

Annual Report Year 4 | Fiscal 2014 www.vtfarmtoplate.com

Prepared by



Vermont Sustainable Jobs Fund



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VERMONT'S FOOD SYSTEM

EXPLORE

CONSUMER DEMAND	FARM INPUTS	FOOD PRODUCTION	FOOD PROCESSING	WHOLESALE DISTRIBUTION
				fresh
RETAIL DISTRIBUTION	NUTRIENT MANAGEMENT	FOOD SECURITY	FOOD SYSTEM EDUCATION	WORKFORCE DEVELOPMENT
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TECHNICAL ASSISTANCE	FINANCING	RENEWABLE ENERGY	REGULATION	LEADERSHIP
a jul	\$			

farm^wplate: Year Four

To: Governor Peter Shumlin and Members of the Vermont General Assembly

If more of what we ate was locally or regionally produced, would this strengthen our local economy, create more jobs, and lead to greater food security for all Vermonters?

This is the question that led the Vermont Legislature to create the <u>Farm to Plate Investment Program</u> in 2009. Since then, many organizations have been aligning their activities around a common agenda – the <u>25 goals</u> laid out in the <u>Farm to Plate Strategic Plan</u>. We've built the <u>Farm to Plate Network</u> in order to collaborate on high impact projects, share market intelligence, dismantle bottlenecks, seize new market opportunities, and inspire new product development. And we've built the <u>Farm to Plate website</u> so that we can share all of the cool things that are happening in Vermont with the rest of the world and track our collective progress over time (using the <u>Results-Based Accountability</u> framework).

We want you to know that:

1 Vermont's food system is growing: From 2007 to 2012 (the last year this data was available) food system economic output expanded 24%, from \$6.9 billion to \$8.6 billion.

Farm to Plate serves as a network, platform, and venue to consider and incubate ideas and policies important to the future of our ag and food systems. It continues to be a model conversation emulated by other states and regions across the country. Vermonters have invested in this effort and it is paying dividends with new jobs and a stronger ag and food economy.

Chuck Ross, Secretary Vermont Agency of Agriculture, Food and Markets

- **2** Food manufacturing is a unique driver in Vermont: it's growing at a faster rate than overall manufacturing in Vermont and food manufacturing in the other New England states.
- **3** Many businesses are stepping up to source local food: For example, Sodexo spent \$3.2 million on local food in 2014, while the UVM Medical Center purchased \$1.8 million (2012). The Farm to Plate Network will next focus on independent grocery stores as the sweet spot for introducing more local food to consumers.
- **4** Act 148 has led to new relationships between state agencies, solid waste officials, and the food system: the Food Cycle Coalition is building relationships that will be critical to implementing the Universal Recycling law.
- **5** Vermont's food access community is innovating and collaborating to help food insecure Vermonters: the Foodbank, state agencies, and many community food security organizations are bringing fresh, local food to food insecure Vermonters and providing job training to underemployed and unemployed people.
- **6** The Farm to Plate Network develops tools and resources to strengthen Vermont's food system: land use planning, energy, and financing guidance documents, retail research, and more have been developed.

2014 FARM TO PLATE

NETWORK STEERING COMMITTEE AND NETWORK COORDINATORS

Chuck Ross, Secretary of Agriculture, Food and Markets

Jolinda LaClair, Deputy Secretary of Agriculture, Food and Markets (alternate)

Pat Moulton, Secretary of Commerce and Community Development

Lynn Coale, Vermont Agriculture and Forest Products Development Board

Stacy Burnstein, Vermont Food Funders Network

Tara Kelly, Chair, Aggregation and Distribution Working Group

Chris Howell, Co-Chair, Consumer Education and Marketing Working Group

Beth Cullen, Co-Chair, Consumer Education and Marketing Working Group (alternate)

Dan Smith, Co-Chair, Education and Workforce Development Working Group

Jonathan Kaplan, Co-Chair, Education and Workforce Development Working Group (alternate)

Nancy Everhart, Co-Chair, Farmland Access and Stewardship Working Group

Jill Arace, Co-Chair, Farmland Access and Stewardship Working Group (alternate)

Ela Chapin, Co-Chair, Production and Processing Working Group

Jackie Folsom, Co-Chair, Production and Processing Working Group (alternate)

Richard Berkfield, Co-Chair, Food Access Crosscutting Team

Linda Berlin, Co-Chair, Food Access Crosscutting Team (alternate)

Ellen Kahler, Executive Director, VSJF (ex officio)

Erica Campbell, Farm to Plate Program Director, VSJF (ex officio)

We thank the Vermont Legislature and the Shumlin Administration for making this work possible!

