



GREATER PHILADELPHIA
FOOD SYSTEM STUDY

**Study Advisory Committee Meeting: Greater Philadelphia's Food Freight Analysis
Friday, December 12, 2008**

Delaware Valley Regional Planning Commission (DVRPC)

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

Agenda

I. Welcome

Patty Elkins, Associate Director of Comprehensive Planning at DVRPC, welcomed the Study Advisory Committee and highlighted DVRPC's emphasis on the comprehensive picture of land use and transportation in the region, including the importance of food and agriculture within that picture.

II. Review the Food System Study's Scope

Alison Hastings, Senior Environmental Planner and the Project Manager for the Food System Study, reviewed the goals of the Greater Philadelphia Food System Study and the four parts of the first year's scope, including highlights from Part 1: Policy Network Analysis. Over 171 people contributed to Part 1 through an online survey, interviews (phone, in-person), tours and roundtables. Respondents reported that a) the biggest advantage for the region is proximity to markets; b) the greatest challenges are rising costs for consumers and producers, c) the most noticeable changes are in the local and niche markets; and d) recommendations include innovations and new markets/economic development. Part 2 is the focus this SAC meeting. Parts 3 and 4 will be presented together and include an exploration of the region's land resources and the food economy.

III. Part 2: Food Freight Analysis Framework

Other Food Transportation Studies within the Region

Alison Hastings presented a brief discussion of three other transportation studies completed for different parts of the region. The first was a 1976 report on agricultural transportation in New Jersey conducted by the Department of Agriculture and Rutgers New Jersey Agriculture Experiment Station. It utilized historical and interview data, concluding that competition from western states shifted NJ production from livestock to fruits, vegetables and dairy. The 2007 Shipping Points study, undertaken by the Food Trust and the Department of Agriculture, surveyed producers across the state to explore options for producers to consolidate products for market. The study's authors found that the current auction system already serves this need; however, farmers are interested in more retail opportunities. The main recommendation of the study is the creation of Headhouse Square Farmer's Market in Philadelphia. Finally, the 2007



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feasibility study of the Common Market was funded through PA's First Industries grant program and used focus groups to explore supply and demand for a values-driven wholesale distributor to the Philadelphia market. The main recommendation was the creation of the Common Market as a non-profit to gain access to capital and opportunity to build its reputation.

Greater Philadelphia's Food Freight Analysis Framework

Walker Allen, a Freight Planner at DVRPC, presented the methodology and findings of the Freight Analysis Framework (FAF), a database created by the Federal Highway Administration to explore the movement and flow of goods throughout the region and nation and project trends to the year 2035. The FAF is based on 2002 data and does not aim to (or succeed in) reflecting the entire chain of a food item from farm to consumer. Rather, it is a planning tool for understanding how food freight moves and uses transportation infrastructure.

Supply Chain Case Studies

Jessica Brown, a Food System Planning Intern, presented findings of four supply chain case studies out of the sixteen conducted. The completion of case studies was chosen over performing food mile calculations, life cycle assessments, and trackbacks, because the other research methods were either unclear, inaccurate or has significant gaps. Four case studies were presented, including imported beef, avocados, locally-produced hot dogs, and locally-produced tomatoes.

Conclusions

The FAF concluded that most food moves by truck. Of the 8 food commodity categories, "other foodstuffs" (processed foods) are growing at the fastest rate and make up the largest share of food being transported in terms of weight and value. "Other ag products" (fresh fruits and vegetables) are the second most transported food commodity by weight. Between 2002 and 2035, the area's food freight is projected to increase in the amount of food to meet added demand. Additionally, food will increasingly be coming from further and further away from the Philadelphia area as domestic inbound and international import movements are projected to increase substantially.

The Case Studies concluded that the supply chain is the result of business relationships rather than an overarching policy, management or coordination by one (governmental) entity. It is also much easier to get information from local producers and businesses that are eager to cultivate interpersonal relationships.

The Power Point Presentation and in-depth speaker notes outlining the more comprehensive findings is available on DVRPC's website at:

<http://www.dvrpc.org/planning/food/part2.htm>



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IV. Questions

Questions from attendees clarified that the FAF forecast does not incorporate uncertainties or scenarios like changes in consumption patterns or peak oil scenarios. It is also based on business demographic data so it assumes that there will be a continued loss of agriculture production in this region coupled with continued population growth. There was a suggestion to look at national totals to compare the findings for the Philadelphia region and to incorporate “what if” scenarios in the study this year or next.

