Greenville Area food system assessment

Greenville Area Food System Assessment

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Executive Summary

The Greenville County Community Planning and Development Department collaborated with two dozen local, State and federal partners to assess the current state of the local food system. With a focus on economic development objectives from the Imagine Greenville County comprehensive plan, this year-long process observed aspects of producers, distributors, processors, retailers, recyclers and consumers that make up a $1.1 billion industry in Greenville County alone (per. comm. Hughes 2012). Through forums, interviews, and site visits, the main challenges to growing the system were identified as marketing, processing capacity, cost of land and water, certifications/ regulations, and labor.

Our food system partners who teamed up and helped direct this assessment provide a wide range of services at different scales of the local food system. The food system, in general, may be able to better capitalize on these services in order to increase entrepreneurial activity, jobs, average wages, food security, and potential exports. However, the coordination of these partners and how they move together to make a more robust food system is a logical 'next step' to maximizing local profit capture.

A food system plan is being prescribed in this assessment to set goals for the food system, create a timeline to reach milestones, address challenges systematically together by pairing partners to tasks, aid as a reference for new and expanding businesses, and highlight research opportunities that may support future grant funding and venture capital opportunities.

Greenville County is in an ideal position to take the lead on this project as a key stakeholder in the future success of the local food economy. Partnering entities equally have important roles to fulfill; however, a significant responsibility of local governments is to create policy and provide support that enables greater economic activity for its residents. Further, policies can help enable work by non-profit organizations, open research opportunities for local universities, and promote entrepreneurship in the community.

Formal Introductions

Significant economic potential exists to build a more vibrant and robust agri-business industry in the Greenville area. Since May 2011, the Greenville County (GC) planning staff interacted with many players in the food system. We found critical farm and consumer activity, dedication to local restaurants, dynamic local food grocers, a growing local Slow Foods movement, and lively farmers' markets. Local media has also recognized and capitalized on the importance of local foods, resulting in a new local magazine initiative with a growing readership.

The assessment of the local food system is centered on Greenville County with the consideration that many products are grown in neighboring counties and sold to Greenvillians through various avenues including farmers markets, grocers and restaurants. The term 'local' in reference to food systems conjures as many definitions as there are localities but we maintain this intention of the term: providing the freshest food to the table from the shortest distance.

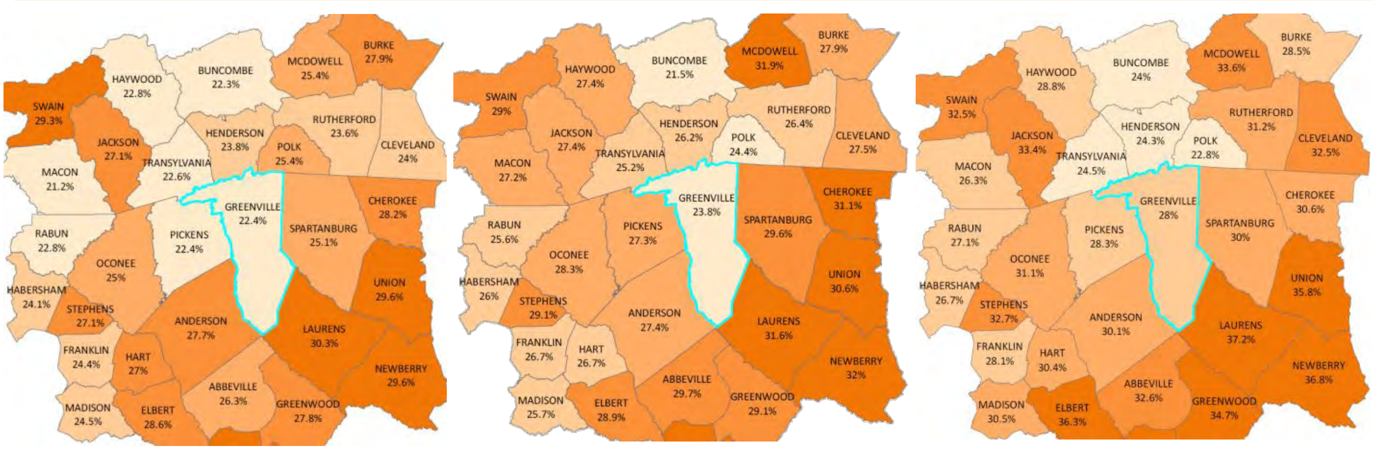
This assessment, like many nationwide, identifies challenges to the local food system (diagramed on page 22). For the purposes of this assessment, we focus on the functional classes that make up the system: producers (farmers), distributors/storage (hubs), processors, retail outlets, recyclers and consumers.

When intermediated sales (locally grown food sold to a grocery store, restaurant, or distributor) are combined with farmers' direct-to-consumer sales, the size of the U.S. local food market was $4.8 billion in 2008.

