



Executive Summary: Roundtable on an Arizona North–South Local Foods Pipeline

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Problem Purpose Statement

The development of local food systems across Arizona has progressed unevenly, leaving gaps for rural communities and small farmers (Maricopa County Food System Coalition, 2020). This inconsistency is evident in the limited access or lack of access to markets and wholesale opportunities (Montanía & Duval, 2025) and cost-prohibitive infrastructure and processing equipment (Arizona Department of Agriculture, n.d.). Several unique factors in Arizona contribute to this reality including geography, urban center concentrations, climate, and a history of targeted capital investment (Arizona Food Systems Network, 2025). Local food systems actors have routinely identified these disparities but have lacked the coordinated and transparent effort to coalesce around solutions (Montanía & Duval, 2025), creating a significant barrier to progress.

Additionally, there have been recent consequential changes in the support available to local food systems actors including grant funding, technical assistance, loans and lending, advocacy training, and network and coalition building (Douglas, 2025; Brown, 2025). To address these barriers and opportunities, and to actively move toward solutions, The Eatery at Yavapai College, the University of Arizona Cooperative Extension, the Yavapai County Food Systems Network, and Activate Food Arizona (coordinating committee) partnered to convene a statewide roundtable on July 22, 2025. This gathering was convened to identify structural gaps and on-the-ground realities within Arizona's local food system and to contribute to the evidence base documenting these conditions, while establishing a foundation for coordinated solutions that support small farmers, strengthen institutional procurement, and improve community food access.

Background

To support informed discussion, the coordinating committee solicited background documentation from the University of Arizona's Department of Agricultural and

Resource Economics. Agricultural economists produced a white paper mapping the growing regions and the associated products in Arizona and identified key channels for local and regional food markets (Montanía & Duval, 2025). The white paper also highlighted infrastructure gaps and opportunities to coordinate seasonal production for expanded market access. Drawing on the 2022 Census of Agriculture data and complementary sources, the white paper synthesized available prior Arizona stakeholder discussions and relevant available literature to frame key questions for roundtable participants and to guide next steps.

Participants at the roundtable included:

- Three rural farmers
- Three aggregators/distributors or food hubs serving retail and institutional markets
- One institutional buyer/food service provider
- One stakeholder who is both a producer and farmer educator
- One retail-focused distributor providing systems support
- One food bank distributor
- Eight support organizations offering technical assistance, research, funding, market matchmaking, and other resources.

This mix enabled rich, cross-sector dialogue grounded in real-world practice.

Process

Historically, Arizona producers and local food systems actors have addressed the challenges of local food sourcing and infrastructure inequities in isolation, often revisiting the same issues repeatedly without a shared understanding or documentation (Maricopa County Food System Coalition,

2020). This approach has often caused stakeholders to continually start from the beginning, requiring significant time and capacity yet yielding limited forward progress. Having experienced this fragmentation, the coordinating committee worked to bring intentionality to the structure of the roundtable, as well as to the engagement process, discussions, and subsequent reports produced. This was achieved through a collaborative problem-solving approach, involving three key steps aimed at centering stakeholder involvement and solution creation.

As a first step, the coordinating committee determined the roundtable would be most effective if a real-world case study exemplifying the problem of inadequate access and the ability to source local food products in rural Arizona could be explored. The Eatery at Yavapai College sources fresh, seasonal ingredients from Arizona and within a 400-mile radius, with the intention of reducing food miles (the distance food travels from the farm to the consumer), supporting regional growers, and incorporating student-grown produce. Despite this commitment, sourcing locally has proven challenging. Anecdotal reports shared with the coordinating committee indicate that many food system actors have experienced widespread difficulties accessing state, regional, and local food sources, including The Eatery. Using The Eatery as a case study allowed roundtable participants to unite around a common example, generating discussions and possible solutions based on a real-world example rather than theoretical concepts. This approach helped ground the discussions by highlighting selected dynamics within the local food system and drawing attention to some of the needs of rural Arizona.

The roundtable also established a single, collaborative forum to capture and organize ideas from participants for long-term action in an efficient and equitable manner. This was achieved by utilizing Electronic Brainstorming. Electronic brainstorming (EBS) is a technology-supported method for generating group ideas. Participants contribute simultaneously through individual computers, allowing for anonymity, real-time sharing, and parallel input (Gallupe et al., 1992; Dennis et al., 1999). By reducing barriers such as waiting to speak or concerns about judgment, EBS addresses common limitations of traditional brainstorming. This approach can result in a higher volume of ideas and more efficient group processes. The EBS process also yields real-time data reports, which can then be aggregated and organized using various techniques, such as summarization, categorization, and identification of recurring themes.

During the roundtable, participants were engaged through facilitated conversations and EBS during the day, resulting in both quantitative and qualitative data collection. Using EBS technology, the group engaged in

submitting impeding factors and solutions to the question “What are all the things (factors) across a local food supply chain that cause an institution (e.g., a hospital, college, university) to refrain from buying locally produced food, where 'locally produced' means food that is produced in Arizona?”. Participants submitted their responses followed by group discussions and the ranking of the individual factors they identified through Nominal Group Technique (NGT) (McMillan et al., 2016). Ranking was conducted using an Impact/Feasibility Matrix, where participants submitted rankings based on the impact (high/low) of aspects they identified across the local food system and the feasibility (high/low) of these aspects considering the current local food system actors and supports.

