

Table of Contents

Local Food Supply Chain in the SPC Region	i-1
Introduction to the SPC Region.....	i-1
Physical Features.....	i-1
Regional Forecast.....	i-2
1. Assessing the Local Food Supply Chain in the SPC Region.....	1-1
Why the Interest in Locally Produced Food?.....	1-1
Current Data on Local Food.....	1-2
Local Efforts.....	1-3
Agricultural Sector in the SPC Region.....	1-3
Economic Development Potential of Local Foods.....	1-4
Majors Changes to Food Production: Implementation of the New Food Safety Modernization Act (FSMA).....	1-4
Meeting Regional Priorities in <i>Mapping the Future: The Southwestern PA Plan</i>	1-6
Summary of Findings and Recommendations.....	1-7
Summary of Findings.....	1-7
Barriers.....	1-8
Opportunities.....	1-9
Proposed Goals and Actions.....	1-9
2. Food Production in Southwestern Pennsylvania	2-1
Historical Perspective.....	2-1
Preserving Farmland.....	2-3
Easement Purchase Program.....	2-3
Agricultural Security Areas.....	2-3

The Clean and Green Act.....	2-3
Farms and Agricultural Product Sales in Southwestern Pennsylvania Current Data.....	2-6
Summary.....	2-11
3. Agricultural Production.....	3-1
Allegheny County Profile.....	3-3
Armstrong County Profile.....	3-5
Beaver County Profile.....	3-7
Butler County Profile.....	3-9
Fayette County Profile.....	3-11
Greene County Profile.....	3-13
Indiana County Profile.....	3-15
Lawrence County Profile.....	3-17
Washington County Profile.....	3-19
Westmoreland County Profile.....	3-21
4. The Food Supply Chain in the Regional Economy.....	4-1
Supply Chain Costs Distributed Per Dollar.....	4-2
Supply Chain Business Locations in the Region.....	4-2
Supply Chain Employment in the Region.....	4-4
Key Components of the Local Food Supply Chain.....	4-4
Retail.....	4-4
Distribution.....	4-4
Food Production.....	4-6
Food Manufacturing and Processing.....	4-6

Food Service.....	4-7
Trends in the Food Industry.....	4-7
Beverage Enterprises.....	4-8
Waste Collection and Remediation.....	4-8
The Local Food Value Chain.....	4-8
Distinguishing Features of the Local Food Value Chain.....	4-8
Direct Marketing to End Users.....	4-9
5. SPC Survey Results from Stakeholder Meetings.....	5-1
Barriers Identified in Stakeholder Meetings.....	5-4
Regulations.....	5-4
Immigration Limits.....	5-4
Retirement/Next Generation Interest.....	5-4
Consumer/Public Education.....	5-4
Marketing.....	5-5
Farmers Markets.....	5-5
Other Barriers Identified at Stakeholder Meetings.....	5-5
Summaries of County Meetings.....	5-6
Fayette County.....	5-6
Washington County.....	5-6
Beaver County.....	5-6
Butler County.....	5-7
Armstrong County.....	5-7
Lawrence County.....	5-7

Indiana County.....	5-7
Allegheny County.....	5-8
Westmoreland County.....	5-8
6. Assessing Regional Competitiveness in Food Manufacturing.....	6-1
An Industry Cluster is.....	6-1
What is Cluster Analysis.....	6-1
The Agriculture and Food Processing Cluster.....	6-3
Summary.....	6-3
7. Growing Jobs and Investments.....	7-1
8. Actions Taken Regarding Food Systems Across the Country.....	8-1
Greater Philadelphia.....	8-2
Sysco’s Journey.....	8-2
Central Ohio.....	8-2
West Virginia.....	8-3
Northeast Ohio.....	8-4
Southern Minnesota.....	8-5
Summary.....	8-5