



SUPPLY CHAINS & SOVEREIGNTY: NATIVE-LED FOOD SYSTEMS SOLUTIONS



First Peoples Worldwide
UNIVERSITY OF COLORADO BOULDER

Supply Chains & Sovereignty: Native-Led Food Systems Solutions

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EXECUTIVE SUMMARY

Native food sovereignty has always been, and continues to be, central to tribal sovereignty. Native food systems nourish Native communities physically, emotionally, socially, and spiritually; they are a site of connection to culture and community, a means of caring for human and other than human relatives, a locus of Indigenous education and knowledge sharing, an element of enacting relationships with Native lands, and foundational to Native nations' political and economic self-determination. Native food systems are diverse and deeply connected to the varied landscapes and ecosystems across Turtle Island in which they are situated. The U.S. government sought to separate Native Peoples from their food systems during colonization, targeting Native food systems as the foundation of culture and autonomy, and utilizing settler food systems as a means of control, coercion, and assimilation. However, Native food producers, chefs, and communities continued to practice Native foodways and cultivate sustained relationships with their food systems. This report hones in on Native food supply chains as a vital aspect of food sovereignty, and seeks to elevate Native food system participants who are creating wellness through their work.

This report is based on community-driven applied research. We collected qualitative and quantitative information through direct engagement with a total of 42 Native food entrepreneurs via interviews and focus groups, and 45 Native food entrepreneurs via an online survey. The report delineates factors that shape Native food entrepreneurs' supply chain choices, describes how Native food businesses have been affected by and adapted to the COVID-19 pandemic, and draws upon Native food producers' expertise and experiences to collate recommendations about how to build and expand Native food supply chains.

This research found that Native food service workers and food producers are already cultivating Native food supply chains through their work, and that there is strong interest in strengthening these supply chains. In addition to the cultural, political, environmental, relational, and gustatory value of Native food supply chains, research participants emphasized their economic value.

Spring Alaska Schreiner with amaranth seedlings at Sakari Farms. Photo courtesy of Spring Alaska Schreiner, owner of Sakari Farms.

This report also highlights the interconnections between Native food systems and the health and wellbeing of individuals, communities, and the environment. Native food businesses are creating tremendous social value through their work alongside economic benefits, and the intentional creation of social value is often grounded in Indigenous values that center respectful and reciprocal relationships and prioritize the wellbeing of community as the primary goal of food systems work.

The COVID-19 pandemic brought national attention to existing inequities in Native food systems, and many Native nations and Native people put significant effort into creating access to healthy foods and to Native and Indigenous foods for those who needed it most and were otherwise unable to receive those foods due to lockdown or quarantine policies, or due to financial impacts of the pandemic. The pandemic also brought an infusion of federal funding that many Native nations chose to invest into food sovereignty in the long term. During the pandemic, there was a notable increase in demand for Native-produced foods from Native nations and Native organizations, and many Native food entrepreneurs reoriented their lives and careers towards further prioritizing Native food systems work. While Native communities experienced profound and disproportionate losses, research participants emphasized that the pandemic served as a catalyst for Native people to contribute to beneficial food systems work both within and beyond Indian Country. Still, inequities within Native food systems persist, and there is more work to be done. In the context of the ongoing disruptions created by the COVID-19 pandemic, there is an opportunity to make significant changes as we move forward with strengthening Native food systems. This also represents an opportunity for Native Peoples to build in self-determined, long-term visions for their food supply chains as something to work towards creating for future generations. Native farmers, harvesters, ranchers, fishers, chefs, and food service workers are leading the way in this work. This report provides information and context to support their visions.¹

¹ This research was funded by the Native American Agriculture Fund (NAAF), and was conducted as part of the Seed to Soul project, which is a partnership between First Peoples Worldwide (FPW) and Ben Jacobs and Matt Chandra, co-owners of Tocabe: An American Indian Eatery. While FPW conducted the research independently, the research topic was inspired by the incredible work done by Ben and Matt and their experiences knitting together a Native supply chain for their restaurant and for their online marketplace.



On-farm education at Birds N Things Farm. Photo courtesy of Daisy Perez-Defoe and Rusty Defoe, owners of Birds N Things Farm.



Rusty Defoe caring for a piglet at Birds N Things Farm. Photo courtesy of Daisy Perez-Defoe and Rusty Defoe, owners of Birds N Things Farm.

INTRODUCTION

Food sovereignty is “the right of peoples to healthy and culturally appropriate food produced through ecologically sound and sustainable methods, and their right to define their own food and agriculture systems.”² Indigenous food sovereignty includes the added dimensions of responsibilities and relationships; as Elizabeth Hoover explains, “The concept of Indigenous food sovereignty is not focused only on rights to land, food, and the ability to control a production system, but also responsibilities to and culturally, ecologically, and spiritually appropriate relationships with elements of those systems.”³ Native food systems, as experienced now, have been shaped by systemic racism, colonization, forced removal, genocide and the US government’s intentional attempts to separate Indigenous Peoples from their foodways. Dependence on the commodity food system, created through these policy shifts, continues to have negative impacts on health and wellness, while also extracting wealth from Native economies. Still, Native food producers, chefs, and communities are practicing Native foodways, and these foodways are continually gaining prevalence and presence across Indian Country as Native communities enact food sovereignty through strengthening their relationships with Indigenous foods.

This report focuses on Native food supply chains as a vital approach to enacting food sovereignty. We define “Native food supply chains” as any situation where a Native American-owned food business is sourcing from Native food suppliers, buying from or selling to other Native-owned food businesses, selling to Native customers, or working with Native-owned businesses for transportation, processing, or other aspects of the food supply chain. These supply chains facilitate Native communities’ access to culturally relevant foods produced by Native food producers, and support strong relationships centered around Native food systems. Native supply chains allow Native consumers to access foods that are produced according to Indigenous values, and support the continuation of Native foodways.

² The Nyéléni 2007 International Steering Committee, Nyéléni 2007: Forum for Food Sovereignty 9 (2007).

³ Elizabeth Hoover & Devon A. Mihsuah, *Indigenous Food Sovereignty in the United States: Restoring Cultural Knowledge, Protecting Environments, and Regaining Health* 11 (Elizabeth Hoover & Devon A. Mihsuah eds., University of Oklahoma Press, 2019).

There is also economic value to these chains—strong Native food supply chains keep money circulating within Indian Country, and allow Native businesses to thrive at each phase of processing and distribution. Native supply chains also allow Native food systems participants to have more agency in deciding where to sell their products, and, if desired, ensure that Native-produced foods are feeding Native families. Research participants almost ubiquitously supported the idea of strengthening and expanding Native food supply chains. The COVID-19 pandemic highlighted supply chains as an important topic both nationally and within Indian Country in particular, and brought existing inequities in Native food systems to the forefront. The systemic disruptions and infusion of COVID-19 relief funding changed Native food systems in significant ways, and this moment is ripe for future visioning and planning for how to strengthen food sovereignty. This report contributes to the national conversation by highlighting the voices of Native food systems participants, centered around the topic of Native food supply chains.

Previous reports provide crucial information on how the COVID-19 pandemic impacted Native food systems. The Intertribal Agriculture Council administered a survey which found that by April 2020, already 79% of Tribal/Community leaders reported a “Production to Processing” Gap, and 35% of respondents reported a supply chain disruption due to COVID.⁴ The *Cultivating Resilience in Indian Country* report, released in May 2021, found that tribal producers experienced unstable agricultural markets, delayed supply chains, and shifting market channels. It also highlights data invisibility pertaining to Native people and nations as a pressing issue. The report presents a strong argument for local food systems, saying “As the pandemic has caused large disruptions to food supply chains, the advancement of regional food distribution and local food economies can help ensure food security, budget efficiency, and food system resiliency. [...] A concentrated and consolidated food system that relies on national distribution is not positioned to adequately meet diverse needs throughout Indian Country on a good day, nor handle disruptions like the pandemic on a bad one.”⁵ In July 2021 First Nations Development Institute released the report *COVID-19 in Indian Country*, which found that while the pandemic exacerbated existing barriers and inequities, Native nations found resourceful and resilient ways to take care of their communities.

The report also outlined how to build a more resilient federal pandemic response in Indian Country, and highlighted how “Data genocide” or lack of data on food insecurity, health disparities, and COVID cases/deaths on Native nations creates significant roadblocks to allocating federal funding in equitable ways.⁶ In August 2020, the Indigenous Food and Agriculture Initiative published an impact assessment which found that: COVID-19 exacerbated existing barriers such as lack of market opportunities and difficulty accessing processing facilities; Tribal governments invested in agricultural infrastructure; distribution chains were slowed or disrupted; Native farmers successfully shifted to CSA and/or all-online models; and small scale fruit and vegetable producers were able to adapt more easily, while ranchers and fishers were more profoundly impacted. IFAI concluded that more accurate data is needed that “tells the story of the importance of investing in local food infrastructure,” and that funding and infrastructure were the most pressing needs.⁷ In December 2021, the report *Reimagining Hunger Responses in Times of Crisis* was released, sharing data from the Native American Agriculture Fund’s food access survey, launched in February 2021. The report found that during the pandemic half of respondents experienced food insecurity, and a quarter experienced very low food security. The report also found that despite disproportionately large hunger and health impacts created by systemic racism, “when Tribal governments and Native entities are centered in the role of feeding their people and are provided the proper financial and data support—solutions are actualized and objectives are achieved effectively. A localized, Native-led food system strengthens food security for Native American communities.”⁸ Overall, existing reports highlight negative impacts on Native food producers and supply chains, particularly during early phases of the pandemic; Native nations’ and organizations’ proactive responses; and policy recommendations to support stronger Native food systems.

⁴ IAC 2020 COVID-19 Survey Results, Intertribal Agriculture Council, public.tableau.com/app/profile/andrea.akers.mader, www.indianag.org/post/covid-19-preliminary-survey-results (last visited June 29, 2022).

⁵ Joel Anderson & Olivia Chan, *Cultivating Resilience in Indian Country: An Assessment of COVID-19’s Impact on Tribal Food Systems* 32 (2021).

⁶ A-dae Romero-Briones, Sarah Biscarra Dille & Hillary Renick, First Nations Development Institute, *COVID-19 in Indian Country: A Call to Integrate Food Systems and Food Security Toward Sovereignty* (2021).

⁷ Indigenous Food and Agriculture Initiative, *American Indian and Alaska Native August 2020, Local and Regional Food Systems Response to COVID*, [lfscovid.localfoodeconomics.com/impact_assessments/american-indian-and-alaska-native](https://localfoodeconomics.com/impact_assessments/american-indian-and-alaska-native) (last visited June 29, 2022).

⁸ Toni Stanger-McLaughlin, Sandy Martini, Geri Henchy, Katherine Jacobs, Erin Parker & Valarie Segrest, *Reimagining Hunger Responses in Times of Crisis: Insights from Case Examples and a Survey of Native Communities’ Food Access During COVID-19* 47 (2021).

Native organizations have also released reports on Native food systems which present relevant findings about Native food supply chains. The 2015 Intertribal Food Systems report highlights community-based changemakers and enterprises within Native food systems. Some entities are highlighted for sourcing from Native producers; the report found that “These—and many more—Native-owned, Native-controlled agribusinesses drive change and increase market access for all Native producers when they prioritize sourcing their food products from Native farmers and ranchers.”⁹ The Native American Agriculture Fund’s *Reimagining Native Food Economies* report delineates a model for Native food systems based around regional food hubs and sub hubs across Indian Country. In addition to providing a valuable, solutions-oriented model for food sovereignty and economic data on the impact of this model, the report’s policy recommendations highlight the importance of infrastructure.¹⁰ The NAAF report takes a future visioning lens that we build on in our report.

Many of the reports cited above emphasize the lack of data on Native food systems, and the importance of data sovereignty. Our report contributes to the body of information about pandemic impacts on Native food systems, and fills in gaps in existing information on Native food supply chains. The data featured in this report was collected from September 2021 through March 2022, and so provides information that encompasses both earlier and later phases of the pandemic. It includes case studies drawing from the on-the-ground perspectives of Native food systems participants, to address how the pandemic has shaped their businesses. This report also provides a level of detail on Native food supply chains that is not provided elsewhere. It brings together information on enterprises at different levels within the supply chain and from different sectors within the food system—including Native food service businesses, purveyors, and processors, in addition to food producers—and puts them in conversation with one another to provide a perspective across the supply chain. There is a gap in available information about how Native food systems participants navigate their supply chains, and the factors, constraints, and values that influence their supply chain choices; this report provides information directly from Native food businesses to give context on how they make choices about who to sell to or source from. This perspective informs recommendations on how to increase linkages between Native food businesses to bring Native-produced foods to Native consumers via Native processors, food service businesses, and distributors. Each of the following topics are taken on in this research: Native enterprises’ supply chain practices in the food service, farming/harvesting, fishing, and ranching industries respectively; Native supply chain trends that are present across industries; ways the pandemic impacted Native food businesses; the social value created by Native food businesses; and research participants’ interest in and future visioning for the structure of Native food supply chains. Finally, the recommendations are built on desk research and qualitative and quantitative data sourced from Native food systems participants, to build linkages that strengthen Native food supply chains.

⁹ Indigenous Food and Agriculture Initiative, *Intertribal Food Systems* 41 (2015).

¹⁰ Native American Agriculture Fund, *Reimagining Native Food Economies: A Vision for Native Food and Agriculture Infrastructure Rebuilding and Recovering* (2021).

8 INTRODUCTION

Supply Chains & Sovereignty: Native-Led Food Systems Solutions

METHODS

This research utilized a mixed methods research design to collect qualitative and quantitative information from Native food business owners via interviews, focus groups, and a survey. Utilizing three methods of gathering data allowed us to triangulate findings and look for confirmation of themes. The information showcased in this report was gathered through direct engagement with Native food systems participants from September 2021 through March 2022. We completed interviews with 18 people representing 14 Native food enterprises, and conducted four focus groups with a total of 24 people representing 23 Native food enterprises. The interview and focus group participants are located in 13 states across the US;¹¹ 26 of these enterprises are owned by Native individuals or organizations, and 11 of these enterprises are tribally-owned.¹² We administered a survey for Native food enterprises that received 45 responses. Interviews provided detailed information on how Native entrepreneurs are navigating their supply chains. Focus groups created a space for conversation specific to the ranching, fishing, farming, and food service industries respectively, and allowed participants to surface barriers and assets relevant to strengthening Native supply chains for their mode of food production. The survey provided statistics on supply chain trends and pandemic impacts, from a larger group of Native food systems participants.

Throughout the research we included people representing both tribally-owned and operated enterprises, and businesses owned by individual Native entrepreneurs. We included research participants from a variety of types of enterprises, geographic regions, scales, and levels of the supply chain. We also included both people who are in the Intertribal Agriculture Council producer directory, as well as people who are not. This approach aims to equitably address the perspectives of Native food entrepreneurs who are involved in supply chains in different ways.

¹¹ The enterprises who participated in the interviews and focus groups are located in Wisconsin, Arizona, New Mexico, Oklahoma, Oregon, Minnesota, South Dakota, Alaska, California, Washington, Colorado, Utah, and Montana.

¹² Two of the tribally-owned enterprises are associated with inter-tribal entities.



Brigette McConville of Salmon King Fisheries.
Photo courtesy of Brigette McConville, owner of
Salmon King Fisheries.

The qualitative focus allowed us to explore the interconnected dynamics within Native supply chains, and incorporate Native food business owners' expertise and lived experiences into the report. We engaged directly with Native entrepreneurs to hear about dynamics that are impacting their businesses, issues that are most important to them, and strategies they would like to see implemented to support their participation in Native food supply chains. This community-driven research approach aims to amplify the priorities of Native food systems participants. We gathered information about the state of Native food supply chains, and compiled actionable recommendations about how to strengthen these chains, grounded in the perspectives and suggestions of Native food producers. We shared the report draft with research participants prior to publication to incorporate their feedback, to ensure that we accurately represented their comments, and to provide participants access to the data and findings.

Interviews were conducted via Zoom or phone calls, recorded with consent, and transcribed for analysis. We interviewed 18 people representing 14 Native food enterprises, comprising 5 restaurants, a caterer, a winery, 2 fisheries, 3 farms, a ranch, and a meat processor. We analyzed the interviews to identify shared themes, and utilized information from the interviews to design questions for the focus groups and survey. Focus groups were conducted over Zoom, recorded with consent, and transcribed for analysis. The first group was composed of 5 Native ranchers, the second of 5 Native fishers, the third of 7 Native farmers/harvesters, and the fourth of 7 Native chefs/caterers. We analyzed the focus groups to identify shared themes and consensus among participants. We used Qualtrics to administer a survey for Native farmers, harvesters, fishers, ranchers, chefs, restaurant owners, caterers, food distributors, and food processors. The survey utilized branching logic to ask tailored questions about the respondent's involvement in Native food supply chains and how the COVID-19 pandemic impacted their business. We promoted the survey via email, social media, and through outreach to Native food, agriculture, and business organizations, 11 of whom promoted the survey to their contacts. We also contacted 121 Native food enterprises to ask for their participation. We received 45 survey responses that included enough information to be utilized in analysis; because of attrition over the course of the survey and the use of branching logic, the number of respondents for each question varied and is either noted or footnoted throughout this report where survey data is used. We analyzed the data utilizing Qualtrics and excel. The survey allowed for the incorporation of more Native food producers' perspectives, confirmation of themes, and provided quantitative data to contextualize information from the interviews and focus groups.

One significant limitation of this research is the small sample size. For this reason, we do not aim to comprehensively represent Native food supply chains throughout Indian Country. Rather, we aim to provide examples and direct comments from Native food systems participants that show their on-the-ground perspectives, and to highlight trends that emerged among the people that we spoke with. We stratified our sample to include perspectives from a variety of enterprises.¹³ However, a second limitation is that the sample did not include any interview or focus group participants who permanently went out of business because of the pandemic.¹⁴ A third limitation is that while we engaged directly with Native-owned restaurants and food service businesses to gather data on their perspective as end markets for Native-produced foods, we did not interview other end markets such as Native institutions, schools, casinos, grocery stores on reservations, or individual Native consumers. We did discuss these end markets with Native food producers, and were able to incorporate producers' perspectives on markets and barriers to reaching Native customers. One area for future research would be to engage with Native institutions and individual Native customers to explore their perspectives on Native supply chains and identify any additional barriers that prevent them purchasing from Native food producers.

¹³ Our sample of research participants varied in terms of type of enterprise, size, location, and ownership (owned by a Native individual vs tribally-owned). However, the vast majority of participants have a business website or social media presence. The perspectives of businesses with no web presence are underrepresented in this research.

¹⁴ One survey participant went out of business during the pandemic, and one interviewee was transitioning towards closing her business for reasons not related to the pandemic. Numerous research participants did temporarily close their businesses during the pandemic, however.

10 METHODS

Supply Chains & Sovereignty: Native-Led Food Systems Solutions

THE CURRENT STATE OF NATIVE FOOD SUPPLY CHAINS

This section presents survey data on the current state of Native food supply chains, and then provides more detailed information on Native supply chains within the food service, farming/harvesting, fishing, and ranching industries, based on data from interviews and focus groups.

Survey respondents operate a wide variety of food systems businesses,¹⁵ and many operate in several aspects of the food system simultaneously. The most common business activity among respondents was farming, followed by processing/making value-added products. Out of 43 respondents, 77% are businesses owned by Native American individuals, 21% are businesses owned by Native tribes or Native nations, and one is a Native organization. Out of 44 respondents, 23% currently utilize the Intertribal Agriculture Council's "Made/Produced by American Indians" trademark, and 77% do not utilize the trademark.

Length of operational history varies widely. Out of 38 respondents, businesses have been in operation for the following amounts of time: 3% under 1 year, 42% 1-5 years, 19% 6-10 years, 11% 11-15 years, 6% 16-20 years, 8% 21-25 years, 3% 26-30 years, 3% 31-35 years, 3% 41-45 years, 3% 56-60 years, 3% 100 years, and 3% 165 years. The large proportion of businesses that are 1 to 5 years old may reflect a recent increase in Native entrepreneurship within food systems. At the same time, some Native food businesses have been in operation for generations.

The majority of survey respondents have a business web presence. Out of 37 respondents, 68% have a website for their business and 32% do not have a website. Facebook and Instagram were the most popular forms of social media used by businesses—out of 27 respondents, 78% use Instagram, and 89% use Facebook.

Many businesses are selling their products via multiple avenues. Out of 34 respondents, 85% sell via in person direct to consumer (DTC) sales, 44% sell via online DTC sales, 38% have a physical retail storefront, 35% sell wholesale to a processor or distribution company, and 26% sell wholesale to a restaurant or food service business. The high proportion of DTC sales aligns with qualitative data from interviews and focus groups, and may indicate that many businesses do not have the supply chain infrastructure, logistics, or product volume to sell wholesale.

Native businesses are reaching Native customers—out of 36 respondents, 78% sell to Native individuals, 50% sell to Native organizations, and 47% sell to Native businesses. However, only 14% said Native individuals make up the largest proportion of their customer base, 8% said Native organizations make up the largest proportion of their customer base, and 3% said Native businesses do. This indicates that there is room to increase proportions of Native customers; qualitative data discussed throughout this report shows that many Native entrepreneurs would like to expand their Native customer bases.

¹⁵ Out of 44 respondents, business types are as follows: 45% farms, 30% processing or making value added products, 27% harvesting/wildcrafting, 25% "Other", 18% catering, 18% distribution, 16% grocery or other food retail, 14% ranches, 14% fisheries or seafood businesses, 7% restaurants, and 2% winery/brewery/distillery. Many respondents selected multiple responses.

Similarly, Native enterprises are sourcing ingredients from Native producers, but not always in large proportions. Participants whose businesses do food service, processing/value-added products, distribution, or grocery/food retail were asked whether they source, stock, or distribute any ingredients or products from Native food producers. Out of 25 respondents, 56% said yes, 20% said no, and 24% said “I don’t know”. Respondents were also asked to consider the total volume of ingredients they use in their business and to estimate the percentage that they source from Native producers. Out of 16 respondents, 44% source less than 10% of their total ingredient volume from Native producers, 13% source 26-50%, 19% source 51-75%, and 25% source 76-100%. Out of 16 respondents, 50% spend less than 10% of their ingredient budget on items sourced from Native producers, 19% spend 26-50%, 25% spend 51-75%, and 6% spend 76-100%. As discussed throughout this report, qualitative data shows that many Native entrepreneurs would like to increase their sourcing from Native producers.

Respondents are sourcing a variety of items from other Native businesses. Out of 14 respondents, businesses are sourcing or distributing the following items from Native producers: 50% are sourcing grains, 50% beans/legumes, 50% meat, 50% processed or value-added items, 36% fresh produce, and 14% fish. Food producers were asked whether they source material inputs from any Native businesses. Out of 28 respondents, 43% said yes and 57% said no. Inputs sourced from Native businesses include lumber, construction, equipment, labor, services such as pregnancy testing for cattle and HACCP trainers, coffee as a CSA add on, plant medicines such as smudges, and seeds.

Many respondents do not have access to adequate supply chain infrastructure. Out of 29 survey respondents, 48% do not have access to adequate processing infrastructure, and out of 31 respondents 39% do not have access to adequate transportation and distribution infrastructure. There is also a specific lack of Native-owned processing infrastructure. 32 survey respondents answered a question about factors that prevent them from participating in a Native supply chain, of those, 53% said there are no Native food processing facilities in their area. As discussed throughout this report, lack of infrastructure is a key supply chain barrier.

Additional survey data is provided throughout this report and in the appendix.¹⁶

A. RESTAURANTS, CATERING, AND FOOD SERVICE BUSINESSES

This section covers Native food service businesses’ iterations of Native cuisine, their customer bases, how they source ingredients, and the factors and values that shape their supply chain choices.

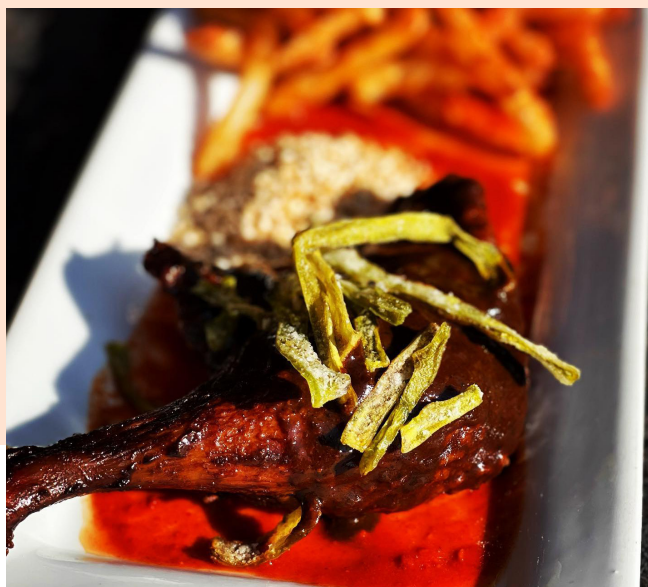
i. Native Cuisine

Native-owned restaurants, food trucks, food stands, and catering businesses present many iterations of Native cuisine, as Native chefs design their menus around varied goals. Some chefs focus on tribally-specific foods, while others focus on pan-Indigenous menu items. Native chefs are offering both foods made with traditional preparations or recipes, and culturally significant foods prepared in creative ways based on contemporary influences. For example, at Indian Pueblo Kitchen, former executive chef Ray Naranjo¹⁷ designed the restaurant’s menu to draw a broad customer base. The restaurant focuses on representing Pueblo cuisine; they offer feast day foods that are popular in specific Pueblos alongside trendy foodie dishes and fine dining items incorporating traditional Pueblo ingredients. Fine dining cuisine can be a powerful representation of Native food and culture, for example Ray’s Pante Project dinner series featured a fine dining menu utilizing regional Indigenous ingredients with themes based on Pueblo cosmologies, including the six directions and their associated colors.

¹⁶ Additional survey data provided in the appendix includes: the age and tribal affiliation of business owners, the number of physical locations their business operates in and whether or not these locations are on a reservation or other tribally-owned lands, businesses’ revenue and profits, legal entity structures, number of employees, types of social media respondents use for their business, details on how businesses involved in distribution are operating, details on who makes up businesses’ customer bases, the number of Native businesses/organizations respondents are selling to, the number of Native producers they source from, items they would like to source from Native producers but currently cannot, reasons they cannot source these items, circumstances that prevent respondents from participating in a Native food supply chain, and open-ended responses addressing the following themes—direct investment in Native producers, support for regional food hub models, and the need for supply chain networking resources.

¹⁷ Ray is now the owner of Manko LLC, which serves Native American fusion food.

Chef Ray Naranjo's "Duck Mole with Popcorn Quinoa Red Chile and Duck Fat Fries." Photo courtesy of Ray Naranjo, former executive chef of Indian Pueblo Kitchen and owner of Manko LLC.



Chef Ray Naranjo's "Po' Pay Bisque of Ripe Squash" featuring squash flowers and seeds, finished with baby amaranth leaves and popped amaranth. Photo courtesy of Ray Naranjo, former executive chef of Indian Pueblo Kitchen and owner of Manko LLC.



Another relevant distinction is between pre-contact, post-contact, and post-removal foods. Pre-contact foods are ingredients that Native Peoples were utilizing prior to European contact, post-contact foods are ingredients introduced via European contact, and post-removal foods are ingredients many tribes relied on after the US government forced them to relocate from their homelands to reservations. Many post-removal foods are ingredients that were provided in commodity food boxes by the US government as a part of treaty obligations. All of these foods can carry cultural significance. While there are Native-owned restaurants that focus solely on pre-contact foods, most of the chefs we spoke with offer either a fusion style of Native cuisine, or pre-contact and post-contact items side by side on their menus.¹⁸ At Tiwa Kitchen Restaurant Ben and Debbie Sandoval offer Pueblo dishes alongside Spanish and contemporary dishes that draw from Native influences. Watecha Bowl's menu combines traditional Lakota foods with powwow style fair foods. At Burning Cedar Indigenous Foods, chef Nico Albert designs her menus in dialogue with her catering customers to address their goals for engaging with Native cuisine. Nico offers strict pre-contact menus, post-contact foods, post-removal foods, modern dishes with Native ingredients, and menus to suit various dietary restrictions.

Many Native chefs are working to support the health of Native communities by providing healthy Indigenous food options. This can include incorporating pre-contact Indigenous ingredients; offering gluten free, vegan, or vegetarian versions of Native dishes (such as Watecha Bowl's gluten-free fry bread); making their food fresh and by hand; or limiting salt and sugar content in keeping with traditional recipes. These choices are grounded in chefs' awareness of the connection between the inadequate nutrition provided by post-removal commodity foods that were forced upon Native communities by the US government and high rates of diet-related health conditions in Native communities.

ii. Customers

A supply chain that is Native from start to finish must include Native customers as an end market. Native-produced foods are reaching Native customers via Native-owned food service businesses, but they are also reaching broader customer bases. Native-owned restaurants are serving both Native and non-Native people in their local communities. Tourists can also be an important customer base for both urban and rural Native-owned restaurants. Native chefs and restaurateurs who offer catering are sharing Native cuisine at local institutions, social gatherings, educational programs, and organizational events. For example, one Native chef provides catering for her state Department of Health, Department of the Secretary, their tribal liaison, local senior centers, and head start schools for local tribes.

¹⁸ Some survey respondents reported offering solely pre-contact foods, or offering decolonized cuisine.

Native-owned restaurants provide spaces for Native community building, while also serving a national or even global customer base. Lawrence West, owner of Watecha Bowl in Sioux Falls, South Dakota, has had customers visit from Ireland, China, New York, Maine, Omaha, Chicago, Washington state, and California. Lawrence described the restaurant as a “melting pot” where people of many backgrounds, races, and ethnicities all come to eat.¹⁹ He shared that at Watecha Bowl you’ll hear Native music and Native languages being spoken, see kids playing, and see elders sharing teachings. This demonstrates how Native-owned restaurants can simultaneously be Native community spaces, while also welcoming tourists and non-Native locals into their customer base. Overall Native-owned restaurants are places where people of varying backgrounds can come together around Native cuisine. This relates to the two-fold goals of most Native food service businesses: increasing visibility of and appreciation for Native foods, and providing Native food access and community building spaces for Native people.

iii. Sourcing Practices

Native chefs and food service workers tend to combine multiple approaches to ingredient sourcing, such as harvesting their own ingredients; sourcing from commercial distributors, grocery stores, and large online retailers; and direct sourcing from local Native and non-Native food producers.

a. Self-sourcing and Local Sourcing

A number of chefs spoke about sourcing ingredients from their own gardens, such as squash, varieties of Native corn, chokecherries, and Ch’il ahwééh or Greenthread. Ben and Debbie Sandoval grow their own Pueblo white corn and Hopi blue corn from seeds members of the Hopi tribe shared with them 30 years ago, and utilize the corn at Tiwa Kitchen Restaurant. Some chefs harvest wild ingredients: Ben and Debbie harvest wild plums and catch fish, chef Nico Albert harvests sumac, and chef Valene Hatathlie harvests juniper to make her own juniper ash. Out of 8 survey respondents with food service businesses, 75% said they personally grow or harvest some of their ingredients. Some Native chefs are also farmers. One chef who runs a food service business also works on an educational farm; he explained “I’m actually in a really cool place right now, working on the farm, because I get to actually put the food in the farm out into the ground, and then take care of it, and then harvest it and then use it again.”²⁰ Native chefs and food service business owners also source ingredients from local food producers, typically through direct purchasing either on-farm, at local farmers markets, for delivery, or through CSAs.

b. Sourcing from Commercial Distributors and Grocery Stores

Native chefs are also sourcing from large scale national commercial distributors, such as Shamrock and Sysco, and from regional distributors. This can be a strategy for sourcing some items at less expensive prices, or for reliably sourcing high volume ingredients. Chefs also turn to distributors for items that are difficult to source from Native producers, such as oil, flour, and non-food supplies like cutlery. Some chefs also use distributors to source fresh produce items that they need consistently but in smaller quantities, for example lettuce. Some chefs and food service workers buy ingredients by the case from their local grocery stores when the prices are better than those offered by distributors. Chefs also turned to grocery stores when pandemic-related supply chain issues created access barriers. For example Ben and Debbie Sandoval purchased flour and oil from a regional distributor prior to the pandemic, but when the distributor stopped coming during the pandemic, they began buying those items at a grocery store. Some chefs purchase ingredients from large retailers online—several chefs mentioned that many pre-contact foods, such as amaranth, quinoa, and sumac, are most easily purchased on Amazon when they are looking to buy large quantities at lower prices.

¹⁹ Zoom Interview with Lawrence West, Owner, Watecha Bowl (Sep. 29, 2021).

²⁰ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

c. Direct Sourcing from Native Food Producers

Native chefs are sourcing both traditional pre-contact foods and post-contact foods from Native food producers. Many Native food producers lack access to key supply chain logistics, and there is currently no national large scale Native food distributor. When chefs cannot access Native-produced foods through national or regional, or local distributors, they instead purchase directly from Native food producers and solve for supply chain logistics themselves. When possible, one of the simplest approaches to direct sourcing is ordering by mail. However, the cost of shipping can be a barrier. Vanessa Casillas, former business manager of Gatherings Cafe, described shipping costs for Native products sometimes being insurmountably high. Vanessa stated that many of the food producers she bought from weren't aware that they can negotiate lower rates with their shipping providers, and described how this can be a barrier to market access:

Some of the businesses don't understand that they can negotiate shipping rates. And that will greatly affect on the customer's end who can afford to purchase from them. So what I saw was there were several vendors who knew this [...]. But if the people doing the business don't understand that they can negotiate these rates, then they're paying almost double or triple for shipping. And that cost gets passed on to the customer, which then prices them out as a competitor for other businesses who know this.²¹

In some cases high shipping rates meant that Vanessa would have to look for a different Native supplier, however in other cases she was able to collaborate with the food producer to solve the issue. In one case Vanessa shared information about how to negotiate shipping rates with a Native ranching enterprise, including some example rates from another Native business she worked with. The ranching enterprise was able to negotiate lower shipping rates, which enabled Vanessa to purchase from them. This is one example of how people are solving for Native supply chain barriers by sharing information.

Many Native food service workers also described direct sourcing in person. In some cases, Native food producers are able to meet chefs halfway, or provide delivery to neighboring states when they can line up enough sales to make the drive worthwhile. In other cases, chefs will drive significant distances to purchase from Native producers. Chefs described meeting up with food producers in parking lots or at gas stations to make direct purchases. One chef arranged to meet a farmer in an Albertsons parking lot, and stated that onlookers in the parking lot stared as she loaded bags of chiles into her car, perhaps because it looked like some sort of criminal activity. However, as this chef said, "It's not a drug deal, it's a food deal!"²² Multiple chefs described figuring out the logistics to make these "food deals" work. Native chefs are also drawing on their social networks by having friends or colleagues who belong to other tribes purchase and transport food for them when they visit their homelands or their reservations.

For larger scale purchases or purchases from suppliers that are further away, chefs sometimes must plan more elaborate supply chain logistics, such as hiring existing distribution companies to transport the items. For example, Ben Jacobs and Matt Chandra, co-owners of Tocabe: An American Indian Eatery, coordinated logistics to purchase from both Ute Mountain Ute's Bow and Arrow Brand and Navajo Agricultural Products Industry, who did not have mechanisms in place to transport product wholesale to Denver. Ben and Matt hired a transport company to move the pallets of product, and worked with the company and the farms to coordinate the product pickup. Ben and Matt also coordinated logistics to purchase buffalo directly from a Native rancher on the Cheyenne River Reservation, this included buying a livestock trailer for one of Ben's family members to use to haul the buffalo to the Osage Nation's meat processing plant. Ben explained how this was necessary to create a Native supply chain:

²¹ Phone Interview with Vanessa Casillas, former Business Manager, Gatherings Cafe (Oct. 19, 2021).

²² Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

I felt like, for what we were attempting to do, that's the true definition of building a supply chain from start to finish. As Matt and I had wanted to do, is how do you keep money cyclical, how do you keep money in the community. And the epitome of that idea was going to a rancher, raising the animals, and then having my cousin, a Native individual, actually picking animals up, transporting them to sovereign land, having a tribal entity doing all the processing and packaging, and then brought to here to be redistributed. That was the major goal. We just picked the hardest possible thing, which was a live animal, to do that with, it wasn't just like dried corn. So logistically speaking that was really hard, to the point that the only option was to buy a trailer to transport the animals. [...] But if we're talking about Matt's and my method, if [a Native supply chain] is the idea and this is the goal, then we have to sort for whatever those issues may be, and if that means we have to figure out how we're going to buy a trailer in the next 48 hours then we're going to figure out how to buy a trailer in the next 48 hours.²³

Ben highlights how Native chefs are stepping in to build Native supply chains in situations where key infrastructure and logistics are lacking. Overall, chefs are creating innovative informal and formal distribution networks to move food from one place to another and solve for Native supply chain barriers.

d. Motivation for Direct Sourcing

Chefs stated that the extra work that can go into direct sourcing is worthwhile because it keeps money within Native hands; because the food itself is culturally significant and of higher quality; and because direct sourcing is a way of building community and making relationships that honor food producers' work. A chef who runs a community outreach catering program explained:

I do a lot of direct sourcing. Part of the community building aspect is going to the source. I really appreciate going and honoring the work that's being done in maintaining and sharing the traditional knowledge and the traditional practices. I know it's not like a production level sourcing, but it makes it a much more valuable experience. And I like honoring that practices continue in our communities. And being able to support—I'm willing to pay what they need me to pay to source them, to continue that work being done. So I like to go directly to the source and get whatever I can. And it's a little bit more time consuming to be able to do it that way, but the quality is so much better.²⁴

Connecting with Native food producers and recognizing their work as knowledge keepers builds community around Native foods. Native chefs also described an economic motivation for direct sourcing—they want to direct money towards Native vendors whenever possible. Chefs spoke about how middlemen drive up prices, and when middlemen are not Native-owned businesses, value leaves Native supply chains rather than circulating within Indigenous economies. Chefs also source directly to access Indigenous foods they cannot find elsewhere. Additionally, chefs said the food they source directly is higher quality, and that you can taste the difference in the final dishes. The story of these ingredients and the people who produced them also adds an intangible form of value to the food. Chefs are motivated to source directly even when it is labor-intensive because this work contributes to building up Native food systems.

e. Locating Native Suppliers to Source From

Finding Native producers to source products from can take significant effort.²⁵ Chefs said they often begin with internet searches and draw from lists Native organizations have compiled of Native food producers, such as the Intertribal Agriculture Council's Made/Produced by American Indians Directory²⁶ and the Toasted Sister Podcast's list.²⁷

²³ Zoom Interview with Ben Jacobs and Matt Chandra, Co-owners, Tocabe: An American Indian Eatery (Oct. 19, 2021).

²⁴ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

²⁵ Native chefs will often seek out Native suppliers for specific ingredients they want to source. However, chefs also described meeting producers who offered a product they didn't currently have a use for, and then later on finding or creating a use for that product. Native food producers also reach out to Native-owned restaurants to try to build business relationships.

²⁶ Made/Produced by American Indians Directory, American Indian Foods, www.indianagfoods.org/producers (last visited June 29, 2022).

²⁷ Native-owned Food Companies, Toasted Sister Podcast: Radio about Native American Food, toastedsisterpodcast.com/native-owned-food-companies (last visited June 29, 2022).

Chefs also do targeted internet research to look for producers who aren't on existing lists. While some Native producers have a well-developed web and media presence, others are more difficult to locate. Chefs are using Facebook both to locate Native food producers who have Facebook pages, and to ask their own social networks/followers if they know anyone who produces a specific item they are looking for—one chef said this strategy can quickly yield results.

