Unlocking the potential of Charlotte’s Farmers’ Markets

Project Findings and Initial Strategies

January 2018
Project background and introductions
Objectives & outcomes
Work plan & process
Charlotte in context
What we’ve learned
Initial strategies identified
Next steps
In 2015, the City Manager, at Council’s request, asked staff to examine Charlotte’s farmers markets and food system.

**Mission**

Develop a recommendation for a Charlotte public market system that supports food access, entrepreneurship, and farmers while building community and place throughout Charlotte and the region.

**Team Members**

- **Tom Warshauer** – Housing & Neighborhood Services
- **John Short** – Housing & Neighborhood Services
- **Lori Lencheski** – Economic Development
- **Alberto Gonzalez** – Planning
- **Katrina Young** – Planning/Zoning
- **Jason Lawrence** – CATS
- **Elliott Royal** – Mecklenburg County Health Department
- **Johanna Quinn** – CDOT
Scope of Work
Gain a comprehensive understanding of the local food system:

- Are there sufficient farms to serve Charlotte markets now and future farming capacity to serve it in the future?
- How can markets better serve farmers and support food entrepreneurship and jobs in Charlotte and the region?
- What is the role of the City as well as the role of the for-profit and non-profit sectors in supporting food system enhancements?
- Are the current markets and food system capturing the full strength of Charlotte’s consumer base, both retail and wholesale?
- How can markets better serve all Charlotte communities by addressing the underlying forces that enable some communities to have access to locally grown foods while leaving others out?
• E&PM Director lead a group to research markets in other communities to learn how an uptown Charlotte market could improve the sense of place and improve food access for low income communities.

• CCCP opens 7th Street Market
• Access issues and recommendations from a ULI study prompt City to look at relocating State Farmers Market from Yorkmont to Independence Blvd.

• CMFPC releases State of the Plate report on food access
• City's internal farmers' market analysis team formed

• Over 60 food system stakeholders attend meeting in December at CMGC to discuss issues and give feedback and input on direction of the analysis
• Meck County Health Dept. opens Rosa Parks Market

• February – RFP issued, seeking a consultant to develop recommendations to enhance retail and wholesale food systems, address food access, and build community and place.
• Summer - Karen Karp & Partners selected as consultant for this project
The objective of this project is to develop recommendations for a Charlotte market system that supports farmers, entrepreneurship and food access while building community and place throughout Charlotte and the region.
Farmers’ markets are the lever and lead frame, while the key areas of impact are:

• a stronger regional food economy
• improved livelihood for farmers and food entrepreneurs
• more equitable food access
• community building and placemaking
The outcome of this project will be an integrated set of recommendations for Charlotte’s farmers’ markets - responsive to local dynamics and informed by national models - with a clear implementation plan.
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<thead>
<tr>
<th>SEPT. – OCT.</th>
<th>OCT. 12-14 Visit 1</th>
<th>OCT. – DEC.</th>
<th>JAN. 8-10 Visit 2</th>
<th>JAN.-MARCH</th>
<th>MARCH Visit 3</th>
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<tbody>
<tr>
<td>Onboarding and context research</td>
<td>Kick-off meeting</td>
<td>Additional interviews by phone</td>
<td>Farmer focus groups (2)</td>
<td>Development and revision of recommendations and final deliverables</td>
<td>Final presentations to City Council, City Manager, Community</td>
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<tr>
<td>Inventory markets, initiatives, stakeholders, etc.</td>
<td>Interviews</td>
<td>Additional market visits by local team members</td>
<td>Market Manager Focus Group</td>
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<tr>
<td>Develop interview guides</td>
<td>Market visits</td>
<td>Complete all interviews</td>
<td>Client meeting</td>
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<tr>
<td>Visit 1 planning</td>
<td>Site visits</td>
<td>Benchmarking research</td>
<td>Open community meeting</td>
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<td>Summarize &amp; synthesize research</td>
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**DRAFT**
WORK PLAN & PROCESS

Areas of research:
• Farming in the region
• Farmers’ market landscape
• Wholesale food distribution
• Food access and security

Approaches:
• Literature review
• Review of secondary data
• Mapping
• Interviews with approx. 35 stakeholders to date
• Site visits (existing markets and potential sites)
• Benchmarking and model research
CHARLOTTE IN CONTEXT: Charlotte Demographics

