

An Assessment of San Francisco's Farmers Markets



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Melons, onions and peppers at Heart of the City Farmers' Market.

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Introduction

The City of San Francisco has expressed interest in increasing the number of farmers' markets in the city. In January 2007, the Board of Supervisors passed the Farmers' Market Ordinance (o0029-07), requiring the agriculture commissioner to conduct a needs assessment of the neighborhoods in San Francisco that would be able to support a farmers' market. The ordinance requested a focus on underserved neighborhoods, where markets would support low-income access to healthy local produce without detrimentally impacting local businesses.

This assessment examines the necessary requirements for a neighborhood to support a market, including physical location, community support, financial backing, and the specific needs of low income neighborhoods. For the purposes of this report, a fully supported, successful market is one that is able to operate in a financially sustainable manner, without a need for outside funding.

This assessment also examines the city's existing system of support for markets, explores the leading causes of market failure and addresses the ordinance's request for potential new markets. A review of best practices in other cities helps to lay the framework for future city-wide policies on farmers' markets through detailed policy recommendations.

Methods:

To meet the goals of the ordinance, all the farmers' markets in San Francisco were observed and their managers interviewed, as were representatives from large farmers' market organizations.

The managers were surveyed to determine their opinions of the minimum resources necessary to support a market and necessary attributes of suitable locations. Programs in other major cities were examined, as were studies on low-income markets throughout the nation. Each of the Board of Supervisors' offices were contacted to learn the current demand for farmers' markets in the various neighborhoods throughout the city.



Fresh produce at San Francisco's farmers' markets entices shoppers on many days each week, including at the Ferry Plaza Farmers' Market (above) and at the Heart of the City Farmers' Market (below).



Findings

Current Situation of Existing Markets

San Francisco currently has 9 distinct farmers' markets with two occurring twice a week, bringing the total number of markets to 11. The markets range in size from 6 stalls to 130, and from less than 100 customers to 25,000. Some markets are self sufficient and profitable while others are heavily subsidized. Based on interviews with each market's manager, below are brief summaries of San Francisco's markets.

Alemany

Saturdays 5am-5pm, year round.



The Alemany Farmers' Market is the oldest certified farmers' market in California. It has an estimated 5000-8000 customers, 60 stalls in the winter, 120 in the summer and room for 135 stalls. It serves the entire community of San Francisco and the Bay Area, and offers prices lower than most other markets. Alemany succeeds because it minimizes its costs, works with the local homeless population by enlisting them to watch over the market, and convinces farmers, especially organic ones, to lower their prices. Although the market is profitable, one major problem it faces is a lack of funds for the upkeep of the aging facility, which needs renovation. The market is operated by the San Francisco Real Estate Department.



Brightly colored murals liven the stalls of the city-run Alemany Farmers' Market.

Bayview

Wednesdays 8:30 am-12:30pm, seasonal market.

The Bayview Farmers' Market has 30-100 customers, 5 stalls, and no wait list. It is actively encouraging new vendors. Of the 5 stalls, two are staffed by farmers and the remainder is staffed by San Francisco Environment Department (SFE) intern-volunteers. The volunteers sell produce for farmers from Heart of the City Farmers' Market who are unable to physically come to the market. The market serves the immediate community of Bayview Hunters Point.

Bayview Farmers' Market was created in 2005 through a grant to SFE, and was managed by the Pacific Coast Farmers' Market Association, but the market was not profitable for their farmers. In 2006 Farms to Grow took control, and the market is now managed by a local non-profit, GIRLS 2000, with a three-year \$280,000 USDA grant procured with the help of SFE. SFE also assists in the market's operation, conducts nutrition education and market outreach, and manages the distribution of over \$10,000 in free market coupons to residents (of which about \$50 are redeemed each week). Many other city departments also support the market.

Crocker Galleria

Thursdays, 11am-3pm, year round market.

