



**Market Enhancement Programs
Operated in New York's Key
Competitor States and Provinces**

**Nelson L. Bills
and
Jane Maestro Scherer**

Department of Applied Economics and Management
College of Agriculture and Life Sciences
Cornell University
Ithaca, NY 14853-7801

It is the Policy of Cornell University actively to support equality of educational and employment opportunity. No person shall be denied admission to any educational program or activity or be denied employment on the basis of any legally prohibited discrimination involving, but not limited to, such factors as race, color, creed, religion, national or ethnic origin, sex, age or handicap. The University is committed to the maintenance of affirmative action programs which will assure the continuation of such equality of opportunity.

Table of Contents

	<u>Page</u>
Preface	ii
Introduction	1
Benchmarking AED Programs	1
Study Method	2
Results	3
List of Tables	
Table 1. AED Strategies and Tactics in New York's Competitor States and Provinces.....	5
List of Figures	
Figure 1. Eleven of New York's Competitor States.....	2
Figure 2. Schematic Depicting Focus of Benchmarking Study of AED Efforts in New York's Competitor States and Provinces	2
Figure 3. AED Programs Inventoried in New York's Competitor States and Provinces.....	3
Figure 4. State AED Efforts: "Key Program Features"	4
Figure 5. AED Programs with a Focus on Domestic Marketing, 11 States, Ontario and Quebec.....	8
Figure 6. AED Programs with a Focus on Export Marketing, 11 States, Ontario and Quebec..	8
Figure 7. AED Programs with a Focus on Business Enhancement, 11 States, Ontario and Quebec.....	9
Figure 8. AED Programs with a Focus on Advertising, Promotion, Education, and Information, 11 States, Ontario and Quebec	9
Figure 9. AED Programs with a Focus on Financial Assistance, 11 States, Ontario and Quebec.....	10
Figure 10. AED Programs with a Focus on Information or Regulation, 11 States, Ontario And Quebec.....	10
Appendices	
Appendix A. AED Programs in 11 Competitor States and 2 Canadian Provinces	11
Appendix B. AED Programs in California	17
Appendix C. AED Programs in Florida.....	31
Appendix D. AED Programs in Maryland	51
Appendix E. AED Programs in Michigan	67
Appendix F. AED Programs in Minnesota.....	88
Appendix G. AED Programs in New Jersey	114
Appendix H. AED Programs in North Carolina.....	151
Appendix I. AED Programs in Ontario	168
Appendix J. AED Programs in Pennsylvania.....	215
Appendix K. AED Programs in Quebec.....	241
Appendix L. AED Programs in Vermont	263
Appendix M. AED Programs in Washington.....	286
Appendix N. AED Programs in Wisconsin.....	292

Market Enhancement Programs Operated in New York's Key Competitor States and Provinces

Nelson Bills and Jane Maestro Scherer*

Preface

Structural change in New York agriculture continues to raise new questions about the industry and its future prospects for economic growth and development. What steps can educators, community leaders, and public agencies take to promote improvements in the economic and social climate for communities that are dependent upon farm and food production? The New York State Department of Agriculture and Markets and Cornell's College of Agriculture and Life Sciences play an important leadership role in the agriculture-based economic arena. This report is one of two documents that deals with the collaborative work that will be needed to advance the discussion of development challenges and opportunities for the State and identifies program milestones for the Commissioner. A second report, entitled *Agriculture-Based Economic Development: Trends and Prospects for New York*, documents the direction and scope of well over 100 ag-based economic development programs now operating in competitor states and Canadian provinces.

This research effort was conducted with financial support provided by the New York State Department of Agriculture and Markets. The Commissioner and his staff were directly involved in the study design and provided periodic advice on its conduct. In addition, the study was supervised by an advisory committee assembled by the Commissioner. The advisory committee membership included: Pat Hooker, NYS Farm Bureau; Tom Shepard, Dairylea Cooperative, Inc.; Joe Walsh, Cornell Cooperative Extension, Sullivan County, New York; Tim Pezzolesi, Cornell Cooperative Extension, Ontario County, New York; Martin Culik, Cornell Cooperative Extension, Genesee County, New York; R. David Smith, Cornell University; John Mitchell, IL Richer Feeds, Inc.; Ora Rothfuss, Ag Development Specialist, Wayne County Planning, Wayne County, New York. In addition, Michael Chamberlain, formerly with NYS AgriDevelopment Corp., made important contributions to the design and conduct of the study.

* Nelson Bills is a professor in the Department of Applied Economics and Management at Cornell University. Jane Maestro Scherer operates M-S Consulting, Inc., in Brooktondale, New York.

Market Enhancement Programs Operated in New York's Key Competitor States and Provinces

Introduction

An intensifying concern at the state and local levels is the economic vibrancy of farm and food production. Traditionally, the economic circumstances facing operators of farm businesses have been considered the province of the US Congress. The USDA operates numerous programs designed to meet a variety of policy objectives for farmers and for rural communities.

In addition, and sometimes in close concert with Federal agencies, state governments have devised new or accelerated long-standing efforts to promote ag-based economic development (AED). The policy objective is to create the public infrastructure, and sometimes the economic support, needed to boost performance in food and agriculture industries and their contribution to mainstream economic development efforts.

