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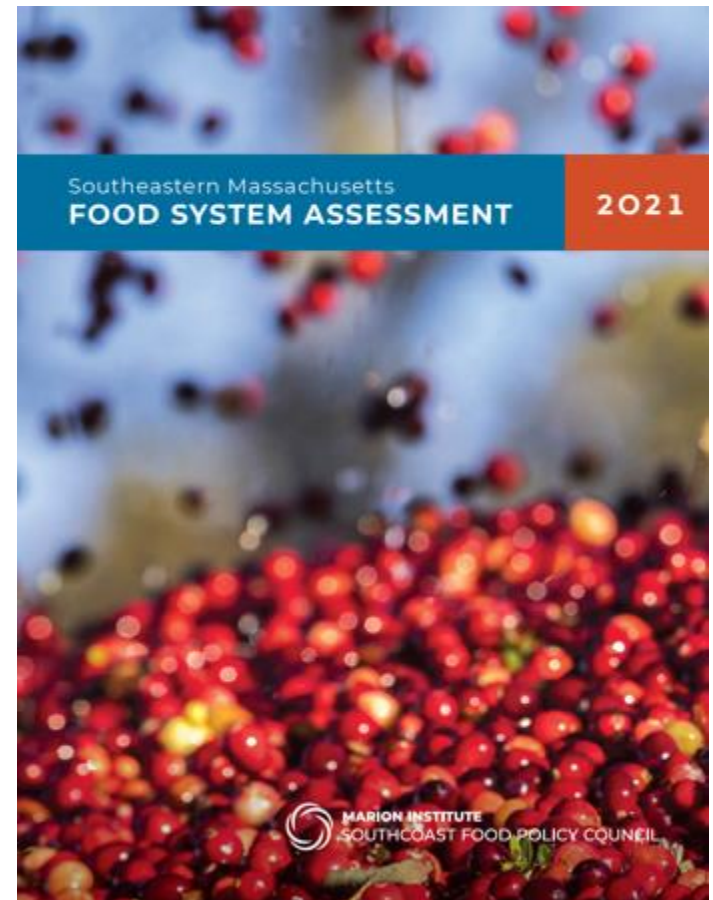
**GROW**  
EDUCATION

**GREENHOUSE**  
INITIATIVES

**SOUTHCOAST**  
FOOD POLICY COUNCIL

# Food System Assessment

<https://www.marioninstitute.org/programs/sfpc/food-system-assessment>



# Project Partners & Sponsors



## Marion Institute's Southcoast Food Policy Council

The Marion Institute's Southcoast Food Policy Council (SFPC) is guided by a mission to connect, convene, and advocate for local food producers, consumers, and community members who seek policy and systems that strengthen our regional food system, improve community health, and eliminate food insecurity. There are currently more than 300 members of the council, who represent community-based organizations, food relief and social service agencies, institutions, philanthropy, and food entrepreneurs and enterprises.



## Coastal Foodshed

The mission of Coastal Foodshed (CFS) is to strengthen the local food economy by making it easier for growers to sell, and consumers to buy healthy, affordable, local foods. Coastal Foodshed works to increase public awareness and knowledge of health, nutrition, and sustainable agriculture, and to improve access to food. CFS aggregates, transports, distributes, sells, and promotes local food through four main programs: New Bedford Farmers Markets, Mobile Farm Stand, Virtual Market, Learn to Love Local.



## Southeastern Massachusetts Agricultural Partnership

The Southeastern Massachusetts Agricultural Partnership (SEMAP) is dedicated to preserving and expanding access to local food and sustainable farming through research and education. As one of nine "buy local" groups in Massachusetts, SEMAP supports area farmers through resource sharing, networking events, legislative advocacy and technical assistance to navigate regulatory requirements like the Food Safety Modernization Act (FSMA).



