

# FORSYTH COUNTY'S COMMUNITY FOOD SYSTEM: A FOUNDATION TO GROW 2013



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Forsyth Futures is a nonprofit collaborative of residents, organizations and institutions working together to address critical community issues. Established in 2006, the organization's mission is to put community knowledge to work by being an objective catalyst, connecting people, and serving as a convener.

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### PROJECT SPONSORS



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# EXECUTIVE SUMMARY

In Forsyth County, North Carolina there is a renewed interest in local foods, including the growth of farmers markets, community gardens, buying co-ops, and local food advocacy groups. New efforts demonstrate an interest in eating locally. There is an evolving vision of a community with a food system that is economically, socially, and environmentally sustainable that is the result of promoting a strong local food economy, ensuring producers and food system workers a fair and sustainable livelihood, and providing all residents with access to fresh and healthy foods. However, the actual and potential social and economic impacts on the community are not yet clear. Thus, there was a need to study the impact and gain a greater understanding of the role of local foods in the current community food system.

With support from the Forsyth County Government and the Winston-Salem Foundation, Forsyth Futures led a team comprised of staff and local/state experts that conducted an objective assessment of the current community (local) food system in Forsyth County. It is hoped that the results will serve as a catalyst to maximize the impact of local foods.

For the purpose of this study, local foods were defined as “fruits, vegetables and livestock that are produced and raised, or processed within Forsyth County and the seven surrounding counties.” The community food system was further defined to include producers, processors, and distributors that serve Forsyth County, and the outlets through which consumers in Forsyth County purchase local food. Because a high portion of local foods consumed in Forsyth County are produced in surrounding counties as well as Forsyth, the decision was made to include food produced in the seven surrounding counties.

The *Forsyth County Community Food System* study focused on the following:

- | Elements of the local food system in Forsyth County and surrounding counties.
- | Challenges and successes of the current local food system.
- | Examples of successful food system elements implemented in comparable communities.
- | Opportunities to expand the positive impact of local foods.

## FINDINGS

Primary and secondary data analysis, stakeholder interviews, community program mapping and surveys yielded the following insights, about the system’s infrastructure, production, processing, distribution and consumption elements:

### 1. A NEED FOR STAKEHOLDER COORDINATION

Key Finding: Stakeholders are seeking a way to drive initiatives that support the community food system, maintain and build connections between one another, and ensure communication occurs in an open and transparent forum.

### 2. MARKETING OF THE COMMUNITY FOOD SYSTEM

Key Finding: In all areas of the food system, marketing was a challenge for stakeholders. Without marketing opportunities, producers and entrepreneurs lose business opportunities needed to maintain and expand their business.

### 3. AN INCREASED INTEREST IN FOOD SYSTEMS

Key Finding: In recent years, citizen and community leaders have shown increased interest and active participation in the community food system. While certainly a positive issue to have, stakeholders are unsure of how to involve themselves in the system to create meaningful change.

### 4. TRAINING FOR A FOOD SYSTEM WORKFORCE

Key Finding: Expansion of the community food system has potential for new jobs, and as a result will require a skilled workforce. In particular, initiatives such as shared-use processing facilities and aggregation centers require a workforce trained to use specific equipment and in food safety.

## 5. LOSS OF FARMLAND AND FARMERS

Key Finding: The amount of farmland in the region is decreasing, and the average age of farmers is increasing. Producers also noted that the inability to find farm labor prevented expansion. A sustainable community food system requires the continued preservation of existing farmland, training of new farmers and access to farm labor.

## 6. GROWTH OF URBAN AGRICULTURE

Key Finding: Community gardening is the primary form of urban agriculture occurring in Forsyth County. With a very strong community garden system, potential exists to expand urban agriculture to urban farms. Urban farms connected to institutions, government agencies, and individual organizations can provide training opportunities for new farmers, education experiences for students, and a new means of food access.

## 7. GROWTH OF SMALL FOOD BUSINESSES & ENTREPRENEURS

Key Finding: Community food systems as an economic development tool rely on their ability to foster entrepreneurship of small food businesses. In Forsyth County, residents have the option to process low-risk food products in the home, but facilities for processing, packaging, and labeling high-risk foods are not available for small businesses.

