



# UNLOCKING THE POTENTIAL OF CHARLOTTE'S FOOD SYSTEM AND FARMERS' MARKETS

February 2019

*good  
food  
is  
good  
business*

PREPARED FOR  
The City of Charlotte

BY  
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# PROJECT BACKGROUND

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 / Keith Sorensen – CDOT

# PROJECT BACKGROUND

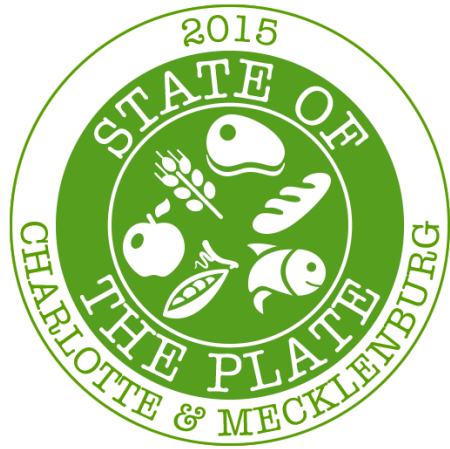
KarenKarp&Partners

Market Ventures Inc.



# OUR PROCESS

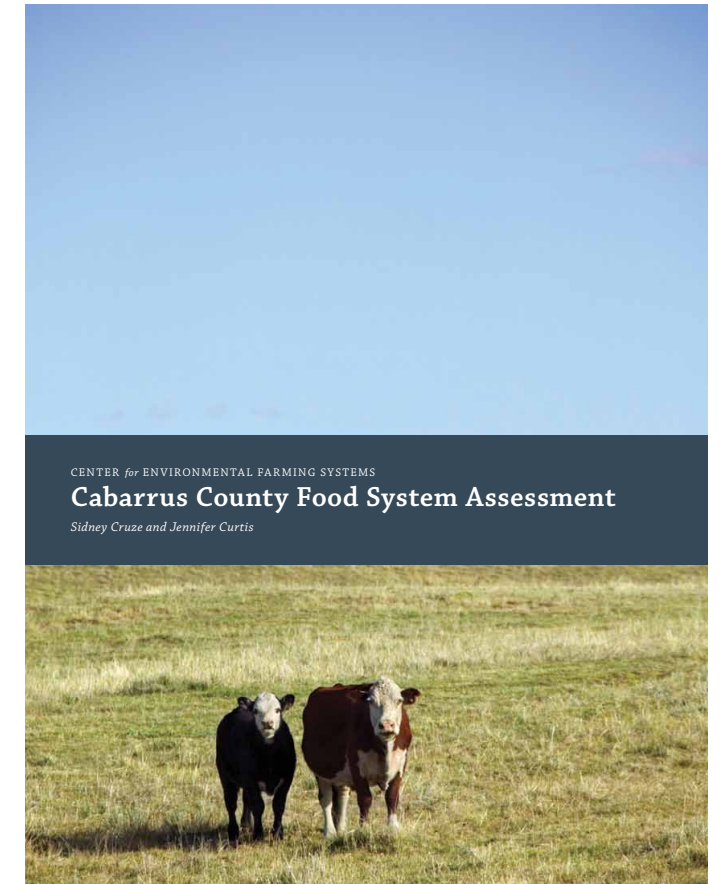
## Background Research, Data Analysis, and Mapping



Charlotte-Mecklenburg  
Food Policy Council

**VICTOR ROMANO, EdD**  
JOHNSON C. SMITH UNIVERSITY

**KATHERINE METZO, PhD**  
ELEMENTAL RESEARCH & CONSULTING





# OUR PROCESS

## Interviews with over 40 stakeholders

### BUYERS

Clark Barlowe, Heirloom Restaurant  
Julie Jackson, The Produce Box  
Sandi Kronick, Eastern Carolina Organics  
Meghan Lambert, Johnson and Wales  
Jesse Leadbetter, Freshlist

### FARMERS

Brent Barbee, Barbee Farms  
Paul Brewington  
Wilbert Gamble  
Daniel Price, Freedom Farm  
Mary Roberts, Windcrest Organics  
Kim Shaw, Small City Farm  
Pressly Williams, Renfrow Farms

### FOOD ACCESS

Dr. Iris Cheng, Atrium Health  
Lisa Duffy, Atrium Health  
Robin Emmons, Sow Much Good  
Nadine Ford, Little Sugar Creek Community Garden

Rickey Hall, Seeds For Change  
Brisa Hernandez, Atrium Health  
Alisha Pruett, The Bulb  
Elliott Royal, Mecklenburg County Health Department  
Anna Zuevskaya, Seeds For Change

### MARKET MANAGERS

Chris Clouden, 7th Street Public Market  
Elizabeth Ann Dover, Plaza Midwood Farmers Market  
Elaine Jones, Atrium Health - University Farmers Market  
Beverly McLaughlin, Mecklenburg County Market  
Amie Newsome, Charlotte Regional Farmers Market  
Reggie Singleton, Rosa Parks Farmers Market  
Mike Walker, Cotswold Farmers Market  
Theodore Williams, Charlotte Open Air Market  
Abby Wyatt, Davidson Farmers Market

### SECTOR EXPERTS

Kristin Davis, NCSU Extension  
Nicole DelCogliano, Organic Growers School  
Katherine Hebert, Centralina Council of Governments  
Thomas Moore, Carolina Farm Stewardship Association  
Dan Murrey, Piedmont Culinary Guild  
Mary Newsom, UNC Charlotte Urban Institute  
Aaron Newton, Lomax Incubator Farm (CFSA)  
Zack Wyatt, Carolina Farm Trust

### POTENTIAL SITES

Greg Pappanastos, Savona Mill  
Todd DeLong, re: Eastland Mall  
Tony Kuhn, Station House  
Varian Shrum, Camp North End

# OUR PROCESS

## Market Visits

### MARKETS VISITED

Atherton Market  
Charlotte Open Air Market  
Charlotte Regional Farmers Market  
Cotswold Farmers Market  
Davidson Farmers Market  
Kings Drive Farmers Market  
Matthews Community Farmers' Market  
Mecklenburg County Market  
Plaza Midwood Farmers Market





# OUR PROCESS

## Focus groups with nearly 30 participants

### FARMER FOCUS GROUP ATTENDEES

Paul Brewington  
Lezlee Colrane  
Amy Foster, Gilcrest Farm  
Brian Hinson, Lucky Clays Fresh  
Gagan Hunter  
Mary Beth Miller, Lomax Incubator Farm  
Thomas Moore, Carolina Farm Stewardship Association  
Dean and Jennifer Mullins, Laughing Owl  
Mary Roberts, Windcrest Farm  
Jay Ross, Bell's Best Berries Farm  
Reggie Singleton  
Jessica Smith, Strongbird  
Ben Street, Fare Farm  
Brad Todd, Lucky Clays Fresh

