



Quarterly Report

**to USDA Rural Development
Agricultural Marketing Resource Center
(AgMRC)**

July 1, 2008 – September 30, 2008

Submitted by Iowa State University, Kansas State University
and the University of California.

Center for Agricultural and Rural Development (CARD) Iowa State University

Fourth Quarter Report

July 1, 2008 to September 30, 2008

Goal #1

Create and promote an electronic, Web-based library with powerful search capabilities to make value-added information and other resources available to producers (includes web site development and functions). Provide electronically available information and resources on value-added markets and industries including a wide variety of commodities and products (this includes the Commodities/Products and Markets/Industries sections of the Web site).

No activity for this quarter.

Goal #2

Provide value-added business and economic analysis tools, including information on business principles, legal, financial and logistical issues (information contained in the Business Development section of the Web site).

No activity for this quarter.

Goal #3

Conduct research and analysis on economic issues facing producers involved in value-added business ventures (this includes research activities on all topics included at the Web site).

Research Papers

Babcock, Bruce A. "Breaking the Link between Food and Biofuels." CARD Briefing Paper 08-BP 53, Center for Agricultural and Rural Development, Iowa State University, Ames, July 2008.

Fabiosa, Jacinto F. "Distillers Dried Grain Product Innovation and Its Impact on Adoption, Inclusion, Substitution, and Displacement Rates in a Finishing Hog Ration." CARD Working Paper 08-WP478, Center for Agricultural and Rural Development, Iowa State University, Ames, September 2008.

Goal #4

Conduct outreach activities to disseminate the research and information assembled and developed under the previous three goals. These activities are designed for producers, producer groups, businesses and others involved in value-added agriculture (this includes all outreach activities of the Center including workshops, seminars, newsletters and other delivery methods including individual client requests for specific information).

Newsletter and Other Articles

Babcock, Bruce A. "Breaking the Link between Food and Biofuels." *Iowa Ag Review* 2008 13(3): 1-3, 9.

_____. "Charting Growth in Food Demand." Agricultural Situation Spotlight Feature, *Iowa Ag Review* 2008 13(3): 8.

Presentations

Babcock, Bruce A. "Biofuels, Animal Feed and Impact to Meet the Global Food Supply." Presented at the Conferencia Internacional Sobre Ganado Lechero (CIGAL) National Dairy Conference, sponsored by the U.S. Dairy Export Council (Mexico office) in Guadalajara, Mexico, July 9-11, 2008.

_____. "Statement before the United States Senate Committee on Agriculture, Nutrition and Forestry." Testimony about how biofuels have changed the economics of agriculture. Omaha, Nebraska, August 18, 2008.

_____. Panelist for session "Federal Biofuel Policy: The Academic and Industry Perspective" at Growing the Bioeconomy: from Foundational Science to Sustainable Practice, 2008 Biobased Industry Outlook Conference, Iowa State University, Ames, September 7-9, 2008.

Carriquiry, Miguel. "The Impact of Biofuels on the Prices of Our Agricultural Products." Presented at the 103 International Agro Industrial and Commercial Exposition, Montevideo, Uruguay, September 8 – 12, 2008.

Hart, Chad E. "Alternative Fuels and the Next Generation Beyond Ethanol." Presented at the Iowa Independent Bankers Convention, Okoboji, Iowa, July 17, 2008.

_____. "Food and Fuel: The Debate over Biofuels." Presented at Ames Rotary meeting, Ames, Iowa, July 30, 2007.

Hayes, Dermot. Presentation on balancing food and fuel and the prospects for pork exports at the "All in a Day's Work" program sponsored by the Iowa Soybean Association and Iowa Pork Producers Association, Everly, Iowa, August 19, 2008.

Li, Yuan Li and Hongli Feng. "Assessing the Impacts of Bioeconomy Expansion on Cropland Use in the U.S. Midwest." Poster presentation at Biobased Industry Outlook Conference, Iowa State University, Ames, September 7-9, 2008.

Tokgoz, Simla. "The Impact of Energy Markets on the EU Agricultural Sector." Presented at the XIIth Congress of the European Association of Agricultural Economists, Ghent, Belgium, August 26-29, 2008.

