

Market Analysis

MARKET ANALYSIS FOR THE FIRST WARD, CITY OF PATERSON, NJ
BRS, INC

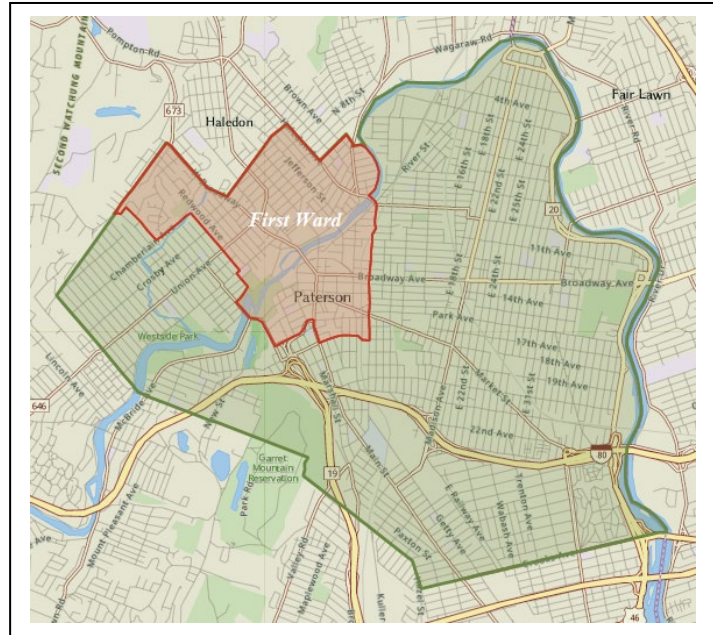
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Executive summary

The City of Paterson, New Jersey is an urban community of about 158,000 people in Passaic County. Paterson's First Ward, located in the northwestern part of the city, has approximately 28,500 residents. It is a diverse, young population living in large households that tend to have more than one family member in the workforce, but median household income is low at \$38,889, and one in three households is enrolled in the Supplemental Nutrition Assistance Program (SNAP, formerly known as food stamps). The population is expected to grow at a rate of 4% in the coming five years, with an increasingly large proportion of Hispanic residents.



The densely populated First Ward has been identified by the New Jersey Economic Development Authority (NJEDA) as a “food desert,” meaning that residents of the area have limited access to nutritious foods. The Ward also qualifies as a food desert under the US Department of Agriculture (USDA) definition for urban areas: at least 33% of the population is greater than half a mile from the nearest supermarket, supercenter, or large grocery store that offers a wide selection of produce, fresh meat and poultry, dairy, dry and packaged foods, and frozen foods. However, this standard definition of an urban food desert is inadequate for the First Ward, where 35% of households do not have access to a vehicle. This limits the means of transportation for a significant portion of the population to walking or public transportation, and so the USDA considers that for low-vehicle-access communities such as the First Ward, the boundary limitation for a “reasonable” distance to a grocery store or supermarket is reduced to one-quarter mile.

Passaic County and its project partners received a New Jersey Economic Development Authority-funded Food Security Planning Grant to carry out a market analysis and development plan that will enable the City of Paterson and the County to transform underutilized land, improve food access, and promote economic development in the First Ward. A target site to be the object of this study was identified on Haledon Avenue between N. Main Street and N. 1st Street, including the vacant lots located between 144 and 158 N. Main Street.

This Market Analysis highlights slowly rising income and strong consumer demand and in the areas within $\frac{1}{4}$ and $\frac{1}{2}$ mile from the target site. Specifically, demand for food consumed at home – i.e., groceries – is expected to increase by 14-15% in the coming five years. However, although there are several small convenience stores and bodegas in the area, there are no large grocery stores or supermarkets. The impact is not only inconvenience for households but also detrimental effects on the health and wellbeing of residents who are not easily able to access fresh, nutritious food.

Because of the inadequacy of current food retailers for the population, we reviewed three possible means of addressing food insecurity in the vicinity of the target site: a large grocery store, a supermarket, and a farmers market. The economic impact of each is analyzed in detail, with a focus on how each one would support local businesses. However, given the large body of evidence suggesting that a creative approach with deep community involvement is often most successful in addressing food insecurity in low-income urban communities, we reviewed a variety of ways communities similar to the First Ward have improved access to healthy food while promoting local economic development – while in many cases at the same time supporting local farmers’ and healthy food entrepreneurs’ expansion and sustainability.

Introduction

The overall goal of this New Jersey Economic Development Authority-funded Food Security Planning Grant project is to carry out a market analysis and development plan that will enable the City of Paterson and the County of Passaic to transform underutilized land, improve food access, and promote economic development in the First Ward.

There are four components to this project:

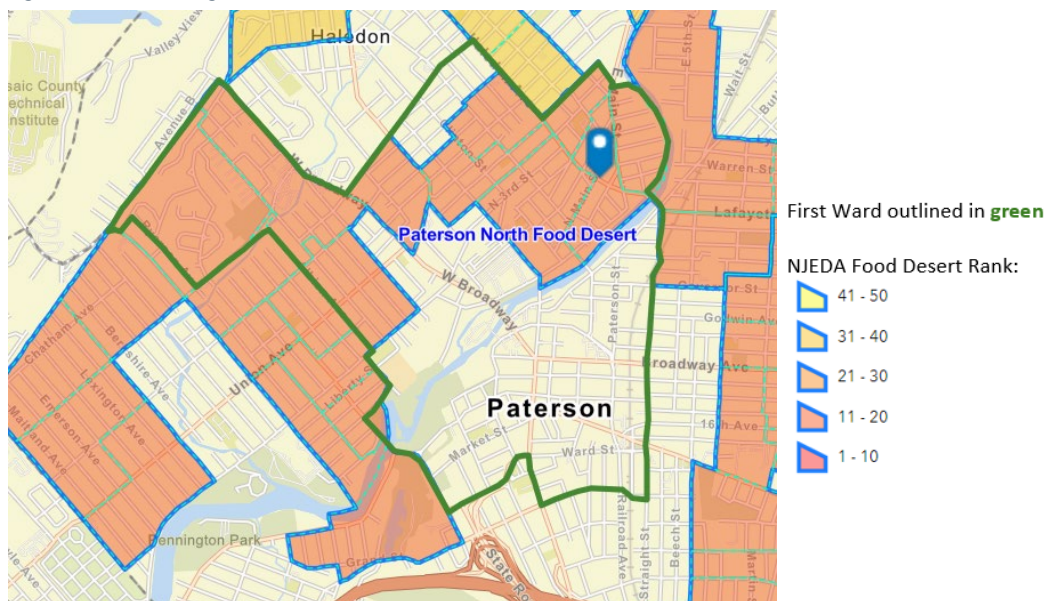
- Market analysis
- Physical site evaluation and recommendations
- Community engagement
- Site development plan and recommendations

The objective of this first component – the Market Analysis – is to assess the need for a supermarket, grocery store, or farmers market within the trade area in as much detail as possible. In order to do this, we will review the area’s socioeconomic profile and household consumption patterns; provide an overview of the area’s existing grocery-related businesses; detail the economic impact of various food retail businesses on the area; and finally, briefly review examples of strategies for mitigating food insecurity that have been successful in other urban, low- and moderate-income communities.

Food desert analysis

The New Jersey Economic Development Authority (NJEDA) identifies part of the First Ward as within the Paterson North Food Desert – one of 50 identified Food Desert Communities in New Jersey – due to residents’ limited access to nutritious foods in the area.

Figure 1: NJEDA-designated Paterson North Food Desert area



Source: NJEDA Food Desert Relief Communities Map layer imported into ArcGIS Community Analyst

Among the 50 communities NJEDA designated as food deserts in 2022 – ranked from #1, which has the highest Food Desert Factor Scores – the Paterson North Food Desert ranks 15th. Determinations are made by the NJEDA on a census block group basis. These designations are based on a wide variety of

variables, including not only geographic proximity to an array of food retailers but also factors affecting the ability to access and afford a variety of fresh, nutritious foods.¹

Food retailers in NJEDA’s designation include conventional supermarkets, limited assortment stores, natural/gourmet food stores, warehouse stores, and wholesale clubs, as well as superstores (such a Walmart) that offer a wide variety of groceries.² Block groups containing or adjacent to major supermarkets of at least 20,000 square feet are not designated as food deserts, even if other types of variables indicate challenges in food access – such as the ability for low-income residents to afford food. Additional factors include demographic, economic, health, and community variables:

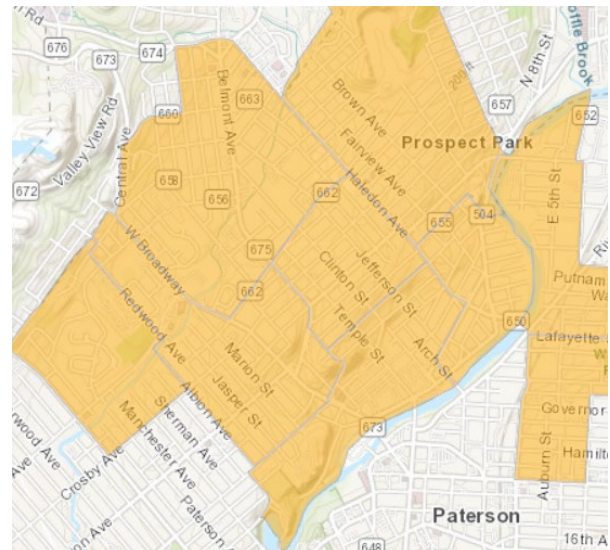
Figure 2: NJEDA Food Desert Factor Components

Demographics	Economic Factors	Health Factors	Community Factors
% of households with a single-mother head	Unemployment rate	% of adults that are obese	% of households with internet access
% non-Hispanic White	Poverty rate	% of adults rating health as poor or fair	% of non-seasonally adjusted vacant housing
% African American	Per capita income		% of households with no vehicle
% Hispanic	% of households receiving public assistance		NJ Department of Community Affairs Walkability Score
% of adults with a high school diploma	% if households receiving SNAP benefits		% of households that are housing-cost burdened
	WIC participation rate		Municipal violent crime rate, 2016-18
	Cost of living difference score		

Source: [New Jersey Food Desert Community Designation Methodology](#)

The US Department of Agriculture’s (USDA) Food Access Research Atlas looks at food access and food deserts in a slightly different way. *Low access to healthy food* is defined as being far from a supermarket, supercenter, or large grocery store that offers a wide variety of healthful food options. Determinations are made by the USDA on a census tract basis, with a census tract considered to have low access if a significant number (or share) of individuals in the tract lives far from a supermarket. More specifically, a *food desert* can be defined as “low-income census tracts where a significant number (at least 500 people) or share (at least 33 percent) of the population is greater than one-half mile from the nearest supermarket, supercenter, or large grocery store.”³

Figure 3: Low income and low access census tracts more than ½ mile from a supermarket (USDA designation)



Source: USDA Food Access Research Atlas, 2019 data

¹ For details on NJEDA’s food desert designations, see [New Jersey Food Desert Community Designation Methodology](#).

² *Measuring Supermarket Access* from [New Jersey Food Desert Community Designation Methodology](#).

³ USDA definition for urban areas. See <https://www.ers.usda.gov/data-products/food-access-research-atlas/documentation/>

Stores meet the USDA definition of a supermarket or large grocery store if they report at least \$2 million in annual sales and contain all the major food departments found in a traditional supermarket, including produce, fresh meat and poultry, dairy, dry and packaged foods, and frozen foods.⁴ According to a recent USDA study⁵, the total number of grocery stores in the US increased between 2015 and 2019. In 2019 40% of the US population lived more than one mile from a food store, and 30% lived within ½ mile of a food store. Senior citizens tended to live more than one mile from a store and working-age adults tended to live within ½ mile. While both urban and low-income residents tended to live within one mile of a store, fewer low-income residents had access to a vehicle.

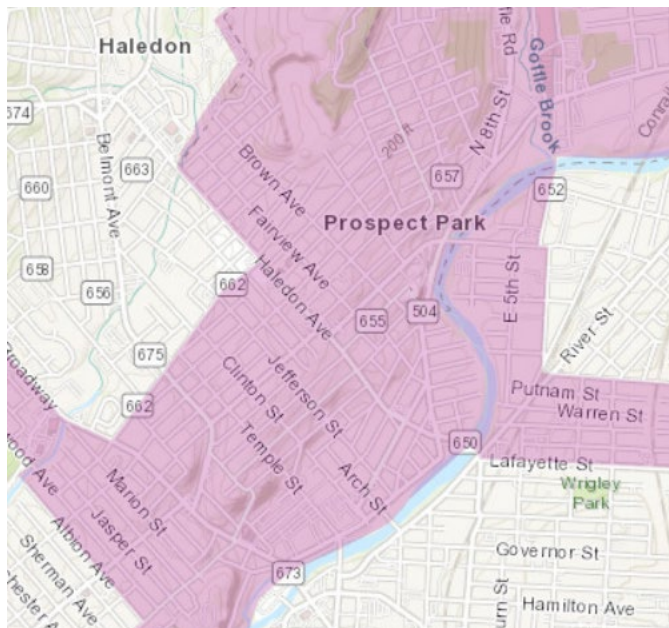
Given that low-income populations are less likely to have access to a vehicle than middle- or high-income populations, the USDA considers that for low vehicle access communities, the boundary limitation for the “reasonable” distance of one-half mile from a supermarket can be reduced to one-quarter mile walking distance. It is important to note that the USDA Food Access Research Atlas specifies that access to supermarkets means supermarkets authorized to accept SNAP (Supplemental Nutrition Assistance Program, formerly known as food stamps) or WIC (Special Supplemental Nutrition Program for Women, Infants, and Children) benefits.

According to the USDA’s [Food Access Research Atlas](#), all of Paterson’s First Ward is a low-income and low-food-access area, meaning that at least 500 people (or at least 33% of the population) are more than a half mile from a supermarket. In fact, the number of low-income, low-access census tracts in the Ward increased between 2015 and 2019.

In addition, the USDA Food Access Research Atlas identifies all five census tracts in the First Ward as having low access to vehicles. In fact, a greater proportion of households do not have access to a vehicle than was the case in 2015.

Because of this combination of factors, this analysis covers not only the one-half mile radius from the target site but also the one-quarter mile walking (or driving) distance.

Figure 4: Census tract population with low access to vehicles

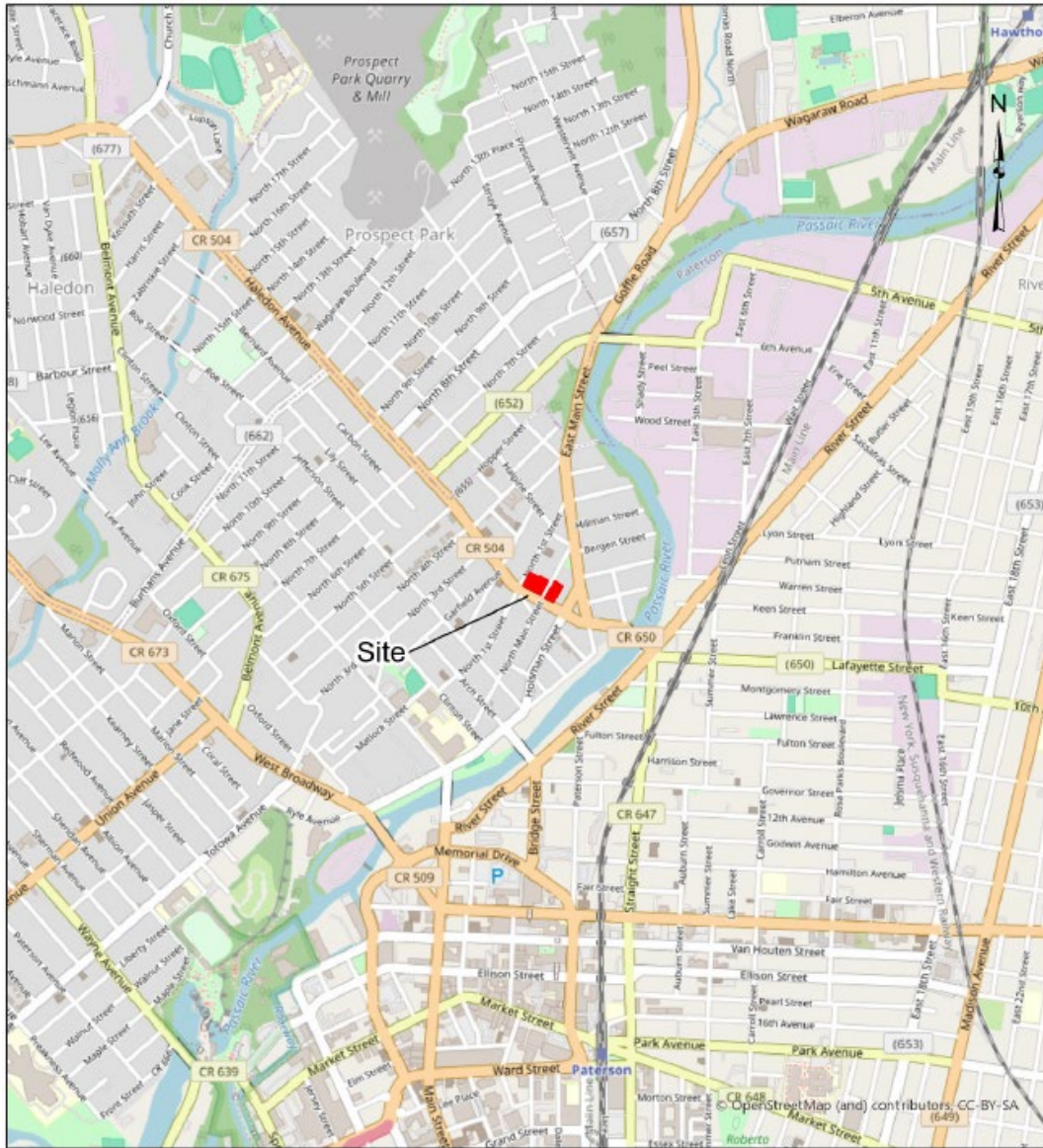


Source: USDA Food Access Research Atlas, 2019 data (most recent available)

⁴ [USDA indicator definitions](#).