## 8. LACK OF POULTRY PROCESSING FOR SMALL AND MID-SIZE PRODUCER

Key Finding: The majority of poultry product sales originate from large-scale poultry farms, and poultry products do not necessarily stay in Forsyth County. Other than slaughtering and processing poultry on the farm, convenient options do not exist for small or mid-size poultry farmers.

## 9. ACCESS TO DISTRIBUTION NETWORKS

Key Finding: Distribution networks help farmers reduce the time they spend

marketing their products and allow them to reach markets requiring larger volumes than they produce individually. However, the current food system does not readily provide options scaled for small and mid-size producers.

## 10. SALES TO LOCAL RESTAURANTS AND INSTITUTIONS

Key Finding: Producers and restaurants/institutions desire to form business relationships with one another, however the current system presents some challenges to making this a reality. Restaurants and institutions have specific needs for quantity, variety, and delivery, which often require extra planning on the part of the farmer; by addressing these challenges, restaurants and institutions serve as a strong market opportunity for producers.

## 11. COORDINATION OF FARMERS' MARKETS

Key Finding: Overall the number of farmers' markets in Forsyth County is a benefit. It implies more venues for producers to sell and an increased potential for consumers to access local foods. However, it also presents some challenges. Markets are time consuming for producers to attend, and often operate at hours that are difficult for consumers to attend.

## 12. CONSUMER KNOWLEDGE & VALUE OF LOCAL FOODS

Key Finding: Interviews with food system stakeholders suggest increasing community knowledge of the food system to convey the value of local foods. Many consumers are removed from farming and lack awareness of the benefits of eating locally grown goods, what products are grown in the region, and the seasonality of fresh produce.

## 14. ACCESSIBILITY OF LOCAL FOODS

Key Finding: The ability for all residents to have access to fresh, healthy local foods is an issue that needs to be addressed. Currently, many residents do not have the opportunity to purchase local foods. They may lack knowledge on the benefits of local foods, not have easy access to retailers that sell these foods or not be able to afford them.

## Opportunities for Community Action

Based on the results, the following twenty-four opportunities for community action were identified.

### OPPORTUNITIES FOR COMMUNITY ACTION

System Infrastructure	<ol style="list-style-type: none"> <li>1. Develop a Community Food System Consortium</li> <li>2. Create a Community Food System Coordinator Position</li> <li>3. Explore Local Food Directory Options</li> <li>4. Examine Branding Opportunities</li> <li>5. Provide Food System Training Opportunities</li> <li>6. Develop Job Training Programs for Food Related Businesses</li> </ol>
Production	<ol style="list-style-type: none"> <li>7. Expand the Piedmont Farm School</li> <li>8. Adopt a Farmland Preservation Plan</li> <li>9. Promote Internship Referral Services</li> <li>10. Expand the Community Garden Resource Program</li> <li>11. Amend the Unified Development Ordinance</li> <li>12. Develop Policy for Use of City and County Land/Resources for Urban Agriculture</li> </ol>
Processing	<ol style="list-style-type: none"> <li>13. Complete a Feasibility Study for the Development of a Shared-Use, Processing Facility</li> <li>14. Promote Existing Entrepreneurial Resources</li> <li>15. Work Regionally to Explore Need for a Mobile Poultry Processing Facility</li> </ol>
Distribution	<ol style="list-style-type: none"> <li>16. Strengthen and Expand Food Hubs Serving Forsyth County</li> <li>17. Promote Good Agricultural Practice (GAP) Certification</li> <li>18. Educate Farmers and Chefs</li> <li>19. Establish Institutional Purchasing Policy</li> <li>20. Convene a Farmers Market Association</li> </ol>
Consumption	<ol style="list-style-type: none"> <li>21. Launch a Consumer Education Campaign</li> <li>22. Introduce Local Food Sales to Convenient Stores</li> <li>23. Research and Establish Mobile Markets</li> <li>24. Streamline Process of Accepting SNAP/EBT at Farmers' Markets</li> </ol>

# INTRODUCTION

Food is a community issue that impacts the economic well-being, health, safety, and overall quality of life of all residents. The manner in which food is produced, processed, distributed, and consumed comprises a food system. Post World War II, this system shifted from a primarily local network of producers to a complex national and global system.<sup>1</sup> Following national trends, North Carolina experienced a 56 percent decrease of acreage in farmland from 1950 to 2007.

