



GardenShare Mobile Farmers Market Feasibility Study Report

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*This report is dedicated to the memory of
Gloria Jean McAdam,
whose leadership, vision and diligence led us down this path of inquiry
to better understand the feasibility of our intent,
as opposed to the folly of our actions.
In true Gloria fashion, she quietly insisted that we start at the start.*

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A C K N O W L E D G M E N T S

First, we would like to acknowledge our grantor, the United States Department of Agriculture (USDA) who provided funding for a Mobile Market Feasibility Study in St. Lawrence County, and made possible the following report. We would also like to specifically thank Theresa (Teri) Davis, USDA Grants Management Specialist, whose guidance and direction has been critical to the study and project as a whole.

GardenShare would also like to acknowledge the following members of the project's Steering Committee, who graciously volunteered their time, expertise and wisdom to help guide our efforts:

Maria Corse, Executive Director
Deep Root Center for Self-Directed Learning
Maria "Flip" Filippi, Local Foods Program Leader and Harvest Kitchen Manager
Cornell Cooperative Extension of St. Lawrence County
Lindsey Pashow, Agriculture Business Development and Marketing Specialist
CCE Harvest New York
Cherie Whitten, Owner/DBA
The Hub and Whitten Family Farm

Much appreciation to Carol Cady, St. Lawrence University GIS Map Specialist and student volunteer, Eliza Gillian who have, and are still, contributing generously to the overall goals of the grant through GIS mapping to help identify how best to aggregate, transport and distribute local food to our low access, low income communities. While their work is not reflected in this report, it will be utilized as we move forward in strategizing to meet the food security needs of St. Lawrence County.

And to the volunteers, too numerous to list here, who helped us identify and arrange survey locations, staff the outreach booths and conduct the community surveys. Thank you — you are what make most things possible in the North Country

Finally, thank you to Aviva Gold and CITEC Business Solutions for their consultation, survey and financial analysis and authoring the following report. Also special thanks to North Country Grown Cooperative, who graciously provided the beautiful photographs on the following pages.

EXECUTIVE SUMMARY



GARDENSHARE'S WORK SUCCESSFULLY SUPPORTING FARMERS MARKETS throughout St. Lawrence County reveals that the large geography and long distances mean that many people cannot access fresh local produce. The high poverty rate in the county results in many households having limited access to transportation to healthy food options. With this backdrop, GardenShare undertook to study the feasibility of a mobile farmers market, a market on wheels, to serve some of the remote and smaller communities in St. Lawrence County, especially those in food deserts.

The study was funded by a USDA FMLPPP grant secured by Gloria McAdam. GardenShare convened a project committee consisting of board and staff, CCE staff, a local farmer and mobile market operator, as well as other local farmers, to choose an appropriate consultant and work plan. The study was carried out by GardenShare AmeriCorps VISTA worker Maggie Smith, GardenShare Associate Director Carlene Doane, GardenShare interns Ella Nielson, and Claire Bartlett. The project was managed by consultant Aviva Gold of CITEC Business Solutions.

Information concerning costs, market interest and logistics was compiled to develop a picture of a Mobile Farmers Market project that encompassed the necessary organizational and community capacity as well as financial feasibility. A pro-forma spreadsheet covering start up costs, operating costs, potential product costs and revenue was developed; a dot survey was performed at various venues throughout the county focusing on US Census Bureau designated high need, low access communities; and product acquisition strategies were evaluated.

While community interest in a mobile farmers market is high, start up costs and operational costs are also high. Earning potential will not cover costs, but other considerations make a Mobile Farmers Market a project that may still warrant careful investigation.

