



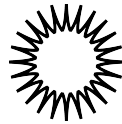
# SUPPORTING SAN FRANCISCO'S MAKERS AND MOVERS

PLANNING  
DEPARTMENT  
OEWD  
SPUR  
BAE URBAN  
ECONOMICS  
SF MADE

# STEERING COMMITTEE



SAN FRANCISCO  
**PLANNING DEPARTMENT**



**SPUR**



**SAN FRANCISCO**  
Office of Economic and Workforce Development

**bae** urban economics



SAN FRANCISCO  
WHOLESALE  
PRODUCE MARKET



San Francisco  
Department of Public Health





# INTRODUCTION

## Focus of the Study

- Food and Beverage Manufacturing
- Food & Beverage Wholesalers/Distributors

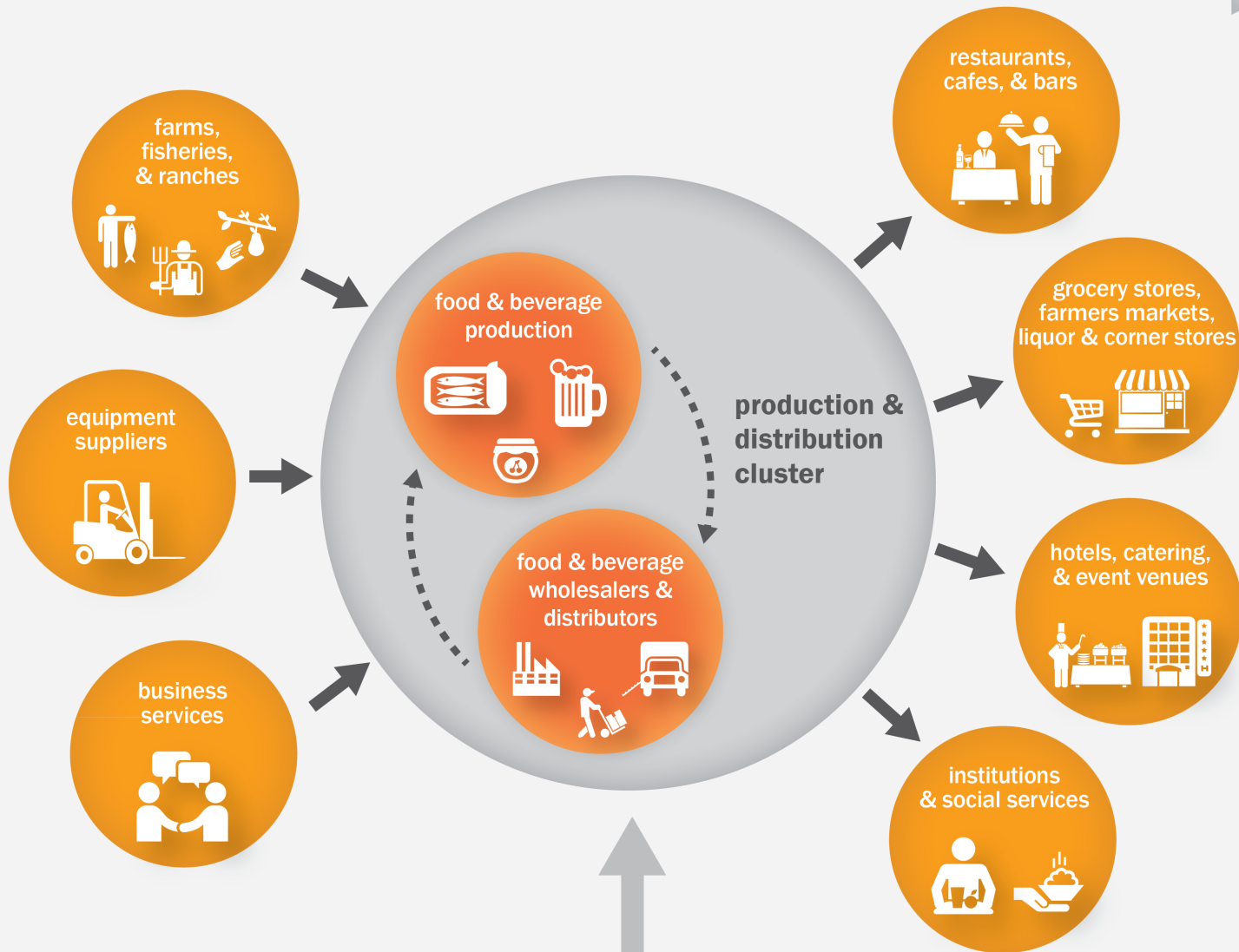
## Benefits to San Francisco's Economy

- Employment and Socio-Economic Diversity
- Entrepreneurial Opportunity
- Cluster Effects
- San Francisco Brand



