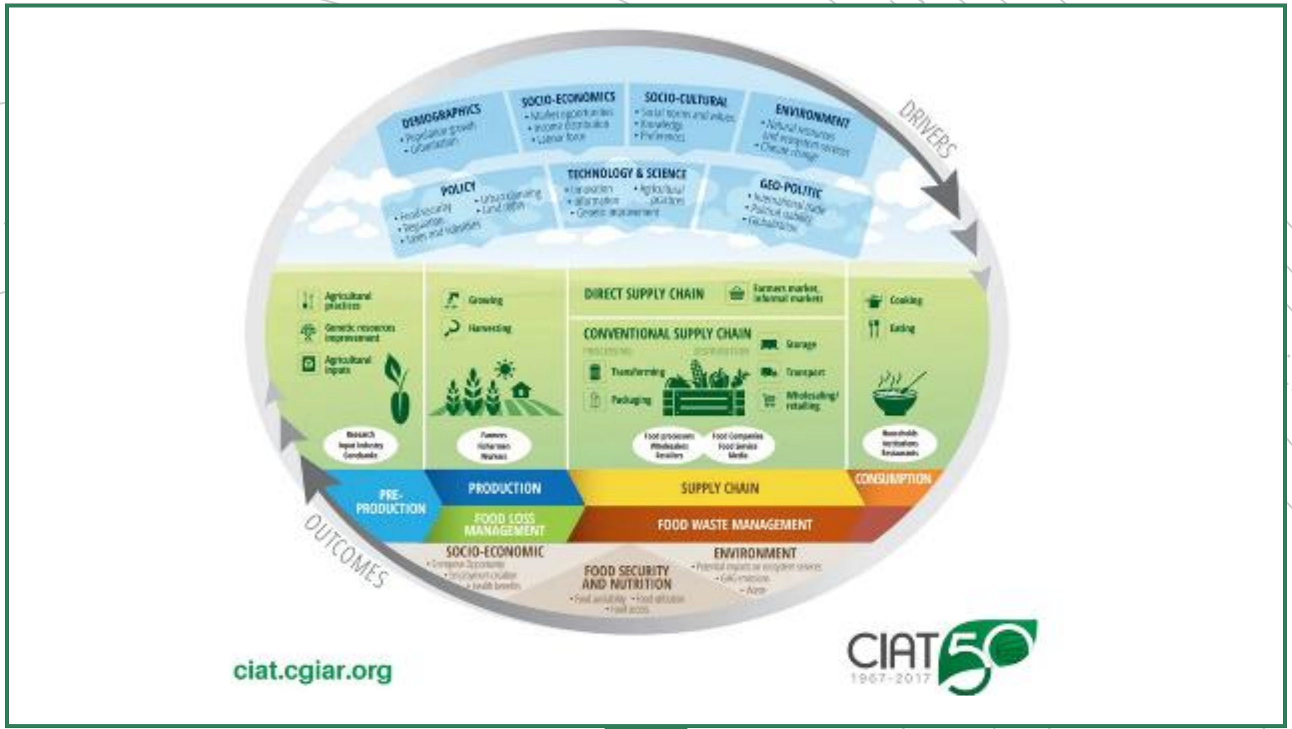
Navigating Local and Regional Food Systems in Dynamic Times

Presentation to the Kansas Food Summit: Painting a Vibrant Future



Dr. Dawn Thilmany, Professor and Director

Dept of Ag and Resource Economics, NW Rocky Mountain Food Center and REDI

July 2025

FOOD SYSTEMS
COLORADO STATE UNIVERSITY EXTENSION

USDA REGIONAL FOOD BUSINESS CENTERS

REDI@CSU
Regional Economic Development Institute

Overview of Today's Talk

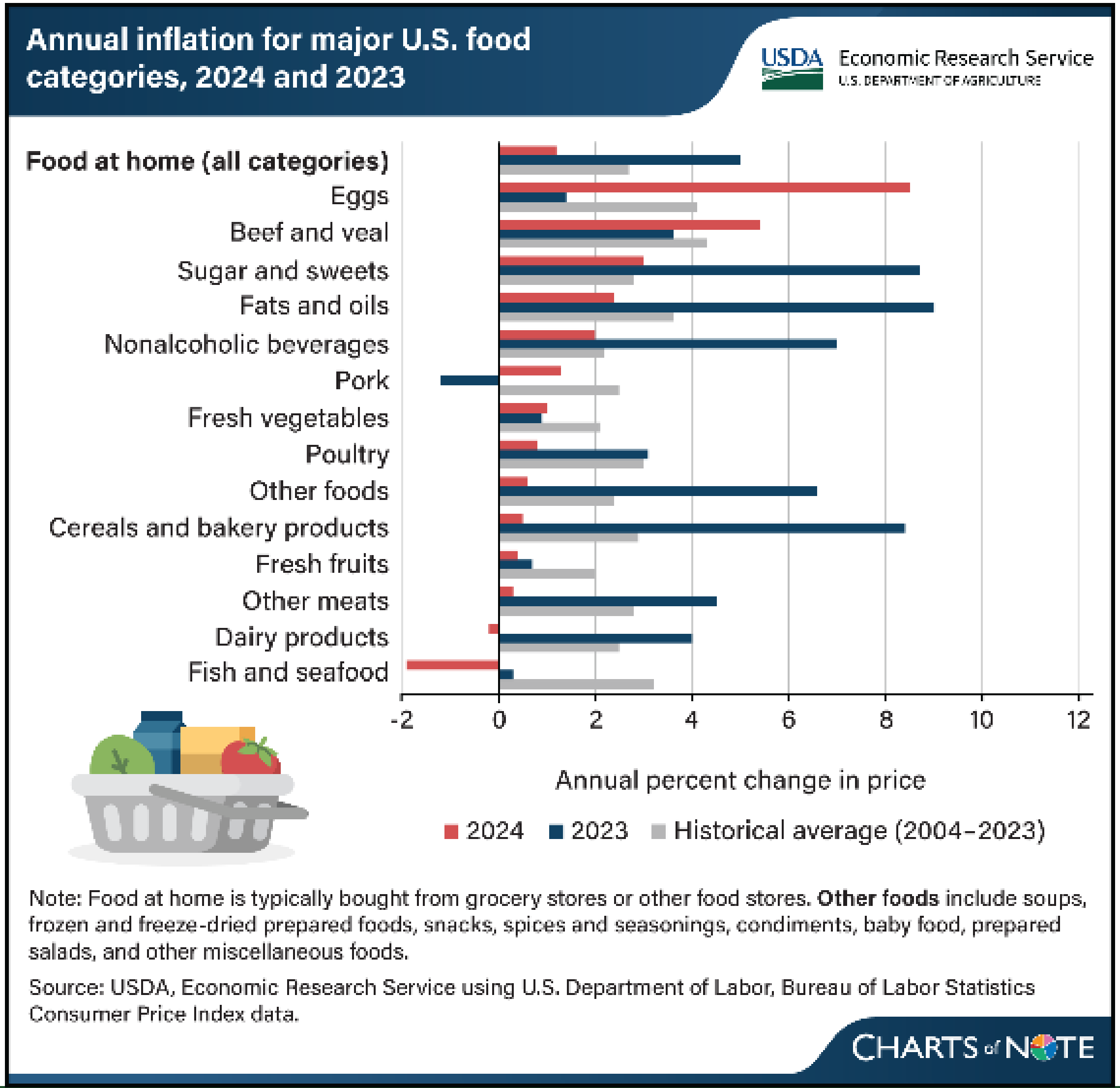
- PEOPLE: National Consumer and Food Market Dynamics
  - COVID and supply chain impacts catalyzed changes across many dimensions
  - Food and Ag as a focus
- PUBLIC ATTITUDES AND POLICY: Ag and Food Visible and Salient
  - Some Perspectives from your Neighbors in Colorado
  - A Look at the US
- PLACE: A Closer Look at the Changing Food Market Landscape
  - Important linkages to Ag, Entrepreneurs and Communities
  - USDA Regional Food Business Centers as a Response to Regional Needs…and what Next with New Federal Priorities?

Food Inflation is top of Mind

Consumer Price Index (CPI)

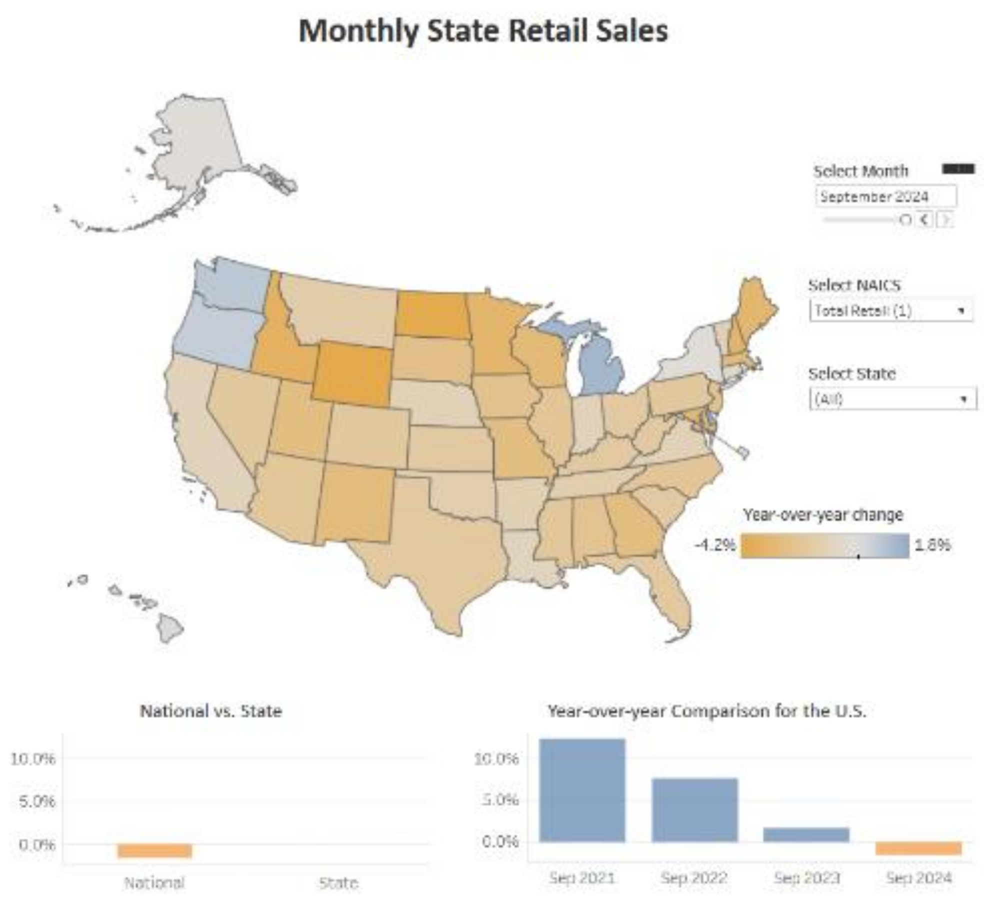
- ❖ Up 2.7% June 2024 to June 2025
  - ❖ Food prices were 3% higher

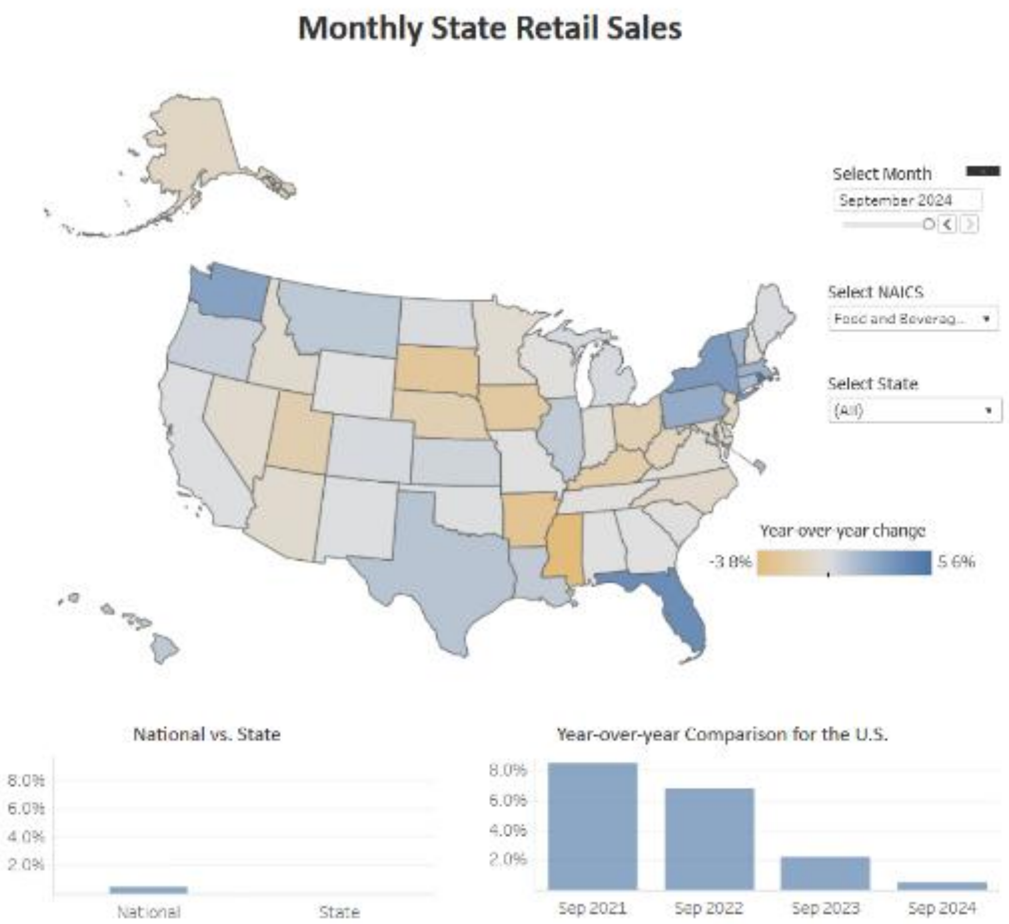
- **Food at home now below historical average**
- **Biggest pressure remains for proteins**
- **Consumers may confuse slowing inflation with an expectation for lower prices**



https://www.ers.usda.gov/data-products/food-price-outlook/summary-findings

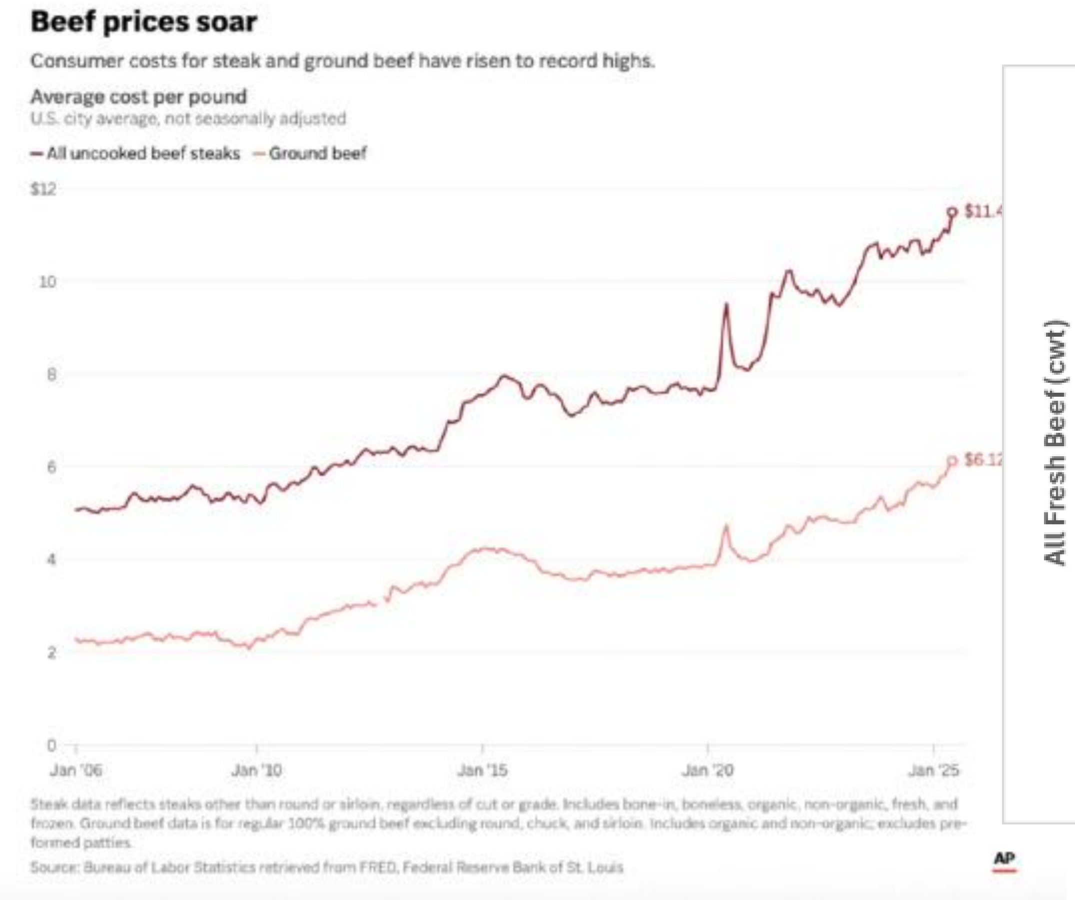
Retail Sales: Total and Food, Fall 2024

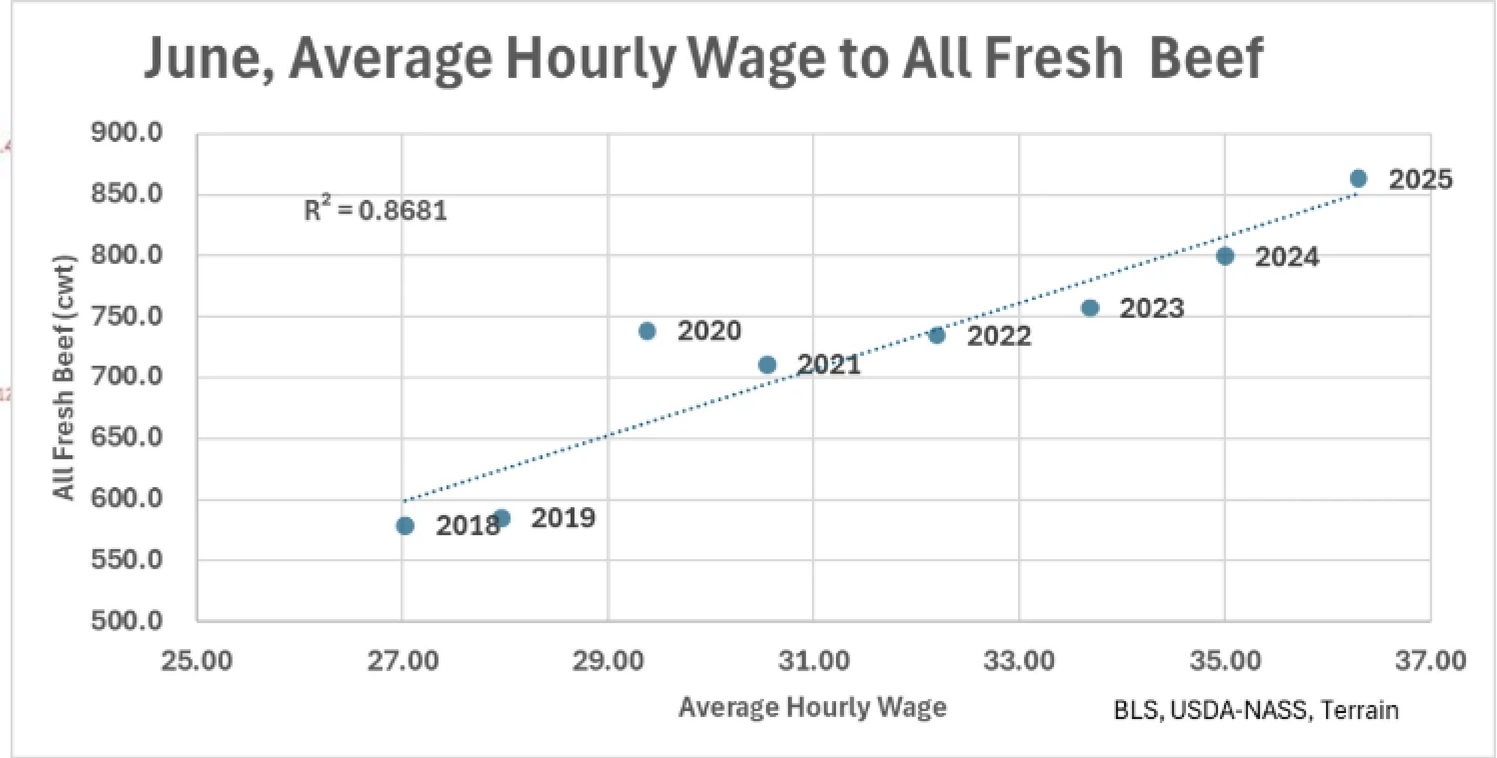




https://www.census.gov/retail/state_retail_sales.html

Price Inflation Persists: A Look at Beef





Drovers https://www.drovers.com/news/industry/why-arent-high-beef-prices-causing-sticker-shock-consumers?utm_medium=email&_hsenc=p2ANqtz-_kUs0SfkN2H7_rlP12xa539GFaNoplvwXsD0x_Y5R1TnrVrqyPb5HxOeINx2qKalGunsBM5jysX5N8ykmwL1D29g_Tah9TJVjBGr4u79zrqGnRi60&_hsmi=372651682&utm_content=372651682&utm_source=hs_email

Changes in the retail landscape

- Pandemic
- E-commerce
- Emphasis on fresh
- Prepared foods/meal solutions/grocerants

NATIONAL GROCERS ASSOCIATION

The pandemic drove record supermarket sales as consumers were forced to eat more meals at home.