⁵ Rhone, A., Williams, R., and Dicken, C. (2022). [Low-Income and Low-Foodstore-Access Census Tracts, 2015–19](#). USDA Economic Research Service. Note that this study only included supercenters, supermarkets, and large grocery stores. It did not include club stores (such as Costco or Sam’s Club), because they are only available to those who pay annual membership fees, or convenience stores, since their offerings vary so widely and because USDA Food and Nutrition Service estimates that 84% of SNAP redemptions were at supermarkets, supercenters, and large grocery stores in 2019.

Figure 6: Target site



Methodology

Demographic and socioeconomic information for the community profile was derived from sources such as the U.S. Census Bureau, U.S. Bureau of Labor Statistics, and U.S. Bureau of Economic Analysis. In order to analyze data on a neighborhood level, we used ESRI's Community Analyst program, which is a web-based tool that combines mapping capabilities with socioeconomic information from a variety of government sources and enables analysis on a hyper-local level. We used another ESRI web-based tool – Business Analyst – to analyze consumption habits, household demand, and existing food retailers in the First Ward. Both of these ESRI applications provide five-year forecasts, as well. ArcGIS was used to create maps of the neighborhood and public transportation network.

In order to assess and compare the economic impact of the establishment of a new grocery store, supermarket, and farmers market, an economic input-output software platform called IMPLAN was

used. IMPLAN combines an extensive set of databases, economic factors, multipliers, and demographic statistics with an input-output modeling system to generate insights into an industry’s contributions on a regional scale, examine the effects of a new or existing business, model the impacts of expected growth or changes, and quantify any other event specific to the economy of a particular region and how it will be impacted. Economic “Input-Output” (I-O) models are estimates of average economic impacts as they affect broad geographic areas, typically on the state or county level, but – as was done to measure impact in this study – can be on the hyper-local level of the zip code area (07522). This is useful when it is important to understand impact at the neighborhood level. The government data pulled into the analysis is regularly updated, along with economic multipliers to simulate the action of the local economy of the geographic area under study and deflators to account for differences due to inflation between the year the data was generated and the year of the analysis.

Other important resources were the USDA’s Economic Research Service and [Food Access Research Atlas](#) and annual US BLS Consumer Expenditure Surveys.

Community profile

Demographic profile

Paterson’s First Ward is a densely populated urban area of approximately 1.4 square miles, located in the northwest area of the city and bordering the Passaic River. In 2021, the total population of the Ward was approximately 28,600 – and growing.⁶ There were 9,448 households in the Ward in 2021, and median household income was just under \$39,000.⁷

Despite the small overall size of the trade area, there are significant demographic variations between the ¼-mile and ½-mile rings around 144-158 North Main St. and the area of the First Ward. Within ¼ mile of the target sites, a greater percentage of the population is non-White, and a greater percentage is of Hispanic ethnicity. Population density is higher than in the surrounding area, and the per capita income is lower. Median household income, however, is higher within ¼ mile (and significantly higher within ½ mile) than the First Ward average.

Table 1: Selected indicators, 2023

	¼-mile radius	½-mile radius	First Ward
Percent non-White	90.1%	53.8%	59.4%
Percent Hispanic ethnicity (any race)	58.6%	49.9%	53.2%
Average size of household	3.23	3.3	2.89
Population density (population/sq. mile)	24,843	19,712	20,542
Median household income	\$41,861	\$49,073	\$38,736
Per capita income	\$17,051	\$19,224	\$19,798

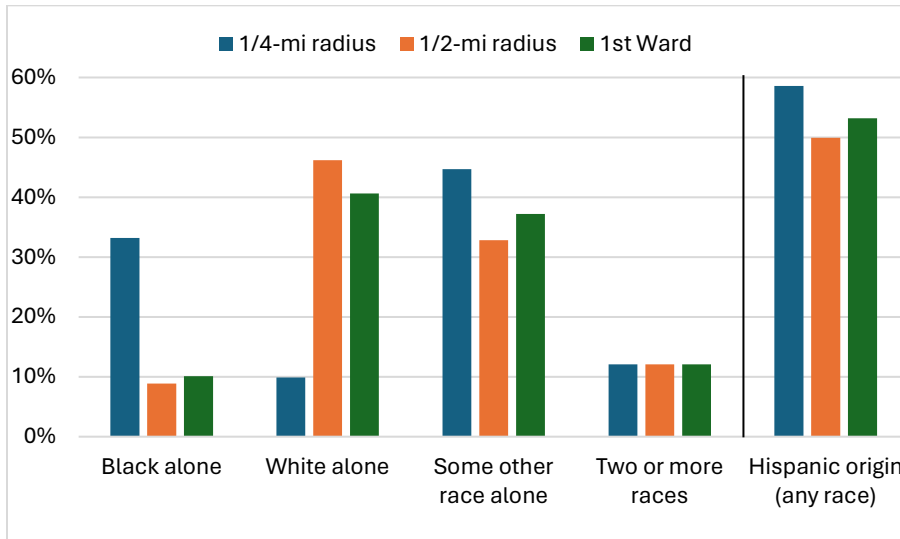
Source: ESRI Community Analyst

⁶ After 2020 Census numbers were released, the City of Paterson began a process of Ward realignment in 2021. There had been significant population growth in the First Ward (and three others) since the last Census, and state law mandates less than 10% deviation between the lowest and highest populated Wards in a municipality in order to maintain balanced political representation. A draft Ward plan was approved in early 2022, reassigning 2,245 people from the First Ward to the Fifth Ward. Because a final realignment plan had not been published by the City as of December 2023, the census tracts used for this report are based on the [City of Paterson 2012 Ward map](#).

⁷ US Census ACS 2021 5-year estimates

Incomes and median age are low across the area of ½ mile from the target sites and the entire Ward, and percentage of the population of Hispanic origin is high, but the very high percentage of people of color (and particularly African American individuals) is notable in the area of ¼ mile.

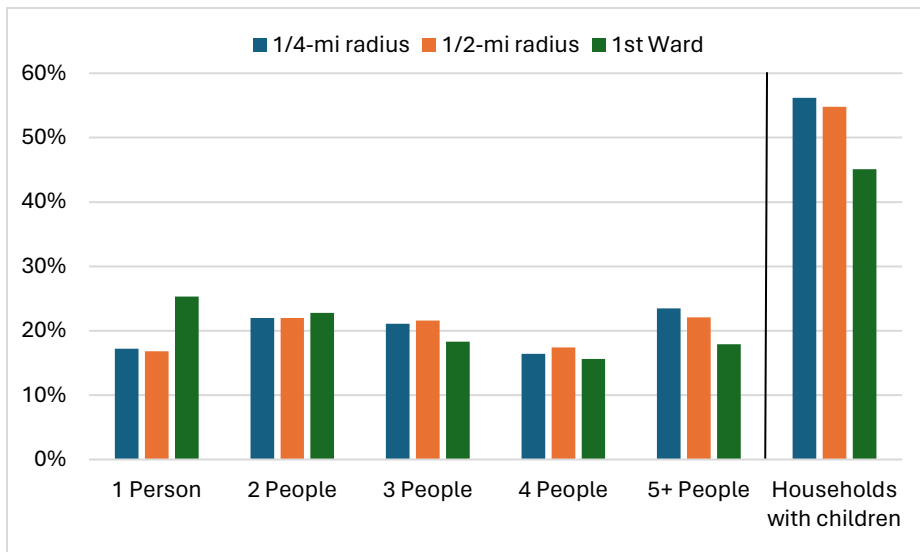
Figure 7: Population by race, 2023



Source: ESRI Community Analyst

The most recent data available (2020) show that households tend to be large, and the majority include children under 18. Of those households with children, 41% in the area of ¼ mile from the target sites are headed by single women, and 36% are in the area of ½ mile.

Figure 8: Households by size, 2020

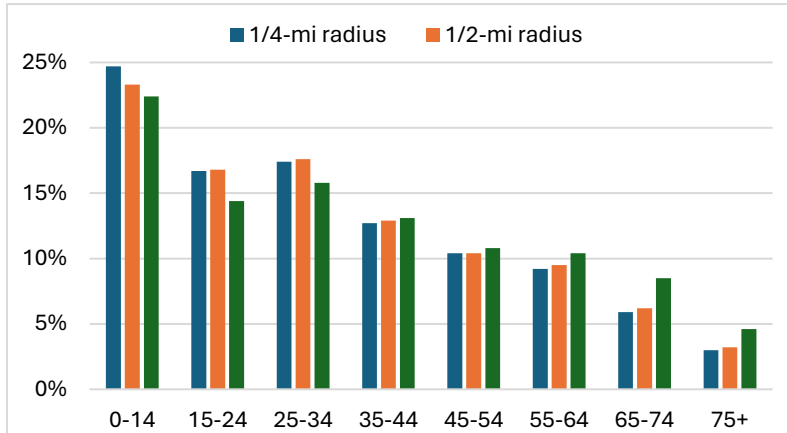


Source: ESRI Community Analyst

The median age in the trade area – 29.4 in the area ¼ mile from the target sites, 30 in the ½ mile area, and 33.2 in the First Ward – is very young compared to the US median of 38.2.⁸

⁸ US Census ACS 2020 5-year estimates.

Figure 9: Population by age, 2023

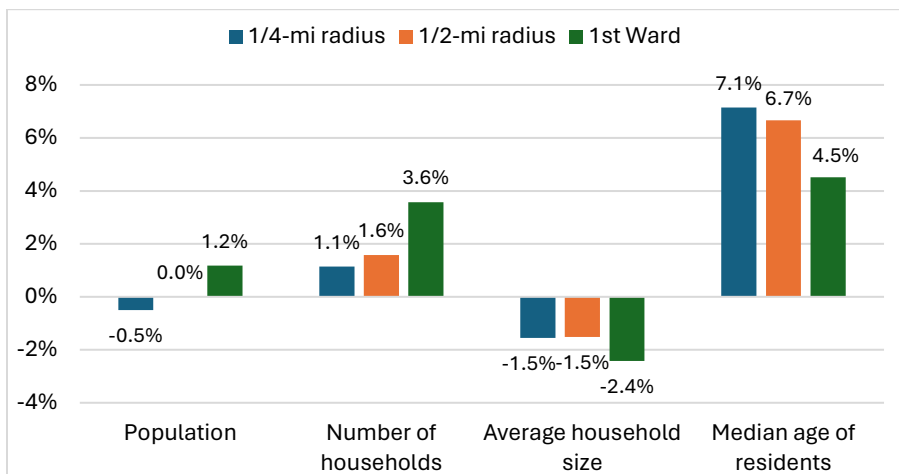


Source: ESRI Community Analyst

45% of the population over five in the First Ward speaks only English, 49% speaks Spanish, and 6% speaks another language. Of those who speak a language other than English, about 37% (or over 5,300 people) speak English “not well” or “not at all.” This translates to about 20% of the overall population over five years of age in the Ward. In the ½- and ¼-mile radius from the target site, the percentage of the population that speaks only English is far higher – between 56% and 60% – and the proportion that does not speak English well or at all is much lower (about 12% of the total population over five).⁹

According to ESRI Community Analyst, population growth is expected to continue over the coming five years in the First Ward. The total number of households will increase by an even greater percentage, leading to a significant decline in the average household size. The population is expected to remain a young one, with the median age rising from 33.2 to 34.7 years by 2028.

Figure 10: Population trends 2023-2028 (forecasted % change)



Source: ESRI Community Analyst

Much less population growth is expected in the area ½-mile from the target site, and in the area within ¼ mile from the site, the population is expected to decline slightly. Like the First Ward overall, the number of households is forecast to rise and the size of those households to shrink. By 2028, ESRI

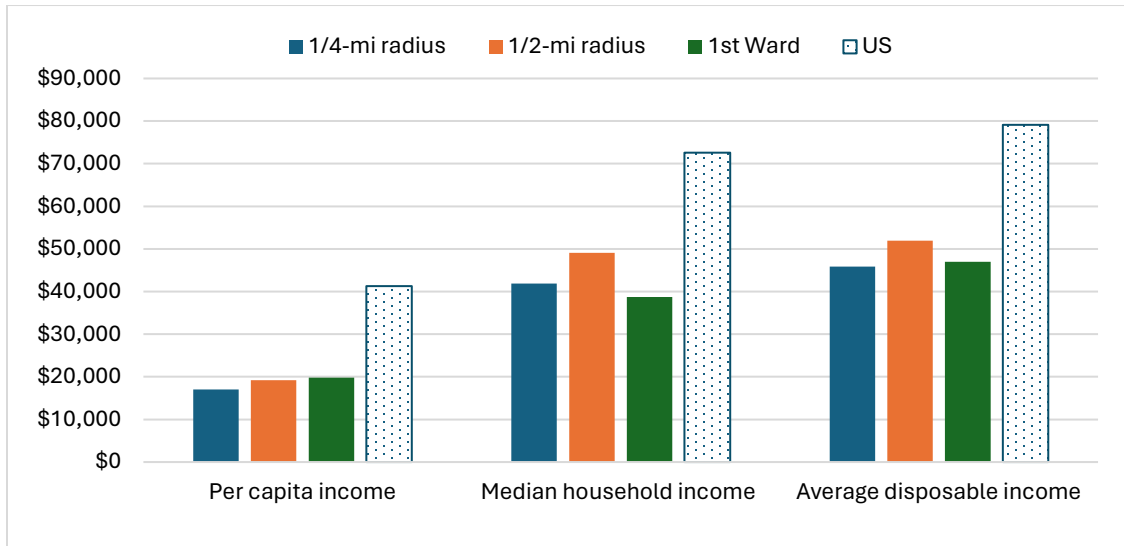
⁹ US Census ACS 2021 5-year estimates and ESRI Community Analyst (2021 dataset).

forecasts a median age of residents of 31.5 years within ¼ mile and 32 within ½ mile – very young compared to the national average.¹⁰

Socioeconomic profile

While incomes are low in the study area compared to the US average, it is interesting that median household income and average disposable income¹¹ are higher within ¼ and ½ mile from the target site than in the First Ward overall. This is a function of their relatively larger household size and suggests that each household has multiple income earners.

Figure 11: Income indicators, 2023



Source: ESRI Community Analyst

Fewer households have income below the federal poverty level in the area closer to the target site than the First Ward, but more households within ¼ and ½ mile receive public assistance and food stamps.

Table 2: Household income indicators, 2021

	¼-mi. radius	½-mi. radius	First Ward
Income below poverty level in past 12 months	29.4%	27.0%	33.4%
Public assistance income in past 12 months	9.9%	8.2%	6.1%
Food stamps/SNAP benefits in past 12 months	49.1%	44.8%	40.9%

Source: ESRI Community Analyst

Paterson’s First Ward has a labor force¹² of 12,227 people and an unemployment rate of 10.1% according to the US Census American Community Survey’s five-year estimates for 2021. About 56.2% of the First Ward’s population aged 16 and over was in the labor force in 2021. This proportion is slightly

¹⁰ ESRI Community Analyst forecasts from December 2023.

¹¹ Average disposable income is after-tax income.

¹² The labor force is those in the civilian noninstitutional population, age 16 years or older, who are employed or who are currently unemployed but actively seeking employment.

lower than the US average of 63.6%. The percentages of the population 16 and over in the workforce within ½ and ¼ mile from the target site are higher than the Ward’s at 59.7% and 57.3%, respectively. Adults between 25 and 54 make up the largest part of the labor force throughout the Ward, and young people aged 16-24 make up the smallest proportion – in line with state and national averages.