# SFPC Community Advisory Board



- Adele Sands, Bristol County Agricultural High School
- John “Buddy” Andrade, Old Bedford Village Development Corp.
- Christine Sullivan, Coastline Elderly
- Courtney Shea, Southcoast Health
- Dale Leavitt Ph.D., Roger Williams University
- Darlene Dymsha, RDLDN, Greater New Bedford Community Health Center
- David Perry, Greater Fall River Community Food Pantry
- Deirdre Healy, UMass Dartmouth Office Leduc Center for Civic Engagement
- Emily Breen, Massachusetts Community Health and Healthy Aging Funds
- Erin Hovan, Rochester Resident
- Fran Hutchison, Massachusetts Senior Action Council
- Gioia Maria Persuitte, MPA, New Bedford Health Department
- Ian Abreu, City of New Bedford
- Ivan Brito, M.O. L.I.F.E., Inc.
- Jacob Miller, Senator Mark Montigny
- James McKeag, Mass Development
- Jowaun Gamble, Community Youth Empowerment
- Karen Schwalbe, SEMAP
- Leimary Llopiz, YWCA Southeastern MA
- Lisa Rahn, YMCA Southcoast
- Marissa Perez-Dormitzer, Greater New Bedford Regional Refuse Management District
- Pam Kuechler, PACE
- Peter Muise, Resident of Marion, Massachusetts
- Rob Shaheen, New Bedford Public Schools
- Sarah Labossiere, City of Fall River
- Stephanie Perks, Coastal Foodshed
- Stephanie Taylor, Martha's Vineyard Vegan Society Inc.
- Victoria Grasela, United Way of Greater New Bedford
- Wendy Garf-Lipp, United Neighbors of Fall River
- Liz Wiley, Marion Institute
- Christine Smith, Marion Institute

# Project Purpose

## Goals

1. Provide an updated landscape of the region's food system assets, incorporating broader primary research and food economy perspective.
2. Share progress since the 2014 assessment and current challenges.
3. Identify intervention points where policy can support an equitable and sustainable food system for all in the region.
4. Help raise awareness of Southeastern Massachusetts' context for contributing to statewide and New England food system planning work.

