

The Florida Senate
COMMITTEE MEETING EXPANDED AGENDA

AGRICULTURE
Senator Collins, Chair
Senator Boyd, Vice Chair

MEETING DATE: Tuesday, November 7, 2023
TIME: 1:30—3:15 p.m.
PLACE: 301 Senate Building

MEMBERS: Senator Collins, Chair; Senator Boyd, Vice Chair; Senators Baxley, Berman, Rouson, and Simon

TAB	BILL NO. and INTRODUCER	BILL DESCRIPTION and SENATE COMMITTEE ACTIONS	COMMITTEE ACTION
1	Commissioner Wilton Simpson, Florida Department of Agriculture and Consumer Services		Presented
2	Mike Joyner, President, Florida Fruit and Vegetable Association		Presented
3	Presentation by Brightmark and Larson Dairy Farms on Renewable Natural Gas Project		Presented
Other Related Meeting Documents			

The Florida Senate

APPEARANCE RECORD

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Bill Number or Topic

Amendment Barcode (if applicable)

Meeting Date

Committee

Name

Phone

Address

Email

Street

City

State

Zip

Speaking:

☐

For

☐

Against



Information

OR

Waive Speaking:

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In Support

☐

Against

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S-001 (08/10/2021)



Impacts of Unfair Trade on Florida F&V Growers

November 7, 2023

Mike Joyner, Florida Fruit & Vegetable Association



Florida Fruits & Vegetables

- First in the nation in value of production – bell peppers, oranges, squash, snap beans, cucumbers, sugarcane, fresh market tomatoes and watermelons
- Second in nation in value of production – avocados, cabbage, tangerines and strawberries
- Third in nation in value of production – grapefruit and sweet corn
- Essential in feeding America fresh, healthy produce from November – late spring

Source: UF/IFAS Florida's Agriculture and Food Systems Fast Facts 2022



Impacts of the North American Free Trade Agreement (NAFTA)



Impacts

- **1993** – NAFTA signed into law. Took effect Jan. 1, 1994.
- **1999** – Five years after signing NAFTA, Florida specialty crop production value was 44% higher than the value of specialty crop imports from Mexico.
- **2014** – Ten years after signing NAFTA, the value of specialty crop imports from Mexico was 198% higher than the value of production for Florida specialty crops.
- **2001 - 2021** – 596% increase in value of Mexican Seasonal & Perishable imports (\$2.5 - \$17.58Bn)
- **46%** – Average growth per year over the last 5 years (\$12.05 -17.58Bn).

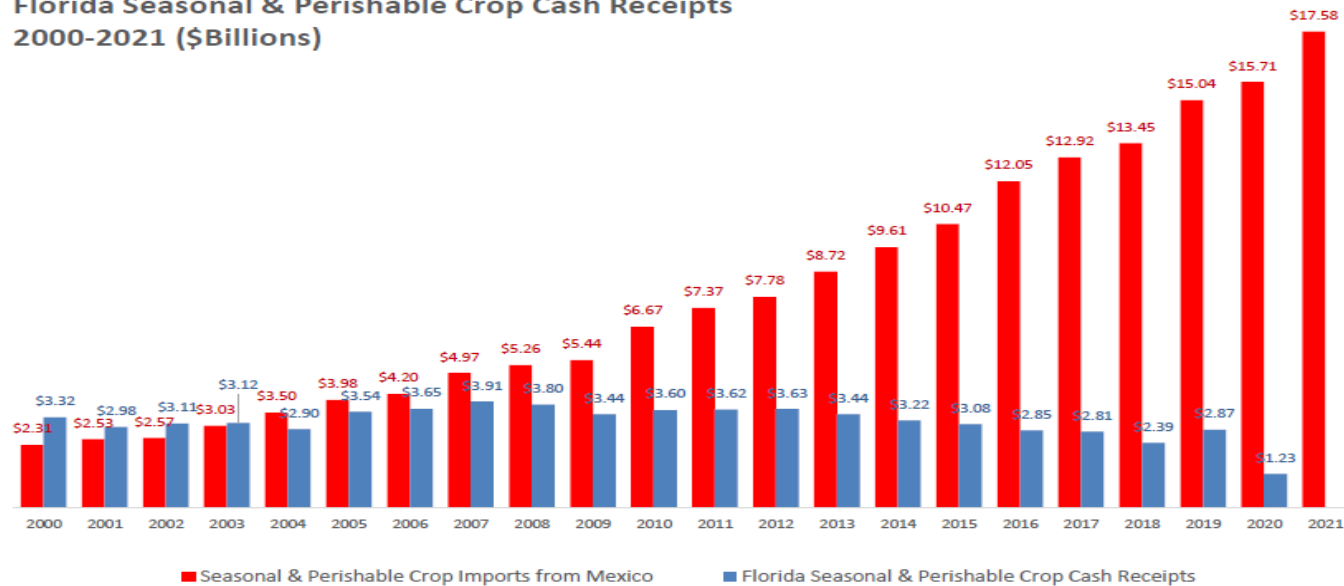
Source: Florida Department of Agriculture and Consumer Services – *Mexico's Ag-Export Impacts on Florida Agriculture* 8/1/22



Impacts of NAFTA



Seasonal & Perishable Crop Imports from Mexico and
Florida Seasonal & Perishable Crop Cash Receipts
2000-2021 (\$Billions)



Source: Florida Department of Agriculture and Consumer Services

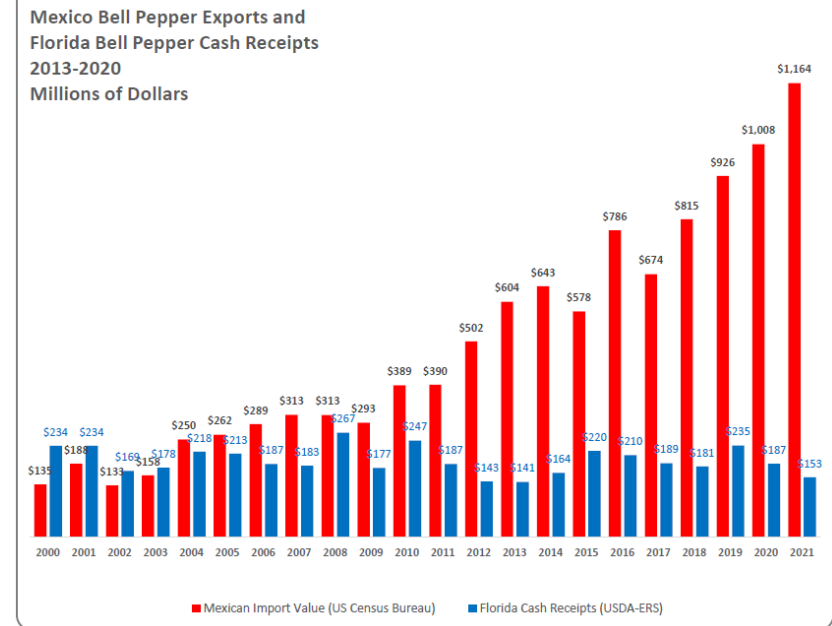


Impacts of NAFTA – Bell Peppers



- 520% – Expansion of the value of Mexican product from 2001 to 2021
- \$895Mn – Mexican average value exported from 2019-2021
- 73.47% – Loss of Florida Market Share in the U.S. between 2001 and 2021
- \$189Mn – Florida average production value from 2017-2021