State governments want to be players in the ag-based economic development process. A key element is assistance in conditioning the environment needed by the industry to thrive in local, national and global markets. However, beyond anecdotal reports, there is no ready information base on the direction and scope of state-level economic development programs operated under the auspices of a State Department of Agriculture. Better baseline information on state-level efforts to enhance income and employment opportunities in food and agriculture is needed for several reasons. In the first instance, such information may help identify unexploited opportunities to boost performance in agriculture and food sectors and help clarify the benefits that might come to local economies from more emphasis on state support for more sales into local, regional, national and international markets. A second, and more challenging possibility, in the context of New York farm and food production, is that landmark or pathway programs can be identified in key competitor states that might be adapted to (or accelerated for) the New York State situation in ways that will advantage growers, processors and other elements of the farm and food community in local or external markets.

State effort geared to promoting in-state farm and food production is not new but seems to take on a new sense of urgency for State policy-makers in the present economic environment. This report focuses on the results of a study to screen and characterize state-level programs geared toward farm and food market expansion and enhancement in New York's competitor states (and in two Canadian provinces). The results help set the stage for a benchmarking process, where determinations can be made by the Commissioner and his staff on whether in-house public services can be improved/enhanced by adopting successful practices used elsewhere. At the same time, we believe the results also help inform conversations about such initiatives at the local, sub-state level.

Benchmarking AED Programs

Benchmarking is a widely received analytical technique in the engineering and management literature. Benchmarking is an element of strategic planning, where an organization develops plans and strategies based on a working knowledge of the best practices offered by competitive organizations. The benchmarking paradigm is a private sector paradigm, adapted to studying and perhaps emulating behaviors in profit seeking business firms. Use of benchmarking in a public agency requires recognition of circumstances in the public sector. These can include alternate, and perhaps conflicting, organizational mandates and objectives. Shortfalls in budget resources needed to evaluate and successfully emulate benchmarked programs can be another vexing issue for administrators in a public agency who have a mandate to provide services to growers and agri-business firms.

For these reasons, this study dealt with the initial step of identifying practices and their level of support (as reflected in staff/budget), rather than explaining all the reasons the practice is in place and,

perhaps, successful in a competitor state. Similarly, the inventory of AED programs only assists in staging the initial, but crucial, first benchmarking step: enumerating program efforts in other states. This helps identify the conditions required to successfully migrate a program or set of practices to New York State. The latter task would fall on the Commissioner and his staff, who are versed in the administrative and political realities of AED program development.

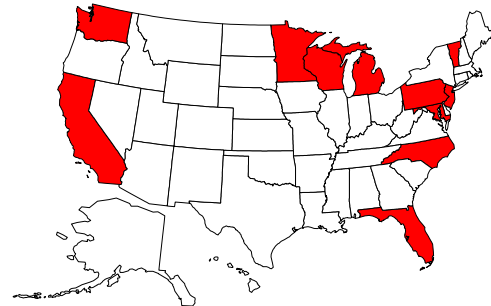
Study Method

The study approach was interactive, with regular input and evaluation from NYS-DAM staff and a project advisory committee. The initial phase entailed an Internet screening of State Departments of Agriculture in all 50 states, following an initial program taxonomy that included export marketing, promotion of high value or value-added products, direct marketing, state/regional labeling, and promotion of farm and food-related services, including agri-tourism.

Then, for a second and more detailed project phase, we identified a collection of states and Canadian provinces that compete in key New York farm and food markets. For this sub-set of states we cataloged practices used in each aforementioned program area and attempted to document the direction and scope of the practices. The cataloging and documentation, in turn, required direct contacts with staff in state departments of agriculture in other states/provinces.

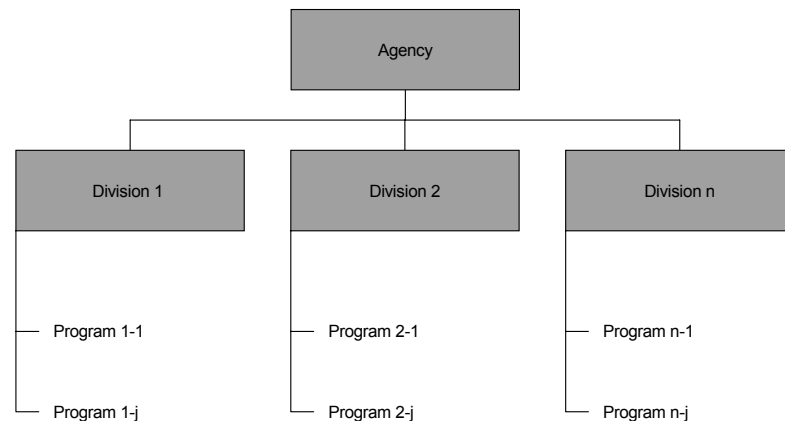
The resulting list of states, as shown in Figure 1, along with the Canadian provinces of Ontario and Quebec is stylized and based on informed judgment. Cases could be made for excluding some of the states or including some others. The states and provinces selected, on the other hand, can be defended in terms of patterns of farm output and keeps the study in bounds in terms of time and effort required to gather state data.

Figure 1. Eleven of New York's Competitor States



For this sub-set of states and provinces, we cataloged agricultural economic development programs and documented the direction and scope of the practices. At first glance, such cataloging seems routine, but many questions emerge on program definition and their identity within each state or provincial agency. A schematic showing the process we used is shown in Figure 2. It was decided that we would let contacts in each state or provincial agency self-select agency efforts into AED programs. Programs, in turn, are defined as the under story of organized efforts to promote ag-based economic development that falls within the agency organization -- typically in two or more divisions.

Figure 2. Schematic Depicting Focus of Benchmarking Study of AED Efforts in New York's Competitor States and Provinces



The program inventory was initiated by written correspondence to state commissioners or provincial ministers to explain the purpose of our study and our intention to identify staff members who could assist with the project. Then telephone and e-mail links were set up with staff members who agreed to provide information on program efforts within their agency and help us check our program summaries for accuracy.