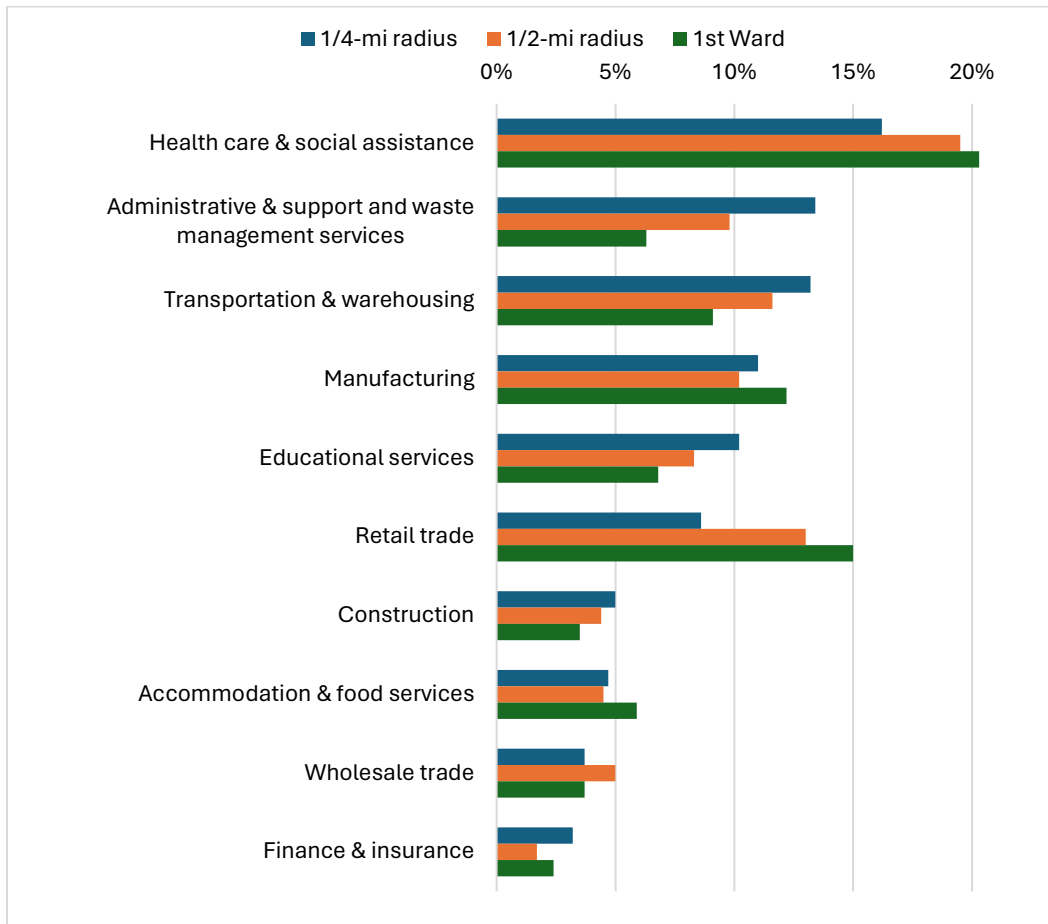
Table 3: Population in the labor force by age and gender, 2021

	¼-mile radius	½-mile radius	First Ward
16+	57%	60%	56%
16-24	37%	49%	54%
25-54	75%	75%	70%
55-64	59%	61%	60%
65+	9%	12%	15%
Male aged 16+	61%	65%	63%
Female aged 16+	54%	55%	50%

Source: US Census ACS 5-year estimates; ESRI Community Analyst

The largest proportion of the First Ward’s labor force works in the healthcare & social assistance sector (20%), and the same is true of the labor force within ½ mile and ¼ mile from the target site. However, while the retail trade and manufacturing sectors have the second and third most employees in the Ward at 15% and 12% respectively, within ½ mile of the target site 13% works in retail trade and 12% in transportation & warehousing. Within ¼ mile, the top employment sectors are healthcare & social assistance (16%), administrative & support and waste management services (13%), and transportation & warehousing (13%).

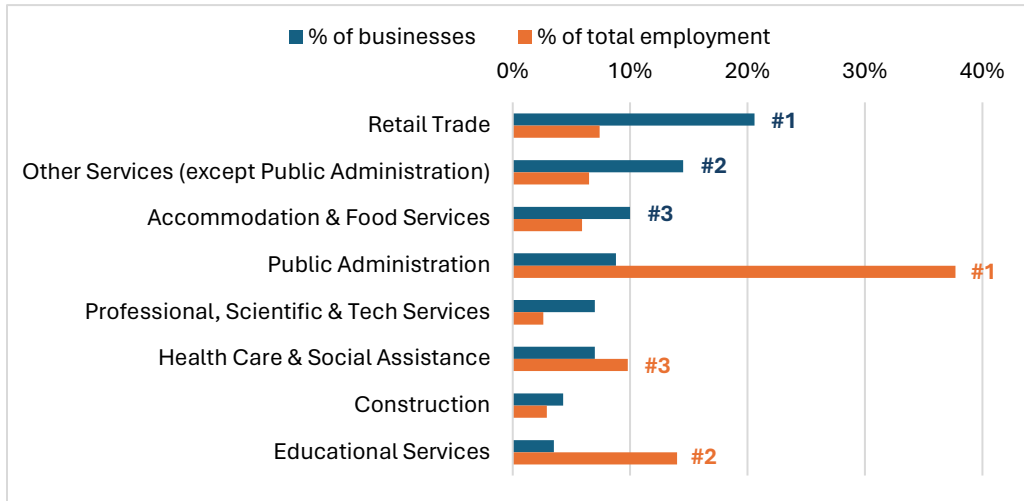
Figure 12: Percentage of labor force employed per industry



Data for top 10 economic sectors by percentage of labor force employed. Source: ESRI Business Analyst 2023

There are an estimated 1,049 businesses in the First Ward¹³, employing 12,628 people. The top sectors in terms of number of businesses are retail trade, other services (not including public administration), and accommodation & food services – with all but one of the businesses in this third sector related to food services. However, retail trade businesses employ only 7% of all workers. The businesses that employ the most people are in the public administration, educational services, and healthcare & social assistance sectors.

Figure 13: Top sectors of business and employment in the First Ward



Source: ESRI Business Analyst 2023 data

Within ½ mile of the target site there were 159 businesses employing 1,622 workers, and within ¼ mile there were 36 businesses employing 368 people. For both areas, the greatest number of businesses is in the other services (except public administration) sector, but in both areas these businesses only employ 10% of workers. Within ¼ mile, educational services businesses are the biggest employer, while within ½ mile, food services – specifically, food services & drinking places¹⁴ – employ the largest percentage.

Top sectors in terms of number of businesses and employment (% of total)

	¼ Mile		½ Mile	
	Businesses	Employment	Businesses	Employment
Other Services (except Public Administration)	31%	10%	26%	10%
Retail Trade	14%	3%	13%	4%
Construction	11%	2%	9%	2%
Educational Services	8%	55%	7%	16%
Health Care & Social Assistance	8%	19%	7%	3%
Accommodation & Food Services	8%	2%	6%	39%

Source: ESRI Business Analyst 2023 data

¹³ ESRI Business Analyst data for 2023.

¹⁴ All of the businesses that fall into the accommodation & food services sector in this area are food services & drinking places. None are accommodation.

Access to transportation

The majority of the labor force throughout the Ward works within Passaic County, but a significant proportion within ¼ and ½ mile works in another county in New Jersey (40% in the ¼-mile radius and 44% in the ½-mile radius). The labor force within a ½-mile radius has the longest average commute at 28 minutes, and those within ¼ mile have the shortest at 25 minutes. Although the limited data available makes it difficult to be precise, only between 0.5% and 4% of the labor force in the area of ¼ mile have a commute of less than five minutes, suggesting that very few both live and work within that area near the target site. This is relevant because it may mean that a significant number of working people have better options for grocery shopping near their places of employment than near where they live.

Within the area immediately surrounding the target site, about 30% of households do not have access to a vehicle. The proportion is slightly lower within ½ mile, but in the First Ward overall, over a third of households do not have access to a vehicle. As a result, a significant number of residents rely on public transportation, taxis, rideshares, or borrowed vehicles for transportation – or go by foot. In the First Ward and within ½ mile of the target site, 30% of employees made their way to work in one of these ways.¹⁵ That number was a little lower in the area of the ¼-mile radius, but in all three areas, only about 9.5% of workers used public transportation to get to their jobs.

Household demand and consumption

Average household expenditures in the area within ¼ miles of the target sites are in total slightly lower than in the surrounding ½ mile and in the First Ward, but the top categories of expenditure are the same throughout the area. About 12% of household expenditures go to purchasing food, and the total amount of \$6,055 in the ¼-mile radius is expected to increase by approximately 14% in the coming five years.

Households within these immediate surroundings of the target site spend an average of \$2,996 per year at grocery and specialty food stores and \$2,140 at restaurants and other eating

Table 4: Average annual household budget expenditures, 2023

	¼-mi radius	½-mi radius	First Ward
Housing & utilities (#1)	\$17,321	\$19,541	\$17,916
Food (#3)	\$6,055	\$6,805	\$6,251
Household operations	\$1,262	\$1,426	\$1,308
Housekeeping supplies	\$494	\$552	\$515
Household furnishings and equipment	\$1,521	\$1,705	\$1,568
Apparel and services	\$1,348	\$1,500	\$1,371
Transportation (#4)	\$5,222	\$5,916	\$5,500
Travel	\$1,072	\$1,224	\$1,115
Health care (#5)	\$3,388	\$3,810	\$3,636
Entertainment and recreation	\$1,875	\$2,115	\$1,949
Personal care products & services	\$517	\$584	\$541
Education	\$1,157	\$1,248	\$1,098
Smoking products	\$253	\$279	\$276
Alcoholic beverages	\$360	\$408	\$373
Shopping club membership fees	\$32	\$37	\$34
Other expenditures (#2)	\$7,207	\$8,127	\$7,392
Total average household expenditures	\$49,085	\$55,276	\$50,845

Source: ESRI Business Analyst 2023 data

¹⁵ Note that lack of reliable transportation is in itself a barrier to finding and keeping work.

places.¹⁶ In addition, households spend about \$2,000 per year at warehouse clubs and supercenters (e.g., Walmart Supercenter) that carry grocery items, although there is no specific breakdown available on how much of this total is spent on groceries.

In the First Ward overall, residents spend on average \$6,251 per year on food – more than residents in the ¼-mile radius but significantly less than those in the ½-mile radius. This amount expected to increase by about 15.3% in the coming five years in the First Ward and by almost 15% in the area of the ½-mile radius.

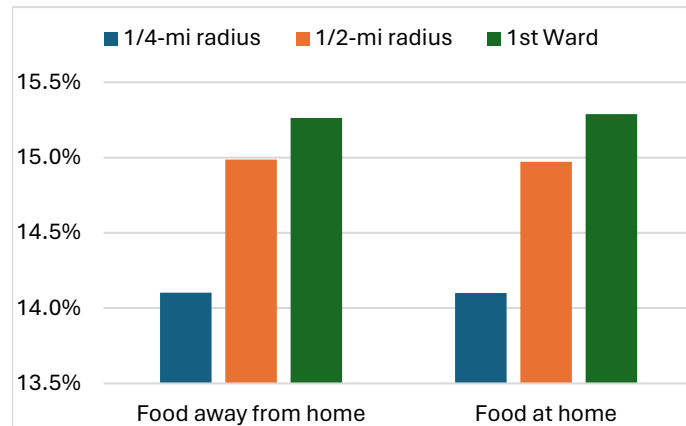
Table 5: Household retail demand: Average amount spent per year by location

	¼-mi radius	½-mi radius	1st Ward
Grocery Stores	\$2,895	\$3,250	\$2,987
Specialty Food Stores	\$101	\$113	\$104
General Merchandise Stores, incl. Warehouse Clubs, Supercenters	\$2,091	\$2,349	\$2,165
Restaurants and Other Eating Places	\$2,140	\$2,430	\$2,223

Source: ESRI Business Analyst

The general category “food at home” is an estimate of the total amount of food purchased from all types of stores for home consumption – as opposed to food consumed at restaurants. A slightly higher percentage of food was consumed at home than outside of the home in 2023 in the ¼-mile radius, although this does not answer whether the reason is a lack of grocery stores in the area. In the coming five years, the increase in food consumed at home – that is, food generally purchased from grocery stores and markets – is forecast to increase by just over 14%. This is a smaller increase than is expected in the ½-mile area and in the First Ward overall.

Figure 14: Forecast consumer demand growth 2023-2028 (% change)



Source: ESRI Business Analyst

Within the category of food consumed at home, the largest proportion for all three areas falls into the general category of “snacks and other food at home,” although it is worth noting that this classification includes items such as baby food and certain prepared foods and salads.¹⁷ Meat, poultry, fish, & eggs is the second-largest category, and fruits & vegetables the third.

¹⁶ Expenditures at grocery and specialty food stores do not include purchases at beer, wine, and liquor stores, which averaged \$104 per year. Expenditures at restaurants and other eating places do not include purchases at drinking places (i.e., bars). Source: ESRI 2023 Consumer Spending databases are derived from the 2019, 2020 and 2021 Consumer Expenditure Surveys.

¹⁷ Snacks and Other Food at Home includes candy, chewing gum, sugar, artificial sweeteners, jam, jelly, preserves, margarine, fats and oils, salad dressing, nondairy cream and milk, peanut butter, frozen prepared food, potato chips and other snacks, nuts, salt, spices, seasonings, olives, pickles, relishes, sauces, gravy, other condiments, soup, prepared salad, prepared dessert, baby food, miscellaneous prepared food, and nonalcoholic beverages.

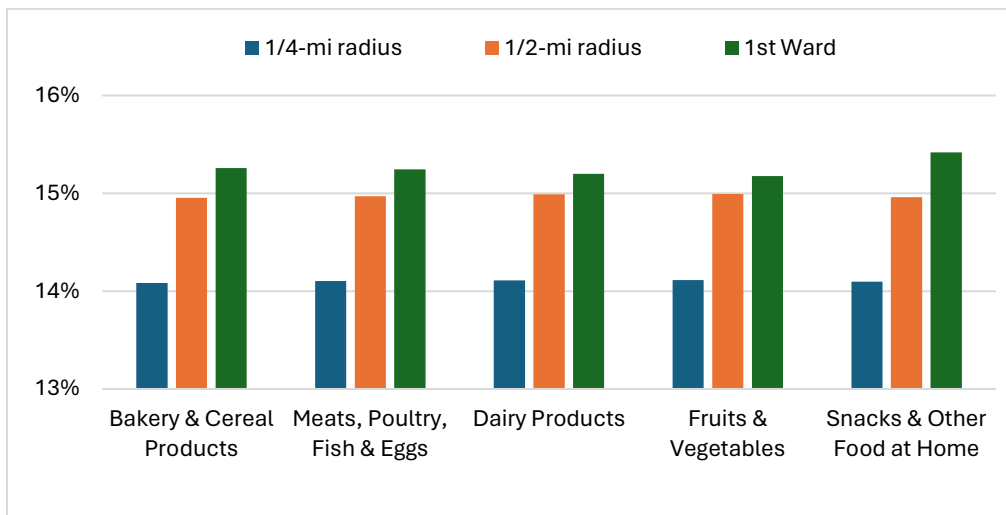
Table 6: Average totals spent by type of food consumed at home

	¼-mi radius	½-mi radius	1st Ward
Bakery and Cereal Products	\$530	\$588	\$540
Meats, Poultry, Fish, and Eggs	\$884	\$990	\$906
Dairy Products	\$389	\$435	\$397
Fruits and Vegetables	\$825	\$923	\$841
Snacks and Other Food at Home	\$1,367	\$1,538	\$1,430

Source: ESRI Business Analyst

Expected growth in expenditures on these foods is expected to be in line with growth for the overall category of food at home in the coming five years.

Figure 15: Forecast demand growth for food consumed at home by category, 2023-2028



Source: ESRI Business Analyst

Within the area nearest to the target sites, households were about as likely to purchase bread, fresh fruit and vegetables, and fresh milk as the US average. They were less likely to buy poultry, but more likely to purchase fish or seafood.

Table 7: Product/Consumer behavior: Households within ¼ mile

In the past 6 months, have you used the following?

	Yes		MPI
	# households	% households	
Bread	980	94%	99
Chicken (Fresh or Frozen)	688	66%	94
Turkey (Fresh or Frozen)	118	11%	76
Fish or Seafood (Fresh or Frozen)	650	62%	103
Fresh Fruit or Vegetables	879	84%	95
Fresh Milk	824	79%	95







Note: The Market Potential Index (MPI) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S.

Source: ESRI Business Analyst

Within the ½-mile radius, food purchase categories were similar. Households were about as likely to purchase most products as the US average, and – like the ¼-mile radius – more likely to purchase fish or seafood.

Table 8: Product/Consumer behavior: Households within ½ mile

In the past 6 months, have you used the following?







	Yes			MPI
	# households	% households		
Bread	2,593	93%		98
Chicken (Fresh or Frozen)	1,866	67%		96
Turkey (Fresh or Frozen)	309	11%		75
Fish or Seafood (Fresh or Frozen)	1,733	62%		103
Fresh Fruit or Vegetables	2,368	85%		96
Fresh Milk	2,196	79%		95

Source: ESRI Business Analyst

In the First Ward overall, households were less likely to buy any kind of poultry or milk, about as likely to buy bread and fresh fruit or vegetables, and more likely to buy fish or seafood.

Table 9: Product/Consumer behavior: Households in the First Ward

In the past 6 months, have you used the following?

	Yes			MPI
	# households	% households		
Bread	9,090	93%		99
Chicken (Fresh or Frozen)	6,360	65%		94
Turkey (Fresh or Frozen)	1,142	12%		79
Fish or Seafood (Fresh or Frozen)	5,967	61%		102
Fresh Fruit or Vegetables	8,193	84%		95
Fresh Milk	7,600	78%		94

In order to see the full picture, it is useful to compare these consumption patterns with those in a similar income category throughout the state of New Jersey. Median household income for the First Ward is \$38,889, corresponding most closely to the second-lowest income category for New Jersey (\$44,864). First Ward residents spend on average 12.3% of total annual expenditures on food, compared to 14.2% for New Jersey residents with a slightly higher household income.

Table 10: Average consumer spending by category, 2nd-lowest household income category, 2019-2020

	New Jersey	First Ward
<i>Expenditures on:</i>		
Food	\$7,571	\$6,251
Food at home	\$5,199	\$4,113
Cereals and bakery products	\$694	\$545
Meats, poultry, fish, and eggs	\$1,207	\$915
Dairy products	\$599	\$401
Fruits & vegetables	\$1,058	\$849
Other food at home	\$1,641	\$1,445
Food away from home	\$2,372	\$2,138

Source: US BLS Consumer Expenditure Surveys (New Jersey) and ESRI (First Ward)

The next section explores existing options for purchasing food in the area – and how well those options fit residents’ consumption habits and demand.

