



**Study Advisory Committee Meeting:
Greater Philadelphia's Food Production and Food Economy
Tuesday, March 31, 2009
10:00am**

Delaware Valley Regional Planning Commission (DVRPC)

The ACP Building - 8th Floor
190 N. Independence Mall West
Philadelphia, PA 19106-2582
Telephone (215) 592-1800

Meeting Highlights

I. Welcome

Don Shanis, Deputy Executive Director of DVRPC, welcomed the Study Advisory Committee and commented on food systems as a new area of planning. Attendees went around the room introducing themselves, their organizations, and their interest in Greater Philadelphia's food system.

II. Review the Food System Study's Scope

Alison Hastings, Senior Environmental Planner and the Project Manager for the Food System Study, reviewed the Greater Philadelphia Food System Study's scope of work, including highlights from Part 1: Policy Network Analysis and Part 2: the Food Freight Analysis. Parts 3 and 4 are the focus of this SAC meeting.

III. Part 3: Agricultural Resources Assessment

Alison Hastings led the data compilation and analysis for Part 3. This part draws on the United States Department of Agriculture's Census of Agriculture and compares the 100-Mile Foodshed's agricultural land base and industry to the nation's land base and industry.

Agricultural Land Base

The 100-Mile Foodshed consists of 70 counties in five states on almost 30,000 square miles. Over 30 million people live within the 100-Mile Foodshed. This is 10% of the country's population on less than 1% of the country's land. The 100-Mile Foodshed is the densest part of the United States with over 1,000 people per square mile. The United States, as a whole, has 85 people per square mile. 27% of the 100-Mile Foodshed's land area is devoted to agricultural uses, compared to 40% of the country's land area devoted to agricultural uses. The 100-Mile Foodshed has less than 1% of the country's agricultural lands. However, over 2% of the nation's farms are within the 100-Mile Foodshed. And over 2% of the nation's value of agricultural products is produced within the 100-Mile Foodshed. Though this region is not a large agricultural region, it does not mean that agriculture is not important to Greater Philadelphia's landscape and economy.



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Agricultural Industry

Between 2002 and 2007, the 100-Mile Foodshed's agriculture industry reported a 43% increase in the market value of agricultural products sold. Similarly, the United States reported a 48% increase in the market value. Three of the foodshed's 70 counties are in the top 50 of top agriculture counties in the United States. Ten counties produce over 60% of the total value of agricultural products for the entire foodshed. Similarly, nine states make up 50% of the agricultural value of the United States. Sales per farm show that farms within the 100-Mile Foodshed, though smaller in size, are slightly more productive than the average for the nation.

Analyses in Part 3 concluded that: 1) Other land uses and agriculture (and different types of agriculture) compete for land; 2) a significant portion of farmers are transiting over to higher value products; 3) while direct market sales continues to increase, there is probably potential for even more direct sales; and 4) the farmers in the 100-Mile Foodshed are slightly ahead of the nation's overall agricultural trends.

The Power Point Presentation outlining the more comprehensive findings will be available on DVRPC's website at: <http://www.dvrpc.org/planning/food/part3.htm>.

IV. Part 4: The Food Economy

Amy Miller, Environmental Planner at DVRPC, led the effort in analyzing Greater Philadelphia's Food Economy.

What We Eat

This section looks at what food Americans eat, health trends, such as diabetes and obesity, which are related to diet, and food insecurity in the Philadelphia Metropolitan Statistical Area. Data on food consumption is only available on the national level, and it's measured by food availability, which is used as a proxy for actual food consumption. In 2006, the average American ate 1,619 pounds of food a year.

How We Spend Our Food Dollars

This section examines how much Philadelphians spend on food, and what types of food. The Philadelphia MSA is compared to other metropolitan areas in the Northeast (Boston, New York, Baltimore, and Washington, DC). While the average household in the United States and within the Northeast MSAs spends about 12% of their income on food, each household has remarkably disproportionate buying power. For example, while the average household in Greater Philadelphia may spend about \$5,600 on food each year, an average household in DC may spend about \$7,500 on food. This is representative of the higher per household income in DC. In 2006, the Philadelphia MSA had the lowest per household income of the five Northeastern MSAs (Bureau of Labor Statistics, 2008).

How Important is Food to the Regional Economy

To measure the impact of the food economy on Greater Philadelphia's overall economy, DVRPC identified six food-related sectors measure by the US Census Bureau in the

The logo for the Greater Philadelphia Food System Study. It features a decorative flourish at the top with a sunflower in the center. Below the flourish, the words "GREATER PHILADELPHIA" are written in a small, orange, sans-serif font. Underneath that, the words "FOOD SYSTEM STUDY" are written in a large, bold, green, sans-serif font. A horizontal line is positioned below the text.

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Economic Census and annual business surveys. 11% of all non-farm jobs in the Philadelphia MSA are located in the food economy. This is a very conservative estimate considering that agricultural production, food transportation, and other specialized jobs like food science are not included due to limitations within the Census Bureau data. Taking a closer look at food manufacturing, DVRPC found that Pennsylvania has a very strong food manufacturing base. Pennsylvania is fourth in the United States, after the major food manufacturing states of California, Illinois, and Texas.

Analyses in Part 4 concluded that: 1) Greater Philadelphia has less buying power than other metropolitan areas in the Northeast; 2) Pennsylvania has a strong food manufacturing base, which produced over \$12 billion in added value; and 3) the Food Economy is highly dependent on population and place.

The Power Point Presentation outlining the more comprehensive findings will be available on DVRPC's website at: <http://www.dvrpc.org/planning/food/part4.htm>.

