



LOCAL FOOD FACILITY OPPORTUNITIES REPORT

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1. Introduction

Context: The Focus on a Food Facility

In partnership with local food businesses, nonprofits, and other community partners¹, King County is pursuing efforts to strengthen the Seattle region’s local food system and increase access to healthy, affordable food for underserved communities. These efforts hit a major milestone in 2014, when King County adopted the Local Food Initiative—a roadmap for reinforcing and enhancing the local food system across the region. Through the Local Food Initiative and associated efforts, a major weakness of the local food system has become apparent: a deficiency in food-related infrastructure. Specifically, the County and partners have observed that there is insufficient kitchen, processing, packaging, storage space, and transportation capacity to adequately and efficiently connect local food producers with target markets.

But the County also recognizes that the challenges faced by the local food system are larger than that. The local food system is composed of a diverse range of stakeholders, including small- and medium-sized farms, small food distribution companies, farmers markets, food banks, and customers. This constellation of partners requires not just commercial kitchens and warehouse space, but opportunities to coordinate their activities, build strong relationships, and explore creative partnerships.

From this premise, the County has proposed the idea of a consolidated ‘local food facility’ — a multipurpose food processing and distribution facility

How does the COVID-19 Pandemic affect the local food system?

This report was drafted in the late winter/early Spring of 2020. As of this draft, the COVID-19 virus has created a global pandemic that has resulted in entire sectors of the economy being put on pause.

King County was one of the first areas of the United States to be hard hit by the virus and its effects. At this time, it appears that virus cases are decreasing locally. However, lock-down orders continue and a lengthy “Reopening Phase” with its own restrictions on businesses will follow and continue for many months ahead.

The total extent of damage of the pandemic to the local food system is unclear. It will become more apparent in the coming months. However, given the restrictions on businesses, and in particular service sector businesses like restaurants, it is more than likely that local food producers, growers, and other food actors are facing real and difficult challenges. Through this crisis many businesses will struggle to remain afloat. Some will fail.

Now, more than ever, is a time to pursue the development of a local food facility. The development of a local food facility in the near term would give local food producers a place to rebuild their businesses. It could provide much needed storage space for hunger relief organizations. And it would create a central place where food facility actors could cooperatively organize to meet the challenges brought on by the pandemic.

¹ This work is guided by a Project Advisory Committee (PAC). The PAC is comprised of local food actors from across the local food ecosystem, including local food entrepreneurs/business owners, hunger relief organizations, public agencies, distributors, and others. For a full list of PAC members, see Appendix D.

that could meet the needs of multiple food system partners while also providing those partners with ready access to their target markets, especially underserved communities.

Purpose: What Does a “Feasible” Food Facility Look Like?

In 2019, a study was launched to evaluate the feasibility of this local food facility. King County’s Department of Natural Resources and Parks (DRNP) asked ECONorthwest to summarize the factors that will influence its success such as the local food system needs and desires in a local food facility, and an understanding of the likely scope, scale, and programmatic features that could help the local food facility get off the ground.

This opportunities report builds upon the previous work that King County and its partners have completed in exploring the viability of a local food facility, including numerous best practice studies, needs assessments, and market evaluations. These studies have highlighted the need for additional local food system infrastructure. **The purpose of this report is to build upon these past efforts by summarizing, and making understandable, the factors that will influence the feasibility of a local food facility (LFF) in King County.**

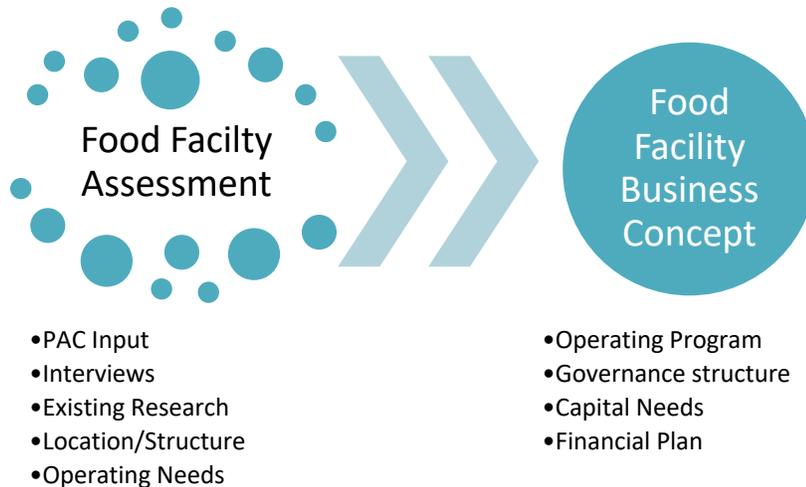
Specifically, we explore demand-side factors of the following components: commercial production kitchen space, co-packing space, storage and distribution space, and value-added production space. King County and partners will use these findings to inform a business concept for a local food facility. Key questions that drive our analysis include:

- What is the nature of demand for the potential local food facility components?
- How might these local food facility components be most efficiently structured/organized to promote a functioning and successful local food facility?
- Given the nature of local food system’s value chains², what site and locational characteristics are important to a properly functioning local food facility?
- Given the geography of the region, and the network of the existing local food system, where would an LFF best create more network efficiencies?

The Assessment is Part of a Multi-Step Process to Develop a Business Concept

This food facility assessment is the first of a two-step process to explore the creation of the food facility in King County. The second step will dig deeper into programmatic, governance, and financial considerations. The final product of this effort will be a preliminary business concept—a concise summary of the facility idea that presents a recommended approach for its creation.

² “Value Chains” describe the relationships, actors, and supportive actions that contribute or detract from value creation along the supply chain for specific food products. A value chain framework contributes to an understanding of how efficient supply chains are functioning and helps to identify where the removal of barriers or, conversely, the enhancement of specific elements, can create additional value.



Assessment Methods: Building on Previous Efforts

To compile this summary document, we used three primary analytical methods: we reviewed past studies, we interviewed local food system stakeholders, and we conducted a targeted survey.

Review of Existing Studies and Facilities

Our literature review involved collecting information from feasibility and needs assessments, as well as infrastructure and value chain studies. From these reports, we gathered data and insight related to local food facility components in the region (e.g. commercial production kitchens, storage and distribution, value-added processing, and co-packing space). Beyond the basics of what differentiates each component, we wanted to learn what users need from each and what factors need to be considered for their creation and long-term sustainable operation. When we encountered gaps in the literature, we sought this information through stakeholder interviews and the survey.

In Person Interviews on Conditions and Needs

In-person interviews with local food stakeholders provided detail and insight beyond what we were able to find during the literature review. Due to their specific knowledge and experience, our interview questions were different for each stakeholder. However, in general, each interview focused on their connectivity to the local food ecosystem, barriers that were affecting their businesses, and support that they sought to enhance or scale their business. Stakeholders interviewed represented local food actors in the hunger relief field, a local distributor, a local contract packer, local food producers, and a grocery store representative.

Targeted Survey

Information garnered from the interviews was supplemented with responses to a survey targeted at local food facility Project Advisory Committee (PAC) members and select other local

food stakeholders. Respondents to the survey represented local farmers, public health officials, local food entrepreneurs, food buyers, food processors/distributors, and those in the hunger relief field. We designed the survey to surface themes, factors, and challenges that—from this knowledgeable group—would be important for the success of the local food facility.

Project Advisory Committee

The study was overseen by a Project Advisory Committee (PAC) consisting of local growers, food producers, advocates, and community members. In addition to providing input to this study through interviews and the targeted survey, the PAC provides overall guidance to help shape a food facility that will work in the King County food system. Many of the PAC members would likely use the facility if and when it is developed.

Organization of this Report

This report is organized as follows:

- **Overview of the King County Local Food System:** The report will begin with the history of production and consumption within King County’s local food system. The overview will also outline the main elements of the local food system and identify key actors and challenges that exist within the food system’s value chain.
- **Local Food Facility Opportunities Assessment:** The assessment that follows will explain where opportunities exist for a food facility to mitigate the challenges local food actors must overcome. The section will take a look at the role of each potential food facility component within the food system as a whole and call out where gaps exist between these components. The section will then investigate the importance of co-location in supporting strong, communicative relationships between local food actors who use these facility components.
- **Local Food Facility Physical and Spatial Considerations:** This section will examine the considerations that need to be made in determining a facility’s location and spatial design; some of these determinations will consider the programmatic use of the facility.
- **Recommendations:** The report will close with recommendations to consider in developing the facility’s focus and purpose within the context of the local food system’s landscape and actors. The recommendations suggest a targeted focus with plans to help businesses scale up, connect business and knowledge, and support established, but emerging food businesses.
- **Appendices:** There are four appendices, the first of which will provide detail about our research and survey methods. Survey Response information can be found in Appendix B. Appendix C includes examples of other established local food facilities throughout the United States, and Appendix D contains a list of the Project Advisory Committee members who contributed valuable insight to inform the opportunities report.

Readers should come away with an understanding of not only how a local food facility can fill in the gaps present within the local food system, but what considerations are necessary in order to begin developing a local food facility. Moreover, our recommendations should help readers picture what the facility's focus and purpose could be in order to effectively take advantage of the opportunities existing between local food components and actors.

2. Overview: King County’s Local Food System

Local Food System is Small, Growing

King County, home to Seattle and the largest contiguous metropolitan area in the Pacific Northwest, has a robust food system and is the largest food market in the greater region. In addition, the county is home to a myriad of small and mid-sized farms and multitudes of food producers. The county has 14,200 acres of preserved farmland and over 20,000 acres in food production. At 20 restaurants per 10,000 people, the region is rich with a diverse array of retail food options³. This incredible diversity explains why Seattle was ranked the eighth best city in the U.S for food and why, by King County’s estimates, King County residents spend close to six billion dollars annually on food and beverages⁴.

While King County’s food system is expansive, its *local* food system is relatively small and faces a variety of challenges at various levels. In this report, we use the term *local* to differentiate between “big ag” producers and corporate food brands, rather than defining it in terms of a strict geographic limit.

Increasing Returns from Local Food Production and Consumption

King County has a long history of preserving farmland and supporting farmers and farmers markets. The County’s successful Farmland Preservation Program stretches back decades, while its “Puget Sound Fresh” campaign has supported farmers markets and educated consumers about locally grown products for nearly 20 years.

However, less than 2 percent of the nearly six billion dollars spent annually on food

What does “local” mean, in the context of King County’s food system?

In this report, we intentionally avoid a strict definition of “local”. In our conversations with local food stakeholders, we found that the term is used more as a differentiator from “big ag” and corporate food brands than a definition with strict geographic limits.

This makes sense; the emergence of the local food movement has been grounded in ideals of environmental responsibility and social and economic justice. The idea being that *local* signals a product that supports a local consumer’s community in a variety of ways and is an alternative from “corporate food” and all that may come with it.

While a loose definition of local may be a suitable starting place for a conversation about supporting emerging food systems, there are benefits in unpacking the definition of *local* food as the food facility concept moves towards implementation. For example, what values does *local* imply to consumers? How can those values be honored by local food facility practices?

Answering these questions would help communicate to partners and local food consumers what to expect from the local food facility. It could help garner support and strengthen relationships in the local food community.

³ King County DNRP. 2015. Local Food Initiative: A Roadmap to Strengthening King County’s Local Food System and Increasing Access to Healthy, Affordable Food.

