

Farm to Plate Retrospective 2010-2020

Joint Presentation to Senate
Agriculture and House
Agriculture and Forestry
Committees

February 23, 2022

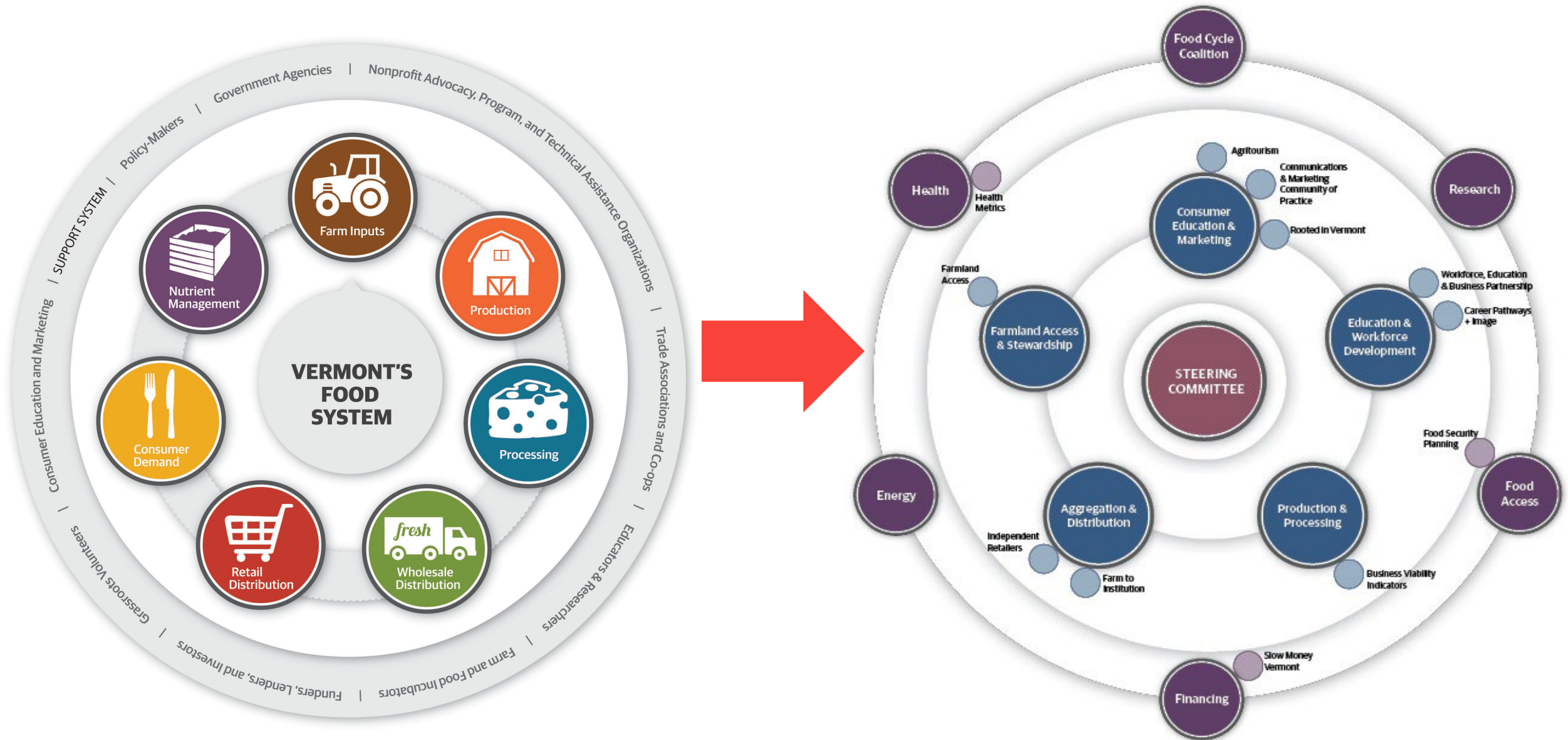


Farm to Plate Investment Program: The Process and Theory of Change

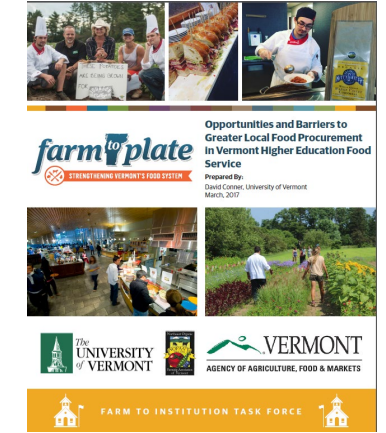
- 1** Increase economic development in Vermont's food and farm sector.
- 2** Create jobs in the food and farm economy.
- 3** Improve access to healthy local foods.



The Original Plan and Network



The Farm to Plate Network: From Plan to Action



How Well Did The Network and VSJF Do?

Between 2014-2020...

91-93%

Said they valued the information sharing provided through the Network

88-94%

Said they valued the networking opportunities provided through the Network

79-96%

Said the Network helped to make existing relationships stronger

74-94%

Said the Network helped build new relationships

76-88%

Said the Network helped their organization reach its own goals

85-98%

Said VSJF was effective in coordinating the Network

"Farm to Plate [Network] has provided an accessible venue for groups like Food Connects to engage in valuable cross-sector relationships that have resulted in significant changes in how we work to accomplish our mission. Farm to Plate has helped us build our own organizational capacity by asking better questions, developing stronger relationships and delivering more relevant programming for a larger impact. Farm to Plate makes us smarter."

Richard Berkfield, Executive Director, Food Connects

Results Part 1 - How Well Did We Do in Implementing Strategies From the Plan?

COMPLETION STATUS	NUMBER*
Priority strategies fully completed by F2P Network	7
Priority strategies currently underway or partially completed by F2P Network	14
Priority strategies fully completed by other entities, not as a F2P project	10
Currently underway or partially completed by other entities, not as a F2P project	29
Decided to not complete	5
Not acted on	6

- 79.7% (43/54) of High Priority Strategies were either fully completed, or are strategies still underway or partially completed at this time
- 20.3% (11/54) of High Priority Strategies were either not completed because initial planning or research revealed the project to be infeasible or the strategy irrelevant due to changing conditions (9.2%): OR, there was no action taken and the strategy could still be valuable to implement (11.1%)

Note that some high-priority strategies contained multiple parts, some of which were completed/begun through the Farm to Plate Network, and others of which were completed/begun by other entities, and were counted in both of those categories, so these counts add up to more than the 54 distinct strategies.

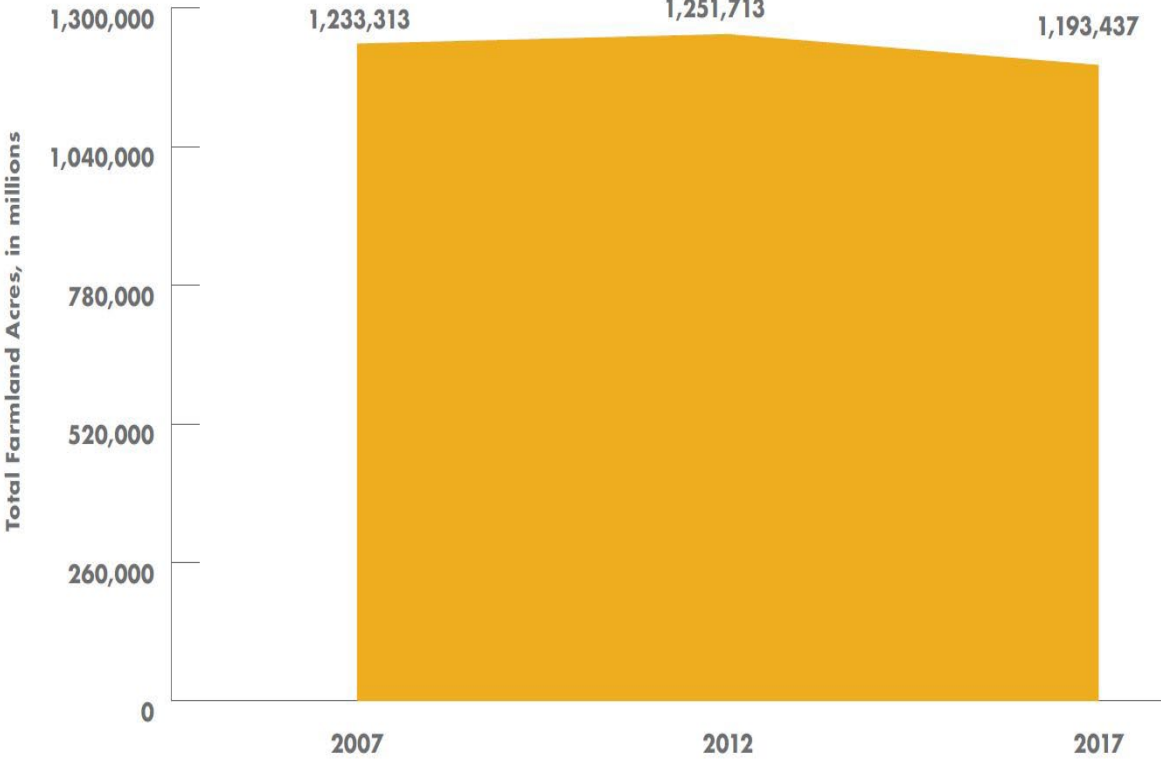
Results Part 2 - Is Vermont Better?

