

SAFSF Presentation

June 22, 2011



FOOD HUBS

VIABLE REGIONAL DISTRIBUTION

SOLUTIONS



Food Hubs are Pivotal for Re-Regionalization

- **Need:** Appropriate scale infrastructure
- **Method:** Engage with existing, as well as create new infrastructure options
- **Results:**
 - Facilitates job creation
 - Bolsters regional food economies
 - Supports supply chain for those with reduced food access

BUT we are early on
in the evolution of these systems



National Food Hub Collaboration



First phase of collaboration:

- Identify existing food hubs
- Develop a greater understanding of the scope and scale of food hub operations, and their challenges and opportunities for growth, by:
 - Carrying out focus groups with industry stakeholder groups
 - Conducting an online survey with food hubs and “public” markets, and
 - Carrying out phone interviews with a survey sub-sample of food hubs and public markets.



Preliminary Findings: Food Hub Survey*

Food Hub Survey

- Online survey was sent to 72 food hubs and 36 “public” markets in January 2011.
- Surveys completed by Feb. 7 were included in analysis.
- 45 food hubs completed the survey (63% response rate).
- 25 “public” markets completed the survey (69% response rate).



Food Hub Online Survey



● Completed Survey
● Sent Survey

	West	Southwest	Midwest	South	Northeast	TOTAL
Sent Survey	11 (15%)	5 (7%)	22 (31%)	15 (21%)	19 (26%)	72
Completed Survey	7 (16%)	2 (4%)	13 (30%)	8 (17%)	15 (33%)	45

“Public” Market Online Survey



	West	Southwest	Midwest	South	Northeast	TOTAL
Sent Survey	5 (14%)	3 (8%)	8 (22%)	8 (22%)	12 (33%)	36
Completed Survey	5 (20%)	3 (12%)	5 (20%)	5 (20%)	7 (28%)	25



Regional Food Hub Definitions

Definitions vary from narrow market efficiency functions to those related to visions of building a more sustainable food system

Working Definition*

A centrally located facility with a business management structure facilitating the aggregation, storage, processing, distribution, and/or marketing of locally/regionally produced food products.

**USDA is working with its partners to refine this definition. This is NOT an official USDA definition.*



Core Components of Food Hub

1) Aggregation/Distribution-Wholesale

- Drop off point for multiple farmers and a pick up point for distribution firms and customers that want to buy **source-identified** local and regional food

2) Active Coordination

- Hub business management team that **actively coordinates supply chain logistics**, including seeking market for producers, and coordinating efforts with distributors, processors, and buyers

3) Permanent Facilities

- Provide the space and equipment for food to be stored, lightly processed, packed, palletized and possibly even sold under a Hub's regional label

Other Possible Services: Provide wholesale and retail vending space, offer space for health and social service programs, community kitchens, community meetings, etc.



“Food Hub” Model Examples

- **Non-profit driven model:** Alba Organics (CA), Intervale Center (VT), Growers Collaborative (CA), Red Tomato (MA), Common Market (PA), Local Food Hub (VA)
- **Producer/Entrepreneur driven model:** Grasshopper (KY), Good Natured Family Farms (KS), Tuscarora Organic Growers (PA), New North Florida Cooperative (FL), Eastern Carolina Organics (NC), Cherry Capital Foods (MI)...
- **Retail driven model:** La Montanita Food Coop (NM), Wedge’s Coop Partners (MN), Weavers Way Coop (PA)....
- **Consumer driven model (online buying clubs):** Oklahoma Food Coop, Nebraska Food Coop, Iowa Food Coop...
- **“Hybrid” market model (wholesale/retail food markets):** Central New York Regional Market Authority (NY), Eastern Market (MI), Hunts Point Wholesale Farmers Market (NYC), Santa Monica Farmers Market (CA), “State Farmers Markets” in the Southeast and Midwest, e.g., NC, SC, MI, FL...
- **“Virtual” Food Hubs (online matchmaking platforms):** Ecotrust’s FoodHub (www.food-hub.org), Locally Grown (www.locallygrown.net), Local Dirt (www.localdirt.com), Local Orbit (www.localorb.it), Market Maker (<http://national.marketmaker.uiuc.edu>)...



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LOCAL FOOD HUB

Charlottesville, Virginia

- 501 c 3
- opened July 2009
- start-up cost: \$300K
- start-up funding from:
county economic development ,
local foundations, individual
donations, in-kind contributions





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Regional Food System Components



**Food Hubs vs.
Existing Food Distribution
System**



Supply Chain vs Value Chain

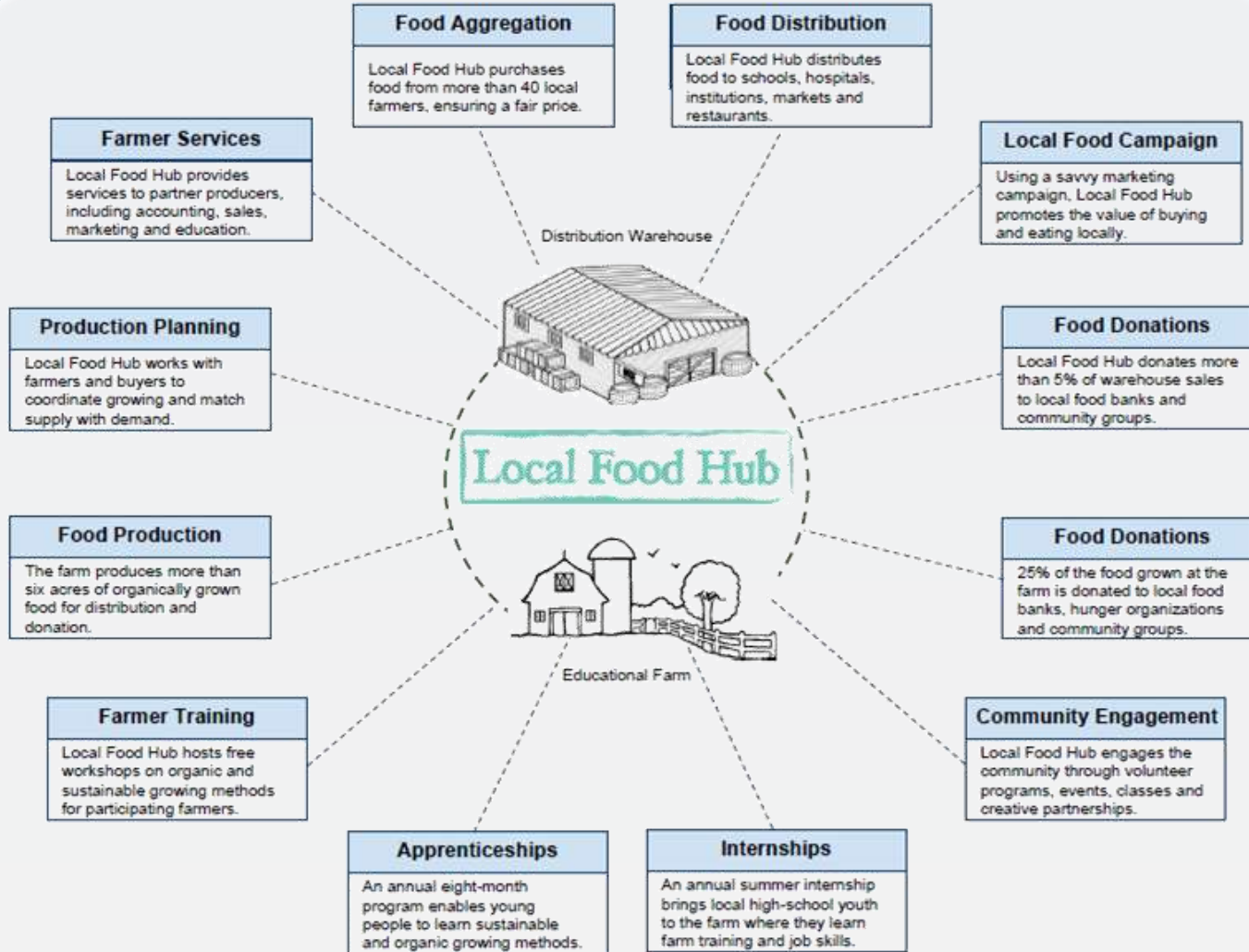
Supply Chain

- Transaction-based
- Time horizon: Short-term
- Commodity
(suppliers are interchangeable)
- Communication only with next step of the chain
- “Each person for themselves” attitude