suppliers

consumers



supporting factors



real estate



capital



government support



transportation access

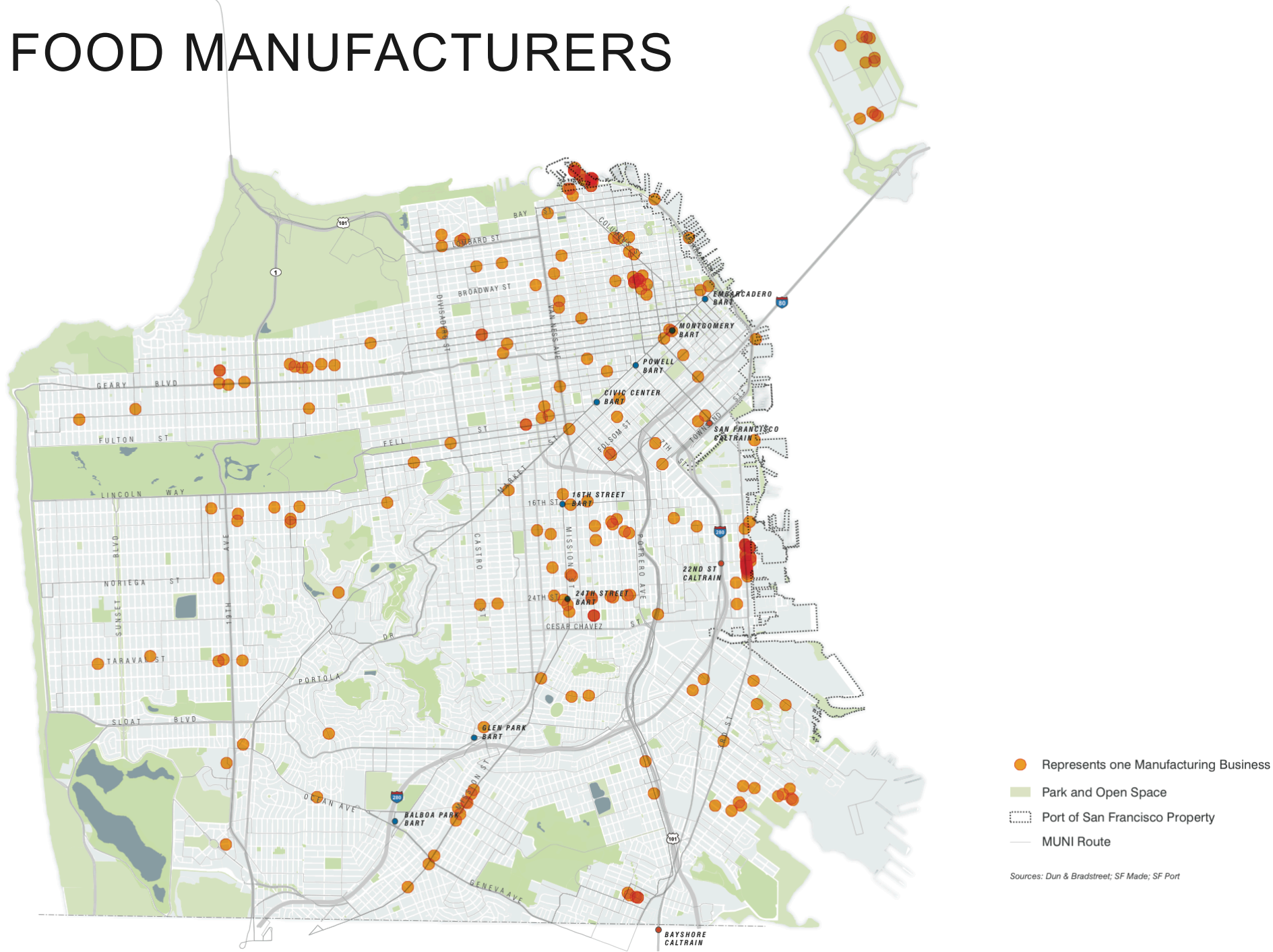