Vermont's food system continues to grow

» FOOD SYSTEM EMPLOYMENT ADDED **5,589** JOBS (**9.9%** INCREASE) FROM 2002 to 2013 **»** ADDED **4,189** JOBS (**7.2%** INCREASE) FROM 2009 to 2013



>> FOOD SYSTEM ESTABLISHMENTS ADDED **1,548 BUSINESSES (15.0%** INCREASE) FROM 2002 TO 2013 **>>** ADDED **665 BUSINESSES (5.9% INCREASE)** FROM 2009 TO 2013



Over 60,000 Vermonters are employed as farmers, waiters, cheese makers, brewers, bakers, butchers, grocery stockers, restaurateurs, manufacturers, and many other food related jobs. About 12,000 businesses are part of Vermont's food system. Vermont's food system has expanded faster than the rest of the state's economy over the past decade, and has appeared to recover from the Great Recession at a more robust pace. Total Vermont employment grew 2.5% from 2009 to 2013, while the number of businesses has slightly decreased.

..... » FOOD SYSTEM MULTIPLIER





Food manufacturing is a major economic driver

FOOD MANUFACTURING ADDED 326 BUSINESSES (77.3% INCREASE) AND 1,660 JOBS (36.4% INCREASE) FROM 2002 TO 2013 ADDED 209 BUSINESSES (38.8% INCREASE) AND 1,596 JOBS (34.5% INCREASE) FROM 2009 TO 2013

While total Vermont manufacturing shed jobs (over 8,700) and businesses from 2002 to 2013, **food manufacturing businesses increased by 77% and jobs increased 36%—the highest growth rates in New England!** Food manufacturing in Vermont also rebounded from the recession at a faster pace—businesses increased 39%, while employment increased 35%.



» Meat Slaughter and Processing

Processing challenges for farmers who raise livestock have evolved significantly in the past few years: **slaughter capacity has expanded from 56 facilities in 1997 to 72 in 2014** (several others in development). Educational workshops on farms and at processing facilities have increased communication and understanding of issues such as animal welfare, "finishing" animals, sanitation, seasonal and daily logistics of moving animals through processing, marketing finished products of different quality, cutting demonstrations, and legal requirements for Vermont and USDA-inspected facilities.

For three years, the Farm to Plate Meat Processing Task Force, led by the Agency of Agriculture, with active participation from NOFA Vermont, Vermont Housing and Conservation Board, Vermont Farm & Forest Viability Program, UVM Extension, Rural Vermont, Vermont Agriculture Credit Corporation, Vermont Agriculture Development Program, and private businesses, played a critical role in bringing key stakeholders together via:

- A series of workshops that leveraged processors as educators and focused on producer-processor partnership
- Learning journeys that brought supply chain partners to the Midwest, Southeast, and Italy
- Fechnical assistance and mentorship for meat processors
- Capital investment in processing infrastructure
- The development of a skilled meat cutters training program at Hannaford Career Center and Vermont Technical College
- Exploration and implementation of scale-appropriate IT systems
- Two successful New England Meat Conferences

"This synchronized effort by multiple partners proved to be a great match, and highly effective. As an Extension educator working with producers and processors, I am very pleased to say that the challenges have now largely evolved. We have more inspected processors in the state, and farmers are adjusting their systems to send more animals year round or during the off-peak times. Communication seems to be better all the way around. We have plenty of places for further improvement, but, I hear less frustration and I see more opportunity. It's been an honor to be some part of that through the F2P Meat Processing Task Force."

