



September 28, 2023

The Honorable Phil Mendelson
Chairman
Council of the District of Columbia
John A. Wilson Building
1350 Pennsylvania Avenue, N.W., Suite 504
Washington, D.C. 20004

Dear Chairman Mendelson:

I am pleased to submit to the Council of the District of Columbia the 2022 Assessment of the Food System in the District of Columbia Report, prepared by the Food Policy Council and Office of Planning pursuant to Section 3(c) of the Food Policy Council and Director Establishment Act of 2014, effective March 10, 2015 (D.C. Law 20-191; D.C. Official Code § 48-312(c)). The report includes information on the state of the local food economy and food access across the District.

If you have any questions regarding this report, please contact Caroline Howe, Food Policy Director at 202-442-7604, or caroline.howe@dc.gov.

Sincerely,

A handwritten signature in black ink, appearing to read "Muriel Bowser".

Muriel Bowser
Mayor

2022 Assessment of the Food System in the District of Columbia



Summer 2023

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An Update From Mayor Bowser



We all play a role in the District's food system and share the responsibility of supporting and growing that system so it can flourish. In 2021, the District's food system was strained by numerous challenges that lingered from the global pandemic. The burden of struggling to keep food on the table is still too high and is disproportionately carried by communities of color, households with children, and older adults.

Making our food system more accessible, equitable, and sustainable has been a top priority since the start of my Administration. The Food Access Fund continues to support the development of grocery stores and sit-down restaurants in Wards 7 and 8, and the Nourish DC Fund, which is focused on expanding small business owner's opportunities to create jobs and generate wealth, has supported over 100 businesses. In addition, our Urban Agriculture office continues to expand the footprint of community gardens and urban farms, and to increase investments in farming infrastructure. These investments represent our ongoing commitment to better the lives of all District residents.

Though our food system is strong, rebounding, and growing, there is still significant work to be done to ensure that all residents have access to the healthy, affordable food they need to thrive, and that local food businesses, entrepreneurs, and urban farms have the opportunities they need to succeed. I am proud of the leadership of the Food Policy Council in engaging with residents, businesses, and organizations to ensure their voices are heard as we advance food policies and programs. Together, we will continue to build a stronger, more equitable, resilient, and sustainable food system for all.

Sincerely,

A handwritten signature in black ink that reads 'Muriel Bowser'.

Muriel Bowser
Mayor, Washington, DC

Acronyms

This report refers to many District and federal agencies and programs; below are the full names and their acronyms.

CACFP: Child and Adult Care Food Program

DC Health: Department of Health

DHS: Department of Human Services

DMPED: Office of the Deputy Mayor for Planning and Economic Development

DOEE: Department of Energy and Environment

DPR: Department of Parks and Recreation

DSLBD: Department of Small and Local Business Development

NSLP: National School Lunch Program

OP: Office of Planning

OSSE: Office of the State Superintendent of Education

P-EBT: Pandemic Electronic Benefit Transfer

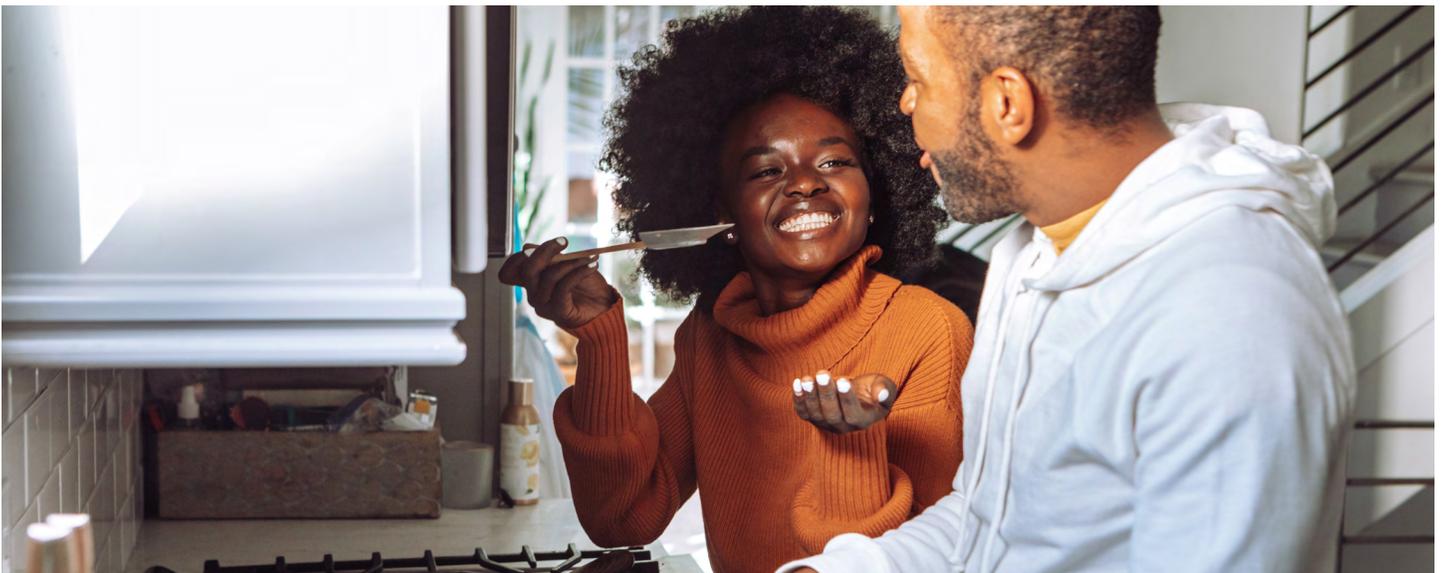
SNAP: Supplemental Nutrition Assistance Program (formerly known as Food Stamps)

SBP: National School Breakfast Program

SSO: Seamless Summer Option

USDA: United States Department of Agriculture

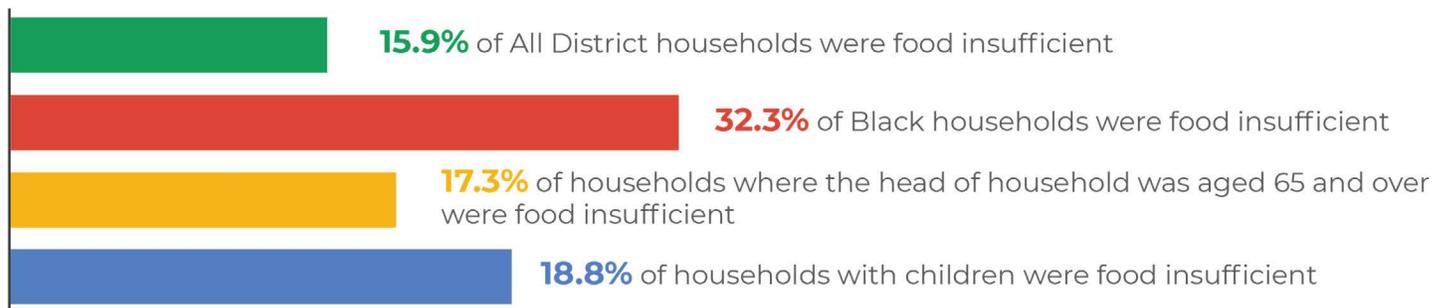
WIC: Special Supplemental Nutrition Program for Women, Infants, and Children



Summary of Findings

The USDA reported that the 2021 Food Insecurity Rate for the District of Columbia was 9.0%.

FOOD INSUFFICIENCY RATES FOR HOUSEHOLDS - DECEMBER 2021



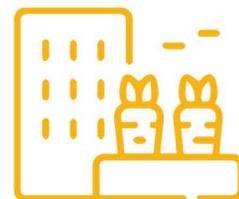
FOOD ACCESS

- **68** Full-Service Grocery Stores
- **4** Full-Service Grocery Stores East of the Anacostia River
- **40** of the 50 Healthy Corner Stores are located in Wards 5, 7, or 8
- **29** Healthy Corner Stores accept SNAP
- **9** Healthy Corner Stores accept WIC
- **50** Farmers Markets



URBAN AGRICULTURE

- 45.6 acres are dedicated to urban farms and gardens
- 214 Gardens/Farms including:
 - **107** School Gardens
 - **70** Community Gardens
 - **25** Urban Farms



NUTRITION PROGRAMS (PARTICIPATION)

SNAP

- Average of 25% of District residents received SNAP monthly in 2021
- 13% of SNAP benefits were spent online at the end of 2021
- 94.5% of SNAP clients who reported race identify as Black/African American

WIC

- In 2021, DC Health issued \$6,301,992 in WIC benefits to 14,425 individuals

P-EBT

- In 2021, DHS issued \$125,292,679 in P-EBT benefits to over 79,000 children

MEALS FOR CHILDREN

- DC provided 8,893,899 free meals to children during and after school



REDUCING WASTE

- **38** DPR compost cooperative sites
- **10** Farmers market food waste drop-off sites



FOOD BUSINESSES & WORKFORCE

- **34,430** Food sector jobs
- **\$46,012** is the median wage for food sector workers compared to \$98,370 is the median wage for all DC Workers
- **381** Streateries have been permitted in the District

Introduction

Residents of the District of Columbia have experienced significant shifts in DC's food system since the last DC Food System Assessment was published in 2018. The COVID-19 public health emergency, challenges within the food supply chain, changes in federal nutrition programs, fluctuations in employment rates, and high inflation have all affected the District's local food economy and residents' ability to access nutritious food. At the same time, the District has made historic investments in nutrition assistance, food access, and local food businesses. This report highlights key data that measure the health of the District's food system in 2021 and the first quarter of 2022, and shows trends since 2018. It draws a picture of how District residents and neighborhoods are experiencing and navigating our interconnected food system.



Definitions

Food Insecurity means a lack of consistent access to enough food for an active, healthy life. This data comes from the U.S. Department of Agriculture.

Food Insufficiency means when a household reports that they did not have enough to eat sometimes or often in the last seven days. This data comes from the U.S. Census Bureau Household Pulse Survey. Food insufficiency is likely a more conservative measurement than food insecurity since it does not include households who indicate that, although they had enough to eat, it may not have been the types or quality of food that they wanted to eat for cultural or health reasons.

Hunger is an individual level physiological condition that may result from food insecurity.¹ This term is often used to convey the severity and physical impacts of sustained food insecurity.

Nutrition Security means consistent access, availability, and affordability of foods and beverages that promote well-being, prevent disease, and, if needed, treat disease, particularly among racial/ethnic minority, lower income, and rural and remote populations including Tribal communities and Insular areas. This definition comes from the U.S. Department of Agriculture.

Key Takeaways

- The District's food insecurity rate dropped from 11.2% in 2017 to 9.0% in 2021.^{2,3} This generalized data conceals disproportionately high rates among Black and Latino/a households, households with children, and seniors.
- 25% of District residents received SNAP benefits in 2021.
- The District committed over \$25 million in 2021 to reduce disparities and increase sustainability and resiliency in the food system.
- Mayor Bowser continues to lead the international community in food systems policy by expanding sustainability initiatives to reduce the District's impact on climate change and create a greener city.
- Food sector workers take home less than 50% of the median income of all District residents and continue to face barriers to upward economic mobility.⁴
- Commercial kitchen and cold and dry storage space remain a central need for food businesses and entrepreneurs.