skilled workforce



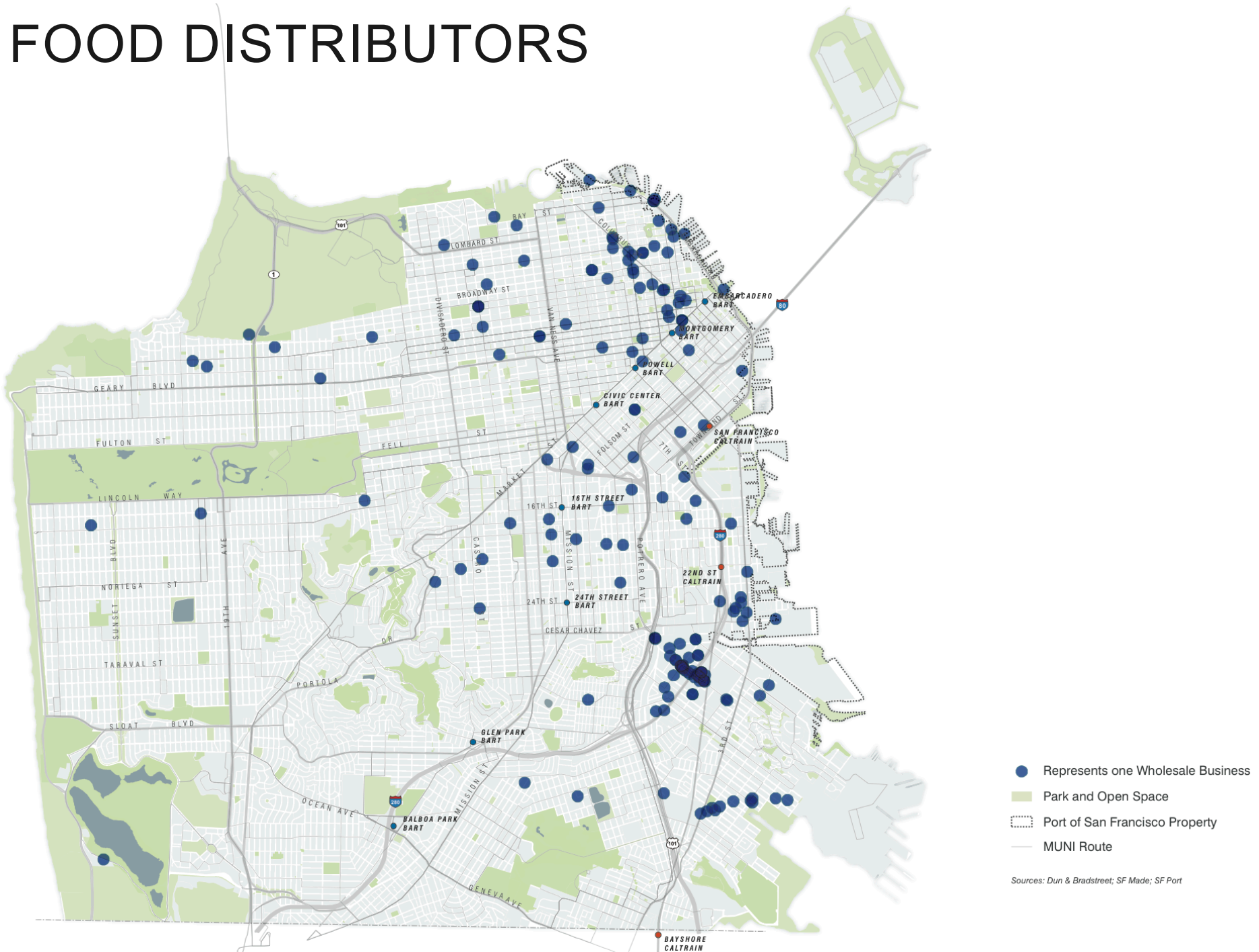
market trends

# FOOD MANUFACTURERS



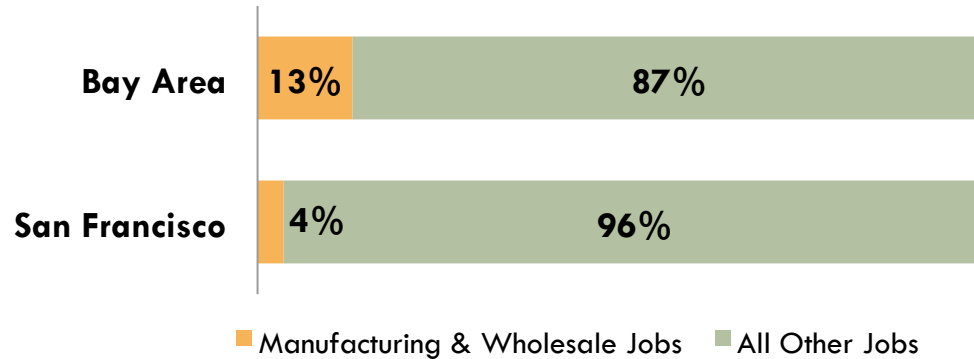


# FOOD DISTRIBUTORS

