



KANE COUNTY

KENYON, Kious, Koppie, Molina, Sanchez, Starrett, Wegman

AGRICULTURE COMMITTEE

THURSDAY, JANUARY 17, 2019

County Board Room

Agenda

10:00 AM

Kane County Government Center, 719 S. Batavia Ave., Bldg. A, Geneva, IL 60134

1. **Call to Order**
2. **Approval of Minutes:** December 20, 2018
3. **Public Comment**
4. **Partners**
 - A. Kane County Farm Bureau Updates (Steve Arnold, Manager)
 - B. Northern Illinois Food Bank Updates (Teresa Schryver, Communications Specialist)
5. **Presentations/Announcements**
 - A. Kane County Conceptual Land Use Strategies - Celebrating 25 Years (Mark VanKerkhoff, Director of Development & Community Services)
 - B. Tour of U-46 School District Food Distribution Center / Commissary Preview (Matt Tansley, Land Use Planner) (attached)
6. **New Business**
 - A. Horizon21c Agri-Food Summit Briefing (attached)
7. **Reports Placed On File**
8. **Executive Session (If Needed)**
9. **Adjournment**
10. **U-46 School District Food Distribution Center / Commissary Tour**

Field Trip Details

U-46 School District Food Distribution Center / Commissary

The U-46 School District Food & Nutrition Services will host the Kane County Agriculture Committee Members and public guests for a tour of their Food Distribution Center / Commissary in Elgin.

When: Thursday, January 17

(Immediately following Agriculture Committee Meeting)

Where: 1150 Bowes Road, Elgin, IL



Supporting a Local Food and Farm Ecosystem

HEALTH EQUITY PARTNERSHIPS



- ✓ Health screening & patient referrals to receive prescription produce boxes
- ✓ Nutrition education services

- ✓ The Food Hub buys farm produce and distributes CSA fruit/vegetable boxes through health partner referrals
- ✓ Build the hub's capacity to assist farmers in meeting

