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%
- ¼ 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
Food System Assessment: Consumption & Health

Change in Food-Related Employee Compensation

Thousands of Dollars

Year

Farm compensation
Support activities for agriculture and forestry
Food manufacturing
Beverage and tobacco product manufacturing
Food and beverage stores
Food services and drinking places
Food System Assessment: Consumption & Health

Employees in Food-Related Business, September 2015

- Supermarkets and other grocery stores: 8%
- Convenience stores: 2%
- Food service contractors: 6%
- Caterers: 3%
- Drinking places, alcoholic beverages: 4%
- Full-service restaurants: 46%
- Limited-service restaurants: 21%
- Snack and nonalcoholic beverage bars: 4%
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.