



## Aggregating, Distributing, and Marketing Local Foods in San Mateo County, California

### *Analysis and Recommendations for Enhancing a Local Food Economy*

**Report for:**  
**San Mateo County Food System Alliance**  
**Report by:**  
**Community Alliance with Family Farmers**



**Photo Sources: Source: San Mateo County Newsroom; Wikimedia Commons**

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## Acknowledgements

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## Executive Summary

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This report contains the results of a broad-spectrum inquiry to discover opportunities that support a thriving, locally-based food system in San Mateo County, California. Research was conducted during 2013 to identify feasible market-based strategies that could enable economically viable livelihoods for food producers and increase accessibility for consumers wishing to purchase locally produced food. The following report highlights the challenges of local food production, distribution, marketing, and purchasing, revealing insights into the range of complexities in a local food system.

Focusing on San Mateo County's land-based agriculture, livestock, and fishing industries, this study explored opportunities and constraints for three priority areas: 1) establishing new institutional markets for producers, 2) increasing access to local food for all San Mateo County communities, and 3) enhancing recognition and adoption of San Mateo County's "As Fresh As It Gets" brand. Several recommendations are provided to address these priority areas, but the main outcome from this report is the realization that coordinated and collaborative efforts are key to sustaining the County's food system.

For this study, the San Mateo County Food System Alliance (Alliance) contracted the Community Alliance with Family Farmers (CAFF) to conduct the investigation and analysis. CAFF used information gathered from publicly available data sources as well as primary-source surveys and interviews with food system stakeholders (including food producers, distributors and consumers). Research efforts focused on identifying and analyzing current supply and demand, as well as new market opportunities, for San Mateo County produce, livestock and fish products.

The key findings of this study include the following:

### *Characteristics*

- San Mateo County has a small available land area for agriculture, but high-value production and proximity to direct and wholesale markets and urban centers.
- The agriculture industry (including livestock production) is in decline, with a notable drop in the nursery and horticultural segment.
- A decline in the wetfish and finfish industry is offset by a sizable increase in the crab industry.
- Based on production value, produce grown in the county is dominated by five main commodity crops: Brussels sprouts, leeks, peas, fava beans and pumpkins.

### *Challenges*

- Fishermen in San Mateo County are unable to set market prices for their product (they are price takers).
- Food service buyers cited seasonality, cost, unreliable delivery, and lack of food safety plans as the main challenges of sourcing local products.
- Food service operators do not typically purchase the primary vegetables that are grown in the County (e.g. Brussels sprouts, leeks, fava beans etc.).
- Very few wholesalers at the Golden Gate Produce Terminal Market purchase from San Mateo County farmers citing problems with dependability, consistency and price. Those who do buy from local farmers typically buy Brussels sprouts and leeks from the larger producers.

- Distributors report that the major problem in purchasing directly from San Mateo County growers is the out-of-the-way location of the farms.

#### *Opportunities*

- Many producers expressed interest in production planning and contract growing.
- Transportation to markets is noted as expensive and time consuming, but a small percentage of producers surveyed share a delivery system with other growers or used third-party options.
- Direct marketing is the most popular outlet for producers surveyed, however very few sell directly to schools or institutions.
- Most producers surveyed think it is important for their products to go to San Mateo County buyers.
- “As Fresh As It Gets” is not well utilized, as few producers are using the label in their marketing.
- Ranchers are not currently included in the “As Fresh As It Gets” campaign, even though they carry out direct sales.
- The County Ag Department recently received \$40K per year for two years to re-engage the “As Fresh As It Gets” program.

Considering these findings, the research team recommends the following strategies that can lead the county toward improved market saturation of San Mateo County grown and harvested products.

1. **Increase Coordination: Enable production, sales and distribution models that connect players to collaborative opportunities, especially producer-buyer coordination and shared distribution.**
2. **Elevate Local Branding: Expand opportunities for all food and agriculture producers to access local branding initiatives and direct market channels.**
3. **Enhance Production: Increase diversity of vegetable and fruit production, especially by supporting the transition of horticulture operations to produce.**
4. **Support Independently Operated Service Facilities: Enable commercial operations that offset transactional costs of aggregating and brokering local food.**

Above all, ensuring a viable food system economy in San Mateo County requires supporting entrepreneurial efforts to engage producers and consumers with local selling and purchasing options. Recommendations such as the independent service facilities rely on a business-minded operator to find the “sweet spot” of local food pricing, pair with appropriate markets, and coordinate relationships between various entities.

This report acknowledges that there is no single solution to address the challenges of local food distribution and access. Food systems change requires multiple levers to be pulled by multiple players. Working with a diversity of entities to build upon existing infrastructure will create a stronger, more inclusive regional food system, one that supports all players – from producers and laborers, to distributors and aggregators, to individuals and institutions.