The Crocker Galleria Farmers' Market has about 3000 customers, 19 stalls, and a very long wait list. The market cannot grow larger due to the physical limitations of its space. It mainly serves a lunchtime crowd of people working in the Financial District and Union Square area. The market loses a small amount of money on a weekly basis, but is assisted with advertising costs by the host, Crocker Galleria Mall. Problems for the market include parking, size constraints, permit complications, and ensuring that store owners within the mall do not feel as though they are competing with the market. It is managed by the California Farmers' Market Association (CFMA).

Ferry Plaza

Tuesdays 10am-2pm, Saturdays 8am-2pm, year round market.

On Tuesdays, the Ferry Plaza Farmers' Market has about 5000 customers and 30 stalls, and on Saturdays it has up to 25,000 customers and 75 stalls. Although there is room and a long waiting list, the market is not currently taking on new vendors because it wishes to avoid excess competition amongst its farmers. The Ferry Plaza Farmers' Market serves the entire community of San Francisco and many tourists. It succeeds because it is well established and has exceptionally high quality food. Problems for this market include a lack of parking for both customers and farmers' trucks, and a lack of coordination with the city regarding parking and other issues. It is operated by the Center for Urban Education about Sustainable Agriculture (CUESA).



Fresh greens from the Ferry Plaza Farmers' Market.

Fillmore

Saturdays 9am-1pm, seasonal market.

The Fillmore Farmers' Market has about 1000 customers, 20 stalls, and 25 more vendors on a wait list, but cannot grow due to the physical limitations of its space. It serves the immediate community of Western Addition, Pacific Heights and Japantown, and depends on a loyal, local customer base. Problems include parking, and initial difficulties securing a street closure permit. It is managed by the Pacific Coast Farmers' Market Association (PCFMA), and the neighboring Fillmore Center aids the market by allowing the market to use the Center's plaza space.



Green grapes and other fresh fruit are sold at the Heart of the City Farmers' Market.

Heart of the City

Wednesdays and Sundays, 7am-5pm, year round.

On Wednesdays the Heart of the City Farmers' Market has about 6,000 customers and 70 stalls. On Sundays it has about 3000 customers and 50 stalls. The market is 27 years old and well established, so there is a 6-10 year wait list for acquiring a stall. The market serves the immediate community of the Tenderloin, Civic Center, Market Street, and is also a Wednesday lunchtime destination for many people that work in the area. It works with the local homeless population by employing them to help unload vans. In order to keep its stall fees low, the market lowers its costs by minimizing advertising and other extras. Prices are lower at this market than many other markets. Problems include theft, and other crimes. It is managed by the Heart of the City Farmers' Market non-profit.



Kaiser

Wednesdays 10am-2pm, year round market.

The Kaiser Farmers' Market has about 250 customers, 8 stalls, and several vendors on a wait list, but cannot grow due to the physical limitations of its space. It serves the immediate community of Kaiser Hospital employees and patients as well as local community members in the Western Addition. The market loses money on a weekly basis and has problems with parking and its size constraints. It is managed by the Pacific Coast Farmers' Market Association (PCFMA), and helped by the neighboring Kaiser Hospital with advertising and promotion.

Noe Valley

Saturdays 8am-1pm, year round.

The Noe Valley Farmers' Market has about 1800 customers, 14 to 15 stalls. It is currently at full capacity due to the physical and parking limitations of its space, but there is no wait list. It serves the immediate community of Noe Valley, and depends on a loyal, local customer base. Problems for the market include parking and volunteer recruitment. It was created by the community in response to the closure of Real Foods market, and is managed by the Noe Valley Farmers' Market association through volunteers.

Parkmerced

Saturdays 10am-2pm, seasonal market,

The Parkmerced Farmers' Market is in its first season and has about 25 stalls. The market's problems include coping with the perpetually foggy weather in Parkmerced. It is managed by the California Farmers' Market Association (CFMA), and the Parkmerced residential development aids with market promotion and advertising.

Markets that have failed

Although most of the markets in San Francisco are successful, several markets have failed in recent years. The Ferry Plaza closed its Sunday and Thursday night markets, due to lack of interest. Markets at the Cannery and Mission Village also closed as did a Chinatown Night Market. For the past few years, the Marina district has been struggling to support a market. The California Farmers' Market Association ran a market on Steiner Street, but due to logistics moved it to the Marina Middle School on Fillmore Street. This year here have been two separate unsuccessful attempts to operate a market in the Marina.