Value Chain

- Relationship-based
- Time horizon: Long-term
- Highly differentiated products
(source identified, valued product attributes)
- Communication/Transparency
THROUGHOUT the chain
- “We’re in this together” attitude

+ SERVICES PROVIDED:





ECONOMIC DEVELOPMENT:



- Partner Producers report that working with LFH increased their farm sales by an average of 20% and 60% plan to increase food production
- So far, LFH has reinvested over \$600K in the local farming community through purchasing
- 100% of Partner Producers rate purchase pricing from fair to good
- LFH services assist in retaining more than 200 agricultural jobs

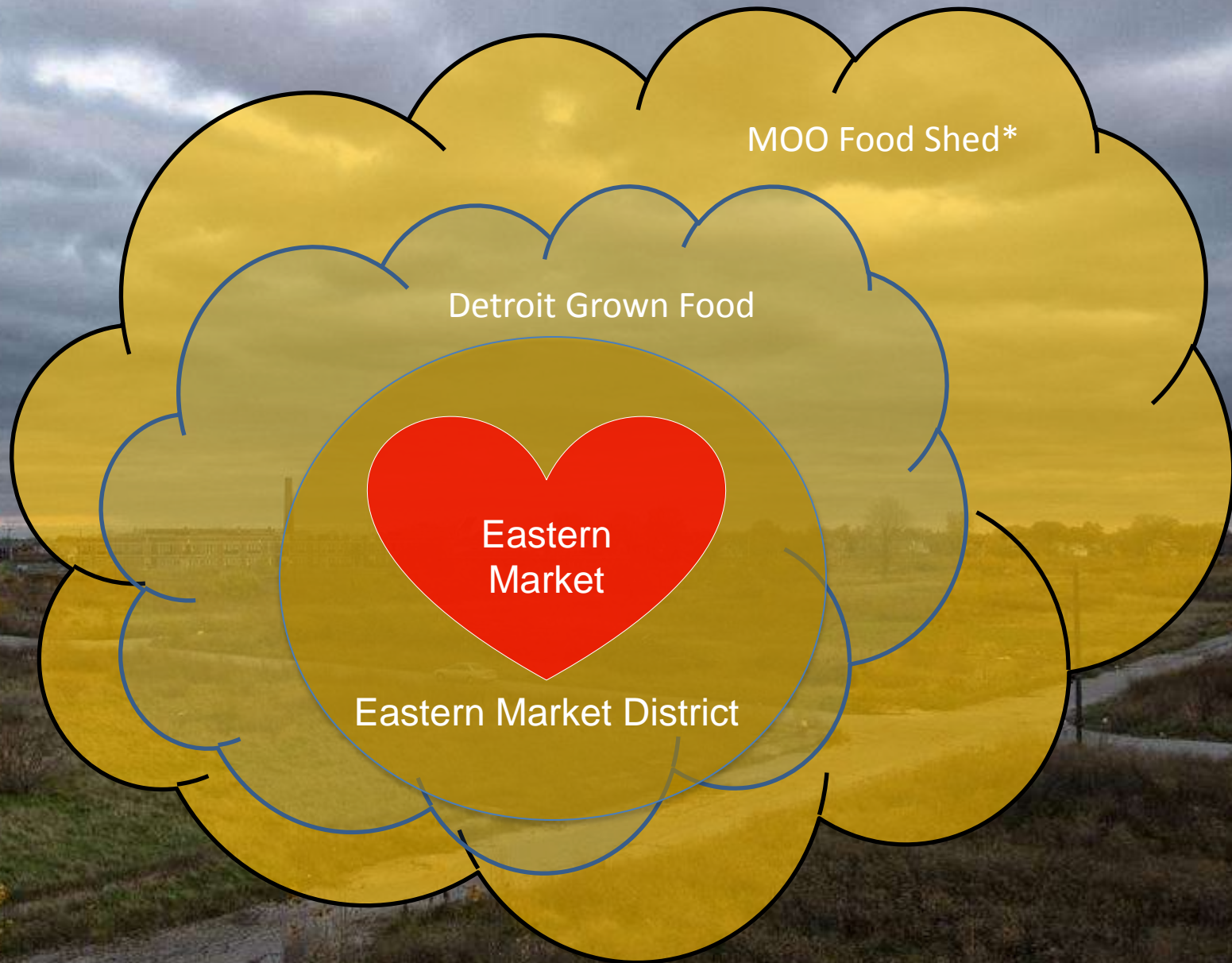
The economics of re-localizing food production are enormous for cities of all sizes. Methodology developed by Michael Shuman estimates the following economic impact to Detroit of obtaining 20% of food from local sources:



New Jobs	4,719
Business Taxes	\$ 19,632,494
Increase earnings	\$124,754,720

Suppliers

(growers, producers, farmers)



- The SE Michigan Regional Food Shed – One of America’s Strongest
- *Michigan, Ohio, & Ontario

Different markets at Eastern Market



- ✓ **Year Round Saturday Retail Public Market**



- ✓ **Seasonal Wholesale Market for Regional Growers**



- ✓ **Cluster of 80 Adjacent Food Businesses**



- ✓ **Plants & Flowers**



- ✓ **Use of Market Facilities for Special Events**



The Greening of Detroit Detroit Market Garden project, in the heart of the Eastern Market District, will showcase growing methods and business models related to small scale specialty crop production.



TYPES OF FARMS BENEFITING:



- **60+ farms participating**
Primarily Fruit & Vegetable Producers
(a few chicken, ground beef/pork, eggs, value-added)
- **1 to 500 acres in production**
- **Agricultural sales of \$2,500 - \$2 million annually**
- **Commitment to pursuing sustainable growing practices**





Food Hub Suppliers



Number of Food Hub Suppliers

Average	Median	Range
77	40	4 – 450



Size of Public Markets*

- **Retail/Outdoor:** Space sometimes described using city blocks as unit.