### MARKET MANAGER FOCUS GROUP ATTENDEES

Chris Clouden, 7th Street Public Market  
Samantha DeRosa, Atherton Market  
Charles Dirico, Selwyn Farmers Market  
Tom Duncan, Friendship Gardens  
Leslie James, Sugar Creek Farmers Market (proposed)  
Amie Newsome, Charlotte Regional Farmers Market  
Wil Jones, Rosa Parks Farmers Market  
Isaiah Scott, Charlotte resident  
Reggie Singleton, Rosa Parks Farmers Market  
Brian Smith, Sugar Creek Farmers Market (proposed)  
Mike Walker, Cotswold Farmers Market  
Theodore Williams, Charlotte Open Air Market  
Abby Wyatt, Davidson Farmers Market  
Paulette Wilkes, Matthews Community Farmers' Market





# OUR PROCESS

Community meeting with over 100 attendees





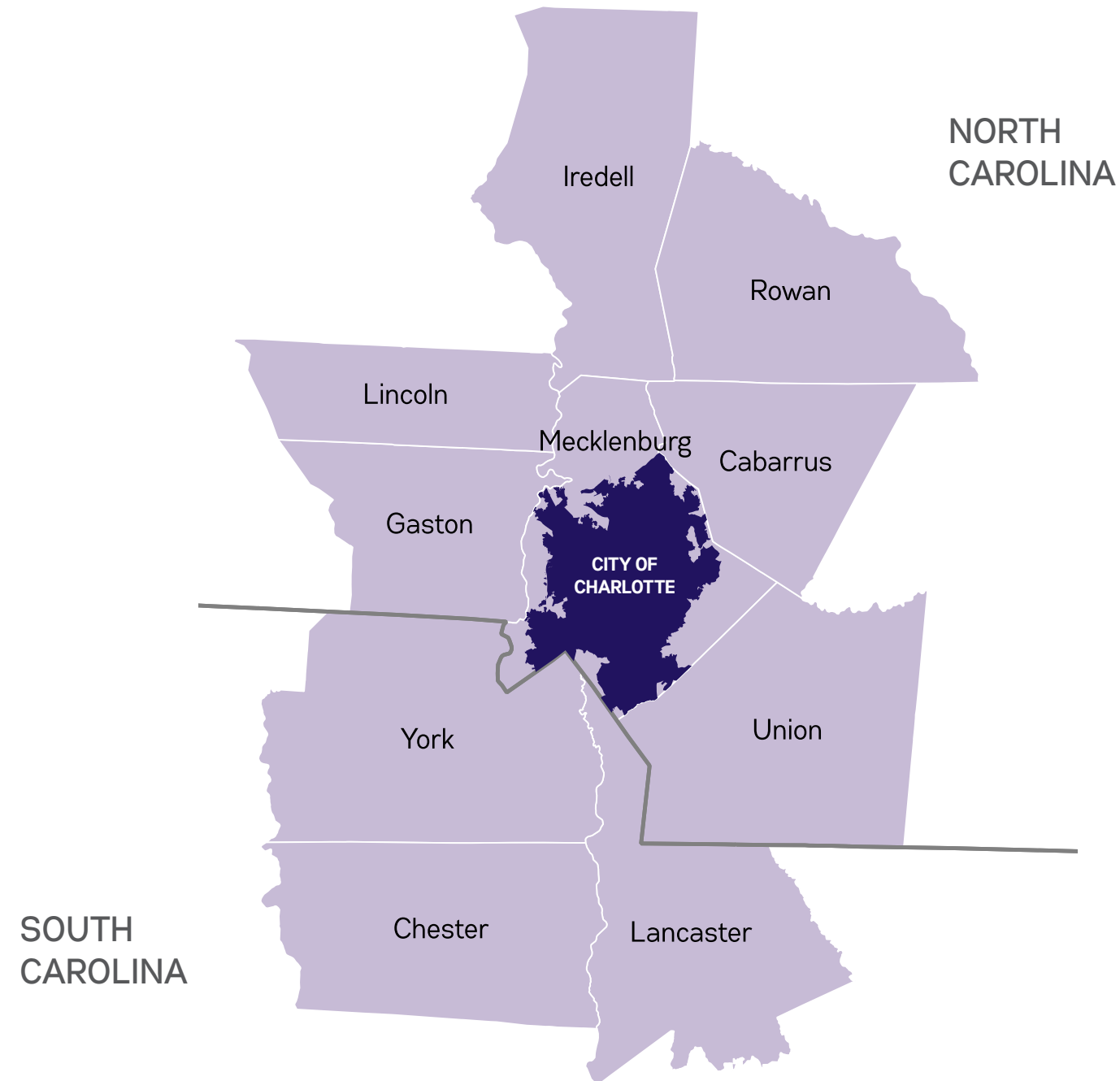
# OUR PROCESS

## Benchmarking and Model Research



# OUR PROCESS

## Defining the Region







## KEY FINDINGS: CHARLOTTE'S REGIONAL FOOD SYSTEM



# FINDINGS

Charlotte has the ingredients of a strong regional food economy.



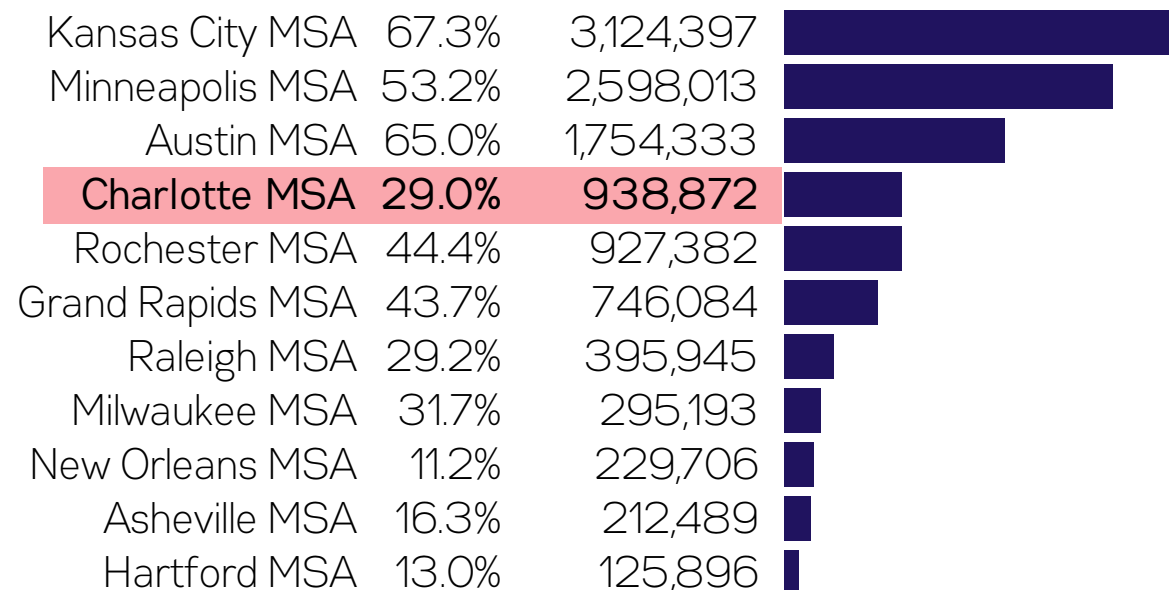
*“Farming in the Carolinas is great. We have great soil and we can grow all year round.”*  
- Farmer



