# Market Outlook: 2024 New York Food Buyer Trends

A project of:

CADE

Center for Agricultural Development & Entrepreneurship

In partnership with:

WILD TOMATO CONSULTING LLC
FOOD SYSTEMS | RESEARCH | DATA
VALUE CHAIN COORDINATION

CATSKILLS AGRARIAN ALLIANCE

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**Thank you to the 80 food buyers and distributors who participated in interviews and surveys. We appreciate their invaluable input which will allow CADE and peer-organizations to better assist our NYS farm & food business clients in marketing, sales and distribution.**


## CADE Vision:

Established in 1991, CADE envisions a vibrant, regenerative, and equitable food system in which locally owned agricultural businesses thrive and communities are nourished by healthy, sustainably produced food.

## CADE Mission:

CADE's mission is to increase the number and diversity of viable farm enterprises and related businesses across the supply chain in New York through technical assistance, education, mentoring, network-weaving, partnerships, advocacy, and research.


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# Purpose & Goals

The marketplace for local, New York-sourced food products has changed dramatically since the COVID19 pandemic. To better support New York's farm and food businesses to identify market channels, become "market ready", and secure sales, we recognized the need for taking a fresh look at evolving buyer needs, their challenges, and procurement preferences and requirements–from certifications, to types of products they need most, to price points, to packaging/labeling/specs, to delivery schedules, payment systems, and more. Yet connecting with buyers to clarify their needs proved difficult given the pandemic's "great resignation", where many of our buyer contacts were no longer around.

From February to May 2024, CADE partnered with Wild Tomato Consulting and The Catskills Agrarian Alliance to undertake a major outreach effort to New York buyers (and beyond) to learn more about their interest and commitment to buying local, their particular needs, and their longterm interest in getting "matched" with suppliers, namely our farm and food business clients who have world class, high quality, and nutritious local products! Ultimately, our goal is to connect our clients with these market opportunities.

We are delighted to share our findings publicly, resulting from interviews and surveys from 80 unique buyers–from wholesalers, to restaurants, to retail outlets, to institutions and distributors. While our outreach was not exhaustive, it represents a thoughtful sample size of buyers within the timeframe of our research with demonstrated commitment to local purchasing, and even a surprising readiness to be flexible based on supplier needs (e.g., farmer seasonality, price point, etc.).

We hope that this publication can be a useful tool not only for our farm and food business clients eager to prepare for a dynamic and competitive marketplace, but also for other agribusiness incubators and accelerators, economic development agencies, and researchers around New York who serve them.

*Note: CADE is intentionally not disclosing the names of buyers interviewed, who provided information confidentially.*

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Center for Agricultural
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Helping NY Farm & Food Businesses Grow!

# Research Methodology

CADE partnered with Wild Tomato Consulting (WTC) and Catskills Agrarian Alliance (CAA) to design a research plan that defined the overall outreach goals, identified the key buyer categories for outreach, defined the market geography, and aligned on appropriate research instruments. Buyers were identified through existing networks and relationships, CADE's previous buyer lists, cold outreach via desktop research, and through a snowball approach that asked each buyer interviewed for additional recommendations.

## Research Plan Overview

| RESEARCH INSTRUMENTS | REGION | AUDIENCE | INFORMATION GOAL(s) |
|---|---|---|---|
| Interviews (40+)<br>Survey | Focus on Upstate regions:<br>• Southern Tier<br>• Hudson Valley<br>• Capital region<br>• Central NY<br>• Mohawk Valley followed by NYC, and then distribution or aggregation opportunities in bordering states (VT, MA, CT, PA)<br>• Less focus on North Adirondacks, Western NY, and Long Island | • Grocery: Chain, Independent, Specialty, Co-op<br>• Farm stand<br>• Schools: K-12, Independent/ Private, College<br>• Distributors: Wholesalers, Food Hub/Aggregator, Buying club<br>• Restaurants: Chain, Independent<br>• Other institutions (Hospital, Seniors, Early Ed) | Interview: Collect input in 45 min virtual or phone conversations.<br>• Understand buyer procurement requirements in 12 key areas defined by CADE and CAA.<br>• Understand buyer flexibility in sourcing from new local suppliers and their willingness to work with local farms.<br>• Understand barriers NY buyers face in sourcing local product. |

The **12 key procurement areas** that guided the research were as follows:

- Needed products
- Minimum volume
- Specifications
- Certifications or other requirements
- Preference for regeneratively produced/climate-smart or MWBE products
- Expected delivery schedule
- Price expectations
- Cycles during the year when they take new supplier/vendor contracts
- How to join
- How payment works
- Current suppliers and distributors
- Perspectives on increasing procurement of local food for the long term

### Research Tools

A buyer interview guide with specific questions targeting procurement areas was designed and used to conduct all buyer interviews. An online buyer survey, mimicking the interview, was disseminated through CADE, WTC and CAA networks and emailed directly to Upstate New York economic development agencies, rural business networks, and over 35 chambers of commerce. Note that as the project developed additional procurement areas were added reflecting the information received from participants.

# NY Buyer Landscape Results & Analysis

### Response Overview Summary

Buyer interviews were conducted from February-April, 2024. In total, **124 buyers were contacted** directly by email and/or phone. **43 buyers were successfully interviewed**. An additional **36 unique buyers responded** to the survey. For the following analysis, all survey and interview input was combined, to **total 80 buyers.**

Buyer respondents represented 27 counties across New York and two from outside the state (ME and PA). The bulk of input came from Central NY, the Capital region, and the Catskills (see map of responses in Table 1). However, buyers from as far as Niagara County, Franklin County, and Suffolk County all provided input and interest in local procurement. Buyers were well represented among nine buyer types as well: Grocery (30%), Restaurants and Catering (23%), K-12 Schools/BOCES (19%), Food Hubs (10%), Distributors (5%), Colleges (5%), Hospitals/Other Institutions (4%), and Emergency Food and Manufacturers (each at 3%). See Table 1 for summary.