Sampling is encouraged at farmers' markets.

Minimal Needs of a Market

A successful farmers' market must have a suitable physical location, adequate community support, and secure financial support for start up costs.

Location

The location must have:

Ample Space- The location should be large enough to hold an adequate number of vendors (minimally 20-30) so prices will be competitive and market revenue from vendor stall fees can cover operating costs.

Adequate Parking- Parking is currently a problem for most of San Francisco markets. Farmers must have room to turn around and park their vans and trucks, customers must have parking, and small businesses must not lose their parking.

Visible/Accessible- The area must have adequate urban density, with heavy foot traffic and/or easy public transportation to attract crowds (Large established markets such as Alemany circumvent this issue by becoming a destination location).

Weather –Sunnier days attract more customers. Market managers cited fog as a problem for markets in the Western side of the city.

Community

The community must be:

Loyal – Residents must choose to support the markets over other options for produce. Markets instill loyalty by tailoring their markets to community needs, providing a space for community groups to advertise, a local gathering place or a venue for local musicians.

Supportive- The community must care about supporting small farmers, and perhaps be willing to pay more for organic goods.

United- One small group must not speak for the majority of the community in determining the style and feel of the market. Small businesses must benefit from market crowds rather than feel isolated.

Financial Support

According to surveyed managers, the cost of operating a medium sized new market for one year can be \$60,000. About half of this cost can be covered by yearly vendor stall fees, which range from \$25-\$50 per stall per day; the rest must come from other sources. Initial costs can include permit fees, rent, staff time and advertising. One farmers' market association estimated it spends \$16,000-18,000 per market on advertising and promotion alone.

Many markets cannot cover long-term costs, such as the market manager's salary and rent, solely with revenue from the vendor stall fees. They must rely on subsidies to cover their remaining costs or they must grow large enough to attract a critical mass of vendors to become self-sufficient. Nationally, 18% of markets are not self-sufficient and rely on grants or other subsidies (Becker 2006).

Forms of subsidies for San Francisco's markets include:

Free rent – Alemany, Heart of the City,

Extensive volunteer hours – Noe Valley, Ferry Plaza

Support from a large farmers' market organization– Kaiser, Fillmore, Parkmerced, Galleria

Support from outside organization – Kaiser (Kaiser Hospital), Fillmore (Fillmore Center), Parkmerced (Parkmerced residential development)

Grants – Bayview

Support from City and County of San Francisco - Alemany

Although small markets sometimes struggle, most larger markets are quite successful. Profits are often reinvested in outreach programs, donated to other community based non-profits, or utilized to create new farmers' markets in other neighborhoods.

Causes of Market Failure

Markets depend on a delicate balance between customers, vendors and the administration. The positive cycle of growth for a market begins with an increase in the customer base, which allows the market to support more vendors. The additional vendors provide additional stall fees, bringing greater revenue to the organization. The added revenue supports more advertising and outreach programs, which in turn attracts more customers. Conversely, a small market gets smaller because it fails to attract customers, causing vendors to leave, administrative revenue to decrease, and eliminating a possible budget for advertising and outreach.

A seven-year study of the Oregon's farmers' markets revealed 62 new markets opening but 32 closing. This represents a success rate slightly less than that of small businesses (Stephenson, Lev and Mattson, 2006). According to the study, market failures correlated to small market size (between 4 and 20 stalls), a lack of variety in products, insufficient administrative revenue, low manager salaries, and high manager turnover, all of which may be anticipated and accounted for with proper planning prior to launching a new market.

Other Considerations

Income

The level of income in a neighborhood greatly influences its ability to sustain a market. In higher income areas residents can afford to volunteer at markets and pay a premium for organic goods. In lower income areas such as the Bayview, market staff is mostly subsidized and grower support (profit) is challenged because of the lack of income. A national conference on farmers' markets concluded that low-income markets are becoming more and more difficult to support and that perhaps low income neighborhoods simply lack the necessary income to support a market (Fisher, Kielty et al, 1999).

