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Arizona Agriculture

OFFICIAL PUBLICATION OF THE ARIZONA FARM BUREAU

November/December, 2025 Volume 78 No. 9

A CONVERSATION ON THE ECONOMICS OF CONSUMERS' FOOD SPEND: DANNY MUNCH

By Julie Murphree, Arizona Farm Bureau Director of Strategic Communications

Danny Munch works as an Economist within AFBF's public policy department with a profile that covers issues including dairy markets, transportation & infrastructure, disaster assistance, aquaculture, endangered and invasive species, public lands, and specialty crop markets.

Born and raised in the New England shoreline town of East Lyme, Connecticut, Munch was an active 4-H member and heavily involved with Northeast agriculture. After graduating from UConn in 2018 with a double major in Livestock Management & Policy and Resource Economics he worked within the U.S. House of Representatives on agricultural policy research for Connecticut's second congressional district on Capitol Hill.

In 2020, Munch graduated from Cornell University with a Master of Science in Agricultural and Food Economics. Throughout his graduate career, Munch was heavily involved with providing valuable strategy insights to farmer-owned cooperatives and agribusinesses, including hands-on projects with Ocean Spray, Palabana Fisheries (a tilapia producer in Zambia, Africa), and with Farm Credit East.

Prior to joining the American Farm Bureau Federation, Munch worked as a protein market commodity analyst for Urner Barry, focusing on protein crop markets.

Because of his coverage in this critical area of consumer spending, we felt his insights and especially as it related to Arizona would be a good fit for our conversation series. These more Arizona-centric questions were developed as a result of Danny Munch's Market Intel article, "From Grocery Carts to Doorsteps: 2024 Food Spending."

***Arizona Agriculture:* Given the article's discussion on regional variations in food spending, where does Arizona rank in per capita food-at-home expenditures compared to states like Idaho and Montana, and how do factors like Arizona's mix of urban centers (e.g., Phoenix) and rural agricultural areas influence these patterns?**

Munch: Idaho and Montana are among the highest per-capita food-at-home (FAH) states in the country, a pattern we tie to colder climates, longer travel distances and more rural lifestyles that favor stocking up and cooking at home. Frankly it's often just more difficult to eat out in more sparsely populated regions.

Arizona sits below those Mountain West outliers with the Phoenix–Tucson urban corridor tilting their consumption mix toward food-away-from-home (FAFH) and convenience purchases. In contrast, Arizona's rural counties (e.g. Yuma, Pinal, Cochise, La Paz) typically look more like high-FAH states: longer distances to dense restaurant clusters, fewer delivery options, and more planned 'stock-up' grocery trips mean a larger share of meals are cooked at home.

***Arizona Agriculture:* The article highlights the surge in food delivery spending to over $100 billion in 2024, driven by convenience. How has this trend specifically impacted Arizona's grocery and delivery markets, particularly in high-growth areas like the Phoenix metro region, and what opportunities or challenges does it present for Arizona farmers and ranchers in the state?**

Munch: Phoenix is one of the nation's fastest-growing metros, which is exactly where app-based delivery scales the quickest. Maricopa County added 57,471 residents between July 2023 and July 2024 (more than double the prior year's increase) expanding the accessible market for rapid grocery and prepared-meal fulfillment. At the same time, the region is becoming somewhat of a testing case for grocery automation.

For example, Kroger's Ocado-powered robotic fulfillment center in Phoenix is slated to come online in fiscal 2026, signaling a continued shift toward high-volume, off-site picking to serve delivery and pickup at metro scale.

The delivery boom is a "bigger front door and a faster clock." The bigger front door means your beef, dairy, greens or nuts can reach more Arizona families without fighting for a grocery shelf. The faster clock means orders come late in the day and buyers want consistent packs that are easy to pick and ship. The practical moves can include offering ready-to-cook or ready-to-serve packs in predictable sizes, keeping labels and instructions clear, and agreeing on firm cut-off times with buyers. If you're smaller, team up with a nearby packer so everyone's product rides into town together. The hard parts are prices that are visible across every app and demand that jumps on weekends or during big events. Building a little cushion into your pricing, keeping a short weekly check-in with your buyer, and adjusting volumes as you learn SEE **ECONOMICS OF CONSUMERS' FOOD SPEND** PAGE 5

YOUR MEMBERSHIP DOLLARS AT WORK ON LEGAL ADVOCACY

By Chad Smith, Arizona Farm Bureau Director of Government Relations

Our membership due's structure is important not only to Arizona Farm Bureau but also to the work that American Farm Bureau Federation does on agricultures behalf. We don't share often enough all the great work that our colleagues at American Farm Bureau are doing on our behalf.

Part of that work includes legal advocacy, while they cannot possibly engage in every legal battle to protect agriculture they do so strategically and through a due process. I had the opportunity for a couple years to serve on the American Farm Bureau General Counsel Advisory Committee, where committee members from various State Farm Bureaus engage in strategy and deliberate legal advocacy on behalf of American agriculture. Legal advocacy is another great value to your membership dollars and the work that the team of attorneys at AFBF does is important to the mission of Farm Bureau.

Below, Travis Cushman, Deputy General Counsel, Litigation & Public Policy at American Farm Bureau has provided an update on recent court decisions along with ongoing case updates.

COURT DECISIONS

Emergency Planning and Community Right-to-Know Act (EPCRA) – Rural Empowerment Association for Community Help v. EPA (D.D.C.)

In a big win, the D.C. District Court ruled that routine manure emissions do not trigger emergency reporting requirements. Environmental groups had challenged EPA's 2019 EPCRA rule, which exempted farms from filing EPCRA reports, and we have been defending the rule alongside the National Cattlemen's Beef Association, National Pork Producers Council, and U.S. Poultry & Egg Association.

Importantly, the court affirmed that because Congress expressly exempted animal waste air emissions from CERCLA reporting under the FARM Act, such releases do not "occur in a manner" that would require reporting under EPCRA. The court also found that EPA provided a reasoned explanation for the rule and that NEPA did not apply because the agency lacked discretion to do otherwise. This is a significant and hard-fought victory for farmers, affirming that routine emissions from animal waste do not trigger emergency reporting obligations designed for industrial chemical spills.