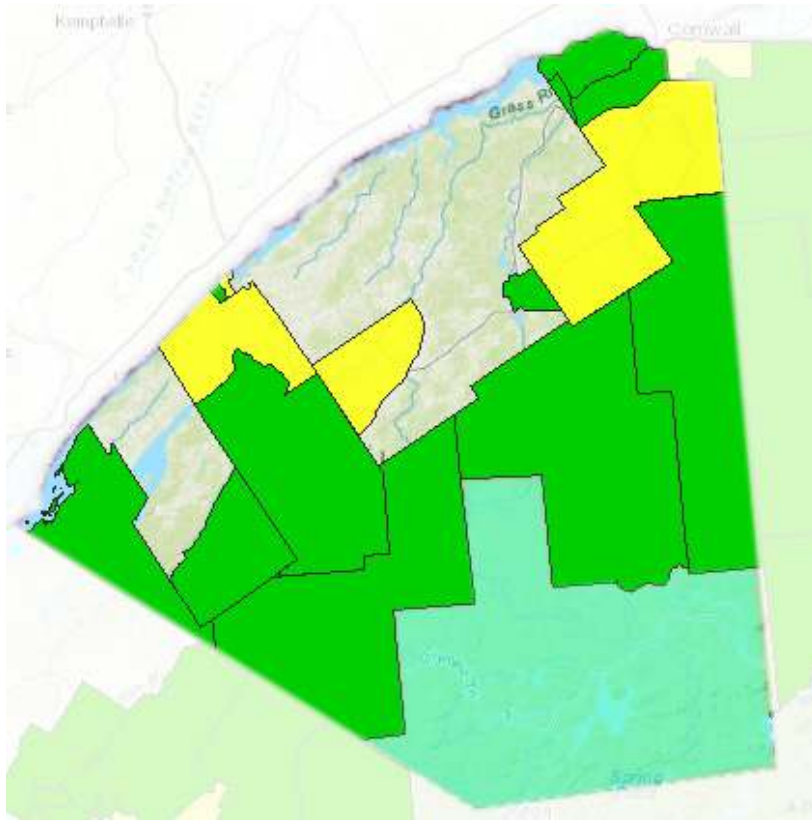
S U R V E Y



THE RESEARCH TEAM CHOSE A DOT SURVEY FORMAT TO ENGAGE people in an active way at expos and other venues where a wide variety of people were attending with time to participate in a study. The study was designed to be engaging enough to offer opportunities for additional input from participants. Venues for the study were chosen by their location in or near low income/low access areas, and event target demographics. Questions covered people's interest in and purchasing of local food, what people purchase at farmers markets, transportation, and whether a mobile market would help raise the level of local, fresh produce in their diet. A full list of the questions is available at this link: <https://preview.tinyurl.com/ybmrbr2>

Low income households in rural areas are a notoriously difficult demographic to survey, and for this particular venture, it was important to try to gain more than cursory information about not only the interest level of potential market, but also ideas about how a mobile farmers market may or may not help them get more fresh, local produce onto their plates.

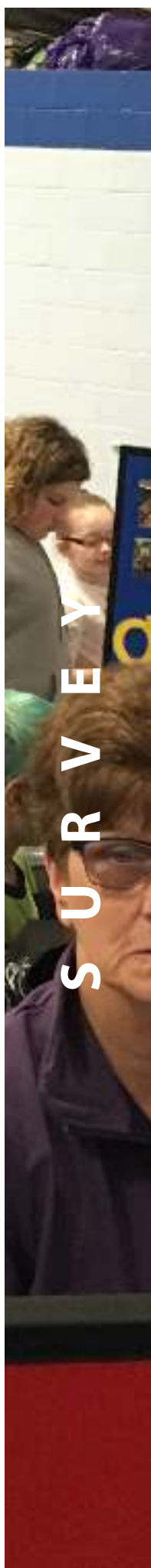
Low income/low access areas in St. Lawrence County were identified using U.S. Census Bureau data. Additional data to the census tract level is available by searching for USDA Food Access Atlas.



- Low Income and Low Access: Low income tract where more than 100 housing units do not have a vehicle and are more than 1/2 mile from a supermarket OR a significant number of residents are more than 20 miles from a supermarket.
- Low Income tract where a significant number or share of residents is more than 10 miles from the nearest supermarket
- Is considered low income but not low access by the US Census Bureau.

