

farm to plate



STRENGTHENING VERMONT'S FOOD SYSTEM

Annual Report
Year 5 | Fiscal 2015
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Vermont Sustainable Jobs Fund

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Food and Markets

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Farm to Plate is administered by the Vermont
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YEAR FIVE

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

It hardly seems possible that 5 years have passed since we first released the *Farm to Plate Strategic Plan*, at the request of the Vermont Legislature. Embraced by the newly elected Shumlin Administration, \$500,000 was included in the 2011 Jobs Bill that year to support the Plan's initial implementation. Passage of the *Working Lands Enterprise Initiative* in 2012 further demonstrated a commitment to food system economic development. Since Farm to Plate's launch, a *Network* of over 350 businesses, nonprofit organizations, government agencies, capital providers, and educational institutions have been collaborating and aligning their activities in support of the Plan's *25 goals* to strengthen Vermont's food system.

Vermont should be proud of creating the preeminent food system plan in the United States. We've harnessed the power of networks and created circles of trust across the state to pursue new opportunities and tackle long-standing problems. We've developed a comprehensive data collection, analysis, and visualization system for tracking progress. **This 5 year summary highlights where we've been, where we are, and where we're going to reach Vermont Farm to Plate's goals by 2020.**

It is with deep gratitude that we thank the Shumlin Administration and the Vermont Legislature for their abiding financial and moral support over the past 5 years.

Ellen Kahler
Executive Director
Vermont Sustainable Jobs Fund

Chuck Ross
Secretary
Vermont Agency of Agriculture,
Food and Markets

Pat Moulton Powden
Secretary
Vermont Agency of Commerce
and Community Development

2015 STATE OF VERMONT'S FOOD SYSTEM

REGIONAL TRENDS: The Farm to Plate Network includes representatives from each region of Vermont and Network activities have dramatically increased relationships across the state. For Farm to Plate to succeed, each region of Vermont must have a better understanding of the broader statewide initiative and the Network needs to have a better understanding of specific problems and opportunities within regions. Many of the goals of the Vermont Farm to Plate Strategic Plan may be best implemented at a regional level.

Going forward, our goal is for regions to be more coordinated in their effort to strengthen and grow their food system, and to be more coordinated with other regions and statewide efforts.

ENVIRONMENTAL TRENDS: Acts 148, 64, and 56 require paradigm shifts in nutrient management, water quality practices, and renewable energy generation that change the way we manage resources and how we conduct business. Many food system organizations in the Farm to Plate Network are already engaged in this groundbreaking work in a cooperative fashion (e.g., through Farm to Plate's Food Cycle Coalition, Agency of Natural Resources staff are working with food rescue efforts being expanded by the Vermont Foodbank and other organizations).

Going forward, we need to protect and incentivize the sustainability of our natural systems, particularly as we prepare for, mitigate against, and adapt to the challenges presented by climate change.

ECONOMIC TRENDS: Farm to Plate has firmly established that food system development is fundamental to Vermont's economy. Vermont generates the highest sales from agricultural production in New England and Vermont maple syrup, cheese, ice cream, and beer are in high demand nationally. We've witnessed sustained growth in food system sales, jobs, and businesses, and increases in value added food manufacturing, financing opportunities, and supply chain connections.

Going forward, we need to focus more closely on improving farm viability, expanding non-dairy food production, and increasing the balance and diversity of food system companies (e.g., 2% of farms accounted for 37% of sales in 2012; Keurig Green Mountain alone accounts for a major percentage of food manufacturing sales).

SOCIAL TRENDS: Consumer preferences have decisively moved away from artificial ingredients and highly processed food in favor of healthy, local food—and many Vermont businesses are taking advantage of this trend. At the same time, the effects of the Great Recession persist: 10.2% of Vermont households were food insecure at the start of the recession compared to 12.6% today—more than 32,000 households.

Going forward, we need to support the continued evolution of the charitable food system and increase local food availability where the majority of people shop. We need to spend more time connecting our food system to our health care system in order to address health trends (e.g., obesity) that are moving in the wrong direction.



ECONOMIC TRENDS

The *Vermont Comprehensive Economic Development Strategy* calls for preserving our working landscape by ensuring a healthy business environment that enables food system businesses to succeed. Coming out of the *Great Recession*, economic trends demonstrate sustained increases in food system sales, jobs, businesses, value added manufacturing, and Vermont's overall contribution to New England's food system.

1 ↗ Food System Gross Sales Are Up 32%

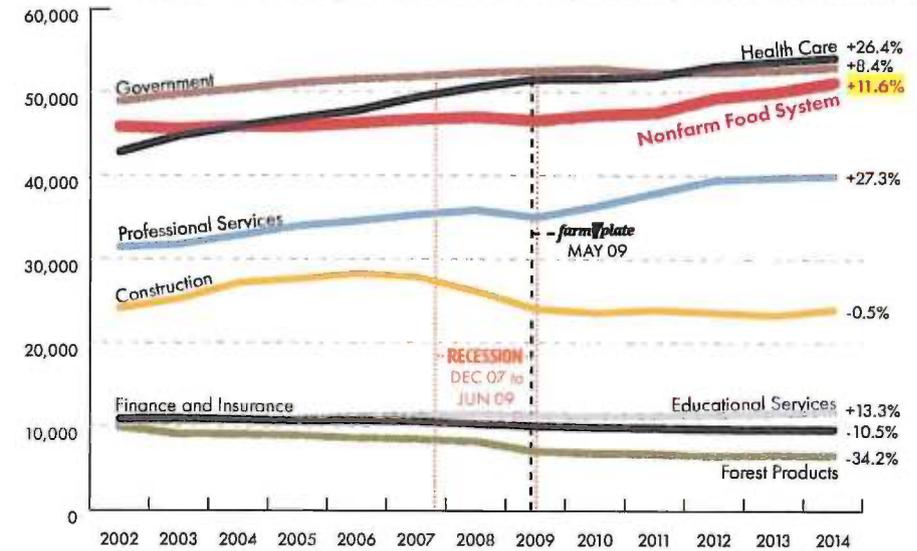
Revised estimates from the latest available year of data for all sources shows a 32% increase in sales.

FOOD SYSTEM SALES 2007		FOOD SYSTEM SALES 2012	
FOOD PRODUCTION	\$863,596,000	FOOD PRODUCTION	\$943,334,000
FOOD MANUFACTURING	\$2,922,006,000	FOOD MANUFACTURING	\$2,687,399,000
FOOD TRADE	\$3,830,782,000	FOOD TRADE	\$6,456,442,000
TOTAL:	\$7,616,384,000	TOTAL:	\$10,087,174,000

Source: USDA Census of Agriculture, Economic Census, 2007, 2012 with REMI model estimates by Kavet, Rockler and Associates, LLC. Adjusted for inflation to 2014 dollars.

17 ↗ Food System Employment Increased 11.6%

Nonfarm food system employment—retail, manufacturing, farm inputs, and distribution—increased by over 5,300 jobs (+11.6%) from 2002 to 2014. This compares very favorably to other sectors of Vermont's economy. Nonfarm food system employment grew 9.7% from the end of the recession in 2009 to 2014, compared to a gain of 3.2% for total Vermont employment. Total manufacturing employment decreased 21.8% during this period while food manufacturing increased 40.5% (+1,873). Although the number of farm workers increased 16.6% from 2002 to 2014, note that farm workers are not depicted here since many farm workers have off-farm jobs and may therefore be double counted.



Source: Vermont Department of Labor, U.S. Census Bureau Nonemployer Statistics, multiple years.

11 ↗ Net Value Added Food Manufacturing Increased 58%



Except for a dip in 2009—in the heart of the Great Recession and the lowest year on record for milk prices—value added food manufacturing in Vermont has tended to increase. From 2004 to 2013, total value added manufacturing in Vermont decreased 37% (-\$2.3 billion), but **net value added food manufacturing increased 58% (\$359 million)** and has increased from 9.9% of total value added manufacturing in 2004 to 24.9% in 2013.