That drove **accelerated acceptance of online grocery shopping**, bringing 5 years of anticipated growth in a span of just a few months.

Grocers that up until then had little or no web presence were forced to offer **online shopping, pickup or delivery to meet the demand from people hesitant to shop in person**, despite grocery being declared an essential business during the pandemic.

Grocers have **invested aggressively in the fresh perimeter** to enhance the shopping experience. Despite inroads by e-commerce, fresh areas remain a draw for in-person shoppers.

While the pandemic stalled in-store dining, grocers pivoted to offer **restaurant-quality meals in pre-packaged formats** (grab & go, heat & eat).

Rural Grocery Succession Planning: Beyond Grocery Webinar, Kansas State University Rural Grocery Initiative Webinar. Spring 2022

Food Spending Priorities Favor “Fresh Zone”

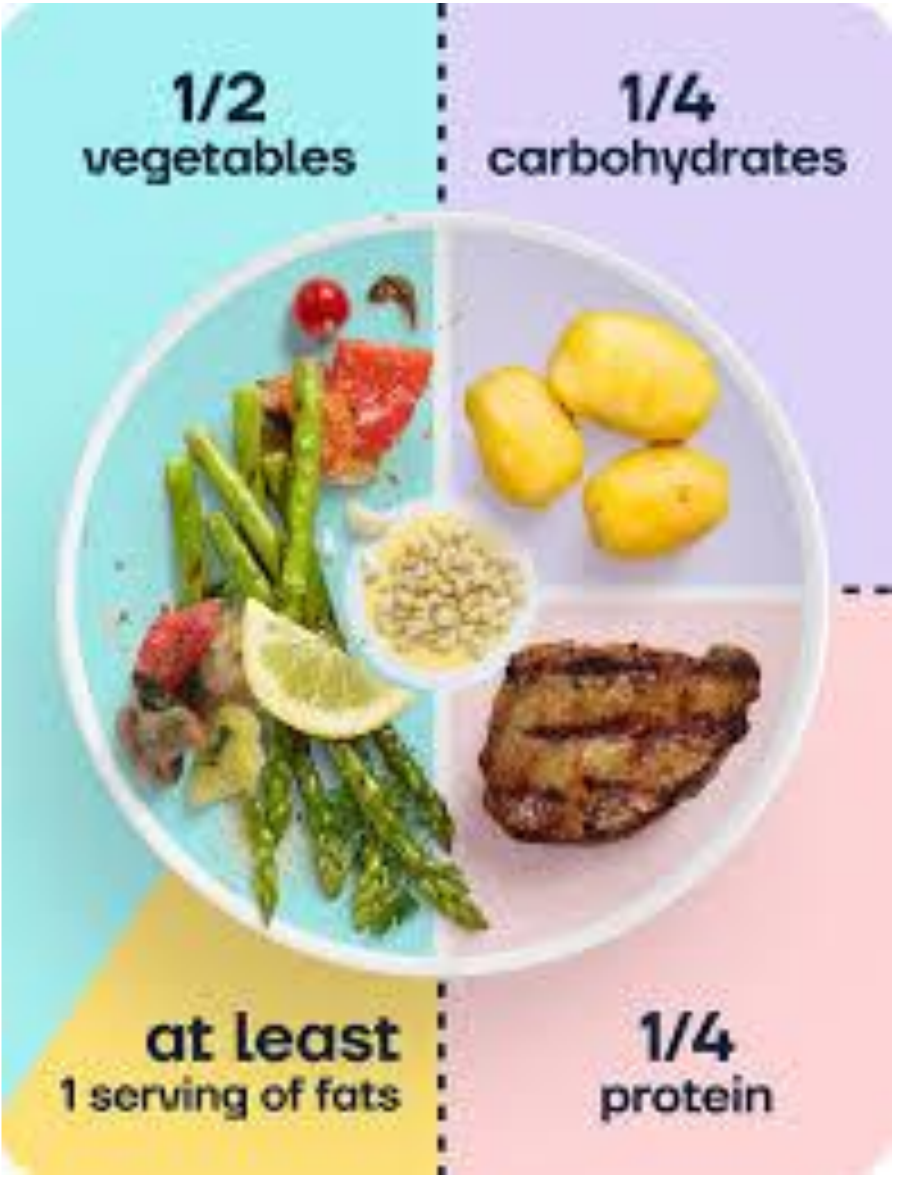
New SensaPay Study Reveals Top 14 Spending Priorities for Americans in 2025

	Category	Net Intent Q1	Purchases/ mo	Inflation % YoY	Notes
1	Fresh Produce	15	4.300	0.90%	Strong intent, essential, frequent
2	Meat & Dairy	13	4.300	7.00%	High inflation, but strong intent
3	Baby Supplies	13	1.000	10.30%	Higher inflation, but essential
4	Gasoline	10	2.200	11.80%	Deflation, frequent necessity
5	Pet Food & Supplies	6	1.000	0.20%	High stability, essential
6	Center-store Groceries	6	4.300	2.00%	Stable spending, essential

https://www.drovers.com/news/education/what-americans-wont-give-2025-spending-priorities-revealed?utm_medium=email&_hsenc=p2ANqtz-8rrs_mRodzA_xvyxxncA9vJ8AH1d-t4IPBHeDomhcySUXupxX80aa33RtF-N5I_MCoArnlMnbfHNHCuTazAg9b45_8P6M_8eJ4yelMT4jCjTwOhZw&_hsmi=372651682&utm_content=372651682&utm_source=hs_email

Weight Loss Medications' Ripple Effect

- Estimated 9% of Americans on these drugs
  - More likely to purchase whole, nutrient-dense foods, including fresh fruits and vegetables, lean proteins, whole grains, and low-fat dairy, and to avoid snack foods, sugary drinks and alcohol.
- Morgan Stanley study revealed that monthly grocery spending fell by up to 9% in households with GLP-1 users, confirmed by a recent Cornell study.
  - Major food and beverage companies have experienced a marked decrease in sales of snacks and sweets.



https://progressivegrocer.com/embracing-ozempic-boom-how-food-and-beverage-companies-need-adapt

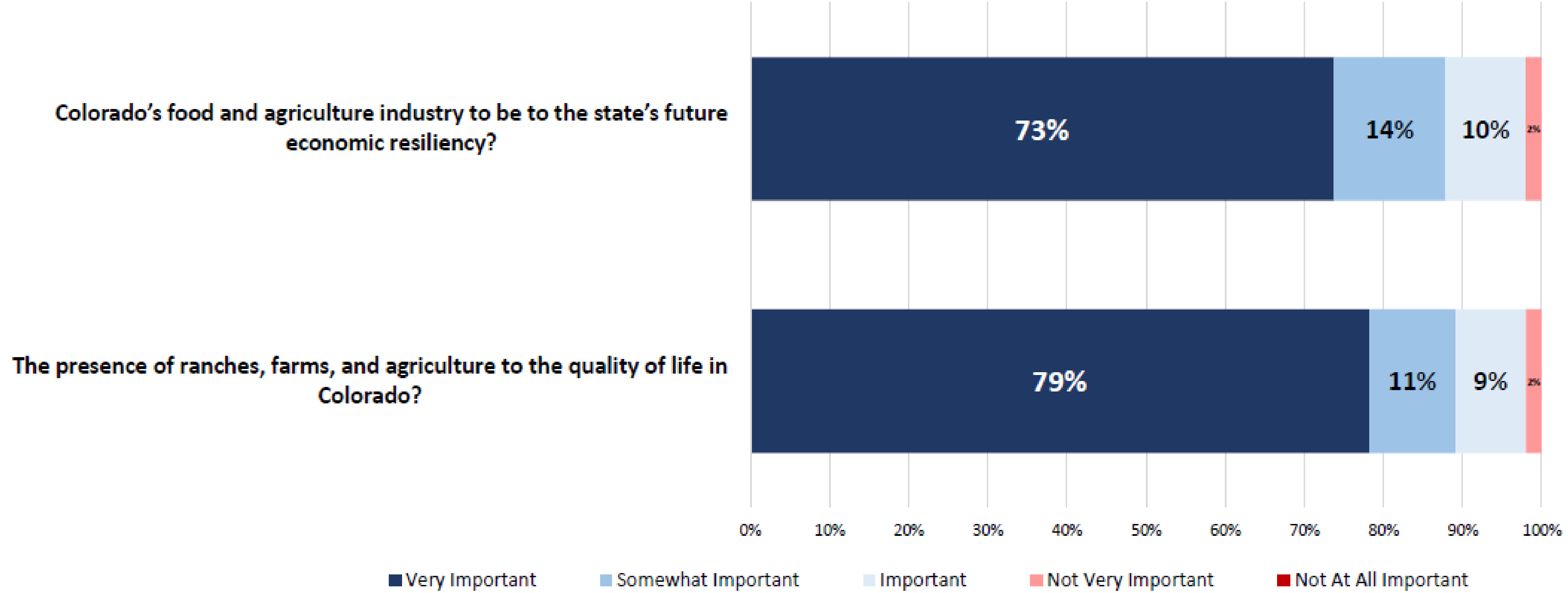
Public Attitudes And Policy

COLORADO STATE UNIVERSITY
EXTENSION

https://www.ers.usda.gov/data-products/charts-of-note/chart-detail?chartId=109618

Q7. How important would you consider...

by the percentage of respondents (excluding "not provided" responses)



MARKETING AND PRODUCT BRANDING

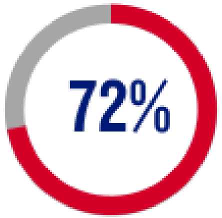
Elevating Colorado Products in Food Markets

Respondents care more about **WHERE** their food is grown, instead of **HOW** their food is grown

MARKETING CLAIMS THAT INFLUENCE FOOD PURCHASES

#1 Grown or raised in Colorado

#2 Colorado Proud



would buy more Colorado products if available, branded and affordable

MORE THAN 90% believe farmers markets, farm stands and CSAs are very supportive of Colorado farms and CO Proud, and 2/3 purchase some of their food there

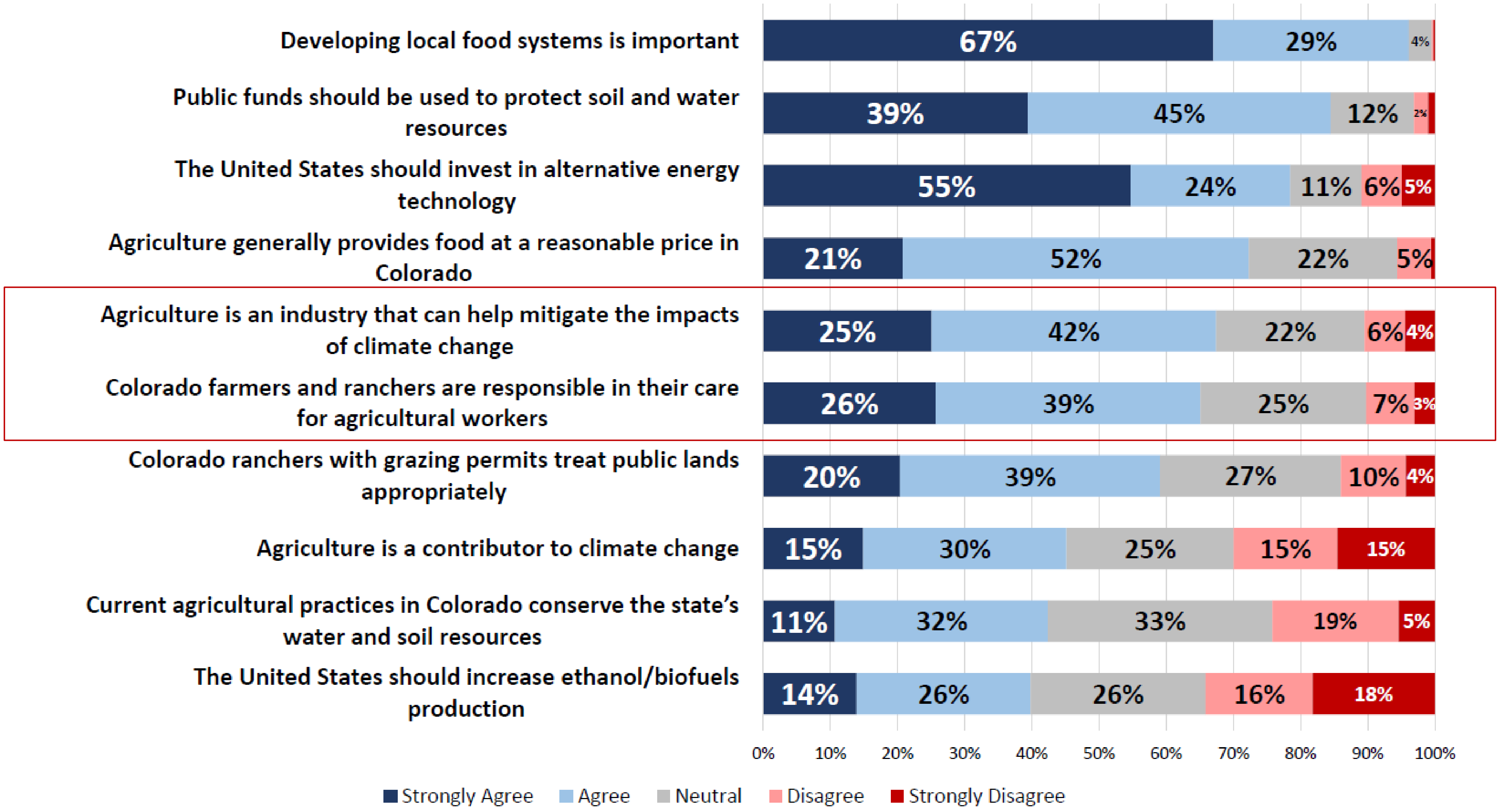
Pueblo Chilis' growth in awareness and placements in stores/restaurants is one successful example of origin-based marketing

COLORADO Department of Agriculture

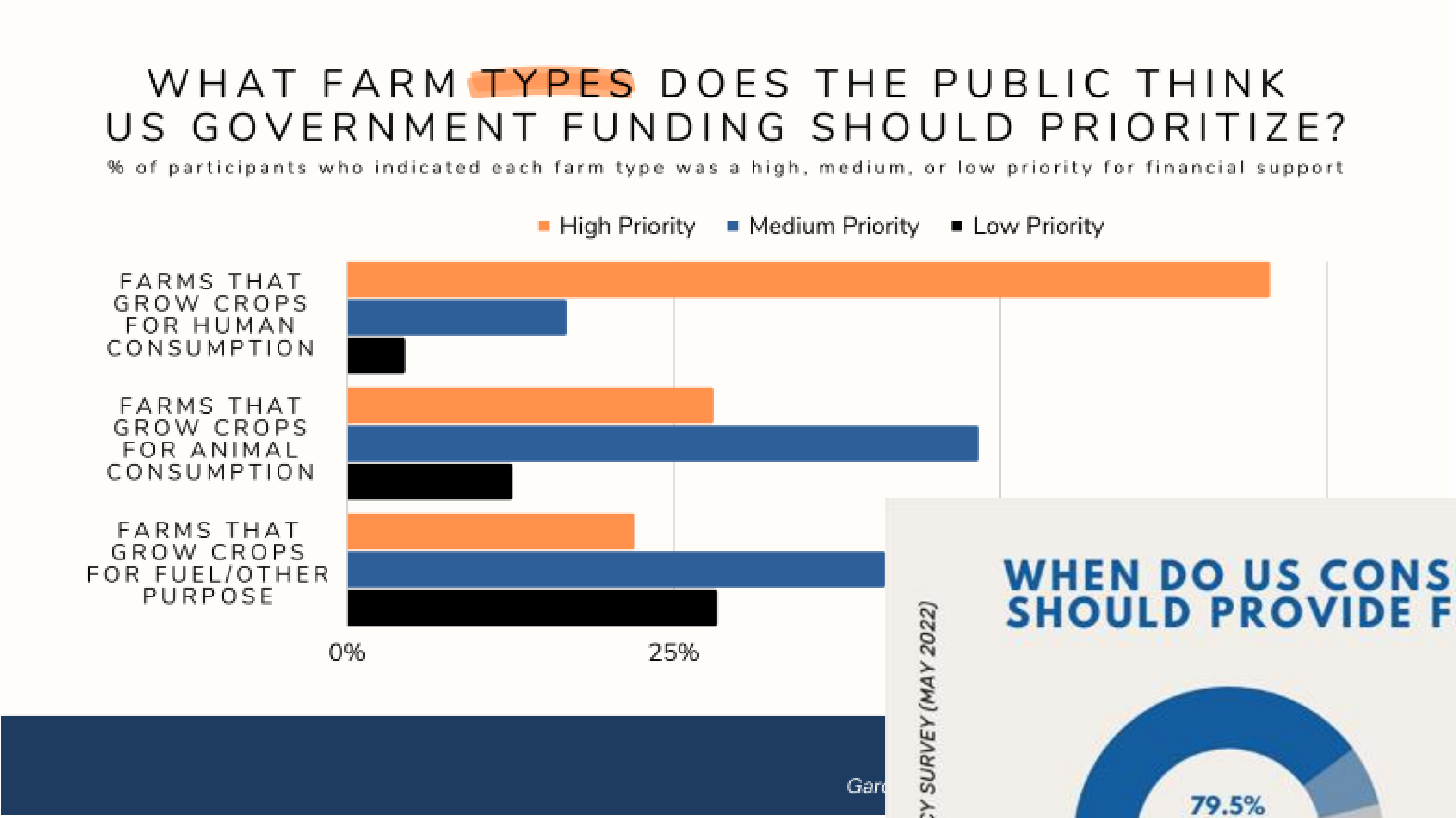
COLORADO STATE UNIVERSITY

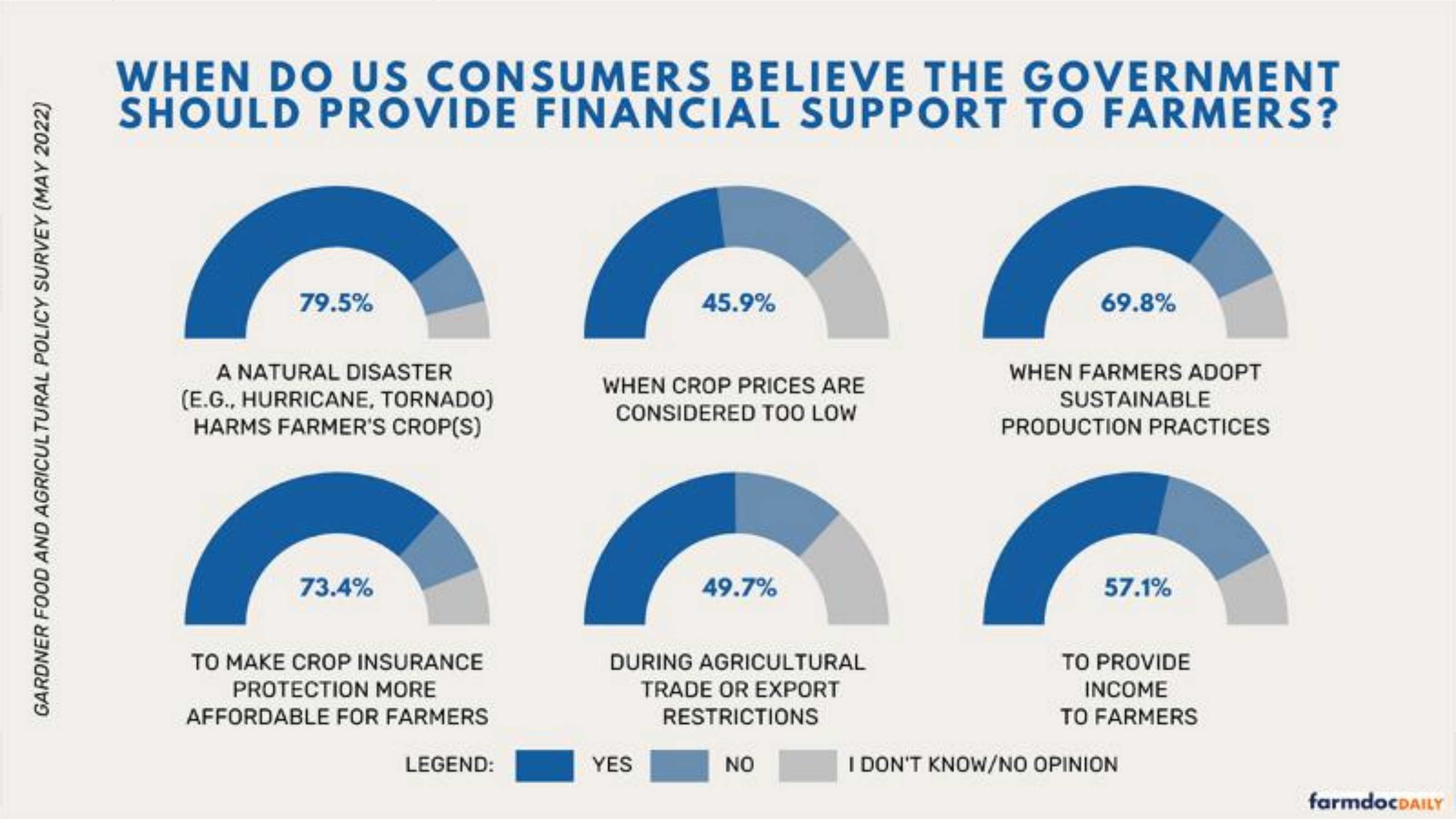
Q20. What is your level of agreement with the following statements?