wholesale readiness requirements

- ✓ Program evaluation and business plan support services

FOOD HUB



INSTITUTIONAL READINESS

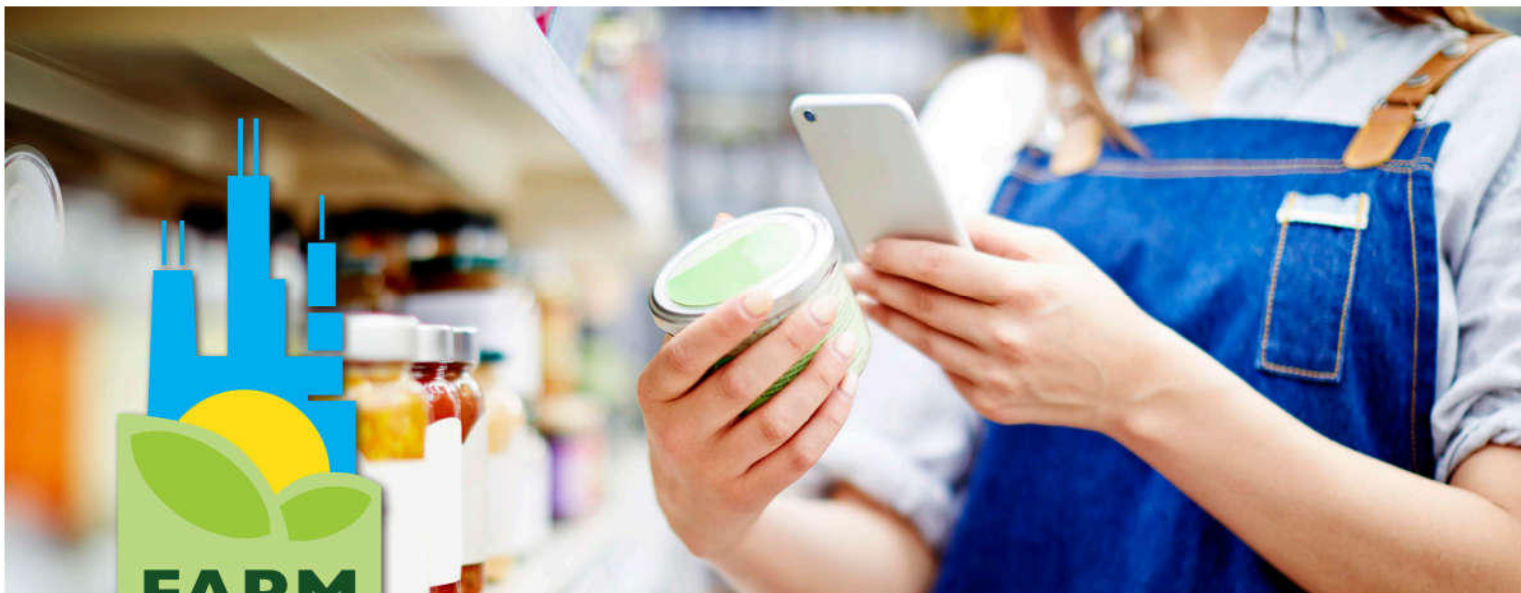


- ✓ Farmers and farm networks will sell product to the hub
- ✓ The hub will assist farmers with coordinating to meet wholesale readiness requirements

- ✓ Technical assistance for institutions (Juvenile Justice Center) to adapt food procurement practices
- ✓ Teacher training and food growing curriculum

FARMER READINESS





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HORIZON21C HOSTS

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HORIZON21c Agri-Food Summit: *The New & Future Consumer*

Nov 6-7, 2018
Chicago, IL

The time is now.

The agri-food system can't wait for the future to happen, but rather needs to thoughtfully consider what it should be, and how to work across sector and geographic divisions to collaboratively achieve it. In a time of unprecedented change, HORIZON21c engages diverse cross-sector leadership to build collaborative relationships, generate new ideas, and catalyze innovation in food and agriculture that look to the horizon.

On November 6-7, 2018, HORIZON21c brought together ~100 stakeholders to explore *The New and Future Consumer* and the profound impacts of evolving consumer trends on today's and tomorrow's agri-food system. The summit focused on the opportunities these developments present for the large and diverse agri-food sector throughout Illinois and beyond, and how the state's varied private and public sector entities can leverage collective resources to advance future opportunities. The following insights were gleaned during the 1.5-day event.

#HORIZON21c

Evolving consumer habits are driving fundamental shifts in the global agri-food marketplace to an unprecedented degree. Much less a passive agent, the customer has become a dynamic influencer. Profound changes in demographics, taste, values, and behaviors, and the emergence of hyper-connectivity, has empowered consumers to subvert traditional marketing and business models. Their demands for variety, convenience, safety, and nutrition, and a growing emphasis on equity and sustainability, are forging a values-based food system built around transparency, personalization, and—most importantly—trust.

Understanding and proactively responding to the many implications of this *New and Future Consumer* is critical to remaining competitive in today's agri-food system. As the traditional production-driven model shifts toward a more consumer-influenced one, all parts of the agri-food supply chain will find it imperative to innovate and evolve.

Consumer Influencers

The rise of the middle class and the digitally-centered Millennial and Gen Z generations are leading the new world consumer order of the 21st century.

Emergent global middle class: At just under 3.6 billion, the middle-class comprises half of the world's population for the first time in history. Studies have demonstrated that diets change as wealth rises and different and more nutritious food becomes accessible. The rise in protein consumption, from livestock to "alternative" sources that include plants, insects, algae, and lab-cultured meats, is a prevalent example.

Millennials and Gen Z: Millennials (1981-1997) and Generation Z (1998-2016) now comprise the largest share of the world's population. By 2027, Generation Z alone will represent 30%. Born into an age of technological connectivity, their habits and values will inflect the global food marketplace for the foreseeable future.

Consumer Influences

Hyper Connectivity: The average American spends more than 10 hours a day in front of a screen¹. A growing portion of the population has never experienced a world without digital technology and social media. Ubiquitous connectivity provides unprecedented ability to access, consume, and share information that, in turn, shapes

perceptions, attitudes, and values, and ultimately impacts food purchasing and consumption.

Information Source: With the number of media sources multiplying, what constitutes a reliable font of knowledge is evolving as well. Friends, family, and celebrities are assuming an increasingly influential role, one able to challenge the traditional function served by government, corporations, brands, and even scientific research. Inaccurate and/or unfounded data can spread as quickly as substantiated facts, and unwittingly be held, and acted upon, in the same regard.