Native chefs identified word of mouth as another key strategy for locating Native food producers. Being present in the community, networking, and talking to people can all lead to meeting Native food producers or people whose friends or family are food producers. Chefs are also reaching out to their social contacts to locate food producers. Vanessa Casillas, former business manager of Gatherings Cafe, said that the Native non-profit which the restaurant is housed in, the Minneapolis American Indian Center, employs a large group of Native people from all over the US, so when Vanessa asked her colleagues about their social networks, she identified a number of Native food businesses to purchase from. This relational approach to finding producers demonstrates how Native communities can draw upon interpersonal ties to strengthen Native food systems. Overall, it takes time, research, expertise, and community engagement for Native chefs to identify Native food producers to source from.

iv. Navigating Sourcing Decisions

Deciding where and how to source ingredients can be a complex process. The following sections discuss how Native chefs are balancing sourcing trade-offs based on factors such as cost, context, scale, and educational value. Chefs are utilizing tiered systems that prioritize sourcing practices based on Indigenous values, to source ingredients in ways that are beneficial to Native communities, local communities, and the environment.

a. For-profit vs. Non-profit Status

Legal entity status is one variable that can shape Native chefs' sourcing practices. A number of Native-owned restaurants and catering operations are legally structured as non-profits because of their work as community institutions and/or their work with educational programming.²⁸ A non-profit structure can allow Native food operations to spend a larger proportion of their budget on ingredient sourcing, and can open up additional sources of funding (such as grants) for ingredients that are used for educational purposes or provided as a service to their communities. This allows some non-profits to source a larger proportion of ingredients from Native food producers.

b. Managing Budget Constraints: Gatherings Cafe Case Study

Native-produced foods are often expensive, premium products because of the time they take to produce. To balance their budgets with their desire to source from Native producers, many Native chefs will source ingredients from Native and non-Native sources simultaneously. Gatherings Cafe provides an example. In her former role as the cafe's business manager, Vanessa Casillas was responsible for sourcing ingredients for their community outreach programs, and for the cafe itself during periods when it opened. Initially during the pandemic, the cafe provided 200 meals a day, five days a week to Indigenous elders in the Minneapolis area via their elder meal program. At first, the program relied primarily on donated ingredients, supplemented with a few ingredients purchased with a \$500 weekly budget. Later, the cafe received COVID relief funding and grants to support the meal program. This created an opportunity to provide good food to elders and channel money to Indigenous producers. Vanessa explained:

That was my first task being hired on was trying to spend the COVID relief monies, to make it go towards healthy, Indigenous, culturally appropriate foods for our community. [...] Knowing my community here, for working with Native folks then our values should be to feed them clean items, clean as we can afford, and also items that they would appreciate for having the Indigenous values there. Whether it's an Indigenous item, like a smoked turkey leg that comes from a non-Indigenous vendor, or if it's wild rice sourced from a local Native vendor.²⁹

²⁸ At the same time, the majority of for-profit Native-owned food service businesses also engage in educational outreach and work for the social benefit of their communities.

²⁹ Phone Interview with Vanessa Casillas, former Business Manager, Gatherings Cafe (Oct. 19, 2021).

Vanessa emphasizes the value of both Indigenous foods and foods that are produced by Indigenous people. With the support of COVID relief money, Vanessa was able to source ingredients that reflect these values and purchase a larger proportion of items from Native producers. However, once the COVID funding had been used up, they were not able to continue purchasing from some of these suppliers.

Vanessa was also strategic with her budget when sourcing ingredients for the cafe—she put extensive work into costing out the menu to make enough revenue to keep people employed and keep food costs down for community members. Like many Native chefs, Vanessa purchased some items from non-Native sources (such as Co op Partners Warehouse, and Aldi, a supermarket chain) in order to free up budget space to purchase other items from Native producers. Gatherings Cafe also participates in educational programs with limited budgets, where Vanessa employed a similar approach to sourcing:

Other programs would contact the cafe to provide meals or food demos, and want to do family meal kits, but I was limited to about \$15 per grocery bag, for families. So if I want that to be filled up, I didn't have many options. But we did really good things, I was able to do a hodgepodge, like mix it up. The last food demo was stuffed acorn squash. We got the acorn squash by the case from Aldi for very cheap. And then I got the wild rice from Red Lake, but I got their pricier one that was \$6 a pound instead of the \$2.85 variety. And then some greens from Dream of Wild Health because they're local, and they're also a farm that was willing to negotiate on prices. [...] I would shop in person. We tried the larger food purveyors, that was a fail. There's a couple items that they do cheaper, which is the maple syrup [...]. I just had to know my craft by a T. The other items we would get from Aldi, some of the items we couldn't find at Aldi we'd go to the Mexican Mercados, for tomatillos or dried seasonings [...]. And that gave me enough in my budget that we could then still use blue corn flour [...]. And then Cheyenne River Sioux for the bison. [...] So it was kind of a mashup of shopping for the cafe, knowing our menu and where we had wiggle room and where we did not.³⁰

Vanessa subsidized purchasing some items from Native food producers (such as Red Lake, Dream of Wild Health, and Cheyenne River) by purchasing other items from the supermarket or large food purveyors. This is a common approach that Native chefs use to build Native food supply chains while operating within budget constraints. However, this labor-intensive approach to sourcing requires time and effort, and is only possible when businesses have the personnel bandwidth to do this work.

c. Prioritized, Tiered Systems for Sourcing Food

Many Native chefs stated that to make sourcing decisions, they use tiered systems that prioritize sourcing practices based on Indigenous values. These systems consider factors such as whether the food was produced by a Native person or business, the environmental impact of how it was produced, cost, and available quantity; they allow chefs to source with respect for what is most beneficial for the local community, Native Peoples writ large, and the environment, while working within the parameters of budgetary constraints and limited food supplies. Chef Nico Albert, owner of Burning Cedar Indigenous Foods, uses a tiered system to source ingredients for her catering, and to design menus for Native-owned restaurants such as the Kawi Cafe in her work as a consultant. Nico explained:

I definitely do have a scale of order of importance, I'm not sure exactly how to describe it. Basically, my first choice is always to source my food from an Indigenous source, whether that be an individual or tribe or an Indigenous owned business. [...] If there's a local farm around here that is owned by an Indigenous person, I want to support them first, because I want them to succeed. I want to support the people in my direct community. There's not a lot of those, I don't personally know a lot of Indigenous farmers that farm enough to sell wholesale. I know some Indigenous beekeepers, and I call on them for my honey that I buy locally. I know some Indigenous berry farmers that when that seasonally is available, I buy from them. That's just on an individual basis on a really small local scale. And super seasonal. [...] Otherwise I have to branch out, and the next tier up is to buy something that I know is organic. [...]

³⁰ Phone Interview with Vanessa Casillas, former Business Manager, Gatherings Cafe (Oct. 19, 2021).

If I exhaust my research and I can't find a source for something [...] like, say I couldn't find an Indigenous pecan farmer, like I don't know anyone Native who has a pecan grove that grows enough for me to buy from. But I do know a local family owned pecan farm. I'll buy my pecans from them. For the Kawi Cafe, I buy my pecans from an Oklahoma family run farm. That's my next best option. [...] When I do large scale stuff or stuff for the Kawi Cafe, I'm limited because I have to buy from a source that's going to be able to keep up with the ordering capacity. And in that way, I have to size up the scale of the business that I buy from. [...] So in that instance I have to branch out and say, well is there an organic local farm that at least is regional, so I know that I'm not contributing to greenhouse gas emissions from the shipping of the produce, if I try and buy as locally as I can, it at least is more ethical that way. And organically grown so that we're not putting pesticides into the earth, and I know that their farming practices might be at least a little bit better for the ground and for the water. That's the next best thing. For my catering I don't buy anything that's not organic. I don't buy anything GMO, I don't buy anything that's factory farmed, I just don't. [...] For the cafe I don't have as much of a leeway because it is a business still and food cost is an issue for them. [...] So I at least try and buy the organic option from US foods. Or the more natural option that doesn't have growth hormones mixed in. There's a scale there of decisions to be made, and we just try to make the best decision possible that still fits in with our budgetary restraints.³¹

Nico's first choice is to source from a Native food producer, preferably a locally based one. Vanessa Casillas also stated that her preference was to source from local Indigenous vendors when possible. Vanessa explained, "Because I am in this area in Minnesota, it also became very clear after I started asking people that it would be more ethical to use tribes from Minnesota to source what I could. To keep that money local here, within the tribes here. And so I followed that direction."³² Vanessa highlights the ethical importance of supporting Indigenous producers who have connections to the local lands, place, and community first. Multiple chefs concurred that they prefer to source first from a local Native food producer, followed by Native food producers located anywhere. Then, as Nico explained, the next best option is to source an organic item from a local producer, to minimize the environmental impacts of food production and transportation. Numerous other chefs agreed, for example, Ben Jacobs and Matt Chandra, co-owners of Tocabe: An American Indian Eatery, shared that their motto for sourcing ingredients is "Native first, Local Second".³³ When there is not a local option available, or the cost is too great, Nico will source an organic item from a larger supplier, or lastly, a more natural item. In general, the chefs who participated in this research prefer to source from local Native suppliers first, followed by Native suppliers nationally, then non-Native local suppliers, and then any organic or sustainable supplier, with non-Native corporately owned conventional farms being a last resort. This order of priorities has also been described by Native chefs outside of the context of this research. In a presentation at the Fifth Annual Conference on Native American Nutrition, chef Sean Sherman described the sourcing practices of Owmani and NATIFS, saying "For us, we prioritize purchasing from Indigenous producers locally, then nationally, then we support BIPOC local, then we support just our local allies, and then we're buying organics at the bottom of that very list."³⁴

These preferences were also reflected in survey data. 20 respondents answered a question asking them to select the top three factors they consider when sourcing ingredients. 80% selected "Produced by a Native food producer", 70% selected "Organic or sustainably produced", 55% selected "Adequate quantity available", and 35% selected "Produced by a local food producer". "Flavor" and "Easily accessible" were each selected by 20% of respondents, and 10% of respondents selected "Low price" and "Other". This data reflects the high priority Native food systems participants place on sourcing from Native producers and sustainability, and the lower priority they place on easy accessibility and low price.

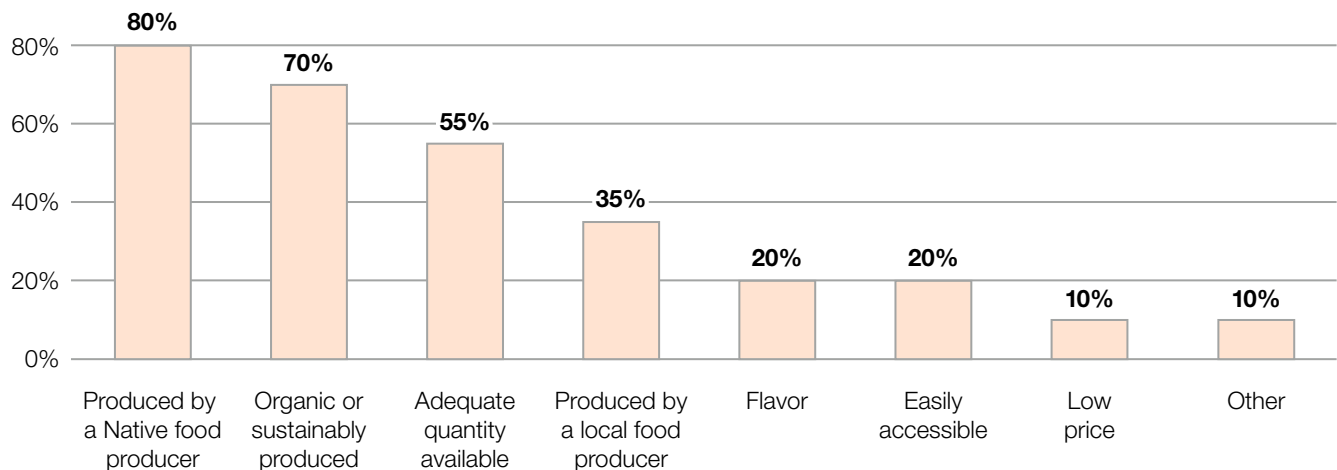
³¹ Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).

³² Phone Interview with Vanessa Casillas, former Business Manager, Gatherings Cafe (Oct. 19, 2021).

³³ Zoom Interview with Ben Jacobs and Matt Chandra, Co-owners, Tocabe: An American Indian Eatery (Oct. 19, 2021).

³⁴ Conference Videos, Native American Nutrition, <https://nativenutrition.umn.edu/2022-conference-videos> (last visited July 29, 2022).

Factors Native Entrepreneurs Consider when Sourcing Ingredients



Importantly, food producers' actual growing practices are what matter to Native chefs, rather than certifications. Chefs explained that they want to source from people who are harvesting in sustainable and ethical ways, or using organic growing practices. As a chef who runs a community outreach catering program put it, "People know that we're going to have wild foods, and that it's going to be sourced as responsibly as possible, but it's going to be wild and foraged and thereby it's not all going to be certified. That's what they come for. The organic certification label is not the top priority for me. Organic practice, or sustainable practice, or traditional practice is much more important."³⁵ This chef looks at the actual environmental impact of food production practices; certification is not a priority.

d. Scale and Special Ingredients

Chefs are responding to the limited supply of certain Native-produced ingredients by featuring scarce ingredients in special applications within their cooking, or using them for smaller volume special events where they don't need a consistent supply. Ray Naranjo, the former executive chef at Indian Pueblo Kitchen, explained, "Because our volume's so high, it's really hard to do business with anybody that's below a certain size. But for special events like our Indigenous wine dinners or the Pante Project for example, I source a lot of that stuff from local farmer's markets. Because there's farmers, Indigenous and non-Indigenous, that are growing our old foods that we used to eat."³⁶ Nico Albert also strategically features ingredients that are only feasible to purchase in a smaller supply. Nico explained:

On Kawi Cafe's menu I have some wild blueberry corn griddle cakes. [...] The syrup that comes with those pancakes is from the Passamaquoddy Tribe, in Maine. [...] Now, we have a couple different dishes that use maple syrup as an ingredient. Our brine that we brine our turkey with uses a cup of maple syrup and a cup of salt water and sage and rosehips. [...] [For] the maple syrup, I buy jugs of organic maple syrup. It's still organic, it's still pretty expensive, but it's far less expensive than the tribal source. Because for something like a brine that's made in big gallon batches, it would be really cost prohibitive for them to use the Passamaquoddy tribal maple in that recipe. [...] So we make the choice that the syrup that you have poured on your pancakes that you're tasting the syrup raw, on its own, we use the Passamaquoddy, the good special syrup for that. So that we can tell people "the syrup you're pouring on your pancakes was made by an Indigenous person". That's great. Now the syrup in the marinade, it's not. Someday it will be, because as the tribal business grows, they'll be able to move into offering things wholesale, and I'll be able to buy the gallon size jugs of syrup, and they'll be able to use that in recipes because it'll be more affordable. So that's like a goal.³⁷

³⁵ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

³⁶ Phone Interview with Ray Naranjo, former Executive Chef, Indian Pueblo Kitchen (Sep. 21, 2021).

³⁷ Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).

Chef Nico Albert's Cherokee Tan Pumpkin stuffed with wild rice, red corn hominy, pinto beans, and wild onions, garnished with dandelion. Photo courtesy of Nico Albert, owner of Burning Cedar Indigenous Foods.



Nico chose to utilize the Native-produced maple syrup in an application where customers taste it directly; this highlights it as a special ingredient and increases the visibility of Native food producers for people who visit the cafe. Similarly, Nico sources ingredients differently when she caters smaller scale events:

I have a dinner coming up next weekend where it's a group of 8 people. [...] I'll do some storytelling [...] and I'll make dinner, and all of the ingredients will be sourced from, it'll be hominy that was grown in my Osage friend's garden, and I buy that corn from her and I make hominy from scratch. And the greens are going to be stuff that I foraged myself. The spices. I'll use sumac that I foraged myself on Turkey Mountain, I processed it myself, and that's what I use to season the meat. That's a level that I can provide people that are paying \$50 a plate for the meal. Because I have to take the time to go forage, and I get a very small amount, I forage enough just for me to sell and use for my home use and for my family and community. Part of our Indigenous way is that we only take what we need, right? And I can't go out there and forage enough to supply the restaurant with because that would be irresponsible of me for my natural source, I don't want to deplete and pick every last sumac berry on the mountain because then it won't come back next year. So we only take half when we're foraging [...]. Never take the first plant that you find, you always move on and make sure that there's going to be plenty for the birds to eat that sumac, and the deer who forage on it, we've got to think of everybody. That's our Indigenous way of knowing how to work with the land.³⁸

Nico features special ingredients at smaller events within her community, and she emphasizes Indigenous values and responsible, relational harvest ethics when sourcing these ingredients. For smaller scale, higher budget events, Native chefs are able to feature more Native and locally sourced ingredients, and the stories of these ingredients add significance and value to the food they create.

³⁸ Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).

e. Native Foods, Non-Native Sources: The Cultural and Educational Value of Ingredients

Native food service businesses are educating members of the non-Native public about Native cuisine, and engaging in food-centered educational outreach within Native communities. Chefs explained that the cultural and educational value of an ingredient can outweigh other sourcing considerations—when necessary, they will turn to less desirable suppliers to showcase these foods for educational purposes. A chef with a catering business in Alaska explained, “The more opportunity I have to share the Indigenous elements of my life within the food and the menu I put forth, I love it. I have—and albeit, it comes from Costco—but it’s bison, that I get into the menu, whether it be in meatballs or meatloaf or tacos.”³⁹ In this example, the educational and cultural significance of featuring Bison as an Indigenous food that this chef has a relationship with outweigh having to source the ingredient from a non-Native supplier. Building on the sumac example above, Nico Albert explained how she sources differently based on scale:

For the restaurant I have to buy the sumac from a larger source, like Amazon. [...] Because they marinate different things, it’s an ingredient in all kinds of different sauces and stuff. To be able to still feature that ingredient, and educate people on the menu about the uses of sumac, I think that has value, and we make up for the fact that we have to buy it from another source. Because at this point I think it’s valuable for people to learn about an ingredient like sumac, that they might not have known to use before. [...] On my small scale, for the little dinners that I do, I can forage that. [...] On the bigger scale, if I personally book a catering that’s like 200 people want sumac-crusting trout, I’m going to use the sumac that I buy online. [...] Maybe I’ll mix a little of the wild foraged sumac in with it, but honestly the flavor is going to be there, the color is going to be there, the story is going to be there for people to experience Native food and understand. To be able to have that experience for 200 people is really valuable, and I don’t have to use every sumac berry on Turkey Mountain to do it.⁴⁰

Chef’s sourcing choices are highly contextual—while hand harvested sumac is appropriate for a small, intimate catering event, it is not appropriate for a large event or for use on a restaurant scale. In some situations, Native chefs must weigh the educational value of an ingredient against its provenance; when Native chefs choose to source Indigenous foods from non-Indigenous vendors, this highlights the value of the food itself.

f. Proportions of Native Sourcing

One way to quantify the proportion of Native-produced food used in Native-owned restaurants is to look at the sheer number of ingredients, or SKUs, that a restaurant brings into their pantry. Tocabe: An American Indian Eatery provides an example. Of the total items that co-owners Ben Jacobs and Matt Chandra source, a fairly small number come from Native suppliers, because they use a wide variety of ingredients, some in very small quantities. However, a large proportion of the total volume of ingredients that Tocabe uses comes from Native food producers—Ben and Matt source most of their high volume items from Native suppliers, such as their bison, pinto beans, and wild rice. Similarly, a large proportion of the money Ben and Matt spend on ingredients goes to purchases from Native suppliers. Other restaurants shared similar trends, for example Indian Pueblo Kitchen sources all of their beef, the highest volume protein on their menu, from Native producers, and Watecha Bowl buys all of their meat from Native sources, including from owner Lawrence West’s own tribe. One exception to this trend is flour, which is a high volume item for some Native-owned restaurants, particularly those that serve fry bread. Several chefs said they can’t find a producer who can provide flour in high enough volumes to meet their needs.⁴¹ When they are able to, Native chefs strategically source their highest volume items from Native suppliers, this directs a larger proportion of their food costs towards Native producers.

³⁹ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

⁴⁰ Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).

⁴¹ Chefs also said they need consistency and a specific protein and gluten content in their flour to make fry bread. Some of these chefs do use artisanal flours for special events, and one chef uses a Native source for flour for her catering business.

Multiple chefs said that they are working to increase their levels of Indigenous sourcing over time. For example, Ray Naranjo was working to switch Indian Pueblo Kitchen to using a Native-roasted coffee. And Nico Albert shared her forward-looking approach to sourcing for the Kawi Cafe, saying “We have practices in place where I have different versions of the order list that have more and more Indigenous sources lined up. Where it’s like, ok, I know that right now you guys can’t buy everything from Indigenous sources, but I want you to work toward that. It’s a goal that we’re on a trajectory towards.”⁴² Building Native food supply chains is a part of Native chefs’ long term goals.

B. FARMING AND HARVESTING BUSINESSES

This section covers the crops that Native farmers and harvesters are producing, the importance of seeds as the foundation of farmers’ supply chains, and farming/harvesting businesses’ customers.

i. Diversified Operations and Varied Crops

Native farmers and harvesters’ operations vary in size, for example, the two smallest farms that participated in our interviews/focus group are 2 and 6 acres (owned by Native individuals) and the three largest are 9,000, 24,000, and 78,000 acres (all tribally-owned). Native farms of all sizes are typically diversified operations with many plant and animal species, though some farms focus on a smaller number of crops. Research participants, including 21 survey respondents who farm and 12 who harvest, reported producing a staggering variety of vegetables, fruits, beans/legumes, and grains; producing alfalfa/hay; and raising various livestock. Harvesters are collecting wild plants, fruits, mushrooms, saps for syrup, and wild game. Cultivating and harvesting ancestral crops and traditional foods is important for some farmers; in some cases farmers subsidize their traditional food programs by growing additional “money maker” crops such as hay, cotton, or feed grain. Some Native farmers sell their food primarily as raw ingredients, while others create value-added products.

⁴² Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).



Pigs with piglets at Birds N Things Farm. Photo courtesy of Daisy Perez-Defoe and Rusty Defoe, owners of Birds N Things Farm.

Examples from specific farms illustrate the diverse foods that Native people are producing. At Yawelyahsi•yó• Farm, Lucas Humblet and his partner cultivate 2 acres and grow more than 100 different vegetables, including varieties of corn, beans, squash, lettuce, snap peas, tomatoes, cucumbers, melons, summer squash, fresh herbs, and more. At Birds N Things Farm, Daisy Perez-Defoe and Rusty Defoe raise pigs, lambs, chickens, and ducks. They also harvest wild rice, maple syrup, and birch syrup, and hope to start growing peppers, tomatoes, and herbs in the future. The Gila River Indian Community's Gila River Farms cultivate 9000 acres consisting of orchard trees (ruby red grapefruits, minneolas, tangelos, and oranges), cotton, wheat, barley, alfalfa, and Sudan grass. They produce hay, and are currently the biggest olive grower in Arizona, with 290,000 olive trees that they use to produce olive oil. At Sakari Farms, Spring Alaska Schreiner creates shelf-stable value-added products with the tribal foods she grows, including hot sauces, teas, dried herbs, seasoning salts, and skincare items. The Cedar Band of Paiutes' Twisted Cedar Wines produces sustainably grown wine designed to pair with Indigenous foods like smoked salmon, elk, and bison. Overall, Native farmers and harvesters produce a wide variety of foods.

ii. Farming Inputs–Native Supply Chains Begin with Native Seeds

Native farmers must source inputs such as seeds, soil amendments, fertilizers, animal feed, and ingredients for value-added products. Arguably, the most central input for any farmer who cultivates plants is seeds. For a Native food supply chain to be Native from start to finish, it must begin with Native-grown seeds, which are often (but not always) Indigenous and ancestral seeds. Native farmers who are also seed keepers emphasize that seeds are not just the foundation of Native food systems—they are living beings who farmers have ongoing relationships with. Lucas Humblet of Yawelyahsi•yó• Farm explained how he approaches this relationship:

I guess for me that's what it's about is having that relationship with the seeds, because that's how I can feel whole as a human, as a spiritual being, knowing that my ancestors held those same seeds and cared for those same seeds. They had that love in their heart to carry these seeds with them as they were being relocated from their homelands, they carried those same seeds with them and continued to grow them. For me that's a big reason why I want to be a seed keeper is that connection with my ancestors that I never met. [...] It needs to be about maintaining that relationship with that corn. Because that corn's a living being and has its own spirit. That's what it's about to me is maintaining that relationship with that corn and honoring my ancestors who cared for that corn.⁴³

Lucas shared that starting a farm was a way to fulfill his responsibilities as a seed keeper, saying "We started the farm out of a necessity for our seeds also, that we wanted to honor that relationship. Seeds want to be grown out, they don't want to be kept in a jar and just looked at. They want to be grown out and eaten and shared and things like that."⁴⁴ The seeds Lucas uses on the farm are from his and his partner's own bundles. In this way, the specific ancestral seeds people have relationships with, and the seeds which have been shared with them, can be a central part of choosing which crops to grow.

Because seeds are living beings, some Native seed keepers prefer not to sell them, as some consider selling their relatives to be an inappropriate relationship. Many times, seeds are shared through exchanges instead. Other seed keepers may choose to sell seeds for various reasons. Ensuring that Native seeds are protected and are only shared in appropriate ways based on seed keepers' and tribes' self-determined protocols is essential to cultivating Native supply chains. It is crucial to ensure that seeds sold as food, for example whole corn or beans, are not utilized as seeds without the grower's consent. Finally, rematriation of seeds is essential. Sourcing seeds may not necessarily involve the exchange of money, but expanding opportunities to share seeds based on Indigenous protocols is vital to strengthening Native food systems and supporting more Native farmers to have relationships with Native seeds.

⁴³ Phone Interview with Lucas Humblet, Co-owner, Yawelyahsi•yó• Farm (Oct. 21, 2021).

⁴⁴ Phone Interview with Lucas Humblet, Co-owner, Yawelyahsi•yó• Farm (Oct. 21, 2021).

Not all Native farms utilize ancestral or Native-grown seeds. This depends on the crops they grow, available seed sources, and the cost of seeds. Gila River Farms buys their seed from a nearby non-Native supplier due to the existing good relationship and affordable cost. Stephanie Saucedo-Manuel, the farm's general manager, has done research to see if she could source cotton seed or fertilizer from Native-owned companies, but she wasn't able to find anyone providing those. She explained, "I researched that about three years ago, and even with fertilizer to see if we could keep our money within Native communities, because I'm all about Native communities and supporting each other. And I didn't find any companies that sold seed or even fertilizer."⁴⁵ Similarly, Daisy Perez-Defoe and Rusty Defoe buy their feed and supplies from local, non-Native owned stores, because there aren't any Native suppliers in their area. However, some Native farmers are sourcing ingredients for their value-added products from other Native food producers and businesses, and some farms are featuring products from other Native producers in their on-farm stores. Overall, Native farmers are constrained by available options for sourcing inputs. There is room for growth in this area of Native supply chains, and there may be opportunities for Native-owned companies to step into providing inputs for Native food producers, including seeds, animal feed, and soil amendments.

iii. Customers

Many Native food producers have a strong desire to sell to Native markets, but are not able to establish enough Native markets to sell all of their products (though selling to entirely Native markets is not a goal for every producer). In response, many producers will sell to any reliable markets, while simultaneously working to build up their Native markets. Native producers' primary market channels are local, in person direct to consumer sales; national online direct to consumer sales; and local, national, and global wholesale sales. Most businesses simultaneously sell to multiple markets.

a. Local Markets

Some Native farms primarily sell their products locally. For example, Birds N Things Farm sells their food primarily through direct to consumer (DTC) sales, and to one local high-end restaurant. Their DTC sales are primarily to non-Native customers (both tourists and local residents); they are offering flexible pricing to try to reach more Native customers. Other Native farms primarily provide food to local Native consumers. For example, a tribally-owned community farm in Arizona distributes food to their tribal members, tribal schools, and their casino, and operates a mobile farmers market on their reservation using a refrigerated vehicle. As they increase production they hope to sell to other tribes. And a Native-owned egg cooperative primarily sells to their tribe's casino and convenience stores, and are working to become a USDA provider through FDPIR's 638 program to reach more Native consumers. Overall, farmers' local markets include both Native and non-Native customers.

b. National and Global Markets

Native producers are reaching Native customers nationally through DTC online sales, wholesale sales to Native entities, and inter-tribal trade. Most farms that sell to Native customers nationwide simultaneously sell to national non-Native markets. For example, a tribally-owned farm in New Mexico who are "local, national, and international shippers, producers, and processors" sell to non-Native customers, while also building business relationships with tribes across the US.⁴⁶ A tribally-owned farm in California sells their products to other tribes who resell their products, to independent specialty food stores, and to Whole Foods and Nugget markets in Seattle, Portland, San Francisco, Denver, Phoenix, and Southern California. Gila River Farms sell their olive oil almost entirely to Native customers, both within their community in their casino's retail stores, to tribes in their region, and nationally to 23 tribes they met at the Reservation Economic Summit. They sell their hay globally; in previous years it has reached China, Afghanistan, and Vietnam, though during the pandemic their buyers weren't able to send their products overseas. They sell alfalfa to multiple tribes up north. They sell their citrus fruit to a different professional buyer each year; these buyers harvest and purchase the entire crop at once, and determine the end markets for the fruit. For example, they sell their lemons to a company in Arizona, who then ships them to Asia. They are working to build relationships with other tribes to sell the citrus, and to get it into Gila River's casinos and gas stations on the reservation.

⁴⁵ Zoom Interview with Stephanie Saucedo-Manuel, General Manager, Gila River Farms (Oct. 28, 2021).

⁴⁶ Zoom Focus Group Interview with anonymous (Feb. 3rd, 2022).

Accessing non-Native markets can support the scaling and growth of a business, for example, Twisted Cedar Wines initially wanted to sell entirely to Native businesses, with tribally-owned casinos being a target market. When non-Native customers approached them, they decided to open up sales to the general consumer. Now they estimate that less than 20% of their products are sold to Native businesses (such as casinos, the National Museum of the American Indian, and Owamni),⁴⁷ and they also sell to Whole Foods, Walmart, the State of Utah, the Army Air Force Exchange, and Yellowstone. Overall, Native farmers' and harvesters' markets encompass Native and non-Native people, businesses, and institutions, on the local, national, and global levels. Most enterprises sell to multiple markets, and many are working to increase their proportion of Native customers.

C. FISH AND SEAFOOD BUSINESSES

This section covers the structure of fish and seafood supply chains, fish and seafood businesses' work to ensure equitable pay for fishermen, their sourcing practices, and their customers. The businesses that participated in our interviews/focus group are located in the Pacific Northwest, Alaska, and the Great Lakes region, and are harvesting fish, geoduck, and oysters.

i. The Structure of Native Fish and Seafood Supply Chains

a. The Cold Chain in Fish Supply Chains

Fish and seafood are highly perishable, so fish supply chains must maintain stringent cold chain practices in order to ensure good quality and flavor, obtain high prices, and comply with food safety regulations. This can include developing HACCP plans, encouraging fishermen to ice their fish, and implementing traceability and quality control systems. Entities that transport fish must have equipment to quickly move large quantities to the processing location. The cold chain also shapes fish and seafood businesses' markets.⁴⁸ As Brigette McConville of Salmon King Fisheries explained, "The marketing is a really important point for any type of business, but for fish businesses it's extra important because it's such a perishable product that you have to work now and move now or put away now, that way you have a quality product."⁴⁹ Fresh fish must be moved quickly to the customer, and smoked, canned, or frozen fish must be processed quickly. This impacts a business's market choices, and complicates entering new markets—fishers who sell fresh fish need to have ready buyers lined up in advance. To quickly sell large amounts of fish, some businesses will sell their surplus wholesale to other processors. In some cases, the time sensitivity of fish products can curtail the creation of new customer relationships.

b. Case Study: Coast Salish Seafood

Coast Salish Seafood provides one example of a fish supply chain's structure, and illustrates the importance of businesses in the middle of these chains. Owner Rudy Madrigal sources fish entirely from Native fishermen, mostly members of his own tribe. Rudy is backed by a larger fish company, Quinault Pride Seafood, which is owned by the Quinault Indian Nation. Quinault Pride provides the money that Rudy uses to purchase fish; Rudy then sells the fish to Quinault Pride. Quinault Pride owns two full line processing plants, but in this situation they are a broker—they pay a fee to utilize a large independent packing corporation's (IPC) processing plant.

⁴⁷ However, representatives of Twisted Cedar stated that this is difficult to gauge because some numbers are obscured when selling to a state-run liquor system who later sells to Native businesses (for example, they sell to the Liquor Control Board of Ontario).

⁴⁸ For example, a survey respondent explained how food safety regulations and infrastructure shape market access, saying "We manage fisheries harvest for the tribe. Individuals are giving licenses and quotas. They are in charge of managing the sales and marketing of their products but nearly all goes to non-tribal wholesale purchasers who then resale the product to processors of markets. This is largely due to the constraints of the shellfish food handling laws and the resources individual harvesters have access to (processing facility requirements and paperwork)."

⁴⁹ Zoom Focus Group Interview with Brigette McConville, Owner, Salmon King Fisheries (Jan. 27, 2022).

Rudy buys fish directly from fishermen, straight off their boats, and uses his fish totes, trucks, and forklifts to transport the fish to the IPC's plant within 8 hours of it being caught. They process the fish to Quinault's specifications, and ship it to Quinault's customers nationally and internationally. The #1 grade fish is shipped to grocery stores across the US within 24 hours, and the #2 grade fish is smoked, canned, or shipped fresh to European markets.⁵⁰ Quinault Pride's customers are the primary destination for the fish Coast Salish Seafood purchases. However, Quinault allows Rudy to sell to his own people first; he sells about 10-12% of the fish locally to members of his own tribe, who use the fish for ceremonies, funerals, burnings, and more. Quinault purchases 100% of the remaining fish. Rudy also sells to several tribes who receive grant money for food commodities. Rudy buys this fish back from Quinault as a finished product, and then sells it to these tribes.

Rudy sources entirely from Native fishers, and his direct customers are all Native businesses and Native people. Yet although the primary downstream entity in Rudy's supply chain is a tribally-owned enterprise, the eventual end market for this fish is primarily not Native businesses or individuals. Instead, the fish that passes through Coast Salish Seafood reaches national and global markets. Rudy wants to sell more fish to Native customers, and would like to sell the majority of the fish he purchases to members of his tribe and his tribe's casinos. However, to supply fish to casinos himself, Rudy would need to line up a committed customer, acquire capital to make a large purchase up front, and pay the IPC to process the fish. Alternatively, Rudy could stockpile smaller quantities of frozen fish until he has enough to begin selling to a casino; he had been taking this approach prior to the pandemic.

c. Case Study: Naknek Family Fisheries

Naknek Family Fisheries illustrates two other structures entities in the middle of fish supply chains can take. Owner Izetta Thompson and her family built their own small scale processing plant, which employed 14 people. Izetta purchased fish almost entirely from Native fishers, including members of her family. They processed their own fish, and did custom processing for other companies. They sold fish primarily to local non-Native entities such as a national park and a marine conservation non-profit.

After 10 years, Izetta closed the processing plant, stopped traveling to Alaska for the fishing season, and began operating solely as a fish marketing business.⁵¹ This simplified the business's logistics. Izetta buys fish from two fishers she sourced from previously, who have opened their own processing plants (one is Native-owned and the other is not). Izetta has small air carriers fly the product to Anchorage or to Seattle. Then Commodity Forwarders, a large logistics company, picks up, stores, and distributes the product to Izetta's customers in Alaska, and to a location in Tucson, where Izetta lives. In Tucson Izetta sells and delivers the fish to a local restaurant, to a rancher who sells her fish alongside his meat at a local farmers market, and to individuals in the Tucson area.⁵² The fish marketing iteration of Naknek Family Fisheries demonstrates how businesses in the middle of fish supply chains create links to bring fish products to national markets. The decisions marketers make shape the end markets for Native fish. Izetta's supply chain shows how outside logistics companies sometimes transport food on behalf of Native-owned businesses. Overall, entities like Coast Salish Seafoods and Naknek Family Fisheries provide essential supply chain logistics and infrastructure to bring Native-caught fish to market, and play an important role in building Native food supply chains.

ii. Equitable Pay as a Motivation to Start Fishing Businesses

A number of Native business owners started their fisheries specifically to establish equitable markets and seek fair prices for fishermen in their tribes. Both Izetta and Rudy opened their businesses because fishermen weren't being treated well by existing buyers, who would dictate low prices which fishers had no choice but to accept. Rudy wanted to find a better avenue for fishers' products and fight for higher prices. He explained:

⁵⁰ Since 2005 another seafood company, Pacific Harvest Seafoods, has been the exclusive sales agent for Quinault Pride, and in 2019 Quinault Pride bought an ownership stake in Pacific Harvest. They are now partners and Pacific Harvest continues to be Quinault's exclusive sales agent, which means that Pacific Harvest plays a significant role in locating customers and markets for Quinault Pride's products. Both Quinault Pride and Pacific Harvest are large companies that sell significant volumes of fish.

⁵¹ Izetta markets her fish transparently, letting her customers know that she no longer owns her own processing plant, but that this is the best fish coming out of Naknek.

⁵² However, recently for a variety of reasons Izetta has transitioned towards closing the business.

It's something that our people needed, and I've been able to provide a good market, better than what the previous buyers did. They'd always try to come in and say "hey this is what you're stuck with". And now I'm here and giving the fishermen, our people, a fighting chance. That's how my business has really thrived, and people choose to sell to me to keep me around, because it's beneficial for our people.⁵³

Over time Rudy started buying all the salmon caught by members of his tribe, and from four other tribes in the region. To create a good market for this fish, Rudy has become an advocate within the supply chain:

I fight and pull teeth with the people that I send my fish to. I get ready to walk away from my business, because I'm not going to allow them to treat me so that I've got to treat my people that way, because I know what the market is and where it's going. [...] Ever since I stepped out onto the platform, I started out fighting. [...] I'd always try to pay a better price. And then if I'm buying the fish for myself [...] I'll even pay more. So I play as, this is my community, this is my people, and I built this business under the foundation that my kids, my family, and everybody, I wanted us all to be fair, for the rest of our lives.⁵⁴

As a smaller actor within a large supply chain, to shift the prices for fish Rudy must negotiate with the businesses he sells to. Rudy described this process:

Where you're ready to quit. Like, I can't go there and drop the price on my people. [...] Why is the price dropping 25 cents in the middle of the week? For what? I need an answer. You're going to put me on the front lines, and you're going to have me go there and tell them "I'm sorry, the price dropped 25 cents for no reason at all"? For no reason. So I got answers for any time the price had to drop. And when I showed up on the scene, I got the price raised, because the buyers before me, their goal and their mission is always to buy the fish at the cheapest they can. And that's everybody's mission. That should be my mission as a business. But I started this business on the foundation of helping everything as a whole, my own personal crab and fishing boats, my family, and my people. Because I've looked at it that way, and I've ran my business that way, I've had a real good life. And I'm happy, you know, I'm really happy. [...] Yes, the relationship [with the fishermen] is important.⁵⁵

Rudy's emphasis on maintaining good relationships, and his determination to raise the price of fish, clearly demonstrates the social and economic value that Native-owned businesses bring to members of their own tribes and to other Native people. Rudy is not motivated solely by his own profits, rather, he wants to support others' economic prosperity and spread value more equitably throughout the fish supply chain. Izetta opened Naknek Family Fisheries for similar reasons:

As an answer to low fish prices and advocating for renewable natural resources, I started the business to try to improve the price at home. I know it's sort of contrary to say "I started this business to make our supply costs higher!" But at the time my family was all fishing [...] and my intention was that they would contribute, in lieu of capital, they would contribute their fish, and then we would market the fish together.⁵⁶

Prior to opening Naknek Family fisheries, Izetta's family had fished for a large non-Native fish processing company for decades. Izetta explained that when she started the business, canneries in Alaska were engaging in exploitative practices:

⁵³ Phone Interview with Rudy Madrigal, Owner, Coast Salish Seafood (Nov. 10, 2021).

⁵⁴ Phone Interview with Rudy Madrigal, Owner, Coast Salish Seafood (Nov. 10, 2021).

⁵⁵ Phone Interview with Rudy Madrigal, Owner, Coast Salish Seafood (Nov. 10, 2021).

⁵⁶ Phone Interview with Izetta Thompson, Owner, Naknek Family Fisheries (Oct. 7 and 8, 2021).

For me it was really important that my family not get cheated by the canneries. Because they never posted a price pre-season, often if there was a lot of fish they'd slam them at the end of the season with a ridiculously low price, and... I just felt that that was a really poor business practice, and you don't really see that anywhere in the world. And in my neck of the woods with the remote area and a lot of people being Indigenous, it a lot of times was like modern day slavery. Because people would get in with the canneries, they'd take out loans from the canneries to buy a boat or buy their nets or whatever, and then they were indebted to the cannery for years and years and years. And they weren't allowed to sell to anybody else.⁵⁷

To create an alternative to these exploitative practices, Izetta posted Naknek Family Fisheries' prices at the beginning of the season, to assure fishermen that they would be paid equitably. This created a shift within the Alaskan fish market. Izetta explained:

We'd always announce the price ahead of time, so just the business practices alone made us more fishermen friendly, so they came to rely on us, they came to appreciate our place in the market. Even though we were so small, it was the optics of it, the fact that we would post a price. So that kind of changed the game a little bit. Now Copper River produces in my hometown, and they post their price every spring now. Not to say that we forced a change, but yeah, we forced a change.⁵⁸

This highlights how Native-owned businesses, even small ones, can drive the markets for Native-produced foods, empower people at the beginning of the supply chain, and create more balanced markets, based on an Indigenous economic lens which values mutually beneficial business relationships. Furthermore, Indigenous fish companies can transfer portions of the value chain away from non-Native companies and into Indigenous hands; this allows Native businesses to capture the value added during fish processing and channel it into Indigenous economies.

iii. Sourcing, Beginning and Middle of Supply Chain

All of the Native fish and seafood enterprises that participated in our interviews/focus group source almost ubiquitously from individual Native fishers.⁵⁹ These enterprises play an important role in bringing fishers' products to market: they provide capital to pay fishermen for their products, they transport these products quickly to processors, and sometimes they process them, create value-added products, or market the products. Some businesses distribute these products; others work with outside distributors or business partners. As a general trend Native fish supply chains involve more Native entities at the sourcing end of the chain, and non-Native businesses are increasingly introduced towards the end of the chain, either as processors, distributors, or end markets.

iv. Customers

a. Case Study: Brigette McConville and Salmon King Fisheries

Brigette McConville's Salmon King Fisheries provides an example of how small, vertically integrated fisheries can reach more varied markets compared to fisheries that sell wholesale to other processors. Brigette started her business 11 years ago. Brigette's husband and their crew catch the fish, and Brigette filets and processes every #1 fish herself.⁶⁰ They sell their products via many avenues: at their retail store, over the internet, direct to consumers (DTC) in local neighborhoods, to restaurants, to local universities' kitchens, to tribally-owned casinos in the southwest, and to groups in Korea and Guam. They provide weekly food boxes for the homeless population on Warm Springs, and have worked on food boxes with the Wave Foundation. They cater weddings, office parties, and picnics, and provide sensory, food-based cultural education.