Source: U.S. Census Bureau Annual Survey of Manufactures and U.S. Census Bureau Nonemployer Statistics. Adjusted for inflation to 2014 dollars. 2012 data was not available.

24 Vermont Agriculture Ranks Highly on Many Indicators...



#1 Market Value
\$943 MILLION (2012), TOPS IN AG SALES IN NEW ENGLAND



#1 Maple Syrup
1.3 MILLION GALLONS (2014), TOPS IN U.S.



#1 Organic Farms
7.8% OF ALL FARMS, TOPS IN U.S.

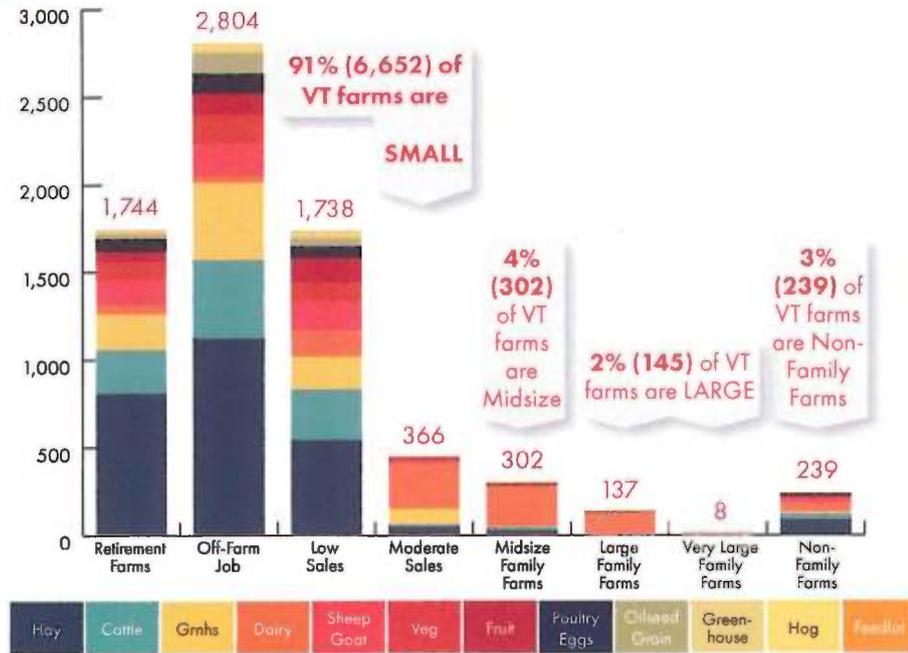


#6 Direct Sales
3.5% OF TOTAL SALES AND 28% OF FARMS

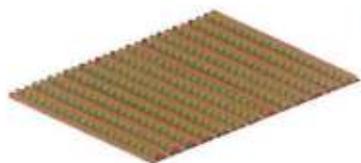


#8 Women Farmers
39% OF ALL VT FARM OPERATORS ARE WOMEN

9 However, Most Vermont Farms are Small...

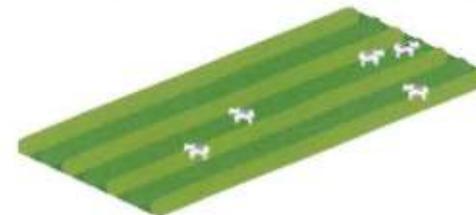


...And a Small Number of Large Farms Account for Most Ag Sales



FARMS < 220 ACRES

- 90% of farms under 220 acres—5,168 farms—had sales <\$50,000
- 79% of farms under 220 acres—4,491 farms—got <25% of household income from farming



FARMS > 260 ACRES

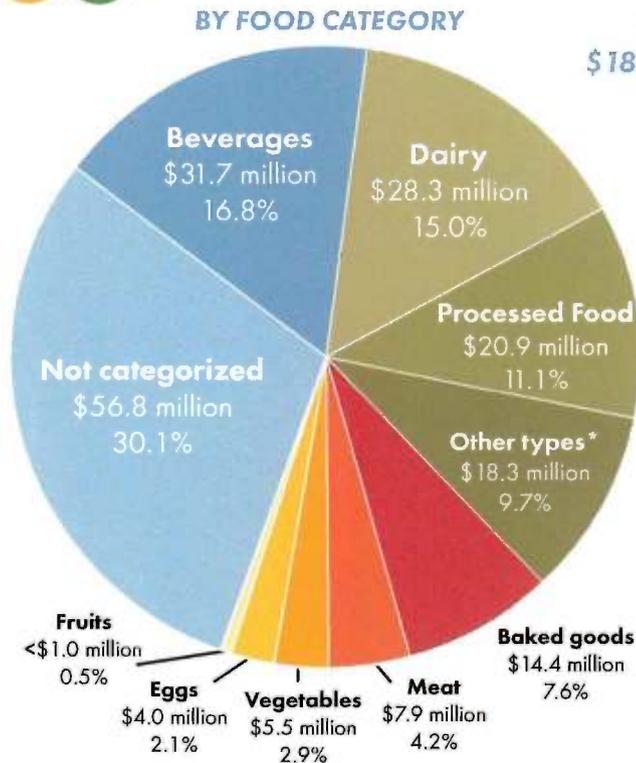
- 68% of farms over 260 acres—903 farms—had sales >\$50,000
- 67% of farms over 260 acres—893 farms—got >25% of household income from farming

SOCIAL TRENDS

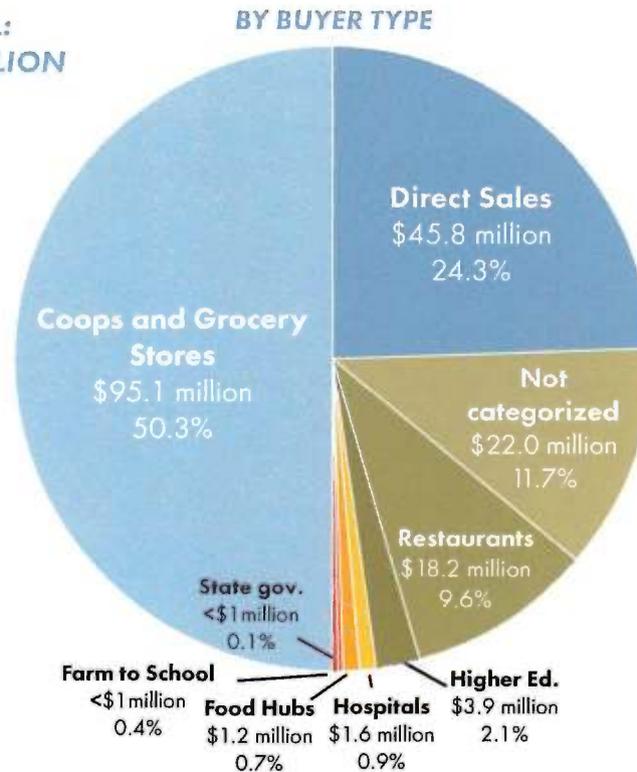
The adoption of local purchasing behaviors has shifted dramatically over the past five years as consumers, *chefs*, and food manufacturers have demanded more locally sourced meats, produce, minimally processed ingredients, and house-made products. Major food corporations have *lost market share* as consumers have shifted to healthier

options. At the same time, the lingering effects of the Great Recession have meant that household food insecurity is *essentially unchanged* from 2011 to 2014. And, even in Vermont—one of the healthiest states in the country—the percentage of overweight and obese adults continues to trend in the wrong direction.

1 Local Food Purchases Have Increased



* Other types includes processed foods, sweeteners, grains.