CASE UPDATES

California Climate Disclosure Rule – U.S. Chamber of Commerce v. California Air Resources Board (C.D. SEE **YOUR MEMBERSHIP DOLLARS AT WORK** PAGE 7

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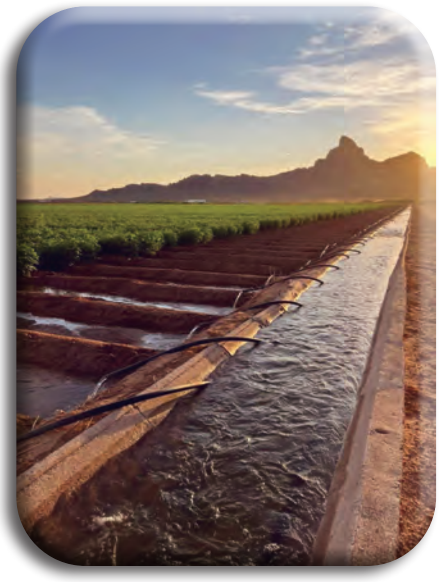
PERIODICALS

A GENERATIONAL DIVIDE IN ARIZONA'S WATER FUTURE

By **Daniel Harris,** Arizona Farm Bureau Government Relations Manager

A recent poll of registered Arizona voters provides new insights into public perspectives on Colorado River water use, agriculture, and growth. Results were weighted by age, gender, region, ethnicity, party affiliation, and educational attainment to accurately reflect Arizona's voter demographics.



Findings from this research show that an overwhelming majority of Arizona voters continue to support agriculture's access to water, notable differences in opinion are emerging between generations. Younger voters are more likely to view water use through the lens of urban growth, sustainability, and economic development, suggesting gradual shifts in public attitudes toward water allocation and resource priorities across the state.

BROAD SUPPORT FOR AGRICULTURE'S ACCESS TO WATER

Across all demographics, a large majority of Arizona voters consider maintaining agricultural access to Colorado River water important for food production and economic stability. 87% of voters statewide say it is important that farmers and ranchers continue to have access to this supply for food production.

Support is strongest among Republicans (95%) and voters aged 65 and older (95%), with somewhat lower but still substantial support among Democrats (86%) and Independents (80%). In Arizona's two largest metropolitan counties, Maricopa (87%) and Pima (90%), most respondents also view agriculture's water access as a key priority.

Overall, these results indicate that agriculture maintains high public credibility and remains broadly viewed as an essential part of Arizona's water and food systems.

DIFFERENCES BY AGE AND POLITICAL AFFILIATION

When voters were asked whether water should be reallocated from rural areas to cities, responses revealed clear generational differences. Roughly half of all voters (50%) oppose transferring agricultural water to urban development. However, younger adults aged 18-29 and 30 to 44 are significantly more open to this idea, with 28% and 44% expressing support respectively, compared to only 18% among voters aged 65 and older.

This represents a generational gap of more than 25 percentage points. Among political affiliations, Republicans show the highest opposition to reallocations (59%), while Democrats and Independents are more evenly divided, each with about 46% opposed and a larger portion undecided.

These findings suggest that while overall support for agriculture remains strong, younger voters are more likely to prioritize urban growth and development in future water policy discussions.

DEMOGRAPHIC AND CULTURAL CONTEXT

Generational differences in perception appear to align with demographic and geographic trends. Older voters are more likely to have direct experience with Arizona's agricultural communities and infrastructure, including irrigation systems and canal networks that have supported farming in the state's arid environment for more than a century.

Younger Arizonans, who are more likely to live in urban or suburban settings, tend to view water use within the context of sustainability, housing, and economic expansion. Their focus is often on ensuring water availability for population growth, infrastructure, and technological development.

These contrasting perspectives may reflect Arizona's ongoing urbanization. As a greater proportion of residents live in cities and have less direct connection to agriculture, differences in experience and lifestyle increasingly shape how voters assess the balance between rural and urban water needs.

IMPLICATIONS FOR FUTURE WATER POLICY

While the data indicates that agriculture continues to have strong public support across political and regional lines, it also points to potential shifts in how future generations approach water management. Younger voters' openness to reallocating water resources suggests that discussions about water policy may become more competitive over time, especially as population growth and economic expansion increase pressure on limited supplies.

Opinions about water allocation are less firmly held among younger and unaffiliated voters. These groups could be influenced by future conditions, policy proposals, or communications emphasizing either conservation or development priorities.

AGRICULTURAL EFFICIENCY AND TECHNOLOGICAL ADOPTION

Arizona's agricultural producers continue to implement water-efficient technologies and management practices designed to maximize productivity while conserving limited supplies. Drip irrigation, laser-leveling, soil moisture monitoring, and water recycling systems are now widely adopted across many farming operations. These tools reduce water use and improve precision, reflecting the industry's commitment to sustainable production.

This progress aligns with broader conservation efforts throughout the Colorado River Basin. Although agriculture accounts for a large share of the region's total water use, the sector has demonstrated measurable efficiency gains over recent decades. These developments show that agricultural and urban water management strategies are increasingly connected through shared goals of sustainability and long-term supply security.

CHANGING VOTER DYNAMICS

Arizona's continued population growth and the upcoming renegotiation of Colorado River operating guidelines after 2026 will keep water allocation at the forefront of public policy discussions. As younger voters make up an increasing portion of the electorate, their views on how to balance agricultural and urban water demands will likely influence both legislative and regulatory outcomes in the future.

The generational divide identified in this data suggests that while agriculture enjoys strong current support, long-term public backing will depend on maintaining awareness of its economic and environmental role within Arizona's broader sustainability framework.

CONCLUSION

While the polling shows public opinion in Arizona remains strongly supportive of maintaining water for agricultural use, as Arizona becomes younger and more urbanized, perspectives on water management may evolve. Agriculture continues to be viewed as a trusted and valuable part of the state's economy, but future policy discussions will likely hinge on how effectively the agricultural sector's role in food production, conservation, and local economies is communicated and understood by the next generation of Arizona voters.