⁴ King County DNRP. 2015. Local Food Initiative: A Roadmap to Strengthening King County’s Local Food System and Increasing Access to Healthy, Affordable Food.

and drink is actually grown in King County. If this figure was increased to 10 percent, an addition of at least 10,000 new jobs, a stronger rural economy, improved health, and more could follow.⁵

Local Food Industry Faces Unique Challenges

Without a stronger local food system, small and medium-sized farmers and food producers in King County struggle to connect to markets and scale their operations. Many King County farmers, for example, have reported that their operations are in the red, which has forced them to seek income outside of their core business—between 2007 and 2012, 56 percent of King County’s farmers relied on additional income sources in order to support their operations and family.⁶ While many of the factors driving these trends may be external to the food system—climate change, conversion of agricultural land to other uses, etc.—a strengthened and reinforced local food system would support a range of local food actors, such as farmers, in King County. For instance, recent efforts by King County to raise awareness about where and how to access local food have helped increase total local farm sales at farmers markets. However, there is still room for improvement; of the 307 farmers present at King County farmers markets in 2017, 20 percent of them were King County local farms⁷.

What are the Main Elements of the Local Food System?

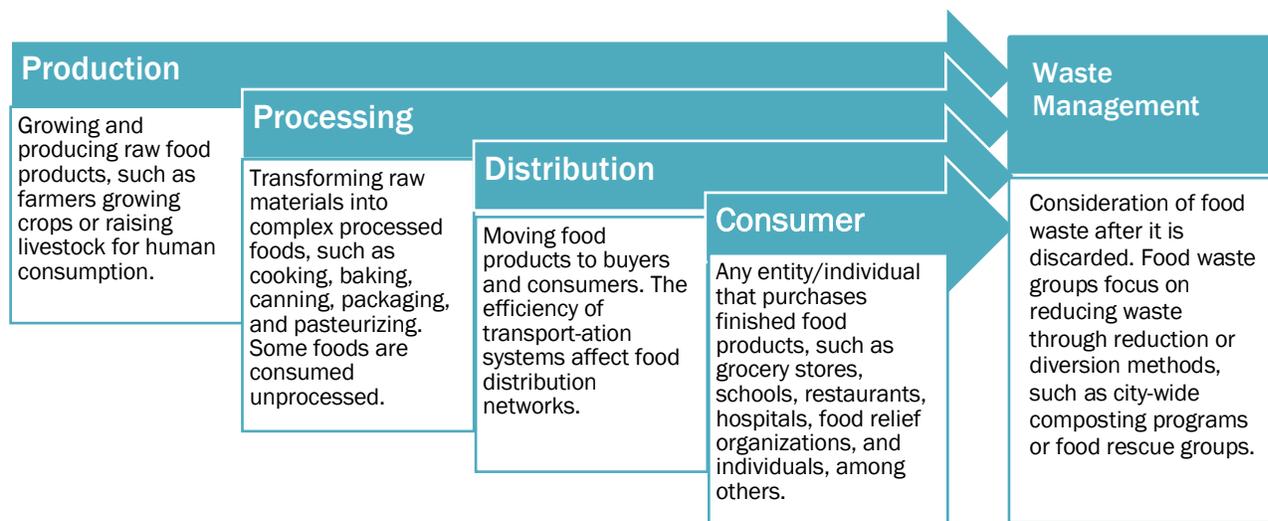
Evaluated together, the expansiveness of King County’s local food system along with its challenges illustrate a robust and interconnected, yet inefficient food system. In this introductory section of the report, we quickly summarize the elements, actors, relationships, and other linkages of King County’s *local* food system.

Food systems are complex networks and they are not all alike. The food system can be thought of as an ecosystem of actors that relate and coordinate with each other around common food products. Broadly, five elements make up a food system: production, processing, distribution, consumers, and waste management. The following flow chart defines each element and demonstrates their position within the food system.

⁵ King County DNRP. 2018. Local Food Initiative. (Retrieved from <https://www.kingcounty.gov/elected/executive/constantine/initiatives/local-food-initiative.aspx>).

⁶ King County DNRP. 2015. Local Food Initiative: A Roadmap to Strengthening King County’s Local Food System and Increasing Access to Healthy, Affordable Food.

⁷ King County DNRP. 2017. Local Food Initiative: 2017 Annual Report.



Key Actors and Challenges in the Food System Value Chain

As illustrated in this section’s exhibits, the local food system is a complex network of relationships with many actors and influencing factors. Understanding the roles of these stakeholders in the food system and the challenges that they face is crucial to understanding how a local food facility would benefit the local food system.

A theme that emerged from this process—the literature review, stakeholder meetings, and survey—is that many of the challenges in local food systems are associated with physical infrastructure. *Is there an affordable production kitchen for a food entrepreneur to make her products? Is there a sufficient amount of available cold storage for a hunger relief organization to accept a donation of perishable food products?* Enhancing local food infrastructure can remove value chain barriers and create more value for multiple food system actors.

In Exhibit 1, we provide a table with more detail about local food system actors and their challenges.

Exhibit 1. Local Food System Actors

Source: ECONorthwest

Local Food System Actor	Role in the Local Food System	Location in Value Chain	Primary Value Chain Challenges
Farmers (small to medium sized farms)	Growing/producing food to sell.	Beginning. Farmers grow/produce food that is either packaged and sold or processed into value-add food products.	<ul style="list-style-type: none"> ▪ Access to markets (buyers) ▪ Access to funding/technical assistance ▪ Access to affordable storage (dry/cold)

Local Food Businesses/Entrepreneurs	Local food businesses create value through the transformation of food inputs into finished food products. Food entrepreneurs spark innovation in the food system through new product and business creation.	Local food businesses transform raw or partially processed food inputs to create consumer facing food products. They straddle the gap between farms and other small food businesses and those that support conveyance of their products to markets.	<ul style="list-style-type: none"> ▪ Startup costs ▪ Access to affordable food infrastructure (production kitchens, storage space, etc.) ▪ Access to markets (buyers) ▪ Access to capital and technical resources.
Contract Packers	Paid to package producers' food products with producer's branding and logos. Contract packers sometimes are vertically integrated and have the capability of producing and/or distributing food products.	Contract Packer ("Co-Packers") typically work between producers and distributors and buyers.	<ul style="list-style-type: none"> ▪ Most contract packers require product minimums, making it difficult for small food producers to access their services.
Local Distributors	Connecting farmers/food producers with buyers	Distributors are connectors. They work between farmers/food producers and buyers. The aggregate, distribute, and sell food products from others. They provide value both up and down the value chain by facilitating efficient movement of products.	<ul style="list-style-type: none"> ▪ Operating costs: high rent, transportation costs ▪ Food regulations and bureaucracy ▪ Competition from larger distributors ▪ Access to affordable storage and packing space
Regulators	Pass laws and regulations to make the food system safe and fair for producers and consumers.	Regulators interact with actors all along the value chain.	<ul style="list-style-type: none"> ▪ Balancing necessary food safety and other regulations with value chain efficiency.
Hunger Relief Organizations	Bridge inequities and logistical challenges in the food system to prevent hunger.	Hunger relief organizations work with farmers, distributors, and others to source and distribute food products to hunger relief outlets.	<ul style="list-style-type: none"> ▪ Access to capital and funding ▪ Access to food infrastructure—especially storage
Buyers	Buyer—food consumers, grocery stores, institutions—form the demand side of the food system. They are the pull factor that together create the	Buyers are where food products are directed. They form the penultimate stop for food products along the value chain.	<ul style="list-style-type: none"> ▪ Buyers need efficient food distribution systems. ▪ Product consistency and cost.

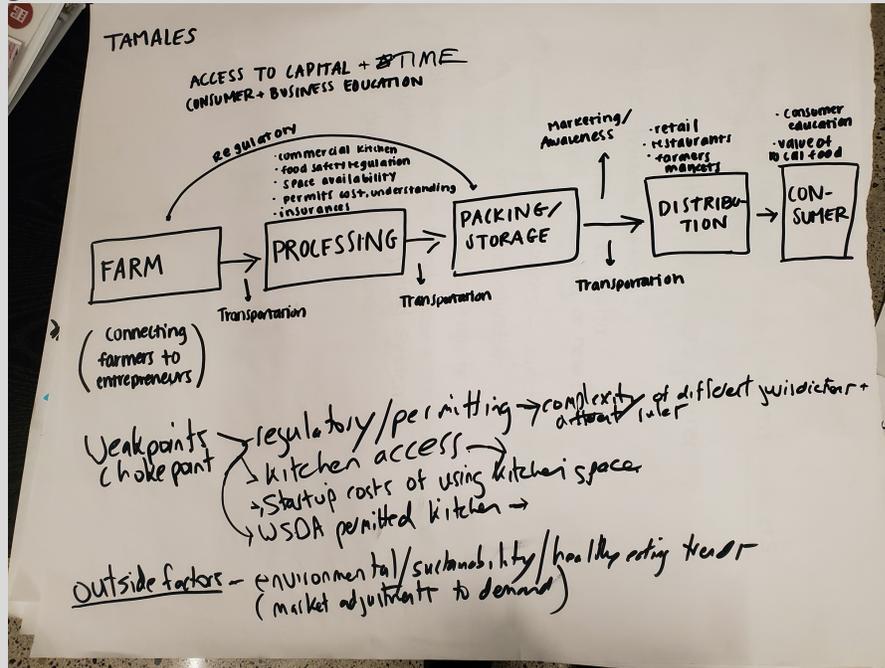
	market for food projects.		
Food Waste Management	Work to make the food system more efficient to prevent and reduce food waste.	Food waste management tackles the challenges of diverting unused food, and reducing food waste.	<ul style="list-style-type: none"> ▪ Reducing food waste at scale

During a PAC meeting in January 2020, committee members participated in a value chain mapping exercise intended to create a value chain model for a specific product. This exercise illustrated how value is added to food products as they move from producers to consumers, identified relationships in King County’s local food system, and demonstrated challenges that small actors face when getting product to market. Exhibit 2 presents some of these value chain maps.

Exhibit 2. Local Food System - Value Chain Mapping Exercise

Tamale Production

The diagram depicts the local food system moving from the farm where the raw ingredients are grown to the consumer.



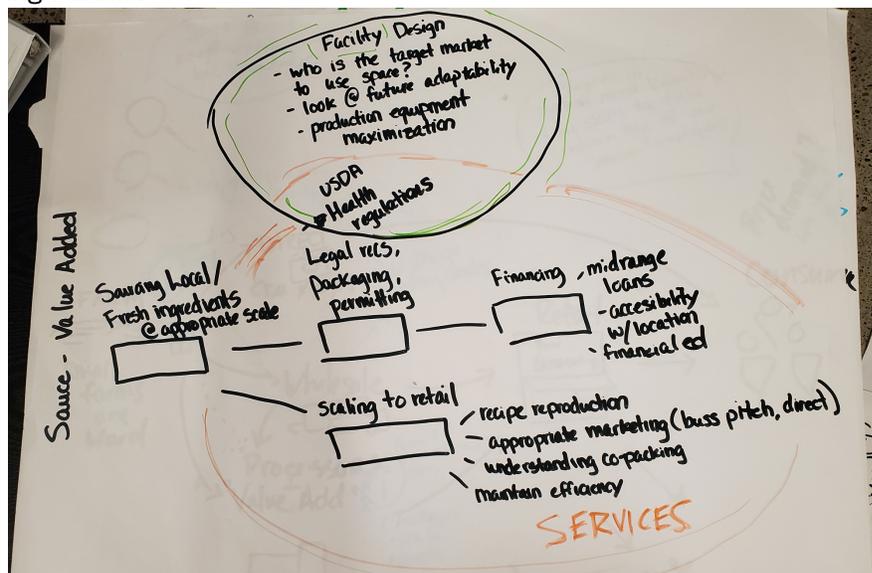
Challenges Identified

“Weak points” and “choke points” in the current system include

- The complexity of the regulatory and permitting environment,
- Lack of kitchen access,
- High startup costs for using kitchen space, and
- Challenges associated with becoming a permitted kitchen.