Areas for Future Action

- Increase access to affordable commercial kitchen and storage space for food businesses and entrepreneurs.
- Ensure that every District resident benefits from all federal and locally funded programs for which they qualify, with a focus on Black, Latino/a, seniors, and households with children.
- Expand access to fresh, affordable and culturally appropriate food for residents across the District.
- Expand urban agriculture in the District to increase local food production and nutrition education, with a focus on supporting socially disadvantaged farmers.
- Center resident voices and input in the development, evaluation, and maintenance of food policies and programs.



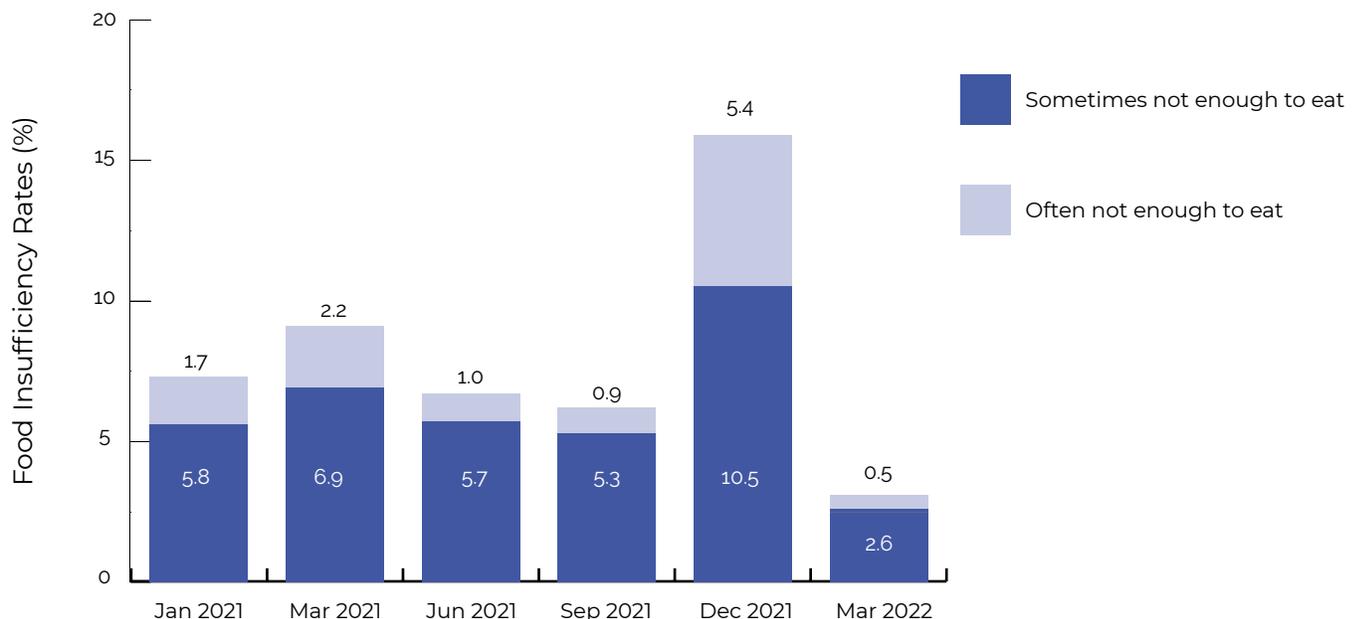
Food Insecurity and Insufficiency



People who experience food insecurity, or a lack of consistent access to enough food for an active, healthy life, feel its impacts in a variety of ways. Not only do individuals in food-insecure households experience higher rates of chronic diseases, but often-times face difficulties concentrating at work or in school.⁵ These effects can compound and result in an overall lower quality of life. For 2021, the United States Department of Agriculture (USDA) reports that 9.0% of District residents were food insecure, down from 10.6% in 2020.³ 17% of children experienced food insecurity in 2021, according to estimates from Feeding America.

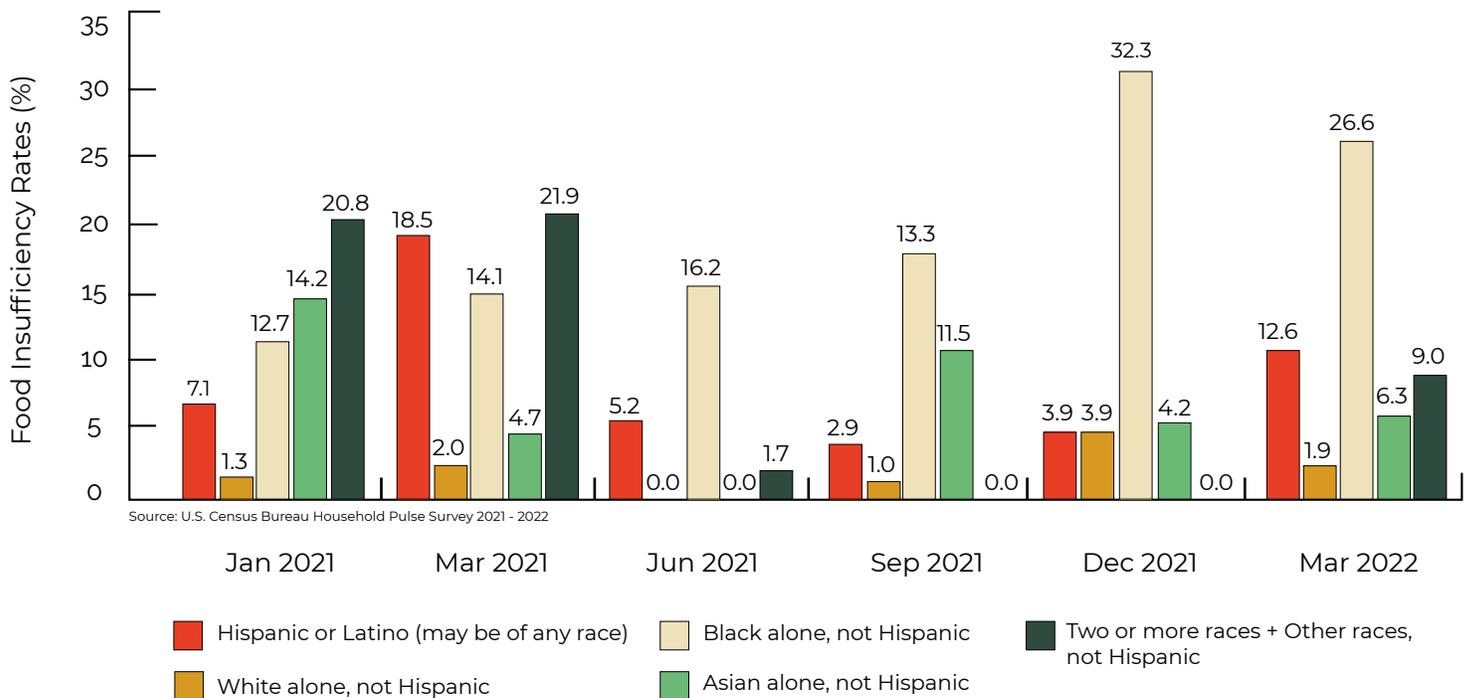
The U.S. Census Bureau conducts Household Pulse surveys to track food insufficiency, or a lack of enough food to eat over the past seven days. In the District, food insufficiency rates are trending down, from 7.5% of households in January 2021 to 3.1% in March 2022.⁷ However, food insufficiency rates in December 2021 jumped to 15.9%, potentially indicating seasonal stressors on households.

Changes in Food Insufficiency for Households, 2021 - 2022



Source: U.S. Census Bureau Household Pulse Survey 2021 - 2022

Food Insufficiency for Households by Race, 2021 - 2022



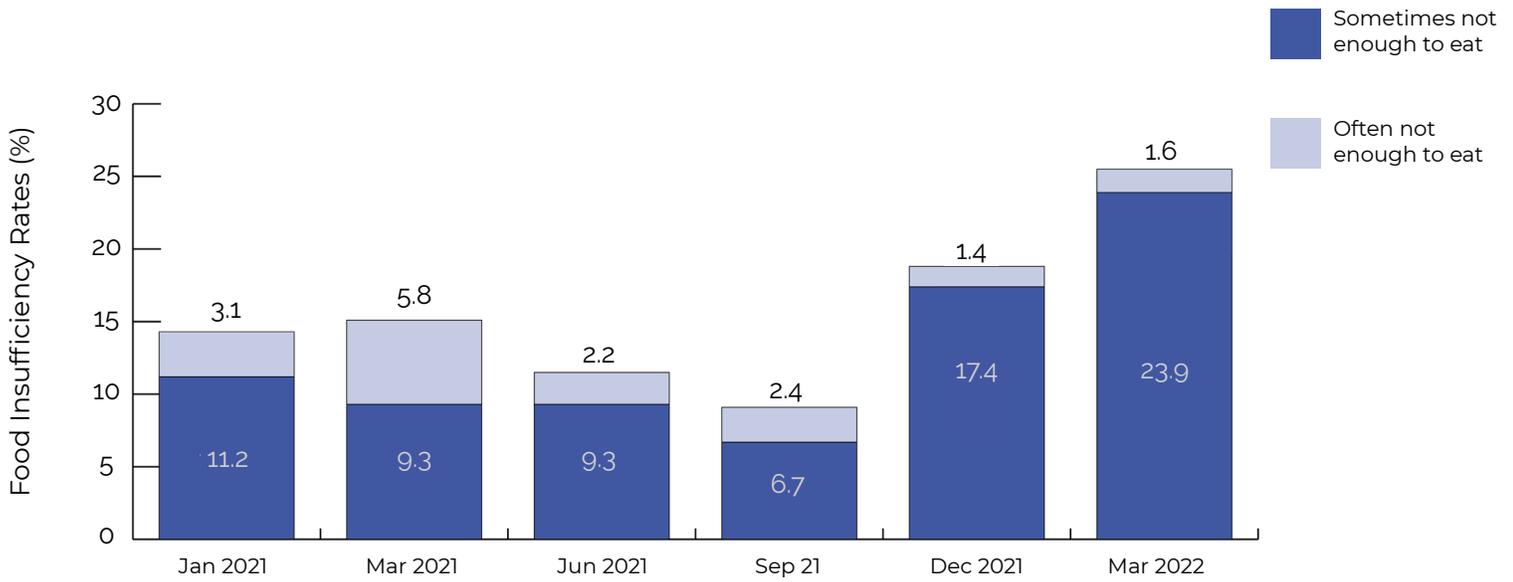
Food Insufficiency for All Households

Food insufficiency rates vary greatly based on household composition and across racial and ethnic groups. Black and Hispanic or Latino households in the District are significantly more likely to experience food insufficiency than white households. Black household food insufficiency rates more than doubled from 12.7% in January 2021 to 26.6% in March 2022. During the same period, Hispanic or Latino household rates increased from 7.1% to 12.6%. Multiracial households also appear to have experienced high rates of food insufficiency but have trended downward to be in-line with District averages. Asian and white households

had the lowest food insufficiency rates, at 6.3% and 1.9% respectively.⁸ The racial wealth gap, disproportionate unemployment rates, and systemic racism significantly contribute to these disparities.

