# LOCAL FOOD ACTION PLAN

## CITY OF COLUMBUS & FRANKLIN COUNTY, OHIO

# CURRENT CONDITIONS & VISION REPORT

DRAFT 9.16.15

THE CITY OF COLUMBUS
MICHAEL B. COLEMAN, MAYOR
COLUMBUS PUBLIC HEALTH

Local Matters

Franklin County
Where Government Works

# ABOUT THIS DOCUMENT

### *What is the Local Food Action Plan?*

The plan seeks to support a strong and resilient local food system in the City of Columbus and Franklin County by identifying opportunities in all areas of the food system. The food system includes: food access, production, processing, distribution, commercial buying and food waste recovery. It is facilitated by a Project Team including representatives from Columbus Public Health and Franklin County Economic Development and Planning in partnership with Local Matters. A Working Committee consisting of representatives from the community as well as various sectors of the food system will provide guidance and input during each project phase.

### *Planning Process*

The plan will be completed in three phases: Current Conditions and Visioning, Recommendations, and Plan Development. In each phase, the project team will compile the necessary documents and resources to present to the Working Committee for guidance. All documents and resources developed with Working Committee support will be made available for public comment. The project's final product will be a Local Food Action Plan with recommendations and an implementation strategy for strengthening the local food system.

### *Current Conditions & Vision Report*

This report presents the current conditions specific to each food system sector. It includes information gathered from published sources, surveys and stakeholder interviews. The report also initiates the vision-making process for the Working Committee by providing a draft vision for the food system. This report will be revised to reflect the expertise and feedback of the Working Committee.

### *Next Steps*

We will present the draft Current Conditions and Vision report to the Working Committee in late-September. Revisions will be completed based on their feedback and we will make the document available for comment by the wider community. The Current Conditions and Vision report will be used to inform the remainder of the planning process.

## INSIDE THIS DOCUMENT



BLANK PAGE

SECTION 1

# SUMMARY OF LOCAL FOOD-RELATED PLANS

*This section provides an overview and relevant recommendations from several local food-related plans completed throughout the nation, state, Franklin County and the Central Ohio region.*

## NATIONAL

**Multnomah Food Action Plan – 2010**

Multnomah County, OR (Portland area) completed the Multnomah Food Action Plan in December 2010 with input from a steering committee and four community workshops. The Multnomah County Office of Sustainability led the development of the plan and currently manages its implementation and outcomes. The plan lays out an aspirational vision of a thriving regional food system that would include healthy food production, equitable food access, low environmental impact, economic vitality, and living wages by the year 2025. To achieve this vision the plan houses 16 goals and strategies within four action pillars: (1) Local Food, (2) Healthy Eating, (3) Social Equity, and (4) Economic Vitality. Additionally, the plan is intended as a tool for collaboration and alignment around food system work and includes 65 community-wide actions for local government, businesses, nonprofits, faith communities, and learning institutions.

*Based on lessons learned from this plan and implementation, here are potential recommendations for the Columbus-Franklin County Local Food Action Plan:*

- Develop formalized mechanisms and processes for updating the plan and communicating with the public about implementation
- Create a local government position (e.g. food policy coordinator) who is housed within a local government department that can serve as a central hub for managing the plan’s outcomes and ongoing food system work
- Coordinate work in both the urban and rural food systems under a collective mission and set of goals with an eye toward connections between the two
- Ensure the existence of a larger, supportive advocacy group in the community that is working closer to the grassroots of the food system (e.g. food policy council)

**Seattle Food Action Plan – 2012**

In 2008 the Seattle City Council passed the Local Food Action Initiative, which aimed to improve the local and regional food system and led to the eventual creation of the Seattle Food Action Plan. The city of Seattle completed the Seattle Food Action Plan in 2012 with the stated goal of achieving a healthy food system through four overarching strategies: (1) Healthy Food For All, (2) Grow Local, (3) Strengthen the Local Economy, and (4) Prevent Food Waste. Listening sessions were convened throughout the city to gather input from citizens, stakeholders, and food system organizations. An inter-departmental team, comprised of representatives from a wide-range of city departments and led by the Office of Sustainability and Environment, shepherded the development of the plan and now manages its ongoing implementation.

*Potential recommendations for the Local Food Action Plan:*

- Create a formalized inter-departmental team to manage the ongoing implementation of the food plan and serve as a central hub for food system issues
- Include contributions from a variety of different local government departments for plan implementation through budget, people, and policy
- Develop specific strategies for healthy access points in food insecure areas, integrate with transportation networks
- Identify a wide-range of funding sources for implementation – grants, local government general funds, departmental funds, etc.

**Los Angeles Food System Snapshot – 2013**

The Los Angeles Food Policy Council managed and published the Los Angeles Food System Snapshot in partnership with public, private, and nonprofit partners. Geographically the plan covers the city of Los Angeles and the ten county regional foodshed, which constitutes a 200-mile radius with over 22 million people. The plan is intended as a snapshot of the health of the regional food system that establishes a set of 100 baseline indicators to assess future progress across nine food system topics (Regional Foodshed, Environmental Sustainability, Health, Retail Food Environment & Street Food, Food System Workers, Food Security, Urban Agriculture, Animal Welfare, and Food Waste). Additionally, the plan identifies ideal indicators that are not yet being tracked and proposes strategies to begin collecting this data. The plan is meant as a first step toward an annual assessment of the regional food system, headed by the Los Angeles Food Policy Council, that will update the indicators, track overall progress, and promote collective collaboration.

*Potential recommendations for the Local Food Action Plan:*

- Consider the health and role of the regional foodshed during the creation of goals and strategies
- Develop a yearly Food System Snapshot to update the plan's progress and critical baseline statistics
- Create a clear set of standards and a support system to empower major institutions to procure local, healthy, sustainable foods from small and mid-sized producers
- Create a framework for data collection that can be used to update progress on the plan in future years

**Pioneer Valley Food Security Plan – 2014**

The Pioneer Valley (MA) Planning Commission completed the Pioneer Valley Food Security Plan in 2014 with assistance from an advisory committee and input from surveys and interviews. The Pioneer Valley region is made up of three counties (Franklin, Hampshire, Hampden) and boasts some of the most fertile farmland in the nation. The plan lays out thirty specific strategies organized under two overarching goals: (1) No One Goes Hungry, and (2) We Grow Our Own Food. This plan is part of Plan For Progress, a broader regional planning effort that aims to address climate change, clean energy, environment, green infrastructure, housing, land use, transportation, workforce, and economic development in the 37 Pioneer Valley municipalities. The plan also includes six implementation projects intended as springboards to other strategies in the plan.

*Potential recommendations for the Local Food Action Plan:*

- Develop projects that can be immediately implemented and will build toward more significant projects and overall goals in the plan
- Identify local government partners (e.g. departments, offices, agencies) and community partners (e.g. businesses, nonprofits, faith entities) for all strategies and goals in the plan
- Create an implementation timeline and evaluation matrix for tracking progress on the plan and identify where it will be housed in local government
- Formalize an advisory committee that will continue meeting throughout the life of the plan and manage the plan's outcomes

**Planning for Santa Fe's Food Future – 2014**

The Santa Fe Food Policy Council, a joint city/county advisory entity, managed and completed Planning for Santa Fe's Food Future in late 2014 with input from a broad range of local stakeholders. The plan covers both the city and county of Santa Fe and was created with funding from both governments and other local foundations. The intention of the plan is to ensure safe, healthy, and affordable food supply for all residents in the city and county of Santa Fe. The plan identifies 17 goals organized under three broad categories: (1) Getting Food, (2) Growing Food, and (3) Learning About Food. Full implementation of the plan's recommendations is expected by 2017. Major focuses of the plan include local production of food, creation of local markets, food education, and addressing the challenges of food insecure populations.

*Potential recommendations for the Local Food Action Plan:*

- Focus on the specific challenges facing small and mid-sized producers (e.g. creation of local markets for locally produced food)
- Sketch out potential costs (e.g. human resources, fiscal, technological administrative) for the full implementation of the plan's goals
- Develop a shared value system between city and county governments that can guide creation of the plan, implementation, and future collaboration
- Regularly educate and update elected officials and local government staff on the intent, implementation, and future of the plan

## STATE

**Food for Every Child: The Need for Healthy Food Financing in Ohio - 2014**

Throughout the state of Ohio, many communities have limited or no access to supermarkets and other fresh food resources. In 2014, the Finance Fund partnered with the The Food Trust and formed the Ohio Healthy Food Financing Task Force to issue this plan. It describes under-served areas throughout the state to document the need for increased access to healthy and affordable food for families with children. The report describes an uneven distribution of supermarkets throughout the city of Columbus with lower-income neighborhoods having the least access to supermarkets which provide fresh produce.

*Key Highlights:*

- The report recommends establishing the Ohio Healthy Food Financing Fund (HFFF) to offer grants and flexible loans to supermarkets willing to locate in under-served communities.

**Ohio's Plan to Prevent and Reduce Chronic Disease: 2014-2018 – 2014**

The Ohio Department of Health (ODH) and the Ohio Chronic Disease Collaborative released this plan in 2014. Experts from public health, healthcare, business, education, transportation and planning, and state and local governments outlined methods to prevent chronic disease that focused on equal access to affordable, healthy foods and beverages and advocated for healthy schools and workplaces for all consumers.