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The Voice of Arizona Agriculture www.azfb.org

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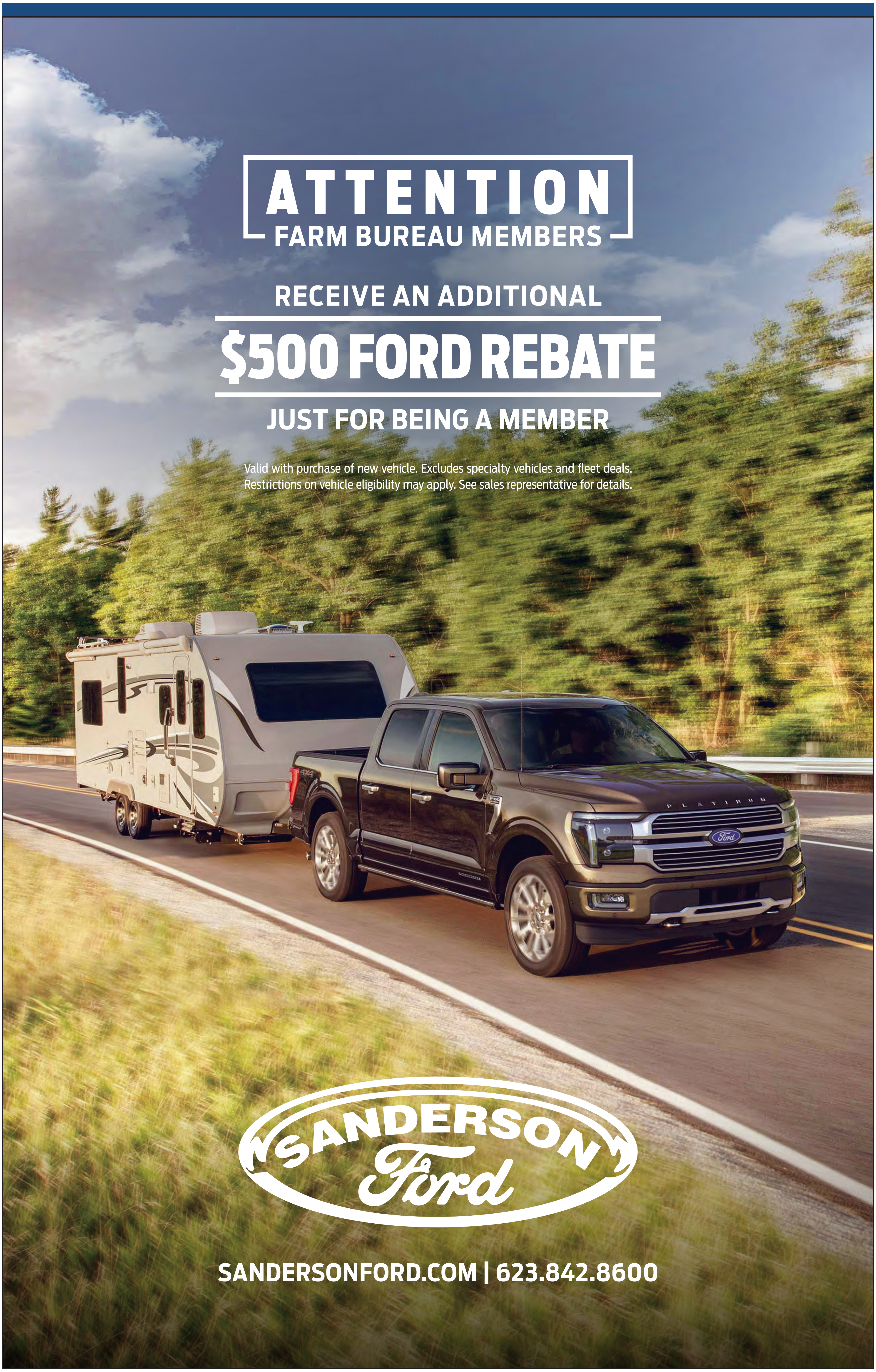
ARIZONA AGRICULTURE is published 9 months, plus two special editions annually, (ISSN 0274-7014) by the Arizona Farm Bureau Federation. Periodicals postage paid in Higley, Arizona and additional mailing offices.

POSTMASTER
Send address changes to:
Arizona Agriculture
325 S. Higley Rd., Ste. 210
Gilbert, Arizona 85296
Subscriptions are included in annual dues.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FARM BUREAU CALLS ON FARM AND RANCH WOMEN TO TAKE NATIONAL SURVEY

By Staff Reports

Women play a vital role in American agriculture—contributing through production, advocacy, education, and entrepreneurship, while also strengthening rural communities through leadership and outreach.

According to the most recent Census of Agriculture, women make up more than one-third of all U.S. farm operators and are increasingly leading in farm management, agribusiness, research, and advocacy.

The national **Women in Agriculture Study** will explore women's leadership and involvement across the industry, identify barriers and opportunities, and provide actionable insights to strengthen engagement and support systems. This study offers a unique opportunity to highlight the significant role women play in driving innovation, leadership, and engagement in agriculture both today and for generations to come.

The National Women in Agriculture Study welcomes perspectives from farmers, ranchers, agribusiness professionals, educators, advocates and others connected to agriculture, forestry, and the life sciences.

To take the approximately 15-minute survey go here: https://merceruniversity.co1.qualtrics.com/jfe/form/SV_8pQLTevoahZquQm

ADWR HOLDS MEETING TO DISCUSS POTENTIAL AMA IN RANEGRAS PLAIN

Information from Arizona Department of Water Resources

On October 15, 2025, the Arizona Department of Water Resources (ADWR) hosted an informational meeting in Brenda, Arizona engaging residents, farmers, and community members with data and regulatory framework for the basin's groundwater resources.

During the meeting, ADWR hydrologist Ryan Mitchell provided an overview of the basin's hydrology and ongoing monitoring. The Ranegras Plain Basin, located in La Paz County and covering just under 1,000 square miles, is a basin encircled by mountains with no perennial streams. The area relies almost entirely on groundwater stored within unconsolidated alluvial deposits.

ADWR'S HYDROLOGIC OVERVIEW

Annual precipitation averages 5.5 inches on the valley floor and 8.5 inches in higher elevations. Recharge primarily occurs through mountain-front runoff, estimated at 2,000 acre-feet per year. Additional inflows include 2,500 acre-feet from Central Arizona Project canal seepage and 300–500 acre-feet from adjacent basins, totaling roughly 4,500 acre-feet annually.

According to ADWR, outflows far exceed inflows. Agricultural and industrial pumping has averaged about 40,000 acre-feet per year since 2016, based on USGS crop-mapping data.

ADWR monitors groundwater through 19 active index wells, including one with real-time pressure transducers. More than 2,300 water-level measurements have been collected during basin sweeps in 1988, 1993, 1998, 2014, and 2016. Data from the Groundwater Site Inventory (GWSI) show significant declines:

- ***Northern wells:*** 30 to 75 feet over 73 over 78 years
- ***Central wells (near pumping centers):*** 136–242 feet over 40–42 years
- ***Southern wells:*** smaller changes

Contour maps from 1988–2017 indicate up to 200 feet of drawdown in central portions of the basin. Satellite interferometry further reveals land subsidence of up to 40 centimeters over 15 years, with rates accelerating from 1 cm/year in 1996 to 5 cm/year in recent years, signaling compaction of aquifer sediments.