Many of the other questions were related to things that will be incorporated into Parts 3 and 4:

- How much produced in the region is consumed within the region?
- Is it safe to say if we don’t preserve land, the disproportion between supply and demand will grow?
- Opportunities for incentivizing the food economy through innovations and exploring region’s “catalysts”.

Other questions touched upon topics that cannot be addressed in the first year but may be incorporated into the second year’s work, such as the creations of Trend vs. ideal scenarios for food production and distribution, policy recommendations to create those ideal situations.

V. Next Steps

- Part 2 will be written and a sub-committee of SAC members will review it at the next SAC meeting on March 31, 2009.
- Parts 3 and 4 will commence and be presented on March 31, 2009.
- The completed Food System Study will be presented at the June 17, 2009 SAC meeting.

VI. One Minute Reports

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

- Infill Philadelphia: Food Access is nearing a close with its design competition. Sign up for updates on the final presentation and report at the Community Design Collaborative’s webpage: <http://www.cdesignc.org/>
- The Urban Sustainable Forum, January 15, 6pm at Academy of Natural Sciences will look at green jobs and the green economy

Next Study Advisory Meetings:

Tuesday, March 31, 2009: Parts 3 and 4 – 10:00am to 1:00pm (with lunch)

Wednesday, June 17, 2009: The Complete Greater Philadelphia Food System Study – 10:00am to 1:00pm (with lunch)



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Announcements

The Enterprise Center

Kitchen Incubator Preliminary Designs Open House

Monday, December 15, 2008 – 6:15pm

The Enterprise Center

4548 Market Street

Philadelphia, PA

<http://www.theenterprisecenter.com/>

Philadelphia Urban Food and Fitness Alliance:

Governance Meeting

Monday, December 15, 2008 – 4:00pm to 7:00pm

University of Pennsylvania

3535 Market Street, Conference Room 4123

Philadelphia, PA 19104

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

Northeast Organic Farming Association of New Jersey (NOFA-NJ)

19th Annual Winter Conference

Saturday, January 31, 2009 – 7:30am to 5:00pm

Cook Campus Center, Rutgers University in New Brunswick

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

Pennsylvania Farm Show

January 10-15, 2009

Farm Show Complex and Expo Center, Harrisburg, PA

<http://www.agriculture.state.pa.us/farmshow/site/default.asp>

Pennsylvania Association for Sustainable Agriculture

18th Annual Conference

February 5th through 7th, 2009

State College, PA

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

Pennsylvania Horticultural Society

2009 Philadelphia Flower Show

March 1st through 8th, 2009

Philadelphia Convention Center

<http://www.theflowershow.com/>

New Jersey Conservation Foundation

Annual Land Conservation Rally

March 7, 2009

Hyatt Regency New Brunswick

<http://www.njconservation.org/rally/index.htm>



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Meeting Participants

Name	Affiliation
Rob Amsterdam	A.P.E., Inc.
Marilyn Anthony	Pennsylvania Association for Sustainable Agriculture
Claire Baker	Pennsylvania Horticultural Society
Steven Beckley	Delaware County Planning Department
John Byrnes	PSU Extension Office - Philadelphia
Cliff David	Heritage Conservancy
Kate Fitzgerald	Mother's Dot Market
Mami Hara	Wallace Roberts & Todd, LLC
Annie Jeurgens Behr	Warrington Community Garden in West Phila
Ann Karlen	White Dog Community Enterprises
Michelle Knapnik	Geraldine R. Dodge Foundation
Hillary Krummrich	Chester County Agricultural Development Council
Yael Lehman	The Food Trust
Sean Metrick	Montgomery County Planning Commission
Bob Pierson	Farm to City
Annie Rojas	White Dog Community Enterprises
Domenic Vitiello	Penn Design, Dept of City & Regional Planning
Nancy Weissman	Philadelphia Water Department
Walker Allen	DVRPC
Jessica Brown	DVRPC
Ted Dahlburg	DVRPC
Patty Elkis	DVRPC
Brett Fusco	DVRPC
Alison Hastings	DVRPC
Kim Korejko	DVRPC
Suzanne McCarthy	DVRPC
Amy Miller	DVRPC
Sarah Oaks	DVRPC
Natalia Olson	DVRPC
Guin Pascale	DVRPC
Barry Seymour	DVRPC
Amanda Wagner	DVRPC