Low income markets face challenges such as:

Balance – Prices must be affordable for consumers but fair for farmers. Low income markets generally encourage farmers to keep their prices as low as possible, meaning farmers need to sell large volumes of their product to stay in business.

Awareness – Nutrition education and consumer awareness of fresh food preparation may be lower in certain low income neighborhoods. There may also be a need to change patterns of food consumption and frequency of shopping.

Perception – There remains a perception that farmers' markets are expensive and upscale, despite direct comparisons of markets and their neighboring grocery stores show that markets are cheaper than conventional grocery stores (Gaudette, 2007) (Southland 2001).

Competition - Not all low income neighborhoods are underserved. Some low-income neighborhoods feature an abundance of produce stores with reasonable prices and/or numerous food pantries giving food for free. Farmers' markets may not be successful with this type of competition.



Heart of the City is a successful low-income market.

Permits

Many managers interviewed expressed great frustration with the complicated and time consuming permit process necessary to establish a market in San Francisco. Markets may fall under a variety of city permit categories, and managers reported receiving conflicting information as to which permits were necessary.

Necessary local permits/approval can include: Public Works, Parking and Traffic, Environmental Health, Planning, Parks and Recreation, Fire/Police, Schools, and occasionally Real Estate, Redevelopment, or Port Authority as well. The Agricultural Commissioner ultimately is responsible for issuing a certified farmers market certificate when all local permits have been approved.

EBT/Food Stamps and WIC Acceptance

Three markets have not yet complied with San Francisco's new ordinance requiring all markets to accept EBT/ food stamps and other food assistance programs. Currently eight markets are in compliance, with the rest expected to comply in the near future. Many markets have quite successful EBT programs, while other managers indicated that they have had no demand at their market for EBT. Some managers have also struggled with the difficulties of acquiring a wireless point of sale device to process the EBT transactions because their usage was too low to qualify for a free device.



An example of an EBT card.



All markets that accept EBT were provided with copies of this poster.

Key factors of EBT use at markets include:

Complicated Transactions: EBT Cards must be swiped at a Point of Sale battery powered terminal (or processed via a phone call) by a market manager, in exchange for tokens that can be given to farmers for their products. Food stamp recipients may have difficulty tracking down the manager and/or understanding the token procedure.

Awareness- Human Service Agency/ San Francisco Food Systems distributed 40,000 brochures to food stamp recipients and community organizations to raise awareness that EBT may be used at farmers' markets, but many EBT recipients may still be unaware of the program.

Success – From 2006 to 2007, EBT usage at Alemany, Heart of the City and Ferry Plaza increased, suggesting that recent outreach programs have been successful. Ale-

many has already accepted more EBT in the first half of 2007 than in all of 2006. Anecdotal data from Fillmore and Kaiser Markets also suggest increases in food assistance program use.



Tokens make it easy for farmers to accept food stamps during a busy market day without any significant hassles or wasted time.

Location Suggestions

In choosing possible locations for new farmers' markets, the importance of the community's support deserves utmost attention. Both the Pacific Coast Farmers' Market Association and the California Farmers' Market Association have been contacted by neighborhood organizations interested in bringing a market to their neighborhood. Interested neighborhoods include the Marina, Panhandle, Presidio and several neighborhoods within District 11. Suitable locations for markets depend on the proximity to neighborhoods that are relatively dense, the distance from competition, and ability to serve many income levels.

Within a particular neighborhood, schools and parks are two areas that could fulfill many of the location-based criteria previously discussed because they are usually easily accessible, with adequate room for many stalls and a reasonable amount of parking.

