



# Yolo Food Hub Buyer Survey Report - Executive Summary

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# Executive Summary

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This Yolo Food Hub Buyer Survey (“Survey”) was conducted to gather specific information for the optimal creation of an effective and efficient food hub facility combined with an array of valuable services for both producers and consumers. The Survey was made up of a series of multiple choice and short answer questions. Yolo Food Hub is a new facility that will aggregate, process, store, and distribute farm produce grown in Yolo County and surrounding areas. Located in Esparto, Yolo Food Hub will expand food production and develop new market opportunities in Yolo County and the Greater Sacramento Region, while at the same time bolstering local food security, increasing employment and job training opportunities, and providing pandemic relief for farmers, consumers, and institutional buyers.

A wide array of institutional buyers, including schools, colleges, universities, hospitals, food banks, restaurants, grocery stores, etc. across several Northern California counties were asked to participate in a confidential on-line Survey to help measure their interest in the development and procurement of products from a Food Hub in Esparto, Yolo County. The Survey included questions about buyers’ experience on a wide variety of relevant topics. A total of 25 responses were received from over 100 Surveys emailed to potential respondents across the region.

Items on the Survey were worded as positive statements or direct questions, and included the following measured topics, including several sub-topics:

- Type of Buyer
  - School, college, healthcare facility, hotel, restaurant, grocery, etc.
  - Where is the food you purchase being served?
- “Buy Local” Requirements and Existing Food Purchasing Process
  - Where are you currently buying product?
  - Could you benefit from “local” procurement training?
- Product Demand
  - Fresh commodities and/or processed products?
  - What do you buy from local sources?
- Potential Services Provided by Yolo Food Hub
  - Food safety and handling requirements?
  - Packing and packaging requirements?

## Methodology

The Survey forms and questions were developed with input from the Yolo Food Hub Network team and partners, including the Capay Valley Farm Shop, Spork Food Hub/Fiery Ginger Farm, Yolo Food Bank, Kitchen Table Advisors, and Valley Vision.

The final Survey form asked respondents/buyers a series of quantifiable questions (31) related to their procurement operations and potential product needs. Respondents were requested through email invitations to complete the on-line questionnaire via *Survey Monkey* and to submit their answers electronically. Several follow-up emails were sent, and phone calls made to remind respondents to complete the Survey.

The Survey administrator checked returned Surveys for missing information and responses that would cause scanning errors. After scanning, the Survey responses were imported into *Microsoft® Excel* and errors were checked against the individual Survey forms. Data analysis was completed using *Excel*.

## Summary of Results

Survey responses are broken out by specific categories, as follows:

- ***Type of Establishment that purchase food***
  - 40.9% of respondents were K-12 schools.
  - 8.0% of respondents were colleges or universities.
  - 4.5% of respondents were Tribal-owned casinos.
  - 22.7% of respondents were grocery stores or grocery chains
  - 9.0% of respondents were food banks.
  
- ***Location of where food purchased is being served***
  - The majority of respondents/buyers are located in Yolo County (34.8%), Placer County (30.4%), and Sacramento County (26.0%)
  - A second tier of respondents/buyers are located in Northern California, including Solano County (17.4%), San Mateo County (17.4%), Alameda County (13.0%), Colusa County (13.0%), Contra Costa County (13.0%), El Dorado County (13.0%), Nevada County (13.0%), San Francisco County (13.0%), Santa Clara County (13.0%), Sutter County (13.0%), and Yuba County (13.0%).
  - A third tier of respondents/buyers are located in Napa County (8.7%), San Joaquin County (8.7%), Sonoma County (8.7%), Lake County (4.4%), and Mendocino County (4.4%).
  - A last tier of respondents/buyers are located in the Tahoe Basin/State of Nevada (8.7%) and Southern California (8.7%).
  