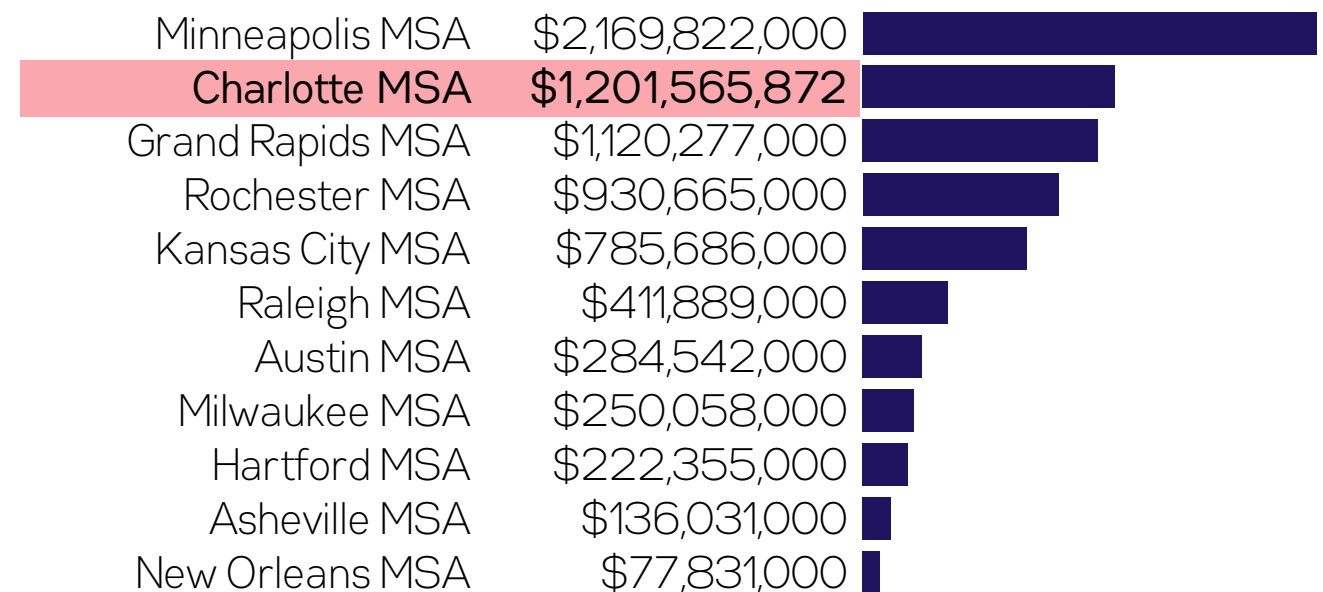
# FINDINGS

Charlotte has the ingredients of a strong regional food economy.

## Farm Acreage and % of All Land in Farms

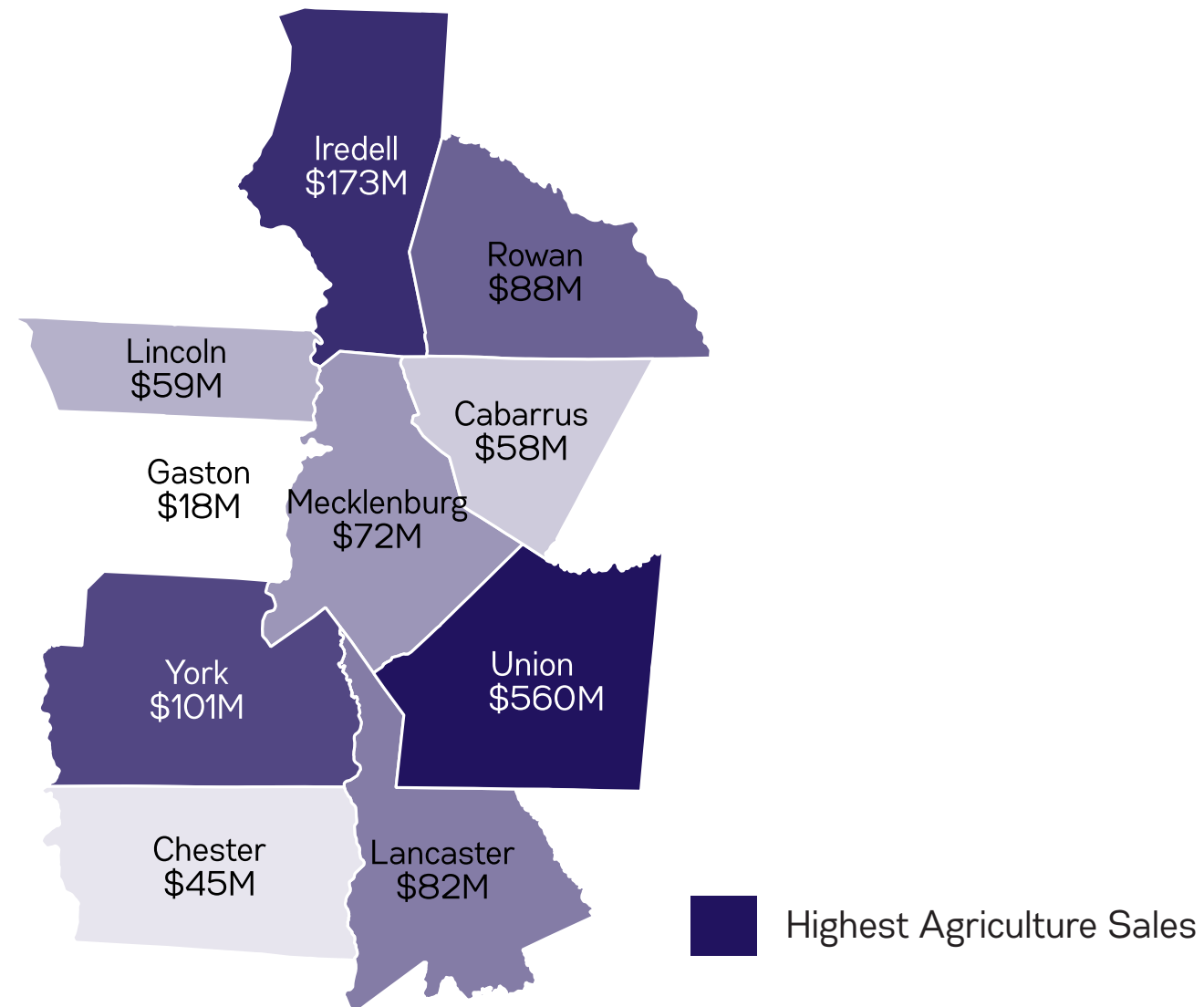


## Agricultural Sales



# FINDINGS

Charlotte has the ingredients of a strong regional food economy.

