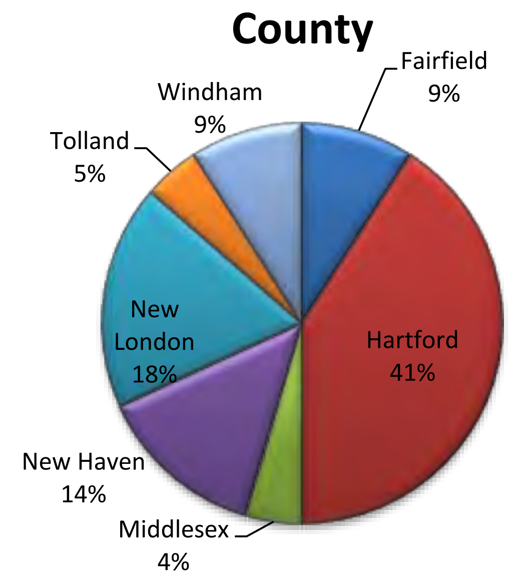
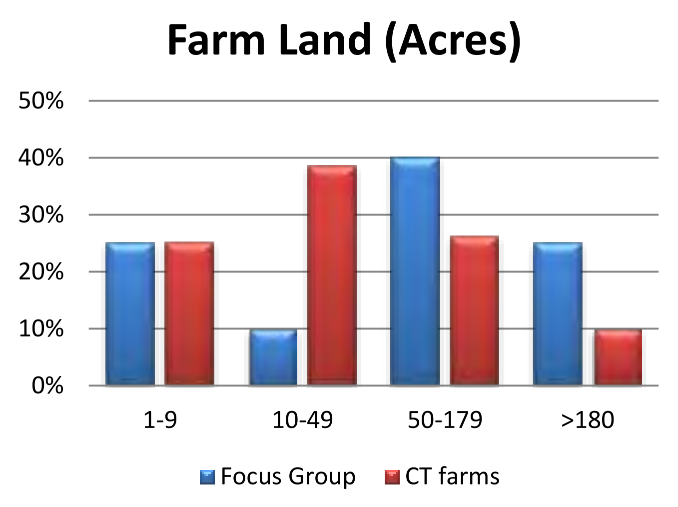
Farmer Focus Groups

1. Goal: to gather input from a wide range of Connecticut farmers about how the rebuilding of the Hartford Regional Market could benefit their farm operation and Connecticut agriculture
2. The consultant team contacted 112 farmers by telephone and email from lists provided by DOA, targeting farmers who currently sell at HRM, farm stand operators, meat producers, organic producers, and greenhouse growers
3. Red Tomato, a regional produce distributor, helped organize a farmer focus group with large fruit and vegetable growers
4. Farmers were offered 7 sessions, of which 5 had participants
5. 23 farmers participated in a focus group. They came from every county and represented a diverse range of sizes and products.
6. Compared to most Connecticut farms, the participants had larger farms although small farms were well represented.

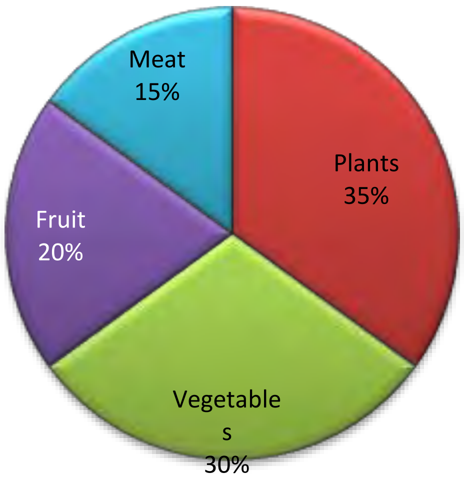




Participating Farmers

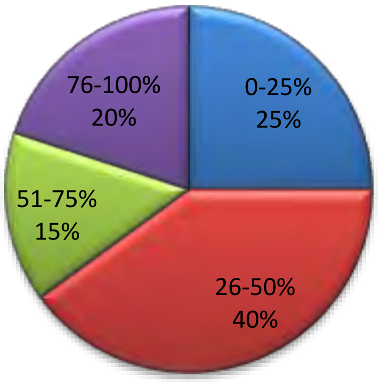
Name	Farm
Rachel Bespuda	Central CT Coop Farm Stand
Randy Blackmer	Blackmer Farm
Wayne Budney	Four Winds Farm
Alexis Gazy	Gazy Bros Farm
Joseph Geremia	Geremia Greenhouse
Renee Giroux	Gilberties Herbs
Lori Greagan	Roses for Autism
Daren Hall	George Hall Farm
Herb Holden	Broad Brook Beef & Pork
Amy Holmberg	Holmberg Orchards & Winery
Michael Kanderfer	Urban Oaks Organic Farm
John Lyman	The Lyman Farm, Inc.
Bruce McCue	McCue Gardens
Stacia Monahan	Stone Gardens Farm
Stormie Morrison	Karabin Farms
Tom Pinchbeck	Pinchbeck Rose Farm
Bill Remington	Remington Greenhouses
John Rogers	Rogers Orchards, Inc.
Joe Smith	Smith Acres LLC
Jody Sobaski	Sobaski Farm
Matthew Staebner	Blue Slope Farm
Austin Tanner	Creamery Brook Farm
Bill Walsh	WS Walsh

Principal Products



Off-Farm Retail Sales

as % of all sales



Farmer Focus Groups – Methodology

1. The focus group began with introductions, a description of the master plan project, and the redevelopment goals.

2. Discussion was structured around nine different opportunities for expanding or improving the Regional Market. A poster describing each opportunity was taped on the wall and described by the leader.