⁵⁷ Phone Interview with Izetta Thompson, Owner, Naknek Family Fisheries (Oct. 7 and 8, 2021).

⁵⁸ Phone Interview with Izetta Thompson, Owner, Naknek Family Fisheries (Oct. 7 and 8, 2021).

⁵⁹ Native enterprises do purchase some items from tribally-owned businesses, for example one participant sources their oyster seed from another tribal business, and another enterprise carries food products from other tribally-owned companies in their small retail store.

⁶⁰ Last year she processed over 8000 lbs of smoked salmon.



Brigette McConville of Salmon King Fisheries.
Photo courtesy of Brigette McConville, owner of
Salmon King Fisheries.

For example, Salmon King Fisheries hosts educational meals for groups who visit the Confederated Tribes of Warm Springs' museum, in partnership with the American Indian and Alaska Tourism Association. Brigette explained her approach to marketing, saying "I always thought of selling to restaurants as kind of a starting point, because there's much more out there to market to than just a restaurant or a food vendor. You know, there's prisons and colleges and different universities that fish producers can work with. There's a lot out there."⁶¹ Brigette's creativity in finding markets shows in the variety of places that she sells her products, both locally and internationally.

b. Fisheries' Markets

Native fish and seafood enterprises are reaching both Native and non-Native customers. Native-owned fish businesses are selling to individual Native customers, tribes, and Native organizations. Some businesses sell to Native customers through DTC sales at seasonal markets, or via on-reservation retail stores. A tribally-owned fishery in Wisconsin reaches members of eight tribes through food security programs such as the Food Distribution Program on Indian Reservations (FDPIR) and Feeding Wisconsin. This fishery also supplies smoked and fresh fish to Indigenous Food Labs for their culinary training programs with Native chefs. Buck Jones shared that the Columbia River Inter-tribal Fish Commission's (CRITFC) member fishers sell to tribes (including their casinos), and to Native individuals in local communities and at farmers markets. One of CRITFC's member tribes operates a brick and mortar fish market in their community.

Native-owned fish businesses are reaching non-Native customers through local, regional, national, and global markets. CRITFC's fishery sells DTC or "over the bank"; they also sell wholesale to about 10 non-tribal major fish processing companies. The tribally-owned fishery in Wisconsin sells to local restaurants. And the tribally-owned fishery in Washington sells locally via their retail store. Many businesses sell their products wholesale to processors and distributors that reach national markets. For example, during their most recent season the tribally-owned fishery in Wisconsin sold 340,000 lbs of herring wholesale to processing facilities that supply national markets. The tribally-owned fishery in Washington sells their surplus wholesale to other companies, for example, they sell oysters to a main distributor that supplies restaurants. They also sell and ship oysters directly to oyster bars in New York and Washington DC. Finally, Native-owned seafood businesses are selling to global markets.

⁶¹ Zoom Focus Group Interview with Brigette McConville, Owner, Salmon King Fisheries (Jan. 27, 2022).

The tribally-owned fishery in Wisconsin sells to Canadian customers, who purchase year round in contrast to the seasonal market in Wisconsin. Coast Salish Seafood sells to Quinault Pride; this fish reaches European markets. Asian countries are an important market for Native-produced seafood, and Native fisheries sell particularly high volumes to China during the Chinese New Year. The tribally-owned seafood enterprise in Washington stated that 98-99% of their geoduck market is in China, they explained, “We’ll go out and harvest [the geoduck], bring it back to the plant, it’s at the airport and then off to China by 7 pm every day and on the live market there as soon as it gets off the plane.”⁶² Because international markets represent a large portion of many Native seafood businesses’ sales, dynamics affecting international trade can be significant. A representative of the tribally-owned seafood enterprise in Washington described how the trade war during the previous presidential administration impacted their business, saying “That really hurt us when all of those tariffs were implemented. That was probably the worst thing that happened to us, even including the pandemic.”⁶³ Overall, many Native-owned fish and seafood companies sell a portion of their products locally, often to Native customers, and sell the surplus wholesale to other companies that reach national and global markets. The market end of Native fish and seafood supply chains is weak compared to the sourcing end—all of the businesses who participated in our interviews/focus group said they want to sell to more Native customers.

D. RANCHING BUSINESSES

This section covers ranching businesses’ products, input sourcing practices, difficulties accessing meat processing, customers, and how location shapes the supply chain challenges Native ranchers encounter.

i. Products

The individual ranchers who participated in our interviews/focus group produce beef, and the two tribally-owned enterprises have both cattle and bison herds. Several of the ranchers are cow-calf operators, who sell calves to other ranchers for finishing; one operates a retail beef business; and another sells both custom exempt whole and half beef direct to consumer, and USDA processed meat at farmers markets. Some of these ranchers raise grass-fed, grass-finished beef, while others raise grass-fed, grain-finished beef.

⁶² Zoom Focus Group Interview with anonymous (Jan. 27, 2022).

⁶³ Zoom Focus Group Interview with anonymous (Jan. 27, 2022).



The Litson Family, who operate Litson Ranch, starting fourth from the left: Benita Litson, Mr. Bennie Litson, Mrs. Julia Litson, and Dorthea Litson, surrounded by grandchildren of Mr. and Mrs. Bennie and Julia Litson. Photo courtesy of Dorthea Litson, of Litson Ranch.

ii. Supply Chains and Sourcing Inputs

Ranchers must source inputs such as feed (hay or grain), nutritional supplements, fencing, and supplies for pastures such as soil amendments or fertilizer, seeds, and irrigation equipment. Research participants said they have found very few Native businesses who sell ranching inputs. A rancher in South Dakota explained:

I don't have any Native source for inputs that I have. Because there's just nobody dabbling into the business for inputs into livestock. Most of them are barely making it as cattle ranchers, [...] but to branch out into other services, into the cattle industry, that's where we're lacking. We're lacking through the supply chain. [...] So to source with Native-owned businesses, there's not very many, and if there are, they already got their fill. [...] And so I mean, when we talk about Native supply chain, there is none.⁶⁴ Or if there is, it's very very small, and it might be two or three states away. Even inputs as feed, in our area we have a lot of feed supplier chains, but none of them are Native-owned. So that is one thing that needs to happen. We need investors to look at us. [...] When you're stretched thin already trying to be a producer, to try to do that other next step, as [two other focus group participants] said before, is very very hard. And a lot of times our tribes don't see that future ahead, and they're not looking to help.⁶⁵

When ranchers are undercapitalized, it is difficult for them to expand into providing other services such as inputs. Furthermore, in this rancher's experience there is no Native supply chain in his region. Ranchers in California and Arizona described similar dynamics in their locations. A rancher in Arizona explained:

Even getting products for feed and supplements is difficult, because we don't have any Native producers close by. The closest ones to us are [...] a little over an hour away. [...] We most recently made contact with a tribal farmer [...], because I like to buy tribal, and we're purchasing hay from him. And a positive in terms of purchasing hay came from the tribe applying for rain insurance through CKP. Then they distributed some money to each one of the associations on our reservation. [...] So we're able to use that to purchase supplements from that Native farmer that produces hay. Which is a positive. But then transportation becomes an issue because [...] you have to add another 2 or 3 dollars a bale in order to get it to the ranch. So transportation, both in terms of the product of Native beef getting it to the local person, and then transportation in regards to supplements, both are problematic in terms of the Native supply chain. It's virtually non-existent.⁶⁶

This rancher highlights how distance and transportation costs are a barrier to sourcing from Native enterprises, and how additional capital can support building Native supply chains.

iii. Processing

Ranchers in some locations cannot easily access processing infrastructure; this issue was exacerbated by the pandemic. Traveling long distances for processing is common—ranchers in New Mexico and Arizona described driving between 2.5 and 4.5 hours to reach their closest processors, which are off-reservation and not Native-owned. Similarly, chicken/pig farmers in Wisconsin said they drive 2-3 hours to reach processing facilities. These commutes are difficult—the Arizona rancher traverses 11 miles of rough dirt road, and the Wisconsin farmers must travel at 3 a.m. to reach the facility on time and to protect the chickens from heat stroke. Most ranchers said they prefer to process at inspected facilities, as this improves their market access.⁶⁷ However, Native ranchers in South Dakota, Arizona, and on the Navajo Nation (Arizona/New Mexico) stated that there is a shortage of available meat inspectors in their regions. For example, a rancher in Arizona explained:

⁶⁴ This rancher also shared in other comments that there is no Native supply chain in his area in terms of processing or selling to Native customers.

⁶⁵ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

⁶⁶ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

⁶⁷ However, one rancher in California sells her meat direct to consumer and primarily processes custom exempt, using butchers in a 3 hour radius.

I believe the inspector, whether it's a state inspector or USDA inspector, is the key for tribal members to ensure that they're able to get their product out. [...] We have a local butcher shop [...] but they don't have the state inspector even come to their facility except for inspections on wild game [...]. So the way we sell our product is the owner has to purchase that animal from us, or the buyer has to purchase portions of that animal if they're not inspected. [...] For us in Arizona, we need more state inspectors availability. [...] There are not enough inspectors, both state and federal inspectors, to meet the tribal need.⁶⁸

Many ranchers already face difficult commutes to reach processing; when there are not enough inspectors at these facilities to meet ranchers' needs, their access to processing and to markets that require inspection is further limited.

Not all of the ranchers who participated in this research have difficulty accessing processing. One rancher in Oklahoma uses a Native-owned processing facility close to her ranch. She explained:

Thankfully, we get to use a Native American owned processing facility. [...] We're just really thankful we've got one that's just literally like a mile from our ranch, and they've kind of just taken off. They've expanded, their employment has expanded. We're in a very densely populated Native American area, and so it's dominoed from there. We've gotten to employ more Native Americans on our ranch, and then the processing facility in turn has also employed more Native Americans out of the community.⁶⁹

Nearby processing access is impactful—this facility strengthens Native food supply chains in the region, and creates economic impact through employment. Overall, access to processing varies dramatically across locations; further research is needed to fully map where meat processing infrastructure and meat inspector availability are scarce in Indian Country.

iv. Customers

Native ranchers who participated in our interviews/focus group are selling their products via three main avenues—selling live animals, direct to consumer (DTC) sales, and FDPIR. Some ranchers are reaching Native customers through the latter two avenues. The rancher in Oklahoma is a FDPIR supplier for her tribe, and she spoke about how meaningful it is to her to supply meat to a large group of Native consumers. And Mountain Lake Cattle's owner, Kassandra Dickerson, has well-developed local DTC markets in California, with both non-Native and Native customers (tribes and individuals).

a. Desire to Transition to Direct Marketing

Some Native producers operate primarily in cow-calf, the first stage of the supply chain, because up-front capital costs are low.⁷⁰ Finishing animals requires more capital and equipment, and direct marketing requires processing and cold storage infrastructure.⁷¹ Generally, finished products are worth more, except in some cases where ranchers are competing with the commodity market. As cow-calf operators, Native ranchers receive a smaller proportion of the animal's value, but by transitioning to direct marketing, they can capture the value added at later stages in the supply chain. Direct marketing is also an alternative to competing with the commodity market's inequitable low prices. Finally, it can be easier to work around a lack of inspected meat processing facilities when ranchers have a strong DTC customer base, as these customers are often willing to purchase animals to process custom exempt.

⁶⁸ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

⁶⁹ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

⁷⁰ Ranchers also noted that the low barriers to entry are one reason why many Native ranchers produce grass-fed meat as opposed to grain-finished meat. Utilizing cattle for regenerative grazing is another reason.

⁷¹ Building inventory of stored meat to meet seasonal demand can also be important.

All the cow-calf operators we spoke with (three individuals and one tribally-owned enterprise) are trying to transition to direct marketing, and all agreed that finding customers is a challenge. Their biggest markets are non-Native customers off-reservation, for example at farmers markets. All of the ranchers said they want to build more customer relationships with Native organizations or Native individuals. Ranchers also said it is difficult to access capital to buy the necessary equipment, feed, and supplies to transition markets. When ranchers are able to transition, it can have a positive impact on their business. Cassandra Dickerson shared that switching to direct marketing was “the best decision ever” because it allows her more control over her operation; this enables her to take care of the cattle for their entire lives, use them for ecosystem restoration, and make more revenue.⁷²

v. Location

Location impacts a rancher’s opportunities at each step of the supply chain. For ranchers operating in populous areas, land access is the biggest barrier (as well as feed costs, as hay prices are higher in areas with less agricultural land). Cassandra Dickerson described the dynamics in her region in California:

So [land access] is the most difficult portion of it, for sure. [...] I spend the majority of my time looking for pasture. I lease all of my pastures. [...] There’s not that much land out here anymore, most of it’s going into development, huge developments, California is just trying to boom on these giant single family homes on quarter acre lots, instead of doing low income housing or high density housing. [...]. So finding land is the worst thing, it is the most stressful thing, it is the hardest thing, and it is my biggest restriction. Another one is feed costs. We just had a pretty iffy drought year, [...] we didn’t have water in a few of our pastures so we had to take cattle off of them. Well now those pastures are being put into housing. So I’m like “well, I lost those 600 acres, I lost that 400 acres, I lost that 200 acres”. I can’t pay enough that would deter a landowner from selling to a developer, there’s just no way. They’re buying it for \$800,000 an acre.⁷³

Kassandra moves her cattle between multiple small leased pastures, and has expanded her pasture search to a broader area, increasing her commutes. Many of her leases are month-to-month, which creates uncertainty, instability, and added stress.

⁷² Phone Interview with Cassandra Dickerson, Owner, Mountain Lake Cattle (Oct. 27, 2021).

⁷³ Phone Interview with Cassandra Dickerson, Owner, Mountain Lake Cattle (Oct. 27, 2021).



Moving cattle to another location during the fall weaning season at Litson Ranch. Photo courtesy of Dorthea Litson of Litson Ranch.

In contrast, ranchers who live in rural areas, or whose tribes have large land bases, can often access land more easily. Instead, their biggest barriers are finding customers and accessing processing, transportation, and storage infrastructure. A rancher in South Dakota described the dynamics in his area:

It's just a logistics nightmare to try to get me who's struggling on my end in South Dakota, to the people who really would make change for us, that's mainly in the metropolitan areas or the coasts. So we've got a really big disadvantage of our location. We've got a great advantage, especially up here, we're a large base land tribe, we can produce all the animals that people need, but the logistics for us is just too much.⁷⁴

This rancher emphasized the importance of investment to support rural ranchers to reach markets for their products:

So what do we do to fix it? The biggest thing is financing. [...] Arizona, South Dakota, our biggest metropolitan area that's even close is a state away. So to get to the people that want to hear stories behind where your meat comes from is a little further away for most of us. When you're in an impoverished area, most people want cheap meat. They don't really care that it was humanely done, or it's grass-fed finished, and we're doing things better for the land, we're trying to do the regenerative ag that's going to be sustainable for our reservations and for our people. It's about getting enough. So the one biggest thing is financing. That's going to really help Indian Country.⁷⁵

Ranchers need capital for marketing and storage/transportation equipment if they are to establish customer bases in distant areas. Furthermore, ranchers need their meat to be inspected so they can sell to more possible markets. Overall, ranchers in populous and rural areas encounter converse supply chain challenges.

vi. Osage Nation Case Study

The Osage Nation's meat processing plant, Butcher House Meats, is an example of how tribes invested pandemic relief money into infrastructure to support food sovereignty. During the pandemic, national supply chains failed and grocery store shelves on the Osage Nation were empty, while stores in nearby cities were still receiving food. To address this, the Osage Nation spent \$10 million of CARES act funding to build their own meat processing plant. The plant can process beef, bison, pigs, and deer; they offer custom exempt processing and both state and federal inspection. In addition to processing cattle and bison from the Osage Nation's herds, they provide processing for Osage tribal member ranchers, and for a few non-Native ranchers. The plant operates a retail butcher counter where they sell meat from the Osage Nation's herds. About half of the butcher shop's customers are tribal members. To prioritize feeding the Osage community, tribal members receive a 10% discount, or a 20% discount on meat purchased for tribal events. Meat counter offerings are tailored to tribal members' preferences, based on discussions with Osage cooks about how best to cut, prepare, and spice the meat.

The plant has increased access to affordable meat in the area. Joe Thompson, the former general/plant manager, stated that their prices are low enough to compete with the commodity market. This is possible partly because the plant has minimal transportation costs, as the animals and the plant are located on Osage lands. Joe explained:

We're already pretty reasonably priced, because we have no transportation. If you look at the bigger companies like the Tysons, the Cargills, [Butcher House Meats] has no transportation in our meat because it comes here and when it leaves here it's going right into somebody's car. And I've priced things accordingly to take that part of the supply chain out. And then you take 20% off of that, it's pretty cheap. A lot of times we're a dollar to a dollar and a half per pound under Walmart.⁷⁶

⁷⁴ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

⁷⁵ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

⁷⁶ Zoom Interview with Joe Thompson, former General Manager and Plant Manager, Butcher House Meats (Nov. 16, 2021).

Joe also attributes the plant's low prices to using every part of the animal and processing at a slower rate:

Our goal here has always been to maximize the value of the carcass, so we don't kill as many as we probably could. Because a lot of the bigger plants, their deal is to push volume. I can't compete with those guys on that, but I can compete with them on maximizing what you get off the carcass and what you sell it for, to get as much money out of it as possible. I can actually do better than they can do. So that's one of the things we've been working on is I've been teaching [the staff] how to do that.⁷⁷

The plant provides affordable meat for tribal members; this is significant because many families and elders are on fixed incomes. Although the facility required a significant up front capital investment, this demonstrates that it is possible in some situations to produce meat that competes with the commodity market, and to strengthen food sovereignty by increasing community members' access to affordable food.

The plant has built Osage supply chains locally and across the US by selling meat to Osage-owned restaurants in Pawhuska, Oklahoma, and to Tocabe: An American Indian Eatery, in Denver, Colorado (Ben Jacobs, one of Tocabe's co-owners, is an Osage citizen). The plant is also working towards selling meat to Osage-owned grocery stores. Joe explained "that's the goal, is to try to keep it all inside the tribe and service the tribal members, from families to businesses, whatever [the plant] can do for them."⁷⁸ Joe emphasized tribal leadership's role in the plant's success, saying "We have gotten tremendous support from the tribe, and that makes a big big difference."⁷⁹ Overall, Butcher House Meats has supported Osage ranchers, strengthened Osage supply chains, and created food access for tribal members and others in the region.

⁷⁷ Zoom Interview with Joe Thompson, former General Manager and Plant Manager, Butcher House Meats (Nov. 16, 2021).

⁷⁸ Zoom Interview with Joe Thompson, former General Manager and Plant Manager, Butcher House Meats (Nov. 16, 2021).

⁷⁹ Zoom Interview with Joe Thompson, former General Manager and Plant Manager, Butcher House Meats (Nov. 16, 2021).

TRENDS IN NATIVE FOOD SUPPLY CHAINS

i. The Supply Gap—Tensions between Increasing Supply and Sustainable Production

a. Limited Supply of Native-Produced Foods

The current supply of Native-produced foods is limited, and is not enough to meet the demand for Native-produced and traditional foods across Indian Country. This is a complex issue. In some cases, there is food available, but it is not accessible due to lack of distribution infrastructure or market relationships—there are Native food producers who would like to enter the supply chain but are unable to bring their products to market. Connecting these producers to Native supply chains is one way to increase the available supply of Native-produced food. In other cases, large quantities of Native-produced food are sold to non-Native buyers, often to ensure a stable market. Re-routing some of this food into Native supply chains is another way to address the lack of supply. However, both Native food producers and Native food service workers identified a need to increase the quantity of food being produced by Native suppliers, and to increase the supply of some traditional foods.

Many chefs stated that in their experiences, there are limited supplies of Native-produced foods readily available for food service sourcing, and some Native suppliers cannot consistently provide product at restaurant volumes. For example, Indian Pueblo Kitchen's former executive chef Ray Naranjo shared that he bought out the entire supply of several cornmeal producers:

I started with Tamaya Mill. [...] But they could not keep up with our demand, our volume is so high that we're actually going through about 100 pounds of corn a month. Which is a lot, people aren't used to those kinds of numbers. Just to give them some time to recover, I started sourcing from another place called The Fruit Basket, in Albuquerque, and we bought them out of blue corn, so they actually ran out also. [...] So we're just buying people out. Hopefully we can go back to Tamaya after the harvest and they'll be able to handle us then.⁸⁰

This is a common trend.⁸¹ Valene Hatathlie, owner of Val's Frybread, said she has difficulty sourcing adequate quantities of cornmeal, mutton, and steam corn:

The barrier I run into is a lot of people don't produce in a big quantity that I would like them to. So I'm buying probably 500 gallons of steam corn from this supplier, and then 300 from another supplier and another supplier I'm getting 100. [...] There are a lot of producers making small quantities, but it would be nice if they could all get together and create a business where they could [...] standardize their prices, and sell to people who are buying in big quantities.⁸²

Even Native-owned catering businesses, which in some cases operate at smaller volumes than restaurants, are encountering limited supply. From the producer perspective, some of the Native food producers who participated in this research are producing at larger volumes, while others are operating on a smaller scale. The latter group spoke about having difficulty meeting demand from large volume customers. Overall, there is clear unfulfilled demand for Native food products.

⁸⁰ Phone Interview with Ray Naranjo, former Executive Chef, Indian Pueblo Kitchen (Sep. 21, 2021).

⁸¹ 32 survey respondents answered a question about factors that prevent them from participating in a Native supply chain; of those, 34% said that the products sold by Native businesses aren't available in large enough quantities.

⁸² Zoom Focus Group Interview with Valene Hatathlie, Owner, Val's Frybread (Feb. 28, 2022).

b. The Possibility of Sustainably Increasing Production

A common theme in discussions about increasing the supply of Native-produced foods is that increasing production volume can stand in tension with producing food in accordance with Indigenous values. For example, Chef Nico Albert explained:

There's also an issue of the supply keeping up with the demand. Yes, it would be great if we had better marketing so that more people would be buying from these Indigenous sources, but most of these sources are small operations. So like Passamaquoddy Maple, they sell out every season. [...] For Kawi Cafe we might run out of the Passamaquoddy Maple before they get their next batch in, because they're basing their operations on what the maples can give, because they are in a relationship with those trees. And those people are never going to take more than the trees are willing to give. And they're not going to do what larger corporate organizations do and over-tap their resource in the interest of making more money. So there's always going to be a finite amount of what we can grow, until we have access to the land.⁸³

Chef Ray Naranjo also juxtaposed sustainable production with producing adequate supply:

Some of the farmers would have to be willing to be at that next level, where they're able to supply multiple restaurants. But then when you look at what that growing system looks like, then it becomes more a part of the problem, which is the whole mono-cropping system. That's essentially what you would be forcing on some of these farmers. They'd have to focus on maybe a salad mix or certain types of tomatoes that people want. So it's hard to say that it's positive if they do that big.⁸⁴

Ray emphasizes the trade offs between larger production volume and unsustainable methods of food production. Indigenous food producers have diverse perspectives on this issue. Some producers locate supply constraints in issues such as land access and lack of equipment, and others stated that production can be increased by utilizing Indigenous knowledge of regenerative agriculture, such as practicing carefully managed rotational grazing. Daisy Perez-Defoe and Rusty Defoe, owners of Birds N Things Farm, described how they could sustainably increase production through Indigenous agriculture:

Daisy: It's a very fine line, you're correct. There's always knowing your livestock, and how fast the breed that you have eats and grows. We raise Cornish cross for meat chickens. [...] And we can upscale our supply to include a couple thousand birds, without damaging our land. Because we do chicken tractors, that means every single day we move those tractors twice a day. [...] And we monitor them closely, say they grow faster than what is expected, then we process them faster. [...] Now the pork, we can do that as well with the pigs. Rotational grazing, we move them every couple of weeks, every couple of days, depending on how fast they go through feed, how fast they go through the pasture. You make sure you monitor it closely so you don't damage the land. [...] You can control it up to a point. There's no such thing as you can't control it. It's just that people are used to traditional farming where they just stick pigs into one section of land and then the pigs rut and they destroy the land and then that's that. [...] But if you manage it properly and you have experience with it, and you know you can do it, that's the biggest thing, that some people don't know they can do it. [...]

Rusty: You have to be willing to put in the time. You have to make it into your lifestyle. This is my lifestyle. This is our lifestyle. [...]

Daisy: [...] A lot of restaurants and a lot of consumers have that kind of wariness, like you can't do this sustainably, well yes you can, you just have to work hard at it every single day.⁸⁵

⁸³ Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).

⁸⁴ Phone Interview with Ray Naranjo, former Executive Chef, Indian Pueblo Kitchen (Sep. 21, 2021).

⁸⁵ Phone Interview with Daisy Perez-Defoe and Rusty Defoe, Owners, Birds N Things Farm (Oct. 21, 2021).

Rusty Defoe moving a pig at Birds N Things Farm. Photo courtesy of Daisy Perez-Defoe and Rusty Defoe, owners of Birds N Things Farm.



Electric fencing utilized for rotational grazing at Birds N Things Farm. Photo courtesy of Daisy Perez-Defoe and Rusty Defoe, owners of Birds N Things Farm.



Daisy and Rusty emphasize that it is possible to use Indigenous knowledge to sustainably increase production, but that this process is extremely labor-intensive. While these situations are highly individualized and depend on what people are growing and raising, intensive management is one way to sustainably produce larger quantities of food. However, producers need support to be able to put time into managing their land in this way.

Other Native farmers are encountering limits to sustainable production. Lucas Humblet explained that supplying restaurants is difficult for Yawelyahsi•yó• Farm:

I'm noticing it's the scale of things. For example if we can provide some delicious salad mix, that restaurant might want it but they might want it in fall quantities each and every week. They might want 50 pounds once or twice a week, and that is very challenging for us to hit. We have two acres and we only farm one of those acres each season. [...] We're trying to do it a bit intensively while also being conscious about how extractive we are of the soil and the nutrients within the soil. [...] It's challenging to keep our principles, our values at the forefront while trying to meet the demands of those markets that want higher yields.⁸⁶

Lucas highlights the tension between increasing production and farming in accordance with his values. Lucas mentioned that they could sustainably increase production by utilizing high tunnels, but he would need to write grants to acquire funding to build them. Sustainable production is limited by factors such as the environment, what is being grown, the amount of land, and the equipment the producer has access to.

c. Lack of Infrastructure

The infrastructure and equipment a producer has access to can significantly shape the quantity of food they can produce and/or bring to market. For example, a representative of a tribally-owned seafood enterprise in Washington shared that their tribe has a smaller fleet size; this limits their harvest volume, which is a barrier to selling to other tribally-owned businesses. Daisy and Rusty described how lack of processing and packaging infrastructure limits their market opportunities. They would like to sell to local grocery stores to increase tribal members' access to their products, but these stores will not buy from them. Daisy explained:

⁸⁶ Phone Interview with Lucas Humblet, Co-owner, Yawelyahsi•yó• Farm (Oct. 21, 2021).

Right now we cannot access the grocery stores in Ashland. [...] They won't buy from us because we don't process at the farm, we don't have the quantity that they need, and we don't have the labeling that they need. And all of that is, again, the money issue. We don't have access to grants [...] so that we can easily write down a check for custom labeling or custom UPC codes.⁸⁷

Jen Falck, owner of Kahulahele Farmstead, also shared that she could significantly expand her chicken production, if she had capital for necessary equipment:

[For those who are new to farming] access to capital for infrastructure is a huge barrier. [...] Could I raise 1000 chickens and get them into boxes? I could, if I had capital to buy the equipment to do that. So that's, I think, very difficult for most of us.⁸⁸

Transportation and storage infrastructure also significantly shape the quantities of food Native producers can bring into the supply chain. A rancher in Arizona shared an example:

I had a request from the Indian Agriculture Council for x amount of oxtail. [...] It was almost comical, I mean I thought it was great that they called me because they wanted a Native producer, but we didn't have the supply. There was no way that we could produce that amount of oxtail for them for their conference in that short of time. And once again it becomes a transportation issue and a storage issue as well.⁸⁹

Infrastructure access relates directly to the amount and forms of capital an enterprise has access to. Direct investment into food producers is crucial for providing capital that producers can use to address the particular needs of their operation. Funding infrastructure can also create additional impact because many producers share equipment. For example, Dan Cornelius explained that his production capacity depends on Jen Falck's infrastructure:

I got into chicken production this year largely because I knew that I could go process them at Jen's place. Because she got a small grant from Rodale Institute and has an on-farm chicken processing set up. But now when we're looking at doing 1000 or 5000 birds, unless we can find a processor that's willing to do it, which is exceedingly difficult to do right now, we need to build that processing capacity. Jen said she could do 1000 birds, but where's that capacity? I could easily do 1000, we've got another Oneida producer that could probably do at least that much as well. But we need those processing facilities.⁹⁰

Because producers are sharing equipment, increasing infrastructure access for one producer can also increase capacity for others in their region. Another approach is to build shared regional infrastructure.⁹¹

d. Land and Water Access

The United States government used force, coercion, and attempted genocide to dispossess many Native Peoples of some or all of their lands; despite this, Native Peoples maintain ongoing ties and relationships with their homelands, which constitute the entirety of what is currently known as the United States. Settler colonial structures are the reason Native food producers have difficulty accessing land. Even within the borders of Native reservations and treaty lands, a large number of non-Native food producers utilize and profit off of the lands.

⁸⁷ Phone Interview with Daisy Perez-Defoe and Rusty Defoe, Owners, Birds N Things Farm (Oct. 21, 2021).

⁸⁸ Zoom Focus Group Interview with Jen Falck, Owner, Kahulahele Farmstead (Feb. 3, 2022).

⁸⁹ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

⁹⁰ Zoom Focus Group Interview with Dan Cornelius, former Technical Assistance Specialist for the Great Lakes Region, Intertribal Agriculture Council (Feb. 3, 2022).

⁹¹ Businesses can also consider partnering with more established Native or non-Native businesses that are operating at a larger scale to access their infrastructure. For example, Twisted Cedar Wines partners with a single large non-Native owned wine producer that grows the grapes and makes the wine in consultation with Twisted Cedar. This gives Twisted Cedar access to economies of scale, as the partner is able to purchase bottles, labels, and other supplies in large volumes at low prices; this allows Twisted Cedar to keep the cost of their product down.

This extraction of wealth and food from Native lands is made possible by various actions of the US government. The US government forcibly transferred ownership of some of these lands to non-Native people with the General Allotment Act of 1887 (Dawes Act). Other portions of Native land are difficult to utilize for food production because of fractionated ownership resulting from allotment policies. The Bureau of Indian Affairs (BIA) is responsible for the administration and management of lands held in trust by the United States for Native nations and Peoples, and the BIA leases a large proportion of these lands to non-Native food producers. The Indian Land Tenure Foundation provides resources for understanding the complex array of legal statuses that apply to Native lands, and how these impact land access.⁹²

The wealth extracted from Native lands through non-Native peoples' agricultural operations is significant. The Native Land Information System analyzed this topic. They report:

Since the General Allotment Act of 1887 the United States Government has created a system of agricultural apartheid that has promoted the leasing and/or liquidation of native lands to Non-natives. This has created a massive disparity in how agricultural income derived from native lands is shared. In these charts, we estimate the total agricultural income generated from Native Lands since 1840 and allocate it by race based on data from the 2012 and 2017 census of agriculture for American Indian Reservations. **Based on our analysis using the lost agriculture database, we estimate that between 1840 and 2017 non-natives collected over 760 billion dollars (86%) operating on Native lands. By comparison, we estimate that natives only collected 123 million (14%) on lands held in trust by the federal government, supposedly for the benefit of Native peoples.**⁹³

This disparity is deeply relevant to all conversations about land access for Native food producers. It is essential to correct this inequity and change policies so that Native people can utilize Native lands for food production and food sovereignty.

A number of Native farmers and ranchers stated that limited land and water access are impacting their ability to produce food and to increase their production. For example Cassandra Dickerson, owner of Mountain Lake Cattle in northern California, said that finding land is the most difficult part of her work. Her region is losing large quantities of leasable pasture to development. Cassandra wants to expand her herd size from 120 cow-calf pairs to 400 pairs; her only restriction is accessing land to graze the cattle on. Currently Cassandra utilizes a networking approach to find land to lease:

It's a lot of making, you know, handshakes. I'm friends with a baker, I give her beef and she gives me these little apple pies, and I walk up to a landowner's house and I'm like "Hi, my name is Cassandra, I have cattle. Here's an apple pie. Can I rent your land?" And sometimes they say yes.⁹⁴

This approach has resulted in leases, including one person who allows Cassandra to pasture cows in her front yard. However, these leases are month to month, which makes it difficult for Cassandra to expand her herd. Sakari Farms' owner Spring Alaska Schreiner also cannot find land to expand her operation:

Not everyone has thousands of acres. We have 6. We're getting two more high tunnels this year, and then we're out of space. It's 1.2 million dollars for the neighboring farm that's 6 acres too. So that's very unrealistic for us to take on a neighboring property with small acreage to expand.⁹⁵

Land access can also be an issue for tribally-owned operations, depending on the size of the tribe's land base and the legal status of their lands.

⁹² Indian Land Tenure Foundation, iltf.org (last visited June 29, 2022).

⁹³ *178 Years of Agricultural Revenue on U.S. Native Lands*, Native Land Information System, nativeland.info/blog/dashboard/lost-agriculture-revenue-from-contemporary-united-states-native-lands (last visited June 29, 2022).

⁹⁴ Phone Interview with Cassandra Dickerson, Owner, Mountain Lake Cattle (Oct. 27, 2021).

⁹⁵ Zoom Focus Group Interview with Spring Alaska Schreiner, Owner, Sakari Farms (Feb. 3, 2022).

Water access and drought are also limiting production volumes. Some producers are decreasing the size of their operations because of drought, even though they have access to land. To support the Gila River Indian Community's commitment to save water during the current drought, Gila River Farms agreed to fallow 2,000 acres of alfalfa and 1,000 acres of cotton for two years. They had been considering adding more food crops to their operation, but now must wait until the fallowing program concludes. General manager Stephanie Saucedá-Manuel explained:

We were looking at focusing on more food products like beans and squash [...] to be provided within the community. However, [...] the water issue has come up, and although the community does have the water rights they're trying to save water for the next two years. And so that's kind of been a drawback, that we'll eliminate from 10,000 4,000 acres, so we'll go down to 6,000 acres for the next two years. However, because it is a fallowing program we will get paid for the acres that we'll fallow.⁹⁶

Risk mitigation programs that compensate food producers for saving water help producers remain economically stable during droughts. However, these programs do not solve the broader problem of ensuring water access and food supply in the long term. Water access issues are widespread across Indian Country, and will continue to be serious barriers in the context of climate change. Food producers simply cannot increase the food supply without access to sufficient land and water.

e. Environmental Impacts and Climate Change

Food production is susceptible to seasonality and extreme weather, and climate change has increased the unpredictability and frequency of adverse weather events. Environmental shifts are already impacting Native producers. A tribally-owned seafood enterprise in Washington described environmental impacts on their yields, and emphasized the need to protect animal populations for future generations, saying, "Another barrier is just the world we're living in right now, where salmon runs and clam digs and geoduck quotas are all falling. It's kind of scary to think about, so we've got to do whatever we can to improve those for our children and their children."⁹⁷ Similarly, chef Trina Fyant, who is Bitterroot Salish/Qlispe/Blackfeet and a member of the Confederated Salish & Kootenai Tribes located in what is now called western Montana, shared that climate change is affecting traditional foods in her region. Trina explained, "Some of the barriers that we face here, so much because we are foragers, is just the growing seasons and the climate, and the climate change that's happening. Some of our most valued products are huckleberries and morel mushrooms, and there's a very short season for those."⁹⁸ Climate change is decreasing access to culturally significant foods, which limits Native Peoples' abilities to practice their foodways. Spring Alaska Schreiner also highlighted how climate change is impacting food supply:

I work with a group called the Wave Foundation [...] and they provide free tribal food boxes to the tribes in Oregon and Washington. So the problem that came up is that they're wanting 10,000 units of tribal foods. So that would be 10,000 units serving size of wild rice, corn mush, salmon. [...] How does the producer keep up once we get the demand up? Because there's drought in Oneida with the corn a few years ago. There's drought with wild rice, there's shortage of salmon right now, the berries didn't do that well this year, they all rotted because they had a frost and then a heat wave last summer. [...] It was exciting to hear that someone wanted 10,000 units of our healing elderberry tea, but we don't have the acreage to grow the clover or the chamomile, or access to the elderberries. [...] What do we do when it gets too big, when we don't have the space, when climate change is affecting the Columbia River, our waterways, how do we get the food to people when there isn't any, or it's dwindling with these upcoming climate issues.⁹⁹

Climate change is creating instability and limiting the supply of Native-produced foods, and this will continue to be a pressing issue going forward.

⁹⁶ Zoom Interview with Stephanie Saucedá-Manuel, General Manager, Gila River Farms (Oct. 28, 2021).

⁹⁷ Zoom Focus Group Interview with anonymous (Jan. 27, 2022).

⁹⁸ Zoom Focus Group Interview with Trina Fyant, Owner, Qene's Catering (Feb. 28, 2022).

⁹⁹ Zoom Focus Group Interview with Spring Alaska Schreiner, Owner, Sakari Farms (Feb. 3, 2022).

f. Feeding Community First

Both Native chefs and Native food producers stated that Native-produced foods should go to feed the food producer's own community first. Then, when extra supply is available, the food can be used to build broader Native food supply chains. One chef described this as “community first, export second”,¹⁰⁰ and another chef said “we do need to make it accessible to our tribal members and our community first, before we can share that on an educational or an enjoyment level for people not in our community. Our tribal members, for me and the work that we do, are the number one priority.”¹⁰¹ Similarly, farmer Spring Alaska Schreiner explained, “The tribal food needs to go to our communities first. There’s a little bit of tug and pull going on with that right now, where we don’t have that much food.”¹⁰² Valene Hatathlie, owner of Val’s Frybread, emphasized that many reservations in her area don’t have grocery stores; to feed community members first, this kind of distribution infrastructure must be built. It is important to look at the limited supply of Native foods in Native communities from a holistic, systemic perspective. Food supply is limited by the confluence of many factors, which can come together to create dynamics that remove Native-produced food from Native communities. One chef explained:

I feel like we have entered this area where we’re playing this dance, of trying to help increase the demand so that it’s sustainable, and Indigenous farmers can have reason to increase the supply. [...] So to use one example [...], [wild rice] is something that is really a key ingredient that is associated with Indigenous foods that you see a growing number of chefs utilizing all across the country. But the issue that we’re facing is the constant need for advocacy in defending against all these pipelines and other things that are affecting the ability to grow wild rice, in addition to just the general environmental changes and factors. So a problem [...] in this region is that not only has this increased demand for wild rice, also we’ve just had a lesser harvest the past couple years, so what that’s done is really driving up the price and the accessibility [...].

¹⁰⁰ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

¹⁰¹ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

¹⁰² Zoom Focus Group Interview with Spring Alaska Schreiner, Owner, Sakari Farms (Feb. 3, 2022).



Hot sauce produced by Sakari Farms. Photo courtesy of Spring Alaska Schreiner, owner of Sakari Farms.