Lines of demarcation between programs were not always clear and a sometimes tedious interactive process was needed to achieve a sharp focus on individual program efforts. To expedite this process, we first screened Internet web sites for each agency and province. Then, information on a first-cut list of AED programs was assembled based on the Internet review. This information was used as a worksheet for review by contacts in each state and modified to achieve more concordance with agency efforts to promote economic development in the food and agriculture arenas.

Finally, agency contacts were asked to “size” each program, in terms of staffing commitment on an annual, full-time equivalent (FTE) basis and/or budget outlay. Success with the sizing element of this study, unfortunately, was only partially achieved. Data gaps prohibit a full reporting of program depth and scope in dollar or staffing terms. Individual programs were too often embedded in

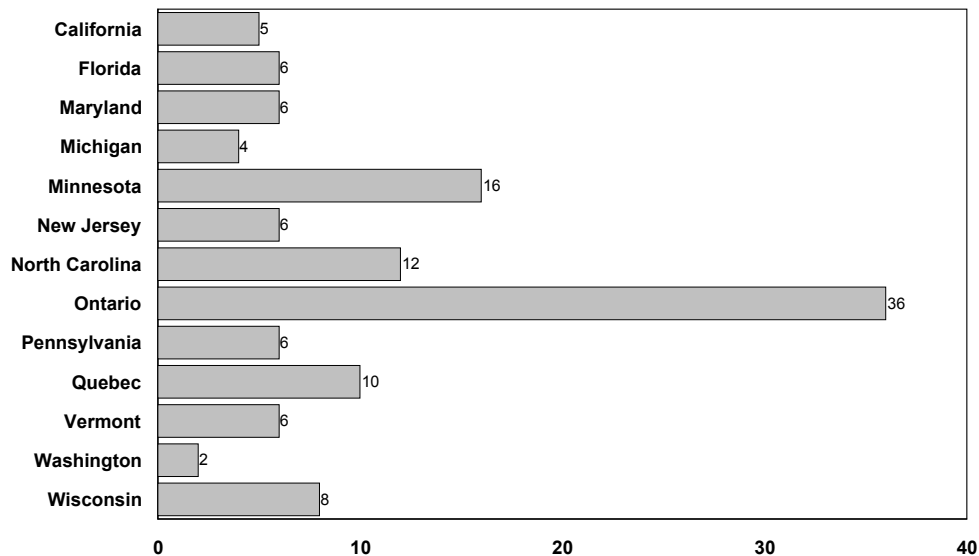
the budgets of larger departmental administrative units. In these cases, a full accounting of time and effort to individual programs fell beyond the scope of this study. Another source of diminished budgetary clarity was obtaining a quick assessment of the resources committed by collaborators, either in public agencies, non-governmental organizations (NGO), or private industry.

Results

A total of 123 programs were identified in the 11 states included in this study and the provinces of Ontario and Quebec — see Figure 3. Each program is described in Appendix A and detailed, state-by-state, program descriptions and summaries are provided in Appendices B-N. The program list arguably could have been shorter or longer depending on the program definitions built into the inventory. As mentioned above, the results we obtained were reviewed to the extent practicable with agency contacts and reflect their collective judgments about the way their efforts relate to our study.

Finally, we reviewed each of the 123 programs and devised a classification system to highlight what we thought were the salient features of each program. Any single program, of course, can have multiple salient features because of the complexity of the program and/or the presence of multiple program

Figure 3. AED Programs Inventoried in New York's Competitor States and Provinces



objectives. Again, the identification of features was judgmental. It was decided that we would err on the side of over-description, and consequently a rather lengthy list of “key program features” was incorporated into this study phase.

The overarching program features considered are shown in Figure 4. This overarching list can be thought of as a list of ag-based economic development strategies. First considered is the broad category of marketing. We decided to texture our description of program features by drawing a line of demarcation between efforts to enhance sales into domestic markets with efforts to enhance sales into export or offshore markets. Another broad category dwells upon the notion of business enhancement, where programmatic emphasis is placed on assisting growers and producers and their efforts to grow and possibly diversify their businesses. Still another strategic issue relates to advertising and promotion -- steps that state agencies might take to affect the demand for in-state farm and food production. To the extent practicable, we tried to distinguish between advertising and promotional strategies and companion efforts to devise and deliver educational and informational products to in-state audiences. Another strategic consideration revolves around efforts to afford direct financial assistance to growers and producers. We also distinguish between efforts to conduct research and maintain databases, some regulatory functions, and categories of effort that fall into an “other” category.

For each of these overarching strategies, our classification system then delves into tactics in use to affect each AED strategy. Our list of tactics and their presence in 123 programs identified for individual states and provinces is shown in Table 1 and in Figures 5-10. For the most part, the tactics used are self-descriptive. On the domestic marketing side, the highest number of programs deals with efforts to encourage local purchases of food and

fiber and efforts to increase the visibility of in-state production with in-state consumers (Figure 5). There is also a significant presence with direct marketing programs and efforts to create and develop new markets. On the export marketing side (Figure 6), the predominant tactics involve participation in trade shows and the organization of trade missions and reverse buyer’s missions. For the latter, offshore buyers are encouraged to make on-site visits as a prelude to negotiations over sales offshore. Some states and provinces are heavily vested in export efforts as evidenced by the maintenance of trade offices abroad.