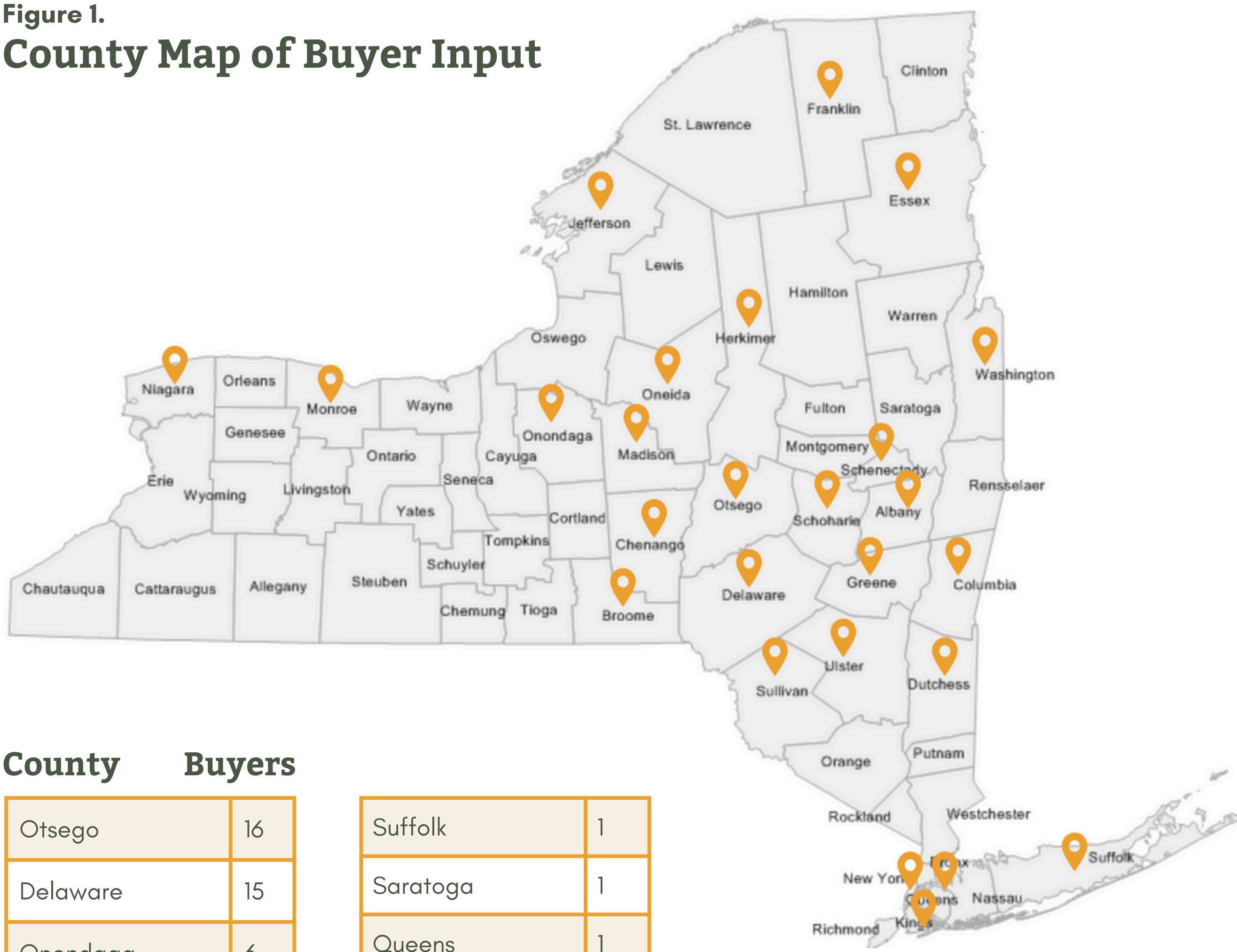
**Table 1.**

| Food Buyer Respondent Types | Count | % |
|---|---|---|
| Grocery (Includes: chain, independent, specialty and farm stores) | 24 | 30% |
| Restaurants and Catering | 18 | 23% |
| K-12 Schools / BOCES | 15 | 19% |
| Food Hub / Aggregator (includes: farm based aggregators) | 8 | 10% |
| Distributors (includes: specialty and wholesale distributors) | 4 | 5% |
| College/University | 4 | 5% |
| Hospital / Other institution (includes: retirement facilities) | 3 | 4% |
| Emergency Food | 2 | 3% |
| Manufacturer / Co-Packer | 2 | 3% |
| **Total Respondents** | **80** | |

"We're willing to pay what the market will absorb"

*Independent grocery store owner, 2024*

Figure 1.
## County Map of Buyer Input




| County | Buyers |
|---|---|
| Otsego | 16 |
| Delaware | 15 |
| Onondaga | 6 |
| Sullivan | 4 |
| Schoharie | 4 |
| Columbia | 4 |
| Oneida | 3 |
| New York | 3 |
| Albany | 3 |
| Schnectady | 2 |
| Kings | 2 |
| Washington | 1 |
| Ulster | 1 |
| Suffolk | 1 |
| Saratoga | 1 |
| Queens | 1 |
| Niagra | 1 |
| Monroe | 1 |
| Madison | 1 |
| Jefferson | 1 |
| Herkimer | 1 |
| Greene | 1 |
| Franklin | 1 |
| Essex | 1 |
| Duchess | 1 |
| Chenango | 1 |
| Broome | 1 |
| Outside NY (ME, PA) | 2 |

"[I] want to balance the connection between the chef and the market. [I] want to give access to these items to all. [I] believe in all of these [pricing] options, not one single strategy. [I] want to provide accessible food to all."