At the Macro Level:

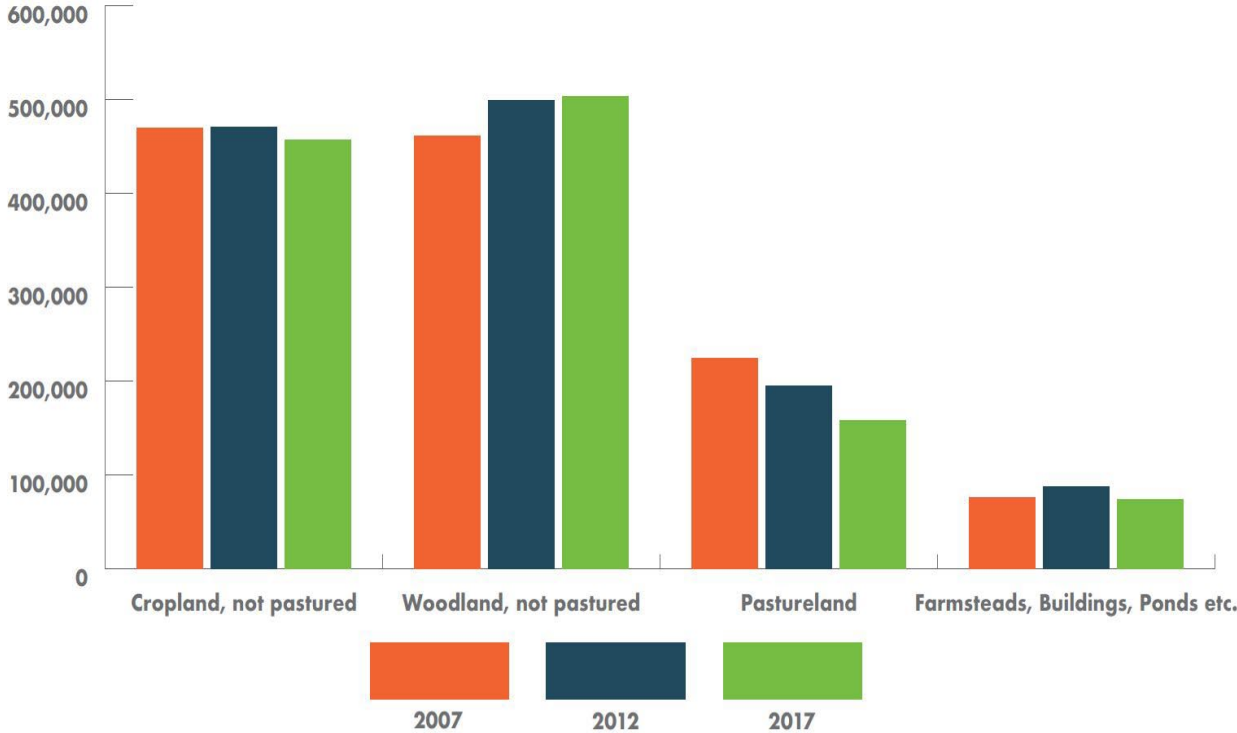
- Vermont's food system economic output expanded **57.7%**, from **\$7.599 billion to \$11.985 billion**.
- Pre-COVID food system **employment (2011-2019) increased 11% or 6,189 net new jobs**; more than **65,000 Vermonters** directly employed by over **11,500 farms and food-related businesses**.
- Local food purchases rose from **\$114 million to \$412 million**, going from **5% to 17.8%** of the total amount spent on food in the state annually.
- The household food insecurity rate **declined from 2010-2020**. **8.6%** of Vermont households faced food insecurity in 2020, down from **13.8%** in 2010. However, research conducted by the National Food Access and COVID Research Team reveals **substantially higher food insecurity rates over 2020-2021, ranging from 27%-29%**