MANAGEMENT FRAMEWORK

ADWR's Olga Hart outlined management options available under Arizona's 1980 Groundwater Management Act.

Statewide, all wells must be registered, and new subdivisions must demonstrate a 100-year water supply.

- ***Irrigation Non-Expansion Areas (INAs):*** Prohibit new irrigated acreage and require metering of non-exempt wells (pumping >35 gallons per minute).
- ***Active Management Areas (AMAs):*** Add further tools and restrictions including grandfathered water rights for existing users, well-impact analyses (limiting new wells to ≤10 feet of additional drawdown in 5 years), conservation programs, and an Assured Water Supply program ensuring new development aligns with management goals. All wells pumping over 35 gallons per minute (gpm), are required to place meters upon designation of an AMA.

Exempt wells, those pumping ≤35 gpm, using <10 acre-feet annually for non-irrigation purposes, and irrigating less than 2 acres, only require registration as with other wells throughout the state regardless of whether or not they are included within an AMA or INA.

Arizona currently manages seven AMAs (including recent designations in Douglas and Willcox) and three INAs. New designations can be initiated either by the ADWR Director, following hearings on groundwater conditions, similar to the Willcox process, or through local petitions or ballot measures.

COMMUNITY DISCUSSION AND CONCERNS

The question-and-answer session covered a broad range of topics.

- ***Management Process and Local Role:*** ADWR emphasized that local input is essential in shaping conservation programs and management goals.
- ***Agricultural Concerns:*** Farmers asked how water use would be measured under regulation. ADWR explained that current crop-based estimates would transition to metered or energy-use methods, with grandfathered rights based on the previous five years of irrigation history. These rights would secure existing water use, requiring a $75 application fee and an 18 to 24-month process after AMA establishment. Replacement wells would maintain prior use without expansion.
- ***Groundwater Availability:*** Estimated total storage ranges between 16 to 22 million acre-feet, though accessibility depends on depth and sediment composition, requiring modeling for more precise analysis.
- ***Industrial and High-Water-Use Projects:*** ADWR noted that one recent project had been denied due to excessive proposed pumping following community feedback.
- ***Exempt Wells and Shared Systems:*** Individual exempt wells require only registration, with no monitoring fees. Small shared systems typically qualify as exempt but require verification.
- ***Metering and Conservation:*** Meter data would guide water-duty assignments aligned with conservation goals, though Best Management Practices (BMPs) can only be enforced within an AMA.
- ***Water Exports:*** State law already prohibits direct groundwater transfers to urban areas such as Phoenix, regardless of AMA or INA status.

Community members also discussed the opportunity to tailor management goals within an AMA designation, such as creating flexibility in efficiency standards to account for different agricultural operations.

SUMMARY

ADWR highlighted both the significant groundwater declines in the Ranegras Plain Basin and the importance of local input in deciding whether additional management tools, like subsequent AMA, are warranted. As discussions continue, stakeholders will weigh how best to balance long-term water reliability with the basin's agricultural and economic needs.

VIRTUAL TOURS BRING THOUSANDS OF STUDENTS TO THE FARM

By Katie Aikins, Arizona Farm Bureau Director of Agriculture Education

What began as a simple idea to assist teachers when in 2020 COVID forced schools to go online has turned into a successful educational resource that connects students to the farm and their farmers. Without ever leaving the classroom, students across the state can tour Arizona farms and ranches and interact with the farmers and ranchers that are producing their food.

To date, Arizona Farm Bureau Ag in the Classroom (AZFB AITC) has 17 Virtual Tours that give students an up-close and personal look at pumpkins, pistachios, beef, pollen, goats, cactus, lettuce, cotton, berries, Arizona Game and Fish, Bayer Crop Science, bees, dairy, and more.

Over the years, the tours have been viewed 14,230 times. An impressive number, all on its own, increases the wow factor significantly when you consider that each of those views is often by a teacher showing it to a classroom full of students, bringing the potential reach to over 380,000 students! A feat that could not be accomplished with in-person, on-the-farm tours. The most popular video? Riverview's Coronado Dairy in Cochise County, followed by cotton, Bayer Crop Science in Marana, and pumpkins.

HOW THEY WORK

Although the Virtual Tours are live, due to connectivity issues, many of the components are filmed in advance. AITC staff visit the farms and ranches and collect videos and photos that are then compiled into an easy-to-follow tour.

On the day of the tour, our star farmer or rancher joins us via Zoom and talks to the students about what they are seeing. Students can ask their questions in real time and learn what farmers are doing right from the farmers themselves.

WHAT PLATFORM ARE THE TOURS ON?

The Virtual Tours run through the Zoom platform. This allows classes to join and exit as their schedule allows. Additionally, we can record the tour to upload to our media platforms for viewing at times that are convenient to teachers.

WHO CAN PARTICIPATE?

Although the Virtual Tours are designed for students, anyone can join live or view later. Arizona Farm Bureau has even used the tours for the NRCS CAMP program. The tours are designed to be an introduction to the farm and commodity, so they are entertaining and educational for individuals of any age.

WHERE CAN WE SEE PAST TOURS?

Individuals can visit us at AITC AZFB on YouTube to view all our past tours. Be sure to follow us at AZFB AITC on Facebook and Instagram for notifications for upcoming tours. You can also go to our web page to view them: https://www.azfb.org/Agriculture-in-the-Classroom

WHAT IS NEW?

This year 360-technology has been incorporated into several farm tours. Students can now visit farms and ranches across the state using VR 360 technology that allows them to step onto the farm without ever leaving the classroom! AITC visits classrooms grades 6 through 8 with viewing glasses and an interactive presentation about technology on farms.

Bummed you aren't in 6th-8th grade and cannot participate in the presentation? No worries, you can still move your way around the farms in a 360 Tour video on YouTube with a click of your mouse.

ECONOMICS OF CONSUMERS' FOOD SPEND

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the rhythm can be useful techniques to adapt.

***Arizona Agriculture:* With Arizona's strong agricultural sector, including significant production of vegetables, cotton, and livestock, how do the shifts away from traditional grocery store dominance (now at 54% of food-at-home spending) affect direct-to-consumer sales or farm-to-table initiatives in Arizona, and could you elaborate on any state-specific data from the USDA-ERS series?**

Munch: As Arizona families spread their at-home food dollars across warehouse clubs, discount chains, curbside pickup and delivery, the traditional "grocery store" no longer completely dominates the cart; in 2024 it accounted for about 54% of food-at-home spending nationally, down from earlier decades. That fragmentation doesn't eliminate direct-from-farmer sales, but it does keep them a small slice of the pie because shoppers now have so many other convenient outlets tugging at the same budget.