Relevant business summary

Options for fresh food in the trade area and suitability for demand

According to the most recent USDA data available, Passaic County has 243 grocery stores (0.48 stores per 1,000 residents), two supercenters and/or club stores, 65 specialized food stores, 111 convenience stores, and six farmers markets. Most grocery stores and supercenters accept SNAP, and a slightly lower percentage accept WIC, but only half of farmers markets accept SNAP and one third accept WIC. No information is available on the percentage of convenience stores that accept SNAP and/or WIC.¹⁸

Within the First Ward’s retail sector, there are about 40 food and grocery stores, including convenience stores (such as 7 Eleven) and bodegas (see Figure 16). However, the vast majority of these options within the First Ward are small stores (less than 5,000 square feet) with limited or specialized food offerings. In fact, there are only five stores that are larger than 5,000 square feet in the Ward, and none at all within ½ mile of the target site (see Figure 17).

Figure 16: Food and grocery stores by location

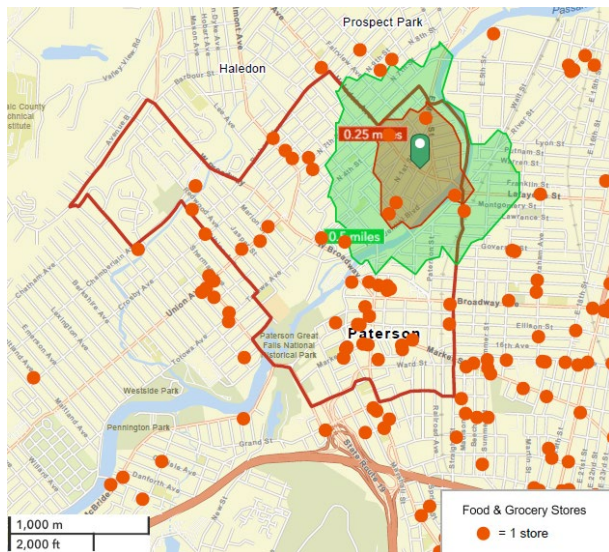
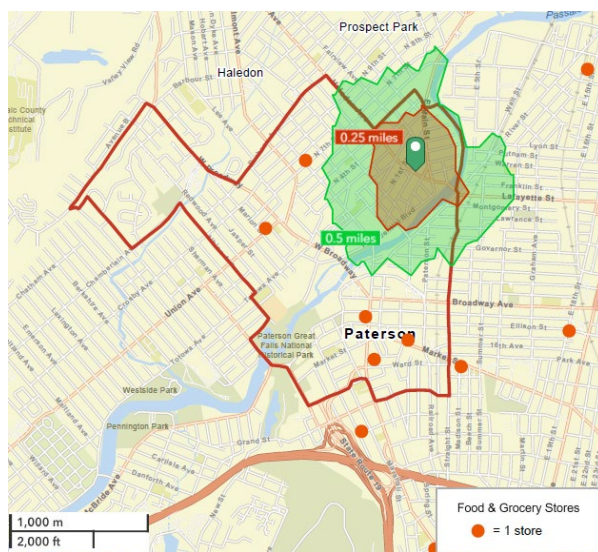


Figure 17: Food and grocery stores at least 5,000 SF in size



Source: ESRI Business Analyst, January 2024

For the 2,729 households (9,179 people as of the 2020 US Census) within the ½-mile radius from the target site, food stores in the area are clearly inadequate. While limited food options are available in small (less than 5,000 square feet) stores in the area, household demand does not align well with these existing options. The second-largest category of purchases for area households is meat, poultry, fish, & eggs, and the third-largest category is fruits & vegetables. Within the ¼ and ½-mile radii from the target site, there is strong demand for fish and seafood in particular; these are not items widely offered in

¹⁸ USDA data from the Economic Research Service’s (ERS) Food Environment Atlas. Data for all types of stores is from 2016, and data for farmers markets is from 2018.

to shop. Generally, they use their own vehicle to travel to the places they shop, although some do use public transportation. As is clear in the map above, there are very few options for public transport in the First Ward, making it difficult for households to depend on city buses to travel to and from food stores.

Grocery store/supermarket structure & requirements

While food retailers come in all sizes, there are certain common elements of grocery store and supermarket operations. In this section we look briefly at what a grocery store or supermarket needs to survive, with an overview of size, sales & profits, and supply chain dynamics.

Size

Grocery stores and supermarkets have been generally increasing in physical size since 1994, when the average was 35,000 square feet (SF). The average size of a US grocery store was about 48,400 SF in 2022 – down slightly from the all-time high of 51,500 SF in 2021.¹⁹ This includes only interior sales space, and additional space is necessary for storage, administration/offices, loading docks, and parking. Multi-floor retailers also need space for elevator bays and stairwells.

The average supermarket carried approximately 31,500 items in 2022.²⁰

Sales and profits

According to the Food Industry Association (FIA), in 2022 average weekly sales per store were \$595,987, and weekly sales per square foot of retail area were \$19.32. The FIA's 2023 US Grocery Shopper Trends report showed that average weekly grocery spending per household was \$155. Although data is not available for independent stores, food retailer chains had a net profit after taxes of 2.3% in 2022, which was significantly higher than 2010 levels (1.1%) but down from the all-time high of 3.0% in 2020. This profit data includes all types of food retailers, but it is important to note that the average size of those food retailers in 2010 was not much smaller than it was in 2022 (2010: 46,000 SF; 2022: 48,400 SF).²¹ Part of the reason for the increase in profits is growth in online sales for brick-and-mortar retailers, which helped grocery stores and some other types of food stores weather the pandemic and other recessions (more easily than, for example, convenience stores), as well as the increase in warehouse clubs and supercenters after 2010. Growth in the number and sales volume of farmers markets also contributed, but it is difficult to be precise because USDA data combines direct sales from farmers with direct sales from manufacturers and wholesalers.²²

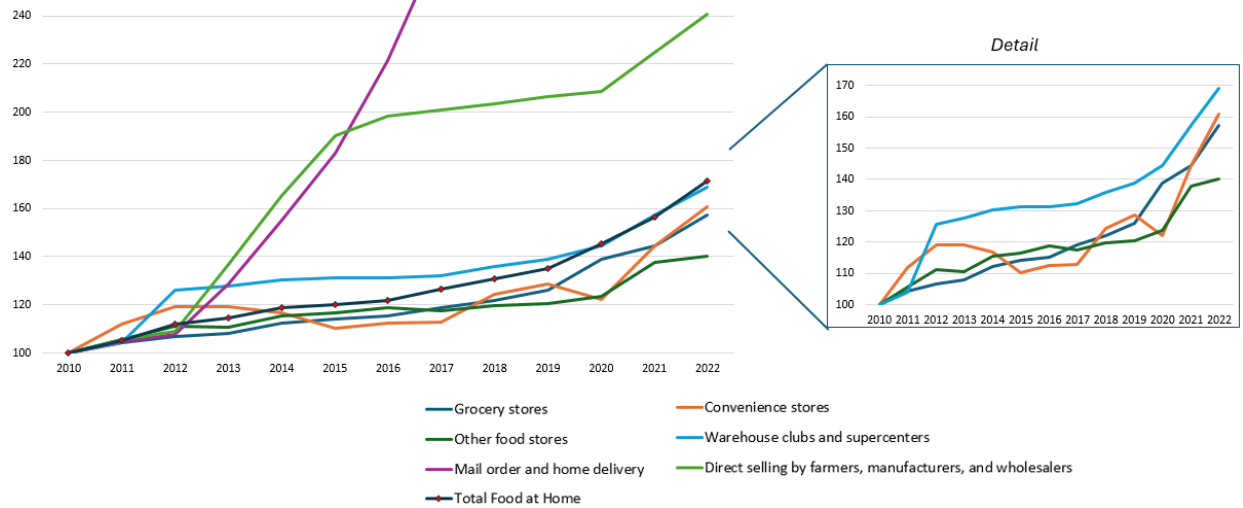
¹⁹ Food Industry Association data (<https://www.fmi.org/our-research/food-industry-facts/average-total-store-size---square-feet>)

²⁰ Food Industry Association data (<https://www.fmi.org/our-research/food-industry-facts>)

²¹ Food Industry Association data (<https://www.fmi.org/our-research/food-industry-facts>)

²² USDA ERS data on nominal food expenditures, 2010-2022

Figure 19: Nominal food expenditures by type of store* (Index: 2010 = 100)



*For all purchasers. Includes taxes and tips.

Notes: The index for "Mail order/home delivery" passed 250 in 2017 and rose to 531 by 2022. "Other food stores" includes establishments such as small health food and specialty stores, and "Direct selling by farmers, manufacturers, and wholesalers" includes (but is not limited to) farmers markets.

Source: USDA ERS

These slim profit margins for grocery stores took place against a backdrop of sales that were increasing in dollar terms but decreasing as a percentage of total food sales. In 2022, food purchased for consumption at home (i.e., groceries) made up 44% of total food sales. This is a decrease from 2010 levels, when expenditures were split evenly between food consumed at home and food consumed outside the home (e.g., in restaurants).²³ It is important to remember that for grocery stores (like all retailers) sales and profit are dramatically different numbers. While the average overall markup for individual products is 34.8%, the share for the retailer for each dollar of sales for domestically produced goods is only 12.4 cents. The remainder goes to paying for industry costs such as operations, processing, packaging, and transportation, among other cost categories, as shown in the USDA Economic Research Service diagram below.²⁴

Figure 20: Industry costs per food dollar, 2022



Note: "Other" category is comprised of agribusiness and legal & accounting costs.

Source: USDA ERS [Food Dollar Series, 2022](https://www.ers.usda.gov/data-products/food-dollar-series/)

²³ Total sales by all purchasers at grocery stores, convenience stores, other food stores, warehouse clubs & supercenters, other stores & food service, mail order/home delivery, direct selling by farmers, manufacturers, & wholesalers, and home production & donations. USDA Economic Research Service, [Food Expenditure Series 2010 and 2022](https://www.ers.usda.gov/data-products/food-expenditure-series-2010-and-2022/).

²⁴ USDA ERS Food Dollar Series, 2022. <https://www.ers.usda.gov/data-products/food-dollar-series/>

Supply chain

No matter the size of a grocery store or supermarket, the structure of the store's relationships with suppliers is key to pricing and profitability – and therefore to sustainability. In 2018 the Food Industry Management Program of the Charles H. Dyson School of Applied Economics and Management at Cornell University reviewed case studies of 11 food retailers and their supply chains in low-income urban and rural areas of the US Northeast.²⁵ Ten of the 11 were supermarkets according to the US Census definition (business establishments “primarily engaged in retailing a general line of food, such as canned and frozen foods; fresh fruits and vegetables; and fresh and prepared meats, fish, and poultry”²⁶), and one was a large convenience store that carried produce, fresh meats, dairy products, and frozen foods. The supermarkets ranged from limited-assortment retailers, to discount grocers offering food on “closeout”, to standard supermarkets. Ten of the 11 stores were smaller than the average American supermarket in terms of total square feet. All 11 of the stores were independently owned.

These smaller, independently owned stores actually did better than the average US supermarket in weekly sales per square foot and weekly sales per full-time employee, and this combination of store characteristics made findings from the case study interesting and relevant to this project. Being small and independently owned has both advantages and disadvantages for a food retailer in a low-income community:

Advantages

- Most of the stores studied were able to tailor their product offerings to their consumer base, sourcing supplies from smaller distributors that offered specialty, diet-specific, ethnic, or culturally relevant foods.
- Sourcing directly from local farms and producers was also technically possible, although only one store studied did so. This was rare because of the economics of the supply side, which dictate that transportation costs are either divided among multiple stores in one area (cheaper for shoppers but requiring collaboration) or that those costs are passed directly on to consumers (simpler for the store but more expensive for shoppers).

Disadvantages

- Independently owned stores do not often have the means to own their own distribution centers and must therefore rely on large grocery wholesalers. Two of the stores reviewed were licensed under contracts with large chain store companies and therefore had very little choice in products or suppliers. In these cases, the parent company also dictated store layout and operations, further limiting proprietors' ability to tailor the retailer to local consumer preferences. However, other stores found ways to customize offerings without increasing costs: one joined a retail cooperative of independent stores that buys directly from food manufacturers, and another purchased deeply discounted products such as overstock and almost-expired foods.

²⁵ Park, K., Gómez, M., Clancy, K. (2018). *Case Studies of Supermarkets and Food Supply Chains in Low-Income Areas of the Northeast: A Cross Case Comparison of 11 Case Studies*. <https://agsci.psu.edu/research/food-security/publications/supply-chain-case-studies/cross-case-comparison-of-11-case-studies>

²⁶ US Census Bureau. Industry Statistics Portal. [NAICS definition](#). Both grocery stores and supermarkets fit this definition, with supermarkets generally being understood to be the larger of these food retailers.

- The small sizes of these stores (compared to the national average, and certainly compared to supercenters and club stores) affect operations costs such as food transportation to the store. Delivery of a smaller volume of goods from a wholesaler results in higher per-unit costs. Two stores opted to keep temperature-controlled storage/warehousing space (either on site or nearby) that allowed them to purchase in greater quantities and less frequently – and at lower unit costs – from a variety of wholesalers and “distribute” to their own store(s) over time. (Note that the case study examined cost savings with this strategy but not how product freshness was impacted.) The convenience store proprietor had a longstanding relationship with a local farmer who delivered fresh produce along an established route that included several area retailers, thus reducing transportation costs for each individual store.

The study noted that the distance each type of food travels to reach a retailer impacts pricing to consumers, with milk traveling the shortest distance and fresh produce the longest.

IMPLAN analysis

Economic impact

As an economic “input-output” modeling program, IMPLAN requires that at least one impact (or known quantity) be entered into the model to generate output estimations. For this analysis, the impact entered was industry output for the category “Retail – Food and Beverage Stores.” All types of grocery stores (including supermarkets) as well as farmers markets fall into this category,²⁷ and this presents a challenge: while it is possible to distinguish the impact of a large grocery store from that of a supermarket based on their average annual sales because they are the same type of business in two distinct sizes, IMPLAN does not distinguish between a grocery store (of any size) and a farmers market. They all fall into the category “Retail – Food and Beverage Stores.” The problem is that farmers markets are a very different type of business and therefore impact the local economy differently. For example, there would be much more impact expected to local farmers from a farmers market, and it is also possible that a variety of local artisans would benefit, depending on the types of businesses that rent stalls. Analysis of “Retail – Food and Beverage Stores” assumes smaller impact to local businesses in general than would be accurate for a farmers market, and employment estimates would also be inaccurate based on the very different types of independent sellers at a market compared to employees of a standard grocery store. Lastly, farmers markets generally only operate one or two days a week, and often only seasonally. This last difference, however, can be addressed effectively in IMPLAN by assigning accurate total sales and industry output values.

Because of these issues, this market analysis will consider IMPLAN results for farmers markets in less detail than for grocery stores and supermarkets, noting additional potential impacts drawn from other research.

²⁷ IMPLAN consolidates the 21,855 individual six-digit (i.e., level of highest specificity) 2022 NAICS codes for all types of business into 546 more generalized categories for the purpose of analysis. This is the reason that grocery stores, supermarkets, and farmers markets are all considered the same type of business.

Type of business	Total sales	Markup %	Retail margin \$	Wholesale purchases	Industry output
Large grocery store ²⁸	\$2,000,000	34.79%	\$695,800	\$1,304,200	\$691,786
Supermarket ²⁹	\$14,000,000	34.79%	\$4,870,600	\$9,129,400	\$4,842,501
Farmers market ³⁰	\$1,000,000	40%	\$400,000	\$0	N/A

Note that the markup includes not only profits but also transportation and building lease costs – or in the case of a farmers market, costs to lease the land on markets days plus the costs businesses pay to rent a stall. In reality, there is a lot more variation in the markups charged at farmers markets than at grocery stores, with stalls charging anything between 15% and 100% (or more) as markup for their products.³¹ However, liability costs (e.g., insurance) that are part of the markup for grocery stores are not necessarily part of farmers markets’ costs.

The results of an input-output analysis are broken down into direct, indirect, and induced effects. **Direct effects** refer to the initial change to the local economy in this analysis. IMPLAN then generates additional effects that occur because of this initial change. **Indirect effects** refer to the business-to-business purchases in the supply chain and depend on the industry selected (in this case, “Retail – Food and Beverage Stores”). Some examples for this industry are wholesalers, truck transportation, real estate, and legal services. **Induced effects** stem from household spending of labor income. A simple example would be when employees of a grocery store buy lunch at a deli near their place of work, pay for daycare, use the bank, or pay their rent. When enough workers continue to spend their money (i.e., their labor income) at businesses near the work site, those businesses in turn might decide to hire more workers. This would be induced employment that is hired in non-food-retailer industries.

Large grocery store: Economic impact

IMPLAN analysis shows that a new grocery store with \$2 million in sales in the First Ward would create seven new jobs related to the store itself (direct impact) and a small portion of one real estate job related to a lease for a non-residential building (indirect impact). The very small induced employment impact (less than a hundredth of a job) is related to non-restaurant food and drinking places such as cafeterias and food trucks – perhaps meals purchased by grocery store employees during their shifts.