Surveys were conducted at the following venues reaching 217 participants whose households represent 651 people:

Ogdensburg	Boys and Girls Club Expo	March 23, 2018 March 24, 2018	Golden Dome/ Ogdensburg HS
Massena	Boys and Girls Club Extravaganza	May 5, 2018	Massena HS
Edwards	Spring Concert	May 9, 2018	Edwards Knox HS
Clifton Fine	Family Health Awareness	June 7, 2018	Clifton-Fine CS
Gouverneur	St. Lawrence County Senior Picnic	July 13, 2018	Gouverneur Civic Center
Colton	Colton Country Days	July 21, 2018	Colton Firehouse
Gouverneur	County Fair	August 1, 2018	County Fair Grounds



The data collected through this survey offered some interesting insights:

While most people buy food at traditional grocery stores, rates of people who spend at least some of their food budget at farmers markets, farm stands, CSAs or from their own garden are high compared to national rates. (See highlighted bars in the graph below.) A 2016 National Consumer Survey by Packaged Facts puts the average at 12 percent. Our study average was above 25 percent for farmers markets alone, and would be even higher but for a 13 percent outlier at the Gouverneur Senior Picnic.

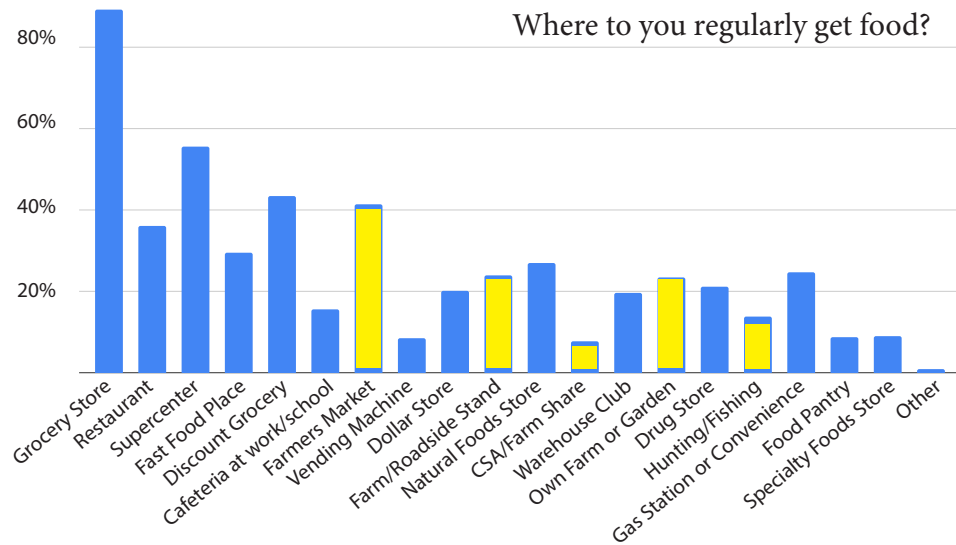
The seniors outlier is interesting; we generally think of seniors as being enthusiastic supporters of farmers markets because of their perceived higher interest in and knowledge about fresh vegetables, but we also know that seniors often have additional barriers to farmers market shopping including transportation and health concerns, which may be partially addressed by a mobile market. Still, the purchase patterns at direct market outlets is high.

Interest is confirmed with high rates (81 percent on average) of people saying they seek out local food when it is available. In addition to direct market access to local food, area survey participants seek out local food at local natural food stores and also their local grocery stores such as IGAs. The definition of local is broad here. Price Chopper, for example, is based in Schenectady, and their definition of local includes their six state service area; NY, CT, NH, VT, MA and PA. Still the data indicate that people demonstrate awareness of local food, and believe they are getting local produce from these outlets.