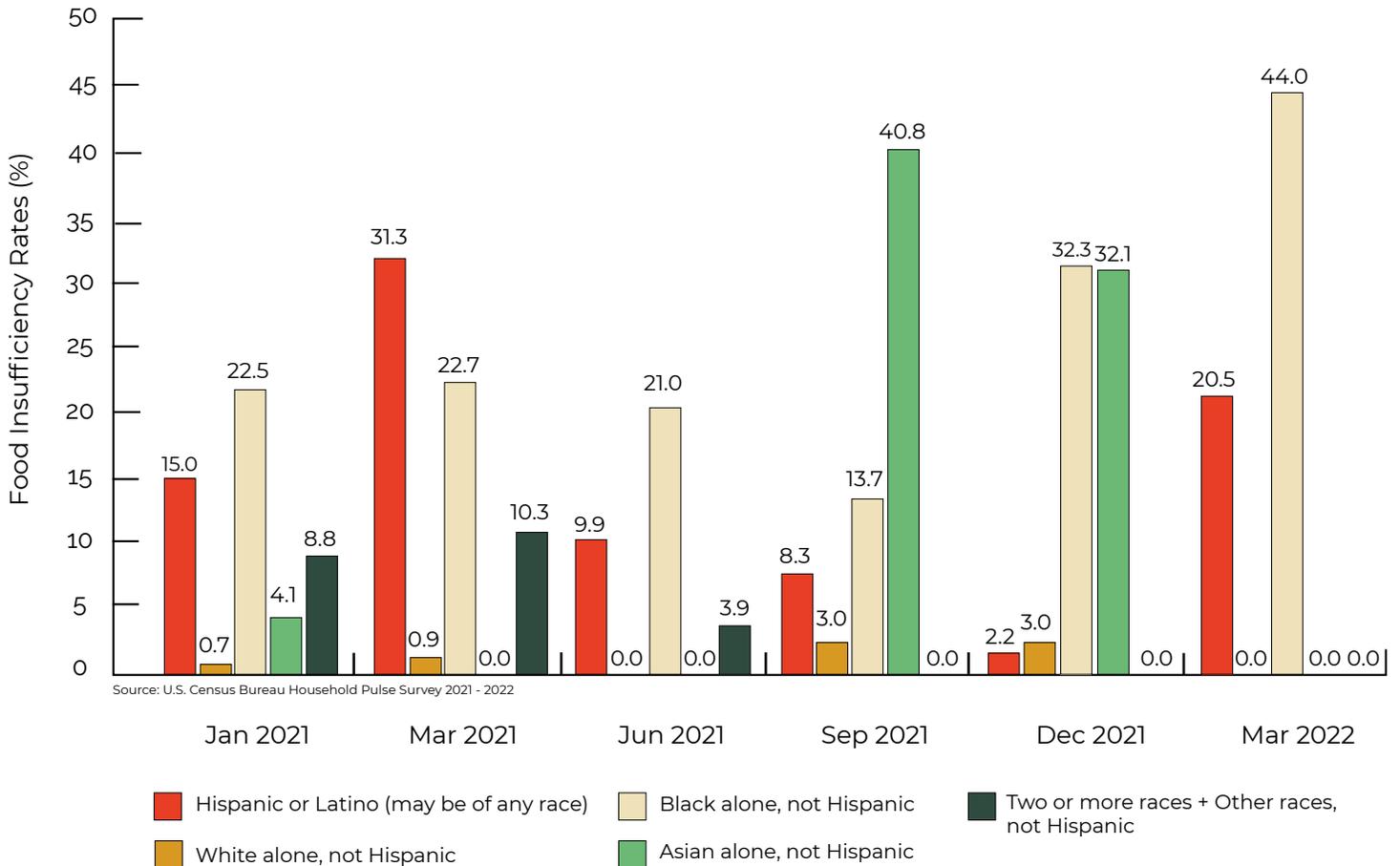
It is important to note that the data collection for Asian households and households including two or more races/other races come from a significantly smaller number of respondents. Therefore, it is difficult to draw conclusions from the data for those populations. We have reported the information here for transparency.

Changes in Food Insecurity for Households with Children, 2021 - 2022



Source: U.S. Census Bureau Household Pulse Survey 2021 - 2022

Food Insecurity for Households with Children by Race, 2021 - 2022



Source: U.S. Census Bureau Household Pulse Survey 2021 - 2022

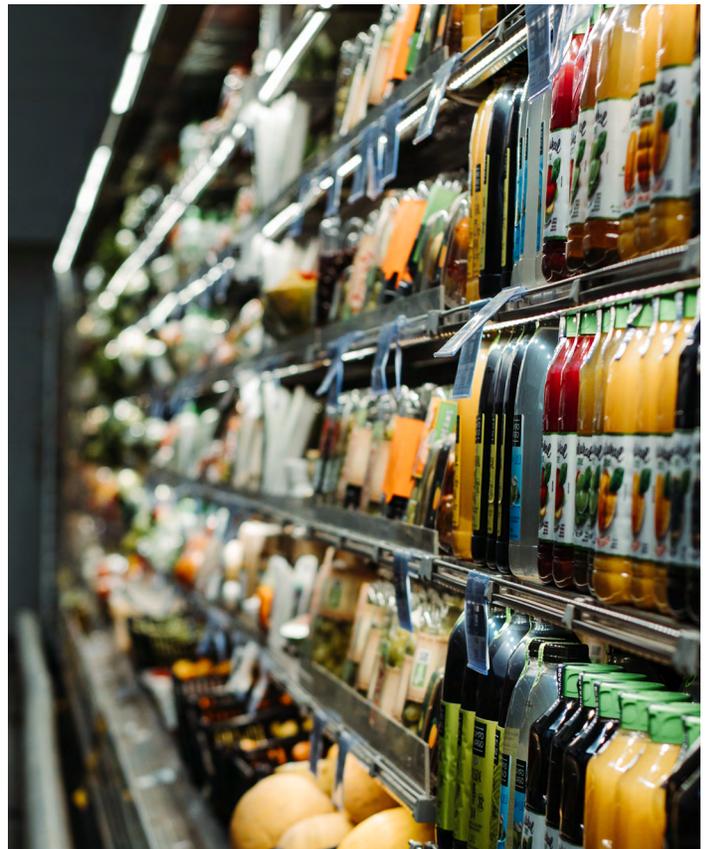
Food Insecurity for Households with Children

Black and Hispanic or Latino households with children are more likely to experience food insufficiency than white households with children. 44% of Black households with children and 20.5% of Hispanic or Latino households with children experienced food insufficiency in March 2022, compared to statistically no food insufficiency among white households with children.⁸ The Household Pulse Survey data reflects a very small number of Asian and multiracial households, so we cannot draw conclusions from these data. These disparities highlight the inequitable recovery that District residents have experienced after the COVID-19 public health emergency.



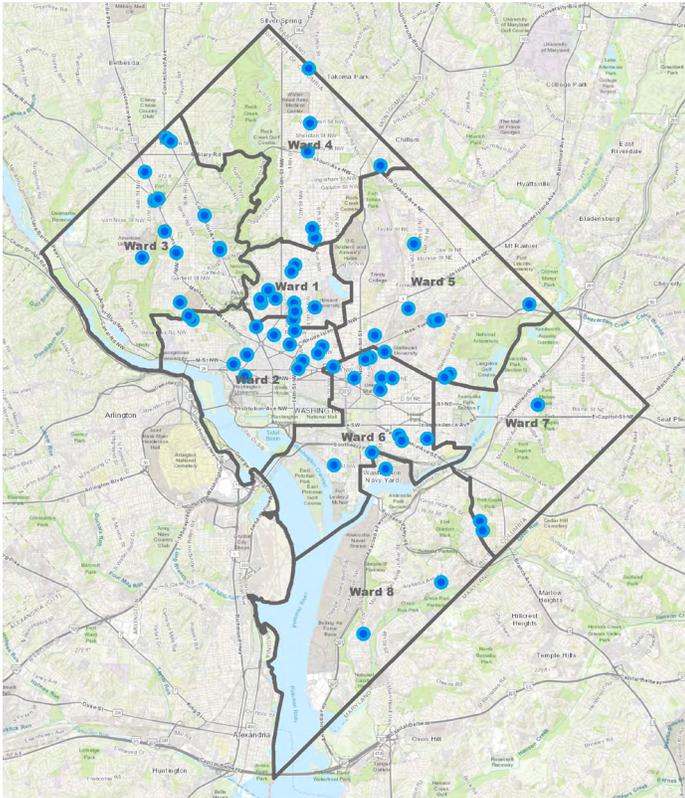
Nutrition Insecurity

Just as Black, Indigenous, and People of Color (BIPOC) residents experience higher rates of food insecurity, they also experience higher rates of nutrition insecurity. By increasing healthy food access and availability, the District is increasing nutrition security for residents and reducing the burden of diet related chronic disease. While nutrition security is not currently measured, the District does monitor rates of diabetes, cardiovascular disease, and healthcare access for residents. For more information see [DC Health's Behavioral Risk Factor Surveillance System Annual Report](#).



Food Access

2022 Grocery Store Locations

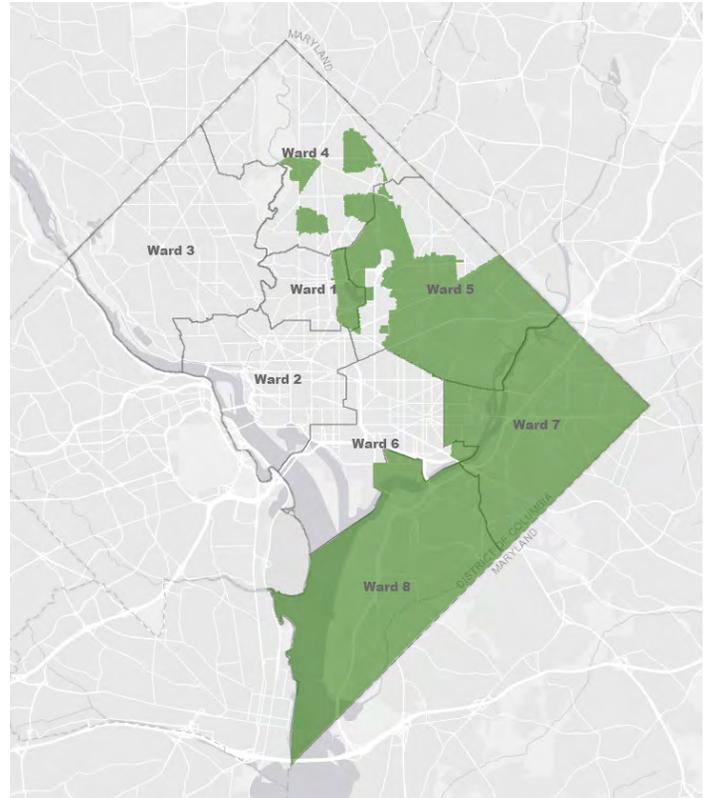


Mayor Bowser’s administration has prioritized equitable access to fresh, healthy food for residents. Although the District has [68 full-service grocery stores](#), low-income and majority BIPOC communities are more likely to live in areas lacking groceries and fresh food.⁸ While Ward 6 has 11 grocery stores, or one for every 9,200 residents, there are just four full-service grocery stores for the over 150,000 residents living East of the River.