by the percentage of respondents (excluding "don't know" responses)



US Perspective





IMPACTS of COVID On Market Channels:
A 2023 National Consumer Study of Households

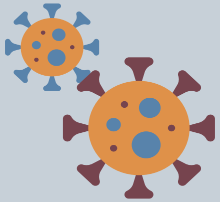
Food At Home
Food Away From Home
Food Acquisition
SNAP
WIC
P-EBT
Local Markets
Traditional Markets

Survey 1.0
Oct. - Nov. 2020

September 2019

The Before Times

April 2020



Pandemic Begins

September 2020

The New Normal

Survey 2.0
Nov. 2021 - Jan. 2022

October 2020

Mask on. Mask off.

October 2021

Another Day, Another Variant

Survey 3.0
Dec. 2023 - Jan. 2024

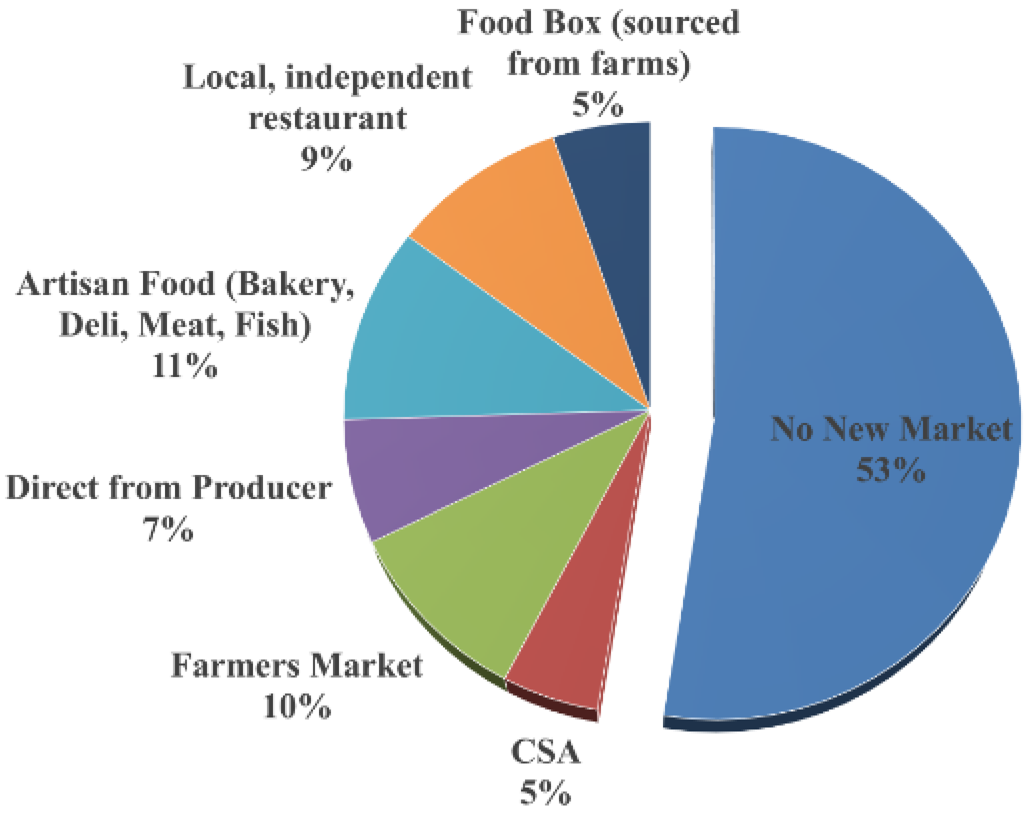
October 2022

Food Prices & Purchases on the Rise....

October 2023

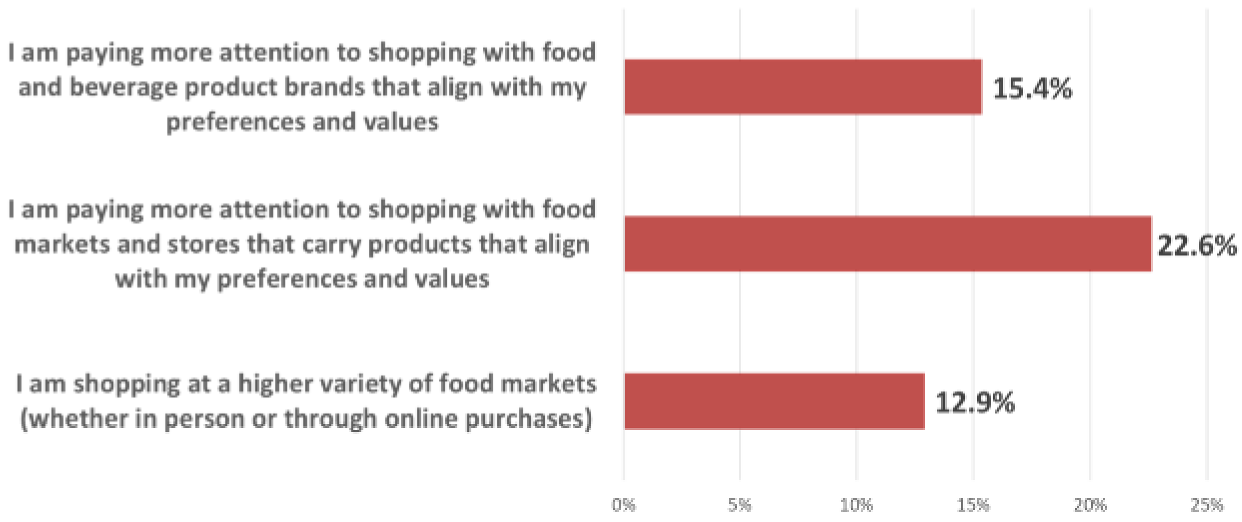
And Era of New Shopping Habits?

Did you purchase from a market for the first time, since October 1, 2020?



Among those who rated Locally Grown among top 3 motivations when buying food

How has your food purchasing behavior changed since early 2020 ? (before the COVID-19 pandemic, check all that apply)



577 out of 1271 (45%) of those motivated to buy locally grown tried at least one new local or regional market outlet/

These values-driven customers tried more markets with over half trying more than one new market channel

Market Channel Aggregations

<u>Full Selection</u>
- Supercenter/ Wholesale
- Supermarket
- Diverse, Full-line Selection
- National presence

<u>Limited Selection</u>
- Small-format Grocers
- Health Stores
- Niche, moderate selection
- Regional or national presence

<u>Discount and Convenience</u>
- Discount Stores
- Convenience/ Corner Stores
- Limited selection
- Local, regional or national presence

<u>Local & Regional Stores</u>
- Direct Markets
- Farmers Markets
- Gourmet/ Artisan Sellers
- Niche, limited selection
- Local or regional presence

<u>Seller-based Limited Selection</u>
- Food Boxes
- Meal Kits
- Niche, limited selection
- Local, regional or national presence

Natural and Wellness Products Are Driving Growth Across All Channels

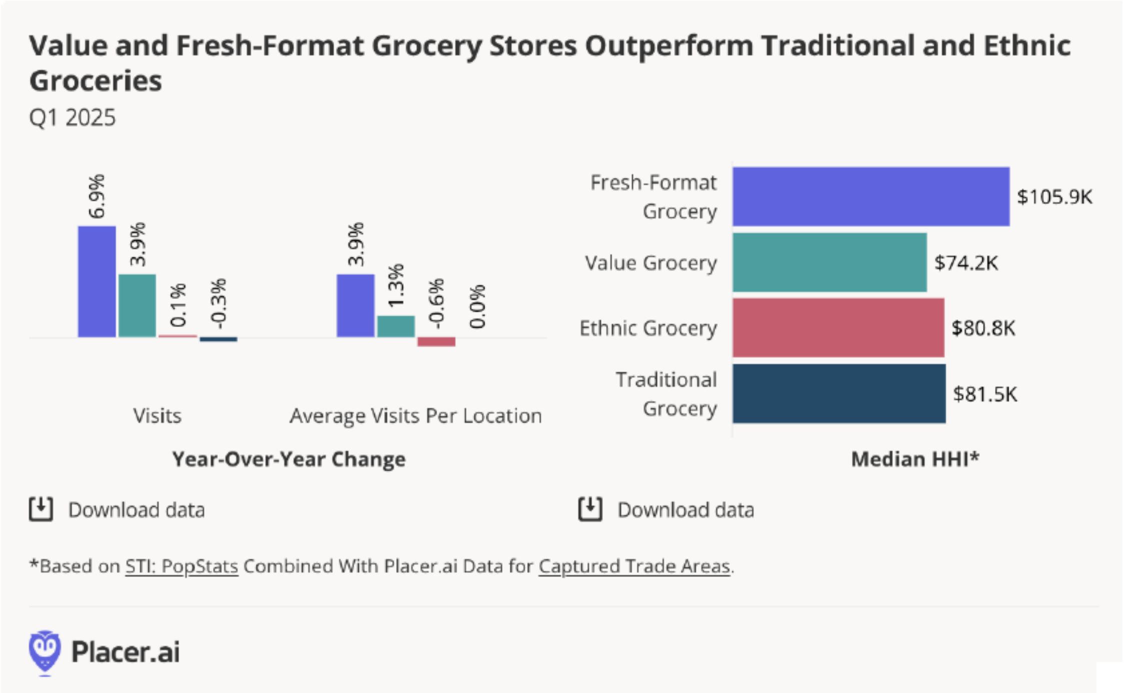
2030

"Zennials" will hold **47–60%** of buying power

And they **shop with their values,** favoring people and planet as well as health

	Natural Expanded Channel	Regional & Independent Grocery Channel	Conventional MultiOutlet	Convenience Channel
Total Growth	+3.7% Total Growth	-1.9% Total Growth	+1.6% Total Growth	+1.0% Total Growth
NATURAL PRODUCTS	+6.6%	+1.1%	+4.4%	+5.0%
SPECIALTY & WELLNESS PRODUCTS	+2.3%	+1.2%	+3.0%	+4.2%
CONVENTIONAL PRODUCTS	-1.1%	-3.1%	+1.1%	-1.3%

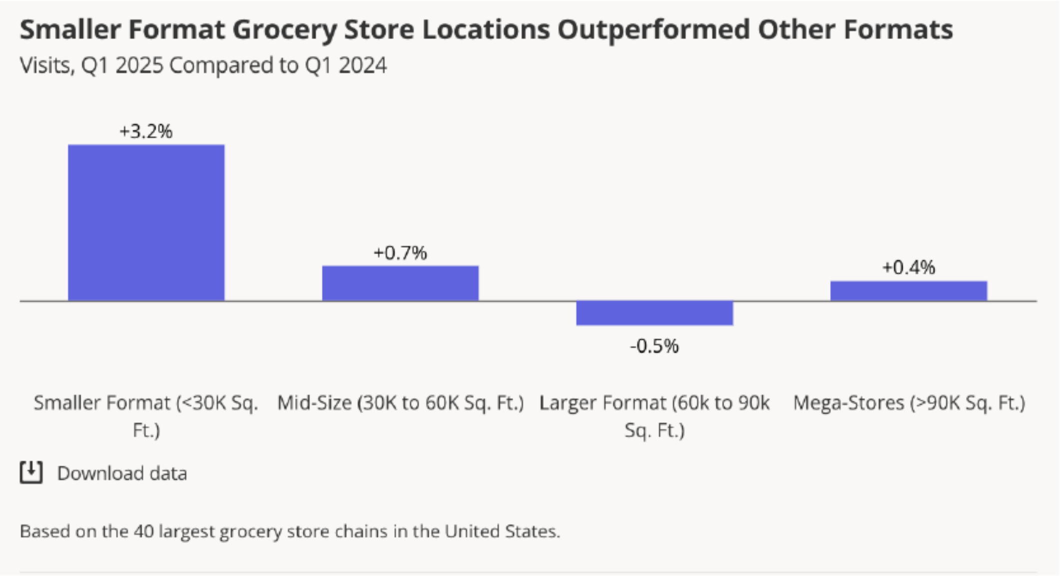
https://www.spins.com/resources/report/2025-industry-update-trends-predictions/

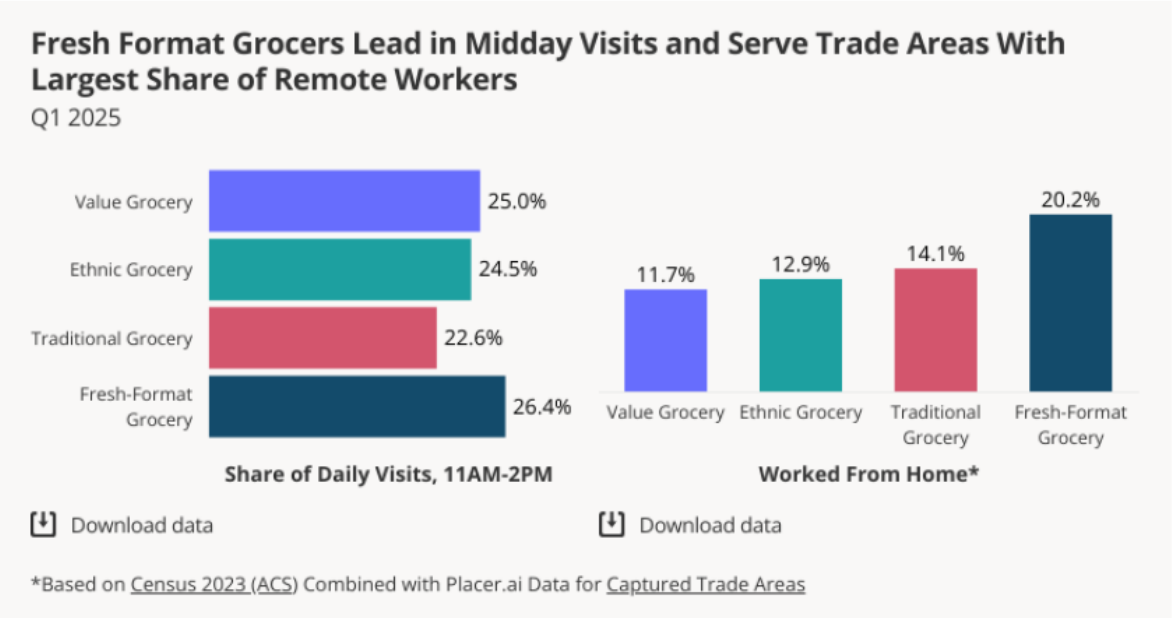


Placer.ai Report —— May 2025

Grocery in 2025: Visitation Trends and Consumer Behavior

Dive into the data to see the trends shaping the grocery space in 2025 and uncover actionable insights for strategic decision-making in the competitive food-at-home market.