Results - Is Vermont Better? Land

Vermont Land in Agriculture, 2007-2017

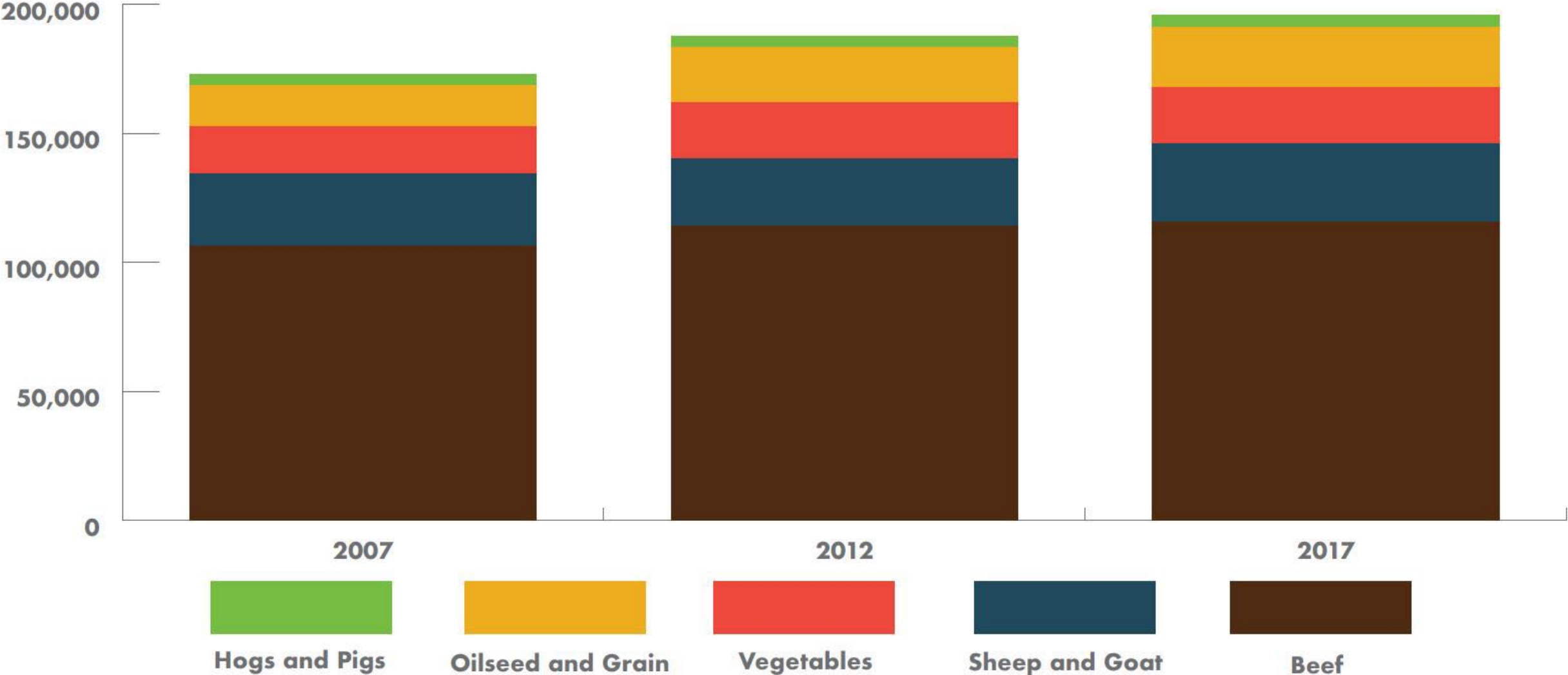


Land in Agriculture by Farm Acreage Type, 2007-2017

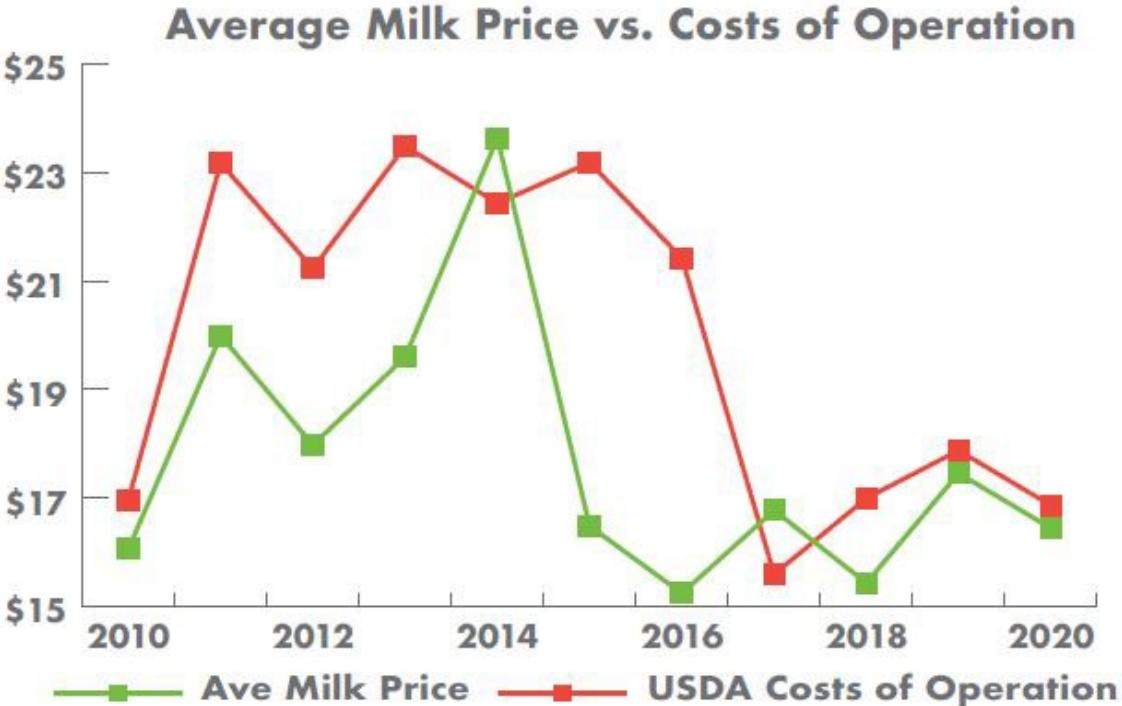
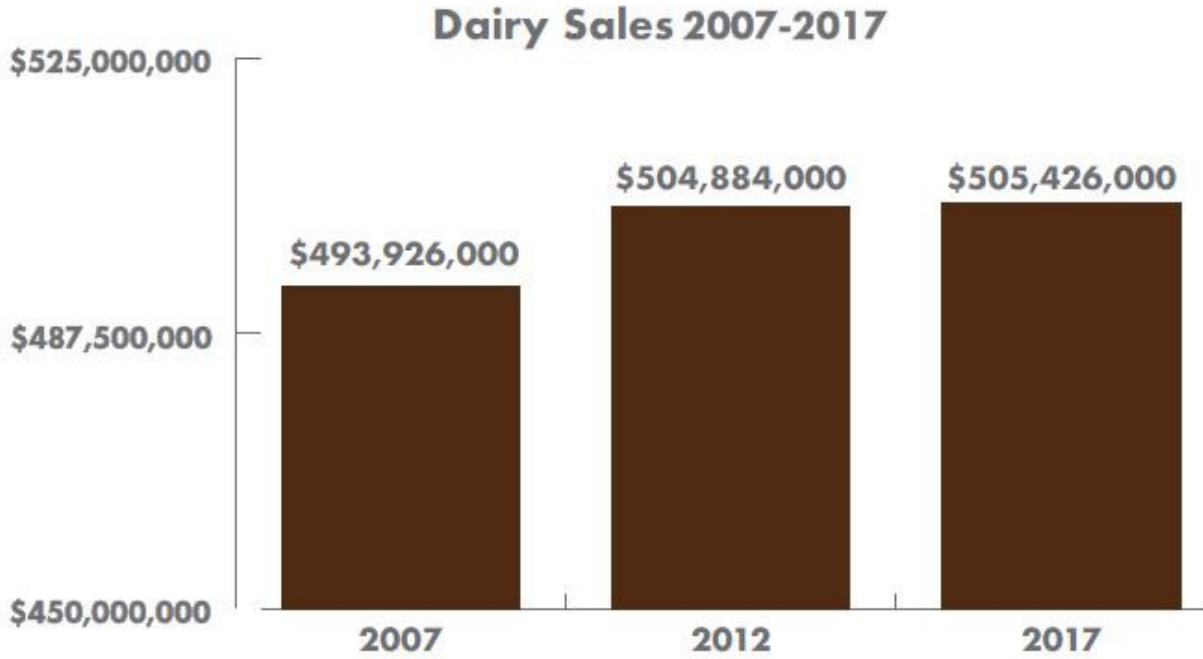


Results - Is Vermont Better? Land

Land in Agriculture for Select Non-Dairy Categories, 2007-2017



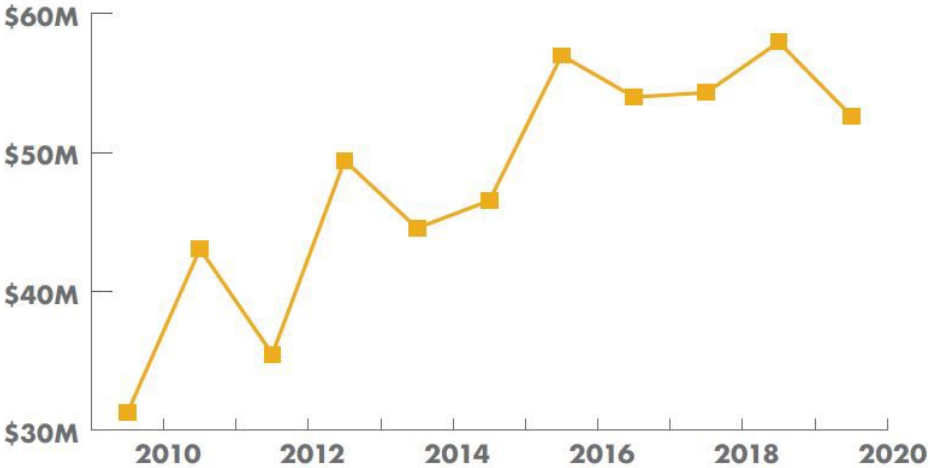
Results - Is Vermont Better? Production and Processing - Dairy