There has been progress, with Lidl, a large full-service grocery store, opening in Ward 7 in 2022. Good Food Markets, a small format, locally-owned grocery store also opened on South Capitol Street in Ward 8 in 2021. However, the small format store closed in late 2022, citing financial challenges related to inflationary pressures and pricing challenges.

In 2021, Mayor Bowser invested federal funding from the American Rescue Plan Act to establish two new funds in 2021 focused on addressing food access and building community wealth in areas that have

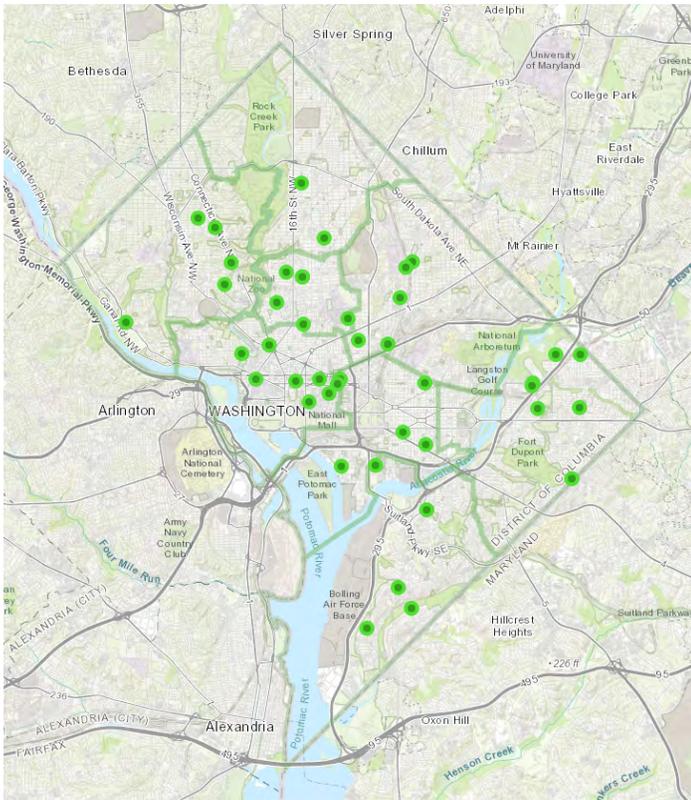
2022 Food Access Fund Priority Areas



experienced historical disinvestment and lack grocery options. [The Food Access Fund](#), administered by the Office of the Deputy Mayor for Planning and Economic Development (DMPED), provides \$54 million in grants to increase equitable access to fresh, healthy, and affordable food by securing grocery stores and restaurants in areas with low food access in Wards 7 and 8. So far, DMPED has awarded \$15.6 million to local food businesses.



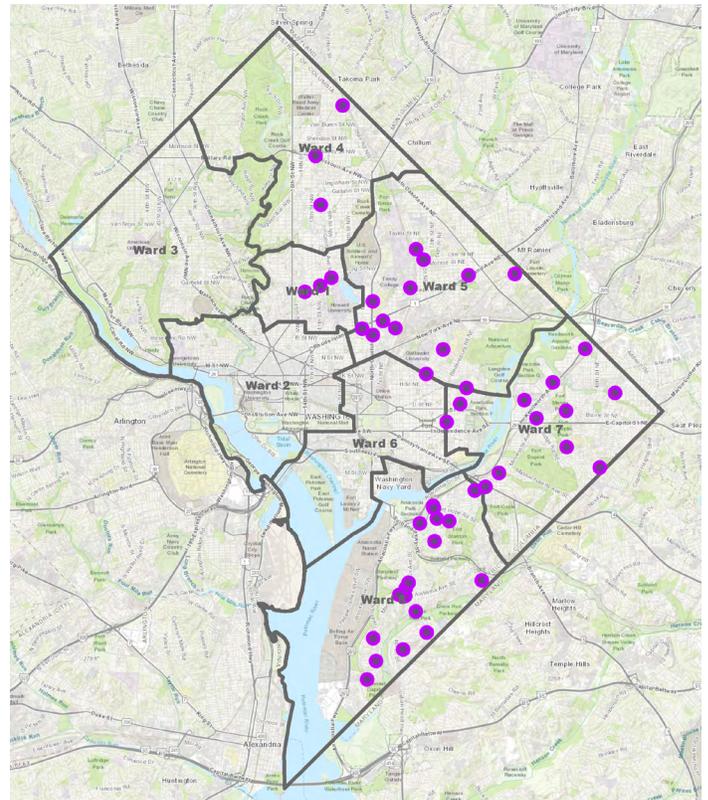
2022 Farmers Market Locations



[The Nourish DC Collaborative](#), under the leadership of DMPED, provides loans, technical assistance, and grants to small, locally-owned food businesses in the District, with a preference for businesses located in or owned by residents of underserved neighborhoods. Nourish DC supports the entire food value chain and a wide range of food businesses, including grocery stores, restaurants, caterers, corner stores, [farmers markets](#), and urban farms. The city has partnered with local Community Development Financial Institutions to administer the program. In its first year, Nourish DC provided \$533,000 in grants to 10 local food businesses in Wards 5, 7, and 8; \$14.5 million in loans; and direct technical assistance to 125 local food businesses.⁹

In addition to these funds, the District provides **supermarket tax credits** to grocery stores opening in areas that lack access to groceries and fresh food.¹⁰

2022 Healthy Corners Stores



In 2022, the District began guaranteeing a Class A liquor license to grocery stores that open in Wards 7 or 8 and operate for at least 6 months. This will serve as a powerful incentive to attract more grocery stores.¹¹ [Healthy Corners Stores](#), funded by the Department of Health (DC Health) through a grant to DC Central Kitchen, are another important tool to expand food access while supporting local businesses. The Healthy Corner Store Program delivers fresh produce and provides food storage, display, and equipment to 50 small independent stores in the District, predominantly in Wards 5, 7, and 8. The program won a competitive federal grant from the USDA Gus Schumacher Nutrition Incentive Program to create “\$5 for \$5,” which provides an extra \$5 for every \$5 of Supplemental Nutrition Assistance Program (SNAP) benefits spent. In FY 2021, the program had a 93.8% coupon redemption rate, distributing over \$208,000 of matched funds to SNAP customers.¹²

Nutrition Assistance Programs

Federal and District funded nutrition assistance programs play a critical role in supporting residents' food needs. The District administers several federal nutrition assistance programs, including SNAP, the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC), the National School Lunch Program (NSLP), the School Breakfast Program (SBP), the Child and Adult Care Food Program (CACFP), the Commodity Supplemental Food Program (CSFP), and others. DC Health also administers several locally funded nutrition assistance programs, including Joyful Food Markets (operated by Martha's Table), Produce Plus (operated by FRESHFARM), Home-Delivered Meals (operated by Food and Friends), and Grocery Plus (operated by the Capital Area Food Bank). Combined, these programs touch the lives of hundreds of thousands of residents daily and play a critical role in their food and nutrition security.



Photo courtesy of DC Office of Planning

SNAP

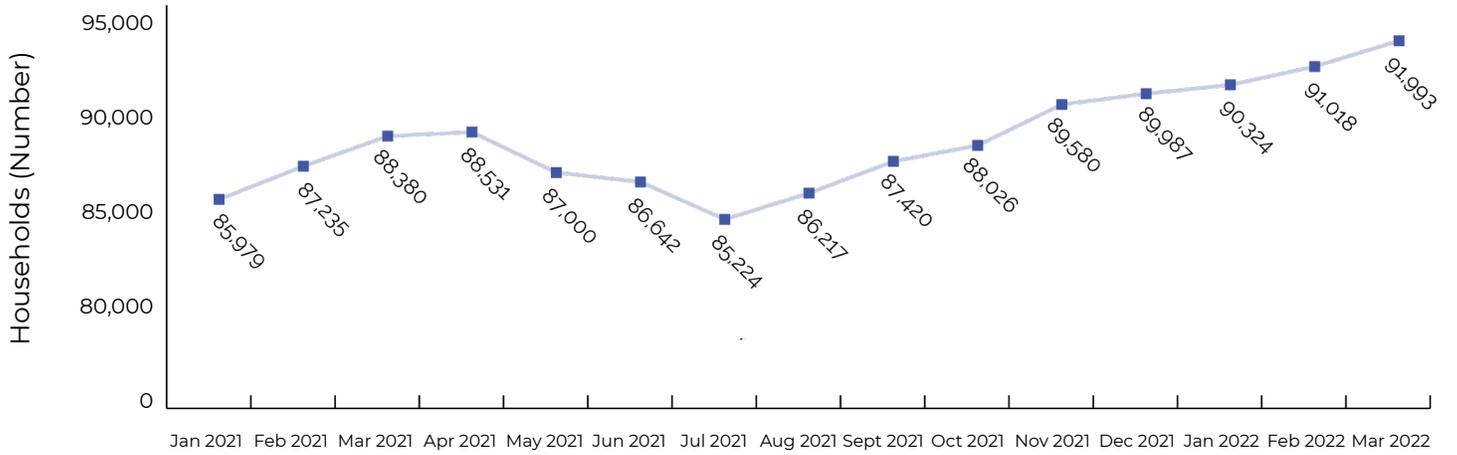
SNAP participation in the District increased from January 2021 to March 2022. During this time, the Department of Human Services (DHS) enrolled nearly 6,000 new households and increased disbursements from approximately \$31 million to \$39 million.¹³ To further support households receiving SNAP benefits, the Emergency Allotment (EA) program authorized by the USDA during the public health emergency provided an additional minimum benefit of \$95 per household.

In February 2020, before the public health emergency, approximately 64,000 District households were enrolled in SNAP. By March 2022, almost 92,000 households were participating in SNAP, a nearly 44% increase. Increased enrollment demonstrates that residents continue to experience elevated need for food assistance since the start of the pandemic. Most SNAP customers who self-identified race identify as Black/African American (94%), compared to 3% identifying as white, mirroring the disproportionate risk of food insecurity faced by Black residents described above.¹⁴

SNAP Emergency Allotments

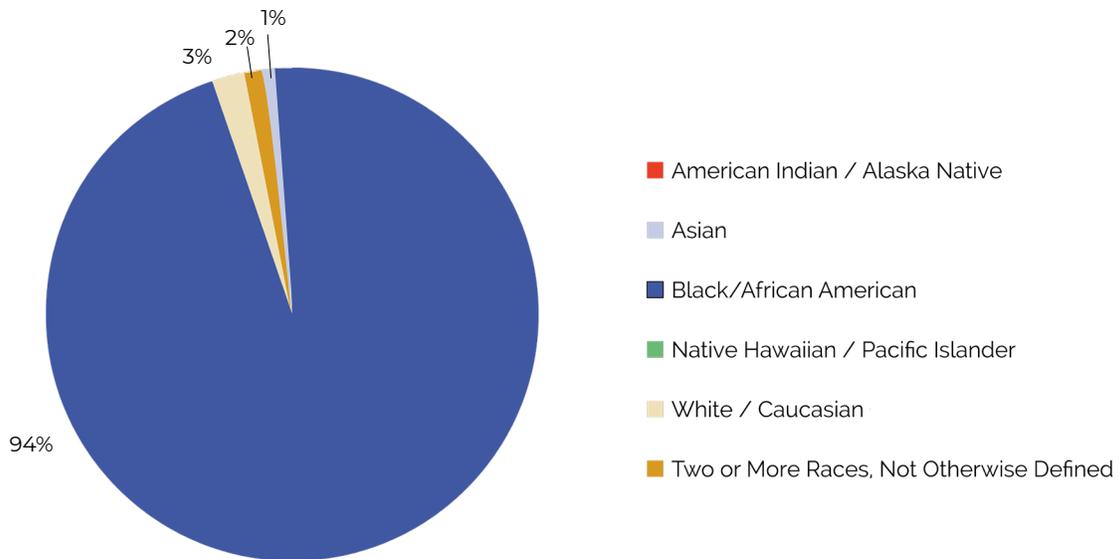
Throughout the pandemic, the District of Columbia has issued Emergency Allotments to over 90,000 District SNAP households, providing over \$14 million in extra food benefits each month. These extra benefits helped reduce food insecurity throughout the pandemic by providing additional food purchasing while supporting local food retailers and farmer's markets. On December 29, 2022 the Consolidated Appropriations Act of 2023 became law, bringing an end to SNAP Emergency Allotments on February 28, 2023. The District is working across agencies and with community partners and advocates to mitigate the impact of a return to pre-pandemic benefit levels.

