



# Puget Sound Food Infrastructure Exploration

**What infrastructure could help catalyze the development  
of an environmentally restorative, economically viable,  
and socially just and equitable regional food system?**

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Ecotrust is powered by the vision of a world where people and nature thrive together. Since 1991, we have partnered with local communities from California to Alaska to build new ways of living and doing business and to implement radical, practical ideas for cultivating a food system that is equitable, regenerative, and delicious. From forestry to finance, food access to green building, we work to advance social equity, economic opportunity, and environmental well-being. Together, we are making this place we live a home that we love. Follow us @ecotrust and learn more at [ecotrust.org](http://ecotrust.org)



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Prepared by Ecotrust for Sustainable Communities Funders  
and the Bullitt Foundation

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# Executive Summary

## 1.1 Purpose

Our food system is built upon and exacerbates some of the most pressing issues of our time, from climate change to social inequity and beyond. If we are intentional with our approaches, however, redeveloping our food system could provide a tremendous opportunity to advance a shared vision that protects our environment, mitigates climate change, and advances social and racial equity.

In 2018, the Bullitt Foundation and the members of Sustainable Communities Funders supported an exploratory project to understand the landscape of infrastructure needs to support a more equitable, restorative, and prosperous food system in the Puget Sound. The objectives of the *Puget Sound Food Infrastructure Exploration* were: to assess and clarify the need for local food system infrastructure in the Puget Sound region, facilitate a collaborative review that aligns with existing civic programs, provide clear focus on equity and food access, and identify specific opportunities that could warrant further research.

In addition, this exploration consolidates a wide variety of information related to food system infrastructure in the Puget Sound, including past research and current projects, to help a wide variety of stakeholders engage in ongoing and new project development. And finally, because it is a core value of both Ecotrust's and the Sustainable Communities Funders' to center racial equity, this exploration also attempts to highlight where people of color and/or community-based organizations were explicitly engaged, or not, in order to prompt further discussion of whether all relevant perspectives are adequately engaged in the formulation of next steps.

## 1.2 Methodology

The exploration included three phases: 1) primary research with food system actors (producers, buyers, community-based organizations, and other stakeholders) from Skagit, Snohomish, King and Pierce Counties, 2) secondary research to review and summarize past regional food infrastructure reports, and 3) direct contributions by community-based organizations regarding food infrastructure needs.

## 1.3 Conclusions & Recommendations

### 1.3.1 “The What”

Local food infrastructure needs have been discovered in this exploration to be fragmented across scales, product categories, target constituents, and local geographies. What seems to be universal is the need for hard-asset infrastructure (e.g. warehousing, frozen storage, licensed kitchens), paired with training or technical assistance, to connect small and mid-sized producers with local food buyers, be they individuals or institutions. Investment and support is needed all along the value chain to bring into being an equitable

and restorative food system: one that stewards land and water resources effectively and provides affordable access to all eaters. Specifically, infrastructure is needed in several key categories:

- **Land access and on-farm infrastructure, plus farm business incubation and training.** The prohibitive cost of land in the Puget Sound was noted in almost every interview and study. Creative solutions continue to be needed for agricultural land preservation and land access for new and beginning farmers and ranchers, especially immigrants and people of color who have suffered systemic barriers to land ownership and financing over generations. Beyond basic on-farm infrastructure such as post-harvest handling facilities, animal handling facilities, cold/frozen storage, tools, equipment and farm implements, new producers may need investment, grants or loans to support start-up operations and access to technical assistance in production, business management training, market development, and value chain coordination. For immigrant populations and aspiring producers of color, it is also extremely important for the services provided to be culturally relevant and responsive to the systemic disparities that these communities have historically faced. Any such programming should be developed from the start in partnership with the intended beneficiaries, so as to ensure their needs are reflected within program design and implementation.
- **Aggregation, warehousing, and cold/frozen storage at multiple scales.** While most food system infrastructure is unique to its product category (wash and pack stations for produce, slaughter and processing for meat, seed-cleaning and hulling/milling for grains, etc.), many different product categories require a waystation for storage to facilitate efficient distribution of local product to buyers. Such aggregation capacity is needed at multiple scales - from relatively tiny facilities that could be housed in a shipping container and serve a geographically compact network of very small or new producers, to larger scale warehousing designed to serve a broader regional “ag of the middle” cohort, as was the mission of Ecotrust’s Redd on Salmon Street project in Portland.