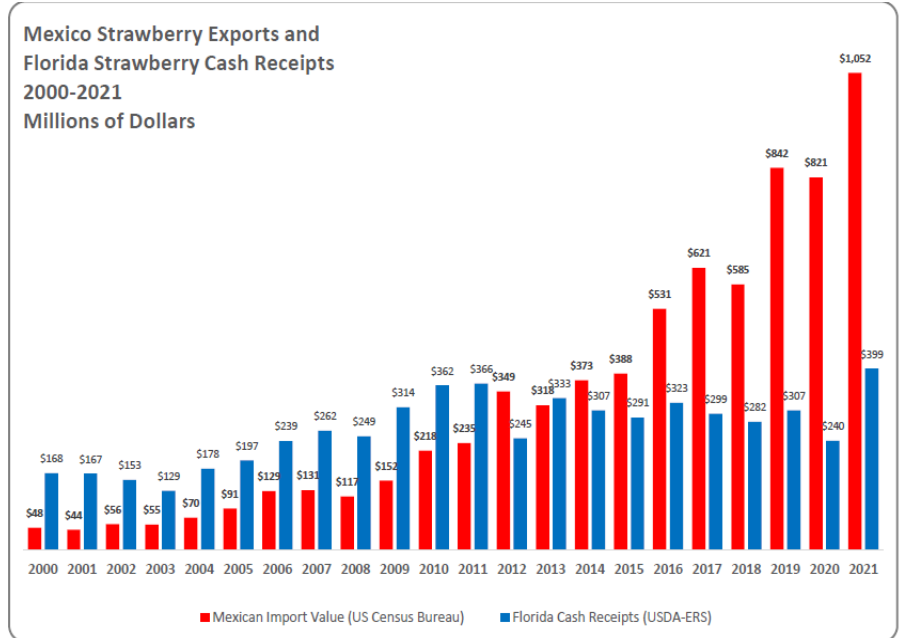
Source: Florida Department of Agriculture and Consumer Services



Impacts of NAFTA – Strawberries



- 2,308% – Expansion of the value of Mexican product from 2001 to 2021
- \$741 million – Mexican average value exported from 2016-2021
- 31.65% – Loss of Florida Market Share in the U.S. between 2001 and 2021
- \$308 million – Florida average production value from 2016-2021

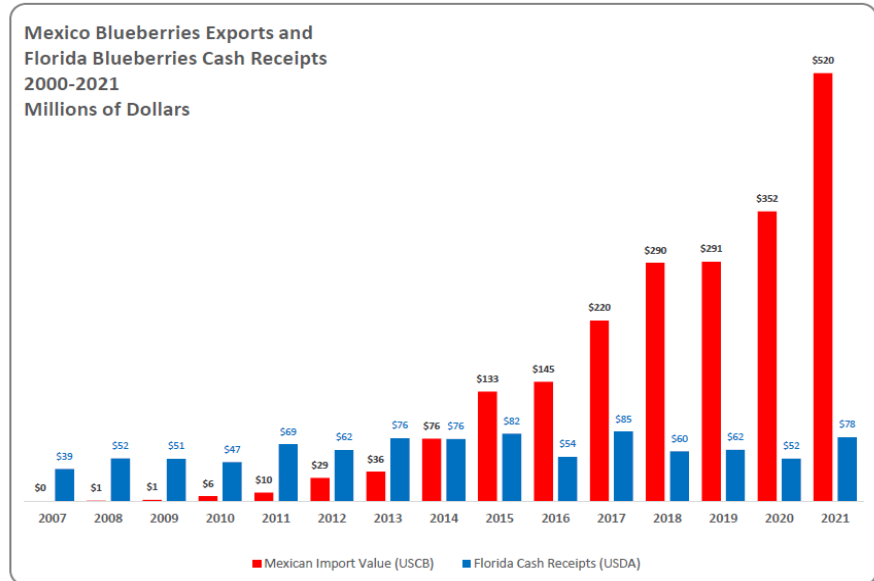


Source: Florida Department of Agriculture and Consumer Services



Impacts of NAFTA – Blueberries

- 583% – Expansion of the value of Mexican product from 2014 to 2021
- \$253 million – Mexican average value exported from 2014-2021
- 67.97% – Loss of Florida Market Share in the U.S. between 2011 and 2021
- \$68.5 million – Florida average production value from 2014-2021

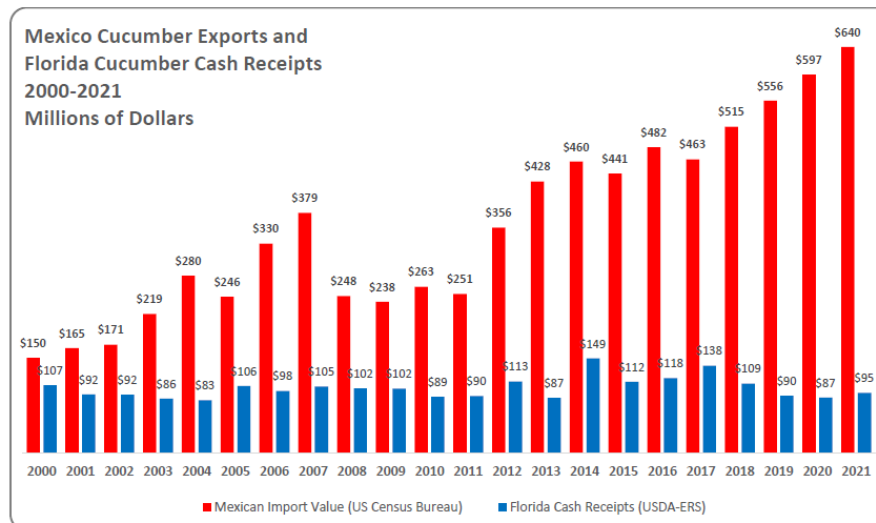


Source: Florida Department of Agriculture and Consumer Services



Impacts of NAFTA – Cucumbers

- 287% – Expansion of the value of Mexican product from 2001 to 2021
- \$542 million – Mexican average value exported from 2016-2021
- 71.94% – Loss of Florida Market Share in the U.S. between 2001 and 2021
- \$106.2 million – Florida average production value from 2016-2021

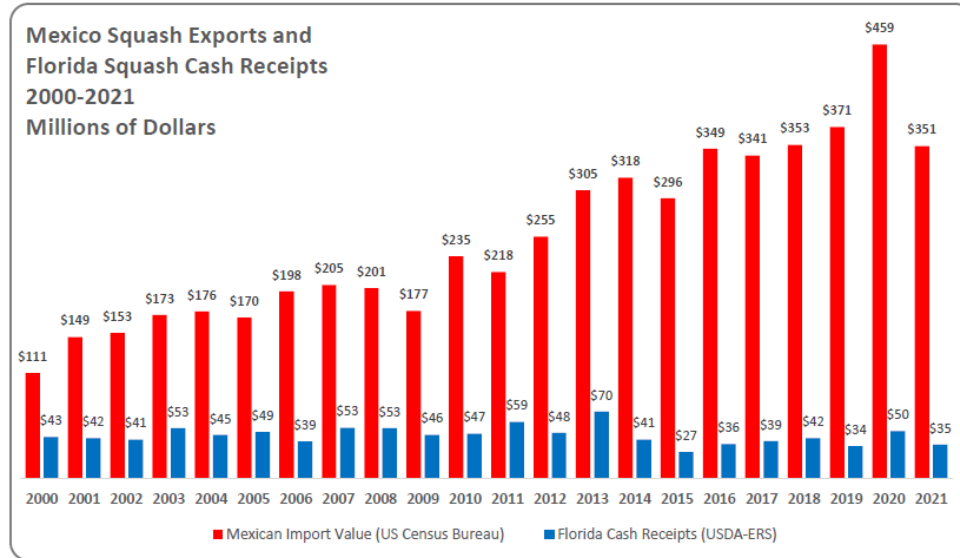


Source: Florida Department of Agriculture and Consumer Services



Impacts of NAFTA – Squash

- 135% – Expansion of the value of Mexican product from 2001 to 2021
- \$371 million – Mexican average value exported from 2016-2021
- 59.33% – Loss of Florida Market Share in the U.S. between 2001 and 2021
- \$39.2 million – Florida average production value from 2016-2021



Source: Florida Department of Agriculture and Consumer Services



How did we get here?