Number of District Households Receiving SNAP Benefits, 2021 - 2022



Source: Government of the District of Columbia Department of Human Services – Economic Security Administration

Self-Reported Race of Individuals Participating in SNAP, 2021 - 2022



Source: Government of the District of Columbia Department of Human Services – Economic Security Administration

Online SNAP Purchasing

In 2020, the USDA authorized the District to start allowing SNAP customers to make online purchases, a critical step for expanding healthy food access in neighborhoods underserved by grocery stores and other fresh food options. Since then, DHS has onboarded online vendors such as Amazon, Instacart,

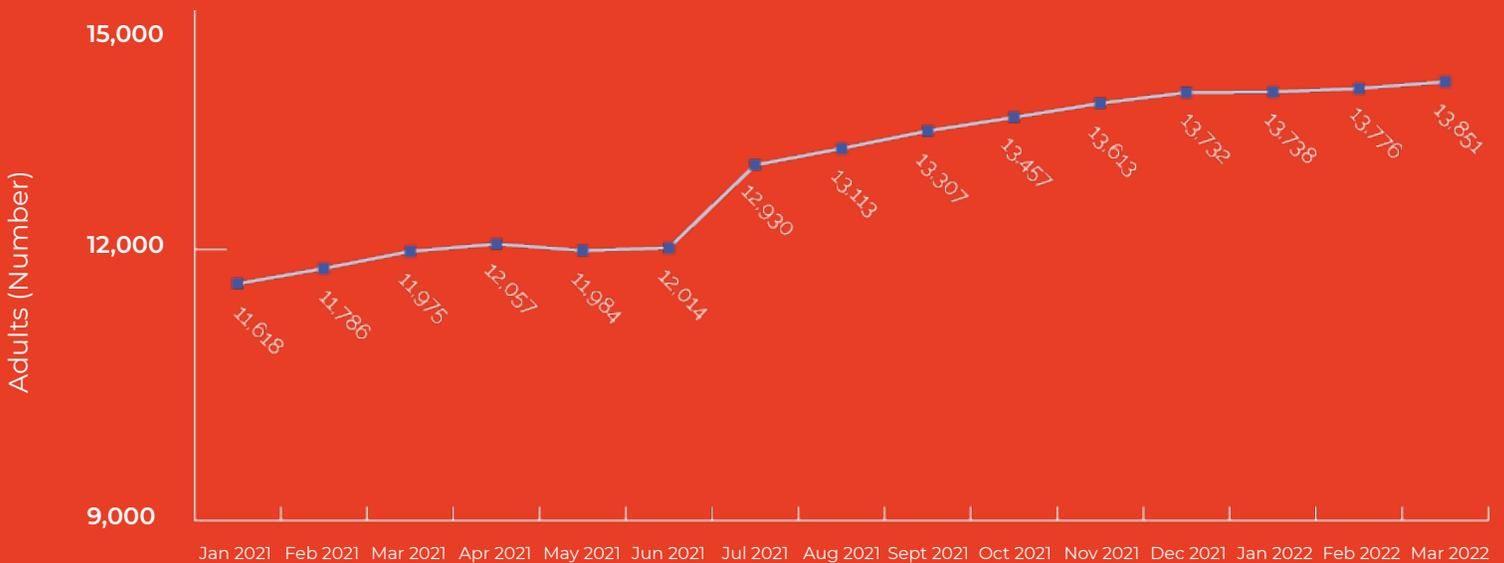
Safeway, and Giant to allow SNAP customers to purchase foods online for in-store pickup or home delivery. From March 2021 to March 2022, the percentage of SNAP online transactions nearly doubled from 7% to 13% of total SNAP benefit utilization.¹⁴

SNAP Participation Among Older Adults

SNAP participation grew among District seniors, from 11,618 to 13,851 individuals from January 2021 to March 2022. DHS is currently working to develop a simplified application for seniors applying for SNAP, which should encourage more seniors to enroll. It is

important to note that although older adults only account for 9.3% of all SNAP clients, 16.3% of all older adults in the District are participating in SNAP. This indicates that there is a high demand for food assistance within the demographic.

District Adults 65 Years and Over Receiving SNAP Benefits, 2021 - 2022



Source: Government of the District of Columbia Department of Human Services – Economic Security Administration

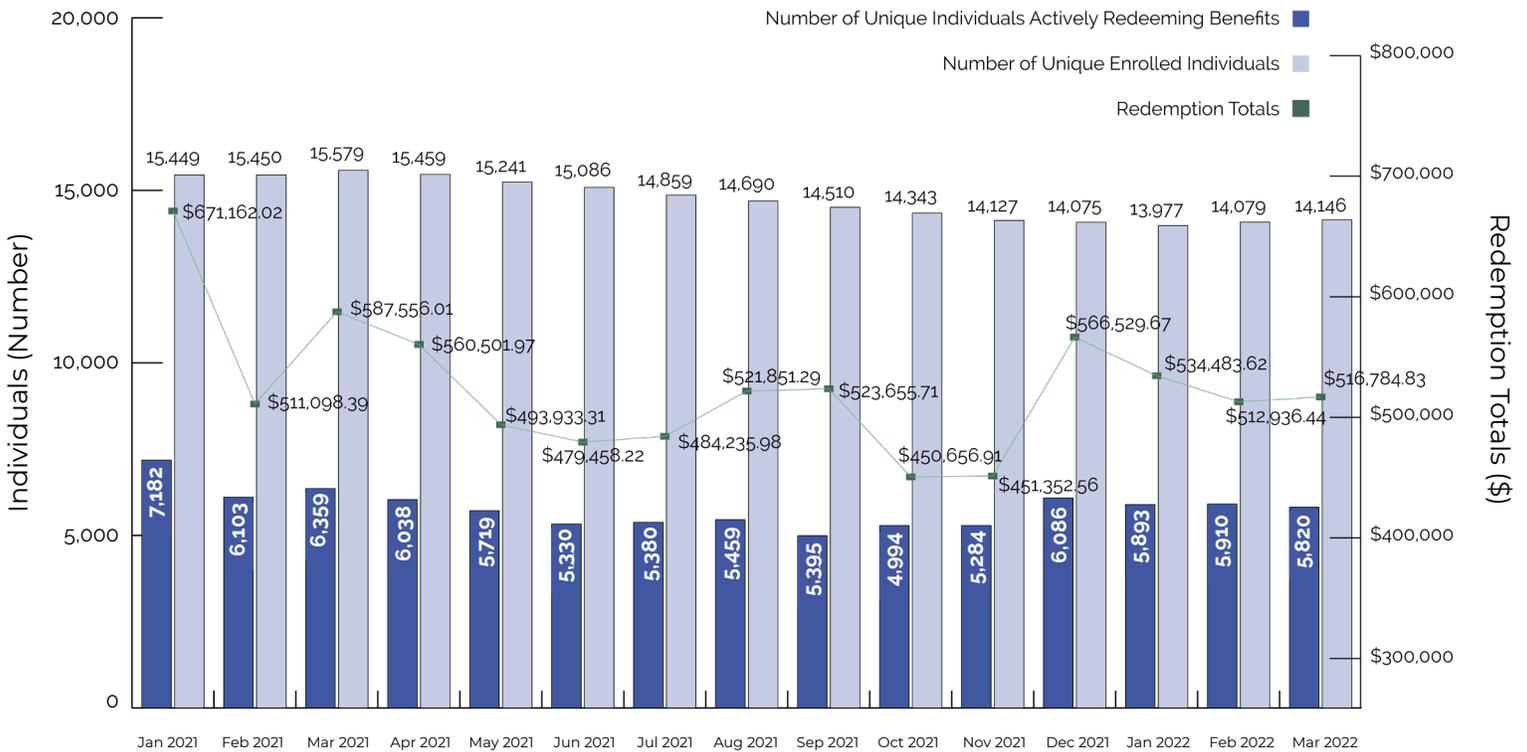
WIC

Participation in WIC, the federal nutrition assistance program for low-income pregnant and post-partum women and children aged birth to five, declined from January 2021 to March 2022. Total program enrollment decreased from 14,898 to 14,186 individuals between January 2020 and March 2022. The number of actively participating WIC customers also dropped from 7,182 to 5,820 individuals from January 2021 to March 2022.¹³

These drops in enrollment and participation, 8.2% and 19.0% respectively, occurred during a time when federal waivers allowed for increased flexibility for

WIC, including online counseling services and food purchases, waived recertifications, and increased benefits for fresh fruit and vegetables. These reductions in program enrollment and participation could be due to baby formula shortages and other supply chain challenges, which may have undercut the perceived value of the program. Additionally, because the program is targeted to such a specific population, program participants cycle through the program more frequently due to pregnancy status (women) and age (children). Nationally, WIC participation has also steadily declined since 2010.¹⁴

WIC Program Enrollment and Redemption, 2021 - 2022

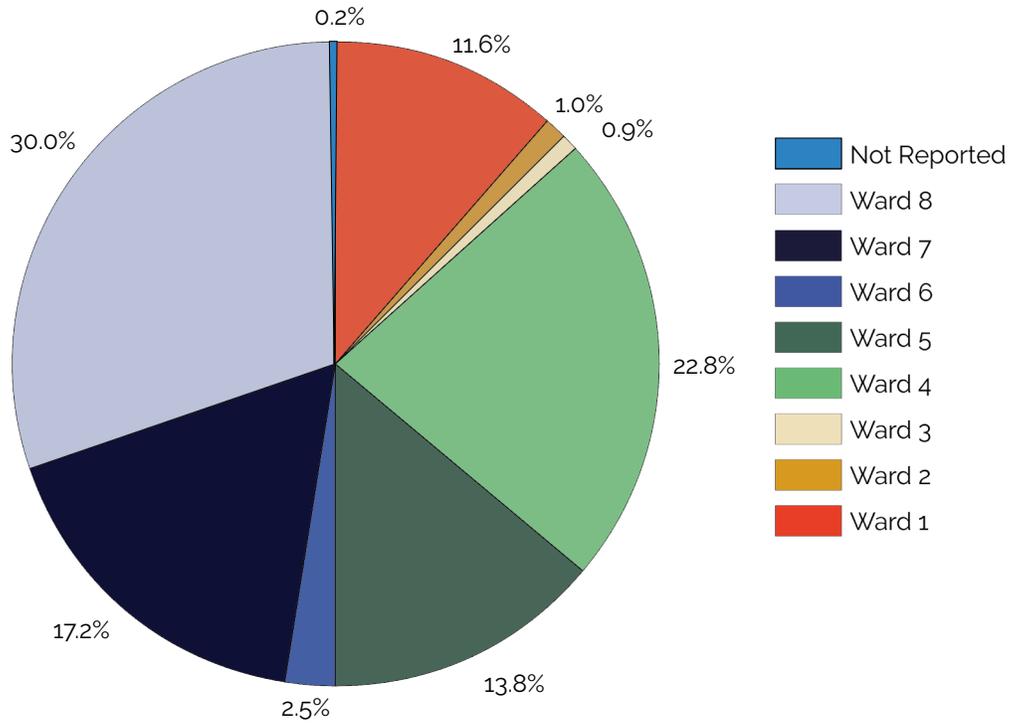


Source: Government of the District of Columbia Department of Health

WIC participation is higher in certain parts of the city and among certain racial and ethnic groups. Nearly three out of every four WIC customers live in Wards 4 (22.8%), 7 (17.2%), and 8 (30%). Almost 72% of participants identify as Black/African American