The business enhancement category (Figure 7) involves a nested set of tactics ranging from value-added processing to assistance with web site development. Relatively more prominent are programs that focus on value-added processing, assistance with business planning, infrastructure development and promotion of partnerships and producer/grower information networks. Although clearly related to business enhancement, we separated the area of advertising and promotion. Nearly 40 advertising programs were identified along with 21 product-labeling efforts.

Not surprisingly, many states and provinces are assembling and disseminating information on development issues. Numerous educational programs were also identified. As shown in Figure 8, we identified 46 programs that feature this informational and educational component. Most of these inventoried programs stress face-to-face contact with clients and audiences as reflected in workshops, seminars, demonstrations, and training. Another prominent tactic falls in the domain of financial assistance, and involves financial counseling and the provision of consulting services to growers and producers concerned about financial matters (see Figure 9). Some states are experimenting with direct financial support to growers and producers. We identified a suite of programs oriented toward providing financial incentives for expanded farm or food production. Some states have a presence in the research and database management arena, while others identify programs that have a fairly clear regulatory function built in (.). Finally, we encountered some programs with features that seem to be salient but defy quick classification. These “other” tactics include efforts to develop cooperatives, councils, marketing clubs, and other boards and organizations.

Figure 4. State AED Efforts: "Key Program Features"

- Domestic marketing
- Export marketing
- Business enhancement
- Advertising and promotion
- Education/information
- Financial assistance
- Research/data base
- Regulatory
- Other

Table 1. AED Strategies and Tactics in New York's Competitor States and Provinces

	CA	FL	MD	MI	MN	NJ	NC	Ontario	PA	Quebec	VT	WA	WI
DOMESTIC MARKETING													
New Markets Creation and Development		X	X		X	X	X	X	X	X			X
Buy Local/Promotion of In-state Production	X	X	X	X	X	X	X	X	X	X			X
Direct Marketing	X	X	X		X	X	X	X	X	X			X
Agricultural Diversification					X	X	X	X	X	X	X		X
Attract New Ag Businesses		X	X		X	X	X	X	X	X			X
Infrastructure Assistance		X			X	X	X	X	X	X			X
Attract New Farmers			X		X		X	X	X	X			X
Farmers Markets		X	X			X	X		X		X		X
Agritourism							X	X	X				X
Community Land Development				X									
EXPORT MARKETING													
Trade Shows	X	X	X	X		X	X	X	X	X	X	X	X
Trade Missions and Reverse Buyer's Missions	X	X	X	X	X	X	X	X	X	X		X	X
Trade Leads	X	X	X	X		X	X	X	X	X		X	X
New Markets Creation and Development	X	X	X	X	X	X	X	X	X	X	X		X
Consulting	X	X	X	X		X	X	X	X	X	X		X
International Trade Office	X	X	X	X			X	X	X			X	X
Export Newsletter	X			X			X	X	X	X			
Diplomatic Assistance	X			X			X		X	X		X	X
BUSINESS ENHANCEMENT													
Business Planning and Consulting		X	X	X	X	X	X	X	X	X		X	X
Partnerships/Networking			X	X	X	X	X	X	X	X	X		X
Value-added Processing			X	X	X	X	X	X		X	X		X
New Products Development and Marketing		X			X	X	X	X	X	X			X
Infrastructure Development		X	X	X	X	X	X	X	X	X	X		X
Publications			X		X	X	X	X	X	X			X
Develop/Market New Ag Products								X	X	X	X		
Alternative Technologies/Practices				X	X	X		X		X			X
Marketing Boards/Marketing Orders	X	X						X					X

Table 1. AED Strategies and Tactics in New York's Competitor States and Provinces

	CA	FL	MD	MI	MN	NJ	NC	Ontario	PA	Quebec	VT	WA	WI
BUSINESS ENHANCEMENT (cont.)													
E-commerce		X					X	X			X		
Equipment Evaluation/Assessment			X	X	X					X	X		
Web-site Development Assistance								X	X		X		
ADVERTISING AND PROMOTION													
Advertising and Promotional Activities	X	X	X	X	X	X	X	X	X	X		X	X
Labeling	X	X	X	X	X	X	X	X		X			X
Fundraising for Producers		X						X				X	
EDUCATION/INFORMATION													
Information Dissemination/Educational Programs	X	X	X	X	X	X	X	X	X	X	X	X	X
Seminars/Workshops/Demonstrations/Training	X		X	X	X	X	X	X	X	X	X	X	X
Newsletter	X	X	X	X			X	X	X	X			X
Materials Development						X	X		X	X			X
FINANCIAL ASSISTANCE													
Financial Counseling/Consulting Services			X	X	X	X	X	X	X	X	X	X	X
Subsidies/Low Interest Loans		X			X			X	X	X			X
Direct Producer Loans					X		X	X	X	X	X		X
Lender/Enterprise Match-Up				X	X	X	X	X					
Competitive Grants	X				X	X		X	X	X	X		X
Guaranteed Loans					X			X	X	X			X
Cost-sharing		X				X	X						X
Competitive Grants					X			X	X	X		X	X
Tax Exemptions/Assistance				X		X		X					
Security for Default Payments					X			X		X			X
Back to School Grants								X	X	X			X
RESEARCH/DATABASE													
Research	X	X	X	X	X	X	X	X	X	X			X
Data Base-Assembly/Maintenance	X	X	X	X	X	X	X	X	X	X		X	X

Table 1. AED Strategies and Tactics in New York's Competitor States and Provinces