Mexico's Unfair Trade Practices

- Significant government subsidies for infrastructure, equipment, genetics, irrigation technology and more.

“As of 2018, there were about 126,000 acres of protected agriculture in that country. That’s a big jump from the 325 acres planted in 2003.”

Source: The Packer, Tom Burfield, September 17, 2019

- Prices well below the cost of production
- Low labor wages



Status of Seasonality Discussions

- U.S. – Mexico – Canada Agreement (USMCA)
- Antidumping and Countervailing Duties (AD/CVD)
- Defending Domestic Production Act (DDPA)
- Florida's Congressional Delegation
- Section 301 – US Trade Representative (USTR) can 1) impose restrictions 2) withdraw or suspend an agreement 3) enter into a binding agreement
- Seasonal and Perishable Agricultural Products Advisory Committee – US Trade Representative/US Department of Agriculture
- Florida Legislature



Conclusion



- Florida's fresh produce industry is in deep crisis.
- Soaring volumes of unfairly priced produce imported from foreign countries continue to devastate our growers, and others across the country.
- *Immediate, effective and enforceable* solutions are needed now to restore market fairness for U.S. producers of fresh fruits and vegetables.



11/7/2023

Meeting Date

Agriculture

Committee

Name Mike Joyner

Address 800 Trafalgar Court

Street

Maitland

City

FL

State

32751

Zip

The Florida Senate
APPEARANCE RECORD

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Trade

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Phone 8502103083

Email Mike.Joyner@FFVA.com

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S-001 (08/10/2021)

Brightmark

Putting Waste to Work.



BRIGHTMARK
REIMAGINE WASTE

BRIGHTMARK.COM
[@brightmark](https://twitter.com/brightmark)

An aerial photograph of a dense evergreen forest, likely a spruce or fir forest, with a thick canopy of green trees. The text is centered over the middle of the image.

We're on a mission to
Reimagine Waste.

Renewable natural gas (RNG)

“Approximately 60% of total global methane emissions come from anthropogenic sources. Of these, about 40% come from agriculture, including manure management.

-UN ENVIRONMENT PROGRAMME

Source: UN Environment Programme, "Global methane assessment: Benefits and costs of mitigating methane emissions, " 2021. Pg. 28



RNG production Process overview



1. DIVERT

Manure waste is collected on farms, food processing facilities, and delivered from waste management companies.



2. DIGEST

The waste is deposited into a digester that extracts and captures methane gas from within.



3. DISTRIBUTE

We separate, clean, and compress the methane into renewable natural gas that is used as transportation fuel or by local residents for heating and power.

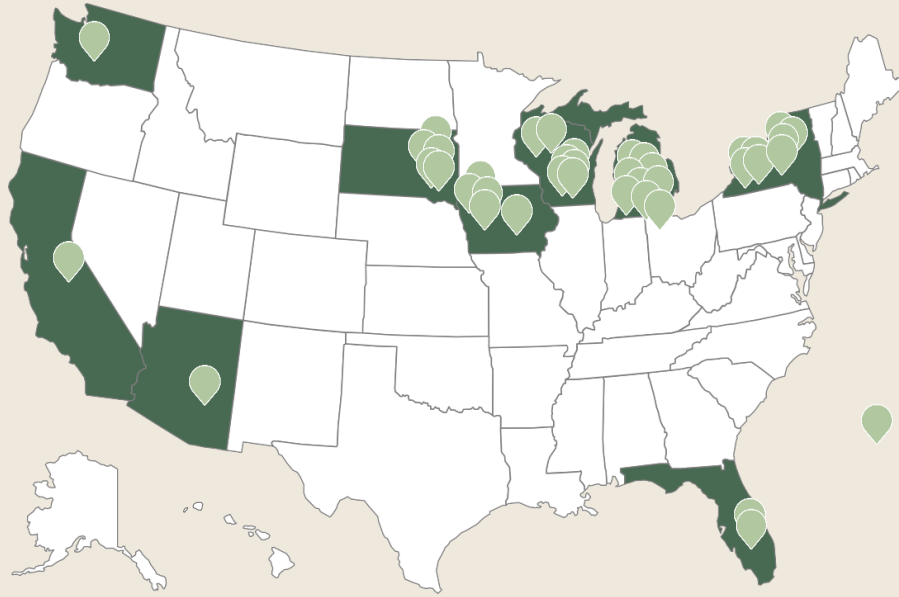


4. RE-USE

The remaining solids are turned into organic fertilizer or compost. Recaptured water is used for land application or treated at a local wastewater plant.



Anaerobic Digestion Circularity Centers



Over 30 anaerobic digestion centers across 10 states.

● Renewable Natural Gas Circularity Centers

+ These projects have reduced over 700,000 metric tons of CO₂eq. This is equivalent to carbon sequestered by more than 834,000 acres of forests annually.*

*EPA Greenhouse Gas Equivalencies Calculator

“

As dairy farmers, we can be part of the solution in helping the environment. The digester projects are a win-win because we could further process the manure while reducing greenhouse gasses.”

– **LYNN BOADWINE**

Owner Boadwine Dairy, Inc
South Dakota



The Larson Project

This fourth-generation family dairy farm is operating anaerobic digesters that collect and clean methane from cow manure and deliver it back into the local interstate gas pipeline as energy to be used by homes and businesses.

 **Okeechobee County, Florida**



KEY OUTPUTS

The digesters are anticipated to generate 171,000 mmBTU of renewable natural gas each year which is equivalent to powering 1,185 homes.

ENVIRONMENTAL IMPACT

This project will reduce over 57,000 tons of CO2 each year which is equivalent to planting over 75,000 acres of forest every year.