Jenn Colby, Pasture Program Coordinator, UVM Center for Sustainable Agriculture

The Sweet Spot: Local Food in Independent Markets

Over this past year, the Farm to Plate Network conducted research to better understand how we can get more local food into medium-sized independent grocery stores, coops, and country stores. Independent stores already carry a lot of Vermont products—and want more!



home took place at supermarkets and supercenters in 2013.

medium- to large-scale producers.

categories. Beer, wine, dairy, and bakery are "low hanging fruit" and

Opportunities exist to expand local food sales across all product

What has the Farm to Plate Network done to support local retail food sales?

<u>Goal 1</u> of the Farm to Plate Strategic Plan encourages increased consumption of local and regional food products in order to

- Increase the "farm share" of each food dollar going to farmers;
- Incentivize more local and regional food production;
- Increase local food access for all Vermonters and regional consumers;
- Support local retail businesses;
- Protect the working landscape; and
- Encourage healthy eating habits.

To achieve this goal, locally produced and processed food must be available through a wide variety of market channels and retail outlets. Several groups within the Farm to Plate Network—led by the <u>Intervale</u> <u>Center</u>, <u>UVM Center for Rural Studies</u>, <u>Vermont Retail & Grocers</u> <u>Association</u>, and two independent consultants, Annie Harlow and Clem Nilan—have been determining how best to increase sales of local food at independent grocery stores.

The project was implemented in two phases: a **statewide survey of independent retail stores** and **indepth local food assessments with six stores**. Many of the findings are very promising:

- A large percentage of independent retailers already carry local dairy, bakery, grocery, produce, beer, wine, and coffee products.
- 95% of survey respondents stated they would like to source more local food.



farm to plate Vermont's Independent Retailers

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Exploring the Next Frontier: Increasing Local Food Sales at

lower risk categories, but other categories such as produce, meat, and prepared foods are desired. Larger stores cited lack of consistent supply as their greatest barrier to purchasing more local food, while smaller stores reported they

need more consumer demand for local products.

Stores have point of sale systems but are not using them to generate movement reports; they mostly rely on institutional knowledge and assumptions about velocity based on their time spent on the sales floor. Stores may not be getting the information they need to know what is selling and what is not.

"We already source quite a bit of local food, but could sell even more at our three grocery stores. Our business would benefit from additional marketing support something to help create a greater buzz around Vermont grown food."

Mike Comeau, Richmond Market

NEXT STEPS:

- Develop a robust system of technical assistance and resource support for retailers (in procurement, brokerage services, point of sale systems, marketing, and merchandizing), aimed at increasing the amount of local food in their stores.
- Coordinate statewide consumer education campaign materials with retailers' need for consistent in-store local food products signage and marketing support.
- Expand regional market opportunities through Vermont's <u>domestic</u> <u>export program</u> and implementing <u>New England Food Vision</u>.

Universal Recycling in the Food System

Vermont's Universal Recycling Law addresses the diminishing capacity of the state's landfills to handle waste. By banning the disposal of all organics by 2020, Vermont will need to heavily rely on the capacity of the food system to meet its organics diversion goals. Using projections from DSM Environmental's Systems Analysis, we illustrate how organics could be managed by 2022.

Organics Management, Now 91,700 tons of organics disposed of in landfills 22% of waste stream

Organics Management, 2022



"The success of my business and the foundation of our environmental recovery in Vermont requires an understanding of how nutrients are managed throughout the food system—from the farmer's field to the consumer's plate. The Farm to Plate Network helps my business better understand the intricacies of the food system, and form deeper connections with the people, organizations, and ideas that help our business make more food available to more people."

Lisa Ransom, Grow Compost

One reason that edible food spoils or gets discarded rather than diverted to the highest and best use is that there's not enough distribution to get food from those who have it to those who need it. Grow Compost has taken a system's approach to their organics hauling to address this need. By outfitting its organics hauling trucks with refrigerated storage (funded by WLEB grant), Grow Compost can now pick up food that is then hauled to the Vermont Foodbank and local community food rescue organizations for statewide and local distribution.