The use of NGT provided a systematic framework for collective decision-making. Its structured process, encompassing silent idea generation, sequential sharing, clarification and discussion, anonymous ranking, and a final synthesis of results (McMillan et al., 2016), ensured equitable participation among all stakeholders and minimized potential dominance by individual voices. This approach reinforced a non-biased and transparent understanding of institutional barriers to local food purchasing as understood by participants of the roundtable. The EBS and NGT results can be found in Appendix A.* Selected qualitative data gathered during the two facilitated conversations at the roundtable are included in Appendix B.*

Key Findings

After numerous rounds of brainstorming, inputting, discussing, and ranking, the roundtable participants collectively produced several key findings:

Cold Chain Infrastructure & Coordination

Participants identified cold chain coordination and infrastructure as a major area of concern. This was known to and experienced by many participants prior to the roundtable, as evidenced in the Agricultural Economists’ white paper. Participants noted this umbrella issue included the need for physical cold-storage technology, such as expanded walk-ins, warehousing, and refrigerated transportation, as well as coordination efforts and intentional networking among continuous cold-chains and the dispersion of this infrastructure across Arizona (Montanía & Duval, 2025; Meyer, 2026).

Institutional Procurement Impediments & Opportunities

Roundtable participants indicated that procurement rules and institutional purchasing systems pose challenges as well as present opportunities for change. Current

* To encourage open data sharing, transparency, and replicability, full versions of both data sets are included in the appendices.

practices, like formal requests for proposals (RFPs), bid requirements (Reynolds & Hunter, 2018), and budget constraints (Izumi, 2010), were mentioned as excluding local producers. It was suggested that by revising these systems and enhancing buyer education, small and mid-sized local producers can be better supported and local food networks strengthened. Food safety requirements (Montanía & Duval, 2025; Canales, 2018) and existing relationships were also noted by participants as strongly influencing contracting decisions within the local food system making institutional sales often prohibitive for small and mid-sized local producers, creating the need for technical and funding assistance.

Lack of Broader Stakeholder Knowledge

Finally, roundtable participants ranked the need for more coordination and intentional effort to broaden stakeholder knowledge through storytelling and communication highest in feasibility for creating a viable solution. They suggested the absence of a shared communication channel (Montanía & Duval, 2025) and limited sharing of data and findings between organizations have contributed to unnecessary duplication of efforts and inefficiencies across the system. Education and support for disseminating best practices, model expansion, storytelling, and value sharing were cited as highly feasible. There was optimism expressed that these softer barriers could be addressed through targeted education and outreach. This underscores the importance of focusing on the relational dimensions of local food systems actors and the trust and transparency seemingly necessary to establish and maintain effective communication.

Other significant challenges noted by participants included delivery reliability, coordinated logistics, production planning, menu-planning rigidities, liability concerns, market transparency gaps, and procurement constraints. Lower-priority factors, such as data-tracking difficulties and centralized corporate food service contracts, were acknowledged but deemed less critical.

These findings should be interpreted considering several limitations. First, the results are exploratory, as they are based on a single facilitated roundtable session. While the session provided valuable insight into participant experiences and priorities, the findings represent a snapshot in time and may not capture the full range of perspectives across the broader Arizona local food system. Second, the insights reflect only the viewpoints of individuals who participated in the session and should not be interpreted as representative of all local food system actors in Arizona. Participation was voluntary, and therefore the findings may reflect the experiences and priorities of those most actively engaged or available to participate. Third, additional research, broader stakeholder engagement, and further analysis will be necessary to validate, refine,

and expand upon these findings. Future efforts should incorporate additional stakeholders to ensure a more comprehensive and representative understanding of the Arizona local food system.

Conclusions

Perspectives previously shared by small and rural producers with the coordinating committee were reinforced by roundtable participants, who emphasized that a persistent mid-supply-chain gap restricts producers' ability to scale production and limits community access to Arizona-grown foods. Participant insights suggest three priority areas for further exploration: (1) investment in cold-chain infrastructure and coordination, (2) institutional procurement reform to better include local producers, and (3) strengthening stakeholder education and relationships to support long-term collaboration. Together, these priorities represent potential pathways for advancing Arizona's local food system through both structural and relational approaches. Given the nuance of each key finding, the coordinating committee recognizes the inherent complexity of developing viable and effective solutions to these challenges. Further research, case studies, and regionally specific analysis are needed to inform strategies that are both practical and responsive to Arizona's unique food system context.

Complex procurement policies and rural dispersion are significant challenges and addressing these issues require long-term strategies, sustained advocacy, and systemic policy reform. To address these barriers and build on identified opportunities, stakeholders may consider the following areas as potential priorities for further exploration:

- **Investing in Infrastructure:** Expand delivery capacity, cold storage, and aggregation facilities through shared investments, public-private partnerships, and targeted funding.
- **Building Capacity & Education:** Develop statewide training and technical assistance for institutional buyers, focusing on sourcing processes, risk management, and success stories.
- **Regional Coordination:** Enhance collaboration between northern and southern Arizona to address geographical gaps, extend seasonality, and create a more reliable year-round supply.
- **Policy & Advocacy:** Pursue reforms in procurement policies, state-level incentives, and food safety frameworks to expand institutional flexibility.

Attention to these priorities may help strengthen and support the continued development of Arizona's local food system, with potential benefits for producers, institutions, and communities statewide. Progress in these areas will likely depend on the continued engagement, collaboration, and shared commitment of local food system actors. Stakeholders across the system play important roles in advancing these

efforts, and their collective contributions may help shape the future trajectory of Arizona's local food system.

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