*Recommendations:*
- Promote equal access to affordable and healthy foods
- Increase the number of small and large food stores offering healthy and affordable foods in neighborhoods where access to healthy food is low
- Provide healthy food options at work
- Enhance Farm to School (F2S) programs to increase access to local fresh fruits and vegetables in schools and universities
- Create a statewide food council to organize healthy food access efforts
- Increase the number of Ohio farmers' markets that accept nutrition assistance benefits
- Increase the percentage of census tracts that include at least one healthy food retail option
- Increase the number of public and private work-sites that provide healthy food and beverage choices

## REGIONAL

**The Central Ohio Local Food Assessment - 2010**

MORPC completed this assessment in 2010 reviewing agricultural, economic and occupational data at the 12 county regional scale. Conducted in the last six months of 2009, it provides a snapshot of existing local food system components in central Ohio. By interviewing stakeholders and analyzing state and regional-level data, the assessment identified potential assets and opportunities to connect them to one another. The assessment was conducted to guide future policies and investment and emphasized the value of local food to the regional consumers and economy.

*Recommendations:*
- Ensure fresh, safe, healthful, locally produced food is easily accessible to people of all income levels
- Strengthen the region's economy, create local jobs in the food production, processing and distribution industries and coordinate energy-efficient distribution
- Preserve valuable farmland by making agriculture more profitable
- Encourage policies allowing agriculture on vacant and underused land in cities and towns throughout the region
- Coordinate regional local-food efforts with those of the statewide Food Policy Advisory Council

**Fairfield Growing: An Agricultural Economic Development Plan - 2011**

Fairfield County completed Fairfield Growing: An Agricultural Economic Development Plan in 2011 to identify and encourage agriculture and its related industries to promote sustainable economic development growth that will improve the availability of local foods in the county. Fairfield County conducted monthly meetings with an advisory group and interviews with stakeholders to establish goals for the local food system and identify barriers to farmers, processors and retailers.

*Recommendations:*
- Farmland preservation through easement purchase programs or preservation programs
- Aggregation facility for smaller producers to increase distribution
- Return unused agriculture land to production
- Partner with neighboring counties to develop local food system strategy and planning

**Union County Agriculture Economic Development Strategy – 2011**

Union County completed an Agriculture Economic Development Strategy (AEDS) in 2011 aimed at protecting its agricultural lands and prime agricultural soils, by discouraging unplanned conversion of farmland to non-agricultural use. In order to be successful, AEDS implemented strategies centered on preserving farmland for agricultural use, increasing agriculture's economic stability and promoting agricultural related businesses through expansion and relocation within Union County.

*Recommendations:*
- Adopt transfer of development rights programs
- Increase marketing opportunities for producers
- Add corn and soybean processing facilities
- Promote local food use

**Greens to Greenbacks – 2012**

MORPC released Greens to Greenbacks in 2012 as a tool for leaders and advocates in the region and state. It describes the benefits of a strong local food system as well as recommendations for developing and promoting a local food system. The toolkit provides guidance on establishing and operating a local food council, which can be an important asset in developing and maintaining a strong local food system.

*Recommendations:*
- Commodity farmers can diversify their crop
- Local food "hubs" can serve meat and vegetable producers
- Expansion of food processing and distribution businesses
- Help consumer institutions support supply chains
- Access to nutritious, safe, local food for all consumers
- Ensuring that farming is profitable enough for good agricultural land to be used for production instead of development

# LOCAL

**Green Memo III - 2015**

In one of its key goals, the city of Columbus and the Columbus Green Community Plan called on residents, businesses, educational institutions, nonprofits, foundations, and city government to increase food security and equal access to local, healthy food when it released the Green Memo III in 2015. Utilizing the city's resources, this plan expects to add 10 acres of land dedicated entirely to food production while reducing the number of existing food deserts in Columbus by 10% within the next five years—both measurable objectives. Another key goal was waste reduction with one measurable objective being to divert 10% of all food and yard waste from the landfill within the next five years,

*Key recommendations:*
- Establish a clearinghouse and map to support Community Supported Agriculture (CSA) connections to consumers
- Plant an urban orchard with a plan for harvesting and storing produce
- Add local foods to city operated meal programs
- Expand/provide consumer networks in the faith community
- Promote alternative forms of agriculture (organics, hydroponics, aquaponics)
- Redevelop existing buildings and infrastructure to support indoor farming
- Support food hubs and start-up farmers
- Revise city policies to accommodate urban agriculture
- Establish a compost facility near Columbus that accepts food scraps
- Use community gardens as neighborhood composting sites
- Offer composting/food diversion programs to large-scale producers
- Help develop an additional anaerobic digester facility

**The Food District at Weinland Park – 2014**

In 2011, this project was originally envisioned as the Weinland Park Food District (WPFD) which followed recommendations of the Mid-Ohio Regional Planning Commission's (MORPC) 2010 Central Ohio Local Food Assessment and Plan. The assessment called for a need to increase food processing capacity within Central Ohio. MORPC, The Ohio State University, Columbus State Community College, Local Matters and others collaborated to develop a vision for the WPFD to have a multi-faceted facility to include a network of food hubs and a food processing center which would provide opportunities to local producers as well as jobs and training for the community and support affordable access to nutritious food. Despite interest from local businesses and neighbors, a lack of resource support for the project resulted in a revised proposal to the "Weinland Park Food Campus" by the Community Economic Development Corporation of Ohio (CEDCO) in 2015. The next steps involve developing a comprehensive business plan for the facility and campus to secure financial support and partnerships.

*Key Highlights:*
- Create a social enterprise model with revenue generating business to fund the Godman Guild, CEDCO and other food-related services and businesses (cold storage, R&D services, innovation, sensory lab)
- Include high pressure pasteurization (HPP)
- Establish food businesses and commercial kitchen space
- Include offices, conference rooms and community spaces

**South Columbus Fresh Food Campus – 2015**

The Parsons Avenue Merchants Association (PAMA) completed the "South Columbus Food Incubator Feasibility Study" for the south side of Columbus with support by Your Management Team, Inc. (YMT) in June 2015. PAMA hired YMT with grant money approved by Columbus City Council. The study involved interviewing residents, local entrepreneurs and other stakeholders to explore the needs of the community. Additionally, YMT researched past and current work in the community and other food incubators throughout the country. The key recommendation of the study was the proposal for a South Columbus Fresh Food Campus. In July 2015, the Neighborhood Design Center (NDC) provided conceptual designs for three sites on Parsons Avenue to develop the campus proposal.

*Next Steps:*
- Secure funding and complete a business plan

**Mapping the Food Environment – 2013**

In 2013, The Ohio State University (OSU) Food Mapping Team launched Mapping the Food Environment. Funded by OSU's Food Innovation Center, researchers from multiple colleges an schools within OSU sought to describe the local food system, including geographic disparities in hunger and food security at the local and individual level. The initial phase of the project involved administering comprehensive surveys to residents in seven neighborhoods. With the survey complete, the OSU Food Mapping Team is currently conducting data analysis of the survey results.

*Next Steps:*
- Develop a detailed spatial understanding of the food environment
- Compare food environments of diverse populations living in different areas and comprised of different sociodemographic characteristics

- Provide community partners and policymakers with reliable, representative data pertaining to food access, food patterns and behaviors, health conditions related to diet, food security, and neighborhood characteristics

**The Franklin County Food Policy Audit - 2012**

MORPC in partnership with the Franklin County Local Food Council (FCLFC) conducted the Franklin County Food Policy Audit in 2012. The audit evaluated the county's agriculture and food related policies and programs in four categories: promoting local food, sustainability, and community food security; strengthening zoning and land use; public health and food access. Franklin County scored 52.3, 70.4, 40.0 and 44.4 percent in each category, respectively. Because this audit is the first of its kind, there is no past data upon which to base a comparison. It does however, establish a baseline for future assessments. MORPC and FCLFC reviewed potential barriers and opportunities for continued operation and development of food-related programs and initiatives while conducting the audit.

*Recommendations:*
- Leverage public funding to increase availability of healthy, local food in schools and public institutions
- Incentives to retailers providing fresh food in low income communities
- Financing and training for farmers and urban agriculturalists
- Transportation options between low-income neighborhoods and retailers providing healthy, local food

BLANK PAGE

SECTION 2

# SUMMARY OF PROGRAMS & FUNDING

*We reviewed a representative sample of programs and funding at the national, state and local level which could support and facilitate any future work to follow the recommendations of the Local Food Action Plan.*

## *Food Access*

A number of supplemental food programs are offered at the federal, state and local level to help low-income families and individuals access food:

- Supplemental Nutrition Assistance Program
- National School Lunch Program
- School Breakfast Program
- Child and Adult Care Food Program
- Summer Food Service Program
- Women, Infants and Children (WIC) Program
- Senior Farmers' Market
- The Emergency Food Assistance Program
- Ohio Food Program
- Ohio Agricultural Clearance Program Local
- United Way of Central Ohio (UWCO)
- Fresh Foods Here
- Veggie SNAPS

Most supplemental food programs serve those who earn a maximum of 130%-200% of the poverty level. In 2015, 100% of the poverty level for a family of 4 is $24,500 and 200% is defined as $48,500. However, the Self-Sufficiency Standard for Ohio, is greater than 200% of the federal poverty level. A report prepared for the Ohio Association of Community Action Agencies, calculated the amount of income needed to meet each basic need at a minimally adequate level, without public or private assistance. In Franklin County a family of four consisting of 2 adults, 1 preschooler and 1 school-age child would require an annual income of $57,877 to be self-sufficient.