(Low and Vogel 2011)

Before focusing on these challenges, observations of the population's health trends show an increasing need for healthy food. Health concerns that are generally attributed

Figure 1. Age adjusted percentage of obesity in adults living in the Greenville area. (Source: CDC)



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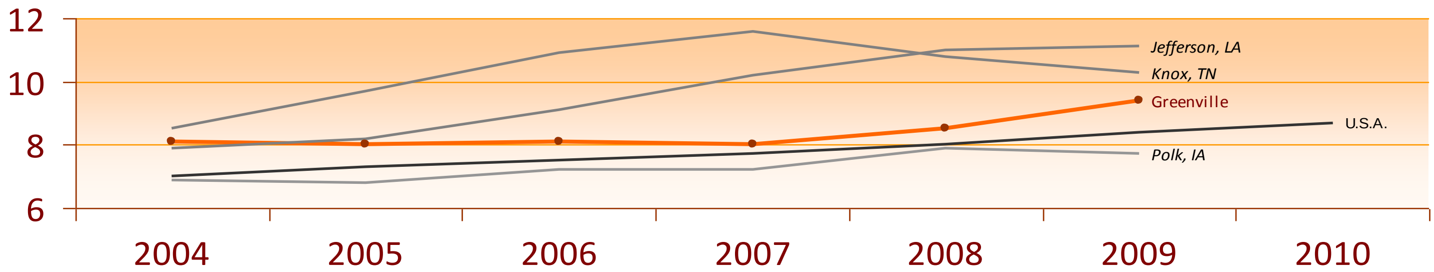


Figure 2. Percentage of adults with diabetes, age adjusted, including similarly sized county and national levels. (Source: CDC)

to unhealthy diets are documented and geographically analyzed. Figure 1 and Figure 2 show general health trends obesity and diabetes, respectively, among adults. Although Greenville County maintains a rate relatively lower than some neighboring Appalachian counties, over time, the county displays an increasing intensity of these health concerns. Further, Greenville County's rate and acceleration of diabetes are higher than the national trends.

At the county level, significant limitations to accessing healthy foods exist. The United States Department of

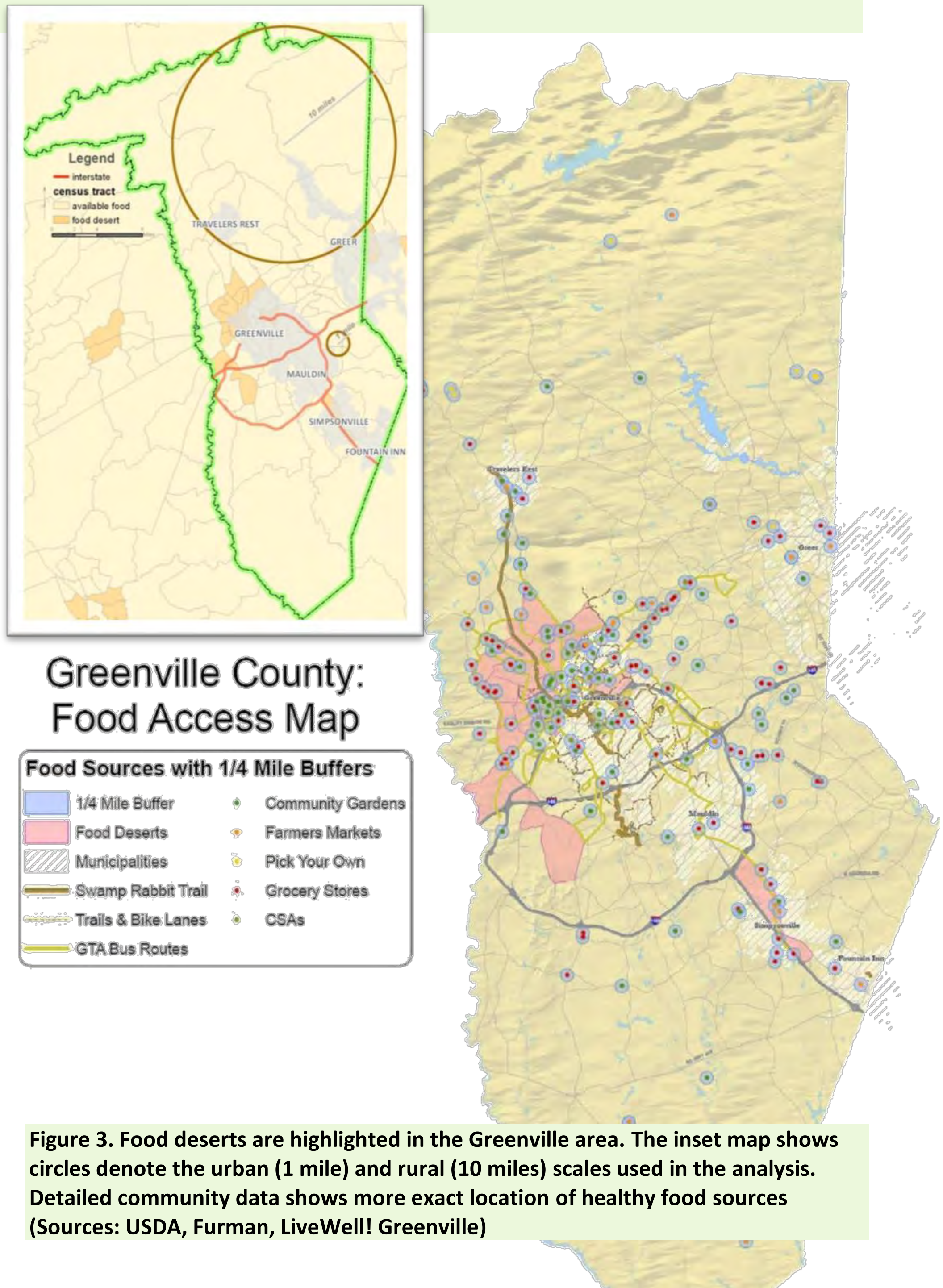


Figure 3. Food deserts are highlighted in the Greenville area. The inset map shows circles denote the urban (1 mile) and rural (10 miles) scales used in the analysis. Detailed community data shows more exact location of healthy food sources (Sources: USDA, Furman, LiveWell! Greenville)

Agriculture (USDA) shows locations of food deserts (Figure 3): areas with little access to health foods based on proximity to grocers and availability of transportation. The USDA defines a food desert differently in an urban versus a rural setting – a 1 mile or 10 mile proximity, respectively. In order to determine methodology to address food deserts, a more specific investigation of specific grocers and distances is necessary. Figure 3 is a good example of an initiative by Furman University and LiveWell! Greenville that is focusing on food availability, especially in areas considered food deserts.