"BLACK RIVER PRODUCE/BLACK RIVER MEATS HAS BEEN FORTUNATE TO BE CONNECTED TO THE LOCAL FOOD AWARENESS THAT TAKES PLACE THROUGHOUT THE REGION BUT THERE IS STILL A CONSISTENT GROWING DEMAND FOR NON-LOCAL AND REGIONAL PRODUCTS. FOR EVERY NEW CUSTOMER WE CAN GET INTO A LOCAL PROGRAM THERE IS ANOTHER WHO IS TRANSITIONING THEIR PURCHASING TO SOMETHING CHEAPER.

BLACK RIVER PRODUCE/BLACK RIVER MEATS CONTINUES TO PUSH LOCAL AS MUCH AS POSSIBLE BUT OUR CHALLENGE INCREASINGLY BECOMES NAVIGATING AND COMMUNICATING WITH CUSTOMERS WHO SHARE THESE VALUES IN AN AUTHENTIC MANNER. WE ARE OPTIMISTIC THAT WITH EXPANDED CONSUMER ENGAGEMENT ABOUT THE IMPORTANCE OF LOCAL FOOD SYSTEMS THAT WE CAN BRING MORE PEOPLE TO THIS MARKETPLACE."

SEAN BUCHANAN, BLACK RIVER PRODUCE/MEATS

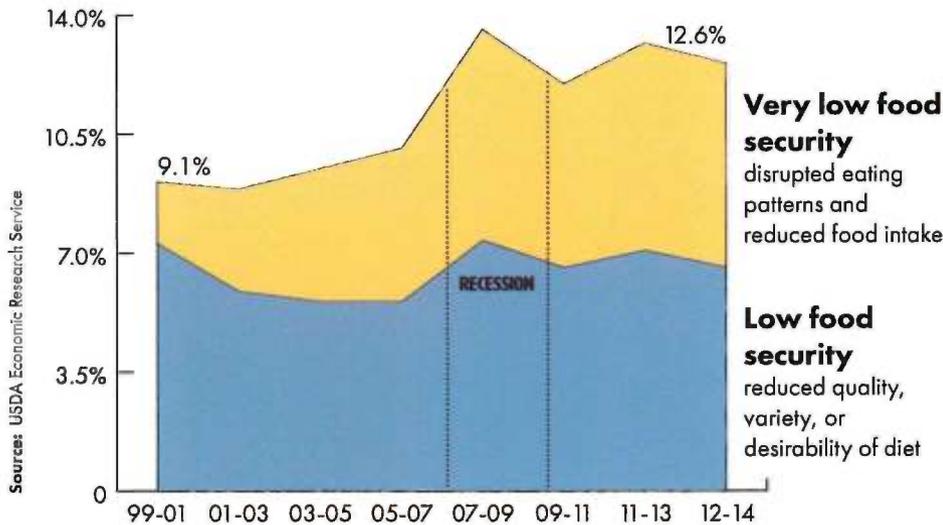
Florence Bécot, MS and Dr. David Conner of the *University of Vermont* collaborated with Farm to Plate to survey food system organizations and gather official data to arrive at an estimate of about \$189 million (6.9%) of total food purchases (nearly \$3 billion) going toward local food purchases. Data limitations meant that 30% of purchases could not be classified by food category, but beverages, dairy products, and processed food made up the largest percentages. Coops and grocery stores were the biggest buyers of local foods.

2 Local Food Purchase Baselines Established

In its first full year of operation, *Sodexo's Vermont First initiative* purchased \$1.3 million in local food, equal to 15.4% of total purchases. *Farm to Institution New England* has gathered baseline data for *farm to school*, *farm to college*, and *farm to health care* institutional purchasers in the region. Their research also establishes that availability, price, and variety were the most frequently cited barriers to sourcing local food by New England colleges and universities.

15 Food Insecurity in Vermont is Up Since Great Recession but has Levelled Recently

The percentage of food insecure Vermont households increased from an average of 9.1% (greater than 22,000 households) from 1999 to 2001 to an average of 12.6% (greater than 32,000 households) from 2012 to 2014. Grand Isle County has the lowest percentage of food insecure households (10.8%), while Orleans County has the highest percentage (14.0%).



State agencies and many food system organizations convened to develop the "**Vermont Farm Worker Wage, Hour and Housing Fact Sheet.**" Available in English and Spanish, it provides information about rental housing, wage, and other laws. This information will assist all types of Vermont farms to navigate the requirements of state and federal law surrounding agriculture, value added agriculture, interns, and on-farm housing. It also includes some best practices for housing and retaining labor. The fact sheet is available on many websites, including the Vermont Agency of Agriculture and Department of Labor websites:

▶ <http://bit.ly/1jEtulE>

3 The Percent of Overweight and Obese Adult Vermonters Increased

Although Vermont is rated as one of the healthiest states by the United Health Foundation, the percent of overweight (body mass index = 25.0 to 29.9) and obese (body mass index = 30.0 or higher) adults has increased over the past 20 years. In 1995, 52% of adult Vermonters were considered normal weight, while 33% were overweight, and about 15% were obese. In 2013, 24.7% of adults were obese, 37% were overweight, and about 37% were normal weight. Chittenden County has the lowest percentage of obese adults (21.0%), while Orleans County has the highest percentage (29.9%).



Source: Centers for Disease Control and Prevention

16 Number of Food System Education Learning Opportunities Expands

In June 2015, the first Vermont Food Systems Summer Study Tour brought together students from across the country who are studying how communities source, grow, process, purchase, and contemplate food. The tour is offered annually through the Vermont Higher Education Food Systems Consortium, made up of seven institutions at the forefront of food system research, innovation, and education: Sterling College, New England Culinary Institute, University of Vermont, Green Mountain College, Vermont Technical College, Vermont Law School, and Middlebury College.

Vermont school districts ranked 7th nationally for the percentage of school districts offering farm to school programs, and more Vermont school districts reported offering a wider variety of activities than other New England school districts. Vermont FEED, the Agency of Agriculture, and the Vermont Farm to School Network convened a strategic systems mapping process in 2015 in order to scale up farm to school across the state. There are also over 375 community and school gardens around the state that provide space for people of all ages and backgrounds to grow their own food.

ENVIRONMENTAL TRENDS

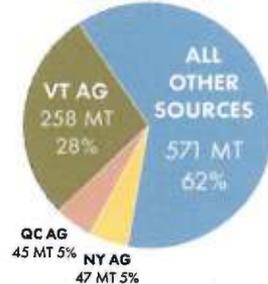
6 Act 64 Gets Underway

The *Lake Champlain Basin Program* reports that nutrient runoff from agricultural activities in Vermont accounts for 28% (258 metric tons) of the total phosphorus load in Lake Champlain—the single biggest contribution from any state or category.

Vermont's new *Clean Water Act*—the most comprehensive water quality legislation in Vermont's history—aims to change that. The Act creates new regulations and devotes more resources to reduce pollution from farms, roads, and impervious surfaces. The USDA awarded \$16 million to Vermont through the *Regional Conservation Partnership Program* to help address pollution in Lake Champlain. The grant was the second largest in the country and provides 26 partnering organizations, agencies, businesses, and nonprofits with the resources to provide financial and technical assistance to agricultural and forest landowners to improve water quality in the Lake Champlain Basin.

The *Vermont Housing and Conservation Board* and many partner organizations coordinated three water quality cross trainings in April 2015, bringing together nearly 200 agricultural service providers working in the realms of conservation, stewardship,

TOTAL PHOSPHORUS LOAD TO LAKE CHAMPLAIN:
921 MT/YEAR



Ray Archuleta, Conservation Agronomist at the Natural Resources Conservation Service, was the keynote speaker at the fifth annual Farm to Plate Gathering.

farm viability, and soil and water quality. The trainings provided networking, greater understanding of water quality regulations, increased knowledge of the conservation easement process, business and financial planning resources, and opportunities to better coordinate services.