USDA-ERS's State Food Expenditure work helps put Arizona in context. Over the long run (1997–2023), Arizona sat right in the middle of the pack for growth in food-at-home purchases (about 16% per person after adjusting for inflation) suggesting steady, not runaway, gains in the "cook-at-home" side of the market. Meanwhile, ERS's latest state map shows Arizona in the mid-range for per-capita restaurant (away-from-home) spending, reflecting the influence of Phoenix and Tucson's metro dining scene alongside more traditional shopping patterns elsewhere in the state.

The net effect for Arizona farm-to-table and direct sales is that there's a stable base of households still stocking the pantry, but they're choosing among more outlets. That keeps DTC visible (farmers' markets, on-farm stands, subscription boxes) but competition for those same dollars is broader and more constant than it used to be.

***Arizona Agriculture:* The article notes higher away-from-home spending in tourism-heavy states like Nevada and Hawaii. Considering Arizona's tourism industry in places like Scottsdale, Sedona, near the Grand Canyon and other locations, how does this compare to national trends, and what role do food-service businesses play in Arizona's economy post-2024?**

Munch: Arizona sits near the middle for restaurant spending when you look at the whole state. The real pull comes from tourism corridors where demand is steady and then jumps with spring training, winter visitors, and park season.

Scottsdale, Phoenix, Sedona, Flagstaff, and the Grand Canyon area support dense clusters of hotels, resorts, and quick-serve kitchens that buy a lot of beef, dairy, produce, and specialty items. As tourism grows in these areas, food-service demand deepens and becomes more predictable, which supports a stable market for Arizona-grown products. So even if the statewide map looks average, local tourism growth keeps food-service a reliable outlet for Arizona agriculture.

***Arizona Agriculture:* Inflation and rising grocery costs are mentioned as narrowing the price gap between eating at home and away from home. In Arizona, where food prices can vary due to region and grocery store and restaurant availability, how might these national trends exacerbate or mitigate pressures on household budgets?**

Munch: In the Phoenix area, over the 12 months ending August 2025, Food-at-Home prices rose 1.5% while Food-Away-from-Home rose 0.9% — both moderate, with FAFH slightly cooler than groceries in the latest reading. That dynamic softens, but doesn't erase, the budget incentive to cook at home.

Households will keep stretching their dollars at clubs and discount chains for staples, but they will still leave room for some meals out, which keeps volumes mixed yet generally steady across grocery and restaurants. Convenience is the swing factor. When time is short, many families accept a slightly higher price for a quick meal instead of spending longer to cook cheaper ingredients at home.

***Arizona Agriculture:* We've also been told that Arizona has one of the most competitive grocery store environments that can make food prices quite competitive for consumers. In this environment, how can Arizona agriculture respond?**

Munch: Arizona agriculture can answer a crowded grocery field by acting bigger together. Align growers, shippers, packers, and processors around fast, dependable supply from field to urban areas. A shared push on cold chain capacity, standardized packs and labels, and consistent quality gives retailers one simple Arizona offer.

Sector groups can run statewide promotions tied to Arizona seasons and tourism so retailers and delivery apps feature local items at the right time. Building more in-state packing and light processing keeps value here and shortens the trip to the shelf. Data sharing with major chains and delivery platforms helps match harvest to demand so prices hold and shrink stays low.

Farm Bureaus, commodity groups, and the state can back this with food safety training, water and transportation reliability, and small grants for refrigeration and aggregation so smaller growers can participate. Working as one system can help Arizona products stay on shelf year-round at a fair price even when national chains lean on out-of-state supply.

***Arizona Agriculture:* The pandemic's impact showed a temporary rebound in grocery spending, but long-term growth favors away-from-home options at 7 to 9% annually, as you point out in your article. For Arizona's ranchers and producers, particularly in beef and dairy, what strategies do you recommend adapting to this shift, and are there any emerging innovations in the food supply chain that align with digital ordering and delivery growth?**

Munch: Long run growth is in meals away from home. For beef and dairy that means meeting restaurant and delivery kitchens where they operate. They need consistent portions, predictable cook times, and packaging that holds quality in transit. For example, offer fixed-weight steaks, pre-trimmed taco and fajita cuts, ground beef blends that stay juicy in clamshell packaging, and dairy items that travel well like single-serve milks, drinkable yogurts, and shredded or diced cheeses for pizza and tacos.

On the innovation side, work directly with chains and ghost kitchens (commercial kitchens that cook food only for delivery or pickup) to plan seasonal menus that highlight Arizona products during spring training and the winter visitor season. Adding a simple digital traceability with a QR code on cases or menus can put the farmer and sourcing story one tap away. Keep a small amount of refrigerated product at a cooler in town and run regular city routes so orders reach kitchens on time and in good shape. The aim is dependable specs, short distances, and a clear Arizona story that matches how people now order food.

***Arizona Agriculture:* Regional data shows urban states like California with high away-from-home spending. How does Arizona's blend of urban sprawl in Maricopa and Pima counties and more traditional home-cooking cultures in southern Arizona fit into the broader hypotheses about cultural preferences, and what does the latest 2025 data suggest for the state?**

Munch: Our hypothesis holds: dense, commuter-heavy metros lean FAFH; rural counties lean FAH. Ongoing growth in the Valley reinforces that tilt.

The U.S. Census reports Maricopa County reached 4,673,096 residents in 2024, remaining one of only 50 million-plus counties nationwide; more people + longer commutes = more convenience purchases and restaurant demand. Southern and rural Arizona tilt toward cooking at home because there are fewer nearby restaurants and delivery choices and shopping is more planned. The 2025 picture so far points to the same mix for the state overall, with away-from-home stronger in the big counties and at-home holding steady elsewhere.

***Arizona Agriculture:* The article concludes that convenience is king, with Americans spending only 10.6% of disposable income on food. In Arizona, where economic growth in tech and real estate is booming, how might this low food expenditure share influence competitiveness for local food processors and retailers?**

Munch: A low share of income spent on food gives Arizona households room to pay for convenience and quality, so competition shifts from only price to speed, availability, and brand trust. In fast-growing tech and real-estate corridors, time-scarce families lean toward ready-to-eat and pickup/delivery, which rewards processors and retailers who keep product in stock, consistent, and easy to find both in-store and in apps. Clubs and discount formats still pull on staple items, so the market splits between value packs and "trade-up" premium choices. Local processors that pair dependable supply with a clear Arizona identity are best positioned to keep share.

