information to the community about Celiac disease and Gluten Intolerance. It would also be nice if the local restaurants had a gluten free portion on their menus.” |
| 29 | “I think that if we convinced locals and visitors to shop for food locally more, we might be able to influence grocers to reduce prices because of competition and volume.” |
| 30 | “I would like to buy more locally raised food, especially if price was not much higher. Could meat be like eggs, just gotten where raised? Guess not.” |
| 31 | “I'd like to know more, please do email me.” |
| 32 | “It can be so expensive!” |

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| 33 | “Items purchased in local grocery- veggies, dairy are at their expiration date before they are put on the shelves. There are enough people in the area to support a larger more modern grocery. Larger chains can offer lower prices and specials.” |
| 34 | “It's going to become a struggle for many others as the recession continues. So many lost jobs.” |
| 35 | “Keeping it price affordable - farmers market is too expensive and in reality one can only spend so much money to feed their family.” |
| 36 | “More gluten free and natural foods available at our local markets (Clarks market in Norwood is great, but too far away from my home).” |
| 37 | “Need another market so we can have competition and better prices. Asking for our race should not matter- we're all human and putting us into "races" is nothing more than discrimination!!” |
| 38 | “Need greater quantities produced here, climate and soil are ideal for wheat what about a mill to grind flour (grain into flour or meal?). How could fresh vegetables (locally grown) be available year round, best solution I know of is home canning/ freezing: they taste fresh, anyway!” |
| 39 | “No, but I really appreciate your doing this. Thank you!” |
| 40 | “Not aware of problems.” |
| 41 | “Old fruit and veggies in store! Not big enough store to support variety, esp. of diabetic foods! |
| 42 | “Only the cost of food at Markets.” |
| 43 | “Organic food is too expensive.” |
| 44 | “People think food is the last thing you spend your money on. I believe it's the 1st and most important. I would love to see programs like Bountiful Baskets or Home Organics like the larger cities have.” |
| 45 | “Price dictates the food we eat each week.” |
| 46 | “Prices are pretty high at the farmer's markets, hard for growers (and consumers) to pay for a distribution entity. The distributor would have to have a refrigerated van/ truck. But what a great idea to deliver meat & eggs & veggies & fruits to telluride. However, what happens when those things aren't in season? Also, My complaint about organic is the cost to the grower for that label "organic". I'd believe my neighbor if they claimed to be organic without being certified.” |
| 47 | “Priorities: Need reasonably priced, organic, bulk foods (dry goods). Expand access/market availability of local/organic/regional foods. As we develop AG resources regionally, I want more focus on organic enterprises. What happens to all the food that is left over in rental homes & condos when they are cleaned???” |
| 48 | “Processed frozen and packaged foods are readily available and affordable in outlying areas. I feel it promotes a bad diet for a lot of folks because it's low cost and has lots of flavor. Frozen pizza etc. Produce is very expensive and bruised, without a lot of variety. It takes patience and creativity to stay eating well and affordable in these small rural towns in the winter and spring. Farmers’ Market produce is also expensive! THANK YOU!” |
| 49 | “Radioactive dust from the West End and heavy metals in the water from the mines in Telluride.” |
| 50 | “Reclaim the tailings-contaminated parts of the Valley Floor with mushrooms, and set up Valley Farms community greenhouses!” |
| 51 | “So what are we looking at? Food shortages, transportation problems, what is the government expecting? Is this paid for by a government? Hope not! This seems pretty scary maybe if this is government we should look at jobs??” |
| 52 | “The "farmers" market in the area are seriously lacking, I understand the reasons for this but Telluride FM is nothing more than a yummy meeting place for the rich and completely useless and inappropriate for working people to BUY FOOD. (I still love it though). Norwood FM is nice but tiny- with some faithful vendors but not a whole lot of variety and is usually packing up by the time I get there. I hear Montrose has a really good one but with gas prices well... I have to work when it is there, sometimes. A place to buy locally produced meats, cheese, butter, and or bulk grains, flour, beans would be wonderful.” |
| 53 | “The ability for our community to be able to afford food for our families. When I have visited a food bank the lines are so long it makes you wonder what it would take to get everyone the food and money they need. The west end of Montrose county is mostly forgotten when it comes to help for those of us who are suffering.” |
| 54 | “The cost of food at the Norwood market is horrendous!! We only shop there for last minute needs. We traveled 65 miles one way every week to stock up on food for a cheaper price, which also increases the amount of money we spend on gas.” |
| 55 | “The CSU extension office provides good info on growing food if people would just use them.” |
| 56 | “The distribution issues....and what are people willing to pay for distribution from local farms. In addition, what percentage more am I willing to pay in order to support my local farmer? My ability or future desire to use the internet to order food or communicate with farmers, to take out the middle man. Maybe another question about how important it is to people to eat seasonally? Lastly, (sorry), but see if there is an interest in learning about storing food for winter (canning, drying, ect.). Thanks so much for doing this, it is a great step.” |