And what's happening unfortunately is that some of the communities that are harvesting and stewarding that rice, they don't have access to it. They're selling it all, or it's all going out to food producers. And so that's part of the struggle for me too, is how do we engage in this dance of helping to increase the demand and increase the knowledge and education around these ingredients, but how are we doing it in a way that is mindful of community access to these ingredients, because that is really the priority.¹⁰³

Increased national demand, smaller harvests, and rising prices can limit a community's access to their own traditional foods. Even when Native food systems participants all want to prioritize feeding community first, this must be addressed on a systemic and economic level to ensure that community access is actually maintained. Another chef spoke about the need for systemic change to support Native food producers:

It is a shame that people have to sell all of their wild rice. And talking with these young farmers that I'm working with, it's not the supply issue, it's the structural issue, right? We know that there will be climate and environmental devastation to crops. It's not an if, it's a when. And it's how much and how severely it's going to affect you. Unfortunately for a young person starting off in this industry, if they don't have that financial support that they need to be able to overcome that devastation when it does happen, [...] they're done. That work will not be able to continue. They won't be able to recover from an unsuccessful production level crop. Unless we have those safeguards in place, those safety nets, to help them recover in that situation. [...] If it's not water or a pipeline, it might be incredible heat, or cold, or an early frost, it happens. [...] So how can we do more, as the people purchasing, as the consumers, to support them, so that when it does happen, they're not forced to sell everything that they have to be able to continue what they need to do, and not have enough for themselves. [...] I can pre pay you for a crop, regardless, but then I do take a hit. I'm able to do that as a non-profit, but not people who are relying on that for their own livelihood, you know? We really need to look at the food system holistically and economically and say that everybody needs to be able to sustain themselves. I would love to be able to do all this work for free, but you can't. You need to be able to get the economic part of it. You can't just live in one world. So how can we do that?¹⁰⁴

Creating safety nets for Native food producers to withstand crop losses without losing their businesses is essential to support strong Native food systems. Furthermore, Native businesses at every level of the supply chain need to be able to make a living through their work. It is necessary to address the structural factors that shape community access to culturally significant and Native-produced foods, and to take a holistic view towards increasing the Native food supply.

ii. The Gap between Affordable Food for Native Communities, and Equitable Pay for Native Food Producers

Native food producers put significant effort into their work. They typically farm, harvest, ranch, and fish in sustainable ways, which can be labor-intensive. Some Native foods, such as steam corn, maple syrup/sugar, and juniper ash, require time-intensive processing utilizing specialized knowledge. Native foods tend to be high quality, nutritionally dense, specialty items that are in high demand. For all of these reasons, Native-produced foods can be expensive. However, these prices reflect an equitable level of pay for food producers' time, labor, and knowledge. At the same time, equitable pay for Native food producers can stand in tension with Native communities' access to these foods. Due to structural inequities, discrimination, and ongoing disenfranchisement, some Native communities are low-income and cannot afford Native-produced foods. A rancher in South Dakota explained:

Selling to your own tribal members or to your own citizens is hard because most of us are in impoverished areas. And to have grass-finished beef, it takes us anywhere from 24 to 28 months to finish these animals. So we have a lot of cost into these. So our meat is usually higher. [...] It would be great if our tribal members can purchase our beef, but that is not my target audience. Because they look at the sticker price and they're like, "that's too much".¹⁰⁵

¹⁰³ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

¹⁰⁴ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

¹⁰⁵ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

Survey respondents also discussed the discrepancy between equitable prices and being able to sell to Native customers, for example, one said “Our community likes the idea, but won’t pay for products.”¹⁰⁶ And, 32 respondents answered a question about factors that prevent them from participating in a Native supply chain; of those, 47% said that when they price their products in a way that is equitable/profitable for their business, it becomes difficult for Native businesses or consumers to buy their products.

Having to go off-reservation to find customers was a common theme among ranchers, farmers, and fishers. A rancher in Arizona near the New Mexico border explained:

Very interestingly to tell you, that’s been tough for me, to sell my own product to my own people. [...] It’s been tough. I have to go to [relatively large towns/cities in the area], like those farmers markets off the reservation. [...] That’s where most of my sales are. And my customers are not really my own people or anybody Native.¹⁰⁷

Another rancher said his prices are too high for members of his own community, but many non-Native customers think the prices are good, in relative terms:

Like almost everybody [in this focus group] has said, our greatest demand is from non-tribal members that want to have less expensive beef to purchase. [...] They’re the ones that are calling us because they look at that price, and to them it’s a cheaper price than going to Safeway or buying a steak at Bashas’ or somewhere else. [...] So our small little trying to get something done is just that local person that wants to buy a few packages of beef. But I would love to be the person that supplied beef to [a tourism enterprise his tribe runs].¹⁰⁸

Some Native institutions also cannot afford Native-produced food. The Quapaw Nation’s meat processing plant used to sell meat to their reservation’s schools, but this was unsustainable because the schools’ budgets were too low. Mitch Albright, the Director of Agriculture for the Quapaw Nation, explained:

Here at Quapaw we have three schools within our jurisdictional boundary that we used to supply home raised quality beef and buffalo products to for just a little while. And the problem that we ran into was the school system funding. They can barely afford the commodity market pricing, versus our pricing here in Quapaw.¹⁰⁹

Many food producers cannot offer flexible pricing and still make a living; additional work is needed to bridge this price gap and connect them with Native consumers. Some producers offer flexible pricing anyways—for example, Yawelyahsi•yó• Farm offers sliding scale pricing, and Lucas and his partner make up the difference with off-farm jobs. Other producers subsidize lower cost food for community members by charging other markets higher prices. Daisy and Rusty at Birds N Things Farm use this approach. Daisy explained, “It’s a balancing act. Right now we’ve achieved something that I have always wanted, which is charge our high-end customers a high-end price, like the restaurants, so when it comes to our lower range customers, we can afford to give them or sell them good food at a very affordable cost or for free.”¹¹⁰ When Native producers are able to offer flexible prices to lower-income community members, they can meaningfully increase access to traditional foods.¹¹¹

¹⁰⁶ Other respondents said to become more involved in a Native supply chain they’d need a “fair price on my products,” “Reliability and pricing,” “Easy access, adequate supply, competitive pricing,” “They would need to be available and cost would have to be reasonable,” and “Most vendors we are able to work with do supply a wholesale pricing which allows us to order more or get items in bulk. I understand the process in most native made products and there is time involved. Normally there is no issue purchasing products at full retail but it makes it difficult for us to make any type of income when we have to up charge to make a small profit. Most products sit in the retail area for a long time [...]”

¹⁰⁷ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

¹⁰⁸ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

¹⁰⁹ Zoom Focus Group Interview with Mitch Albright, Director of Agriculture, Quapaw Nation (Nov. 19, 2021).

¹¹⁰ Phone Interview with Daisy Perez-Defoe and Rusty Defoe, Owners, Birds N Things Farm (Oct. 21, 2021).

¹¹¹ Supporting Native businesses with scaling is another way to increase community food access. Businesses can often provide their products at a lower margin when they are producing them in a larger volume, particularly if overhead costs remain the same.

In other cases, Native customers or institutions are able to pay the full price for Native-produced foods, but choose instead to purchase lower-priced foods elsewhere. Customers may be unaware of the work Native producers put into their products and the higher product quality, so their prices may seem, at first glance, to be unreasonable. For example, Valene Hatathlie, owner of Val's Frybread mobile food stand, shared that customers are often shocked by the price of dishes made with steam corn. However, Valene drives several hours to source the corn from multiple suppliers, and it is expensive to purchase. These elements of Native supply chains are not visible to consumers. Additionally, Native ranchers and fishers said they experience stigma against Native-produced meat and fish. One rancher explained:

There's a stigma with Native ranchers too. Here in South Dakota, we don't get the top of the prices a lot of times because they think we don't take good care of our cows. So we almost have to do more. We almost have to put more inputs into our animals in order to prove that we're good ranchers.¹¹²

Research participants identified a need for education for Native and non-Native customers about why the prices of Native-produced foods are, in fact, equitable and necessary. As the rancher quoted above explained, "They've got to understand, they can't try to shortchange us either because we've got to try to make a living, you know? Our price is our price because that's what it's got to be in order for us to make money."¹¹³ Education for consumers could reduce sticker shock and help build equitable markets.

Some customers are willing to pay the full price for Native-produced foods. For example, Native chefs said they typically prefer to pay Native food producers whatever price they ask for. Ben Jacobs, co-owner of Tocabe: An American Indian Eatery, explained that he and co-owner Matt Chandra don't negotiate on pricing:

What I mean by "we don't negotiate" is if that's your price that's your price. If that's what you want to sell it for, we're not going to come in and be like "Mmm, nope. Oh it's \$4 a pound? We're going to give you \$2." [...] I don't know what that stuff's worth. I don't grow that, I'm not there every day getting my hands in the dirt, I don't know how hard it is. [...] So if you're going to tell me what your time and your effort and your work is worth, then that's what we should pay. And then it's on Matt and I to sort out how we can try and turn that around and perpetuate the process. It is a give and take scenario [...]. We want to respect what you have, but at the same time we need people to respect that if we can't afford it we can't afford it.¹¹⁴

Chefs recognize that Native producers know exactly how much time and energy they put into their products and are therefore best equipped to decide on an equitable price. Chefs also said they want to buy from producers who they trust to harvest foods ethically and sustainably using Indigenous knowledge. Chefs feel that failing to pay fair market value could push harvesters to over-harvest or use other damaging practices in order to make ends meet.

Some chefs are also able to pass higher prices on to their customers. As one chef explained, "I pay a fair market price, so I don't negotiate them down, if that's what they feel they need to survive then that's the price I buy, and then that's the price I have to turn over to my clients."¹¹⁵ In this way, chefs can advocate for broader recognition of the value of Indigenous foods. When chefs cannot pass higher prices on to their customers, they often balance food costs by sourcing some lower cost items from non-Native suppliers, or providing some of their own labor pro bono. Some chefs do negotiate pricing. Vanessa Casillas, the former business manager of Gatherings Cafe, negotiated pricing to be able to purchase from Native suppliers within her program budgets. However, Vanessa was working to increase access to Indigenous foods for Indigenous communities—the food went into the cafe's elder food box program, and into supplying the restaurant, which serves many Native people and organizations. In some cases, Native chefs may negotiate so that Native consumers can access Indigenous foods or afford a restaurant's products, or so that a restaurant can cover operational costs.

¹¹² Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

¹¹³ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

¹¹⁴ Zoom Interview with Ben Jacobs and Matt Chandra, Co-owners, Tocabe: An American Indian Eatery (Oct. 19, 2021).

¹¹⁵ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

Native chefs are enacting Indigenous economic systems which seek to create mutually beneficial, balanced economic relationships where everyone involved can flourish. By paying equitable prices, Native chefs and food processors can address broader market discrimination against Native food producers by shifting the market value of Native products. Still, systemic work must be done to ensure that Native businesses at all levels of the supply chain can make a good living, and that Native communities can access Native-produced foods.

iii. Commodity Competition

Another barrier to building Native food supply chains is competition with the commodity market. Native food producers are losing potential customers, both Native and non-Native, because they are purchasing commodity products instead. This theme came up specifically with ranchers and meat processors, though it is relevant to other products, such as flour. Ranchers said it is difficult to establish steady markets for their meat because the commodity market offers meat at unattainably low prices.

Commodity suppliers use industrial ranching methods and economies of scale to produce large volumes of meat at low cost. Ranchers emphasized that it is extremely difficult to compete when operating on a smaller scale. Mitch Albright, the Director of Agriculture for the Quapaw Nation, explained, “That’s always been an issue, and the commodity chain has just always been a driving force. Just because we’re a little guy. [...] We can’t compete commodity, we never have been able to, and that’ll never change until something on the commodity side changes.”¹¹⁶ Mitch stated that the Quapaw Nation operates on 6000 acres, and processes 160 steers a year from their 340 head herd. They opened a 25,000 square foot processing facility in 2017, with 7 employees. Mitch described the difficulties the facility has experienced since their launch due to the impact of commodity competition:

It’s an extremely tough business. Since 2017 processing costs have increased 25%. [...] We’re not a commodity supplier. We’ve always tried to compete commodity, but we can’t, and I don’t see how anybody could. We’ve dabbled in the grass-fed markets, we’ve dabbled in the commodity markets, we’re not even supplying our own casinos and daycares and title 6 programs [...] anymore. Because of the commodity market. Because the little guy just gets stepped on every time. And it’s not going to change until the four big packers in the United States start lining up and doing what they’re supposed to be doing, rather than stepping on the small ranchers across the United States. And eventually, at some point I think Indian Country is going to take over.¹¹⁷

Mitch went on to explain that from a food sovereignty standpoint, the Quapaw Nation can produce their own meat, but when they can’t sell it at a price that covers their production costs, their ranching enterprise ultimately becomes economically unsustainable. For this reason, they do not process their own beef anymore; they switched to being a cow-calf operation which sells live animals. This means they aren’t able to control where their meat ends up—a barrier to building a localized food supply chain for Quapaw families. A rancher in Arizona also spoke about commodity competition:

Our tribe is small, we probably produce 1500, maybe 2000 calves a year. [...] That’s small potatoes compared to what is happening on the industry side which is crippling us [...]. Competing with that industry, it’s relentless, it’s not going to ever change until that industry is ready to let us in. [...] And it’s the same with the grass-fed beef process. Those individuals that are producing grass-fed beef, they don’t want us in either, because that market is theirs, they want that to be held under their label. So that tribal label is going to always be the last one that hits the shelf.¹¹⁸

Since it is difficult to compete with the commodity market or with the alternative grass-fed market, ranchers have few avenues to establish a customer base. To address this, many producers are trying to transition to direct marketing, though this can be challenging. As the rancher in South Dakota explained, “The reason I’m going direct marketing and doing this is the commodity. You’re right, 100% right, the commodity.”¹¹⁹

¹¹⁶ Zoom Focus Group Interview with Mitch Albright, Director of Agriculture, Quapaw Nation (Nov. 19, 2021).

¹¹⁷ Zoom Focus Group Interview with Mitch Albright, Director of Agriculture, Quapaw Nation (Nov. 19, 2021).

¹¹⁸ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

¹¹⁹ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

Another issue Native chefs and food producers highlighted in relation to commodity competition is consistency—this is important to supplying larger volume customers, however, it is difficult to maintain when producing on a smaller scale. A rancher in South Dakota explained:

I would love to sell to more Native organizations or work with them. Going into brainstorming what we need to do, finance is one of the biggest things, if we can allow either more investors or financiers into the Indian Country to help us, because one thing that becomes an issue for us smaller ones is consistency of product. If we're barely making it, and we have to make ends meet just to make our cattle ranch, a lot of times it's really hard to be consistent with our product. So that's why grass-fed is a little easier than grain-finished for Native ranchers, because a lot of times we don't have the facilities or the equipment to be in the conventional feeding system. And grass-finished is a little easier because your input costs are a little lower. But I think that one of the biggest things is allowing or having investors or being able to finance a little easier.¹²⁰

Investment can increase a producer's ability to create a consistent product and compete within the marketplace.

There are counterexamples that show competition with the commodity market is possible under certain circumstances. The Osage Nation's processing plant took a significant capital investment up front, but is now successfully competing with commodity prices and providing affordable meat to Osage tribal members. Former general/plant manager Joe Thompson attributes this to their minimal transportation costs and their efforts to maximize the value of the carcasses.¹²¹ Twisted Cedar Wines also said minimizing transportation costs keeps their wine affordable, and supports sustainability. These examples show that it can be possible to compete with the commodity market in some situations.

iv. Difficulty Connecting with Native Customers

a. Direct to Consumer Sales to Native Customers

A trend that emerged across the farming, ranching, and fishing sectors is that despite their strong desire to expand their Native markets, many Native food producers are having difficulty connecting with Native customers to make direct sales. In some cases, this relates to the price of these foods, as discussed earlier. Research participants also stated that it is difficult to locate potential customers, and that many potential customers are unaware of the various payment options for making this food affordable.

It can be difficult for producers to locate Native customers. Lucas Humblet at Yawelyahsi•yó• Farm shared that one of the primary reasons he and his partner started their farm was to address food system inequities by feeding Indigenous community members in the Minneapolis area. They offer sliding scale pricing and payment plans for their CSA boxes to make their food accessible to everyone. However, they have had difficulty locating Native customers:

We haven't met all of our goals in feeding the Indigenous community that we wanted to. We were hoping to have more community members eating our food, but it's been a struggle to do that. [...] I think it's about connecting to the community, I don't think that it was really that much about the pricing. [...] But it was like "how do we reach these people?" And that's still what we're trying to figure out. [...] I think our biggest barrier was finding the Indigenous consumers on the other end, so getting that food to that targeted community that we wanted to. [...] Aside from going door to door and knocking on everyone's door saying "hey, do you want some of our food?"¹²²

Many farmers don't have time to conduct extensive customer discovery in addition to producing food, and there are not many existing avenues for connecting producers to underserved communities who may not currently shop at farmers markets or seek out local food.

¹²⁰ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

¹²¹ The Osage Nation has 2500 head of cattle, about 250 head of bison, and at the time of their participation in this research they were harvesting 20 animals a month, with plans to increase this number over time.

¹²² Phone Interview with Lucas Humblet, Co-owner, Yawelyahsi•yó• Farm (Oct. 21, 2021).

Community lack of awareness about alternative pricing options also prevents producers from connecting with Native customers. Daisy Perez-Defoe and Rusty Defoe found that many Native community members are not aware of the flexible pricing options they offer at Birds N Things Farm. Daisy explained:

I've come into an issue where most of the Native American community members that I've come in contact with, they have a certain picture in their head when they say a farmer selling direct to consumers. They don't see the Mexican or the Native, [...] they picture the white person selling. [...] I have seen it in many lower income communities, including where I grew up in the Mexican community in California. [...] When we picture a farmer, we picture the white man, and we picture a large amount of money in one go and no flexibility. What we're trying to get into other people's heads [...] is that there are farmers out there that can work with your budget, that you can make payments, that you can use farmers markets and do food stamps that way, or let's say you want to volunteer a couple of hours, then that labor in exchange for some meat. [...] But it's very very hard to get that mindset changed, because there's not that many Native Americans that own farms.¹²³

Daisy emphasizes that buying direct from farmers can seem inaccessible to some Native consumers. Increasing public awareness of Native farmers and flexible pricing can have an impact—as Daisy explained, “When we do our farmers markets and we can take food stamps and we can take a little bit more of a lenient payment system, [...] we see a great increase in Native American customers.”¹²⁴ Direct sales to Native customers could be increased through outreach and marketing to let people know that farmers may offer payment plans, flexible pricing, and/or practice Indigenous economic systems such as bartering.

b. Sales to Native Institutions

Tribally-owned businesses and Native institutions, such as convenience stores, grocery stores, and schools, have the purchasing power to be large scale Native buyers, and can build Native supply chains by distributing Native-produced foods to a large number of Native consumers. Yet it can be challenging for Native food producers to build business relationships with these entities. Besides price point and commodity competition, research participants said barriers include creating market connections, institutional purchasing preferences, and lack of confidence in Native producers. Some producers don't have a clear pathway to make business connections with Native institutions. For example, a rancher in Arizona near the New Mexico border said “I definitely would love to work with the school systems. [...] How can you make connections with that? [...] How do you make that happen? To be able to sell to your schools, to all these other little small entities within the reservation.”¹²⁵ Support to connect producers to these entities could be useful, particularly when there are bureaucratic processes involved in institutional food procurement. Institutional policies also create barriers. Some Native institutions require vendors to rent space in their stores, or prefer to purchase from large distributors for more streamlined logistics. Jen Falck, owner of Kahulahele Farmstead, explained:

The other problem I've had is, one example is getting eggs into [a tribal] nation's convenience stores. They want me to rent space. And that's just not feasible for me to rent space. My response to that is “no, you should give me the space.” I'm an up and coming new farmer, tribal member, they should be giving us space in their retail establishments. And that's been a struggle for me. [...] They want to order from a major distributor, they don't want to deal with 16 tiny little vendors like me to get their shelves stocked. So again, a larger distributor would be helpful.¹²⁶

Because these stores would prefer to work with a large distributor, a Native aggregator or distributor could help build supply chain connections. Another example of a policy barrier is that, to avoid favoritism, Cassandra Dickerson's tribe does not purchase from tribal businesses:

¹²³ Phone Interview with Daisy Perez-Defoe and Rusty Defoe, Owners, Birds N Things Farm (Oct. 21, 2021).

¹²⁴ Phone Interview with Daisy Perez-Defoe and Rusty Defoe, Owners, Birds N Things Farm (Oct. 21, 2021).

¹²⁵ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

¹²⁶ Zoom Focus Group Interview with Jen Falck, Owner, Kahulahele Farmstead (Feb. 3, 2022).

My tribe's not very supportive of Native businesses, because they don't want to favor some people over the other so they just don't favor any of them. It's really unfortunate because we've tried and tried and tried, we've got tons of entrepreneurs in our tribe. [...] I wish that I could support and sell to and work with my tribe a little bit more, because we have our casino and I could almost get enough to supply their steakhouse pretty much fully, but they don't want to contract with a tribal member. Other tribes, they would probably be cool with that, just, I'd like to support mine instead.¹²⁷

Another rancher who wants to sell meat to Native institutions such as daycares, schools, jails, and small businesses stated that he experiences stigma that makes it difficult to sell on his reservation, saying "If we want to sell our product on the reservation, sometimes depending on who you are, and if you're a progressive person, you're not always looked at as the most desirable person when it comes to wanting to get things done. It's almost like you're a negative because you're trying to do things."¹²⁸ Food producers also said they feel their tribes don't have confidence in them, and highlighted the impact tribal support would have on their businesses. A rancher in South Dakota explained:

A lot of times our tribes don't see that future ahead, and they're not looking to help. [...] If we had assistance, I know a lot of reservations probably have, like ours, our bigger grocery stores are all tribally-owned. If our tribally-owned can purchase our beef, that would go a long ways. But we just need those connections, and they need to see the struggles their Native ranchers are in, to try to make it in the supply chain.¹²⁹

There are a number of reasons for tribes not wanting to purchase from Native producers. However, there is a need for tribal leaders and/or managers of tribal institutions to consider whether these policies or dynamics serve the interests of their communities, and to consider purchasing from their tribal member food producers to support food sovereignty. This theme was not ubiquitous, and some research participants are successfully selling their products to tribally-owned restaurants and institutions. For example, a tribally-run farm in Arizona supplies food to the schools on their reservation, demonstrating that it is possible to build these relationships.

c. Tribal Casinos as an Underdeveloped Market

A prominent theme is that Native food producers would like to either establish or increase sales to tribally-owned casinos. These markets are currently underdeveloped—several research participants are selling to casinos,¹³⁰ but numerous others have tried to establish these relationships without success. Barriers include product volumes/consistency, price competition, and the priorities of casino management.

Mitch Albright, the Director of Agriculture for the Quapaw Nation, explained how product inconsistency can be a barrier to selling to casinos:

If you're a small guy, consistency even with 160 steers is going to be up and down. Even our casinos and our steakhouses, they want to use our product and put our tribal logo on it, and it's a great story, but if they can get consistency on 150, 200,000 head through a large packer, then they're going to do it every time. Cause they're in the market of making money too.¹³¹

Similarly, a tribally-owned seafood enterprise in Washington described consistency as their biggest marketing challenge—they can only provide each product on a seasonal basis, while broadliners like Sysco can provide a consistent year-round supply.

¹²⁷ Phone Interview with Kassandra Dickerson, Owner, Mountain Lake Cattle (Oct. 27, 2021).

¹²⁸ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

¹²⁹ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

¹³⁰ The CRITFC member tribes' casinos purchase portions of their fish from CRITFC fishers, Salmon King Fisheries sells to some Native-owned casinos in the southwest, and Gila River Farms sells their olive oil to the Gila River Indian Community's casinos.

¹³¹ Zoom Focus Group Interview with Mitch Albright, Director of Agriculture, Quapaw Nation (Nov. 19, 2021).

Native producers identified price competition as a significant barrier to selling to casinos. A representative of a tribally-owned farming enterprise in California explained:

The biggest barrier that we've faced as far as selling our product to other tribes, gaming tribes with businesses like gift shops and casinos, has been price point. We're not the Coca Cola of olive oil, we focus on quality and we focus on the story and we focus on all of our products being grown on the tribe's homeland. [...] When I or my staff goes to present to a tribe or a food and beverage manager/director, their customer base may not necessarily be interested in where their olive oil is coming from. They just want a hot meal, they want it fast and want to get back on the floor. So that's been a challenge on the food service side. They have to watch their bottom line of course, and cater to their customer. [...] But at the same time in their gift shops or in their markets, our olive oil has done pretty well.^{132 133}

Other food producers shared similar comments. A tribally-owned seafood enterprise in Washington sold to their tribe's casino until they were out-competed by Sysco:

We've gone through the same thing with supplying fish to the casino. Our motto is it's local catch, by our tribal members, top quality. [...] We had every fish that came through our plant and we processed went to our casino, to the restaurants. And then as [another focus group participant] said, with different management styles and Sysco coming in, we kind of got thrown to the back burner, because like he said they can get the product for quite a bit cheaper.¹³⁴

Despite their decreased sales to their casino, representatives of this enterprise anticipate that their business relationship might grow in the future. Their tribal members have been pushing for tribal and local sourcing, and their casino's management is now considering building a seafood restaurant focused on the local fishermen catch. CRITFC's salmon marketer Buck Jones also spoke about how casino management's priorities shape their purchasing:¹³⁵

The food and beverage isn't the money maker at casinos [...]. And what happens is that, at least in my experience, is that maybe the people that are running the casino are tribal people, but when it comes down to the food and beverage, then they're maybe not tribal. So the tribal perspective of getting somebody's local food in there isn't huge for them. So they'll deal with the Syscos and they'll deal with the big companies because they can get it at an inexpensive price. And more than just seasonal.¹³⁶

Management plays a crucial role in determining whether a casino prioritizes purchasing low cost food, or prioritizes sourcing from Native-owned businesses. Representatives of the Cedar Band of Paiute's Twisted Cedar Wines spoke about how tribal leadership can increase Indigenous sourcing in their casinos:

Phillip: I think the biggest thing if tribes want to have more tribe to tribe business, they have to be involved with the management. Or they need to make management aware that's a priority for them. Because if they do make that a priority, and the casino has a percentage goal that they do x amount with other Native businesses [...] then they'll do it. There's plenty of great products out there that are produced by Indigenous tribes, but if they're not looking for them they're not going to bring them in. [...] It's easier to buy your food from Sysco than it is to buy from a bunch of individual producers, even though buying from a bunch of individual producers including more Native producers might mean better quality, sometimes the easy route is the route that gets taken.

¹³² It is notable that this enterprise successfully sells their product in casino gift shops, as this may be a potential area of growth for other Native food producers who aren't having success selling their products to casino restaurants.

¹³³ Zoom Focus Group Interview with anonymous (Feb. 3rd, 2022).

¹³⁴ Zoom Focus Group Interview with anonymous (Jan. 27, 2022).

¹³⁵ Buck also shared that Native fishers and food producers have told him that they couldn't get their product into their own tribe's casinos. Buck has made introductions between these producers and tribal decision makers to try to address this issue, and presented to the National Indian Gaming Commission on the topic of getting Native-produced food into tribal casinos.

¹³⁶ Zoom Focus Group Interview with Buck Jones, Salmon Marketing Specialist, Columbia River Inter-tribal Fish Commission (Jan. 27, 2022).

Bill: I think one organization that really exemplified wanting to do Native to Native trade was the National Museum of the American Indian, in Washington DC. Restaurant Associates has the contract for the restaurants there, and they were always searching out Native food. Popcorns, jerkies, salmon, quick to-go items that they could sell. [...] They exemplified the true desire to buy Native to Native.¹³⁷

These comments demonstrate that Native institutions can prioritize Indigenous sourcing even when their food service businesses are managed by contractors.

v. Food Safety, Meat, and Seafood Regulations as Supply Chain Barriers

Food safety regulations, particularly for animal products, can restrict Native to Native commerce and limit market access for Native food producers. There are disparities in producers' abilities to comply with food safety regulations, based on their access to processing infrastructure.¹³⁸ Other barriers include cost, training, and jurisdictional complexities.

Food safety certification plays a significant role in market access. As Brigette McConville, owner of Salmon King Fisheries, explained, "Just having that state certification, you're able to sell—if you produce a lot of fish—you can sell to prisons, or schools for their lunch programs, and there's just so many open doors that are available."¹³⁹ However, the cost of food safety certification can be prohibitive for some producers. A Native chef shared that a tribally-owned farm she previously sourced from stopped selling meat at farmers markets because of certification costs. She explained, "The USDA certification and processing fees for those inspectors were \$85 an hour. And they could no longer afford the \$85 an hour to have someone on site to harvest the bison to sell at farmers markets, so they're gone." Similarly, a rancher in Arizona near the New Mexico border spoke about trying to certify her vegetable operation:

You're asked to do food safety, but then the food safety inspector's in Yuma Arizona, and then for them to come to the north, onto the Navajo Nation, they're actually charging 1000 dollars an hour. By the time they get up here that's six hours, and if you're a small producer, [...] there's no way. That couldn't happen.¹⁴⁰

Certification costs can be inequitable for Native producers in remote areas; this must be addressed so these producers can access broader markets.

Fish and seafood enterprises spoke about the importance of training on regulatory compliance. A representative of a tribally-owned seafood enterprise in Washington explained, "I also think one of the other barriers is on the regulation side. You know being from a reservation, our fishermen aren't taught what [the Department of Health] is expecting off-reservation."¹⁴¹ To address this, some tribes and Native organizations are providing HACCP training for their fishermen. This allows them to access additional markets and obtain higher prices for their products. CRITFC's salmon marketer Buck Jones explained:

There was a stigma or a misconception about the tribally-caught fish. [...] So we developed some quality handling classes, we started providing seafood HACCP for our tribal members, and gave the fishers opportunities to improve the things. [...] We had to overcome that stigma, putting ice on there and things like that, getting insulated totes. [...] But we heard it from individual tribal members, "Well, we've been handling our fish since time immemorial, we know what we're doing and nobody's gotten sick."

¹³⁷ Zoom Interview with Bill Tudor and Phillip Anderson, Executive Vice President and Vice President of Sales, Twisted Cedar Wines (Oct. 19, 2021).

¹³⁸ The fish and seafood businesses who participated in our interviews/focus group all had access to adequate processing infrastructure, whether through a third party or their own facility. However, there may be unmet need for fish processing infrastructure across Indian Country more broadly, and based on this research there is a need for more Native-owned fish processing facilities. In contrast, the majority of the individual Native ranchers reported that it is difficult to access state and federally inspected processing, due to limited facilities in their regions and a shortage of state and federal meat inspectors.

¹³⁹ Zoom Focus Group Interview with Brigette McConville, Owner, Salmon King Fisheries (Jan. 27, 2022).

¹⁴⁰ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

¹⁴¹ Zoom Focus Group Interview with anonymous (Jan. 27, 2022).

And it's true, we are sovereign, and I just look at the squares that we live in, or whatever. Once we're in this little square, I'm in my little square and that's my reservation. Yeah, we are sovereign. But our food that goes through the food chain, it's going past the reservation lines, it's getting into commerce and so it's got to be a well maintained and properly handled fish or product [...]. So we developed plans and developed some trainings. And now our fish is staying up there in price [...]. Because our fish is going worldwide, we've got to handle it really well.¹⁴²

Buck's comments underscore the importance of regulatory compliance for Native fisheries that sell their products globally, and the tensions between tribal sovereignty and federal food safety regulation.

Most Native food producers have to deal with multiple sets of regulations based on jurisdictional boundaries; this complicates compliance. Jen Falck, owner of Kahulahele Farmstead, explained:

One of our largest distribution barriers is jurisdiction. Most of the product that we sell is chicken, pork, and eggs. I am an Indian living on an Indian Reservation, so I'm subject to those set of food code standards. Then to get off-reservation that's a different set of standards. So it always seems like this endless conversation about food safety standards, for me, licensed meat processing facilities, on reservation, off-reservation. It feels like every time we want to try something new it's a whole new conversation yet again about those sorts of issues.¹⁴³

It is time consuming to deal with multiple sets of standards—this creates additional work for Native producers who work or sell on reservations, compared to people who do not. Similarly, a rancher in Arizona explained:

We also have hoops within the tribe. So we're probably the most regulated people on earth. We have the federal regulation that we have to jump through if we want to transfer our beef across state lines—USDA, we have the Arizona Department of Agriculture if we want to sell our product within the state of Arizona. [...] I would love to supply more beef to my reservation, to the daycares, to the schools, to the jails, to our small businesses that are out there, yes, the answer is yes, I would love to do that. But we're hamstrung by those three entities that I just said, the federal process, the Arizona Department of Agriculture process not having enough inspectors to inspect our beef, and then third, are you even desirable within your own reservation?¹⁴⁴

This rancher emphasizes that Native people are regulated in inequitable ways. A rancher in Arizona near the New Mexico border also shared that it is difficult to work within state, federal, and tribal regulations simultaneously, saying “It's been a struggle. On the Navajo Nation you have the Navajo Nation laws that you have to abide by, plus the federal and the state, it's ridiculous. And how many hoops that we have to jump through just to get our business off the ground even.”¹⁴⁵ Furthermore, when a reservation sits within multiple states, federal inspection is required for meat to cross state lines, even within reservation boundaries; this is a barrier to intra-tribal supply chains and food sovereignty. There can also be confusion about which regulations apply in specific situations. The same rancher explained:

As far as direct marketing, it's been tough. Trying to sell to my own people [...]. I tried working with a restaurant and they were like “it has to come from a USDA facility, that's the only way we could work with you.” I don't know how true that is. But then when I look at the statute on our Navajo reservation, there's really no statute on that piece, like what the laws are and so forth.¹⁴⁶

When producers or customers are unclear about which regulations apply due to jurisdictional complexities, this creates barriers to market access, and it can be difficult to figure out where to turn for clarity on these questions.

¹⁴² Zoom Focus Group Interview with Buck Jones, Salmon Marketing Specialist, Columbia River Inter-tribal Fish Commission (Jan. 27, 2022).

¹⁴³ Zoom Focus Group Interview with Jen Falck, Owner, Kahulahele Farmstead (Feb. 3, 2022).

¹⁴⁴ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

¹⁴⁵ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

¹⁴⁶ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

Chefs also spoke about how jurisdictional complexities limit their ability to source Native-produced foods, particularly meat. Vanessa Casillas, the former business manager of Gatherings Cafe, shared her experience sourcing bison:

I was like you know what, [...] we use a lot of bison—let’s see if we can’t find a Native vendor. So I did my searching, and there’s different barriers with jurisdiction if you have vendors in South Dakota and crossing state lines, and selling to vendors outside of the state. [...] I contacted other butchers there and they didn’t know how to get past that. There were offers like “oh, we can take a whole animal, we just have to find a place to butcher it up, and as long as we take it across state lines and then do the butchering then we can sell it to you legally.” [...] There was such a barrier there that they had to work around that, and then of course that cuts into their profit.¹⁴⁷

Furthermore, chefs cannot sell meat to the public unless it is USDA or state certified. One chef explained:

The USDA certification, it’s a barrier to entry for farmers in Alaska. [...] I know more ranchers that I can’t use their product than I can. I have three people who I can get elk, I can get bison, I can get beef, I can get pork, I can get sheep, lamb. And then there’s the gray area producers, where, for that small party event, I can source things that are in the gray area. That doesn’t feed the larger part of my market base as I grow this business.¹⁴⁸

Similarly, another chef spoke about sourcing within the legal gray area, which allows chefs to use uncertified meat for “small private events not for the public”.¹⁴⁹ However, this does not support the long term growth and scaling of Native supply chains. Another chef spoke about the need to find a pathway to bring this meat to market:

I actually sit on a meat processing advisory board for the USDA on how we can make it more accessible, these meats and these traditional proteins, to our tribal members, with this wild food policy. Because it is so crucial to get into our communities on a much more broad level, where it would be accessible to use as a business. Because it’s a food that we’re proud of.¹⁵⁰

There is unfulfilled demand from Native food service businesses for Native-produced meat, including wild game, and there are producers who want to sell to these and other markets. Addressing regulation barriers to make this possible would strengthen Native food supply chains.

vi. Staffing and Limited Personnel Bandwidth

Having an insufficient number of staff can prevent businesses from building Native supply chain relationships. When personnel bandwidth is limited, attention is often directed to pressing day to day matters, rather than longer term projects like expanding market opportunities. A representative of a tribally-owned fishery in Wisconsin explained:

[Building Native supply chains] is something obviously we’d like to do. I think a big hurdle is the time we’re in now. With COVID being such a huge factor, [at our fishery] specifically they have over 60 positions that need to be filled. [...] [People] get thrown into a position where they’re trying to do more than what their job is. So then they’re not able to give 100% to each thing, so doing some of these programs, or just even being contacted, we’re just trying to keep up with doing things locally, but it’s hard to even just reach out. [...] There’s just nothing we can really do about that until [...] we start getting people in key positions to be able to give their full attention or their drive or directness to a particular project that can grow the distribution or be the workings in between businesses.¹⁵¹

¹⁴⁷ Phone Interview with Vanessa Casillas, former Business Manager, Gatherings Cafe (Oct. 19, 2021).

¹⁴⁸ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

¹⁴⁹ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

¹⁵⁰ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

¹⁵¹ Zoom Focus Group Interview with anonymous (Jan. 27, 2022).

It takes time to locate entities to do business with, build relationships, and work out logistics, especially when key supply chain processes are not yet in place. To do this work, Native food businesses must first have adequate staff for daily operations; this has been particularly challenging during the pandemic.

Vanessa Casillas, the former business manager of Gatherings Cafe, described it being difficult to source from suppliers with limited bandwidth—for example, one farm’s staff weren’t willing or able to do the legwork to ship products to her. Vanessa explained, “I feel like maybe they were also having to do the farming, having to do the processing, having to do the sales, and spread very thin.”¹⁵² Vanessa had more success sourcing from suppliers whose employees could take time on the clock to plan shipping logistics. Staff bandwidth also shapes restaurants’ abilities to source from Native suppliers. Vanessa explained:

Before [the cafe] hired me, there was no one person specifically doing my job, it was really on the chef. [...] So you can imagine if he’s got to run a kitchen, plus do the business management, source vendors, all that, you have very little time, and he wasn’t able to get everything done [...]. And so then they were like, this role actually needs the support of another person. So they created my position. So I think that might be the case in other places, you know? They might be asking one person to do way too much. And if there isn’t the support provided for that one person [...] then what they can do in eight hours a day is limited.¹⁵³

Similarly, Watecha Bowl owner Lawrence West highlighted how bandwidth can limit a restaurant owner’s ability to source from Native vendors:

A lot of the reasons why people don’t have access to these resources is simply because you don’t ask. [...] In a community like mine, my consumers are the farmers. So just ask. People will say, people will come to you. [...] My phone rings all the time, and it gets hectic, and I know when business owners get to a certain point they just stop answering their phone or screen their phone or they write people off [...]. But me, I listen to those people, that makes me curious, like “why are you in my restaurant with a pumpkin?” You know? “Oh well, this pumpkin is my product, I grow it on my farm with 80 other products” [...] So just take an extra second and hear people out, the resources are there. If you’re a business owner and a restaurant, I guarantee small farms have tried to contact you. They’ve come into your establishment, they’ve sent emails.¹⁵⁴

Lawrence emphasizes how overworked restaurant owners can miss sourcing opportunities when they don’t have time to follow up with suppliers who have reached out. Survey participants also cited limited bandwidth as a barrier. When asked what could increase their participation in Native food supply chains, respondents said “We would need to have more staff,” “Stop working my 8-5 job and create a strong customer base,” and “Time. Though we have employees, they are primarily servers who work on the weekends when we are open. Another employee works production 3-4 days per week. Leaving me to do the rest. I simply can’t work 70-80 hours per week and be involved in other worthwhile projects.”

¹⁵² Phone Interview with Vanessa Casillas, former Business Manager, Gatherings Cafe (Oct. 19, 2021).

¹⁵³ Phone Interview with Vanessa Casillas, former Business Manager, Gatherings Cafe (Oct. 19, 2021).

¹⁵⁴ Zoom Interview with Lawrence West, Owner, Watecha Bowl (Sep. 29, 2021).

HOW THE COVID-19 PANDEMIC SHAPED NATIVE FOOD SUPPLY CHAINS

This section presents survey data on how the pandemic impacted Native food businesses, and then provides more detailed information on trends in pandemic impacts based on data from interviews and focus groups.

Half of businesses surveyed found that the pandemic changed their level of participation in Native supply chains. Out of 34 respondents, 21% sold their products to a smaller number of Native customers, and 6% purchased products from a smaller number of Native businesses. 26% sold their products to a larger number of Native customers, and 12% purchased products from a larger number of Native businesses. 50% did not experience any of the above. This indicates that there may have been a slight overall increase in Native supply chain activity during the pandemic.

Out of 34 respondents, 59% of businesses were negatively impacted by the pandemic, 26% of businesses were positively impacted by the pandemic, and 15% of businesses were not impacted by the pandemic. When asked whether they experienced any of the following during the pandemic, 31 respondents answered as follows: 58% loss of revenue, 55% increased expenses, 42% couldn't access necessary supplies/inputs, 39% increase in revenue, 39% wanted to hire employees but couldn't find any, 26% couldn't access distribution infrastructure, 26% temporarily closed their business, 19% fired or laid off employees, 19% hired employees, 16% couldn't access processing infrastructure, 6% decreased expenses, and 3% went out of business. Many of these impacts were discussed by interview and focus group participants and are covered in subsequent sections.

Respondents experienced varied shifts in market demand. Out of 32 respondents, 34% experienced a sustained increase in market demand, 34% found that market demand fluctuated throughout the pandemic, 13% said market demand spiked at the beginning of the pandemic and then declined, 9% experienced a sustained decrease in market demand, and 9% said market demand decreased at the beginning of the pandemic and then recovered.