Sauce Production

In this diagram, PAC members depict the production of sauce starting with the sourcing of local ingredients.

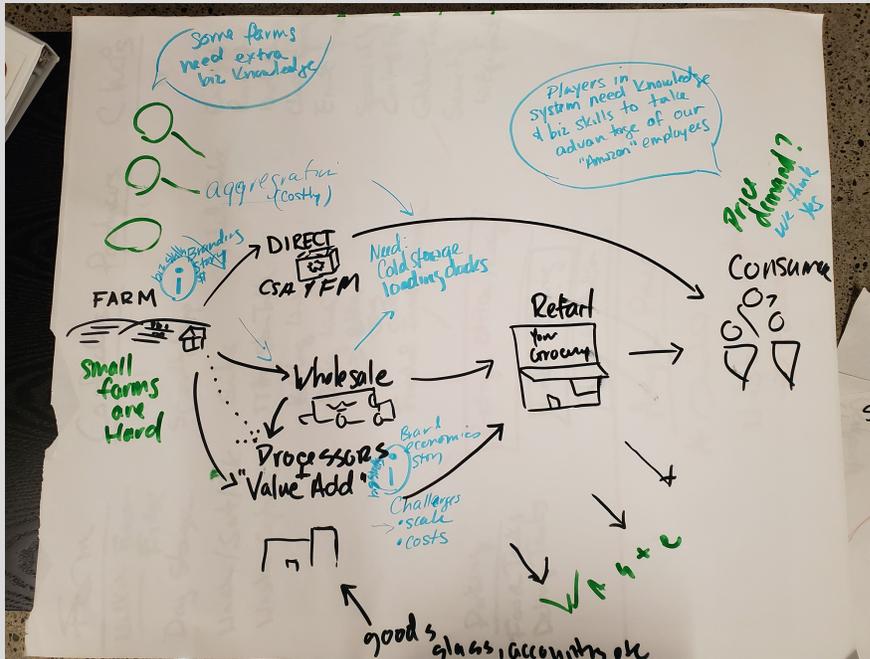


Challenges Identified

- PAC members considered many elements of the production and distribution process, including the need for producers to secure permits and financing.
- PAC members also described the process of scaling up to retail, which includes recipe reproduction, appropriate marketing, co-packing, and maintaining efficiency.
- PAC members also opined that services—technical trainings, access to funding, and business assistance—were also important elements in the local food system.

Direct Farm to Consumer

The diagram below shows the local food system moving from farms to consumers.



Challenges Identified

- Physical infrastructure elements like cold storage and industrial buildings with loading docks are a crucial need in the local food system.
- This diagram also states that some farms and players in the system are in need of additional business knowledge to be successful.
- PAC members depicted waste as leaving the system and stated that it is difficult for small farms to access distribution networks and consumers.

In the next section of this report, we delve into the concept of the local food facility and explore several food facility “components”—specific spaces within a local food facility that are designed for specific food-related uses.

There are potentially many different types of components to a local food facility. A local food facility might bring together cold and dry storage space, commercial kitchens, and processing and packing facilities; it could provide business assistance to food actors; or a local food facility could include office space, a food lab for testing products, and demonstration kitchens, or a combination of all of these things. The shape the local food facility could take can vary considerably and its ultimate form depends on the goals of its supporters, the existing

conditions of the local market, and the needs demonstrated in the local food system. For examples of local food facilities in other places, see Appendix C. Food Facility Examples.

3. Local Food Facility Opportunities Assessment

How Can Industry Challenges Be Accommodated by a Facility?

A local food facility could help local food businesses overcome lack of access to financial support and resources, as well as barriers to successful networking between local food actors. Investment and operating capital are scarce within the local food system, and there are gaps in facility and organizational resources. By providing a convenient and centralized facility that addresses these gaps in the value chain, a local food facility could help better coordinate the resources and knowledge local food actors need to operate efficiently and scale up their businesses.

Given the challenges identified in the prior section, a necessary step in moving the local food facility from idea to plan is understanding how these challenges could be overcome. This section seeks to summarize the key considerations that can inform the creation of a local food facility in the King County region.

A local food facility in King County could take many forms and have many physical “components.” Through our review of existing research and conversations with King County experts and PAC members, we determined that the following components would be the most critical for a local food facility in King County a) commercial kitchens, b) storage and distribution, c) contract packing, and d) value-added processing.

This section presents these four components in tables that assess their applicability for King County, stepping through the following questions:

1. What is the component?
2. Who are the typical users?
3. What role does this component play in the local food system?
4. What is the landscape of regional facilities and their rents?
5. What are existing need and specific gaps that are not being met?
6. Why is this demand not being met?

Special consideration is paid to the current gaps in the system, the current demand for these components, and where identified gaps and demand reflect the value chain challenges identified by our PAC members. A new facility will only be useful if it meets a demand, and helps overcome the challenges in the current system, at prices that local actors can afford. While King County’s large size and strong food and restaurant sector might lend credence to the idea that “if you build it, they would come,” these types of assumptions do not create a solid foundation to build upon.

This section also presents specific findings about the characteristics and conditions that influence each component. At the end of the section, we address additional uses and programmatic considerations (e.g. affordable fees) that will also influence the demand and viability of the facility. The building size, location, and site characteristics are addressed in the next section.

Demand can be expressed a range of ways. While we have sought quantitative data to help give shape to the scale of demand for facility components, definitive answers about demand remain unresolved.

Further quantification of the demand for the facility will be an important part of developing the business plan, finding tenants and users, and identifying their infrastructure needs and limitations.

Commercial Production Kitchen

<p>What is it?</p>	<p>A commercial production kitchen is a space available for food producers and entrepreneurs to cook and produce food. The space is typically available for multiple renters at staggered times over the course of a day or week. Some kitchens restrict the types of foods that can be produced, e.g. a vegan certified kitchen vs a “meat protein kitchen.”</p>	 <p>Kitchen Cru in Portland, OR (Photo credit: Kitchen Cru)</p>
<p>Who are the users?</p>	<p>There are a range of users for a production kitchen. Many are food entrepreneurs or established food businesses that have not scaled to owning their own kitchen. At the national level, top rental kitchen user groups are often caterers, food processors, and mobile food providers (Food Innovation Network, 2015).</p>	
<p>What role does this component play in the local food system?</p>	<p>Commercial kitchens range in scope and scale. Two primary categories for commercial kitchens are production kitchens and incubator kitchens.</p> <p>Production kitchens provide licensed commercial kitchen space, typically equipped with food production work and prep stations for canning, catering, and/or baking.</p> <p>Incubator programs provide additional services for kitchen users, including access to production facilities, business support services, and other resources tailored to young firms.</p>	
<p>What do we already know about user needs?</p>		
<p>What is the landscape of regional facilities and their rents?</p>	<p>Shared Commercial Kitchen Spaces: Research indicates that demand for commercial kitchen space in Western Washington currently outstrips supply. In King County, there are as many as 90 formal and informal shared commercial kitchen spaces, with most being shared informally. Recent studies show that many of these kitchens have four or more businesses licensed out of the same space. Most appear to be leased on an hourly basis.</p> <p>Incubators and Food Hubs: Our research shows that there are about 14 emerging food hubs within Washington state. While more than 60 incubators/accelerators exist across the Western Washington region, few cater to small and midsized food producers.</p> <p>Of our survey respondents, 37.5% selected commercial production kitchens as one of the most needed local food facility components within King County.</p>	
<p>What are existing need and specific gaps that are not being met?</p>	<p>Space, Facilities, and Equipment: Small food producers and entrepreneurs report that they are looking for <i>affordable</i> production kitchen space, ideally that is only shared with a limited number of other users (or dedicated space). In addition, they’re looking for more specialized equipment within these spaces. In the survey, respondents listed the following types of equipment as top preferences: packing equipment (50% of responses), cooking equipment/ovens/mixers (46%), dehydration equipment (42%), and bottling equipment (38%).</p>	

	<p>Business Support: Our research indicates that production kitchen users are challenged to access technical resources to help their businesses <i>scale up</i>. One survey respondent noted that “space to grow and expand” for users was critical, saying, “It’s great to have a small incubator kitchen to start food companies, but what about the next step in their growth?”</p> <p>Another challenge production kitchen users face is connecting with others in the food system, such as experts and mentors. Some studies indicate that many small food businesses are often run by families from diverse backgrounds, living in low-income neighborhoods. These food producers particularly need easily accessible and affordable kitchens coupled with support services.</p>
<p>Why is this demand not being met?</p>	<p>Commercial kitchens are expensive to construct, difficult to certify, and are frequently challenged to achieve positive cash flows.</p>

Storage and Distribution Space

<p>What is it?</p>	<p>Food is a physical good that needs to be warehoused before it can be distributed to markets and sold. What is unique about food is that many products have a short shelf life or are perishable and need to stay refrigerated or in a freezer. As one might expect, this is a core challenge in the food supply chain.</p> <p>Here we are referring to storage space that could be used for raw food products and ingredients and also finished “value-add” food products. Storage space can range from a minimally climate-controlled warehouse with racks and shelving systems to vertically oriented drive-in freezers that require a forklift for efficient operation.</p> <p>This type of food facility space also plays a role in the distribution of food products—food is taken from storage, loaded into delivery vehicles, and brought to market. The distribution stage of the supply chain requires space where food products can efficiently move from storage to delivery vehicle. This process can involve several steps—packing, wrapping, loading, etc. Consideration needs to be given to how the design and layout of storage space creates efficiencies for the distribution stage.</p>
<p>Who are the users?</p>	<p>Food storage space is needed for most actors in the local food system. Growers need, at the least, storage for staging raw food products before a distributor can pick them up. Food businesses need storage space for ingredients and then for their finished food products. Distributors need space for food products to pass through on the way to markets. Hunger relief organizations need storage space to take food donations before they can be distributed.</p>
<p>What role does this component play in the local food system?</p>	<p>Food storage is a critical component in the local food system. It provides resting space (even if it’s just brief staging) for food products along the way to markets.</p>

What do we already know about user needs?