Soil health and water quality were also the themes of the fifth annual Farm to Plate Gathering in October 2015. "Farm in nature's image" was the takeaway message shared by keynote speaker *Ray Archuleta, Conservation Agronomist at the USDA Natural Resources and Conservation Service*. Archuleta engaged the 250 Farm to Plate Network members in attendance with a soil stability demonstration, comparing no till and reduced tilled versus heavily tilled soil when immersed in water. The heavily tilled soil rapidly came apart while the no till soil retained its form. The health of the no till soil was maintained through practices such as cover cropping, integrating a diversity of plants and animals, and reducing chemical, biological, and physical stress. Archuleta encouraged Farm to Plate Network members to understand that the social and ecological context of the food system provides vast opportunities to cleanse the water that runs through it, grow healthy food, and provide for flood protection.

"SOIL IS NOT SOMETHING TO TAKE FOR GRANTED. IT IS A PRECIOUS RESOURCE THAT MUST BE FED AND NURTURED, MUCH LIKE WE FEED AND NURTURE OUR CHILDREN."
VICKI DREW, STATE CONSERVATIONIST, USDA NATURAL RESOURCES CONSERVATION SERVICE



PHOTO COURTESY OF USDA-NRCS

Vermont's *USDA Natural Resources Conservation Service* provides financing and technical assistance for farmers interested in improving their conservation practices, including edge-of-field monitoring.

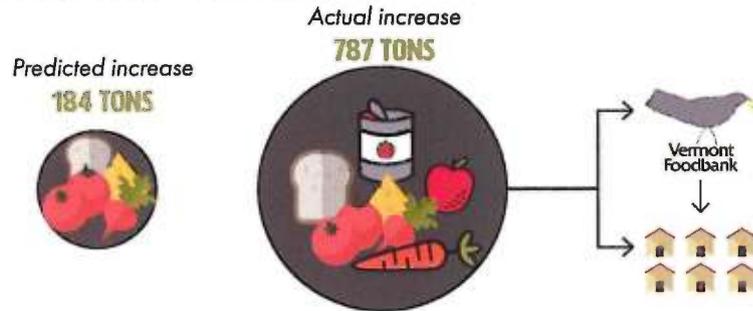


PHOTO COURTESY OF INTERVALE CONSERVATION NURSERY

The *Intervale Conservation Nursery*—which grows more than 30 species of native trees and shrubs for planting around Vermont waterways—plays a critical role in helping to prevent erosion and help filter sediment and nutrients from entering lakes and streams.

14 More Food Rescued than Anticipated

The *Agency of Natural Resources systems analysis* for understanding the impact of universal recycling made a conservative estimate that food rescued would increase by 184 tons from 2014 to 2015. As it turned out, the Vermont Foodbank reported that the amount of food rescued from 2014 (1,099 tons) to 2015 (1,886) actually increased by 787 tons— a 72% increase!



"THIS IS REALLY FANTASTIC IN TERMS OF THE TRIPLE BOTTOM LINE FOR THE COMMUNITY, GOOD ECONOMIC BUSINESS PRACTICES, AND BENEFITS FOR THE ENVIRONMENT IN DIRECTING EDIBLE FOOD TO PEOPLE THAT NEED AND WANT IT." *BRYN OAKLEAF, ENVIRONMENTAL ANALYST, VT DEPARTMENT OF CONSERVATION*

22 Renewable Energy Installations at Food Businesses Increased

The intersection of energy systems and food systems is fertile ground for developing sustainable solutions to pressing problems. Many food system businesses are already renewable energy generators and the number seems to grow every day.



Source: Community Energy Dashboard

GETTING TO 2020

At the heart of our food system is a desire to trust the people, places, practices, and products that nourish us. In its first five years, the Farm to Plate Network has worked to build and strengthen relationships across the state. As we dive into the next five years, we will need to amplify our circles of trust within and across regions to address complex challenges around scaling up food production, improving farm viability, reducing diet-related diseases and food insecurity, and maximizing our nutrient management, environmental sustainability, and renewable energy opportunities.

ECONOMIC TRENDS: Going forward, the Farm to Plate Network is exploring how to improve technical and financing assistance offerings so that farmers and food businesses can weigh different costs and scales of production options, sales in different market channels, and environmental impacts. Building coordination along entire supply chains, particularly in the meat industry, will be a focus of the Network as well as increasing the efficiency, volume, and year round production of local food products, which will then help producers sell into larger markets.

SOCIAL TRENDS: Diet-related diseases are on the rise and connecting our food system to our health care system is critical. Going forward, a new Health Cross-Cutting Team will make these connections and develop strategies to encourage Vermonters to make healthier food choices. The Food Access Cross-Cutting Team is linking charitable food organizations with the agriculture sector and will be monitoring how various programs help make Vermonters more food secure.

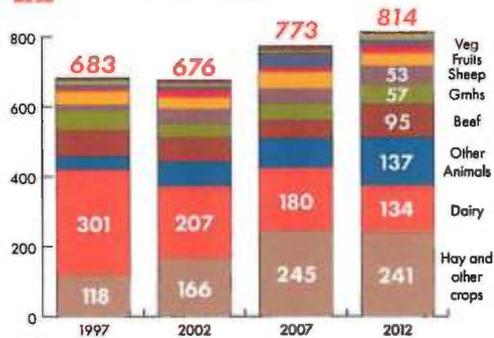
ENVIRONMENTAL TRENDS: Universal recycling, Act 64, and Act 56 all provide opportunities for Vermont's food system and Farm to Plate Network members to build in resilience against the weird weather that is becoming the norm.

"THE LAST FIVE YEARS HAVE SEEN A REMARKABLE INCREASE IN COORDINATION, AWARENESS AND COHESION AMONG ALL THE ECONOMIC ACTORS THAT HELP DRIVE A DYNAMIC FOOD SYSTEM. THE LAST FIVE YEARS HAVE ALSO SEEN AN INCREASE IN DIVERSIFIED BUSINESS MODELS ON FARMS, FOOD SYSTEM ENTREPRENEURSHIP, AND REMARKABLE INNOVATION." *DAN SMITH, PRESIDENT, VERMONT TECH*

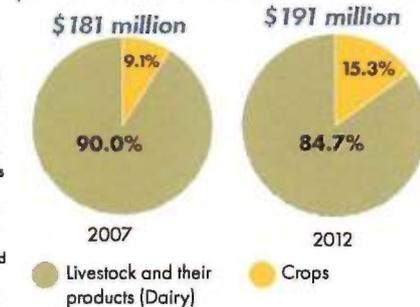
Regional Highlights

Addison County

#1 — 814 FARMS

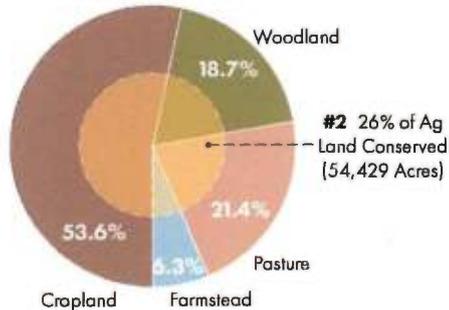


\$ #1 — \$191 MILLION AG SALES

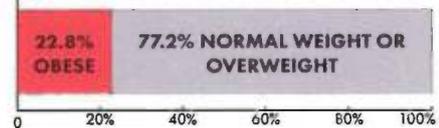


#1 — 208,362 ACRES

-0.5% FROM 1997



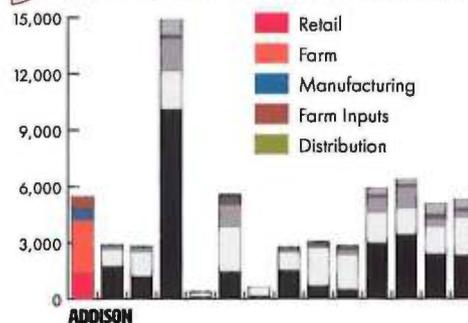
#10 22.8% OF ADULTS OBESE



#10 4,400

12.0% OF POPULATION FOOD INSECURE

#5 — 5,468 FOOD SYSTEM JOBS



VBM 100+

RANKED BY REVENUE
149. MONUMENT FARMS, INC.: \$6.8 M

WORKING LANDS GRANTS



Addison County is Vermont's agricultural leader, ranked #1 in number of farms, agricultural sales, and land in agriculture, and fifth in food system jobs. Addison County also ranks low in adult obesity and food insecurity. Dairy production and processing anchor Addison County's food system: it has the second highest number of dairy farms, *Agri-Mark (Cabot Creamery Cooperative)* is a major employer, and several other *milk processors and cheesemakers* are based here. But Addison County has also added to this traditional sector with many new or expanding *craft alcoholic beverage businesses*.