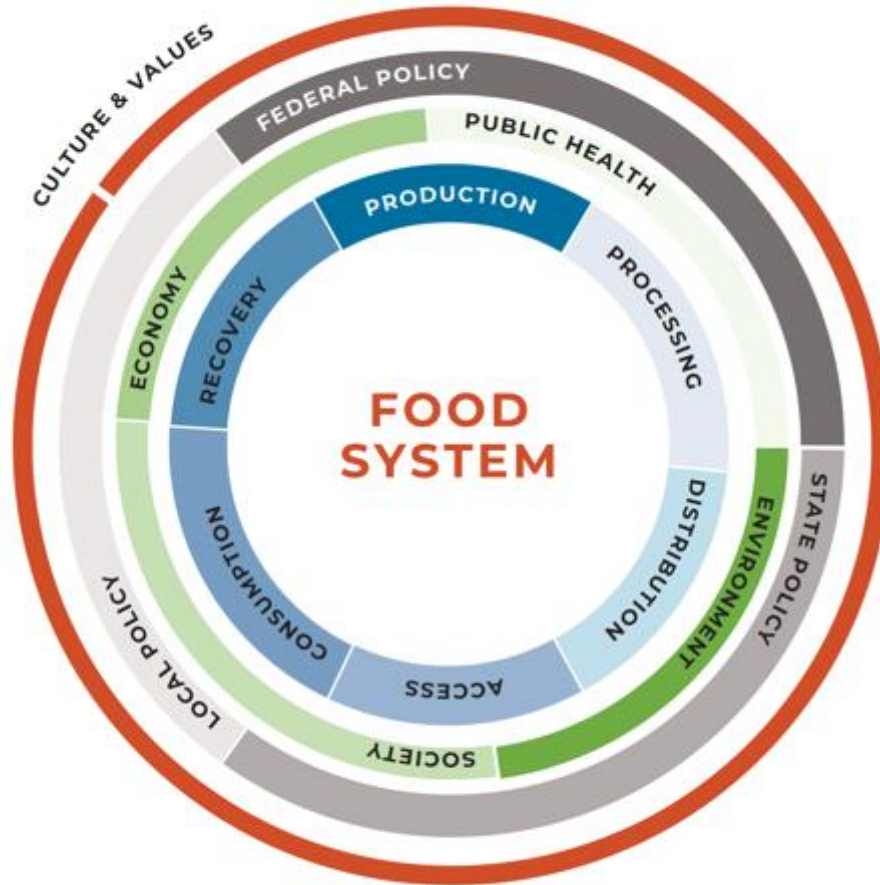
## Massachusetts Local Food Action Plan

1. Increase production, sales and consumption of Massachusetts-grown foods;
2. Create jobs and economic opportunity in food and farming, and improve the wages and skills of food system workers;
3. Protect the land and water needed to produce food, maximize environmental benefits from agriculture, and ensure food safety; and
4. Reduce hunger and food insecurity, increase the availability of healthy food to all residents, and reduce food waste.

# Key Definitions

- A **food system** comprises how our food is produced, processed and packaged, distributed, acquired, consumed and disposed of, or recovered. This structure includes all people, animals, organizations, and resources that work in an interconnected network to feed humanity.
- **Food Policy Councils (FPCs)** are organizations that look at the food system in their area, make recommendations, and take actions to improve that food system. FPCs key objectives are to: evaluate local food systems; provide collaborative solutions to system problems; increase coordination of food system resources; and advocate to create the needed changes.

# Food Policy Role



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The food system both impacts and is influenced by a variety of other factors and systems including the environment, public health, and the economy.

The benefit of a region having a local food policy council is that FPC's work in the outer levels of are focused on the long-term systemic changes that need to be addressed in order to elevate the direct services of the inner, direct services sectors (blue).



# Select Regional Demographics

	New Bedford	Fall River	Bristol	Plymouth	Norfolk	Massachusetts	United States
Population	95,239	89,388	561,037	515,303	700,437	6,850,553	324,697,795
Median Household Income	\$46,321	\$43,503	\$69,095	\$89,489	\$103,291	\$81,215	\$62,843
Poverty (children under 18)(%)	--	--	16.7	9.3	6	11.6	18.5
Poverty (%)	--	--	11.3	7.4	6.3	9.4	10.5
Total Households	38,888	38,456	217,912	187,460	265,300	2,617,497	120,756,048
Median Age	36.6	39.6	41	42.7	40.9	39.7	38.1
Education Attainment (%)	51.2	52.5	85.7	92.9	93.9	90.8	88
Foreign Born (%)	--	--	12.7	9.5	18.4	17.3	13.6
Race and Ethnicity (%)							
White	67.1	84.6	84.1	82.9	77.6	78.1	60.7
Black or African American	10.2	8.3	4.3	10	7.1	7.6	12.7
American Indian and Alaska Native	0.8	2.1	0.1	0.2	0.1	0.2	0.8
Asian Alone	2.0	2.1	2.3	1.4	11.1	6.6	5.5
Native Hawaiian and Pacific Islander	0.2	0.1	0.1	0.0	0.0	0.0	0.2
Other Race	25.8	7.5	6.2	3.3	1.7	4.8	4.9
Two or More Races	5.2	4.4	3	2.2	2.4	3.3	3.3
Hispanic or Latino	20.8	10.5	8.0	3.9	4.5	11.8	18.0

Just as there are clear differences among cities and towns within a single county, so too do neighborhoods vary within a given city or town.



