

DC FOOD SYSTEM ASSESSMENT & FOOD ECONOMY STUDY

District of Columbia
Food Policy Council



Food Policy Council

- 12 members appointed by Mayor
- VISION: Create a just, healthy, equitable and sustainable food system for all by engaging, empowering, and informing DC residents and effecting positive policy change.
- Promote food access, food sustainability, and a local food economy, including non-mainstream producers
- Monitor regulatory barriers to the local food economy, including barriers to
 - farmers markets,
 - existing food assets
 - job creation potential
- Collect and analyze data on the local food economy and food access in the District, including an assessment of food deserts; and
- Monitor and research national best practices in food policy, and determine how they could be implemented in the District.
- *Applying an Equity lens to all that we do.*



DC's Food System

- 38 farmers markets, 5 open year round
- 55 full-scale grocery stores
- 67 healthy corner stores
- 63 community gardens in DC
 - More than 1800 plots/gardeners
 - ~26.5 acres under cultivation
- 103 active school gardens
- 8+ commercial farms
- 147 locations for free summer meals
- 35+ CSAs delivering in DC
- 800+ Community members participating the Food Policy Council



Food System Assessment

- **Introduction**

- DCFPC – basics & about
- Goals
- Study area
- Methods

- **Agricultural Production**

- Natural Resources – farms
- Urban agriculture
- Community gardening

- **Food Processing and Distribution**

- CSA coops
- Aggregation, Wholesale, and Distribution
- Manufacturers

- **Consumption**

- Farmers markets
- Grocery Stores
- Restaurants
- Food security
- Emergency food
- Farm to School
- Health information

- **Wasted Food**

- Food waste assessment
- Community examples or initiatives

- **Economic Results**

- Supply & Demand
- Consumer spending -
- Employment US Census Bureau (# of employers and employees)
- Lost revenue
- Food system assets
- Gaps in the food system

- **Recommendations**

Food System Assessment: Agriculture

- 7 State Region - Delaware, DC, Maryland, New Jersey, North Carolina, Pennsylvania, Virginia, & West Virginia
- Cornmeal, blueberries, chicken, pigs & dairy can meet demand
- Only 7% of \$16.8 billion spent annually on fruits and vegetables in DMV is spent on foods produced in the region
- 61 community gardens in DC
- 16 farms (producers for or non-profit)
- Outputs not measured by USDA ag census
- Key barrier to agriculture is affordable land