3. Farmers were asked to rate the opportunities by placing a colored dot on the posters. Each participant was given 3 green dots to identify the best ideas, 3 yellow dots to identify ideas that might be good, and 3 red dots to identify the least beneficial opportunities.

4. Each redevelopment opportunity was then discussed in detail.

Farmer Focus Groups – Concepts for Discussion

Hartford Regional Market

Opportunity 2:
Provide modernized and expanded facilities for small and medium-sized independent food distributors and producers

The Regional Market has historically provided space for small, independent food producers and distributors. They have served to diversify the range of products available at the Regional Market, including meat and dairy.

HEART OF THE HARVEST
A Cut Above the Rest
Fresh Cut Produce

We Proudly Serve
BOGNER
Meat Products
Since 1942
"When Quality Matters"

Hartford Regional Market

Opportunity 3:
Expanded Farmers' Market Shed

A new and expanded farmers' market shed can provide weather protection, lighting, electricity and water, and be used for both wholesale and retail sales. Roll down garage doors could extend the outdoor season.

Farmer Focus Groups – Concepts for Discussion

Opportunity 4:
Indoor "Winter Market"

Winter markets are essentially indoor farmers' markets, with limited infrastructure and no permanent storage. Stalls are rented by the season or day, allowing farmers and food producers to sell their products directly to consumers or wholesale buyers.

Opportunity 5:
Create Indoor Public Market

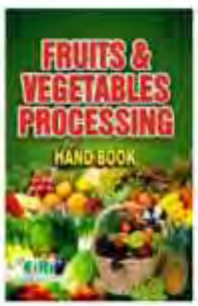
New indoor, year-round public markets typically have between 15 and 25 permanent vendors who feature a wide range of fresh and prepared foods, featuring local products. Stalls could be large enough to accommodate food production such as baking, cheese making, butchering and sausage making, ice cream production, etc. Vendors often sell both to consumers and wholesale buyers. Farmers could operate their own stand or sell to the vendors.

Farmer Focus Groups – Concepts for Discussion

Hartford Regional Market

Opportunity 6:
Shared Commercial Kitchen

A shared, licensed commercial kitchen could offer a place for farmers and small food producers to manufacture or package their own food products. The space would be rented by the hour or shift. The facility could provide assistance with recipe development, food safety, packaging, and marketing.



Hartford Regional Market

Opportunity 7:
Shared Cold Storage

A shared cold storage facility operated by the Regional Market or a private company could provide extra storage capacity for tenants as well as farmers on a per pallet basis. Shared cold storage at the Ontario Food Terminal in Toronto provides an income stream to the market and a valued service to tenants.

Farmer Focus Groups – Concepts for Discussion

Hartford Regional Market

Opportunity 8:
Enhanced Marketing of Connecticut Grown

With its central location and great highway visibility, the Regional Market could help promote agriculture by encouraging local residents and tourists to buy Connecticut Grown products, visit farm stands, and experience on-farm agri-tourism attractions. Wineries, breweries and farms could use the Regional Market as a place to promote their facilities and programs.