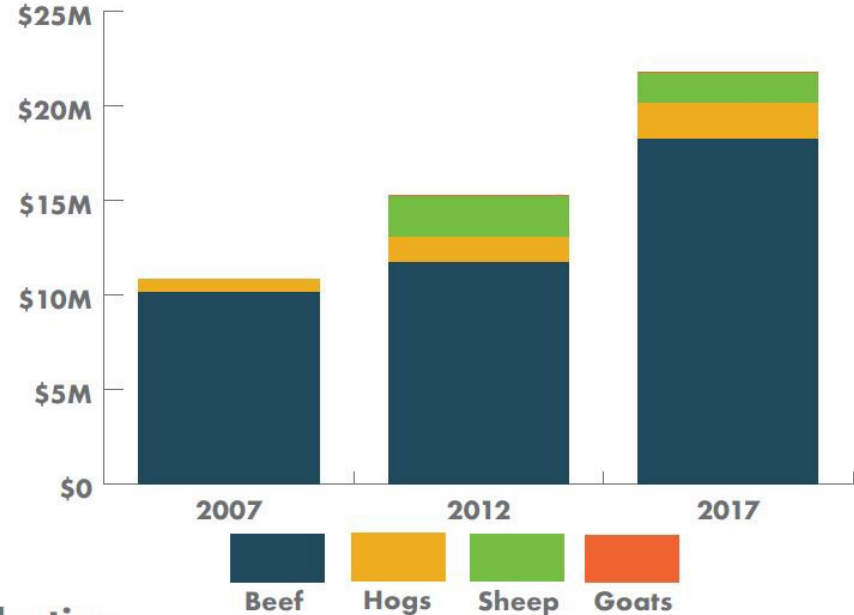
133% increase in the number of dairy processing plants from 2010-2020

Results - Is Vermont Better? Production and Processing - Maple, Vegetables, Meat

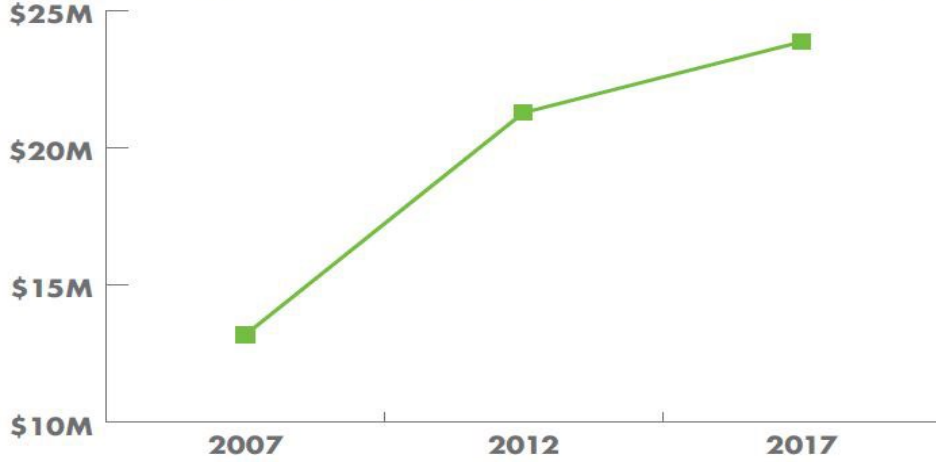
Maple Production Value



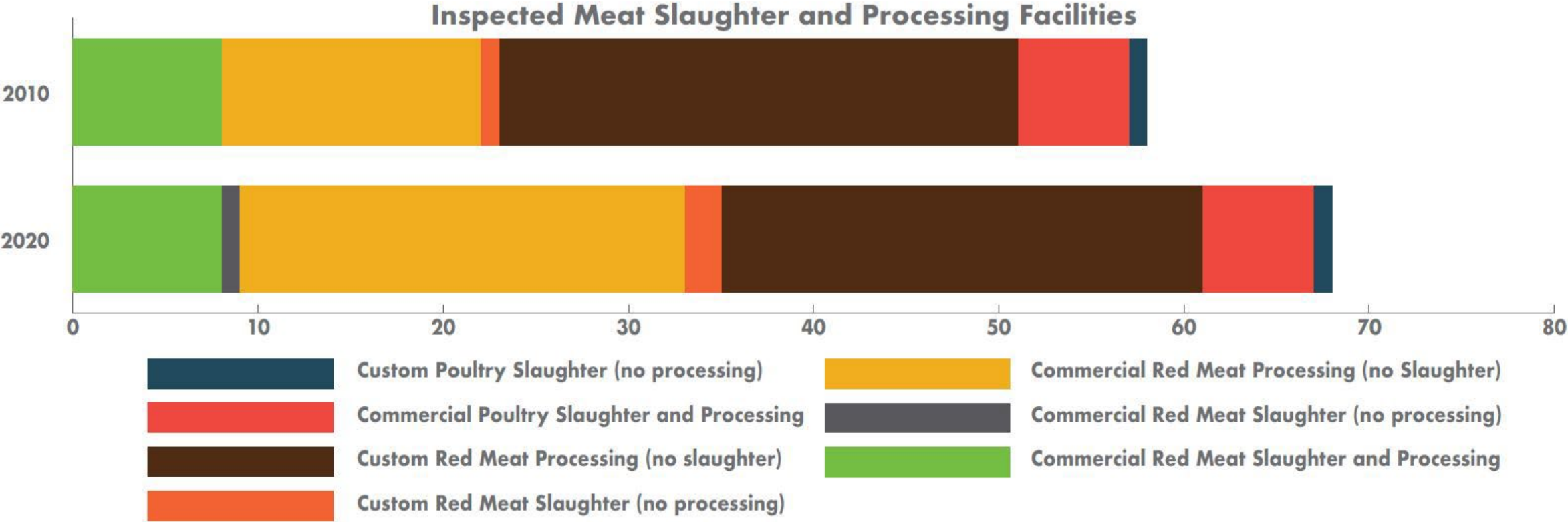
Meat Sales 2007-2017



Vegetable Farming Value of Production

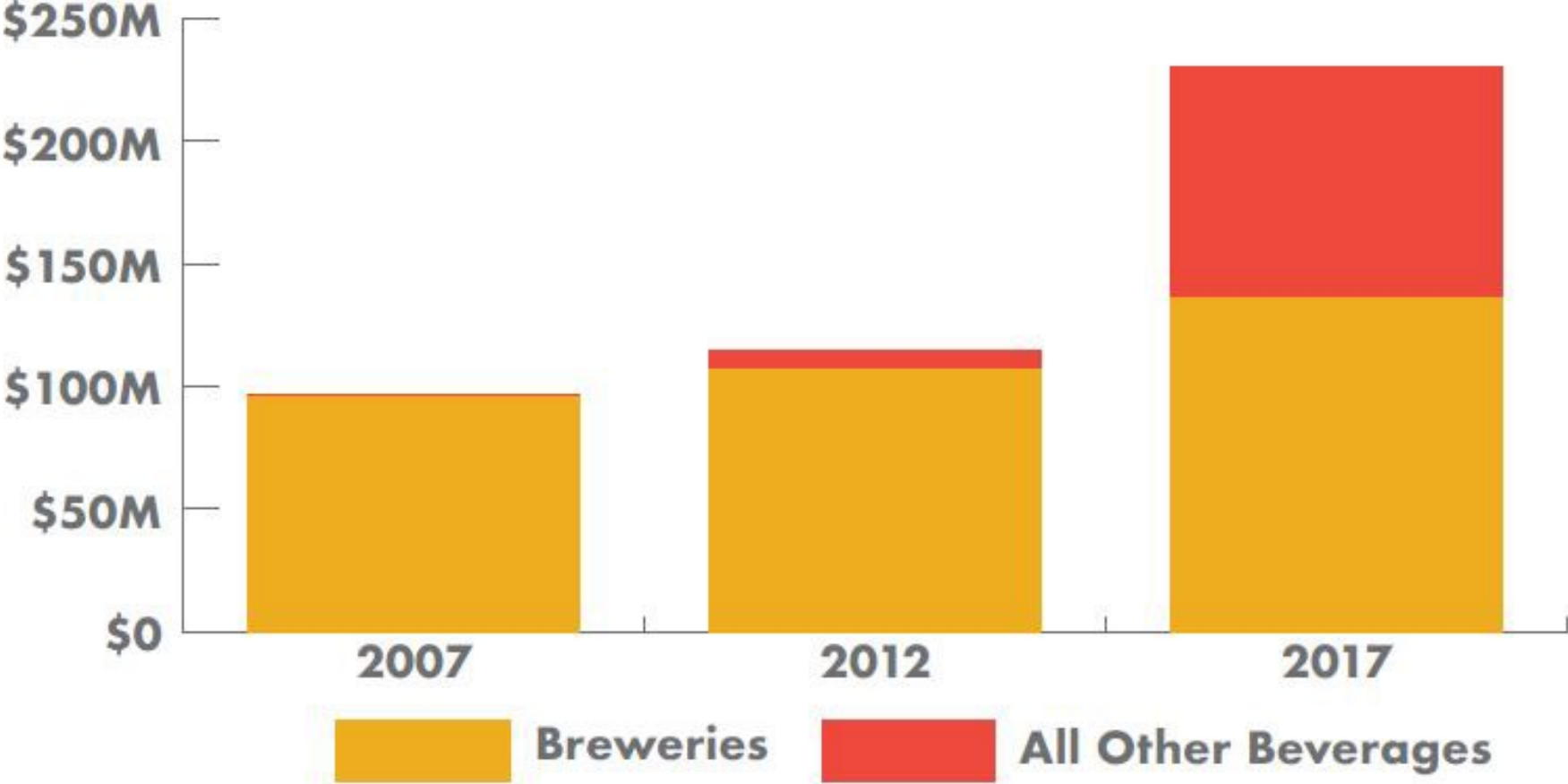


Results - Is Vermont Better? Production and Processing - Maple, Vegetables, Meat Cont...