LOCAL IMPACT

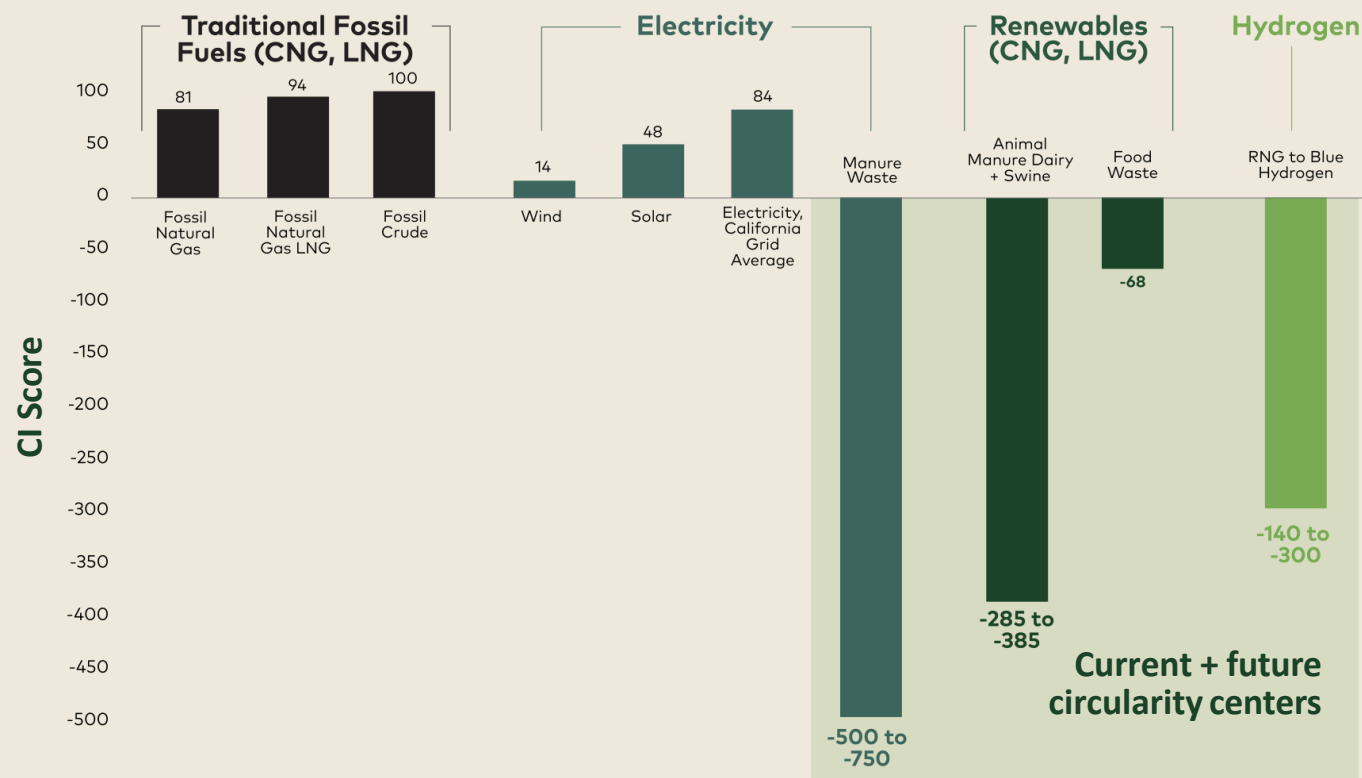
Throughout the construction process, this project will provide approximately 120 temporary jobs and 3 full-time jobs once the project is complete.

The excess fertilizer that is created throughout the process is then transferred back to the farm.



RNG has a negative carbon intensity

Renewable natural gas from dairy manure and organic waste have a negative carbon intensity compared to other forms of energy.



Power in partnerships



Curriculum with the Guy Harvey Ocean Foundation

Combining expertise on recycling & ocean conservation

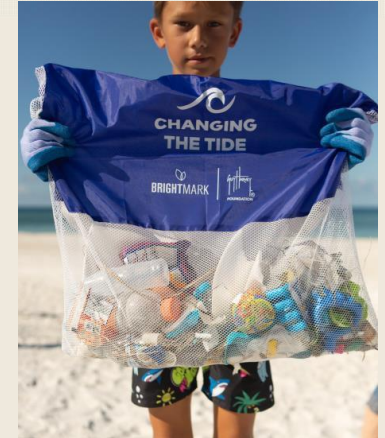
Curriculum for high school and elementary school students educating them about plastic pollution and its impact on our oceans.

Foster education

We have created a free unit that reaches students and aims to educate future generations on the impact of post-use plastic on the environment.

Our reach

To date we have reached over 38,000 students with a goal to reach 30,000 students this school year.



Tackling an ocean-sized plastic waste problem with NOAA

A new recycling program

First-of-its-kind plastics renewal program recycle buoys and downlines that usually end up in landfills.

Creating circular solutions

This hard-to-recycle marine waste will be turned into new plastics products.

“This initiative elevates our commitment to protect the environment. I’m proud that buoy team member Benjamin D’Avanzo recognized the need for a sustainable alternative to our plastics waste and pursued this partnership with Brightmark.

-SARAH FANGMAN

Florida Keys National Marine Sanctuary Superintendent



Thank you



BRIGHTMARK.COM
@brightmark



FL Dairy Farms Renewable Natural Gas (RNG) Development Opportunities, Challenges & Possible Solutions



FL Senate Agriculture Committee Briefing

NOVEMBER 7, 2023

Who is United Dairy Farmers of Florida (UDFF)?



UDFF is a coalition of family-owned farms that is **committed to producing safe, high-quality dairy products for consumers** to enjoy while advancing environmentally sustainable practices that protect our natural resources

Managed by 6-member dairy farmer Board:

- **Jacob Larson-President** (Larson Dairies-Okeechobee)
- Douglas Walker- VP (Walker & Sons Dairies-Jefferson)
- **Jan Henderson- Tres./Sec.** (Alliance Dairies-Gilchrist/Levy)
- Ben Butler (Butler Oaks Farm-Highlands)
- **Greg Watts** (Full Circle Dairy-Madison)
- **Dave Temple** (Southern Cross Dairy-Suwannee)

Board members bolded have RNG projects

One employee, Ray Hodge, Executive Director, and office is based in Suwannee County



**UDFF IS OWNED BY DAIRY FARMS
IN FLORIDA WITH MAJORITY OF
MEMBERS CLUSTERED IN MAINLY
TWO REGIONS:
THE SUWANNEE VALLEY OF NORTH
FLORIDA AND OKEECHOBEE IN
SOUTH FLORIDA**

Hurricane Idalia Impact & Recovery Update



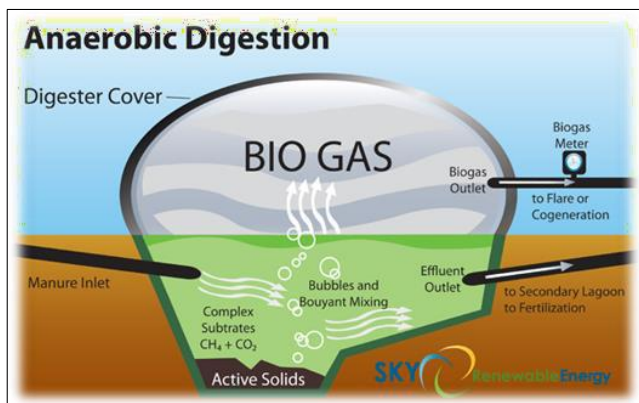
- 22 dairy farms in North FL impacted with more than \$8.0 million impact.
- Significant damage to farm buildings, irrigation, crops, equipment, and employee housing.
- Loss revenue from milk because of stress of the event which will last for months.
- Federal help is minimal and slow to come IF at all.
- **Thank you to the Florida Legislature for including farmer recovery help during the Special Session! All farmers in the region say THANK YOU!**



Dairy RNG: Digester 101



RENEWABLE NATURAL GAS BRIEFING



Biological processes in which microorganisms break down biodegradable material (manure, food waste, municipal solids, etc.) in the absence of oxygen creates and captures methane and CO₂ as a by product

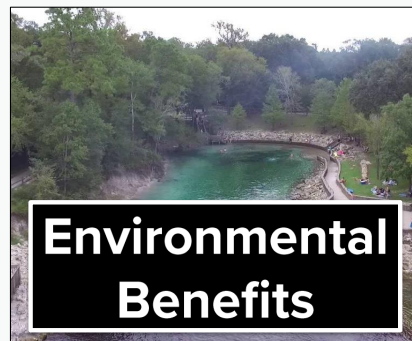
- More expensive to build
- Greater gas capture/production
- Half of the current dairy farm RNG projects are this type

- Less expensive to build
- Less gas capture/production
- Larson Dairies RNG is example of this type of digester

Dairy RNG: Benefits to Farmers, Communities & State



- Farm: Opportunity for much needed non milk revenue for farms. Paid by providing “feedstock” (manure) to capture energy. Payment based on per cow, RNG output or a combo. Usually paid on an annual basis.
- Farm: Possible lease payment on farmer land used for the system.
- Community: Jobs for fiscally constrained/rural counties.