Connecticut
still revolutionary

CONNECTICUT
GROWN
THE LOCAL FLAVOR

Hartford Regional Market

Opportunity 9:
Education Facilities and Programs

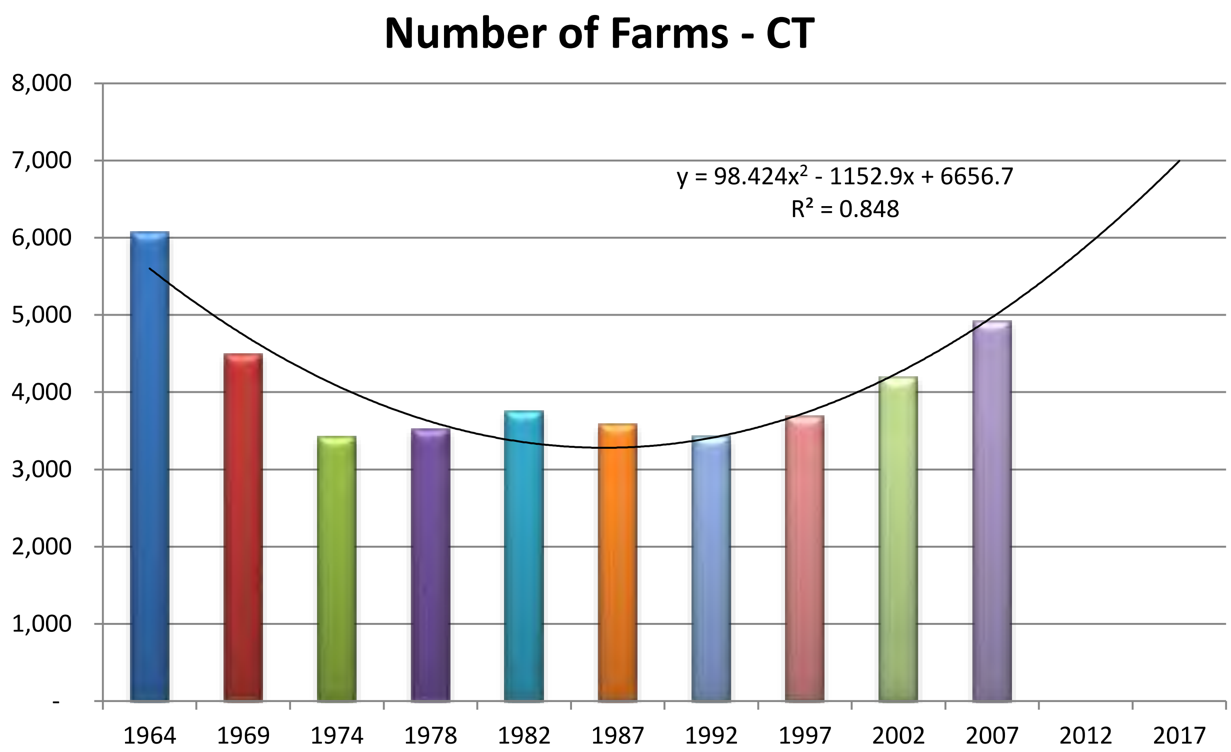
Educational facilities at the Regional Market (such as a demonstration kitchen, kids' kitchen, or greenhouse) could host programs for school groups and families, as well as professional education for farmers.

Farmer Focus Groups – Results

1. To tally the dot voting, each green dot was given 3 points, each yellow dot 1 point, and each red dot -3 points
2. The farmers' preferences are captured in the following chart:
3. The farmers felt the Regional Market could most benefit their farms through enhanced marketing efforts that encourage consumers to purchase locally grown foods
4. Increasing the capacity of small and medium size wholesalers was much preferable to increasing the number or size of large wholesalers
5. Farmers believe the Regional Market could host a larger farmers' market

Opportunity	Opportunity	Score
Concept 8	Enhanced marketing	34
Concept 2	Expanded small/med wholesalers	27
Concept 3	Expanded farmers' market	27
Concept 9	Education facilities	24
Concept 4	Winter Market	14
Concept 6	Shared kitchen	12
Concept 7	Shared cold storage	1
Concept 5	Indoor Public Market	-1
Concept 1	Expanded large wholesalers	-6