Key Insights of Evolving Consumer Influence

Changing values, behaviors, health issues, and even environmental and social pressures, are reshaping almost every aspect of the *New and Future Consumer's* relationship with food.

- 1. The new food consumer is concerned about well-being and health:** The absence of illness, but also the presence of physical and mental health is important to today's consumer. This health trend echoes the shift in healthcare from a doctor-centric to patient-centric model where patients are actively seeking their own information with the aid of technology. Consumers desire nutritional, fresh, and more naturally or less processed foods with simple ingredients, while avoiding others that have known or perceived allergy and health implications. In the wake, new products are emerging. Alternative, particularly vegetable-based, proteins are seeing a surge in the marketplace. Nutraceutical foods that promote health-giving or disease-preventing benefits as well as "free-from" foods that boast what they exclude (e.g. additives, preservatives, GMO, gluten, high-fructose corn syrup, etc.) are also on the rise.
- 2. The new "healthy" consumer is a bit contradictory:** The adage "if it's going to be bad, it better be good" is directly representative of the health-conscious consumer's continued desire for indulgence. But while they may want to indulge in food that tastes good, they don't want to sacrifice health and nutrition. Taste and affordability are still primary drivers in food purchasing decisions, but "healthy and fresh" are significant contributors

¹ <https://www.cnn.com/2016/06/30/health/americans-screen-time-nielsen/index.html>

as well. This has been leading to the “premiumization of snack food”—higher end chocolates, premium popcorn, natural energy bars, etc.

- 3. Consumers are increasingly mobile and demand convenience:** The traditional 3-meals-a-day rhythm is morphing into 5-6 daily periods at which nutrition is consumed, perhaps in smaller portions, and in a variety of locations. Distribution channels for food are multiplying as the prominence of the brick-and-mortar grocery store is diminished in favor of everything from prepared foods, food trucks, and boxed meals, to grocery home delivery services and grab-and-go pickup and delivery services.
- 4. Personalized choice is upending conventional meal and dining experiences:** There is an increasing percentage of the world’s population on some form of exclusionary diet. Gluten-free, non-GMO, vegan, organic, local, and a host of other options are being demanded in the multitude of locations in which consumers are making purchases, including upscale to fast-casual restaurants, food box services, and grocery stores, among others. Whether driven by personal preference, growing awareness of issues of health and nutrition, or social and environmental concerns, diners are increasingly requesting menus and ingredients customized to meet their specifications.
- 5. Sustainability is a significant driver in food choice as consumers look to connect with the source:** Consumers are increasingly concerned about the environmental, social, and ethical implications of their food consumption choice. Terms like local, natural, organic, fair-trade, “free-from,” etc., adorn food packaging to reflect the principles and associated impacts of how the food was produced. In the digital information age, consumers desire to know more about and establish a relationship with their meal. “Local,” traditionally a reflection of distance ranging from 50 to 500 miles, more often now means simply knowing and connecting with the story: the how, where, and by whom. Emerging technologies, such as invisible, edible, tasteless DNA barcodes, are capitalizing on the consumer’s interest to access information about food that directly reflects their personal values.
- 6. More, better, and verified transparency across the supply chain is becoming essential:** Consumers are demanding transparency in terms of upholding their values (e.g. local, organic, cage-free) and dictating ingredients (vegan, vegetarian, gluten-free, etc.). Various data elements around where, by whom, and when food was produced are being demanded not only to insure safety, but also that values align with those the consumer is seeking. It is also creating challenges of accurately gathering, tracking, and managing quickly and exponentially increasing data complexity. Blockchain, data customization, DNA-level tracking, and the democratization of information, among other technologies and strategies, are likely to provide novel solutions to these new challenges.
- 7. Developing and maintaining trust from producers to consumers is requiring a new intensity of supply chain visibility:** Consumer trust in traditional institutions has been eroded. Perhaps because food maintains such an intimate, physical connection to consumers, it is emerging as *the* front line of this larger cultural phenomenon. Whether it’s fair labor issues, manufactured and potentially harmful ingredients, health and nutrition concerns, or seeking to reduce real or perceived environmental impacts, the food marketplace has become a complex epicenter requiring shifts all the way up the supply chain. Inundated with information sources, what constitutes a trusted source is also being challenged, if not redefined, with potentially profound implications.
- 8. Inundated with choice, consumers are connecting with curators:** Consumers are overwhelmed with product and label choice and are increasingly looking for tools to aid with their food decisions. Community curators are being sought out as one avenue to wade through the complexity of choice. Deemed as more trustworthy than traditional counterparts given their physical proximity and presence, these curators – from breweries, bakeries, and even butchers – are becoming less commoditized, more specialized, and more consumer-centric in response to the growing demand.