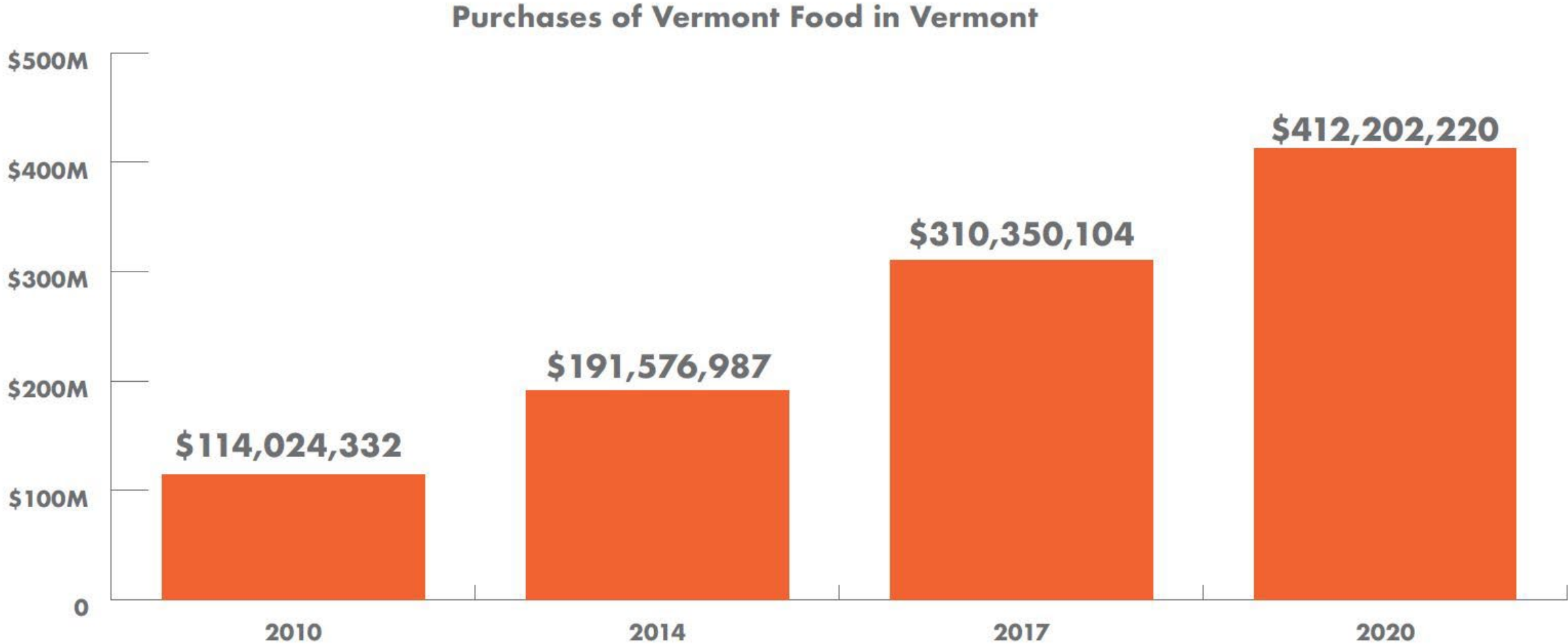
Results - Is Vermont Better? Production and Processing - Beverages

Beverage Manufacturing Sales



**139%
Increase!**

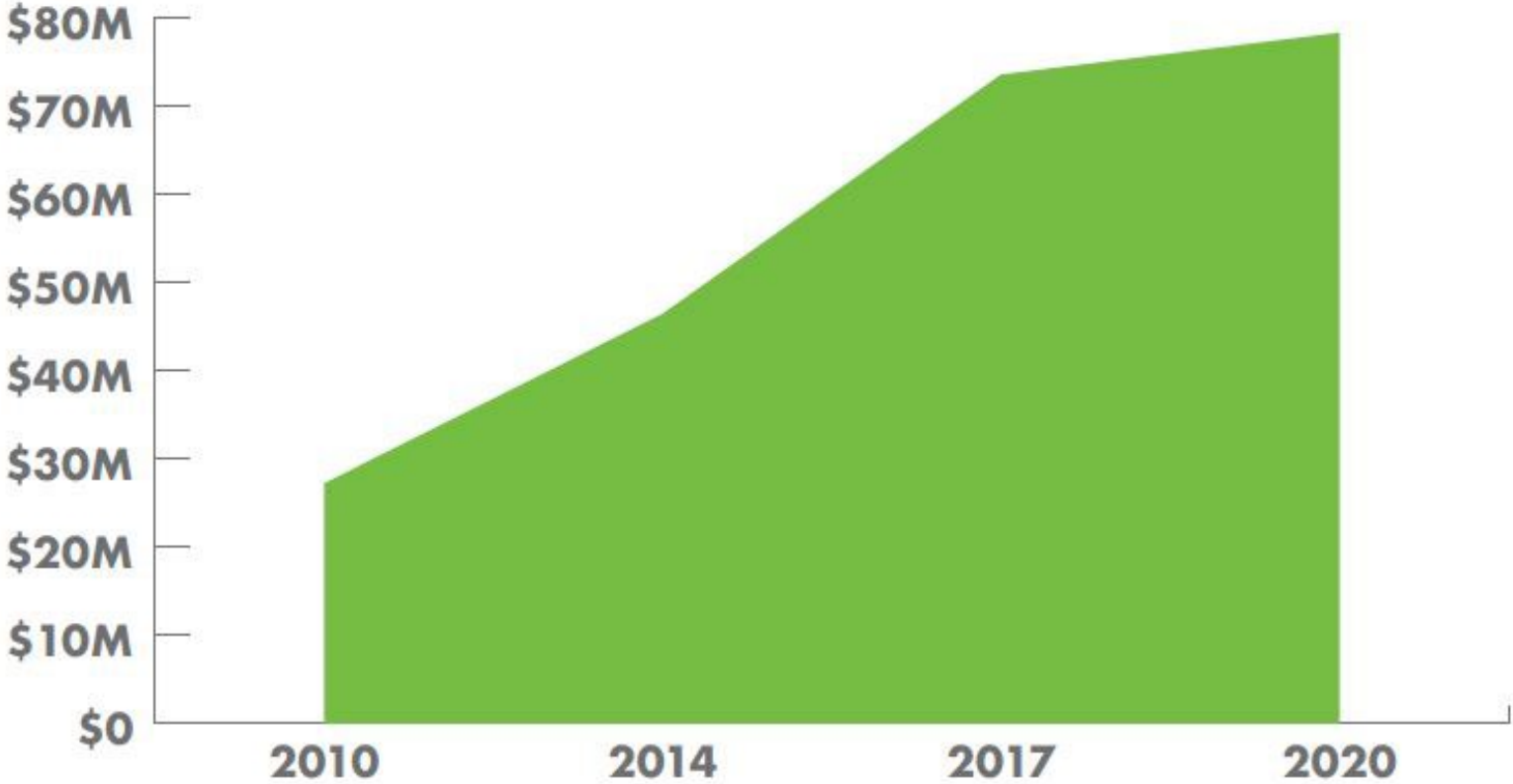
Results - Is Vermont Better? Sales of Local Food



From 5% of total in-state food purchases in 2010 to 17.8% in 2020; a \$298 million increase!