In recent years, communities have started to explore the benefits of supporting and maintaining a community food system. Some of the potential benefits of a community food system include:<sup>2</sup>

- | Sustainability of farms
- | Creation of new jobs and workforce
- | Generation of a **local multiplier effect\***
- | Accessibility of fresh and nutritious foods
- | Preservation of farmland
- | Development of **social capital**
- | Improvement of environmental quality

In North Carolina, this is occurring at both the state and local level. In 2010, the Center for Environmental Farming Systems (CEFS) released a statewide action guide entitled, *From Farm to Fork: A Guide to Building North Carolina's Sustainable Local Food Economy*. The goal of this action guide is to enhance local food systems throughout North Carolina. The recommendations of *From Farm to Fork* emphasize a commitment at the state, regional and local levels to establishing a strong, "sustainable local food economy in North Carolina."<sup>3</sup> The state has also established the Sustainable Local Foods Advisory Council address policies impacting local food production and consumption.

In Forsyth County, various efforts demonstrate a renewed interest in local foods,

*\*Definitions of bolded terms are found in Appendix A.*

including the growth of farmers markets, community gardens, buying co-ops, and local food advocacy groups. While these efforts demonstrate an interest in eating locally in Forsyth County, the current and potential social and economic impacts on the community are not yet clear. In part, realizing this impact requires a greater understanding of the role of local foods in Forsyth County and the region. Through the following study, Forsyth Futures expects to deepen the understanding of the economic and social impact of the increased production and consumption of local foods in Forsyth County.

**Study Area:** For the purpose of this study, local food is defined as, "fruits, vegetables and livestock that are produced, raised, or processed within Forsyth County and the seven surrounding counties." The community food system consists of producers, processors, and distributors that serve Forsyth County, and the outlets through which consumers in Forsyth County purchase local food. Because a high portion of local foods consumed in Forsyth County are produced in surrounding counties as well as Forsyth, the decision was made to include food produced in the seven surrounding counties. Figure 1 depicts the project study area.

FIGURE 1. Project Study Area



## VISION, GOALS & OBJECTIVES

Forsyth Futures envisions a community food system that is economically, socially, and environmentally sustainable, by promoting a strong local food economy, ensuring producers and food system workers a fair and sustainable livelihood, and providing all communities with access to fresh and healthy foods.

The goals of the study are to provide an objective assessment of the current community food system in Forsyth County, and to serve as a catalyst to maximize the impact of local foods. Forsyth Futures aims to accomplish these goals through the following four objectives:

1. Identify the elements of the local food system in Forsyth County and surrounding counties.
2. Understand the challenges and successes of the current local food system.
3. Provide examples of successful food system elements in comparable communities.
4. Highlight opportunities to expand the positive impact of local foods.

## METHODOLOGY

To provide a comprehensive picture of Forsyth County's food system, Forsyth Futures incorporated a variety of methodologies. The U.S. Census of Agriculture, conducted by the United States Department of Agriculture (USDA) every five years, was the primary source for agricultural statistics in the region. The most recent Census of Agriculture was completed in 2007\*. Forsyth Futures analyzed census data from 1997 through 2007 to understand agricultural trends.

While data from the Census of Agriculture provide a general picture of agriculture in the region, primary data provide a better understanding of the views of stakeholders. Forsyth Futures contracted with The Center for Environmental Farming Systems (CEFS) to assist with the collection and analysis of primary data.

### *Data Collection Methods*

**Interviews:** The CEFS team interviewed 51 stakeholders in the categories of economic development, production, direct-market distribution, food service, and access to local food. The individuals interviewed were recommended by Forsyth Futures and Forsyth County Cooperative Extension. Forsyth Futures completed three additional interviews of community gardeners in Forsyth County, for a total of 54 stakeholder interviews.