## *Nutrition Education*

Programs and funding at the national, state and local levels are available to support nutrition education for consumers. Nutrition education emphasizes cost-effective skills for nutritious meals, cooking classes and nutrition education in classrooms. Related programs and funding include but are not limited to:

- Expanded Food and Nutrition Education Program (EFNEP)
- Supplemental Nutrition Assistance Program Education (SNAP-Ed)
- Voices for Healthy Kids
- Action for Healthy Kids 2015-2016 School Grants
- Fruit Tree 101
- Ohio 4-H Youth Development
- Cooking Caravan
- Local Matters
- Round the Kitchen Table
- Moms 2 Be

## *Producers and Food Production*

Programs designed to support producers and food production are also available at the national, state and local level:

- Ohio 4-H Youth Development
- Columbus Recreation and Parks
- Franklinton Gardens
- Highland Youth Garden
- Urban Farms of Central Ohio
- Project Aquastar
- Ohio Master Urban Farmer Program
- Specialty Crop Block Grant Program (SCBGP)
- Farmers Market Promotion Program (FMPP)
- Local Food Promotion Program (LFPP)
- Ohio Proud
- Value Added Producer Grant (VAPG)
- Emergency Assistance for Livestock, Honeybees and Farm-Raised Fish (ELAP)
- Dairy Production Donation Program
- Clean Ohio Local Agricultural Easement Purchase Program (LAEPP)
- Agricultural Easement Donation Program
- Ohio Agricultural Clearance Program (OACP)
- Farm Storage Facility Loan Program
- Franklin County Green Corps Program

SECTION 3

# SECTOR OVERVIEWS

*Food systems consist of different sectors. Properly observing and analyzing a food system requires a thorough review of each sector of that food system and an understanding of its current characteristics, strengths and barriers. This section looks at the current conditions in the City of Columbus - Franklin County food system including: consumers, producers, processors and distributors, commercial buyers and food waste recovery.*

## CONSUMERS

*The food system exists to provide food to consumers. The ways in which the residents of the City of Columbus and Franklin County obtain food are varied and complex. This section seeks to describe local consumer food preferences as well as how and where they obtain food.*

### - Background -

The type of foods and beverages that consumers have access to has an impact on their health, contributing to the development of diet-related chronic disease conditions, including but not limited to overweight/obesity, diabetes and hypertension. These chronic disease conditions impact life expectancy and in 2013 the Greater Columbus Infant Mortality Task Force specifically identified increasing equitable access to healthy food as a strategy for reducing infant mortality. Based on a 2014 analysis by Columbus Public Health (CPH), 23.9% of Franklin County residents have to travel 2.5 times further to a grocery store than to a fast food restaurant. The table below describes chronic disease, life expectancy and the availability of grocery stores in 4 Columbus neighborhoods:

| | Poverty Rate | Food Imbalance | Life Expectancy | Over-weight or Obesity | Infant Mortality |
|---|---|---|---|---|---|
| Franklin County | 17.4% | 23.9% | 77.5 | 59.1% | 9.6 |
| Near East (43203, 43205) | 45.4% | 39.5% | 69.9 | 74.1% | 11.4 |
| South (43206, 43207) | 23.7% | 29.6% | 72.2 | 65.4% | 13.1 |
| West (43204, 43222, 43223, 43228) | 25.9% | 28.1% | 73.5 | 58.3% | 10.0 |

| | | | | | |
|---|---|---|---|---|---|
| North (43229, 43231) | 22.6% | 20.4% | 77.8 | 61.6% | 9.4 |

**All Analysis completed by the Office of Epidemiology at Columbus Public Health**
***Poverty Rate:*** US Census Bureau, 2007-2011 American Community Survey 5-Year Estimates. Poverty Status in the Past 12 Months by Sex by Age (Table B17001).
***Food Imbalance:*** 2011 Food Balance Ratio Analysis, Columbus, Ohio. Describes the percentage of a population who must travel at least 2.5 times further to reach a full service grocery store than to reach a fast food outlet.
***Life Expectancy:*** Ohio Department of Health Vital Statistics 2007-2011, Analysis by Office of Epidemiology, Columbus Public Health.
***Overweight or Obesity:*** 2005 Franklin County Health Risk Assessment. Prevalence is reported for those 18 years and older, unless otherwise noted.
***Infant Mortality:*** The number of infant deaths per 1,000 live births. Ohio Department of Health Vital Statistics, 2009-2013.

The US bureau of Labor Statistics estimates that consumers in the Midwest Region, including Ohio, spent approximately $6,602 annually on food in 2013, including $3,977 for food at home and $2,625 for food not at home.

According to the USDA's Food Environment Atlas in 2012, there were 263 grocery stores, 17 supercenters/club stores, 448 convenience stores and 72 specialized food stores. In 2012, 896 food retailers in Franklin County were authorized to accept SNAP benefits and 197 accepted WIC. As of 2013, there were 33 Farmers Markets in Franklin County, representing a 200% increase from 2009 making 0.03 farmers markets available per 1,000 people. In 2013, 15 (45.45%) of Farmer's Markets report accepting WIC and 17 (52%) accepted SNAP. In 2014, Veggie SNAPS, a County and City supported initiative, provided an additional $5,000 to 633 SNAP EBT users to increase purchasing power at six Local Farmer's Markets. The program expanded to nine markets in 2015 with the support of a USDA Food Insecurity Nutrition Incentive (FINI) grant in conjunction with Wholesome Wave.

As of 2010, the USDA described 275,641 residents (23.69%) as having low access to grocery stores. Of those with residents with low access, 72,902 were defined as low income. In Franklin County, the USDA identified 39 census tracts as both low income and having low access to grocery stores, including the Near East, South Side, West and Northland neighborhoods described earlier in this section.

## - Survey Results -

*A consumer survey was distributed to residents of Columbus and Franklin County in May of 2015. By the close of the survey, 530 individuals responded.*

***Demographics:*** The majority of respondents were female (81%), white/ Caucasian (83%), spoke English as a primary language (99%) and listed United States as their place of birth (93%). Less than 10% of respondents answered yes to the question “In the last 12 months, were you ever hungry but didn’t eat because there wasn’t enough money for food?”. Only 3.6% of respondents indicated that they use SNAP benefits to purchase food and less than 1% of respondents reported using WIC benefits to purchase food. Over 50 zip codes in Franklin County had at least one respondent.

***Food access:*** Out of all respondents who answered (530), most pay for food with cash (72%) and credit card (55%), are within 0-15 minutes (78%) of where they purchase most of their food, and primarily use their own car (91%) for getting to their food purchase locations.

Out of the 518 respondents who answered, 36% indicated that there are currently enough options within their neighborhood for purchasing food, while 24% feel there is a need for a farmer’s market in their neighborhood.

***Purchasing food:*** More than 70% indicated that they purchase most of their food at a supermarket and only 14% purchase at a premium market. More than 80% rated food quality where they buy food as good or excellent. 91% of respondents travel to the grocery store by car. 78% of respondent’s travel time is 15 minutes or less.

***Factors in purchasing food:*** Locally grown was either an important or very important factor in their decisions on what food to buy for 517 respondents (97.5%) out of the 530 who answered. As not an important consideration, 148 respondents (28%) rated organically grown and 91 respondents (17%) rated food grown without pesticides.

***Purchasing local:*** Food that is produced or made locally in Central Ohio (Franklin County or the surrounding counties) was the type of food purchased by 420 respondents (81%) of the 515 who answered. Sixty-five respondents (13%) reported that they did not know if their food was produced locally while 30 respondents (6%) do not purchase locally produced or made food.

***Reasons for purchasing local:*** The most important reason for purchasing locally grown or raised food because it supports the local economy was the answer for 172 respondents (41.6%) out of the 413 who answered. Sixty-nine respondents (17%) indicated they purchase because of nutritional value, 68 (16%) respondents because it is better for the environment and 58 (14%) because it tastes better.

***Spending:*** 323 respondents (80%) out of the 401 who answered spend less than half their food budget on locally produced or made foods.

227 respondents (54%) out of the 420 who answered indicated a willingness to spend more to purchase local fruits and vegetables; 182 respondents (43%) would pay the same. In terms of how much more, 111 respondents (49%) out of the 225 who answered would pay 6-10% more while some (18.2%) are willing to pay 11-20% more and a small amount (<10%) would pay more than 20%.

Results for purchasing locally produced meat, dairy and eggs were largely similar—just over half of the number of respondents who answered would pay more and are willing to pay 6-10% more.

