

Project Overview: Food Resilience throughout the NCR

TPB Freight Subcommittee

July 10, 2025



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Agenda

Introductions & Project Overview

Mapping & Data

Identified Gaps

Real-World Examples of Coordination





Introductions & Project Overview





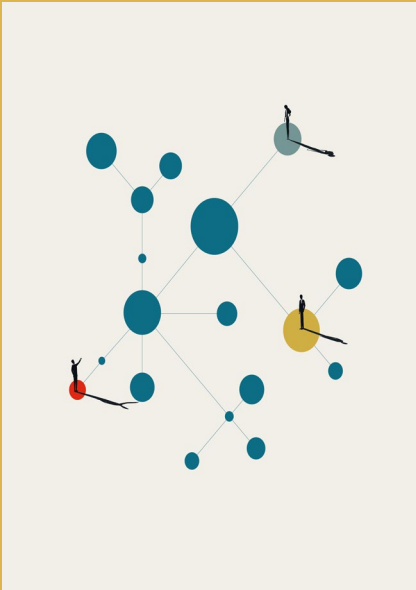
What Do We Know About Supply Chains?



**COMPLEX ADAPTIVE
SYSTEMS**



**INCREASINGLY
GLOBAL**



INTERDEPENDENT



**LARGELY PRIVATE
SECTOR**



**DESIGNED FOR
EFFICIENCY, NOT
RESILIENCE**





What Were Our Desired Outcomes?



Recognize how critical commodity supply chains can be disrupted



Where possible, buy down the risk of disruption



If disrupted, meet near-term needs while helping ensure that flow is restored



What are the Trends?



Increase in
disruptive events



Growing **awareness**
of supply chain
resilience



Increased need for
private/public
partnerships



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What Have We Accomplished?

1

Mid-Atlantic Food Supply
Chain Working Group

2

Summit and Capstone Events

3

Supply Chain Workshops



Multiple Close, Trusted
Private Sector Partnerships



A Suite of Mapping Products
and Planning Tools



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Mid-Atlantic Food Supply Chain Summary



Washington Supermarket Leaders

- Giant Still Commands, Sales Flat
- Albertsons Share Dips To 15.9%
- International Mkts. Add 2 Stores
- Amazon Opens AF Units
- Aldi Posts Strong Comp Sales