**Focus Groups:** CEFS conducted two focus groups, the first to gather comments on access to local foods, and the second to hear from local producers. Eight individuals attended the focus group on access, and three attended the producer focus group. Forsyth Futures conducted a third focus group with community gardeners from Forsyth County; four community gardeners attended.

**Surveys:** As an additional tool to understand the views of stakeholders CEFS distributed an online survey to 108 individuals and received 45 completed surveys.\*\* Almost half of the individuals who completed the survey were also interviewed over the phone or in person. Forsyth Futures also distributed a second consumer survey to residents of Forsyth County to better understand potential changes to the system that would encourage residents to purchase more local foods.

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*\*In general, the Census of Agriculture is recognized as the source for agricultural statistics, however there are some limitations to the Census. The National Agricultural Statistics Service (NASS) defines a farm as an "operation that produces, or would normally produce and sell, \$1,000 or more agricultural products per year."<sup>4</sup> This means that very small farms and/or hobby farms are not captured in the Census. At the moment the Census of Agriculture is the most extensive source for providing a picture of the amount of agricultural production, current agricultural operations, and economic benefit of agriculture.*

*\*\* Given the small sample size and sampling method, tests of statistical significance were not done, but instead this data is meant to reinforce information collected from the interviews and focus groups.*

Finally, a policy analysis of current regulations and ordinances provided an awareness of how current policies impact the community food system. The Winston-Salem Sustainability Resource Center assisted with completion of the policy analysis and provided policy recommendations.

The following compilation and analysis of data on the Forsyth County community food system presented a picture of where the system is excelling and where there are gaps. They form the basis for the final recommendations.

### *Community Food System Inittiascape®*

To gain a deeper understanding of current initiatives promoting the community food system in Forsyth County, Forsyth Futures completed an Inittiascape® study. Forsyth Futures developed, and copyrighted, the Inittiascape® concept as an information tool that allows the community to analyze what programs are currently working on an initiative, and determine connections between programs.

The term Inittiascape® is the combination of the words initiative and landscape because the result is a depiction of the landscape of a community’s initiatives (i.e., programs, campaigns, coalitions, etc.).

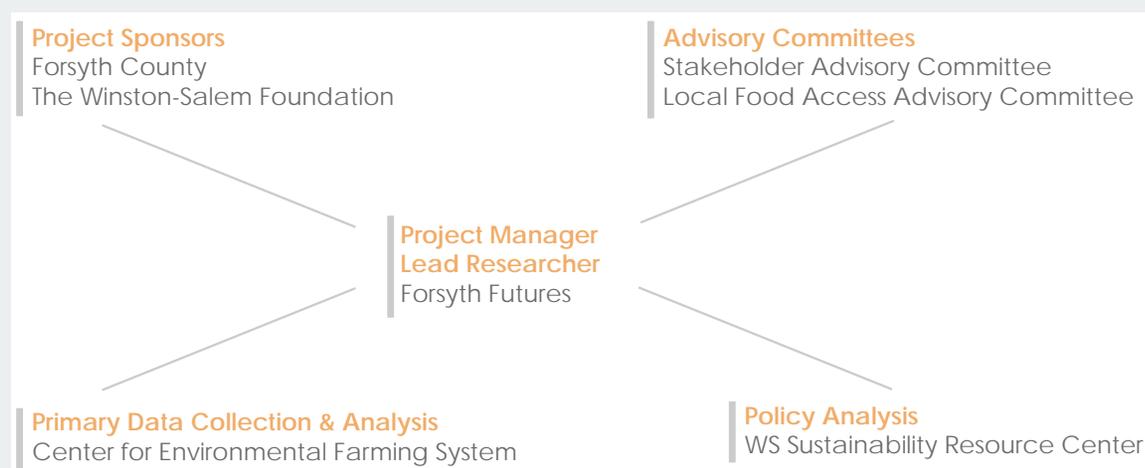
Forsyth Futures has the following intentions for the Community Food System Inittiascape®:

- ▮ Map the landscape of community food system initiatives/programs
- ▮ Promote an understanding of the current scope of initiatives
- ▮ Break down the efforts involved in an initiative by programs
- ▮ Assist community conversations shift towards strategic actions

The results from the Inittiascape® study add to the analysis of the current community food system, and they help guide recommendations for enhancing the system.