Iowa State University Extension

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After peaking in April 2008 at 5,113 visits per day, daily visits slowly retreated, reaching 4,104 visits in August. Daily visits in September averaged 4,833. As is typical, more visitors were one-time visitors (57%) than were repeat visitors (43%). The average number of repeat visits this quarter was five, and the average length of each visit was 3.4 minutes.

Of the five major sections of the site, the Commodities and Products (C&P) and the Business Development (Bus Dev) sections continue to be the most frequently visited. While visits to both sections declined to around 1,300 per day in August, both rose the following month. C&P climbed to just under 1,600 visits a month and Bus Dev reached just over 1,600. The Markets and Industries section peaked at 375 visits per day in September, while Renewable Energy and Directories and Resources peaked at 25 visits per day.

Overall, the site received nearly 408 thousand visits from July through September and averaged nearly 136 thousand visits per month.

Updated Commodities & Products

During this time, the following 20 Web pages were updated: Agritourism, Barley, Dried beef, Biodiesel, Sweet corn, Cotton, Eggplants, Figs, General biomass, Commodity lamb, Organic lamb, Mustard, International market pork, Pumpkins, Safflower, Sorghum, Sugar beets, White wheat, Red wheat, Wine industry.

AgMRC Web site Changes Planned

Staff continued work on proposed changes to the AgMRC Web site. Global Reach has completed its update of the content management system (CMS) to a newer content management application, thus avoiding potential gaps in server support and upgrades. Web site content will be ported to the new system, and the new CMS application that manages the Web site will go “live” in October 2008. The new CMS will allow for additional newsletters and news lists to be managed much more efficiently.

In the meantime, minor tweaks will be made to the organizational structure. The left navigation will be modified through Global Reach. This new structure will feature a “Hot Topics” section to

highlight topics currently in the news and an “AgMRC Toolbox” to highlight specific feasibility and outlook tools developed for the site.

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Revised Organic Production subsection in addition to altering and adding numerous links to viable external websites.

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Mary Holz-Clause interviewed and prepared profiles of the owners of the following businesses:

- American Natural Soy
- Aquaventures Investment, LLC
- Bailey Foods, LLC
- Black Ankle Vineyards
- Blue Ridge Food Ventures
- Cal/West Seeds
- Cloverdale Growers Alliance
- Dakota Lamb Growers Cooperative
- Dakota Premium Hay
- Eden Farms
- Farmers’ All Natural Creamery
- Farmers Cooperative
- Fessenden Cooperative Association
- Garcia Farms
- Gentz Cattle Company
- Golden Grain Energy
- Heartland Nuts ‘N More

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Trade Show Promotions/Outreach

Staff attended and manned a booth at numerous trade shows to continue development of a user base. The following table represents programs, events and outreach either funded by AgMRC or represented AgMRC as match dollars through staff time and travel dollars.

Date	Event	Location	AgMRC Participant
July 13-17	NACAA Annual Meeting	Greensboro, North Carolina	Booth
July 22-23	North Central Risk Management Workshop for Project Directors	Milwaukee, Wisconsin	Ray
July 29-August 1	Association of Cooperative Educators Conference	Ottawa, Ontario, Canada	Madeline
August 3-8	International Diffuse Reflectance Conference	Chambersburg, Pennsylvania	Connie
August 26-28	Farm Progress Show	Boone, Iowa	Malinda, Linda, Christa, Ray, Connie, Madeline
September 8-9	Growing the Bioeconomy	Ames, Iowa	Craig
September 11-13	AgMRC Advisory Council Meeting	Monterey, California	Ray, Christa, Mary, Don
September 15-19	Galaxy III Conference, Joint Council of Extension Professionals	Indianapolis, Indiana	Ray, exhibit
September 23	Transitioning to Organics Workshop	Greenfield and Orient, Iowa	Linda
September 24	PDI Fall Conference	West Des Moines, Iowa	Bob
September 27-29	Cooperation Works Annual Meeting	Jackson, Mississippi	Madeline

Client Requests

Staff researched and responded to 78 e-mailed questions this quarter, including 22 requests for newsletter subscriptions.