***Purchase location:*** 206 respondents (49.8%) out of the 413 who answered indicated purchasing local produce at a farmers market, 80 respondents (19%) purchase at supermarkets and 59 respondents purchase (14%) at premium retail stores. Other sources include large retail stores, small grocery stores, and directly from the farmer. No respondents reported purchasing from convenience stores or partial markets.

Almost half (46%) of all respondents who answered (507), indicated that they would prefer to buy local food at a supermarket. Only 22% indicated that they would prefer a farmers market, 9% from a small grocery store and others indicated a preference to buy direct from a farmer, premium store, convenience store, international store or partial market.

***Growing food:*** Just over half (54%) of the respondents who answered (518) stated they grow their own food and just over half (52%) of those who answered (235) are interested in growing their own food; 33% are not interested.

***The 95 respondents who reported not buying locally produced food were prompted to answer additional questions about local food with results provided below:***

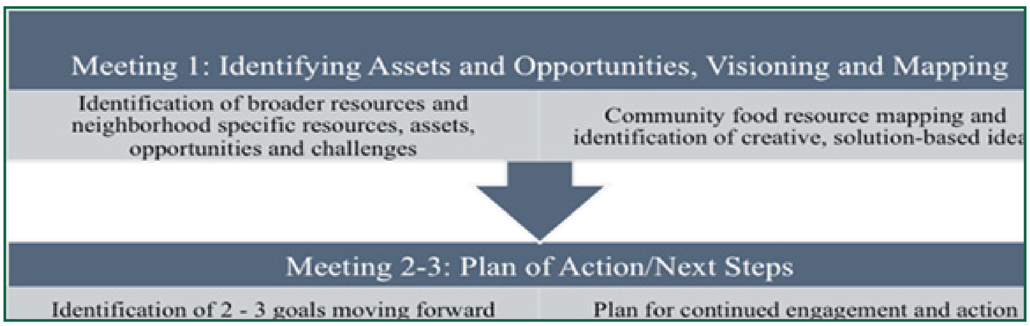
***Purchasing local barriers:*** Thirty-one respondents (33%) reported not knowing where to buy as the primary barrier to buying locally produced or made food. Nineteen respondents (20%) reported availability and 17 respondents (18%) reported cost as reasons for not buying locally produced or made food.

***Purchasing local preference:*** Respondents who do not currently buy local food show the greatest interest in purchasing local fruits and veggies followed by dairy and meat. They were least interested in purchasing local nuts, beans, soy, rice and grains.

## - Neighborhood Planning Results –

*Local Matters facilitated 2-3 meetings in seven unique Columbus neighborhoods to identify and explore neighborhood-specific solutions for improving access to healthy food and nutrition education. The meetings were facilitated in Clintonville, Linden, Near East Side, Near South Side, Northland, Weinland Park and the West Side of Columbus. Group sizes varied from 15 to 40, including residents and representatives of community organizations with an interest in improving food access and education and production.*

**Meeting Process:**




**Participation:**

- Organizations and individuals previously engaged in neighborhood food efforts
- Residents, business owners and community leaders in the community

**Neighborhood Goals**

*The following is a list of the top 1-3 priorities from each neighborhood*

***Clintonville:***

- Goal 1: Increase Food Production and Access
- Goal 2: Host community events that allow people to share knowledge and share food
- Goal 3: Improve the Local Food Economy

***Linden***

- Goal 1: Create a neighborhood food center – farmers' market, education, communication and food delivery
- Goal 2: More restaurants

***Near East Side:***

- Goal 1: Increase Community Food Education and Awareness
- Goal 2: Improve the Quality of Food Available at Corner Stores

***Near South Side:***

- Goal 1: Increase community education through workshops
- Goal 2: Establish a community garden network to increase the number of community gardens and to provide gardening and composting education
- Goal 3: Improve Access to Quality Food

***Northland:***

- Goal 1: Establish an international farmers' market.
- Goal 2: Create community gardens throughout the Northland area with space for anyone who wants to garden.
- Goal 3: Utilize or tear down abandoned businesses/old chain stores and restaurants and transform the land into green space

***Weinland Park:***

- Goal 1: Local Economic Empowerment Initiatives that Improve Food Access

***West Side:***

- Goal 1: Explore bringing a large-scale community grocer, co-op, or food hub with opportunities for education and business incubation to Franklinton and Hilltop.
- Goal 2: Develop a healthy food communication network for the West Side, which includes information and resources about healthy food access, education, and production.

## - Stakeholder Interviews -

*The project team conducted interviews with identified stakeholders including non-profit organizations, public agencies and private businesses. Interview feedback touched on a range of issues and opportunities related to consumers and their relationship to the local food system with three overall themes: demand, education and access.*

***Demand:*** Stakeholder interviews indicate increased and steady demand from consumers for local produce and food. This continues to increase as businesses strive to increase consumer awareness of local produce and food with food sourced from local and regional producers. Finally, food pantries see a continual interest in produce deliveries, which are frequently aggregations of local producers' surplus.

***Education:*** A few stakeholders mention that consumers remain unaware of opportunities available to purchase local produce. They also report a disconnect from the value of local produce and food in their communities. Additionally, consumers are typically unaware of local produce's seasonal availability and its impact on them and the places they shop.

***Access:*** Stakeholder interviews indicate that there are areas within Central Ohio where accessibility to food and fresh local produce is low in both proximity and awareness. Even with accessibility to retail stores, particularly grocery stores, cost often remains too high for many consumers.

# PRODUCERS

*The producer sector is comprised of farmers, ranchers and all types of growers that we rely on to grow our food. Below is published data, survey results and stakeholder interview feedback pertinent to the sector's current conditions in Franklin County.*

## - Background -

***Farming in Franklin County:*** The market value of all agricultural products sold in Franklin County was $48,228,000 in 2012, based on the 2012 Census of Agriculture. While this is an increase of $4,543,000 from 2007, Franklin County ranks 63 out of 88 in the State. Crops, including nursery and greenhouse, made up 96.18% of this value while livestock, poultry and their products was 3.82%. At $687,000, fruits, vegetables, and tree nuts made up 1.4%. From 2007 to 2012, total numbers of farms decreased from 429 to 388.

Out of the 388 farms, below are the number of farms involved in the following forms of production:

- Soybeans: 117 farms
- Corn: 101
- Forage (grass and legume plants): 104
- Wheat: 35
- Vegetables: 30
- Orchards: 16
- Cattle/calves inventory: 48
- Cattle/calves sales: 43
- Layers inventory (eggs): 42
- Sheep/lamb inventory: 20
- Hog/pigs inventory: 16
- Hog/pigs sales: 12

***Farm Operators in Franklin County:*** The 2012 Census of Agriculture reported that 308 principal operators (79.38%) were male and 80 principal operators (20.62%) were female. The average age for principal operators was 57.9 years of age. The census also collected racial demographic data for farms recording up to three operators per farm. There were 571 operators reported as white, eight who identified themselves as Asian and five as more than one race. Three operators were of Spanish, Hispanic or Latino origin.

Based on data provided by the Economic Modeling Specialists International (EMSI), Franklin County houses 18% of all producer sector jobs in Central Ohio (Madison, Pickaway, Fairfield, Licking, Delaware, Union and Franklin County). Based on the 2012 Census of Agriculture, Franklin County has 388 farm operations, which represents 6.15% of all farm operations in Central Ohio. Furthermore, Franklin County's total acreage operated by farms is 62,017, which is only 4.33% of all farm acreage in operation within Central Ohio.

Historically, wages have been fairly unstable. Average wages for producers in Franklin County show a degree of variability when observed from 2001-2014. Beginning with a $3,663 drop in annual average wages from 2001-2003, there is a $13,610 increase from 2003-2007. This followed with a $5,820 drop in 2008. From 2009-2011, wages increased by $4,232 and then dropped $3,136 the following year. While average wages for producers in Central Ohio mirror some of this variability, the State of Ohio remains relatively stable. Average wages in Franklin County were $22,018 in 2001 and $28,941 by 2014.

## - Survey Results -

***Respondent Characteristics:*** Nineteen (59%) out of the 32 who completed the survey indicated that they have been in business for 21 years or more while 11 respondents (34%) have been in business for five years or less.

In terms of experience, 17 respondents (53%) have been farming for 21 years or more. Fourteen respondents (43.75%) farm less than 50 acres while 16 respondents (50%) farm over 100 acres--six of those 500 acres or larger.

***Succession plans:*** Only four respondents (13%) out of 31 have a written plan in place while 18 (56%) do not. Two indicate interest in selling the land. Seven respondents (22%) want their farm business to continue but do not have a written plan.

***Farm locations:*** Nineteen respondents (76%) out of 25 farm solely within Franklin County while 6 respondents (24%) indicated that they farm in Central Ohio counties other than Franklin County.

***Farm products:*** A significant number farm corn (53%) while others farm soybeans (50%), wheat (40.63%), fruits (44%) and vegetables (47%). Four respondents (12.5%) raise hogs and five (15.6%) raise cows and calves. No respondents indicated producing dairy, turkey, or broilers and only one respondent raises chickens for egg production.