***Arizona Agriculture:* Direct purchases from farmers have remained a small share (0.8-1.4%) nationally. Given Arizona's prominence in specialty crops like citrus, leafy greens, pistachios, pecans, as well as farmers' markets throughout Arizona, how can Arizona direct market producers expand this segment amid the rise of warehouse clubs and supercenters?**

Munch: Direct sales grow when buying is easy, predictable, and visible. Offer simple right sized packs, keep pickup spots and hours consistent, and take online pre-orders with quick pickup or limited delivery so buying from a farm feels as easy as a club run.

Accepting SNAP EBT and Double Up where available can widen the customer base (if practical to offer). Lean into Arizona's harvest calendar with short seasonal offers like citrus medleys or Pecan gift boxes and promote them a week ahead. Keep prices clear, the story local, and quality steady so first-time buyers become repeat customers.

***Arizona Agriculture:* Through Arizona Farm Bureau's Fill Your Plate (www.fillyourplate.org) website we attempt to help Arizona families discover our direct market, or retail, farming and ranching. With the trends you've investigated, do websites like this bode well with the changing food supply chain? What else should we be doing?**

Munch: Absolutely. Fill Your Plate fits how people find food now because most discovery starts on the internet. Keeping it simple and useful is a must. Some website recommendations I think are helpful are: making every listing complete with photos, hours, prices, pickup spots, and a clear "order" button that links to the farm; showing what's in season this week and which farms accept SNAP; adding a map view with quick filters so families can find citrus, pecans, beef, or dairy near home; letting shoppers sign up for text or email alerts when a farm posts fresh product; encouraging farms to update inventory often so trust stays high; and sharing short stories and recipes from Arizona families to turn clicks into first purchases and first purchases into regular customers.

***Arizona Agriculture:* Looking ahead from the 2024 data, how do you foresee evolving trends like automation in meal delivery affecting food service and agriculture, particularly in border regions like Nogales where cross-border trade influences supply chains?**

Munch: Two forces converge here. First, delivery platforms and grocers are automating upstream (robotic picking, micro-fulfillment, dynamic routing), which compresses order-to-door times and favors suppliers who can hit consistent specs and tight receiving windows. Second, Nogales remains a powerhouse port for fresh produce, long representing about 37% of U.S. fresh produce imports from Mexico by value, underscoring the scale of cross-border flows that anchor Arizona's cool-chain ecosystem.

Expect continued investment in cold storage, quality assurance, and fast customs clearance. For Arizona growers, the play is complementarity. Leaning into early/late windows, varietals and pack styles that pair well with cross-border volume so restaurants and delivery kitchens can plan stable menus with a heavier "Arizona" story.

THIRD QUARTER 2025 REGULATORY COMMENT REVIEW

By Ana Otto, Arizona Farm Bureau Government Relations Manager

As the third quarter of 2025 wraps up, our engagement with regulatory proposals has remained steady and proactive. This quarter includes several comment letters addressing key state-level issues. Below is a summary of the regulatory dockets that Arizona Farm Bureau responded to during the third quarter of 2025.

Department of the Interior (DOI) – Regulatory Reform Request for Information - AZFB submitted comments to the DOI in response to its request for information on regulatory reform. Our comments identified several priority areas for improvement, including Bureau of Land Management (BLM) grazing regulations, notice-to-proceed requirements, the Conservation and Landscape Health Rule, utility-scale solar energy development, national monument designations, and the management of wild horse and burro herds. We also addressed issues involving the Bureau of Indian Affairs and livestock fencing, as well as Fish and Wildlife Service regulations related to Section 10(j) and the Mexican gray wolf.

Department of the Interior (DOI) – Revisions to National Environmental Policy Act (NEPA) Implementing Regulations – AZFB's comments support DOI's efforts to revise its NEPA regulations to align with recent actions by the Council on Environmental Quality (CEQ), Congress, and the Supreme Court, promoting greater consistency, efficiency, and clarity in environmental reviews. The comments recognized that CEQ's rescission of prior regulations and the Fiscal Responsibility Act of 2023 necessitate these updates. Also stated was support for DOI's addition of section 46.205(g), which allows bureaus to rely on categorical exclusions (CEs) established under NEPA Section 109, and encourages DOI and its bureaus, including BLM, to identify additional low-impact activities, such as maintaining existing infrastructure, that could qualify for CEs.

United States Department of Agriculture (USDA) – Modifications to National Environmental Policy Act Implementing Regulations - AZFB's comments noted support for the USDA's efforts to modernize its NEPA regulations in line with current statutory and judicial guidance and encouraged continued engagement with stakeholders to ensure the revisions improve clarity, consistency, and efficiency while supporting responsible resource management. We also noted support for the USDA's efforts to clarify CE procedures, allowing the use of exclusions developed by other agencies, and urged continued collaboration to identify additional low-impact activities that could qualify.

United States Department of Agriculture (USDA) – Reorganization Plan – AZFB's comments aligned with those prepared b y the American Farm Bureau Federation, which overall support the agency's efforts to improve services for farmers and ranchers and rural communities, but also noted that any reorganization plan to be implemented in such a way as to minimize disruptions in services and programs. The comments also emphasized the importance of keeping USDA decision-makers in Washington, D.C., to focus on national agricultural priorities, while recognizing that placing certain USDA employees closer to their customers can enhance service and engagement. The agency was also urged to carefully consider workload, local input, and interagency coordination in any potential reorganization.

Department of Labor (DOL) – Recission of Final Rule; Improving Protections for Workers in Temp. Ag Employment in the U.S. - AZFB's comments supported DOL's proposal to rescind this final rule and reiterated our earlier concerns with its original proposal. We noted that the finalized rule made the already complex and costly H-2A program even more burdensome, without meaningfully improving worker protections. The final rule also added several new requirements that increased compliance challenges for employers, restricted their ability to manage their workforce effectively, and raised concerns regarding liability, privacy, and property rights.

Environmental Protection Agency (EPA) – Registration for Over-the-Top Dicamba on Cotton and Soybeans – AZFB's comments supported the registration of dicamba for use on cotton but also expressed concerns about certain proposed restrictions that could significantly limit its use. Specifically, AZFB noted that the proposed application cut-off temperature was not practical for Arizona's desert growing conditions, and that the designated weather stations used to determine compliance are often located outside agricultural areas.