During this quarter, AgMRC received a total of 96 toll-free phone inquiries from 24 different states: including Alabama, Arizona, Arkansas, California, Delaware, District of Columbia, Florida, Illinois, Indiana, Iowa, Kansas, Massachusetts, Michigan, Minnesota, Mississippi, New Mexico, New York, Ohio, Pennsylvania, South Dakota, Tennessee, Texas, Utah and Virginia. Two calls were also received from Canada. Each caller was directed to Web site resources for information or forwarded to specialists for additional assistance.

Additional Public Relations

The summer issue of the AgMRC Action newsletter was distributed via e-mail and made available online. The newsletter is sent bi-monthly to a list of 2,000 names comprised of producers in value-added agriculture, service providers, media and others. Each newsletter consists of an article from one of the partnering organizations in AgMRC, a state profile to give a snapshot of value-added agriculture in certain areas, new research and other updates added to the Web site in the past month, a value-added agriculture business profile and a calendar of upcoming value-added agriculture events.

Features in the newsletter included an article on the growing Hispanic market, predominately Mexican-Americans; an article about the factors contributing to higher food prices; an article highlighting the value of raising heritage animals and heirloom crops; regular value-added agriculture news; and web updates to www.agmrc.org.

Additionally, AgMRC received positive press this past quarter. Articles appeared in the *Farm Bureau Spokesman*, *Iowa Department of Tourism e-traveler*, *Iowa Farmer Today*, *USA Today*, *Wallace's Farmer* and broadcasts on Iowa farm radio.

Kansas State University

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Updated four commodities on AgMRC Web site. Responded to six requests for information on various commodities.

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Began preparing for workshop to be held in late 2008. The workshop, titled “Restructuring Cooperatives,” will cover the advantages and disadvantages of alternative restructuring strategies.

Agricultural Issues Center University of California

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Writing of summaries of our research findings (see Goal 3) and their postings on the Web site has been ongoing. In addition UC AIC continued work on new dairy and wine profiles for the Web site.

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Commodity Profiles (Hayley Boriss, Daniel Sumner, Christopher Gustafson and Marcia Kreith)

The team completed the profile on dairy and dairy products, which await final review. They continued reviewing and refining the wine and wine grapes profile, including reformatting the graphics.

The Measure of Agriculture and the Contribution of Agriculture to the Economy (Daniel Sumner, Hayley Boriss, Henrich Brunke, Marcia Kreith, Kurt Richter, Omid Rowhani and Laurie Treacher)

This report period we focused on editing and reformatting the chapter on inputs to farm production—farm expenditures, capital, labor, pesticides, energy, water, productivity growth, and research and development. We anticipate completion and online availability of this chapter soon, together with the companion chapters on marketing, trade, policy

and risk management; California farms and farmers; and demand and supply. The chapter on the role of agriculture in the economy was posted earlier.

Agricultural Exports (William Matthews, Daniel Sumner, Jonathan Barker, Laurie Treacher and Marcia Kreith)

The team gathered data on the exports of California-produced commodities in 2007. E-mails have been sent to various growers' groups and commodity associations seeking export data, and follow-up phone calls and correspondence are ongoing. As with previous export years, we plan to write an issues brief summarizing the study, and detailed data will be published on the web and by CDFA.

Government Programs, Market Power and International Trade (Sanggon Jeon and Daniel Sumner)

Work continued on this study of the effects of market power on agricultural trade, focusing on fluid milk and processed cheese products. The researchers use market power in a model of trade under the Free Trade Agreement to assess the impact of domestic market power on implications for trade policy.

Effects of Agricultural Policies on Obesity: Increasing Access to Fruit and Vegetables (Virginia Chaidez, Lucia Kaiser, Micki Stewart, Steve Vosti, Julian Alston and Daniel Sumner).

Work slowly continued on this project.

Economics of Traceability and Food Safety (Sébastien Pouliot and Daniel Sumner)

Using the example of cattle traceability in Québec, Pouliot synthesized a new paper this quarter that makes a more thorough argument than the two papers reported last quarter.