Figure 4. Question posed to local retailers: Is there enough local food sources to find what you need? (Source: GC)

In It Together

A long list of active partners have come together to address these health concerns as well as work towards a stronger local food system. These partners have a wide range of responsibilities and service areas that reflect both the diversity of the food system as well as the potential scope. Each member was integral in the compilation of this assessment. Throughout this document, the collective 'we' is used to represent this team effort. The following groups are among the stewards of a healthier food system with missions focused at these various scales:

Statewide

- Carolina Farm Stewardship Association
- Clemson Institute of Economic and Community Development, CIECD
- Clemson Extension
- SC Department of Agriculture
- SC Department of Commerce
- Department of Health and Environmental Control
- Lowcountry Local First
- Grow Food Carolina

Upstate Region

- Furman University
- Appalachian Regional Commission
- Appalachian Council of Governments
- Edible Upcountry
- Clemson University Small Business Development Center, SBDC
- Greenville State Farmer's Market
- Hub City Farmers' Market
- Piedmont Healthcare Foundation

County

- Greenville County Schools
- Greenville Forward
- LiveWell! Greenville
- Greenville County Redevelopment Authority
- Greater Greenville Sanitation Commission's GreenWaste Program

City/ Neighborhood

- Slow Food Upstate
- Gardening for Good (Greenville Forward)
- Bon Secours St. Francis Hospital
- Greenville Organic Food Organization, GOFO
- City of Fountain Inn's Farmers Market

Bottom Line

A healthy, robust food system will lead to a wide range of benefits:

- Increased entrepreneurial opportunities
- Increased job opportunities
- Increased pay rate
- Increased food security
- Increased access to healthy food
- Locally grown with potential to export

Figure 5. Spice of Life booth, partner banners, consumer survey. (Source: GC)

Although during the assessment we encountered a diverse group of stakeholders, persistent challenges existed within each group. Furthermore, examples of overcoming these challenges exist among members within the system, whom are subsequently enjoying great success with their business. Learning from and adapting techniques may help strengthen the overall food system. The return on investing in these actions could be a focus of a broader plan.

Figure 6. Tom Trantham out standing in his field at Happy Cow Creamery, showing the fruits of the 12 Aprils forage program. (Source: GC)

Walking and Talking

This assessment of the Greenville County food system could be considered a 360 degree review of the industry. Based loosely on the American Planning Association's "Policy Guide on Community and Regional Food Planning" (APA 2007), we considered challenges to individual functional classes via various methodology including online surveys, brainstorming discussion, field visits and one-on-one discussions.

We attempted to gain feedback from representatives of all sectors through various meetings and mediums. Partners, whose missions direct activities at various portions of the food system, were invited to an initial planning meeting in May 2011. This meeting set the pace and scope for the assessment. Shortly thereafter, two forums were scheduled to poll and discuss industry challenges for producers and retailers. The local food producers met during a couple of meetings in August 2011 with follow-up farm tours in October and November. Retailers, including farmers' market managers, met in November, for a brainstorming session. Later that month, an individual meeting was scheduled to tour the operations of a local distributor. Finally, we attended and surveyed consumers at the Spice of Life fest in March 2012.

Figure 7. Dale Hawkins, owner of Fish Hawk Acres, was an invited speaker to the Appalachian Regional Commission's "Growing the Food Economy" presentation at Furman University in January 2012. (Source: GC)

In the meantime, we were invitated to serve on various advisory committees including Clemson University's Sustainable Agriculture Research and Education program, Greenville Forward's Gardening for Good, and LiveWell! Greenville's Access to Healthy Food subcommittee. Furthermore, we participated in a food-focused housing panel sponsored by the Greenville Housing Fund as well as a Health Impact Assessment Presentation by the South Carolina Institute of Medicine and Public Health.

Another important regional forum occurred in December 2011 that confirmed the results of our earlier observations. This conference, shown in Figure 7, was sponsored by the Appalachian Regional Commission (ARC), a federal agency focused on economic development in the 13 state Appalachian region. Before this assessment began, the ARC was in the midst of a similar, albeit more encompassing, study of the challenges facing the larger Appalachian region food system. Fortuitously, our assessment coincided well with the timing of their conference scheduled for the Upstate region. The "Growing the Food Economy" forum, held at Furman University, had a similar focus to our sector forums with comparable results. The subsequent relationship and support from the ARC staff, their appointed official, contractors, and connections reinforced observations made in this assessment. Mutually, the ARC stated they were interested in further developing the food system in the Upstate. A food system plan would outline the local priorities.

Making Lemonade

This assessment determined that significant challenges exist to the local food system. The challenge, however, for the subsequent plan, is to gather solution-makers and produce a viable timeframe to address those challenges. The worst case scenario may be an inconsistently supplied food supply system that buckles under new federal regulations. The alternative is a diverse cluster of gradual and ever-expanding entrepreneurs that maintains a stable, secure, and viable supply of fresh food that ultimately moves into exports to regional, interstate and international consumers.

As a result of the meetings throughout the assessment, the following list was compiled of reoccurring challenges: basic information sharing, connecting farmers to retail establishments, meeting consumer demand, storage and distribution, marketing, processing capacity for value-added products, price of land and water, federal and state regulations, and labor. The first four topics are secondary concerns and will be discussed following the next section. The last five issues are more systemic and have immediate needs to address and will be the focus of the next section.