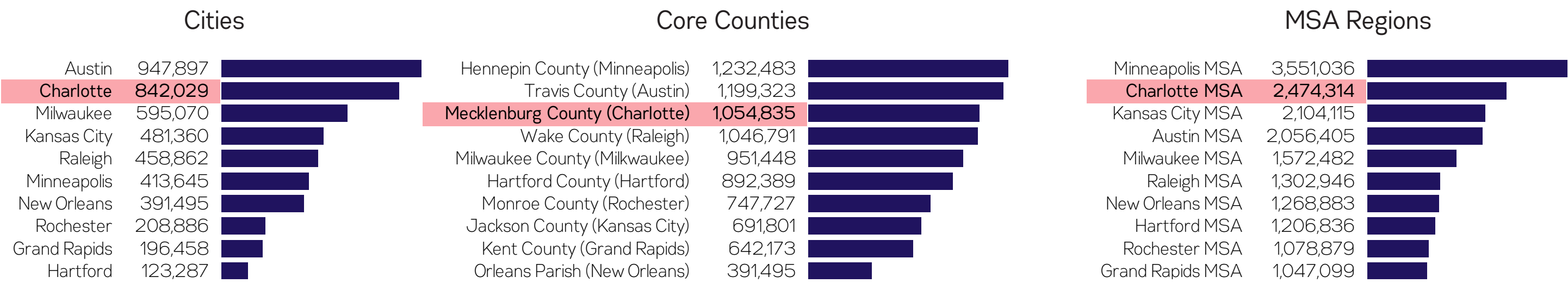




# FINDINGS

Charlotte has the ingredients of a strong regional food economy.