ACORN—which promotes the local food movement in Addison County through many educational activities—views the biggest challenge for non-dairy producers as opening up new markets through institutional channels and exports.



Vermont Farm Tours makes a stop at Champlain Valley Creamery (Middlebury).



"THE PAST 5 YEARS HAS SEEN THE EXPLOSIVE GROWTH OF 'ADULT BEVERAGE' BUSINESSES - WHISTLE PIG, APPALACHIAN GAP DISTILLERY, STONECUTTER SPIRITS, VERMONT HARD CIDER, SHACKSBURY, CHAMPLAIN ORCHARDS CIDERY. LINCOLN PEAK WINERY IS GROWING AND OTTER CREEK BREWERY JUST BROKE GROUND ON ANOTHER EXPANSION."

ROBIN SCHEU, EXECUTIVE DIRECTOR, ADDISON COUNTY ECONOMIC DEVELOPMENT CORPORATION

farmplate NETWORK ACTIVITIES

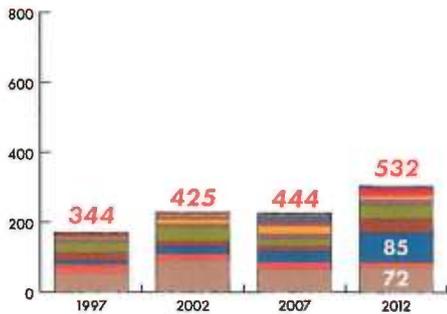
The first Farm & Food Tech Social Meet-up was held in January 2015 at the *Generator Maker Space* in Burlington. The Meet-up event was organized by the *Tech Task Force* to connect Vermont farms, food businesses, and other food-related organizations as they encounter new sets of challenges and opportunities related to innovations in infrastructure development. At the Meet-up, Cloudfarm's Cam MacKugler, based in Middlebury, discussed his company's innovative *Seedsheet*. Seedsheet is made of a sheet of woven weed resistant cloth, with perfectly spaced water soluble pods containing organic non-GMO seeds—which customers can customize depending on what they want to grow. Gardeners simply lay the Seedsheet out in their garden, water the pods, and watch the seeds grow.



CLICK ON MAP FOR MORE INFO ABOUT ADDISON COUNTY

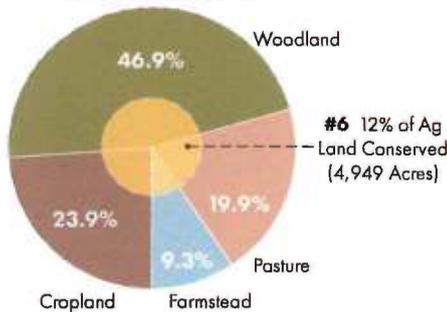
Bennington County

#12 — 532 FARMS (+54.7%)

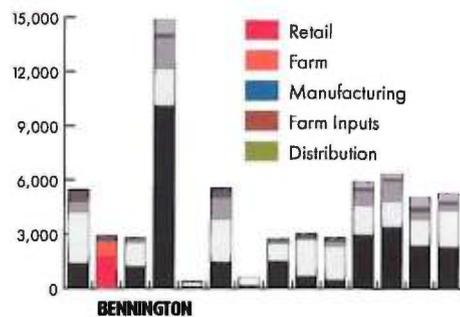


#12 — 41,387 ACRES

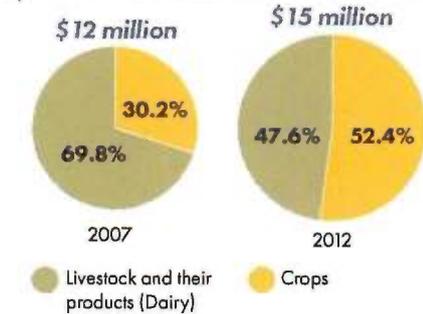
+19.0% FROM 1997



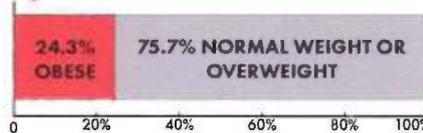
#9 — 2,890 FOOD SYSTEM JOBS



\$ #13 — \$15 MILLION AG SALES



#9 24.3% OF ADULTS OBESE



#5 4,980

13.5% OF POPULATION FOOD INSECURE

VBM 100+

RANKED BY REVENUE
30. VERMONT COUNTRY STORE: \$100 M

RANKED BY EMPLOYEES
26. VERMONT COUNTRY STORE: 623

WORKING LANDS GRANTS



Bennington County is famously home to *The Vermont Country Store* headquarters and Robert Todd Lincoln's *Hildene*, but with the Green Mountain National Forest and mountains covering a significant percent of the county's area, this southern county is a relatively small contributor to Vermont's agricultural economy. Direct sales increased 79% (+\$352,000) from 2007 to 2012, so there is some evidence of local food system growth, but it is also the case that agricultural production from New York State permeates local markets.



J.J. Hapgood General Store and Eatery (Peru) is a community hangout and source of local food.

The Northshire, anchored by Manchester, has a stronger restaurant and tourism scene, while the Southshire, anchored by Bennington has struggled in recent years. Food insecurity continues to be a major issue in the Bennington area: use of charitable food distribution sites—which are numerous in the southern part of the county—has increased. This follows a more general pattern of increasing poverty and economic depression in the area. There is a new focus on expanding the region's food and beverage manufacturing industry, which includes *Wilcox Ice Cream*, *Gringo Jack's*, *Maplebrook Farm*, and a new distillery under construction: *Spirits of Old Bennington*. The *Tutorial Center's Youth Agriculture Project* also provides skills to students while expanding local food into institutional markets, such as the *Southwestern Vermont Medical Center*.

"FOOD COULD BE, IN MANY WAYS, AT THE CENTER OF A PARADIGM SHIFT IN THE LOCAL CULTURE AND ECONOMY OF BENNINGTON COUNTY (ESPECIALLY THE SOUTHERN PART—BENNINGTON AND THE SURROUNDING TOWNS), BUT IT WILL TAKE SOME DRAMATIC CHANGES TO MAKE THAT POSSIBLE."