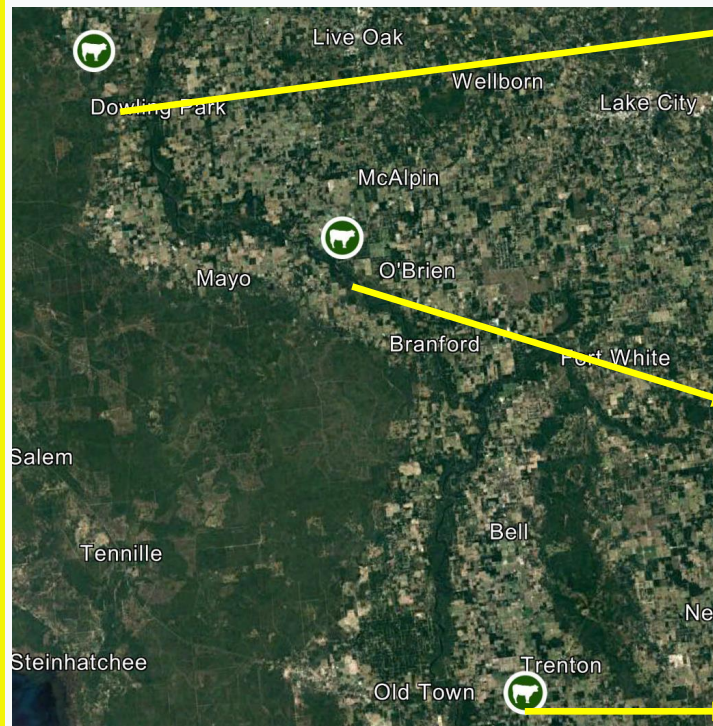


- Digesters allow for water reuse and more effective nutrient availability to crops.
- Process can eliminate a portion of the manure solids.
- Provides for more effective manure utilization/export as an organic fertilizer.
- Odor removal of manure to allow for more uses and reduced neighbor complaints.
- Capturing methane gas improves air quality.



- Improves farm resiliency through using RNG/NG powered back up systems during hurricanes.
- Helps diversify State’s Renewable Energy portfolio.
- Provides opportunities for companies in the dairy supply chain to use RNG/NG in trucking dairy products.
- Diverts feedstocks that would otherwise go to the landfills to be recycled/utilized.
- Greater export of nutrients off farms providing expansion potential for dairy farms.

Current RNG Projects on FL Dairies: **NORTH**



Full Circle Dairy

Lee, Madison County

Under construction in partnership with Florida Public Utilities which is a subsidiary of Chesapeake Utilities. Check out the below link for a video on this project:

<https://vimeo.com/837978237/a08e7ff947?share=copy>

Southern Cross Dairy

McAlpin, Suwannee County

Under construction in partnership with Avolta. Updating the first digester in the state for RNG use and not electricity. **Why?**

Alliance Dairies

Trenton, Gilchrist County

Completed in partnership with TECO/Peoples Gas. Updated the original digester for RNG and not electricity creation and use. Check out the below link for a video on this project:

<https://www.youtube.com/watch?v=YqX4OliwsOM>

NOTE: NONE OF THESE PROJECTS ARE OWNED OR OPERATED BY FARMERS.

Current RNG Projects on FL Dairies: **SOUTH**

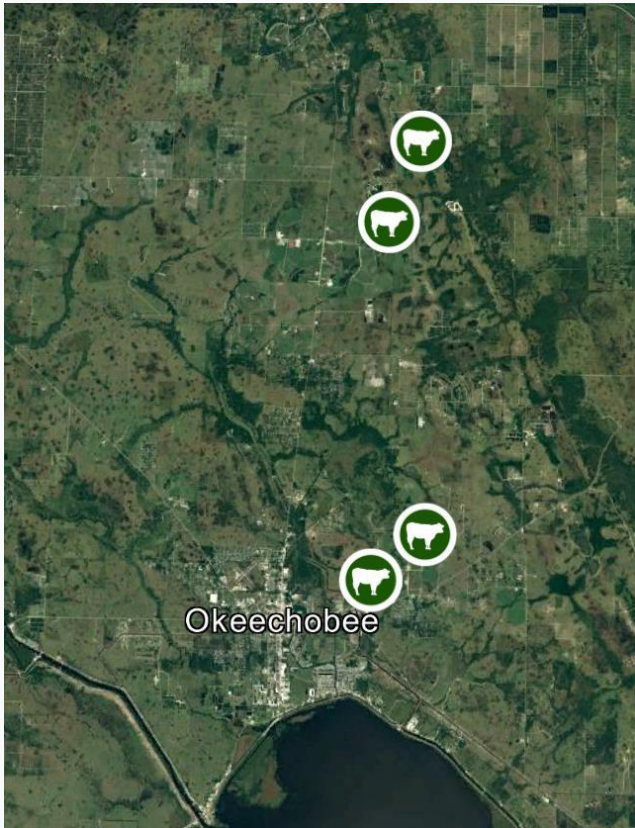


Larson Dairies

Okeechobee, Okeechobee County

Completed. New RNG systems at four of the Larson family farms in partnership with Brightmark. Below is the link to the video shown on this project:

<https://www.youtube.com/watch?v=aSrK3UT7nv8>



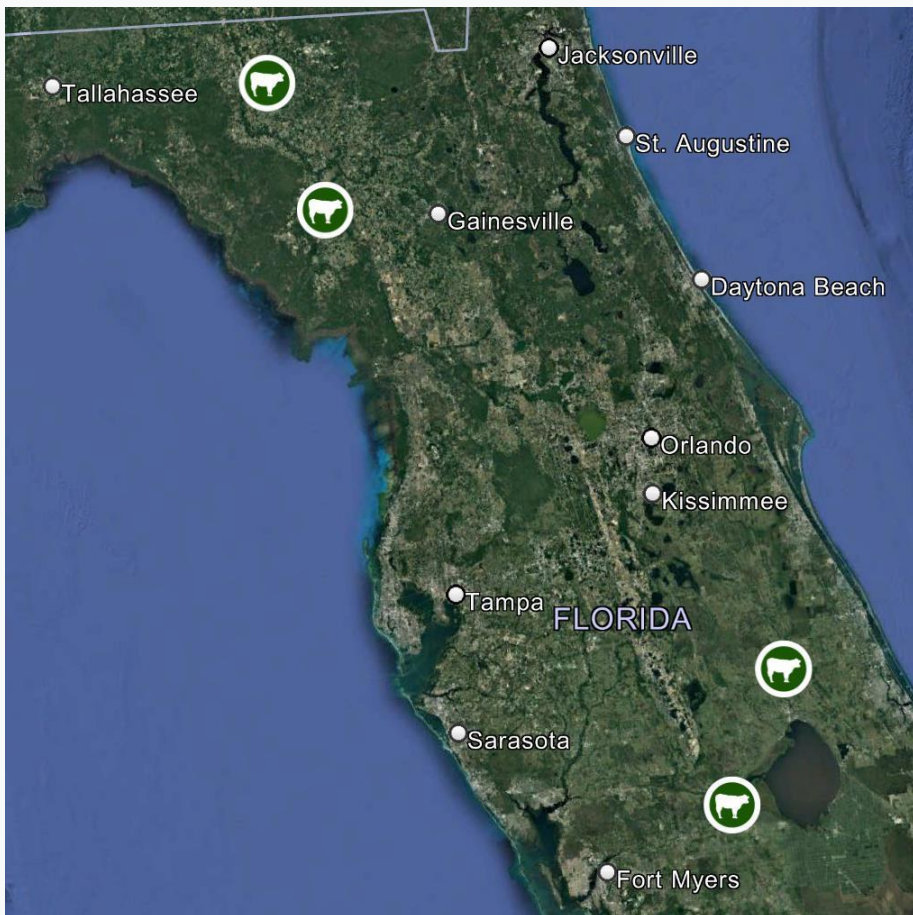
NOTE: NONE OF THESE PROJECTS ARE OWNED OR OPERATED BY FARMERS.