Next Steps for Illinois

The New and Future Consumer is challenging the status quo of how food is produced, processed, and consumed in the 21st century. Agri-food players up and down the supply chain need to consider how best to adapt in a new world food system that is hyperconnected, hyper aware, and hyper demanding if they wish to survive and thrive. FARM Illinois was established to explore these 21st century changes and help influence and advance the future course of Illinois' largest and most significant sector. As an agri-food epicenter ideally positioned to optimize natural, technological, business, and talent resources, there is opportunity for Illinois to lead an integrated, innovative, resilient food economy equipped to meet the needs of the future.

The following emerged as opportunistic next questions for continued dialogue:

1. Connecting with today's youth is critical to understanding tomorrow's consumer. How do Millennials and Gen Z'ers view the current food system, and what values influence their food purchasing choices?
2. Animal feed protein decisions in Asia may shape the future innovation required for Illinois commodities. Will corn and soy still compete as a commodity, transition toward niches/higher value products, or serve as a commodity for other industries (e.g. renewable plastics)?
3. New technologies can help consumers navigate the clutter in identifying products that match their nutritional and values-based goals/needs. How can Illinois' agri-food entrepreneurial ecosystem accelerate the pace of development and adoption of these technologies?
4. In a faster-changing world, with accelerated rate of technological development, what are the social and ethical implications of new technologies, and how will "new consumers'" perceptions of these affect innovation?
5. The shift toward consumer interest in health is global. The United States is in fact following, not setting, the trend. Who is leading the healthy-food wave globally, and what can we learn?
6. As agriculture shifts toward specialty markets and niches, the need to retain a competitive advantage and "trade secrets" may pose a challenge to supply chain transparency. What can be done to promote data integration without sacrificing intellectual property and ownership?
7. Experts are just beginning to understand the body, mind, menu connection. What new science is emerging that sheds light on the complex interaction of food on health?
8. Leveraging new knowledge to anticipate emerging trends is key to the notion of "creative intelligence." How can big data, IoT, and artificial intelligence lend new insight and create new pathways for ingenuity that meet changing consumer attitudes and perceptions?
9. Informational sources are growing, changing, and competing for consumer "face-time," often leading to a plethora of diverging and conflicting facts and figures regarding today's food system. How can the agri-food system collaborate to reduce areas of misunderstanding and misinformation and build trusted relationships with consumers?
10. As the agri-food system moves to a more consumer-driven model, the implications for the workforce are changing. What needs to be done to attract, train, and retain a workforce equipped with the skillsets to meet evolving consumer needs and demands?

* *The information provided in this report is a result of views expressed from a diverse gathering of agri-food supply chain stakeholders and do not necessarily reflect the views of any one participating group or individual.*

HORIZON21c: An Agri-Food Summit for the 21st Century

HORIZON21c is an annual summit for forward-looking leaders to engage in enriching dialogue on the trends and innovations shaping the agri-food supply chain. The summit subverts the traditional sit-and-listen conference format and creates an engaging and generative experience for all.

2018 Participating Stakeholders

Featured Presenters

Bethany Doerfler

Clinical Dietician

Northwestern Memorial Hospital

Dave Donnan

Senior Partner

A.T. Kearney

Stephen Hanauer

Clifford Joseph Barborka Professor of Medicine and Medical Director, Digestive Health Center