Agricultural Data Findings

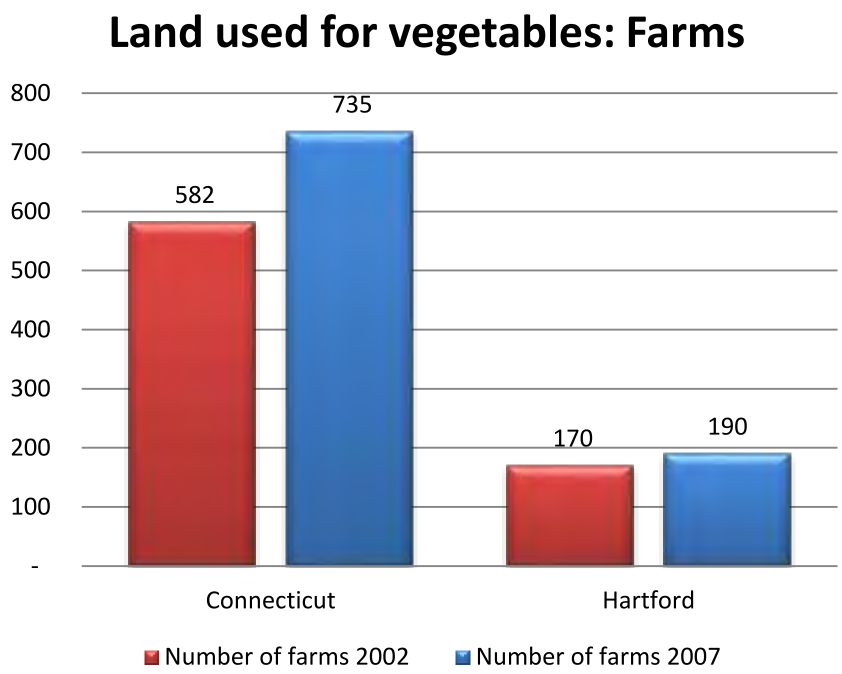


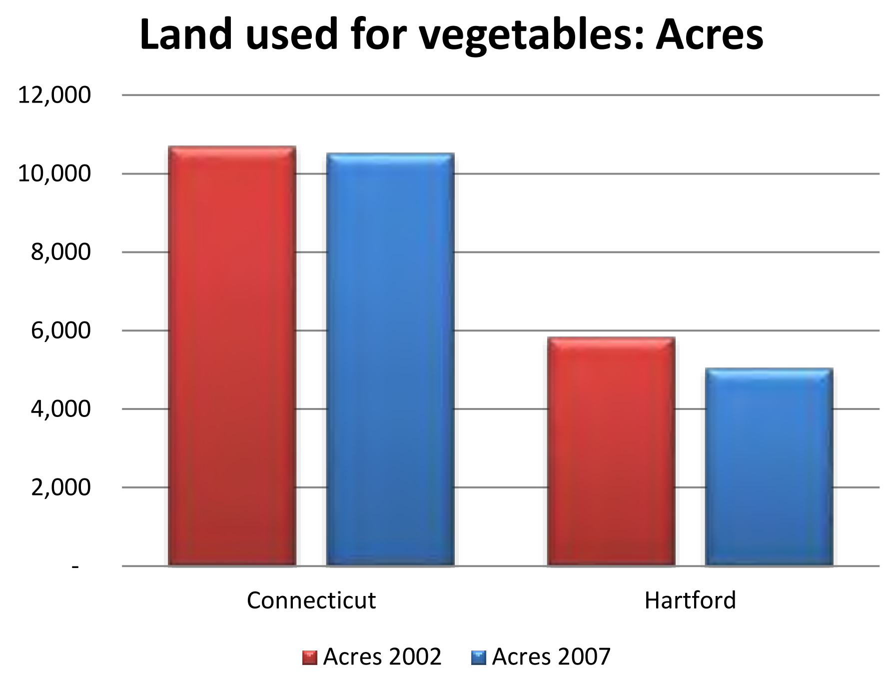
Year	Farms - CT
1964	6,068
1969	4,490
1974	3,421
1978	3,519
1982	3,754
1987	3,580
1992	3,427
1997	3,687
2002	4,191
2007	4,916
2012	5,884
2017	6,995
Δ 2007-2017	2,079
Δ% 1997-2007	33.3%
Δ% 2007-2017	42.3%
Δ% 2007-2012	19.7%

Key findings:

- After years of decline, the number of farms in Connecticut stabilized in the 1980s and began climbing in the 2000s. Based on current growth rates, the state will have more than 2,000 new farms by 2017, an increase of 42% over 2007.
- The 2012 Agriculture Census will soon be released and provide an important data point