***Farm methods:*** Twenty respondents (62.5%) indicate using conventional farming methods while 17 (53%) used organic non-certified methods. Four respondents (12.5%) use biodynamic methods while six respondents (18.8%) use free range/pastured or organic (certified).

***Demand:*** Twenty-three out of 32 respondents (71.9%) report they meet demand most or all of the time. Eight (25%) meet demand some of the time while only one respondent indicated they never produce enough to meet the demand.

***Sales method:*** Twenty respondents (67%) sell directly to consumers, 14 (47%) through wholesalers, distributors or grain elevators, 12 (40%) direct to restaurant or retail, and eight (26.7%) sold to food hubs, auctions, co-ops or online. None currently sell at wholesale markets.

***Sales method (primary):*** Nineteen respondents (65.5%) out of 29 who answered reported selling directly to consumers as their primary method. Eight (27.59%) primarily sold through wholesalers, distributors or grain elevators while one sold directly to a restaurant or retail.

***Preferred sales method:*** Eighteen respondents (60%) out of 30 would like to sell direct to consumers, 14 (46.7%) through wholesalers, distributors or grain elevators, 13 (43.3%) direct to restaurants and 11 (36.7%) would selling as part of co-ops or food hubs.

***Preferred sales method (primary):*** Fifteen respondents (48.4%) out of 31 would like selling direct to consumers to be the primary method. Nine (29%) would primarily sell through wholesalers, distributors or grain elevators, four (12.9%) direct to restaurants and three (9.7%) as part of a co-op. None selected selling to a wholesale market, food hub, and auction or online as a preferred primary method.

***Logistics:*** Thirteen (43.3%) out of the 30 respondents who answered reported that they sell their products within 10 miles of their establishment. Nine respondents (30%) travel 11-20 miles and eight (26.7%) within 21-50 miles. No respondents traveled more than 50 miles away.

***Distribution:*** Sixteen (55.2%) respondents out of 29 sell their products seasonally while seven (24%) sell weekly and only five (17%) sell daily.

Twenty-four (80%) out of 30 respondents sell 100% of their product to buyers within Central Ohio and four respondents (13.3%) sell 50%-75% of product in Central Ohio.

***Selling local barriers:*** Of the 31 respondents who answered, the following were indicated as moderate, significant or major barriers to selling more of their product to buyers in Central Ohio:

- Regulations (nine or 29%)
- Prices not good enough (eight or 26%)
- Processing facilities not being available (six or 19%)

The following were not concerns to selling to local buyers in Central Ohio:

- Not knowing where to sell (25 or 81%)
- Importance of selling locally (23 or 74%)
- Not knowing what customers want to buy (25 or 81%)
- Availability of processing facilities (20 or 65%)

***Assistance in selling local:*** Of the 29 respondents who answered, the following were indicated as moderately, significantly or very helpful resources in assisting them to sell to local buyers:

- Participating in a locally based marketing brand (18 or 62%)
- Establishing contacts/building relationships with local retailers and customers (17 or 59%)
- Resources for assessing market demand (17 or 59%)

The following were not helpful or only slightly helpful:

- Education about marketing their product (16 or 55%)
- Being part of a local producer co-op (13 or 45%)

***Barriers to expanding current farm operations:*** Of the 31 respondents who answered, the following were indicated as moderate, significant or major barriers:

- Labor (21 or 68%)
- Regulations (21 or 68%)
- Land (15 or 48%)

The following were not concerns to farm expansion:

- Insurance (22 or 71%)
- Transportation (19 or 61%)
- Buyers requirements (18 or 58%)
- Access to Loans (18 or 58%)
- Equipment (18 or 58%)

***Primary barrier to expanding current farm operations:*** Eight (27.6%) of the 29 respondents who answered reported labor, seven (24%) land and five (17%) regulations.

***Interest in growing or raising new crops or animals:*** Nine (30%) of the 30 respondents who answered indicated the most interest in vegetables, nine (30%) in greenhouse/nursery, six (20%) in fruit and 12 (40%) were not interested in growing or raising new crops or animals. No respondents indicated they were interested in dairy or cattle.

## - Stakeholder Interviews -

*Feedback related to producers and their relationship to the local food system surrounded three themes: distribution, support and durability.*

***Distribution:*** Distribution methods identified in stakeholder interviews were similar to those identified in the survey results. For example, local producers identified limitations of working with bulk distributors. Typically bulk distributors have the advantage in setting a price and the lack of distributor options can be unfavorable to local producers. There are no other places to sell a high yield on a single crop. Additionally, competition with charitable organizations was reported as barrier to selling in some areas.

While many federal regulations do not apply to small scale local producers, grocery stores and other large scale buyers may require costly third-party certifications to ensure Good Agricultural Practices (GAP) for farms. Moreover, different buyers may require additional certifications, which can increase costs and requirements for producers and reduce access to markets. As mentioned by an interviewed distributor and an interviewed commercial buyer, local producers do not often produce enough specialty crops or cannot guarantee across the board quality for the produce to make commercial buyers comfortable enough to work with them. Finally, a stakeholder reported that selling to co-ops may force local producers to their price with the additional possibility of selling only a portion of their yield. An additional challenge is the variability of farmers' markets sales which may result in unsold product. The Mid-Ohio Foodbank does provide some help for surplus problems by purchasing it from local producers at a discounted rate. Producers who donate their crops to the food bank can receive tax breaks.

***Support:*** Stakeholders reported that producers and those working with the agriculture industry see a continued need for funding for significant upfront costs. Whether an urban farmer seeking licensing or certification or a large scale farmer that needs a loan to pay for equipment and land, funding is needed to support the start-up costs for producers. Particular to central Ohio, there is a lack of apiaries—as pollinators, bees are crucial to the local food system.

Stakeholders identified a need to train and prepare new farmers to replace those retiring from or leaving the farming industry. More specifically, a stakeholder described a need to raise up and train urban farmers who predominantly grow specialty crops. Another stakeholder reported a need to encourage and support commodity crop producers to provide land for specialty crop production.

Finally, while consumers and commercial buyers express a growing interest in buying local produce, one stakeholder believes that local producers remain unaware of how to effectively market and distribute their product to purchasers. A commercial buyer who currently sells local produce reported that they are aware of other local producers that produce a quality product but do not know how to properly market, package and deliver to a distributor or a commercial buyer. Producers are experts at producing their product but they need help with effectively getting their product to the market.

***Durability:*** Many interviewed stakeholders expressed concern over the reliability of supply from local producers to the local food system. Part of this stems from the lack of specialty crop production and the lack of year round production. One interviewed producer stated that most large farmers produce commodity crops such as corn, soybeans and wheat and are not interested in specialty crop farming. Other stakeholders highlighted that it is hard to compete with the supply and prices of specialty crops coming from California. The high risk associated with growing specialty crops and lack of government incentives compared to commodity crops were also identified as barriers to increasing local production. Though urban farming provides the potential of producing specialty crops, the value of urban land is often too high for it to remain under agriculture production.

Extension of the growing season, through hoop houses, high tunnels, hydroponics and other techniques will be required to consistently provide local produce and strengthen the local food system. Growing year round requires funding and training to support infrastructure. Finally, stakeholders expressed a need for local resources to process surplus product to extend shelf life and reduce waste.

The availability of labor and workforce to replace the aging population of farmers is also crucial. Consistent with the findings of the survey, one interviewed producer reported that few local farmers have succession plans and the younger generation, children of farmers, do not have an interest in farming. Consistent with the economic data on average wages for the producer sector, the current wages are too unstable to attract workers, particularly knowledgeable or skilled workers. Additionally, the value of farmland continues to increase in areas near cities where utilities extend, making it more profitable to sell the land for development. With schools locating in what used to be largely rural areas, real estate taxes increase on surrounding farmland, making it more difficult for farmers to generate a profit.

# PROCESSORS/DISTRIBUTORS

*This sector includes processors who convert agricultural products into various types of consumer food products and animal feed as well as businesses that move agricultural and food products from the producers and processors to commercial buyers and consumers. Below is published data, survey results and stakeholder interview feedback pertinent to the current conditions of the processor and distributor sector in Franklin County.*

From an economic perspective, the majority of processor and distributor job numbers in Central Ohio are located within Franklin County. Based on data provided by EMSI, Franklin County houses 81.8% of processor jobs in Central Ohio and 81% of distributor jobs.

Historically, processor and distributor job numbers have remained fairly stable in Franklin County. Observing job numbers from 2001-2014, while processor job numbers decreased from 8,368 to 7,219 between 2006 and 2010; total job numbers have remained over 7,200 from 2010 to 2014. Distributor job numbers experienced a drop from 5,044 to 3,755 between 2002-2004 but have remained over 3,600 from 2011-2014.

Both Central Ohio and Franklin County are experiencing stagnant processor job growth while there is statewide processor job growth. Observing processor job numbers as a percent of total jobs in the economy from 2001-2014, Franklin County processor jobs went from making up 1.18% (8,816) of jobs in the total economy in 2003 to 0.96% (7,328) in 2014. Central Ohio went from 1.04% (10,180) in 2005 to 0.88% (9,037) in 2014. Ohio increased from 1% (58,863) in 2007 to 1.13% (64,203) in 2014.