V. Next Steps

- Part 3 will be written in April and a sub-committee of SAC members will review it. A sub-committee meeting to discuss Part 3 will be scheduled in May.
- Part 4 will be written in May and a sub-committee of SAC members will review it. A sub-committee meeting to discuss Part 4 will be scheduled in late May or early June.
- The study will be published and released to the public in August 2009.
- DVRPC will start its Plan for a More Sustainable Food System in July 2009.
- The Next Study Advisory Committee meeting will be held on Thursday, 7/30 (TENTATIVE date). At this meeting, the SAC will discuss: 1) What did we learn from the study? 2) Where do we want to go from here? And 3) How do we move forward?

VI. Questions

Study Advisory Committee members asked various questions.

VII. One Minute Reports

Attendees provided information on their work and highlighted efforts not included in the agenda such as:

- City Harvest is looking to work with urban food and farming entrepreneurs to broaden the impact of growing fresh local food for food assistance agencies, soup kitchens, and food cupboards.
- Domenic Vitiello, Dennis Burton, and Deenah Loeb announced the Youth Ag Symposium, on 4/25 at Philadelphia's Saul High School. Domenic also announced that the Saul High School CSA still has shares available:
<http://weaversway.coop/index.php?page=saul-csa>.



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- Ellen Holtzman from The Food Trust announced the formation of the Greater Philadelphia Food Systems Network. Its first event will be on May 7th. More details to follow.
- Cliff David of the Heritage Conservancy shared information from the Conservancy's Sustainable Food Systems Breakfast Forum, held on 3/26.
- Donna Drewes of the TCNJ Municipal Land Use Center asked for assistance in identifying Best Management Practices to be included into the Sustainable Jersey program. <http://www.sustainablejersey.com/>.
- Peleg Kremer from University of Delaware's Center for Energy and Environmental Policy shared her efforts to write a report to Delaware legislators on the benefits of sustainable agriculture.
- George Matysik from Philabundance commented that the regional emergency food organization has experienced increased demand, especially from the suburbs.

Part 2 Sub-Committee meets at 1pm in the Pennsylvania Room.

Next Study Advisory Meetings:

Part 3 Sub-Committee Meeting – TBD

Part 4 Sub-Committee Meeting – TBD

Tentative - Thursday, July 30, 2009: Planning a More Sustainable Food System – 10:00am



Announcements

Philadelphia Film Fest & The Food Trust

Movie Screening and Discussion Panel
Film, Inc.

Wednesday, April 1 4:45 at International House
Philadelphia, PA

[http://www.phillycinefest.com/film-
details.cfm?c=219&id=8659](http://www.phillycinefest.com/film-details.cfm?c=219&id=8659)

Slow Food Northern New Jersey

Annual Meeting: Farms, Food and Community

Saturday, April 4, 2009 2-5pm

Essex County Environmental Center

621 Eagle Rock Avenue, Roseland, NJ 07068

<http://www.slowfoodnnj.org/>

Fox Temple School of Business

*4th Annual Social Entrepreneurship Conference: Can
Local, Healthy Food Transform Our Community?*

Wednesday, April 8, 2009, 8 a.m. – 1 p.m.

Temple U – Student Activity Center, Room 200

Philadelphia, PA

<http://sbm.temple.edu/iei/>

Greater Philadelphia Coalition Against Hunger

Walk Against Hunger

Saturday, April 11, 2009, 8am to 1pm

Eakins Oval, Philadelphia Museum of Art

<http://www.hungerwalk.org/>

PUFFA

Food in Communities Meeting

Tuesday, April 14, 2009, 9am to 12pm

United Way of Southeastern PA

Seven Benjamin Franklin Parkway

Philadelphia, Pennsylvania 19103

<http://www.phillyfoodandfitness.org/>

and

Community Land Use and Design Meeting

Tuesday, April 15, 2009, 4pm to 7pm

Bartram's Garden

54th St. and Lindbergh Blvd.

Philadelphia, PA 19143

<http://www.phillyfoodandfitness.org/>

New Jersey Farm to School Conference

Saturday, April 18, 2009 – 8:30am-3:30pm

The Lawrenceville School, 2500 Main St

Lawrenceville, NJ

<http://www.njfarmtoschool.org/>

White Dog Café's Breakfast Talk

*Slow Money: Investing as if Food, Farms, and Fertility
Mattered*

Tuesday, 4/28, 8am

White Dog Café, 34th and Samson, Philadelphia, PA

<http://www.whitedog.com/04282009.html>

Princeton Environmental Institute

"Feeding a Hot and Hungry Planet" Conference

4/29 to 5/1, Princeton University

Princeton, NJ

<http://www.princeton.edu/morefoodlesscarbon/>

Pennsylvania Land Trust Association (PALTA)

2009 7th Annual Pennsylvania Land Conservation

Conference & Confluence

May 7 through May 9, 2009

Penn Stater Conference Center Hotel

State College, PA

Philadelphia Urban Sustainability Forum

How Can We Feed Philadelphia? Growing the Grange

Thursday, May 21, 6:30pm to 8:30pm

Academy of Natural Sciences

Philadelphia, PA

City Parks Association, Schuylkill Center, and Penn State Extension

*Growing the Grange: Skill Building Workshops for the
Urban Farmer*

Friday, May 22, 2009, 8:30am

Schuylkill Center for Environmental Education

Philadelphia, PA

<https://growingthegrange.ticketleap.com/>

Northeast Regional Center for Rural Development

Enhancing Local and Regional Food Systems –

*Exploring the Research, What Works, and What We
Need to Learn*

May 19-20, 2009

Kerhonkson, NY

<http://nercrd.psu.edu/LocalFoods/Conference.html>

Request for Proposals due 4/3

Community Food Security Coalition

2009 National Conference

October 10-13, 2009

Des Moines, Iowa

<http://www.foodsecurity.org/>

Request for Proposals due 4/30



Meeting Participants

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