## CHAPTER 1. Food Production & Harvest

### Key Takeaways

- Food production relies on both land and water resources and varies in scale from global commercial operations to backyard gardens.
- The total number of farms is in decline and prime agricultural land is threatened by development.
- Low profit margins mean many farms struggle financially. Established farmers still need support to sustain and grow their operations including access to affordable land, working capital, skilled labor, and technical assistance.
- Farmers and commercial fishers continue to age and lack of racial diversity in these occupations calls for increased attention to supporting both young and BIPOC individuals to gain access to the resources needed to start and/or operate a business.
- Climate change and unpredictable weather not only make it harder and more expensive to grow food, but threaten food traditions, supply, and the local economy.
- Over reliance on too few crops could prove devastating to the local economy should any one or combination of them fail or lose market demand for a sustained period of time.
- Research and resident education could help foster consumer demand for more diverse regional products. Producers need markets and methods to increase wholesale and direct-to-consumer sales of locally harvested products, especially landed fish and aquaculture species.
- Urban agriculture remains nascent in a region with a number of densely populated centers ripe for increased green, productive space.
- Community-based food production could be supported and scaled through the adoption of progressive urban agriculture ordinances and resident education.

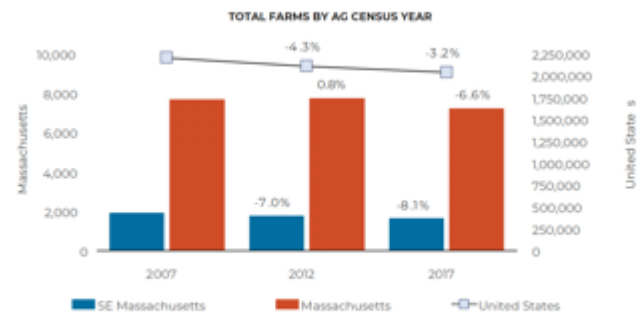
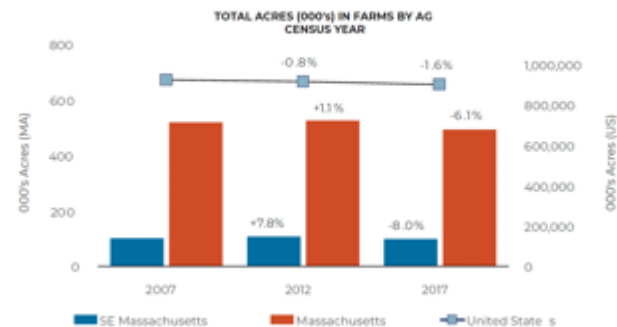


FIGURE 6. TOTAL LAND IN FARMS, 2007-2017  
SOURCE: UNITED STATES 2017 CENSUS OF AGRICULTURE



# Food System Assessment

## Production / Harvesting



TOTAL LAND IN FARMS **99,688** ACRES  
(-8.0% from 2012)

AVERAGE FARM SIZE **61** ACRES

# Food System Assessment

REGION'S AGRICULTURAL  
PRODUCTS BY CATEGORY:

TOTAL MARKET VALUE OF  
AGRICULTURAL PRODUCTS: **\$118.5 MILLION**  
(\$9.7 MILLION ORGANIC SALES)