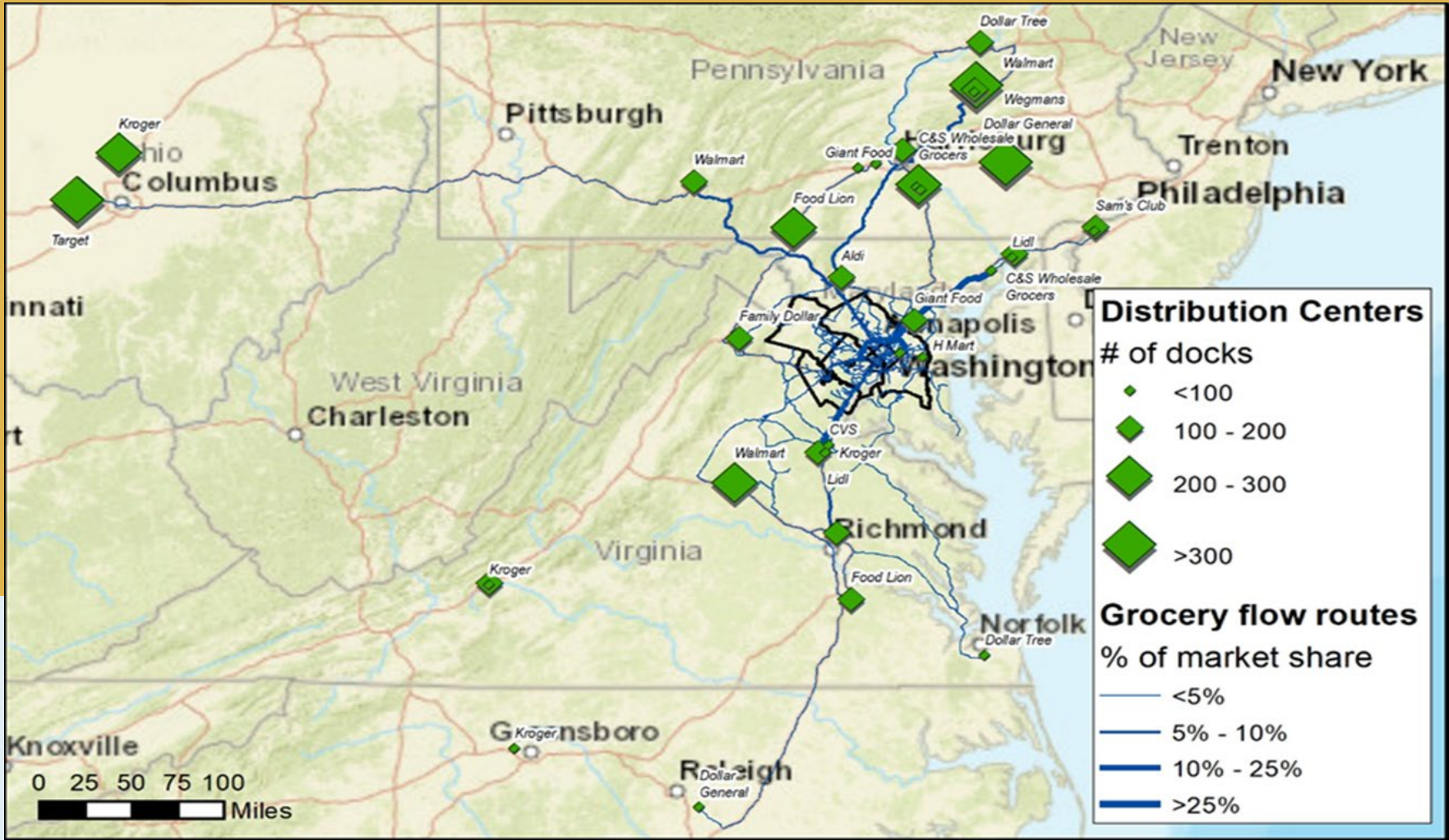
		2025	2025 Sales	% of 2025	2024	2024 Sales	% of 2024
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Giant Food	112	\$4,341.50	28.62%	113	\$4,252.20	28.92%
2	Albertsons (Balducci's/Safeway)	83	\$2,415.40	15.92%	87	\$2,361.70	16.06%
3	International Markets	109	\$1,826.10	12.04%	107	\$1,743.70	11.86%
4	Harris Teeter	43	\$1,555.70	10.25%	43	\$1,519.10	10.33%
5	Wegmans	15	\$1,522.70	10.04%	15	\$1,484.20	10.10%
6	Amazon Groc. (AF/Whole Foods)	33	\$1,204.60	7.94%	32	\$1,130.70	7.69%
7	Trader Joe's	22	\$666.00	4.39%	21	\$613.80	4.18%
8	Aldi	57	\$590.80	3.89%	55	\$540.40	3.68%
9	Food Lion	32	\$466.10	3.07%	32	\$456.70	3.11%
10	Shoppers	15	\$411.00	2.71%	15	\$409.40	2.78%
		521	\$14,999.90	98.87%	520	\$14,511.90	98.71%

This chart lists the top 10 supermarket retailers in the Washington market. Counties/cities included are: Washington, DC; Calvert, Charles, Frederick, Montgomery and Prince George's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Prince William, Spotsylvania, Stafford and Warren and the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. Petroleum sales are not included. () Indicates another banner used by the company. **Total supermarket sales for the area are \$15.17 billion.**