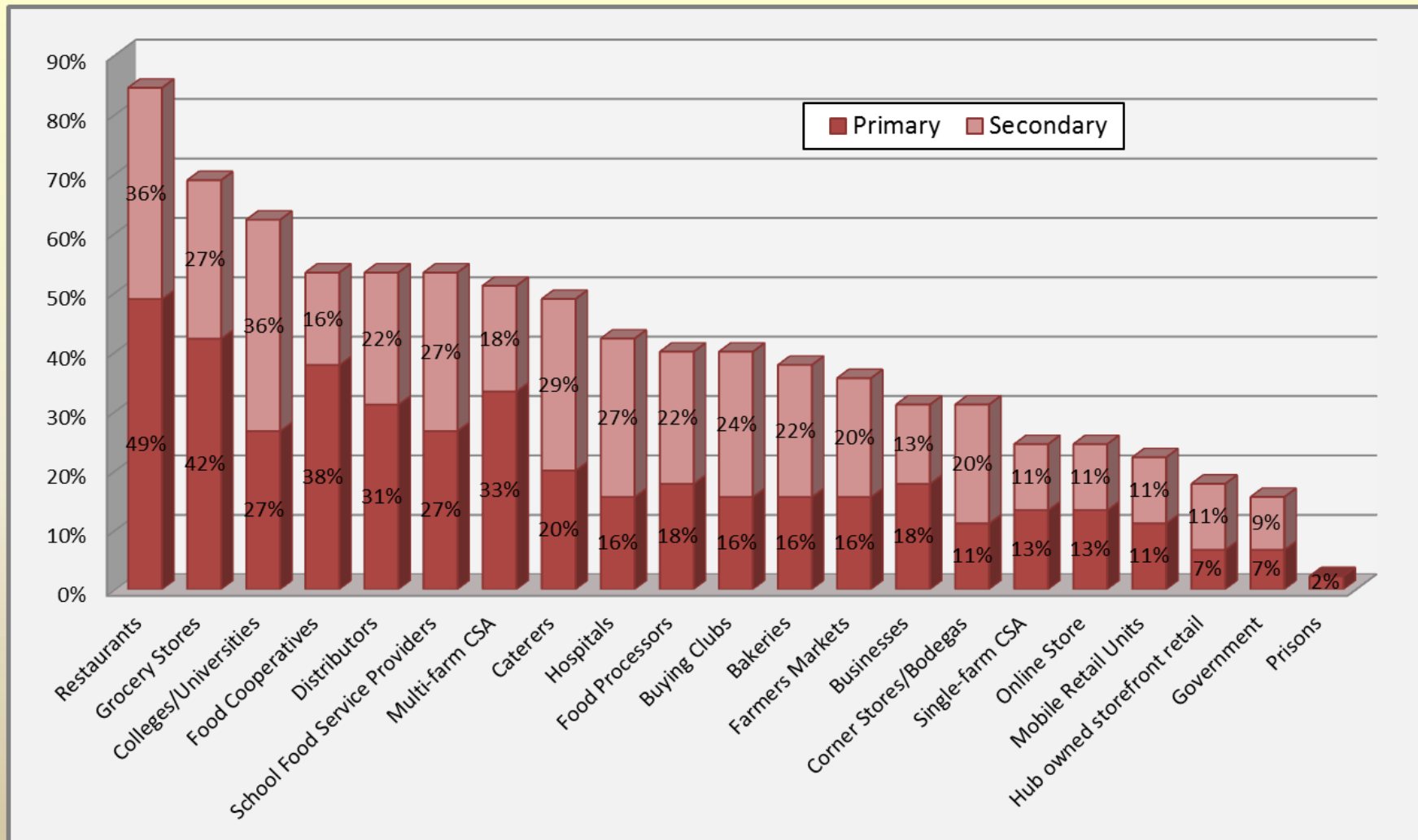
	Wholesale	Wholesale /Retail	Retail /Indoor	Retail /Outdoor
Tenants (ex. crafts)	15 - 35	92 - 300	60 - 150	29 - 175
Indoor (sq ft)	175,000 - 500,000	3,800 - 200,000	10,000 - 78,000	
Outdoor (# stalls)		83 - 400		4 - 80

*Variable responses, rough approximation

Buyers

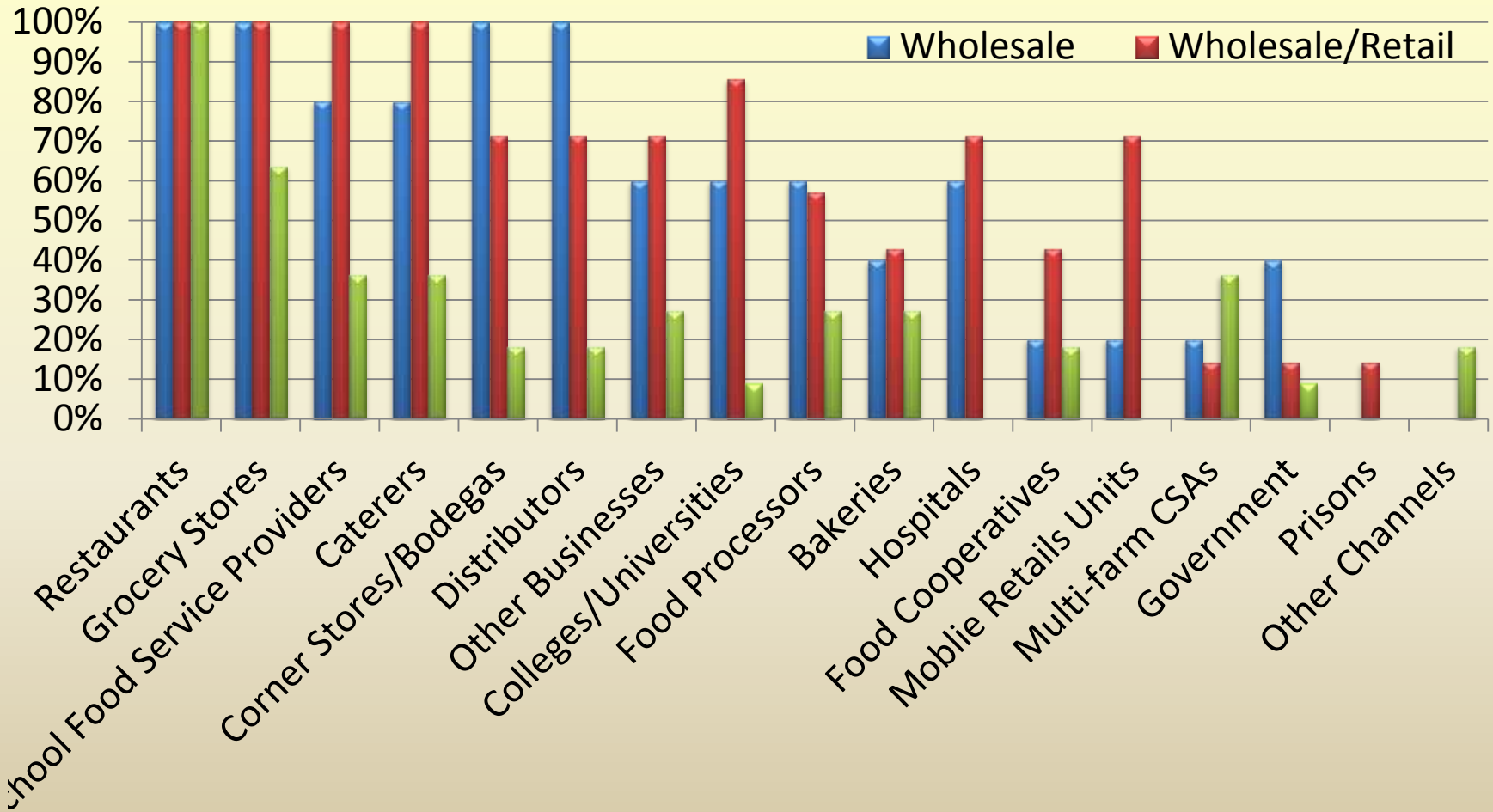


Food Hub Buyers/Customers





Wholesale Supply Channels of Public Markets



Niche Processing Opportunities

Classroom serving sizes just one niche to fill.



EMC is partnering with the Detroit Public Schools to help them convert 30% of their \$16 million annual food purchases from highly processed to Michigan grown and minimally processed.

Increasing Food Access & Improving Health



INCREASING ACCESS, IMPROVING HEALTH:



Buyers Report Increasing Local Food Purchases By An Average Of **30%**
As A Result Of Working With Local Food Hub

BUYERS INCLUDE:

- Distributors
- Institutions
 - hospitals
 - K-12 schools
 - University dining
 - senior centers

- Grocery stores
- Restaurants
- Caterers
- Processors



INCREASING ACCESS, IMPROVING HEALTH:



- In hospital cafeterias and patient trays- tomatoes, salad mix, summer squash, strawberries, apples...
- Offer a weekly local food market for staff, patients, guests

Over 30,000, students have regular access to fresh, local snacks and cafeteria items – melons, berries, apples, tomatoes, broccoli, peppers, potatoes, grass-fed ground beef...



INCREASING ACCESS, IMPROVING HEALTH:



Targeting low-income communities:

- Partnership with Boys & Girls Club to organize Pop-up, Local Food Markets in low income neighborhoods
- Partnership with Parks & Recreation Summer Food Program
- Partnership with Food Banks for fresh produce donations



The Role of Food Hubs in Healthy Food Access

- 21 out of the 45 food hubs in the survey (47%) are actively distributing food products to food deserts
- 12 of these food hubs also partner with other organizations to ensure healthy food access in underserved communities
- 4 additional food hubs not actively distributing to food deserts, partner with other organizations that are working to increase food access in food deserts
- **Bottom Line: Well over 50% of the food hubs in the survey are actively involved in ensuring healthy food access to underserved communities**

Legal Status of Food Hubs



- 8 of the 21 food hubs (38%) distributing food products in food deserts got foundation funding to assist in starting their operations.