Density

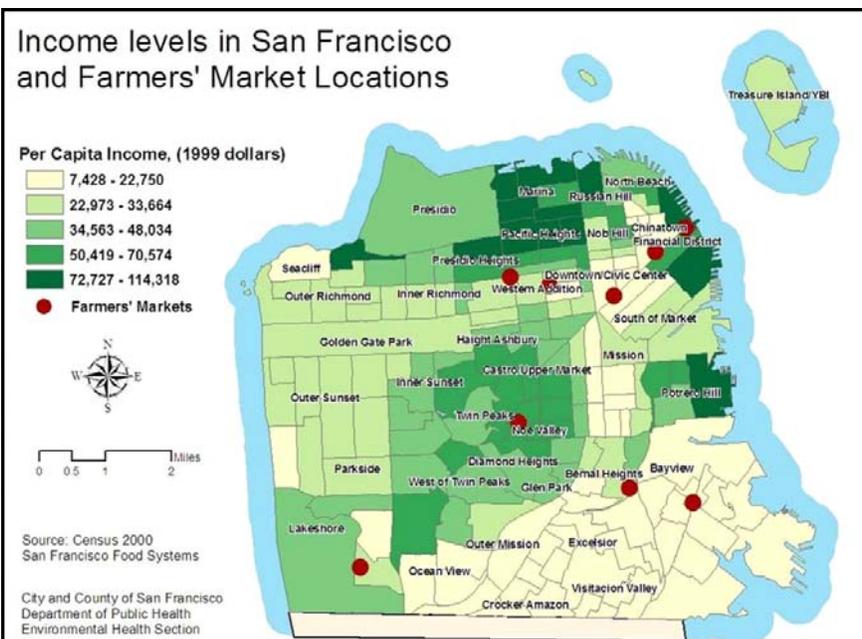
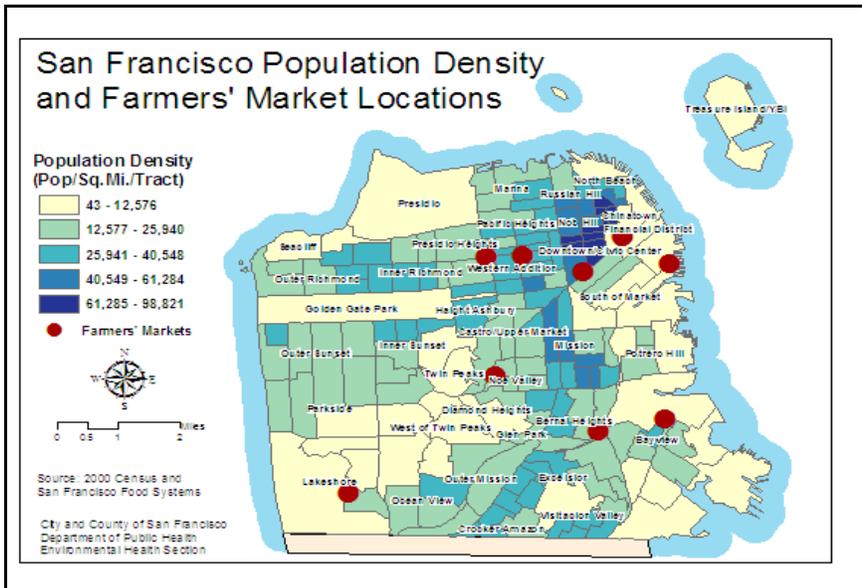
A market must be in an area of adequate urban density to ensure a supportive customer base. As the map illustrates, the majority of current markets border populous areas. There are several populous regions in the south and in the west that are underrepresented by markets.

Competition

Neighborhoods with strong traditions of abundant access to inexpensive produce, such as the Mission and Chinatown, may have difficulty sustaining farmers' markets. Markets may also face competition from neighboring farmers' markets.

Low Income Food Access

Farmers' markets can sometimes be a difficult way to increase access to fresh produce for neighborhoods lacking access to fresh produce. Markets may be more successful if they are situated near the border between low and middle income areas. These markets, such as the Fillmore Farmers' Market, can become fiscally viable while still serving low income areas.



Best Practices– Ideas from Other Cities

With a population of approximately 750,000, San Francisco currently has 11 markets. San Francisco has fewer markets per capita than many other West Coast cities such as Sacramento, Oakland, and Portland.