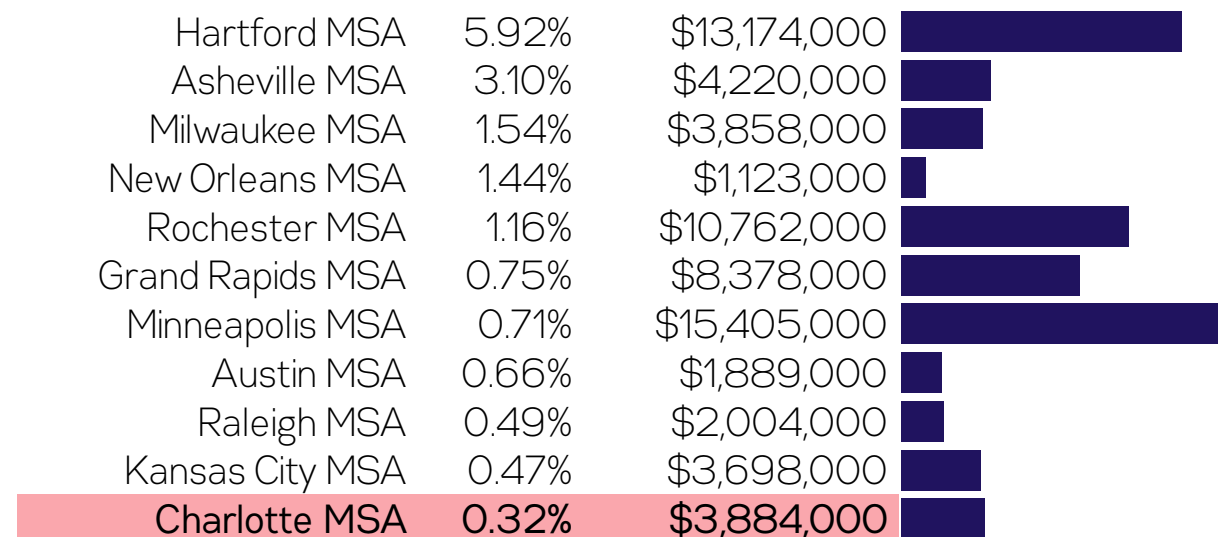
## Population



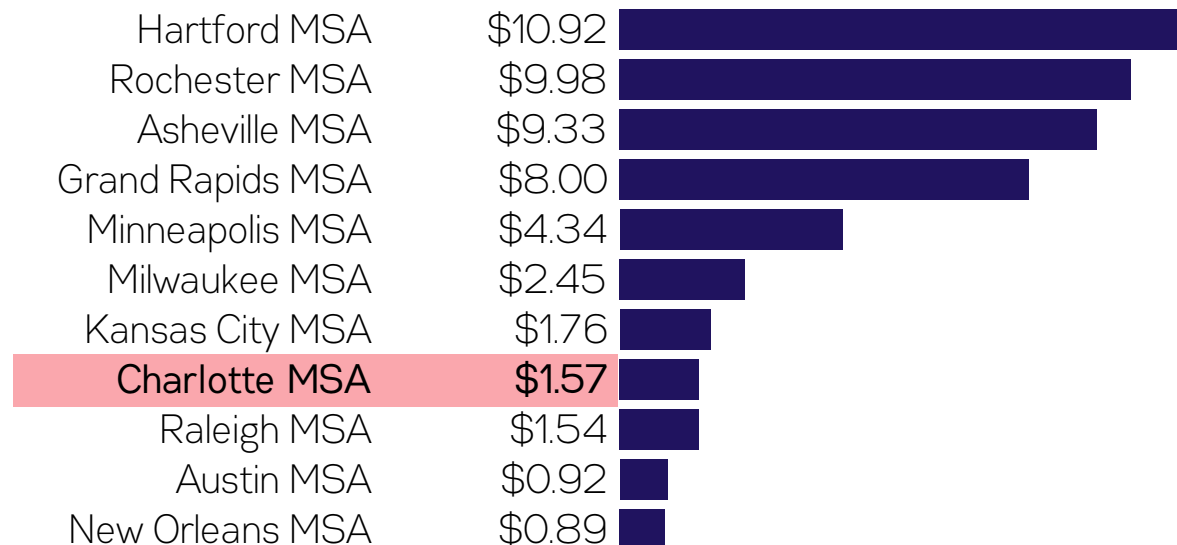
# FINDINGS

## The Charlotte region underperforms in key regional food economy indicators.

### DIRECT-TO-CONSUMER SALES IN BENCHMARK COMMUNITIES: SALES AND PERCENT OF TOTAL AGRICULTURE SALES



### DIRECT-TO-CONSUMER SALES IN BENCHMARK COMMUNITIES: SALES PER CAPITA



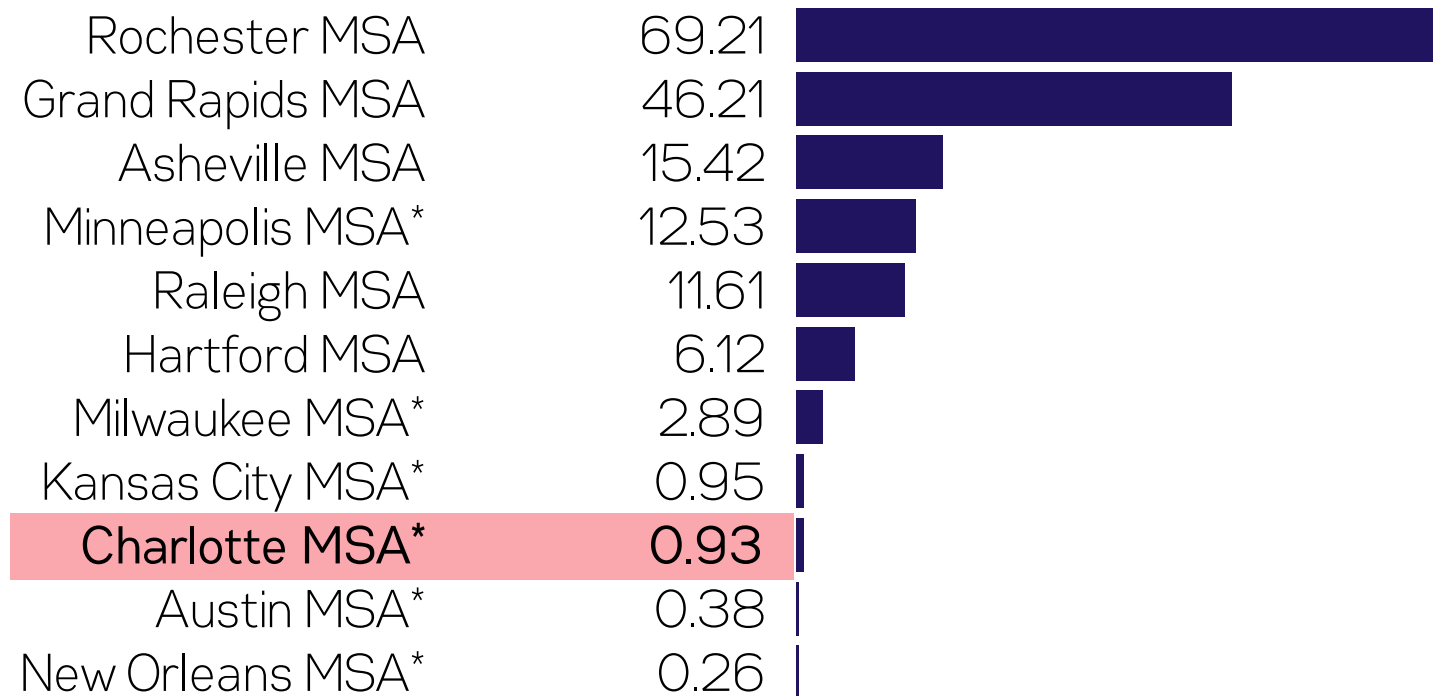
*Direct-to-consumer sales in the Charlotte region are just \$1.57 per capita, compared to several benchmark cities with direct sales in excess of \$8 per capita.*



# FINDINGS

The Charlotte region underperforms in key regional food economy indicators.

## FRUIT AND VEGETABLE ACREAGE PER 1000 RESIDENTS IN BENCHMARK COMMUNITIES



# FINDINGS

Farmers of color and immigrant farmers play an increasingly important role in the region's farm economy.

## FARMERS OF COLOR IN THE CHARLOTTE REGION: 2012 FARMS AND GROWTH 2007-2012

### Farms with Black or African American operators

169  
*farms*

50%  
*growth*  
2007-2012

### Farms with Hispanic or Latino operators

108  
*farms*

15%  
*growth*  
2007-2012

### Farms with Asian operators

48  
*farms*

45%  
*growth*  
2007-2012



photo: Hickory Record













# FINDINGS

Mecklenburg County agricultural land is at risk.

*The county lost over a third of its farms and over half its farm acreage from 1997 to 2012*

## Farm Acreage and % of All Land in Farms

Travis County (Austin)	39.9%	252,686	
Kent County (Grand Rapids)	29.0%	157,493	
Jackson County (Kansas City)	28.7%	110,891	
Monroe County (Rochester)	23.5%	98,676	
Wake County (Raleigh)	15.8%	84,229	
Buncombe County (Asheville)	17.0%	71,480	
Hennepin County (Minneapolis)	19.4%	68,856	
Hartford County (Hartford)	11.5%	54,062	
<b>Mecklenburg County (Charlotte)</b>	<b>4.6%</b>	<b>15,439</b>	
Milwaukee County (Milwaukee)	3.0%	4,563	
Orleans Parish (New Orleans)	0.1%	111	

# FINDINGS

Mecklenburg County agricultural land is at risk.