Direct labor income of \$317,545 refers to both employee compensation (\$260,964) and store proprietor income (\$56,581). Indirect labor income of \$610 accrues to real estate agents, employees of non-restaurant food and drinking places, and a variety of local businesses supplying services such as trash collection, auto repair, and truck transportation. Induced labor income of \$104 goes to employees of businesses such as nursing & community care facilities, restaurants, car washes, auto repair shops, and banks.

While output is equal to the gross retail margin for a store, value added is a measure of the value of the services the store provides. It does not include the value of the items purchased to stock the store. In this case, the value the grocery store adds is to offer items for sale, organized on shelves in a store that

²⁸ Based on the USDA definition of annual sales of \$2 million. No specific square footage is noted in this definition.

²⁹ Average size of 45,000 square feet and total annual sales of \$14 million (USDA definition).

³⁰ Based on annual sales of \$1 million. Farmers’ Markets America and Barney & Worth, Inc. 2008. “Characteristics of Successful Farmers Markets: Portland Farmers Markets/Direct-Market Economic Analysis.”

³¹ A. Pinto, A. Torres. 2017. “What You Need to Know about Selling in Farmers Markets. Part 2: Pricing.” Purdue Extension, Horticulture Business.

is convenient to customers.³² This added value is then used to pay for employee compensation, proprietor income, and taxes, with some remainder for profit. Value added is similar to an industry’s contribution to GDP. A large grocery store in the First Ward would generate an estimated \$443,622 in value added for the economy of the area of zip code 07522.

Table 11: Economic impact summary

	Employment	Labor Income	Value Added	Output
Direct Impact	7	\$317,545	\$443,622	\$688,695
Indirect Impact	0.01	\$610	\$1,145	\$2,599
Induced Impact	0	\$104	\$363	\$493
Total Impact	7.01	\$318,258	\$445,129	\$691,786

Note: All amounts are annual totals.

Source: IMPLAN analysis

Establishment of a large grocery store in the First Ward would be most likely to benefit the local economy by increasing output (impact output) in the industries listed below. Aside from the first category – which shows the most significant new output because it includes the grocery store itself – the increases are fairly small. However, they do not take into account intangible economic benefits such as the value of redeveloping vacant or distressed land into a productive community asset, which can in turn increase surrounding property values and attract more businesses to the area.

Table 12: Industries by Estimated Growth Percentage (top 10)

Industry	Industry Total Output	Impact Output
Retail - Food and beverage stores	\$4,079,910	\$688,701
Other real estate (non-residential leases)	\$112,483,321	\$1,936
Owner-occupied dwellings	\$131,228,849	\$227
Car washes	\$22,464,494	\$126
Non-restaurant food & drinking places	\$16,580,815	\$125
Truck transportation	\$11,087,470	\$102
Tenant-occupied housing	\$34,745,390	\$61
Waste management & remediation services	\$7,952,914	\$56
Support activities for transportation	\$11,280,993	\$44
Automotive repair & maintenance	\$4,796,631	\$31

Note: All amounts are annual totals. The values listed for Owner-occupied Dwellings refer to wealth created by homeownership (not to mortgage payments).

Source: IMPLAN analysis

One last component of economic impact is the taxes paid as a result of the establishment of a new business. Like employment and output, this impact is made up of direct, indirect, and induced amounts.

Table 13: Tax impacts

Impact	Sub County General	Sub County Special Districts	County	State	Federal	Total
Direct	\$13,258	\$12,168	\$6,914	\$25,023	\$48,588	\$105,951
Indirect	\$27	\$25	\$14	\$63	\$103	\$233

³² Value added does not include intermediate inputs such as rent, electricity, or heating costs.

Induced	\$12	\$11	\$6	\$25	\$22	\$75
	\$13,297	\$12,204	\$6,934	\$25,112	\$48,713	\$106,259

Note: All amounts are annual totals.

Source: IMPLAN analysis

Supermarket: Economic Impact

Because a supermarket is by definition much bigger than a large grocery store and has much higher sales, the economic impact will also be greater, though it will follow a very similar pattern in terms of where in the local economy that impact will be felt.

Direct employment (for the supermarket itself) is close to 50 new positions. Indirect employment is once again a portion of one real estate job related to a lease for a non-residential building, though in this case a larger portion of that job than was the case for a grocery store. Induced employment – still very small at one one-hundredth of a job – is in non-restaurant food and drinking places such as cafes and food trucks.

Direct labor income includes \$1,826,747 in employee compensation and \$396,067 in store proprietor income. Indirect labor income of \$4,268 accrues to real estate agents, employees of non-restaurant food and drinking places, and a variety of local businesses supplying services such as trash collection, auto repair, and truck transportation. Induced labor income of \$726 is likely to go to employees of local services, nursing & community care facilities, outpatient care centers, restaurants, religious organizations, auto repair shops, banks, and retail stores.

A supermarket in the First Ward would generate an estimated \$3,105,353 in new value added through its operation.

Table 14: Economic impact summary

Impact	Employment	Labor Income	Value Added	Output
Direct	48.98	\$2,222,814	\$3,105,353	\$4,820,863
Indirect	0.1	\$4,268	\$8,013	\$18,190
Induced	0.01	\$726	\$2,539	\$3,449
Total	49.09	\$2,227,809	\$3,115,906	\$4,842,501

Note: All amounts are annual totals.

Source: IMPLAN analysis

The establishment of a supermarket in the First Ward would be most likely to benefit the local economy by increasing output in the industries listed below. Aside from the first category (which includes the supermarket itself) the highest output increases accrue to non-residential real estate, homeowner costs, non-restaurant food & drinking places, local services, truck transportation, and residential tenant costs. As in the case of a new grocery store, there would be local impacts that the analysis does not reveal. Wherever in the Ward new supermarket is sited would tend to stimulate the local economy, making the immediate surroundings a significantly more attractive place for other types of businesses to locate.

Table 15: Industries by Estimated Growth Percentage (top 10)

Industry	Industry Total Output	Impact Output
Retail - Food & beverage stores	\$4,079,910	\$4,820,905

Other real estate (non-residential leases)	\$112,483,321	\$13,550
Owner-occupied dwellings (i.e., mortgages)	\$131,228,849	\$1,590
Car washes	\$22,464,494	\$880
Non-restaurant food & drinking places	\$16,580,815	\$872
Truck transportation	\$11,087,470	\$711
Tenant-occupied housing	\$34,745,390	\$426
Waste management & remediation services	\$7,952,914	\$391
Support activities for transportation	\$11,280,993	\$309

Note: All amounts are annual totals.

Source: IMPLAN analysis

Finally, the likely tax impacts are the following:

Table 16: Tax results

Impact	Sub County General	Sub County Special Districts	County	State	Federal	Total
Direct	\$92,808	\$85,177	\$48,399	\$175,162	\$340,113	\$741,658
Indirect	\$190	\$175	\$99	\$443	\$723	\$1,630
Induced	\$81	\$74	\$42	\$176	\$154	\$527
Total	\$93,079	\$85,426	\$48,540	\$175,781	\$340,990	\$743,816

Note: All amounts are annual totals.

Source: IMPLAN analysis

Farmers Market: Economic impact

Because of the challenges in analyzing the economic impact of farmers markets in IMPLAN noted above, this section approaches measurement differently, and impact is discussed in broader strokes and with a more nuanced interpretation than was the case for a grocery store or supermarket. Supermarkets are just large grocery stores, but farmers markets are not just outdoor grocery stores, because they have an entirely different business model and have to be approached differently in terms of economic impact.³³

Because it is important to understand how establishment of a farmers market – which is almost by definition related to local production – would impact local producers, the region of IMPLAN analysis was broadened to the entire county.³⁴ The impact detailed below assumes a small percentage of sales will be of food produced hyper-locally – i.e., in the First Ward – but a much greater percentage will be produced by individuals and on farms in the wider area of the county. Clearly not all products will be grown in the county, but a certain percentage can be assumed to be. The analysis below is intended to serve as a general desktop analysis; more precise estimations would require a full farmers market feasibility analysis.

³³ For the purpose of IMPLAN analysis, the output of a farmers market assigned as the “input value” is based on producer prices rather than purchaser prices (the latter is the basis of output for grocery stores).

³⁴ There is in fact commercial cheese and snack food production in the First Ward, but factory-made products are not generally offered at farmers markets. It is more likely that produce from residents’ gardens would be sold at a farmers market, but because these are not “commercial” products, they do not register in IMPLAN, which pulls data from governmental and specifically tax records.

Lastly, note that the economic impact of a farmers market *cannot* be directly compared with that of a grocery store or supermarket because these analyses cover impact in different regions. The analysis for the grocery store and supermarket was designed to measure impact within the First Ward, but because none of the food was produced in the Ward, there was a notable lack of impact to farms and food producers. There was not even a notable impact to food wholesalers, because those companies are not located in the First Ward. The objective of the analysis in that case was to understand how siting this type of food retailer at the target site would impact a) the employees and proprietor of the store directly, and b) surrounding households and businesses indirectly.

A seasonal farmers market open two days a week between May 1 and November 30 and sited on land totaling just over one acre is assumed to accrue gross annual sales of approximately \$1 million.³⁵ This estimated sales number is on the very low end on a national scale and depends on the number of vendors and product mix. Most farmers markets build success over a period of several years, so year-one sales would likely be significantly lower.

The IMPLAN analysis highlighted below takes into account several important differences between food sales in a store and food sales at a farmers market. The primary difference is that there is no wholesale activity involved: vendors produce the food themselves rather than purchasing food from a third party. In addition, the product mix offered at a farmers market tends to be mainly fresh, locally produced fruit, vegetables, meats/poultry, eggs, and baked goods, rather than the processed and pre-packaged foods sold in stores. Again, a full feasibility analysis would be necessary to produce definitive estimates, but for the purpose of this study, the mix of products produced and sold that was specified in the IMPLAN analysis is shown in the box on the right. Because no exact amounts of each product type sold at the farmers market are known, this distribution is based on the overall sales figure of the individual products from current output levels for Passaic County.

Vegetables and melons	25%
Fruit	20%
Greenhouse products (all)	20%
Poultry and eggs	12%
Other animal products (e.g., lamb, goat)	4%
Fish	5%
Cheese	2%
Bread and bakery products	7%
Other snack foods	3%
	100%

There are other important differences between the business model of a grocery store or supermarket and that of a farmers market. The food sold at markets is also generally produced, processed, and transported within the same region, which may limit variety but also results in more money remaining in the local economy. Real estate fees are far lower: there are fees for use of the market site to be paid by the market proprietor or management (costs which are in turn passed on to vendors), but these are far lower than the building lease a store would pay. Transportation costs are borne by individual vendors,

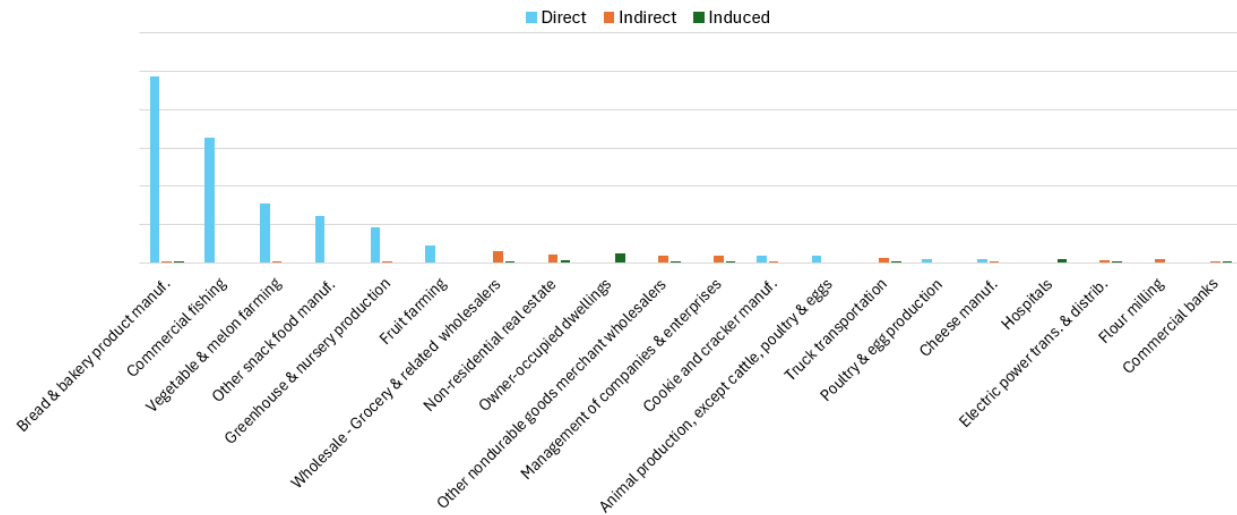
³⁵ Number of market days per week and seasonal months based on New Jersey farmers market averages. Total sales estimates based on: Farmers' Markets America and Barney & Worth, Inc. 2008. "Characteristics of Successful Farmers Markets: Portland Farmers Markets/Direct-Market Economic Analysis." And: H. Petersen. 2022. "Farmers Markets of Minneapolis: 2021 Metrics." Dept of Applied Economics, U of M-Twin Cities.

The first source was chosen because it provided specific sales figures for markets across the US, and the second was chosen because it focused on a city with a large proportion of low-income and minority households, and most of the local farmers markets reviewed accept SNAP and have an additional government-sponsored "Market Bucks" program to support low-income families' purchases of fresh produce.

so there is generally very little economic impact to trucking transportation companies. Warehousing and storage costs are not generally applicable, either.

IMPLAN estimates the following shares of direct, indirect, and induced impact:

Figure 21: Impact output



Source: IMPLAN analysis

All of the direct impact to output is in the sectors that produced the items being sold at the farmers market, while indirect and induced impacts are mainly related to market management and the top sectors where food producers would be expected to spend their earnings, such as transportation, mortgage payments, and banks. New direct, indirect, and induced jobs created would fall into similar categories.

What IMPLAN might not be capturing particularly well is the extent to which farmers markets bring business to neighboring stores and communities where a market is located, or the fact that money spent at markets specializing in local products tends to remain within the local community, preserving and creating local jobs. In addition, farmers markets provide opportunities for small farmers and vendors to sell their products and grow new businesses without the added costs of shipping, storage, or inventory control. And IMPLAN does not capture any of the income generated by non-commercial items such as vegetables from household gardens that are sold at the market.

No tax analysis is included here, because although the proprietors of farmers markets do pay taxes on behalf of the organization (based on vendor payments, for example, but not on food sales), the bulk of relevant taxes are paid by individual vendors based on their own sales.³⁶

³⁶ In addition, an individual vendor generally sells at more than one farmers market (or other outlet), and taxes paid per farmers market are not calculated separately from the total.

Studies on means of mitigating food deserts

Often a creative, multifaceted approach is necessary to address access to nutritious food in low-income, under-resourced communities, particularly if no land (or investment) is available for a supermarket. Start-up costs are high, land that is attractive to investors may be scarce, and the profit margins of grocery stores tend to be very low. These challenges are magnified in low-income urban neighborhoods. Over the past decade, many urban areas have seen a decline in the number of medium-sized to large groceries, while the number of supercenters, and club stores in suburban areas has increased. These “mega-stores” have the advantage of customer volume and (non-food) product offerings with higher margins, which makes them better able to make a profit.

Below we discuss a variety of food retail models that address access to healthy food and promote equitable community development – while in many cases at the same time supporting local farmers’ and healthy food entrepreneurs’ expansion and sustainability.

Non-traditional grocery store models

There are a variety of non-traditional models that have been successful in low-income, under-resourced communities – from independent stores accessing grants and tax incentives to public-private ventures. Because grocery stores tend to have very low profit margins, often a traditional financing model for a store in a low-income community does not succeed.

Vicente’s Tropical Supermarket in Brockton, MA is an example of an independent operator accessing grant funding through the state-funded Massachusetts Food Trust Program (MFTP). Vicente’s offers nutritious, affordable, and culturally appropriate ethnic food that is a direct response to local residents’ stated food preferences. Public engagement to achieve this fit has been largely informal, because the proprietors are part of the large immigrant population they serve. The store also offers healthful prepared foods, and customers who spend more than \$100 are eligible for free Uber and Lyft rides. Grant funding and a low-interest loan from MFTP allowed Vicente’s to renovate their original store and expand the fresh produce sections. The store’s approach to its local clientele – along with the MFTP-funded upgrade – has been so successful that Vicente’s has opened a second location in the neighborhood. The two locations have created local living-wage jobs and stimulated economic development in the neighborhood.³⁷

A similar MFTP-funded grant provided support for the Stop and Compare Market to complete renovations and an expansion of the fresh produce sections in its two locations in densely, majority-minority Boston neighborhoods. The stores provide a wide selection of culturally appropriate foods and prioritize hiring workers who are from the immigrant populations that make up the clientele. In addition to this informal community engagement, the management conducts customer surveys to ensure that the products offered meet demand and collaborates with local Latino associations.³⁸

MFTP has established other programs that complement their financing support for improving access to healthful food by establishing a hydroponic greenhouse and a Farm and Community Collaborative. The Wellspring Harvest greenhouse – built on a reclaimed brownfield site – creates jobs for low-income residents and provides fresh, healthy food to local grocery stores, schools, and hospitals. Organized as a

³⁷ <https://massfoodtrustprogram.org/funded-projects/2019/6/3/vicentes-tropical-grocery>

³⁸ <https://massfoodtrustprogram.org/funded-projects/2019/7/12/stop-and-compare-market>

worker cooperative, Wellspring employees share in company profits. MFTP has supported Wellspring through a \$15,000 loan and a \$15,000 grant and is the largest urban greenhouse in Massachusetts. The Farm and Community Collaborative provides linkages between local farms and youth, offering paid apprenticeships for urban youth to learn about sustainable agriculture and the local food system. The focus is on understanding how small local farms can help mitigate urban food insecurity and lack of access to nutritious food, while at the same time supporting agricultural entrepreneurship. The Collaborative was awarded a \$20,000 grant from MFTP to support their work.³⁹

There is also federal funding and public-private support available to retailers prioritizing access to healthful food in urban areas. With investments through the Healthy Food Financing Initiative (HFFI), USDA partners with the Reinvestment Fund to support establishment and expansion of grocery stores and other healthy food retailers to underserved urban, rural, and tribal communities. Market Seven LLC received funding to establish a community marketplace offering food products from a wide variety of Black-owned businesses in Washington D.C.'s Ward 7. HFFI funds are being used to build a community food hall that will provide a grocery store and prepared options to the neighborhood as an alternative to local fast-food offerings. The marketplace also incorporates a food production and education space for entrepreneurs and community members.⁴⁰

Similar public-private lending programs offer support for the establishment (and retention) of nutritious food retailers in underserved areas, such as the Michigan Good Food Fund, the Pennsylvania Fresh Food Financing Initiative, and the Kansas Healthy Food Initiative.⁴¹ Many of these programs offer coordination with nutrition incentives programs such as SNAP Incentives and a variety of supplemental support for produce purchases.