Pouliot presented a selected paper at the Canadian Agricultural Economics Society in Québec City on July 1, 2008. The title of the presentation was "The Value of Cattle Traceability to Consumers." He also presented a selected paper, "Evidence of Demand for Traceability," at the American Agricultural Economics Association in Orlando, Florida on July 28.

In addition, a draft paper was completed on the willingness of slaughterhouses to pay for the traceability of steers in Québec. Preliminary results show an increase in the price of Québec steers in the two years after the implementation of the traceability system. However, the increase in the price did not persist after the discovery of BSE in Canada. This suggests that either the increase in the price of Québec steers was not due to the implementation of a traceability system or that the slaughterhouses realized after the discovery of BSE that traceability had no value to them.

Grapevines of Innovation: Diffusion of Innovations in the Wine Industry

(Calanit Bar-Am and Jonathan Barker, University of California and Rolf A.E. Mueller, Universität Kiel)

Writing of the Grapevines of Innovations report is progressing, with a draft expected in October.

Wine and Trade: EU Wine Policy Reform and Market Implications for California Wine (Henrich Brunke, formerly at University of California; Rolf A.E. Mueller, Kiel University, Germany; and Daniel A. Sumner, University of California)

In addition to the *AIC Issues Brief* on this topic, a second publication has resulted from this study and has been posted on the American Association of Wine Economics (AAWE) Wine and Food Economic Blog: Henrich Brunke and Rolf A.E. Mueller. 2008. A Change of Regulations: The Champagne Example.

Economic Effects of Climate Change on the Wine Industry (Calanit Bar-Am and Daniel A. Sumner)

Weather data since the beginning of the 20th century and price data, in some cases for 40 years, have been gathered. Graphics that combine weather data and geographic data have been produced. In August, Calanit Bar-Am gave a talk at the American Association of Wine Economists meeting in Portland, Oregon. The topic was Weather, climate, wine grape characteristics and prices.

Hedonic Wine Pricing Study Using Experimental Methods (Christopher Gustafson and Daniel Sumner)

For this study of consumer valuation of wine attributes, the researchers worked on a simulation of the field data and laboratory data that is to be generated by their experiments. Analyses of both sets of data indicate that the experiments and number of observations planned are sufficient to get statistically significant parameter estimates. Variables relevant to the experiment are appellation, price and variety.

For the laboratory experiment, wines to be used have been selected based on the sensory analysis carried out by the trained sensory panel. Apart from pretesting, the experiment is essentially ready to begin and has waited for the recently completed move by the Department of Viticulture and Enology into its new building. The computer-based framework for the field experiment has been developed and is ready to be implemented. In addition to moving these experiments forward, Gustafson has been reviewing the extensive literature on wine choice, perception, expertise, etc. that has been reported on in the journals of various disciplines.

What Determines the Wine Price? The Significance of American Viticultural Areas (AVAs) in U.S. Wine (Hyunok Lee, University of California, Davis; Daniel A. Sumner, University of California; and Oh Sang Kwon, Seoul National University)

Hyunok Lee, Daniel A. Sumner and Oh Sang Kwon completed revision of their paper "Appellation, Variety and the Price of California Wines" and submitted it to a journal for review.

Regional Agricultural Models (Kurt Richter and Dan Sumner)

AIC has initiated development of several regional agricultural models that relate to land use issues in the Sacramento Valley. The models will focus on the connecting regional economies of scale in agricultural processing and parcel-level agricultural production.

They will also examine the potential of developing short supply chains between local production and urban food consumption.

Definition and Extent of Mediterranean Agriculture (Daniel Sumner and Hayley Boriss, University of California and Cloe Perrin, University of California, Davis)

A paper on this topic was prepared for publication in a book on Mediterranean agriculture.

Pollinators (Hayley Boriss and Daniel Sumner, University of California and Antoine Champetier de Ribes and Cloe Perrin, University of California, Davis)

The first draft of a beekeeping cost study was completed this quarter, and one beekeeper interview completed with data collected. More interviews have been scheduled.