Challenges

The following topics consist of the most significant challenges identified throughout this assessment process. These challenges affected one or more of the different facets of the food system, with many being inter-related. Addressing these challenges will be successful through the cooperation of the dozens of partners whom have already dedicated resources to this assessment.

Marketing

Marketing is important to any sector interested in selling a product. The producer has the most options available because they have the widest market base they can choose to sell to: distributors, processors, grocers, farmers' markets, community supported agriculture (CSA), and other direct-to-the-consumer sales including mail order. This position also affords the ability to maximize share of the retail price of products (Figure 9). Matching any business, especially the producers', with the most effective marketing strategy is nonetheless very challenging. From the producer's perspective, marketing is often an unwelcome task when they would rather focus their attention on the farm.

Current observations show those business owners whom neglect the marketing aspects of the business ultimately rely on the consumers to seek the business, often facilitated by word-of-mouth advertising. This approach may be effective for the more established businesses, but for those in the beginning years, a unique and multi-faceted marketing strategy may be necessary to win business. Combining a well-established business with a renewed market strategy, like vending at farmers markets as shown in Figure 8, may result in further capture of market share.

Many community partners exist that help facilitate the development of the marketing plan for businesses. One entity in particular, and a partner to this assessment, is Clemson University's Small Business Development Center (SBDC) located in downtown Greenville. This team of professionals is available to review and help develop business plans. Their emphasis is for each business to have a plan that includes a detailed market

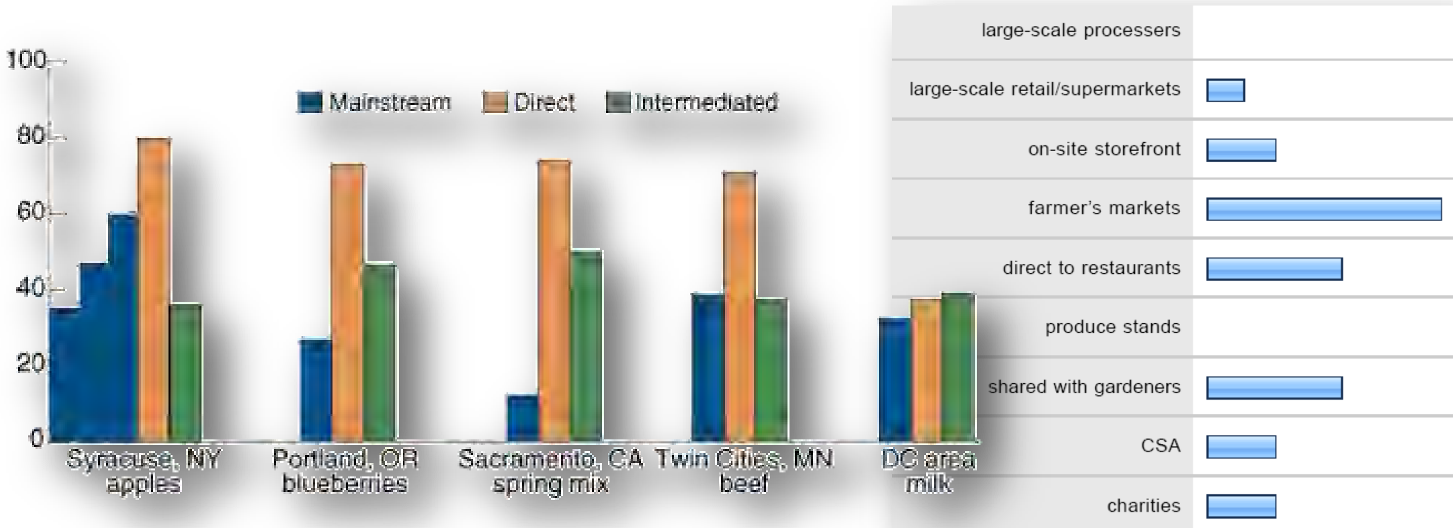


Figure 9. Producers in direct marketing supply chains in 2009 retained highest share of retail price (left graphic, Hand 2010, USDA-ERS). Our 2011 survey results of marketing strategies by Greenville area farmers. (right graphic, Source: GC)

analysis. The SBDC regularly offers courses that help businesses (new and existing) with completing these studies.

Ideally, entrepreneurs would have a business plan that outlines potential clients. The plan would address where the clients are located, what they are willing to pay for the business's product (i.e. wholesale vs. retail) and the potential volume of sales anticipated. The plan could also be used as a tool for attracting funding. The result, from a retailer's

Figure 8. City of Greenville's Saturday Farmer's Market downtown. (Source: GC)

perspective, may be a mix of products local and imported (Figure 10).

Compiling the business plan could take as little as weeks to as long as months to compile depending on its complexity and anticipated funding strategy. The courses offered through the SBDC often review scenarios, include invited topical speakers, and meet regularly over a period of months.