Many respondents accessed pandemic relief funding, and overall this funding made a positive impact on businesses. Out of 35 respondents, 60% accessed pandemic relief funding for their business. 14% did not access relief funding because their business was not eligible, 6% applied for relief funding but did not receive any, 11% were eligible for funding but chose not to apply, 3% did not know how to apply for relief funding, and 6% were not aware of the funding opportunities. Out of the 21 respondents who accessed relief funding, 52% said it made a significant positive impact on their business, 14% said it made a moderate positive impact, 29% said it made a small positive impact, and 5% said it made a negative impact (when asked to explain the negative impact, this respondent said "lack of normal income").

Respondents were also asked to answer "How well is your business doing right now?" on a scale of 0 to 10, 0 being "very rough, struggling" and 10 being "very well, flourishing". 32 respondents answered. On the lower end of the spectrum, 6% ranked their businesses at a 0, 3% selected 1, and 3% selected 3. In the middle of the spectrum, 16% of respondents ranked their businesses at a 5. On the moderately positive end of the scale, 19% selected 6 and 25% selected 7. On the highest end of the spectrum, 19% selected 8 and 9% ranked their businesses at a 9. This data suggests that while the majority of businesses are doing either neutral or better than neutral, a small proportion of respondents are experiencing severe difficulties with their businesses right now. The large proportion of respondents near the middle of the spectrum indicates that there is room for growth in these businesses. Still, a small proportion of businesses are currently flourishing.

Additional survey data is provided throughout this report and in the appendix.¹⁵⁵

i. Difficulty Procuring Operational Supplies

International supply chain disruptions made it difficult for some Native food businesses to obtain operational supplies such as glass jars, to-go containers, cups, paper goods, bags, packaging, disposable gloves, sanitation supplies, and masks. In some cases, these shortages impacted businesses' abilities to operate. For example, the Osage Nation's meat processing plant was built during the pandemic; it opened two months behind schedule due to a delay in receiving steel rails for hanging carcasses. Some supply chain issues continued well into the pandemic. For example, in October 2021 Twisted Cedar Wines was unable to purchase the glass wine bottles and label paper necessary to bottle their products. They also experienced a significant increase in pallet prices, and had to absorb these costs. Native supply chains are intertwined with global ones, and are affected by disruptions in the availability of operational supplies.

ii. Safety Protocols

Native food businesses worked to protect their employees via safety protocols.¹⁵⁶ For example, Gila River Farms continued operating throughout the pandemic; they enforced safety practices and provided paid leave, testing, and PPE. General manager Stephanie Saucedo-Manuel explained:

The Gila River Indian Community did a really good job in providing their entities the opportunity to test their employees every two weeks. We have about 55 employees, so those that got sick or came into contact, we paid them to be out. We really took care of our employees, and the community really took care of everybody within the community, because not only for the entities but for the residents within the community, they offered the testing and the shots. [...] Kudos to our community government because they're the ones that stepped up and said "Ok, this is what we're going to do."¹⁵⁷

Many Native nations supported businesses within their borders through their handling of the pandemic.

iii. Changes to Market Dynamics

One of the most prominent ways the pandemic impacted Native food supply chains is through changing market dynamics. Native food businesses reported both upstream and downstream supply chain shifts, and both increased and decreased customer demand. These shifts had complex positive and negative effects on food businesses. Some businesses also encountered barriers to fulfilling market demand, such as disruptions in production and issues with shipping and distribution.

a. Spike in Demand for Local Food

In response to national food supply chain disruptions, customers turned to local food producers. Many small scale Native-owned farms and ranches saw a spike in demand for local meat and vegetables. Jen Falck, owner of Kahulahele Farmstead, saw increased sales which benefited her business:

¹⁵⁵ Additional survey data provided in the appendix includes: open-ended responses about negative and positive impacts of the pandemic, ways that businesses adapted to the pandemic, and amounts of revenue lost/gained.

¹⁵⁶ Safety protocols did negatively impact some farmers, for example, Yawelyahsi•yó• Farm is located on an incubator farm, and they could not have volunteer workers due to safety policies. They worked sun up to sun down for 6 to 8 weeks to compensate, which took a toll on their bodies and mental health. A survey participant also said the "Pandemic stifled product distribution efforts as well as essential volunteers for harvesting and processing products."

¹⁵⁷ Zoom Interview with Stephanie Saucedo-Manuel, General Manager, Gila River Farms (Oct. 28, 2021).



Piglet at Birds N Things Farm. Photo courtesy of Daisy Perez-Defoe and Rusty Defoe, owners of Birds N Things Farm.

We got our upstart a few months before COVID began. But I think actually because we're small scale and we're providing to this small community, COVID put a lot of people into sort of survival mode, and suddenly driving to the neighbor's down the road to get your eggs didn't seem so strange. And so in that light it was helpful for us. Of course, this whole thing has been terrible, but peoples' mindset and their food and where they're getting their food, and their supporting their local communities I think has increased.¹⁵⁸

Similarly, Kassandra Dickerson, owner of Mountain Lake Cattle, described a huge spike in demand for local meat as people turned to small-scale processors:

So when it happened it took a couple months for people to realize like "hey, there could be a food shortage." [...] But they went almost into a panicked mode. I was getting calls left and right. [...] Usually I was selling maybe 30 to 40 steers a year, and I had sold 55 steers in 3 months. [...] I was like "oh my god, what do I do?" So I started culling the herd hard, I went from a big herd back down to a smaller one. I butchered most of my replacement heifers and tried to meet demand.¹⁵⁹

Kassandra was selling cow-calf pairs for almost double their pre-pandemic price, and culling the herd enabled her to pay off debt, purchase hay, and refresh the herd's genetics. However, she would now like to rebuild the herd. Daisy Perez-Defoe and Rusty Defoe, owners of Birds N Things Farm, also saw increased demand:

Rusty: During the pandemic there were a lot of people going to small farmers, and we didn't have product at the moment. We had animals that were alive, but they weren't ready to be processed [...]. [Customers] just kept on going towards smaller farmers, and there was a lack of industrial meat.

¹⁵⁸ Zoom Focus Group Interview with Jen Falck, Owner, Kahulalehe Farmstead (Feb. 3, 2022).

¹⁵⁹ Phone Interview with Kassandra Dickerson, Owner, Mountain Lake Cattle (Oct. 27, 2021).

Daisy: [...] Over 150 people reached out to us at that point for pork, I have all of those contacts and we've sold the piglets. [...] I have a list of at least 400 people that want chicken and want them consistently. So I have that list to draw upon next year. COVID [...] helped the local producer reach a market that might not have been there. That food shortage in the marketplaces made everybody realize "hey, I should get a hold of a local farmer and make sure that they know my name and they can call me for the next set of meat."¹⁶⁰

Daisy and Rusty decided not to process animals early to meet increased demand, but they established relationships with potential customers who they contacted when the animals were ready. Vegetable farmers reported similar trends, for example Yawelyahsi•yó• Farm easily sold all of their CSA shares during the pandemic. Some producers also saw increased interest in healthy foods. Brigette McConville of Salmon King Fisheries described increased demand for salmon, saying "Our largest positive out of COVID was everybody who bought our fish had the intention of trying to be healthier. [...] It's kind of hard to say that it was a marketing tool, but it was, you know [...]."¹⁶¹ Overall, customers' increased interest in local purchasing benefited some smaller scale Native food producers.

b. Loss of Restaurant Sales

Restaurant closures created significant pandemic market shifts. Native-owned restaurants were directly impacted, and some larger scale Native-owned food production businesses described a loss of restaurant sales which necessitated a shift to other sales channels. Native-owned fisheries reported decreased direct sales to restaurants and decreased wholesale sales. Rudy Madrigal, owner of Coast Salish Seafood, explained, "We had a bunch of our buyers and a bunch of places that right in the middle of the pandemic said 'Hey, we can't buy anymore, the restaurants aren't taking it, nobody's taking it.' That was the rough part."¹⁶² ¹⁶³ Fortunately, prices for seafood later skyrocketed, and Rudy made more money than usual. Izetta Thompson said Naknek Family Fisheries also lost sales when the restaurant she was selling to closed, and market recovery was unstable, with a brief increase in online sales followed by a slump. Buck Jones, CRITFC's salmon marketer, said that prior to the pandemic there had been more restaurant demand than their member fishers could fill. The pandemic shift to retail and grocery decreased wholesale demand, leaving fishers with a surplus of fish. Buck explained, "Usually that market would be open and we actually couldn't catch enough fish to fulfill those markets, but that year it changed, so that was really hurtful for the fishery overall."¹⁶⁴ Some fisheries saw increased sales when restaurants reopened—Buck found that markets improved in 2021, and a tribally-owned fishery in Wisconsin said their business is growing due to increased restaurant demand.

Native-owned value-added product companies also lost restaurant sales. A tribally-owned olive oil company in California lost about half of their sales when restaurants shut down, but were able to shift to the retail channel as demand from grocery stores increased. They explained, "48% of our business is to restaurants. So within two weeks of the shutdown, all that business was gone, dried up. So we had to adapt [...]. Being diversified in our sales channels was beneficial to us during the pandemic because we were able to shift volume from one channel to another."¹⁶⁵ Similarly, prior to the pandemic 60% of Twisted Cedar Wines' sales were on-premise at restaurants. When they lost these sales they switched their focus to larger in-store accounts and direct to consumer online sales. Having multiple sales channels increased these businesses' resilience.

¹⁶⁰ Phone Interview with Daisy Perez-Defoe and Rusty Defoe, Owners, Birds N Things Farm (Oct. 21, 2021).

¹⁶¹ Zoom Focus Group Interview with Brigette McConville, Owner, Salmon King Fisheries (Jan. 27, 2022).

¹⁶² Phone Interview with Rudy Madrigal, Owner, Coast Salish Seafood (Nov. 10, 2021).

¹⁶³ After this initial drop-off in business, Rudy, who is typically backed by a larger tribally-owned seafood company, instead had to put up his own money to pay his crews and restart operations.

¹⁶⁴ Zoom Focus Group Interview with Buck Jones, Salmon Marketing Specialist, Columbia River Inter-tribal Fish Commission (Jan. 27, 2022).

¹⁶⁵ Zoom Focus Group Interview with anonymous (Feb. 3rd, 2022).

c. Global Market Shifts

Many Native food producers sell to global markets which also saw shifts in demand. Some market shifts overseas occurred at different times than in the US. For example, a tribally-owned fish and seafood enterprise in Washington sells their geoduck in China, and had to navigate local pandemic dynamics that were out of alignment with their market:

At the beginning when the pandemic started, and the whole tribal government shut down, and everybody was out at stay-at-home leave, the geoduck industry didn't shut down. [...] So when everybody's at home, we had to try to figure out how do we get crews out there, how do we get the boats out there and keep everybody safe. [...] [The market is] based in China. So when the pandemic first hit, it started there. So that's where we saw our initial slowdown, was while everything here was still normal. And as we started to see cases pop up in the US, they were starting to bounce back.¹⁶⁶

Global demand shifts impacted businesses' markets, and the staggered timing of these shifts made navigating safety protocols more complex.

d. Market Uncertainty Interrupted Growth Trajectories

Ongoing pandemic market fluctuations interrupted trajectories of growth for some Native businesses. For example, prior to the pandemic Rudy Madrigal had been building an inventory of smoked, canned, and frozen fish so that he could secure his own customers in the future, rather than operating solely as a middle man in the fish supply chain. He planned to sell some of this product during the Chinese New Year, but when the pandemic hit he donated this fish to the Navajo Nation instead, and stopped building inventory. While Rudy's sales actually increased after the initial shock of restaurants closing subsided, Rudy was hesitant to invest in inventory because of market instability:

I was scared. Everything from the pandemic, business just completely changed. You have people who don't want to buy from the side street vendor, then you have the other people who are trying to eat healthy so those guys are coming out, so it's like a win win lose. [...] This was the biggest year that I've ever had, but I was still scared, because of the pandemic, to go take my own money and go buy 20 or 30 thousand pounds worth of fish, and put it in the freezers. To have the markets, on the news they're telling us that there's going to be shortages or food supply issues, or there's going to be another outbreak. You get scared that people aren't going to work, and to spend that kind of money, 60 or 70 thousand dollars and then to have it processed and not know what the end [market] is, that's where the pandemic has really put a damper.¹⁶⁷

Pandemic market uncertainty dampened growth and created "win/lose" situations for many businesses.

e. Positive Impact of Websites

Generally, Native food businesses that had websites in place prior to the pandemic fared better than businesses without websites, particularly if their site had a solid mechanism for online sales. Many businesses also adapted by creating a website, or expanding the functionality of their existing website. During the pandemic websites increased market opportunities and facilitated direct to consumer (DTC) sales. Rancher Cassandra Dickerson explained:

I honestly didn't have hardly any online sales [before the pandemic]. I think that I may have sold 4 steers the year prior from online or an email. And as soon as the pandemic hit, 99% of them were online. [...] It changed 180 from what I was doing. Normally I'd get a phone call, or somebody would see me out in town and be like "hey, I need a beef!" and I'd be like "ok, here you go!" Now I don't even see half these people [...]. But it kind of opened it up to where I had that influx of business [...]. And the emails just pour in. [...] It's constant, that website's amazing, everybody can find me, it's easy, it definitely helped.¹⁶⁸

¹⁶⁶ Zoom Focus Group Interview with anonymous (Jan. 27, 2022).

¹⁶⁷ Phone Interview with Rudy Madrigal, Owner, Coast Salish Seafood (Nov. 10, 2021).

¹⁶⁸ Phone Interview with Cassandra Dickerson, Owner, Mountain Lake Cattle (Oct. 27, 2021).

Buck Jones, CRITFC's salmon marketer, stated that their member fishers who had a system set up for online sales and delivery flourished during the pandemic. For example, Brigette McConville of Salmon King Fisheries used online sales and social media marketing to adapt:

That turned into a whole market in itself, is neighborhood marketing. I have a 1250 tote that I put on one of my pickups and then take it to a community and everybody in the neighborhood comes and buys a fish. [...] That got spread out through social media. Instagram and Facebook are free marketing, combined with all our social medias we have over 14,000 followers. So that's a marketing tool in itself with COVID. So it grew into, when our tribe was shut down, and we shut down three times completely, [...] my landlord said you can do pickup, so people would buy online. Thank goodness for PayPal and Venmo and CashApp and Facebook Pay, they just pay and then I go into the store and get their orders ready, and they just pick it up outside. [...] [COVID] made us have some creative thinking on how we're trying to market the fish.¹⁶⁹

A tribally-owned olive oil company also benefited from their online platform during the pandemic:

When the shutdown happened, we were lucky to have a solid e-commerce platform [...]. So we saw our e-commerce sales skyrocket. Like, almost tripled within a few months. [...] And having the ability to sell those online and having a staff person who was able to package all that product and ship all that product was really important for us to keep up with demand.¹⁷⁰

Websites allowed Native food businesses to adapt by supporting marketing and facilitating DTC sales. Overall, Native food producers adapted to pandemic market shifts by changing market channels.

iv. Food Service Adaptations

Many restaurants struggled to stay afloat during the pandemic. At the same time, others flourished—for example, Watecha Bowl started their business during the pandemic and did well because, as a food truck, their outdoor, to-go format worked with COVID restrictions. Many restaurants adapted by changing where and how they serve food. For example, Ben and Debbie Sandoval shared that Tiwa Kitchen Restaurant, which has been a sit-down restaurant for the last 30 years, has been building a drive through:

Debbie: Now we're in the process of building a drive up, for our people. Because our governor hasn't opened up the Pueblo yet. And he's not allowing customers in. [...] We haven't been open, and we haven't been doing any business hardly except catering. And then we're just working on remodeling our business in a way to suit the COVID.

Ben: [...] I don't know how to operate the drive up yet. [laughs] [...] So we're like going in deep water and we don't know where we're going on it!¹⁷¹

Like Tiwa Kitchen, many Native-owned restaurants switched to catering during the pandemic, although demand varied. Some businesses had a steady trickle of orders, while others saw fluctuations. For example, Tocabe: An American Indian Eatery typically catered large events prior to the pandemic; these orders stopped when people weren't gathering. Gatherings Cafe created a meal delivery program for Indigenous elders in the Minneapolis area and offered limited catering orders for pickup, particularly to local Native organizations. While the cafe provided an invaluable service to their community, they did not flourish during the pandemic, and were temporarily closed at the time of our interview.

¹⁶⁹ Zoom Focus Group Interview with Brigette McConville, Owner, Salmon King Fisheries (Jan. 27, 2022).

¹⁷⁰ Zoom Focus Group Interview with anonymous (Feb. 3rd, 2022).

¹⁷¹ Phone Interview with Debbie and Ben Sandoval, Owners, Tiwa Kitchen Restaurant and Bakery (Sep. 16, 2021).

Chef Ray Naranjo's "Migration of a Duck", a meal served as a part of the Pante Project. Photo courtesy of Ray Naranjo, former executive chef of Indian Pueblo Kitchen and owner of Manko LLC.



Restaurants also adapted through hosting special events. When Indian Pueblo Kitchen initially shut down, former executive chef Ray Naranjo launched the Pante Project, a series of monthly events where customers could order a prepared meal online, pick it up the day of the event, and attend an online session that provided cultural education and showed how the meal was prepared. The meals were designed around Pueblo cosmologies. Ray explained:

The Pante Project, it's based off of ancestral oral history knowledge, that specifically is a corn model of colors that correlate with directions. This would be used in prayer. So it was essentially like a prayer to help with the situation that we're in. So for example, the color corn, blue is the north color, so I took flavors of the Indigenous north area region, and I did a meal based off of that. Then we went counterclockwise to the west, which is yellow, and we did a dish off of foods that would be west of the Pueblos. [...] The last one we did was the direction up [...]. The dish was called "the migration of a duck", so it takes us from one end through the up direction, in our language we refer to that as the heavens, so it would go through the heavens and then it would land at its destination. So my representation was in that way, but also it was based off of the actual migration, so we took foods from Mexico, and then I took foods from the Great Lakes area. So they got two duck breasts and one had flavors of this, and the other had flavors of that region. [...] [The project] started off with, it might have been as low as 30 dinners for the first one and by the last direction we were over 300. [...] It was such a success, it went way beyond expectation.¹⁷²

After the restaurant reopened, they reimagined the Pante Project as a series of wine dinners with Indigenous guest chefs from across the country, focused on regional ingredients. These dinners garnered extensive media attention and sold out well in advance. The restaurant itself also flourished after reopening,¹⁷³ and was able to provide monetary support to the Pueblo Relief Fund.

Other food service businesses adapted by selling shelf-stable products online. Tocabe: An American Indian Eatery moved forward with a business expansion they had been planning prior to the pandemic, but which acquired new urgency in the pandemic circumstances—they launched an online Indigenous Marketplace which sells pantry staples sourced from Native farmers, harvesters, and ranchers, designed to build Native food supply chains and distribute Native-produced foods to consumers nationwide. And Valene Hatathlie, owner of Val's Frybread mobile food stand, adapted by selling fry bread mixes online; the business was so successful that she continued even after reopening her food stand.

¹⁷² Phone Interview with Ray Naranjo, former Executive Chef, Indian Pueblo Kitchen (Sep. 21, 2021).

¹⁷³ Ray attributed this to their location in Albuquerque.

v. Closed Borders Affected Food Distribution

In some cases, national border closures impacted food distribution. A tribally-owned fishery in Wisconsin said it was difficult to reach their Canadian customers during the pandemic because distributors were not allowed to cross the border. In January 2022 this was still an issue for the fishery—because US trucking companies could not cross, they were working with Canadian companies instead. Some Native nations also closed their borders to protect their citizens, which affected the flow of food products across reservation lines. For example, Ben Jacobs and Matt Chandra purchased cornmeal from the Ute Mountain Ute's Bow and Arrow Brand for their online Indigenous Marketplace. To work around the reservation's closed borders, a representative of the enterprise met the delivery driver Ben and Matt hired at the Ute Mountain Travel Center to transfer the cornmeal. Another Native chef shared that she was required to have a police escort to buy food from Santa Ana Pueblo. While people worked together to keep Native supply chains moving while respecting Native nations' pandemic restrictions, these dynamics shaped how Native-produced foods could be distributed.

vi. Land Loss to Development

The pandemic created dynamics that accelerated the loss of agricultural land in some regions. Cassandra Dickerson explained the trends in her region in northern California:

Because the pandemic allowed people to work from home over their computer, we got a huge influx of people buying properties up here. [...] As soon as people could work from home, they moved farther away from the cities. So they were purchasing a bunch of land that I was renting. [...] Now I'm renting this lady's front yard because she's old and loves the cows.¹⁷⁴

The loss of agricultural lands to housing put further stress on ranchers who were already struggling to find leasable pastures prior to the pandemic. Land loss also caused an increase in hay prices. Cassandra explained that many hay farmers in her region sold their land to developers:

They got offered more for their land from developers than they would make haying their entire lifetime. One of my really good friends, his dad just sold his 600 acre farm here in the North Valley, he made like 30 million dollars. And he was grossing about \$200,000 a year prior to that, by selling hay. [...] There goes all your hay for everybody. 600 acres fed my cows probably 6 times over every year, so six other ranchers about my size lost all their feed. So we're purchasing feed from way up north or in Oregon, Nevada even, sometimes Utah. [...] That wasn't the only one that happened, there were tons of them.¹⁷⁵

Loss of agricultural land and rising feed costs will likely continue to be issues as norms around remote work shift in ways that shape development in rural and suburban areas.

vii. Difficulty Accessing Meat Processing

Accessing meat processing was difficult in many parts of Indian Country prior to the pandemic, and the pandemic created significant disruptions in national meat supply chains that further limited access to meat processing across the US. It is widely acknowledged that the pandemic exacerbated existing inequities in processing access for Native meat producers. Native ranchers stated that decreased access to processing was one of the most prominent ways the pandemic impacted their supply chains.¹⁷⁶ Many ranchers drive several hours to reach processing, and during the pandemic all the processors in their regions were fully booked out anywhere from 6 months to two years. A rancher in Oklahoma explained:

¹⁷⁴ Phone Interview with Cassandra Dickerson, Owner, Mountain Lake Cattle (Oct. 27, 2021).

¹⁷⁵ Phone Interview with Cassandra Dickerson, Owner, Mountain Lake Cattle (Oct. 27, 2021).

¹⁷⁶ This is a significant issue not only because this prevented ranchers from bringing their products to market, but also because cattle need to be butchered at a specific age. Waiting past that age results in loss of revenue, and in cases where cattle become older than 30 months the USDA requires that all of the animal's bones be removed during processing, which limits the cuts of meat that can be sold from the animal.

So I feel like here in Oklahoma, especially when the pandemic hit, the major obstacle was just finding processing facilities. I feel like everybody's attention went towards purchasing regional foods, to kind of rebuild just a weakness in our supply chain. [...] And so all of our local processors just got swamped here in Oklahoma. They were booked out for 18 months to 2 years some of them. And at some point then USDA started offering a lot of grants for processing facilities. And so then you see them starting to pop up.¹⁷⁷

Mitch Albright, the Director of Agriculture for the Quapaw Nation, said that the Quapaw Nation's processing plant also had people booking animals out 2 years in advance. Daisy Perez-Defoe and Rusty Defoe, owners of Birds N Things Farm, encountered similar issues:

We had to book six months in advance, and even then, I've had some processors call and say "hey, we need to cancel because of staff shortages". Somebody has COVID or got exposed to COVID and now they have to shut down for quarantine. And that puts a strain on the whole system as well.¹⁷⁸

Ranchers utilized a variety of workarounds. Cassandra Dickerson also found that processors in her region were booked a year or two out; she had animals ready to process and a long waiting list of customers who had run out of meat. Cassandra began using small local butchers' facilities to process the animals herself and sell them custom exempt.¹⁷⁹ Cassandra also obtained a loan through a Native CDFI in South Dakota to open her own butcher shop, which will expand access to processing in her region and provide meat to local residents. Daisy and Rusty also want to build a processing facility on their farm to address the lack of local infrastructure and benefit their community, but they have not yet found funding.

viii. Tribes and Individuals Spent COVID Relief Money on Food Sovereignty

a. Funding Food Supply Chain Infrastructure

Many Native nations used the funds they received via the CARES Act and the American Rescue Plan Act to address inequities in Native food systems and invest in infrastructure to strengthen Native food supply chains and food sovereignty. Nico Albert of Burning Cedar Indigenous foods explained:

So supply chain wise, it's been great having that relief fund to invest into all of these tribal businesses. Because that's what everyone is doing with that money, is building those operations [...], it's all growing because of that capital investment that came from the government. It's a very unfortunate way that we came about this capital, through huge, huge, devastating loss in the Indian community, because we were hit hardest out of any community in North America. Our communities were the ones that didn't have as much access to clean water or access to healthy foods and health care. [...] We've always known those problems were there, we've always needed to address them, but now it's kind of taken this catastrophe for us to finally get the resources that we need to make those improvements.¹⁸⁰

One aspect of this was building essential food processing and distribution infrastructure. For example, both the Cherokee Nation and the Osage Nation built their own meat processing plants using CARES act funding, and the Osage Nation built a 40,000 square foot greenhouse to grow vegetables. Nico spoke about the impact of the Cherokee Nation's investment:

Now we are able to take our own herds of cattle and bison and pigs [...] and they have the facilities now to process their own meats. And sell directly to or provide directly to our people and institutions. [...] We are providing for our own people, we don't have to worry about the outside world's supply chains because we've got us. And it keeps the costs low for people.¹⁸¹

¹⁷⁷ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

¹⁷⁸ Phone Interview with Daisy Perez-Defoe and Rusty Defoe, Owners, Birds N Things Farm (Oct. 21, 2021).

¹⁷⁹ Cassandra has extensive experience with hunting and processing animals in the field.

¹⁸⁰ Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).

¹⁸¹ Zoom Interview with Joe Thompson, former General Manager and Plant Manager, Butcher House Meats (Nov. 16, 2021).

The fact that many Native nations chose to invest in Native food supply chains demonstrates that this is an important priority for many in Indian Country.

b. Funding Food Purchasing for Community Distribution, which Increased Demand for Native Foods

Many Native nations, individuals, and businesses used COVID relief money to purchase Native foods to distribute to their communities, for example via tribal food boxes and meal programs for Indigenous elders. This resulted in a notable increase in demand for Native-produced foods.¹⁸² Native food producers described Native customers' interest in purchasing traditional foods in particular. For example, a representative of a tribally-owned farm in New Mexico shared that their tribal members returned to traditional foods during the pandemic, saying "Our grandmothers, even some of the family went back to that traditional food, and we were here for them, a lot of the tribes were here for them, and we had that for them. And right now they're starting to buy more and more, and we want that to be really recognized."¹⁸³ While this enterprise also sold non-Indigenous foods to other tribes during the pandemic, they emphasized that "the traditional food was really the biggest thing that everybody wanted. Going back to that value of traditional."¹⁸⁴ The spike in demand highlighted the need to increase the available supply of traditional and Native-produced foods. Vanessa Casillas, the former business manager of Gatherings Cafe, found that over time it became more difficult to source from Native food producers, as many organizations were using their relief funding to purchase these foods:

One of the things we did for part of the elders' meal program is I was able to curate some holiday boxes [...]. I wasn't able to use all Indigenous ingredients, because also by that time, November 2020, as I'm ordering in October-ish, [...] that was at the time where we were getting a lot of the COVID relief monies. And there were several people doing what I was doing. So it seemed like it was starting to exhaust the supply. Not that there hadn't been enough, but we were all taking it up and getting it out to people. [...]

¹⁸² Native-produced foods can be expensive, and many Native communities experience structural inequities that can make it difficult for people to afford these prices. Native entities used COVID relief funding to bridge this gap and make Native foods accessible to more Native people.

¹⁸³ Zoom Focus Group Interview with anonymous (Feb. 3rd, 2022).

¹⁸⁴ Zoom Focus Group Interview with anonymous (Feb. 3rd, 2022).



Maple syrup produced by Birds N Things Farm. Photo courtesy of Daisy Perez-Defoe and Rusty Defoe, owners of Birds N Things Farm.

At that time sourcing directly from Indigenous vendors was growing increasingly hard because it seemed like they were out of product.¹⁸⁵

Native producers shared similar experiences. Spring Alaska Schreiner, owner of Sakari Farms, explained:

What happened I saw is that there was an increase in demand for our tribal food products. The CARES act and a lot of federal funding was paying tribal members to give food out to our people. So it's a win-win for a business like mine [...] or any of the tribal producers here, because we were getting federal money to feed our people. So when that runs out, what do we do then? [...] How do we keep that flow going?¹⁸⁶

It is important to establish ongoing funding streams to continue channeling Native food into Native communities as COVID relief funds run out, and to invest directly in Native food producers to build their production capacity to meet increased demand. Jen Falck, owner of Kahulahele Farmstead, explained:

Mostly because of COVID, there's all this funding that people want to buy food and put in boxes and get out to communities, and there aren't enough farmers. And so we need large scale distributors or co ops, [...] and access to that capital. Because now I know that the feds are going to fund a lot of food purchasing,¹⁸⁷ but I don't have the infrastructure to handle it. So it's kind of a little bit the cart before the horse. So there's a whole bunch of money to buy food, but there aren't enough people or dollars to produce the food.¹⁸⁸

The infusion of pandemic relief funding facilitated increased Native supply chain activity and increased demand for Native foods. There is a strong desire to support Native food supply chains in Indian Country; when funding is available, Native people are choosing to invest it into Native food systems.

ix. Supply Chain Relationships were Positively and Negatively Impacted

The pandemic both positively and negatively impacted Native food supply chain relationships. Some Native nations and people turned to Native supply chains to address national supply chain gaps, and some businesses built more connections with other Native enterprises. Ben Jacobs and Matt Chandra, co-owners of Tocabe: An American Indian Eatery, expanded existing relationships and built new ones to source food from Native producers for their online Indigenous Marketplace. Vanessa Casillas built new relationships to source ingredients for Gatherings Cafe's elder meal program. And a tribally-owned farm in New Mexico focused on growing relationships and sold more food to other tribes during the pandemic:

I think what really helped our operation during this time especially was just making direct contact with some of the local tribes that we have surrounding [our] nation, working with them, and providing what we can offer to them at a wholesale price. And working out the logistics and ensuring that their tribe also has some support. We have our own flour mill and we produce [...] flour that went out to even our tribe and also surrounding tribes as well, to help them during this pandemic. Including our dry beans as well and also our potatoes.¹⁸⁹

This enterprise also built mutual trade relationships with tribes who sold fresh produce. For others, the pandemic made it more difficult to build relationships. For example, Spring Alaska Schreiner wants to partner with other Native farmers to provide larger quantities of food to buyers via a cooperative model. The pandemic made it difficult to travel to locate and connect with Native food producers in her region.

¹⁸⁵ Phone Interview with Vanessa Casillas, former Business Manager, Gatherings Cafe (Oct. 19, 2021).

¹⁸⁶ Zoom Focus Group Interview with Spring Alaska Schreiner, Owner, Sakari Farms (Feb. 3, 2022).

¹⁸⁷ One program that Jen is referring to here is the Local Food Purchase Assistance Cooperative Agreement Program.

¹⁸⁸ Zoom Focus Group Interview with Jen Falck, Owner, Kahulahele Farmstead (Feb. 3, 2022).

¹⁸⁹ Zoom Focus Group Interview with anonymous (Feb. 3rd, 2022).

Spring explained, “I wish I could partner with more people. [...] It’s been harder with COVID, you can’t even get up on the res right now, everyone’s passing away.”¹⁹⁰ Another producer said the pandemic negatively impacted their farm’s global business relationships by preventing travel to trade/food shows.

x. People Reoriented their Lives Towards Prioritizing Native Food Systems Work

Many people lost employment during the pandemic, particularly those in the restaurant industry. However, unemployment benefits and pandemic relief funding gave some people space to shift careers towards further prioritizing Native food systems work. For example, prior to the pandemic Nico Albert was the executive chef at Duet Restaurant and Jazz Club, and she did consulting on the side:

I was doing cultural work as I guess a side hustle. [...] So people would always hit me up for whatever event they had, or if they wanted somebody to speak about Indigenous food or teach how to make certain things, or talk about food sovereignty. They would come to me and I would do that on the side in the very little spare time I had while also running a restaurant. It was a lot, but I always tried to find time to do those requests, because that’s what I really love.¹⁹¹

During the pandemic Nico lost her job at Duet Restaurant. Unemployment benefits gave her financial space to start her catering and consulting business, Burning Cedar Indigenous Foods, where she utilizes her Native food systems expertise full time. Nico described the positive impact of this shift:

I’m very very fortunate and blessed and thankful that so far I’ve been able to find enough work in my business to be able to support myself. [...] I’m really really enjoying what I’m doing right now. [...] [I get to] wake up in the morning and come and teach these people how to make traditional Native American food and how to be proud of the food that they’re making, and how to contribute to the health of their community [...]. And it all just comes full circle that I’m healthier and they’re healthier and the citizens of Tahlequah are healthier. It’s good work and it makes me feel good which is also good for me spiritually. To be able to do work that makes me feel good instead of just slinging out fine dining meals for people who may not appreciate it.¹⁹²

Nico shared that many of her personal contacts have reoriented their professional lives in similar ways:

And I’ve seen businesses crop up; I think I’m not the only one who took that state of quarantine as a time to really make a decision to go full steam ahead and commit ourselves more toward that goal of restoring our traditional foodways, restoring the health of our people through this work. There’s so many people I’ve heard of that were like, “you know what, screw this restaurant business” or “I’m going to go out on my own, I’m going to take this opportunity to really follow that dream of being able to do something for my community and support myself doing it.”¹⁹³

Daisy Perez-Defoe and Rusty Defoe, owners of Birds N Things Farm, shared similar comments:

Daisy: COVID made us focus on what’s really important. [...] which is the family, producing good food, and being in the present without having to juggle a hectic life.

Rusty: COVID kind of changed it for the better. It helped push us in the right direction a little bit.

Daisy: With the farm specifically. There’s a million ways a farmer can make a living at the farm, we just have to focus on it a little bit more. [...] Which is what COVID did for us, it made us focus more on how and why and where we were going to be doing this farming.¹⁹⁴

¹⁹⁰ Zoom Focus Group Interview with Spring Alaska Schreiner, Owner, Sakari Farms (Feb. 3, 2022).

¹⁹¹ Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).

¹⁹² Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).

¹⁹³ Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).

¹⁹⁴ Phone Interview with Daisy Perez-Defoe and Rusty Defoe, Owners, Birds N Things Farm (Oct. 21, 2021).

Many people experienced tremendous personal and professional difficulties during the pandemic. However, it also created circumstances that allowed some people to reorient their careers to devote more time and attention to building up Native food systems and supporting the wellbeing of their communities.

xi. This was not Native Peoples' First Pandemic

While Native communities experienced profound and disproportionate losses during the pandemic due to systemic inequities, research participants emphasized that Native people have survived previous pandemics and other hardships. Ben and Debbie Sandoval, owners of Tiwa Kitchen Restaurant, said the pandemic is not the worst hardship their restaurant has been through,¹⁹⁵ and that Pueblo people have survived worse pandemics. Nico Albert also emphasized this point:

It speaks to Indigenous people as a whole, you know, we are survivors, we've been resilient and surviving this whole time and waiting for opportunities to do what we know needs to be done. [...] And so every opportunity we get we're going to move it further in the direction that we know is the right direction. We're just going to work toward reuniting our people with our ways. Just getting closer and closer to what is the healthiest and best way for us to be. We're kind of the originals at taking a really shitty situation and making the best of it. So COVID, we're equipped for that. We're going to lose people in our communities and we have to grieve for that, but we're going to try to make the best of those losses, it won't be for nothing. [...] This ain't our first pandemic, you know, this ain't our first rodeo, this ain't our first epidemic health crisis. We've been through that before, the crisis of colonization that's ongoing, smallpox, polio, we survived through all of that and COVID is the same. We're going to survive through that and use it as a catalyst to do better and better things for our communities.¹⁹⁶

The pandemic has served as a catalyst for Native people to do beneficial food systems work both within and beyond Indian Country.

¹⁹⁵ Tiwa Kitchen Restaurant also experienced difficult times after 9/11 when tourism decreased dramatically, and on an occasion when a local fire kept tourists out of their region.

¹⁹⁶ Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).

INDIGENOUS VALUES IN NATIVE FOOD BUSINESSES

Native food systems participants are motivated by their personal perspectives, values, and goals for their businesses. However, a common theme is that they are incorporating Indigenous values into their business practices, in ways that are appropriate to their relationships and that often draw from knowledge systems that are specific to their tribe(s). Indigenous values can be a central motivation for starting a food business, and are guiding forces that shape businesses' day to day operations.

Indigenous values can shape how Native food producers engage with plants and animals. Lucas Humblet, co-owner of Yawelyahsi•yó• Farm, uses Indigenous values to make decisions about farm management and to maintain good relationships with the plants. For example, Lucas and his partner are seed keepers and grow many varieties of corn, so they initially hand pollinated the plants to prevent cross pollination. However, they realized this practice was not supporting a good relationship. Lucas explained:

Hand pollination is definitely very efficient in terms of keeping cross pollination out. But that is very invasive to the plants, to the corn. I've done hand pollination where you bag the tassels and you bag the silks. But you have to make some certain cuts and you have to bag it up and keep it out from breathing the fresh air, the fresh wind, and things like that. And some of the corn really told us that they did not like that. Some of them spit their pollen at us, right in our faces, and we'd get little scratches on our arms from the leaves, so they were telling us "Hey, we don't want to be grown like this, we don't want to have this type of relationship." After that we were like "ok, no more hand pollination" so we just let them open pollinate at that point. [...]



Spring Alaska Schreiner in a high tunnel at Sakari Farms. Photo courtesy of Spring Alaska Schreiner, owner of Sakari Farms.

[The corn plants] are telling us different ways on how we can keep them true to their varieties while maintaining a healthy relationship with them. That's how it's supposed to be I think, it's supposed to be living in harmony with them and not fighting against them, forcing them to do what you want to do.¹⁹⁷

Instead of hand pollinating, Lucas and his partner now separate the corn plants with borders of popcorn and sorghum, plant with staggered timing to work with the natural differences in when each corn variety matures, and hand select seeds to save that were not cross pollinated. Lucas also enacts Indigenous values by using sustainable practices such as cover cropping, mowing instead of weeding, and not using plastic. Daisy Perez-Defoe and Rusty Defoe also use Indigenous knowledge to steward land and care for animals on Birds N Things Farm. They utilize a sustainable rotational grazing system, working with the forest to provide the animals with the best quality of life and maintain the health of the land. Daisy and Rusty said they want to demonstrate that it is possible to produce good food and make money while also being responsible stewards and taking care of the land for the next seven generations. Cassandra Dickerson also enacts Indigenous values at Mountain Lake Cattle. She prioritizes good animal treatment, has a humane, low-stress butchering process, and uses every part of each animal.¹⁹⁸ Cassandra explained, "I'm all about using every piece, and making sure that nothing goes to waste so that animal is definitely respected in every single way."¹⁹⁹ Cassandra also shows respect by thanking the animals when they are harvested. Farmers are also enacting Indigenous values by respecting seasonality. Spring Alaska Schreiner described the approach at Sakari Farms:

What we do is we grow food all year round and then we store it, like the old traditional ways, where we put it away in dry storage, we save it and then when it's gone it's gone. And then it's springtime and then you start growing, harvesting, gathering, and then we sell it again. So we're trying to stick with that traditional mode and teach the non-Natives too that that's how we work. When we're out, we're out until we grow more.²⁰⁰

Spring is working to shift the expectation that farmers must provide constant, year round supply. Some Native chefs practice seasonal cooking, for example using dried chiles, tubers, and dried corn in the winter. Some Tribally-owned enterprises also use Indigenous values to design their businesses. For example, Twisted Cedar Wines was designed around Paiute values. Bill Tudor, the Executive Vice President, explained "The Cedar Band of Paiutes were very specific on sustainability—we want a wine that's sustainable, and with a female winemaker."²⁰¹ To ensure sustainability, the band selected a grower who maintains the Lodi Rules certification, which Bill described as the gold standard for sustainable viticulture. And the band chose to partner with a female winemaker, to respect their matrilineal values.

Indigenous values also guide chefs' choices about menu design and food preparation. Nico Albert, owner of Burning Cedar Indigenous Foods, sees food as medicine and as ceremony, and she describes her consulting work as helping people learn "to make our food from a perspective that is more consistent with the way our ancestors would have been eating".²⁰² Chef Trina Fyant, who is Bitterroot Salish/Qlispe/Blackfeet, a member of the Confederated Salish & Kootenai Tribes, and owner of Qene's Catering,²⁰³ described how she respects cultural protocols about when and how certain foods should be prepared, particularly when she works with ingredients that are traditional for a tribe other than her own:

¹⁹⁷ Phone Interview with Lucas Humblet, Co-owner, Yawelyahsi•yó• Farm (Oct. 21, 2021).