*Restaurant Interview, 2024*

# Trends: Local Purchasing Landscape

## Local Procurement & Supplies

Out of 80 buyers, 71 (90%) reported currently purchasing local items. For this study, local was defined as grown in NY (Figure 2). There were 6 buyers who reported they weren't currently purchasing local products - these buyers mentioned they were either not buying products (right now / today) or that they purchased in the past but were not currently. Their voluntary participation and interest in this project indicated they were exploring the possibility of purchasing local foods in the future or were just waiting for products to become seasonally available.

Buyers reported their top suppliers of local product as distributors (63%), producers/farmers (60%), and food hubs (29%). Fifteen percent reported purchasing local product directly from farmers' markets and 8% reported getting product from a co-op or a food service contractor. No buyers reported getting local product from a broker service. (Table 2).

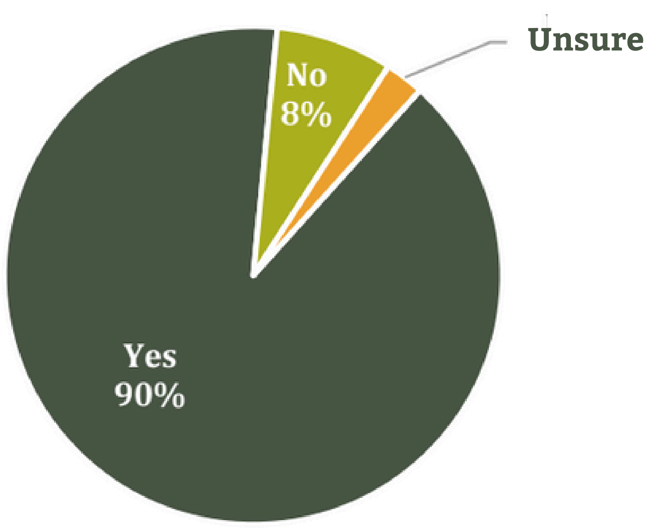



**Figure 2**
**Buyers Currently Purchasing Local Products**

**Table 2.**

| Suppliers of local products | Count | % |
|---|---|---|
| Purchase via a distributor | 50 | 63% |
| Purchase directly from producer or maker/manufacturer | 48 | 60% |
| Purchase from a food hub or aggregation source | 23 | 29% |
| Purchase via a market (farmer's or other) | 12 | 15% |
| Purchase directly from a co-op or related grouping of producers or makers | 6 | 8% |
| Purchase via a food service contractor (FSC) | 6 | 8% |
| Purchase via internal distribution channels (institutional buyers only) | 4 | 5% |
| Not applicable | 3 | 4% |
| Purchase via a broker | 0 | 0% |
| Total respondents | 80 | |

"We have the ability to look long term and are happy to make commitments for the future with the right farm(s )"

*College Food Service Interview, 2024*

**There were 48 buyers (60%) who reported buying directly from producers**. This group of buyers may be of high interest to CADE's clients who prefer to work directly with a buyer instead of going through an intermediary. **Restaurants and Food hubs were the largest of this group** by percentage (78% of each of these buyer categories reported buying directly from producers), **followed by manufacturers and grocery stores**. The one emergency food buyer also reported buying direct from producers.

Buyers mentioned over 100 different supplier names, both local and non-local, during interviews and surveys. Suppliers ranged from individual farmers and businesses to food hubs to wholesale distributors.

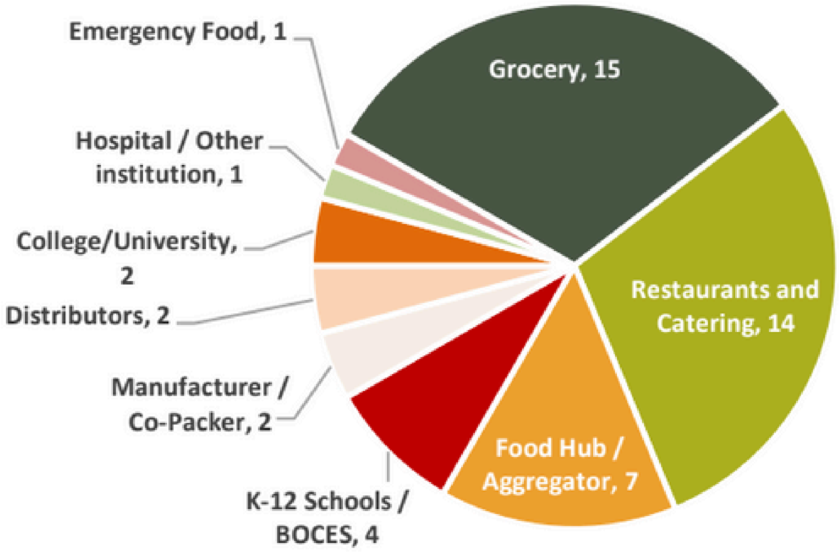



**Figure 3.**
**Buyers Who Purchase Direct from Producers (by count)**

## Flexibility towards working with local suppliers

Buyers were asked, in lieu of a specific certification or requirement, if they would be willing to accept a written attestation from a supplier describing their production, food safety and/or growing practices. Since many small/beginning farmers or businesses may not have the resources to secure official certifications (like GAP, USDA Organic, NY Grown and Certified, etc.), but may be adhering to or even going above and beyond what the certifications claim – this was used as an indicator to understand how willing a buyer is to working with a small or local producer. Buyers were also asked if they were willing to adjust their specifications, requirements or menus in order to work with local farmers or purchase seasonally. This question, in combination with the previous one, was used as a proxy to understand a buyers' overall willingness to be flexible with small or local producers.