Farmers’ Markets and Population in Major Cities

City	2006 Population*	# of Farmers’ Markets**
Chicago, Illinois	2,833,321	31
San Jose, California	929,936	6
San Francisco, California	744,041	9
Austin, Texas	709,893	7
Seattle, Washington	582,454	12
Milwaukee, Wisconsin	573,358	9
Portland, Oregon	537,081	15
Sacramento, California	453,781	11
Oakland, California	397,067	13
Santa Monica, California	84,084	4

* Estimates from US Census Bureau (projected from 2000 Census)

** Farmers’ markets count based on best available data

Many other cities have taken the initiative to support their farmers’ markets through holding monthly market manager meetings, city-wide advertising campaigns, or city-wide market coordinators. Here are a few key examples of innovative methods that San Francisco could consider:

Seattle: Yearly market manager meetings

The farmers’ market managers of Seattle attend yearly meetings with all market managers from King County of Washington State. Although these are primarily organized to discuss Health Department issues and concerns, they offer an excellent method to improve market collaboration strategies on such issues as general education campaigns and advertising. The meetings also provide an opportunity for managers to form a support group to learn from the challenges and successes that other managers have faced.

Santa Monica: Farmers’ market supervisor

The City of Santa Monica currently operates four farmers’ markets, and employs a farmers’ market supervisor as well as market coordinators/market managers. The supervisor serves as a key liaison between the city, community groups and the market management. The supervisor’s roles include: addressing local merchant concerns/general complaints, ensuring all markets are in compliance with city, state and federal legislation, facilitating food nutrition program acceptance, and proposing new legislation as needed. The supervisor connects the markets to programs such as the school district’s salad bar program, the sustainable cities program, chef demonstration programs, and festivals and special events.

Chicago: Support, sponsorship, and city-wide advertising.

The City of Chicago manages 24 markets through the Mayor’s Office of Special Events. The market coordinator works closely with Planning, Health, Transportation and the Police Departments to ensure that the markets operate smoothly, and all related permit fees are waived. The program receives a small budget from the city and retains all of the \$15 stall fees. Additionally, the Department of Sponsorship arranges at least one market sponsor each year for all of Chicago’s city-run markets. For a fee, the sponsor is permitted to place their logo on all market brochures and banners, and to set up demonstration tents at various markets.

The city also advertises its markets in many ways. Banners, brochures, and posters are created by the city's graphic artists, and advertisements are placed in publications such as the magazine *TimeOut Chicago*. The advertisements usually direct interested consumers to a website, www.chicagofarmersmarkets.us, which includes the hours and locations of all the farmers' markets in the city, including independently run markets. Lastly, the markets benefit from a public access television show which features local chefs purchasing items from the farmers' markets and creating meals at their restaurants that are easy for the public to recreate at home.

Oregon: Coordinating support organization

The Oregon Farmers' Market Association (OFMA) is a non-profit organization dedicated to supporting local markets and sustaining Oregon's local agricultural system. OFMA offers many services and support systems for markets. Their website offers detailed guides to creating markets, attracting farmers and more. Membership fees range from \$20 for an associate member, to \$200 for a large market organization. Their members' benefit packages includes: market liability insurance, networking opportunities, statewide publicity campaigns, regional /statewide forums, statewide marketing surveys, and benefits from their advocacy work.

New York City: Health bucks

New York City's Health Department has a "Health Buck" program to increase local fresh fruit and vegetable consumption and support farmers' markets. Public Health offices and community organizations distribute Health Bucks, each valued at \$2, to low income communities. Health Bucks can only be redeemed at farmers' markets. In 2006, over 9,000 Bucks were distributed, of which 40% were redeemed, and in 2007 over 15,000 health bucks are being distributed. Incentives to increase food stamp usage are also included in the program, as anyone spending \$5 in food stamps at a farmers' market receives a \$2 coupon. Currently, 30 markets participate in the program, half of which accept EBT/ food stamps.



Seasonal peppers plums, stone fruit, apples and more.

Recommendations

There are a number of changes that can facilitate the creation of new markets and better support existing ones.