**Charlotte City**
- Population (2016): 842,029
- Median Household Income: $61,017
- % Population (25+) with HS: 89.4%
- % Population (25+) with Bachelor’s: 44.1%
- Population Growth 2013-2015: 4.3%

**Charlotte MSA (10 counties)**
- Population (2016): 2.47 M
- Median Household Income: $59,979
- % Population (25+) with HS: 88.7%
- % Population (25+) with Bachelor’s: 34.4%
- Population Growth 2013-2015: 3.9%

*in top third of a 21-city peer cohort

American Community Survey 2016, 2015, and 2013 1-yr estimates; Benchmarking Central Ohio 2016
Mecklenburg County (MC) lost over 1/3 of its farms 1997-2012, while the MSA region lost just 6% of farms (almost 500). During that time, MC lost over half its farm acreage, while the MSA region lost just 2.6% of its farm acreage – about 25K acres. Despite these losses, Mecklenburg County agriculture sales increased by nearly 50%, while the region’s sales increased by 37%.

Union County has the highest agriculture sales in the MSA region by far.

Iredell, York, and Mecklenburg counties are ranked next respectively.

About 2/3 of the Charlotte Regional Farmers Markets’ vendors come from within the MSA region.
Connect Our Future (2014) found a $560 million gap in the 14-county region (MSA+4) between fruit and vegetable production and consumption.

“The potential for expanding local markets for local farm products is significant.”

From 1997 to 2012, farms in the MSA region saw direct sales increase over 90%, while the number of farms participating in direct sales increased by 81%.

However, still just 7.6% of the region’s farms participated in direct marketing in 2012.
There are over 25 farmers’ markets in and around Mecklenburg County.
CHARLOTTE IN CONTEXT: NC State Farmers’ Markets

**Charlotte**
- Built: 1985
- Size: 22 acres
- Attendance: 0.5m
- Retail buildings
- Open Tues-Sunday

**Western NC - Asheville**
- Built: 1977, master plan 2015
- Size: 36 acres
- Attendance: 1.4m
- Retail and wholesale facilities, garden center, restaurant
- Open daily

**Piedmont - Triad**
- Built: 1995
- Size: 77 acres
- Attendance: 1.8m
- Retail and wholesale facilities, garden center, restaurant
- Open daily

**Raleigh**
- Built/updated: 1956, 1992
- Size: 75 acres
- Attendance: 3.5m
- Retail, wholesale terminal with 5 wholesalers, truckers building, restaurant
- Open daily
CHARLOTTE IN CONTEXT: Food Access and Food Security

**Food Security:** access to healthful, affordable, and culturally appropriate foods at all times

**Food Access:** includes geographic/physical, economic, and cultural dimensions

<table>
<thead>
<tr>
<th></th>
<th>% of households enrolled in SNAP</th>
<th>% of population in poverty</th>
<th>Food insecurity rate</th>
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<tbody>
<tr>
<td>Charlotte City</td>
<td>10.6%</td>
<td>13.4%</td>
<td>n/a</td>
</tr>
<tr>
<td>Mecklenburg County</td>
<td>9.2%</td>
<td>12.1%</td>
<td>16.4%</td>
</tr>
<tr>
<td>Charlotte MSA</td>
<td>10.0%</td>
<td>12.3%</td>
<td>14.7%</td>
</tr>
<tr>
<td>North Carolina</td>
<td>13.5%</td>
<td>15.4%</td>
<td>16.5%</td>
</tr>
<tr>
<td>United States</td>
<td>12.4%</td>
<td>14.0%</td>
<td>13.4%</td>
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SNAP and poverty: American Community Survey 2016 1-yr estimates; Food insecurity: Feeding America 2015
CHARLOTTE IN CONTEXT: Food Access and Food Security

Relevant opportunities identified in State of the Plate (2015)

“Develop more points of food access that are accessible by walking or by public transportation, such as farmers markets or produce stands at transportation hubs, community centers, libraries, schools, churches, mobile markets, grocery store delivery or drop-off points.”

“Support programs that give low-income and food insecure households increased buying power, such as:
- Double SNAP dollars
- Fruit and Veggie Prescription program
- Increase SNAP and WIC availability to 100% of full-service stores in Mecklenburg County.”