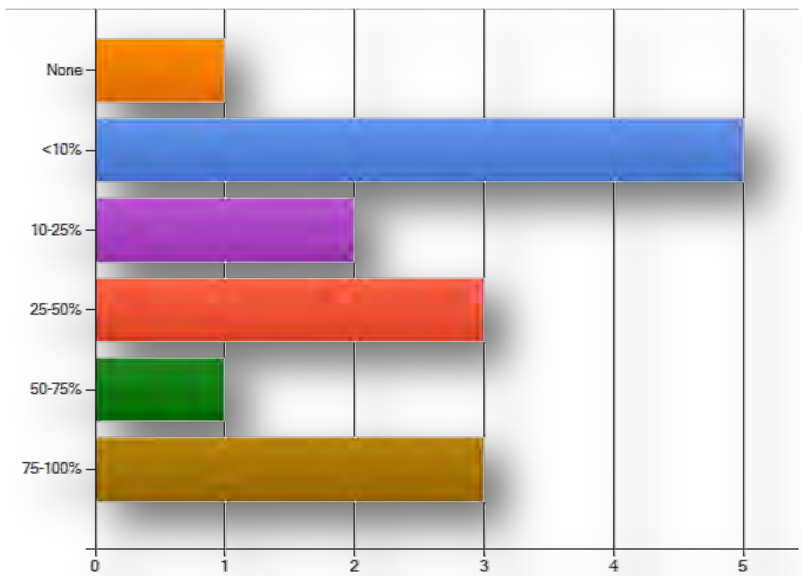


Figure 10. Retailers were asked in a local survey what percentage of their purchases was value-added and locally produced. (Source: GC)

In addition to the SBDC, there are other potential resources for new and expanding businesses. Local chambers of commerce often have resources available to grow a local business. Some church communities and non-profit organizations also exist with missions that emphasize growing local food businesses.

The challenges associated with marketing local foods are familiar to the South Carolina Department of Agriculture (SCDA). Identified as a statewide issue, SCDA initiated programs to help get the word out about locally produced foods and now has many programs that are focused on promoting locally grown food to different markets. The Certified South Carolina program, with its '*Nothing Fresher. Nothing Finer.*' slogan, is an effort to brand and promote South Carolina products. In addition, the second phase of this program is the Fresh on the Menu program that focuses on promoting restaurants that use at least 25% local products and produce. Its slogan is "Locally grown. It's to dine for." Furthermore, SCDA has a certified roadside market program. All of these programs, descriptions and lists of participants can be viewed on a dedicated website (www.certifiedscgrown.com).

Processing

Producing value-added products is a significant task towards making a robust local food system. Processing allows for producers and other facets of food system alike to share in larger markets and possibly over longer periods of time. For example, cabbage could be processed into slaw as a value-added product, and then preserved through pickling into chow-chow. Throughout the period of this assessment, businesses using food services including schools, hospitals, universities, and restaurants have made greater strides towards procuring a greater percentage of local products, some of which are value-added.

One of the main challenges to the processing facet is that local processing locations are being consolidated leaving those with raw goods a longer travel time from production facilities (i.e. farms). Many new businesses with a new product to develop often travel to the Blue Ridge Ventures processing facility in Asheville, North Carolina where production and marketing help is available. Meat processing is also seeing a consolidation with only a few remaining processing facilities in the Carolinas.

Figure 11. A food processing plant in Simpsonville. (Source: GC)

Ultimately, if processing facilities cease to exist within our area, then the shrinking access to certified processing facilities may limit the number and scope of new start-ups and expansion of existing businesses. However, alternatives to formal processing facilities may exist, albeit limited in capacity and availability. For instance, local restaurants generally include certified kitchens as part of the restaurant business. These kitchens may also be used to process value added products.

In one such local example, a new local bakery company was using the soup kitchen during off-peak times to make breads. Although the hours were a challenge, this company has grown and purchased a building of their own to continue to grow the business. Existing infrastructure may act as incubators for more new businesses. Existing vacant restaurant space may serve a similar purpose.

It would take minimal time for local certified professional kitchens to be enlisted as a potential off-shift production facility. An inventory of available kitchens could be made available making a well-established system of potential processing capacity. Of course, the kitchen owners would need to maintain the appropriate certifications and agree to the usage.

Increasing processing capacity in the Greenville area may take many forms. A synergistic approach to processing and marketing similar to those activities at Blue Ridge Ventures in Asheville may increase the number of local small business start-ups. A feasibility study for that type of operation should be included in the Food System Plan. The SC Department of Agriculture has already expressed interest in further developing the Greenville State Farmers Market. And since this issue is seen statewide, Clemson

University has compiled a survey that polls the interest across South Carolina for an incubator kitchen.

Another recent development that will help increase processing capacity is a new South Carolina law. In June 2012, the governor signed into law provisions for home based food production (Section 44-1-143), known by some as the South Carolina Cottage Food Law. The law specifies such topics including the extent of how items can be sold, in what quantities before triggering a DHEC inspection, packaging and labeling requirements, and a list of necessary ancillary facilities.

Land and Water Cost

Higher land costs may limit the amount of farmers that can afford to establish in particular areas. Many farmers utilize family-owned lands that have been inherited from prior generations. New farmers have limited land prospects near population centers that are affordable and of significant sizes.

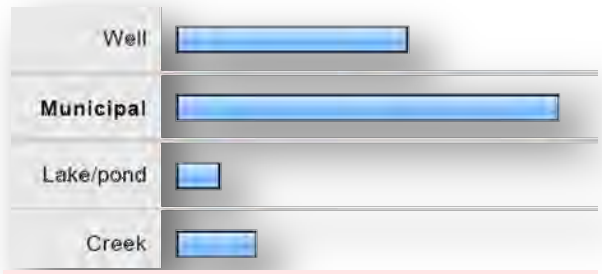


Figure 12. Local survey results for water sources on select farms. Water availability and costs have significant effects on a successful farming business. (Source: GC)

Figure 13. Buffalo Farms owner, John Zaugg, showing the herd a little love. (Source: GC)

Farm lands have historically been replaced by homes. The highest and best use has traditionally been a suburban development including residential and commercial uses together with the associated infrastructure (roads, water, sewer, fire and police protection, stormwater management, etc.) Greenville County has higher taxes than surrounding counties and may be losing the farm land use to more affordable areas.