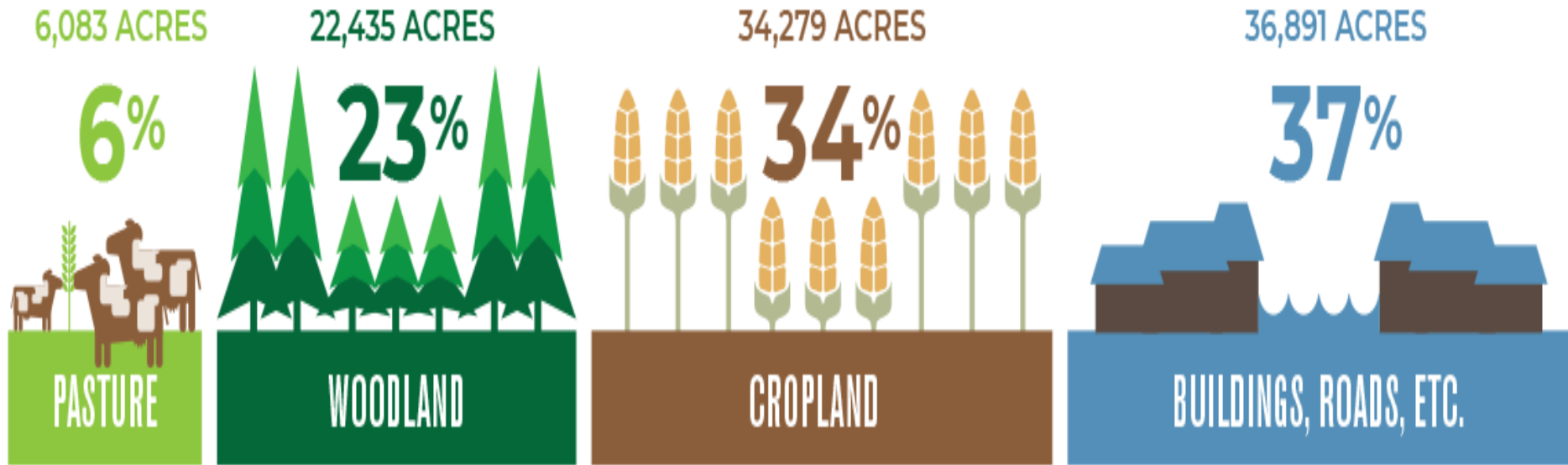


**TOP CROPS:** Berries (specifically cranberries),  
Forage, Corn, and Vegetables

**TOP LIVESTOCK:** Layers, broilers/other  
meat-type chickens, and cattle/calves

# Food System Assessment

## USE OF LAND IN FARMS:



12,422 acres (36%) in cranberries across 310 farms  
3,648 acres idle (71% increase over 2012)

# Food System Assessment

## FISHERIES:

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**32,637**  
BOAT TRIPS



**571,953,330** LBS  
SEAFOOD LANDED



**\$469,763,709**  
VALUE

## CHAPTER 2. Food Processing & Distribution

### Key Takeaways

- There is significant processing capacity on the Southcoast for fish and seafood, but the scale of these facilities is not adapted to smaller food businesses.
- Animal slaughtering capacity, especially for smaller species (e.g., chickens, rabbits), remains a potential supply chain constraint despite additional infrastructure developed since the last regional food system assessment in 2014.
- There are two well-established commercial kitchens available to the region and still interest by growers for value-added production capacity and infrastructure.
- A survey of 43 local farmers and producers shows willingness to pay for several food hub related services including point to point delivery and product aggregation to reach additional markets.
- The distribution sector continues to experience acquisitions of regional companies and witness consolidation concentrated in national broadliners.



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MEATWORKS  
OF SOUTHERN NEW ENGLAND