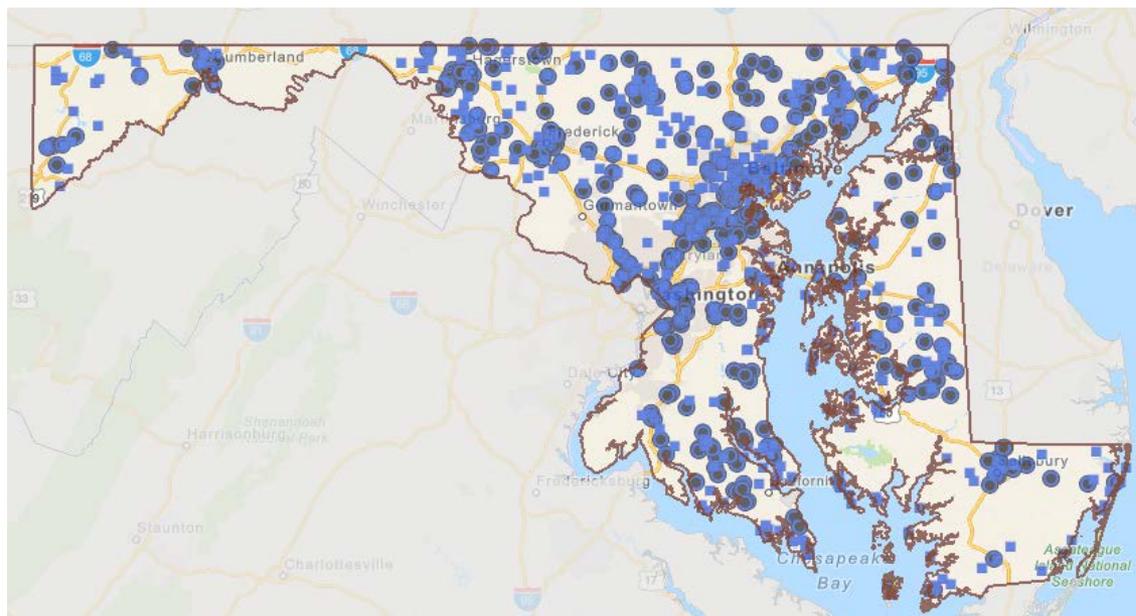


Food System Assessment: Production & Distribution

- 7.75% of all businesses in DC are food-related
- Restaurants account for about 66% of all food-related establishments in DC, grocery stores at ~10%, caterers/food service contractors 7%, and beer, wine, and liquor stores 6%
- 2012-2016 Restaurants have increased by 1.1%, grocery stores have decreased by 3.7%, food service contractors/caterers have increased by 0.5%, and beer, wine, and liquor stores have increased by 2.2%
- $\frac{1}{4}$ of all food-related jobs in the DMV area are in DC
- Food-related employment has risen & wages have risen

Food System Assessment: Production & Distribution

- 14 registered food wholesalers in DC
- Primarily food processors & distributors from surrounding states
- 26 food hubs within 200 miles of DC, DCCK in DC



Made in DC: DC Food



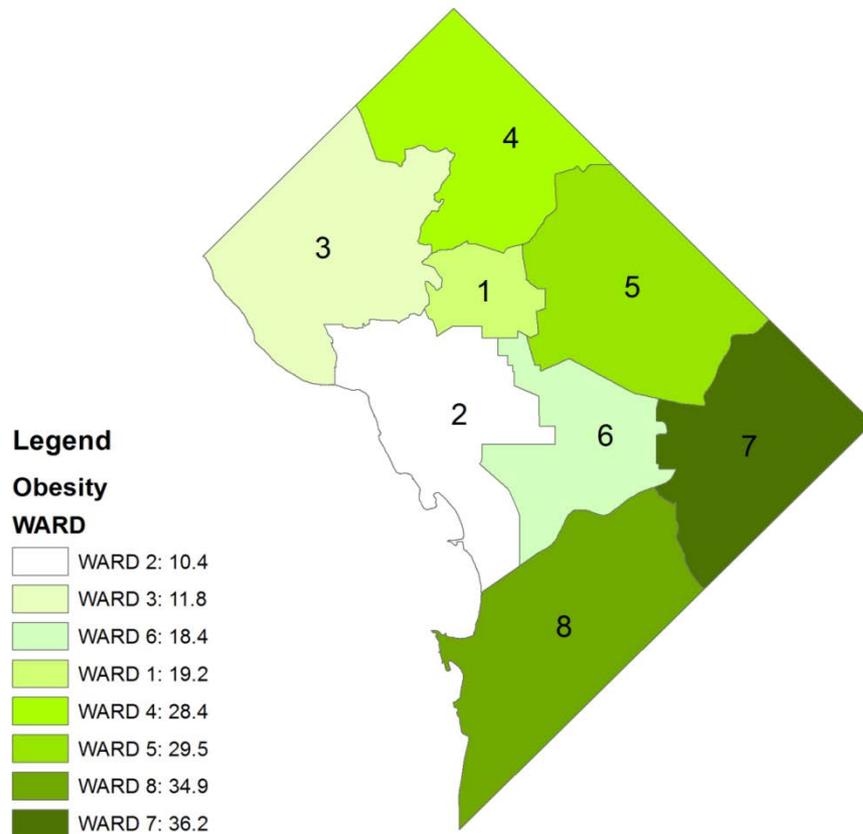
- 88 food businesses registered
- Develop an brand of District created products, raise awareness of locally crafted products, promote the purchase of locally crafted products, and provide support to help businesses utilize the brand
- Create a Innovation Studio Space and Marketplace to support the local arts, craft, and maker community by providing low-cost membership for access to studio space, high-end equipment, sales space, and classrooms.