¹⁹⁸ Cassandra is expanding the cuts of meat she offers to utilize more parts of the cattle. She gives the viscera of the animals to a neighbor who uses them for dog food, sells all natural tallow balm (a skincare product) that she makes out of the beef tallow, and gives her beef hides to a local youth who makes leather out of them.

¹⁹⁹ Phone Interview with Cassandra Dickerson, Owner, Mountain Lake Cattle (Oct. 27, 2021).

²⁰⁰ Zoom Focus Group Interview with Spring Alaska Schreiner, Owner, Sakari Farms (Feb. 3, 2022).

²⁰¹ Zoom Interview with Bill Tudor and Phillip Anderson, Executive Vice President and Vice President of Sales, Twisted Cedar Wines (Oct. 19, 2021).

²⁰² Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).

²⁰³ Qene is Salish for paternal grandmother.

In the last few years I've been, especially through social media, learning a lot about other tribes' farming and agriculture, and their stories, and the seed keeping. And their cosmology with these. And how I conduct myself in doing these things is really asking like an exchange and permission to use these foods. In a way that I want to feel like I'm respecting and honoring other people's relationships that they have with what they grow. And that I'm doing service to that, the energy I put in, when I'm preparing meals, be that at a community level, or for tribal events. And how I try to send some things back that we gather that are really seasonal so that we have those exchanges and that our plant relatives understand that we're all trying to help each other and do this in the best way possible that holds our values as who we are as our tribal people. And honor those cosmologies and those creation stories. So I'm really acutely aware of those things when I'm trying to order food. And then sometimes people are really really good at answering my questions, because I'm like, "Is there certain things that I shouldn't cook with these, or is there a certain time that I shouldn't?" Because there are foods that are seasonal for us with our creation stories that are only used in the winter time, and we're not supposed to use them at other times, so I try to keep those in mind when I'm thinking of a local supply chain.²⁰⁴

Trina highlights how supply chains involving members of different Native nations can operate based on Indigenous values that emphasize respect, honor, and appropriate relationships. Indigenous values can also guide the appropriate sharing of Native foods with non-Native customers. Ben and Debbie Sandoval, owners of Tiwa Kitchen Restaurant, sought approval from their Pueblo before opening their restaurant, and they respect that certain foods, such as those used in ceremony, cannot be shared beyond their community. They do not serve these items at the restaurant and are careful about what they share with the public. These are just a few examples of how Native entrepreneurs enact Indigenous values in their businesses. This is the embodiment of self-determination and food sovereignty—Native food systems designed by and for Native people, centered on shared or tribally-specific values, to address Native goals.

²⁰⁴ Zoom Focus Group Interview with Trina Fyant, Owner, Qene's Catering (Feb. 28, 2022).

THE SOCIAL VALUE OF NATIVE FOOD BUSINESSES

A trend among Native food business owners is that making a profit is only one of their goals—the majority also want to create social value through various community-oriented objectives. This theme was ubiquitous among interview and focus group participants. All 18 interviewees and all 24 focus group participants spoke about having at least one—and more typically having many—goals centered on creating social value through their businesses. And although our survey did not include questions about the social value of participants’ businesses, this theme came up eight times in open-ended responses. For Native entrepreneurs the creation of social value is often grounded in Indigenous values that center respectful, reciprocal relationships and prioritize community wellbeing as a goal of food systems work.

i. Directing Revenue to Community

Many for-profit Native-owned food businesses use their revenue in community-oriented ways. For example, the Cedar Band of Paiutes created their wine business to raise funds for their community programs when the US government cut federal funding. Their profits support programs that benefit band members, such as after school programs for children. Some Native chefs buy from tribally-owned enterprises to direct money towards Native nations’ community programs, and others purchase from Native producers to support Native food systems and amplify the social and environmental value that Native producers create. Some chefs are investing directly in Native producers’ businesses. Watecha Bowl owner Lawrence West provides capital for producers to buy infrastructure to process their products to sell to Watecha Bowl.²⁰⁵ These are not loans, rather, Lawrence invests as a silent partner with the goal of supporting sovereign, debt-free Native businesses. Lawrence also uses Watecha Bowl profits to fund his community’s Native American day parades and methamphetamine awareness marches.

Other Native food businesses take on a non-profit structure to achieve their community-centered goals. Some are revenue-generating entities of non-profits, for example Indian Pueblo Kitchen and Gatherings Cafe; their revenue directly supports these Native non-profits’ community programs. During the pandemic Indian Pueblo Kitchen supported the Pueblo Relief Fund, which provided COVID relief money to the 17 Pueblos the Indian Pueblo Cultural Center represents. A survey participant shared another example, saying “We have sold in the past to cover the cost of sending interns to Nebraska, our Pawnee ancestral homelands, to grow and harvest our blue and eagle corn varieties. We are establishing a nonprofit and protections for our ancient varieties to protect from GMO corporate interests.”

ii. Employment and Economic Development

Native food businesses support economic development by creating and expanding employment opportunities for Native people. For example, former general/plant manager Joe Thompson shared that the Osage Nation’s meat processing plant created lucrative jobs for tribal members. Watecha Bowl owner Lawrence West also spoke about job creation, saying, “ The big thing with our business is the education part, we’re taking Native Americans without prior job training and putting them in the workforce, boosting their resumes.”²⁰⁶ A survey participant hires college students at their food stand and “pays them a premium” to help them get through the semester. And Native fish and seafood business owners said they started their fisheries to raise low fish prices and establish equitable markets for Native fishers. Native food businesses are creating systems change to address discrimination and inequitable market dynamics; this work supports healthy economies and has a rippling impact within and beyond Native communities.

²⁰⁵ In these contracts Lawrence provides money for infrastructure and guarantees that he’ll buy a certain amount of the product in exchange for the food producer guaranteeing to supply that product.

²⁰⁶ Zoom Interview with Lawrence West, Owner, Watecha Bowl (Sep. 29, 2021).

iii. Creating Food Access

A central goal for Native food producers is to feed people in their communities. Many Native communities are food deserts, so creating access to healthy foods in these underserved regions is particularly impactful, and is important to enacting food justice. Native businesses also make culturally significant foods accessible. Vanessa Casillas described how Gatherings Cafe created food access:

Our customer base was primarily Native. It was folks who were coming looking for specific items, [...] knowing that they could get Indigenous foods, and wanting something that they knew was going to be healthy, flavorful, and have unique ingredients that they couldn't get in other cafes in the area.²⁰⁷

Vanessa also worked to keep this food affordable for community members. A number of Native producers offer flexible pricing to provide affordable food, sometimes at the expense of their profits. For example, a survey participant explained, “We support our community through a variety of payment pathways to support folks wherever they are socioeconomically. We accept Food Stamps, payment plans, sliding scale pricing, in-house scholarship fund, etc. 50% of our customers utilize these alternative payment options.”

Native food producers participate in numerous free food distribution projects. Salmon King Fisheries provides produce and fish in free weekly food boxes for the homeless population on the Warm Springs Reservation. Sakari Farms also provides free tribal food boxes for members of the Warm Springs Tribe, and they donate food in collaboration with the Intertribal Agriculture Council and with the American Indian Housing Authority. The Columbia River Inter-tribal Fish Commission provides food boxes to address food insecurity in their area. During the pandemic Rudy Madrigal, owner of Coast Salish Seafood, donated between 40 and 50 thousand dollars worth of seafood to the Navajo Nation.²⁰⁸ And Gatherings Cafe served an average of 200 free meals per day via their elder meal program. Chefs are also providing pro bono or at cost catering for school educational programs, for example Nico Albert does this at Burning Cedar Indigenous Foods. There are countless tribally-run farms that provide no cost food to their communities. For example, a tribally-run farm in Arizona said their primary focus is providing food to their people, and a survey participant said, “we only “sell” our produce and goods to 3 Native owned organizations, but we do donate and provide free produce to [our] Tribal Members.” Another survey participant who manages a farm recently purchased by a Native nation described their operation’s new goals, based on the priorities of the tribe:

We have become [a tribally-owned farm] as of Jan 1 2022, prior to that we were a family owned, regional grower, packer, and shipper to the wholesale fruit and vegetable markets throughout the pacific northwest and Canada. We plan to now focus on expanding our food box program with sales to the hunger programs of regional tribal communities as well as training and empowering tribal members to gain the skills of operating the farming, packing, processing, shipping, marketing, and distribution functions. We will seek to work with local community hunger providers to create sustainable systems for post covid program provision of fresh food into the communities. We hope to create a regional model that others seek to replicate in other areas.

This demonstrates how Native businesses prioritize creating sustainable food access in underserved areas.

iv. Social Justice

Native food business owners are doing social justice work, including increasing visibility of Native people and Native foods, counteracting erasure of and discrimination against Native foodways, and presenting accurate positive representations of Native Peoples and cultures to the public to speak back against racism and stereotypes. One example of food-based social justice work is advocating for representation of Native foods within state and federal systems. Spring Alaska Schreiner, owner of Sakari Farms, found that the Oregon Department of Agriculture does not recognize tribal foods such as Douglas fir, rose hips, and sweetgrass. Spring is concerned about these products receiving Federal Food and Drug Administration approval, and is working to address this inequity by creating records with the USDA:

²⁰⁷ Phone Interview with Vanessa Casillas, former Business Manager, Gatherings Cafe (Oct. 19, 2021).

²⁰⁸ *Tulalip Tribal Members Donate Salmon, Goods to Navajo Nation*, Northwest Treaty Tribes, nwtreatytribes.org/tulalip-tribes-donates-salmon-goods-to-navajo-nation (last accessed June 30, 2022).

We took out an Akiptan CDFI tribal loan [...] to build a commercial kitchen facility, and once that is open the ODA inspector is going to come in, and all food products have to be FDA approved. And we're going to lose most of our products basically because [...] they don't know what it is. I've tried for three years since we bought the farm, I fill out my USDA survey, [...] I have made it a point to put Sweetgrass as a tribal food on the USDA books. [...] I'm trying to get more tribal foods on the USDA map so that they will become part of FDA dialogue down the road.²⁰⁹

Native food businesses also enact social justice by increasing the social and economic power of Native people. Watecha Bowl owner Lawrence West is working to create sovereign businesses to counteract discrimination and as an economic avenue for decolonization. Lawrence spoke about the change that food businesses can create, saying, "What I'm doing with food is directly connected to moving the Native American people forward, healing that education gap. If I could do this without food, I would never cook. [...] If you can take away one thing, please take away that. I'm an activist, I'm not a cook."²¹⁰

v. Human Health

Native food businesses support the health of the people they feed. Native communities experience disproportionately high rates of health conditions related to inadequate nutrition, brought about by the US government's efforts to separate Native people from Native foodways during colonization, and reinforced by ongoing disenfranchisement and structural inequities. Chef Nico Albert explained:

All of those problems that are plaguing Indian Country now come from removal, the core problem was colonization, and removal from traditional food sources caused reliance on those government food sources which are nutritionally devoid. There's nothing there that supports a healthy immune system or supports healthy bone growth. We're not out hunting and foraging anymore, people have become sedentary, and so that's caused obesity. Heart disease from eating foods that are packed with salt because they're preserved in cans and things like that. Reliance on processed foods because our communities are impoverished and so they don't have access to healthy foods, they have access to cheap foods. [...] All the problems that any marginalized community has now. [...] We've found ourselves living in food deserts where we're shopping at Dollar General.²¹¹

²⁰⁹ Zoom Focus Group Interview with Spring Alaska Schreiner, Owner, Sakari Farms (Feb. 3, 2022).

²¹⁰ Zoom Interview with Lawrence West, Owner, Watecha Bowl (Sep. 29, 2021).

²¹¹ Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).



Chef Nico Albert's trout with persimmon salsa. Photo courtesy of Nico Albert, owner of Burning Cedar Indigenous Foods.

Nico creates access to healthy foods for her catering clients, and through her consulting work; for example, she designed a new, healthy menu for the Cherokee Nation's Kawi Cafe. As another example, Ben and Debbie Sandoval, owners of Tiwa Kitchen Restaurant, were asked by members of their Pueblo to make sugar free jams for diabetic community members. They are working to create these with Native fruits they harvest themselves. Many Native producers are providing healthy foods to their communities, including organic food, humanely raised meat, buffalo and fish as healthy proteins, and fresh vegetables. Native food businesses are addressing health disparities by reconnecting people with Native foodways.

vi. Environmental Health and Environmental Justice

Environmental health and justice are guiding metrics for many Native food producers' daily agricultural practices. For example, Cassandra Dickerson works with counties and land trusts to utilize her cattle for fire control, vegetation control, and ecosystem restoration. Native food service businesses support environmental health by sourcing ingredients from producers (both Native and non-Native) who use sustainable practices. Chef Nico Albert described her motivation to source from Native producers:

Indigenous food purveyors have business practices that contribute to the health and wellbeing of the land that they're on. [...] When you support that food sovereignty, they are also looking out for the wellbeing of the land, the water, the animals and the plants that they share that all inhabit that land. All of those, it's all about reciprocity, right? [...] They're treating the land in a way that's going to heal it from the stripping that's happened through European styles of farming. [...] Everything I know that these tribal operations are doing are putting everything back into the earth that they take out of it. Because they see that land as their responsibility. [...] That's how Indigenous people operate, is we're thinking about our ancestors, ourselves, and the seven generations to come, with every decision that we make. [...] It's like "voting with your dollars", we have to buy things that are going to move us in the right direction.²¹²

Native food producers are supporting environmental health and sustainability; these impacts are amplified by those who purchase their products and support their businesses.

vii. Building Community

Native food businesses create interpersonal contexts and physical spaces for Native community building. Native-owned restaurants are locations where Native people can socialize, connect with one another, and build community relationships. In many cases they take on the role of a community institution—for example, Watecha Bowl owner Lawrence West explained, "When you walk into my restaurant you hear Native music, Native words, there's just kids in there playing around, there's old folks in there teaching us about stuff."²¹³ While Lawrence also described Watecha Bowl as a melting pot where people of many different cultures and ethnicities come together around Native cuisine, importantly, this is specifically a space where Native culture and community are celebrated. Native food businesses also build connections between Native organizations. As the business manager of Gatherings Cafe, Vanessa Casillas was tasked with building organizational partnerships:

Our catering, where we would have bulk pickup orders, were mostly to other organizations in the community that were Native-focused, Native-run. So we served a lot to the Native American Community Clinic, [...] Dream of Wild Health, and other events that were in the Native community. [...] Some of the efforts that I could have influence on as a business manager in building partnerships with other organizations and agencies was being like, "Oh this is Minnesota Indian Women's Resource Center, they're trying to help support women who are going from being homeless and trying to become housed again, so this aligns with our goals in providing food to Native people and caring for our relatives, so let's do this." [...] Because my role as business manager also worded out that I was in charge of trying to nurture relationships between programs and within the Indigenous food movement.²¹⁴

Native food businesses are creating social value by facilitating Native community building.

²¹² Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).

²¹³ Zoom Interview with Lawrence West, Owner, Watecha Bowl (Sep. 29, 2021).

²¹⁴ Phone Interview with Vanessa Casillas, former Business Manager, Gatherings Cafe (Oct. 19, 2021).

viii. Education

The vast majority of interview and focus group participants spoke about creating social value through education. Native chefs identified two audiences for this work. First, they are educating the non-Native public about Native culture and foodways. Ray Naranjo described this as a primary goal for Indian Pueblo Kitchen, saying “We’re trying to give a current window to the food culture of the Pueblo world, as we’re the first place that many people come when they’re visiting the Pueblos.”²¹⁵ The restaurant gives visitors to Albuquerque an opportunity to learn about Pueblo food culture in ways that are self-determined by Pueblo people. Ray also educates customers about historic Native trade routes, by using ingredients that were once traded such as amaranth and quinoa, and by preparing modern dishes that reflect trade relationships. For example, Ray explained, “We have a duck mole. Mole wasn’t necessarily eaten anywhere, it’s more of a modern sauce. [...] But it also ties us to Mesoamerica, which is always forgotten from our story but plays a pivotal role in our story as Pueblo people.”²¹⁶ Another aspect of educating the non-Native public is creating markets for, and encouraging appreciation of, Native cuisine. When Nico Albert started her catering business during the pandemic, she included an educational component to cultivate a market for her services. She explained, “There’s definitely a growing market for Indigenous foods, but I wasn’t sure that I could really support my family as the sole breadwinner, [...] just running a catering business that specializes in Native American food, when 90% of the public doesn’t know what Native American food is.”²¹⁷ For Nico, public education is an avenue towards creating a legible role for herself as a Native foods consultant and caterer:

It’s good for me and it’s been good for the Cherokee people, and Indigenous people, and Indigenous visibility, because that’s part of my job is talking about Native food and telling people what it actually is, [...] it’s so much more beyond fry bread, teaching people the difference of that. [...] There’s different chefs out in Indian Country that are doing the same thing.²¹⁸

Similarly, Ben Jacobs and Matt Chandra started Tocabe: An American Indian Eatery because they wanted to increase the representation and visibility of American Indian food. Matt explained:

Tocabe started from Ben and I hanging out in college talking about, “why isn’t American Indian food being represented in the culinary landscape of America?” [...] If there’s such a huge Native population and Indigenous population, why isn’t the food represented? And so we started talking after University of Denver, of maybe there’s an opportunity to do that.²¹⁹

Tocabe has a fast-casual format where customers move along a counter and select the components of their meal. Ben described how this allows for real-time customer education on Native cuisine, saying “We thought that fit because it built a guest interaction, but also the ability for people to ask questions and see what they were getting.”²²⁰ Native chefs are using food-based education to engage the non-Native public, counteract the erasure of Native Peoples, and advocate for Native self-representation.

The other audience for Native chefs’ educational work is Native people, both youth and adults. Many chefs expressed a strong motivation around sharing knowledge, which is vital for the continuation of Native foodways. As one chef who does community outreach catering put it, “for me, my main mission is to say that knowledge is continuing and we’re building our community around the reclamation of that knowledge.”²²¹ Native chefs are also providing professional training for aspiring chefs. For example, Indian Pueblo Kitchen operates a teaching kitchen where they train Native entrepreneurs in the culinary arts. They also offer college accredited classes on Native cuisine, and do youth education through local schools. Another example is Chef Nico Albert’s work with the Cherokee Nation’s Kawi Cafe:

²¹⁵ Phone Interview with Ray Naranjo, former Executive Chef, Indian Pueblo Kitchen (Sep. 21, 2021).

²¹⁶ Phone Interview with Ray Naranjo, former Executive Chef, Indian Pueblo Kitchen (Sep. 21, 2021).

²¹⁷ Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).

²¹⁸ Zoom Interview with Nico Albert, Owner, Burning Cedar Indigenous Foods (Oct. 12, 2021).

²¹⁹ Zoom Interview with Ben Jacobs and Matt Chandra, Co-owners, Tocabe: An American Indian Eatery (Oct. 19, 2021).

²²⁰ Zoom Interview with Ben Jacobs and Matt Chandra, Co-owners, Tocabe: An American Indian Eatery (Oct. 19, 2021).

²²¹ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

This is a menu consultation job, where I have been paid a consulting fee to come in, write a whole new menu, write all new recipes, train the staff, teach the staff, basically kind of be their Auntie for the next two weeks and tell them everything that they weren't raised knowing, that none of us were raised knowing. There was this gap, due to residential schools reprogramming, due to just all sorts of little effects of colonization, and big effects. But our cultural disconnect from our food sources in that traditional way, in our ceremonial way of looking at food. That's something that we're trying to bring back. [...] And it's a way that we can restore health and wellness to our communities, is by reestablishing that relationship with food [...]. So those are the concepts that come with my consulting [...]. And then showing people where to source food.²²²

Several other Native chefs also described their work as remedying the “education gap” created in Native communities by the residential school system and colonization. These chefs are facilitating cultural connection and decolonization by teaching the preparation and stories of traditional foods.

Native food producers are providing Indigenous, land-based education; many offer on-farm programs for community members to connect with land and experience food production firsthand. One Native chef also works on an educational farm where they teach youth how to grow and preserve food:

It's a non-profit educational farm, so we do a lot of work with different schools around our area. So we actually teach students how to put the seeds into the ground, water, weed, harvest, and then also utilize it after it's done. And then even more so, the different methods of preservation. So Navajo steam corn is one of the oldest forms of preserving food, and we call it Neeshjizhii. And we get to teach these students these different things.²²³

Sakari Farms, a for-profit tribal food and education farm, hosts tribal food cooking classes and seed saving classes. Lucas Humblet teaches seed saving at Yawelyahsi•yó• Farm. Daisy Perez-Defoe and Rusty Defoe teach community members how to process chickens at Birds N Things Farm. And at Salmon King Fisheries, Brigette McConville provides sensory-based cultural education for visiting groups, education foundations, and schools. Several survey respondents also described their educational work, saying: “We do educational outreach to tribal communities, local communities and other non-profits. We also have partnerships with Universities and specific programs to support native education,” “I work with a Woman's Business Center in Farmington, NM to help business women build sustainable organizations on their own,” and “I do research and consulting about food systems, Native food sovereignty, and food access.”



On-farm education at Birds N Things Farm. Photo courtesy of Daisy Perez-Defoe and Rusty Defoe, owners of Birds N Things Farm.

Finally, some Native food producers mentor other Native food producers. Naknek Family Fisheries served as an educational model for new fisheries in the region, and Izetta Thompson provided pro-bono consulting to other business owners. The Osage Nation's meat processing plant offers tours and shares advice with tribes who are considering starting meat processing operations. A tribally-owned farm in New Mexico offers guidance to other farms, and provides tours to demonstrate the potential of Native agribusiness to investors and support capital acquisition. Native food systems participants are sharing their knowledge to ensure the continuation of Native foodways and support thriving Native food systems.

ix. Social Value of Native Food Businesses Conclusion

Native-owned food businesses are creating immense social value and working for the wellbeing of future generations. A Native chef described this during our food service focus group:

It's our generation that has a certain responsibility to carry the torch for the next. We are all from different tribes from all over the country, but there's so many common threads to what I'm hearing. [...] Your work is making a difference, my work is making a difference, together as we work toward this, hopefully we can pull some of the kernels of wisdom from our past, from our ancestors, so that we can add something to the narrative as a whole. And effect positive change on our country.²²⁴

The clear motivation that Native food systems participants have to benefit others through their work places their businesses firmly within the realm of social enterprises. For-profit Native-owned food businesses often play similar roles in their communities as non-profit Native food organizations. Funders that focus on creating social impact in Native communities are currently missing significant opportunities to expand this impact by funding for-profit Native businesses—given the social and educational value these businesses provide, it would be appropriate for grants that are available to non-profit organizations to also be made available to these for-profit social enterprises.

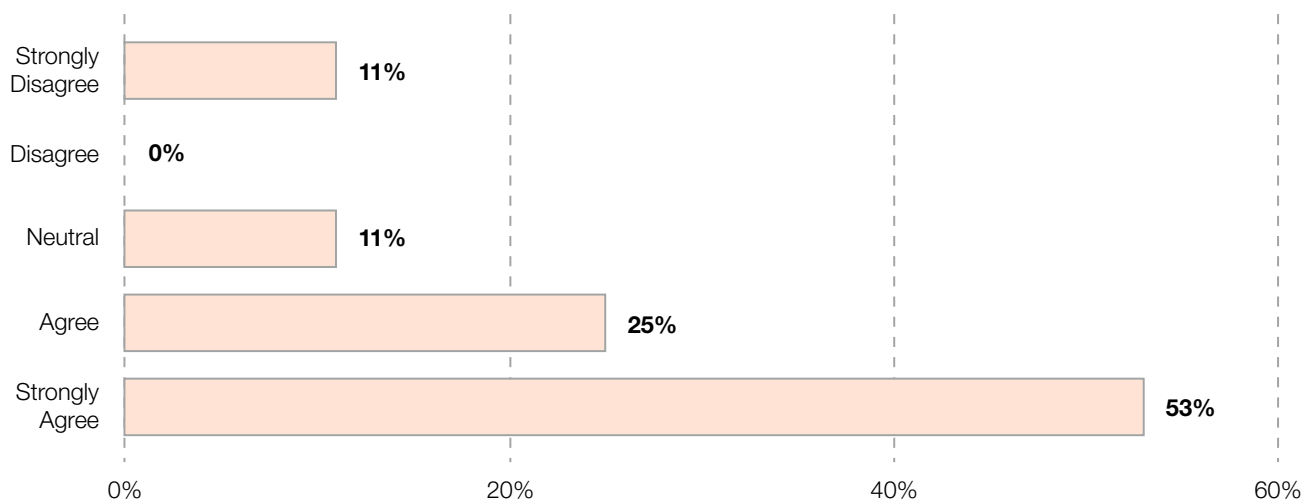
²²⁴ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

NATIVE FOOD SUPPLY CHAIN VISIONS

A. DESIRE TO BUILD NATIVE SUPPLY CHAINS

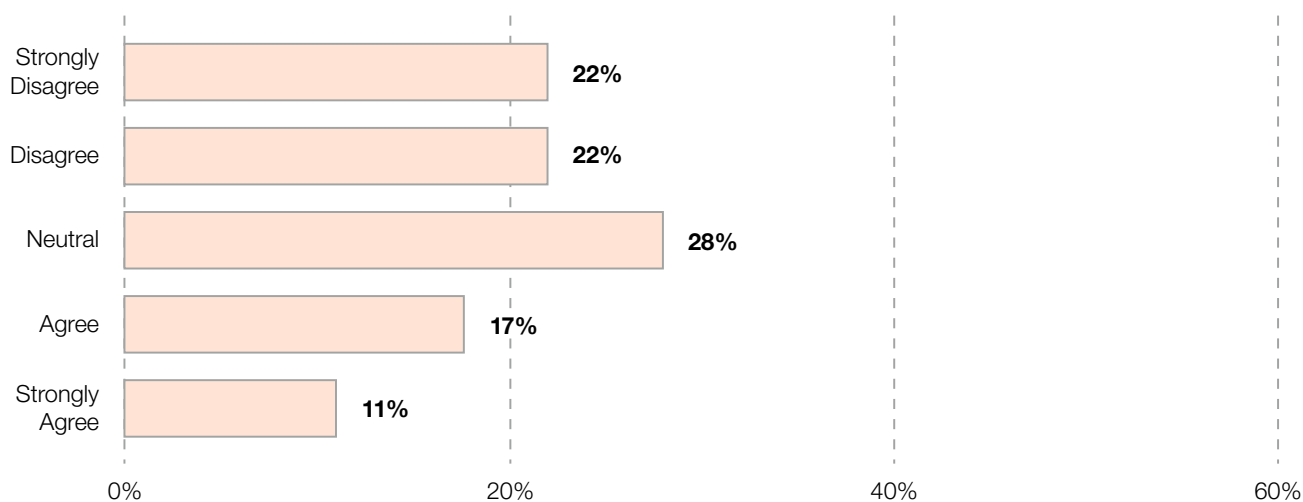
Native food business owners expressed strong interest in further developing Native food supply chains. The majority of interview and focus group participants are already participating in Native supply chains in some way, with the exception of several people who live in areas with no opportunities to do so. Many businesses said they are highly motivated to participate in these chains, and have already put extensive effort into building Native supply chain relationships. Most importantly, all 42 interview and focus group participants directly stated that they would like to increase their involvement in Native food supply chains. This theme was confirmed by survey results.

“I want to participate in a Native supply chain.”



Out of 36 respondents who answered whether they agree with the statement “I want to participate in a Native supply chain,” 53% strongly agreed and 25% agreed, totaling 78% of participants who want to participate in a Native supply chain. 11% of respondents were neutral, and 11% strongly disagreed.

“I am currently a part of a strong Native supply chain.”



Survey results also indicate that there is room to increase participation—despite most respondents’ desire to participate in a Native supply chain, only 28% of participants either agreed or strongly agreed that they are currently part of a strong Native supply chain, 28% were neutral, and 44% either disagreed or strongly disagreed that they are currently part of a strong Native supply chain. Native supply chains can be intra-tribal, local, regional, or national, and these models are not mutually exclusive—rather, many research participants would like to see them enacted alongside one another.²²⁵ By prioritizing food going to the Native food producer’s community first, and to export second, supply chains can be built with respect for the relationships between Native producers and their communities, while also building mutually beneficial relationships across Indian Country.

B. INTRA-TRIBAL FOOD SUPPLY CHAINS

Intra-tribal Native food supply chains are created by and for a single tribe. The Osage Nation’s meat processing plant, Butcher House Meats, is an example of a Native supply chain designed around serving tribal members first. They process the tribe’s herds of cattle and bison, and animals belonging to individual tribal members, provide meat for members of the Osage Nation via their butcher shop (around 50% of their customers are tribal members), and sell meat to Osage-owned restaurants across the US. Many Native food producers said they want to provide food to their own people, for example to schools or other institutions on their reservations. One rancher would like to see the Navajo Nation have their own meat processing facility to handle each element of the meat supply chain themselves. Daisy Perez-Defoe and Rusty Defoe of Birds N Things Farm spoke about their interest in seeing Rusty’s tribe develop food sovereignty initiatives to feed tribal members:

Rusty: We’ve looked at their farm and they don’t have any livestock. And it’s like, you have all this land, and you could put a bunch of animals on here, you can grow them out properly, and allow people to come and view the food that’s being made. And do it in a very good manner, treat these animals well with care, and then feed your community.

²²⁵ For example, one survey respondent said, “Being so far North in the armpit of the US puts us in a unique position where getting access to goods can be a little harder, but this is something we would like to resolve this year. Our business is Native owned, with Native employees, supplying food to the Native community, and this is something we are really grateful to have the ability to do, but it would be nice to be able to be a part of the bigger picture.” This demonstrates how people would like to participate in local and national Native supply chains simultaneously.

Daisy: [...] Because then seven generations down the road, there's going to be tribal members that know how to do this [...]. There's a big opportunity for tribal governments to secure their own food line and not depend on the commod shed and the government shipments. It would be great for them to be like, "hey, we grew these 100 chickens, let's go process them or send them to the processor, and then these 100 chickens that we grew right here on the reservation are now available for our elderly box".²²⁶

Native nations can provide for their own people through intra-tribal supply chains, and many Native food producers want to see their food feed their own communities via these supply chains.

C. LOCAL AND REGIONAL NATIVE FOOD SUPPLY CHAINS

Another model is to build food supply chains involving multiple tribes in a local area. These chains can support resilient food systems and access to regionally specific traditional foods. Lucas Humblet and his partner started Yawelyahsi•yó• Farm to enact their vision for a local Native supply chain:

I was living in Minneapolis, and to me it definitely seemed that there was not an equitable access to healthy nutritious food there. [...] That was one of our biggest motivators was to provide healthy, actually nutritious food to our Indigenous community in Minneapolis and the surrounding areas. We felt that a lot of our Indigenous seeds in our seed bundles would be part of that, that we could grow our Indigenous seeds and supply that to the community members, whether it was through our CSA boxes or selling to local chefs down there in Minneapolis [...].²²⁷

Lucas and his partner hope over time to establish a strong, local Native supply chain to feed Indigenous community members healthy foods grown with Native seeds. Similarly, all of the ranchers we spoke with said they want to sell to Native people and Native institutions in their regions. One rancher wants to supply a popular tourism enterprise run by his tribe, and another wants to supply schools in her district. Native ranchers also want to see the development of tribally-owned meat processing infrastructure that could be used by all the Native producers from multiple tribes in a region, as one rancher explained, these facilities could be "brand[ed] with our own Indigenous people coming together throughout the region."²²⁸ Some ranchers are already participating in regional Native supply chains. For example, one rancher sells to tribes through FDPIR, and her meat is distributed via five sites in her region. She explained, "That entails a large group of Native Americans that we get to serve our beef to. [...] Finally the USDA has opened up an opportunity for tribes to procure some of their food from within their tribes. So it's finally coming to fruition."²²⁹

Some Native chefs and food producers prioritize local supply chains to support environmental sustainability. Trina Fyant, who is Bitterroot Salish/Qlispe/Blackfeet, a member of the Confederated Salish & Kootenai Tribes, and owner of Qene's Catering, also works as a consultant for her tribe's food sovereignty program. Trina spoke about her tribe's interest in local supply chains:

When I think about the tribal food sovereignty program, one of the issues that we're trying to do is cut down on our carbon footprint. So shipping in wild rice, which I would like to do and we want to use, but then, we're trying to keep the supply chain local. But we don't have a local source for those things. [...] A lot of the produce we're ordering and getting in is based upon whatever the farms are selling. We weren't traditionally in agriculture so we don't have things like squash and corn that other tribes do that we can source ourselves or people that are seed keepers that can grow and do that. So we're kind of at the moment beholden to what local farms are doing.²³⁰

²²⁶ Phone Interview with Daisy Perez-Defoe and Rusty Defoe, Owners, Birds N Things Farm (Oct. 21, 2021).

²²⁷ Phone Interview with Lucas Humblet, Co-owner, Yawelyahsi•yó• Farm (Oct. 21, 2021).

²²⁸ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

²²⁹ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

²³⁰ Zoom Focus Group Interview with Trina Fyant, Owner, Qene's Catering (Feb. 28, 2022).

When local supply chains are limited by food availability, people may need to navigate tradeoffs between building Native food supply chains and enacting Indigenous values that prioritize sustainability. Overall, Native chefs and producers are very supportive of local and regional models for Native supply chains.

D. NATIONAL NATIVE FOOD SUPPLY CHAINS, NATION TO NATION TRADE, RE-ESTABLISHING PRIOR TRADE ROUTES

National Native food supply chains involve inter-tribal trade between Native nations or Native individuals, without geographic limits, and can include the revitalization of prior trade routes across Indian Country. Many Native producers already sell their products to Native people and businesses across the US. This model was popular among research participants—21 out of 42 interview and focus group participants brought up the idea of trade between Native nations, and said they would like to see this increase. 3 survey participants mentioned this idea in open-ended survey responses, for example one said, “I think reestablishing trade routes between tribes. Distribution hubs in different regions of turtle island.” Many research participants discussed the historical precedence of trade routes between Native nations. For example, Brigette McConville of Salmon King Fisheries explained:

The trade network is huge, the Columbia River, they call that the Wall Street of America or the first Mall of America, you know, you can get whatever you needed there. And there was the Klamath trail and the coastal trail and the eastern trail from Montana down, from the southwest up. So it was centralized around food all the time. And it is possible to do some trading, that would be a great celebration to come together and do some trading with other tribes and celebrate our food and our friendships and just coming together.²³¹

Brigette highlights relationship building through nation to nation trade. Ben and Debbie Sandoval, owners of Tiwa Kitchen Restaurant, described how Pueblo people were growing chiles from South America when the Spanish arrived. Chef Trina Fyant, who is Bitterroot Salish/Qlispe/Blackfeet and a member of the Confederated Salish & Kootenai Tribes, shared another example:

Everything to the west of us, all of our sister tribes that speak Salish, they’re all salmon based, fishing based people on the Columbia all the way to the coast. [...] And we’re east of that and we have stories of traveling east and we were bison hunters. But we have stories about how we traded for bison and salmon back and forth with our relatives to the west.²³²

Nation to nation trade has long been an important part of Native food systems. Inter-tribal trade also facilitates access to foods from other regions. Rudy Madrigal, owner of Coast Salish Seafood, explained:

I think that’s the biggest deal, is networking within our own people, because that’s where it stops. Everybody believes “oh you’re Tulalip or you’re Puyallup or you’re Lummi or you’re Navajo,” it seems like that’s the boundary that everybody puts. So I want to bridge that gap between nation to nation, tribe to tribe and say “well, what resource do you have? I have salmon...” Florida, Seminoles, they’ve got oranges, so I want your oranges, I want to bring them over here. Rice, Minnesota, down in Oregon, they’ve got coffee, you know, just a whole variety of everything everywhere [...]. Somehow there’s got to be a platform that we can all get together.²³³

Buck Jones, CRITFC’s salmon marketer, shared a similar vision for Native supply chains across the US:

Having those trade routes that we’ve established, that our tribal members have had for years, having those trade routes and having inter-tribal commerce, I just look at it as like, “Wow, I’d really like to get some of the shellfish from up north, and I’d really like to trade for some bison in the midwest, and what if we could get the Seminole oranges and the orange juice up here in the Northwest?” [...] I just really see that as something that I think would really be key.²³⁴

²³¹ Zoom Focus Group Interview with Brigette McConville, Owner, Salmon King Fisheries (Jan. 27, 2022).

²³² Zoom Focus Group Interview with Trina Fyant, Owner, Qene’s Catering (Feb. 28, 2022).

²³³ Phone Interview with Rudy Madrigal, Owner, Coast Salish Seafood (Nov. 10, 2021).

²³⁴ Zoom Focus Group Interview with Buck Jones, Salmon Marketing Specialist, Columbia River Inter-tribal Fish Commission (Jan. 27, 2022).

Daisy Perez-Defore of Birds N Things Farm shared similar comments, saying “It would be great if at one point there was a Nation to Nation trade. [...] There’s a reservation that grows their own corn, it would be great if let’s say Red Cliff could trade apples [...] for corn there, or if we get the food system self-sufficient enough up there so that they can trade pork and chicken with each Nation.”²³⁵ A representative of a tribally-owned seafood enterprise in Washington also spoke about this model:

The idea of the trade chain, I’ve been talking about that forever. You know, we have finfish, but we don’t have bison. We have shellfish, but there’s stuff over there on the east side of the mountains that we don’t have. [...] We all have our annual ceremonies, powwows and such, where we feed the community. And that’s what I’ve always thought was how can we go over there and feed that community what we eat over here, and what we have available. And to have somebody come from over there, and feed us in our community what they’re accustomed to. And I think if we’re able to do that, that’s a start. If you can source that product out there into these communities over there, then it will open the door for selling product.²³⁶

This highlights the possibility of initially building relationships around sharing and celebrating food; this could then grow into formal trade. Indigenous values can support trading these foods in appropriate ways. Trina Fyant, who is Bitterroot Salish/Qlispe/Blackfeet, a member of the Confederated Salish & Kootenai Tribes, and owner of Qene’s Catering, described her approach to respecting other Native Peoples’ relationships with their traditional foods while engaging in national trade. She focuses on asking for exchange and permission, honoring these foods, and respecting protocols for using the foods so that “our plant relatives understand that we’re all trying to help each other and do this in the best way possible.”²³⁷ In this way, nation to nation trade can be centered on Indigenous values such as respect and reciprocity.

National trade routes also keep money circulating within Native economies. As Spring Alaska Schreiner, owner of Sakari Farms, said, “Having more inter-tribal trade, increasing inter-tribal trade routes, communication, oral traditions, will help our economy.”²³⁸ Ben Jacobs and Matt Chandra, co-owners of Tocabe: An American Indian Eatery, are sourcing products from Native food producers across Indian Country for use in their restaurant, and to sell via their online Indigenous Marketplace. They highlighted their vision for building a national Native food supply chain:

²³⁵ Phone Interview with Daisy Perez-Defoe and Rusty Defoe, Owners, Birds N Things Farm (Oct. 21, 2021).

²³⁶ Zoom Focus Group Interview with anonymous (Jan. 27, 2022).

²³⁷ Zoom Focus Group Interview with Trina Fyant, Owner, Qene’s Catering (Feb. 28, 2022).

²³⁸ Zoom Focus Group Interview with Spring Alaska Schreiner, Owner, Sakari Farms (Feb. 3, 2022).



Tocabe: An American Indian Eatery’s braised shredded bison served with hominy, sweet corn, and roasted green chiles. Photo courtesy of Ben Jacobs and Matt Chandra, co-owners of Tocabe: An American Indian Eatery.

Matt: Our ideal supply chain is, for us, to reduce the amount of hands that participate that are non-Native and [non-] Indigenous. [...] If shipping is the only hand that is a non-Native or Indigenous business, then that is acceptable. But making sure from a supply chain standpoint that money stays within Indian Country 95-98% of the time. [...]

Ben: I think that a grand vision is for it to be [...] like, huge. Like really actually a huge distribution supply chain. And I think that what we're attempting to do is building in some safe falls that can help with that, like the restaurants. [...] Because if we can [guarantee distribution] through a successful restaurant brand, then that only extends our ability to distribute further and more items. So I think the grand idea is to just be able to really be the resource for Native food producers to get their items to market.²³⁹

Ben and Matt emphasize the economic impact of Native supply chains, and want to provide infrastructure and connections to bring Native producers' food to broader Native markets. A Native chef who does educational outreach catering described how trade routes also strengthen Native food systems, saying "It's making relationships like this work, and it really is going back to those trade routes that I think we can reclaim some of that, I don't want to say control, but we can dictate the narrative a little bit more, in how we can strengthen these food systems and reclaim them. With our support."²⁴⁰ National Native supply chains are a way to build mutually beneficial relationships, celebrate friendships, create broader access to regional foods, keep money circulating within Indian Country, and strengthen Native food systems.

i. The Value of Native Food Supply Chains

In addition to the cultural, relational, and gustatory value of Native food supply chains, research participants emphasized their economic value. These chains allow Native enterprises to retain a larger portion of the food dollar—on average, farms receive only 16 cents of each dollar spent on food produced in the US.²⁴¹ Through Native ownership at every step of the supply chain, Native businesses can capture the value added during processing and distribution and channel it into Indigenous economies, where it will continue to circulate and have ongoing economic impact. Currently, this value is lost when Native enterprises sell their food to non-Native companies which bring these products to their end markets. Native supply chains also allow Native producers to have more agency in deciding where their products end up. Native Peoples will continue to develop their supply chains in diverse ways based on their own goals and priorities. In the context of rebuilding from the disruptions caused by the COVID-19 pandemic, there is an opportunity for Native Peoples to build in self-determined visions for their food supply chains, and to strengthen Native food sovereignty for future generations.