- ***“Buy Local” Policy***
  - On average, 77.3% of respondents/buyers have a “Buy Local” policy, and only 22.7% do not.
  - However, all respondents that do not currently have a “Buy Local” policy would buy more locally grown products if available.
  - Those respondents/buyers that currently buy “local” products procure those through local food distribution companies (63.4%), direct from growers (54.5%), national food distribution companies (36.4%), and directly from food hubs (27.3%).
  
- ***Existing challenges to purchasing local products***
  - 59.0% of respondents/buyers cited finding product at desired price point as their main challenge; 50.0% of respondents/buyers cited the cost of local food as a challenge; 45.5% of respondents cited finding suppliers with required certifications (e.g. GAP, etc.) as another major challenge; 36.4% also noted the lack of sufficient volumes of locally grown food as an ongoing challenge; 36.4% cited the lack of sufficient handling of product ( e.g. transportation, cooling, storing, etc.); 31.8% cited knowing how to procure directly from local farms; 22.7% noted seasonality of locally grown food; 18.2% cited contracting with local growers as a barrier; 13.6% cited difficulties in communicating with local growers; 9.0% cited lack of diversity of locally grown products; and 9.0% cited local, state, and federal policy and/or regulatory requirements as a barrier.

- ***Useful Food Hub Services***
  - 75.0% of respondents/buyers believe that they could benefit from *local procurement training* to implement menu/food offering planning, purchasing, and preparing locally produced seasonal products supplied by the Yolo Food Hub. Moreover, 89.5% of respondents/buyers would utilize these types of services if the Yolo Food Hub Network provided them.
  - 88.9% of respondents/buyers would also be willing to encourage or require their staffs to order from a *local products availability list* from the Yolo Food Hub Network.
    - Additionally, 79.0% of respondents/buyers currently retain some level of *pricing tolerance* for locally sourced products.
  - 77.8% of respondents/buyers have interest in the Yolo Food Hub Network providing *market readiness training for local growers* less experienced in selling wholesale.
  - 56.3% of respondents/buyers would be willing to *forward contract* for locally grown products from the Yolo Food Hub Network.
  
- ***Types of products currently being purchased***
  - On average, 100.0% of respondents/buyers buy fresh fruits and vegetables.
    - 60.0% procure minimally processed fresh fruits and vegetable (e.g., washed and cut).
  - On average, 75.0% of respondents/buyers procure grains.
  - 65.0% purchase dairy products.
  - 60.0% purchase frozen fruit; 55.0% purchase frozen vegetables.
  - 55.0% purchase fresh meats and/or poultry.
  - 55.0% purchase eggs.
  - 40.0% purchase nuts.
  - 40.0% purchase baked goods,
  - 30.0% have an organic preference.
  
- ***Types of products currently being purchased from locally grown sources***
  - On average, 90.0% of respondents/buyers purchase fresh fruits and vegetables from locally grown sources.
    - 40.0% of respondents/buyers purchase minimally processed locally grown fruits and vegetables.
    - 15.0% of respondents/buyers purchase locally produced frozen fruit.
    - 10.0% of respondents/buyers purchase locally produced frozen vegetables.
  - 40.0% of respondents/buyers purchase fresh meats and/or poultry from locally grown sources.
  - 35.0% of respondents/buyers purchase locally grown dairy products.
  - 30.0% of respondents/buyers purchase locally grown grains.
  - 20.0% of respondents/buyers purchase locally grown nuts.
  - 20.0% of respondents/buyers purchase locally grown eggs.
  - 20.0% of respondents/buyers purchase locally produced baked goods.
  - On average, 10% of respondents purchase no locally grown products.
  
- ***Food safety requirements***
  - On average, 50.0% of respondents/buyers require GAP, USDA Harmonized GAP Plus + Audit, and/or Good Hygiene Practices (GHP) Certified.
  - 50.0% of respondents/buyers require USDA certified meat.
  - 38.9% of respondents/buyers require Offer Traceability documentation.
  - 33.3% of respondents/buyers require on-farm food safety plan.
  - 27.8% of respondents/buyers require that processed products must come from certifies commercial kitchen.