Farms may be chased away from high population areas because of the incompatible 'highest and best' use as determined by market pressures. Farms have traditionally catered to supplying a national or global commodity, often overlooking the potential local market. This disconnect to the proximity of potential customers and its potential saving in transportation costs has resulted in devalued farming as a highest and best use of property near population centers.

If the farm could diversify its business plan to include services for nearby residents or high population areas (cities and towns) then the farm's inherent value may increase.

Generalized commodity farming can technically be located anywhere the farmer can find arable land and where produce can be delivered to a centralized broker/ distribution location. The opposite is also true: a farmer interested in servicing a local population with food should also consider more expensive land if other costs would be mitigated – like the cost to transport the product to market, proximity to other marketing or processing tools. Furthermore, new methods of intense farming practices may increase yield, thus precluding the need for larger tracts of land (or substantiating more expensive tracts).

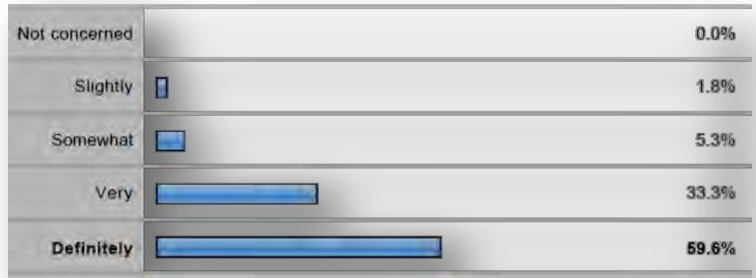


Figure 14. Consumers at the 2012 Spice of Life fest were asked how concerned they were about the safety of their food. (Source: GC)

These new strategies can be adopted quickly. Business strategies can change rapidly to fit with current land values and incorporate new farming techniques that would maximize profits on limited sized parcels. Across the nation, there are land link programs which find younger farmers to take over operations from those retiring from the industry (ex. Center for Rural Affairs - Lyons, NE).

Entities exist that could help to implement these changes. Clemson and Furman universities may be able to develop programs that can focus on maximizing the viability of farms in an urban setting. The Small Business development center could verify a good investment decision with the availability of appropriate data (land cost, labor, business expenses, and projected profits). Further, the SCDA is interested in investigating the differences between two main farming models: growing commodity crops (i.e. wheat, corn, cotton, soybean, etc.) or diversifying the crops to include produce for local consumption. The next question would be what size farm would be ideal for the Upstate considering land costs and the other challenges identified in this assessment.

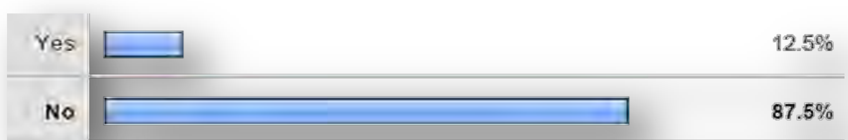


Figure 15. Local survey: Is your farm certified organic? (Source: GC)

Certifications/ Regulations

Everyone wants to know that the food they eat is safe and of the best quality (Figure 16). One of the ways to

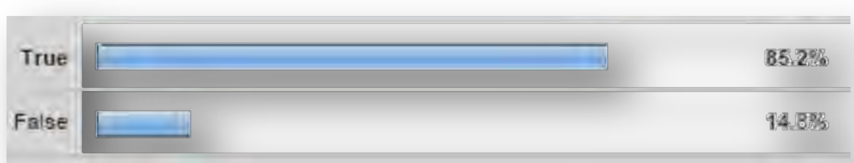


Figure 16. A local survey of consumers asked if they have stopped buying a brand they heard was acting irresponsible or unethical. (Source: GC)

communicate this to the consumer is through certifications such as ‘organic’, ‘humanely treated’, ‘no pesticides’ and ‘no added hormones’. More than a marketing strategy, these labels, especially those that have been verified by a third party help ensure the highest quality product. Similarly, government regulations also focus on these same principles while at the same time instituting a tracking system that would aide in determining cause if toxins were found in the food system.

Figure 17. Chris Sermons' BioWay Farm. (Source: GC)

Generations ago, it used to be that the consumer knew the origination of their produce and meats: much of which may have originated from your own or neighboring property. With the advent of larger, more consolidated farming operations that ship throughout the world, we no longer know who is growing our food and how it’s grown. Today, with a multitude of federal and state regulations in addition to certifications that denote higher quality (Figure 18), the consumer is coping with being comfortable with their food purchase with the available information provided on packaging or a website.

Figure 18. Some of the myriad of labels that help communicate product quality to consumers. (Sources: Specified entities)

Ideally, the consumer would know the farmer supplying their next meal. Local producers are best situated to capitalize on this strategy. Many grocers and the SC Department of Agriculture as well as individual farmers are returning to this more personal conversation. Farmer’s markets, especially those with strict vender criteria, allows for greater interaction. CSAs have also proven to be an effective strategy to develop this relationship.

For those consumers relying on the packaging alone, labeling regulations have yet to require information that would show the originating farm. For a large farming operation, this extra step would further increase production costs, which according to some local growers, is already nearly untenable.

The balance between growers and consumers understanding the product will continue to be in motion and marketing will continue to play a major role in the operations of larger businesses. The results of the Spice of Life festival survey represents only a small fraction of consumers in the Greenville area, but their responses allude to a group of consumers (65% of those surveyed) whom will pay as much at 20% or more for healthier, safer food produced to higher ethical standards. The goal for local businesses is to determine how their product can be produced to meet the demand of the consumer.

The market is a moving target. Businesses must continually update their target audience and what their target consumers are most likely to find valuable. Maintaining connections offered by non-profits and university may help keep up with these trends.