Average wages in Franklin County for the processor sector were $23,537 in 2001 and $29,174 by 2014. For distributors, average wages were $37,817 in 2001 and $48,891 in 2014. There is no clear indication whether the increases are a result of inflation, profit growth within the sector or other factors.

## - Survey Results -

***Background:*** 10 respondents ranging from less than a year to 88 years in the business took the survey; four of the respondents have been in business 10 years or less. The majority of the respondents (62.5%) manufacture or distribute food products ready for human or animal consumption (cereal, frozen dinners, canned foods, etc.). Others included suppliers for semi-prepared food products for use in further processing, convenience store and food pantry network.

- Products: meats (33%), fruits and vegetables (33%), beverages (11%) and other (22%)
- Sales: $10,000,000-$49,999,999 yearly (55%). Others (44%) under $5,000,000 with half of those under $100,000.
- Employment: 49 employees or less (2 respondents employ 100-249); majority (77.8%) stated there is a reliable labor source and that they are adequately skilled for their required tasks.
- Distribution: 100 or more miles away (70%). Three respondents distribute over 1,000 miles and only two distribute 1-20 miles.
- Supply: Almost all respondents (90%) indicated sourcing from Franklin County while many indicated also sourcing from Central Ohio and beyond. 7 respondents (70%) reported sourcing from outside of Ohio.

***Expansion potential:*** 7 out of 9 respondents said they could potentially process and/or distribute 26% or more. Only one respondent indicated operating at capacity.

***Expansion barriers:*** 4 respondents (44%) out of 9 report lack of skilled workforce or access to capital while the other respondents were each split between regulatory compliance, availability of programs to facilitate expansion, lack of financial incentives and insufficient transportation. No respondents indicated that technology, lack of supply or demand were barriers. Finally, none reported that they were not interested in expanding.

***Impact to bottom line:*** Access to competitively priced agricultural products (100%) had a moderate or high impact to the respondent's bottom line. Labor costs (80%) and access to capital (80%) also had a moderate to high impact. Respondents reported that the lowest impact on the bottom line was consolidation of equipment and/or packing suppliers (90%) or consolidation of food retailers and/or wholesalers (50%).

***Defining local:*** Most of the respondents (77.8%) define "local" as being produced in Ohio while some indicated Central Ohio (22%).

***Working with local producers:*** The majority (80%) of the respondents are interested in increasing the amount of food processed and distributed from Central Ohio producers. Most respondents (67%) indicated that their operations used 1-40% of food from Central Ohio producers with about half of those respondents using less than 20%. Two respondents indicated that their operations include over 61% of food from Central Ohio producers.

***Barriers:*** The main limitations to processing or distributing food from Central Ohio producers are availability of product (62.5%). Two respondents indicated price and one respondent indicated quality as limitations.

## - Stakeholder Interviews -

*Feedback related to processors and distributors and their relationship to the local food system surrounded infrastructure, supply, storage, distribution, meat processing and regulations.*

***Infrastructure:*** One local commercial buyer and a local processor emphasized a continued need for commercial kitchen space for startup processors who cannot afford the overhead fees of purchasing a building.

***Supply:*** A commercial buyer and processor stated there is inadequate supply to consistently meet the demands driven by a lack of local producers and an inadequate infrastructure to extend the growing season. A local distributor also indicated that distributors must work with multiple local producers to effectively secure the required amount of products, which poses logistic problems. Sometimes commercial buyers request distributors to provide local produce but the distributor is unable to because of low quantities or varying prices between producers. However, a local distributor stated in some situations, there is more incentive for processors and distributors to use local producers during harvest times of the year with the abundance of produce and often better prices.

In addition to quantity, distributors are largely concerned with the quality and safety of local produce as they must meet the demands of commercial buyers and guarantee them a consistently quality product to sell. Distributors have a difficult time trusting local producers to grow the right amount of crops at the right time. Conversely, producers have a difficult time trusting distributors to pay what they promised. According to a local distributor, producers sometimes require distributors to enter into contracts guaranteeing payment regardless of harvest amount and this often discourages partnership with distributors.

***Storage:*** A local distributor stated they lack storage capacity and technology to take in and preserve produce delivered at different times from different producers while it’s awaiting distribution. A commercial buyer does not believe there are currently any local processors with the right equipment or means to preserve and store surplus local produce and make it last through the winter.

***Distribution:*** One local processor noted that there are currently no small scale distributors to accommodate smaller processors who only need a limited number of items shipped on a consistent basis.

***Meat supply and processing:*** A stakeholder noted that Central Ohio experiences a severe lack of locally produced meat, which is most likely the result of not having enough local meat processors—there is no market for unprocessed meat. There is one local meat producer who performs some processing but commercial buyers are still unwilling to purchase the meat because they do not have workers trained to cut unprocessed or limited processed meat, preparing it for direct sales. In addition to lacking skilled workers or willing buyers, local meat producers must compete with larger, non-local meat processors who use a lower paid workforce.

***Regulations:*** A stakeholder mentioned that start-up processor and distributor businesses encounter up-front regulatory barriers. For example, there are different regulations and enforcement agencies depending on whether the product is sold through retail or wholesale. Additionally, one commercial buyer noted securing a license for meat processing was difficult. For processors, safety standards can be difficult as food processed outside of inspected commercial kitchens are health violations requiring further reliance on finding affordable commercial kitchen space.

# COMMERCIAL BUYERS

*The commercial buyer sector comprises varying sizes of retail, wholesale and institutional food buyers, including restaurants, hotels, hospitals and schools. Below is published data, survey results and stakeholder interview feedback pertinent to the current conditions of the sector in Franklin County.*

The majority of the commercial buyer sector jobs in Central Ohio are located within Franklin County. Jobs include food service workers, food manufacturers and other retail food sales. Based on data provided by EMSI, Franklin County contains 69% of all the commercial buyer jobs in Central Ohio.

Historically, Franklin County, Central Ohio and Ohio experienced steady job growth in the commercial buyer sector. Observing commercial buyer sector job numbers as a percent of total jobs in the economy from 2001-2014, Franklin County jobs went from making up 9.03% of jobs in the total economy in 2004 to 9.92% (75,725) in 2014. Central Ohio went from 9.48% in 2004 to 10.66% (109,902) in 2014. Ohio increased from 9.37% in 2001 to 10.67% (608,610) in 2014.

Average wages for jobs in the commercial buyer sector in Franklin County have historically been higher than the average wages in Central Ohio and the State. In 2014, the average wage for jobs in the commercial buyer sector in Franklin County was $22,143 compared to $21,016 in Central Ohio and $19,142 in the State.

Furthermore, average wages for commercial buyer jobs in Franklin County increased at a rate which exceeds the rate of increase for the rest of the total economy in Franklin County. Average wages increased by 30.99% from 2001-2014 for this sector compared to the 27.23% increase for rest of the total economy. This might indicate that these increases in average wages for the sector are not simply a result of inflation or overall growth in the economy but something particular to the sector. In 2001, average wages for commercial buyers in Franklin County were $17,255.

Compared to all other sectors of the food system, average wages for commercial buyer sector jobs in Franklin County remain lower. In 2014, Franklin County average wages for distributors, processors and producers were $48,891, $29,174, $28,941, respectively. Commercial buyer average wages were $22,143.

## - Survey Results -

***Background:*** 105 respondents represented a range of buyers including restaurants/bars (35%), schools (25%), food retailer only (11%), hospitals (10%) and others including: hotel, health care facility, primarily a food retailer but also a food manufacturer and "both a food manufacturer and food retailer to the same extent". Respondents electing to identify in other categories included: gas station, childcare center, food truck, caterer, convenience store, cafeteria and personal chef. There were no correction facilities represented in the survey responses.

Results show that respondents purchase a wide range of food products including: dairy, eggs, meats, fruits, vegetables and specialty prepared goods (bread, etc.). Dairy and vegetables ranked the highest in terms of number of respondents who purchase these products with meats and fruits closely following. While a significant number of respondents purchase eggs and specialty prepared goods, they were last.

***Spending:*** Some respondents (31%) spend $500-$2,500 weekly on food while 28.7% spend approximately $2,501-$10,000. Other respondents (15.7%) spent $10,001-$50,000 weekly. Fourteen respondents (13%) indicated that they purchased less than $500 weekly.

***Purchase priority:*** Out of 107 respondents, 101 (94%) reported that taste is important or very important when deciding what foods to buy. Additionally, 95% indicated quality, 93% appearance and 97% cost as important or very important. Just over half of the respondents (52%) reported that "organically grown" was not an important factor in deciding what to buy while 27% of respondents indicated the same with food "grown without pesticides".

***Purchase location:*** Out of 104 respondents, 49 (47%) did not know if the food they purchased was grown or produced within Central Ohio (Delaware, Fairfield, Franklin, Licking, Madison, Pickaway, and Union counties). Other respondents (45%) reported that it was grown or produced in Franklin County. The next closest was Licking County (21%) and the rest of the Central Ohio counties followed close behind.

***Defining local:*** A majority (66%) of respondents defined local food as food produced in Ohio. While 30% defined local food as food produced in Central Ohio. Only two respondents defined food produced in Franklin County as local food.