- 27.8% of respondents/buyers require that producers pass an on-farm audit.
  - 27.8% of respondents/buyers require other third-party certifications.
  - 11.1% of respondents/buyers require transport certified by federal inspector.
  - 16.7% of respondents/buyers require no certifications.
- ***Packing and packaging requirements***
    - On average, 57.9% of respondents/buyers require maintenance of cold chain.
    - 52.6% of respondents/buyers require that product meet their internal quality standards.
    - 47.4% of respondents/buyers require labeling for tracking purposes.
    - 43.1% of respondents/buyers require USDA grading standards.
    - 26.3% of respondents/buyers require that product packaging meet their internal specifications.
    - 21.0% of respondents/buyers require bulk containers.
    - 15.8% of respondents/buyers require recyclable or reusable food containers (UFC).
    - 10.5% of respondents/buyers have no requirements.
- ***Population served***
    - On average, 64.0% of respondents/buyers serve k-12 children.
    - 53.0% of respondents/buyers serve low income or high-risk individuals.
    - 19.0% of respondents/buyers serve the elderly.
- ***Willingness to purchase locally grown products from Yolo Food Hub Network***
    - **100.0% of respondents/buyers are willing to purchase all or some of their requirements from the Yolo Food Hub Network.**

## Conclusions

The Yolo Food Hub Buyer Survey produced some informative results. The Survey received twenty-five responses, which was a highly positive response rate of 25.0% (out of 100 invitations to respond). This compares favorably to the commonly accepted average response rate to external email surveys of between 10% to 30%.<sup>1</sup> This high response rate is an indication of the interest and need for the Yolo Food Hub Network. More specifically, 100% of the twenty-five respondents indicated a strong interest in purchasing locally grown products and utilizing the services of the Yolo Food Hub Network.

Although respondents/buyers skewed heavily towards K-12 schools (40.9%) and higher educational institutions (8.0%), there was also a wide array of interested respondents/buyers from grocery stores, food banks, and Tribal-owned casinos. Buyers also spanned a broad area of Northern California locations, including over 19 counties, plus Southern California and parts of the State of Nevada. Respondents/Buyers also are currently procuring a wide range of commodities, including fresh and processed fruits and vegetables, nuts, grains, meats, poultry, dairy, eggs, and baked goods. Additionally, and to a lesser extent, respondents/buyers are buying these commodities from locally grown and processed sources.

Currently, a large majority of respondents/buyers (77.3%) have some form of “Buy Local” policy and purchase their food requirements from a range of local and national food distribution companies, direct from growers, and existing food hubs. However, most buyers experience challenges when purchasing locally grown products, including desired price point; cost of local food; finding suppliers with required certifications (e.g. GAP, etc.); the lack of sufficient volumes of locally grown food; the lack of sufficient handling of product ( e.g. transportation, cooling, storing, etc.); the

<sup>1</sup> <https://www.genroe.com/blog/acceptable-survey-response-rate-2/11504>

lack of knowing how to procure directly from local farms; the seasonality of locally grown food; contracting with local growers; difficulties in communicating with local growers; lack of diversity of locally grown products; and local, state, and federal policy and/or regulatory requirements among the barriers.

Additionally, respondents/buyers were most interested in potential services to be provided by the Yolo Food Hub Network. These services include *local procurement training* to implement menu/food offering planning, purchasing, and preparing locally produced seasonal products; a *local products availability list*; retaining some level of *pricing tolerance for locally sourced products*; *market readiness training for local growers* less experienced in selling wholesale; and finally, *forward contracting* for locally grown products from the Yolo Food Hub Network.

In sum, the Yolo Food Hub Buyer survey provides invaluable input to gauge buyer interest and identify services to be potentially provided. This information will be utilized to develop an appropriate business plan and range of services through the creation of the Yolo Food Hub Network. We will continue to enhance the input of additional buyers as we have ongoing discussions with other K-12 school districts, military installations, healthcare providers and hospitals, and restaurant owners and larger institutions in the Northern California region.