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| 57 | “The food available locally is understandably more expensive, but is generally of poorer quality (damaged/ wrinkled fruit and vegetables), and there is a limited selection compared to stores in Montrose and GJ.” |
| 58 | “The growing season is so short that the food that could be grown here is minimal.” |
| 59 | “The Naturita and Nucla stores have a severely limited produce selection. Variety is low and quality is low.” |
| 60 | “The quality of shelf life stores use. They leave fruits and veggies out on shelf until molded, seeded, or just plain bad and still expect us to buy them. Meats are soured, very fatty, and come in such small amounts. Sometimes you have to spend more to buy more just to make it. The stores' response: "that's what they send us".” |
| 61 | “The stores around here do not offer enough fresh fruits and vegetables, and at a reasonable cost. The meat selection is very poor and expensive, and there are not enough healthy meal selections in the store.” |
| 62 | “There seems to be very little locally grown produce available and no meat that is from local ranchers. Would love to have local meat because it would not have growth hormones in it. Thank you for doing this!” |
| 63 | “This was a great survey, Bodie. I am 150% for doing whatever I can to contribute to the solution.” |
| 64 | “Too much chemicals being used throughout the county. Weed kill being used and being carried by the wind to organic farms. Weed kill sprayed on the sides of the roads and in creeks and rivers. Little participation, by the public, at "Farm Markets".” |
| 65 | “Transporting foods to this mountain region gets all of our food priced higher. If we can produce what we use we can change the way food/commodities are transported. I would like to be independent of trucking shipments and the prices that go with it.” |
| 66 | “We have no other transportation available besides our personal vehicle. Sometimes our friends bring us food from the food bank.” |
| 67 | “We moved here from Eastern Colorado where we had easy access to organic Western Colorado produce. We found it much more difficult and sometimes more expensive to buy organic Western Colorado produce here in Montrose. The Farmer's Market has been great, particularly Straw Hat Farms. And, the winter Farmer's Market was a real blessing. We would truly appreciate an effort to keep our local food local.” |

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| 68 | “We need new restaurants, and of course cost of living affects our ability to eat well, we need jobs here!” |
| 69 | “We would like to be able to purchase local beef, retail, in small quantities at Clark's market.” |
| 70 | “What can we do about water conservation to assure that our ranchers and farmers will have enough in the drought years? What will the county do to protect our ranchers and farmers from GMO products like corn and alfalfa? How will the uranium mill affect organic growing practices in the Paradox Valley?” |
| 71 | “What pesticides or fertilizers that have been used- how far away, haven't made it to Norwood.” |
| 72 | “While Telluride is a remote location and real estate prices are high (rent) - food costs versus selection is very expensive. Given we need supplies in Montrose or Grand Junction the cost savings far outweighs the gas cost. We avoid going to save gas at every whim but we do plan our trips and make a day to run our errands, etc.” |
| 73 | “Wish for more restaurants, hope to keep control of our water rights. Lower prices at local grocery, better produce.” |
| 74 | “Would be nice to see food stands in these areas, lower price on food.” |
| 75 | “Wouldn't it be great to be able to market some of those beef cattle locally?” |

**Appendix III: Farmer/Rancher Survey Comments**

What do you think is the most significant factor that contributes to agriculture thriving in this region?