**Table 3.**

| Buyer Flexibility | Count | % |
|---|---|---|
| Willing to accept attestation | 69 | 86% |
| Willing to adjust specs/menus for local | 66 | 83% |
| Total respondents | 80 | |

"Very hard to find dry local beans....there are no local NY grains..."

*Catering Interview and K-12 School Interview, 2024*

Buyers reported high flexibility and willingness to work with local suppliers. Out of 80 buyers, **69 (86%) reported they would be willing to accept a written attestation in lieu of a certification and 66 (83%) said they would adjust their specs/menus to work with local suppliers** (Table 3). The only reservations were around food safety, as a handful of buyers mentioned that safe handling or processing of food was not negotiable. Of the few buyers that said they were unwilling to accept an attestation, the certifications they reported requiring were GAP, HACCP, Halal, and meat processed in a USDA slaughter facility. It should be assumed that any food buyers purchasing or selling meat products would require the meat to have been processed in a USDA facility, as this is required by law.

## Perceived challenges working with local suppliers

Buyers were asked what types of challenges they faced when purchasing local products. Out of the 80 buyers, the **top challenge mentioned was pricing and cost of products (58%)**. This was followed by timing or seasonality of products (30%), volume (28%), and distribution/logistics (25%). Professional skills of suppliers and traceability were mentioned the least by buyers (Table 4).

A number of buyers also mentioned supplier communication as an important factor in building relationships and was reported as sometimes a barrier. In interviews, buyers discussed the importance of being able to provide more forecasting, "long lead times" and predictability of product availability. Consistency was mentioned repeatedly in interviews regarding both product availability and clear communication. Some additional experiences and considerations mentioned by interviewees – that were not in the survey – are summarized below:

**Table 4.**

**Challenges purchasing local products**

| | Count | % |
|---|---|---|
| Pricing – budget won't allow for local purchasing | 46 | 58% |
| Timing – seasonality of produce does not align with consumer demand | 24 | 30% |
| Volume – unable to fill the quantity needed or consistently provide product | 22 | 28% |
| Distribution / Logistics | 20 | 25% |
| Effort – too much effort required on my part to find and source local | 19 | 24% |
| Diversity of product– not enough selection | 16 | 20% |
| Quality – product does not meet grading standards or is inconsistent | 15 | 19% |
| Packaging/Specifications – suppliers can't meet spec requirements for packaging, labeling etc. | 15 | 19% |
| Professional skills of suppliers – unprofessional or poor communication | 5 | 6% |
| Traceability – suppliers can't meet traceability requirements | 2 | 3% |
| Total respondents | 80 | |

**Budget and Regulatory Compliance:** Some schools are facing issues due to losing aid from NY State, leading to budget constraints (this is unrelated to the 30% initiative). There are worries about FSMA 2024 and food safety regulations potentially affecting local purchasing, including concerns about new GAP certification requirements which could affect grocery stores that have Direct Store Delivery.

**Distribution and Logistics:** Challenges include the cost and human power required for distribution, as well as the need for refrigerated trucks and logistical coordination.

**Product Consistency and Quality:** Concerns regarding the consistency, availability, and quality of local products, especially perishable items. Some challenges ensuring correct labeling and consistent pack sizes for easier distribution.

**Communication and Forecasting:** Need for improved communication with farmers and better forecasting of orders. Sales predictability and long lead times for local products are issues, impacting ordering and inventory management.

**Ordering Complexity and Technology:** Difficulty managing orders from multiple sources, with a preference for streamlined processes like those offered by Baldor. Difficulties for farms in implementing online vendor portals due to IT requirements.

**Pricing and Margins:** Some buyers reported that local products are significantly more expensive, making it challenging to maintain standard retail margins.

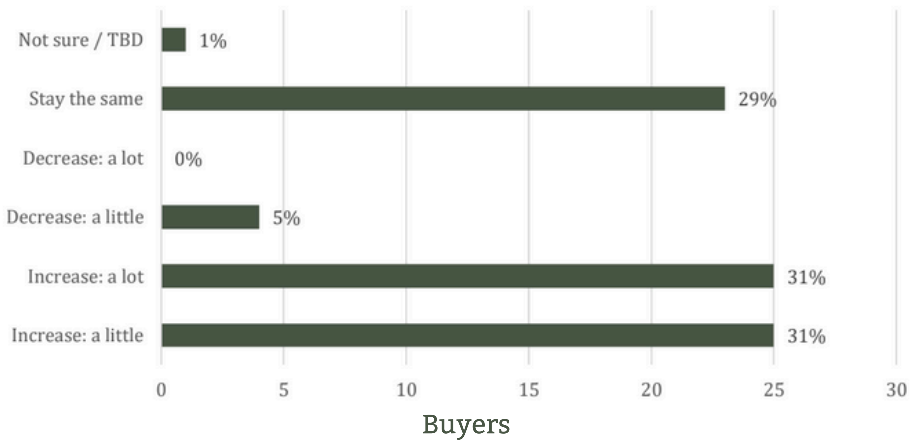
**Labor and Processing:** Labor-intensive processing of local products, including cleaning, washing, and prepping can be a challenge. Strong desire for pre-washed items. Labor involved in the logistical coordination of local procurement was also mentioned.