<p>What is the landscape of regional facilities and their rents?</p>	<p>Recent studies show that in King County, there are at least 17 cold storage facilities and six major distribution facilities.</p> <p>While there are large warehouse facilities in South King County, there are limited options to accommodate small-scale dry and cold storage needs. Small scale food producers need storage space to hold product as well as drop-off points for customers and aggregation.</p> <p>Of our survey respondents, 50% selected “storage space (dry and cold)” as one of the most needed local food facility components within King County and 37.5% selected a similar option– “shared distribution [space]”. When asked about ways that food businesses could be boosted, some respondents mentioned cold or dry storage as a key method.</p> <p>Takeaway Quotes: If you had a “magic wand” what support would you offer local food and farm businesses to boost their businesses right now?</p> <p><i>“Lots of Cold Storage, no strings financial support, ongoing training for business including business plans, start-up capital, etc.”</i></p> <p><i>“Access to commercial kitchens, storage (cold or dry), business training, collaboration with other business - product utilization, mentorship with established and known businesses, marketing, and social media ‘showcasing.’”</i></p> <p><i>“Storage, distribution, co-packaging - and help accessing markets...”</i></p>
<p>What are existing need and specific gaps that are not being met?</p>	<p>Our research indicated that there is broad need for more food storage space. In particular, there was a consistent mention of the need for more cold storage.</p> <p>One stakeholder commented on this need in the PAC survey, also noting that affordable refrigeration space for smaller local food businesses can be particularly difficult to find: “Refrigeration space/walk-in fridges for holding pallets of goods are in short supply everywhere. Unless you’re doing 100+ pallets, you can’t work with the large refrigerated facilities/warehouses and it’s extremely tough to find space as a small supplier.”</p> <p>Another PAC survey respondent noted they “consistently hear that of needs/ gaps in cold storage and USDA certified processing facilities for smaller farmers” all across Washington State.</p>
<p>Why is this demand not being met?</p>	<p>The economics of storage are challenging. Storage is typically a break-even activity for a food facility; they are not core revenue generators. Cold storage in particular is a major expense for food facilities. Developing and operating cold storage systems are major costs for food facilities.</p> <p>To address these challenges one study recommended including a mix of higher-margin value-added products and to leverage other facility uses or corollary services (e.g. sales support, advertising, office rental) to balance out revenues.</p> <p>Food safety regulations were also listed as a barrier for food storage to be financially successful.</p> <p>To meet food safety regulations, it’s smart to over-invest in frozen storage within a given facility. However, it’s also good to provide funding for environmental upgrades—without funding, the costs of advanced tech that reduces energy uses/environmental impacts can be a significant incremental cost to the development project</p>

Contract Packing

<p>What is it?</p>	<p>Definition: Contract Packing or “Co-packing” is a process that involves businesses processing products for external clients using their inputs, recipe, label, branding, and specifications so that the client can later sell that product through their own markets.</p>
<p>Who are the users?</p>	<p>Co-packers engage with farms and food producers. They help scale product runs and connect food producers to markets.</p>
<p>What role does this component play in the local food system?</p>	<p>Co-packing adds value for farmers and local food producers by allowing efficient scaling of food production runs. Where a local food start-up may only be able to produce so many units in their own facilities, a co-packer can use inputs and information from the food business and produce their products at a much larger scale. This enables local food businesses to connect with buyers and markets that they otherwise would not have access to.</p>
<p>What do we already know about user needs?</p>	
<p>What is the landscape of regional facilities and their rents?</p>	<p>Recent studies estimate that there are approximately half a dozen co-packers in the western Washington region. However, these studies also indicate that few of these co-packers are setup to assist small to medium sized food companies.</p> <p>There are many food processing businesses across Washington—a similar business to co-packing. Most are not equipped—or regulatorily capable—to offer their services to external clients.</p> <p>According to one study, in 2016, only 17% of processors responding to a WSDA survey indicated that they were currently offering co-packing. Another survey found that 91% of farmer respondents were unaware of any existing processing facility that was underutilized or could be expanded. Due to this lack of co-packing facilities, some farmers/food companies reportedly take their products to Oregon to be processed.</p>
<p>What are existing need and specific gaps that are not being met?</p>	<p>There are processing facilities available in Western Washington, but they lack the ability to provide co-packing services to additional clients. Moreover, when co-packing is available, it is during narrow windows of time, as such co-packing services are available seasonally, during winter and fall months outside of the height of the harvest season.</p> <p>Co-packing was frequently cited in the PAC survey as a needed component in an LFF. When asked what type of support they would provide to local food businesses if they had a magic wand, one respondent wrote:</p> <p>“What will be needed is co-packing facilities (at mid-size levels) to take businesses to the next level of success, for job creation, etc.”</p>
<p>Why is this demand not being met?</p>	<p>Co-packing as its own business requires consistent and high volume food inputs; the economics of such an operation typically only work at a large scale. Food processors often lack the staffing and equipment needed to run their facility beyond current operations. In addition, processors need a template or business planning tool for managing a co-packing business process.</p>

Value Added Processing Space

<p>What is it?</p>	<p>Definition: Value added processing involves transforming a harvested product or animal product into a new product for consumption.</p>
<p>Who are the users?</p>	<p>The main users of value-added processing are farmers.</p>
<p>What role does play in the local food system?</p>	<p>Value added processing facilities help farmers transform their product into consumable, sellable products. These farmers can sell their products to other food producers or entrepreneurs.</p>
<p>What do we already know about user needs?</p>	
<p>What is the landscape of regional facilities and their rents?</p>	<p>King County has experienced growth in food processing, as the number of small, owner-operated food manufacturing establishments increased by 21% between 2009-2013. South King County cities make up more than one fourth of all food processor licenses. The City of Kent makes up the largest cluster of licenses, with Renton, Vashon, and Tukwila following.</p>
<p>What are existing need and specific gaps that are not being met?</p>	<p>Access to More Processing Facilities: Many farms in the Central Puget Sound and King County area are small to mid-sized in scale and are therefore challenged to meet minimums for food processors. One study discussed how one processor had a 500-pound minimum—above the product specific yield of many small farmers.</p> <p>Some farmers report that the lack of access to processing facilities has led to seeking ways to sell directly to consumers (e.g. farmers markets and direct sales).</p> <p>Specific Processing Facility Needs:</p> <ul style="list-style-type: none"> • Processing: produce for fresh markets; fresh fruits and vegetables into ready-to-eat products; fruit for puree and juices • Jarring and pasteurizing pickles, sauerkraut and fruit juices • Formulating, jarring and pasteurizing baby food • USDA inspected slaughter facilities and meat and poultry establishments • Warehousing and distribution that works for small food producers <p>When asked in the PAC survey what type of value-add production, packing, or processing equipment small- to mid-size needed most, respondents selected “packing equipment,” “Cooking equipment / ovens / mixers,” and “dehydration equipment” most frequently.</p>
<p>Why is this demand not being met?</p>	<p>Rising Costs/Consolidation: The lack of processing facilities in Western Washington can be attributed to rising costs for inputs such as land, labor, fuel, and equipment. The conversion of farmland to other uses has also decreased the local supply of crops thereby resulting in the closure of many food processing facilities. The loss of small- and mid-sized processing infrastructure has specifically been detrimental to small producers and those who sell specialty products for higher-value markets.</p> <p>Food Processing is Highly Regulated: When it comes to complying with regulations, small food processing companies are disadvantaged in comparison to larger companies due to a lack of resources. These regulations present barriers to the success and continuation of such small processing companies.</p>

Each of the four components described above illustrates the need for local food infrastructure and the challenges faced by local food system actors. Much of the data collected on gaps and demand for the four component tables reflect the value chain challenges identified by our PAC members. While these components were described discretely, they are part of intricately linked food systems and cannot be separated or considered individually.

The Need for Co-location of Uses

Systems rely on strong, functioning relationships and clear and efficient communication to be successful. A critical theme that emerged from our research and discussions with local food actors is the importance of the relationships between local food actors and others that support their business. We repeatedly heard that strong relationships with peers, other actors in the food system, and mentors were crucial elements for the success of a food entrepreneur’s business. For example:

- Local food entrepreneurs were interested in business training and easy access to regulators that could help them navigate the requirements of numerous certifications and laws.
- Hunger relief organizations rely upon relationships with food producers and distributors; their business model relies on strong relationships.
- Farmers can benefit from stronger connections with buyers and end consumers. These relationships can be hard to build without product tastings or similar experience.

Together, this type of feedback demonstrates interest in an additional component (or components) that should be considered for the local food facility, such as shared office space, large meeting rooms, side-by-side work stations for peer-learning, or an event space where local farmers/producers could host farm-to-table dinners or weekend markets. An event space could also be used by hunger relief organizations for fundraisers or temporary food storage during off-peak times.

Insights from the PAC Survey

ECONorthwest administered a 12-question survey that was targeted toward PAC members.

Survey responses made it evident that a local food facility that serves as an affordable “one-stop shop” would be best suited to meet the existing needs in King County’s local food system.

When asked to specify which of the following components were needed the most—production commercial kitchens, storage space (dry or cold), access to a co-packer or packaging equipment, ongoing business support, shared distribution, all of the above—respondents selected the “all of the above” option most frequently.

In their free response answers, respondents also stated the importance of a local food facility that brought together a wide range of services and that facilitated coordination across different areas of the local food system.

However, respondents also made clear that affordability was a key component for users to take advantage of the local food facility. When asked what conditions would need to be in place for local food businesses to take advantage of the needed components, about half mentioned affordability as a necessary condition. Concerns about affordability were a theme throughout the entirety of the survey.

Survey respondents also emphasized the need for storage space (particularly cold storage), that the facility be accessible (including after hours), and that the facility offer business training and financial support.

To continue moving the facility toward reality, consideration should be given to the “soft space” needs of local food actors. An assessment would seek to identify what types of spaces are more in demand by local food actors, how those spaces are used, how they relate or enhance other components of a local food facility, and a consideration for the economics of those spaces.

4. Local Food Facility - Physical and Spatial Considerations

The location of food facilities has a strong influence on the ability of local food actors to access and efficiently use the facility. Locations in the urban core might be close to buyers and more appealing for food facility workers that might live nearby. But urban real estate is expensive. Local food facilities in urban core areas need to compete with other uses for space; many of which have a greater tolerance for high rents.

For this reason, food production facilities are more commonly found on the urban periphery. Ostensibly, industrial buildings' food production facility characteristics include production areas and warehousing areas, truck loading areas, and small offices for managerial work.

This section explores the physical and spatial considerations that will influence the success of the King County local food facility. We look at the question of the facility's location both from the perspective of physical location within an urban region and also from the "inside-out" viewpoint of site/building characteristics that enable facilities to be successful.

Physical Location of a Local Food Facility

The local food facility's physical location will play a large role in determining who uses the facility and, ultimately, if the facility will be successful in the long run. Each potential location will have attributes—or *locational factors*—that will either lend to its success or become a challenge for the facility's operations and attractiveness to facility users.

As is the case with all real estate, no one location is likely to have a perfect set of locational factors for a local food facility. Each place has its own unique mix of pros and cons. The goal for finding a suitable location for the facility should be to identify locational factors that are "*must-haves*"—those that are absolutely crucial to its success. Those *must-have* factors should be prioritized above others. Secondary locational factors also play a role. One location may meet the baseline number of must-have locational factors but still not be suitable for the facility because secondary locational factors are not sufficiently present.

The relative importance of location factors depends on the activities that will take place at the facility, the needs of facility's users, and the proximity to their suppliers and customers. Moreover, where the functions of the facility lie within the supply chains of the food products that are produced or move through the facility will influence the location factors that should be prioritized. For example, a local food facility that has the primary function of being a production kitchen may want to prioritize a location that is accessible to local food businesses (the users) and their customers. Conversely, a local food facility that focuses on co-packing unprocessed agricultural products might seek a location closer to farms.

A local food facility is, after all, real estate. And the rules that guide the success of real property apply here. In Exhibit 3 below, we list several common locational factors that influence the success of commercial properties. Exhibit 3 provides commentary on how each of these factors may be considered for a local food facility.

Exhibit 3. Local Food Facility Locational Factors

Source: ECONorthwest

Locational Factors	What it is	Considerations for Local Food Facility
Local and regional accessibility	The ease by which the property can be reached.	<ul style="list-style-type: none"> ▪ Accessibility by whom is a key question. A local food facility will need a location that is accessible by key users, suppliers, and their customers. ▪ Traffic patterns and congestion have strong effects on accessibility. The local food facility should consider the impacts of local traffic patterns. ▪ Proximity to regional transportation networks—importantly highways—is a key consideration. ▪ Access to transit will be important for facility workers.
Proximity to complementary uses	The relative time/distance to similar uses and partner organizations.	<ul style="list-style-type: none"> ▪ At a basic level, similar industrial and production uses ease nearby would help the local food facility function without external hinderances on facility activities. ▪ Other complementary food production uses or organizations could amplify the effectiveness of the facility and the local food network in general.
Zoning and land use regulations	The policies and land use regulations that govern activities and uses at any specific property.	<ul style="list-style-type: none"> ▪ Local food facilities typically involve industrial activities and uses—food processing, storage (warehousing), distribution. For this reason, most local food facilities are located in industrial zones. ▪ Some facility activities, like commercial kitchens, are permitted in commercial zones. Although a combination of industrial and commercial uses would mean that the facility would have to locate in a zone that allowed all of those uses.
Infrastructure and utilities	The physical connections—roads, sidewalks, pipes, power lines—that connect to a property.	<ul style="list-style-type: none"> ▪ The transportation infrastructure at and around the local food facility will determine the ease by which users and suppliers can access it. Box trucks and tractor-trailers require varying sizes of turning, parking, and loading spaces. Consideration should be given to what types of trucks will need to access the facility. ▪ Food production can require industrial level utilities. Large ovens, packaging systems, and other equipment may require heavy-power or substantial water or gas lines
Visibility and exposure	The ease by which a property can be seen.	<ul style="list-style-type: none"> ▪ Visibility and exposure are crucially important to the success of retail properties specifically. If the local food facility is to feature a retail outlet, consideration should be given to the location’s general visibility and the specific positioning of the retail space.