Mobile  
Farm Stand



COASTAL  
FOODSHED



Virtual  
Market



NB Farmer's  
Market

## CHAPTER 3. Food Access And Consumption

### Key Takeaways

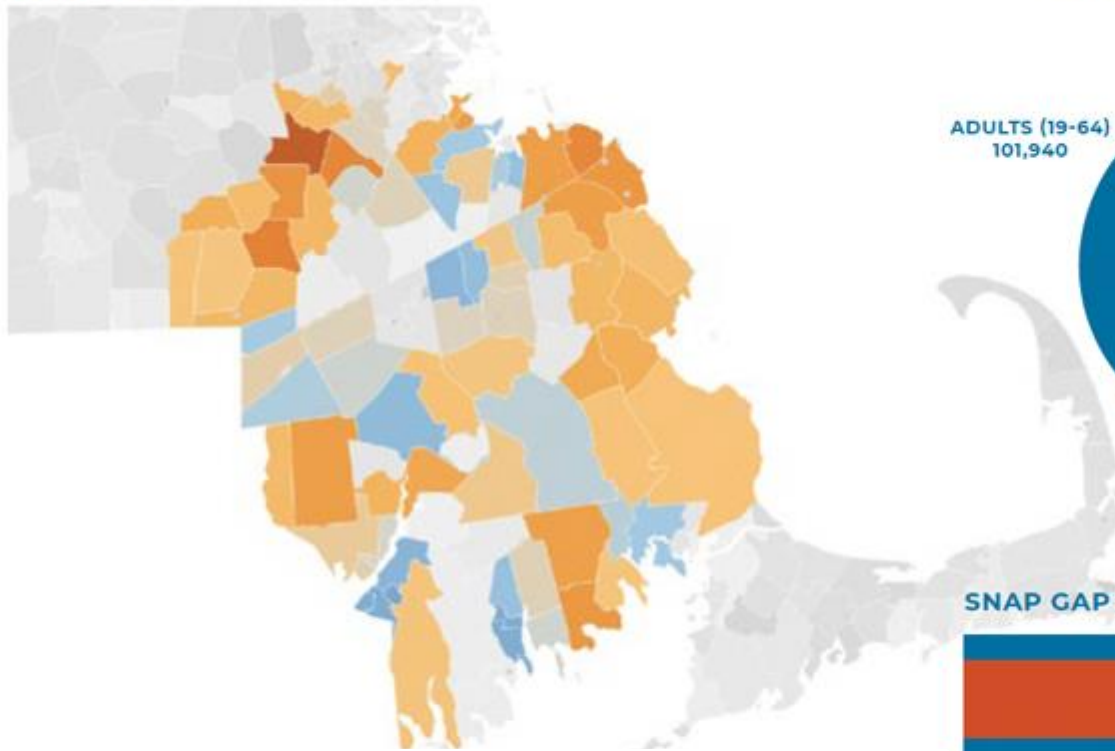
- In Southeastern Massachusetts, residents surveyed rely primarily on grocery stores and big box stores for their food at home (80%).
- 19% of census tracts in Southeastern Massachusetts are rated as low-income/low-access, where a significant number or share of residents is more than 1 mile (urban) or 20 miles (rural) from the nearest supermarket and where more than 100 housing units do not have access to a vehicle and are more than a ½ mile from the nearest supermarket.
- Consumers surveyed in the region often or sometimes experienced food running out before there was money to buy more over the past 12 months.
- Affordable meat and seafood and then fresh fruits and vegetables are considered the "hardest to get food items" for regional consumers.
- Participation in the federal government's Supplemental Nutrition Assistance Program (SNAP) participation has risen across Southeastern Massachusetts by 9.4% since 2014.
- The difference between those eligible for SNAP and those using the benefit is 45% or an estimated 163,307 individuals.
- The Healthy Incentives Program (HIP) is a valuable program, but regionally underutilized, that provides additional funding to SNAP eligible families and supports local farms with targeted spending on fresh fruits and vegetables through direct to consumer channels. More educational tools for farmers to share with their customers would be valuable.
- Consumers in the region would welcome more fresh, locally grown food via community gardens, farmers markets, and grocery stores.