Reduce Fees

Park/Rec Land Use: Park/Rec land usage fees may be prohibitive to new market formation. According to the Farmers' Market Ordinance (o0029-07), in order for a farmers' market to be located on Parks/Rec land, the market must pay a permit fee of \$50 per stall, per day, in addition to Park/Rec staff costs. Because most markets charge farmers only \$20-50 per stall, per day with which they must cover all expenses such as staff, advertising, and permit fees, there would have to be an additional mark-up by this amount above the Park/Rec permit fee to cover these normal operating costs. It is unlikely then, that growers would participate in a market, nor would anyone likely attempt to start a market, with a stall fee ranging from \$70 to \$100. The Park/Rec permit fee should be reconsidered by the BOS to promote new markets on city Park/Rec land..

Health Dept: Many managers interviewed noted that non-agriculture vendors at farmers' market, such as prepared food vendors, drew many additional customers to a market. However, these vendors are difficult to attract because they must pay a \$280 application fee as well as a \$700 health permit fee annually per market attended. The health permit fee could be prorated so that vendors at seasonal markets do not have to pay the entire annual fee. The fee could also be reduced for vendors attending multiple markets, especially in low income areas, to encourage established and popular non-agricultural vendors to attend smaller markets. Another possibility would be to grant first year exemptions to the fee, so that small vendors can attract a loyal following and ensure they will have adequate business to pay the fee.

Increase Funding

One way to increase the number of farmers' market in the city would be to provide start up funding to create markets in interested neighborhoods. Both Fremont and Pleasanton have given \$60,000 to the California Farmers' Market Association to create a market in their cities.

Increase Media/ Advertising

City-wide education efforts regarding health and nutrition should include awareness of farmer's markets as viable alternatives for fresh produce. City-wide advertising and promotion of all markets together would encourage customers to seek out their closest market and encourage demand for markets in new neighborhoods. The hours and locations of all of the city's markets, both those operated by the city and those managed by outside organizations, should be easily accessed from the city's main website or another well known website, in multiple languages, so that those looking for a market in San Francisco can easily access a full list of markets. The website could then be widely distributed on flyers, posters, brochures or banners throughout the city. This campaign could be attached to the EBT/food stamp farmers' market awareness campaign.

Coordination

Permitting - Farmers Market event permits should be better coordinated and streamlined by the various city departments responsible for issuing permits.

Sponsorship - A sponsor could be found that would pay a fee in exchange for the ability to place their logo on market brochures and banners and have stalls at the markets. A sponsorship program like this could provide additional revenue to support the creation of new markets

Market Manager meetings - Periodic meetings to discuss issues and concerns offer an excellent method to improve market collaboration strategies on such issues as general education campaigns and advertising. They also provide an opportunity for managers to form a support group to learn from the challenges and successes of other managers.

Market coordinator - A city funded position of "market coordinator" could be responsible for coordinating markets with other health programs, schools, and food donation programs. A supervisor would facilitate market wide advertising, assist markets in achieving acceptance of EBT/food stamp and other food assistance acceptance, and also be available to local business owners with concerns about a market's impact on their business, residents eager to start a market in their community, or organizations eager to work with the city.

Works Consulted

Personal Communications

All conversations occurred in Summer 2007

San Francisco Market Managers

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Carmichael, Dexter. Center for Urban Education about Sustainable Agriculture, Ferry Plaza Farmers' Market.
Crane, Elizabeth. Noe Valley Farmer's Market.
Gentry, Gary. Alemany Farmers' Market.
Hardy, Denise. Pacific Coast Farmers' Market Association, Kaiser Farmers' Market.
Laurent, Haley. Bayview Farmers' Market.
Nichols, Tom. Pacific Coast Farmers' Market Association, Fillmore Farmers' Market.
Taylor, Jan. California Farmers' Market Association, Parkmerced and Galleria Farmers' Markets.

Other Market Coordinators

Curtis, Chris. Neighborhood Farmers' Market Alliance in Seattle.
Hayden, Gail. California Farmers' Market Association.
Mehta, Sraddha, San Francisco Environment Department.
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