A Local Food Facility location in the King County region

Our research and the survey of key stakeholders generally indicated areas south of downtown Seattle were preferred for a new local food facility. Survey respondents mentioned SODO⁸, Rainer Beach, and South King County as possible locations. The reasons given for these locations were proximity to farms, a diverse and growing population, access to highways and ports, and proximity to existing local food infrastructure.

It is important to recognize that a new local food facility will be but one node among a large food ecosystem. It may well be a powerful enhancement that strengthens existing food system linkages, but its location will play a large role in who can use the facility and how it complements the entire network of existing food system facilities. In the process used to seek out a location for a new facility, much consideration should be given to each location’s proximity to existing local food system assets. Several questions arise from this consideration:

- Are there existing clusters of local food system facilities or assets that would be greatly enhanced by a new facility?
- What linkages to existing food systems assets, suppliers, and buyers will be most important to the facility’s success?
- How is the “human infrastructure” of the local food system dispersed in the region? Is there a concentration of local food system actors in a particular location?

In essence, the placement of a new local food facility is about enhancing the existing local food system network. A location will best serve the entire network if consideration is given to how it is linked to existing nodes of activity.

Repurpose an Existing Building or Build New?

In the search for a location for a new local food facility, the question arises: should a new facility be built from the ground up? Or should an existing building get repurposed? Inherent in this choice are tradeoffs about cost and usability of the facility.

A newly constructed facility can be better customized to the needs of its users. Spaces can be optimally oriented. The facility’s design can be efficient and flexible to future needs. But new construction comes with a high cost. Purchasing a site and developing a new building is an expensive and time-consuming process.

Repurposing an existing building is typically less expensive than building a new building. Although this is not always the case. An existing building that is being repurposed for new uses may need to bring its building systems up to modern standards. Seismic upgrades, elevator systems, and other regulatorily’ mandated improvements can become prohibitively expensive.

However, repurposing existing buildings can many times be a less expensive choice than building new. An existing building that contained similar uses to those of a local food facility could allow for a “plug-and-play” situation. That is, the facility could move into an existing industrial building with little rearrangement or enhancement to the original spaces. The compatibility of a local food facility with existing buildings will depend on the uses that are to take place in the facility and the specific characteristics of the existing building.

⁸ SODO is the colloquial term for “South of Downtown”, a neighborhood of Seattle.

Local Food Facility - Space and Site Characteristics

In addition to location considerations, food facilities must also account for site and building characteristics that either lend themselves to an optimized facility or become a hindrance to its efficient functioning. Generally, food facilities require industrial style buildings. Exhibit 4 below describes site and building characteristics that would be beneficial for a local food facility. These characteristics are generalized; specific characteristic needs will vary for individual food facilities depending on the uses present at the facility.

Exhibit 4. Local Food Facility Building and Space Considerations

Source: ECONorthwest and Graham Baba Architects

Building Space and Site Factors	Considerations for Food Facility
Facility Space Considerations	<ul style="list-style-type: none"> ▪ One Story – to avoid issues with elevator requirements and to allow for skylights (that can decrease lighting costs). ▪ Open Column Spacing – to allow for flexible floor layouts and ease of installing large equipment. ▪ High Bay Clearance – at least 12’ to 16’ to allow for efficient storage systems and movement of lifts. ▪ Dock-High Door(s) – these allow for large trucks to be loaded without a lift; the most efficient method. ▪ Seismic/Modern Structure and Building Systems – If the building is older, and especially if it’s made of unreinforced masonry (URM), it will require structural upgrades. Depending on local building regulations, sprinkler systems may also be required. ▪ Upgraded Utilities – food production facilities require plentiful potable water, adequate sewer connections, and, in many cases, heavy industrial power and gas connections.
Facility Site Considerations	<ul style="list-style-type: none"> ▪ On-site parking – for employees and visitors. ▪ Truck access and turning areas – for truck loading, unloading, and parking. ▪ Easy ingress/egress points – entrances to the facility grounds need to accommodate slow turning trucks and ease of access by users. ▪ Open yard area – Open yard areas can add flexibility to facilities by providing space that can be used for product staging and loading, or for events.

Facility Programmatic Use Considerations

In addition to the general building and site considerations presented above, specific uses at the food facility will require careful consideration of their scale, layout, design, and compatibility with other uses. In particular, commercial kitchen space and storage space require additional considerations. Exhibit 5 summarizes some of the key points raised in our research about these two facilities' uses.

Exhibit 5. Programmatic Use Considerations

Programmatic Use	Considerations for Food Facility
Commercial Production Kitchens	<ul style="list-style-type: none"> ▪ Size – Our research indicated that scale is important for commercial production kitchens. Smaller kitchens are likely to have higher overhead; the right balanced size would accommodate a range of food products at various scales of production. ▪ Equipment – A commercial production kitchen is not just a space for food producers to work but provides them with access to specific—and usually expensive—equipment. Ovens, mixers, ranges—these professional grade cooking equipment are a key part of what helps small food producers efficiently scale their businesses. ▪ Adjacencies to other uses – A production kitchen is a core value creator for a local food facility—its where raw inputs are processed into food products. For kitchens to be most efficient for small food producers, they need connections with other uses at the facility. For example, one local food stakeholder described their ideal setup as an all-in-one facility. In this concept, a food producers could store raw ingredients, use the production kitchen to make their products, and then store those products in onsite cold or dry storage. ▪ Kitchen Management – Managing a commercial production kitchen is challenging and requires trained and detail-oriented management. Issues arise in scheduling multiple users with an ever-evolving schedule, keeping the kitchen clean and ready for the next user, maintaining health code compliance, training users for proper use of kitchen equipment, and regulating-space behavior.
Storage and Distribution	<ul style="list-style-type: none"> ▪ Size and layout– Multiple food producers operating at various scales will require flexible aggregation, warehousing, and cold/frozen storage. For a facility to serve growing food businesses, the storage space should be adaptable to accommodate various scales. Storage space layout and ease of moving products through the warehouse and to/from trucks is also a major consideration. ▪ Cold/frozen storage – Many food products require constant refrigeration. Some food businesses focus on creating frozen foods. Blast chilling raw food products like berries can be an inexpensive way to add value to raw food products. At a foundational level, a food facility needs cold storage to be functional. Cold storage can be oriented in several ways. It can be horizontal—the most efficiently layout. Some cold storage areas are vertically oriented. This design cuts down on floor space but requires lifts to access products and a detailed product tracking and shelving system to find and proper store food products. Cold storage is one of the most expensive food facility uses to build and to operate.

5. Recommendations

Food Facility Can Address Some, But Not All Challenges

For this study, we used multiple methods to understand the challenges and opportunities in King County’s local food system that could be positively impacted by a new food facility. At a foundational level, our research confirms what many in the local food system already know: there are real friction points in the local food system that hinder its overall efficiency and influence the full range of food system actors. For example, we found that:

- Despite the presence of many commercial kitchens in the Seattle region, food entrepreneurs still struggle to access affordable kitchen space.
- Small scale food distributors have logistical challenges aggregating small farm products and efficiently bringing them to market
- Local food producers find it hard to access kitchens, storage, and a distributor to effectively scale their companies.
- For most local food facility components, a local food producer’s ability to take advantage of services offered depends on the affordability of services and accessibility of the facility in terms of hours and location.
- Hunger relief organizations have inefficient supply chains due to the lack of affordable warehousing space—especially cold storage space.
- Many local food producers desire business support and training services to help them thrive and scale up their business.

A new local food facility presents an opportunity to ameliorate some or all of these challenges. By providing a one-stop location for local food system actors to meet, build their businesses, and work together to solve food system issues, a local food facility could enhance existing food system relationships and propel emerging food businesses.

However, to do so effectively will require careful consideration of a range of issues. Who is the target audience for the facility? Where should it be located? How would it connect and interact with existing food systems facilities? These are questions that should be considered by advocates of a new local food facility. Understanding the tradeoffs inherent in these questions—and others—will help navigate the idea of the facility to the creation of one that effectively solves local food system issues and strengthens the entire local food ecosystem.

We have several thematic recommendations for the local food facility. These highlight factors that deserve consideration for the development of a new facility. Our recommendations are intended to provide direction on the general focus of the facility; they are a synthesis of our understanding of the landscape of the local food system and the interests and capacities of the partners that have come together to promote the facility.

Recommendation: A Pathway to a Successful Food Facility Needs a Targeted Focus

Our research has helped illustrate the landscape of the local food system in the King County region. We understand the challenges and see that a new food facility is an opportunity that could greatly reduce frictions within existing food system networks. However, how the facility does this and where along the value chain it targets enhancements will make a substantial difference in its level of effectiveness. A facility that tries to solve all food system challenges might only manifest diluted interventions to food system challenges. Moreover, a pathway to a successful food facility needs a targeted focus. It should focus on doing a few things and doing those things very well.

One facility cannot solve all food system problems and a new facility will be but one node in a large network. Ideally, the new food facility is just one of several or many new or improved local food system assets; for any system to function efficiently, it requires not just one but many efficient nodes of activity and strong relationship between those nodes.

Recommendation: The Facility Should Help Business “Scale Up”

Our research indicated that there are frictions all along the food value chain. So where should scarce resources be focused to enhance the entire food system? We see the most acute opportunity for a local food facility to be in scaling existing food businesses and food related activities. This would mean working with existing food incubators to identify food businesses ready to advance beyond the startup phase.

Our research indicates an acute scarcity of local food infrastructure that serves small to medium sized food companies. The purpose of the local food facility should be to help small but established food businesses move from a startup phase to a stabilized/consistent growth phase. It should focus on “graduating” these businesses and moving them into the more traditional food industry market.

What this would mean for the facility would be food facility components designed, sized, and linked as a one-stop shop for growing food businesses. “Must have” components would be a commercial production kitchen (or kitchens), ample storage space (both cold and “dry”), and additional flexible space to be used for contract packing, temporary storage, or other more sporadic or seasonal activities that arise.

Although the focus would be on emerging food businesses, the facility would also serve a full range of food system actors. Hunger relief organizations could use the flexible space for temporary storage of food donations. Buyers would have one centralized place to seek out new food ideas. Small distributors could lease space to store and prepare their inventory for market.

Recommendation: The Facility Should Connect Businesses and Knowledge

The success of the local food facility will be linked to the strength of the partnerships and collaborative relationships that emerge through the activities and work that takes place there. In

our discussions with local food system actors, we heard again and again about the desire to foster better relationships with their peers and to have better access to mentors and experts. While this recommendation may seem peripheral to the need for physical food system infrastructure, we actually see it as a crucial need in the local food system and a role that should be central to a new or improved local food facility.