### Consumers would like more ...

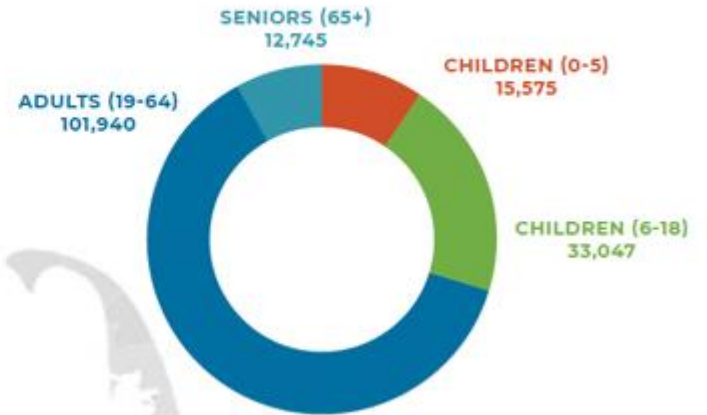
Farmers markets / farm stands / support for farmers	23
Consumer awareness and education tools	17
Affordable fresh food	16
Community gardens	15
Transportation to/from food	12
Local food in grocery stores	9
Grocery stores/smaller markets	6
Acceptance of SNAP/EBT/WIC/HIP	5

# SNAP GAP

SNAP GAP %



SNAP GAP AGE BREAKDOWN



SNAP GAP TOTAL



SNAP ENROLLED: 196,912  
 TOTAL SNAP ELIGIBLE: 360,219  
 SNAP GAP: 163,307 (45%)

FOOD INSECURITY

County	Overall	Children
BRISTOL	Overall 9.8%, 54,720 people	Children 12.1%, 14,060 children
NORFOLK	Overall 5.9%, 41,100 people	Children 4.6%, 6,810 children
PLYMOUTH	Overall 6.1%, 31,400 people	Children 7.7%, 8,640 children

Average meal cost (three county average): **\$3.84**



# Food System Assessment: Access

<https://foodfinder.marioninstitute.org>

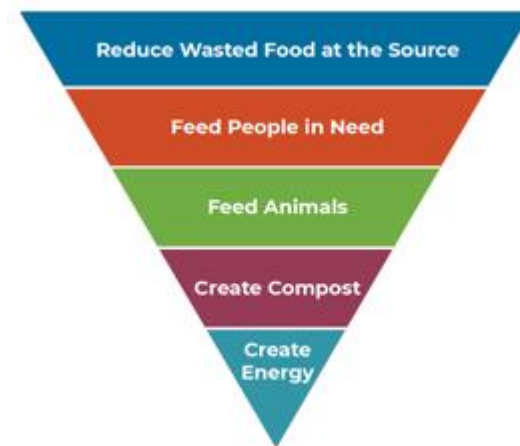
**The Marion Institute's Southcoast Food Policy Council's Food Finder is a web-based app to use from phone or computer to find any kind of food, food pantries, soup kitchens, farmers markets, farms, farm stands, mobile farm markets, specialty stores and it shows who takes SNAP, HIP, WIC, senior farmers market coupons.**

**Food Finder is the result of collaboration with UMass Dartmouth Professor Tim Shea, Deirdre Healy at the Leduc Center for Civic Engagement, Paul Constantine and Vorn Mom from Moonberry Tech.**

## CHAPTER 4. Food Loss & Waste Reduction, Recovery, and Recycling

### Key Takeaways

- Reducing organic waste and increasing food recovery benefits local people, the environment, and the economy.
- Since 2014, the Commonwealth's organics waste ban has helped defer an estimated 1.5 million tons of food.
- Food rescued and/or donated has increased 30% since 2014 and food waste collection has more than doubled in the same period of time (currently 2,900 customers statewide).
- There are 12 operations in Southeastern Massachusetts that accept diverted food material.
- There are several municipal strategies available to Southeastern Massachusetts households to assist with residential composting to reduce organic waste and greenhouse gas emissions.
- Gleaning activity remains nascent in Southeastern Massachusetts, yet represents an opportunity to help farmers retain crop value and make more local food available to the community.
- Consumer education about product labeling could greatly reduce food waste.
- Increased awareness of protections for those donating food would prevent waste and help feed those in need.