Results - Is Vermont Better? Sales of Local Food

Direct to Consumer Food Sales, Farm and Food Processors Combined 2010-2020

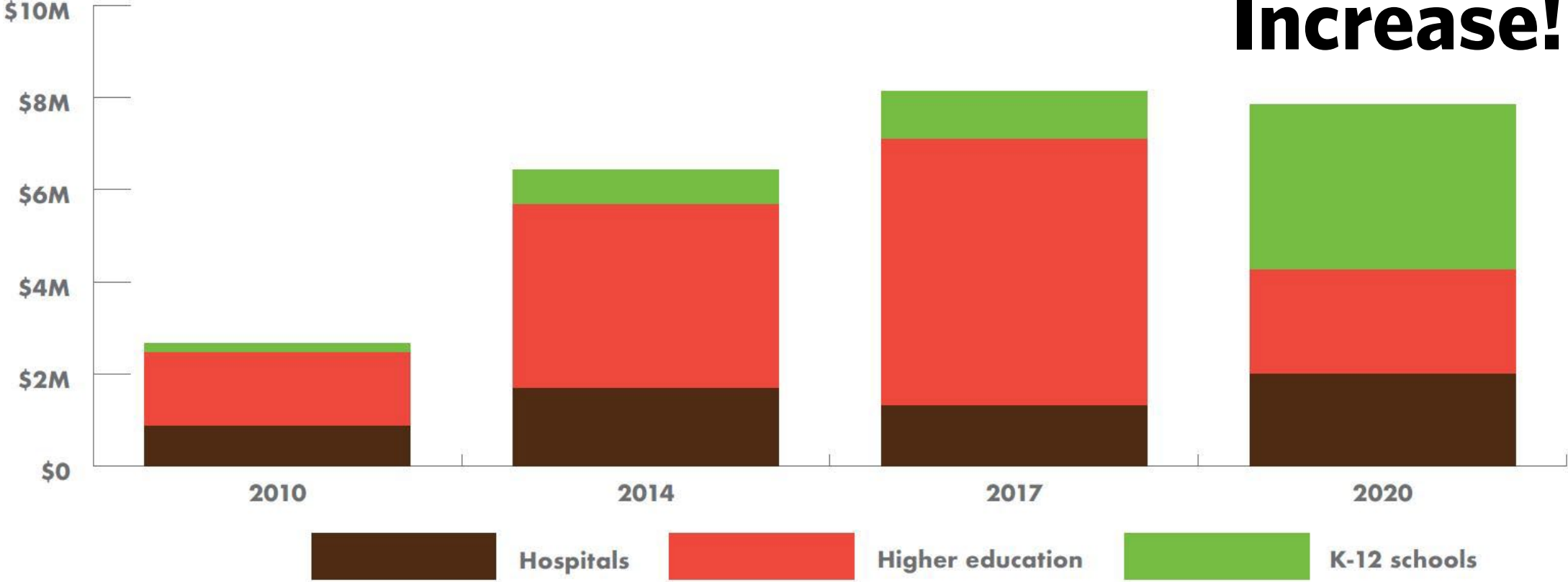


**179%
Increase!**

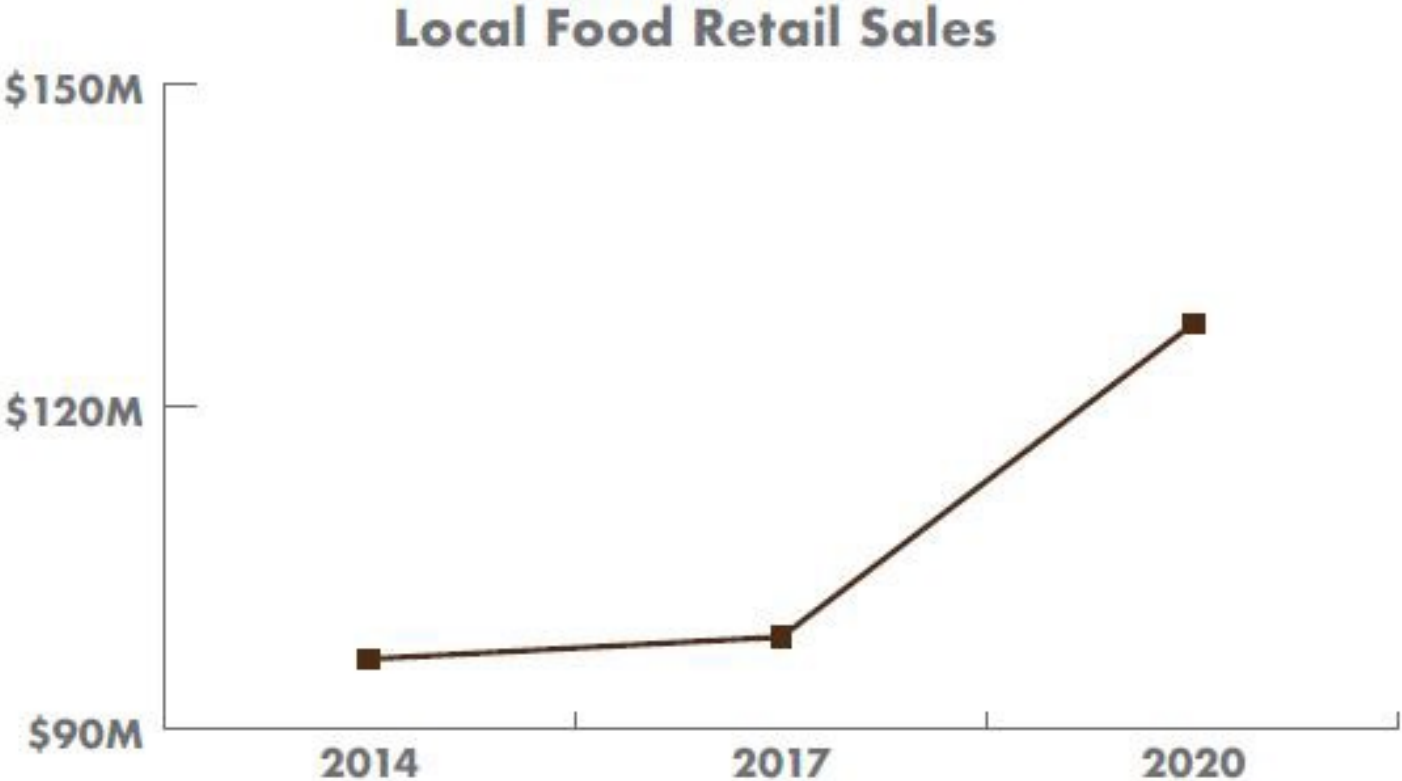
Results - Is Vermont Better? Sales of Local Food