Labor

Compared to the large, iconic farms raising single, commodity crops typically highlighted as the national scale source of food, labor is a more significant challenge to small, specialty farms in the Greenville area. Still smaller farms rely on unique labor strategies or by growing partnerships. Elsewhere in the system, processors and distributors are also hard-pressed to deliver goods while working within regulations and maximizing profits. Regardless of business size in our area, labor is one of the most significant challenges to many facets of the food system.

One of the largest farms in the area is continuously challenged by increasing labor rates and the changing labor regulations which together squeeze their profit margin. Some of their challenges are working with labor companies and verifying a legal workforce. Further, laborers seek better pay as they are required to increase the number of tasks like tracking and labeling boxes and produce. Every new regulation requiring more tracking requires additional labor.

Another farm, smaller in size, relies on 'woofers' which could be likened to a work vacation/internship and contracted through organizations such as the Worldwide Opportunities on Organic Farms. When hiring a woofer, the business offers room and board in exchange for a certain amount of hours per week. The system is flexible and can accommodate variable lengths of time and labor with various skill levels. However, the business provides the housing and meals (and maybe transportation). The woofer program attracts labor from all over the world, seeking new experiences and cultural immersion.

> Labor is an important input to U.S. agriculture—accounting for about 17 percent of the sector's variable production expenses and roughly 40 percent of such expenses for farms specializing in fruit, vegetables, or nursery products.
>
> (Zahniser et al. 2012)

Still other businesses are solely family run and operated. Many restaurants, farms, and processing businesses continue to rely on the next generation's interest in the business to keep the doors open. Oftentimes, limited labor availability translates to a business that ceases to grow in size. With more and more businesses deciding not to grow, increasing consumer demand is not met. Then local products lose out in maintaining growth in market share. To further complicate meeting demand is the significant costs associated with starting a new farm to capitalize on available market share. What is the critical amount of the market that must become available before lenders realize the value of the investment? Will that market share be lost to imported produce before this level is realized?

Ideally, the cost of local labor would be included into the price of local products. That labor cost would allow the laborers a living wage in the area they work. The laborer would be able to afford the products they harvest or produce. These basic ideas may or may not reflect the current condition of the local food system, but they may lead to good goals for the system.

Hit the Ground Running

As a result of the farmers' and retailers' forums, individual farm visits, and meetings with distributors and stakeholders, a number of activities to address the first four challenges (information sharing, connecting farmers to retail establishments, meeting consumer demand, storage and distribution) have already been implemented. This section will highlight those tasks.

The food system email forum was created by Greenville County Planning and Code Compliance shortly after the farmers' forum in response to the need for keeping area farmers informed. Upcoming training and showcase events, news of potential crop issues, job postings, informational needs and important dates are some examples of the content in the messages, which are generally distributed bi-weekly. The list began with roughly two dozen recipients, and has grown as of June 2012 to over 140.

Edible Upcountry, the local print/online publication highlighting the Upstate local food scene since winter 2010, initiated the Upstate Food Hub. Edible Upcountry dubs the meeting as "a connection event for Upstate food buyers and producers." Through a series of formal presentations, small group gatherings, and posters; farmers, restaurateurs, grocers, non-profit organizations, and representatives from local governments packed the meeting room at the Greenville Technical College North Campus. Edible Upcountry, through their publication and now through this annual event, facilitates new and expanding connections within a throughout the local food system.

Ingles Markets has been one of the largest companies that have shown a significant interest in sourcing local foods and has been a significant partner in this assessment. In

June 2012, they hosted the Taste of Local event at the Cherrydale, Greenville store where they highlighted the farmers who supply their stores. They also invited their distributor, Francis Produce; the Appalachian Sustainable Agriculture Project (ASAP), a North Carolina based local food hub; and Edible Upcountry magazine. All of these producers and partners highlight the regional ties and cooperation within our current food system while making connections and helping with marketing.

The success of the Slow Food Upstate Earth Market (cover photo) was one of the key observations that led to this assessment. Slow Food Upstate is a Greenville-based local chapter of Slow Food USA, and focuses on education and sharing local food culture traditions in an accessible manner. In 2011, the Earth Market boasted 12 vendors; the organization hosted 23 educational forums and provided outreach to restaurants while increasing membership. This niche organization takes the next step beyond organic and humane animal treatment with a focus on heritage breeds and local varieties. The specificity and success of this organization is a reflection of the diversity and growth potential of the Upstate food system. Organizations such as Slow Food Upstate help meet consumer demand by increasing access to local foods.

Figure 19. The Hub City (Spartanburg) mobile market. (Source: GC)

The Carolina Farm Stewardship Association is holding its annual conference this year in downtown Greenville. The annual Carolina Farm Stewardship Conference generally attracts hundreds of participants and is scheduled for October 26-28, 2012. This event is a first for CFSA in Greenville and signifies the expanding activity and interest in local food. The conference will further increase the dialogue among the different facets of the food system with a broader, more regional focus. This focus is imperative when considering a regional, cooperative approach to implementing food system improvements.

Storage and distribution have most likely haunted the agriculture industry from the very beginning. Often relying on a separate entity to store and ship products, farmers and retailers have been experiencing increased shipping prices due to higher transportation costs. Especially for local growers and merchants purchasing food stuff from local farmers, transportation is generally more specialized, having smaller quantities being hauled to fewer clients. This scale has challenged local haulers and storage businesses to alter their business model to take on this new facet of a potentially growing niche. In Charleston, GrowFood Carolina is one such business where produce from local farmers are concentrated into one warehouse. The location of this warehouse is convenient to local grocers and restaurants: a true food hub, and a first in the State to be run by a non-profit.