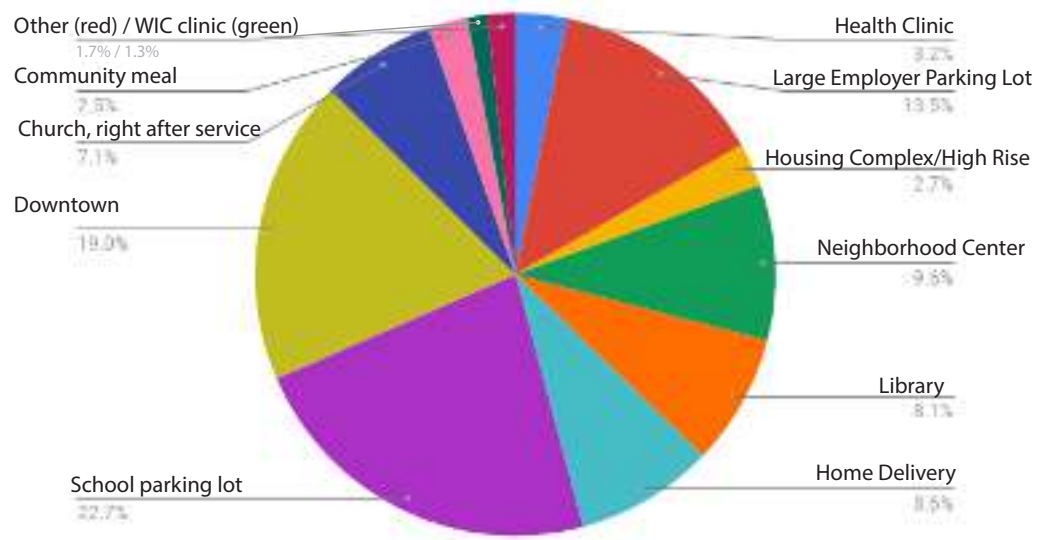
GardenShare and other programs have done a good job of letting people know that food assistance benefits can be used at farmers markets. An average of 78 percent of people surveyed said they were aware that benefits can be used at the markets in St. Lawrence County.

Interest in a mobile farmers market is high with an average of 68 percent saying they would plan on attending weekly if it were at a convenient time and place, although that varies from place to place. That interest, however, is no indication of how many people would actually be accommodated with a convenient time and place, but it does indicate an interest in the concept. School parking lots were the most favored locations overall, which is interesting because no current farmers market in the county operates in a school parking lot. (Downtown locations, which correlate better to current market locations were, however, the number two preferred location.

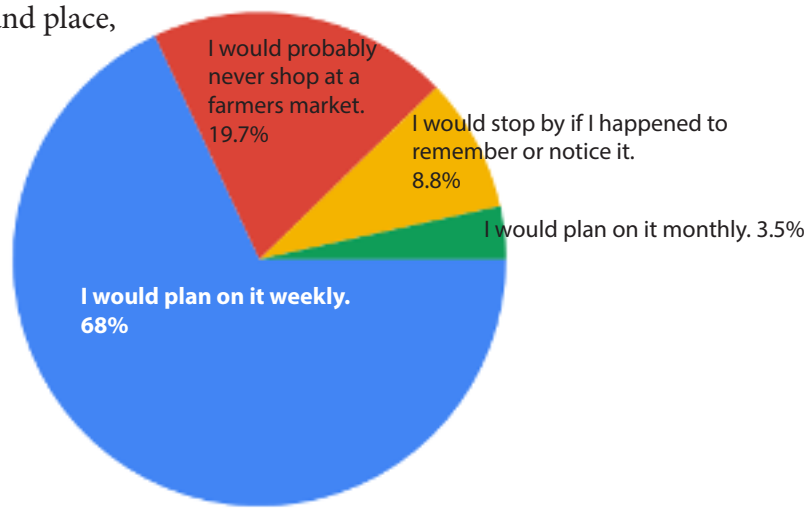
Complete survey data is compiled and is available at this link:
<https://preview.tinyurl.com/ybelts7j>



If there could be a farmers market anywhere, where and when would it be convenient for you?



If there were a farmers market at a convenient time and place, how often would you shop there?



L O G I S T I C S



AMONG THE MAJOR ISSUES IDENTIFIED by the project committee and especially Cherie Whitten, who operates a mobile market of her own in the region, was producer logistics. Other mobile markets who we contacted for this study produced their own product through various programs (although the JCEO market was willing to purchase from a regular wholesaler for early season produce not yet available locally; they also purchased from nearby prison gardens and the St. Lawrence Valley Produce Auction in Bangor). For this reason it seemed to make the most sense to purchase produce from a single source who already aggregates from local producers; for example the Martins' Farmstand, North Country Grown Cooperative, or the St. Lawrence Valley Produce Auction. Other producers or processors interested in participating in the project could negotiate delivery and/or drop off procedures. This would allow vendors to participate in a market without the extensive time commitment required for traditional farmers markets, and achieve the goal of supporting local growers, while alleviating that aspect of project management.