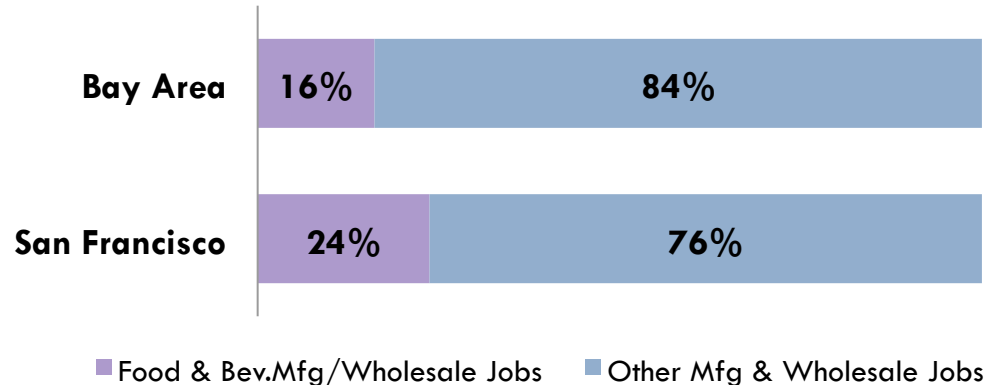


# REGIONAL TRENDS

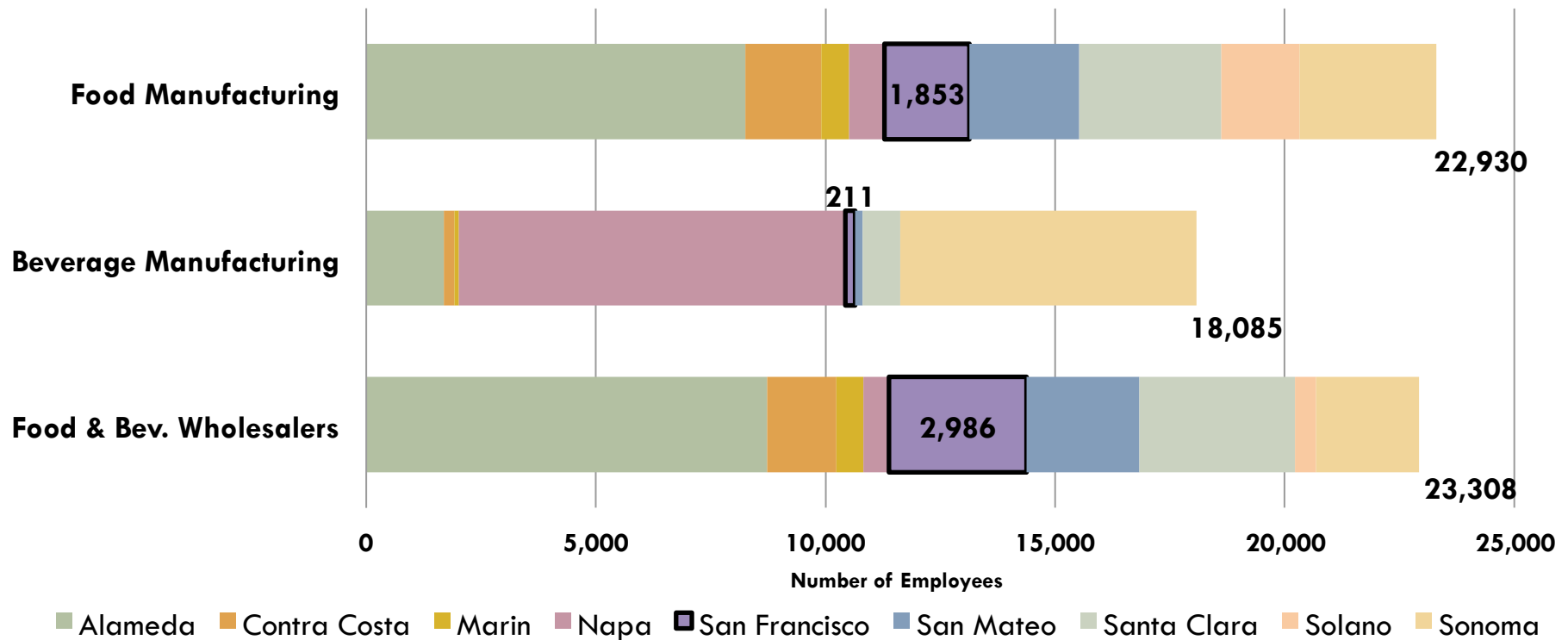
**Manufacturing/Wholesale vs. Total Economy  
2012**