*Building momentum for a Voluntary Agricultural District (VAD)*

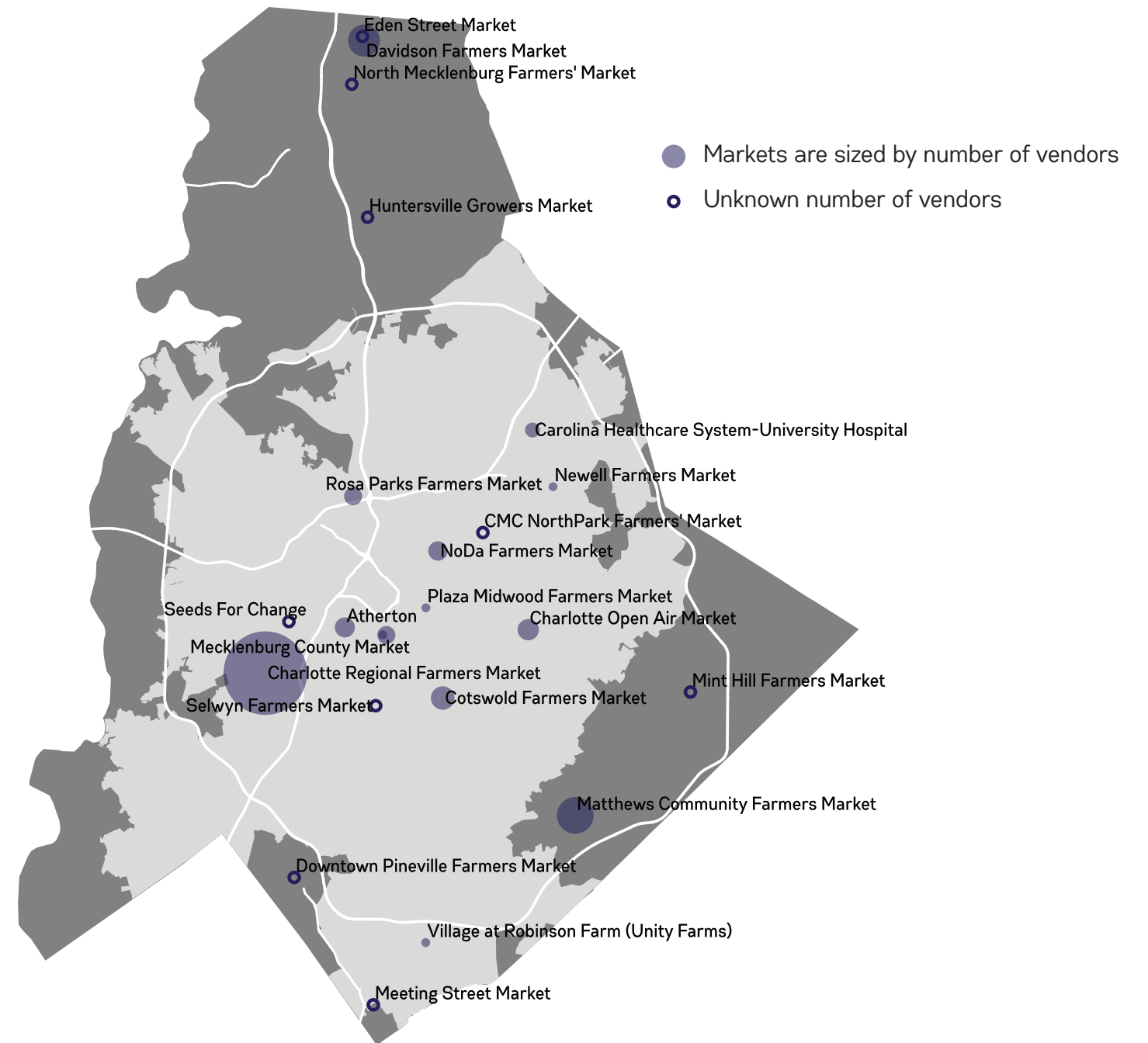


- Mecklenburg County is one of 12 NC counties without a VAD - and the only major urban one
- Led by MC Soil & Water Conservation District with UNC Charlotte, Charlotte-Mecklenburg Food Policy Council, and Rivendell Farms
- Tax benefits and increased protections for farms

# FINDINGS

Charlotte's farmers' markets are missing an opportunity to coordinate and collaborate.

*23 active markets in Mecklenburg County*  
*No formal platform for coordination*





# FINDINGS

The Charlotte Regional Farmers Market underperforms compared to other state-run markets.



## Annual Visitors, 2017

Charlotte:	500,000
Western NC:	1.2 M
Piedmont Triad:	1.6 M
Raleigh:	3.4 M

# FINDINGS

The city's farmers' markets lack clear communications about locally and regionally produced foods.

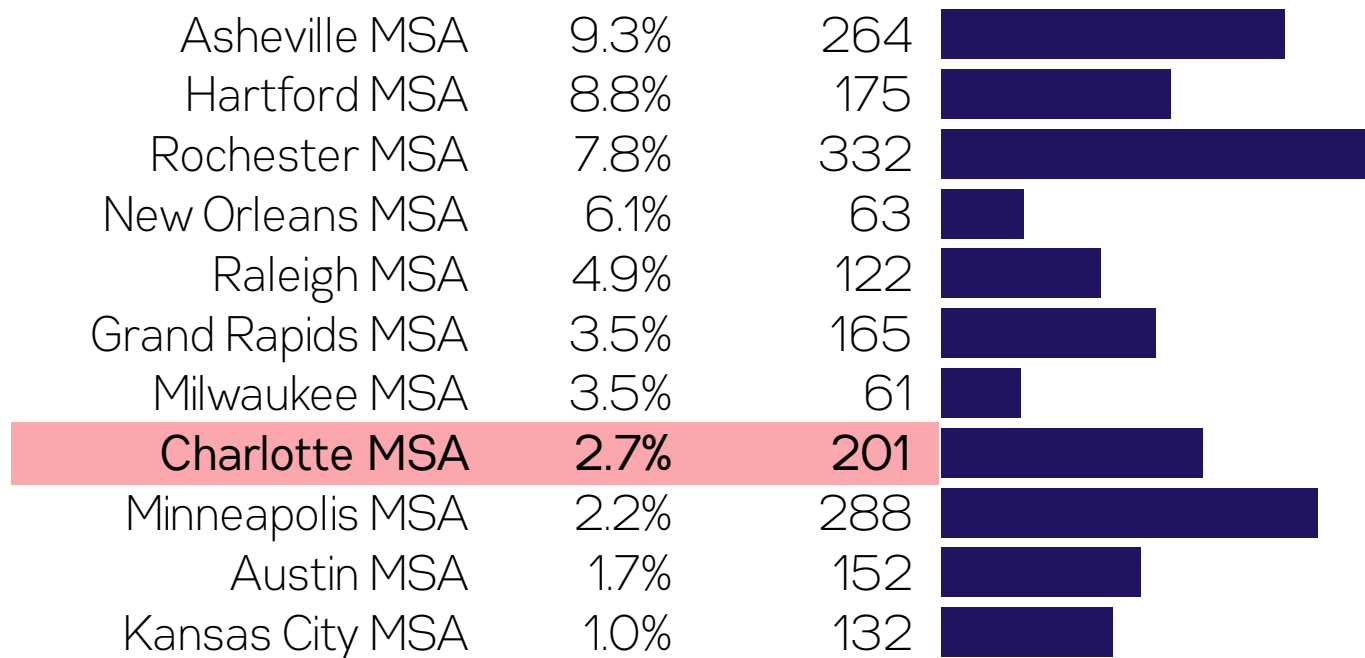




# FINDINGS

Wholesale market opportunities are lacking.