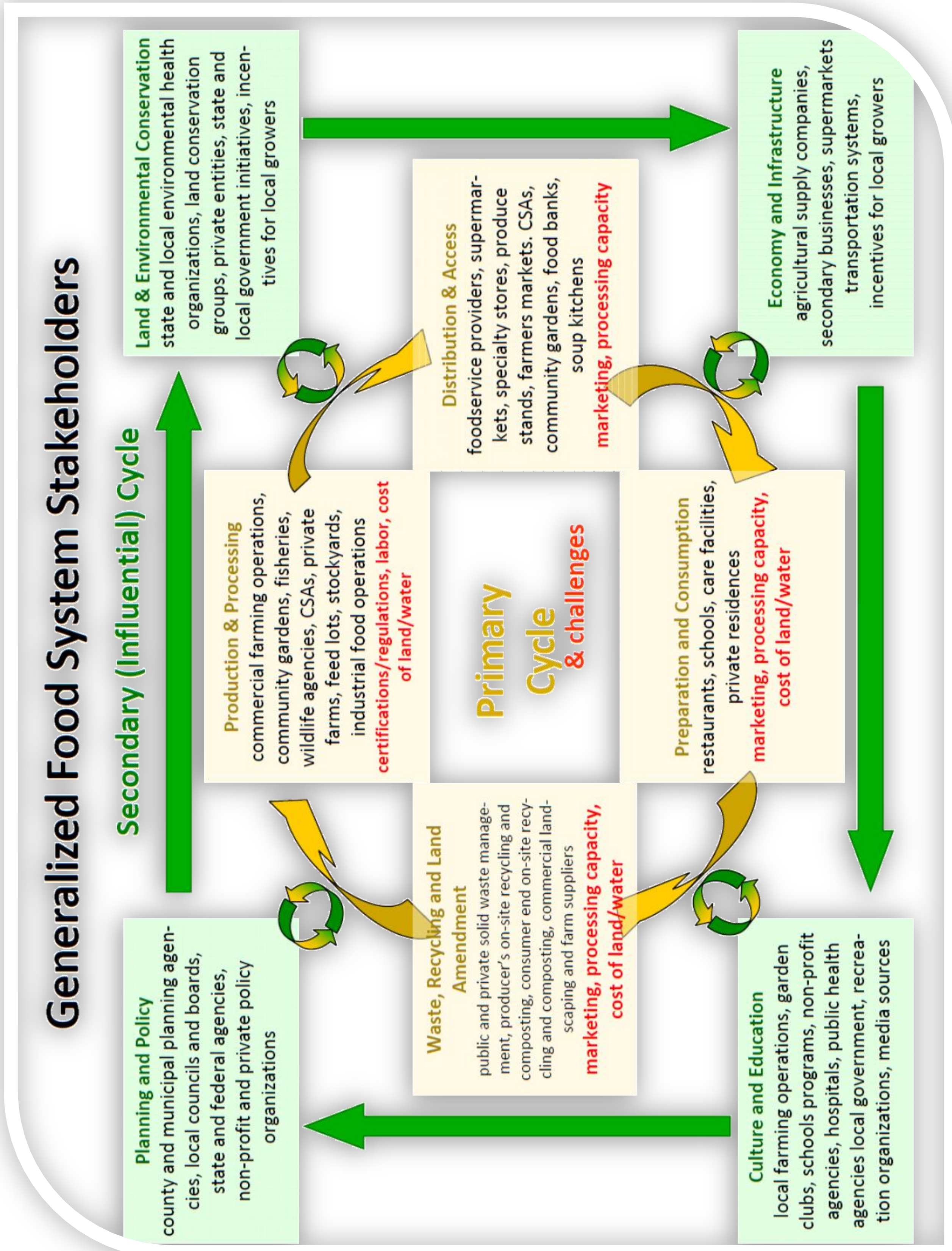
Spartanburg Hub City Market is venturing into providing a similar service, albeit at a more localized scale. In addition to their new mobile food market (Figure 19), their food hub would be likened to a permanent farmer's market where local farmers park and sell within a permanent structure. A small storage area and teaching facilities are also proposed.

Although GrowFood and Hub City are working on strategies to address storage and distribution, other opportunities continue to be available. Two private distribution companies exist in Greenville that may have the capacity, knowledge and mission to help address this challenge and grow with it. These companies already are meeting the local food needs of some clients, but other scales of the industry exist with more specialized needs. For example, community gardens often have surplus produce to provide to local food pantries, soup kitchens and alternative housing organizations. This is a scale that requires heavy logistics coordination, storage and distribution on a scale that may currently exist only on a voluntary basis. One recent example to address the issue has been Meals on Wheels starting their own farm to supply fresh food to patrons; in essence, they are addressing limited distribution directly.

Next Season's Growth

With the assessment period complete and major challenges identified, the next step is to work towards a more robust and secure local food system with a plan. This objective will include mobilizing food system partners, conducting scientific surveys and feasibility studies and incorporating timeframes into a tasks aimed at strengthening the local capacity to grow, distribute, add value to, sell, store, recycle, and export food.

The next steps in this food system study would be to create a complete plan that defines a scope, objectives, and tasks for responsible parties that address food system challenges within certain periods of time. This prescription also calls for local, regional and national experts to help with Greenville area challenges. Concomitantly, similar studies will be investigated and incorporated into this Greenville Area Food System Plan as appropriate. The current diversity of our food system is a strong foundation for growth with significant potential of exporting local products. A comprehensive plan will identify and address specific tasks to help build on that foundation.



Appendix A. 20. Identified Food System Stakeholder Groups

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