39,700 tons of organics disposed of in landfills

5,471 tons of organics will be handled by residential backyard composting

13,326 tons of organics will be managed on-farm through feed for animals, composting, and anaerobic digestion









Grow Compost also hauls food scraps to their compost facility and to the anaerobic digester at Vermont Tech, ensuring that when food cannot feed people, it can still feed our animals, soils, and energy needs.

What have we done to support Universal Recycling in the food system?

The Food Cycle Coalition, a Task Force of the Farmland Access and Stewardship Working Group, has been active in bringing together solid waste management and food system stakeholders, building important relationships that will be critical to successfully implementing the Universal Recycling law and achieving



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Farm to Plate Goals <u>6 (improving environmental stewardship)</u> and <u>14 (improving nutrient management)</u>.

Through meetings, webinars, surveying, and strategic planning, the Food Cycle Coalition has become an important portal for solid waste officials and <u>Agency of Natural Resources</u> (ANR) staff to access and partner with food system organizations.

With many organizations grappling with how to coordinate and prioritize action around Universal Recycling, the Food Cycle Coalition embarked on an <u>Asset Mapping Project</u> (AMP) to build a common Universal Recycling agenda for food system stakeholders. The AMP included two components: a survey of food system organizations to identify their capacity to contribute to Universal Recycling implementation, and a strategic planning session to coordinate and prioritize the utilization of organizational assets. Participants came out of the AMP process with a better understanding for where they could collaborate to greatest effect, and food system organizations and solid waste management staff realized they had more to offer one another than they originally thought.

"I realized that there are a lot of organizations interested in solving the food waste problem and the solid waste districts can partner with them. We are not alone and I'm feeling much more positive."

Mary T. O'Brien, Southern Windsor/Windham Counties Solid Waste Management District

The Food Cycle Coalition has also played an important role in fostering closer ties between the food access community and the Agency of Natural Resources. It was through the Food Cycle Coalition that ANR decided to create a food access symbol and include food shelves in its <u>Materials Management Map</u>—a formal acknowledgment by ANR that Universal Recycling infrastructure is more than just transfer stations and compost facilities.

NEXT STEPS:

- Incentivize on-farm composting infrastructure: According to estimates by DSM Environmental, Inc. there is a compost processing gap of 58,788 tons between existing and needed composting infrastructure. On-farm composting could help close this gap, but critical infrastructure areas need to be identified and communicated to farmers along with the prospective costs and benefits of accepting food scraps for compost production.
- Continue to strengthen the connections between Universal Recycling and food rescue and access initiatives: DSM Environmental also estimates that from 2014 to 2022 an additional 1,592 tons of food scraps will be rescued from institutional sources. In 2013, the Foodbank estimated it rescued about 1,000 tons from Vermont enterprises and institutions. To meet DSM's projections, the state would need to increase food rescue by 159%.

Food Security in Vermont

The Great Recession (December 2007-June 2009) increased food insecurity in Vermont.



1999-2001 2001-2003 2003-2005 2005-2007 2007-2009 2009-2011 2011-2013

In 2014, the Farm to Plate Network re-dedicated itself to addressing food security issues in Vermont. The 2014 Annual Gathering featured presentations on how the network addresses inequality across the food system by Richard Berkfield (Food Connects), a data presentation from Dr. Linda Berlin (UVM), and personal stories from Kristin Hall, graduate of the Foodbank's Community Kitchen Academy, and Abel Luna of Migrant Justice.

As a result, there is more alignment amongst Food Access Cross-Cutting Team organizations



Click image to read the report.

and across the Network, and we're seeing the continued emergence of sophisticated program offerings from the charitable food system, community food security projects, and supplemental assistance programs. For example, the Vermont Foodbank distributed nearly 9 million pounds of food in 2014, including over 1.3 million pounds of produce. This is the first time the Foodbank has distributed more than 1 million pounds of produce and is a 45% increase over the previous year.



Cynthia Silva Parker of the Interaction Institute for Social Change speaks to the Farm to Plate Annual Gathering about systemic racism and the role of implicit bias in shaping inequitable opportunities and outcomes in the food system.