RNG Project Potential on FL Dairies

Tier 1: 3,000+ Cows

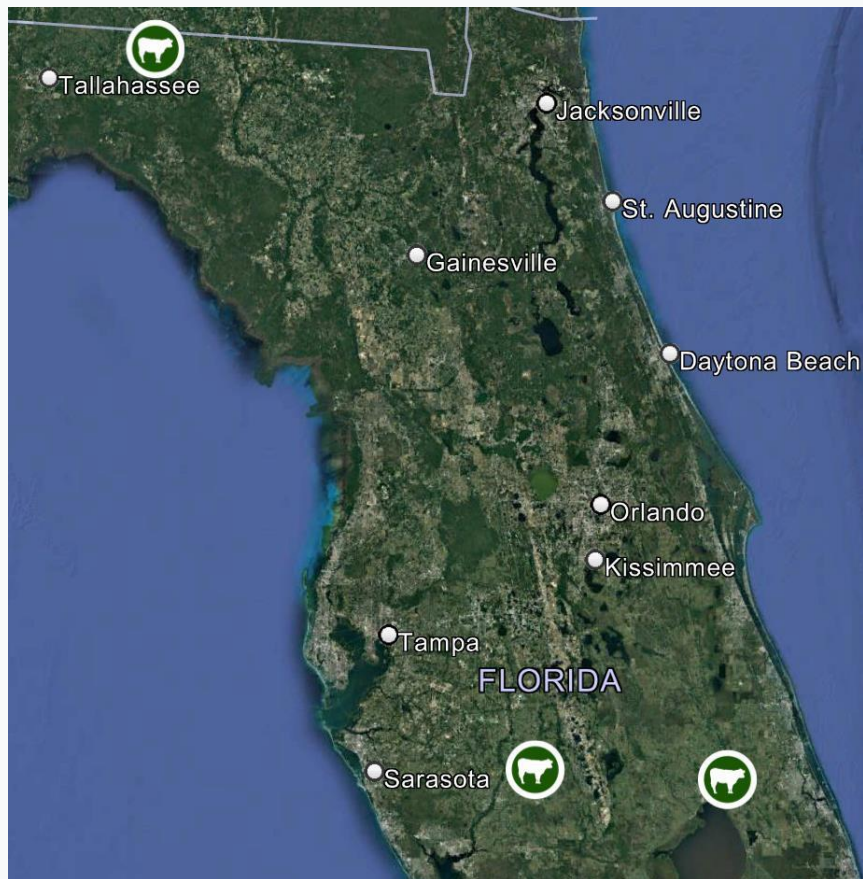


- **4 dairies** in this top tier.
- Current economic model typically means a dairy must have greater than 3K cows to produce enough RNG for project development. Thus, these dairies have the best chances for RNG development but a couple of them are on the bubble.
- All these farms have their cows in **“free stall barns”** which is required for RNG. Below is an example of such a “free stall barn” at a farm in Okeechobee that Senator Grall and staff visited recently.



RNG Project Potential on FL Dairies

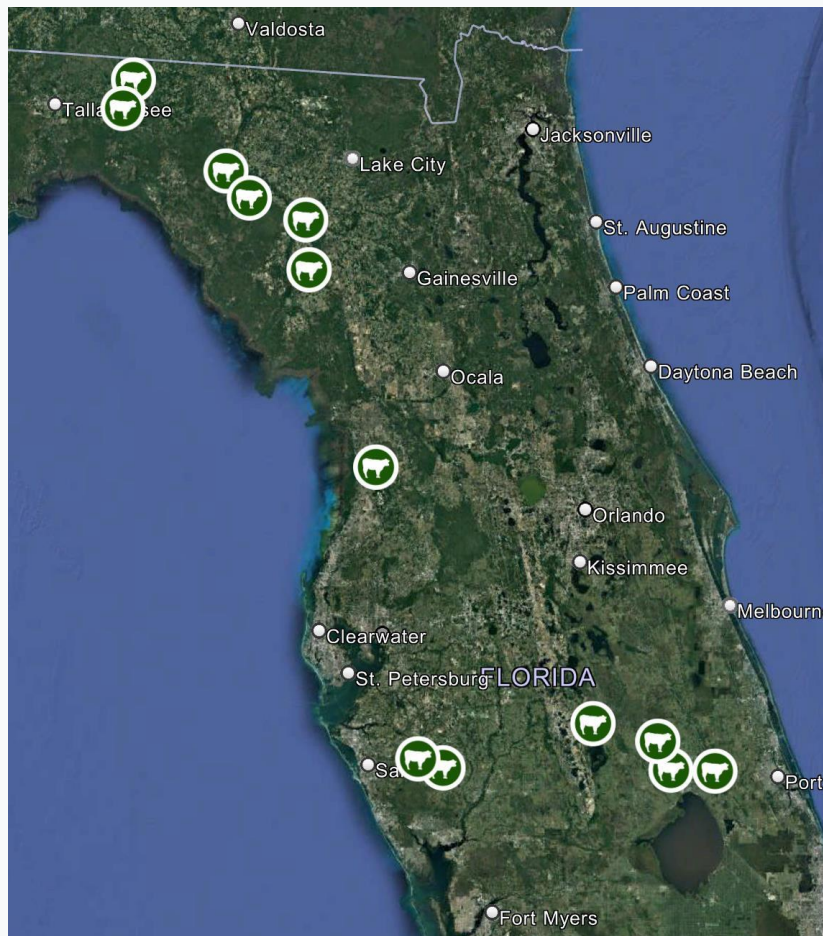
Tier 2: 2,000-3,000 Cows



- **3 dairies** in this tier. 1 of these dairies is not a “free stall barn” farm and thus unless they convert from pasture based, they won't be a candidate.
- Current economic model typically means these size of dairies don't produce enough RNG from dairy only to make projects viable.
- Thus, these farms would benefit from State policies to enhance RNG development.

RNG Project Potential on FL Dairies

Tier 3: 1,000-2,000 Cows



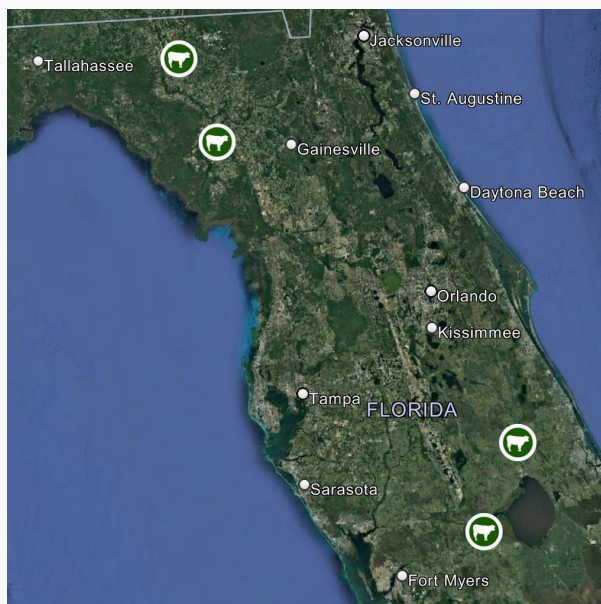
- This tier has the most dairies, **13 dairies**. 3 of these are not a “free stall barn” type farm and thus unless they convert, they won't be a candidate.
- **This group of dairies is where we have the most growth potential for RNG but will take State policy support to make projects viable with Dairy or multiple feedstocks.**
- Thus, these farms would benefit most from State policies to enhance RNG development.