	CA	FL	MD	MI	MN	NJ	NC	Ontario	PA	Quebec	VT	WA	WI
RESEARCH/DATABASE (cont.)													
Producer/Export Directories		X	X	X	X	X	X	X	X	X			X
REGULATORY													
Monitoring/Regulation/Enforcement	X	X	X	X	X	X	X		X	X	X	X	X
Certification/Accreditation	X		X			X			X	X			X
Administrative Guidance		X	X	X	X					X	X		X
Investigative											X	X	
OTHER													
Board/Commission Membership							X	X					X
Alliances				X				X					X
Cooperatives Development					X						X		
Mediation Services								X					X
Local Council Development							X						
Marketing Clubs Development					X								
Rural Issue Resolution				X									

Figure 5. AED Programs with a Focus on Domestic Marketing, 11 States, Ontario, and Quebec

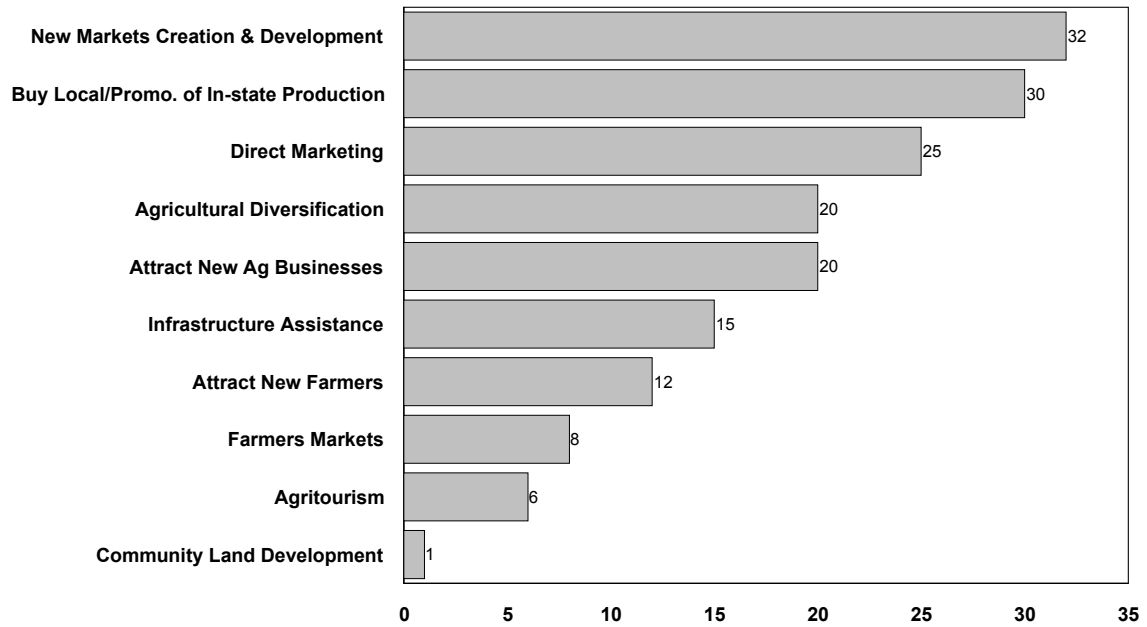


Figure 6. AED Programs with a Focus on Export Marketing, 11 States, Ontario, and Quebec



Figure 7. AED Programs with a Focus on Business Enhancement, 11 States, Ontario, and Quebec

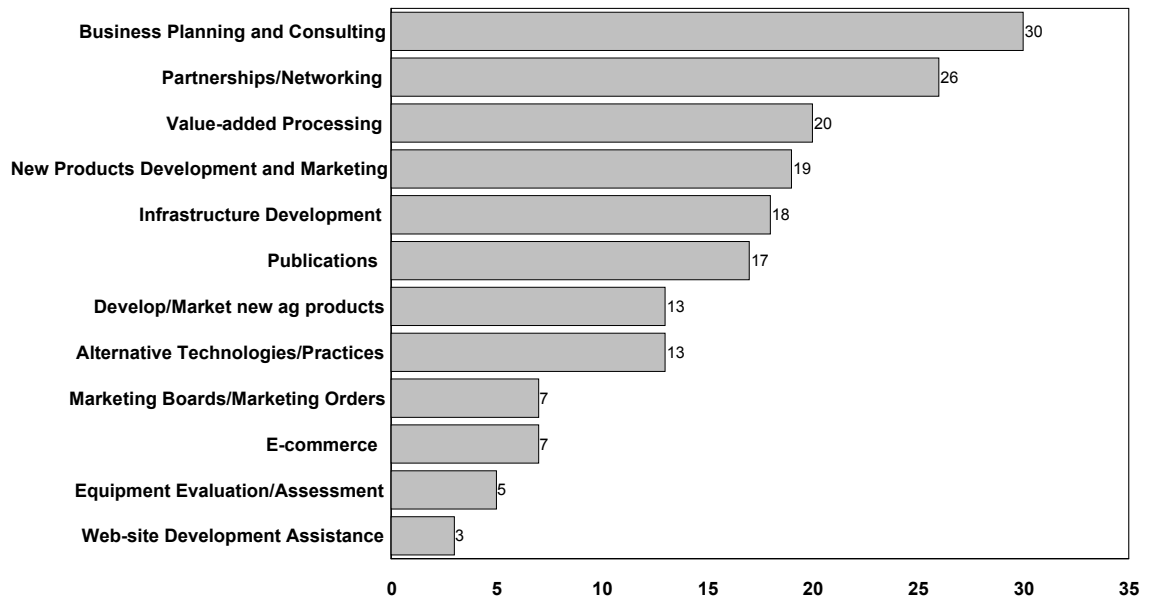


Figure 8. AED Programs with a Focus on Advertising, Promotion, Education, and Information, 11 States, Ontario, and Quebec