## DIRECT-TO-RETAILER WHOLESALE SALES IN BENCHMARK COMMUNITIES: FARMS AND PERCENT OF ALL FARMS

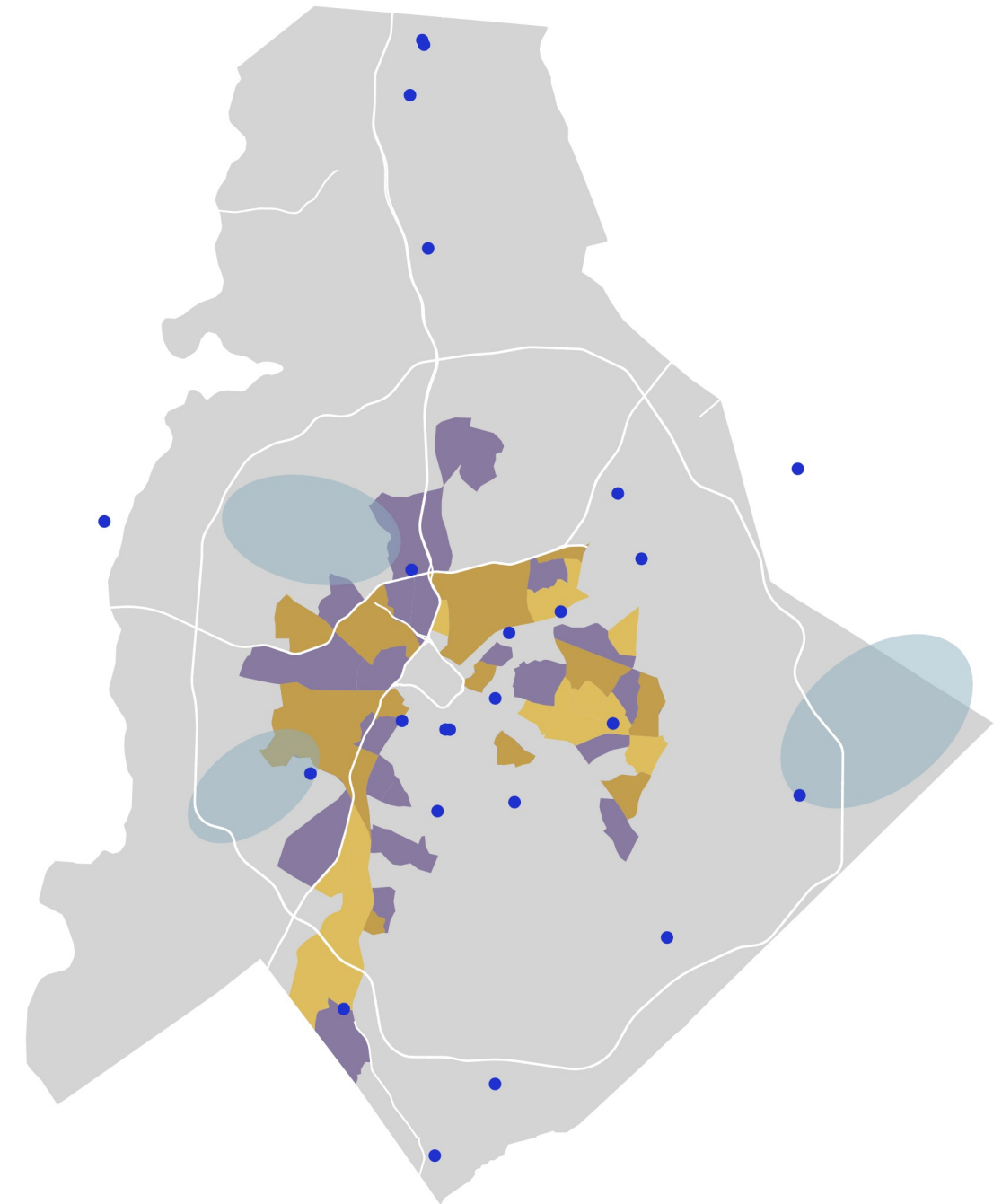




# FINDINGS

The city's farmers' markets can do a better job of responding to the geography of food access and food insecurity.

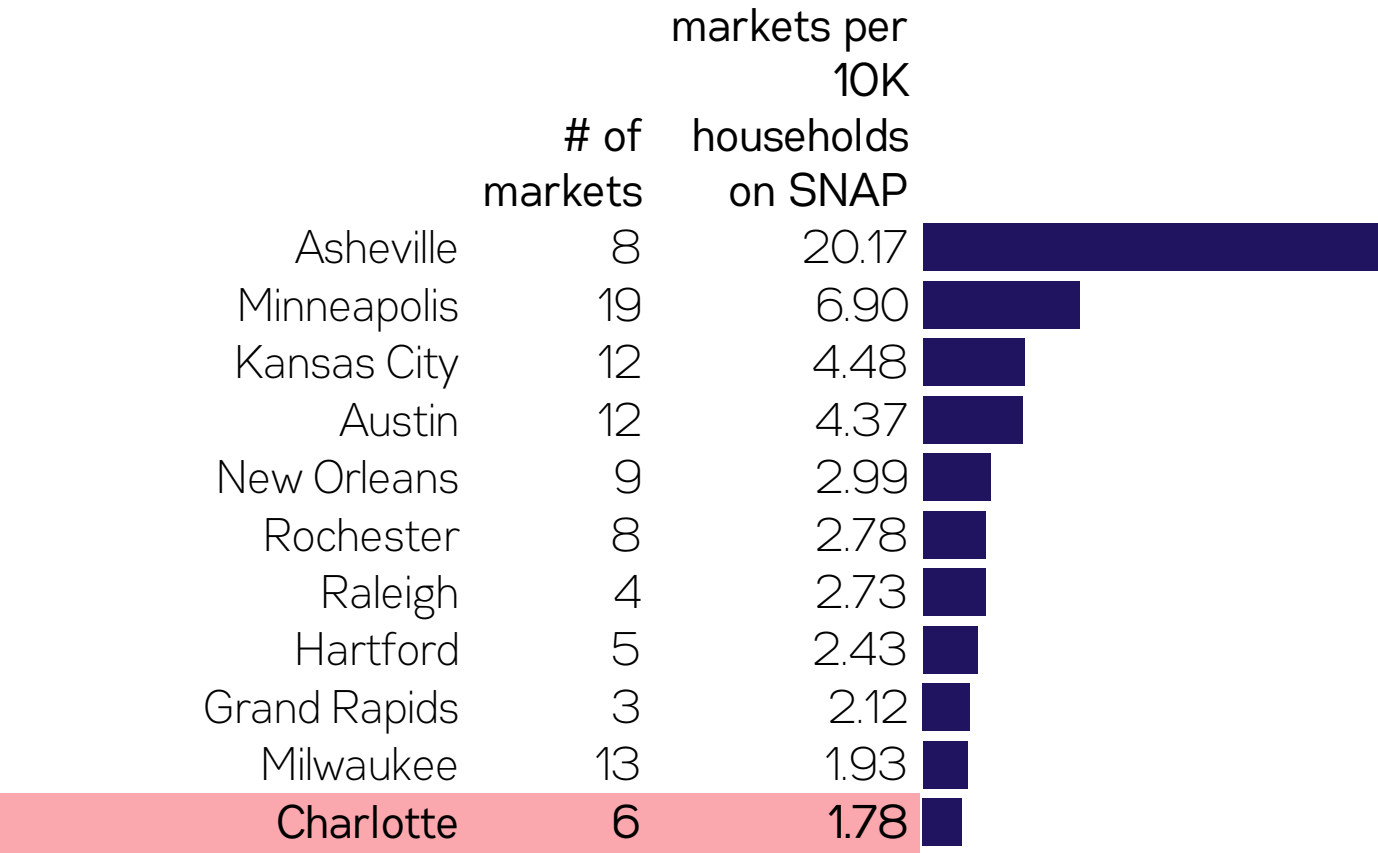
- 2015 USDA Low-Income Low-Access area
- Carolinas Healthcare System Social Determinants of Health high-risk area
- Overlap of USDA and CHS SDOH risk areas
- State of the Plate Food Insecurity High-Risk Communities
- Farmers' Market



# FINDINGS

Charlotte’s farmers’ markets severely underperform in SNAP acceptance.