Department of Justice (DOJ) – State Laws Having Significant Adverse Effects on the National Economy or Significant Adverse Effects on Interstate Commerce – AZFB's comments urged the DOJ to pay close attention to laws that create a patchwork of regulations, as these can disrupt interstate commerce and increase costs for both producers and consumers. In our submission, we highlighted a specific state agency regulation that exemplifies this problem and reveals negative effects on producers, consumers, and commerce.

United States Department of Agriculture, Forest Service (FS) – Special Areas; Roadless Area Conservation - AZFB's comments supported the Forest Service's plan to prepare an Environmental Impact Statement and rulemaking for managing inventoried roadless areas within the National Forest System. The comments also emphasized the importance of restoring local decision-making to empower those closest to the resources to address site-specific needs while maintaining access for wildfire suppression, pest control, and other essential activities. Also highlighted was the need for active forest management practices, such as sustainable timber production, fuel reduction, and targeted livestock grazing, to promote forest health and uphold multiple-use management principles.

For more information about a specific comment letter, contact Ana Kennedy Otto at advocacy@azfb.org.

YOUR MEMBERSHIP DOLLARS AT WORK

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Cal.)

Our lawsuit continues against California over its new law requiring large companies to report the greenhouse gas (GHG) emissions of their supply chain (so-called scope 3 emissions). The district court denied our motion for a preliminary injunction, which sought to stop the rule while the case is heard. We appealed that denial to the Ninth Circuit, filed our opening brief, and asked the appellate court to preliminarily stop the rule while the appeal is heard.

Scope 3 data gathering and recordkeeping laws threaten American agriculture, as the reporting companies will inevitably push the costs onto their supply chain. Similarly, reporting companies will favor larger suppliers that can more easily provide the information to the detriment of smaller operations, leading to increased consolidation and integration.

AFBF is challenging the law with the Western Growers Association, U.S. Chamber of Commerce, and other business groups.

H-2A Worker Protection Rule – International Fresh Produce Ass'n v. Dep't of Labor (S.D. Miss.)

Following our success in blocking key elements of the Department of Labor's (DOL) H-2A Worker Protection Rule nationwide, DOL proposed rescinding the rule. The court has now stayed and administratively closed the case while the government formally rescinds the rule.

AFBF was joined by the Mississippi Farm Bureau Federation, International Fresh Produce Association, U.S. Chamber of Commerce, the State of Mississippi, and several other agricultural associations.

Lake Erie TMDL – Board of Lucas County Commissioners v. U.S. Environmental Protection Agency (N.D. Ohio)

The court denied our motion to intervene in the case, finding that the EPA could adequately represent our interests. We are appealing the denial to the Sixth Circuit Court of Appeals.

AFBF, the Ohio Farm Bureau, and an agricultural coalition are seeking to support the U.S. EPA's approval of Ohio EPA's Maumee Watershed Nutrient TMDL. The TMDL establishes the maximum amount of total phosphorus that the Maumee Watershed – and ultimately, the western Lake Erie basin – can receive and still meet applicable water quality standards. An ENGO is targeting the ag stormwater exemption and seeking to have tile drainage be considered a point source.

ESA Rule Litigation – American Farm Bureau Federation v. U.S. Fish and Wildlife Service (D.D.C.); Center for Biological Diversity v. U.S. Dep't of the Interior (N.D. Cal.)

AFBF and a coalition of industry trade groups filed an amicus brief in the Northern District of California opposing the environmental groups' challenge to the U.S. Fish and Wildlife Service and National Marine Fisheries Service (the Services) 2024 Endangered Species Act (ESA) rules. The environmental groups allege that those rules are not stringent enough, while our case in the District of Columbia argues that they go too far. Generally, the 2024 ESA rules largely rescind and replace the 2019 ESA rules from the first Trump Administration. Notably, AFBF successfully defended the 2019 ESA rules in previous litigation.

The 2024 ESA rules not only revert to some of the unlawful provisions that the 2019 ESA rules had fixed, but also push even further beyond the ESA's intended reach than the pre-219 rules. The result is a series of regulations that far exceed what the ESA authorizes and that will harm farmers without meaningfully advancing the ESA's species recovery goals.

Citizen Suits – ExxonMobil v. Environment Texas Citizen Lobby (Supreme Court)

The Supreme Court declined to hear a case seeking to tighten the rules for who can bring environmental citizen suits (in legal terms, "standing"). AFBF and a coalition of industry trade groups filed an amicus brief asking the Court to hear the case.

Clean Water Act – Port of Tacoma v. Puget Soundkeeper Alliance (Supreme Court)

The Supreme Court declined to hear a case concerning whether citizen suits brought under section 505 of the Clean Water Act may be used to enforce state-law conditions that are incorporated into a state-issued NPDES permit. AFBF and a coalition of industry trade groups filed an amicus brief asking the Court to hear the case.

Pauses in Regulatory Challenges

Many of our cases are paused as the new administration reevaluates the rules underlying our lawsuits. These include challenges to the 2023 WOTUS Rule, BLM's Conservation Rule, EPA's light-duty and medium-duty tailpipe emissions rule, EPA's heavy-duty tailpipe emissions rule, NHTSA's CAFE standards, EPA's CERCLA designation for PFAS, and EPA's Tribal Treaty Rights Rule

While legal work often comes at a significant cost, effective legal advocacy remains essential to protecting American agriculture. Each case helps shape the legal landscape, establishing precedents that influence future regulatory and policy decisions, an investment we cannot afford to overlook.

MENTOR PROTÉGÉ CAMP CLASS 4, PROTÉGÉ PROFILES

By Staff Reports

The CAMP mentor/protégé 2025 series for Class 4 features two proteges from earlier in the year, NRCS team members Mynesha Holliday and Heather Spieth.

The Conservation Agricultural Mentoring Program (CAMP) in Arizona, in partnership with the Arizona Farm Bureau, has now been at it for four years. This program, unique in its regard, has a double dose of uniqueness as the Arizona NRCS team approached the Farm Bureau to partner with them in the effort to help mentor NRCS employees for a boots on-the-ground experience on Arizona agriculture.

Class 4 mentors and proteges worked to understand Arizona agriculture and conservation opportunities, joining forces to provide firsthand experience of the conservation practices and agricultural happenings.

Below are Holliday and Spieth thoughts on the program. Their mentor, Michala McGibbon, helped them understand production agriculture in Arizona, specifically ranching.

United States Department of Agriculture NRCS Natural Resources Conservation Service

MYNESHA HOLLIDAY: CLASS 4 PROTEGE

What's been the biggest takeaway from your first gathering? My biggest take away was observing their operation. It was fascinating viewing their digital equipment for the cattle. Also, it was neat to see their watering system.