One final non-traditional model is a non-profit grocery store. Good Grocer in Minneapolis, MN stocks fresh, zero-waste produce and standard grocery items for a mainly immigrant, low-income customer base, with a price point somewhere between a food bank and a standard food retailer. Founded by a faith community, Good Grocer is fully staffed by volunteers (who receive a 20% discount for a minimal time commitment), but members of the public can also shop for full price, which – along with donations – enables the store to offer half prices for people experiencing food insecurity.⁴²

Healthy bodega/corner store initiatives

In communities with a large number of independently owned bodegas and corner stores, there is a legitimate concern that establishment of a grocery store or supermarket would drive these small businesses out. Corner stores and bodegas offer convenience to residents (particularly those who do not own cars) but very often do not offer fresh or nutritious foods.

The Los Angeles Food Policy Council's Healthy Neighborhood Market Network (HNMN) works with small markets and corner stores – independently owned by low- to middle-income families who are often immigrants and people of color – to stay in business *and* increase fresh produce offerings. Each year, HNMN offers 20-30 corner store owners intensive business and leadership training, mentorship, and technical assistance to help them transform their stores into healthy food businesses. Technical

³⁹ <https://massfoodtrustprogram.org/funded-projects/2019/6/3/farm-and-community-collaborative>

⁴⁰ <https://www.rd.usda.gov/newsroom/news-release/usda-partners-reinvestment-fund-invest-226-million-increase-equitable-access-healthy-foods-across>

⁴¹ <https://migooodfoodfund.org/>; <https://thefoodtrust.org/what-we-do/hffi/pa/>; and <https://kansashealthyfood.org/>

⁴² <https://goodgrocer.storebyweb.com/s/1000-1/>

assistance includes marketing, branding, store design and merchandising, pricing and profitability, and sourcing options. And the program has been successful: a large majority of store proprietors surveyed said they had seen an increase in healthy food sales after participating in the program. The support does not end there, either. HNMN offers a network of resource providers to provide customized services to store owners – from connections to local farms, to healthcare professionals who carry out medical screenings in-store, to nutrition workshops and cooking demonstrations on-site to drive demand for new healthful products.⁴³

One potential hurdle can be connecting these small stores to SNAP and WIC programs, and HNMN provides support through neighborhood-based organizations to address this challenge. In the area where HNMN works, the USDA launched a pilot fruit and vegetable voucher program for SNAP participants to use at a one corner store. The USDA-funded program provided \$15-\$50 extra dollars each month to SNAP customers to purchase fruits and vegetables from that store, which is a neighborhood market that (in collaboration with HNMN) had broadened its offerings from primarily beer and tobacco products to include fresh produce in an upgraded setting. The pilot was a success, with residents benefitting from increased neighborhood access to nutritious food, and the store experiencing an expanded customer base. By the sixth month of the program, produce had become the second-highest-grossing product category at the store.⁴⁴

The New York City Department of Health and Mental Hygiene’s Healthy Bodegas Initiative also sought to preserve these small businesses in low-income minority neighborhoods in Harlem, South Bronx, and Central Brooklyn with a two-pronged approach: its program staff worked with neighborhood corner stores and bodegas to increase the availability of healthier foods, and also with community organizations and residents to increase demand for these foods. The program’s goal was to increase the availability, variety, and quality of fresh, healthy foods in the local bodegas that were convenient to residents and to educate and empower communities to demand healthier food options in their local retail settings. Starting with two campaigns, “Mooove to 1% Milk” and “Move to Fruits and Vegetables,” the program incentivized local corner bodegas to push 1% milk in lieu of whole milk, and to encourage purchase of fruits and vegetables. Incentives were passed on to customers as discounts in the initial phases of the program, and bi-lingual educational flyers informed shoppers about the program’s objectives. The program was successful, with many bodegas stocking products they had not before – and seeing increasing demand for them.⁴⁵ It is noteworthy that the choice to encourage bodegas to stock milk, vegetables, and fruit was a result of community outreach and surveys on resident demand, and similar efforts in other communities might point toward other food options such as fish, nutritious prepared foods, or locally produced bread.

In “Bringing Incentives to Corner Stores” (2022), a Philadelphia-based non-profit called The Food Trust provides several examples of nutrition incentive programs that are designed to benefit the health of community members while supporting sales in small neighborhood stores. For example, “buy one get one free” produce coupons or discounts to shoppers using SNAP benefits, earned at the point of purchase, can be supported by grant funding to store proprietors, and have the advantage of focusing

⁴³ Los Angeles Food Policy Council. 2017. “Case Study: Increasing Equitable Food Access through the Healthy Neighborhood Market Network.”

⁴⁴ Fox, Hayley. “After Three Decades, This Westlake Corner Store Continues to Reinvent Itself.” *LA Weekly*, 1 November 2017. And Los Angeles Food Policy Council. 2017. “Case Study: Increasing Equitable Food Access through the Healthy Neighborhood Market Network.”

⁴⁵ “New York City Healthy Bodegas Initiative: 2010 Report.” New York City Department of Health & Mental Hygiene, Center for Economic Opportunity.

health benefit on low-income households. “Produce Prescriptions” is another type of program funded through partnerships with local medical institutions. Healthcare professionals write fruit and vegetable “prescriptions” to eligible patients who are either experiencing food insecurity or have dietary illnesses such as Type 2 diabetes, and these prescriptions function as vouchers that can be redeemed at participating local bodegas and corner stores.⁴⁶

Food Co-Ops

There are many examples of successful cooperatively run food stores, a model that has been in existence since the 18th century. Modern food co-ops are generally community owned and community centered, and unlike corporate grocery chains, they are independent and owned by the customers who shop there. Membership is open to all, and profits are usually reinvested into the store. Members choose which products the store stocks and which suppliers to use. Often this means stronger relationships to local farms and producers, which helps to concentrate economic benefits in the local area.

There are recent studies that point to the strength and sustainability it gives a food retailer to be community centered and customer owned. In 2019, researchers looked at all supermarkets that had plans to open in food deserts since 2000, and what happened. There were 71 supermarkets that met the criteria, of which 21 were driven by government efforts, 18 by community leaders, 12 by non-profits, 12 by a collaboration between government and communities, and eight by commercial interests. As of 2019, a third of the stores developed by government entities had closed their doors (or never had gotten past the planning stage), and half of the commercial stores had gone out of business. Of the government-community collaborative projects, almost half had also closed or never made it off the ground. However, of the 30 community and non-profit driven stores, 21 still remained open. What most interested the researchers was that 16 of the 18 community-driven stores were structured as co-ops. There are several common reasons this model succeeds in many food desert communities: residents may be wary of outside developers or concerned about the gentrification a new commercial grocery store can bring, and a chain grocery store is unlikely to rely on community engagement to decide which products will be offered, resulting in a mismatch between supply and demand.⁴⁷

Mandela Grocery is a worker-owned cooperative food store in West Oakland, CA that is structured as a partnership with a non-profit organization. It sources its products from local farms and vendors – particularly those owned and run by people of color – in order to keep as much money as possible within the local economy. There is an emphasis on organic produce and “clean” foods, including nutritious packaged foods. The co-op was founded in 2009 and has continued to be successful, recently adding online shopping and home delivery to its offerings, and in 2019 began organizing a sister market in East Oakland in collaboration with an urban farming nonprofit.⁴⁸

The Detroit People’s Food Co-op is a Black-led and community-owned grocery cooperative founded by the Detroit Black Community Food Security Network. It began as a community organization working to establish community gardens and mitigate food insecurity through a buying club centered around the produce from those gardens. It received assistance from the City of Detroit to obtain a site and a grant from a non-profit for technical assistance with community outreach and membership development. The

⁴⁶ The Food Trust and Nutrition Incentive Hub. (2022). *Bringing Incentives to Corner Stores: A Comprehensive Guide*.

⁴⁷ Brinkley, C., Glennie, C., Chrisinger, B., and Flores, J. 2019. “‘If you Build it with them, they will come’: What makes a supermarket intervention successful in a food desert?” *Journal of Public Affairs*, Volume 19, Issue 3.

⁴⁸ <https://www.mandelagrocery.coop/>

co-op's objectives are not only to improve access to healthy food in the low- to moderate-income where it is sited but also to educate the community about nutrition and food sustainability. The co-op prioritizes local growers and Detroit-based suppliers in order to maximize local economic development. The Detroit Black Community Food Sovereignty Network and Develop Detroit Inc. collaborated to finance the project through a combination of donations, grants, loans, and New Markets Tax Credits.⁴⁹

The New Orleans Food Co-op opened in 2011 with funding support from the city, and it has not only been successful in addressing access to nutritious food but has also become involved in community workforce development. With support from Goodwill, the co-op runs an internship-to-employment program for local youth. It has also partnered with a local college to offer cooking and nutrition classes onsite, meal plans, and healthy recipes. A significant proportion of the 3,700 co-op members are on the limited-income membership plan; others take part in a working-member program to receive discounts.⁵⁰

Mobile grocers

A mobile grocer is an innovative solution to food access challenges in densely populated urban areas where siting a store is problematic for a variety of reasons. Sometimes the issue is a lack of available space; in other instances, very large food deserts spanning multiple neighborhoods are best served by a mobile grocer that visits each community once or twice a week.

One such example is the Memphis Mobile Grocer established by non-profit organization The Works, Inc. Through community outreach efforts in South Memphis neighborhoods over a period of two years, it became clear that access to fresh, nutritious food was a community priority, and the organization founded a seasonal farmers market in 2010, which eventually led to the establishment of a year-round grocery store on a site nearby. In 2022 they added an 18-wheeler mobile unit that makes recurring stops throughout underserved communities in inner-city Memphis, which has been called "America's Hunger Capital." The Works, originally founded to address a lack of affordable housing, saw in the course of 25 years of community work that the problem was not only food insecurity but also a severe lack of access to transportation – not only low vehicle access, but also extremely limited public transportation for the sprawling city. The Mobile Grocer makes 2-hour stops in communities four days a week, with a regular schedule that residents can rely on. According to The Works, the customers who rely most on the Mobile Grocer are low-income seniors, for whom food access is a particularly difficult problem.⁵¹

Mobile groceries of varying sizes have proliferated in cities throughout the US along a wide variety of business models. Chattanooga Mobile Market (Tennessee) is run in a similar way to the Memphis Mobile Grocer, while Santa Fe's MoGro Mobile Grocery brings fresh food to tribal communities. There are also mobile farmers markets that bring fresh fruits and vegetables to different communities each day of the week, mobile units that partner with brick-and-mortar stores, and combination food truck-mobile grocers.⁵² It is clearly a business model that is growing and developing and offers opportunities for tailoring to fit an individual community's needs.

⁴⁹ <https://www.detroitfoodpc.org>

⁵⁰ <http://www.nolafood.coop/>

⁵¹ <https://theworkscdc.org/mobile-grocer/>

⁵² <https://www.healthyfoodaccess.org/mobile-markets>

Farmers markets

Farmers markets are familiar to most city-dwellers, having proliferated – particularly in wealthy areas – over the past 20 years. However, there have been some interesting recent efforts to site these sources of fresh local produce in low- and moderate-income communities. Creative solutions such as pop-up markets in transit hubs in Dayton, OH and Atlanta, GA have been successful because they work around busy schedules and transportation limitations while giving vendors access to a large customer base.⁵³

USDA offers a [National Farmers Market Directory](#) and technical support programs to help vendors at all farmers markets navigate the process of accepting SNAP and WIC.⁵⁴ The Milwaukee Market Match program provides matching funds that allow people who spend \$1 in SNAP/EBT benefits to purchase produce to receive \$1 in free produce, effectively enabling participants to buy twice as many fruits and vegetables at participating farmers markets. Milwaukee Market Match was used by 793 households to purchase nearly \$20,000 worth of produce from five different farmers markets across the county during its first 10-week pilot program in 2020.⁵⁵

Community Input

On Monday January 22, 2024, the project partners attended a public meeting held in conjunction with the Northside Coalition monthly meeting. Approximately 15 people from the community attended. An overview of this study was provided by the consultant team, which also fielded questions from those in attendance. Questions ranged from how a food desert is designated to what agency inspects grocery stores and bodegas. Community members also offered insight into some of the needs of the community around food: for instance, when organizations provide food, they fail to consider culturally relevant fare for the neighborhood, or proprietors assume that residents own multiple kitchen gadgets and can easily put together a one-dish meal in a blender or food processor. There were comments about the lack of food stores in the neighborhood as well as concern that if a large grocery store chain opened it could hurt the local bodega owners. Attendees also shared that they prefer to shop for food outside the First Ward since there are more options in other areas.

While residents were excited about the study, there was concern about the outcome if an appropriate site could not be found. Community members provided examples of previous enterprises attempted in the community and the challenges they faced. For example, residents noted that there was a mobile food bank that followed a regular schedule and set up in area parking lots. Another community member talked about a Better Market, which was an effort by one woman in the First Ward to link the community with local farmers – for the benefit of both groups. The business was subsequently shut down due to lack of appropriate licenses.

As noted earlier, research suggests that the best solutions often are custom-tailored to the community, as opposed to a one-size-fits-all answer. For any improvement to food access to be successful, ongoing community input and support will be necessary.

The results of the Community Survey referenced in sections above are presented in full in Appendix 2.

⁵³ <https://www.politico.com/news/magazine/2020/01/23/atlanta-pop-up-markets-health-food-policy-100525>

⁵⁴ <https://www.fns.usda.gov/farmersmarket>

⁵⁵ <https://county.milwaukee.gov/EN/County-Executive/News/Press-Releases/County-Executive-Praises-Passage-of-1.1M-in-ARPA-Funding-for-Milwaukee-Market-Match-Food-Program>

Conclusions

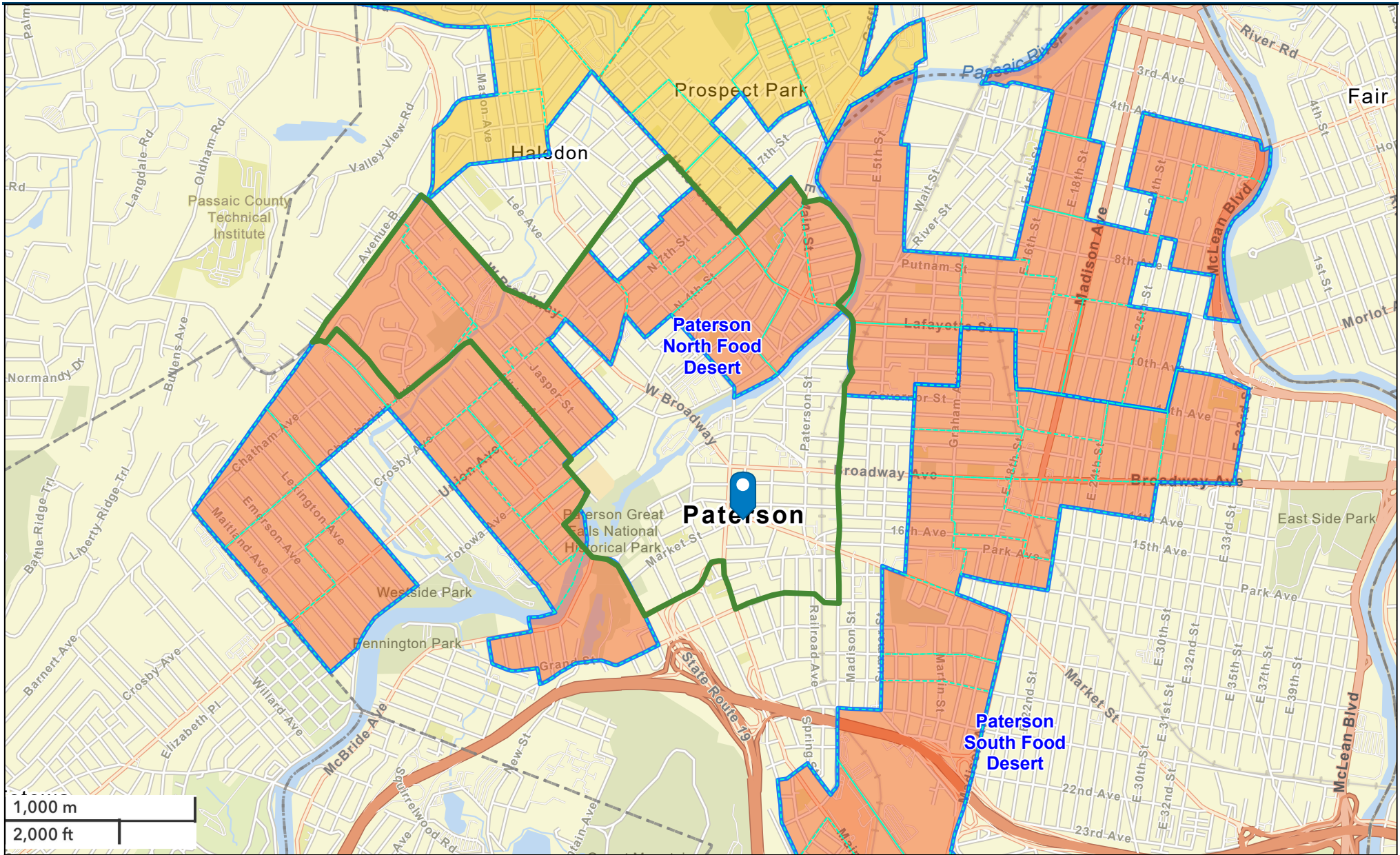
It is clear that the young, diverse, and growing population of the First Ward – particularly residents of the area immediately surrounding the target sites – is in need of additional options for food shopping, but finding a solution that is supported by the community and in turn promotes local economic development is far from simple. Traditional grocery stores and supermarkets generally transport products from outside the area and therefore do not necessarily help build local entrepreneurship or support local businesses, although their presence can help spur the establishment of other businesses in their immediate surroundings. The benefits farmers markets tend to be more concentrated in the local economy, but those impacts are very difficult to predict. Farmers markets can take years to become sustainable and generally require significant city or county management in their initial phases.