BILL COLVIN, BENNINGTON COUNTY REGIONAL COMMISSION

farm^{to}plate NETWORK ACTIVITIES

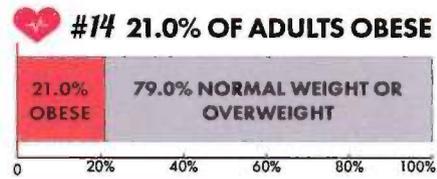
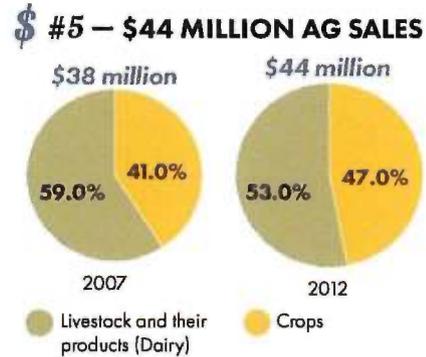
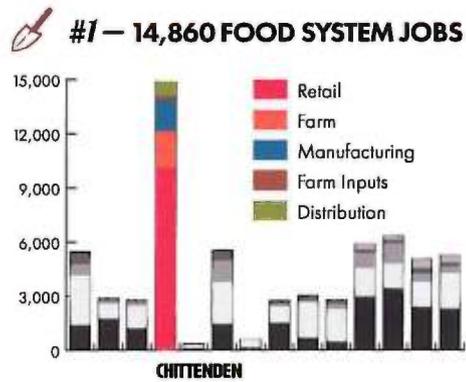
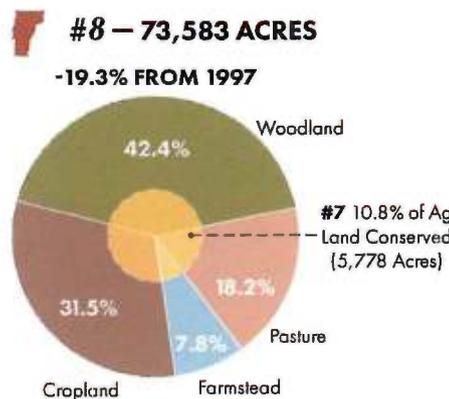
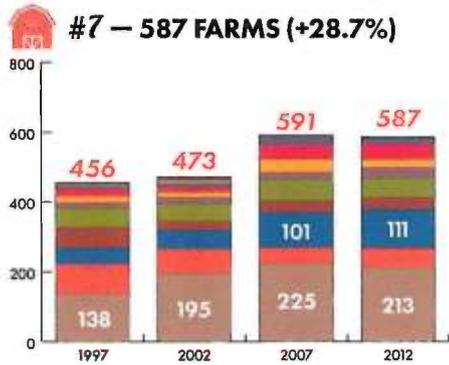


Bennington County's food system development has become more coordinated in the past year thanks to the emergence and work of *Northshire Grows*. Working with the Farm to Plate Network, Project Director Liz Ruffa has been developing a local network to connect farmers, businesses, and institutions, as well as working with *Vermont FEED* to provide farm to school trainings for local teachers. Northshire Grows has raised funds to pay

for a part-time Farm to School coordinator, which has provided much needed capacity to advance food system projects in the region.



Chittenden County



VBM 100+

RANKED BY REVENUE

125. VERMONT SMOKE & CURE:	\$9.8 M
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RANKED BY EMPLOYEES

17. BEN & JERRY'S HOMEMADE:	735
54. SODEXO:	350
69. BLODGETT OVEN CO.:	300
78. GARDENERS SUPPLY:	262
91. FARRELL DISTRIBUTING:	220



With more than double the population of the next largest county, it's no surprise that Chittenden County has the most food system jobs, restaurants, stores, farmers' markets, breweries, bakeries, and other food manufacturing businesses. Chittenden County is also home to several unique businesses with national reach: for example, *Blodgett Oven Co.*, (Burlington) is a manufacturer of ovens for bakeries, commercial and institutional kitchens, and restaurants; *Gardener's Supply Company* (Burlington) is an employee-owned company that sells gardening products online.

Burlington boasts a strong urban farming culture, largely due to its relationship with the *Intervale Center*, the nonprofit responsible for stewarding 350-acres of Winooski River bottomland. The Intervale's *Farms Program* leases land and equipment to small farms. The *Intervale Food Hub* aggregates food from local producers and delivers to the Burlington area.

City Market/Onion River Co-op (Burlington) has the largest sales volume of any food co-op in the U.S. and plans to open a new location in the city's South End. City Market stocks more than 2,000 local food items and local food sales were equal to about 38% (\$14.7 million) of food sales in 2015. Bucking the trend of national grocery store consolidation, Chittenden County's Mike Comeau has opened four independent grocery stores over the past 4 years: *Richmond Market & Beverage*, *Shelburne Supermarket*, *Johnson's Sterling Market*, and *Village Market of Waterbury*. All of these stores sell a wide variety of local products including produce, meat, dairy, and bakery items.



Rhino Foods (Burlington) is the #1 producer of cookie dough for ice cream and frozen desserts.

"THE FARM AND FOOD SCENE IN CHITTENDEN COUNTY IS INCREDIBLE. IT'S CLEAR FOLKS BELIEVE IN THE POWER OF GOOD FOOD TO ENHANCE OUR ECONOMY, COMMUNITY AND TREASURED NATURAL RESOURCES. IT'S ALSO CLEAR THAT WE MUST FURTHER INNOVATE AND GROW OUR IMPACT IN THE FACE OF THINGS LIKE CLIMATE CHANGE, MARKET CONSOLIDATION AND FOOD JUSTICE."

TRAVIS MARCOTTE, EXECUTIVE DIRECTOR, INTERVALE

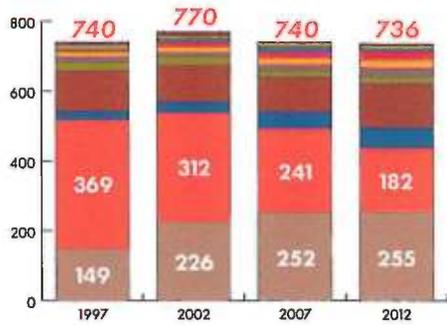
farmplate NETWORK ACTIVITIES

Building upon the *Independent Grocers Assessment* conducted by the *Supply & Demand Task Force* in 2014, Sona Desai (Intervale Food Hub) and Annie Harlow interviewed 40 independent retailers about buying habits and interest in technical and marketing assistance. This research assessed what products stores currently carry and gauged interest in increasing the availability and sale of local foods in these stores. Interviews with store managers revealed strong interest in improving procurement, marketing, and merchandising of local food. Both phases of the assessment will be used to design technical service modules for interested stores.



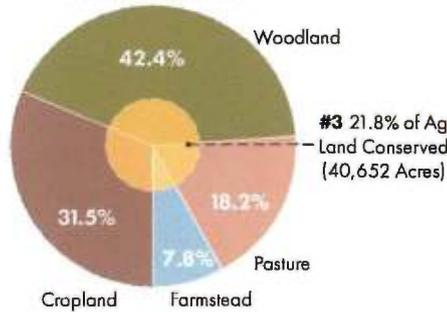
Franklin County

#4 — 736 FARMS (-0.5%)

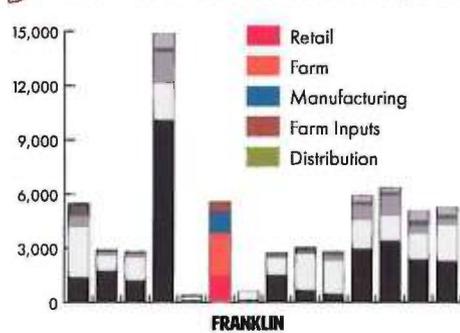


#2 — 186,294 ACRES

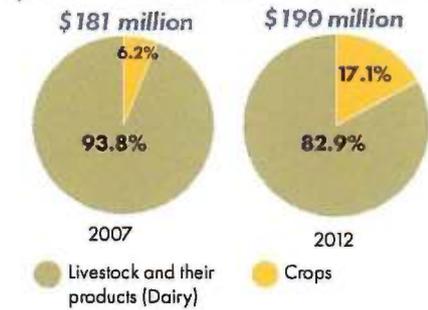
-3.4% FROM 1997



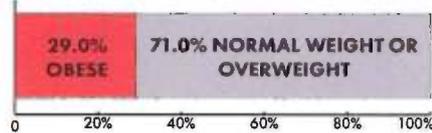
#4 — FOOD SYSTEM JOBS: 5,549



\$ #2 — \$190 MILLION AG SALES



#2 29.0% OF ADULTS OBESE



#13 5,650

11.8% OF POPULATION FOOD INSECURE

VBM 100+

RANKED BY REVENUE
10. ST. ALBANS COOPERATIVE CREAMERY: \$377 M

WORKING LANDS GRANTS



Franklin County runs a close second to Addison County for top agricultural county in Vermont. Franklin County has the most dairy farms in Vermont and the *St. Albans Cooperative Creamery* is the state's major processor of fluid milk, cream, skim condensed milk, and powdered milk. While Addison County is home to many small-scale specialty food manufacturers, Franklin County uniquely features several large-scale private label manufacturers.