**Food/Bev. vs. Other Mfg/Wholesale  
2012**



# REGIONAL TRENDS



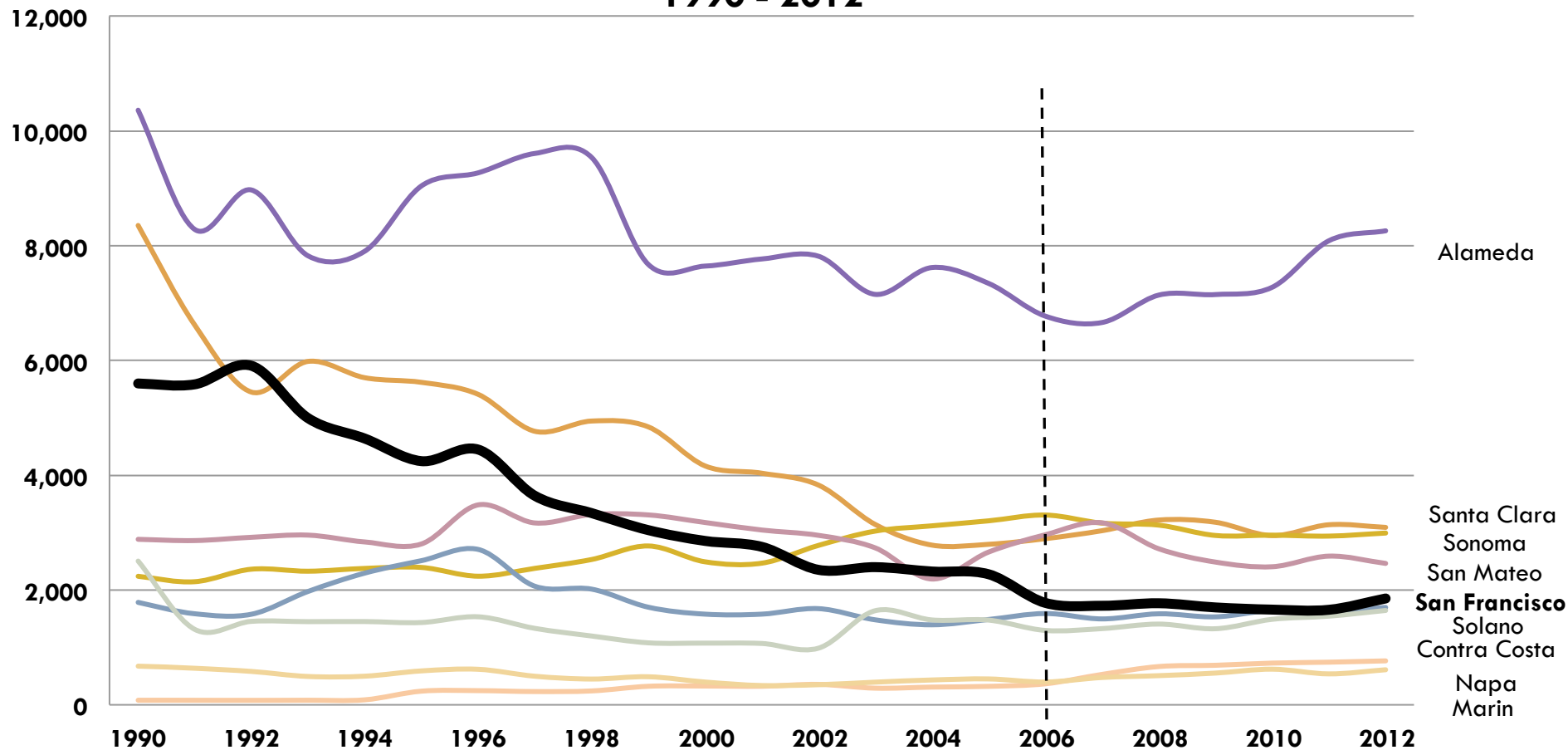
Sources: Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW), 2012; BAE, 2014