**Storage and Perishability:** Issues related to storage of local product if the buyer is also a small entity. Limited capacity to handle perishable items and the need to purchase small amounts due to being a small retailer or restaurant.

## Future local procurement trends

Buyers were asked if they predicted their local procurement to increase or decrease based on their purchasing habits of the last two years (Figure 4). Fifty (63%) buyers reported that their local purchasing would increase next year and only 4 mentioned that it would decrease. Twenty two (28%) predicted that it would stay the same.

**Figure 4.**
**Furure Local Procurement Trends**



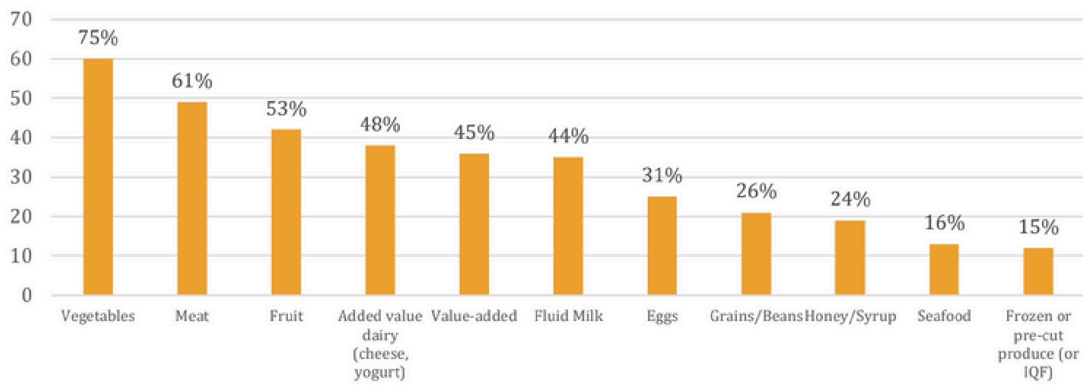

> "Quality is most important. Will pay a premium for quality."
>
> *Specialty grocery store Interview, 2024*

# Trends: Desired Products, Specs & Requirements

## Top local products

Top local products desired by buyers were vegetables, meat, and fruit. Value-added dairy, like cheese and yogurt, and other value-added products like breads, sauces, jams, and canned tomatoes were also of high interest (See Figure 5 and corresponding table for summary). Buyers consistently reported their interest in identifying more NY-grown fresh fruits and vegetables, but also a growing interest in ready-made, jarred and value-added locally made items. Local fluid milk was requested across all buyer types – especially schools – but value-added dairy like cheese, ricotta, yogurt and butter were of particular interest among restaurants and grocery stores.

**Figure 5.**
**Top Local Products**




***Top mentions in each category (full list of mentions in Appendix)***

| Top vegetables | Top Meats | Top Fruits | Top Grains | Top Value-Added | Top frozen |
|---|---|---|---|---|---|
| • Lettuce (Iceberg, salad mix, arugula, romaine, greens of all kinds)<br>• Potatoes<br>• Tomatoes<br>• Carrots<br>• Squash<br>• Onions | • Beef (especially ground)<br>• Chicken<br>• Pork<br>• Lamb<br>• Sausage or Bacon | • Apples<br>• Strawberries<br>• Pears<br>• Blueberries<br>• Peaches | • Dry Beans (Kidney, Navy, Cranberry, Lima, Black, Cannelini, Chickpeas)<br>• Flour<br>• Oats | • Bread / baked goods<br>• sauces (includes BBQ, ketchup, mayo, mustard)<br>• Jam/Jelly<br>• Canned tomatoes / sauce<br>• Crackers / snacks<br>• oils and vinegars<br>• Pickles/kraut | • Frozen green peas<br>• Frozen green beans<br>• Frozen corn<br>• Diced vegetables<br>• Frozen squash |

Findings of note included the number of mentions of **dry beans** of all varieties (see table above), the number and diversity of **value-added items** and the expressed desire for **frozen and pre-cut produce** (particularly apple slices). Fruit was consistently mentioned as a highly desired item and a particular procurement challenge in upstate NY, due in part to its seasonality and the NY climate. **Lettuce and potatoes** were also highly sought after items, especially by volume.

## Products unable to find locally

Buyers were asked if there were products that they would like to purchase locally but could not find or had a hard time procuring. Over 80 items were mentioned (see Appendix for full list). The top products mentioned aligned with buyers' most purchased local items – fruits (of any kind) were at the top of the list. Followed by vegetables, local dairy products, tomato sauce, meats and poultry (specifically chicken breasts), and lettuce. However, the list of specific products requested were varied and diverse ranging from tin fish, hot peppers, gluten free oats to cheese curds, whole wheat pasta and frozen prepared foods (see Appendix table with full list). In sum, buyers are interested in procuring NY grown or made products from every food category. This confirms the need for matchmaking support in the region, as many of these products are already being produced and grown in NY – they just need to be connected to the buyers who want to purchase these goods.