**Assessment Team:** To ensure a comprehensive analysis of the community food system, Forsyth Futures formed a research team to assist with various aspects of the project. Along with CEFS, the Winston-Salem Sustainability Resource Center provided a policy inventory and analysis. In addition to the research partners, two advisory committees were formed to provide guidance and oversight of the study process. Forsyth County and The Winston-Salem Foundation granted funding to assist with completion of the study. Figure 2 identifies the partners and their roles in the local food system study.

FIGURE 2. Community Food System Assessment Team

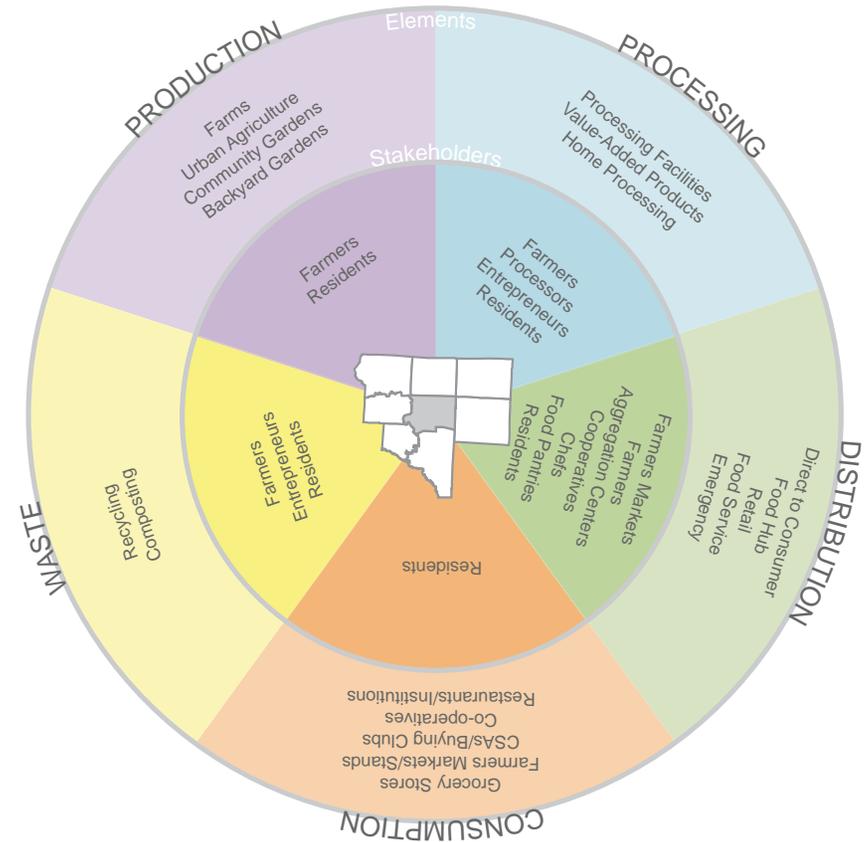


## UNDERSTANDING THE FOOD SYSTEM

A food system is highly dynamic, consisting of numerous components and influenced by social, political, economic, and environmental factors. In general, the term “food system” refers to the cycle and elements of food creation that keep communities fed. Food systems can encompass a local, regional, or global span. For the purposes of this assessment, the food system in question is the community food system; a system in which the elements are connected and promote the economic, social, nutritional, and environmental health of a community. A focus of the food system at a community level reinforces the goal to build a prosperous and just food system through relationships and connections.<sup>5</sup>

A community food system is traditionally broken down into five main categories: Production, Processing, Distribution, Consumption, and Waste. Within these categories are various elements and stakeholders that contribute to the system. Figure 3 describes the elements, and stakeholders of each category.