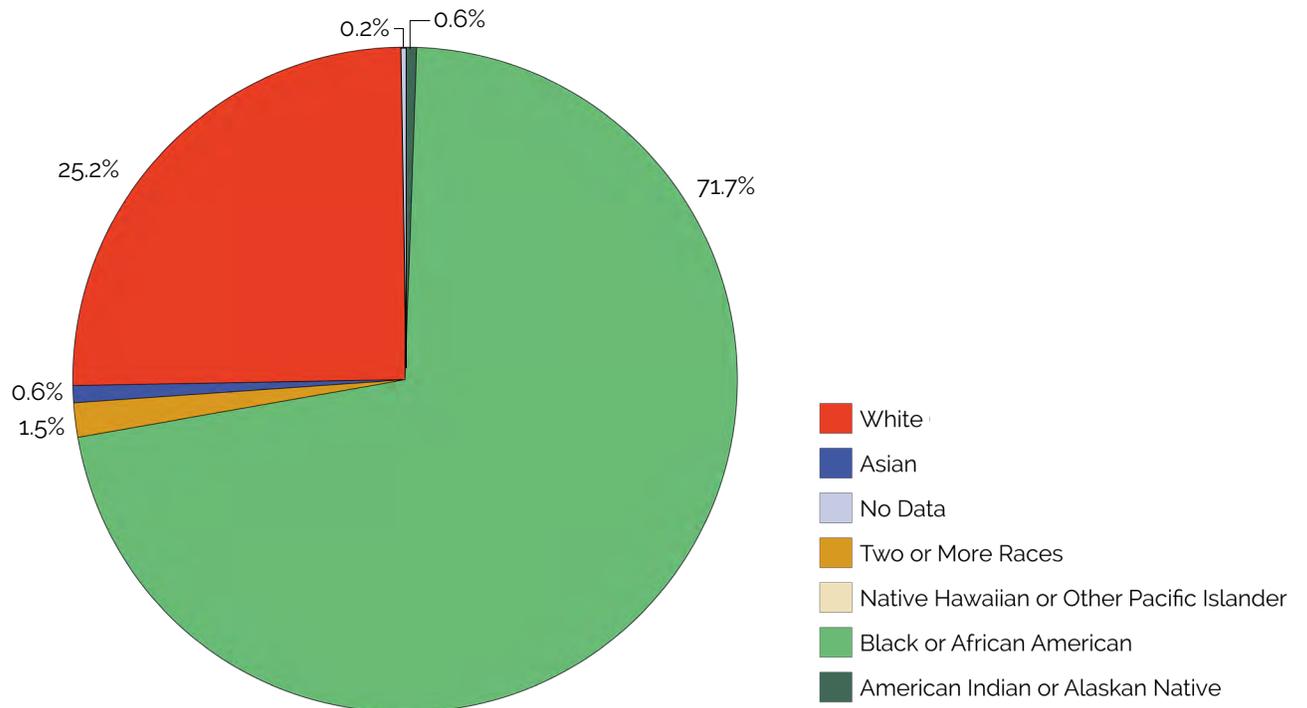
and 26% identify as Hispanic or Latino. These data mirror the higher risk of food insecurity experienced by Black and Hispanic or Latino residents in the District, described above.¹³

2021 WIC Participation Rates by Ward



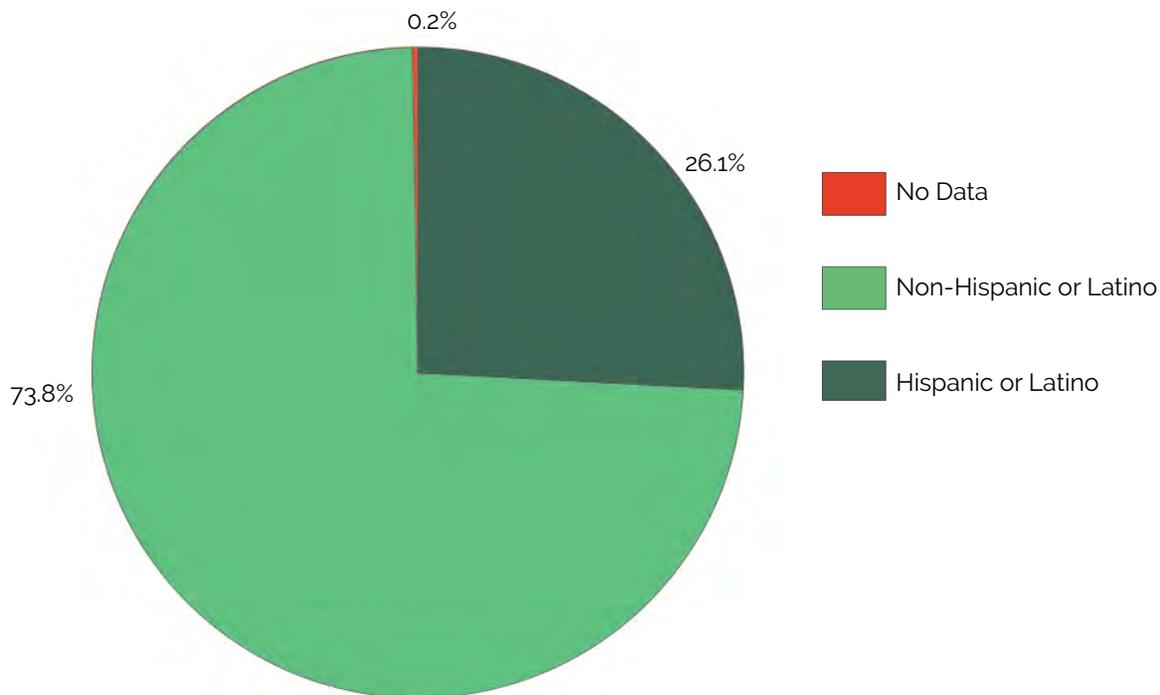
Source: Government of the District of Columbia Department of Health

Self Reported Race of Individuals Enrolled in WIC, 2021



Source: Government of the District of Columbia Department of Health

Self Reported Ethnicity of Individuals Enrolled in WIC, 2021



Source: Government of the District of Columbia Department of Health

WIC Modernization

Throughout 2021, DC Health increased the number of authorized WIC vendors and modernized the way benefits are distributed. These changes are focused on increasing the dignity, equity, and accessibility within WIC. DC Health has authorized nine new small format stores in Wards 5, 7, and 8 to accept WIC, enabling more WIC customers to shop in their neighborhoods. In 2022, DC Health rolled out the new WIC Electronic Benefit Transfer (EBT) cards, which allows customers to spend their benefits throughout the month, rather than all at once with a paper check. This modernization not only simplifies the accounting for vendors but increases flexibility and choice for clients.



Child Nutrition Programs

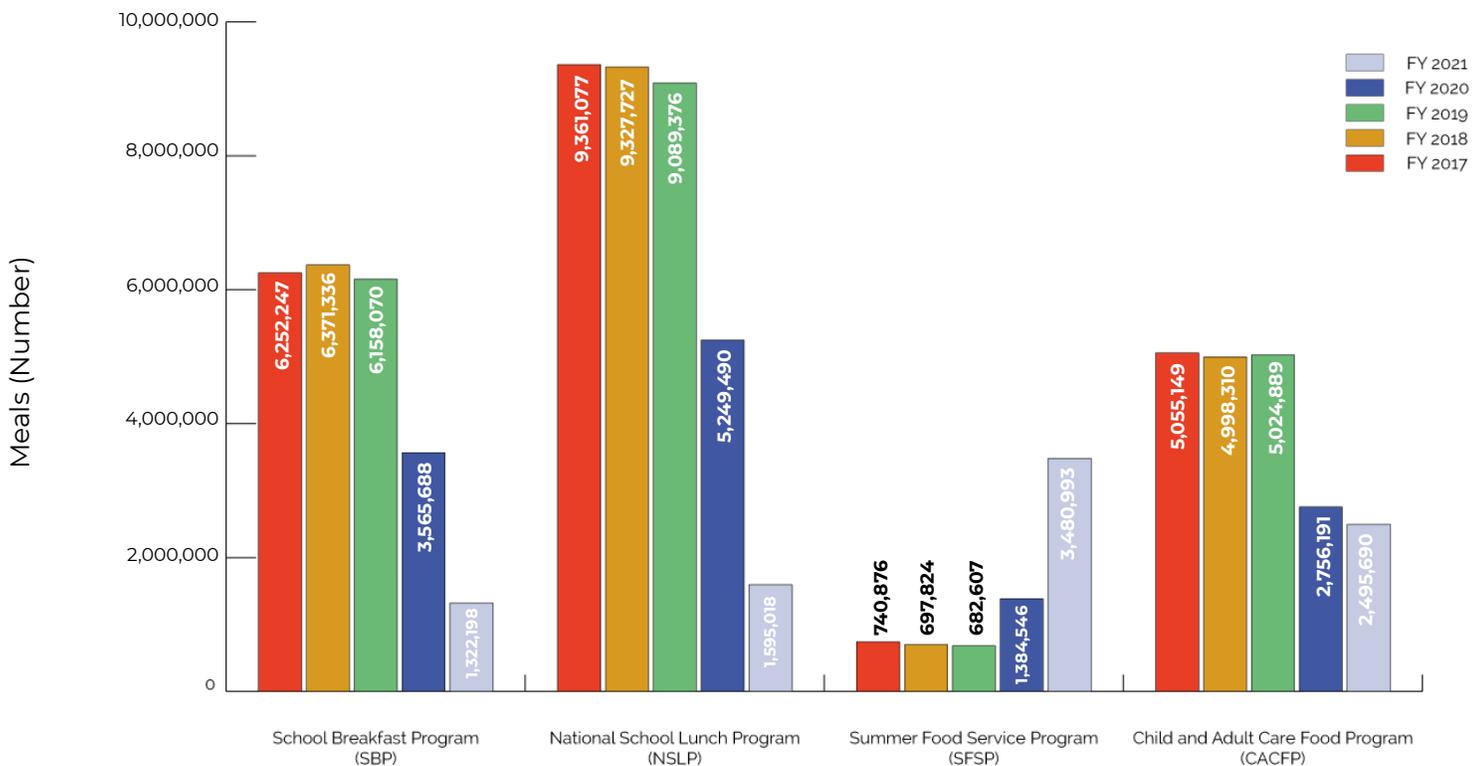
The Office of the State Superintendent of Education (OSSE) manages federally funded child nutrition programs in the District, including in schools, child and adult care facilities, and during the summer. The two largest programs, the National School Lunch Program (NSLP) and the School Breakfast Program (SBP), provide the important nutrition students need to excel in the classroom. For many students, school meals provide the majority of their calories for the day and are critical to combat childhood food insecurity.