Choosing stops and driving routes to address the needs of the community also poses a significant challenge. The Franklin County Mobile Market engaged with Town Boards and Supervisors to choose appropriate locations and avoid stepping on toes. This was a great way to start out, and routes were changed through the course of the first season to better accommodate the mission.

FINANCIALS



FINANCIAL MODELS ARE, OF COURSE, BEST GUESS ATTEMPTS to determine the costs and potential revenue for a given venture. It is very rare that a business actually follows its original business plan. These are, by nature, working documents that should grow and change, as a business grows and changes, to reflect reality.

The full proforma is available for use at this link: <https://tinyurl.com/y9xa8yd2>

Startup costs for a mobile farmers market could vary widely with the main variable being the vehicle chosen. Our reference for startup costs was Civic Works Real Food Farm Guide to Mobile Farmer's Markets Fall 2016. (A copy is available at this link: <https://tinyurl.com/y8q2rec8>)

Item	Cost	Notes
Vehicle / Van	\$ 15,000.00	Used cargo van; possible too low a low price
Refrigerate and retrofit	\$ 12,000.00	Best guess based on various examples
Wrap	\$ 4,000.00	
Side awnings and shelves	\$ 3,000.00	Additional/outside
Display Hooks, Tablecloths, Scale, Cashbox	\$ 600.00	
POS Device	\$ 500.00	ipad plus square
TOTAL	\$ 35,100.00	

Operating costs excluding product are also estimated. Again, these costs could vary widely depending on many factors. The assumption here is a 6 month program with a full time seasonal employee. Again, Civic Works Real Food Farm Guide to Mobile Farmer's Markets Fall 2016 was used as a reference.

Item	Cost	Notes
Manager	\$ 23,040.00	6 month position; 40 hours/wk; \$20/hr plus 20% fringe
Additional Staff/Ameri-corps/Interns	\$ 15,000.00	
Insurance	\$ 1,800.00	\$150/mo
License	\$ 500.00	Vehicle and permits
Fuel	\$ 3,800.00	500 miles/wk @ 12 mpg \$3.75/gal, 6 mos.
Maintenance	\$ 1,000.00	
Depreciation	\$ 2,000.00	To save toward future vehicle; obviously low
Bags, Quart/Pint Containers	\$ 300.00	
Misc.	\$ 200.00	Receipt paper, pens, cleaning items like mop, bucket soap, compost/recycling bins
Promo material	\$ 800.00	Stickers, flyers, recipe cards, sandwich boards, signs, internal signs, mailings
Total	\$ 48,440.00	

A very broad idea of costs and potential income was gained through the use of a straightforward spreadsheet, which is included in the proforma.

The 50 most popular products from the dot survey were included. Wholesale prices were provided by Daniel Martin for most items and other sellers for additional items not sold by Daniel. An optimistic day for each month June through October was envisioned using the spreadsheet, including wholesale costs, retail costs and conceivable purchases. Cost minus gross sales was calculated to create a season where net totals could come close to meeting operating costs.

Month	Day NET	Month NET	Customer Calculations
June	\$ 428.50	\$ 4,285.00	25 customers per stop; \$~26 each x 2 weeks
July	\$ 668.00	\$10,020.00	35 customers per stop; ~\$28.50 each x 3 weeks (because of holiday)
August	\$ 750.00	\$15,000.00	40 customers/stop; ~\$28 each x 4 weeks
Sept.	\$ 682.00	\$13,640.00	30 customers/stop; ~\$34 each x 4 weeks
October	\$ 447.00	\$ 4,470.00	24 customers/stop; ~\$30 each x 2 weeks
TOTAL		\$47,415.00	

These numbers are wildly optimistic, however and it is unlikely that a mobile market in St. Lawrence County underserved rural areas would meet those numbers. Over time, and with perfect market placement and consistent and fantastic marketing, the customer numbers might be approachable. The dollar values are also high, but with various seasonal incentives, they too might be approached.

A more likely scenario would net about half of that total, around \$23,000. And an even more likely scenario, based on the mobile market startup in Franklin County, would be closer to one quarter of those totals, around \$12,500. One way to increase net would be to have produce donated as JCEO's market does. (See the discussion about JCEO's market below.) This might be a good opportunity to partner with other organizations, for example the UU Church's garden program, but that may not meet organizational objectives.