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| --- | --- |
| 1 | “Value of product” |
| 2 | “Devoted grocers” |
| 3 | “Altitude” |
| 4 | “Family operations” |
| 5 | “More help from local agencies” |
| 6 | “Water” |
| 7 | “Economy” |
| 8 | “Love of the land” |
| 9 | “We have the land and light for farming” |
| 10 | “More people are trying to make their produce available at the farmers market” |
| 11 | “Water” |
| 12 | “Good climate, knowledgeable people” |
| 13 | “Knowledge of local food and how good it is for you” |
| 14 | “Good land” |
| 15 | “It's a historical use of the land, water and soil resources” |
| What are the main barriers to or disadvantages of selling locally?   |  |  | | --- | --- | | 1 | “Time it takes to sell | | 2 | “Cost” | | 3 | “The Market for beef are to feed lots. No big feedlots in our area” | | 4 | “Lower price” | | 5 | “None” | | 6 | “Advertising” | | 7 | “None” | | 8 | “West End people do not believe in good food or organics. Most believe in cigarettes meth and food that someone else cooks. Most West enders never eat meals at home” | | 9 | “None” | | 10 | “Usually home grown products are too pricey for a growing family” | | 11 | “Marketing” |   Is there anything else that you think would keep you from farming/ranching in this region?   |  |  | | --- | --- | | 1 | “Climate change” | | 2 | “No” | | 3 | “Loss of land leases” | | 4 | “It's a lot of commitment to buy all the necessary equipment to get the crop in and secure” | | 5 | “Regulations” | | 6 | “No” | | 7 | “Cost of land” | | 8 | “Uranium mill” |   What do you think is the most significant factor that contributes to agriculture struggling in this region?   |  |  | | --- | --- | | 1 | “Lack of profit” | | 2 | “Inability to get land based credit” | | 3 | “Poor markets & transportation cost” | | 4 | “Altitude” | | 5 | “Profit and water” | | 6 | “Not enough help from those agencies” | | 7 | “Good market” | | 8 | “Economy- regulations- marketing” | | 9 | “Local economics ie. recreation construction and mining jobs” | | 10 | “We also have chemicals and weed killers that most farmers will use first. Also, town water is heavily chlorinated” | | 11 | “Water shares” | | 12 | “Dry hard land / not enough moisture / water” | | 13 | “Non-affordability of land and water” | | 14 | “Altitude, short growing season, it's not sunny south Florida” | | 15 | “Too much input” | | 16 | “The federal and local layers of regulations, water shortage” | | 17 | “No young farmers taking over” | | 18 | “Marketing on the part of the producers” | | | | |

What do you think can be done to encourage a stronger and more dependable local food system?

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| --- | --- |
| 1 | “Colorado Provisions” |
| 2 | “Keep costs down” |
| 3 | “More water to raise more hay, grain and garden items” |
| 4 | “This program” |
| 5 | “Awareness and making products available” |
| 6 | “It's not going to happen. Save your food and eat it yourself” |
| 7 | “More help with advertisement” |
| 8 | “More participation, affordability of natural feeds, more commitment from the general populace” |
| 9 | “Support from local restaurants and markets. Local support. People have to gain knowledge of the food that is grown locally and how good it is for them.” |
| 10 | “Educating the public on the benefits of local products and how the money benefits the community by staying in the community” |
| 11 | “Beef packing plant” |
| 12 | “?” |

What would you say are the advantages of selling locally?

|  |  |
| --- | --- |
| 1 | “Ease of transport” |
| 2 | “Basically a good idea” |
| 3 | “Less use of fossil fuels to get product sold. Sell locally act globally” |
| 4 | “Don't have to haul lambs to Cortez” |
| 5 | “Freshness- support” |
| 6 | “Costs” |
| 7 | “Not many because most locals don't want to participate” |
| 8 | “Yes, less transportation costs” |
| 9 | “No middle man, filling a niche locally, satisfaction, being able to turn a dime at home” |
| 10 | “Lower transportation costs. True quality egg appreciation” |
| 11 | “Less input” |
| 12 | “Save freight charges and the middle man. Superior quality beef that we raise would bring better prices” |
| 13 | “Delivery of hay, support local ranchers” |
| 14 | “Connecting local folks w/ their land & w/ where their food is grown. Convenience is also a big factor” |

**Appendix IV: Restaurant Comments**

What needs to happen to improve the area’s current local food system in order to meet your needs?