²³⁹ Zoom Interview with Ben Jacobs and Matt Chandra, Co-owners, Tocabe: An American Indian Eatery (Oct. 19, 2021).

²⁴⁰ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

²⁴¹ US Department of Agriculture Economic Research Service, Quick Facts, Food Dollar Series, www.ers.usda.gov/data-products/food-dollar-series/quick-facts (last visited Aug. 22, 2022).

RECOMMENDATIONS

A. EXPAND STEADY MARKETS FOR NATIVE FOOD BUSINESSES AND FOOD ACCESS FOR NATIVE COMMUNITIES

1) Provide support for Native-owned food service businesses to increase Indigenous sourcing.

Native food service businesses significantly strengthen Native food supply chains when they source ingredients from Native food producers. They can expand markets for Native-produced foods by purchasing these foods, and by publicizing their ingredient sources on their menus and in their advertising. When customers see Native suppliers listed on Native restaurants' menus, they become more familiar with Native foods and producers, and may seek out and purchase these products themselves. Native food producers directly benefit from the increased market demand this publicity brings.

If Native restaurants can afford it, having a dedicated staff member to work on Native sourcing could be beneficial. Research participants highlighted that sourcing from Native producers takes time, knowledge, and familiarity with Native food systems, and chefs said it would be helpful for people who source restaurant ingredients to have education and support to streamline their work. Native organizations can provide targeted resources for Native food service workers. Specific support topics identified include: how to locate Native suppliers, how to cost out menus to budget for purchasing Native products, and how to work with Native food producers to support them in negotiating lower shipping rates with mail carriers. Native organizations should draw from the expertise of Native chefs and food systems consultants when collating these materials. Native organizations can also create mentor programs to connect beginning Native chefs with experienced Native chefs, and secure funding to compensate mentors.

2) Provide steady markets for Native food producers through purchasing agreements.

If a customer can commit in advance to purchasing a set quantity or proportion of a producer's products over a specific period of time, this allows the producer to increase production to meet this demand.²⁴² Daisy Perez-Defoe and Rusty Defoe of Birds N Things Farm explained:

If we knew that there's Native American restaurants that are for sure going to buy it, and we can grow food directly to meet their quotas, and they are for sure going to be the customer at any given point, it would be a security blanket for us. It would mean that we can concentrate on growing this great food for them and processing it, without worry if maybe it won't happen, maybe it will happen.²⁴³

Native and non-Native restaurants, grocery stores, and institutions should consider entering into contracts or purchasing agreements with Native producers.

3) Create a safety net program to support Native food producers during market transition.

In some cases, dependence on existing steady markets prevents Native food producers from transitioning to selling food to more Native customers. This issue is particularly relevant to Native businesses in the middle of supply chains, who feel a responsibility to continue to provide steady markets for the producers they source from. Establishing new markets is risky, so Native business owners need a financial safety net to provide security while they are establishing new relationships with Native customers or Native businesses/institutions. Investors or funders who want to support the development of Native supply chains can reduce the risk of market transition by providing a guarantee that, for a specific time period, they will pay for products if new customers fall through. In this way, funders can hedge negative impacts from rippling through Native supply chains in the event of sales volatility, and give Native food producers the necessary time and security to establish stable markets with Native customers.

²⁴² However, increased demand is not a substitute for direct investments in Native food producers' businesses.

²⁴³ Phone Interview with Daisy Perez-Defoe and Rusty Defoe, Owners, Birds N Things Farm (Oct. 21, 2021).

4) Encourage non-Native purchasing by educating consumers.

Many research participants said they would like to see non-Native customers buy from Native producers, as increased sales can generate revenue that will allow Native food businesses to scale, supporting strong Native food systems. Some non-Native customers may not be aware of Native food producers, or realize that they can and should purchase from them. Vanessa Casillas, former business manager of Gatherings Cafe, underscored this when she shared that many of her contacts in the non-Indigenous food justice movement have asked her if it would be appropriate for them to buy food from Native producers. To increase broader market demand for Native-produced food, those involved in educational outreach or marketing can encourage non-Native consumers to purchase from Native food suppliers, invite them to support the Native food sovereignty movement, and educate them on how to participate appropriately given their positionality.

5) Increase direct to consumer sales to Native customers through flexible payment options.

Many Native food producers want to sell to more Native customers via direct to consumer sales. Some of these producers already offer sliding scale pricing systems, payment plans, or work trade to make their food accessible to any members of the Indigenous community who cannot afford the food at full price. Two producers said they see an increase in Native customers when they are able to offer flexible pricing. Native food producers who offer flexible pricing can emphasize this in their marketing, and those involved in food systems outreach with Native communities can work to increase publicity about the presence and prevalence of Native food producers and the existence of flexible payment options. Providing outside funding to subsidize flexible pricing would help make Native foods accessible to all members of Native communities, while also ensuring the livelihood of food producers.

6) Tribes can support their food producers by creating opportunities for them to sell their products, preferentially purchasing from tribal member producers, and believing in their producers.

Native nations can create market access for tribal member producers by cultivating opportunities for them to sell food within their communities; this also supports community food access.²⁴⁴ Tribes can provide free space for producers to sell their products in tribally-owned convenience stores, or create stationary or mobile farmers markets. Native nations' institutions, such as schools and elder programs, can implement policies to preferentially purchase from tribal member producers and Native producers. It would be beneficial for tribal leaders, if they are not doing so already, to engage with tribal member producers as potential assets to their community, and find ways to recognize the value these producers offer.

7) Increase tribally-owned casinos' purchasing from Native food producers.

While some Native producers are successfully selling to their own or other tribe's casinos, many identified tribally-owned casinos as an underdeveloped market that they want to develop business relationships with, but have difficulty accessing. One survey respondent explained:

[...] We make award winning spirits, yet we continue to struggle with placing our products in most of [our state's] tribal gaming facilities despite all we have accomplished in a few short years. We continue to receive regional, state and national attention for who we are and what we have done, however placement in tribal operations continues to elude us.

One barrier identified in this research is that some tribes contract out the management of food and beverage operations in their casinos; when management is contracted to non-tribal entities, sourcing from Native producers may not be a priority. If Native nations want to support inter-tribal trade, they must let casino management know that sourcing from Native food and beverage businesses is a strong priority. Tribes can create a metric for Indigenous sourcing to guide casino management, for example, making a goal to source a specific percentage of food from Native food suppliers. This could be structured as a percentage of ingredients/SKUs, a percentage of food volume, or a percentage of food costs. By making Native sourcing a clear priority for casino management, tribes have the power to create significant new market opportunities for Native food producers, and to strengthen Native supply chains.

²⁴⁴ For example, A tribally-owned seafood enterprise in Washington sources fish and value-added products from their tribal members to sell in their retail store. Their representatives explained, "For the most part we do that as a service to our tribal members, not as a money making opportunity. We just want to make sure that they're able to harvest and sell their products." This enterprise is creating a pathway to market for their tribal members' products, which illustrates the value that tribally-owned enterprises can bring to their communities when they choose to source from their citizens.

Organizations such as the National Indian Gaming Association (NIGA) could also help establish Native food and beverage sourcing as a priority for tribally-owned casinos. NIGA could create a resolution requiring or requesting member tribes to prioritize purchasing from food businesses owned by Native people or nations. Among others interviewed, Buck Jones, of the Columbia River Inter-tribal Fish Commission, explained the positive impact this would create:

If there was a way to get a charter through the National Indian Gaming that says “Our first option should be our tribal members, our tribal producers, our tribal companies, our tribal entities.” To get that into their casinos first. [...] If there was a way to get a national organization to have some kind of charter for our tribal producers, I think that would be huge, you know? [...] Let’s reach out as a tribal people how we think, think of our grandchildren’s children and their grandchildren. What we start working on now in 2022 that will be set in motion for them.²⁴⁵

8) Universities and other institutions should modify their food purchasing policies to allow Indigenous sourcing for food-based educational programming.

Some Native food producers and chefs work with universities to provide food-based educational programming. Sourcing ingredients for these events from Native food producers can be an important priority for Native educators. However, some are encountering barriers. One chef explained:

My primary work is in event management, and developing educational programming. And one struggle is we work a lot in partnership with universities and other, you know, more corporate minded organizations. And sometimes sourcing can be a real struggle in those partnerships. [...] Quite often [universities] are restricted, and there’s a lot of red tape to go through for them to be legally able to source directly from Indigenous farms or producers. Often they are required to utilize their already established systems or sources. [...] Helping them develop better systems to engage with this work and be able to properly source, that’s definitely an area that needs a lot of attention. Because I’ve definitely had those moments where we’re doing an event and we share resources of where they can source ingredients [...], and then we’ll show up to the event and they just have a bunch of like, you know, Sysco wild paddy rice.²⁴⁶

Universities and other institutions that are working to build strong partnerships with Native food educators need to modify their policies to allow for Native sourcing. To frame the necessary policy changes to institutional decision makers, allies within institutions can emphasize the role that Native food supply chains play in Native food sovereignty, and the relational and epistemological significance of ingredient sourcing practices—wild rice sourced from Sysco is not the same as wild rice sourced from a Native food producer. Native sourcing has educational value. These policy changes would support good relationships with Native food educators, demonstrate respect for Native knowledge systems, and increase markets for Native producers.

9) Revise the federal definition of “local” food to allow for inter-tribal trade.

The USDA is awarding \$400 million to state and tribal governments to fund local food purchasing via the Local Food Purchase Assistance Cooperative Agreement Program (LFPA). However, some regions do not have an adequate local supply of Native-produced or culturally significant traditional foods—existing supplies are limited and are spread out across the US, with some locations containing more surplus than others. At the same time, many Native people want to direct Native-produced foods to Native communities. It is essential to revise the USDA’s definition of “local” food for LFPA, and any future programs that support local food purchasing, to allow tribes to source food from Native producers from any tribe across the country. Without this policy change, there are many Native nations who will not be able to equitably participate in LFPA because of limited local food supplies/supply chain infrastructure. Defining “local” to include inter-tribal trade is in the spirit of local food purchasing—it recognizes the relationships between Native nations, and supports community access to Native-produced, culturally significant foods.

²⁴⁵ Zoom Focus Group Interview with Buck Jones, Salmon Marketing Specialist, Columbia River Inter-tribal Fish Commission (Jan. 27, 2022).

²⁴⁶ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

10) Address commodity competition.

Competition with the commodity market is a significant barrier preventing Native ranchers²⁴⁷ from establishing solid customer bases, scaling their businesses, and participating in Native food supply chains. To address this at a systemic level, the USDA must alter current policies that support large-scale meat producers being able to sell their meat at artificially low prices. USDA can also provide support to balance market opportunities for smaller scale ranchers, for example through subsidies to help them offer meat at prices that can compete with the commodity market. Helping smaller scale producers gain and retain footing in an inequitable market driven by commodity foods and large meat suppliers is not just beneficial for Native food producers and their communities—it is also beneficial for the US food system as a whole, as diversifying meat supply chains is essential to creating a stable and resilient food supply.²⁴⁸ Another approach is to support Native ranchers to transition to direct to consumer sales, which allows producers to capture the value added during finishing and processing. Native ranchers expressed strong interest in direct marketing, however, they stated that to transition they need grants or investments to purchase equipment, and support with marketing to establish customer relationships.

11) Direct funding to cover the purchase of Native-produced foods to feed Native communities, and expand the FDPIR 638 Self-Determination Demonstration Projects so all tribes can participate.

When Native food producers price their products equitably based on the time and labor that go into their production, they can become unaffordable for some Native customers. An approach to bridge this price gap is to fund Native nations, institutions, and organizations to procure food from Native producers for community distribution.²⁴⁹ Native nations and organizations used COVID relief funding to create access to healthy Native foods for those who were otherwise unable to receive those foods due to lockdown or quarantine policies, or due to financial impacts of the pandemic. Additional funding would facilitate the continuation and expansion of this work. For example, USDA could create a program to subsidize Native schools and elder programs procuring Native-produced foods. The Food Distribution Program on Indian Reservations (FDPIR) 638 Self-Determination Demonstration Projects have also shown that funding tribal procurement creates significant opportunities for Native food producers to feed Native consumers. There is unmet demand for participating in this program—USDA should make permanent and expand the FDPIR 638 program so that all tribes can participate, and expand parity to enable tribes to administer all federal nutrition programs (for example child nutrition programs²⁵⁰) and procure Native-produced foods. The Native Farm Bill Coalition, which is a vital policy voice for Indian Country's interests, is advocating for these changes, and for numerous other farm bill provisions to support Native food systems.²⁵¹

B. SUPPORT PRODUCTION AND NATIVE FOOD SYSTEMS

1) Address federal policies that prevent land and water access for Native nations and Native individuals, and return land and water to Native Peoples.

Limited land and water access are constraining the current Native food supply and preventing Native producers from increasing production. This was a prominent theme in interviews and focus groups, and survey respondents underscored this with comments such as “Help Native farmers get affordable farming land with water rights,” “Continue land access work on federal and state levels. Adjust blood quantum needs for Natives to be recognized,” and “Water! We need water to grow more produce and to clean our produce to keep our food safe to eat.” The federal government can work with tribes to identify and change policies that prevent them from accessing land, such as BIA policies that lease land within Native nations to non-Native food producers.

²⁴⁷ While this is a specific issue that is affecting Native meat producers, it is also relevant to Native food producers in other sectors.

²⁴⁸ U.S. Department of Agriculture, *USDA Agri-Food Supply Chain Assessment: Program and Policy Options for Strengthening Resilience* (2022).

²⁴⁹ It is also necessary to fund food production in tandem with funding food purchasing to keep supply and demand in balance.

²⁵⁰ Food Research & Action Center and the Intertribal Agriculture Council, *Child Nutrition Reauthorization: Strengthening Programs in Tribal Communities* (2022).

²⁵¹ *About Us*, Native Farm Bill Coalition, www.nativefarmbill.com (last visited August 30, 2022).

To compensate for lost lands, federal programs could cover the cost for tribes to lease or purchase privately-owned lands.²⁵² The federal government should also work with Native nations to create systems for co-managing public lands that are their ancestral territories, and facilitate tribal members harvesting or producing food on these lands.

Tribes with larger land bases can explore avenues to offer free or reduced land leasing to tribal member producers, or allow them to utilize commonly held tribal lands for their businesses. Native organizations or producer cooperatives could buy land to lease to food producers, or create agricultural incubators. Native land trusts can work to increase access to lands for grazing or harvesting, depending on the trust's rules and conditions. Non-Native farmers who are making succession plans can give their land to young or new Native farmers in their wills, or return the land to Native nations for agricultural use; Native organizations could help guide non-Native producers through these processes.

Limited water access is causing crop loss, limiting producers' abilities to grow certain crops, and forcing some to downsize their operations to save water. It is crucial to ensure that Native nations receive the water they are entitled to as the first users of water sources throughout the United States. Funding infrastructure to deliver water is also essential. There will likely be increased demand for drought mitigation projects, including irrigation infrastructure. Expediting drought projects that are funded by the federal government is vital to ensure that food producers can continue operating.

2) Continue to elevate the importance of addressing climate change, and create risk mitigation programs to support food producers who experience climate-related losses.

Food production depends on variable environmental factors which are increasing in volatility. To protect food producers' businesses from climate-related instability, it is crucial to provide programs that compensate Native producers for climate-related losses, and ensure food security for Native communities who lose food supplies to climate disasters. While there are existing federal disaster relief programs for producers, eligibility depends on location, production history, and other factors, and the Noninsured Crop Disaster Assistance Program requires producers to purchase coverage. Disaster relief programs should expand eligibility to include Native and Indigenous foods that are not currently covered, such as wild-caught fish and wild-harvested plants. Additional programs administered by tribal governments or Native organizations could fill in coverage gaps. The federal government should also compensate Native food producers for ecosystem services they provide. As a survey participant suggested, policy makers can "Lobby for changes in the Farm Bill to establish payment for ecosystem services program for traditional and Native American/Indigenous farmers whose methods are regenerative and produce vital and largely unacknowledged ecosystem and economic base services." There is precedence for this sort of compensation, such as the Environmental Quality Incentives Program.²⁵³ Additional steps can be taken to support Native food sovereignty in the context of climate change; for example in a presentation at the Fifth Annual Conference on Native American Nutrition, Andrea Carmen discussed the importance of listening to Indigenous Peoples' requests in climate work with the United Nations, recognizing and respecting traditional ecological knowledge, and incorporating UNDRIP into climate agreements.²⁵⁴

3) Support and fund Native seed keepers, seed banks, seed libraries, and educational seed keeping programs.

Native seeds are the foundation of Native food supply chains. Seed keeper Lucas Humblet of Yawelyahsi•yó• Farm described how seed keeping is central to Native food sovereignty:

I was [on a panel] at a symposium right before the pandemic hit [...] and I was saying "What is our food system going to do if these seed companies go under, if they can't meet the demand? [...] We're not going to have access to these seeds and we're not going to have our food. And we need to start seed keeping." And a few months later the pandemic hit, and then there were all these seed shortages. And these companies couldn't keep up with the orders and so they had to start shutting down [...].

²⁵² For example, by creating programs similar to the Land Buy-Back Program for Tribal Nations, that apply to lands within reservation boundaries which could be bought back into Native ownership and utilized by Native food producers.

²⁵³ United States Department of Agriculture, Environmental Quality Incentives Program, Natural Resources Conservation Service, www.nrcs.usda.gov/wps/portal/nrcs/main/national/programs/financial/eqip (last visited September 12, 2022).

²⁵⁴ *Conference Videos*, Native American Nutrition, nativenutrition.umn.edu/2022-conference-videos (last visited September 15, 2022).

It's catastrophic. And it just shows how fragile our food system is, and the seed distribution networks. [...] We've got to do what our grandparents and great grandparents did and just save our own seeds. I think that's really what this pandemic was showing is that we need to be more self-reliant or reliant on our community members, and seed banks and seed libraries.²⁵⁵

Centralized seed supplies are vulnerable to supply chain shocks; seed keeping is essential to resilience in the face of future disruptions. Funders should support Native seed keeping programs. Policy makers should work with seed keepers to identify ways to protect ancestral and Indigenous crop varieties; for example, a survey respondent suggested that policymakers "Revive the Obama Co-Existence policy initiative to allow for the creation of restricted agricultural districts to protect crop varieties developed in our centers of origin and diversification of native crops like corn, bean, and pumpkin." This would help prevent cross-pollination with genetically engineered crops, which threatens the genetics of Indigenous varieties.²⁵⁶ At the same time, it is also important to support seed keeping for non-Indigenous crops that Native producers are growing.

4) Address the limited personnel bandwidth of Native enterprises by providing support for workforce development, shifting work culture in the food service industry, and providing mental health support for food systems workers.

Building Native food supply chains takes significant time; however, many Native-owned food businesses do not have enough staff to do the work to locate suppliers or customers, build business relationships, and solve supply chain logistics. The federal government, tribes, or Native organizations could provide grants for workforce development. Native organizations could help businesses advertise for open positions, as finding potential employees can be time-consuming. There have been labor shortages and employee burnout in the restaurant industry due to high stress, lack of equitable pay, and lack of benefits; an infusion of capital to increase wages could help. It is also necessary to shift food service industry culture to decrease job stress and support work-life balance. Two interviewees who work in food service said providing mental health support for employees is crucial (this is also important for food producers). Trauma support is one element of this.²⁵⁷ Food service businesses can connect employees with resources, and Native organizations can partner with service providers to offer culturally appropriate support, for example with mental health professionals who are Native themselves, or are familiar with dynamics surrounding generational trauma in Native communities.

C. REMOVE ROADBLOCKS TO PROCESSING AND EXPAND INFRASTRUCTURE

1) Create additional federal, tribal, and private programs to fund meat processing infrastructure; fund fish processing infrastructure, mobile processing units, and ongoing workforce development.

The Meat and Poultry Processing Expansion Program (MPPEP), authorized by the American Rescue Plan Act, provides grants for private entities to build new meat processing facilities, or modernize or expand existing facilities. This recommendation is intended to affirm the ongoing need for the MPPEP, and to assert the need for additional funding to expand meat processing capacity in Indian Country specifically. Funding meat processing infrastructure that is privately owned by Native entities is essential to creating resilient supply chains in Indian Country. However, there is also need for additional, separate funding for tribally-owned facilities. Funding mobile processing units is also crucial to create access for ranchers who are spread out across rural areas and do not have the capacity to transport animals long distances to a processing center. Fish processing infrastructure is essential—fish is an abundant resource harvested by many Native fishers, and is a culturally significant protein for a large number of Native nations. Research participants shared comments about how they would like to see processing facilities structured—one rancher would like to see her tribe have their own processing center for tribal member ranchers to utilize, and multiple ranchers and one fisher suggested establishing regional meat/fish processing centers owned by Native cooperatives to be used by Native producers from multiple tribes.

²⁵⁵ Phone Interview with Lucas Humblet, Co-owner, Yawelyahsi•yó• Farm (Oct. 21, 2021).

²⁵⁶ Casandia Bellevue, *GMOs, International Law and Indigenous Peoples*, *Pace International Law Review* (2017).

²⁵⁷ For example, a survey participant stated that to build Native supply chains, "We would need to continue to build entrepreneurship within tribal communities. Removing barriers to success such as capital, education, and trauma support."

Representatives of tribally-owned meat processing facilities noted that, while vital, building infrastructure is merely the first step—staffing and running a processing facility can be an ongoing challenge. Mitch Albright, the Director of Agriculture for the Quapaw Nation, explained:

Personnel has been an issue for us since day one, since we've opened. The need for butchers in processing has been astronomical. Our turnover rates have been over 60% some years. When you're training you're losing money. And in the world we live in money's everything unfortunately. So having an avenue for product before you even process is a huge one. You know, infrastructure's the easiest part of it. You can build the plant. It's running it that's the tough part.²⁵⁸

Joe Thompson, the former general/plant manager for the Osage Nation's meat processing plant, also spoke about the scarcity of potential employees with the necessary skills to run a meat processing plant; the Osage plant is addressing this through employee training. MPPEP grants can be used for workforce recruitment, training, and retention, but ongoing investment into this area is crucial to ensure that new and expanded meat processing facilities can operate successfully in the long term.

2) Address the existing shortage of state and federal meat inspectors to provide equitable access to inspection across geographic regions, and provide designated inspectors for Native nations to ensure that tribal producers have access to inspection.

This research identified a lack of available state and federal meat processing inspectors in South Dakota, Arizona, and on the Navajo Nation (Arizona/New Mexico). Further research is needed to determine whether there are inspector shortages in other regions; the USDA and state departments of agriculture should conduct direct outreach to Native ranchers to determine if there is unmet demand for inspectors in their areas. Providing additional inspectors is an action which would immediately expand meat processing capacity in Indian Country. There are also local processing facilities which do not provide inspection; if these were to start doing so, this would increase capacity. Policy changes are needed to increase inspector availability. A representative of a state agriculture department stated that they provide an inspector to any facility that requests one. However, the department looks at the volume of meat the facility is processing to determine how to allocate the inspector's time, and some facilities must share an inspector with other locations. Allocating inspection time based on processing volume may create unintended inequities in processing access. There may also be a causality dilemma at play—when inspection is offered based on current processing volume, it is difficult to determine how much this volume would increase if additional kill days were offered. State departments of agriculture can work to more accurately assess processing demand and allocate inspectors appropriately; they can also increase the total number of inspectors on staff.²⁵⁹ To address the equity issue, they can provide inspectors to every facility irrespective of production volume. Increased inspection capacity would also allow ranchers to increase their production volume.

To fully ensure equity, the USDA and state departments of agriculture should allocate inspectors specifically to serve tribal communities. Native ranchers agreed that the best way to create equitable access to inspection would be to designate an inspector to serve each tribe, or to serve multiple tribes in a region. A rancher in South Dakota explained:

We need to have inspectors within our own reservations. [...] The bad thing about being [a USDA] inspector [...] [is] the [USDA] determines where you go. On this day you need to be, say here in South Dakota, you need to be in Rapid City tomorrow and inspect this facility and then the next day you need to be on the other side of the state. We need to be able to have some leeway within that and the tribes need to fight that, if we have a tribal inspector that's got these certifications, his only responsibility is within his boundaries of his reservation.²⁶⁰

²⁵⁸ Zoom Focus Group Interview with Mitch Albright, Director of Agriculture, Quapaw Nation (Nov. 19, 2021).

²⁵⁹ Joe Thompson, the former general/plant manager at the Osage Nation's meat processing plant, stated that wages offered to state and federal inspectors are often not competitive enough to attract and retain individuals to fill these positions. If necessary, increased funding should be allocated by the federal or state governments to better compensate meat inspectors and ensure that there are enough to meet processing needs.

²⁶⁰ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

Ranchers identified inspectors as the essential link necessary for them to supply food to their own tribes. To support Native meat supply chains, economic development, and food sovereignty, state departments of agriculture and the USDA should provide designated inspectors to tribes, or allow Native nations to supply their own inspectors to receive training and certification to provide state and federal inspection.

3) Fund the creation and expansion of infrastructure for production, transportation, processing, distribution, and retail, owned by Native nations, Native entrepreneurs, and Native cooperatives.

It is necessary to expand infrastructure at every level of the supply chain.²⁶¹ Many Native communities are food deserts; funding grocery store infrastructure is vital to increase community food access and build Native supply chains.²⁶² Funding sources can include the federal government, investors, social impact funds, and tax revenue collected by Native nations, and should support infrastructure owned by Native nations, Native entrepreneurs, and Native cooperatives. An additional strategy is to create more incubator farms, food service business incubators, and equipment libraries to provide infrastructure access.

4) Increase producer revenue by providing support for value-added product creation.

Native producers can capture additional revenue from along the value chain by making value-added products. Developing value-added product businesses requires capital, business connections, processing infrastructure, and skill building. A survey participant highlighted the need for wraparound services to support this, saying “Assist entrepreneurs (financially and with marketing support) in starting value-added processing businesses. Connect them with producers that have raw materials. Building community food processing facilities and commercial kitchens would be a good first step. Create curriculum at tribal colleges for food processing and marketing.” Native organizations and tribes can develop programs to support value-added business development on all of these levels, and can provide support to increase access to USDA programs such as the Value-Added Producer Grant.

D. FACILITATE NETWORKING, SUPPLY CHAIN CONNECTIONS, DISTRIBUTION, AND LOGISTICS

1) Expand networking resources such as Native food systems directories, include information and search functionalities to build supply chain relationships, use targeted outreach to build more comprehensive directories, and create programs for interactive supply chain networking.

One of the most popular requests from interview and focus group participants was for networking resources to help Native-owned food businesses connect. This was supported by survey data—out of 32 respondents, 53% said they can’t locate Native businesses to buy from, and 31% said they can’t locate Native businesses to sell to. Survey participants also asked for networking resources 16 times in response to open-ended questions that asked for recommendations on strengthening Native supply chains and what would help them become more involved. Responses included “Make sure all Native owners are listed in Native directories”, “a website (if one doesn’t already exist) that lists Native businesses and contact info,” “Community food production index,” “Need to know who produces what,” “Being able to find Native owned companies,” “I would need to know which businesses are Native in my area,” and “We need to get organized. There are many of us that transport goods all over turtle island but we need to develop a stronger collaboration.”

²⁶¹ Survey participants stated that they need the following: food preservation equipment on a co-op level, equipment for making value-added products, USDA kitchens or commissary kitchens at an affordable price, USDA meat slaughter and processing facilities, meat processing equipment, fish processing equipment such as tables, scales heading machine, filleting, storage (totes) forklifts, pallet jacks, freezers, juicers, dehydrators, individual quick freezers, huskers, blanchers, roasters, greenhouses, poi mills, refrigerated vans, delivery vans, harvest trucks, trucks or transport vehicles, trailers, cattle trucking, and tractors. Interview participants said they need equipment for poultry processing, finishing cattle, and equipment to make UPC codes and labels.

²⁶² As one survey respondent said, “It’s difficult to build [a Native supply chain] due to the lack of infrastructure on the reservation. Most reservations are food deserts and thus the people lack nutrition, this leads to more health problems. It’s a systemic issue. If reservations had decent grocery stores, not ones that sell high preservatives & cause customers to travel over 50 miles to the nearest grocer, well then we drown in our own ailments and medical bills.”

There are already several lists of Native food producers, for example the Made/Produced by American Indians Directory collated by the Intertribal Agriculture Council (IAC). These lists are immensely useful resources for connecting Native entrepreneurs across the supply chain.²⁶³ Still, research participants said there is a need for additional or more comprehensive producer lists. For example Vanessa Casillas, former business manager of Gatherings Cafe, started her sourcing research with the lists from IAC, I-Collective, and Toasted Sister Podcast, and then did additional research:

Even after I had all those lists from the different sources, I still created my own list, because it wasn't comprehensive, and everyone is going to need a different product. [...] I do feel like there's still a need for another list, even though there's already so many, because it doesn't seem like we are all aware of all [the producers], you know?²⁶⁴

Expanding producer directories could significantly amplify their value and connect more Native food businesses into Native supply chains.²⁶⁵ This area is ripe for collaboration between organizations, to utilize each organization's connections without duplicating the labor that has gone into existing resources. Research participants said targeted research or in person outreach would be beneficial to locate food producers/businesses in geographic regions which are underrepresented in current guides (for example the Pacific Northwest), or who do not have a web presence. Outreach to each Native nation could also amplify impact. As rancher Cassandra Dickerson explained, "There's all this information out there, but it's not getting to every tribe,"²⁶⁶ for example, her tribe and others in her area were not aware of the IAC until she showed them the directory. Cassandra emphasized that in her experience, face to face outreach is the most successful way to let tribes know about initiatives they can participate in.

Expanded networking resources should include frequently updated web links, current contact information, the ability to search for specific food products, and the ability to search by geographic region. Resources should indicate whether producers do direct to consumer sales; if they can provide large volumes wholesale; areas where they can make deliveries, areas they can ship to, and whether they currently have product for sale. Directories could allow producers to update their own listings, or the organization hosting the resource could reach out to producers periodically to keep the resource updated. Directories could include a producer map with a radius search tool for customers to locate producers within a certain radius of their own location. For example, currently to qualify as "local" for LFPA, producers must be within a 400 mile radius; this tool could be used to locate qualifying producers. Directories could have direct messaging functionality to facilitate supply chain networking. Another possibility is to create a website where Native entities who are searching for specific products could post an RFP or a listing for Native food producers to respond to. One research participant suggested a regional directory encompassing all industries, to connect Native food producers with Native businesses that can provide operational supplies, packaging, transportation, infrastructure development, construction, or equipment.

Research participants also suggested more interactive approaches for supply chain networking and relationship building. Stephanie Saucedá-Manuel, general manager of Gila River Farms, explained:

My biggest thought on that is communication. And creating a [...] program that we can come together monthly, or even annually, or biannually, to see who's got what, who's producing what, what it's going for, and then how we can help to promote it within our own communities. [...] That would be a great opportunity to open Native American's eyes to what other Native communities are doing. [...] Even one meeting quarterly would be awesome, just to get updates on who's doing what, and what would be available for future purchase and things like that.²⁶⁷

²⁶³ Several chefs said they use the IAC directory and other lists to locate Native producers to source from, and two farmers said the IAC's American Indian Foods program helped them build relationships with other producers and build markets overseas.

²⁶⁴ Phone Interview with Vanessa Casillas, former Business Manager, Gatherings Cafe (Oct. 19, 2021).

²⁶⁵ For example, we identified 85 Native food businesses enterprises that have a business web presence but are not listed in the IAC directory, 32 of which are food producers or value-added product businesses. According to USDA's 2017 Census of Agriculture, there are 79,198 producers who identify as American Indian or Alaska Native; presumably there are more Native entrepreneurs who may want to be listed in directories.

²⁶⁶ Phone Interview with Cassandra Dickerson, Owner, Mountain Lake Cattle (Oct. 27, 2021).

²⁶⁷ Zoom Interview with Stephanie Saucedá-Manuel, General Manager, Gila River Farms (Oct. 28, 2021).

A Native organization could host the meetings via video calls or in person, and collate information about the items each producer/tribe is selling, to send to meeting participants.

2) Establish distributors, aggregators, and/or food hubs that are Native-owned (cooperatively or privately) to provide larger volumes of Native-produced foods to Native customers.

Another of the most popular recommendations shared by participants is that there is need for one or more tribal food distributors to consolidate food from smaller scale Native producers and provide it in larger volumes to Native businesses, institutions, and communities. Producers strongly support this idea. For example, Spring Alaska Schreiner of Sakari Farms explained, “I wish there was a tribal wholesale distributor. I’m dealing with white or non-Native distributors here that don’t really understand our food, they push it aside [...]. But it’s high valued, it costs a lot, it sells out immediately.”²⁶⁸ Jen Falck, owner of Kahulahele Farmstead, agreed, saying “A running theme in my personal and professional life lately is that we need a tribal food ag co op distributor.”²⁶⁹ And a representative of a tribally-owned farm in New Mexico said, “I wish there was a distribution company, some inter-tribal or multi-tribe where we could ship to directly and then they can disperse that to other tribes.”²⁷⁰ Another approach is to create regional food hubs²⁷¹ across Indian Country. The Native American Agriculture Fund and the IAC have been advocating for the creation of a network of regional Native food hub cooperatives;²⁷² this research affirms that Native producers support this model. For example, a survey participant explained:

I believe the Regional Hub model described in the “Reimagining Native Food Economics” publication by NAAF would work well in Indian Country. Remote locations, transportation, and labor force are challenges on most reservations. Being part of a supply chain controlled by Native people, from production to consumption, could motivate participants at every step of the way.

Food hubs can provide infrastructure for Native food producers to process and sell their products locally, and these hubs can interface with one another to facilitate inter-tribal trade across the country.

Distributors or food hubs can connect small scale producers to buyers who prefer to source from large distributors, such as restaurants, Native institutions, or food distribution programs. Jen Falck explained, “We’re pretty small scale, so can I provide enough white corn for all of the food distribution boxes in the new 638 FDPIR program? No. But maybe me and ten of my other growing friends can do that, to sell to a co op that can then be sold to those FDPIR boxes.”²⁷³ This also supports producers—as one farmer explained, “There’s a lot of interest in Indian Country in forming cooperatives because it takes the burden off the shoulders of the producers, not having to be the sole provider.”²⁷⁴ Food hubs or distributors also provide market access. Spring Alaska Schreiner explained, “We need somebody to help us with marketing and PR and distribution. We need a pivotal person that can reach out to all of these other entities to help expand tribal enterprise.”²⁷⁵ A food hub or distributor can provide marketing, customer connections, logistics coordination, and may even become a go-to location for Native businesses to source from, making it easier to build Native supply chains.

²⁶⁸ Zoom Focus Group Interview with Spring Alaska Schreiner, Owner, Sakari Farms (Feb. 3, 2022).

²⁶⁹ Zoom Focus Group Interview with Jen Falck, Owner, Kahulahele Farmstead (Feb. 3, 2022).

²⁷⁰ Zoom Focus Group Interview with anonymous (Feb. 3rd, 2022).

²⁷¹ The USDA defines a food hub as “a centrally located facility with a business management structure facilitating the aggregation, storage, processing, distribution, and/or marketing of locally/regionally produced food products.”

²⁷² Native American Agriculture Fund, Reimagining Native Food Economics: A Vision for Native Food and Agriculture Infrastructure Rebuilding and Recovering (2021).

²⁷³ Zoom Focus Group Interview with Jen Falck, Owner, Kahulahele Farmstead (Feb. 3, 2022).

²⁷⁴ Zoom Focus Group Interview with anonymous (Feb. 3rd, 2022).

²⁷⁵ Zoom Focus Group Interview with Spring Alaska Schreiner, Owner, Sakari Farms (Feb. 3, 2022).

Whether privately or cooperatively owned, Native leadership and ownership is essential to ensure that supply chains are centered on Native values and keep money in Native hands. A cooperative's structure can be tailored by its members to meet their needs.²⁷⁶ The IAC provides support for creating cooperatives, such as model charters, by-laws, operating manuals, and tailored guidance. Tribes can pass laws to allow their citizens to incorporate a cooperative under tribal law rather than federal or state law; this supports food sovereignty and can benefit Native food producers. Private Native-owned distribution companies can also support food sovereignty. Some Native businesses are building national distribution models, for example Ben Jacobs and Matt Chandra, co-owners of Tocabe: An American Indian Eatery, are working to build a national Native food distribution company that will operate wholesale and direct to consumer through Tocabe Indigenous Marketplace.²⁷⁷ It would be beneficial to have both cooperatively and privately owned Native distributors or food hubs, so that producers have multiple options to bring their products to market.

Another possibility is to have an entity that does not physically aggregate, house or move food, but rather coordinates logistics and works with appropriate partners to store and transport food. Dan Cornelius, IAC's former Technical Assistance Specialist for the Great Lakes Region, explained:

We're working on laying the foundation for a regional inter-tribal cooperative. Absolutely there's need for it nationally and beyond. It just takes a lot of resources to be able to effectively manage that type of an operation. So part of what we're also looking at now is [...] a virtual warehousing program. [...] I feel that it's almost more important to be coordinating logistics, versus having a whole fleet of trucks moving around. Because there's different options to be able to move product, if you have the logistics coordinated. [...] But recognizing even there, it takes a lot of expertise, it takes infrastructure logistically, and it just takes staff time to be able to do it.²⁷⁸

It is possible for Native entities to do the bulk of the logistics work while utilizing existing infrastructure to outsource the transportation of food to other entities. This requires less capital investment into physical infrastructure; capital could be used to fund staff time instead.

3) Address the limited personnel bandwidth of Native enterprises by outsourcing time-intensive supply chain logistics coordination work to Native organizations.

When Native enterprises are understaffed, Native organizations can assist to solve for supply chain logistics. Native organizations can work with and for Native enterprises to coordinate logistics with prospective customers the enterprise has identified, or build customer/supplier connections; this would allow Native businesses with low personnel bandwidth who want to participate in Native food supply chains to outsource this work to an appropriate partner. Dan Cornelius, IAC's former Technical Assistance Specialist for the Great Lakes Region, shared an example:

We had a pilot project of a mobile farmer's market, and we did a lot of that direct—especially working with really small producers—working on moving and selling that product. We went to a lot of different conferences, and were able to have a booth with a huge assortment of product [...] that people could actually buy. And I think that there's huge interest in it, it's just that it's incredibly labor-intensive to be able to operate.²⁷⁹

²⁷⁶ Cooperatives can define a member in any way they want, so membership classes and structures can be designed for the stakeholders or communities the cooperative serves. One option is a producer-owned cooperative, which can support members via marketing, bookkeeping, or purchasing supplies for members' businesses to benefit from economies of scale and access them at a lower cost. By reducing overhead and incorporating vertical integration, producer cooperatives may be able to offer their products at a lower price, making them more accessible to Native communities while still providing fair pay to member producers. A consumer-owned purchasing cooperative could support Native tribes, customers, institutions, and businesses to purchase from Native food producers by taking on the clerical work necessary to source foods. Another option is a multi-stakeholder cooperative with two membership classes for producers and consumers.

²⁷⁷ Tocabe Indigenous Marketplace, shoptocabe.com (last visited Aug. 29, 2022).

²⁷⁸ Zoom Focus Group Interview with Dan Cornelius, former Technical Assistance Specialist for the Great Lakes Region, IAC (Feb. 3, 2022).

²⁷⁹ Zoom Focus Group Interview with Dan Cornelius, former Technical Assistance Specialist for the Great Lakes Region, IAC (Feb. 3, 2022).

Dan highlighted the need for more organizations to take on this crucial coordination work—referencing a different IAC program, he explained, “We’ve been working within [our region] on working across the supply chain and really having partners to help to coordinate and access different connections with lists of producers, infrastructure, and that’s really what we need more of.”²⁸⁰

4) Utilize stopgap approaches and/or expand the use of existing infrastructure to distribute Native-produced foods while working to build more long-term solutions.

Interview participants discussed approaches they have used to build their supply chains which may be useful to other producers. For example, Native producers can use third party distribution services such as Commodity Forwarders to fill in gaps in supply chain logistics. The extreme cost of shipping is another distribution barrier. Vanessa Casillas, former business manager of Gatherings Cafe, shared a solution to expand distribution in the short term—producers can negotiate lower shipping rates with their shipping provider. Native organizations can provide information for producers on how to negotiate shipping, such as example rates.

5) Support supply chain resilience by building redundancies into supply chains and establishing multiple distribution channels.