\*As per QCEW disclosure policy, employment data for Beverage Manufacturing and Alcoholic Beverage Wholesalers in Solano County and for Farm Product Raw Materials Wholesalers in multiple counties are not publicly disclosed.



# REGIONAL TRENDS

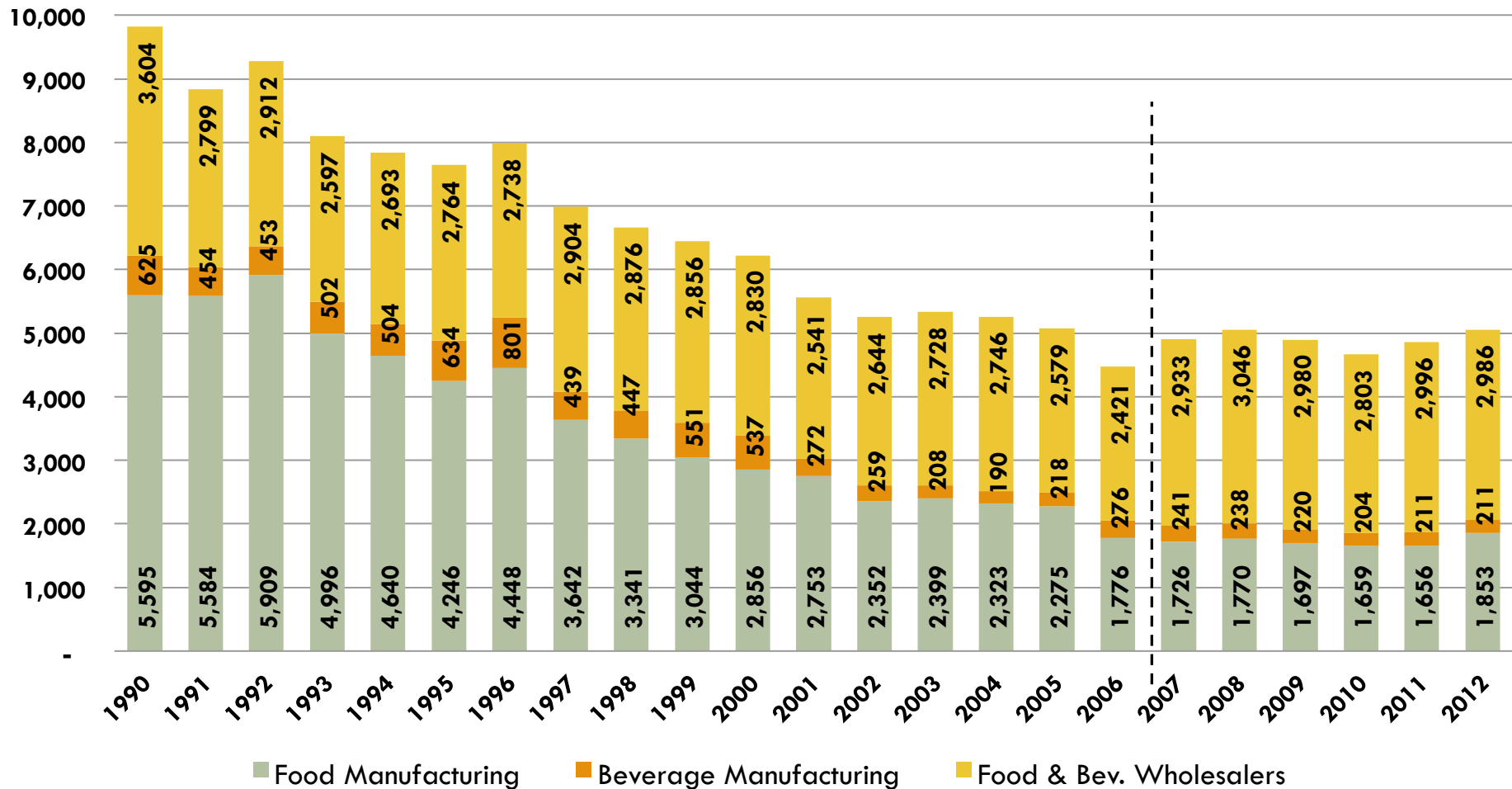
## Food Manufacturing Employment Growth 1990 - 2012