Balancing Supply and Demand

Supply and Demand

- Market management new to active coordination role
- Actively looking at growth areas
- Mix of wholesale and retail is an opportunity
- Some high-price, some lower-price food – allows wide variety of demands to be met



+ PRODUCTION PLANNING:

- Review sales figures, work with Buyers to make projections
- Report projected crop demand and target pricing range to Producers by December
- Pre-order crop volume from Producers by mid-January





PRODUCTION PLANNING RESULTS:

- Helps Producers make planting schedule and business plan
- Ensures LFH more consistent supply



Infrastructure

+ CURRENT INFRASTRUCTURE:

DISTRIBUTION WAREHOUSE:

3,000 sqft. cooler, 200 sqft. freezer, office, loading dock, fork lift, 16 ft refrigerated truck, 5 f/t staff



EDUCATIONAL FARM:

60 acres certified organic land, large greenhouse, packing shed, box cooler, barn for classes, housing for farm managers and apprentices, farm equipment, office, 3 f/t staff, 5 seasonal apprentices, 3 summer interns



NEEDED INFRASTRUCTURE:



In pilot phase, financial support to supplement paying staff who are doing daily work of fine-tuning this sustainable local food hub model and resources to enable us to export the model to other groups effectively.



- **High tunnels to extend seasons, conserve water and protect crops from pests**
- **Funding to grow the beginning farmer training programs**

Eastern Market 360°

Capital Improvement Program

Shed 3 renovated in 2009

\$10 million invested to date

Spectacular civic space:

- Makes for a more compelling winter market
- Provides opportunity for hosting more special events

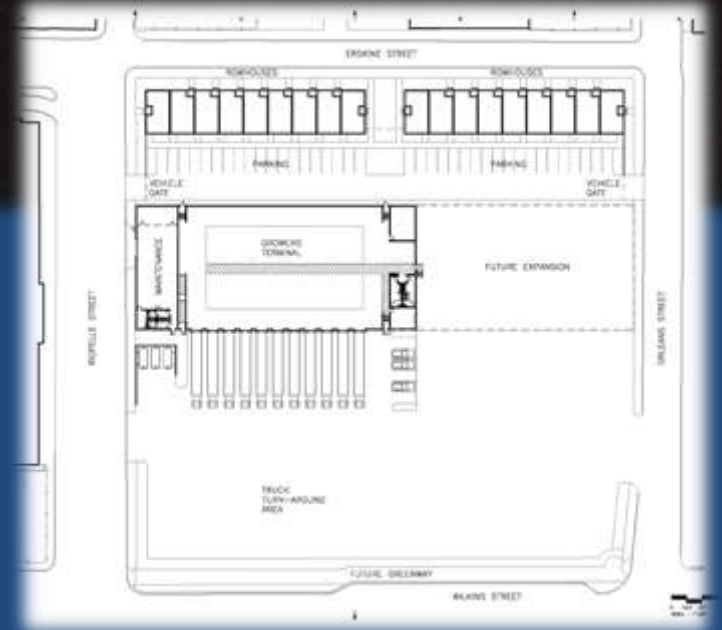


Eastern Market 360° Facility to better serve our wholesale market



Grower's Terminal

- Refrigerated space is needed to reduce costs and meet more stringent food handling requirements and to become a more robust wholesale hub



Eastern Market Commissary

To support mobile food operators and street food vendors



Workforce

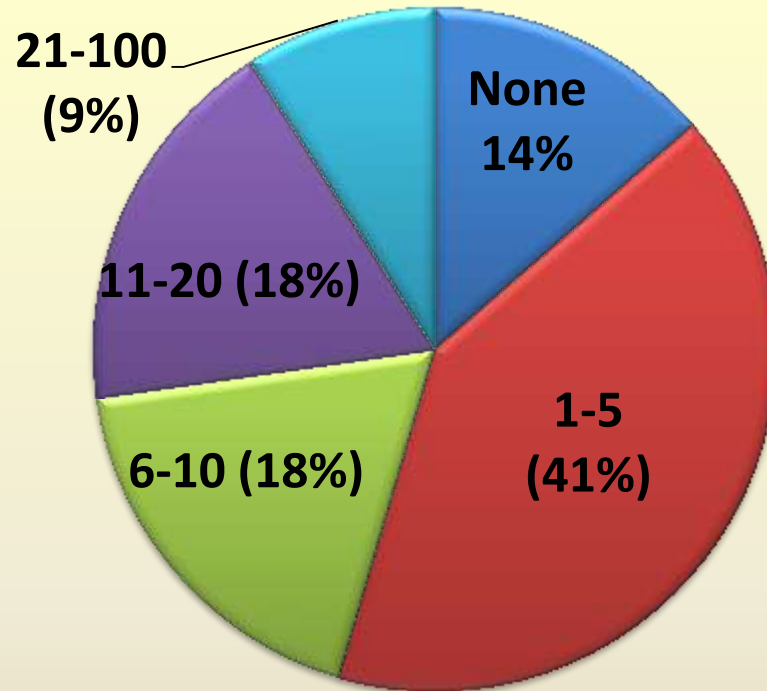


Food Hub Workforce



Food Hub Workforce	Average	Median	Range
Full-time paid	7	3	0 – 112
Part-time paid	5	3	0 – 40
Regular Volunteers	5	1	0 – 30

Public Market Workforce



	Full-time	Part-time /seasonal	Regular Volunteers	One/two-time Volunteers
AVERAGE	11	3	17	22
MEDIAN	5	3	8	5
RANGE (MIN)	0-94	0-7	0-100	0-100



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Services



FARM SERVICES:

- On-farm technical training to scale up production sustainably and with good land stewardship practices
- Liaison between government agencies and small farmers - grant awareness, infrastructure needs



+ EDUCATIONAL TRAINING:

- Hands-on, paid Apprentices and Internships for aspiring young farmers
- Established farmer workshops– Integrated pest management, crop rotation, farm business planning, GAP
- Community workshops – backyard gardening, growing fruit trees, SPIN gardening, canning



+ COMMUNITY ENAGEMENT:

- On-farm events – plant sales, barn dances, speakers, meals
- Volunteer opportunities – planting, mulching, harvesting
- Team building – businesses, school groups



Improving Eastern Market as a retail destination does not solve food access issues for those residents without access to good transportation.

Eastern Market has also been working with partners to develop five pilots to get food from its Wholesale Market into underserved areas.

The Fresh Food Share Food Box Program is a joint venture with Gleaners Community Food Bank and the Greening of Detroit.



Fresh Food Share Volume 1 Number 2
February 2010

February Weather Can be Frightful!
You can be sure you're in the middle of a Michigan winter when the sun's rays are warm on your skin, and the rest of the calendar says you know what the weather is. In fact, you should think of the cold as just one more reason to spend more time in the kitchen, preparing delicious dishes from all the fresh food in your box. Hopefully you'll enjoy a little bit of happiness in this chilly, late 1920's Flint or whatever that reminds you of summer!

Fresh Produce Just Around the Corner
The Fresh Food Share you find in your front yard is a great source of produce. But, where do you go when the food in your box runs out? There is a store near you that you can pick up that occasional carrot or bunch of string beans. The Detroit FRESH project has been bringing fresh fruits and vegetables to a corner store near you. Detroit FRESH, a project of SEED Wayne / Wayne State University, Corporation, is working with Eastern Market Corporation, to increase the quality and quantity of fresh produce available at their store shelves. As we all know, eating fresh fruits and vegetables is important for our health, but those options are not always convenient or affordable. Through this project, Corner Store, including Kandi's Party Store, and Shopper's Market, are able to offer fresh produce in their neighborhoods. If you are tired of trying different produce and without knowing the locations of the stores, see the list below for participating in the Detroit FRESH project. If you'd like to recommend a store in your area contact Corinne Isahay at 313.377.2296 or corine.isahay@gmail.com.