Developing aggregation capacity across the scale spectrum is important for creating a pipeline of support for growth and a smooth flow of local goods through the region - very small producers will likely start out serving very small buyers in their immediate region, but some will grow and need access to larger markets. With that growth will come the need for access to additional infrastructure, as well as next-level technical assistance and training, partnerships with other producers to serve larger buyer needs, and specialized staffing. Clear opportunities exist to develop or coordinate aggregation capacity to serve each scale of operation, and to illuminate that pathway for growth and support to regional producers and entrepreneurs.

Before investing in aggregation capacity, it is important to understand that warehousing is a break-even activity at best, especially when storing whole or minimally processed food products that are very low-margin.

Unfortunately, traditional “food hubs” have at best a middling track record of financial viability, largely because of their mission-driven focus on produce, as well as their non-profit organizational structure and management style. To be financially viable, hubs need to include a mix of higher-margin value-added products (such as meat and locally produced consumer packaged goods and beverages), be operated with business rigor, and ideally, leverage a set of corollary services (such as sales support, advertising, office rental, technical assistance, etc.) to subsidize the warehousing component. Stringent financial feasibility studies and business modeling should be done to evaluate risk and viability before supporting any discrete aggregation development project.

A final note on facility development: to maintain cold-chain custody and comply with food safety regulations, aggregation in specific temperature zones is often required, and facilities must meet zoning, permitting and other regulations within multiple jurisdictions. Frozen storage is almost always in highest demand and shortest supply, so it is smart to err on the side of over-investing in frozen storage within a given facility, when possible. Advanced technology now exists to reduce the energy usage and environmental impacts of cold storage, but sometimes at significant incremental cost to the development project, so providing funding specifically for environmental upgrades may be a useful mechanism for support.

- **Distribution infrastructure, potentially to include sales support.** Most small producers start out self-distributing their product, whether by selling at farmers’ markets or farm stands, delivering product to CSA drop sites, or by delivering product themselves to restaurant and grocery accounts. Producers at this scale often need investment in trucks or delivery vans, which can sometimes be shared among multiple producers. Self-delivery is an important step in early-stage growth, as it is often while making deliveries that producers connect with their buyers in person, discover important nuances to their customers’ businesses, and learn how their products are received and merchandised. As producers grow, spending time behind the wheel making deliveries becomes less valuable, and the opportunity cost of time not spent further developing their products or business increases. At this stage it is useful to plug into an established distribution service, especially if the service also offers support for sales and market development, like providing samples and sales collateral, or staffing tastings.

Large distributors like Charlie’s Produce, Duck Delivery, and Food Services of America offer all of those services, but at high cost to the producer, and often with minimum volume requirements that are at a scale still out of reach for even midsized regional producers. “Aggregators of the middle”, like Puget Sound Food Hub and Farmstand Local Foods, offer accessible distribution services for small and midsized producers, including some sales support, and can potentially help overcome the significant barriers to

getting local food into institutions like schools and hospitals. We believe such aggregators could become integral components of a robust Puget Sound food system as they grow, and therefore are worthy of further investment and support.

- **Licensed kitchens for value-added processing.** As noted in studies by the Port of Seattle and the Food Innovation Network (FIN), the Puget Sound region lacks adequate facilities to support entrepreneurship in catering and specialty food business development. As with the other components of infrastructure described above, technical assistance and incubator services in both business management and language/cultural agility are vital to the success of any hard asset infrastructure development. FIN's Tukwila Village Food Hall will provide some kitchen and training capacity in South King County, and our understanding is that the Port of Seattle is still considering a licensed commercial kitchen project. Additional projects may also be needed to serve specific constituents or additional geographies.

### 1.3.2 “The How”

It is vitally important to note that *how* infrastructure projects are developed is as important as *what* infrastructure is developed. Even in this review of regional research and studies focused on food infrastructure, it is clear that specific efforts were generally not made to understand the unique needs and perspectives of communities of color or others historically underrepresented in food and agriculture conversations, or to ensure inclusive leadership in the development of new projects. We at Ecotrust have been guilty in this respect as well. While food banking and the array of programs designed to increase food access are critical to getting adequate nutrition to those who can't otherwise afford or access it right now, especially children, they are not fixing the food system at a fundamental level, nor are they removing the long-term systemic barriers that help keep people in need of services. We believe regional food infrastructure has the capacity to help change the food system writ large, if attended to with that intention.