Export Markets and California Agriculture: Understanding the Implications of Trade Barriers Applied to Citrus Products (Bradley J. Rickard, formerly at California Polytechnic State University, San Luis Obispo and now at Cornell University; and Daniel Sumner, University of California)

Much of the recent work on this project is with the economic simulation model. The current model divides fresh citrus production and consumption into five regions where four products are produced, consumed and traded. Trade flows among the five regions are constrained by three categories of trade barriers (tariffs, EU domestic support and phytosanitary regulations). Careful analysis is being carried out to develop ad valorem equivalents for each of the 60 trade barrier possibilities. Early simulation work shows that tariff reductions would yield greater economic benefits to stakeholders in fresh citrus than would cuts in phytosanitary regulations or EU subsidies.

Processing Tomatoes and EU Policies Products (Bradley J. Rickard, formerly at California Polytechnic State University, San Luis Obispo and now at Cornell University)
Rickard gave a seminar at the bi-annual meeting of the World Processing Tomato Council in Toronto, Ontario, Canada on June 10. Here, the talk focused on the impacts of introducing the Single Farm Payment to processing tomatoes in the EU.

On August 26, 2008, Rickard presented a poster to the European Association of Agricultural Economists in Ghent, Belgium. This presentation was similar to the one he gave in June in Toronto but targeted toward an audience of academic agricultural economists.

Examining consumer demand for organic and locally grown food (William J. Rossman, Pennsylvania State University; Jennifer S. James, California Polytechnic State University, San Luis Obispo; and Bradley J. Rickard, formerly at California Polytechnic State University, San Luis Obispo and now at Cornell University)

Recently there is much interest among horticultural producers and processors concerning the marketing of organically and locally produced food. Here we developed a consumer survey that asked respondents to choose an applesauce product from a list of products differentiated by several characteristics. In addition to price, the products were

differentiated by labels that described fat content, nutrition content and whether the product was grown organically and/or locally. The survey was distributed in rural Pennsylvania, and over 1,500 responses were collected, yielding a response rate of 56 percent. Survey results were used to assess consumers' willingness to pay for the five product characteristics in applesauce. We found that consumers were willing to pay more for locally grown applesauce compared to applesauce that was labeled organic or low fat and low sugar. Furthermore, this analysis modeled the effects of consumer characteristics on the demand for applesauce. We find evidence that income, knowledge of agriculture and gender of male all add to the willingness to pay for locally grown applesauce.

Import demand for horticultural products in developed and emerging countries

(Bradley J. Rickard, formerly at California Polytechnic State University, San Luis Obispo and now at Cornell University; Christine M. St. Pierre, International Food and Agricultural Trade Policy Council, Washington, D.C.; and Gabriel M. Becker, University of California, Davis)

This paper reviews research examining production and trade patterns for agricultural products and extends that line of work to consider key horticultural commodities that are understudied, yet important in many regions. Using panel data between 1991 and 2005 across ten countries, we apply a fixed-effects econometric model to consider the impact that prices, incomes, diet and trade openness have had on the quantity of per capita imports. This is done for six horticultural crops: palm oil, tomatoes, oranges, coffee, cocoa and bananas. We find evidence that prices, income and trade openness impact import demand in expected ways and that these effects are stronger in emerging countries relative to developed countries.

The Economic Effects of the Proposed California Ballot Initiative Establishing Space Requirements for Egg Layers (Thomas Rosen-Molina, William Matthews, Joy Mench, Kurt Richter and Daniel A. Sumner)

The draft AIC report, "Economic Effects of Proposed Restrictions on Egg-laying Hen Housing in California," was completed and made available in July 2008. The draft report discusses the California egg industry and the potential effects of Ballot Proposition 2 (Standards for Confining Farm Animals Initiative Statute) on California egg producers. Since then the researchers have been drafting papers for submission to the *Review of Agricultural Economics* and *Poultry Science*.

Biofuels (Daniel Sumner, University of California; and Cloe Perrin and Hyunok Lee, University of California, Davis)

The AIC has expanded the scope of its biofuels project. Center researchers have been working on analyzing the biofuel mandates and worldwide impacts on yield response and land use change. This report period Perrin reviewed the literature containing different trends regarding yield response. In addition, she explored the macroeconomic structure of the Global Trade Analysis Project (GTAP) model, assessed data collection needs and how land, labor and capital elasticities were estimated per crop type, country and length of run. The researchers also looked at the recent coupling of the GTAP model with ecological or consumption models.