Your Share This Month

Apples	Grapefruit	Potatoes	Spinach
Bananas	Oranges	Peppercorn	Tangerines
Carrots	Pears	Radishes	Walnuts
Celery	Pears/Bosc		

Site Information

Detroit Edison Public School Academy Nancy Givens 313-833-2200 x189 1001 Wayne Detroit, 48207 Pick up: Friday 9am-4pm	Detroit Waldorf School Susan Chavakis 313-425-9655 2535 Burns Detroit, 48214 Pick up: Friday 3-4pm	Hannan House Rachel Heath 313-833-1800 x28 4730 Woodward Detroit, 48201 Pick up: Friday 11am-12:30pm
St. Charles Parrish Brody Stelmach 313-822-8000 x74 3490 Berkley Detroit, 48214 Pick up: Friday 4-6pm	St. Vincent de Paul Bernice Carlsom 313-393-2100 3000 Grand Detroit, 48207 Pick up: Friday 9am-4pm	



Neighborhood Farmers' Markets and AM Fresh Farm Stands

EMC is working with community groups to build a sustainable network of neighborhood markets and operates Farm Stands at places that cannot support a Farmers' Market.





Sign up to receive email updates!

Email Address

Zip

SUBMIT

HOME

HOW IT WORKS

LATEST NEWS

PARTNERS

ABOUT US

HOW IT WORKS

When a person eligible for SNAP (Supplemental Nutrition Assistance Program) uses his or her SNAP Bridge Card to shop for food at a farmers' market, the amount of money that he or she spends is matched with Double Up Food Bucks bonus tokens. The tokens can then be exchanged for Michigan-grown fruits and vegetables.

STEP
1

Shoppers use their SNAP Bridge Cards to purchase fresh food at participating farmers' markets.

STEP
2

For every \$2 spent, shoppers receive \$2 worth of bonus tokens. Shoppers receive up to \$20 in tokens per visit.

STEP
3

Shoppers buy Michigan-grown fruits and vegetables with their Double Up Food Bucks tokens.

STEP
4

Growers who receive the Double Up Food Bucks tokens in exchange for their produce then return the tokens and are reimbursed with cash of an equal amount.

Food Voucher Programs

Voucher program to create an incentive for SNAP benefit recipients to eat fresh fruit and veggies while supporting local farmers.

In 2011 from June to Thanksgiving

1

Detroit Eastern Market

2934 Russell Street
Detroit, MI 48207
Saturdays 5am – 5pm

2

East Warren Avenue Farmers' Market

NE corner of Bishop Avenue &
East Warren Avenue
Detroit, MI 48215
Saturdays 10am – 3pm

3

Peaches & Greens Store and Mobile Food Truck

8838 Third Avenue
Detroit, MI 48201
Tuesday to Friday 10am – 7pm
Saturdays 10am – 4pm

Enhanced Health Programming

at Eastern Market & Neighborhood Markets



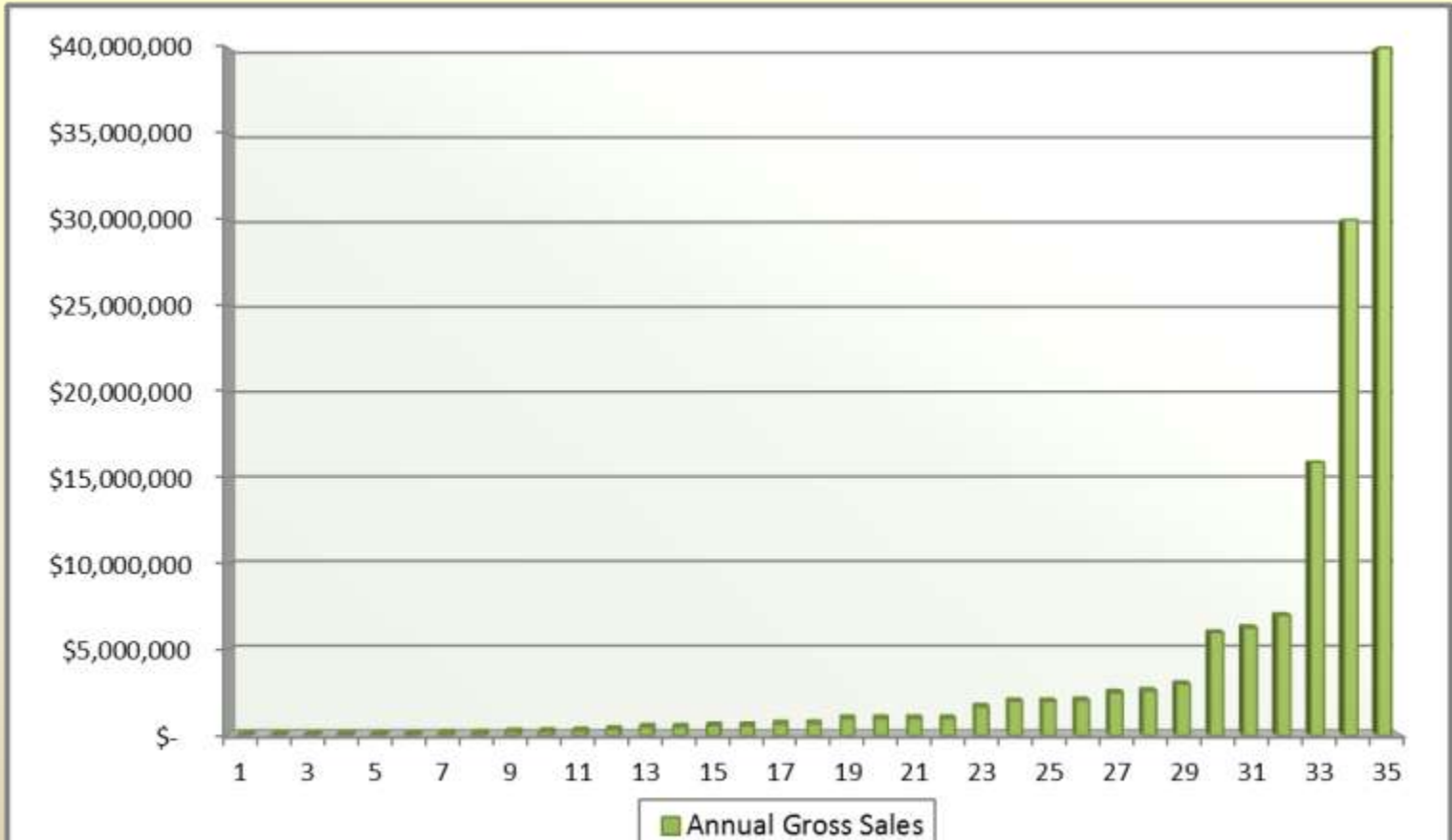
Music and dramatic vignettes
to promote healthy eating

Expand Eastern Market Cooking
Demonstrations and take them
on the road.