***Percentage of local food purchased:*** Of the 40 respondents who indicated that they purchased food from Franklin County or a surrounding county, 12 respondents (30%) believed that only 1%-5% of all the food products they purchase originated from Central Ohio. Twenty respondents (50%) indicated 6%-20% while 8 (20%) indicated 21-60%. None of the respondents indicated purchasing over 60%.

***Purchase times:*** Of the 40 respondents who indicated that they purchase food from Franklin County or a surrounding county, those who purchase dairy, eggs and meats are most likely to purchase them weekly. Fruits and vegetable were purchased weekly and seasonally.

***Purchase method:*** 80% of the 40 who answered purchased through deliveries from a distributor while some respondents purchased through a supermarket (37.5%) or farmers market (35%). Ten respondents (25%) purchased directly from a farmer.

***Price comparison:*** 45% of the 40 who answered indicated that the price for locally grown or produced food is similar in price to non-local while 40% indicated that Central Ohio food is somewhat more expensive than non-local in their experience.

***Local product importance:*** Out of the 105 respondents who answered, 67.6% reported it was somewhat or very important to provide local food options to customers while 24.7% were neutral. Only 5.7% stated it was not important.

***Barriers to purchasing local:*** 81 (86%) out of 94 respondents who answered reported that convenience was somewhat or a significant barrier. Distribution (83%) and seasonal availability (84%) were next. Food safety (56%) was not a significant barrier to buying local.

***Product interest:*** In order of most interest to least in purchasing, respondents indicated locally produced fruits and vegetables, dairy and eggs, meats and specialty prepared goods.

## - Stakeholder Interviews -

*Feedback related to commercial buyers and their relationship to the local food system surrounded three themes: demand, connection and regulations.*

***Demand:*** Stakeholders' feedback, particularly from a local and independent grocery and restaurant, emphasized the growing demand and opportunity for locally produced and processed food. A stakeholder who works with many commercial buyers reported that start-up and smaller commercial buyers, such as food trucks, purchase produce and processed ingredients from large scale distribution wholesalers because of price and availability.

***Connection:*** The barrier to effectively connecting commercial buyers and producers, as with processors and distributors, is that local producers do not produce enough on their own. Local producers also do not present commercial buyers with a consistent price. One stakeholder, who relies on and emphasizes using local produce, found it difficult to work with multiple local producers who delivered their products at different times of the week and changed their prices throughout the year making it difficult for the stakeholder to offer their products at consistent price to the customer. Additionally, without an extended growing season, the commercial buyers are forced to work with non-local producers during the winter. Some commercial buyers remain unaware of the availability of local produce, which makes it all the more inaccessible. Many commercial buyers, particularly grocery stores, do not have skilled staff to process meat from local producers. Some large chain grocery stores rely on processors to cut up produce giving responsibility to the processor on deciding where to purchase produce.

***Regulations:*** Commercial buyers must be sure that processed food was handled, stored and processed in accordance with all food safety standards including: inspected commercial kitchens and safe storage which may place further limitations on purchasing local foods.

# WASTE RECOVERY

*Waste recovery is intricately linked to all other sectors of the local food system. Below are survey results and stakeholder interview feedback pertinent to the current conditions of the waste recovery sector in Franklin County.*

## - Survey Results -

***Consumer:*** The majority of respondents (68%) indicated that they do not currently compost food scraps. Of those 350 respondents who do not compost food scraps, 48% are interested in doing so.

***Producer:*** Thirteen respondents (43%) out of 30 who answered stated only having excess product some of the time with thirteen other respondents (43%) stating they never have excess product. Out of the 20 respondents who answered questions on current and preferred disposal methods for excess product, 14 (70%) reported that they compost on-site (70%) and 8 respondents (40%) donate to charitable organizations that feed people. Only 10% of respondents report sending excess product to the landfill. When asked to identify their preferred method to dispose of excess product, 8 respondents (44%) out of 19 indicated on-site composting while 9 respondents (50%) indicated they would prefer to donate it to charitable organizations.

***Processor/Distributor:*** Five respondents (50%) out of 10 reported donation to charity as the primary means to dispose of excess food with three respondents indicating that excess food is sent to the landfill.

When asked to identify their preferred method for disposing of excess product, Four respondents (67%) out of the six who answered indicated a preference for donation to charity while two (33%) indicated sending it to off-site composting as preferable.

*Only 4 out of the 10 respondents (40%) chose to complete the waste portion of the processor/distributor survey. The results are below:*

***Waste audit:*** One respondent had completed a waste audit within the last five years and the others either did not know, were interested or not interested in completing one.

***Total food and compostable waste:*** Two respondents (50%) did not know the total monthly waste generated. The others (50%) reported either 20 cubic yards or greater than 40 cubic yards. Two of the respondents (50%) said the food and compostable waste was pre-consumer (generated before it reaches consumer) while the other two said it was post-consumer.

***Food waste reduction policies/practices:*** Only two respondents answered questions related to practices and policies. Both currently have a policy for ensuring proper storage. Separating food waste in a pre-consumer waste stream was an inconsistent practice for one respondent (50%) and a consistent practice with a policy being drafted for the other (50%).

***Food donation:*** Two (50%) currently donate with one (25%) able to donate more and the other (25%) not. None of the respondents indicated any significant or major barriers.

One respondent (25%) indicated liability was a moderate barrier and two (50%) said financial reasons were a slight barrier. Other slight barriers included insufficient storage and refrigeration at food banks, insufficient on-site storage and refrigeration and regulatory constraints.

***Interest in food waste diversion options:*** Three respondents (75%) were most likely to implement organizational policies to reduce food waste, compost waste for soil enrichment or send it out for animal feed.

Currently, all respondents use a dumpster for all food and compostable waste and three respondents (75%) send some edible or non-edible waste for animal feed and would like to send more.

***Food waste transportation and storage:*** The prevailing form of transportation is services provided by the receiver though one noted that they contract with a hauler.

***Barriers to food waste diversion:*** Significant barriers to food waste diversion from landfills are availability of services or lack of waste storage. Medium barriers include not knowing where or how, management and building constraints, regulatory issues, expense of services or rodents and pests. When asked for the absolute highest barriers, all three respondents selected availability of services, expense of services or regulatory issues.

Respondents identified proper equipment as the most helpful means to divert food from landfills with some also selecting food waste reduction policies and practices, connecting to services, employee and staff education and regulatory changes.

***Commercial Buyer:*** 94 respondents elected to take the waste survey. Out of the 60 respondents who answered, the majority (51.67%) did not know the average volume of waste generated per month while 38.33% indicated they produce 20 cubic yards or less.

***Waste audit:*** Only 16 out of 59 respondents (27%) indicated completing a waste audit in the past 5 years, 23 respondents (40%) are interested in completing one and 13 respondents (22%) were not interested in conducting a waste audit.

***Total food and compostable waste:*** 20 out of 59 respondents (34%) did not know the percent of their total waste stream that was comprised of food and compostable or indicated it was less than 20%. 8 respondents (13.6%) indicated food and compostable waste makes up 21-50% of their total waste stream while 10 respondents (17%) indicated that more than half of their waste stream is made up of food and compostable waste.

***Pre-consumer waste:*** 20 out of 59 respondents (34%) answered that almost none of their food and compostable waste is pre-consumer food and compostable waste (generated before it reaches the customer). 17 respondents (29%) did not know. 8 respondents (13.6%) reported about ¼ of the food and compostable waste is pre-consumer while 11 respondents (18%) reported ½ or more is pre-consumer food and compostable waste.

***Food waste reduction policies/practices:*** Respondents indicated practicing the following strategies:

- Ensuring proper storage techniques (52 respondents or 98%); 30 had a written policy
- Reducing prep waste and improperly cooked food (48 respondents or 90.6%); 18 had a written policy
- Reducing over-purchasing of food (47 respondents or 88.7%); 18 had a written policy
- Modifying menu to reduce food that is uneaten (44 respondents or 83%); 18 had a written policy

The following strategies were less commonly practiced:

- Separating food and compostable waste in pre-consumer waste stream (28 respondents or 53% were not consistently practicing)
- Separating food and compostable waste in post-consumer waste stream (29 respondents or 55% were not consistently practicing)

***Food donation:*** Out of the 50 who answered, 30 respondents (60%) do not donate edible food. Thirteen respondents (26%) donate some edible food with eight of those able to donate more.

***Food donation barriers:*** Out of the 53 respondents who answered, the following reported that these were moderate, significant or major barriers to donating edible food that is unsold to charitable organizations that feed people:

- Liability concerns (35 respondents or 66%); 18 reported it as a major barrier
- Transportation constraints (30 respondents or 57%); 5 reported it as a major barrier
- Regulatory constraints (28 respondents or 53%); 12 reported it as a major barrier
- Insufficient on-site storage and refrigeration (27 respondents or 51%); 8 reported it as a major barrier

Respondents reported that the following issues did not present a barrier to donating food:

- Lack of support from management (29 respondents or 55%)
- Insufficient storage and refrigeration at food banks (25 respondents or 47%)
- Financial (25 respondents or 47%)

***Animal feed:*** 43 respondents (80%) out of the 54 who answered reported that they do not send any food waste for animal feed. Only five (9%) indicated they are interested.