**193%
Increase!**

Instititunal Sales 2010-2020



Results - Is Vermont Better? Sales of Local Food



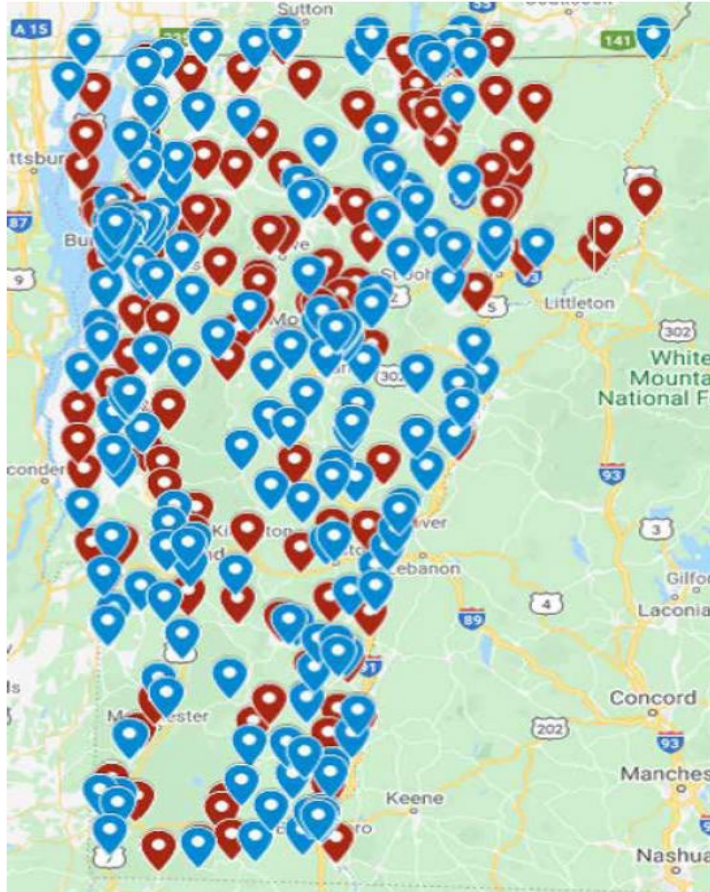
**32%, or
\$31 million
Increase!**

Results - Is Vermont Better? Sales of Local Food

Market Channel	2020 Sales
Institutions	\$7,841,034
Restaurants	\$30,808,797
Direct Markets	\$78,351,595
Retail Grocery Stores	\$127,704,021

Results - Is Vermont Better? Education & Workforce

Vermont Schools supported to date by Vermont FTS Grant Program



Blue pins indicate schools that have received state Farm to School funding; while red pins are schools that have not yet. Approximately half of schools have received support to date (exact accounting is complicated by recent school consolidations).

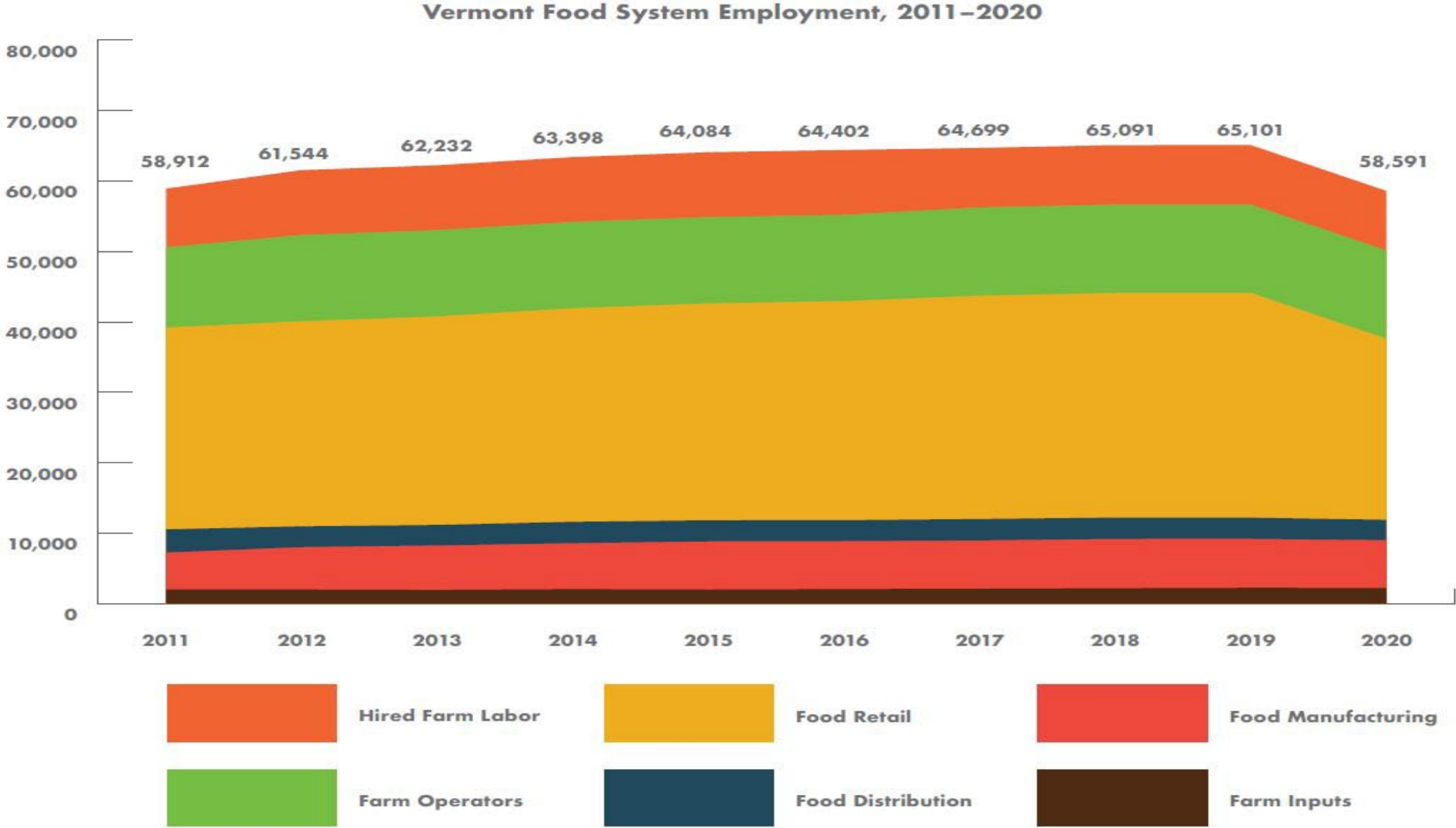
In 2018:

- 65% of VT schools connect with local farmers or farms and
- 61% integrated farm to school into the curriculum

Additionally between 2013-2021:

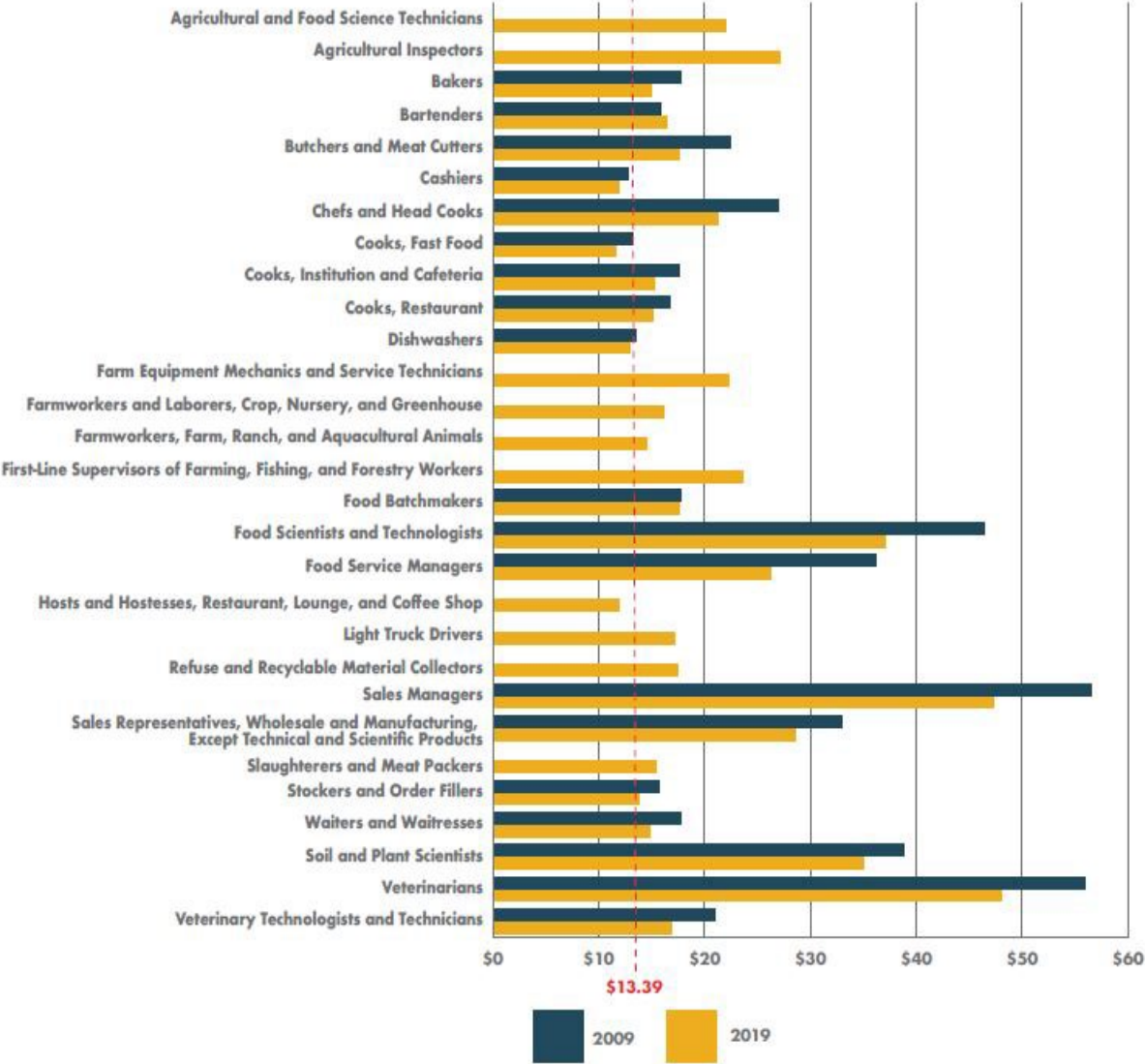
- The total number of CTEs offering forestry or natural resources programs increased from 11 to 13
- The total number of CTEs offering agriculture programs from 3 to 5
- The total number of CTEs offering culinary arts from 12 to 15