Swan Valley Cheese of Vermont makes high quality aged cheeses like parmesan and romano sold under the Suprema brand name and for private label accounts. *Franklin Foods* is now the second largest retail private label cream cheese supplier in the U.S. *Barry Callebaut* is an international chocolate and cocoa maker with a facility in St. Albans.

With water quality issues looming large in the agricultural community due to the issuing of the Lake Champlain TMDL and the passage of the Vermont Water Quality Act, a \$16M grant from NRCS targets federal funds for water quality improvements to conserved farms in the Lake Champlain basin and targets farmland protection funds to conserve additional farms in Missisquoi Bay and St. Albans Bay.



"In Good Taste," a localvore food tasting event organized by the Northwest Vermont Healthy Roots Collaborative, drew 500 people in January 2015.

"FRANKLIN COUNTY IS NOT ONLY A LEADER IN MILK AND MAPLE PRODUCTION BUT IS PROUD OF THE INCREASED GROWTH IN DIVERSIFIED AGRICULTURE. FRANKLIN COUNTY IS MAKING A CONCERTED EFFORT TO CONNECT OUR LOCAL GROWERS AND PRODUCERS FOODS TO CREATE MORE EFFICIENT DISTRIBUTION SYSTEMS."

LEON BERTHAUME, CEO, ST. ALBANS COOPERATIVE CREAMERY

farm^{to}plate NETWORK ACTIVITIES

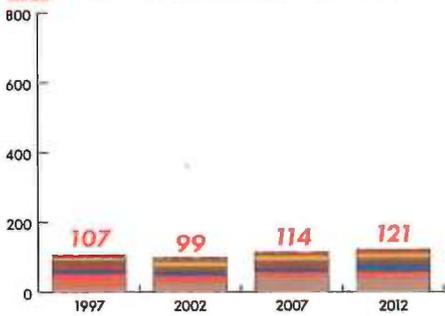
The Farm to Plate Network made soil and water quality the theme of its 5th Annual Network Gathering. *Franklin County dairy farmer Tim Magnant* participated in a farmer panel on day one of the event and discussed how his approach to soil and water quality has evolved over the years while sharing insights about how farmers can best respond to new water quality regulations. On day two, Magnant shared his experiences with practices like no-till, cover cropping, and comprehensive nutrient management planning with a group of water quality and business planning technical assistance providers. These practices have helped Magnant improve his yields and economic bottom line, and have provided an optimistic view for how farms can adapt, succeed financially, and improve the state's water quality in a changing regulatory environment.



CLICK ON MAP FOR MORE INFO ABOUT FRANKLIN COUNTY

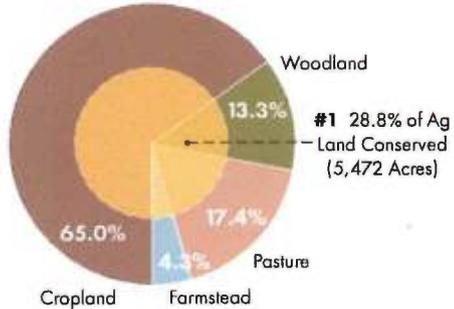
Grand Isle County

#13— 121 FARMS (+13.1%)

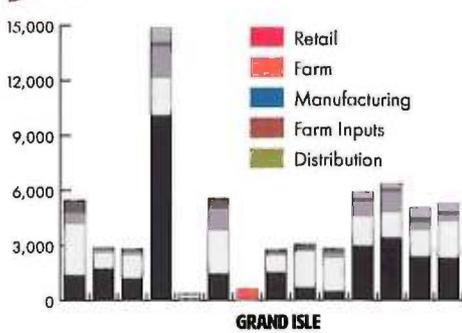


#14— 19,020 ACRES

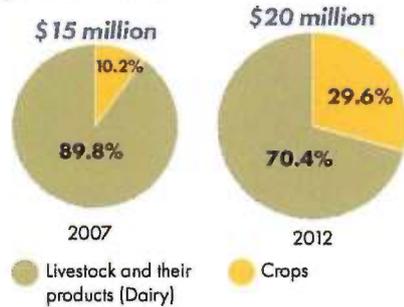
-13.2% FROM 1997



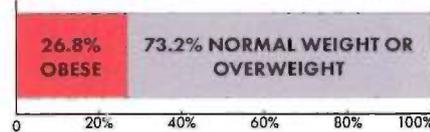
#13— FOOD SYSTEM JOBS: 601



#12— \$20 MILLION AG SALES



#7 26.8% OF ADULTS OBESE



#14 750

10.8% OF POPULATION FOOD INSECURE

VBM 100+

RANKED BY REVENUE
None listed.

WORKING LANDS GRANTS

None made.

As the smallest county in Vermont, it's no surprise that Grand Isle's contribution to Vermont's food system economy is relatively small. But many food producers—*Health Hero Farm, Snow Farm Vineyard, Savage Gardens*—and manufacturers—*Island Homemade Ice Cream, Grand Isle Pasta*—have experienced increased sales over the past several years, and businesses continue to see an increased desire for authentic Vermont products. And the *UVM Extension Northwest Crops and Soils Team* provides timely research and technical assistance on forages, grains, oilseeds, hops, and soil health for the whole state.

From his vantage at Snow Farm Vineyard, Dave Lane has witnessed some big changes in agritourism opportunities over the past few years: "I feel that the real change has been the level of collaboration or networking that has been happening. Businesses working together and offering packages of products or experiences. We partner with over a dozen other businesses. Groups such as *Lake Champlain Island Agricultural Network* and the *Open Farm and Studio Tour* are a couple of the lasting volunteer networks."



Snow Farm Vineyard (South Hero) hosts summer concerts and events.

"WE HAVE THOUSANDS OF TRAVELERS PASSING THROUGH THE ISLANDS EACH DAY ON THEIR WAY TO SOMEPLACE AND IT IS A CHALLENGE TO CAPTURE THAT BUSINESS. WE WILL NEED TO DO MORE WORK AS A DESTINATION AND I BELIEVE THAT WORK IS HAPPENING."

DAVID LANE, SNOW FARM VINEYARD

farmtoplate NETWORK ACTIVITIES

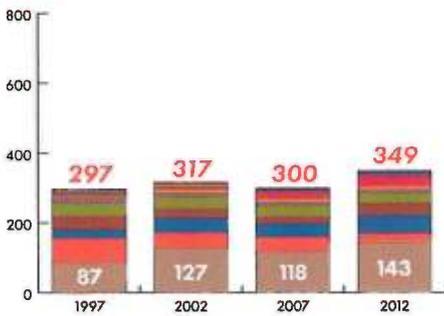


The *Agritourism Task Force* is focused on implementing statewide collaborative agritourism projects. This past summer, task force members organized the first annual *Open Farm Week* to coincide with National Farmers' Market Week and welcomed the public to experience a behind-the-scenes look at Vermont's vibrant working landscape. The task force also helped organize the *Rutland Agritourism Conference* in April, which focused on helping farms boost their agritourism, on-farm education, and direct sale experiences for customers. The 2016 *Open Farm Week* is scheduled for August 15-21. For more information, visit DigInVT.



