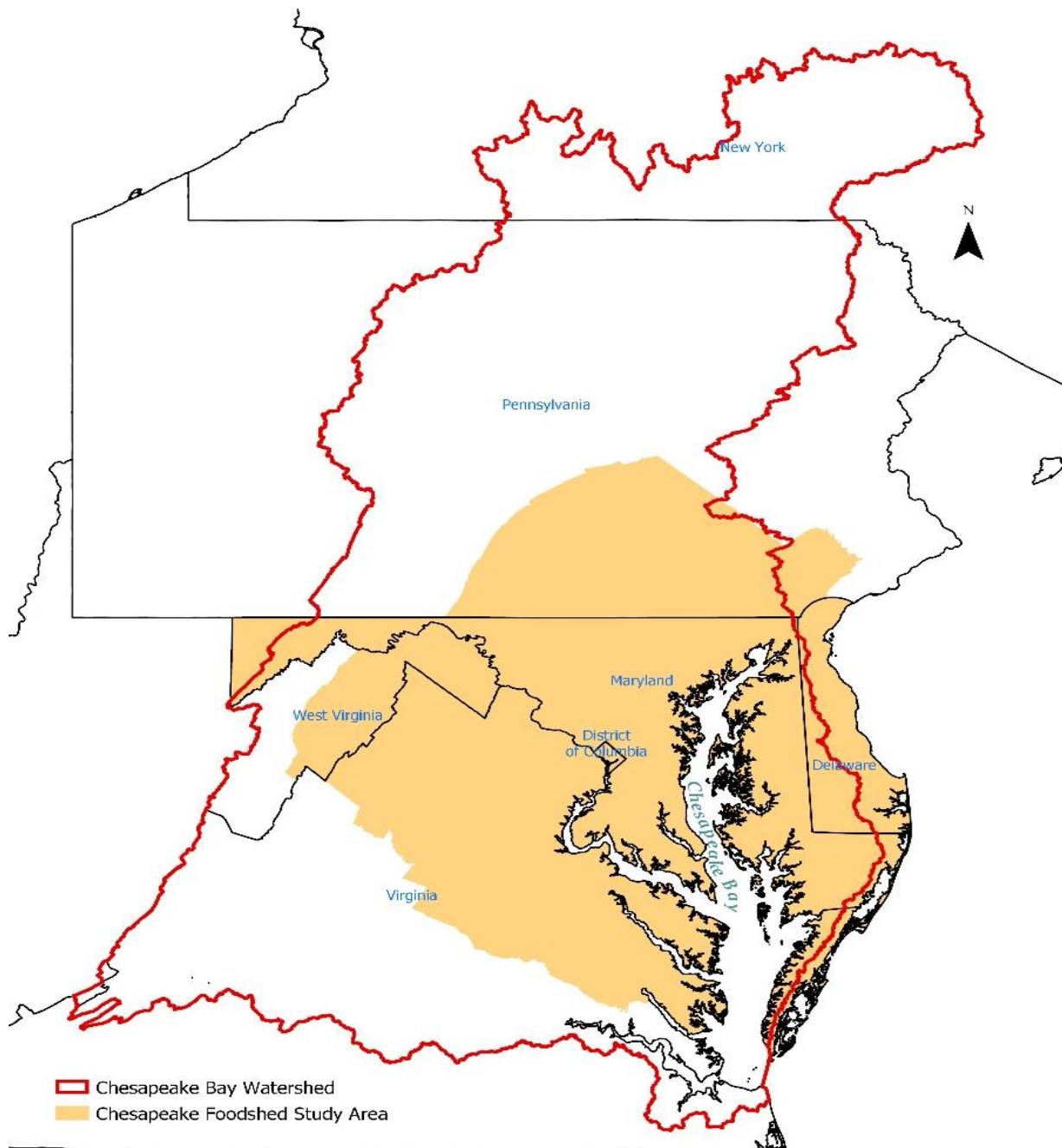




Chesapeake Foodshed Assessment Draft

Harry R. Hughes Center for Agro-Ecology
Sponsored by Town Creek Foundation



This study area consists of

- 82 counties and independent cities in Maryland, Virginia, West Virginia, Pennsylvania, and Delaware;
- 4 major metropolitan statistical areas
- 14.2 million people

It represents:

- 78% of the population in the foodshed
- 63% of the 11.2 million acres of agricultural land in the foodshed
- A diversity of soil types, hardiness zones, and production types

Why Care?

Economy:

- Agriculture contributes \$88.1 billion to the regional economy
- Consumers spent \$57.3 billion on food in the study region
- Direct market farm sales declined 50% from 2007 to 2012

Health:

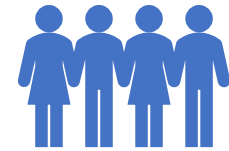
- Cheaper to change diets than treat chronic diet-related disease
- Food access, income disparity, and education are factors in the use of fresh, local products

Environment:

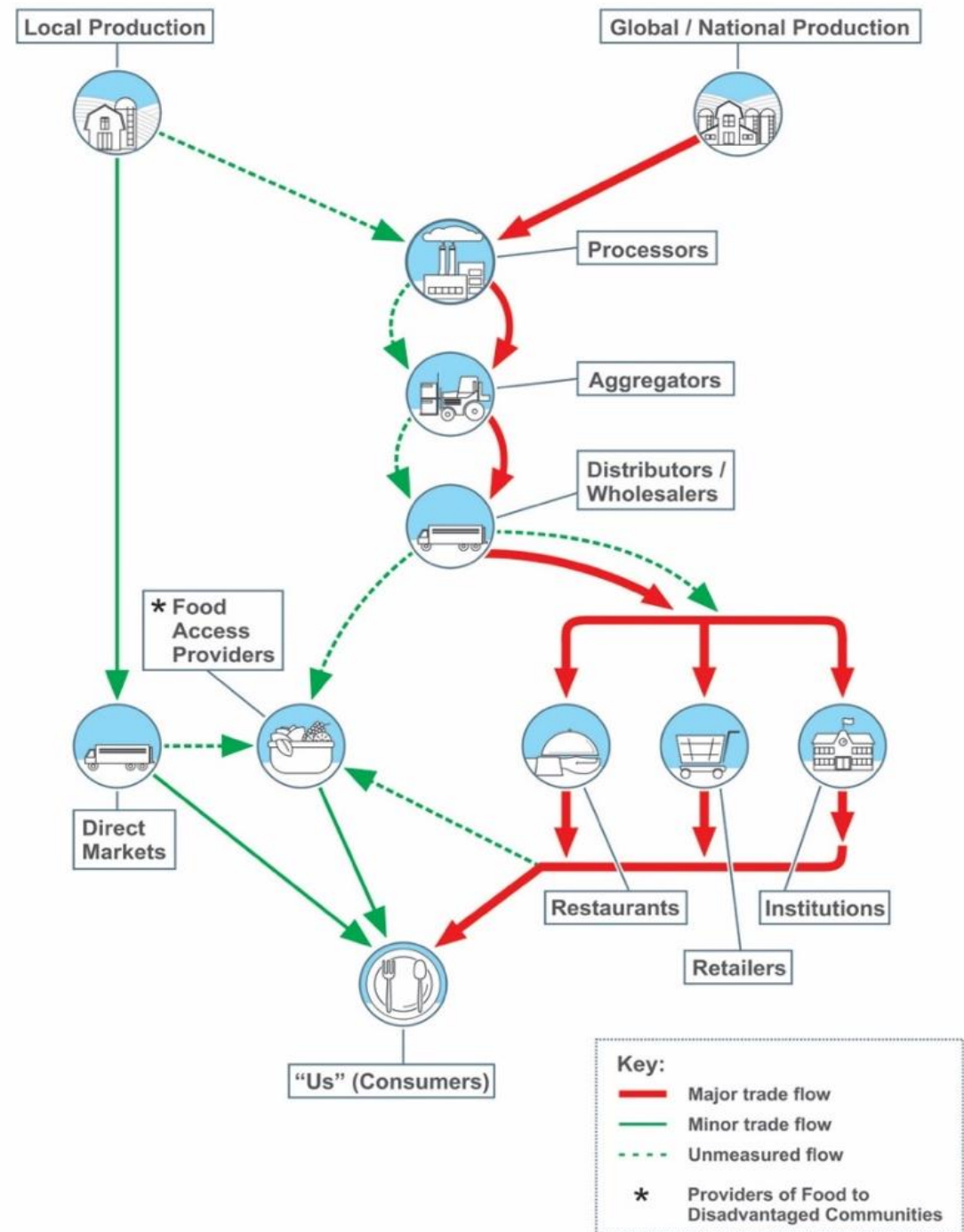
- The connection between a healthy Bay and a healthy food system is understood by all
- Climate change is having a real effect on agriculture

Community:

- Communities and families bond around food
- There is a human cost when the food system fails



- Declining food production
- Low business owner and workforce replacement rate
- Low profitability
- Consolidation and automation
- The “Retail Apocalypse”
- Trust, transparency, and accountability



How Much Stays Local?

Commodity	Average RPC	E/I Ratio
Grains	57%	0.93
Vegetables and melons	12%	0.04
Fruit	11%	0.04
Poultry and egg products	72%	1.19
Flour	29%	0.32
Fluid milk	56%	0.73
Creamery butter	25%	0.05
Cheese	11%	0.59
Dry, condensed, and evaporated dairy products	10%	0.22
Ice cream and frozen dessert	54%	3.20
Meat (except poultry) produced in slaughtering plant	4%	0.09
Meat processed from carcasses	22%	0.38
Processed poultry meat products	48%	2.38
Seafood products	23%	0.62

Where We Want to Be



A thriving, interconnected, supply chain



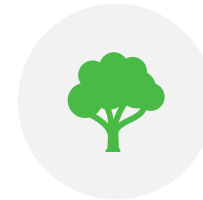
A holistic approach to producing, processing, and distributing food efficiently and effectively.



Community-centric system that prioritizes producers and consumers equally



Profitable operations with livable wages for producers and employees



Environmental stewardship, prioritizing the health of the Chesapeake Bay in production practices



A transparent, trusted supply chain that promotes aggregation and efficiency, and encourages engaged, knowledgeable consumers



Areas of Opportunity



Strengthen community and culture around food.



Promote networked solutions to regional food system development.



Create a Chesapeake Regional Food System “brand” and unified certification system.



Tailor agricultural education, workforce development, and farm transition programs to the future.



Support an entrepreneurial and innovation culture in the supply chain.



Identify or create an entity to serve as a regional coordinator of local food system development projects.