- Existing farmers’ markets are marked in blue
- 2015 USDA Low-Income Low-Access (Vehicle)
- Carolinas Healthcare System SDOH high-risk areas
- Overlap of USDA and CHS SDOH risk areas
- State of the Plate Food Insecurity High-Risk Communities
**CHARLOTTE IN CONTEXT: Wholesale Activity**

**FARMS SELLING WHOLESALE DIRECT TO RETAILER (2012)**

<table>
<thead>
<tr>
<th>MECKLENBURG COUNTY</th>
<th>CHARLOTTE MSA</th>
<th>NORTH CAROLINA</th>
<th>UNITED STATES</th>
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<tbody>
<tr>
<td>23 farms</td>
<td>201 farms</td>
<td>4.4% of all farms</td>
<td>2.3% of all farms</td>
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<tr>
<td>9.7% of all farms</td>
<td>2.7% of all farms</td>
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**CHARLOTTE MSA**

**NORTH CAROLINA**

**UNITED STATES**
CHARLOTTE IN CONTEXT: Other Food System Assets
WHAT WE’VE LEARNED
Emerging Themes from our Interviews
WHAT WE’VE LEARNED

Interviews with approximately 35 stakeholders to date:

- Farmers
- Food and agriculture sector experts
- Farmers’ market managers
- Wholesale buyers
- Food access organizations
WHAT WE’VE LEARNED: Farming in the Region

- Supply and demand must grow in tandem.
- Farmers want better communication about reselling at farmers’ markets.
- Farmers need stronger wholesale channels.
- Farmers desire a more coordinated and strategic market system that understands their needs.

“I don’t know definitively if there are enough farmers and land available right now to satisfy local demand. At the same time – how artificial is that local demand? People say they want it and then go back to old habits.”
- Sector Expert
WHAT WE’VE LEARNED: Farmers’ Market Landscape

- Markets desire more support and engagement from the city.
- The potential for SNAP utilization at the city’s farmers’ markets is untapped.
- Market managers are (cautiously) interested in a platform for coordination and collaboration.
- Managers emphasize the importance of considering the multiple dimensions of markets’ community impact.

The city’s farmers’ markets are “missing this huge opportunity to band together with branding and marketing. If you had a joint media and market – with locations, times, hours – there’s untapped potential there.”

- Sector expert
WHAT WE’VE LEARNED: Farmers’ Market Landscape

• Joint marketing and clear, system-wide definitions and communication around local food, producer-vendors, resellers, and farmers’ markets would help consumers, markets, and farmers.
• Education will be critical in advancing the success and strength of the city’s farmers’ markets.
• There is much to be gained from a systemic, intentional approach to the location of markets.

“It’s a culture shift - what we eat is tied to our culture. Making that shift takes time.”
- Food access stakeholder
WHAT WE’VE LEARNED: Wholesale Food Distribution

• Wholesale activity is critical – and lagging.

• Farmers’ markets play a role in introducing buyers to farmers – but it is currently ad hoc.
WHAT WE’VE LEARNED: Food Access & Security

• Market locations and transportation accessibility are central considerations for food access.
• But - physical access to food is not enough – education plays a vital role in food security and food access.
• SNAP and other resources for food insecure populations can be better leveraged at the city’s farmers’ markets.
• Authentic community engagement, empowerment, and equity will be critical to successful market system strategies.

“Food should be an equalizer, not a separator”
- Food access stakeholder
WHAT WE’VE LEARNED: Key Opportunities

- Education & Marketing
- Market coordination
- Market placement
- Wholesale connections
- Community engagement and empowerment
INITIAL STRATEGIES IDENTIFIED
INITIAL STRATEGIES IDENTIFIED

STRATEGY 1
Create an integrated and centralized farmers’ market organization.

By creating a network and structure for communication, collaboration, marketing, and education, individual markets could more effectively cultivate a culture of eating local with farmers’ markets as a key point of entry.

Ideas:
- Membership structure for market participation and input
- ID near-term tangible collaboration opportunities

Models:
- Minneapolis Farmers’ Market Collaborative
- GrowNYC
- Michigan Farmers Market Association
- Crescent City Farmers Market New Orleans

PRIMARY IMPACT AREAS

Farmer & Entrepreneur Livelihoods  Regional Food Economy  Community Building & Placemaking  Equitable Food Access  Healthy Eating
INITIAL STRATEGIES IDENTIFIED

STRATEGY 2
Launch a major citywide education and marketing campaign.