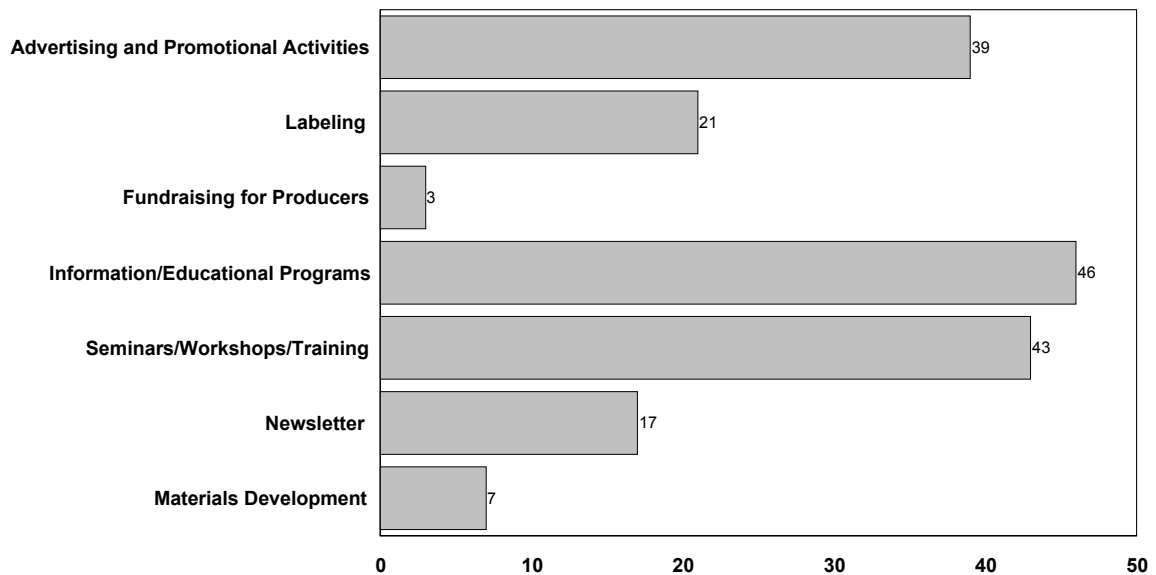


Figure 9. AED Programs with a Focus on Financial Assistance, 11 States, Ontario, and Quebec

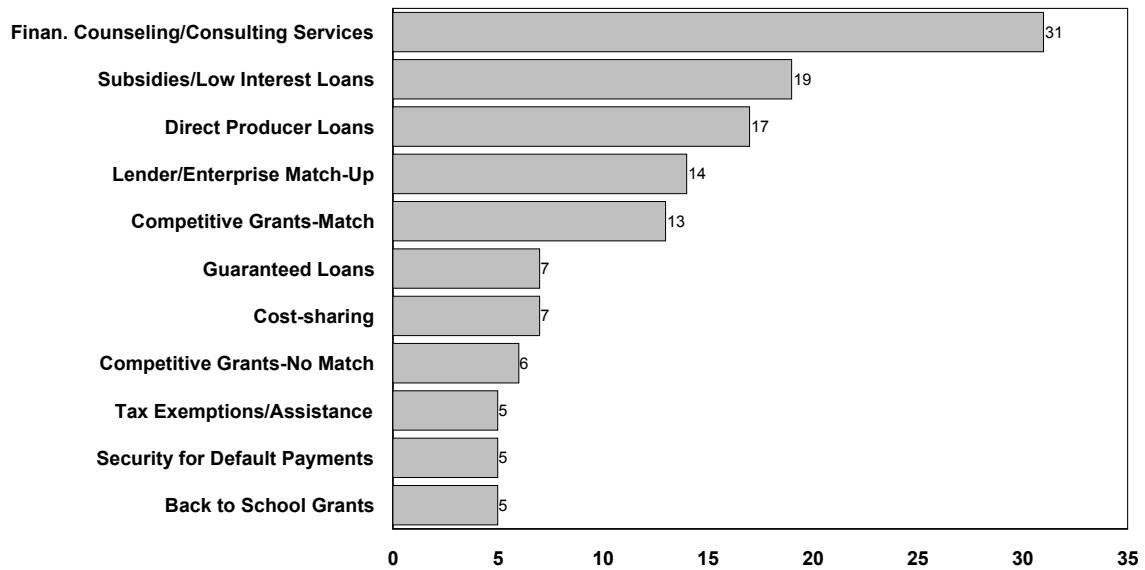
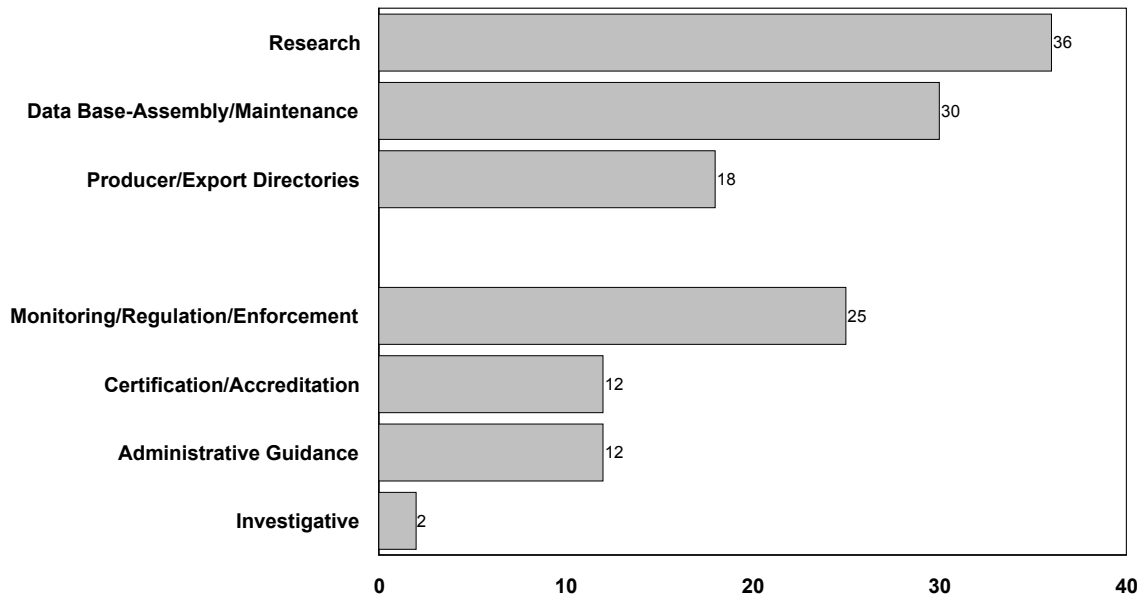