***Food waste transportation and storage:*** 25 respondents (51%) out of the 49 who answered reported they contract with a hauler to transport food and compostable waste for disposal. 11 respondents (22.5%) did not know and 8 respondents (16.3%) self-transport.

36 out of the 48 respondents (75%) who answered use a dumpster for food and compostable waste. 8 respondents (17%) use a roll off container.

***Interest in food waste diversion options:*** Out of the 46 respondents who answered, the following reported that these were options they were moderately, very or completely likely to use if made available:

- Organizational policies to reduce food waste (33 respondents or 72%); 9 reported they were completely likely
- Donating unsold edible food (29 respondents or 63%); 8 reported they were completely likely

Respondents indicate that they would not be likely to use:

- Vermicomposting (24 respondents or 52%)
- Digester (21 respondents or 46%)

***Food waste diversion preference:*** Twelve respondents (29.3%) out of the 41 respondents who answered would prefer composting for soil enrichment. Eleven respondents (26.8%) would prefer to donate unsold edible food. Eight respondents (19.5%) reported preference for food waste to be used as animal feed while seven respondents (17%) would prefer to establish policies to reduce food waste.

***Barriers to food waste diversion:*** Out of the 46 respondents who answered, the following reported that these were the moderate, significant or major barriers to diverting food and compostable waste away from landfills:

- Lack of food waste transportation (33 respondents or 72%); 6 reported it was a major barrier
- Expense of services (32 respondents or 70%); 9 reported it was a major barrier
- Don't know where/how (31 respondents or 67%); 11 reported it was a major barrier
- Availability of services (30 respondents or 65%); 11 reported it was a major barrier

The respondents indicated that the following issues were not a barrier to food waste diversion in their organization:

- Food waste volumes too high (33 respondents or 72%)
- Food waste volumes inconsistent (24 respondents or 52%)
- Food waste volumes too low (21 respondents or 46%)
- Community complaints (21 respondents or 46%)

***Primary barrier to food waste diversion:*** Eleven respondents (25.6%) out of the 43 who answered reported that food waste volumes are too low. Nine respondents (21%) indicate not knowing where or how to divert food waste. Five respondents (11.6%) reported the availability of services while four respondents (9.3%) indicated the lack of food waste transportation.

***Assistance in food waste diversion:*** Out of the 45 respondents who answered, the following reported that these would be moderately, significantly or very helpful resources in assisting them to divert food and compostable waste away from landfills:

- Connecting to services (41 respondents or 91%); 9 reported it would be very helpful
- Equipment (40 respondents or 88%); 10 reported it would be very helpful
- Employee/staff education (38 respondents or 84%); 6 reported it would be very helpful
- Regulatory changes (34 respondents or 75.6%); 9 reported it would be very helpful

- Customer education (36 respondents or 80%); 7 reported it would be very helpful

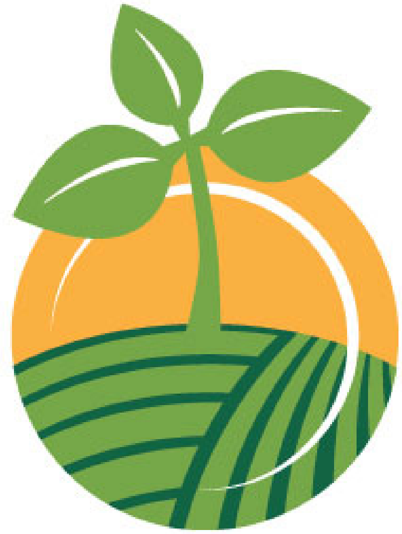
## - Stakeholder Interviews –

*Feedback related to waste recovery and its relationship to the local food system surrounded three overarching themes: demand, infrastructure and opportunity.*

***Demand:*** Public agencies strongly support and even call for waste recovery exploration and initiatives described specifically in MORPC's Organics Diversion and Columbus' Green Memo III. In the past, local businesses interested in commercial composting used Ohio Mulch. According to one stakeholder, the demand for commercial composting was too high for Ohio Mulch to process all of the compost. Currently, it is up to private businesses to find their own means to divert compostable waste from the waste stream. Some stakeholders primarily divert food waste by providing it to local urban and rural farms for compost. One stakeholder established a compost collection system and currently uses an anaerobic digester.

***Infrastructure:*** Currently there are no compostable waste hauling operations or processing facilities to support large scale collection in Franklin County. The area also lacks the sorting infrastructure necessary to allow businesses to effectively separate compostable materials from the rest of their waste stream. In general, there is currently a lack of spatial understanding relative to the physical location of where compostable waste is generated in the community to guide development of an effective collection and processing plan.

***Opportunity:*** Stakeholders report that there is an opportunity to increase awareness and interest in diverting compostable waste. At the household level, local regulations relative to residential composting, while varied, can be restrictive. At the commercial production and distribution levels, the growing number of local producers, particularly specialty crop producers, creates opportunity for farmers to use organic waste for composting. Additionally, the farm-to-table model for restaurants may help decrease organic waste generation as buyers are purchasing only what they need in small amounts rather than bulk.



SECTION 4
# VISION

*This section provides a draft vision statement for the local food system. The Vision statement describes the community's desires for the local food system and will guide future recommendations to strengthen the system. The draft vision was developed using the information presented in the current conditions portion of this report and from Working Committee feedback about the local food system.*

## DRAFT VISION STATEMENT

"The Columbus-Franklin County Local Food Action Plan envisions a food system that benefits our community, our economy and our environment in ways that are equitable and sustainable."

## AREAS OF FOCUS

The Working Committee identified strengths, weaknesses and aspirations for the local food system relative to the Plan's four focus areas at their first meeting in June of 2015. The four focus areas include: food access and education, economic development, food waste, and coordination and communication. The Project Team grouped the Working Committee feedback in the most applicable focus area listed below:

***Access & Education***

*Strengths:*
- The increased focus on local food and access to it
- The growing infrastructure of farmer's markets
- Food costs are fairly low in certain areas
- We are currently producing a lot of food and a good variety
- More healthy grocery stores
- A robust emergency food system
- A robust emergency food system that distributes fresh foods
- Our food is safer
- Consumer consciousness of the relationship between food and health
- Consumer consciousness on fresh and local

*Weaknesses:*

- More strategic locations that provide access to nutritious foods
- Affordability
- Greater community awareness
- Education on nutrition and healthy food preparation and preservation
- Consumer education of varying growing attributes
- Consumer understanding of food "attributes" or designations (organic, fresh, all-natural)
- Science-based food and nutrition information for consumers
- Consumer education on food prep/storage/cooking/food safety
- Inequity issues (racial and environmental)

*Aspirations:*

- We need an AND approach because all families obtain food from multiple sources and systems
- More opportunities to access healthy, local nutritious foods
- Expansion of grocery stores in all Columbus neighborhoods
- A grocery store in every neighborhood
- Connect the value of food and food production to consumers of all socio-economic levels
- Fix the disconnect/inequities
- An increase in nutrition education and healthy food preparation
- Neighborhoods with Food system identity based on their strengths in a countywide context

***Economic Development***

*Strengths:*

- Ability to attract healthy/premier grocers and consumers are buying in
- Infrastructure in place
- Vision – deliberative, systematic planning to take advantage of our resources

*Weaknesses:*

- A Local competitive and affordable food supply
- Capacity – having all the food to distribute
- Financing
- Meat and other processing
- Local procurement models of sufficient and significant scale
- Infrastructure needed for the local food system
- More infrastructure to support local food production, distribution, and processing
- More farmers
- More farmers producing non-comm.

*Aspirations:*
- Policies align with market, the producers, and the residents in need
- A Well-known model of institutional demand
- More farms and food producers in urban and peri-urban areas
- More farmers in rural and urban agriculture
- Efficiently moving more healthy and affordable food through the system
- Have a good infrastructure and system inside the different neighborhoods
- To create jobs in the neighborhoods
- Local Scale and Competitiveness

***Food Waste***

*Strengths:*
- N/A

*Weaknesses:*
- Ways to manage food waste
- A food waste system

*Aspirations:*
- A robust food waste system

***Coordination & Communication***

*Strengths:*
- Experiments happening within the community which could be scaled up
- Momentum – lots of people in the mix advancing solutions
- Positive and attractive energy – this is a place people can make a difference
- The existing system - has “good pieces to connect and models to build on”

*Weaknesses:*
- Reconciling what are really multiple food systems – Retail, restaurant, emergency feeding, farmer’s markets, CSA
- Integrate national and other data, priorities, and models to inform the local plan and policies.
- We have talked about plan not system
- Stronger coordination between the different groups
- Participation from community health resources such as OhioHealth, OSU, NCH, and insurers
- Still a small choir using a lot of jargon

*Aspirations:*

- This work needs to be part of a larger community goal or it risks being under-resourced
- A plan that articulates our shared fate in a healthy food system
- A clear, tactical, plan that people can implement
- Work to exceed national norms and mandates on food, health outcomes, and economic development
- Identification of projects and organizations that are making the education, production, and availability possible