**Table 5.**

| Specification Requirements Summary | Count | % |
|---|---|---|
| Labeling specs | 28 | 35% |
| Portioning specs (bulk vs retail | 23 | 29% |
| Packaging specs | 22 | 28% |
| Palletizing | 11 | 14% |
| Processing specs | 5 | 6% |
| Total respondents | 80 | |

**Table 6.**

| Food Safety Specs | Priority | Required | % |
|---|---|---|---|
| On-farm food safety plan | 22 | 2 | 30% |
| Processed/slaughtered in a USDA facility | 19 | 7 | 33% |
| HACCP certified | 14 | 4 | 23% |
| GAP and/or GHP certified | 13 | 4 | 21% |
| Allergen free/peanut free | 7 | 0 | 9% |

## Specifications & Certifications

A key area of inquiry for this project was to understand what the packaging, labeling, specifications and certification requirements are of buyers in order to understand how NY producers can adapt or meet these specs to access more markets. While some buyers had very specific requirements for packaging or labeling, most specifications were flexible and only about a third of buyers reported detailed specs. Thirty percent of buyers reported having labeling requirements which included ingredient lists, allergens, producer name/traceability, and dates/best by (Table 5). For portioning specs, "bulk volumes and packaging" were called out by K-12 schools, restaurants, and aggregators while retail-ready portions or small portions were requested by small independent grocers and farm stores, and some smaller schools and small restaurants. K-12 Schools and chain grocery stores were the only buyers who requested pallets. Processing specs were only mentioned by those who wanted 'minimally processed items'.

**Table 7.**
**Top Certifications**

| | | | |
|---|---|---|---|
| USDA Organic | 16 | 1 | 21% |
| Pasture Raised | 9 | 0 | 11% |
| Certified Humane | 9 | 0 | 11% |
| Fair Trade | 13 | 0 | 16% |
| Regeneratively grown | 12 | 0 | 15% |
| Climate smart | 10 | 0 | 13% |

Buyers reported whether they prefer to pick up or receive product. Distribution was named as one of the top challenges buyers face when procuring local products and over a third (39%) of buyers reported that suppliers must distribute or drop off their products themselves (Table 8). Even more buyers said it must be at a specific time of day or day of the week (43%). Only 13% of buyers said that they will pick up product from suppliers and 8% said they would actually prefer to do so. This points to the need for local businesses to solve their own distribution strategies in order to reach new market channels. It should be noted though, that the food hubs and aggregators that provided data into this project provide distribution solutions for small producers.

**"We pick up products from farmers/suppliers" are buyers who are willing and/or able to pick up product directly from a supplier. This may include schools with a farm to school coordinator who is driving around picking up items for their taste tests OR grocery stores with refrigerated vans that are willing to pick up items etc. "Pick up AND distribute" refers to buyers who will pick up product from a farm and also be responsible for its sales/marketing (i.e. distribution) -- these are food hubs, or distributors, or aggregators who have these capabilities.*

**Food safety specifications were prioritized more than other types of certifications**, and were more likely to be 'required' than other types as well (versus just 'nice to have'). On the whole, over 30 different certifications were mentioned by buyers as desired product attributes, however very few were required in order to sell to a buyer. Of those certifications that were mentioned most, USDA Organic, Fair Trade, Regeneratively grown, and Climate Smart rose to the top (Table 7). But only one buyer said that products had to be USDA Organic. Note that 6% of buyers prioritized MWBE certified products, and 5% of buyers prioritized Kosher and Halal certified products, respectively.

This speaks to the overall flexibility that buyers expressed during this project. Eighty five percent of buyers reported a willingness to work with producers who may not meet all the specs desired but who could vouch for or share their practices or product qualities in other ways – a key indicator of a buyer's ability to source locally.

**Table 8.**

| Distribution & Delivery Requirements* | Count | % |
|---|---|---|
| Farmer/supplier must deliver product at a specific time of day and/or specific day | 34 | 43% |
| Farmer/supplier must distribute or drop off product | 31 | 39% |
| Did not specify | 21 | 26% |
| We pickup and receive product from farmers/suppliers | 10 | 13% |
| Farmer/supplier must be able to drop off product at a loading dock | 6 | 8% |
| We prefer to pick up AND distribute product | 6 | 8% |
| No requirements | 2 | 3% |
| Total respondents | 80 | |

## Pricing and Payment Terms

More than half of all buyers (56%) said they were willing to work with a local farmer to align on price and product mix while only 20% (14 buyers) said that local product pricing should match non-local pricing (see Figure 6). Twenty one percent reported that they'd be willing to just pay a premium for local product – the most flexible of the pricing options offered. Responses were favorable to local producers, who often perceive pricing to be a sticking point for new buyers and vice versa. Pricing and budgetary constraints were the top perceived challenges by this group of buyers, yet, most overwhelmingly reported they would be willing to problem solve with the producer or even accept the price premium given the market.

Buyers were also asked for their preferred payment methods (Table 9 and 10). Many offered their payment terms and invoice turnaround time summarized in Table 10. Upon further research, it was determined that the payment timeline was a key attribute that small suppliers prioritized as the difference between receiving a cash payment upon delivery versus a payment in 60 days which can have a large impact on the finances of a small business. Most buyers didn't specify their desired payment method, although at least 13 buyers reported preferring ACH (direct deposit) which requires the supplier to have a bank account and fill out additional paperwork. The most common payment terms were 30 days. Only 3 buyers reported paying cash on delivery.