Sources: Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW), 2012; BAE, 2014.

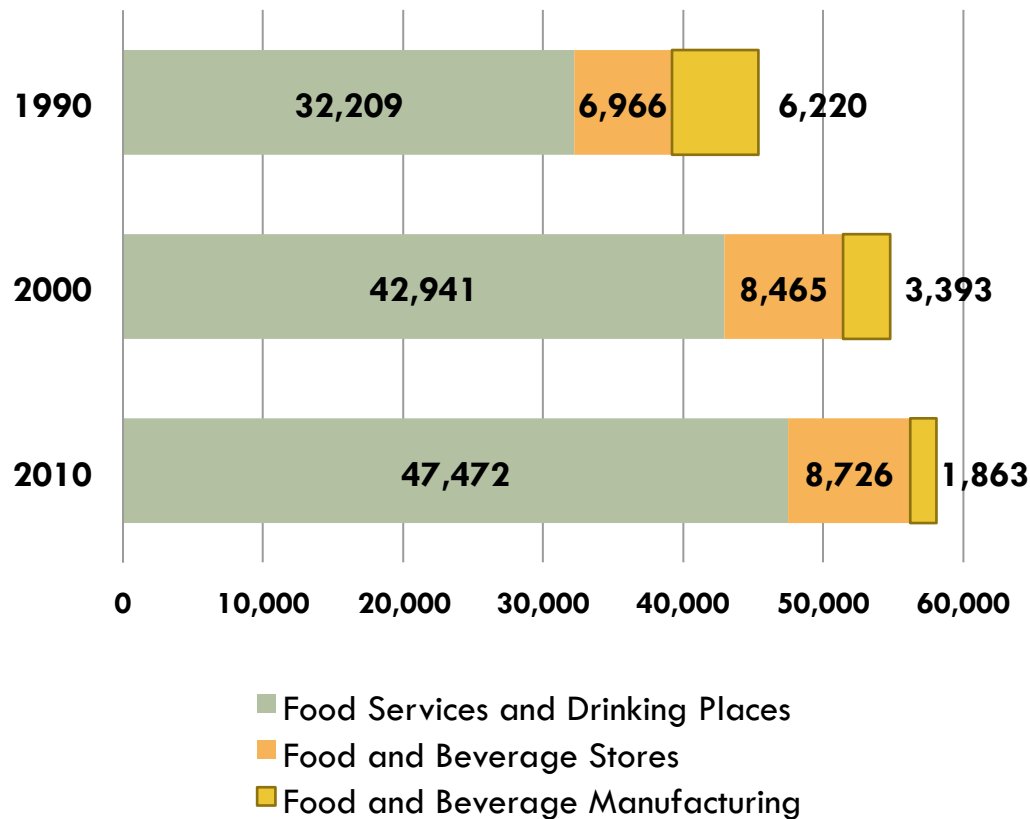
# SAN FRANCISCO TRENDS

## San Francisco Food & Beverage Cluster Employment Trends 1990 - 2012



# SAN FRANCISCO TRENDS

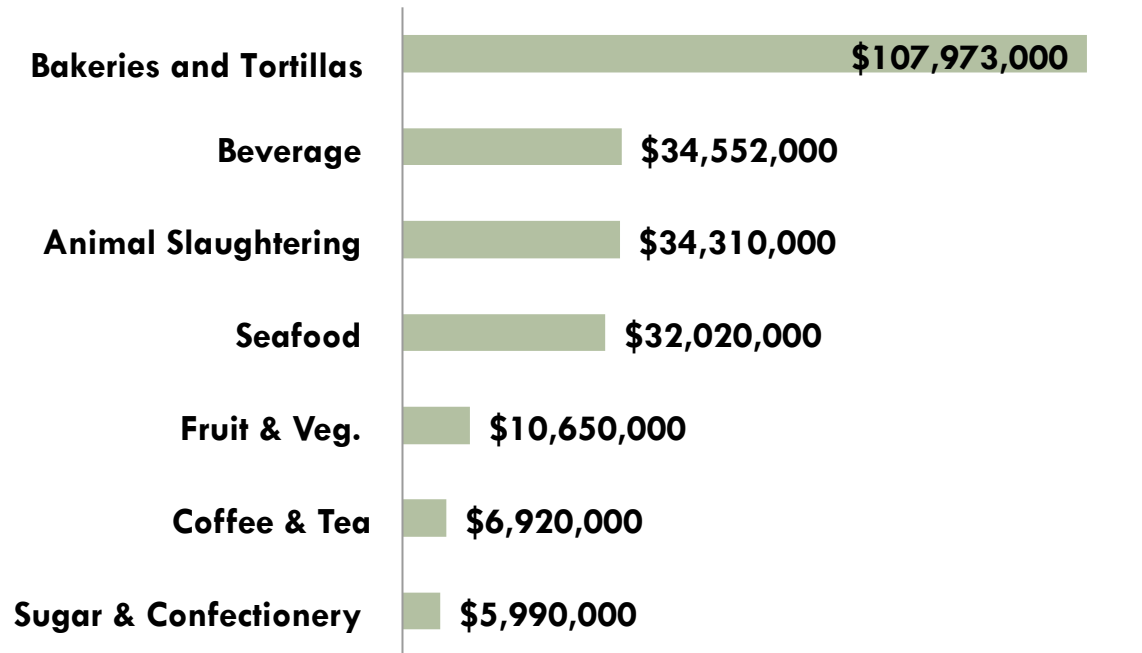
**Food and Beverage Jobs in San Francisco, 1990 - 2010**



Note: This figure does not include food and beverage distribution/wholesale employment. The final report will include those numbers.

# REVENUE

## San Francisco Food Manufacturing Revenue 2012





# WAGES

Alcoholic Bev. Wholesale/Dist.

\$80,198

Grocery Wholesale/Dist.

\$59,334

Beverage Manufacturing

\$55,196

Food Manufacturing

\$44,698

Retail Trade

\$37,558

Lodging/Accommodations

\$36,735

Food/Bev. Stores

\$30,095

Resaurants and Bars

\$21,148

\$0 \$20,000 \$40,000 \$60,000 \$80,000

Average Annual Wage

Note: These figures are for the San Francisco-Oakland-Fremont MSA. The final report will highlight wage figures specific to SF county, in addition to these numbers.

# SUMMARY OF KEY FINDINGS

- Small share of overall SF employment
- 25% of all manufacturing/wholesaling jobs
- Recent growth
- Quality wages / career ladder
- Has more jobs in distribution than manufacturing
- Bakeries is largest type of food manufacturer



# KEY CHALLENGES

- Real Estate
- Access to Capital
- Workforce
- Transportation
- Regulations

# RECOMMENDATIONS

- Affordable & Suitable Space
- Access & Mobility
- Technical Assistance
- Workforce Development & Employee Retention





# QUESTIONS & MORE INFORMATION



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