Financials



Annual Gross Sales by Food Hub for 2010

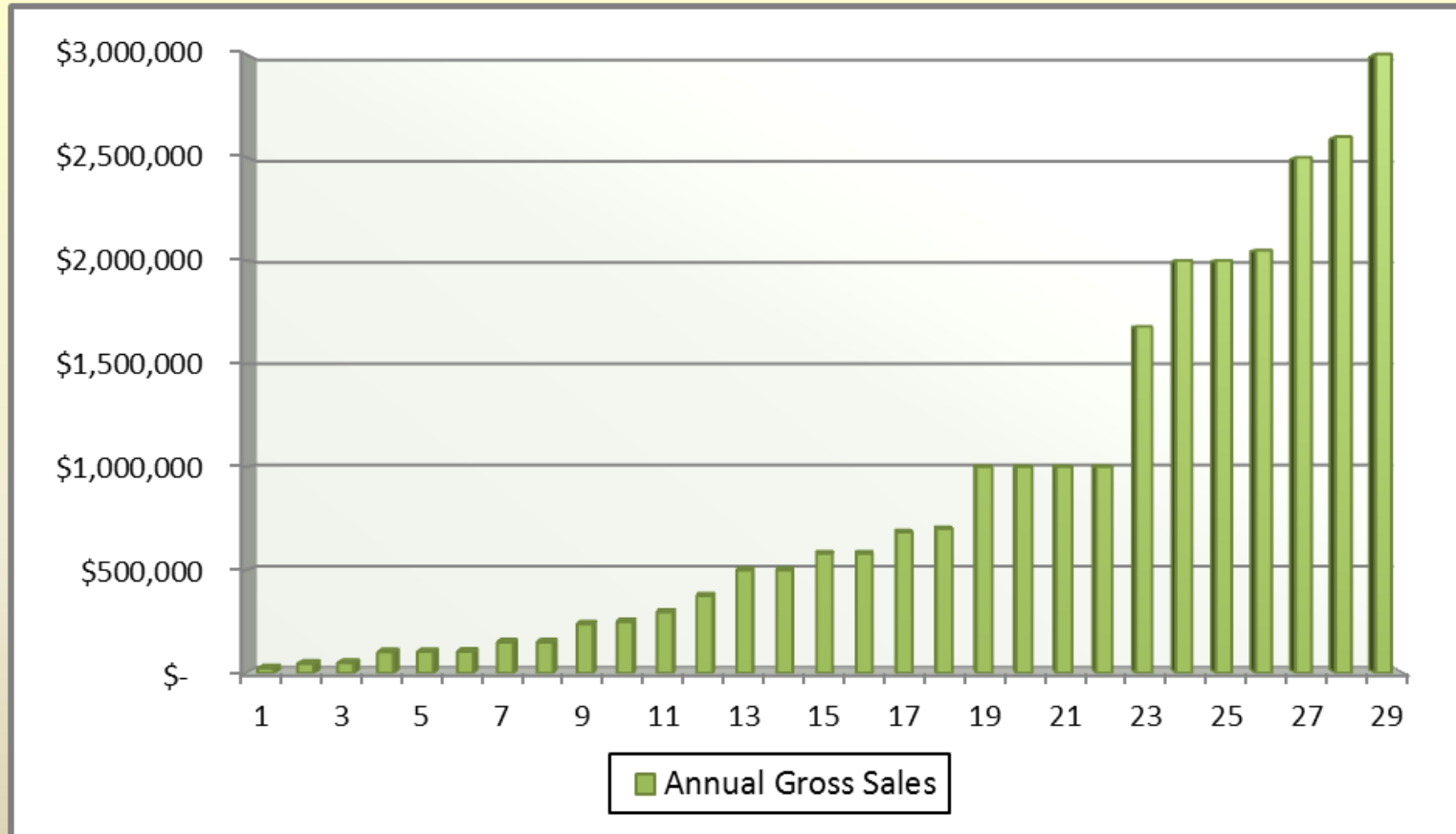


N	Ave. Sales	Median	Range
35 Food Hubs	\$3.7 million	\$700,000	\$46,000 to \$40 million



Annual Gross Sales by Food Hub for 2010

- sample of 29 food hubs grossing 3 million or less -



N	Ave. Sales	Median	Range
29 Food Hubs	\$871,000	\$580,000	\$46,000 to \$3 million



Public Market Annual Gross Sales

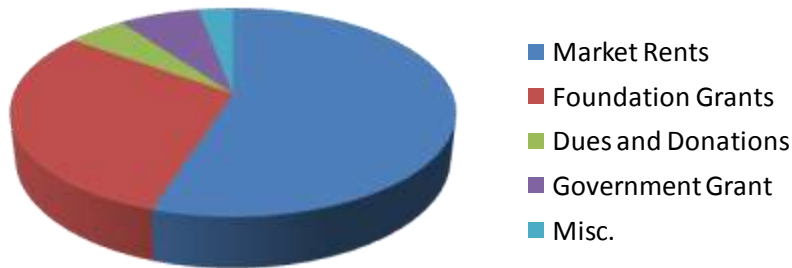
	Wholesale	Wholesale /Retail	Retail /Indoor	Retail /Outdoor
Unknown	3	5	1	4
Estimated	0	1	1	1
Known	2	1	3	3

- **Range of Annual Gross Sales: \$185,000 – \$100,000,000**

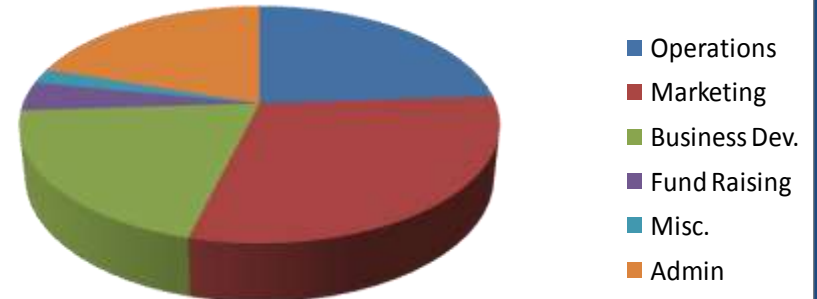
Operations Budget

60% of the revenues needed to fund operations come from Market activities

Revenue
\$1,873,660



Expenses
\$1,873,660



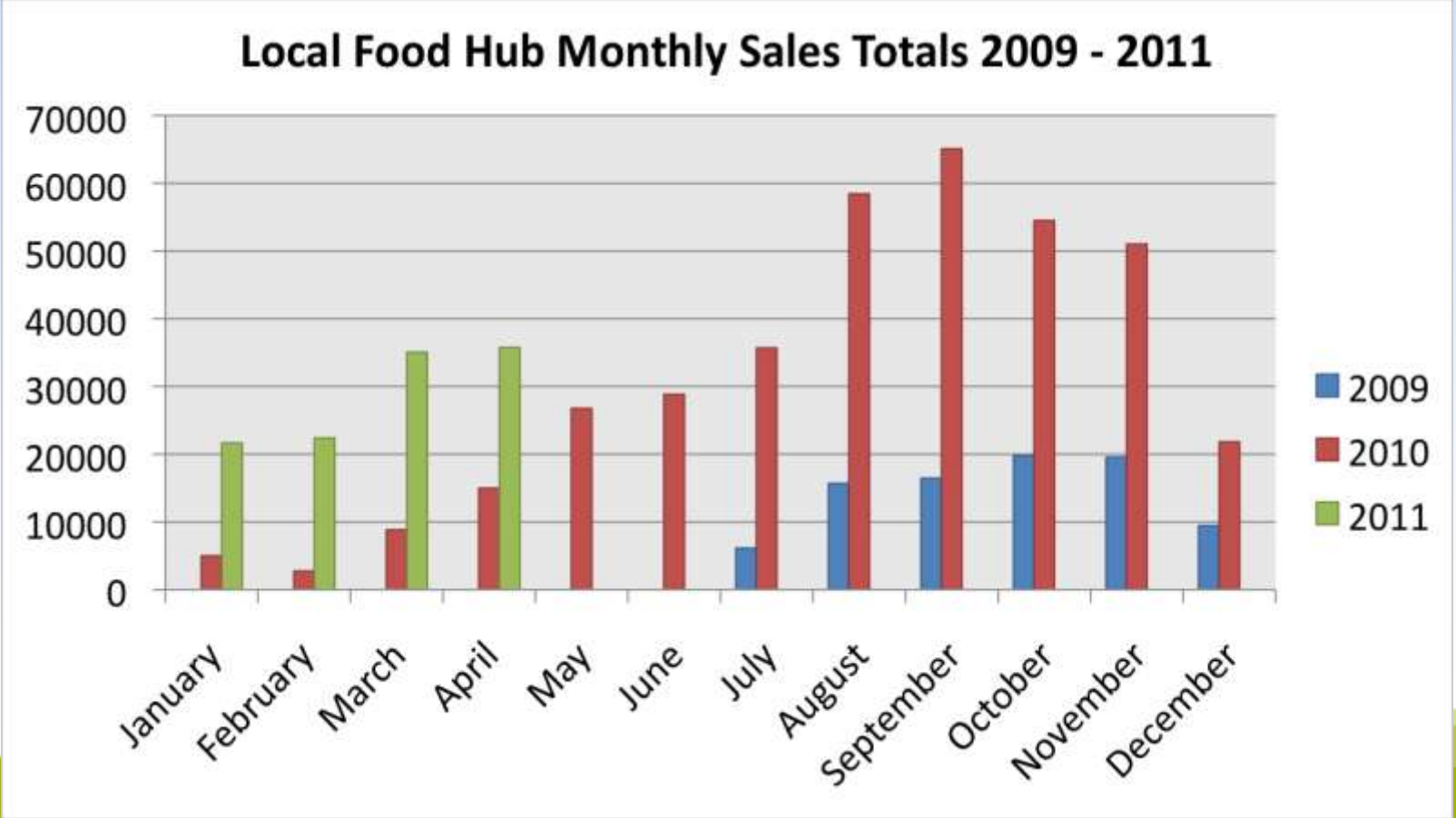
Market Rents	979,500
Foundation Grants	555,660
Dues & Donations	127,500
Government Grants	160,000
Misc	51,000
Total	1,873,660

Operations	453,300
Marketing	554,400
Business Development	370,400
Fund Raising	81,000
Administration	369,800
Misc.	44,760
Total	1,873,660

Non-profit Food Hubs: A Sustainable Business Model?