Northwestern University's Feinberg School of Medicine

Sanjeev Krishnan

Chief Investment Officer and Managing Director

S2G Ventures

Linda Mallers

CEO and President

FarmLogix LLC

Ron Meeusen

Managing Director

Cultivian Sandbox

Mark Rainey

Chief Brand Officer

Archer Daniels Midland Company

Participating Entities

A.T. Kearney

Advocates for Urban Agriculture

AgLaunch Initiative

Aker Technologies

Archer Daniels Midland Company

Basil's Harvest

Bon Appétit Management Company

Chicago Food Policy Action Council

Chicago Neighborhood Initiatives

Chicagoland Food & Beverage Network

City of Chicago

Clareo

CME Group

CoBank

Compeer Financial

Cultivian Sandbox

Delta Institute

FamilyFarmed

FarmLogix LLC

Federal Reserve Bank of Chicago

Foresight Design Initiative

Fresh Taste

Global Philanthropy Partnership

Gourmet Gorilla

Granular

Grow Forward

Grow Good Foods

Hatch Ag

Heuer & Associates

Illinois Agriculture Leadership Foundation

Illinois AgriNews

Illinois Farm Bureau

Illinois Soybean Association

Illinois Stewardship Alliance

Janie's Farm

Kane County

Kinship Foundation

Lewis & Clark Ventures

Liberty Prairie Foundation

Loyola University

Metropolitan Pier & Exposition Authority

Microsoft

MightyVine

MyAgData

Northwestern Memorial Hospital

Northwestern University's Feinberg School of Medicine

Open Prairie Rural Opportunities Fund

S2G Ventures

SAVOR Chicago

Sente

Seven Generations Ahead

Terra and Vine

The Chicago Community Trust

The Nature Conservancy

The Yield Lab

Tyson Ventures

University of Illinois at Chicago

University of Illinois at Urbana Champaign

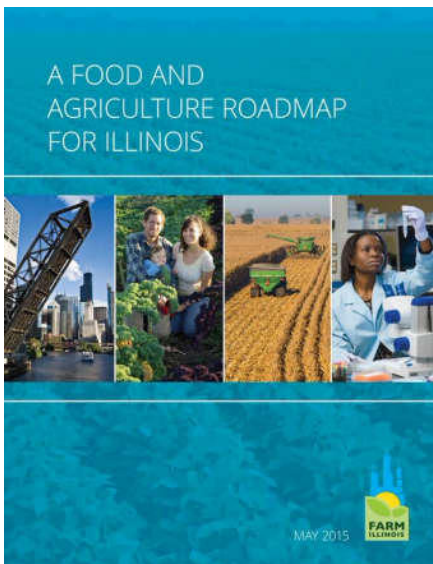
University of Illinois Research Park

UpField Group

Walter S. Mander Foundation

Washburne Culinary & Hospitality Institute

The RoadMap



The FARM Illinois RoadMap, released in May 2015, brought together over 150 leading stakeholders to develop a plan to support Illinois' future stake in food and agriculture. The plan outlined six key priority areas and 23 actionable recommendations.

FOR MORE INFORMATION

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Follow us on [Twitter @FARMillinois](#)

Mission Statement

The mission of FARM Illinois is to position Illinois as the global leader in food and agriculture system innovation by convening and connecting stakeholders to catalyze and champion actions that will grow the economy, support community health, and sustain the environment.

About

FARM Illinois is an independent, multi-stakeholder initiative working to harness the strengths of Illinois' food and agriculture sector. As a neutral third-party convener and connector, FARM Illinois is building a platform for non-partisan collaboration that convenes government, NGOs, and industry members. Through a collaborative network, FARM Illinois partners are joining forces to align strategic priorities, spark innovation, improve coordination, catalyze new collaborations, increase visibility, and build trust. In short, FARM Illinois is creating the enabling environment to ensure Illinois' food and agriculture sector continues to be a driver of the state's economy while also addressing environmental and societal challenges.

The FARM Illinois RoadMap's six goals:

Leadership for Innovation

Develop an integrated, statewide, long-term, public-private strategy for achieving the goals of the FARM Illinois strategic plan.

Business Development and Entrepreneurship

Spur business growth and investment by making Illinois the preferred destination for food and agriculture companies of all sizes.

Workforce and Education

Develop a high-quality workforce for food and agriculture and educate Illinois policy makers and the general public on sector innovation.

Resource Management

Ensure that Illinois is sustainably protecting and managing its natural resources.

Infrastructure

Ensure Illinois' infrastructure is capable of supporting the state's ability to sustainably meet its own needs while being a global leader in food and agriculture.

Branding and Market Development

Develop larger and more diverse local, regional, national, and international markets for Illinois' agriculture and food products by raising Illinois' profile.

FARM Illinois is a project of Global Philanthropy Partnership, a 501(c)3 fiscal sponsor.