The focus on connections means that the facility should feature office and event space. The nature of these spaces could take several forms. The facility could lease office space to food businesses or offer shared office space as part of a membership package. Event space would allow for meetings, trainings, food shows, and other types of events. Locating event space at the facility will draw in local food actors from across the food system, which will give the food community a recognizable location to share, learn, and innovate together.

6. Appendix A. Detail on Methods

To complete this report, we assessed recent studies that address challenges in the local food system. Exhibit 6 provides a concise guide of the core studies that we reviewed and which facility components they addressed. A full list of studies is presented after the table.

Exhibit 6. Overview of Previous Studies

Study	Year	Author	Concepts Evaluated					
			Commercial Kitchen	Storage	Co-packing	Value-add Processing	Dist. space	Other
Puget Sound Food Infrastructure Exploration	2019	Ecotrust	X	X	-	X	-	X
Produce Processing Facility Feasibility Study	2017	SnoValley Tilth	-	X	-	-	X	-
Food Production Space Needs Assessment	2017	Port of Seattle	X	X	X	-	-	-
Value Chain Strategies for Source-Identified Minimally Processed Produce for the School Market	2018	Washington State Department of Agriculture	X	X	X	X	X	X
Food Processing in Western Washington	2012	Urban Food Link	X	-	X	X	-	-
Food Processing in Washington State	2014	Katherine Getts	-	-	X	X	-	-
Washington State Agriculture and Food Processing Economic/Fiscal Impact Study	2015	Community Attributes Inc.	-	-	-	X	-	-
Food Business Incubator Phase 1 Feasibility Study: Entrepreneurial Assessment and Market Study	2015	Food Innovation Network	X	X	-	X	-	X
Snohomish County Food Hub Business Plan	2018	Community Attributes Inc.	X	X	-	X	X	-

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Survey Instrument

ECONorthwest administered a twelve-question survey via the online platform SurveyMonkey that gathered feedback about how to enhance King County's local food system, the most crucial elements of a local food facility, and the needs of local food facility users and buyers of local foods. The survey was targeted toward PAC members and other local food advocates and received 24 responses between the first and third weeks of February 2020.

Respondents represented a wide variety of roles across the local food system from local farmers, public health officials, local entrepreneurs, food buyers, manufacturers, and managers and directors of food justice focused non-profits and food banks.

Insights from the PAC survey are incorporated throughout this report and provide local perspective on the unmet needs and challenges within King County's local food system and how a local food facility could best address those needs.

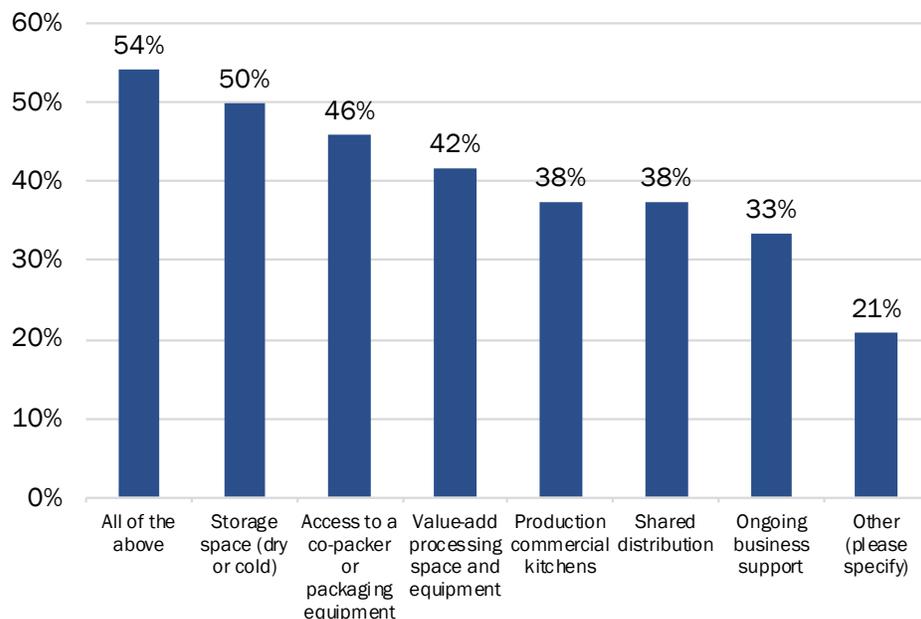
7. Appendix B. Survey Responses

This appendix includes the questions asked in and the responses to the PAC survey. Responses are provided verbatim and have not been edited for spelling, punctuation, or language.

1. What is your role in the local food system?

Response No.	Responses
1	Funder, advocate, facilitator
2	Executive Director - Food Bank
3	academic
4	Developing a Food Innovation District & Center in Rainier Beach (Seattle)
5	Technical assistance provider
6	Port district, movement of goods. Funding city efforts in economic development - some of which have involved Farmers Markets (Shoreline), wine industry engagement (Woodinville), and commercial production spaces (Renton.)
7	National non-profit, CDFA, supporting King County's work through our grant with the W.K. Kellogg Foundation.
8	Consultant with small food producers and retailers
9	Processing and Marketing .
10	Manager of a food bank farm in South King County
11	Nonprofit farmer, educator, and advocate
12	Started a small baking business; concerned citizen and donor of produce from home
13	Co-Director for nonprofit, 21 Acres Center for Local Food & Sustainable Living
14	I work for Seattle Public Utilities (City of Seattle) to prevent commercially generated food waste and increase food rescue.
15	Farmer and value added producer.
16	Government (Public Health) supporting community groups who are working on food access and food justice.
17	Owner of a commissary kitchen and a catering company. Purchaser of food from local farms and distributors
18	Manage food waste prevention programs for King County, including food rescue.
19	Commissary kitchen owner and catering company owner
20	Project manager for developing shared commercial kitchen to incubate new food businesses.
21	Farmers Market staff
22	Manufacturer/Retailer
23	Founder of local cold brew coffee company
24	Non-Profit org addressing food justice/food insecurity, job creation and economic development in Rainier Beach

2. Based on your knowledge of the local food infrastructure already present in King County, which physical local food facility components do local food businesses need the most? (Check all that apply).



Response No.	Other (please specify) Responses
1	Food safety technical support
2	WSDA Inspected meat processing facilities
3	refrigerated vehicles and drivers
4	This is my assumption, not based on much background.
5	Cold chain delivery / distribution. Local refrigerated / frozen trucks available for rent or through a delivery service for pallet delivery nearby.

3. Thinking about your answer to the previous question, if a local food facility offered the component that you think is most in need, what conditions would need to be in place for local food businesses to take advantage of it? Some conditions might be affordable fees, easy access, specific equipment, etc.

Response No.	Responses
1	Affordable, conveniently located
2	Common cause, procedures, and governance
3	Strong and consistent management of the facility
4	Location (savings in transportation costs) and affordability. While in short supply, some facilities do exist but they are not affordable to everyone due to competition
5	Affordable fees and accessibility

6	Not sure locally. Across Washington state, I consistently hear that of needs/ gaps in cold storage and USDA certified processing facilities for smaller farmers. Wine industry in Woodinville has some very unique opportunities that the city is investigating.
7	Specific equipment to handle the produce that local farmers wish to produce. Should also be a specific structured entity to allow for smaller entrants in the marketplace to participate (ie. small farmers).
8	Scalability and adaptability to different needs/food products
9	Affordability, close proximity, 24 hour access
10	Affordable fees, location accessible by transit and car, appropriate amount of parking, access throughout the day and night, secure storage, support with permits and food safety requirements, clear communication around project
11	affordable fees, easy access, storage space for tools/supplies
12	Affordability Capacity for expansion of co-packing
13	Ease of use that could include affordability, flexible/adaptable space, equipment, loading docks. But the success of using any of these elements might ultimately rely on strong, committed collaboration of the users so that resources are shared appropriately, skills and business opportunities are leveraged and information is collected, tracked and shared which can foster collective trouble-shooting. How could collaboration across users occur instead of continuing competition?
14	Clean, affordable work area. Storage is critical with the food handling laws. Scalable fees so there is room for entry level people and room for more mature businesses to grow.
15	Cost is crucial. The cost to utilize infrastructure becomes a significant barrier for smaller entities participating, and creates inequities in who benefits from public investment. Additionally, there is a need to design infrastructure with all communities in mind (very diverse user set) and have programs/training related to the infrastructure transcreated so they are culturally accessible for all potential users. Location and hours are also a key issues to make this accessible. Location should consider supporting south King County growers and smaller scale growers to boost the potential for production, distribution, and value add. A constellations of infrastructure would be beneficial for building access and resiliency in the food system.
16	Affordable fees and convenient location for deliveries
17	affordable fees, easy access, specific equipment seem fitting. Unsure what to add as we have not determined the biggest needs yet.
18	Space to grow and expand. Its great to have a small incubator kitchen to start food companies, but what about the next step in their growth?
19	Incubator commercial kitchens and technical assistance for food businesses to get their start. A facility that is not just motivated by profit; perhaps a non-profit and public/state partnership.
20	easy access in terms of location and hours of operation, maintenance of equipment/facilities provided, affordable fees, easy load in and load out options for pallets
21	Affordability, access flexibility (24/7), cleanliness and convenient location.
22	Refrigeration space / walk in fridges for holding pallets of goods are in short supply everywhere. Unless you're doing 100+ pallets, you can't work with the large refrigerated facilities / warehouses and it's extremely tough to find space as a small supplier.
23	Local food production/growers pipeline, very affordable fees, access to facilities close to affordable places to live, access to transportation, business support

4. If you had a “magic wand,” what type of support would you offer to local food and farm businesses to boost their businesses right now? Support could include access to commercial kitchens, storage (dry or cold), or processing equipment, business training, financial support, etc.

Response No.	Responses
1	Business training, financial planning
2	Access to capital and resources
3	Access to well-organized and managed aggregation and storage facilities
4	Access and ownership of land, storage, and retail space.
5	Technical assistance and market access
6	Don't know
7	Storage, distribution, co-packaging - and help accessing markets if needed (but I suspect that markets exists already)
8	affordable distribution access
9	Easy access to right sized markets, farm based WSDA meat processing, financial support
10	access to both dry and cold storage, grants for small farmers, support accessing and owning land for new and beginning farmers
11	access to commercial kitchens, storage (cold or dry), business training, collaboration with other business - product utilization, mentorship with established and known businesses, marketing, and social media "showcasing."
12	Very inexpensive co-packers Expansion of Farmstand Local Foods capabilities with vehicles and drivers Capacity building on the demand side
13	All of the above is needed – for businesses and nonprofits that could be synergistic (food banks, meal programs, social services tied to food). In addition, mentorship vs business training and ways to embed cross-sector problem solving that drives down waste, increases food access and fosters resiliency in food enterprises.
14	co-processing, storage, distribution, scientific help with formulating for products.
15	- Develop nodes of combo aggregation and commercial kitchens scattered around south king county. - Subsidized land and tailored training for new POC growers.
16	Business training and start up funding
17	All of these are a fit: access to commercial kitchens, storage (dry or cold), or processing equipment, business training, financial support. But this is based on a few conversations. We have not yet been able to identify where to start to identify biggest needs or where we can make the biggest impact in supporting them.
18	equal access to capital
19	Everything mentioned above on survey question #1 will help boost food/farm businesses now, and are already available or in process now to some extent. What will be needed is co-packing facilities (at mid-size levels) to take businesses to the next level of success, for job creation, etc.
20	Probably a King County Co-packing site, affordable cooler space to small farmers (under 20 acres), and financial support (small scale loans with minimal interest)

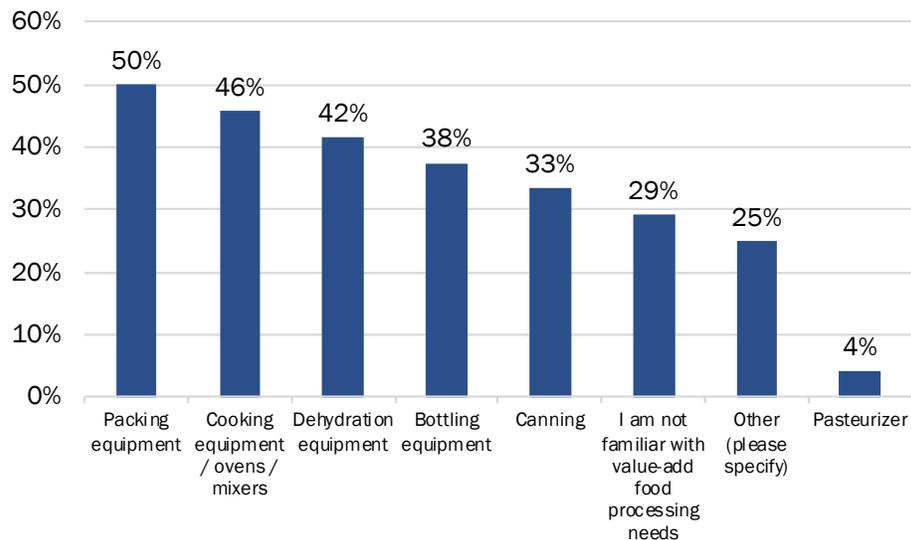
21	Commercial kitchens with dry/cold/frozen storage.
22	Cold storage and cold chain delivery or truck rental for regional shipping. All options are incredibly expensive.
23	Lots of Cold Storage, no strings financial support, ongoing training for business including business plans, start up capital, etc.