Figure 10. AED Programs with a Focus on Information or Regulation, 11 States, Ontario, and Quebec



APPENDIX A

AED Programs in 11 Competitor States and 2 Canadian Provinces

Table A-1. AED Programs in 13 Competitor States and Provinces

<i>State or Province</i>	<i>Program/Unit</i>	<i>Primary Audience</i>
California	Market Enforcement Branch	Dealers and Food Processors,
California	Marketing Programs (Commissions, Marketing Boards, and Councils)	Agricultural Producers
California	California Agricultural Export Program (administers the Food and Agricultural Promotion Campaign - Taste the Sunshine)	International buyers and domestic suppliers
California	Food and Agricultural Promotion Campaign (Taste the Sunshine)	Farmers
California	Marketing Branch	50+ Marketing Orders, councils, and commissions operating under the Food and Ag Code
Florida	Bureau of State Farmers' Markets (oversees Ag-Venture Services)	Ag businesses
Florida	Ag-venture Services	First or expanding businesses
Florida	Florida Agricultural and Promotional Campaign (Fresh from Florida)	Wholesalers, retailers, producers, and processors
Florida	Bureau of Development and information	Producers, buyers, retailers, food editors and consumers
Florida	Bureau of Seafood and Aquaculture	Aquaculturists
Florida	Division of Aquaculture	Commercial aquaculturists and shellfish processors and harvesters
Maryland	Agribusiness Development Program	Entrepreneurs interested in wines, grains, milk, specialty foods, and sea food
Maryland	Agricultural Statistics Service	Farm operators and agri-businesses
Maryland	Aquaculture and Seafood Programs Office	Aquafarmers
Maryland	International Marketing and trade Development	Farmers, Watermen, and Agribusinesses
Maryland	Marketing and Agricultural Development (oversees International and Marketing Development, Maryland Organic Program and Agribusiness Development Program)	Food and Agricultural Industry (farmers, agribusinesses and commodity organizations)
Maryland	Maryland Organic Program	Organic Farmers

Table A-1. AED Programs in 13 Competitor States and Provinces (continued)		
State or Province	Program/Unit	Primary Audience
Michigan	Marketing and Communications Division (includes International Marketing?)	Food and Agricultural Industry
Michigan	Office of Agricultural Development	Processors, Producers, and Communities
Michigan	International Marketing	Agribusiness; food and ag exporters
Michigan	Agricultural Processing Renaissance Zones	Agricultural Processing Facilities
Minnesota	AGRICULTURAL MARKETING SERVICES DIVISION (Oversees the Minnesota Grown Program, Minnesota Grown Logo, and Value-Added Agricultural Cooperative grant Program)	Food and Agriculture Industry, Consumers
Minnesota	Minnesota Grown Program	Growers, processors
Minnesota	Minnesota Grown Logo	Food and Agriculture Industry
Minnesota	Value-Added Agricultural Cooperative grant Program	Cooperatives
Minnesota	Agricultural Improvement Loan Program	Producers and family farm corporations
Minnesota	Aggie Bond Beginning Farmer Loan Program	Beginning farmers
Minnesota	Basic Farm Loan Program	Individuals who intend to be full-time farmers
Minnesota	Value-Added Stock Loan Program	Producers
Minnesota	Restructure II Loan Participation Program	Producers
Minnesota	Seller Assisted Loan Program	Producers
Minnesota	Livestock Expansion Loan Program	Producers
Minnesota	Organic Farming	Producers
Minnesota	Demonstration Grants	Producers
Minnesota	AGRICULTURAL DEVELOPMENT DIVISION (oversees Energy and Sustainable Ag Program, The Agricultural Best Management Practices (Ag BMP) Loan, Sustainable Agriculture Grant and Loan, and Manure Digester Loan Programs	Producers
Minnesota	Energy and Sustainable Agriculture Program	Food and Agriculture Industry
New Jersey	DIVISION OF MARKETS (includes Jersey Fresh Advertising and Promotional Program, and Export Development Programs)	Food and Agriculture Industry