+ BUSINESS-BASED, GROWING FAST:

YEAR 1 LOCAL FOOD SALES = \$75,000
YEAR 2 LOCAL FOOD SALES= \$375,000
YEAR 3 LOCAL FOOD SALES =\$625,000 (projected)





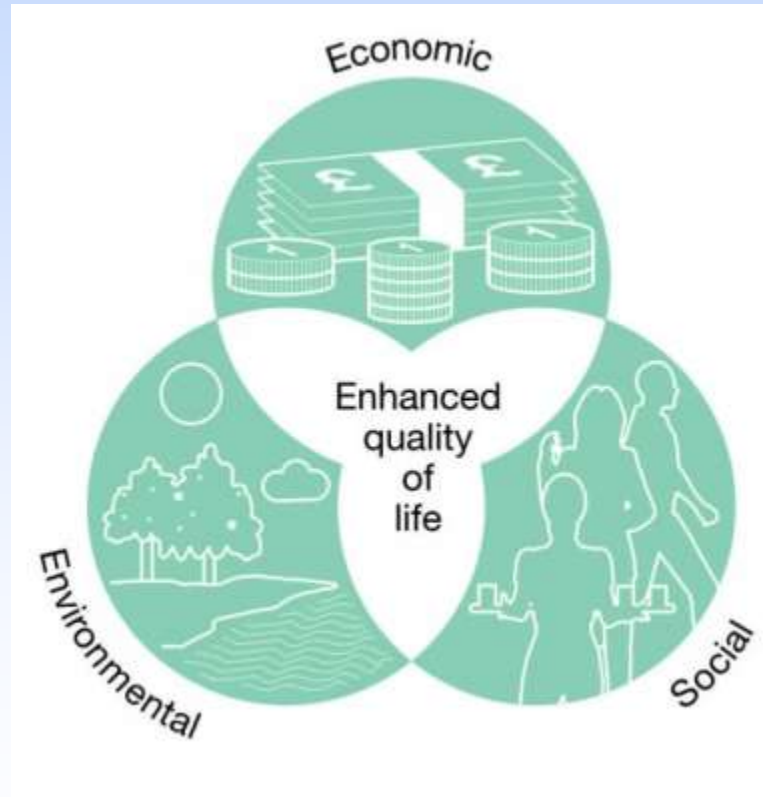
SUSTAINABLE NON-PROFIT - HOW IT WORKS:

- 80% of sale price goes to farmer for cost of food
- 20% goes towards paying for LFH services
- Distribution business break even is \$1.2M in sales
- Projected to reach this goal in 3-5 years
- All profits after that go towards supporting Farm Services and Educational programming
- Current annual fundraising needs:
\$500K, decreasing by 15-25% per year depending on sales

+ TRIPLE BOTTOM LINE RETURN:

Fair pricing and sales growth leads to viability of family owned and operated farm businesses.

Providing educational services and financial incentives encourages conventional farmers to adopt more sustainable growing practices and that is healthy for people and for land.

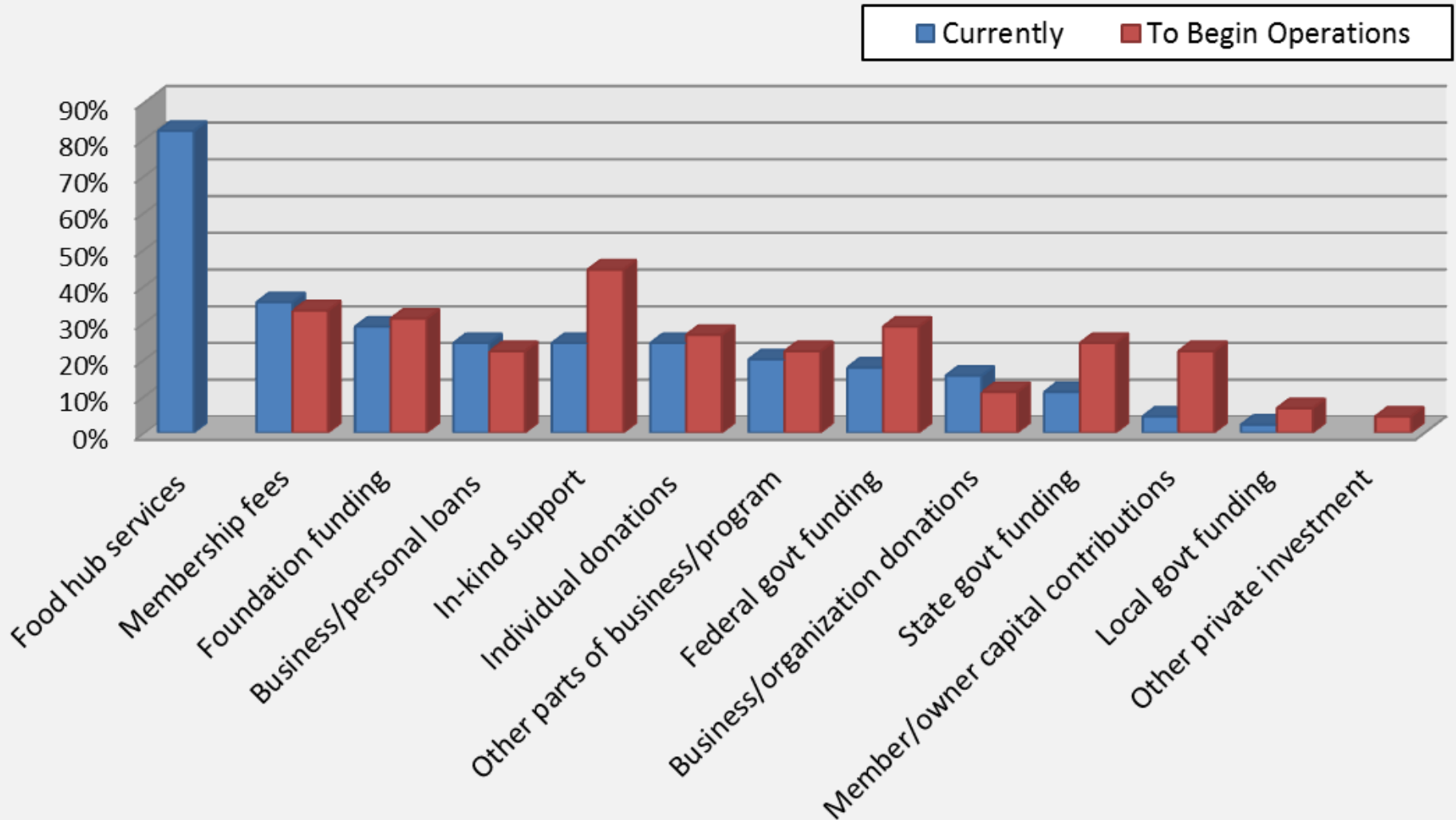


Regional distribution with a goal of food equity ensures healthy food is available to the community where they shop and dine.