Why have you felt this program has been helpful? This program has been helpful because it broadens my experience and helps build my character and commination skills with the producers. It helps me look at the bigger picture of farmers and ranchers besides food production. I was not raised on a ranch, but I grew up around small-scale farming. It is a humbling experience to see mass production farmers/ranchers. I love to see their faces as they discuss what's passionate to them. It's not just farming for them. It's their life, and hard work. Anything worth having requires sacrifice.

HEATHER SPIETH: CLASS 4 PROTEGE

What's been the biggest takeaway from your first gathering? The biggest takeaway from our first meeting together was seeing some of the watering projects they have implemented and looking at how healthy their herd is. We also talked about their management practices and what NRCS can do to help build stronger relationships with other farmers and ranchers within the community.

Why have you felt this program has been helpful? I feel this program has been helpful as we have made really good conversation on the challenges they have faced as ranchers and how they have overcome those efforts. It has been helpful seeing how involved they are in multiple conservation districts and programs, having a voice for the ranching community. This links the NRCS employees to those conservation meetings to listen to and connect with the ranching community to help make a larger impact on addressing their resource concerns they may be experiencing. Also, listening to their story and being paired up with a successful ranch mom, is motivational and leads to great conversation as my husband and I are working on a ranch and we just acquired our own lease and being a mother to 2 younger children, it is nice to sit down and see how they push through and do it all.

United States Postal Service
Statement of Ownership, Management, and Circulation

1. Publication Title: Arizona Agriculture
2. Publication Number: 1557-1831
3. Filing Date: 09-22-2025
4. Issue Frequency: Monthly
5. Number of Issues Published Annually: 11
6. Annual Subscription Price: $50.00
7. Complete Mailing Address of Known Office of Publication: Arizona Farm Bureau Federation 325 S. Higley Rd, Suite 210, Gilbert, Arizona, 85296
8. Complete Mailing Address of Headquarters or General Business Office of Publisher: Arizona Farm Bureau Federation Arizona Agriculture 325 S Higley Rd, Suite 210, Gilbert, Arizona, 85296
9. Full Names and Complete Mailing Addresses of Publisher, Editor, and Managing Editor
   Publisher: Philip Bashaw 325 S Higley Rd, Suite 210, Gilbert, Arizona, 85296
   Editor: Julie Murphree 325 S Higley Rd, Suite 210, Gilbert, Arizona, 85296
   Managing Editor Julie Murphree 325 S Higley Rd, Suite 210, Gilbert, Arizona, 85296
10. Owner: Arizona Farm Bureau Federation 325 S Higley Rd, Suite 210, Gilbert, Arizona, 85296
11. Known Bondholders, Mortgagees, and Other Security Holders Owning or Holding 1 Percent or More of Total Amount of Bonds, Mortgages, or Other Securities: None
12. Tax Status: The purpose, function, and nonprofit status of this organization and the exempt status for federal income tax purposes has not changed during the preceding 12 months
13. Publication Title: Arizona Agriculture
14. Issue Date for Circulation Data: 09/29/2025
15. Extent and Nature of Circulation: Agriculture industry news
   a. Total Number of Copies (Net press run): Average No. Copies Each Issue During Preceding 12 Months — 9,451 No. Copies of Single Issue Published Nearest to Filing Date —2,871.
   b. Paid and/or Requested Circulation:
      i. Paid/Requested Outside-County Mail Subscriptions Stated on Form 3541. (Include advertiser's proof and exchange copies): Average No. Copies Each Issue During Preceding 12 Months — 5,894; No. Copies of Single Issue Published Nearest to Filing Date —1,948.
      ii. Paid In-County Subscriptions Stated on Form 3541 (Include advertiser's proof and exchange copies): Average No. Copies Each Issue During Preceding 12 Months — 3,557; No. Copies of Single Issue Published Nearest to Filing Date — 923.
      iii. Sales Through Dealers and Carriers, Street Vendors, Counter Sales, and Other Non-USPS Paid Distribution: Average No. Copies Each Issue During Preceding 12 Months — 0; No. Copies of Single Issue Published Nearest to Filing Date — 0.
      iv. Other Classes Mailed Through the USPS: Average No. Copies Each Issue During Preceding 12 Months — 0; No. Copies of Single Issue Published Nearest to Filing Date — 0.
   c. Total Paid and/or Requested Circulation [Sum of 15b. (1), (2), (3) and (4)]: Average No. Copies Each Issue During Preceding 12 Months — 9,451; No. Copies of Single Issue Published Nearest to Filing Date —2,871.
   d. Free Distribution by Mail (Samples, complimentary, and other free)
      i. Outside-County as stated on Form 3541: Average No. Copies Each Issue During Preceding 12 Months — 0; No. Copies of Single Issue Published Nearest to Filing Date — 0.
      ii. In-County as Stated on Form 3541: Average No. Copies Each Issue During Preceding 12 Months — 0: No. Copies of Single Issue Published Nearest to Filing Date — 0.
      iii. Free or Nominal rate copies mailed at Other Classes through the USPS: Average No. Copies Each Issue During Preceding 12 Months — 0: No. Copies of Single Issue Published Nearest to Filing Date — 0.
      iv. Free or Nominal rate distribution outside the mail: Average No. Copies Each Issue During Preceding 12 months - 0: Copies of Single Issue Published Nearest to Filing Date — 0.
   e. Total Free or Nominal Rate Distribution: Average No. Copies Each Issue During Preceding 12 Months — 50: No. Copies of Single Issue Published Nearest to Filing Date — 50.
   f. Total Distribution (Sum of 15c and 15e): Average No. Copies Each Issue During Preceding 12 Months — 9,451: No. Copies of Single Issue Published Nearest to Filing Date — 2,871.
   g. Copies not distributed: Average No. Copies Each Issue During Preceding 12 Months — 0: No. Copies of Single Issue Published Nearest to Filing Date — 0.
   h. Total (Sum of 15f and g.): Average No. Copies Each Issue During Preceding 12 Months —9,451: No. Copies of Single Issue Published Nearest to Filing Date — 2,871
   i. Percent Paid and/or Requested Circulation (15c. divided by 15f. times 100): Average No. Copies Each Issue During Preceding 12 Months — 100%: No. Copies of Single Issue Published Nearest to Filing Date — 100%.
16. Publication of Statement of Ownership: Publication Required. Will be printed in the Nov 04, 2025, issue of this publication.
17. Signature and Title of Editor, Publisher, Business Manager, or Owner: Date September 22, 2025

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