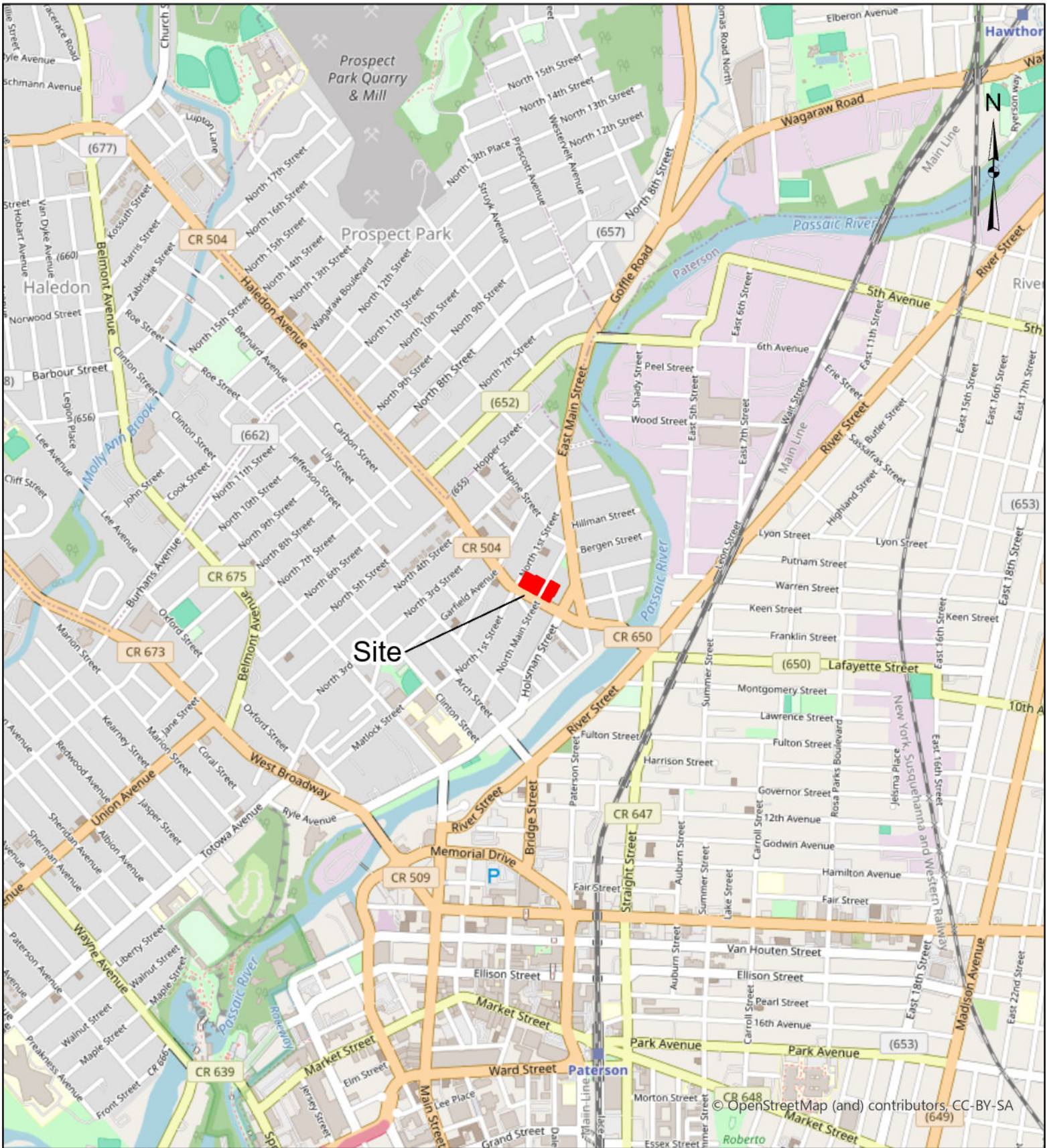
There are less traditional approaches to addressing food insecurity that could – with sufficient community support – be a better fit for the First Ward:

- A healthy bodega/healthy corner store initiative could dramatically increase access to fresh produce and nutritious prepared foods while supporting existing small retailers.
- Given the shortage of available land in the Ward, a mobile grocer (either in partnership with a small grocery store or not) could be an ideal way to provide access to fresh food while removing the obstacle of transportation almost entirely.
- A food co-op requires the most community involvement among the various solutions explored, but because co-ops have flexible pricing schemes and present opportunities to support local farmers and entrepreneurs, it could be the option that fits First Ward (and County) goals the best.

The next component of this study is a general physical evaluation of the target site, identifying constraints and impediments to their development, and providing recommendations for addressing them.

Appendix 1: Full-size maps





Legend

■ Site Parcels

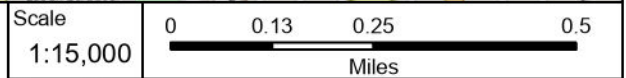


Figure Title **Site Location Map**

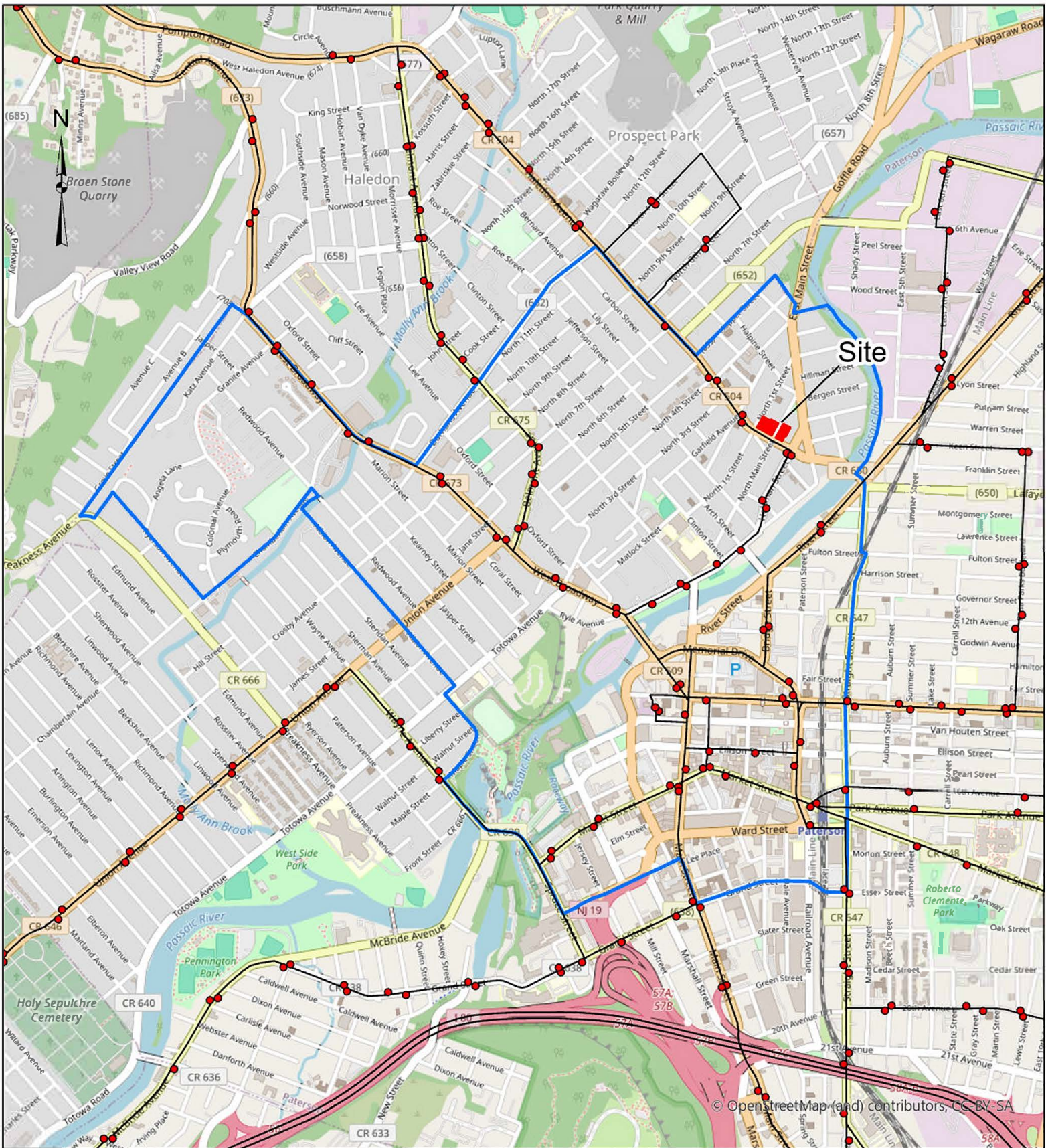
Client **County of Passaic**

Figure No.

Project **Market Analysis
Paterson, New Jersey**

1

Print Date
2/22/2024

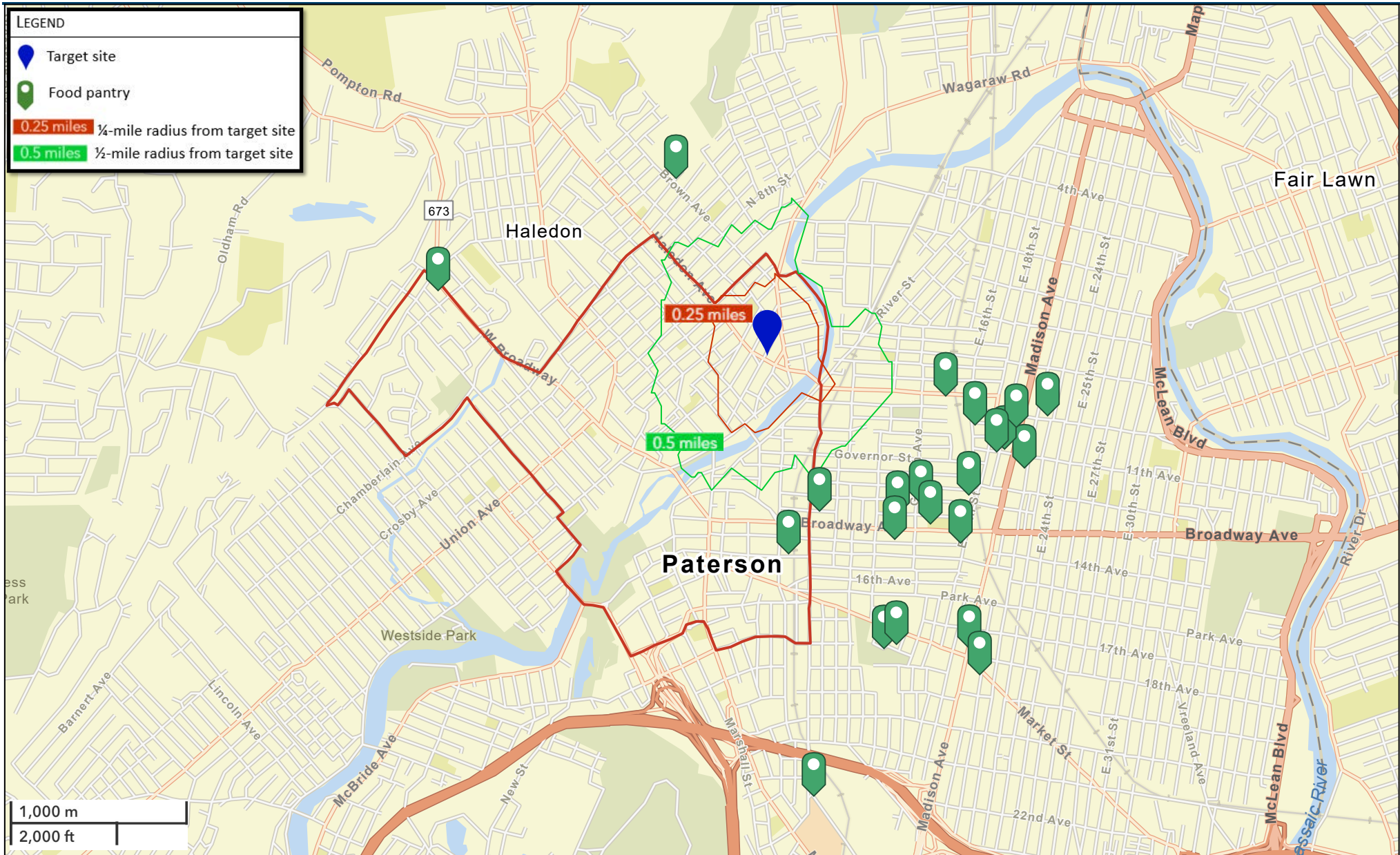


Legend

- Bus Route
- Bus Stops
- First Ward Boundary
- Target Site Parcels

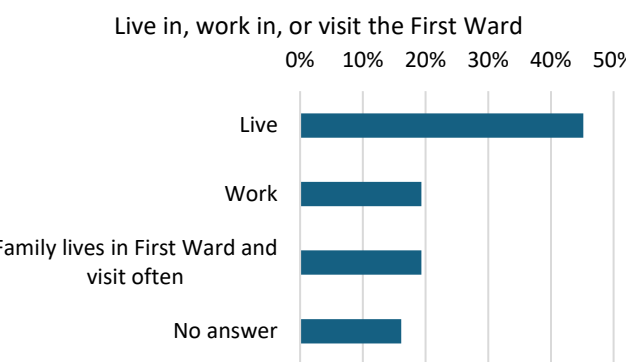
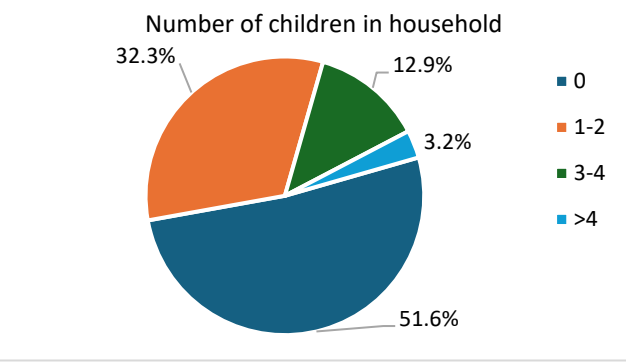
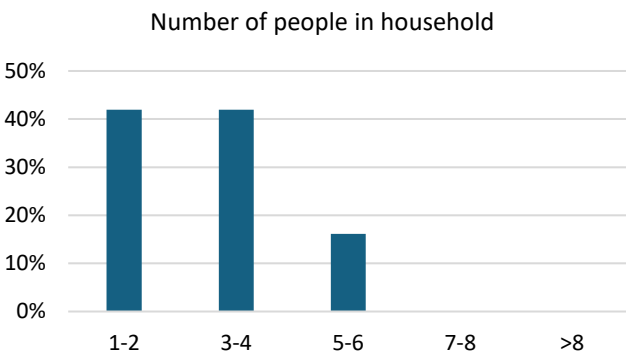
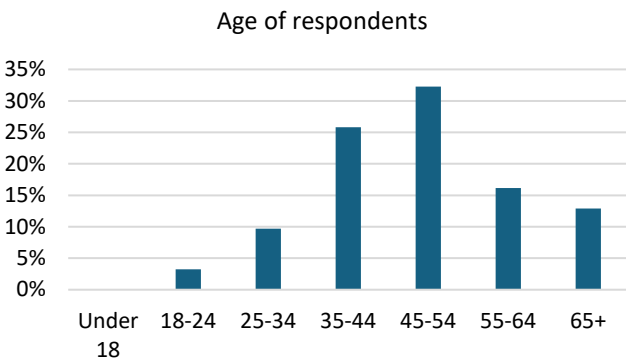
Scale	0	0.13	0.25	0.5
1:18,000	Miles			

Figure Title	Public Transit		
Client	County of Passaic		
Project	Market Analysis Paterson, New Jersey		
Figure No.	2		
Print Date	4/18/2024		



Note: In April 2024 the Passaic County Department of Human Services requested bid proposals for a mobile food pantry. At the time this Study was being conducted, the service area and route of the mobile food pantry were not yet determined.

