

Executive Summary

“Eating Local” has become a phenomenon.

Local food is distinguished, not only by where it originates, but also by who produced it and how. Could the City of San Francisco feed itself with local food from farms and ranches within 100 miles of the Golden Gate? Agriculture within this “foodshed,” as it was defined for purpose of this study, produces 20 million tons of food annually, compared with annual food consumption of 935,000 tons in San Francisco and 5.9 million tons in the Bay Area as a whole. In all, more than 80 different commodities are represented, only a few of which are not produced in enough abundance to satisfy the demands of the City and Bay Area: eggs, citrus fruit, wheat, corn, pork and potatoes. Many other commodities are available only seasonally, even though northern California has a long growing season.

It is impossible, however, to determine precisely how much locally-grown food is consumed in the City, or indeed how much of what is consumed is in fact produced by local farms and ranches. The commercial food system in this region, as throughout the United States, does not track the origin of what it sells, primarily because most consumers do not yet demand to know the provenance of what they eat.

Food that is identifiable as local, including that which is organically or “sustainably” produced, is a very small fraction of both total regional agricultural production (0.5 percent) and of total U.S. retail sales (2.8 percent). This sector of the food system is growing rapidly. In the San Francisco foodshed study area, production of food for sale directly to consumers increased 9 percent a year from 1997 and 2002. National organic sales grew 18 percent annually between 1998 and 2006.

Most of what is produced in the San Francisco foodshed study area comes from the Central Valley and the Salinas Valley. Only 18 percent of the farmland in the 10 million acre foodshed study area is irrigated cropland, but it

is responsible for three-quarters of total agricultural production by dollar value. This land is increasingly threatened by urban development. Twelve percent of foodshed study area is already developed and new development is consuming farmland at the rate of an acre for every 9.7 residents. If this continues, 800,000 more acres of farmland will be lost by 2050.

Between producers and consumers is an elaborate food distribution system. It has been geared to deliver inexpensive, standardized food products, but is evolving in the direction of delivering the “story behind the food” in response to growing consumer demand. But it has a long way to go. A special challenge is assuring that low-income consumers in the City have access to healthy, local food.

There are other significant challenges that must be addressed to increase both the production of food for local consumption and local consumption of locally-grown food. The traceability of the origin of the food is fundamental. Educating consumers about eating foods that are in-season is another. Capital, know-how and infrastructure will be necessary to enable producers to transition to growing for local, in addition to global markets.

Despite the challenges, there are significant opportunities to increase “eating locally” in San Francisco and the Bay Area. The local food movement in the region has as much momentum and anywhere in the country. Many public and private institutions are now seeking to source food locally. As the fossil fuel era wanes, fresh, local food may gain an advantage in the marketplace over food that is processed and shipped long distances. And, finally, there is the land. No place in the United States, and perhaps the world, is as blessed as San Francisco by the amazing cornucopia produced on farmland within only 100 miles of the Golden Gate.