Results - Is Vermont Better? Education & Workforce

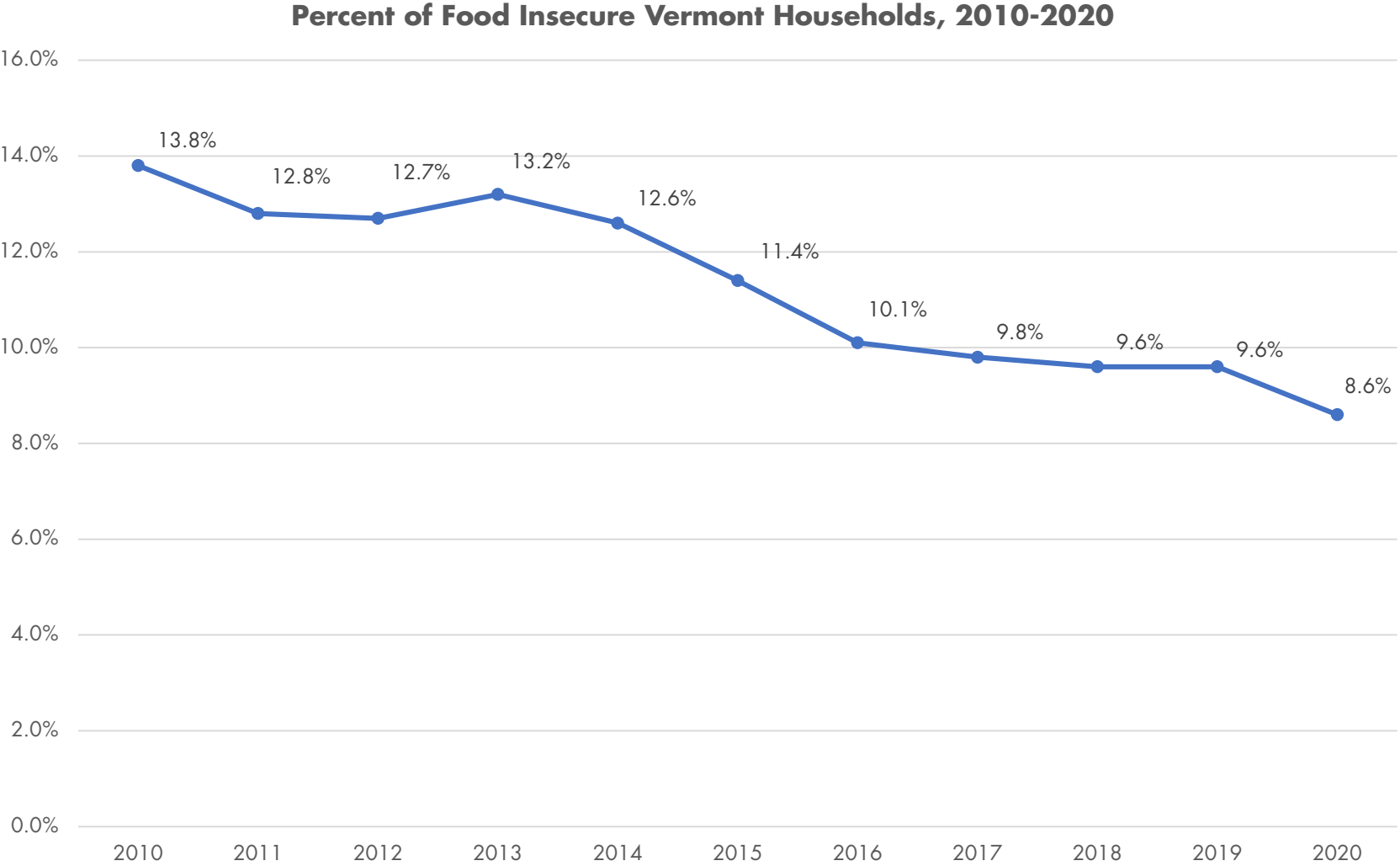


Results - Is Vermont Better? Education & Workforce

Median Hourly Wages for Select Careers, 2009 vs. 2019 (adjusted to 2019 dollar)



Results - Is Vermont Better? Food Access



But...questions about how food insecurity has been measured by USDA during the pandemic. Focused Vermont research by NFACT has revealed:

- 29% of Vermont households were food insecure at some point between March and September 2020
- Most recent sample in Spring 2021 found 27% of households in Vermont were food insecure

Next Steps - What to look for in the 2021-2030 Plan, and what F2P will be focused on in the next decade

- **Dairy:** Priority Strategies 5, 7, 8, and 11 offer ways to stabilize and revitalize the dairy industry, in a holistic way that is inclusive of growing segments in cheese and value-added products, by increasing capital investment in processing, storage, copacking, marketing and product differentiation, supply chain development, and technical assistance.
- **Other Ag-Industries Development:** Priority Strategies 1, 6, 7, 8, 9, 10, 11, 12, 14, 15, 16, 17, 20, 29, 30 all speak to how Vermont can diversify its production portfolio by supporting robust industry and supply chain development.
- **Food Access and Security:** Priority Strategies 21, 22, 24 recommend appropriation for a new Local Food Access Funding Program, increased funding for proven ways to alleviate food insecurity that also incorporate more local food, and the development of a state Food Security Plan to ensure that households, communities, markets, and the state as a whole are prepared to effectively and efficiently respond to global or national food supply chain disruptions.

Next Steps - What to look for in the 2021-2030 Plan, and what F2P will be focused on in the next decade

- **Environment and Resiliency:** Priority Strategies 25, 26, 27, and 28 address how to enhance climate resilience in the food system while incentivizing practices and management that enhance ecosystems and improve soil and water quality.
- **Education and Workforce:** Priority Strategies 18, 19, 31, and 32 recommends: redesigning the state education model to provide Career and Technical Education centers with independent funding streams; creating and funding legislation to support workforce pipeline educational programs; supporting and expanding existing farm and food educational programming; providing livable wages and improving workplace conditions through policy, shared workforce programs, market incentives, and technical assistance; and reforming U.S. immigration and labor laws and rules.
- **Racial Equity:** Priority Strategies 2, 3, 9, 13, 32 33, 34 of the 2021-2030 Plan directly speak to recommendations to address systemic racism and racial equity in the food system through financing, funding, land access, trainings, immigration reform, support and allyship to BIPOC representation, leadership, and organizations, and more in-depth research and data collection investigating racial equity in the Vermont food system.

Questions & Thanks!

Final Report will be sent the week of Feb 28-March 4 and available at vtfarmtoplate.com