# Food System Assessment

## Food Loss & Waste Reduction, Recovery, and Recycling

**1/3** PRODUCE GROWN IN THE  
U.S. REMAINS IN THE FIELD

**12** SITES SUPPORT DIVERTING ORGANIC  
FOOD MATERIALS FROM THE LANDFILL

**30** COMMUNITIES WITH A  
COMPOST BIN PROGRAM



**As of 2017, the MA  
Organics Waste Ban  
had been credited with:**

500 jobs in the state (150% increase since 2010)

1.5 million tons of food waste diverted since inception of the ban

30% increase in food rescued and/or donated

2x food waste collection rate (currently 2,900 customers statewide,  
with at least 7% participation in the Southeastern Massachusetts region)

## CHAPTER 5. Local Food Economy

### Key Takeaways

- The local food economy is driven by numerous direct and indirect inputs across the food value chain.
- There are over 11,000 total food and beverage stores, food services and drinking places, food manufacturing businesses, and agriculture, forestry, fishing and hunting entities in the region.
- The sectors listed contribute \$5.7 billion in direct wages to the state's overall \$15.7 billion direct wages.
- Average monthly employment across these sectors in the region is 208,871.
- The food services and drinking places sector contributes the most to the local food economy in terms of number of businesses, total wages, and average employment, yet its average weekly salaries are consistently below the other sectors.
- Impacts to the food services sector disproportionately affect Latinos.
- Restaurants and other food service establishments are struggling to fill available positions due to a national labor shortage and wage competition.
- Federal and state economic stimulus packages may help food businesses recover from setbacks caused by the COVID-19 pandemic.

- Total number of food and beverage stores: 2,406
- Total number of food services and drinking places: 7,364
- Total number of food manufacturing businesses: 388
- Total number of agriculture, forestry, fishing and hunting entities: 940
- Total wages: \$5.7 Billion
- Average monthly employment: 208,871

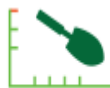
# Food System Assessment: Economy

## FARM LABOR:



**DECREASED 14%**

From 2012 to 2017, the number of farms hiring labor decreased from 695 to 595 (-14%)



**DECREASED 18%**

The number of workers decreased from 3,371 to 2,763 (-18%)



**DOWN 3%**

Wages paid were down to \$39,350,000 from \$40,729,000 (-3%)



**36% vs 39%**

Only 36% of farms in the region reported hiring farm labor in 2017 versus 39% in 2012



**25%**

The Southeastern Massachusetts Region represented roughly 21% of all hired farm labor in the state of Massachusetts during the 2017 Census of Agriculture, accounting for nearly 25% of all farm wages statewide.



**1 IN 4**

Of the 2,367 farms hiring labor across the state, approximately one in four were located in the region.

## CHAPTER 6. Food System Regulations & Policy Horizon

### Key Takeaways

- Conservation of working lands is vital to ensuring local food system resiliency. Development should avoid prime agricultural soils and policy should help keep farmland affordable and in production.
- State legislation aimed at increasing economic opportunity through higher minimum wage earnings may stretch those who grow, process, and deliver food to consumers to afford labor without raising the cost of food.
- Maintaining working lands is an important strategy for farmers, consumers, economic development, and climate change mitigation.
- Addressing food security and access is a priority for promoting health equity. A program like HIP that enables increased access to fresh fruits and vegetables for low-income households, while supporting local farmers, is critical.
- New national food loss and waste policy recommendations have the potential to expand successful food waste diversion programs and services, enhance consumer education on household food waste reduction strategies, and enable more food to flow to consumers by resolving misunderstandings caused by current product date labeling.

- Access to land and land tenure
- Preservation of prime agricultural land
- Tax implications for small agricultural parcels
- Right to farm laws
- Climate change mitigation
- Soil health
- Minimum wage mandates and labor
- Food access, food justice, and health equity
- Consumer and institutional local food purchasing incentives
- Expanded food loss reduction and recovery strategies

# Contact information

Have ideas?

See opportunities for policy to improve the food system or address other determinants of food access, security, and public health? We would love to hear from you.

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