Appendix 2: Community Survey Results



	Number
Survey respondents	31
English	30
Spanish	1

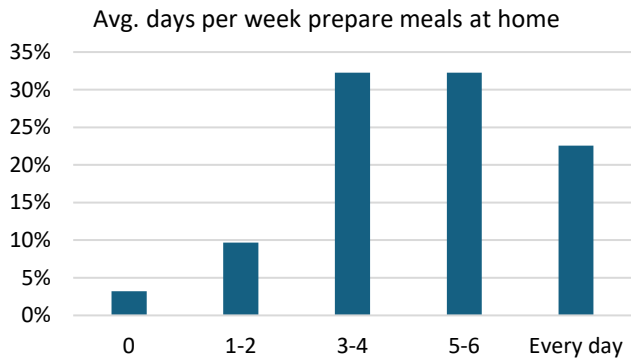
	Percent	Number
Gender		
Female	83.9%	26
Male	16.1%	5
Other/not specified	0.0%	0

Age		
Under 18	0.0%	0
18-24	3.2%	1
25-34	9.7%	3
35-44	25.8%	8
45-54	32.3%	10
55-64	16.1%	5
65+	12.9%	4

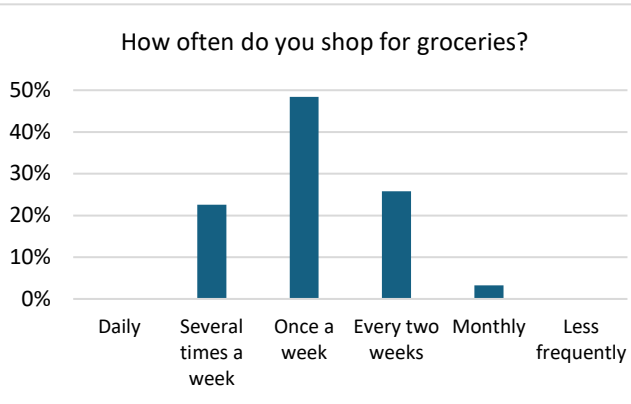
Number of people in household		
1-2	41.9%	13
3-4	41.9%	13
5-6	16.1%	5
7-8	0.0%	0
>8	0.0%	0

Number of children in household		
0	51.6%	16
1-2	32.3%	10
3-4	12.9%	4
>4	3.2%	1

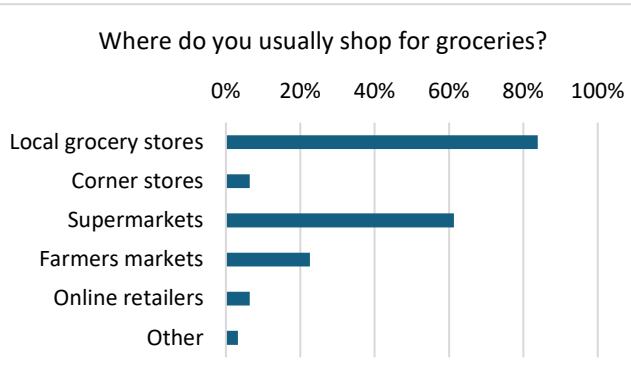
Live in, work in, or visit the First Ward		
Live	45.2%	14
Work	19.4%	6
Family lives in First Ward and visit often	19.4%	6
No answer	16.1%	5
Attend school	0.0%	0



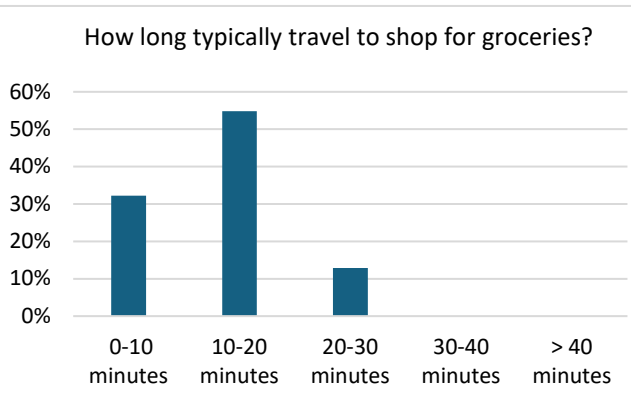
	Percent	Number
Avg days per week prepare meals at home		
0	3.2%	1
1-2	9.7%	3
3-4	32.3%	10
5-6	32.3%	10
Every day	22.6%	7



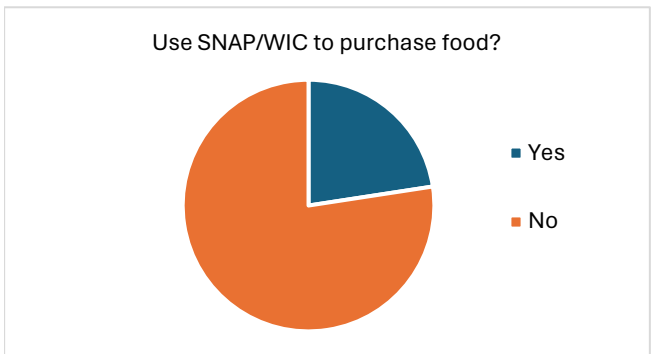
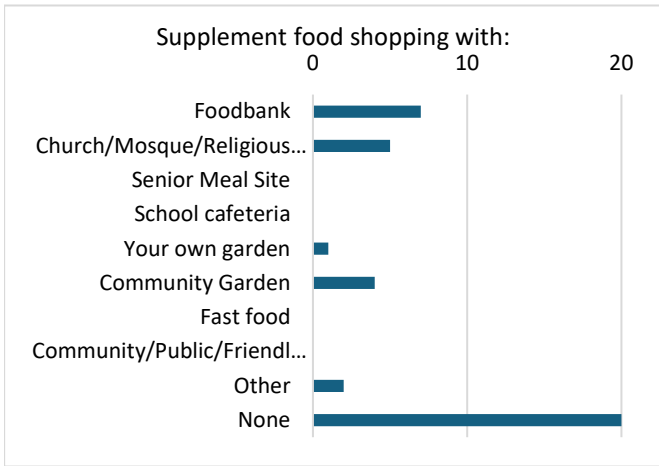
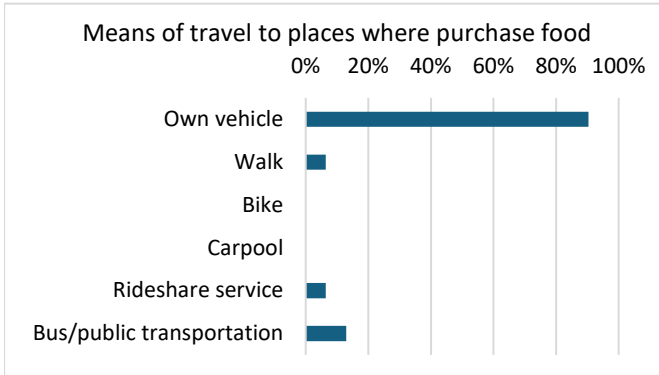
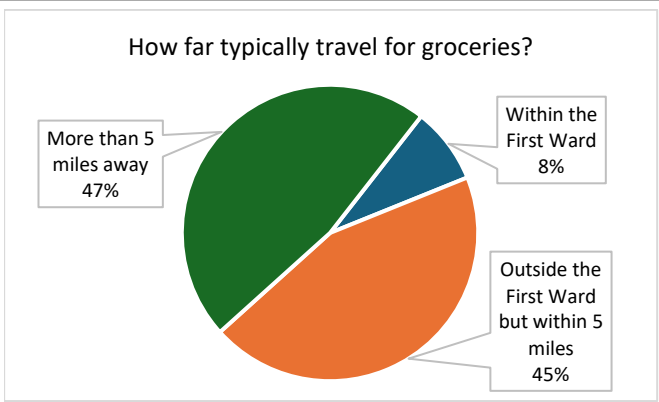
How often shop for groceries		
Daily	0.0%	0
Several times a week	22.6%	7
Once a week	48.4%	15
Every two weeks	25.8%	8
Monthly	3.2%	1
Less frequently	0.0%	0



Where do you usually shop for groceries?		
Local grocery stores	83.9%	26
Corner stores/bodegas	6.5%	2
Supermarkets	61.3%	19
Farmers markets	22.6%	7
Online retailers	6.5%	2
Others (Please specify)	3.2%	1
SuperM supermarket	3.2%	1



How long typically travel to place where shop for groceries?		
0-10 minutes	32.3%	10
10-20 minutes	54.8%	17
20-30 minutes	12.9%	4
30-40 minutes	0.0%	0
> 40 minutes	0.0%	0

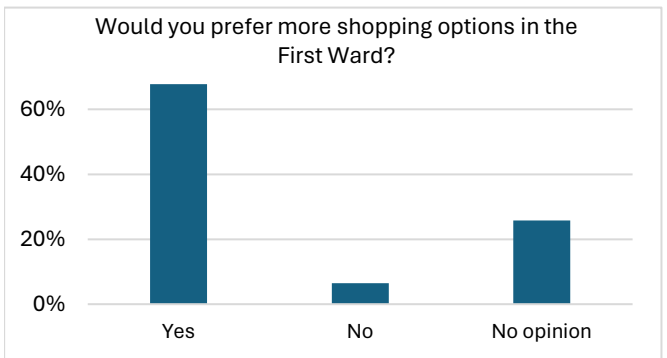
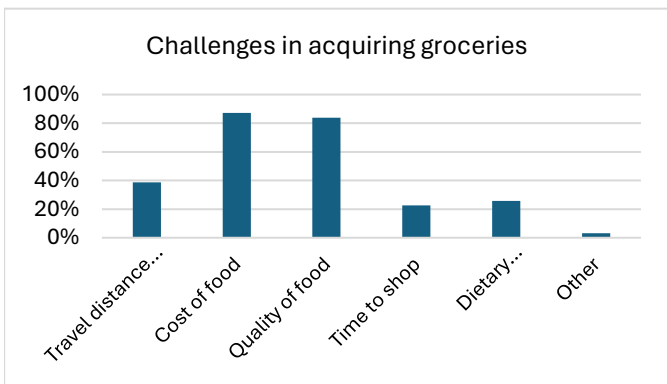
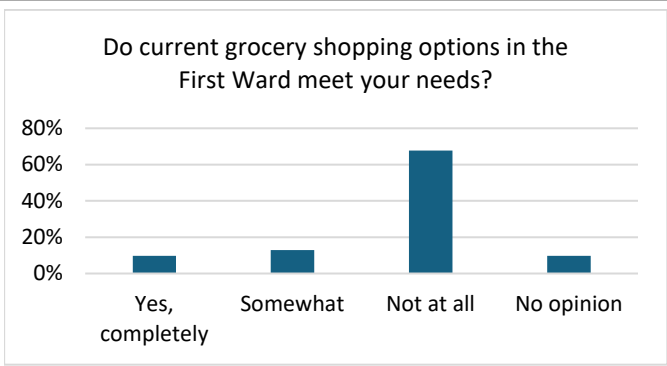


	Percent	Number
How far typically travel to buy groceries?		
Within the First Ward	9.7%	3
Outside the First Ward but within 5 miles	51.6%	16
More than 5 miles away	54.8%	17

How travel to the places where purchase food		
Own vehicle	90.3%	28
Walk	6.5%	2
Bike	0.0%	0
Carpool	0.0%	0
Rideshare service (Uber, Lyft, etc.)	6.5%	2
Bus/public transportation	12.9%	4
Other	0.0%	0

Supplement food shopping with any of the following?		
Foodbank	22.6%	7
Church/Mosque/Religious center	16.1%	5
Senior Meal Site	0.0%	0
School cafeteria	0.0%	0
Your own garden	3.2%	1
Community Garden	12.9%	4
Fast food	0.0%	0
Community/Public/Friendly Fridges	0.0%	0
Other	6.5%	2
None	64.5%	20

Use SNAP/WIC/Food stamps to purchase food		
Yes	22.6%	7
No	77.4%	24

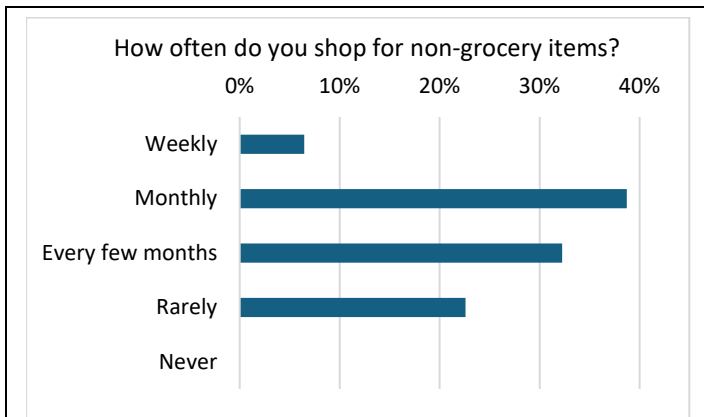


	Percent	Number
Do current grocery shopping options in the First Ward meet your needs?		
Yes, completely	9.7%	3
Somewhat	12.9%	4
Not at all	67.7%	21
No opinion	9.7%	3

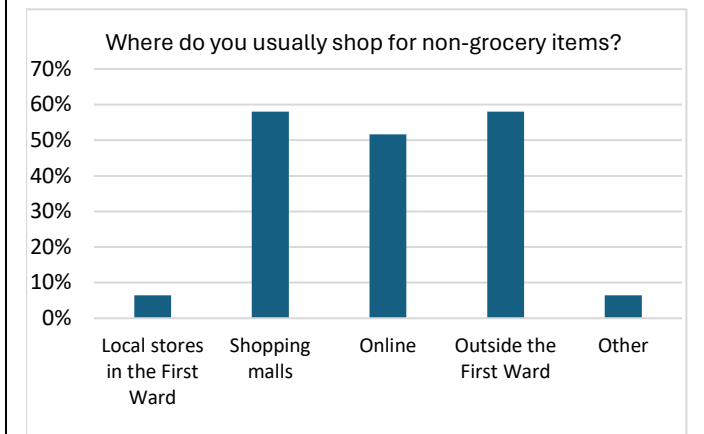
Most important factors when choosing where to shop for groceries (multiple answers allowed)		
Price	93.5%	29
Quality of products	96.8%	30
Variety of products	58.1%	18
Location/convenience	54.8%	17
Store cleanliness and organization	71.0%	22
Customer service	51.6%	16
Availability of food that meets specific dietary needs (organic, vegan, lactose free, allergies, halal, kosher, gluten free)	51.6%	16
Other (Please specify)	0.0%	0

3 main challenges in acquiring groceries for your family		
Travel distance to store	38.7%	12
Cost of food	87.1%	27
Quality of food	83.9%	26
Time to shop	22.6%	7
Dietary restrictions	25.8%	8
Other	3.2%	1
Purchasing food & snacks from corner stores that's not expired		1

Would you prefer more shopping options within the First Ward?		
Yes	67.7%	21
No	6.5%	2
No opinion	25.8%	8



	Percent	Number
How often shop for non-grocery items?		
Weekly	6.5%	2
Monthly	38.7%	12
Every few months	32.3%	10
Rarely	22.6%	7
Never	0.0%	0



Where do you usually shop for non-grocery items? (multiple answers allowed)		
Local stores in the First Ward	6.5%	2
Shopping malls	58.1%	18
Online	51.6%	16
Outside the First Ward	58.1%	18
Other	6.5%	2
Walmart		1
Flea Market at Giant Stadium		1

What types of food stores do you want to see in your community (open answer)	Number of responses
(No response)	7
Affordable	2
A store like a Trader Joe's or one that stocks organic foods	1
Ones with good quality food	1
Quality, reasonable price stores	1
Minority/Women Owned & Operated	2
Farmers Markets with fresh and affordable produce	1
grocery store/farmers market	1
Aldi, Shoprite, Farmers Market	1
1 generic grocery store	1
A store that is affordable, and have nutritional items and have a section in the store that will that shows how to prepare meals	1
ShopRite, Walmart, Costco, BJ's	1
Fresh food	1
Grocery, restaurant	1
Fresh and affordable produce. I would like a store that is clean	1
Quality and reputable food stores	1
Fresh fruit and veggies, reasonably priced	1

Walmart	1
Resident-own businesses that hire the community they serve	1
Farmers market, Whole food /Healthier options	1
Whole Foods and ShopRite	1
Community grocery stores	1
Supermarket	1

Is there anything else we should know about how you decide where to shop for food/groceries? (open answer)	
The quality of foods, prices, and customer service are so vital. I would rather pay more and be fulfilled than little and be discontented with the purchase and/or the services	
They jack up the prices knowing people have to pay if they are unable to go to farmers markets	
Checking all the sale papers to see who has the best deal (price quality and freshness)	
Do not disturb the local bodegas/stores already in the neighborhood	
Convenient wholesalers	
Cost; sales; coupons	
Fresh vegetables	
(No response – 24)	