"The Annual Gathering food access and equity session was an eye opener for us at Black River. It made us ask questions about ourselves and the businesses that we work with everyday. It's not good enough to just promote local foods without looking at the social and economic impacts of doing so. If Vermont's farmers and businesses want to differentiate our brand and identity then we all have a deeper responsibility to our employees, our farmers, and our communities."

Sean Buchanan. President **Black River Produce/Black River** Meats

The Network is Generating New Resources



» Land Use Planning:

The historic decline in agricultural land in Vermont has seemingly flattened. Local planners and town officials can influence the long-term vitality of agriculture in their communities through a number of planning and regulatory mechanisms. How these mechanisms can effectively be applied to



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keep land in agriculture is increasingly complex with the emergence of new issues such as urban farming, agritourism, commercial composting, and new farm enterprises that don't neatly fall under the regulatory definition of agriculture.

To address the need for clear guidance on these issues-along with historically important issues like farmland conservation, farmland and taxes, and land use regulations—Farm to Plate's Agricultural Land Use Planning Task Force developed 5 online modules for planners and town officials:

1. Food System Planning	4. Local Land Use Regulations
2. Agricultural Land Conservation	5. State Land Use Regulations
3. Farmland and Property Taxes	

» Energy Success Stories

Direct and indirect energy costs have wide impacts throughout Vermont's food system. The eight Energy Success Stories in this report showcase farms, businesses, vendors, installers, and technical assistance providers that have made a difference with energy efficiency savings and renewable energy



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production (e.g., solar photovoltaics, digesters, wind turbines, and biomass).

Produced by the **Energy Cross-Cutting Team**, which includes the Agency of Agriculture, UVM Extension, Efficiency Vermont, and other technical experts, the Energy Success Stories were mailed to every dairy farm in Vermont.

» Financing Case Studies

A wide variety of financing options across the capital continuum are available to assist with the capital needs of Vermont's food system businesses. However, navigating through the multitude of financing options can be overwhelming.

The Financing Cross-Cutting Team convened a series of panels that illuminated financing options that different food system businesses have used and then wrote a series of case studies to exemplify how these businesses have found the right match of capital.



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Collective Impact

The **Farm to Plate Network** is organized around the <u>collective</u> <u>impact</u> framework, developed by John Kania and Mark Kramer in the *Stanford Social Innovation Review*, meeting the following five conditions:



Farm to Plate Network Survey

Survey results from the second biennial Farm to Plate Network Survey demonstrated that the majority of Network members derive clear value from their participation in the network. 76% of members agree or strongly agree that Farm to Plate is helping to advance their organization's own goals,



2014 Farm to Plate Annual Gathering

74% agree or strongly agree that new relationships have formed over the last year due to participating in Farm to Plate, and 78% agree or strongly agree that participating in the Network has helped strengthen existing relationships.

Businesses continue to be active participants in the Network representing about one-quarter of survey respondents, and through Network participation businesses reported forming 108 new organizational relationships. These results point to the Network's ability to broadly disseminate information to the private sector and affect private sector decision making, and generally influence market development.

"It is exciting to see the "movement" that has emerged from the Farm to Plate work. The brand recognition, the collaboration, and the resulting economic impacts are wonderful. We really are leading in this area in Vermont because of the hard work of all the participants."