**Figure 6.**
**Local Product Pricing**

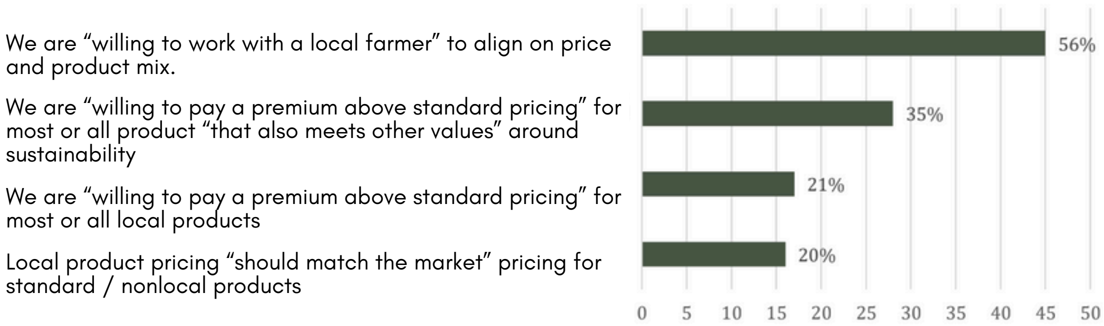



**Table 9.**

| Payment Type | Count | % |
|---|---|---|
| Did not specify | 49 | 61% |
| ACH | 13 | 16% |
| Credit | 11 | 14% |
| Cash | 6 | 8% |
| Check | 7 | 9% |
| Venmo | 1 | 1% |
| Total respondents | 80 | |
| Two or more payments types accepted: | 7 | 9% |

**Table 10.**

| Payment Timeline | Buyers Count |
|---|---|
| 14 days | 3 |
| 30 days | 15 |
| 60 days | 1 |
| Upon delivery | 3 |
| 21 days | 1 |
| 45 days | 2 |
| Total respondents | 25 |

# Conclusion

The process of conducting this research brought to light the immense opportunity that exists in upstate NY for local producers and farmers. Eighty buyers came forward and showed significant interest in purchasing from NYS producers. The process itself signaled that there is a need and desire for more buyer and supplier matchmaking in the region, as many buyers appear to be poised and ready to have a conversation about how to access and increase their local procurement efforts. The vast geographic representation of respondent input also speaks to this trend.

The findings of this report suggest that, overall, buyers have high interest in identifying new suppliers of locally grown or produced New York foods. The majority of buyers showed a willingness to work with local producers and be flexible to their business needs, on pricing and product mix, within reason. Buyers also indicated that local procurement will likely increase in the future based on the last two years of purchasing, another promising indicator for small NY businesses. Certifications and specifications are often perceived as barriers for small or beginning producers trying to break into new markets. However, this subset of buyers indicated that their priorities were primarily around identifying and purchasing local and NY grown product regardless of other attributes. Most buyers did not report certifications to be 'deal breakers' when working with a supplier, even when it came to GAP certification. Conversely, other supplier qualities rose to the top like communication skills, supply predictability and being able to consistently provide a clean, quality product.

While price differences between local items and market non-local items was a major perceived challenge by buyers, they also reported a strong willingness and understanding that local items can command a premium and/or reported flexibility when negotiating pricing with local suppliers.

**Findings indicate favorable future trends for local procurement in New York State and substantial opportunity for local growers to reach more markets.**

**CADE looks forward to assisting farm & food businesses with these new market opportunities.**

## CADE CAN HELP CONTACT US

### Farm & Food Businesses

- Looking to get "market ready"?
- Exploring new market channels?
- Need help obtaining certifications?
- Conducting market R&D?
- Preparing your wholesale price sheet?
- Getting an introduction to buyers who want your products?

www.cadefarms.org/consultation-request

hello@cadefarms.org

### NY Food Buyers

- Looking to connect with suppliers who have products you need?

hello@cadefarms.org

### Business Incubators, Accelerators & Economic Development Agencies

- Want to introduce your clients to new buyers?
- Refer them to CADE for our marketing and buyer matchmaking services!
- They can sign up for CADE's newsletters, workshops, visit the online Resource Library, request a 1:1 consultation at

www.cadefarms.org/consultation-request

**cadefarms.org**
**hello@cadefarms.org**

# Appendix

## Top products buyers are most interested in procuring from local sources:

| Product | Count | % |
|---|---|---|
| Vegetables | 60 | 75% |
| Meat | 49 | 61% |
| Added value dairy (cheese, yogurt) | 38 | 48% |
| Fruit | 42 | 53% |
| Value-added | 36 | 45% |
| Fluid Milk | 35 | 44% |
| Grains/Beans | 21 | 26% |
| Eggs | 25 | 31% |
| Honey/Syrup | 19 | 24% |
| Frozen or pre-cut produce (or IQF) | 12 | 15% |
| Seafood | 13 | 16% |
| Total Respondents | 80 | |

## Complete lists of top products mentioned by buyers:

### Vegetables

| Product | Count |
|---|---|
| Potatoes | 16 |
| Lettuce | 13 |
| Tomatoes | 12 |
| Carrots | 8 |
| Squash | 6 |
| Onions | 6 |
| Romaine | 5 |
| greens | 5 |
| Peppers | 5 |
| Corn | 4 |
| Cucumbers | 4 |
| Green beans | 2 |
| Cauliflower | 4 |
| Iceberg lettuce | 3 |

| Product | Count |
|---|---|
| Broccoli | 3 |
| Root veg | 2 |
| Cherry tomatoes | 2 |
| Sweet potatoes | 2 |
| Cabbage | 2 |
| Asparagus | 2 |
| Celery | 2 |
| Zucchini | 2 |
| Kale | 1 |
| Arugula | 1 |
| Eggplant | 1 |
| Salad mix | 1 |

### Fish

| Product | Count |
|---|---|
| Trout | 3 |

### Fruits

| Product | Count |
|---|---|
| Apples | 18 |
| Cherries | 3 |
| Peaches | 6 |
| Pears | 7 |
| Blueberries | 7 |
| Plums | 3 |
| Strawberries | 8 |
| Raspberries | 4 |
| Grapes | 4 |
| Melons | 3 |
| Rhubarb | 1 |