The need to cultivate demand for local food and educate the public about farmers’ markets has emerged as a key theme from stakeholders. Joint marketing for participating markets, educational materials around eating seasonally and locally, and clarity around the benefits offered by growers and resellers could advance the culture of eating local in Charlotte.

PRIMARY IMPACT AREAS

- Farmer & Entrepreneur Livelihoods
- Regional Food Economy
- Community Building & Placemaking
- Equitable Food Access
- Healthy Eating

Ideas:
- Citywide SNAP promotion campaign
- Review FMPP grants for funded initiatives
- Joint marketing and centralized information resources

Models:
- Hartford OhSNAP!
- CitySeed New Haven
- FreshFoodNY app
INITIAL STRATEGIES IDENTIFIED

STRATEGY 3

Offer support for the city’s neighborhood markets.

Technical assistance resources, site location assistance, and small infrastructure grants or financing would go a long way toward strengthening the city’s markets and generating a sense of support and buy-in from the city.

Ideas:
- Competitive funding program for infrastructure
- TA for managers
- Targeted support for markets in food insecure / low food access areas

Models:
- Minneapolis Farmers Market Collaborative
- Eastern Market Detroit

PRIMARY IMPACT AREAS

Farmer & Entrepreneur Livelihoods  Regional Food Economy  Community Building & Placemaking  Equitable Food Access  Healthy Eating
INITIAL STRATEGIES IDENTIFIED

STRATEGY 4
Streamline and expand payment opportunities at participating markets.

Payment methods at the city’s farmers’ markets are inconsistent from market to market – even from vendor to vendor – and many markets do not accept SNAP payment – a critical barrier with respect to food access.

Ideas:
- Centralized, system-wide SNAP and credit card acceptance
- Double up bucks
- Fruit and Veggie Rx

Models:
- Michigan Farmers Market Association
- GrowNYC

PRIMARY IMPACT AREAS
- Farmer & Entrepreneur Livelihoods
- Regional Food Economy
- Community Building & Placemaking
- Equitable Food Access
- Healthy Eating
INITIAL STRATEGIES IDENTIFIED

STRATEGY 5
Create partnerships between farmers’ markets and hunger relief/food access initiatives.

Recovery of unsold fresh farmers’ market produce can be an effective approach for getting more fresh, healthy food to people of limited means – as long as the post-market supply chain is in place. Mobile markets and collaborative educational programming are additional opportunities.

Ideas:
• Recovery of farmers’ market product for distribution through emergency food networks
• Mobile markets
• Educational programming

Models:
• City Harvest and Greenmarket (NYC)
• Hartford Regional Market and Foodshare

PRIMARY IMPACT AREAS
Farmer & Entrepreneur Livelihoods
Regional Food Economy
Community Building & Placemaking
Equitable Food Access
Healthy Eating
INITIAL STRATEGIES IDENTIFIED

STRATEGY 6
Clarify and improve zoning regulations.

Interviews with market managers revealed some challenges with respect to zoning around farmers’ markets. If a farmers’ market organization is created (Strategy 1), this entity could play a critical role in working with the city to recommend improvements to market zoning codes that still meet the needs of other community considerations.

PRIMARY IMPACT AREAS
Farmer & Entrepreneur Livelihoods
Regional Food Economy
Community Building & Placemaking
Equitable Food Access
Healthy Eating

Ideas:
• Create a zoning code for farmers’ markets that better reflects the range of products and scale of vendors
• Simple, easy one-pager for market managers

Models:
• Portland’s Urban Food Zoning Code (OR)
• ChangeLab Solutions model ordinances
INITIAL STRATEGIES IDENTIFIED

STRATEGY 7
Define a clear framework of destination, neighborhood, and mobile/pop-up markets to guide new market development.

Farmers’ markets serve different objectives, operate at different scales, and have different needs. Defining a framework or typology of farmers’ markets for the city’s market system can help clarify opportunities, strategies, expectations, and resources.