Patricia Moulton, Secretary Agency of Commerce and Community Development

Working Lands Investments are Key to the Success of Farm to Plate

2014 RECIPIENT	PURPOSE	AMOUNT	SUPPORTS FARM TO PLATE GOAL	
Boyd Family Farm, Wilmington	Barn renovation	\$20,000	1	7
Brattleboro Area Farmers' Market	Site acquisition and expansion of the farmers' market	\$30,000	1	13
Rockledge Farm, Weathersfield	Website development and marketing	\$20,000	1	13
North Williston Cattle Company, Essex Junction	Equipment to reclaim prime agricultural land	\$10,000	5	7
Bouchard Farm, St. Albans	Equipment and materials for organic dairy cow housing	\$9,750	7	8
Windfall Orchard, Cornwall	Cider presses and equipment	\$9,750	7	11
Fat Toad Farm, Brookfield	Efficient caramel production equipment	\$15,000	7	11
Bonnieview Farm, Albany	Cheese aging cave to double production	\$20,000	7	11
Cate Hill Orchard, Greensboro	On-farm cheese processing facility	\$20,000	7	11
Kingdom Brewing, Newport	Retail bottle/cannery and growler fill station	\$20,000	7	11
Screamin' Ridge Farm, East Montpelier	Processing facility for value-added agricultural products	\$50,000	7	11
VT Food Venture Center / Mad River Food Hub	Equipment Access Program for Vermont value added processors	\$50,000	7	11
North Hollow Farm, Rochester	On-farm USDA inspected meat processing plant	\$24,380	7	11
Big Picture Farm, Townshend	Materials for caramel production and cheese production facility	\$20,000	7	11
Rogers Farmstead, Berlin	Equipment to expand grainery capability	\$20,000	7	11
VT Livestock and Processing	Computerized weight data and tracking system for livestock	\$38,000	7	11
Doolittle Farm, Shoreham	Egg washing equipment	\$14,203	7	13
Snug Valley Farm, East Hardwick	Improving delivery of pigs and pork products	\$20,000	7	13
UVM Center for Sustainable Agriculture	Swine industry development	\$27,939	7	16
VT Sustainable Jobs Fund	Assistance to producer and processor association capacity	\$20,000	7	19
Jericho Settlers Farm, Jericho	Heated tunnels with biomass furnace to expand winter vegetable production	\$18,200	7	22
Wilcox Ice Cream, Manchester	Manufacturing facility	\$20,000	8	11
Vermont Technical College	Dairy processing plant and hub	\$75,000	8	16
DairyVision Vermont	Technical service effort empowering dairy farmers	\$50,000	8	19
Lazy Lady Farm, Westfield	Solar array for off-grid dairy	\$6,000	8	22
Elmore Roots Fruit Tree and Berry Nursery, Elmore	Kiosks to expand accessibility of product	\$12,000	9	13
The New Farmer Project	Assistance for agricultural entrepreneurs	\$50,000	9	19
VT Housing and Conservation Board	Business assistance for food and forestry enterprises	\$118,337	9	19
UVM	Hard cider market expansion analysis	\$40,000	11	16
Grow Compost of Vermont, Moretown	Long-range strategic plan to assist compliance with Act 148	\$75,000	14	19
	TOTAL	\$923,559		

Farm to Plate Investment Program Financial Report

Actual Revenue and Expenses July 1, 2013 - June 30, 2014 (FY14)

Revenue	Received to Date	
Private Foundations	\$345,504	
State of Vermont	\$138,739	
F2P Gathering Registration	\$29,834	
Corporate Contributions	\$30,397	
Total Revenue Received	\$544,474	

Expenses	Expenses to Date
General F2P Operations	
Administration	\$35,126
PR/Marketing/Outreach	\$8,147
Travel	\$9,626
Total F2P General Operations	\$52,900
F2P Personnel	\$220,308
F2P Projects	
Plan Chapter/Case Study Writing	\$4,550
Food Systems Atlas Development	\$113,967
Farm to Plate Network Meetings/Gathering	\$72,122
Working Group/Task Force Chair Stipends	\$50,768
Network Member Stipends	\$8,238
F2P Network Grants	\$11,650
Dairy Technical Assistance Survey	\$5,000
On-Farm Energy Case Studies Project	\$5,152
Total F2P Project Operations	\$271,446
Total Expenses	\$544,654

Farm to Plate Investment Program Revenue



Farm to Plate Investment Program Expenses



The VSJF and the Farm to Plate Network Steering Committee are extremely grateful to our funding partners who help to fund the work of the Farm to Plate community and are actively engaged in various projects within the Network. Their ongoing support allows us to find creative solutions to complex problems, and grow a stronger, healthier, more prosperous food system in Vermont and the region.

Vermont Agency of Agriculture, Food and Markets • Vermont Agency of Commerce & Community Development • John Merck Fund • Henry P. Kendall Foundation • Vermont Community Foundation • Sandy River Charitable Trust • Keurig Green Mountain • Jane's Trust Foundation • Anonymous foundation



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