5. Following up on the previous question, what conditions would need to be in place for local food and farm businesses to take advantage of the support you described? These could include affordable fees, convenient location, access to select equipment, connections with select organizations, etc.

Response No.	Responses
1	Willingness
2	A source for food system development that builds a pool of funds accessible through micro loaning or grant making. Resources that work like a tool library to include kitchen gear, processing gear, all the way up to refrigerated trucks for short-term usage.
3	Strong private or public sector leadership
4	A local network coordination allowing aggregation and access to larger/multiple markets
5	Partnerships with market makers (groceries, farmers markets, etc)
6	Don't know
7	Affordable access and proper equipment. Perhaps a structure that allows small farmers/producers to access larger buyers. Obviously a great and convenient location too.
8	access to capital with criteria for businesses ready to take their product to market
9	Competitive pricing, technical assistance with connecting to resources, sliding scales for fees and sales supported by outside funding to make up the differences.
10	Accessible by transit and car, open 24/7, offered in multiple languages, financially sustainable
11	convenient location, accessibility, security, collaboration/partnership with other organizations, affordable fees, buy-in for upkeep/maintenance of equipment and facility
12	affordability marketplace locations for retail sales
13	I agree with all of the examples above. In addition, these businesses (and nonprofits?) need robust understanding and access to effective supply chains that will share data, collaboratively address resource issues and seize opportunities. To do this, they would likely need help establishing data collection, systems to analyze the data and see the opportunities in real time. Communication is central and must be easy.
14	Not sure.
15	Cost subsidies, trust in the management, culturally appropriate training, strong equity analysis in the project development
16	Need to know it exists, where to get it and make it easy to access
17	As stated above, not certain what I can add other than it would be beneficial to all if all stakeholders were in the loop with each other (communications).
18	investors, finance options

19	Affordable fees, which may require smaller facilities and non-profit/state/public partnerships. There are many good, local, non-profit organizations already working on these issues. They need to be partnered with!
20	for a copacking space, you would need the actual physical space, someone to run it, employees to do the copacking, etc. For small coolers you would need a convenient location and some way to fund the start build out There are several non-profits that provide small business loans - ventures is one example
21	Affordability, access flexibility (24/7), cleanliness and convenient location.
22	Ease of access, good central location, ideally plenty of parking, and loading docks / bays.
23	Access to a network of experienced business owners who mentor from the ground up.....no strings attached. Connection to others in perhaps a cohort of new business owners who work together consistently from inception to fruition and beyond. Support and mentoring and financials throughout

6. For those with knowledge of value-add/food processing, what type of production, processing, or packaging equipment do small- to medium-sized food producers need the most? (Check all that apply).



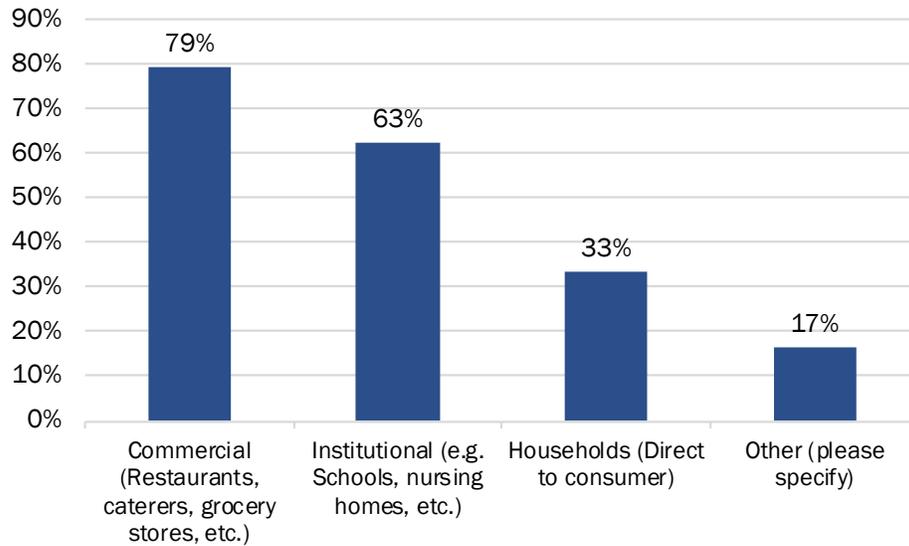
Response No.	Other (please specify) Responses
1	The regional challenges/ opportunities make it hard to focus on one of these.
2	You'll need to pick and focus based on capital and market focus
3	Flash freezer
4	I don't know enough about value-added except that this process also offers opportunity to extend the shelf life of rescued/recovered food. I wonder about value added processing that could also create a revenue stream for CBOs while showing additional ways to address food insecurity.

5	Do not have the knowledge to say what is needed most.
6	Cold and Dry Storage, Labeling Equipment, easier access to learning how to get a food processing license for "high-risk" food items such as salsas, hot sauce, dressings, etc.

7. How else could a local food facility best enhance King County's local food system?

Response No.	Responses
1	Diversity of va products, additional \$\$ to producers, resiliency
2	Create a define the system; publicize its existence and how to access its resources; offer incentives for use of its outputs such as products or produce, or restaurants/catering
3	Have direct retail and job opportunities
4	Bring together resources where needed. For example, include technical assistance support in facility. Or having distribution capabilities built in if a kitchen/production facility. Basically, if not as accessible location-wise, then include more services at the facility to make it more worthwhile to utilize.
5	Not sure.
6	Create funding structures to go side-by-side with the facility. Invest with affordable low interest loans into the smaller farmers to drive their engagement.
7	Start with what part of the food system will get the most traction. Translate those into food products and raw materials available locally. This will narrow down the broad possibilities of all things to all people/products.
8	Support growers of all scales, not just more established or financially viable businesses to address multiple barriers to the marketplace.
9	Be community informed and led. Offer programs and communication in multiple languages and throughout the day, find ways to connect with folks at the very beginning levels through more advanced levels, offer childcare and support for families
10	collaboration with more prominent organizations to decrease the cost for smaller and medium-sized businesses/operations, several locations throughout King County and partnerships with nearby counties (Pierce, Kitsap, Snohomish) for participants not in Seattle proper areas
11	Provide grants to farmers to take advantage of copacking Building demand from wholesale and retail buyers
12	Ideally it knits together shared values/goals around preventing food waste, repurposing what can't be prevented, demonstrating collaborative problem-solving that leads to long-term business success and community health. This kind of facility might also be a community connector – depending on scale and tenants – around food.
13	Get public funds to staff the co-packing plant so each business doesn't have to re-invent the wheel.
14	Building food culture! As long as equity and accessibility (especially end user cost), there is significant opportunity to build a pride in place around local food (leading to healthier communities, commitment to sustainability and climate justice, and stronger economic returns for KC residents).
15	Contribute to meeting county food waste goals.
16	Marketing of the brands that are produced locally
17	It helps food businesses scale, creating more jobs and opportunities on top of viable tax revenue.
18	Pasteurization access would be hugely beneficial. Very few options in the whole PNW for all types: HPP and heat.

8. What type of buyers (market segment) do you think provide the most opportunity for a local food facility in King County? (Check all that apply).



Response No.	Other (please specify) Responses
1	Not sure
2	Food banks, meal programs and other nonprofits that need greater access to local, seasonal food which also meets cultural needs. Granted, these "buyers" don't have the budget that commercial entities can support.
3	We should utilize policy to redirect institutional funding to support the local food system (such as Good Food Purchasing, or 5 cents for local produce)
4	Truly all of these apply for different reasons.

9. For those of you who are buyers of local food, what changes to local food infrastructure or the local food system would help you better serve your customers?

Response No.	Responses
1	NA
2	Shorten the distance from grower to consumer. Better communication within the system on product availability and shelf life to reduce waste. See responses above to access to capital and resources.
3	Logistical solutions to by-pass current government bureaucracy, providing multi-lingual one-stop shop for farmers of color, so they can focus on growing produce rather than permitting, sales & marketing.
4	N/A
5	Ease of access and consistent product. Supporting small farmers with fair rates and equal access too.
6	distribution, visibility, consistent availability, consistent quality, scalable volume

7	Access to spaces outside of business hours, more cold/dry storage, better shared communication systems and tracking
8	more local products/items which would cut the ecological footprint on food items being shipped to Washington State as well as increase jobs and wages in the food systems, better foods can be served to the schools,
9	More value added farm products
10	n/a
11	The food hubs work! More of those in areas that are not currently serviced by farmstand local or 21 acres
12	Uncertain other than accessibility, prices that low-income families can afford.
13	access to more local farms
14	Not a buyer
15	Cold/frozen transport. Raw ingredient processing. Co-packing.

10. From your perspective, where would the local food facility ideally be located? Be as specific as you can (you could provide a specific neighborhood, for example).

Response No.	Responses
1	where in King County is affordable?
2	I like the idea of hubs with central purpose. For example in the South end (closer to growers) have a distribution point as the primary operation with satellite operations including commercial kitchen, restaurant incubation opportunities, access to permitting once per week, etc. The hubs would be smaller than a giant single location that attempts to be a one stop shop and disperses resources to up to three smaller 'hubs' that are sited according to their proximity to aspects of the food system.
3	Rainier Beach
4	I don't believe it has to be in a prime location (unless there was a retail/market element) if you can include more services and capabilities in that one location. I would rather see a large-scale facility that serves many needs at a low-cost located further away than a smaller-scale facility close by that meets a smaller range of needs.
5	Not sure
6	Do not know.
7	Burien/Tukwila
8	South King County, Kent/Auburn specifically
9	Kent, south of downtown.
10	Georgetown (East Marginal Way), Belltown, Sodo (somewhere on 1st Avenue), Capitol Hill (somewhere near Seattle Community College area), Northgate area, White Center, Tukwila, Chinatown area
11	As close to I-5 as possible, near Seattle
12	South Seattle (Rainier Valley?) North Seattle South KC
13	Near transportation.