Top 3 motivations of food purchases, 2022 (N = 5,024)

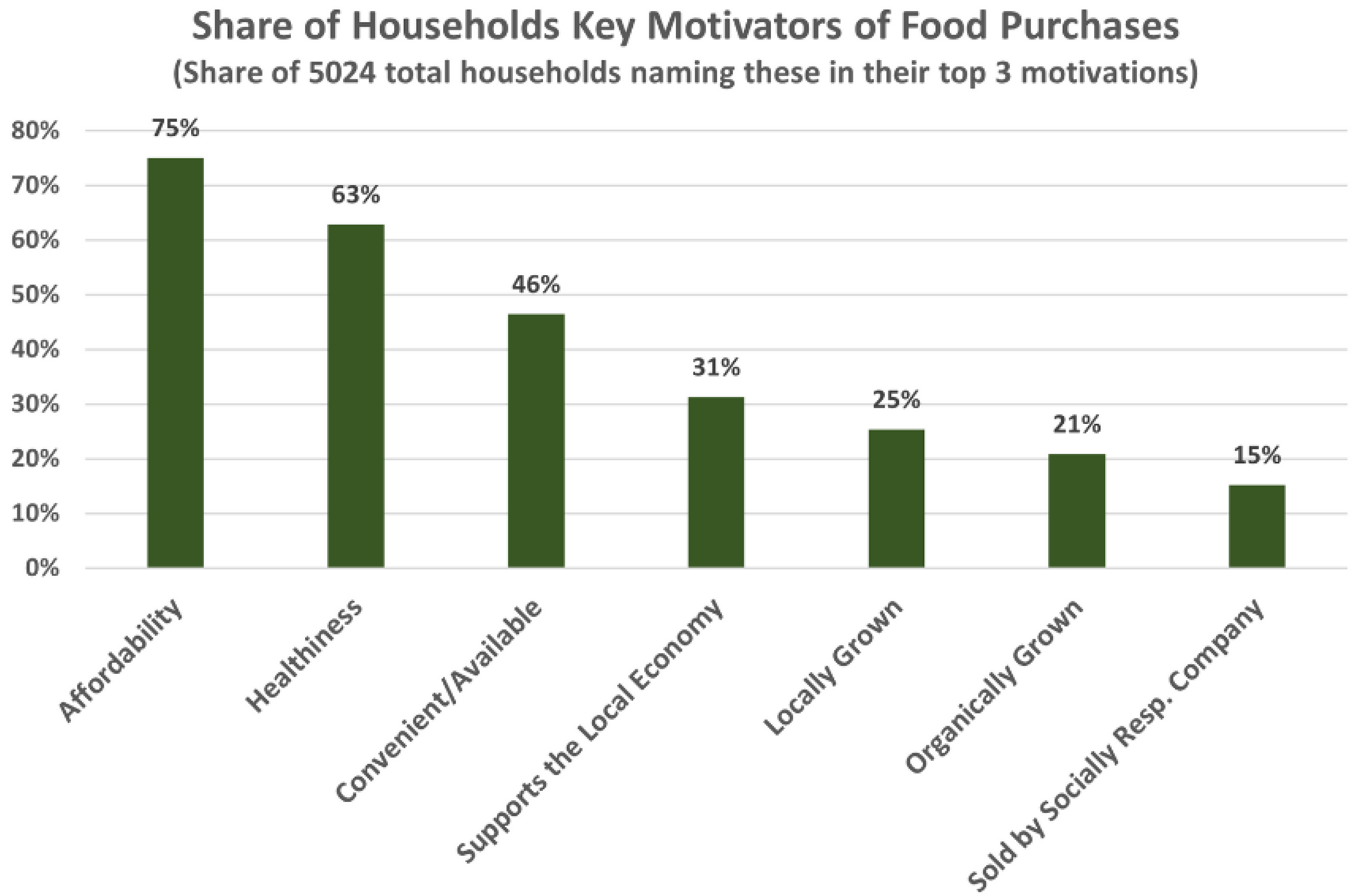
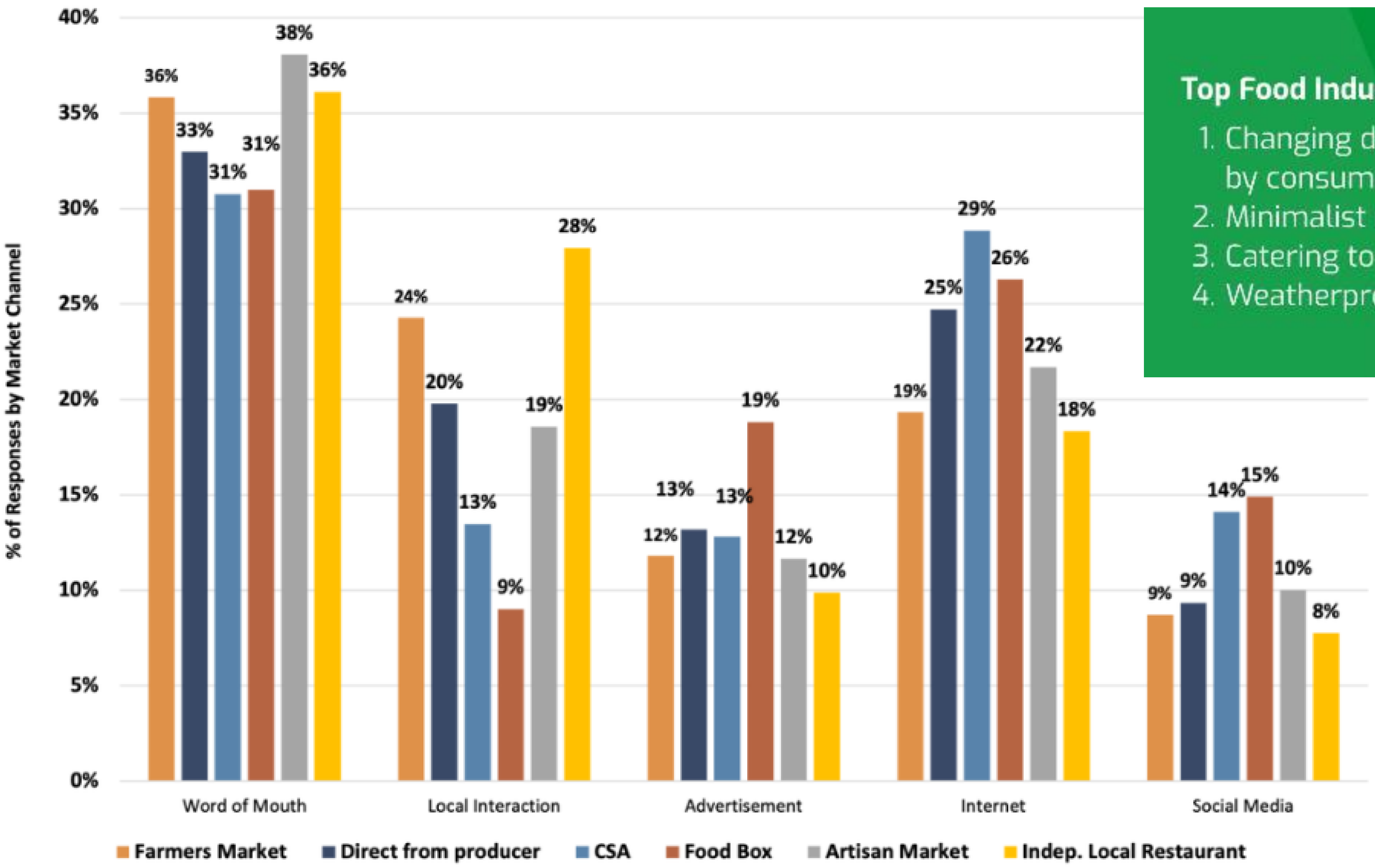


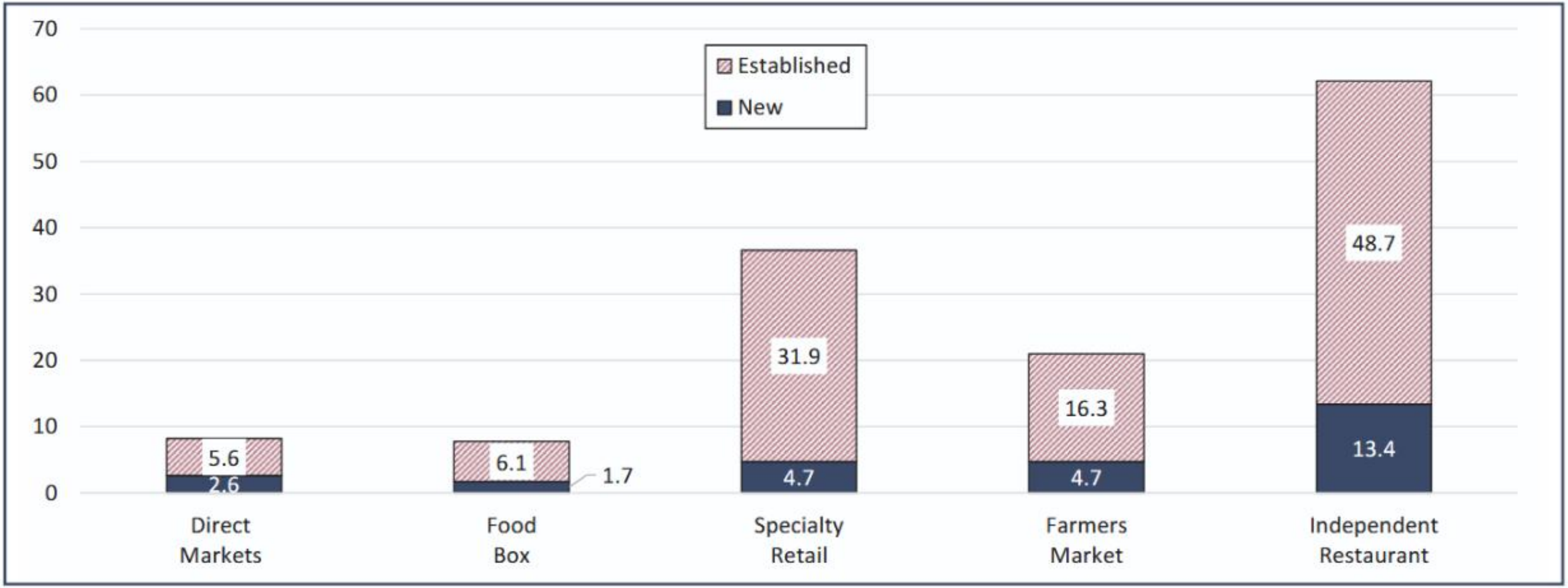
Fig. 3. Source for information about new local market channels between October 2020 and October 2021.



https://lfscovid.localfoodeconomics.com/wp-content/uploads/2022/08/LFS-CFI-2-04.pdf

Comparing New and Established Local Shoppers: Heartland Region

Figure 2: New & Established Local Market Channel Users (% in October 2023)



Comparing Channel Usage Intensity

- **Heartland region** **compared to the** **NW Rocky Mountain**

Figure 3: Diversity of Local Market Channel Usage (% in each category for 2023)

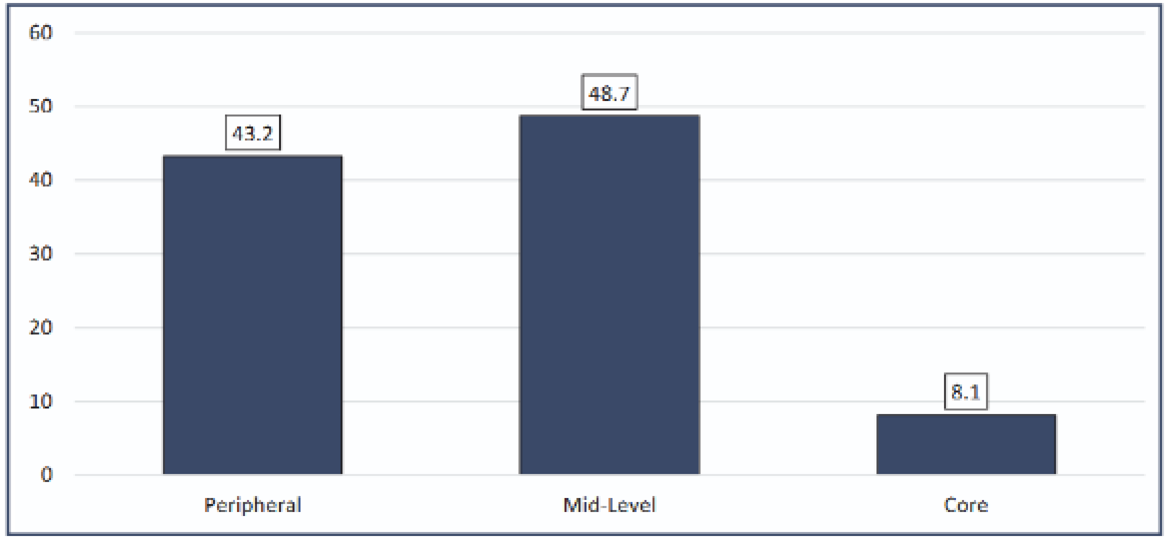
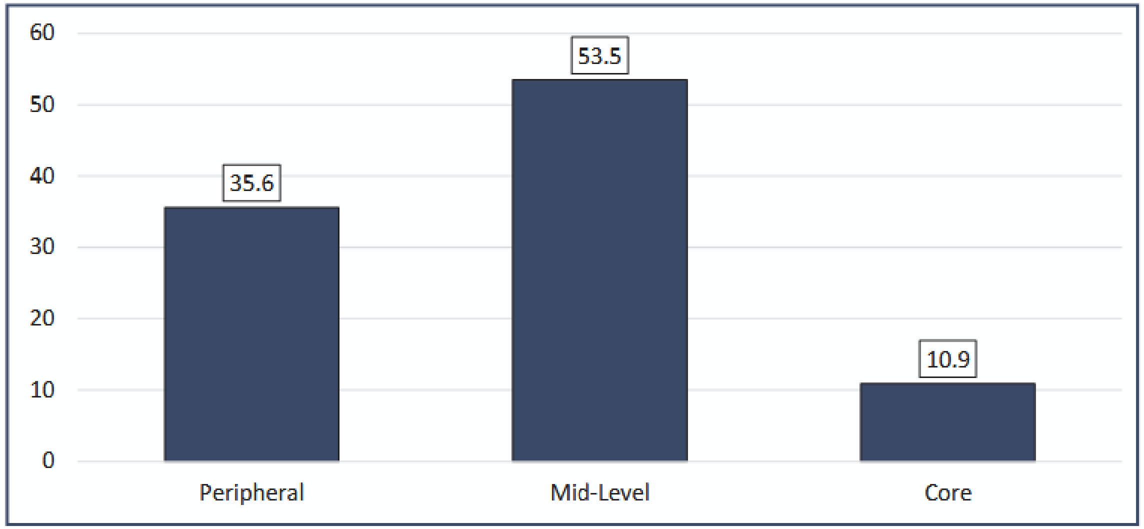


Figure 3: Diversity of Local Market Channel Usage (% in each category for 2023)



- Core Local Consumers: purchased from at least **four** different local market channels in **both** 2022 and 2023
- Mid-Level Local Consumers: purchased from **at least three** local market channels in 2022 **or** 2023
- Peripheral Local Consumers: purchased from **two or fewer** local market channel in 2022 **or** 2023

Comparing expenditures across Time

- Core Local Consumers: purchased from at least four different local market channels in both 2022 and 2023
- Mid-Level Local Consumers: purchased from at least three local market channels in 2022 or 2023
- Peripheral Local Consumers: purchased from two or fewer local market channel in 2022 and 2023

Figure 6: October 2022 Expenditures by Market Channel Users, by Consumer Segment ($ per week by household)

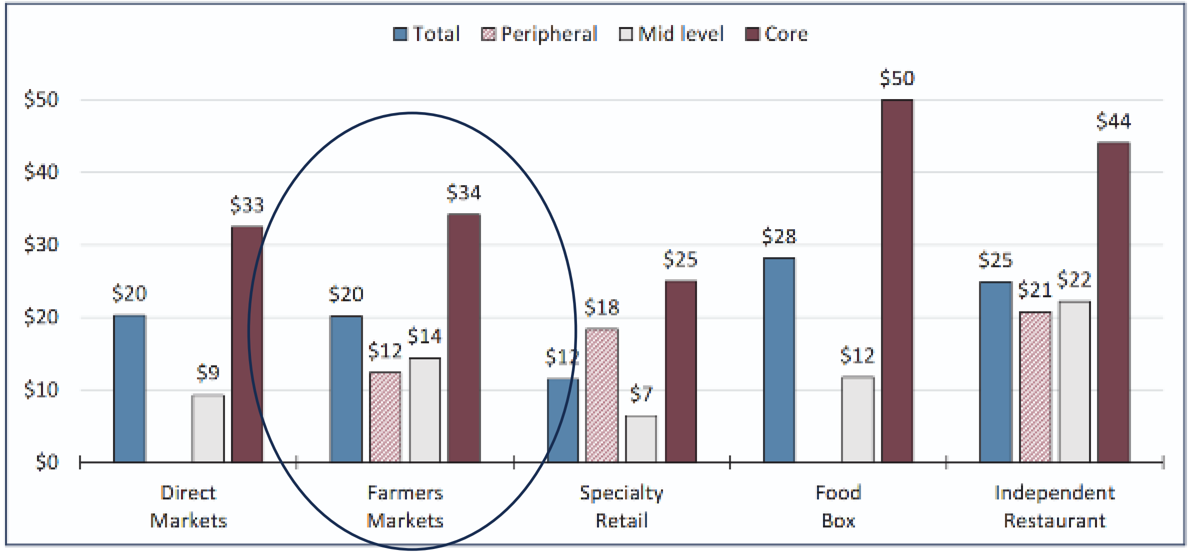
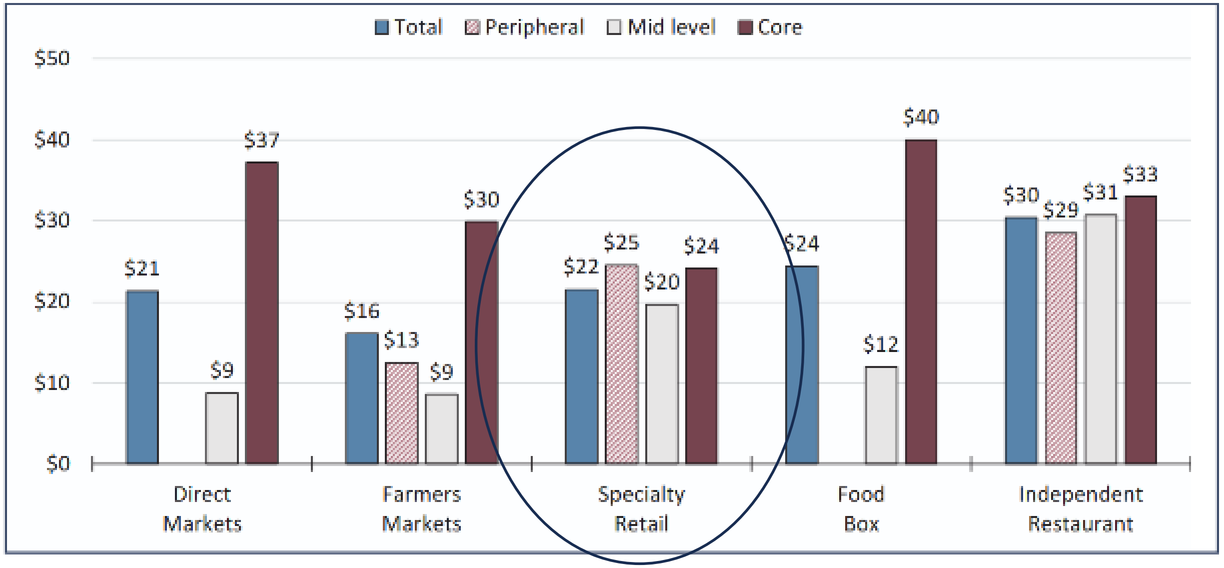


Figure 5: October 2023 Expenditures by Market Channel Users, by Consumer Segment ($ per week by household)



Note: In this analysis, we exclude survey participants who indicated that they did not shop at these market channels so these dollars are only representative of the share of respondents reported using those channels.

The core group consistently spends more on food boxes and at farmers and direct markets, but restaurant spending went down in 2023.

- Mid-level users had more stable spending between 2022 and 2023, but a notable increase in spending at specialty retailers between 2022 and 2023 (increasing from $7 to $20 weekly) and a drop in farmers market spending (from $14 in 2022 to $9 in 2023).

How do CONSUMER VALUES VARY FROM SUPERMARKET to LRFS CHANNELS?

Food At Home Market Channels

Farmers Market

- Locally grown
- Organic
- Support local economy
- COVID affected shopping
- Have purchase method options

Food Box Delivery

- Locally grown
- Organic
- Support local economy
- Meet cultural preferences
- COVID affected shopping

Direct from Producer/CSA

- Locally grown
- Organic
- Health
- Support local economy
- Meet cultural preferences
- COVID affected shopping

Food Away From Home Market Channels

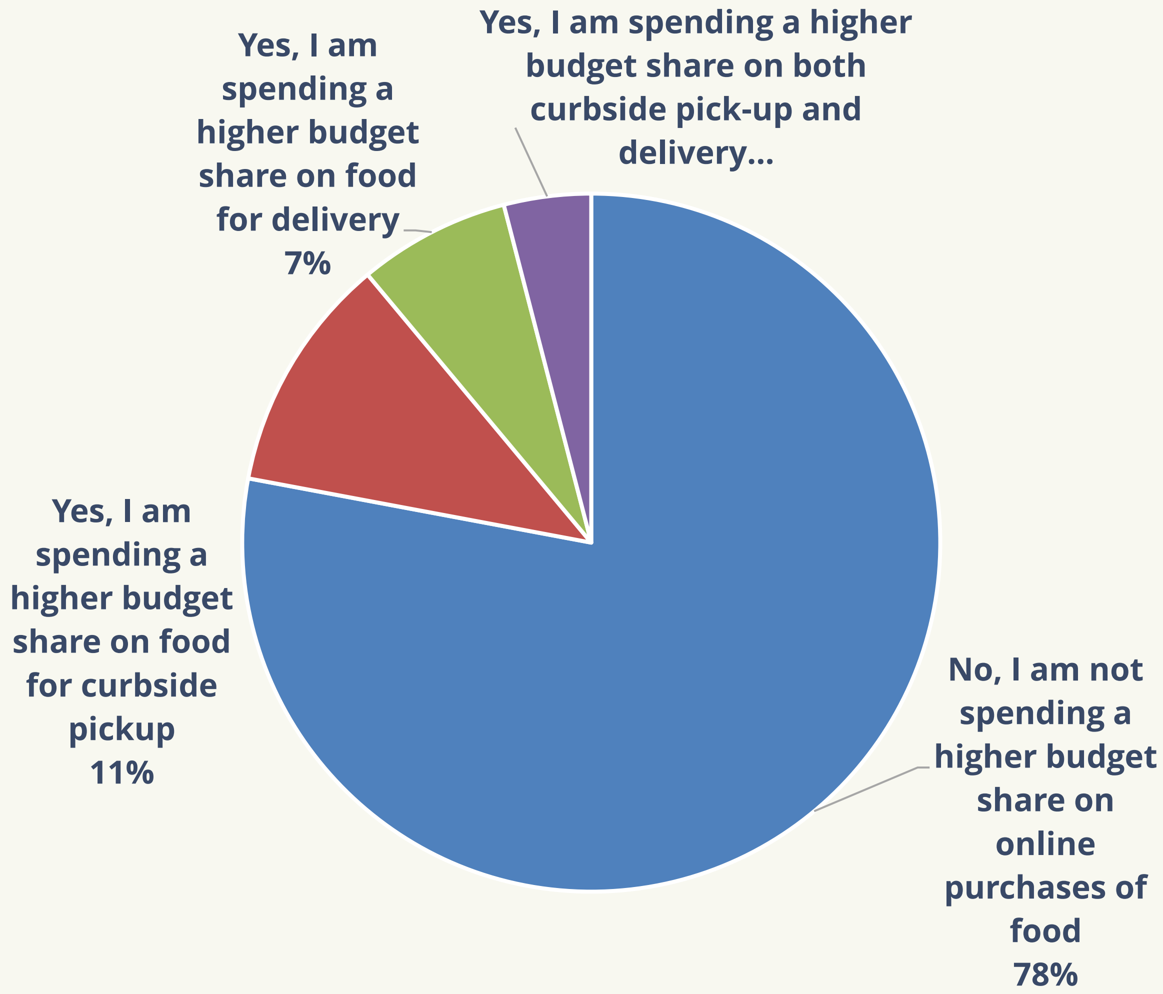
Bakery/Deli/Specialty

- Support local economy
- Meet cultural preferences
- COVID affected shopping
- Impact local economy with purchases
- Confident in safety protocols

Local, Independent Restaurant

- Impact local economy with purchases
- Otherwise, similar to broader restaurant patrons

Change in Online Food Shopping Since the Pandemic Began



Are you spending a higher share of your budget on online ordering for food?