FIGURE 3. Components, Elements and Stakeholders of a Community Food System



*THE FORSYTH COUNTY COMMUNITY FOOD SYSTEM CONSISTS OF PRODUCERS, PROCESSORS, AND DISTRIBUTORS THAT SERVE FORSYTH COUNTY, AND THE OUTLETS THROUGH WHICH CONSUMERS PURCHASE LOCAL FOODS.*

## IMPACT OF A COMMUNITY FOOD SYSTEM

Food systems are an inherent part of communities; however the positive or negative impacts of community food systems vary based on individual elements. A strong community food system incorporates elements that: <sup>6</sup>

- | Improve the ability to produce raw and value-added agricultural products locally.
- | Boost the local economy and economic opportunities for residents.
- | Increase the opportunities for healthy eating and a healthier population.

Table 1 demonstrates the impacts a strong community food system could have in the areas of economic development, health, and food security. The following chapters demonstrate how the food system currently impacts Forsyth County. The report concludes with recommendations to cultivate a local, just and sustainable community food system. Recommendations focus on maximizing the impact of local foods on economic development, health, and **food security**.

TABLE 1. Impacts of a Strong Community Food System

ECONOMIC DEVELOPMENT	Farmer Sustainability	With support from a community food system and an increase in the purchase of local foods, farmers are more likely to retain dollars spent on food. Direct-to-consumer sales provide the highest retention of food dollars by eliminating the “middleman.”
	Increased Entrepreneurship	A well-developed food system infrastructure provides the opportunity for growth of established businesses and the addition of new food businesses.
	Job Growth	As farm operations and food businesses expand, the need for labor also increases. This also includes the support infrastructure of community food systems, such as shared-use processing facilities and food hubs.
	A Local Multiplier Effect	An increase in producing, processing, and purchasing food locally leads to an increase in dollars that stay in the community. Each dollar spent locally has a greater multiplying impact than dollars spent outside of the system. <sup>7</sup>
HEALTH	Improved Nutrition	Along with consumer education on the benefits of eating fresh produce and how to prepare healthy meals with fresh fruits and vegetables, an increase in the availability of local foods will potentially encourage residents to maintain a nutrient rich diet.
	Decrease in Certain Chronic Diseases	As an indirect impact, a shift in dietary habits could lead to a reduction in chronic diseases related to obesity or poor nutrition.
FOOD SECURITY	Food Access	Access to healthy foods not only means an increase in production, but also a shift in distribution of local food and a consideration of affordability. A strong community food system contains various options for production, purchasing, and cost to provide all residents access to fresh, healthy foods. Community gardens are one element of a food system that offers the potential to reach a range of individuals.

Source: Community food system impacts derived from the USDA’s report *Local Food Systems: Concepts, Impacts, and Issues May 2010*

## END NOTES

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- <sup>1</sup> Martinez, Steve, et al. (2010) *Local Food Systems: Concepts, Impacts, and Issues*, ERR 97, U.S. Department of Agriculture, Economic Research Service.
- <sup>2</sup> Ibid. p42-49.
- <sup>3</sup> Curtis, Jennifer, et. al. (2010). *From Farm to Fork: A Guide to Building North Carolina's Sustainable Local Food Economy*, a Center for Environmental Farming Systems report, Raleigh, N.C.
- <sup>4</sup> United States Department of Agriculture. (2007) *National Agricultural Statistics Service, Appendix A. Census of Agriculture Methodology*. U.S. Census of Agriculture..
- <sup>5</sup> Wilkins, Jennifer, & Eames-Sheavly, Marcia. (2003) A Primer on Community Food Systems: Linking Food, Nutrition, and Agriculture. *Discovering the Food System*. Accessed October 25, 2012 from Cornell University Department of Horticulture. Ithaca N.Y. <http://www.discoverfoodsys.cornell.edu/>
- <sup>6</sup> Bendfeldt, E. S., Walker, M., Bunn, T., Martin, L., & Barrow, M. (2011) *A Community-Based Food System: Building Health, Wealth, Connection, and Capacity as the Foundation of Our Economic Future*. Developed for the Martinsville/Henry County Region.
- <sup>7</sup> The Multiplier Effect of Local Independent Business Ownership. American Independent Business Alliance. Accessed 7 December 2012. <http://www.amiba.net/resources/multiplier-effect>.