Funding



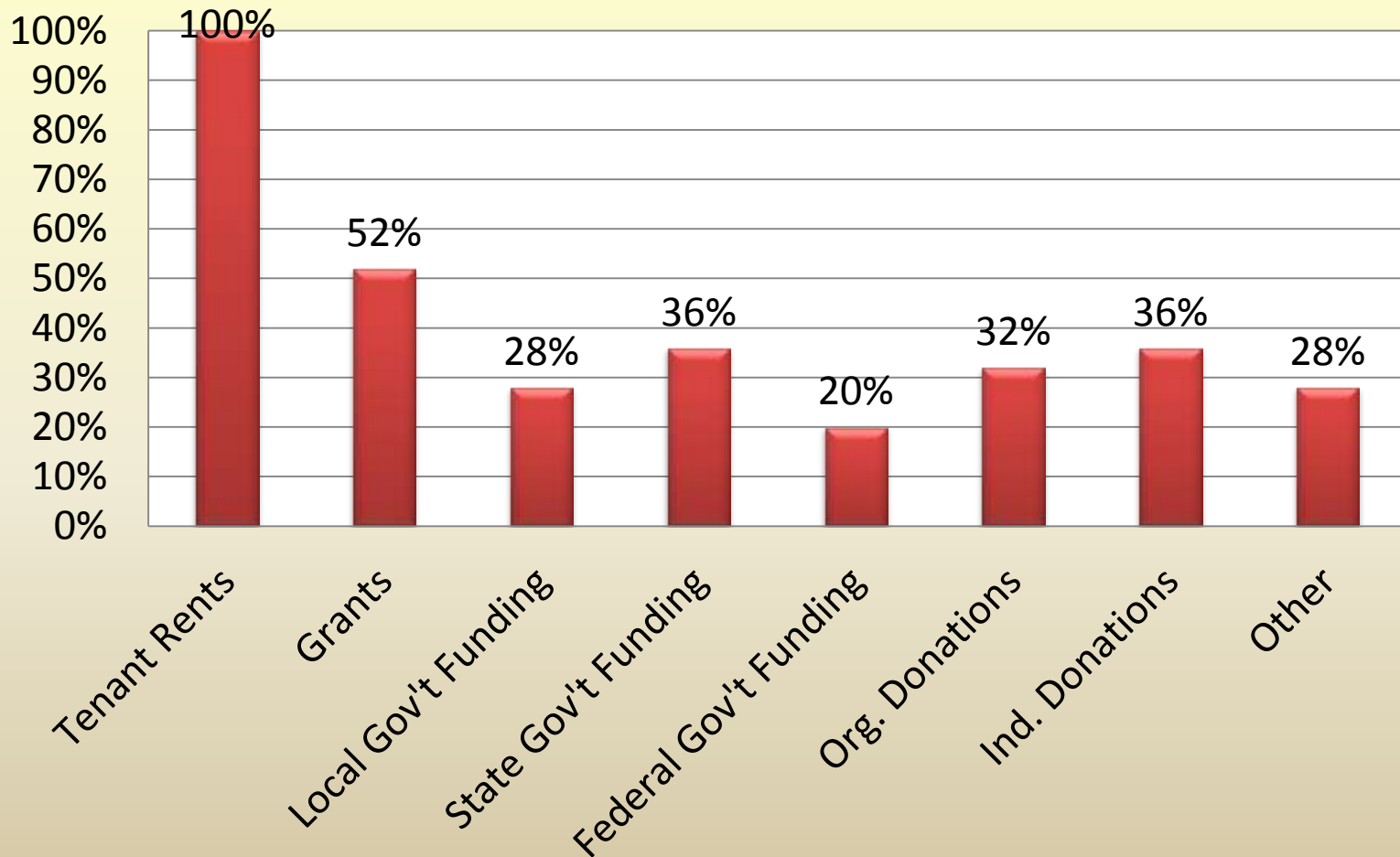
Food Hub Funding



- **31% of the food hubs received foundation support to begin operations**
- **29% of the food hubs currently have funding from foundations**



Public Market Funding Sources





Revenue Sources for Public Markets

TENANT RENTS

- Flat fee
- Percent sales

OTHER INCOME

- Merchandise
- Parking
- Gate Fees
- Special Events
- Service Fees (e.g. packaging)



Food Hub Survey Key Findings

– Economic Viability of Food Hubs –

- *From follow-up phone interviews with 20 regional food hubs on their economic viability:*
 - **10 Food Hubs identified themselves as economically viable, i.e., presently covering their operating costs (breaking even) or turning a profit**
 - **7 Food Hubs projected they will break even in the next 1 to 3 years**



What have we learned so far?

- **In most cases, the physical and “virtual” infrastructure is already in place, with an unmet demand for locally and regionally grown products**

- **What is needed?**
 - Start-up capital to renovate facilities for aggregation, storage, packing, light processing, and distribution

 - Working capital for business management systems to coordinate supply chain logistics (e.g., grower-buyer transactions, aggregation, distribution, and marketing)

 - Enterprise development training and technical assistance to increase grower capacity to meet wholesale buyer requirements (volume, quality, packaging, food safety, etc.)

Specific Needs:

Local Food Hub & Eastern Market

National Food Hub Collaboration: Next Steps

Innovative Pilots: 3 key leverage points

- Large Buyer
- Farm to School / Institution
- Rural / tribal underserved population

Community of Practice

- National & Regional convenings
- Peer to peer learning tools
- Clear access point for new stakeholders
- Accelerate innovation

National Food Hub Collaboration

Technical Assistance Network

- Leverage NGFN
- Both “strategic” and “tactical” support

Outreach & Communications

- Case studies
- Webinars
- Link to financial and knowledge resources
- www.FoodHub.info & ams.usda.gov/FoodHubs



www.FoodHub.info

Resources include

- A list of the food hubs we are aware of (will be updated periodically)
- A link for new food hubs to alert us to their presence
- Case studies, analyses and other informational resources
- Links to relevant Wallace Center National Good Food Network webinars
- Links to recent, important news and upcoming events
- USDA food hub funding opportunities



Resources to Support Food Systems Work

USDA's Food Hub Portal

<http://www.ams.usda.gov/FoodHubs>

USDA's research and resources on regional food hubs



USDA's "Know Your Farmer, Know Your Food" Website

www.usda.gov/knowyourfarmer

Note: Make sure to check out the Deputy Secretary's Memos





USDA Funding for Food Hubs: A few examples

- Rural Development
 - **Rural Business Enterprise Grant (RBEG)**

Coast Grown in San Luis Obispo received an \$88,000 RBEG grant in 2007 to form the Coast Grown Cooperative of 18 independent farms and ranches along California's Central Coast and to build the first Mobile Harvest Unit in California.
 - **Value-Added Producer Grant (VAPG)**

Grasshoppers Distribution of Louisville, KY received a VAPG of \$85,480 in 2006 to assist their work with small-scale family agriculture producers in Kentucky and southern Indiana.
- Agricultural Marketing Service
 - **Farmers Market Promotion Program (FMPP)**

The Oklahoma Food Cooperative received \$66,200 in 2007 to enhance its distribution system with better transportation and computerized recordkeeping equipment so it can expedite the delivery of produce using a web-based marketing and ordering system for regional producers.

National Food Hub Collaboration Contacts

- **Wallace Center at Winrock International**

John Fisk, Director
jfisk@winrock.org

- **USDA Agricultural Marketing Service**

Jim Barham, Agricultural Economist – Marketing Services Division
james.barham@ams.usda.gov

- **National Good Food Network**

contact@ngfn.org

- **National Association of Produce Market Managers**

Ben Vitale, President
bvitale@cnyrma.com

- **Project for Public Spaces**

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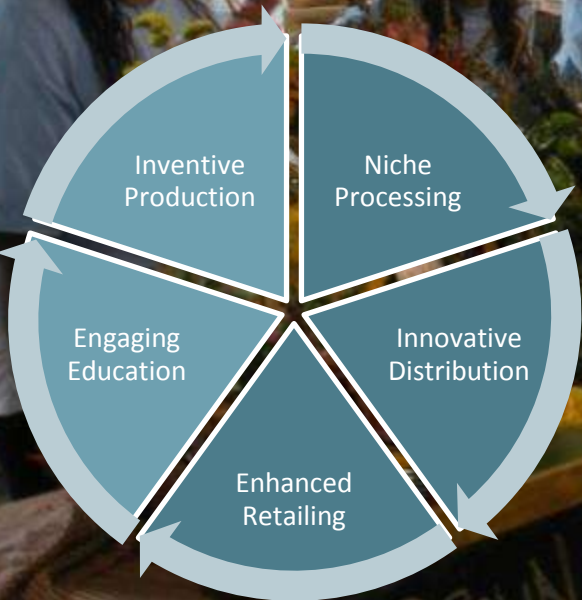
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