To leverage investments in food infrastructure to help build a more just and equitable food system, probably the most important factors are inclusive leadership and collaborative decision-making. Communities of color, be they tribes, tribal members, or represented by community-based organizations, must not only be invited into projects at conception, but they must be invited in numbers significant enough to have meaningful voices at the table, and to share power over decision-making in such a way that the project is genuinely a collaborative effort. This will take time. If we want our collaborations to be successful, dominant culture organizations, including Ecotrust, also have an obligation to do significant internal work to recognize the ways in which our approaches are not “universal”, but rather reflect specific attributes of white culture. And finally, given the historic and current systemic barriers facing communities of color, infrastructure projects should include a specific objective related to capacity-building among participating community-based organizations in order to be most helpful in the long-term.

With regard to next steps, given the wide variety of opportunities that exist to further develop the Puget Sound regional food system, individuals and organizations interested in food infrastructure development should clarify the specific geography, scale of operation, beneficiaries, and desired impacts that align with their mission or motivations. Such clarity will provide useful transparency and self-awareness when engaging directly with the communities who will ultimately co-create and benefit from the projects. As projects and partners are confirmed, the challenging and often slower-moving work of humble collaboration and trusting partnership development take center stage. It would be helpful to all food system actors from around the region if transparency were provided on projects, project partners, and sources of funds, which suggests that it may also be helpful to create a mechanism for or identify a coordinator who can help facilitate communication and co-development of different projects.

### **1.3.3 Opportunities**

One idea for infrastructure coordination and two specific opportunities are described in the conclusion to this report as worthy of further consideration and potentially for collaborative regional support: Coordinating a Mesh-Network of Local Food Infrastructure, Community-Led Food Aggregation in South King County, and Building an Urban Last Mile Logistics Hub in SODO.

The first idea simply reflects the recognition that the most effective approach to addressing the varied infrastructure needs may be a coordinated effort (perhaps loosely coordinated) to support a constellation of projects designed to ultimately flesh out a mesh network of scale-appropriate food infrastructure to connect small and mid-sized producers with local buyers across the region.

Because of the inherent regional nature of food production and distribution, ideally such a coordinating function wouldn't be tied to a specific county or discrete local geography. Urban and rural agriculture are both critically important in building regional food access and resilience, and both have an important role to play in stewarding natural resources and doing all we can in the Northwest to mitigate the effects of rising inequality and climate change. That said, there could be specific programs offered by particular jurisdictions (e.g. cities, counties, conservation districts, states) that could be knit together to serve the overarching vision of a robust regional food system, and creating or coordinating dedicated capacity to shepherd that vision could help take advantage of those opportunities and overcome the inevitable challenges.

The community-based organizations that contributed to this report could be valuable partners in such an effort. We encourage readers to review section 5 to recognize what are in some cases very specific needs and opportunities as defined by community-led organizations operating in the Puget Sound region. These organizations were invited to contribute based on their commitment to supporting communities of color and others who have long-faced systemic barriers to food and land access, and are actively wrestling with the power structures inherent in our current food and agriculture systems. For help finding projects and organizations that align with specific funder missions

and goals, we have created an index of objectives and key results sought by the contributing organizations that can be found in Appendix 7.4. We also recognize that there are a great many more community-based organizations worthy of support and partnership in the region, so we offer a directory of additional organizations doing food system and related work in Appendix 7.5, with apologies to the organizations we inevitably missed.

The first concrete opportunity we suggest warrants further research is co-led by a collaboration of community-based organizations serving constituents in South King County who have begun exploring their shared needs for *small scale* food infrastructure in order to support specific programming in food access, urban agriculture, and community resilience. The partners agree that a food aggregation and access facility, sized to serve their constituent farmers, as well as those who aspire to launch urban commercial farm businesses, and located in close geographic proximity to their communities, is an important next step in achieving their individual and shared goals.

Finally, our research suggests that the most relevant catalytic infrastructure to serve *large scale* food buyers, including institutions, may be a last-mile storage and logistics facility in Seattle. Such a facility would be designed to provide support for local aggregators who are gathering product from multiple farmers on the urban periphery (including in Skagit, Snohomish, and King counties) for delivery to metro area institutions and other wholesale accounts. With access to cold, frozen and ambient temperature storage, the aggregators could hold larger quantities of product – including produce, proteins and value-added products – in the urban core, thus facilitating more frequent deliveries to clients and more efficient loads in from rural areas. Such a facility could also offer value-added production space, distribution services, co-working and office space, technical assistance and incubator services.

In closing, we at Ecotrust are committed to the cultivation of equitable, restorative, prosperous and resilient regional food systems across the Pacific Northwest, and look forward to continued opportunities to engage in and partner on many of the ideas and opportunities included in this exploration in the months and years to come.