SNAP ACCEPTANCE AT FARMERS’ MARKETS IN BENCHMARK COMMUNITIES (2018)



# FINDINGS

Education and marketing are needed to help advance a culture of local and healthy eating.







RECOMMENDATIONS



# RECOMMENDATIONS

1. Create a Charlotte Farmers' Market Association.
2. Pursue improvements to the Charlotte Regional Farmers Market.
3. Explore opportunities for new public markets and large-scale farmers' markets.
4. Maintain and increase the production of food in Charlotte's 'foodshed', especially by supporting career pathways and improved livelihoods for the region's farmers.



# RECOMMENDATIONS

## 1. *Create a Charlotte Farmers' Market Association.*

### OBJECTIVE

To coordinate and strengthen the city's existing and new farmers' markets through an entity governed by farmers' market managers and sponsors and supported by paid staff.

### KEY ACTIVITIES

- Marketing and promotion, which will require a city-wide brand development and customer targeting strategy that can be customized for use by individual markets
- Expansion and promotion of SNAP, Double Bucks and other food assistance programs at the city's farmers' markets
- Engagement with city zoning to create a consistent and supportive legal framework across the city
- Sharing of best practices
- Coordinated farmer applications
- Common farm inspections
- Coordination of emergency food providers to pick up surplus, end-of-day foods



# RECOMMENDATIONS

## 1. *Create a Charlotte Farmers' Market Association.*

### ROLE OF THE CITY

- Commit staff time to support the initial convenings and launch of the Charlotte Farmers' Market Association.
- Commit seed funding ongoing support for years 2 and 3, leveraging additional financial support from outside partners.

### KEY PARTICIPANTS

- Market managers
- Host organization
- Sponsoring organizations
- Food system advocates
- Food/culinary professionals
- City farmers' market task force





# RECOMMENDATIONS

## 1. *Create a Charlotte Farmers' Market Association.*

### MODEL: CULTIVATE KANSAS CITY



11 SEPTEMBER 2014

### Beans&Greens Program a win-win for farmers, low-income families

We live in the breadbasket of America and are surrounded by farms, so it should



# RECOMMENDATIONS

## 2. *Pursue improvements to the Charlotte Regional Farmers Market.*

### ROLE OF THE CITY

- Assist in the convening of state and other partners to address this opportunity
- Support for the SNAP program
- Help to address access and visibility issues, especially via improved intersection at Billy Graham Parkway

### KEY PARTICIPANTS

- NC Department of Agriculture and Consumer Services
- Charlotte Farmers' Market Association (Recommendation 1)
- Sponsor organizations and funders





# RECOMMENDATIONS

## 2. *Pursue improvements to the Charlotte Regional Farmers Market.*

### IMPLEMENTATION

- Identification of a lead partner to assist with SNAP implementation
- Partnership development between state, city and local funders to support master planning effort

### EXPECTED OUTCOMES

- Food access improvements: the CRFM has the potential to be the area's largest farmers' market SNAP and Double Up Bucks redemption point
- Increased farmer sales
- Re-introduction of local food wholesaling, leading to increased wholesale activity
- Value-added production and jobs
- Education
- Improved social/gathering space



# RECOMMENDATIONS

## 2. Pursue improvements to the Charlotte Regional Farmers Market.

### MODEL: ROCHESTER PUBLIC MARKET





# RECOMMENDATIONS

## *3. Explore opportunities for new public markets and large-scale farmers' markets*

### OBJECTIVE

To explore the feasibility and create conceptual plans for new permanent farmers' market and public market facilities at accessible locations around Charlotte.

### KEY ACTIVITIES

- Goal refinement and public engagement
- Market research
- Site identification and analysis
- Merchandising and tenant mix plan
- Facility and site design
- Ownership/management options and operating policies
- Potential infrastructure improvements for smaller existing markets

# RECOMMENDATIONS

## *3. Explore opportunities for new public markets and large-scale farmers' markets*

### ROLE OF THE CITY

- Initiation and leadership of this initiative
- Identify approximately \$125K in city funding for public market feasibility and concept development.

### KEY PARTICIPANTS

- Local food advocates
- Funders
- CATS
- Neighborhood/community groups near potential sites



# RECOMMENDATIONS

## *3. Explore opportunities for new public markets and large-scale farmers' markets*

### **MODEL: GRAND RAPIDS DOWNTOWN MARKET**

- Development cost: \$30 million
- Annual operating budget: \$2.1 million
- Annual vendor sales: \$14.6 million
- Jobs created: Over 300





# RECOMMENDATIONS

*4. Maintain and increase the production of food in Charlotte's 'foodshed', especially by supporting career pathways and improved livelihoods for the region's farmers.*

## OBJECTIVE

To preserve farming in the Charlotte region as a viable career, way of life, and robust economic engine, and to sustain and increase the volumes of food produced in the region for its residents.

## KEY ACTIVITIES

- Convening a regional foodshed task force and summit
- Maintaining and expanding resources for farmers and food entrepreneurs
- Supporting expanded market opportunities for the region's farmers
- Developing local food procurement policies for public and private institutions
- Development of a regional food branding initiative - possibly in coordination with CFMA joint marketing and branding





# RECOMMENDATIONS

*4. Maintain and increase the production of food in Charlotte's 'foodshed', especially by supporting career pathways and improved livelihoods for the region's farmers.*

## ROLE OF THE CITY

- Partner with Centralina Council of Governments and others to initiate convening of key foodshed stakeholders for regional foodshed task force.
- Seek city funding to partially support the task force and first Regional Foodshed Summit, leveraging robust additional support from diverse partners Work with County to convene City and County workforce programs.
- Identify opportunities for increased procurement of locally grown foods by city agencies and public institutions.

## KEY PARTICIPANTS

- Centralina Council of Governments and governments across the region
- Farm-oriented non-profits
- Health organizations
- Many others!





# DISCUSSION AND QUESTIONS

Consider support for advancing the Study recommendations:

1. Provide seed/challenge funds to support the work of a Farmers' Market Association or Advocate: \$50,000
2. Request State to support planning for and implementation of improvements to the Charlotte Regional Farmer's Market
3. Provide funding to support development of a market plan for Charlotte (\$100,000)
4. Participate in the development of a regional plan to support careers in farming