14	Varied. Initial emphasis should target underserved areas like South King County and the Rainier Beach Food Hub. There should be more community-oriented spaces (commercial kitchens tied with cultural spaces, preferably near growing space) as well as more industrial/on farm infrastructure (aggregation, storage, processing)
15	Sodo
16	If only one, probably close to Seattle, though out in county. Depends on all the stakeholder's needs.
17	SODO
18	Located next to major transportation routes, with available space to expand if needed. Cannot offer specific location,
19	Sodo
20	We really need something in the North end: North Seattle, Shoreline, Lynnwood.
21	SODO, Georgetown, Beacon Hill, Columbia City, South Park
22	S. King County

11. Why do you think that this is the ideal location for the local food facility?

Response No.	Responses
1	See response to Q10
2	Gateway to Seattle, access to transit & highways, airport, and home to currently higher unemployed workforce.
3	N/a
4	rental costs, freeway access, trucking access
5	There is a lot of farming in South King County with very little support or infrastructure, especially for new, immigrant, and refugee farmer.
6	This area is very well situated in South King County, where almost all of the need is concentrated. There are relatively good bus lines and access from many major highways. There are existing businesses and farms in Kent as well as plans for more expansion. Buyers from Seattle have expressed ability to come to this location but it is still to residents who will be utilizing the site.
7	I listed areas where there's diversity on all levels (ethnicity, culture, race, religion, education, economics) - inclusivity and cultural sensitivity are very important
8	Easy access
9	<p>South Seattle could serve active community-based food access/entrepreneurship goals and be close enough to serve King County. It might be convenient to I-90 access for KC farmers.</p> <p>However, given traffic, a South Seattle location likely wouldn't serve North Seattle. A northend location could have faster connections to Skagit/Snohomish farmers.</p> <p>South KC location could best connect with growing diverse population in KC and serve as a model for future Seattle locations.</p>
10	Self-explanatory.
11	Accessibility and equity
12	Close to freeway. Easy Seattle deliveries. Accessible for people to get to and from work
13	central location
14	N/A

15	it's close enough to downtown Seattle and there's enough space for parking, load in, etc.
16	It would serve under-represented Northern producers, open up new sales opportunities.
17	Good ease of access to roads for large trucks, generally plenty of space / warehouse options, near both I99 and I5, in between Everett and Tacoma, and nearby central Seattle.
18	Close to S. Seattle, between the airport, the port of Seattle, the city of Seattle and the city of Tacoma, close to I-5. It's also where people are moving to that is almost the last bastion of affordable housing in the area without going too far out of the city. A location in S. King County would bring benefits to both Seattle and Tacoma

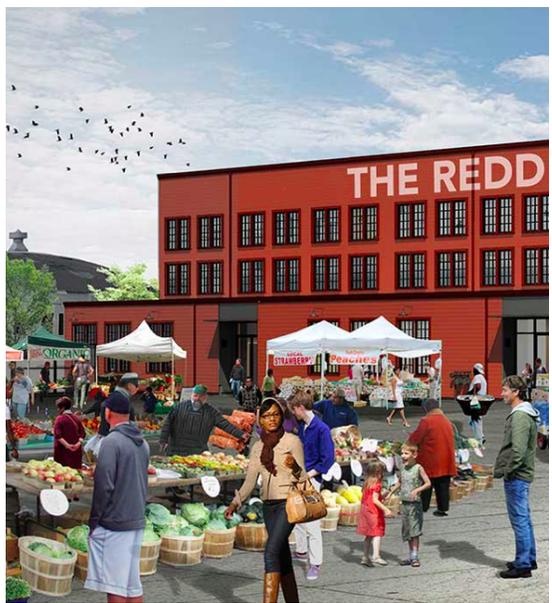
12. What is your favorite local King County food?

Response No.	Responses
1	Beechers Cheese—really any cheese
2	No favorite, but love the diversity of cultural offering
3	Hood Famous cheesecake
4	Not sure.
5	berries
6	Snap peas from Twinkletoes Farm
7	Snap peas from Faith Beyond Farm in Enumclaw, WA
8	Seoul Barbque or Taco trucks
9	Fresh veg
10	Roasted salmon
11	No favorite
12	Thimbleberries, heirloom Rosaceae trees, lettuces
13	Berries
14	Greens, local produce in grocers or at farmers markets.
15	oysters
16	Nothing comes to mind. There needs to be more of it!
17	strawberries
18	Pot Pie Factory, of course!
19	Beecher's Cheese
20	Molly Moons

8. Appendix C. Food Facility Examples

Local food hubs have been defined by the United States Department of Agriculture (USDA) as organizations that coordinate the aggregation, distribution, and marketing of source-identified food products from both local and regional producers in order to “strengthen their ability to satisfy wholesale, retail and institutional demand”.⁹ By virtue of this definition, local food hubs help increase market access, add value to the food distribution system, and contribute to economic, social, and environmental change. Moreover, local food hubs are useful for helping smaller businesses scale up in order to meet growing demand for local food.

With the expansion of local food hubs across the country, there are a number of successful example hubs that aspiring organizations can look to. The following tables present six different local food hubs that we have examined and presented to our PAC committee with the hope of identifying which food hubs and food hub elements would best meet the needs established for a local food facility in King County.

The Redd – Portland, Oregon	
<p>The Redd is a local food facility located in Portland, Oregon. It has a non-profit model and was incubated by EcoTrust. The Redd campus has two buildings on two city blocks in the central city area of Portland.</p>	
<p>Core Focus</p> <p>Increase availability and affordability of local foods.</p> <p>Build strong local food system enterprises.</p>	<p>Development Program</p> <p>Storage</p> <ul style="list-style-type: none"> • Dry/Cold • 15,000 SF total <p>Co-packing: None</p> <p>Processing</p> <ul style="list-style-type: none"> • Space and equipment available for rent <p>Commercial Kitchen Space</p> <ul style="list-style-type: none"> • 2,200 community kitchen for classes. • X,000 SF of production kitchen space
	

⁹ USDA. 2012. Regional Food Hub Resource Guide: Food hub impacts on regional food systems, and the resources available to support their growth and development. United States Department of Agriculture.

Central Kitchen – Cleveland, Ohio

The Central Kitchen is a food hub, located in Cleveland, Ohio. The hub’s mission is to help businesses at a startup or scale-up stage grow into sustainable businesses. At 137,500 sq. ft., the facility has storage, production space, and a commercial kitchen.

Core Focus

Local food business development.

Commercial kitchen and classes.

Development Program

Storage

- Dry and Cold by the pallet

Co-packing: None

Processing

- Production, packaging, and logistics amenities

Kitchen:

- 3,600 sq ft.
- 6 kitchens for canning, catering, and baking
- 3 prep stations for production
- 5 production kitchens planned for 2019



The Good Acre – Falcon Heights, Minnesota

The Good Acre is a 12,000 sq. ft. local food facility. As a nonprofit, they offer support to both farmers and food makers via various programs, classes and classroom space, farm shares, and kitchen and storage space in Falcon Heights, Minnesota.

Core Focus

Connecting farmers to food service sector.

They work with caterers, businesses, and institutions.

Development Program

Storage

- Dry and Cold for rent (shelf or pallet)
- 4,700 sq. ft.

Co-packing: None

Processing:

- Vegetable wash line (wash, sort, and pack)

Kitchen:

- Space available for rent \$15/hr



Kitchen Cru – Portland, Oregon

KitchenCru is a shared use community kitchen and culinary incubator located in Portland, Oregon. With 4,800 sq. ft. of space, KitchenCru helps support culinary entrepreneurs by providing kitchen space, equipment, and referrals to professional services.

Core Focus

Supporting culinary entrepreneurs.

Commercial kitchen and professional services.

Development Program

Storage

- Onsite storage and office space
- Monthly charge for storage space

Co-packing: None

Processing: None

Kitchen:

- Access if you become a member (subject to availability)
- Hourly charge for kitchen time



Farm Fresh – Pawtucket, Rhode Island

Farm Fresh Rhode Island is a local food hub that provides a variety of services to the community and local businesses in order to increase food access and promote a strong local food system.

Core Focus

Increase availability and affordability of local foods.

Build strong local food system enterprises.

Development Program

Storage: None

Co-packing

- Available to produce value-added items for businesses using their recipe
- Private label production

Processing

- Offers value-added foods using ingredients from local farms

Kitchen:

- Job training, processing, and co-packing kitchens. None for rent.



The Hatchery – Chicago, Illinois

The Hatchery is a non-profit food and beverage incubator focused on support for local food businesses. The facility is 67,000 square feet in size and provides a variety of services aimed at growing local food businesses.

Core Focus

Emerging business incubation

Development Program

Storage:

- Dry and cold storage

Co-packing: None

Processing: None

Kitchen:

- Shared and private kitchens (56 private production-ready kitchens and 1 large shared kitchen)
- The facility also contains event and classroom spaces



Comparison of Local Food Facilities

Local Food Facility	Core Functions	Other Considerations
The Redd	Provision of event space, kitchen space, and storage space to support and connect local food providers	Provides zero-carbon distribution through in house distributor B-Line
Central Kitchen	Support and space for food servicers via classes and kitchen space, and storage space.	Also provides: This food hub also has an entrepreneur initiative that provides scholarship to minority entrepreneurs
The Good Acre	Connecting farmers to food makers: Farm shares, kitchen space, and storage	Also provides: Wholesale program that aggregates local products from more than 30 farms in the area; Classes/classrooms
KitchenCru	Provide kitchen space, equipment, and professional services to culinary entrepreneurs	Also provides: Professional services, including accounting, legal, insurance, banking, graphic design, marketing and advertising.
Farm Fresh Rhode Island	Increase food access and support a strong local food system.	Also provides: Farmers market, nutrition education, bonus bucks, wholesale program, order/delivery, and culinary job training
The Hatchery	Support food startups and communities	Also provides: Business planning services, co-working space for meetings and events, entrepreneurial opportunities, classes and training, and job support.

9. Appendix D: Project Advisory Committee

This work is guided by a Project Advisory Committee (PAC). The PAC is comprised of local food actors from across the local food ecosystem, including local food entrepreneurs/business owners, hunger relief organizations, public agencies, distributors, and others.

Name	Title and Organization	Type of Organization
Michael Lufkin	Local Food Economy Manager, King County Department of Natural Resources and Parks	Government
Hugo Garcia	Economic Development Program Manager, King County Department of Local Services	Government
Karen May	Project Manager, King County Solid Waste Division	Government
Mary Embleton	Regional Food System Program, King Conservation District	Government
Joe Meyer	Economic Development Manager, Port of Seattle	Government
Jennifer Tam	Food Business Advocate, Seattle Office of Economic Development	Government
Liz Fikejs	Senior Waste Prevention Program Manager, Seattle Public Utilities	Government
Gloria Hatcher-Mays	Executive Director, Rainier Valley Food Bank	NGO – Food Bank
David Bobanick	Executive Director, Harvest Against Hunger	NGO – Food Bank
Leigh Newman-Bell	Farm Development Coordinator, Pike Place Market	NGO – Farmers Market
Jennifer Antos	Executive Director, Neighborhood Farmers Market Alliance	NGO - Farmers Market
Bonnie Chiffelle	Incubation Coordinator, Ventures	NGO – Food Business Incubation
Logan Niles	Founder Pot Pie Factory	Food entrepreneur
Chris Coburn	Owner, Rainier Food Works and Seattle Pickle Company	Food entrepreneur and processor
Elizabeth Pontefract	VP of Strategy PCC Markets	Coop, grocer
Austin Becker	Director, Farmstand Local Food	Micro-distributor
Toby Rittner	President & CEO Council of Development Finance Agencies	National association dedicated to the advancement of development finance
Allison Rowland	Coordinator, Research & Technical Assistance Council of Development Finance Agencies	National association dedicated to the advancement of development finance