RNG Project Potential on FL Dairies

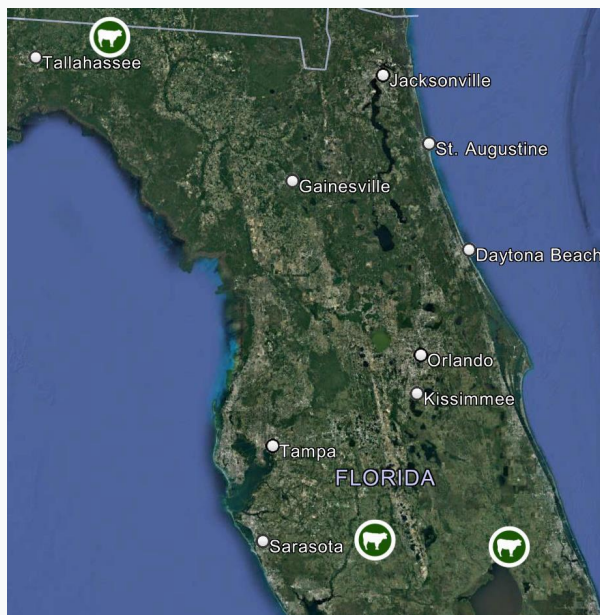
Summary



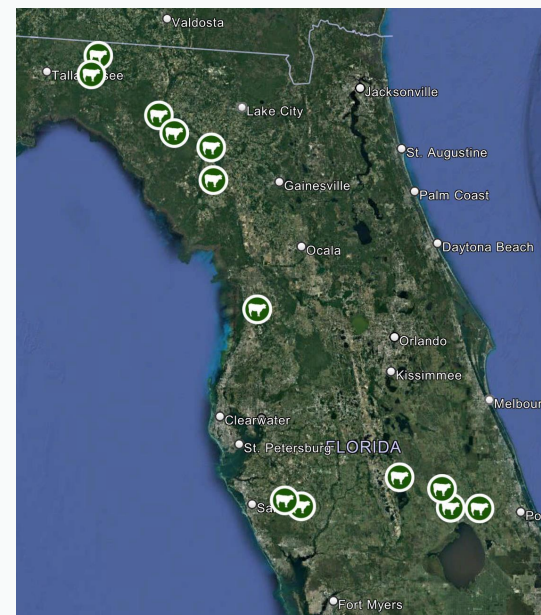
Tier 1: 3K+Cows



Tier 2: 2-3K+Cows



Tier 3: 1-2K+Cows



- **16** dairy farms in FL would benefit from State policies to enhance their chances for RNG development.
- Thus, efforts by the State/Feds should focus on these farms to try and overcome the barriers to RNG development and to expand these operations.

Challenges Keeping Some FL Dairy Farmers from Participating in RNG Development



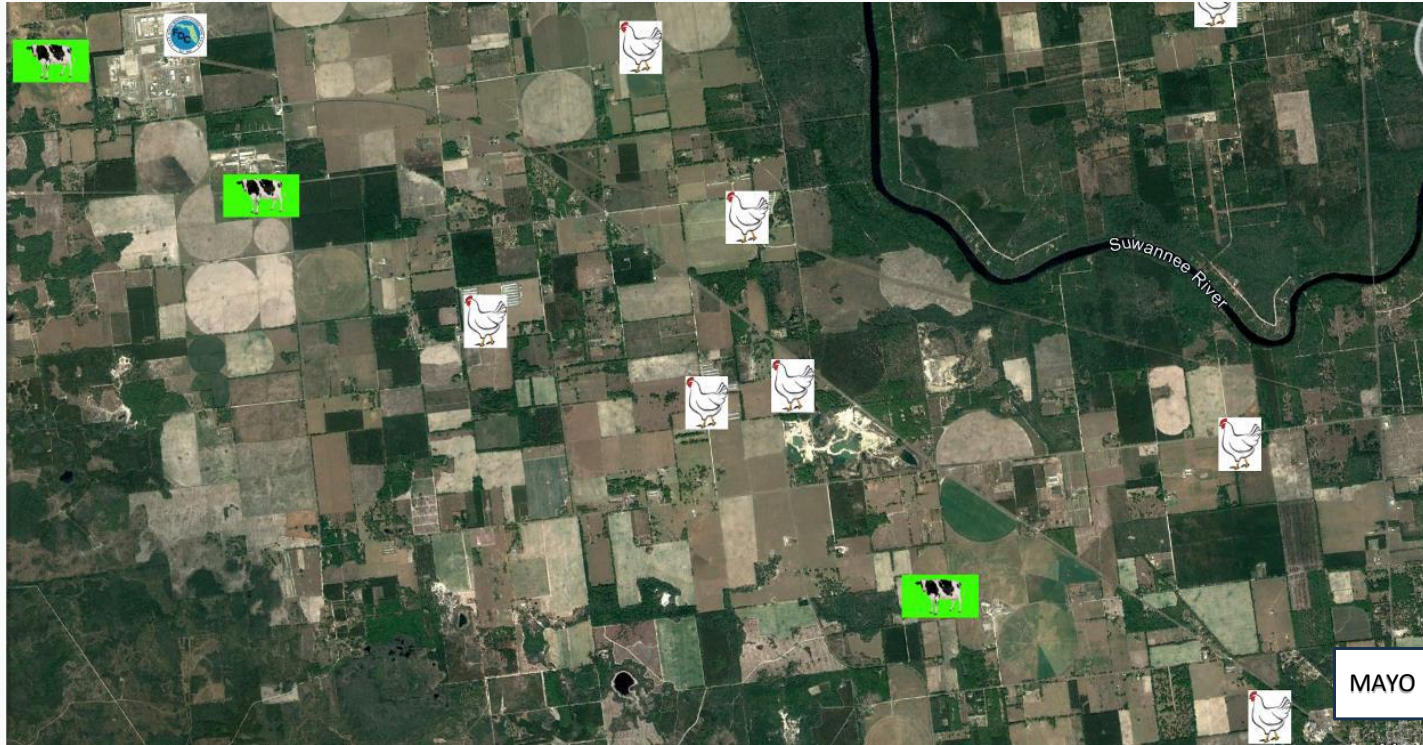
- **Herd Size:** Many farms don't have enough cows to capture/create enough gas to justify the capital expenditure for project development.
- **Location:** Some farms might be too far away from a gas line, thus excluding them or raising the project costs.
- **Farm/Animal Housing Infrastructure:** Some of the farms don't have all their cows in free stall barns which is needed to enable RNG.
- **Milk Market/Margins:** Some of the farms could grow their herds but the tight margins are not encouraging increased production.
- **Uncertainty:** Many of the farm owners are not sure about dairy farming future and thus, might not be able to commit to a contract term needed from the project developer.
- **Revenue from RNG:** The level of revenue to the farmer from a project might not be enough to justify the commitment to a project.
- **Cost of RNG Construction:** Because of the operation systems FL dairies operate under it can make the construction costs much higher for project development compared to other regions of the country.