The onset of the public health emergency significantly changed the way these programs operated. School closures in March 2020 drastically affected the ability of these programs to serve their participants. Although schools creatively pivoted to offer grab and go meals and other food distribution, the District saw steep declines in NSLP and SBP

participation in the 2020-2021 and 2021-2022 school years. During this time period, the USDA implemented several nationwide waivers, which allowed schools to serve meals at no cost to children while maintaining appropriate safety measures. Yet, even with these flexibilities in place, the total number of meals served to children dropped from approximately 21 million meals in FY19 to just under 13 million meals in FY20 to under 9 million meals in FY21.¹⁵

To account for these dramatic decreases in meal participation, the USDA created the Pandemic Electronic Benefit Transfer program which provided food benefits on an EBT card to families with children eligible to receive free or reduced-price school meals. DHS distributed \$40 million in P-EBT benefits to nearly 77,000 children in FY20 and \$93.9 million in benefits to 85,000 eligible children in FY21.¹⁴

Annual Number of Meals Served through Child Nutrition Programs, 2017 - 2021*



Source: Government of the District of Columbia Office of the State Superintendent of Education

*Seamless Summer Option (SSO) meals were included with SBP/NSLP until late FY20. All SSO meals for FY20 and FY21 were included into SBP/NSLP data to show trends over time.

District Funded Nutrition Assistance Programs

In addition to the federal programs described above, the District provides nutrition assistance to residents through several locally funded programs. DC Health administers these programs, awarding grants to community partners to operate them.

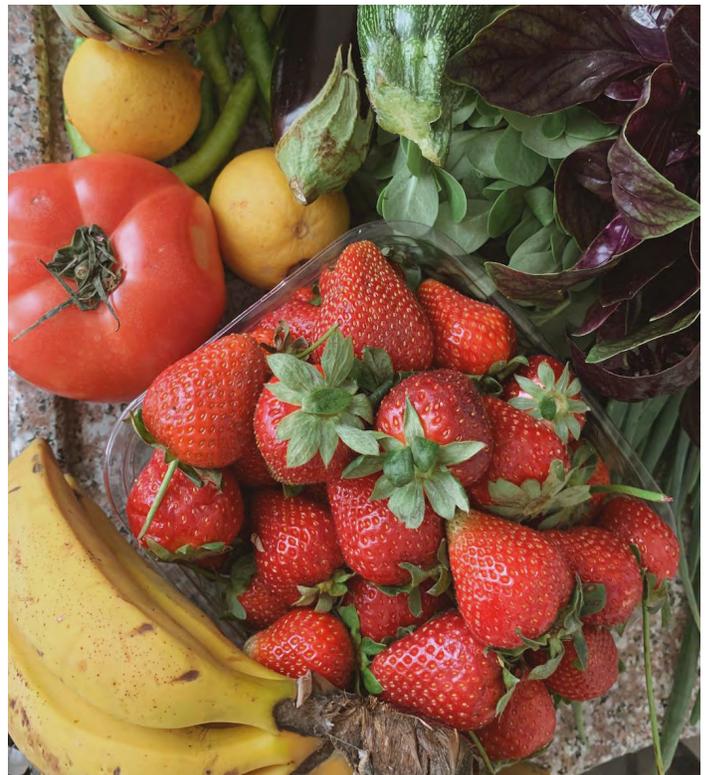
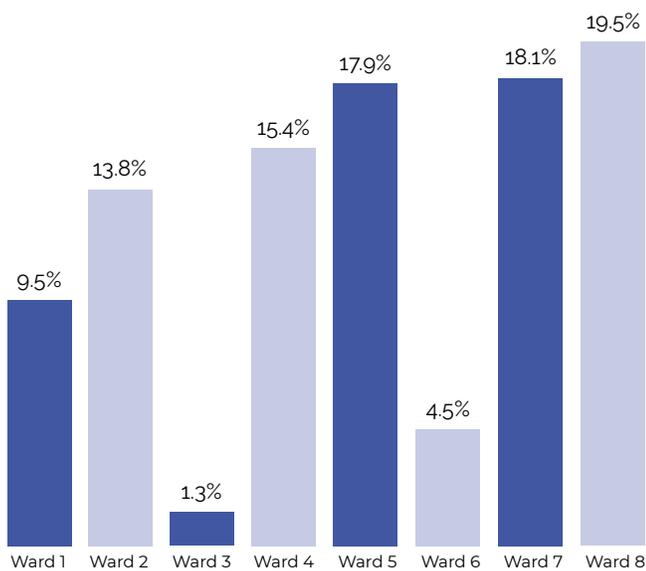
Joyful Food Markets

Operated by Martha's Table, Joyful Food Markets are pop-up monthly markets held in over 50 schools in Wards 7 and 8 where school families are invited to shop at no cost for a variety of fresh produce and shelf-stable pantry items. These markets transform schools with music, dancing, kids' activities, and recipe samples designed to get children and families excited about eating and cooking healthfully. In FY21, the program held 249 markets across the District, serving over 7,000 unique shoppers and distributing over 365,000 pounds of food (the equivalent of over 304,000 meals).¹³

Produce Plus

Operated by DC Greens in 2021 and FRESHFARM in 2022, Produce Plus provides vouchers to District residents with low incomes to purchase fresh food from farmers markets. In 2020 and 2021, the program was modified to follow COVID-19 safety protocols, providing program participants free home delivery or market pick-up of pre-packaged produce boxes with a value of \$20.00 per box. Participants could pick up boxes 10 times throughout the market season which ran from June 1 – September 30. The program reached a total of 4,798 participants from all eight Wards, with the greatest participation from Wards 5, 7, and 8.¹³

FY2021 Produce Plus Participants by Ward of Residence



CSFP and Grocery Plus

Operated by the Capital Area Food Bank, CSFP is a federally funded nutrition assistance program with matching District local funding for residents who are aged 60 years and older and low income. CSFP provides a monthly supplement of shelf-stable nutritious foods such as dry milk, canned fruits and vegetables, or canned meat. This program, combined with the Senior Farmers Market Nutrition Program, which provides CSFP participants with \$50 vouchers between June and October to be

spent on fresh fruits and vegetables from farmers markets, make up the Grocery Plus program. In FY21, 81% of the 5,411 participants in Grocery Plus identified as Black or African American, while 7.5% identified as white. Each year, Grocery Plus customers spend 100% of the farmers' market benefits, and there is often a wait-list to join the program, indicating the high interest and need for this type of program.¹³

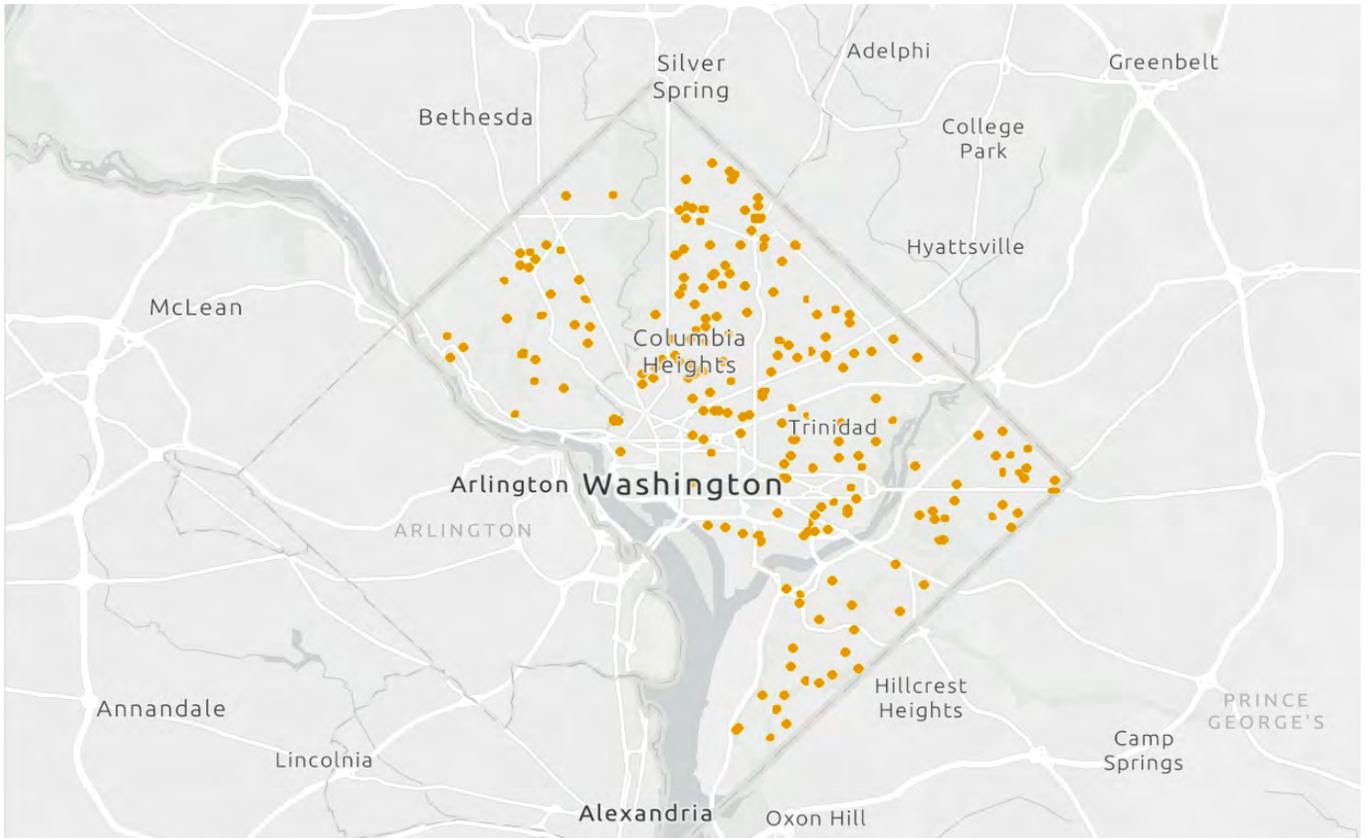
DACL Nutrition Programs

Department of Aging and Community Living (DACL) provides nutrition services to the District residents 60 years of age and older through community dining and home-delivered meals. At the onset of the public health emergency, DACL suspended its congregate dining services and quickly converted to meal delivery so that clients continued to have access to nutritious food. In FY 21, nearly 2 million prepared meals were delivered to 8,356 seniors. In July 2021, community dining sites incrementally reopened, allowing the seniors to resume much needed in-person socialization over meals in a safe manner. As of March 2022, nearly 2,000 seniors returned to in-person community dining sites.