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| 1 | “I would love to be able to do more locally. If you can tell me how I'm all ears. I haven't had much success going directly to the farmers themselves.” |
| 2 | “We are very small- small budget- 3 times a week delivery and reliability- we order small- pay small and do fair business- come in for breakfast.” |
| 3 | “For me it’s a matter of planning my ordering so that I have a consistent product, good pricing, and so that I don't make any more work for my staff than necessary. I would like to see more deliveries per week. At least 2-3 which would work with our available storage. Someone should offer to buy Red Hat and make this a reality or find or build something in Montrose.” |
| 4 | “The challenges are trying to remain open in an area with a very low population and low income. There needs to be something done to bring back the economy.” |
| 5 | “Cost of operations for a large restaurant with a lot of fixed costs make it challenging to price food fairly to the customer, when it’s local and/or organic. More products within 100 miles would help bring prices down.” |
| 6 | “I think there is a great opportunity for local foods in this area given the agricultural abundance of good growing. It takes effort on both sides to push it. Good news is people are willing and pay more or local food. I would buy if consistency and was more organized.” |
| 7 | “Trying to run a profitable business is very difficult in a small, isolated, depressed economy. I want very much to support local foods - and I do - but I cannot be a "purist". I must, for now, depend on Sysco to bring me cheaper foods in large quantities. I hope to use more local foods in the future and my plans are to use my business as an outlet for local foods when Farmer's Market is not running.” |
| 8 | “The prices need to come down from what I see at the Telluride farmers market. We need delivery at least 2 days a week. The supply needs to be able to meet our demands.” |
| 9 | “A list and prices of what's available with guaranteed delivery.” |
| 10 | “AFFORDABILITY, REILABILITY, CONSISTENCY FOR MY MENU DOES NOT CHANGE MUCH.” |

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| 11 | “I would have like to have seen Red Hat take on a leadership role and perform certain tasks with local growers / ranchers ect, and help create a system where they are doing what it appears you are wanting to do. That would include... 1. Conducting a survey, understanding what is needed and what can be accomplished locally in the area of local food production. 2. Help farmers / ranchers borrow, build facilities to do this. 3. Market these products. 4. Transport, store and distribute product. 5. Help local producers with education of and financial issues.” | | |
| 12 | “Farms, irrigation, processing plants...” | | |
| 13 | “Year round availability with more variety and production.” | | |
| 14 | “Try to get consistency and price down. I think if I had a product guide offered to me with weekly prices I would buy more from local distributors, I however do not have time to buy a couple of items from 20-30 distributors. I want and would love to put the effort into buying local.” | | |
| 15 | “More networking, storage and distribution. Red Hat could step up and stop trying to compete with Sysco.” | | |
| 16 | “I feel like if they were able to jump on the backs of larger corporations like Sysco it would help smooth out the process.” | | |
| 17 | “Cost of business is too high to expand food cost as well. Consistency of availability-quantity, eggs for example.” | | |
| 18 | “First I need to talk to who takes care of the local so I can talk to the patrons.” | | |
| 19 | “Farmer's need to run their business just like everyone else. We all live in a really expensive place with an eight month economy and face a lot of challenges running our businesses. I don't think there needs to be a lot of discussion of, God forbid, government involvement. We need a good product, consistently available, at a reasonable price. Each farm/business owner needs to do what it takes to make it work. While we would pay a little extra and go out of our way a little to make it happen, we don't have a lot of extra time or money to help someone else run their business.” | |
| 20 | | “Exposure, education - locals need to understand all the benefits of eating local foods - and that these benefits are worth the higher price.” | |
| 21 | | “Awareness of what is available.” | |