In addition, Lee and Sumner worked with researchers from the Institute for Transportation Technology on sustainability issues regarding biofuel. They attended several meetings with researchers at ITT and the staff from California Air and Resource Board (ARB), which plans to develop and implement biofuel-related sustainability standards.

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Materials Made Available for Print and/or Online Posting during this Quarter (partial listing)

Weed Control in Strawberry Runner Plant Nurseries with Methyl Bromide Alternatives, Steven A. Fennimore, Milton J. Haar, Rachael E. Goodhue and Christopher Q. Winterbottom, *Hort Science* 43(5) 1495-1500, 2008.

Methyl bromide alternatives evaluated for California strawberry nurseries, Steven A. Fennimore, John M. Duniway, Greg T. Browne, Frank N. Martin, Husein A. Ajwa, Becky B. Westerdahl, Rachael E. Goodhue, Milton Haar and Christopher Winterbottom, *California Agriculture* 62(2) 62-67, 2008.

Pheromone-based pest management can be cost effective for walnut growers, Kimberly P. Steinmann, Minghua Zhang, Joseph A. Grant, Carolyn Pickel and Rachael E. Goodhue, *California Agriculture* 62(3) 105-110, 2008.

California Wine and the EU Wine Policy Reform, Henrich Brunke, Rolf A.E. Mueller and Daniel A. Sumner, AIC Issues Brief #34, 2008.

A Change of Regulations: The Champagne Example, Henrich Brunke and Rolf A.E. Mueller, AAWE Wine and Food Economic Blog, 2008. <http://wine-econ.org/2008/04/03/a-change-of-regulations-the-champagne-example.aspx>

Outreach Talks

Bradley Rickard gave a seminar at the bi-annual meeting of the World Processing Tomato Council in Toronto, Ontario, Canada on June 10. The talk focused on the impacts of introducing the Single Farm Payment to processing tomatoes in the EU.

Julian Alston presented a paper on “Research Lags Revisited” at the Economic History Association conference at Yale, September 12-13, 2008.

Roberta Cook gave a presentation on “Trends in Marketing Fresh Produce and Fresh-cut Products” when she addressed the Fresh-cut Workshop on the UC Davis campus on September 16-18. About 55 participants, predominantly from industry, heard the talk.

Daniel Sumner participated in a discussion on Biofuels in the Midwest that was convened in Chicago by the Joyce Foundation, September 5-7. The title of his presentation was Trade Policy and Biofuels: Protection, Expansion and Liberalization.

Daniel Sumner and Sébastien Pouliot discussed trade, traceability and food safety at a briefing on food safety convened by the Consulate General of Canada, the California Institute of Food and Agricultural Research, and the Western Institute of Food Safety and Security. The briefing from Canadian food safety leaders was held at the new Robert Mondavi Institute of Wine and Food Science on the UC Davis campus on September 18, 2008.

Ask a Specialist Resource

Marcia Kreith responded to questions received by AgMRC on the following topics:
Sources of maroon carrot concentrate (Riverside County, CA)

Location of services that test for antioxidants (Yolo County producer)

AIC’s help in locating the original source of numbers frequently repeated by the news media, but without attribution, about California’s share of the nation’s production of fruits and vegetables (California Department of Water Resources)

The nutritional difference between the Hass and Jamacan avocado, if any (a registered holistic nutritionist/registered nutritional consulting practitioner/registered orthomolecular health practitioner)

A list of organic dairies in California (California Grain and Feed Association representative, Sacramento)

Clarification on whether AIC’s summaries on foreign export of California-produced commodities also include exports to other U.S. states. The answer: they do not report on domestic trade to other U.S. states. Also asked for sources of by-country and by-state data on export of various California commodities (by commodity) to individual countries as well as to other U.S. states.

Roberta Cook responded to questions about:
Fresh-cut value-added produce. The fresh-cut industry—history, data, information on purchase by ethnicity and the importance of private label. (Rabobank researcher)

Food safety and fresh produce (Rabobank)

Fresh produce data, including the share of households purchasing fresh fruits and vegetables, average amount spent and differences among consumers (a food distributor, Rancho Cordova)