Agricultural Data Findings

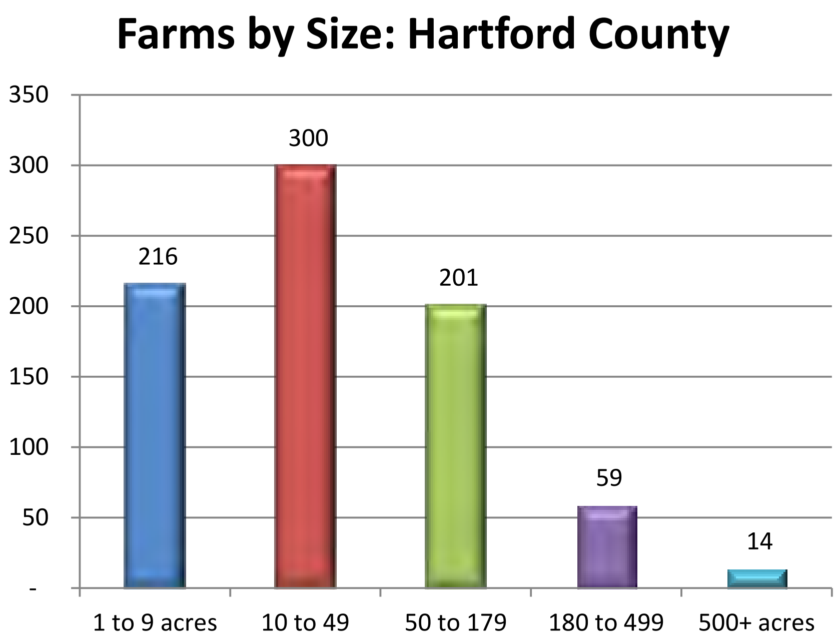


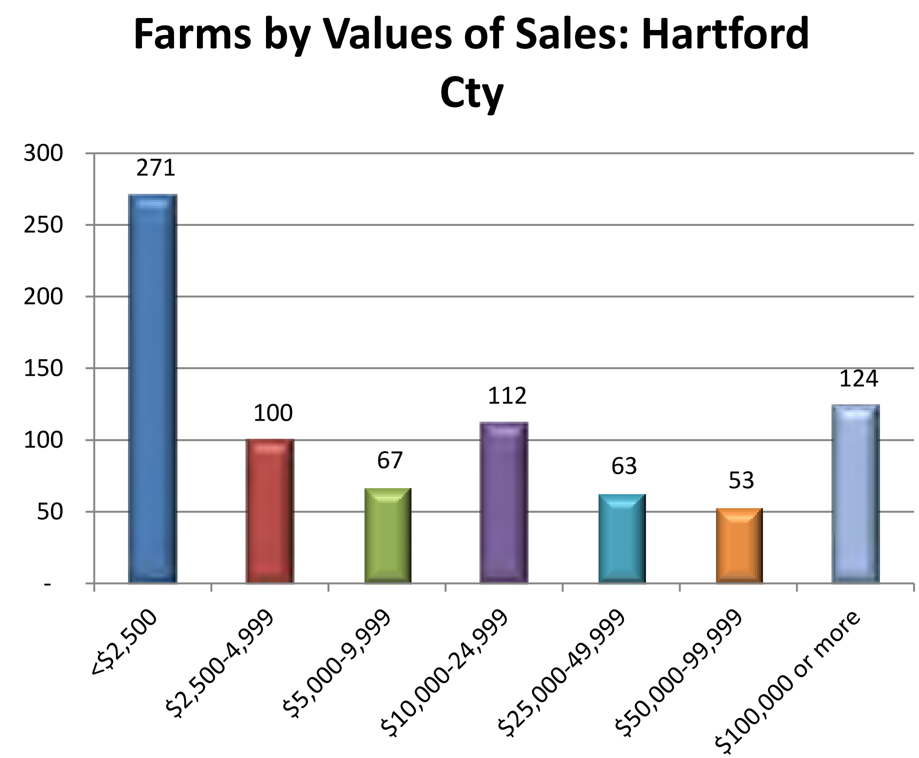


Key findings:

- The number of farms growing vegetables has increased significantly across Connecticut and in Hartford County. State-wide, 153 more farms were growing vegetables in 2007 than 2002.
- While the number of farms increased, the land used for vegetable production decreased slightly

Agricultural Data Findings



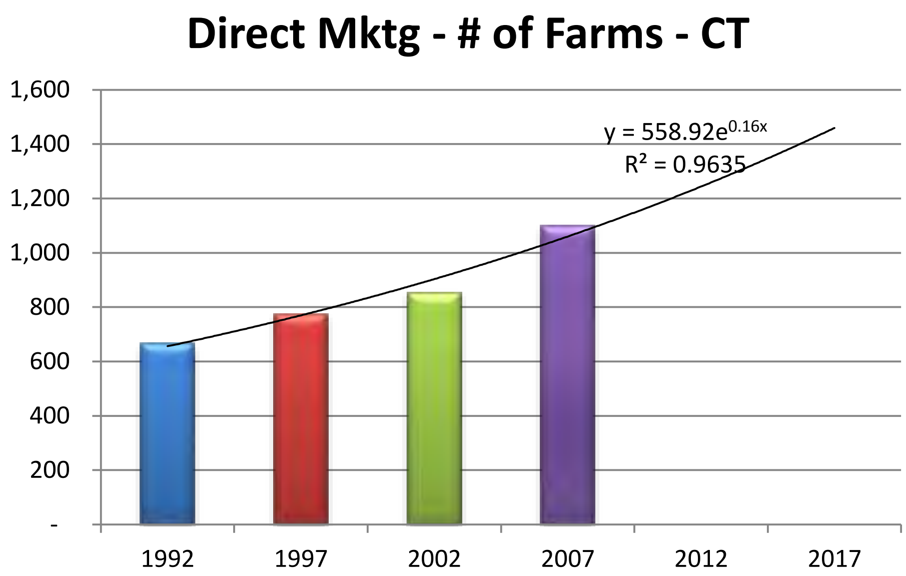


Market value of ag products sold ($1,000)	Connecticut	Hartford Cty
2007	$ 551,553	$ 133,582
2002	$ 470,637	$ 126,786
Change (2002-2007)	**17.2%**	**5.4%**
Average per farm 2007	$ 112,195	$ 169,091
Average per farm 2002	$ 112,297	$ 175,119
Change (2002-2007)	**-0.1%**	**-3.4%**

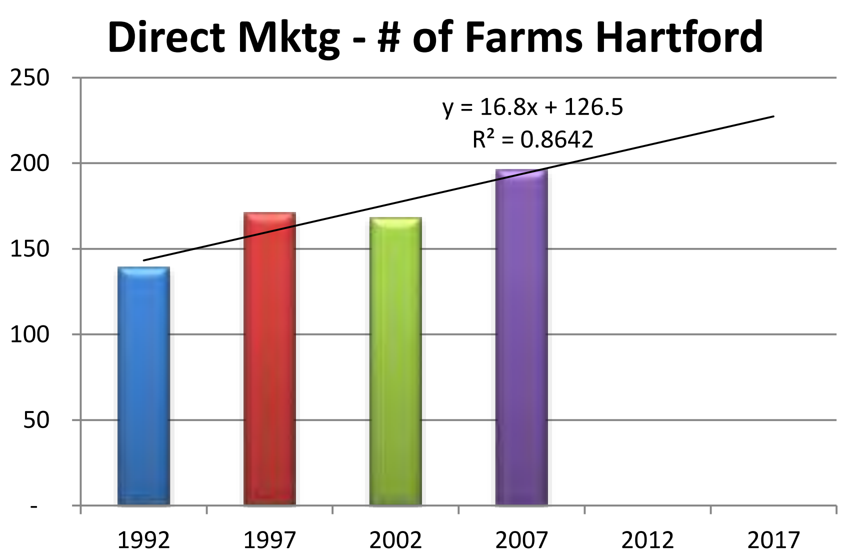
Key findings:

- Most farms in Hartford County are small and have low gross sales
- Some larger operations still take place
- Total market value increased significantly although per farm income stayed flat

Direct Marketing Farms



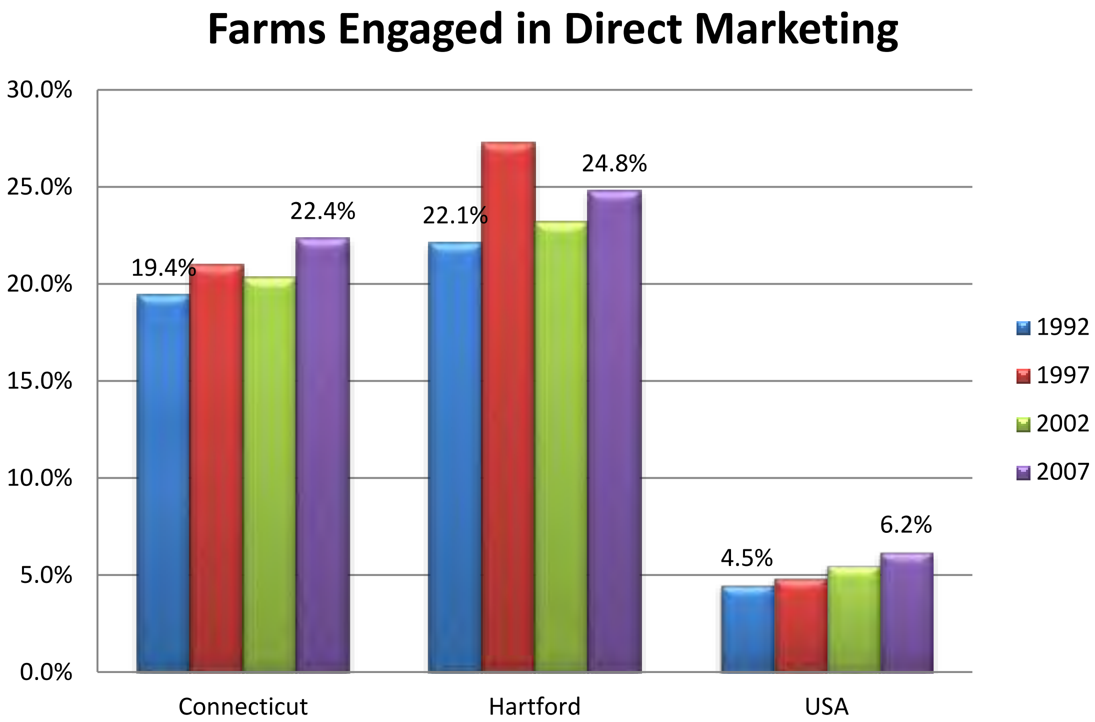
Direct marketing farms		
Year	CT	Hartford CT
1992	666	139
1997	774	171
2002	853	168
2007	1,099	196
2012	1,244	211
2017	1,460	227
Change 2007-2017	361	31
Change 2007-2017	33%	16%



Key findings:

- Farmers participating in direct marketing – the sale of products directly to consumers at farmers' markets, farm stands, U-pick operations, or CSAs (Community Supported Agriculture) – has increased steadily since USDA began collecting data in 1992
- By 2017, 361 more farms in CT will be engaged in direct marketing if current trends continue, an increase of 33% since 2007