For the heaviest spenders (and users) of online food shopping...

- Delivery utilization at supercenters, supermarkets, health food stores, and small format grocers is higher.
- Reflect a decrease in delivery from farmers markets and direct markets.

USDA REGIONAL FOOD BUSINESS CENTERS NORTHWEST & ROCKY MOUNTAIN

Connecting, Strengthening and Scaling Food Supply Chains in the Northwest and Rocky Mountain Region

Local Food Systems

Wave 1

Rural places still give incentives to larger VA businesses

Wave 2

Meat Processor Expansion

Beginning Farmer/Rancher

3rd Wave synergies

Wave 3

USDA REGIONAL FOOD BUSINESS CENTERS

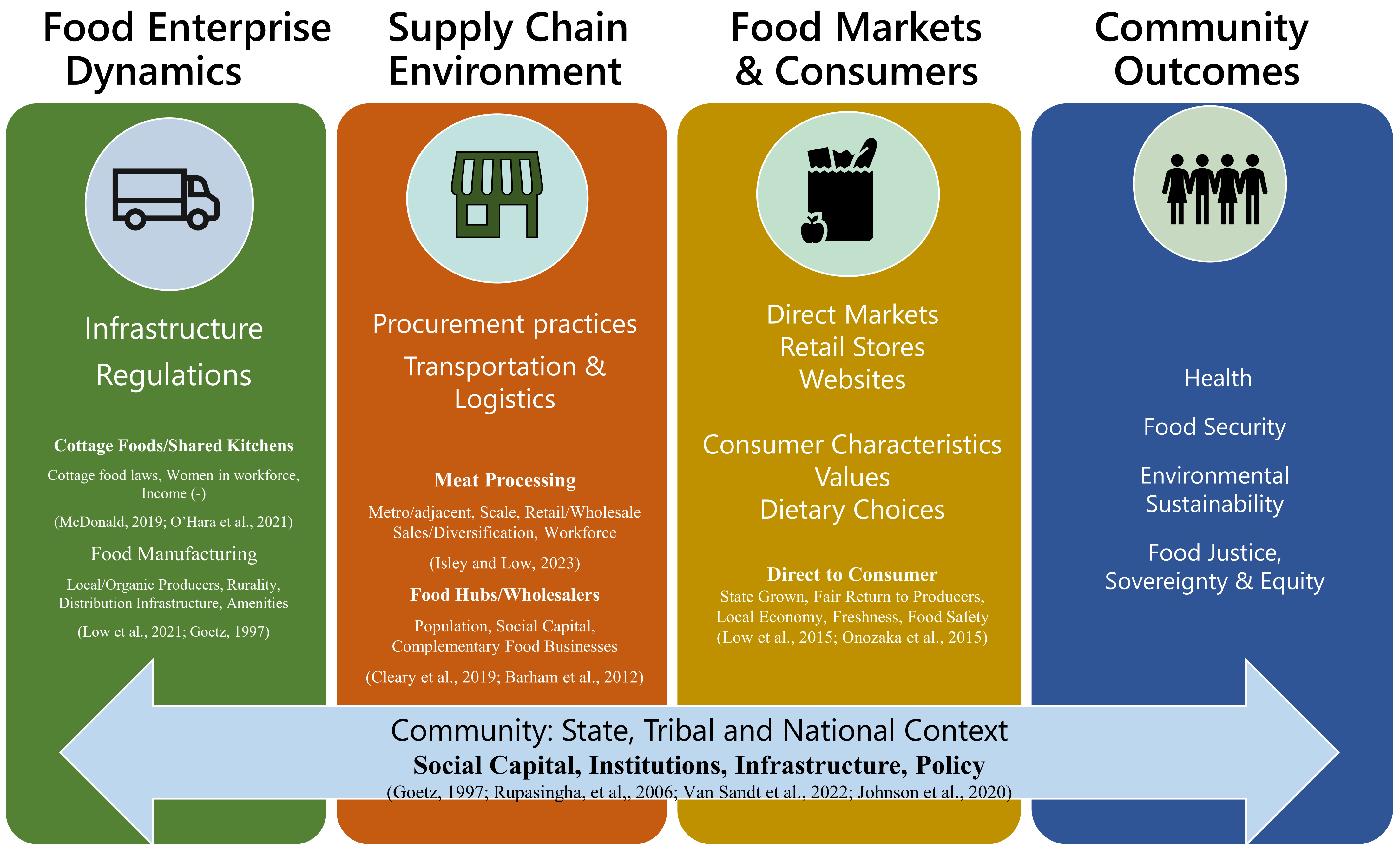
Connections & Collaboration
Build networks & hubs
Enterprise clusters:

- lower transaction costs
- Aggregation
- Knowledge spillovers

With a decreased public role, who plays the role of network builder?

Waves of Economic Development

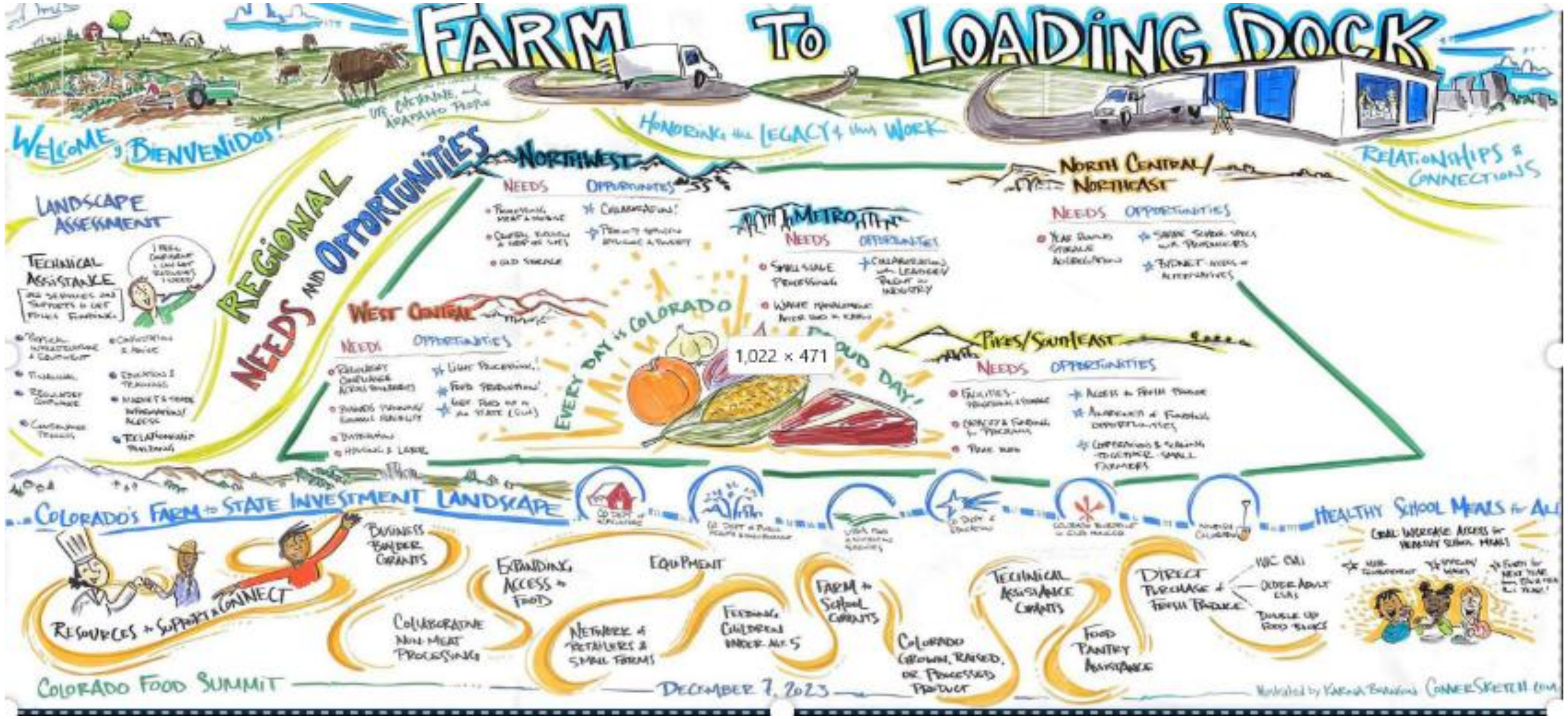
1st Wave	2nd Wave	3rd Wave
Business Recruitment	**Small Business Development and Entrepreneurship**	**Public-Private Partnerships**
Tax incentive	Seed grants and small loans	Networking
Limited regulations	Business retention and expansion (BR&E) programs	Social capital
Cheap land		Economic clusters



Food Enterprise Dynamics
Supply Chain Environment
Food Markets & Consumers
Community Outcomes
Infrastructure
Regulations
Cottage Foods/Shared Kitchens
Cottage food laws, Women in workforce, Income (-)
(McDonald, 2019; O'Hara et al., 2021)
Food Manufacturing
Local/Organic Producers, Rurality, Distribution Infrastructure, Amenities
(Low et al., 2021; Goetz, 1997)
Procurement practices
Transportation & Logistics
Meat Processing
Metro/adjacent, Scale, Retail/Wholesale Sales/Diversification, Workforce
(Isley and Low, 2023)
Food Hubs/Wholesalers
Population, Social Capital, Complementary Food Businesses
(Cleary et al., 2019; Barham et al., 2012)
Direct Markets
Retail Stores
Websites
Consumer Characteristics
Values
Dietary Choices
Direct to Consumer
State Grown, Fair Return to Producers, Local Economy, Freshness, Food Safety
(Low et al., 2015; Onozaka et al., 2015)
Health
Food Security
Environmental Sustainability
Food Justice, Sovereignty & Equity
Community: State, Tribal and National Context
Social Capital, Institutions, Infrastructure, Policy
(Goetz, 1997; Rupasingha, et al,, 2006; Van Sandt et al., 2022; Johnson et al., 2020)

The growth in regional markets

- Kansas direct Sales grew from $9.9 to over $20 million in 2022 (over 100%!!)
- In the US, largest growth between 2017 and 2022 was local foods sold directly to retail markets, institutions, and food hubs for local or regionally branded products
  - US sales grew from $9 to $14 billion since 2017, an increase of over 55%
  - For Kansas, grew from $4.2 to $6.9 million or 64%
- Why? Not certain, but as far back as the 2015 USDA report (Low et al)
  - Key institutional buyer/market, school districts with farm-to-school programs, increased by 430%
  - Between 2006-2007 and 2015, the number of food hubs increased by 288%
    - Low et al (2015) also highlight that market intermediation is commonly an important part of scaling up for direct sales enterprises to transition to more viable wholesale models
  - Requires a shift in technical assistance and investments as local and regional marketing strategies evolve



Increasing Portfolio of Federal and State Purchasing Programs

- Colorado Department of Human Services (CDHS) Local Food Purchase Assistance Program (LFPA) through $12.5 million in federal funds
- CDHS Food Pantry Assistance Grant Program (FPAG) through $4.5 million in state funds
- Colorado Department of Education (CDE) Local Food for Schools Cooperative Grant Program through $2.6 million in federal funds
- CDE Local Food Pilot Program (LFPP) through $1.5 million in state funds

USDA REGIONAL FOOD BUSINESS CENTERS

Center purpose, design & What's Next!

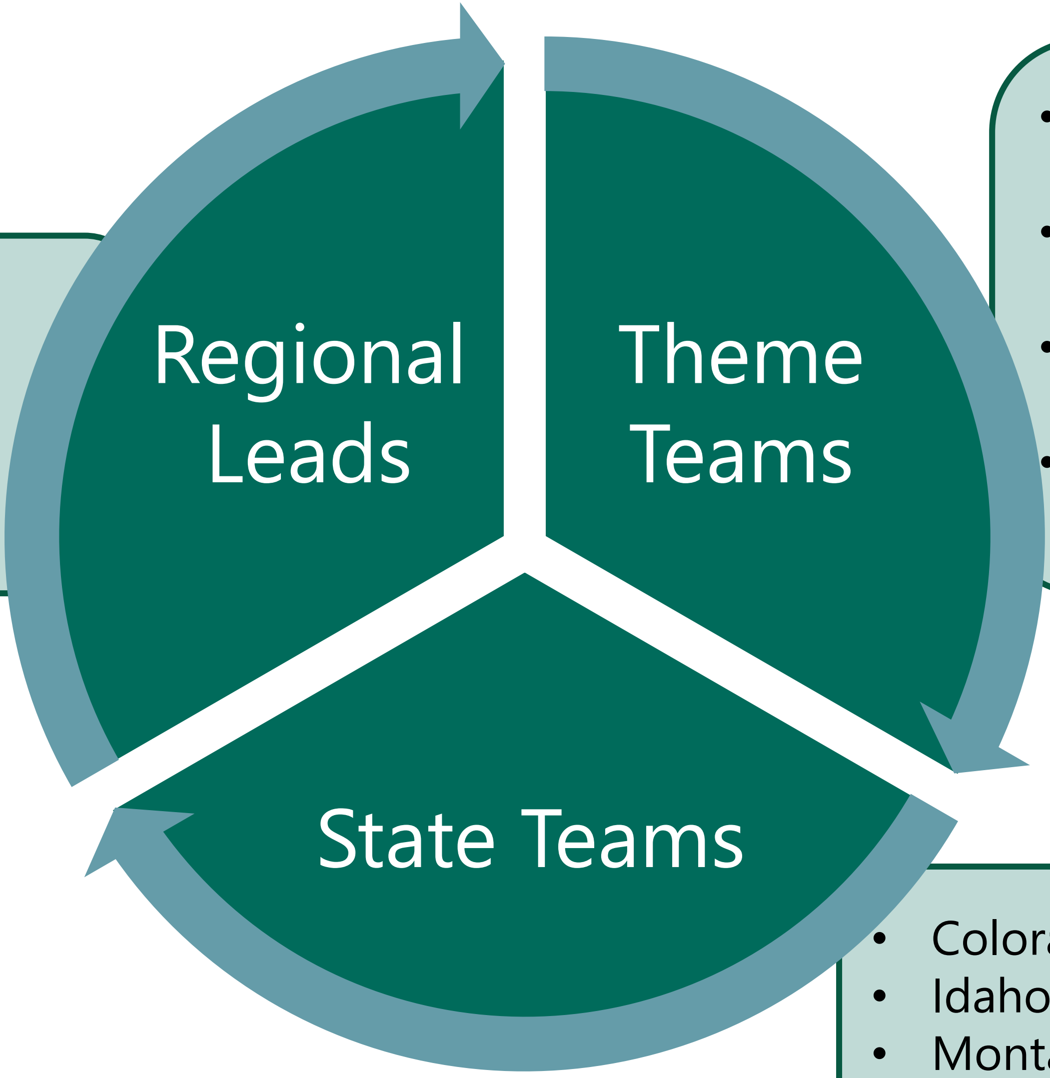
The USDA Regional Food Business Centers (RFBCs) are established to drive economic opportunities across their region, creating a more diversified and resilient food system.

RFBCs are designed to:

- Create opportunities for targeted, region-specific solutions.
- Maximize locally driven investment impact.
- Complement and support other USDA programs.
- Collaborate with USDA Agricultural Marketing Service to ensure ongoing, regionally appropriate support and coordination.

TA & Funding Opportunities

- Colorado State
- Oregon State
- USDA AMS



- Building Meat Supply Chain Capacity
- Creating Diverse Markets for Climate Resilient Ag
- Connecting and Scaling Food Entrepreneurs
- Supporting Right-Size Investing and Infrastructure

- Colorado
- Idaho
- Montana
- Oregon
- Washington
- Wyoming

Themes = cross-cutting focus areas

Supporting animal protein supply chains that respond more nimbly to changes in demand or supply

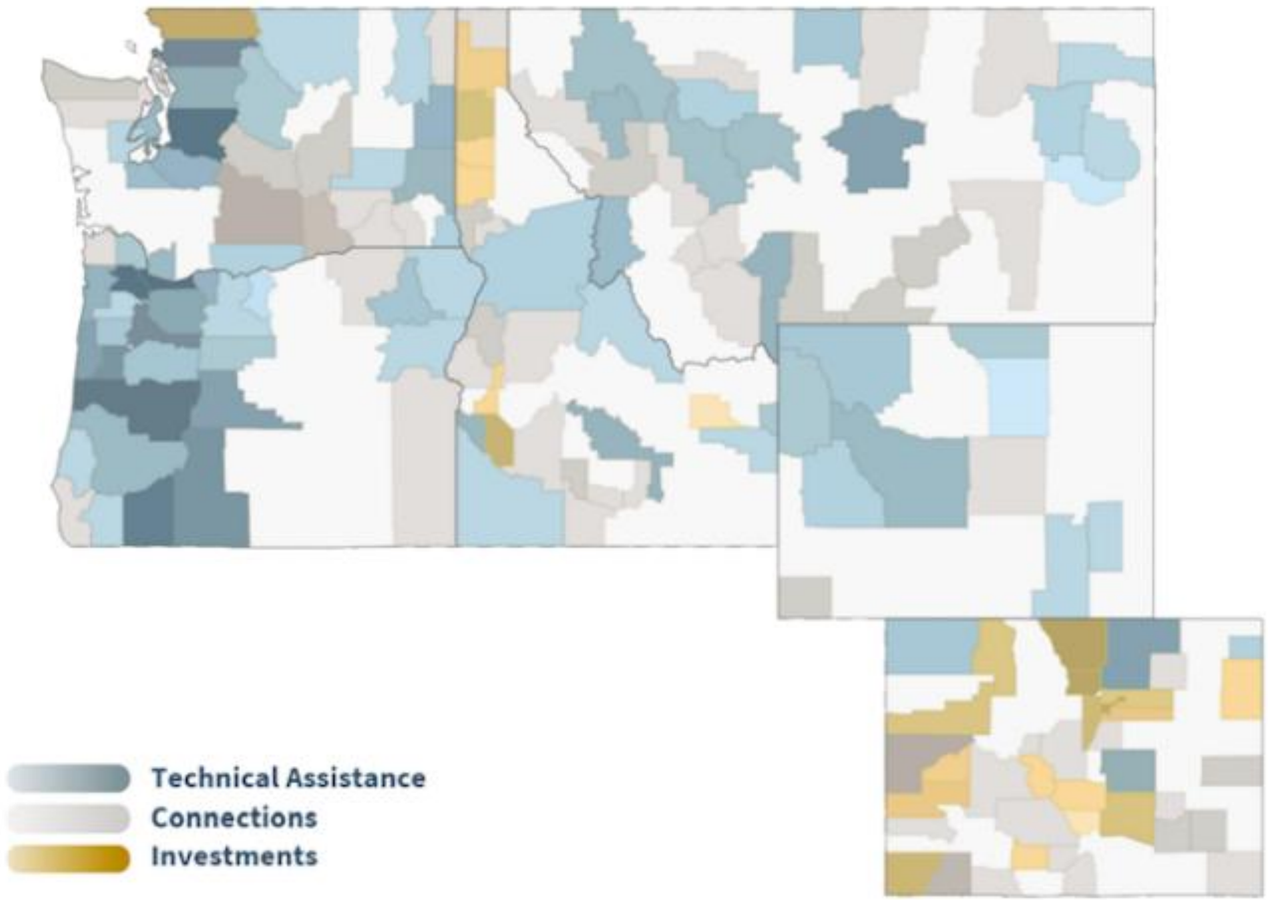
Assisting food entrepreneurs in successfully entering local, regional or national markets