The spreadsheet at the link (<https://tinyurl.com/y8q2rec8>) offers an easy way to play with product, investment and sales numbers to determine different scenarios.



F I N A N C I A L S



E X A M P L E S



THE JOINT COUNCIL FOR ECONOMIC OPPORTUNITY of Clinton and Franklin Counties, Inc runs a number of programs that provide resources and services to enhance people's dignity and self-reliance. With grant funding from Excellus and through a partnership with the North Country Healthy Heart Network's Creating Healthy Schools and Communities program they were able to start a mobile market for the 2018 season.

Their mobile market made 10 stops per week throughout Franklin County. They sold vegetables grown in their own greenhouses and gardens, bought through the Bangor Produce Auction or from the local prison gardens, or for early season start up, purchased through a commercial vendor. They also had a salad bar on board, which was a very popular set up. They added one seasonal full time employee for the venture. Toward peak season they were grossing about \$1,000/week. Dick Lavigne, who runs the program, considers the mobile market a success.



GREENSGROW MARKET'S MOBILE FARMERS MARKET, BASED IN PHILADELPHIA, launched in 2011 and the website boasts having served more than 15,000 customers, distributed more than 40 tons of fresh produce, put more than \$100,000 back into the local food system, and created three reliable jobs. The original funding for the van came from a Kickstarter campaign along with other



grants and program funding. More than 60 percent of customers reported eating more fruits and vegetables as a direct result of the project.

The current reality of the program is a little bit different, however. The vehicle had a fire, so it operates more as a popup market now, using various trucks or

Subaru Outbacks. At this point, the mobile market caters largely to senior centers and focuses on SFMNP coupons as well as SNAP and other statewide assistance programs. Greensgrow owns all the produce it sells in the pop up markets through its current programs that include a network of farms. The program breaks even financially, but expansion is not something they are thinking about at this time.



WHILE MOBILE FARMERS MARKETS IN URBAN AREAS ARE GAINING TRACTION, rural examples are harder to find. Kiara from Gorge Grown Food Network runs a mobile farmers market in rural Oregon/Washington.

Their market ran sporadically since 2011, then shut down, and was restarted in 2018 with a more organized and intentional focus. They were on the road from May through October with a something like two 2-hour stops on Fridays, a couple of stops in remote places on Saturdays and one on Sundays. They purchased produce from individual local farmers, which was cumbersome and challenging, and they tried to walk that balance between offering low prices for their clients and not wanting to undercut the farmers.

They rang up between ten and 60 transactions at each stop, averaging about \$250 per stop. They did take EBT, FMNP, SFMNP, Veggie Rx, and a double up program. They only did around \$500 in EBT transactions, but sold around \$22,000 all told for the season. They covered their costs not including staff, which was covered by other organizational grants.

They consider it a successful start up year, building relationships and setting ground-work and intend to expand next year. Kiara is working on a toolkit for other interested organizations.



PARTNERSHIPS



IN ADDITION TO FRESH PRODUCE, innovative partnerships would expand the potential market and revenue opportunities of a mobile market. For example, lightly processed produce, perhaps through CCE's Harvest Kitchen, could be sold or used in a salad bar system similar to JCEO's truck. Big Spoon in Potsdam expressed interest in a partnership to increase their footprint outside of Canton and Potsdam. The Potsdam Food Co-op is also considering ways to reach new market throughout the county. Partnering with CSA farmers might help bring CSA to new audiences while bringing extra purchasers to the truck. While a keep-it-simple approach makes the most sense for a start-up, considering growth potential is an important step in decision processes.

C O N C L U S I O N



IT IS CLEAR THAT A MOBILE FARMERS MARKET cannot be a free standing profitable business in St. Lawrence County, especially if the product is being purchased from local producers, but that does not mean it is not a feasible program for a nonprofit organization. Careful consideration of funding possibilities, program time-frame, and organizational commitment and capacity are critical components to a go-no-go decision.



GardenShare is a locally focused nonprofit organization seeking to end hunger and strengthen food security in St. Lawrence County, New York. For more information head to gardenshare.org.