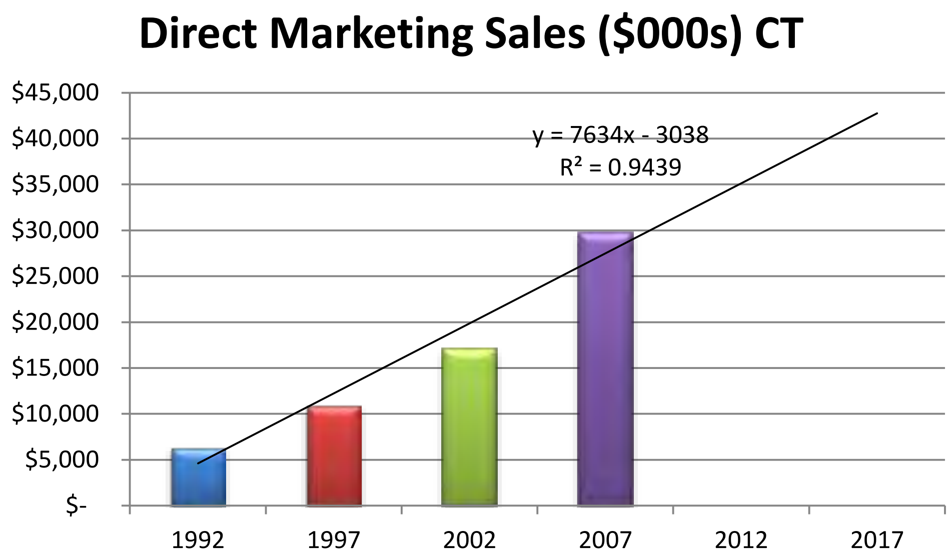
Farms Utilizing Direct Marketing



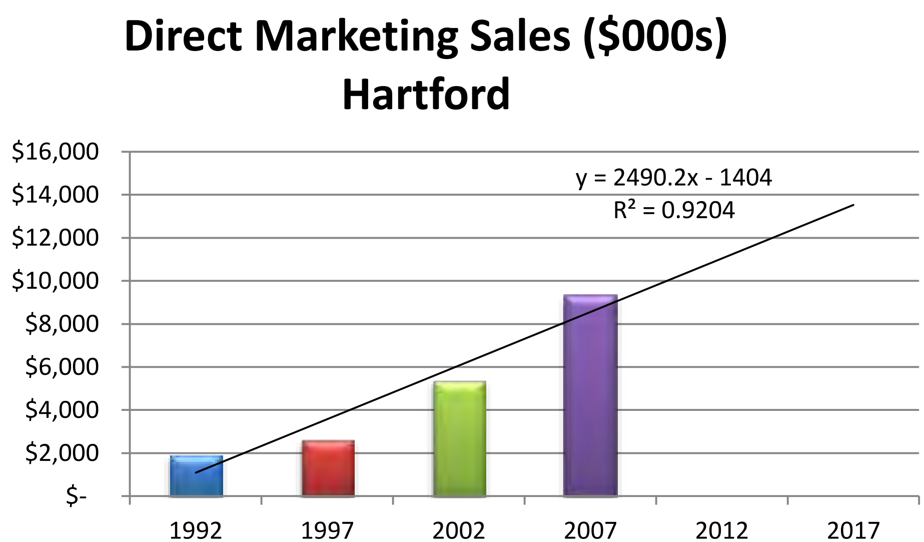
Key findings:

- CT far outstrips the nation in the percentage of farmers who participate in direct marketing
- Across the state, over 22% of farms do direct marketing while nearly 25% of farms in Hartford County do direct marketing

Direct Marketing Sales



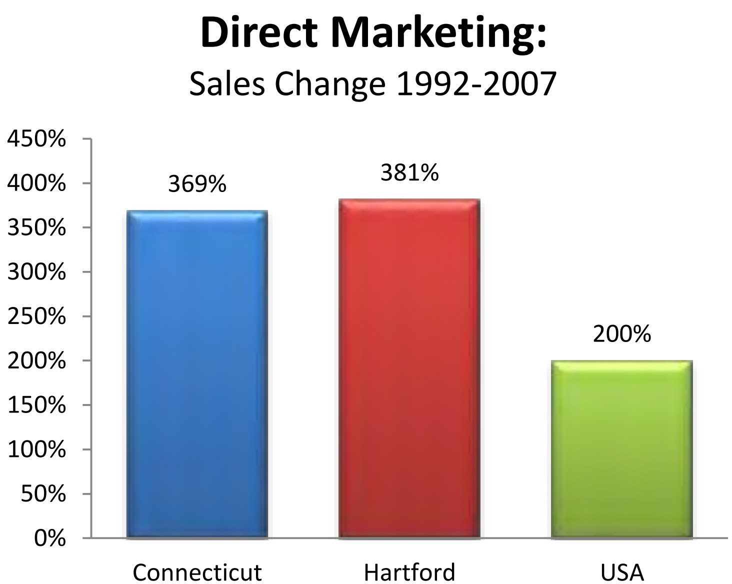
Direct marketing sales ($000s)		
Year	CT	Hartford Cty
1992	$ 6,348	$ 1,939
1997	$ 10,980	$ 2,647
2002	$ 17,108	$ 5,367
2007	$ 29,752	$ 9,333
2012	$ 35,132	$ 11,047
2017	$ 42,766	$ 13,537