Infrastructure redundancies support resilience, for example, having contingency plans for if key equipment fails. During the pandemic some businesses adapted to lost markets by switching distribution channels; enterprises that already had multiple sales channels in place were able to switch more easily. Native businesses can work to establish customer contacts and distribution mechanisms in multiple channels; acquire processing/packaging equipment for both wholesale and retail; and build websites that facilitate direct to consumer sales. Funders should provide capital to support resilience planning.

E. ADDRESS REGULATION AND CERTIFICATION BARRIERS

1) Provide technical assistance and cost share programs for food safety and other certifications for Native food producers.

Certifications help Native food producers access markets—restaurants, grocery stores, and schools require food safety certification, some farmers markets require HACCP or USDA meat certification, and organic certification can help producers reach new customers and obtain higher product prices. However, certification can be labor-intensive. Continuing to provide technical assistance is important. The Indigenous Food and Agricultural Initiative (IFAI) is the Native American Tribal Center for Food Safety Outreach, Education, Training and Technical Assistance, and provides valuable support to Native food producers. Tribes and communities can work with IFAI to provide producer trainings. Additional local and tribally-run certification programs could increase access to support. The cost of certification can also be prohibitive; there is a need for programs to subsidize certification fees for Native enterprises based on financial need. These could be modeled after existing cost share programs, such as the USDA’s Organic Certification Cost Share Program, but should cover as large a proportion of costs as possible, extend to food safety and inspection certification fees, and have a quick, streamlined application process.

2) Advocate for representatives of state and federal agencies to interface with tribes and Native food producers to ensure that Native foods are recognized and included in food regulations, and adjust regulations to encompass Indigenous methods of sourcing and producing these foods.

Research participants stated that state food inspectors and the federal Food and Drug Administration do not recognize some Native foods, for example Douglas fir, rose hips, and sweetgrass. Native food producers must be able to obtain FDA certification for products that contain tribal foods. State and federal agencies should address inequities in certification and market access by interfacing with tribes and Native food producers to ensure that all Native foods and food production methods are recognized, that wild-crafted plants and wild game are eligible for inclusion in food products, and that there are clear pathways for Native foods to receive food safety certifications.

²⁸⁰ Zoom Focus Group Interview with Dan Cornelius, former Technical Assistance Specialist for the Great Lakes Region, IAC (Feb. 3, 2022).

3) Clarify and streamline food safety regulations to facilitate the movement of Native-produced foods across jurisdictional boundaries.

Native food producers are subject to state, federal, and tribal regulations, requiring them to navigate an inequitable amount of regulations compared to their non-Native counterparts. Native food producers must operate within a complex maze of overlapping regulations when selling their products across (or even within) reservation borders. For example, the Navajo Nation sits within three states, so meat sold across state lines within the Navajo nation must be federally inspected. These regulations prevent Native food producers from supplying food to their own people, and are a significant barrier to market access. It is crucial to consult with tribal leaders and with Native producers and food service businesses to determine how best to resolve these barriers to support their ability to provide safe, certified foods to tribal members and to broader markets. Federal, state, and tribal officials can collaborate to establish clarity and provide information on which regulations apply to Native producers, and change policies to ensure that producers no longer have to comply with three separate sets of regulations to bring their foods to market. Policy makers should also lighten requirements on small processors to reduce and streamline the bureaucratic processes they must engage in to legally operate as a business, while still supporting them to provide safe products. To support inter-tribal trade, regulations could be changed to allow food certified as safe by any Native nation to be sold to customers in other Native nations. Tribal leaders have also requested in USDA consultations for Native nations to be able to create and enforce their own food safety regulations to be treated in equal standing with federal regulations, to allow for sale of tribally-certified foods nationally across state lines.

4) Native nations can create their own food and agriculture codes to support and regulate their food systems and promote food sovereignty.

Food and agriculture codes are a mechanism for Native nations to clarify regulations for their food producers and enact policies that support food sovereignty; a number of Native nations are working to create their own food codes. Native nations can conduct outreach to tribal member producers to explore whether creating tribal food safety regulations would facilitate easier commerce, or actually be a barrier, and to incorporate food producers' expertise and needs into their food codes.²⁸¹ The Indigenous Food and Agriculture Initiative (IFAI) created a model tribal food and agriculture code which tribes can adopt, modify, or build upon.²⁸² IFAI also provides support for Native nations who are working on food codes. There are numerous other ways tribes can use nutrition policy as a tool to support their food systems; in a presentation at the Fifth Annual Conference on Native American Nutrition, Julie Ralston Aoki discussed examples including creating tribal departments of agriculture, food sovereignty departments, food sovereignty strategic plans, tribal fish processing codes, tribal zoning laws, tribal tax laws, tribal cottage food laws, and funding a veggie RX system.²⁸³

F. SUPPORT KNOWLEDGE SHARING AND EDUCATION

1) Fund additional programs to support the continuation of Indigenous food systems knowledge.

Many Native nations and organizations run educational programs to share knowledge about Indigenous foodways with Native youth. This is especially important in Native communities where food producers are, as a whole, growing older—knowledge continuation is foundational to Native food sovereignty for future generations. A representative of a tribally-owned fishery in Wisconsin explained:

We're trying to create [an internship] program to prolong the activity of commercial fishing tribally. Because right now most of the guys that we deal with, [...] they're all older now. There's maybe two young guys, and that's it. You're looking at the long term, if no one's being taught this, it's not being passed down, the opportunity's just not there, how long will it last?²⁸⁴

²⁸¹ For example, a specific request from a survey participant was for tribes to "allow food truck vendors to get Mobile Health Permits to sell on Reservations." This respondent stated that "This would help a lot. It's a headache to get a health permit from a state county EPA office."

²⁸² *The Model Tribal Food and Agriculture Code*, Indigenous Food and Agriculture Initiative, www.tribalfoodcode.com (last visited August 30, 2022).

²⁸³ *Conference Videos*, Native American Nutrition, nativenutrition.umn.edu/2022-conference-videos (last visited September 15, 2022).

²⁸⁴ Zoom Focus Group Interview with anonymous (Jan. 27, 2022).

Funders should support Native-led youth and adult agriculture education programs during this crucial time period when older producers are retiring.²⁸⁵ Farmers recommended that educational programs be on-farm, hands-on and interactive, and be offered throughout the year so students can learn about seasonal differences in agricultural practices. Funders should also support Indigenous culinary education programs.

2) Create opportunities for knowledge sharing between Native business owners involved in food production or food service businesses.

As distinct from networking to make Native business connections, networking for Native knowledge sharing is critical. Native knowledge holders are an immense asset within Indian Country. Native chefs, farmers, harvesters, ranchers, and fishers have extensive expertise within their respective fields. Research participants emphasized that sharing knowledge with their peers is mutually beneficial, that they want more opportunities to do this, and that while learning from their peers' successes is useful, it is equally valuable to learn from their difficulties and failures. Native organizations can facilitate spaces for Native food business owners to connect and share. As one Native chef explained, "The feedback I get from a lot of folks doing this work is we need more spaces for folks to connect, and it can be a really isolating type of work to do sometimes. It is really important to have spaces to make these connections so that we can all support each other and knowledge share."²⁸⁶ Participants also highlighted the value of Native consultants who can provide information about their specific industry or geographic region. Native organizations or tribes could employ experienced Native food business owners as consultants to mentor newer business owners.

3) Continue to fund education and business support on topics of interest to Native food systems participants, but as a complement to direct investment in Native entrepreneurs, not at the expense of direct investment in Native entrepreneurs.

Several food producers said they would like to see more trainings, education, and business support resources offered, particularly by tribes themselves.²⁸⁷ However, this request was not ubiquitous. For example, some Native ranchers stated that educational programming is much less impactful than direct investment of funding into Native food producers, and that they would prefer to see any available funding for supporting Native producers go directly to the food producers themselves, rather than being channeled to tribal governments or organizations that provide trainings. However, other Native ranchers felt that direct investment and supportive education and business training "go hand in hand". A key takeaway is that educational programming should not be funded at the expense of direct investments into Native entrepreneurs' businesses, but rather provided as a complement to direct investments.

Useful support topics identified in interviews and focus groups include: designing, creating, and maintaining a website, particularly one that facilitates direct to consumer sales; individualized marketing support, preferably from Native consultants who are experts on finding customers in the region and industry in question; and assistance collating business documents to prepare entrepreneurs to apply quickly for relief funding during future crises. Survey participants were asked to select which, if any, kinds of support would be useful to their business—out of 29 respondents, 66% asked for marketing support, 59% for professional business planning services, 52% for financial planning, 28% for loan forgiveness, and 24% for help making a website. In open-ended responses, survey participants asked for training on marketing, accounting, budgeting, human resources, administration, e-commerce, and supply chain management, and for help with land access, finding Native customers, and applying for grants. This highlights the need for approaches that connect education with infrastructure access and financial support.

²⁸⁵ Two research participants also suggested that tribes who want to start agriculture programs could pay for a tribal member to obtain their degree or relevant education in exchange for working in the tribe's program for a set number of years. This would provide both employee security and job security, and support tribal members in applying their skills and expertise to benefit their local community.

²⁸⁶ Zoom Focus Group Interview with anonymous (Feb. 28, 2022).

²⁸⁷ Research participants also affirmed the value of existing resources and programs, such as the Intertribal Agriculture Council's trainings on USDA programs, the Sea Grant programs, and the Marine Advisory Program in Alaska, which provides HACCP training.

G. BUILD STRONG RELATIONSHIPS AND PARTNERSHIPS

1) Approach strengthening Native food supply chains with respect for building good relationships, and elevate the expertise of Native food producers.

A prominent theme from interviews and focus groups is that Native food systems participants are working from a foundation of Indigenous values that emphasize respectful, reciprocal, appropriate, and mutually beneficial relationships. Building good relationships is essential for anyone working with Native food systems participants. A key element discussed by three survey respondents is elevating the expertise of Native food producers. Involving Native food entrepreneurs in planning projects is essential to make sure programs, policy changes, and infrastructure will meet their needs and serve the growth of Native food systems. Policy makers, investors, and changemakers within and beyond the Native food sovereignty movement should visit Native producers in person to build relationships and develop an understanding of on-the-ground issues. One survey respondent explained, “Go out to visit your farmers, ranchers and sheep herders. You will see first hand what the needs are and you will be building long lasting relationships with the people who grow and raise your food. You will be a better advocate to them.”

2) Address social inequities and discrimination *within* the Indigenous food sovereignty movement.

Native food systems participants are doing extensive work to address systemic inequities and discrimination against Native and Indigenous Peoples. However, a less commonly discussed topic is the issue of inequities and discrimination that arise within the Indigenous food sovereignty movement.²⁸⁸ Three issues brought up by survey respondents are anti-blackness in Native communities, discrimination against LGBTQ individuals, and failure to recognize some non-tribally enrolled Indigenous Peoples as being Indigenous. To address these inequities, participants in Native food systems must cultivate awareness of and work to correct biases in interpersonal settings, and Native nations and organizations should adjust policies and practices to ensure equitable resource access. Funders, investors, and food sovereignty organizations can be made aware of the wide array of food entrepreneurs in the market, and the need to connect with each to support their participation.

H. EXPAND CAPITAL ACCESS AND INVESTMENTS

1) Open grant funding opportunities to for-profit businesses that are providing social value by doing community-engaged work, and provide application support to increase grant access.

As discussed earlier, creating social value is a central goal for most Native food businesses. Many for-profit Native-owned food businesses engage in community work in the same ways non-profit Native food organizations do. There is a need to shift grantmaking and philanthropic investment norms to recognize the value for-profit social enterprises create in terms of human and environmental health, social justice, economic development, and education, and to fund these enterprises appropriately. By funding these businesses, grantors can support beneficial systems change in line with their social impact goals. This report points to the significant opportunity that is missed when funders limit their grants to non-profits.

The vast majority of grants require the recipient to have 501(c)(3) status. While partnership with a fiscal sponsor is an option, this can be time consuming, business owners may not have access to these connections, and above all, requiring fiscal sponsorship is not in alignment with the fact that businesses are providing social value on their own. There is precedent for offering grants to for-profit businesses who provide demonstrable social value, for example, America’s Healthy Food Financing Initiative offered a Targeted Small Grants Program in 2021 which gave grants to for-profit food retail and food system enterprises that sought to improve access to healthy food in underserved areas.

²⁸⁸ This topic came up only within open-ended survey responses, perhaps because people felt most comfortable discussing this anonymously.

However, these types of grants are exceedingly rare in comparison to grants that require non-profit status. At the same time, this research found that grants are Native food businesses' most desired form of funding—82% of survey respondents would prefer to receive grants over loans or investments.²⁸⁹

To increase access, funders should make grants available to farms with shorter operational histories. Capital access for new producers is important, and some producers who are “new” on paper have extensive farming experience. Daisy Perez-Defoe of Birds N Things Farm explained, “Even as minority farmers we don’t qualify for a large portion of these grants because we don’t have the five years of on the books farming. Even though we’ve been farming for 7 years, we officially started Birds N Things farm last year.”²⁹⁰ Grants should also cover operating costs for community-focused entities; as a non-profit survey respondent said, “We are swamped with projects from grant funding, which is great, don’t get me wrong, but we need operating costs and a lot of these fundings don’t allow that.” Increasing awareness of existing grants is also important. Debbie Sandoval of Tiwa Kitchen Restaurant said Native organizations sharing information on opportunities allowed her to apply for grants she otherwise would have been unaware of. A food systems grant database would also be useful. Lucas Humblet of Yawelyahsi•yó• Farm explained:

[A thing I wish we had help with] would be a grant database with applicable grants to smaller scale farms. I think that we’re barred from a lot of grants compared to a lot of other farms, with our size and our filing status. We’re not a non-profit organization, and I think a lot of grants are tailored to either that or larger farms. Us trying to find those applicable grants is a challenge.²⁹¹

Native entrepreneurs also requested assistance with applying for grants. Grant applications can be too time consuming for entities with limited staff bandwidth. Native organizations or tribes could staff grant writers to provide pro bono grant writing to entrepreneurs, or provide technical assistance. The IAC’s technical assistance program covers USDA grants; assistance for other grants would be beneficial.

2) Directly fund Native food producers via loans, grants, investments, and integrated capital.

Many Native food producers cannot access adequate capital because of structural inequities. Out of 31 survey respondents, 55% said they do not have access to adequate capital to meet their business needs.²⁹² Producers are able to drive beneficial change in food systems, but to do so they need capital to support their operations and build infrastructure. Investing directly in Native food producers is critical, rather than routing funding through intermediaries like tribal governments. One rancher explained:

Your money is best served giving it to the producers for the producers to start making change. [...] If we’re going to make change in [food] sovereignty and to the supply chain, this money needs to come down into the hands of the Native businesses. And that will grow. [...] Stop doing the token gestures, stop having so many calls and meetings, put the finances in the producers’ hands, and let us run with it. That’s the only way it’s going to work. [...] There’s got to be a way that the investors that want to see change can be put in touch with the producers that are making change, and just have logistical, financial, problems getting that going. [...] And like I said, it’s from years and years of past discrimination policies and processes. We’ve got so many hoops to jump through.²⁹³

²⁸⁹ This percentage is out of 17 survey respondents who said they did not have adequate capital to meet their business needs. These respondents were then asked what kind of capital they would most like access to. Interview and focus group data support that entrepreneurs are interested in grants. Survey participants also asked for grants in open-ended survey responses, saying “Yes, please open grants to native small businesses,” “Help to obtain grants to develop our training and internship program for other tribes,” and “Help with Grants!”; survey respondents also said there is a need for grants for community education programs, community food distribution, and non-profit organizations addressing food supply.

²⁹⁰ Phone Interview with Daisy Perez-Defoe and Rusty Defoe, Owners, Birds N Things Farm (Oct. 21, 2021).

²⁹¹ Phone Interview with Lucas Humblet, Co-owner, Yawelyahsi•yó• Farm (Oct. 21, 2021).

²⁹² Interview and focus group data also indicate that there is a significant need for capital. Native organizations such as the Native American Agriculture Fund and the Intertribal Agriculture Council also emphasize this point.

²⁹³ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

To strengthen Native food systems, Native organizations and tribes should assist with connecting investors to Native producers, and funders should prioritize direct investment. Another rancher explained:

The issues are, even with the federal dollar, it always has to go through the tribe first before it gets down to the producer, and the tribe can hold it up for years or months or as long as they want to. Why doesn't that money go directly to the rancher? Farm Service as an agency or USDA, when they work with a non-tribal rancher, that money goes directly to the rancher. They don't need to have it go through the tribal process and then that's another hold up before it gets to the producer. Those are barriers that make it very difficult for the cow-calf operator to even get by, let alone look at the next step to being able to produce those feeder calves and those stockers for the next stage. [...] The money needs to get to the tribal producer. It has to. If it doesn't get to the tribal producer, this conversation, and others that we had, are fruitless.²⁹⁴

Survey respondents made similar points. Direct investment supports producers to expand into other levels of the supply chain, to scale their businesses, and to increase the supply of Native-produced foods, all of which strengthen Native food supply chains.

3) Support expanded CDFI access across Indian Country to address under-banking of tribal communities and ensure equitable access to federal programs administered via commercial lenders.

Native businesses are still encountering discriminatory lending practices. For example, Rudy Madrigal, owner of Coast Salish Seafood, experienced discrimination when he sought a loan for a commercial fishing boat from four different banks. Rudy also said in his experience, some banks and Native lending firms require higher payments, higher interest rates, and more collateral from Native applicants.²⁹⁵ Being rejected for loans or receiving inequitable loan terms compared to non-Native businesses is a form of discrimination that can prevent or slow the growth of Native businesses—this systemic racism must be remedied so Native food businesses can access adequate capital to flourish. Furthermore, many Native communities are underbanked; this is a significant barrier to capital access. Expanding access to Native CDFIs, either locally or nationally, is a way to address these issues. Native CDFIs can provide culturally appropriate service, offer low interest rates, and utilize Native metrics to evaluate credit-worthiness. CDFI access varies widely across Indian Country. There are 70 Native CDFIs in the US, however, the vast majority limit their services to a certain tribe or geographic area—only 13 either explicitly offer services to Native entrepreneurs nationwide, or don't specify a service area. For Native entrepreneurs who do not have a CDFI in their region, access is limited.

Research participants discussed the value of Native CDFIs.²⁹⁶ For example, rancher Kassandra Dickerson is starting a butcher shop to increase access to processing in her region. Finding a loan with low interest rates was hard, but she eventually found one through a Native CDFI in South Dakota:

Opening this new butcher shop, I looked for any type of loans, and some of them had skyrocket high interest rates. [...] Some of them were 16 to 25%. There's not even a way that I could make money doing that. So that tribe in South Dakota, they have a small program, it's up to \$100,000. Great tribe to work with. [...] They're doing it for people that want to start up a Native business. [...] It goes right directly through them, it's a personal loan, it's perfect. If there were more programs like that, I think we'd have a lot more Native-owned businesses. *A lot more.*²⁹⁷

Numerous research participants also said they would like their tribes to offer loans, grants, or investments to tribal members' food businesses. Creating a CDFI is one mechanism for this. Increasing investments in existing Native CDFIs, especially those that serve Native food producers, like Akiptan, is also important.

²⁹⁴ Zoom Focus Group Interview with anonymous (Nov. 19, 2021).

²⁹⁵ Loans can also be complex for Native farmers operating on tribal land, because it is more difficult to use land that is held in trust by the federal government as collateral.

²⁹⁶ Survey participants also discussed this topic, for example one suggested "Find and encourage funding for CDFI for zero-interest revolving loan programs for farmers unable to gain access to credit and capital markets, and other mutual aid programs."

²⁹⁷ Phone Interview with Kassandra Dickerson, Owner, Mountain Lake Cattle (Oct. 27, 2021).

Expanding CDFI access also supports equitable access to federal funding. For example, the USDA created the Food Supply Chain Guaranteed Loan Program to finance the start-up or expansion of activities in the middle of the food supply chain. This is a step towards strengthening food supply chains, however, because guaranteed loans are administered by commercial lenders, underbanked Native communities will not have the same access to these loans as other communities will. Underbanking and discriminatory lending may reduce the effectiveness of federal programs within Indian Country; expanding Native CDFI access is one way to increase equity. Federal loan programs should also develop more equitable ways of distributing capital that do not rely on commercial lenders, such as direct lending.

4) Investors should consider the benefits of investing in Native food businesses, such as monetary return on investment, social return on investment, and strengthening Native food sovereignty.

The primary funding options for Native food entrepreneurs are currently federal loans and grants, traditional loans, and CDFI loans.²⁹⁸ The limited options beyond debt-based capital constitute a significant gap in the funding landscape; investors are well positioned to fill this gap. Values-aligned venture capital investors and social impact investors would benefit from including Native-owned food businesses in their portfolios. There is both strong economic value and significant social value being created by Native businesses. This research found that there are ready markets for Native products, and that expanding the supply of Native-produced food is necessary to fulfill unmet demand from Native nations, organizations, restaurants, and consumers; federally funded food procurement programs; and non-Native customers. With capital access Native food businesses can scale to meet this demand and become highly profitable.

Native entrepreneurs are interested in investment capital. Research participants said non-Native investors are welcome and encouraged to invest in Native food businesses, provided they can maintain good relationships and invest in appropriate ways. Research participants are also interested in investments from tribal governments, Native investment firms, and Native venture capital firms. For example, a survey participant said to build Native supply chains, we'd need to "Encourage more Native venture capital in CPG" (consumer packaged goods). Currently there are very few forums for Native entrepreneurs to connect with potential investors. To address this, Native organizations can take on a networking role to connect entrepreneurs to values-aligned investors, and investors can interface with tribes and Native organizations to publicize that they are looking to invest in Native-owned businesses.

5) Both loans and investment capital must be provided in appropriate ways given the contexts Native entrepreneurs are operating in.

It is necessary for investors/lenders to educate themselves about the contexts Native entrepreneurs operate in. Many Native people have experienced economic exclusion, financial trauma, investment trauma, or predatory lending. Investors/lenders should utilize a trauma-informed approach. This can include embracing underwriting formats based on Indigenous values, such as the "5 Rs of Rematriation" described by Jaime Gloshey of Native Women Lead,²⁹⁹ and/or utilizing values-aligned impact metrics that recognize social value and ecosystem services as return on investment. Investors can also look to Native CDFIs and Native investment firms for examples of how to invest appropriately. Investors should learn about the complex legal statuses of Native lands; the Indian Land Tenure Foundation provides resources on this.³⁰⁰

It is vital for investments to be structured appropriately. Having autonomy and self determination in their businesses is important to many Native entrepreneurs. Retaining Native ownership of food businesses is essential to food sovereignty; equity investments must be structured to protect the entrepreneur's ownership of their business.

²⁹⁸ We conducted a landscape analysis of the business support resources available to Native food systems entrepreneurs which looked at 235 resources, and these are the primary types of capital opportunities we found.

²⁹⁹ Jamie Gloshey, *Challenging the 5 Cs of Credit: A Vision for Rematriating Capital*, *The Nonprofit Quarterly* (November 2021), nonprofitquarterly.org/challenging-the-5-cs-of-credit-a-vision-for-rematriating-capital.

³⁰⁰ Indian Land Tenure Foundation, itf.org (last visited June 29, 2022).

Research participants said investor transparency is crucial, and terms cannot include stipulations they are uncomfortable with.³⁰¹ Entrepreneurs also expressed concern, often based on past experiences,³⁰² that lenders or investors will exert an inappropriate level of control over how they run their business. Farmers, ranchers, harvesters, and fishers work in close relationships with plants, animals, and ecosystems; they are experts who know how to produce high quality food in sustainable ways. Some Native food producers are concerned that investors will push them away from sustainable practices or discourage them from using Indigenous agricultural knowledge in their work. The issue of investors micromanaging Native-owned businesses came up several times in this research and points to the detrimental effect of capital infusions that include stipulations that aren't informed by business owners' on-the-ground expertise. To be appropriate partners, investors must agree to the deal structures advocated for by Native food producers. Investors and lenders must respect that Native entrepreneurs would often like to retain legal and operational ownership of their businesses.

³⁰¹ Some said they would like to see loans or investments have clear, straightforward, and up front terms, for example providing funding for a specific piece of equipment or infrastructure, or providing capital for the food producer to utilize in any way they see fit.

³⁰² For example, Izetta Thompson closed her fish processing plant after 10 years in part because she had taken investment from a local Native corporation, and the corporation was making decisions about her business operations which made it difficult to continue running the business. This led to a loss of valuable supply chain infrastructure, as the plant is now sitting unused.



On-farm education at Birds N Things Farm. Photo courtesy of Daisy Perez-Defoe and Rusty Defoe, owners of Birds N Things Farm.

CONCLUSION

Native food businesses are creating food systems that care for both Native and non-Native people, guided by Indigenous values and self-determination. This report has highlighted Native food systems participants' pronounced interest in cultivating and expanding intra-tribal, local, regional, and national Native food supply chains. In addition to being a vital approach to enacting Native food sovereignty, Native food supply chains bring relational, cultural, environmental, and economic value to their participants and to Native nations.

The recommendations put forward in this report highlight how systemic racism and inequitable access to capital continue to have profound and far reaching impacts on Native food systems—from lack of infrastructure to limited personnel bandwidth, many of the barriers limiting the current supply of Native produced foods can be addressed through creating sustained and equitable access to capital. The creation of Native cooperatives, distributors, or food hubs is another important step towards facilitating large-scale Native supply chain logistics. Additionally, policy makers, investors, and changemakers within and beyond the Native food sovereignty movement should involve Native food entrepreneurs in project planning—this is essential to make sure programs, policy changes, and infrastructure will meet food entrepreneurs' needs and serve the growth of Native food systems. Taken together, all of the recommendations in this report may create new and formidable access to markets for Native food producers, and facilitate the expansion of Native food supply chains.

At the broadest level, Native food producers are creating immense social value through their work, guided by Indigenous values that see the interconnections between Native food systems and individual, social, and environmental wellbeing. Supporting Native food producers to expand their work, and to connect through Native supply chains which support other Native food businesses, will multiply this social value and promote Native food sovereignty in the present and for future generations.

APPENDIX: ADDITIONAL SURVEY DATA

This appendix presents additional survey data that is not covered in the body of the report.

40 respondents provided the tribal affiliations of the primary business owners. For businesses owned by individuals, these are: Navajo (3 respondents), Lumbee (2 respondents), Pomo (2 respondents), HoChunk, Standing Rock Sioux, Dakota, Maliseet and Penobscot, Red Cliff Band of Lake Superior Chippewa, Laguna Pueblo and Comanche, Anishinaabe, Ohlone, Pawnee, Choctaw Nation of Oklahoma, Colville Confederated Tribes, Haida Tsimshian Tlingit, Self Meskwaki, Cherokee and Blackfeet, Northern Cheyenne, Samish Indian Nation, Yakama Nation, Confederated Tribes of Warm Springs, Choctaw, Kickapoo and Nahua, Seminole Tribe of Florida, Hawaiian, Oneida, and Shoshone Paiute. For businesses owned by tribes/nations, these are: Red Cliff Band of Lake Superior Chippewa, Spirit Lake Tribe, Confederated Tribes of Warm Springs branch of Natural Resources, Little Traverse Bay Band of Odawas, Chickasaw Nation, Winnebago Tribe of Nebraska, Mi'kmaq Nation formerly known as the Aroostook Band of Micmacs, Yakama Nation, and the Yakama, Warm Springs, Umatilla and Nez Perce Tribes.

Out of 35 respondents, the ages of the primary business owners are as follows: 11% 25-34, 20% 35-44, 34% 45-54, 26% 55-64, 9% 65-74.

Out of 33 respondents, 76% have one operating location for their business, and 24% have multiple operating locations. Out of the 25 respondents with one operating location, 64% are located on a reservation or other tribally-owned lands and 36% are not. Out of the 8 respondents with multiple operating locations, 13% have both locations on a reservation or other tribally-owned lands, 38% have one location on a reservation or other tribally-owned lands and one location not, and 38% have two locations not on a reservation or other tribally-owned lands.

Respondents' annual revenue and annual profits are detailed in the tables below.

Survey Respondents' Annual Revenue		
Revenue, in dollars	Number of respondents	Percent of respondents
0	4	12%
1-999	4	12%
1,000-9,999	3	9%
10,000-24,999	2	6%
25,000-49,999	2	6%
50,000-99,999	8	24%
100,000-499,999	5	15%
500,000-999,999	3	9%
1,000,000-9,999,999	2	6%
10,000,000-24,999,999	1	3%
25,000,000-49,999,999	1	3%
Total number of respondents	35	

Survey Respondents' Annual Profits		
Profit, in dollars	Number of respondents	Percent of respondents
0	9	31%
1-999	3	10%
1,000-9,999	1	3%
10,000-24,999	5	17%
25,000-49,999	7	24%
50,000-99,999	1	3%
100,000-499,999	2	7%
500,000-999,999	1	3%
Total number of respondents	29	

Out of 38 respondents, entity structures are as follows: 34% limited liability company (LLC), 24% nonprofit corporation, 18% sole proprietorship, 13% for-profit corporation, 5% limited partnership (LP) or limited liability partnership (LLP), 5% cooperative.

Out of 38 respondents, the number of employees are as follows: 26% the owner is the only person working at the business, 26% 1-2 employees, 18% 3-5 employees, 16% 6-10 employees, 5% 11-25 employees, 5% more than 100 employees, 3% 26-50 employees.

Out of 27 respondents, business social media use is as follows: 22% use Twitter, 30% use Youtube, 37% use LinkedIn, 78% use Instagram, and 89% use Facebook.

Out of 8 respondents who do distribution, 88% distribute items that are packaged for individual sale, and 75% distribute items that are packaged in bulk. 50% of respondents are involved in pickup, 88% are involved in storage/warehousing, and 100% of respondents are involved in delivery. To distribute products, 50% of respondents transport items via USPS, UPS, or FedEx, 25% use vehicles operated by independent contractors, and 75% use vehicles operated by employees of their distribution business.

Respondents are selling to multiple subsets of customers simultaneously. Out of 36 respondents, 83% sell to local community members, 78% sell to Native individuals, 53% sell to tourists or visitors, 50% sell to Native organizations, and 47% sell to Native businesses.

When asked which of these groups makes up the largest proportion of their customer base, out of 37 respondents 46% said local community members, 24% said "another group", 14% said Native individuals, 8% said Native organizations, 5% said tourists or visitors, and 3% said Native businesses.

Respondents who are selling to Native organizations or Native businesses were asked how many they sell to, out of 20 respondents 70% sell to between 2-9, 20% sell to 10-20, and 10% sell to 100-200. Of the last group, one is a tribal food distribution program and the other is an agriculture equipment provider owned by a Native individual.

Respondents who source from Native producers were asked how many they source from. Out of 10 respondents, 40% source from between 1-3 producers, 30% source from between 4-10 producers, and 30% source from 19 or more producers.

Items that participants would like to be able to source from Native suppliers but currently cannot include: a larger variety of products, pinto beans, fresh produce, produce, greens, water fowl, farm supplies, kitchen supplies, office supplies, maple syrup, cranberries, apple cider, seed, tools, packaging materials, beeswax, maize, mussels, organic juices, adaptogens, hardware, feed store, irrigation supplier, "seed suppliers are very limited", custom fabrication, vendors to supplement CSA with eggs, baked goods, mushrooms, flour, sugar, grant assistance, "absolutely everything", seeds, heirloom blue corn for molino and masa harina operation; foraged items (chokecherry, wild currant, gooseberry, etc; medicinal herbs); prepared foods, beef, popcorn, more heirloom products and seeds, hemp made serving ware, traditional foods, regional specialties, fishing equipment (nets, life jackets), almond butter, coconut oil, nuts.

26 respondents who listed items (above) that they would like to source from Native suppliers but currently cannot were then asked why they aren't able to source those items from Native suppliers. 52% said no one is offering those items, 24% said the items aren't available in large enough quantities, 16% said they need to make sourcing connections or don't know how to find the producers/items, and 12% said "Other reason".

32 respondents answered whether any of the following factors prevent them from participating in a Native supply chain, answers are as follows: 53% "There are no Native food processing facilities in my area", 53% "I can't locate Native businesses to buy from", 47% "When I price my products in a way that is equitable/profitable for my business, it becomes difficult for Native businesses or consumers to buy my products", 44% "Native businesses aren't offering the ingredients/inputs that I need", 34% "The products sold by Native businesses aren't available in large enough quantities", 31% "I can't locate Native businesses to sell to", 16% "I can't access the necessary transportation logistics", 13% "The products sold by Native businesses are too expensive".

Respondents whose businesses were negatively impacted by the pandemic were asked to describe those negative impacts. Responses were as follows: "Sending fish out to other processing facilities including Michigan and Canada," "Our income came from catering, so we stopped operating and focused on agriculture for a year and a half, doing minimal cooking. We have been able to operate on a small level to maintain expenses, but can't wait to start making significant income again to fund our program," "I could Not sell my food at the food stands but we pivoted by opening up an online store to sell Frybread mix and Tortilla Grills," "raw materials used and packaging cost went up and continues to rise, almost on a weekly basis," "We went thru a 100 day shutdown when the pandemic first started. And a couple of other brief closures. During that time the revenue stream prevented us from purchasing many of the raw materials needed for production. Distribution continues to struggle. Tourism, however was up in our area which had a significant positive effect on our business," "People stopped eating out, we stopped catering," "The value of landings decreased by approximately 40%," "Staffing cuts and the inability for staff to work at the same time created efficiency problems," "very difficult to demonstrate products in person (in stores). Customers not shopping in stores to discover new products. Events where products would be featured were canceled," "No ceremony so don't need my corn," "Could not travel to do my work," "The fuel prices were high, calf prices were extremely low, hay prices more then doubled, trucks are hard to find, drought and grasshoppers compounded the problem. I could not get adequate labor to do day to day jobs," "customer base decreased," "No tourist sales, restaurants did not buy, no celebrations, weddings, graduations, no social events for the salmon to attend," "covid closures forced me to market more online," "Equipment availability from the OEM's," "Difficult to gather and produce products with collective medicine makers," "Unable to solicit volunteers for harvesting, processing, and distribution of products. Most of the 2020 harvest was unused. Was repurposed for mulching," and "The Oneida Nation discontinued catering for functions, food summits and gatherings were stopped."

Respondents whose businesses were positively impacted by the pandemic were asked to describe those positive impacts. Responses were as follows: "The demand for local produce and native goods increased instantly, "Sales on local fresh veg are up all around. Shipping and distribution slowdowns have given a boost to local foods," "Since the R&R Market (founded 1857) is the only full service grocer-hardware between Alamosa (50 mi NW) and Taos (60 mi S), many of our customers decided to avoid shopping out of town and opted to shop local. The customer base has grown according to the 2020 census," "Reservation lockdown prevented travel," "Higher demand for my product," "opened up a food box program," "increased sales of fresh produce through hunger programs du to increased funding that focused on local production. less product from out of the country," "We've built many community partners both locally and with state agencies to address some of the disparities that have plagued our people for years," "We started a community supported agriculture," and "We saw an influx in online orders for the Acorn Bites because we were unable to participate in farmers markets and in person events."

Out of 35 respondents, 89% of businesses were in operation before the pandemic started, and 11% of businesses started during the pandemic.

When asked whether they adapted their business in any of the following ways, 32 respondents answered as follows: 25% Didn't make any changes to their business models, 19% switched to direct to consumer sales, 16% started selling online for the first time, 16% created a website for their business, 13% expanded online sales, 6% switched to wholesale, and 44% adapted in another way. Those who adapted in another way described their adaptations as follows:

"Had Oregon Sea Grant promote our Tribal fisheries," "sold to hunger programs," "Attempted grass roots volunteer solicitation to address rise in food demand for community distribution. Unable to do so because of local pandemic protocols as well as decreased profit margin," "Our grower coop unit started supplying the R&R with fresh produce, chicos, bolitas," "door delivery," "Social distancing, mask wearing and keep customers from certain areas," "Friends in need," "Offering Home Delivery," "Volunteers showed up and now we are seeking funding to be able to provide good wages and benefits," "Added a CSA in 2020," "While we were closed to the public for indoor cocktails, we offered curbside pickup for bottle sales and moved cocktail sales outside with fire pits and tables. The local community gave tremendous support for all local small business," "Offered delivery and no-contact pick ups," and "Zoom presentations/demos."

Respondents who said they lost revenue during the pandemic were asked to estimate how much revenue their business lost because of the pandemic. Responses are detailed in the table below. Each row is an estimate of lost revenue provided by a respondent, shown in dollars and as a percentage of that business’s revenue.

Survey Respondents’ Estimates of Revenue Lost by their Businesses during the COVID-19 Pandemic	
Amount of revenue lost, in dollars	Percentage of revenue lost by that business
1,000,000 (in 2021)	8%
5,000	12.5%
40,000-50,000 (in the first year of the pandemic)	13%-17%
665,000	22%
8,000,000	27%
50,000	50%
2-3 million	50%
4000	80%
617,500	95%
50,000	100%
60,000	120%
25,000	1000%

Additionally, one respondent with an \$18,000 annual revenue said they lost “most of my business”, a respondent with \$150,000 annual revenue said “30% 2020 recovered last year to 2019 numbers”, and a respondent with \$65,000 annual revenue said “retail revenue decreased; online sales increased.”

Respondents who said they gained revenue during the pandemic were asked to estimate how much revenue their business gained because of the pandemic. Responses are detailed in the table below. Each row is an estimate of gained revenue provided by a respondent, shown in dollars and as a percentage of that business’s revenue.

Survey Respondents’ Estimates of Revenue Gained by their Businesses during the COVID-19 Pandemic	
Amount of revenue, in dollars	Percentage of revenue gained by that business
10,000	1.5%
40,000-50,000 (in the second year of the pandemic)	13%-17%
16,250	25%
2,500,000	25%
3,000,000 (in 2020)	25%
30,000	33%

Additionally, one respondent with a \$50,000 annual revenue said they gained “zero because of the pandemic. My business increased revenue only because it was started in 2019 and had plans to grow in 2020 and 2021.”

Respondents were asked open-ended questions about their recommendations on how to build or strengthen Native supply chains, what would need to happen for them to become more involved in a Native supply chain, whether there anything specific that Native organizations or policy makers could do to support their businesses right now, and whether there was anything they’d like to add about any of the topics in the survey. This data is not presented in its entirety, but responses touching on several themes are included below.

Open-ended responses that discussed investing directly in producers include: “Offer economic support to the smaller producers who need the income to continue to do the work they are,” “Show me the money that’s needed that will allow farmers to grow more food,” and “Don’t give the federal funds to our tribal governments as they take too long to implement projects, infrastructure projects and make the process to get the funding too frustrating that you give up. Give funds directly to the farmers or groups that can make action happen.”

Open-ended responses that discussed regional hub models include: “I think reestablishing trade routes between tribes. Distribution hubs in different regions of turtle island,” “CDFI support for regional producer exchange hubs,” “Creating food hubs in each community,” and “Create a network of regional grocery-grower cooperatives focused on food sovereignty and community health.”

Open-ended responses that discussed the need for networking resources include: “Make sure all Native owners are listed in Native directories”, “build mutually beneficial relationships, trading connections, [...]” “a website (if one doesn’t already exist) that lists Native businesses and contact info,” “Community food production index,” “I think promoting Native food producers on larger scale would be beneficial to our business right now,” “better knowledge of native producers,” “Native contacts for new sales,” “Need to know who produces what,” “Being able to find Native owned companies,” “Networking with other Indigenous producers,” “I would need to know which businesses are Native in my area,” and “We need to get organized. There are many of us that transport goods all over turtle island but we need to develop a stronger collaboration.”



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Image credits (l-r): Tocabe: An American Indian Eatery's Indian Taco with braised shredded bison, hominy, and roasted green chiles, photo courtesy of Ben Jacobs and Matt Chandra, co-owners of Tocabe: An American Indian Eatery; Chef Nico Albert's Grape Dumpling Sundae, photo courtesy of Nico Albert, owner of Burning Cedar Indigenous Foods; Tocabe: An American Indian Eatery's Posu Bowl with wild rice and pinto beans, photo courtesy of Ben Jacobs and Matt Chandra, co-owners of Tocabe: An American Indian Eatery; Chef Nico Albert's Bean Bread, photo courtesy of Nico Albert, owner of Burning Cedar Indigenous Foods.



First Peoples Worldwide
UNIVERSITY OF COLORADO BOULDER

First Peoples Worldwide works from a foundation of Indigenous values to achieve a sustainable future for all.

First Peoples Worldwide is an Indigenous-led organization that translates on-the-ground impacts of investment affecting Indigenous Peoples to corporate decision makers through the intersection of business, law, and finance. Having started the flywheel of Indigenous-centered corporate engagement in the 1990s, First Peoples Worldwide is now a leader in deploying strategies to move the market towards respect for the rights of Indigenous Peoples. By building the business case for Indigenous rights and wellbeing, First Peoples Worldwide increases corporate accountability, facilitates investor engagement aligned with Indigenous priorities, and supports Indigenous leadership to achieve self-determined economic goals.

First Peoples Worldwide

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