Expanding and diversifying markets for climate resilient agricultural products

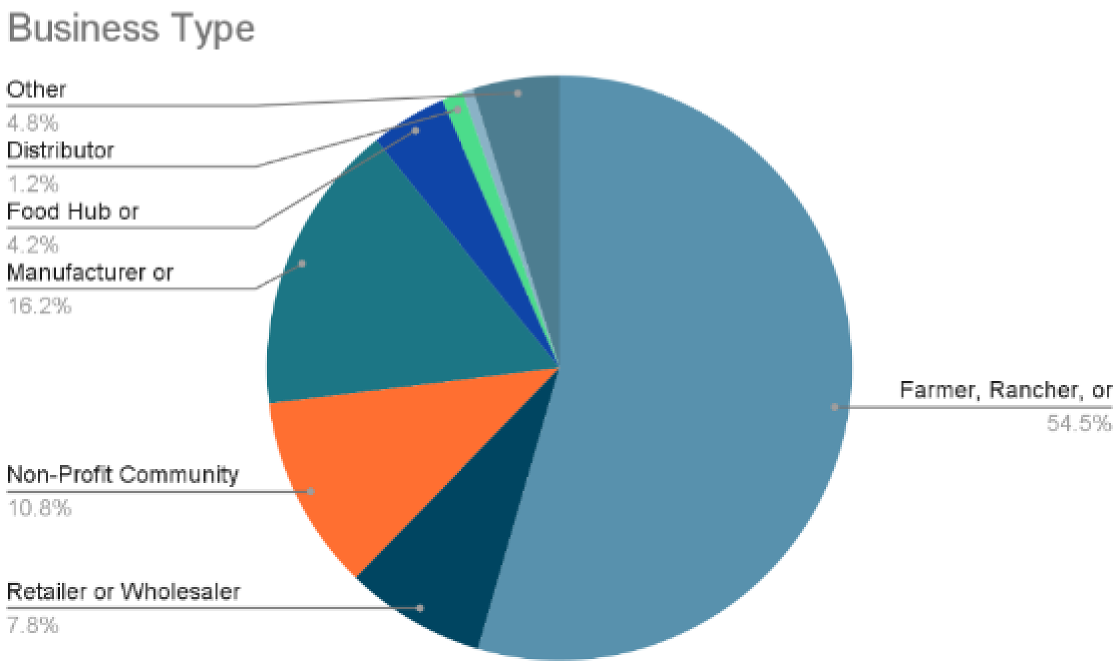
Supporting right-sized, appropriately targeted investment in food value chain infrastructure to enhance business success and long-term viability

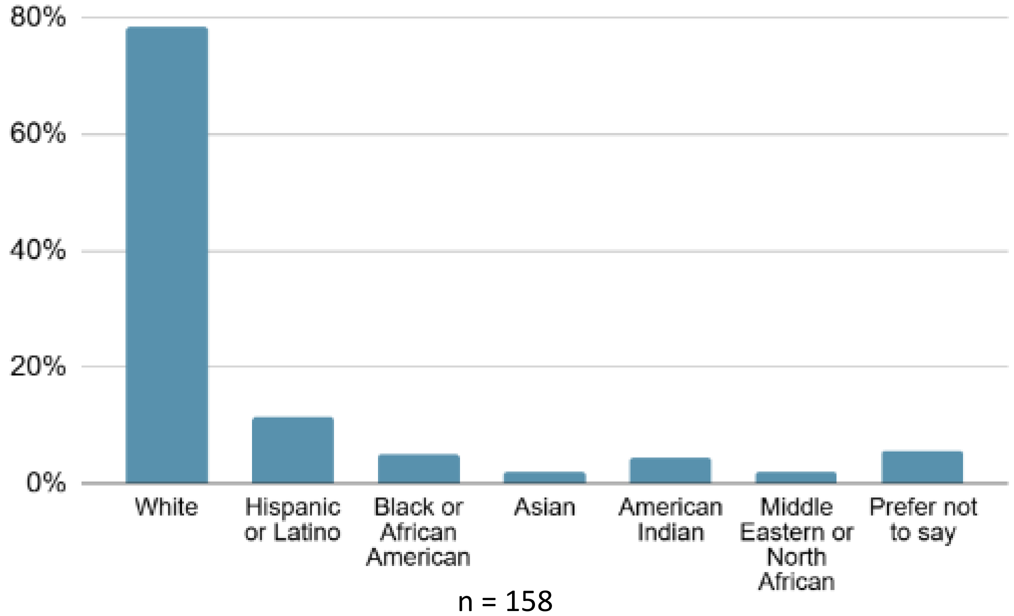
Colorado Activities

- Over 4000 contacts – some outside region
- Over 130 Biz Builder grants representing more than $2 million
- Meat Summit and Meat School (online)
- Over 50 Businesses sponsored at food shows
- Grain Summit-Salida March 2025



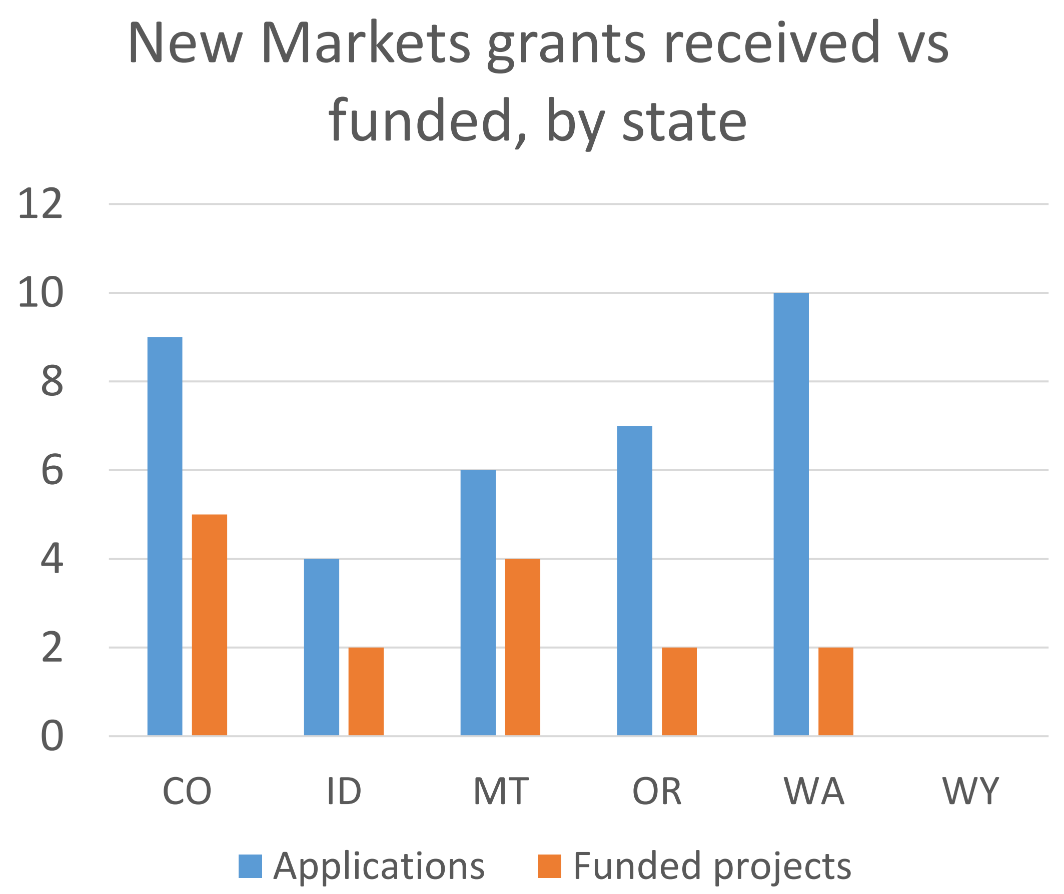
- 124 beginning operations (<10 years of experience)
    - 2017 average start date

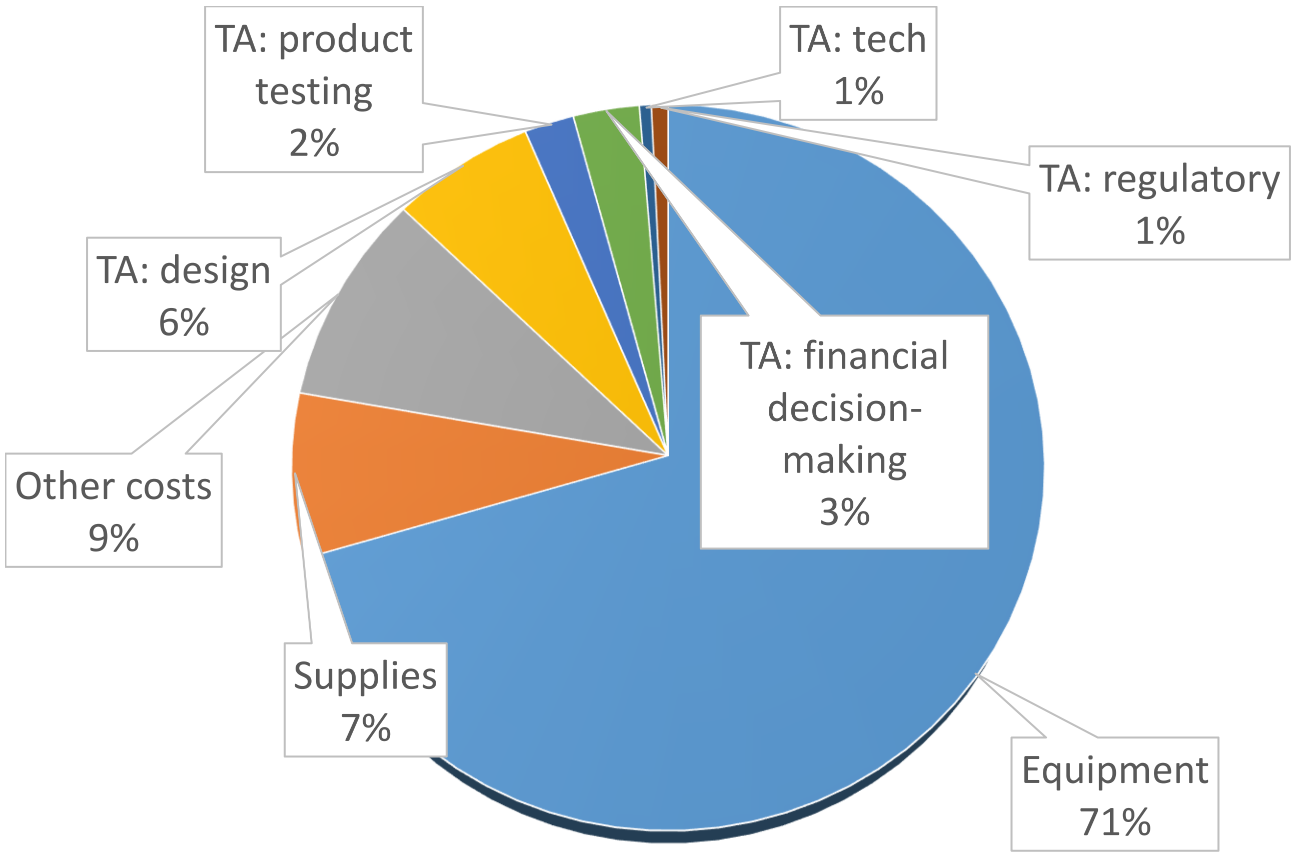




Fruit and Vegetable	109
Value-added Products	74
Meat	53
Poultry eggs	47
Grain/Forage	41
Dairy	26
Nursery	21
Tree nuts or Oil Seeds	12
Forage/Wild Harvested Foods	11
Seafood	5

Business Builder grant program support for new markets for grains, pulses and pseudocereals





New Markets funded grants, by expenditure category

USDA REGIONAL FOOD BUSINESS CENTERS NORTHWEST & ROCKY MOUNTAIN

Technical Assistance

COLORADO PROUD

Startup Colorado

USDA REGIONAL FOOD BUSINESS CENTERS NORTHWEST & ROCKY MOUNTAIN

Naturally COLORADO

FOOD AND AG ADDITION

FOUNDER COOPETITION

idea factory

Shared Kitchens

Biz Development Phases

Figure 2. How long have you been producing in a shared kitchen?

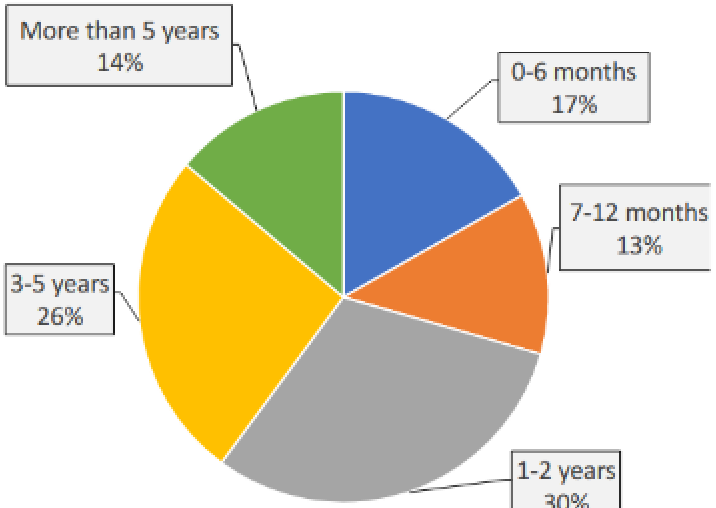


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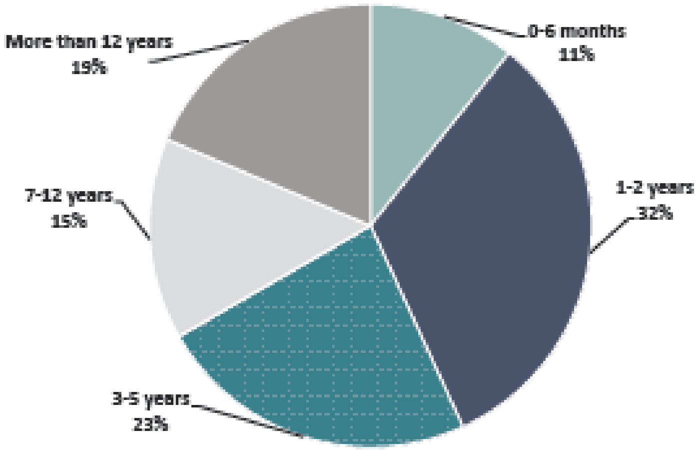
Figure 4. Years in the Shared Kitchen, When Operators Reported It Was Their Primary Occupation



Note: n=105, all respondents who chose "primary occupation" to the question on one's role in the business. Other options included: supplementary occupation, hobby, other, and don't know.

Tapestry Segment Profiles

LifeMode Group: Affluent Estates

Top Tier

1A

Households: 2,113,000

Average Household Size: 2.84

Median Age: 47.3

Median Household Income: $173,200

WHO ARE WE?

The residents of the wealthiest Tapestry market, *Top Tier*, earn more than three times the US household income. They have the purchasing power to indulge any choice, but what do their hearts' desire? Aside from the obvious expense for the upkeep of their lavish homes, consumers
scale salons, spas, and fitness centers for their
well-being and shop at high-end retailers for their
ffects. Whether short or long, domestic or foreign,
uent vacations spare no expense. Residents fill
kends and evenings with opera, classical music
charity dinners, and shopping. These highly
professionals have reached their corporate career
th an accumulated average net worth of over
dollars and income from a strong investment
many of these older residents have moved
ulting roles or operate their own businesses.

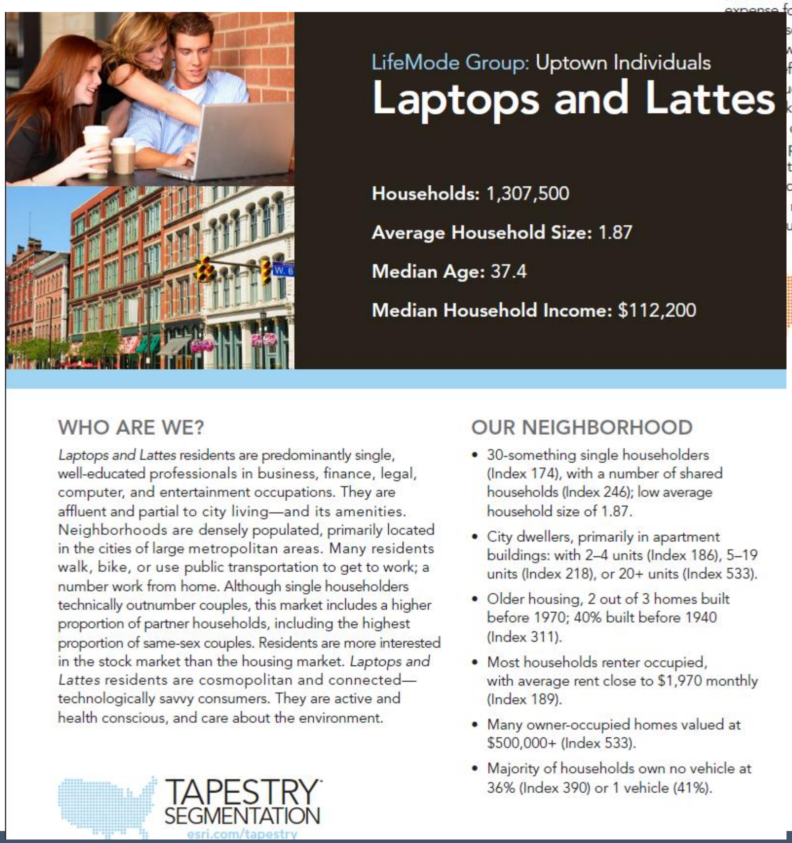
OUR NEIGHBORHOOD

- Married couples without children or married couples with older children dominate this market.
- Housing units are owner occupied with the highest home values—and above average use of mortgages.
- Neighborhoods are older and located in the suburban periphery of the largest metropolitan areas, especially along the coasts.

SOCIOECONOMIC TRAITS

- *Top Tier* is a highly educated, successful consumer market: more than one in three residents has a postgraduate degree.
- Annually, they earn more than three times the US median household income, primarily from wages and salary, but also self-employment income (Index 177) and investments (Index 251).
- These are the nation's wealthiest consumers. They hire financial advisers to manage th
stay abreast of curren
- Socially responsible co
lifestyle, they are goal
time for their kids or g
group of friends.
- These busy consumers
in the fine arts; read to
the Internet, radio, and
- They regularly cook th
good nutrition and fre

TAPESTRY SEGMENTATION
esri.com/tapestry



LifeMode Group: Uptown Individuals

Laptops and Lattes

Households: 1,307,500

Average Household Size: 1.87

Median Age: 37.4

Median Household Income: $112,200

WHO ARE WE?

Laptops and Lattes residents are predominantly single, well-educated professionals in business, finance, legal, computer, and entertainment occupations. They are affluent and partial to city living—and its amenities. Neighborhoods are densely populated, primarily located in the cities of large metropolitan areas. Many residents walk, bike, or use public transportation to get to work; a number work from home. Although single householders technically outnumber couples, this market includes a higher proportion of partner households, including the highest proportion of same-sex couples. Residents are more interested in the stock market than the housing market. *Laptops and Lattes* residents are cosmopolitan and connected—technologically savvy consumers. They are active and health conscious, and care about the environment.