Food System Assessment: Consumption & Health

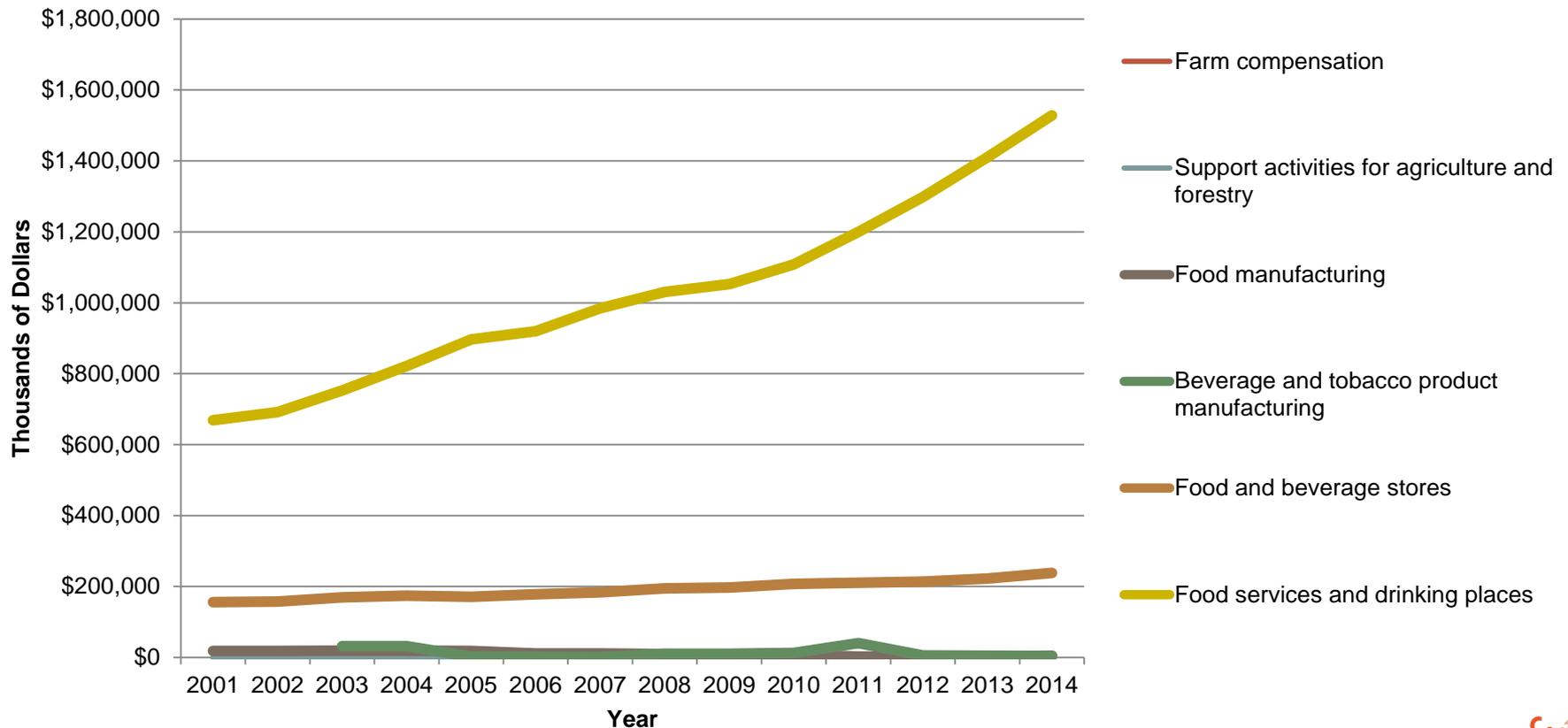
- 51 Grocery stores in DC
- 53 Farmers markets in DC
- 32 CSA serving DC
- 1900+ restaurants
- Wards 4, 5, 7, and 8 highest obesity & stress levels about food access
- 1% of aver. annual spending for individuals in DC MSA is on fruits & vegetables