Urban Agriculture

2022 Urban Farms and Community Gardens Map



Expanding [District urban agriculture](#) is key to expanding healthy food access and growing the local food economy. The District's Sustainable DC 2.0 Plan, published in 2018, sets the goal of adding 20 new acres of land under food cultivation by 2032. Since 2018, the District has added five acres of agriculture, for a total of 45.6 acres currently under cultivation. These 45.6 acres comprise of 107 public and private school gardens, 12 other education gardens, 70 community gardens, and 25 urban farms across all eight Wards.

The Department of Energy and Environment (DOEE) Office of Urban Agriculture administers multiple programs for residents and businesses to increase food production. This includes the Urban Agriculture Infrastructure and Operations Fund, which awarded \$67,712 to seven farms in 2021 and \$77,741 to eight farms in 2022. The fund-

ing supports farms to increase crop production and processing, improve distribution and access to fresh foods, increase agricultural education, and support socially disadvantaged farmers. DOEE also operates the Urban Farm Tax Abatement for private property owners using their land for urban farming.

Additionally, the Department of Parks and Recreation (DPR) administers the Urban Farm Park Partnership program, which has created several District urban farms including Common Good City Farm (Ward 1), the Farm at Kelly Miller operated by Dreaming Out Loud (Ward 7), and The Well at Oxon Run operated by DC Greens (Ward 8). The program invests additional resources into establishing urban farms on DPR properties such as Lederer Gardens (Ward 7) and a rooftop farm on top of Edgewood Recreation Center (Ward 5).

Local Food Economy

The local food economy includes the many local food businesses, entrepreneurs, and food system workers that provide a wide variety of cuisines and food products to District residents and visitors. The local food economy was signif-

icantly impacted by the COVID-19 public health emergency and has not fully recovered. This section compares 2021 data on the local food economy to data collected in 2016 for the DC Food Economy Study.¹⁶

Food Businesses

Local food businesses in the District have used creativity and perseverance to navigate the last few years, and the sector continues to feel the impact of the public health emergency. In almost every subsector, employment has yet to recover to 2016 levels. In 2022, 175 employees

worked in food manufacturing, down from 366 in 2016. Employment at food and drinking places is down from 53,813 in 2016 to 36,104 in 2021. And in food and beverage retail, 7,302 individuals were employed in 2021, compared to 8,125 in 2016.¹⁷

Direct Food Economy Employment and Wages in the District's Food Sectors and Subsectors (2001 - 2021)									
Food Sector	2001	2006	2011	2016	2021	Percent Change 2016 - 2021	Average Annual Wages 2016	Average Annual Wages 2021	Percent Change 2016 - 2021
Food Manufacturing	477	318	219	366	175	-52.2%	\$ 38,613	\$ 36,094	-6.5%
Beverage Manufacturing	5	9	33	146	218	49.3%	\$ 39,485	\$ 47,738	20.9%
Food and Grocery Product Wholesalers	768	809	736	658	443	-32.7%	\$ 64,384	\$ 76,655	19.1%
Alcoholic Beverage Merchant Wholesalers	564	586	541	689	492	-28.6%	\$ 85,107	\$ 83,373	-2.0%
Food and Beverage Retail	5,436	5,621	6,617	8,125	7,302	-10.1%	\$ 36,161	\$ 35,548	-1.7%
Subsector: Supermarkets/ Grocery Stores	3,817	3,583	4,391	5,058	5,264	4.1%	\$ 38,672	\$ 34,940	-9.7%
Food Services and Drinking Places	29,761	34,284	42,004	53,813	36,104	-32.9%	\$ 30,844	\$ 35,349	14.6%

Source: US Bureau of Labor and Statistics: Quarterly Census of Employment and Wages Data Tables

Food Workforce Data

The District's food workforce was one of the hardest hit at the start of the public health emergency and businesses continue to struggle to recruit enough staff to operate. In 2021, nearly 45,000 individuals were employed in food sector jobs in the District. This is significantly less than nearly 64,000 individuals employed by the District's direct food economy in 2016.^{16,17}

Individuals employed in the District's food sector continue to earn less than half

the average household income in the District. In 2016, the average annual income within the food and beverage retail sector was \$36,161, 49.0% of the District's median annual household income of \$72,935. In 2021, the average annual wages in the food and beverage sector were \$46,037, which amounts to 46.8% of the average household income of \$98,370. Those working for hourly wages in the food and beverage sector earned on average \$39,446, or 40.1% of the average household income.¹⁸



Commercial Kitchen Space

One of the biggest challenges faced by small food businesses and entrepreneurs in the District is the lack of affordable commercial kitchen space, aggregation space, and cold and dry storage facilities for food. The District has four food business incubators that provide shared commercial kitchen space, down from five in 2016. Three of those four incubators are located in Ward 5.¹⁶ This figure does not include the many commercial kitchens leasing space to one or several other businesses, or informally sharing kitchen space, a common practice in the District. The Department of Small and Local Business Development (DSLBD) has proactively matched commercial kitchen operators with entrepreneurs seeking kitchen space through its Commercial Kitchen Matchmaking Program since 2021. This process has revealed that demand for commercial kitchen space far outpaces the supply, with over 126 businesses requesting space, and 36 organizations with space to offer.



Food Incubators in the District			
Name	Address	Ward	Zoned as Industrial Land
EatsPlace	3607 Georgia Avenue NW	1	N
Mess Hall	703 Edgewood St NE	5	Y
Union Kitchen	1110 Congress Street NE	5	Y
Taste Makers	2800 10 th St NE	5	Y

Small Business Supports

Supporting small businesses is a top priority of DSLBD. The agency's Innovation and Equitable Development team offers numerous programs, grants, and opportunities for small businesses. These include the Aspire to Entrepreneurship program, the Made in DC Certification Program, and the Dream grants, among others. The agency also provides

technical assistance and training opportunities to support businesses applying for grants. The District provided over \$16 million in funding to small and local businesses across the city in 2021, many of which are food focused, and continues to offer grant opportunities for all eligible District businesses.



Food Business Investments by the District in 2021			
Implementing Agency	Grant Name	Total Investment	Number of Businesses Funded
DSLBD	Made in DC Market Grants	\$61,000	9
	ASPIRE	\$29,500	4
	DREAM	\$10,000	2
	Robust Retail	\$442,500	59
DMPED	Great Streets Retail	\$2,243,418	47
	Locally Made Manufacturing	\$1,000,000	4
	Neighborhood Prosperity Fund	\$3,185,000	8
	Food Access Fund	\$9,000,000	8
	Nourish DC	\$500,000	10
Total		\$16,471,418	151

Streateries

At the onset of the COVID-19 public health emergency, the Office of Planning (OP) evaluated opportunities to re-purpose public spaces to support food businesses and employees. One of these solutions was the Streateries program, in which OP partnered with the DC Department of Transportation (DDOT) to create a permit process for restaurants to utilize sidewalk and street spaces to establish or expand outdoor dining space. This flexibility allowed

restaurants to continue safe, health compliant meal service and allowed retailers to offer curbside pick-up and delivery. This innovative use of public space amassed 381 permits through the life of the program and supported thousands of food service workers, businesses, and residents with seamless food service operations. DDOT is working with other District agencies to create a permanent Stretery Program as stretaries are here to stay.

Conclusion

As the District's food system continues to recover and grow, the Bowser administration is committed to prioritizing food access and equity across the city. Though there is still work to be done for BIPOC residents, seniors, and children living in the District who are at heightened risk of food insecurity, our efforts seek to address these inequities by taking a comprehensive approach and centering racial equity in all that we do.

Our food system is resilient, and the actions and steps we take now to increase sustainability, grow urban agriculture, expand access to food and nutrition programs, and combat climate change will continue to strengthen that system. We look forward to continuing to serve all of DC and continuing the District's legacy of being an internationally recognized food policy innovator and leader for years to come.



¹ U.S. Department of Agriculture: Economic Research Service. Definitions of Food Security. October 17, 2022. <https://www.ers.usda.gov/topics/food-nutrition-assistance/food-security-in-the-u-s/definitions-of-food-security>

² U.S. Department of Agriculture: Economic Research Service. Household Food Security in the United States in 2017. September 2018. Pg 20. <https://www.ers.usda.gov/webdocs/publications/90023/err-256.pdf?v=0>

³ U.S. Department of Agriculture: Economic Research Service. Household Food Security in the United States in 2021. September 2022. Pg 25. <https://www.ers.usda.gov/webdocs/publications/104656/err-309.pdf?v=8985.1>

⁴ U.S. Department of Labor: Bureau of Labor Statistics. May 2021 Estimates: Occupational Employment and Wage Statistics (OEWS) Survey. May 2021.

⁵ Food Research and Action Center. The Impact of Poverty, Food Insecurity, and Poor Nutrition on Health and WellBeing. December 2017. <http://frac.org/wp-content/uploads/hunger-health-impact-poverty-food-insecurity-healthwell-being.pdf>

⁶ Feeding America. Map the Meal Gap. Child Food Insecurity in District of Columbia: Before COVID-19. Accessed July 14, 2021. <https://map.feedingamerica.org/county/2019/child/district-of-columbia>

⁷ U.S. Census Bureau Household Pulse Survey. Phases 3 – 3.4. May 9, 2022. <https://www.census.gov/programssurveys/household-pulse-survey.html>

⁸ Washington DC Economic Partnership. Grocery Store Expansion in Washington, DC. July 2021. <https://wdcep.maps.arcgis.com/apps/MapJournal/index.html?appid=c8b8e49c48614835b740279393d66356>

⁹ Capital Impact Partners. Nourish DC Collaborative.2022. <https://www.capitalimpact.org/programs/nourish-dccollaborative/>

¹⁰ District of Columbia Office of the Deputy Mayor for Planning and Economic Development, District of Columbia Office of Planning. Supermarket Tax Incentives. Open Data DC. February 1, 2019. <https://opendata.dc.gov/datasets/DCGIS::supermarket-tax-incentives/explore?location=38.889264%2C76.979728%2C12.50>

¹¹ D.C. Law 24-0127, Reopen Washington Dc Alcoholic Beverage Regulation Amendment Act of 2021, D.C. Official Code Section 25-112 et seq. <https://lims.dccouncil.gov/Legislation/B24-0044>

¹² Data provided by District of Columbia Department of Health. Independent analysis provided by OP.

¹³ Data provided by District of Columbia Department of Human Services. Independent analysis provided by OP.

¹⁴ U.S. Department of Agriculture Food and Nutrition Services. WIC Data Tables: National Level Summary. November 10, 2022. <https://www.fns.usda.gov/pd/wic-program>

¹⁵ Data provided by District of Columbia Office of the State Superintendent of Education. Independent analysis provided by OP.

¹⁶ DC Food Policy Council. DC Food Economy Study 2019. September 2019. <https://dcfoodpolicycouncil.org.files.wordpress.com/2019/09/food-economy-study.pdf>

¹⁷ Bureau of Labor and Statistics: Quarterly Census of Employment and Wages Data Tables. All Counties in District of Columbia 2021 Annual Averages. September 7, 2022. https://data.bls.gov/cew/apps/data_views/data_views.htm#tab=Tables

¹⁸ Bureau of Labor and Statistics: Occupational Employment and Wage Statistics Survey. May 2021 Estimates. May 2021. www.bls.gov/oes/tables.htm