OUR NEIGHBORHOOD

- 30-something single householders (Index 174), with a number of shared households (Index 246); low average household size of 1.87.
- City dwellers, primarily in apartment buildings: with 2–4 units (Index 186), 5–19 units (Index 218), or 20+ units (Index 533).
- Older housing, 2 out of 3 homes built before 1970; 40% built before 1940 (Index 311).
- Most households renter occupied, with average rent close to $1,970 monthly (Index 189).
- Many owner-occupied homes valued at $500,000+ (Index 533).
- Majority of households own no vehicle at 36% (Index 390) or 1 vehicle (41%).

TAPESTRY SEGMENTATION
esri.com/tapestry

LifeMode Group: Cozy Country Living

Green Acres

Households: 3,923,400

Average Household Size: 2.70

Median Age: 43.9

Median Household Income: $76,800

WHO ARE WE?

The *Green Acres* lifestyle features country living and self-reliance. They are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of *Green Acres* remain pessimistic about the near future yet are heavily invested in it.

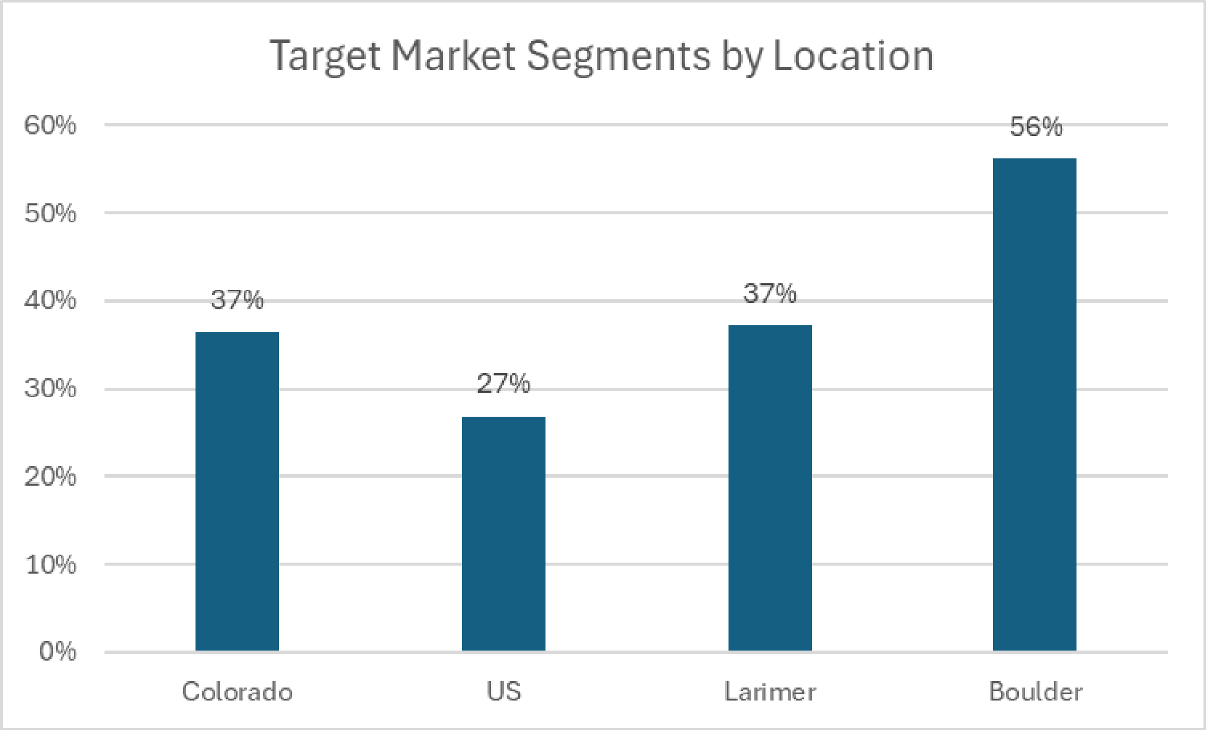
OUR NEIGHBORHOOD

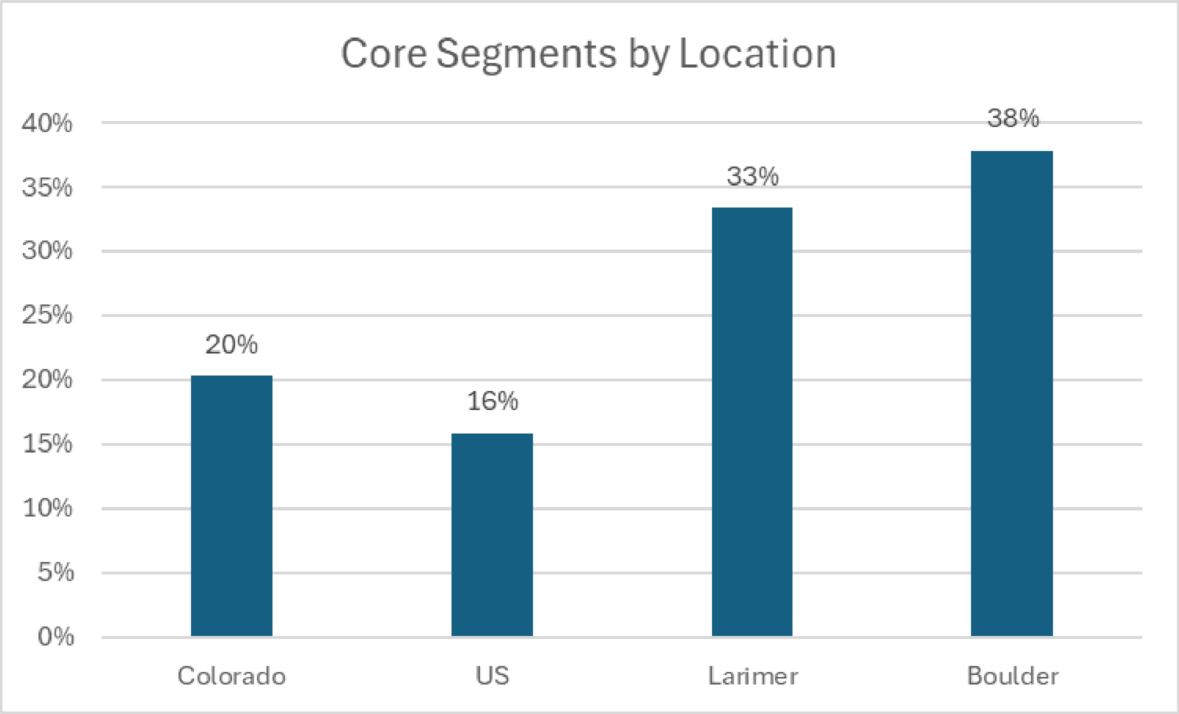
- Rural enclaves in metropolitan areas, primarily (not exclusively) older homes with acreage; new housing growth in the past 15 years.
- Single-family, owner-occupied housing, with a median value of $235,500.
- An older market, primarily married couples, most with no children.

Our Target Segment Values and Priorities

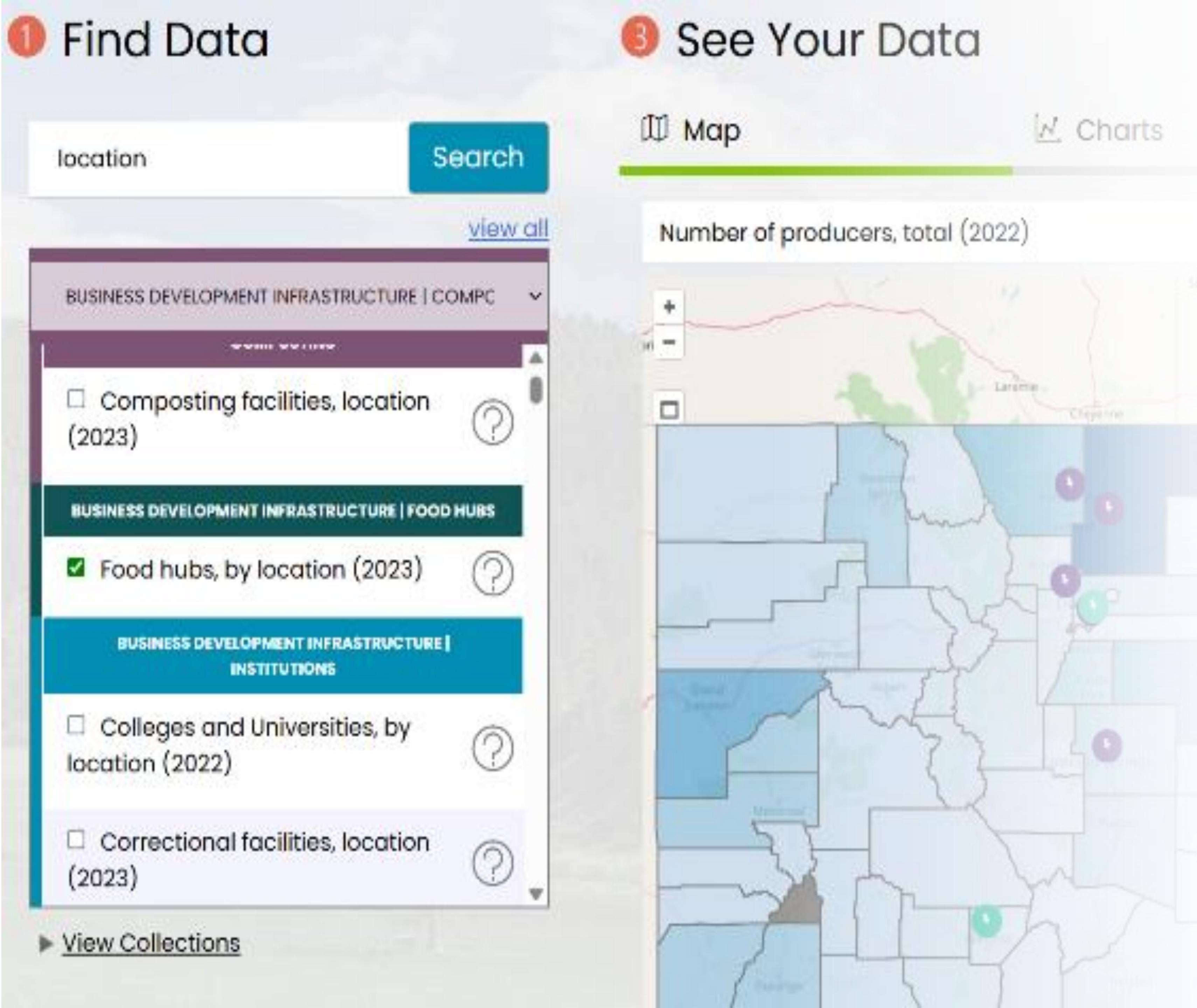
- Top Tier
- Professional Pride
- Boomburbs
- Savvy Suburbanites
- Exurbanites
- Urban Chic
- Pleasantville
- Enterprising Professionals
- Laptops and Lattes
- Metro Renters
- Trendsetters
- Comfortable Empty Nesters
- In Style
- Green Acres

Leveraging Tapestry Market Segments





Meet 2 out of 3 of the following household criteria (Core Segments meet all 3):
High income (>$70,000),
Mention food/environmental values,
High HH budget indexspent on food (mostly>110)



Empowering Communities

- **Food Systems Data Explorer**
- Stakeholder specific user guides
- Suggested resources
  - Extension Bulletins
  - Extension Programs
  - Funding resources
  - Contacts for deeper analyses

FOOD SYSTEMS
COLORADO STATE UNIVERSITY EXTENSION

Changing Priorities for Food Consumers and Policymakers

- Food Market Dynamics were catalyzed by COVID but may be settling into a new normal
- Ag, food and beverages are getting renewed policy attention in the context of economic and community development
- Resiliency, infrastructure, entrepreneurs, equity and access
  - Resiliency is an evolving concept ….
  - Risk management in a new light
  - Efficiency vs. stability
  - What are ag and food's "shock absorbers"?

AgNext
COLORADO STATE UNIVERSITY
SUSTAINABLE SOLUTIONS FOR ANIMAL AGRICULTURE

SCHOOL OF GLOBAL ENVIRONMENTAL SUSTAINABILITY
COLORADO STATE UNIVERSITY

Family Leadership Training Institute of Colorado

REDI@CSU
Regional Economic Development Institute

COLORADO grain chain

COLORADO PROUD

COLORADO Farm to School

BUILDING FARMERS
COLORADO STATE UNIVERSITY EXTENSION

ONE HEALTH INSTITUTE
COLORADO STATE UNIVERSITY

CSU SPUR

DOUBLE UP FOOD BUCKS

NOURISH COLORADO
Transforming Food Systems

Dr. Dawn Thilmany, Professor and Co-Director, REDI

Dept of Ag and Resource Economics
Northwest and Rocky Mountain USDA Food Business Center, Director
https://nwrockymountainregionalfoodbusiness.com/

Regional Economic Development Institute, https://csuredi.org/
Local Food Economics Community of Practice,
https://localfoodeconomics.com/

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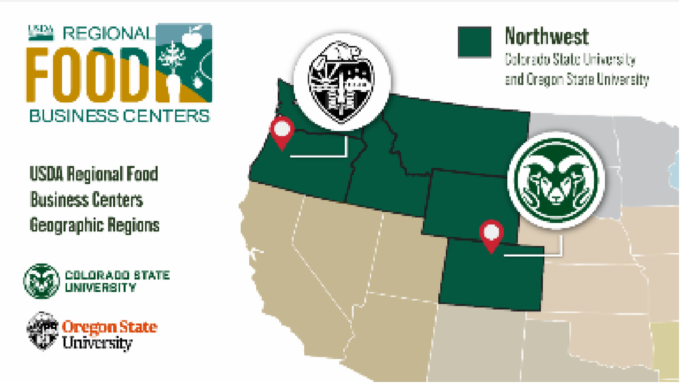
Regional Economic Development Institute



Appendices

COLORADO STATE UNIVERSITY
EXTENSION

Consumer Trends and Developments in the Regional Food System:

Highlights from A National Survey and Colorado Public Attitudes

Dr. Dawn Thilmany

Featuring Work by:

Mackenzie Gill, Hailey Edmondson, Libby Christensen, Becca Jablonski, Azita Varziri, Jairus Rossi and Tim Woods

Brought to you by:

USDA Agricultural Marketing Service

Colorado State University

ABOUT THE PROJECT

Enrich and expand existing efforts across LRFS responding to COVID

Document and disseminate innovations and adaptations

Cross-sector collaboration and learning

Strategize for long term resilience of LRFS

ABOUT THE TEAM

Multi-agency, multi-sector collaborative initiative

Cooperative Agreement with USDA AMS

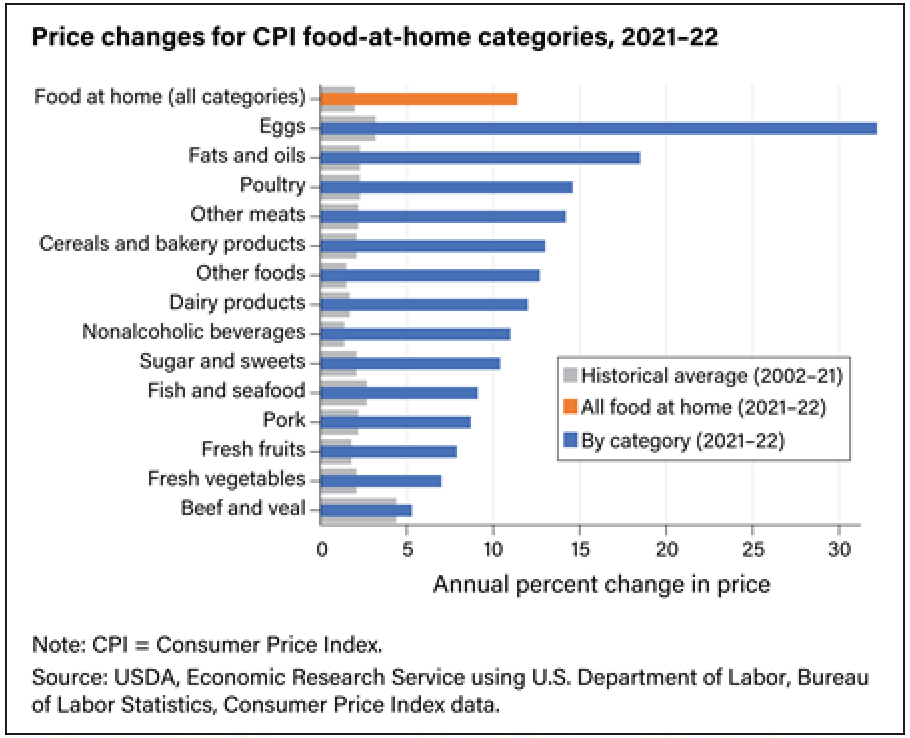
2 University Partners

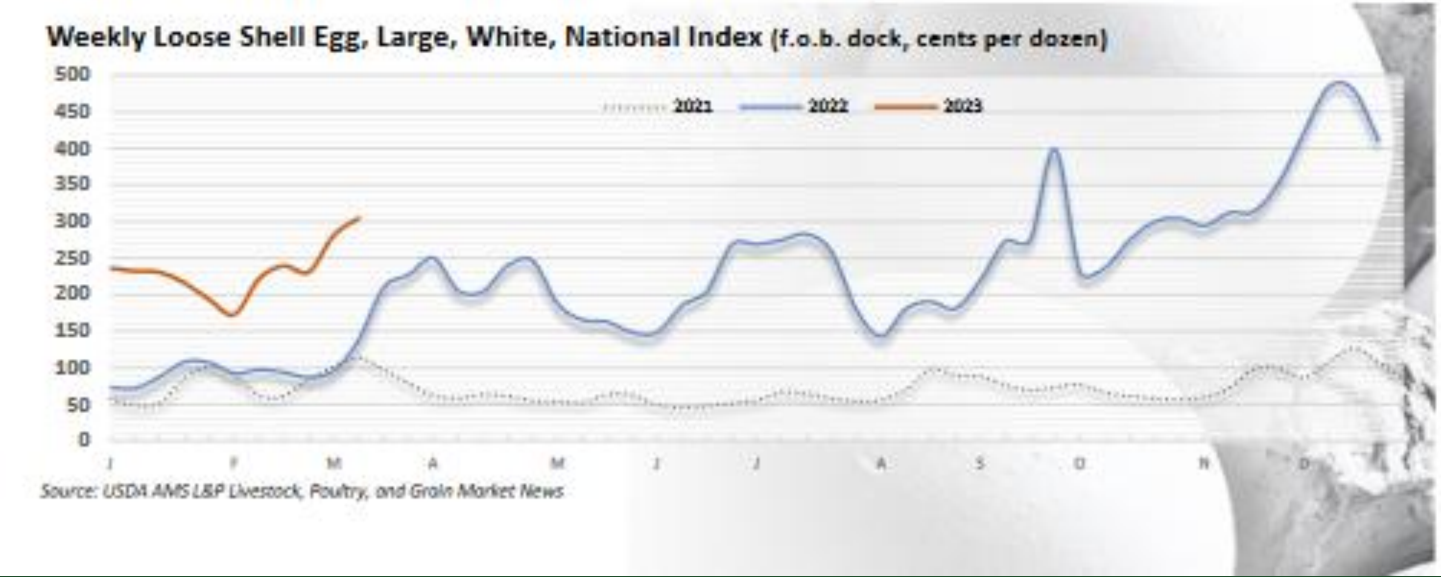
Community of Practice Coordinating Organizations

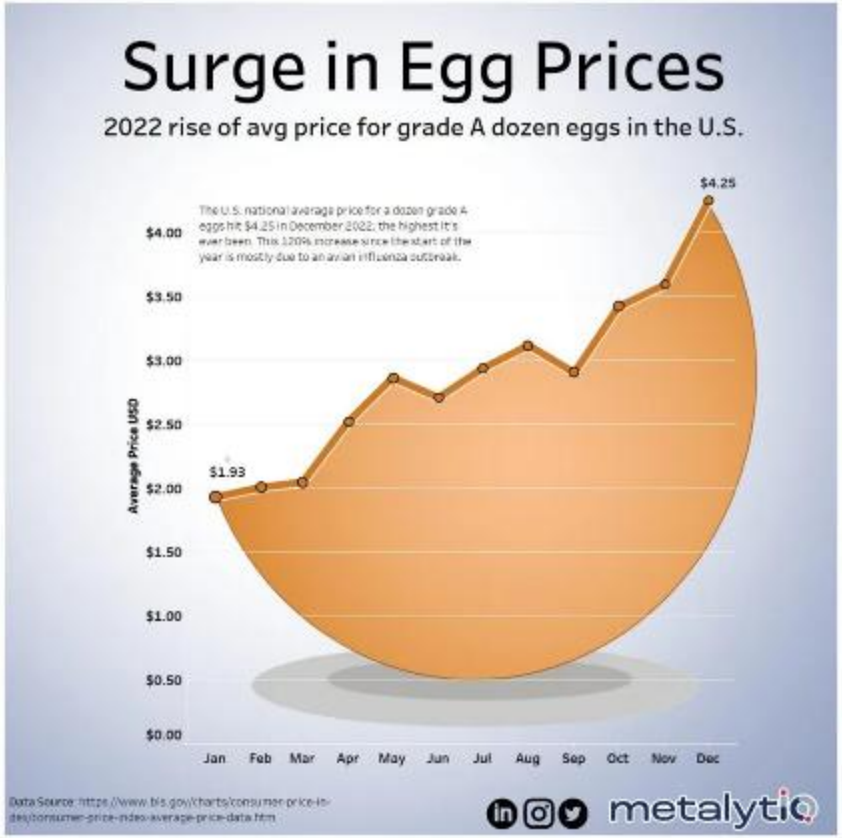
Visit our website for more details about the projects, resources for LRFS, and upcoming webinar information.

https://lfscovid.localfoodeconomics.com/

What is up with Eggs?