Ideas to Overcome RNG Development Challenges:

Regional “Multiple Feedstock” RNG Projects

Lafayette

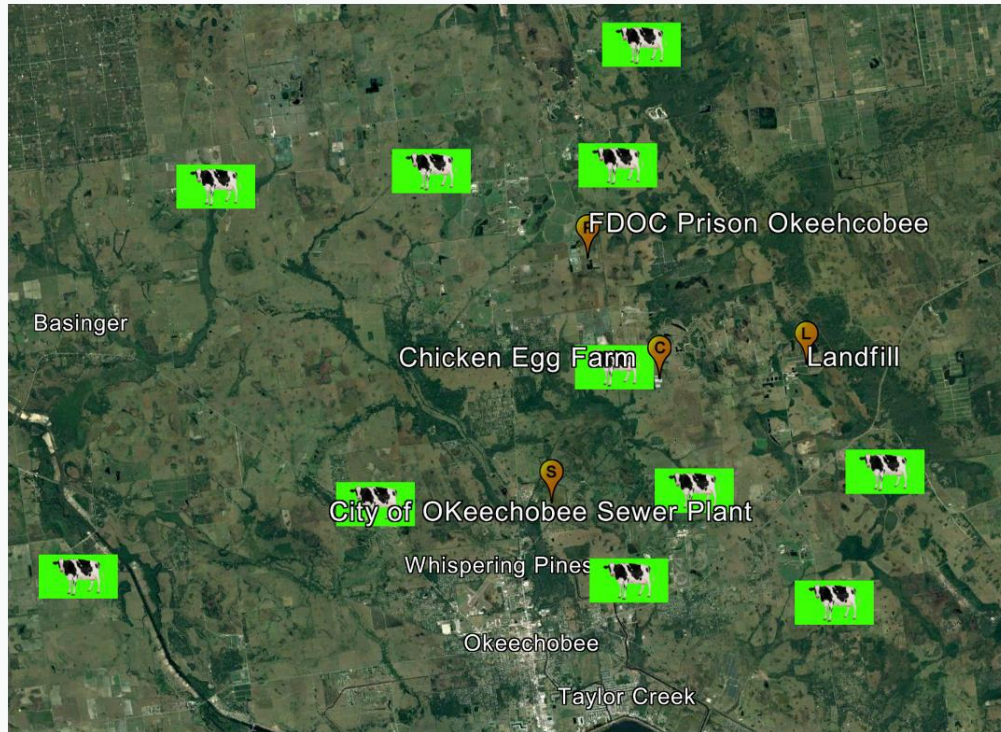


- The idea is to use multiple feedstocks in the region as shown to feed into a regional digester in addition to dairy manure.
- **Poultry Feedstock:** The litter can be a feedstock.
- **Municipal/Domestic Wastewater Facilities Solids:** The FL DOC facility and the City of Mayo could be a source of feedstock.

Ideas to Overcome RNG Development Challenges

Regional “Multiple Feedstock” RNG Projects

Okeechobee



- The idea is to use multiple feedstocks in the region as shown to feed into a regional digester in addition to dairy manure.
- **Poultry/Egg Farm Feedstock:** The litter can be a feedstock.
- **Municipal/Domestic Wastewater Facilities Solids:** The FL DOC facility and the City of Okeechobee could be a source of feedstock.
- **Landfill:** Most landfills are catching their gas for RNG and it is shown in case it plays a role in a regional project.
- **Food Waste:** There are some stand alone digesters being developed that use food waste. Could be an opportunity to add food waste to a regional system as well.

Additional Ideas to Overcome RNG Development Challenges



- Financial Support of Digester Water Quality/Reuse Components
- Enhanced Farm Facility/Infrastructure Support
- State Policies for Expanding Milk Production
- Support for RNG Use in Dairy Supply Chain
- Tax Policy
- Renewable Energy Policy Enhancements for RNG



FL Dairy Farms Renewable Natural Gas (RNG) Development Opportunities, Challenges & Possible Solutions: **SUMMARY**

- RNG on FL dairy farms can be an important part of the State's renewable energy supply.
- RNG on dairies is good for the farmer, rural communities and the environment.
- To expand RNG on more FL dairy farms it is going to take a comprehensive strategy from the State, and it needs to be farmer focused.
- UDFF places this effort as a top priority and is excited to work with the State and all the stakeholders on this effort.





FL Dairy Farms Renewable Natural Gas (RNG) Development Opportunities, Challenges & Possible Solutions

- Q/A
- Thank you for your time!
- Look forward to working with you in the future on this subject!

FL Senate Agriculture Committee Briefing

NOVEMBER 7, 2023

Contact Information for Ray Hodge:



386-209-6997



ray@uniteddairyfarmersfl.com

The Florida Senate

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Bill Number or Topic

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Committee

RNG DAIRY

Bill Number or Topic

Amendment Barcode (if applicable)

Name

RAY HODGE

United Dairy Farmers of FL

Phone

386-209-6997

Address

19039 21st Rd

Email

ray@uniteddairyfarmersfl.com

Street

McAlpin

City

FL

State

32062

Zip

Speaking:

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S-001 (08/10/2021)

11/7/23

Meeting Date

The Florida Senate
APPEARANCE RECORD

Deliver both copies of this form to
Senate professional staff conducting the meeting

Renewable Natural Gas

Bill Number or Topic

Agriculture

Committee

Amendment Barcode (if applicable)

Name **Dale Calhoun**

Phone **8506810496**

Address **201 S Monroe St Unit A**

Email **dale.calhoun@floridagas.org**

Street

Tallahassee

FL

32301

City

State

Zip

Speaking: ☐ For ☐ Against ☒ Information **OR** Waive Speaking: ☐ In Support ☐ Against

PLEASE CHECK ONE OF THE FOLLOWING:

☐ I am appearing without
compensation or sponsorship.

☒ I am a registered lobbyist,
representing:

Florida Natural Gas Association

☐ I am not a lobbyist, but received
something of value for my appearance
(travel, meals, lodging, etc.),
sponsored by:

While it is a tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this hearing. Those who do speak may be asked to limit their remarks so that as many persons as possible can be heard. If you have questions about registering to lobby please see Fla. Stat. §11.045 and Joint Rule 1. [2020-2022 Joint Rules.pdf \(flsenate.gov\)](#)

This form is part of the public record for this meeting.

S-001 (08/10/2021)

CourtSmart Tag Report

Room: SB 301

Case No.:

Type:

Caption: Senate Agriculture Committee **Judge:**

Started: 11/7/2023 1:30:22 PM

Ends: 11/7/2023 2:50:34 PM

Length: 01:20:13

1:30:27 PM	Chair Collins calls meeting to order
1:30:30 PM	Roll call, quorum is present
1:30:43 PM	Tab 1, Commissioner Wilton Simpson, Florida Department of Agriculture and Consumer Services
1:31:31 PM	Commissioner Wilton Simpson
1:41:35 PM	Questions:
1:41:42 PM	Senator Simon
1:42:34 PM	Commissioner Wilton Simpson
1:42:49 PM	Senator Boyd
1:43:55 PM	Senator Berman
1:44:38 PM	Commissioner Wilton Simpson
1:45:10 PM	Senator Berman
1:45:30 PM	Chair Collins
1:46:16 PM	Tab 2, Mike Joyner, Florida Fruit and Vegetable Association
1:46:27 PM	Mike Joyner
2:04:29 PM	Chair Collins
2:04:48 PM	Questions:
2:04:51 PM	Senator Baxley
2:07:21 PM	Commissioner Wilton Simpson
2:07:36 PM	Chair Collins
2:10:08 PM	Senator Rouson
2:11:12 PM	Commissioner Wilton Simpson
2:12:57 PM	Tab 3, Presentation by Brightmark and Larson Dairy Farms on Renewable Natural Gas Project
2:13:10 PM	Keyna Cory, Brightmark
2:19:45 PM	Ray Hodge, United Dairy Farmers of FL
2:40:25 PM	Dale Calhoun, Florida Natural Gas Association
2:42:53 PM	Questions:
2:42:56 PM	Senator Berman
2:43:10 PM	Ray Hodge
2:43:23 PM	Keyna Cory
2:43:51 PM	Ray Hodge
2:44:04 PM	Senator Berman
2:44:24 PM	Ray Hodge
2:45:30 PM	Chair Collins
2:46:17 PM	Senator Boyd moves to adjourn
2:46:21 PM	Meeting Adjourned