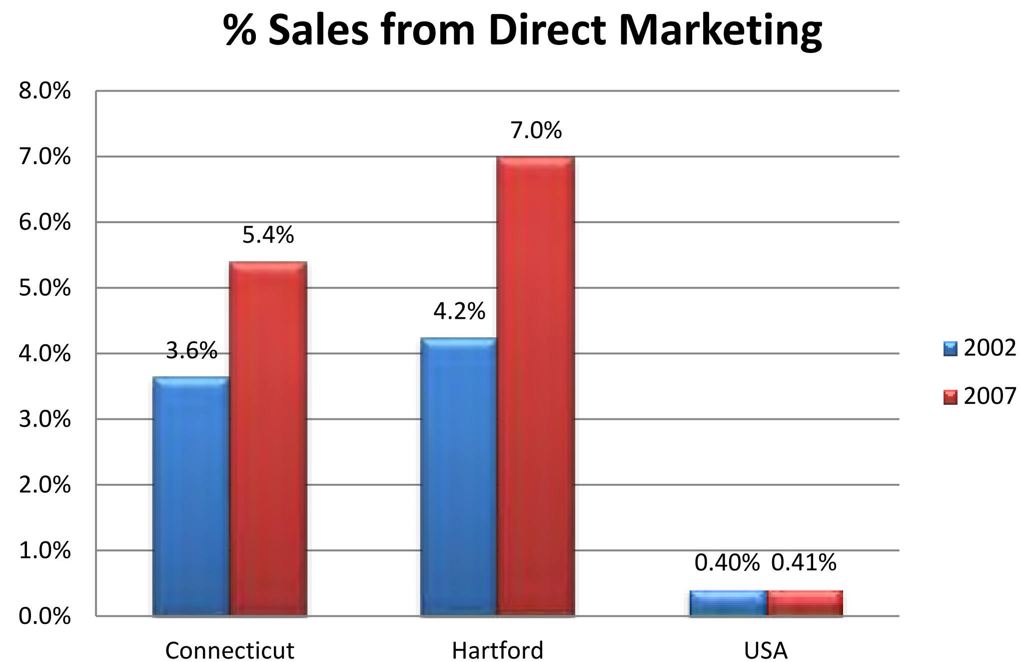


Key findings:

- Direct marketing sales are rapidly accelerating
- Assuming that growth will be linear, direct marketing sales in CT will shoot to nearly $43 million by 2017

Direct Marketing Sales



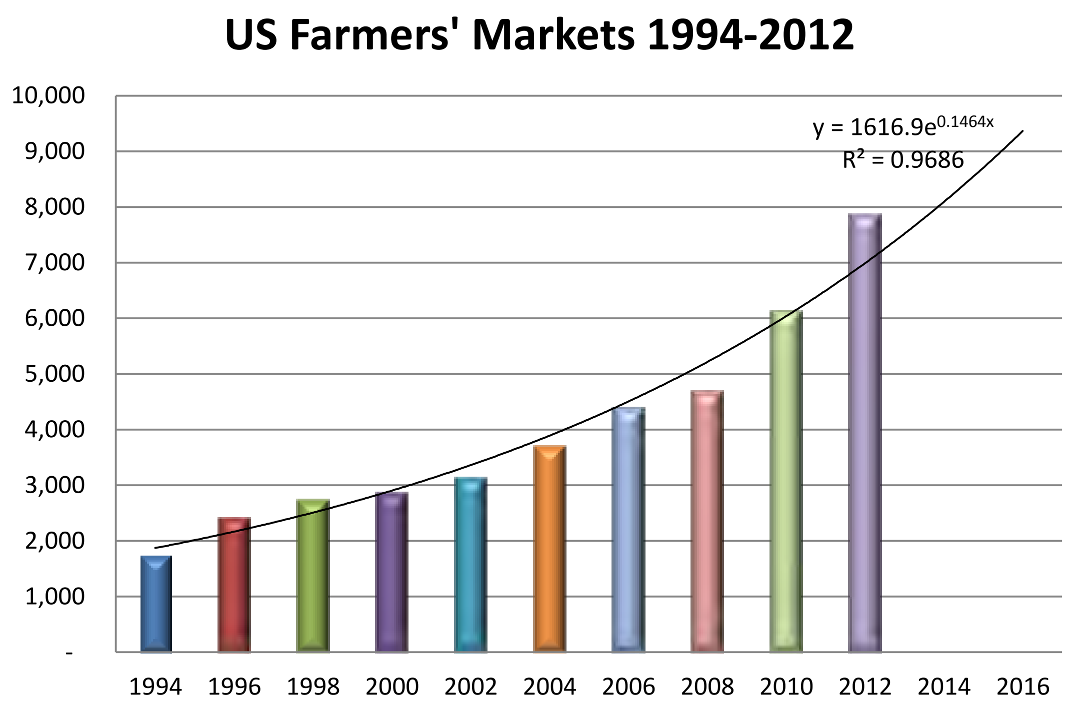


Key findings:

- Between 1992 and 2007, direct marketing sales nearly quadrupled in Hartford County and across Connecticut, twice the rate of the country
- Direct marketing is becoming a significant percentage of all sales, representing 7% of all sales for Hartford County farmers
- These upward trends will only continue if there are facilities to support direct marketing, including an expansion of the Hartford Regional Market

Agricultural Data Findings

US Farmers' Markets	
1994	1,755
1996	2,410
1998	2,746
2000	2,863
2002	3,137
2004	3,706
2006	4,385
2008	4,685
2010	6,132
2012	7,864
2014	8,004
2016	9,256



Key findings:

- Across the country, the number of farmers' markets has exploded, with nearly 8,000 in 2012. The number should surpass 9,000 by 2016 if trends continue.
- The growth of farmers' markets has been aided by the increase in winter markets, which now includes nearly 2,000 indoor winter farmers' markets nationwide