Consumer Food InsIGHTS 2.0

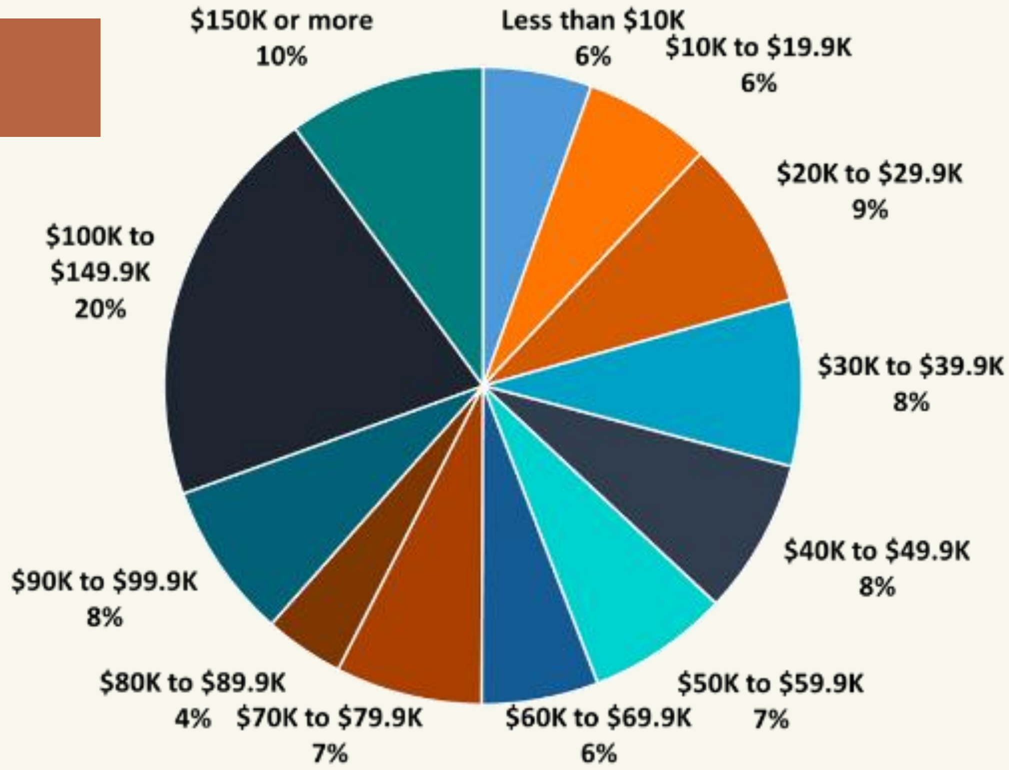
50% — **Women**

49% — **Men**

0.5% — **Self identified**

National survey including 5,000 households

Income



37%

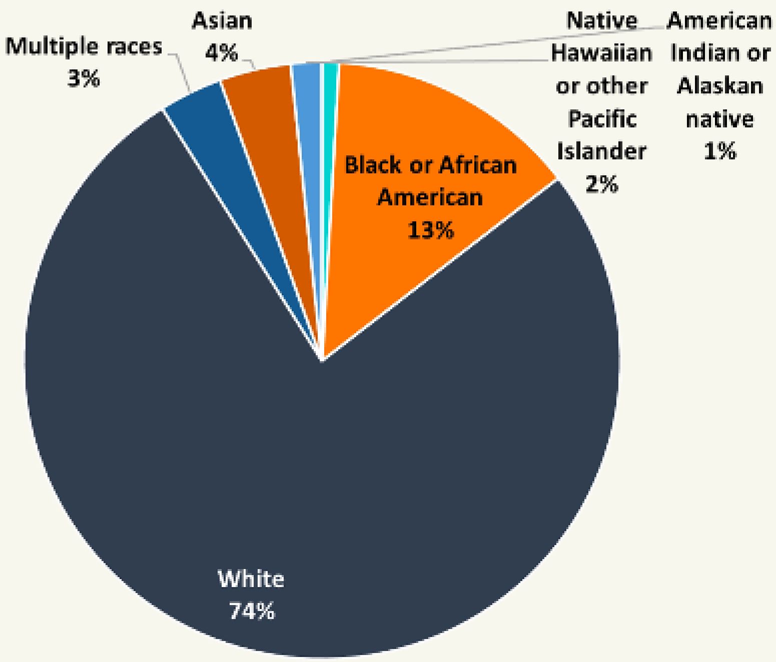
HH have a child under 18 at home

Households

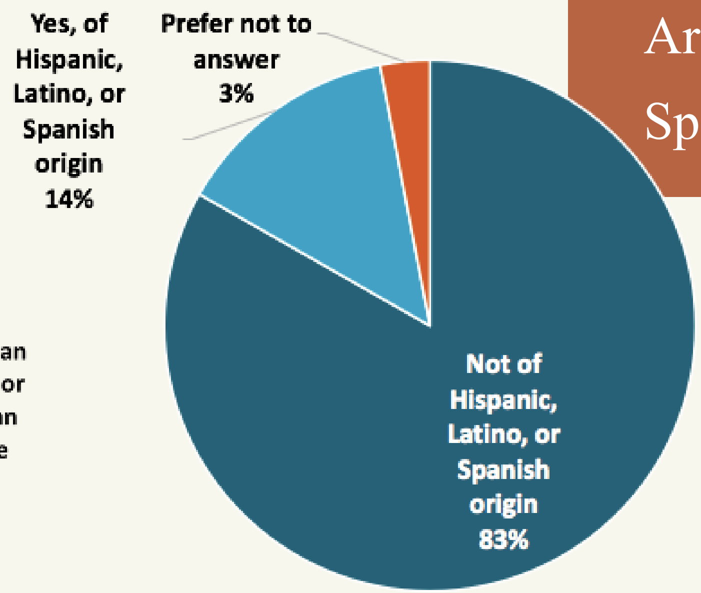
Consumer Food InsIGHTS 2.0

Race

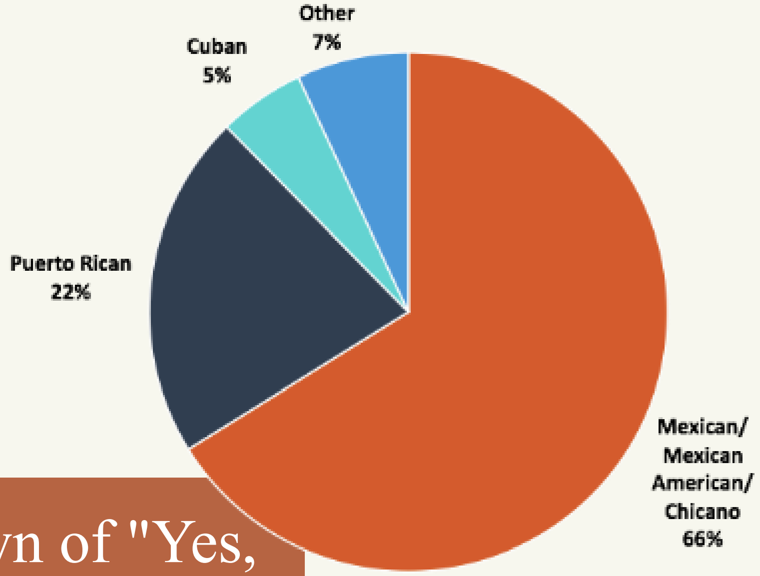
Note: 3% of respondents chose not to respond.



Are you of Hispanic, Latino, or Spanish origin?

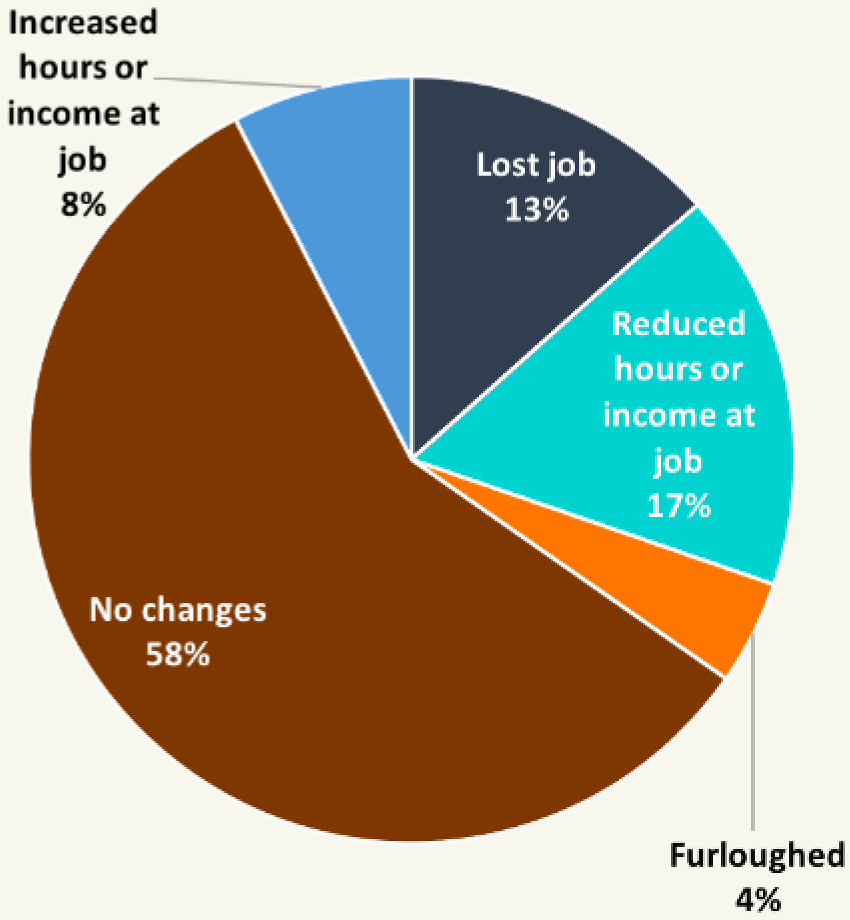


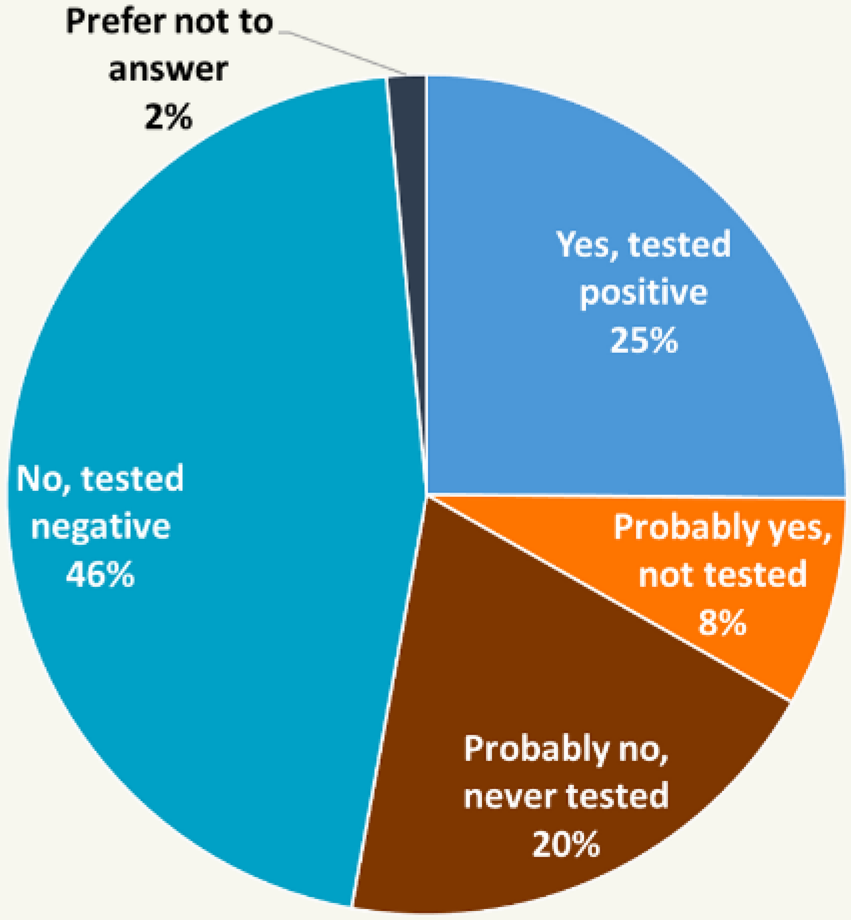
Breakdown of "Yes, of Hispanic, Latino, or Spanish origin"



Consumer Food InsIGHTS 2.0: Economic Impacts

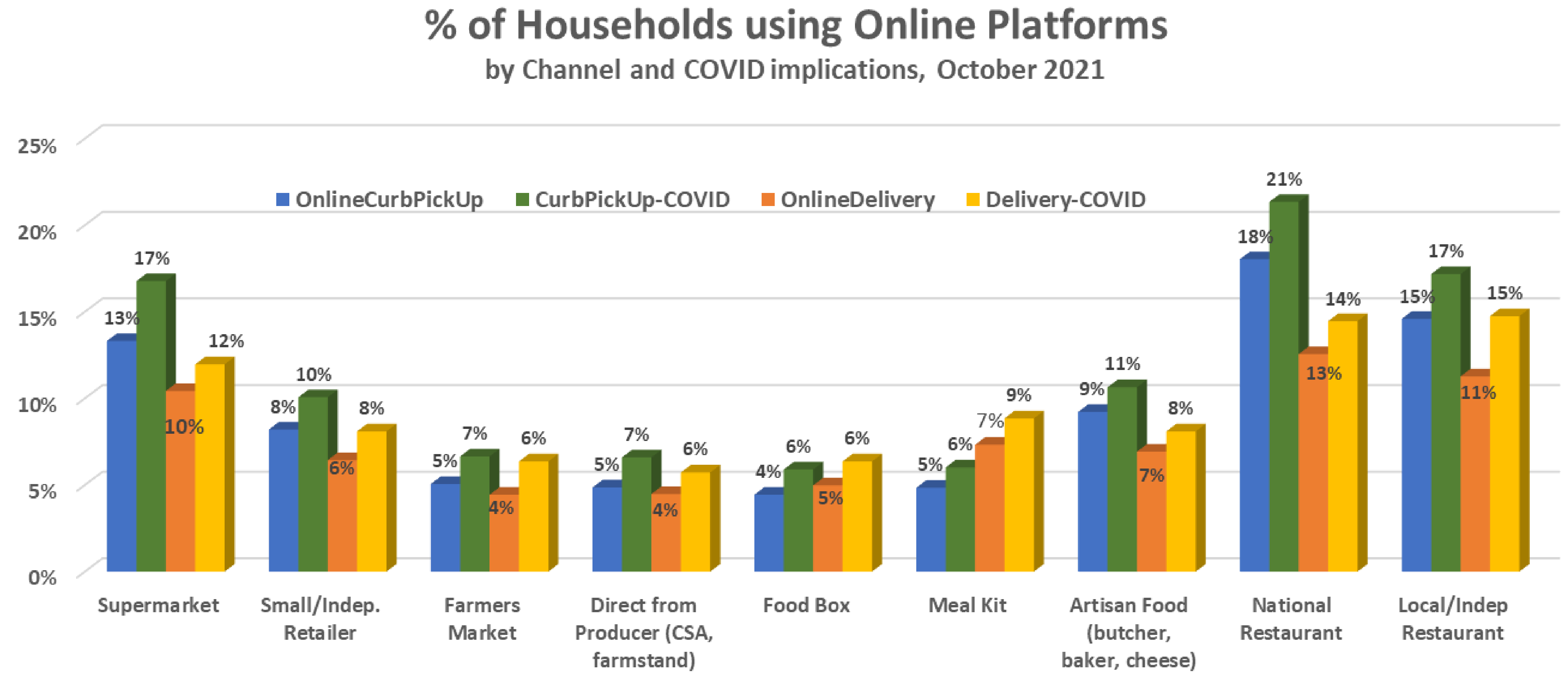
Household change in income or job since the COVID-19





Household exposure to COVID-19

Percent of households using online platforms by channel and covid implication (October 2020)

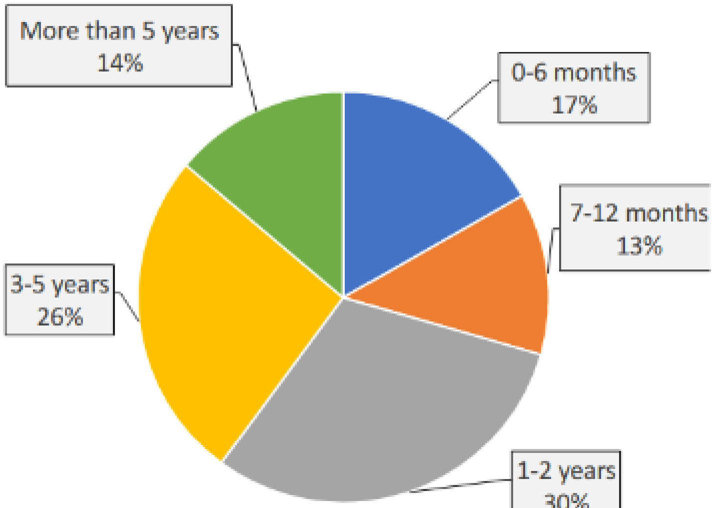


Note: COVID implications include someone in the household having COVID or at high risk of implications if they were to get COVID

Overview of Start Up

Biz Development Phases

Figure 2. How long have you been producing in a shared kitchen?



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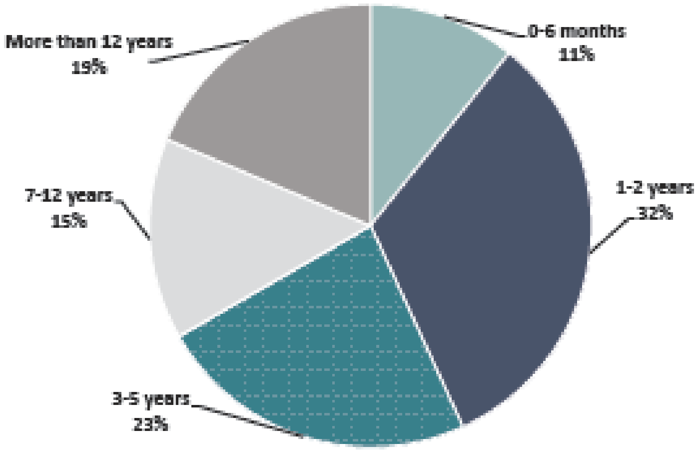

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Factors Influencing Establishment Location

Figure from The Tale of Two Food Supply Chains:
Exploring the Emerging Bimodal Structure of U.S. Food and Beverage Manufacturing