Source: Food World, June 2025



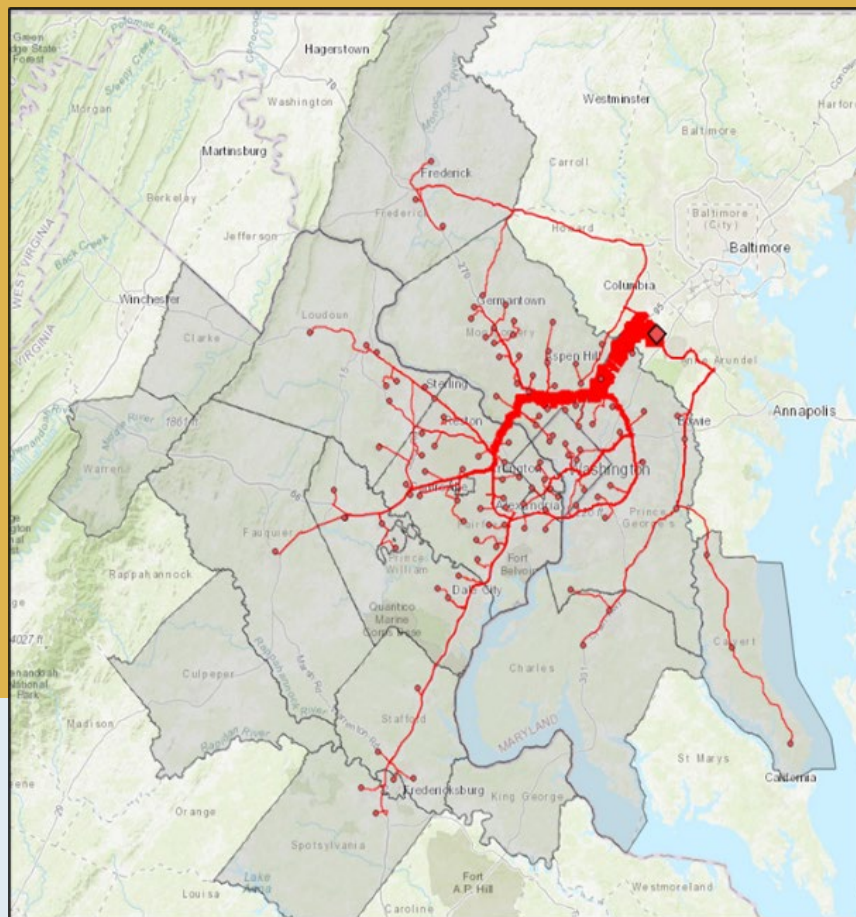
Project Mapping: Midstream of the Food Supply Chain



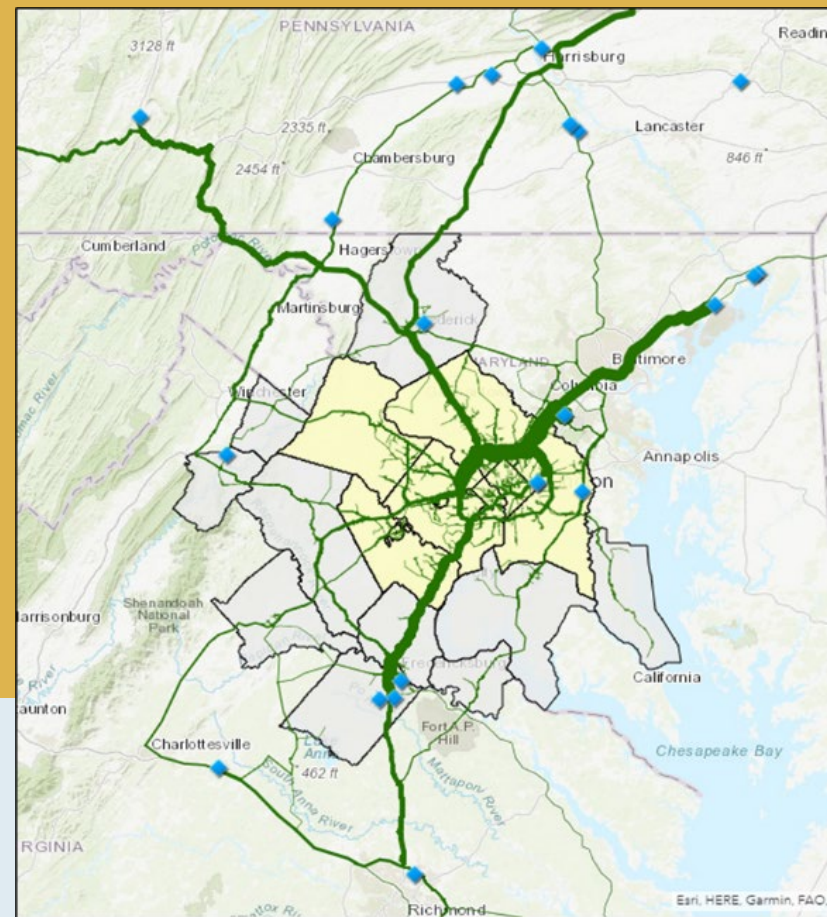
The majority of agricultural production, processing and major distribution centers are outside of the National Capital Region (NCR)