### Grains

| Product | Count |
|---|---|
| Beans/dry beans (general) | 5 |
| Chickpeas | 3 |
| Flour | 3 |
| Beans: Kidney | 2 |
| Beans: Navy | 2 |
| Oats | 2 |
| Rice | 2 |
| Beans: cranberry | 1 |
| Beans: Lima | 1 |
| Sesame | 1 |
| Beans: Black | 1 |
| Beans: Canelini | 1 |
| Corn meal | 1 |
| Tortillas | 1 |

### Meats

| Product | Count |
|---|---|
| Beef (all) | 21 |
| Chicken | 18 |
| Ground beef | 9 |
| Pork | 8 |
| Lamb | 6 |
| Sausage or Bacon | 4 |
| Turkey | 3 |
| Whole animal | 3 |
| Trout | 2 |
| Duck | 2 |
| Bison | 1 |
| Rabbit | 1 |

## Specific frozen, pre-cut products mentioned by buyers:

| Product | Count |
|---|---|
| frozen green peas | 4 |
| frozen green beans | 3 |
| frozen corn | 3 |
| Butternut | 1 |
| frozen diced carrot | 1 |
| Diced veg | 1 |
| frozen squash | 1 |
| frozen spinach | 1 |
| frozen broc | 1 |
| diced apples | 1 |

## Specific value added products mentioned by buyers:

| Product | Count |
|---|---|
| Bread / baked goods | 10 |
| sauces (includes BBQ, ketchup, mayo, mustard, etc) | 6 |
| Jam/Jelly | 5 |
| canned tomatoes / tomato sauce | 4 |
| Crackers / snacks | 4 |
| oils and vinegars | 3 |
| Pickles/kraut | 3 |
| Juice | 2 |
| smoothies/slushies | 2 |
| vinegar | 2 |
| cookies | 1 |
| date syrup | 1 |
| tahini | 1 |
| Granola | 1 |
| coffee | 1 |
| pizza dough | 1 |
| Pasta | 1 |
| Whole Wheat Pasta | 1 |
| Tortillas | 1 |
| Tinned fish | 1 |
| Apple sauce | 1 |

## High opportunity items: products buyers mentioned they could not source locally:

| High Opportunity Items | Count | Tag |
|---|---|---|
| Bakery items (bread, muffins, coffee cakes) | 3 | baked good |
| Pizza dough | 1 | baked good |
| Apple juice | 1 | canned good |
| Applesauce | 1 | canned good |
| Canned tomatoes | 1 | canned good |
| Date syrup | 1 | canned good |
| Jams | 1 | canned good |
| Sauerkraut | 1 | canned good |
| Tahini | 1 | canned good |
| Tomato sauce | 5 | canned good |
| Value added products (jams, jellies, mustards) | 2 | canned good |
| Vinegar | 1 | canned good |
| Vinegars | 1 | canned good |
| Whole wheat pasta | 1 | canned good |
| Butter | 3 | dairy |
| Cheddar cheese | 1 | dairy |
| Cheese | 1 | dairy |
| Cheese curds | 1 | dairy |
| Dairy products (any) | 6 | dairy |
| Heavy cream | 3 | dairy |
| Kefir | 1 | dairy |
| Milk in 1/2 pints | 1 | dairy |
| Mozzarella cheese | 1 | dairy |
| Ricotta | 1 | dairy |
| Frozen corn | 1 | frozen |
| Frozen fruit | 2 | frozen |
| Frozen prepared foods | 1 | frozen |
| Berries | 1 | fruit |
| Cherries | 1 | fruit |
| Fruit (any) | 9 | fruit |
| Grapes | 1 | fruit |
| Melons | 1 | fruit |
| Organic apples | 1 | fruit |
| Organic fruit | 1 | fruit |
| Peaches | 1 | fruit |
| Strawberries | 1 | fruit |
| Dry local beans | 2 | grain |
| Gluten-free oats | 1 | grain |
| grains | 2 | grains |

## High opportunity items continued:

| High Opportunity Items | Count | Tag |
|---|---|---|
| Oats | 1 | grains |
| Cilantro | 1 | herb |
| Ginger | 1 | herb |
| Lemongrass | 1 | herb |
| Thai basil | 1 | herb |
| Beef | 1 | meat |
| Breaded chicken products (patties, nuggets, fingers) | 1 | meat |
| Hamburger patties | 1 | meat |
| Hot dogs | 1 | meat |
| Meat | 4 | meat |
| Poultry (including chicken breasts) | 4 | meat |
| Pre-cooked crumbled ground beef | 1 | meat |
| Refrigerated proteins | 1 | meat |
| Seafood | 2 | meat |
| Tin fish | 1 | meat |
| Turkey | 1 | meat |
| Asian greens | 1 | vegetables |
| Asparagus | 1 | vegetables |
| Black garlic | 1 | vegetables |
| Bok choy | 1 | vegetables |
| Broccoli | 1 | vegetables |
| Brussel sprouts | 1 | vegetables |
| Carrots | 1 | vegetables |
| Cauliflower | 2 | vegetables |
| Hot peppers (chili, fresnos) | 3 | vegetables |
| Corn | 1 | vegetables |
| Garlic | 1 | vegetables |
| Green beans | 1 | vegetables |
| Greenhouse-grown produce | 1 | vegetables |
| Iceberg lettuce | 2 | vegetables |
| Lettuce | 4 | vegetables |
| Organic potatoes | 1 | vegetables |
| Red potatoes | 1 | vegetables |
| Rhubarb | 1 | vegetables |
| Root vegetables (potatoes, onions) | 2 | vegetables |
| Shallots | 1 | vegetables |
| Tat soi | 1 | vegetables |
| Vegetables (any) | 7 | vegetables |
| Zucchini | 1 | vegetables |