<table>
<thead>
<tr>
<th>Ideas:</th>
<th>Models:</th>
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<tbody>
<tr>
<td>• Define destination, neighborhood, and mobile markets</td>
<td>• Pittsburgh</td>
</tr>
<tr>
<td>• Strategic approaches to siting new markets based on need and type</td>
<td>• Cityseed Mobile Market (New Haven)</td>
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PRIMARY IMPACT AREAS

<table>
<thead>
<tr>
<th>Farmer &amp; Entrepreneur Livelihoods</th>
<th>Regional Food Economy</th>
<th>Community Building &amp; Placemaking</th>
<th>Equitable Food Access</th>
<th>Healthy Eating</th>
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INITIAL STRATEGIES IDENTIFIED

STRATEGY 8

Create additional destination farmers’ markets to complement the geography served by the Regional Farmers Market.

The Charlotte Regional Farmers Market (CRFM) functions as a destination market. The City could support the creation of 1-3 additional destination markets – not necessarily at the footprint scale of the CRFM, but with permanent infrastructure (sheds, pavilions) that could anchor more significant market activity than a weekend pop-up.

IDEAS:
- Historic model of north, south, east, west markets
- Eastland Mall and Camp North End as potential sites

MODELS:
- GrowNYC
- Boston Public Market
- Seattle’s Pike Place Market

PRIMARY IMPACT AREAS

- Farmer & Entrepreneur Livelihoods
- Regional Food Economy
- Community Building & Placemaking
- Equitable Food Access
- Healthy Eating
INITIAL STRATEGIES IDENTIFIED

STRATEGY 9

Create a year-round indoor public market.

Taking a broader public market approach – one that incorporates both indoor and outdoor market space, wholesale and retail activities, a diverse product mix, and programmatic activities such as education and business incubation – could make a bold statement about Charlotte’s commitment to the regional food system and food entrepreneurship.

Ideas:
• Colocation of seasonal farmers’ market infrastructure with year-round indoor vendors and businesses

Models:
• Grand Rapids Downtown Market
• Milwaukee Public Market
• Boston Public Market

PRIMARY IMPACT AREAS
Farmer & Entrepreneur Livelihoods  Regional Food Economy  Community Building & Placemaking  Equitable Food Access  Healthy Eating
INITIAL STRATEGIES IDENTIFIED

STRATEGY 10

Make retail visitor-oriented improvements to the Charlotte Regional Farmers Market.

A more robust retail product mix – in particular, a stronger prepared food program that features a vibrant diversity of culinary and cultural options – would have a significant impact in creating more of a destination draw and experience for visitors to the market. At the same time, improved access could increase retail customer traffic.

PRIMARY IMPACT AREAS

Farmer & Entrepreneur Livelihoods

Regional Food Economy

Community Building & Placemaking

Equitable Food Access

Healthy Eating

Ideas:
• Stronger, more diverse prepared food options
• Pilot access initiatives: shuttles, weekend bus routes, etc.

Models:
• Rochester Public Market
• Improvements planned for Western North Carolina Regional Market
INITIAL STRATEGIES IDENTIFIED

STRATEGY 11
Create infrastructure to allow light processing and wholesale aggregation and distribution at the CRFM.

The CRFM is currently driven almost exclusively by retail sale of raw/whole fresh products. Other successful markets (farmers’ and public) have more diverse activities – including robust wholesale trade and on-site processing activities.

Ideas:
- Use of last shed for wholesale functions and tenants (distributors, food banks)

Models:
- GrowNYC Wholesale Farmers’ Market

PRIMARY IMPACT AREAS
Farmer & Entrepreneur Livelihoods
Regional Food Economy
Community Building & Placemaking
Equitable Food Access
Healthy Eating
INITIAL STRATEGIES IDENTIFIED

STRATEGY 12
Support local food processing and distribution outside of the Charlotte Regional Farmers Market.

Facilities and programs to support local food processing and wholesale distribution can take place outside of farmers’ markets. Some recent developments are being called “food hubs”.

Ideas:
- Local food warehouse
- Shared commercial kitchen
- Nonprofit or cooperative distribution company

Models:
- Red Tomato, Massachusetts
- The Common Market, Philadelphia
- Blue Ridge Food Ventures, Asheville

PRIMARY IMPACT AREAS
Farmer & Entrepreneur Livelihoods  Regional Food Economy  Community Building & Placemaking  Equitable Food Access  Healthy Eating
NEXT STEPS

• Narrow, refine and develop strategies based on feedback and input from this visit
• Benchmark research: communities with model initiatives
• Develop recommendations and roadmap