Table A-1. AED Programs in 13 Competitor States and Provinces (continued)		
<i>State or Province</i>	<i>Program/Unit</i>	<i>Primary Audience</i>
New Jersey	Jersey Fresh Advertising and Promotional Program	Ag Organizations
New Jersey	Fish and Seafood Development Program	Fish and Seafood Industry
New Jersey	Export Development Programs	Food and Agriculture Industry
New Jersey	DIVISION OF RURAL RESOURCES (oversees Fish and Seafood Development Program)	Food and Agriculture Industry
New Jersey	Rural Development Services Program	Farmers and Farm-Related Industries
New Jersey	Commodity Councils	Agri-businesses
New Jersey	Urban Farmers Markets (Under the Div. of markets)	producers
North Carolina	Goodness Grows in North Carolina (Oversees Flavors of NC, Virtual Supermarket, Freshness from NC Waters, Tar Heel Kitchen, and Goodness Grows VISA)	Consumers, retail, and food service industries
North Carolina	Retail and Foodservice Marketing Section	Restaurants, food distributors, chefs, and schools
North Carolina	Agribusiness Development Program (under the Marketing Div.)	Agribusinesses
North Carolina	Farmers Markets	Producers
North Carolina	North Carolina Marketing Centers (under the Marketing Div.)	Producers
North Carolina	International Trade Office	International buyers and suppliers
North Carolina	North Carolina Agribusiness Council	Agri-business enterprises and groups
Ontario	Market Development Branch (Oversees Export Services, Foodland Ontario Logo Program, Brand Services Supervision)	Ag and Food Industry
Ontario	Foodland Ontario Retailer Awards Program	Producers
Ontario	Export Services	Producers
Ontario	Programs and Services for Ontario Farmers (includes Economic Development (5), Training and Information (4), Loan Programs (1), Advance Payment Program (1), Tax Programs (2), Insurance Programs (2), Income Stabilization, Farm Relief and Debt Mediation Programs (3)	Farmers
Ontario	Food Ontario Logo Program	Producers
Ontario	Brand Services Supervision	Producers

Table A-1. AED Programs in 13 Competitor States and Provinces (continued)

State or Province	Program/Unit	Primary Audience
Ontario	Research and Development (under the Food Industry Competitiveness Branch) <i>Includes Agr-Food R&D Matching Investment Initiative, Industrial Research Assistance Program, Field Advisory Service, Pre-commercialization Assistance, Strategic Alliances, Industrial Fellowship Program, The Canadian Technology Network, CISTI, NSERC, Technology Inflow Program, Technology Partnerships Canada, Revenue Canada)</i>	Producers, Agribusinesses
Ontario	CanAdapt	All except individuals
Ontario	Healthy Futures	All
Ontario	E-Business	Food and Agriculture Industry
Ontario	Agri-Food Funding (under the Food Industry Competitiveness Branch)	Food and Agriculture Industry
Ontario	Business Retention and Expansion	Food and Agriculture Industry and communities
Pennsylvania	Domestic and International Trade Development Division	Producers
Pennsylvania	Bureau of Market Development (<i>oversees Domestic and International Business Development Div, Commodity Promotion Div, Livestock and Fair Div, and Div of Aquaculture</i>)	Food and Agriculture Industry
Pennsylvania	Livestock and Fair Division	Producers
Pennsylvania	Division of Aquaculture	Current and prospective aquaculture farmers
Pennsylvania	Commodity Promotion Division	Farmers
Pennsylvania	Farmer Loan Program	Beginning and First-time Farmers
Pennsylvania	Pennsylvania Hardwoods Development Council	Producers
Quebec	Market Development - <i>La direction du developpement des marches</i>	Agri-food businesses
Quebec	Agri-Business Support - <i>Direction Generale de l'alimentation - DGA(oversees Management Offices of Market Development and Business Support and ConcertAction and Quality Management Programs)</i>	Food and Agriculture Industry
Quebec	Horizon Export	Agribusinesses - including start-up businesses

Table A-1. AED Programs in 13 Competitor States and Provinces (continued)		
State or Province	Program/Unit	Primary Audience
Quebec	Commercial Fishing and Aquaculture - <i>Direction Generale ses pesches et de l'aquiculture commerciales - DGPAC</i>	Aquaculture Industry
Quebec	Agricultural Policies - <i>Direction Generale des politiques agricoles - DGPA (oversees Analysis and Economic Information, Research and Development, Marketing Policies, Research and Data Analysis and Agricultural Income Security)</i>	Food and Agriculture Industry
Vermont	Producer Group Internet Development	Producers
Vermont	Consumer Assurance Section	Food and Agriculture Industry
Vermont	Vermont Seal of Quality Program	Food and Agriculture Industry
Vermont	Best Management Program	Producers
Vermont	Milk Quality Enhancement Program	Producers
Vermont	Export Development Programs	Producers
Washington	Commission Merchant Program	Commission Merchants, Dealers, Brokers, and Cash Buyers
Washington	International Marketing Program, including offices in Asia and S. America	Ag Exporting Firms
Wisconsin	Financial Security Programs for Agricultural Producers	Producers
Wisconsin	Wisconsin Farm Center	Farmers and families
Wisconsin	International Agribusiness Center	Agribusiness companies/producers, domestic buyers, international buyers, consumers
Wisconsin	Agriculture Loan and Loan Guarantee Programs	Producers or agribusinesses unable to secure conventional credit
Wisconsin	Commodity Grading and Inspection Services	Producers and marketers
Wisconsin	Agricultural Marketing Orders Administration	Producers
Wisconsin	Domestic Marketing Promotion and Value-Added Agricultural Development	Producers, processors, marketers and consumers
Wisconsin	Dairy 2020 Program	Agricultural producers and processors