Midstream of the Food Supply Chain: Major Freight Transportation Pathways



Routing from distribution center to retail locations for a top grocery brand



Grocery routing for all brands by total market share served. Major distribution centers in blue.



Workshop Themes & Identified Challenges

WORKSHOP 1 KEY THEMES

- Efficient Coordination
- Waste Management
- Facility Security
- Map Sharing
- Direct Points of Contact
- Pausing E-Commerce

WORKSHOP 2 KEY THEMES

- Pre-Incident Coordination
- Restoration Prioritization
- Information Needs
- Grocery as Critical Infrastructure
- Waivers

WORKSHOP 3 KEY THEMES

- Waivers
- Information Sharing
- Resource Limitations
- Restoration of Supply Chain

WAIVERS

- Weight
- Time & Hours
- Other
- SNAP (Hot Meals)



Key Takeaways



A handful of grocery and supercenter locations provide the most meals to the District, so **reopening** them **is vital** post-incident.

Food and **Grocery** need to be treated as **critical infrastructure**

Expanding the local/regional food economy will improve resilience



Institutions like hospitals, correctional facilities, and shelters **must supply meals**, even during disasters.



Food insecure populations rely on **assistance programs**, but a meal gap still exists.



Private-Public Partnership Best Practices



Engage Early & Often

**Build a Symbiotic
Relationship**

**Develop Understanding
of Roadblocks**

**Assess their Needs &
Goals**

**Identify Information
Needs & Preferences
Early on**

**Identify Strong Points of
Contact**

**Critical Partners Should
be Treated as Such**



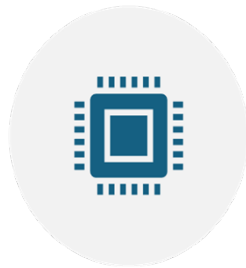
Examples of Real-World Private-Public Partnership



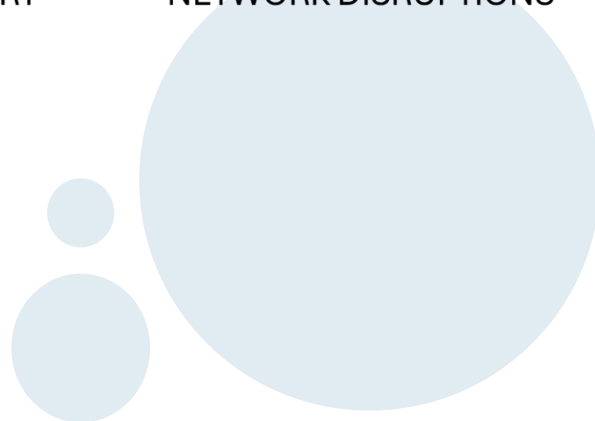
BALTIMORE KEY BRIDGE
COLLAPSE



DISTRICT-WIDE BOIL
WATER ADVISORY



CYBER INCIDENTS & IT
NETWORK DISRUPTIONS



DRAFT EXAMPLE EMAIL:

Following today's incident, we wanted to check in to identify operational needs we can assist with.

Event:

Date of Impact:

Background and Impacts:

Local Impacts:

- Traffic
- Goods & Services
- Fuel



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