Figure 14. Prevalence of Obesity by Ward, District of Columbia, 2012



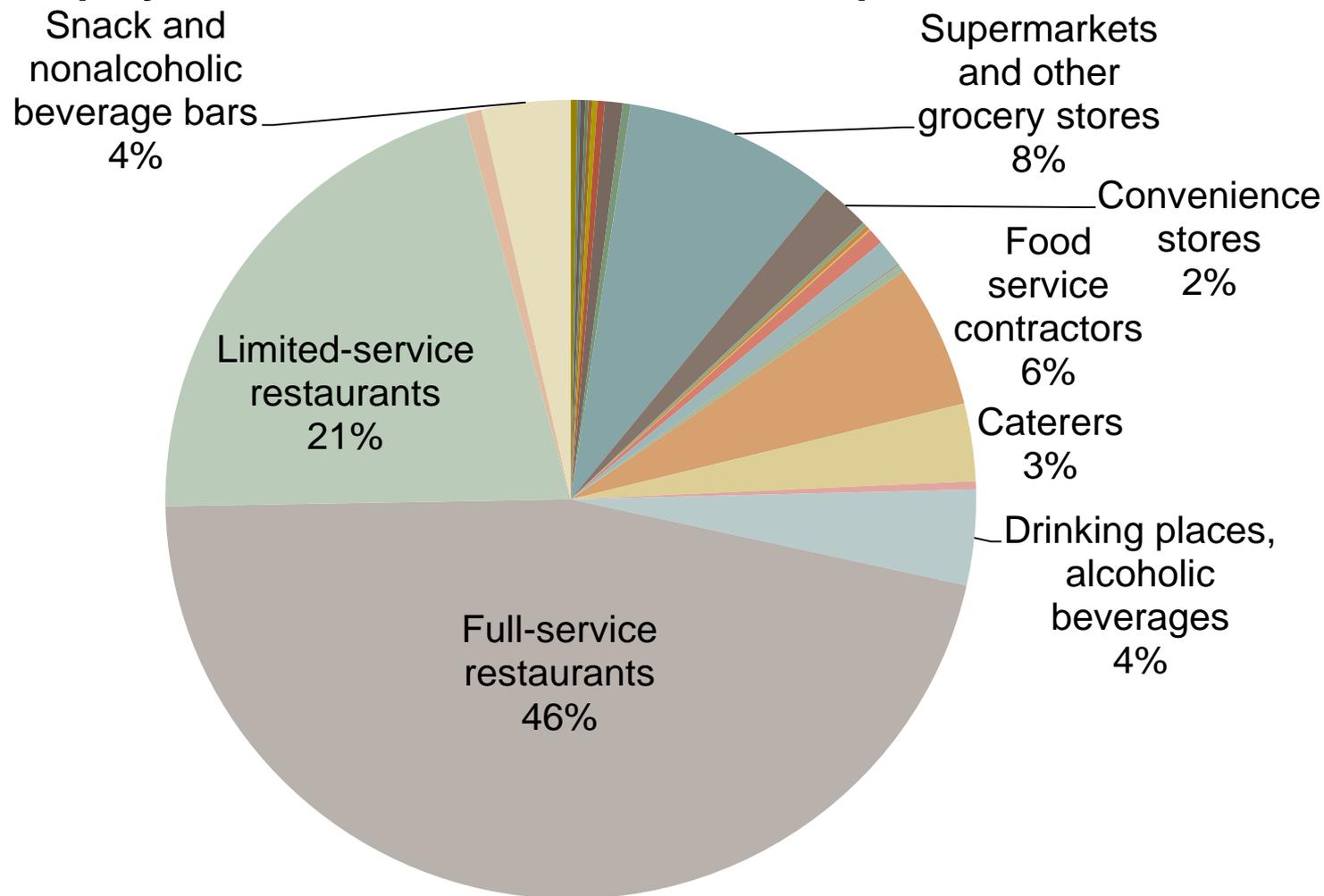
Food System Assessment: Consumption & Health

Change in Food-Related Employee Compensation



Food System Assessment: Consumption & Health

Employees in Food-Related Business, September 2015



Food System Assessment: Wasted Food

- Food Waste Pilot DPW Spring 2017
- Community Compost Cooperative
- Save Good Food Amendment Act of 2017
- DC Food Recovery Network
- MEANS database/ Food Rescue Apps
- DC DGS/DCPS in-school composting
- Private haulers



Food Economy Study

- Purpose:
 - Build on a baseline assessment of the District's food system
 - Define the local food business cluster
 - Analyze changes and trends
 - Define the parameters of the local food economy
 - Identify gaps and opportunities
 - Create recommendations for a strategy to support and grow the local food economy

Food Economy Study

- **Review existing food economy data** and analyze employment data and historic and projected future trends for the District and limited data and trends for the surrounding region.
- Estimate the economic and fiscal benefits of current conditions including jobs associated with the **local & surrounding regional food economy**.
- **Interview and survey businesses** in the food sector cluster to get in-depth information and case study material about business subsectors.
- Understand the **challenges and business opportunities** for the local and regional food sector.
- Summarize **trends** in employment, payroll, and number of establishments from 1990 through most recent period available.
- Prepare a **Food Industry Cluster Graphic Map**, visually showing the components of the full industry cluster, and known linkages such as local supply chain networks.
- **Share findings** on the local food system economy with stakeholder groups through in-person meetings, presentations, and reports. Examples: Local Food Business and Labor Development working group of the DCFPC, District agencies, or select community members and organizations as needed.
- Develop a **report** sharing findings
- Recommend a **high-level strategy** of next steps in economic development for the food sector within the District.