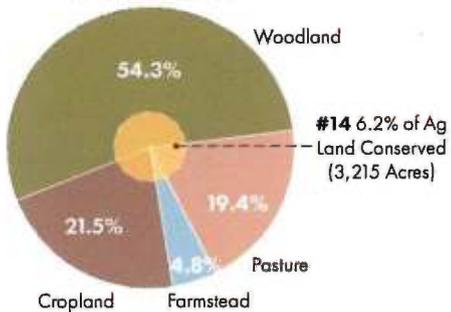
Lamoille County

#11 — 349 FARMS (+17.5%)

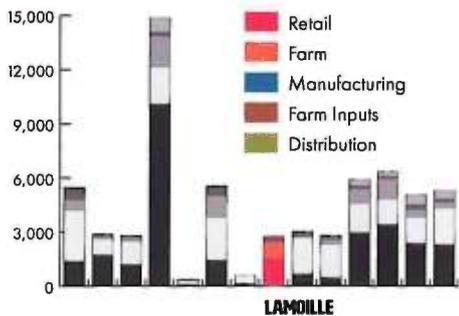


#10 — 52,093 ACRES

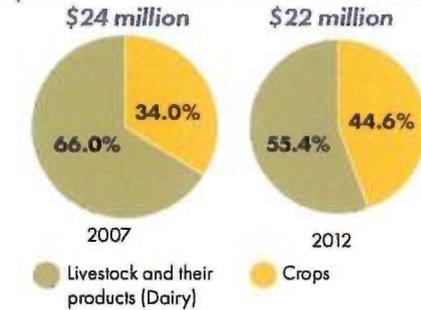
-2.1% FROM 1997



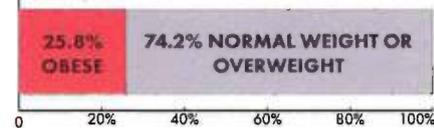
#12 — 2,742 FOOD SYSTEM JOBS



\$ #11 — \$22 MILLION AG SALES



#8 25.8% OF ADULTS OBESE



#7 3,230

13.1% OF POPULATION FOOD INSECURE

VBM 100+

RANKED BY REVENUE

151. HIGH MOWING ORGANIC SEEDS: \$6.5 M

WORKING LANDS GRANTS



As one of Vermont's smaller agricultural regions, Lamoille County faces some unique challenges: It has the third smallest population of any county, so there are only so many markets for food businesses to distribute to, but the transportation infrastructure makes it challenging for food businesses to access larger markets. Even with its small population, Lamoille County has experienced development pressures over the past 15 years that impact the amount of land available in a region already limited by mountains and forest. At the same time, young people are coming back to the area to take part in the food system economy. Municipalities are working on how to protect the working landscape by updating their zoning to provide more flexibility and by highlighting how food businesses can help grow the economy.

For these reasons—and because the region is a major ski destination—retail jobs are the largest percent of Lamoille County's food system jobs. But Farm to Plate Network members note an increase in the alcoholic beverage industry: the county now has *five breweries (with more on the way), two distilleries, and a hard cider producer*. And more schools are interested in and planning for integrating agriculture, food processing, and nutrient management into their curricula.



Salvation Farms (Morrisville) is an agricultural surplus management organization that helps to capture and move surplus food to Vermonters with limited access.

"WE HAVE A LOT OF FOOD ACCESS ISSUES — RURAL COMMUNITIES WITH LIMITED OPTIONS FOR BUYING GROCERIES OR PREPARED FOODS. WE COULD DO MORE TO DEVELOP THINGS LIKE THE ROLE OF HUNTING AND HOW THAT IS A PART OF OUR FOOD SYSTEM. HOW DO WE CONTINUE TO INSTILL THE SKILLS OF GROWING AND COOKING WHOLE FOODS THAT ONCE WERE SO COMMON?"
 TAYLOR FOSTER, REGIONAL PLANNER, LAMOILLE COUNTY PLANNING COMMISSION

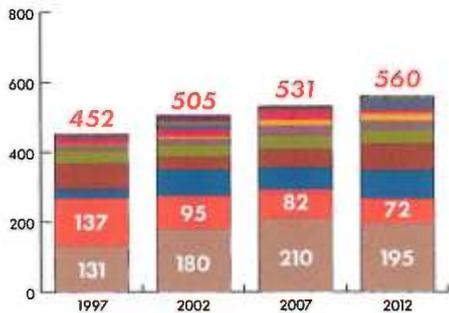
farm^{to}plate NETWORK ACTIVITIES

The *Food System Education Professional Learning Community* (PLC) launched in 2015 for middle school, high school, and Career Technical Education teachers to share and create food system education resources and curriculum. In 2016, the PLC will focus on generating new curriculum materials and shared assessment tools, and reaching out to businesses to gather feedback about their workforce needs. One PLC partner, *Green Mountain Technology and Career Center* (Hyde Park), with support from the Brewster Uplands Conservation Trust and the *Vermont Land Trust*, will use the Robtoy Farm House in Jeffersonville as a satellite agriculture campus for teaching sustainable and value-added agriculture.

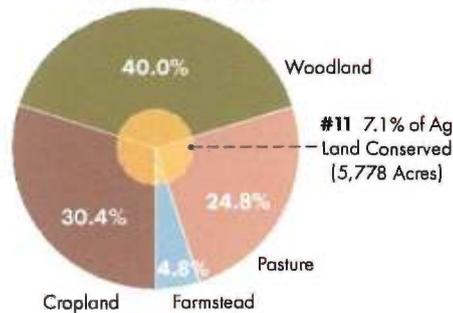


The Northeast Kingdom Caledonia County

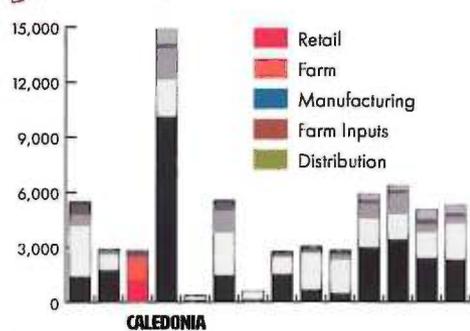
#8 — 560 FARMS (+23.9%)



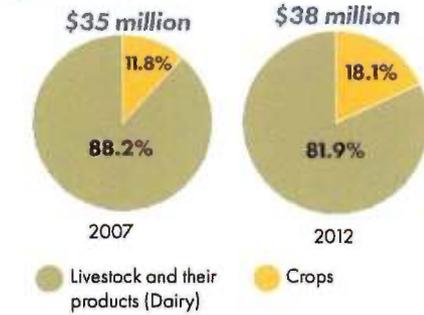
**#7 — 81,828 ACRES
-17.8% FROM 1997**



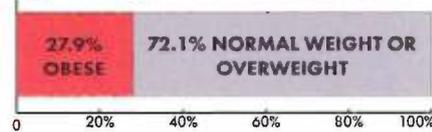
#11 — 2,794 FOOD SYSTEM JOBS



#6 — \$38 MILLION AG SALES



#4 27.9% OF ADULTS OBESE

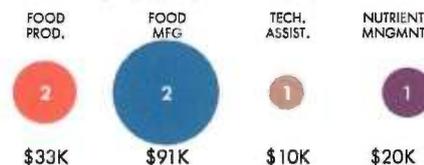


**#3 4,230
13.6% OF POPULATION FOOD INSECURE**

VBM 100+

RANKED BY REVENUE
None listed.

WORKING LANDS GRANTS



While often cited as the most economically depressed area of the state, the Northeast Kingdom has been an engine of food system innovation that has benefited Vermont and beyond for many years. For example, when *Pete's Green's* barn burned down in 2011 they used part of the donations to start the *Vermont Farm Fund*, which has provided \$470,000 in low-interest loans to 32 producers. The *Vermont Food Venture Center* operates the *Farm to Co-Packer Program*, which produces fresh-cut, minimally processed local fruits and vegetables from area farms for distribution to schools and restaurants. *Green Mountain Farm to School's* traveling farmers' market and *Lunchbox* food truck serve fresh local food to kids. The *Northeast Kingdom Tasting Center* in Newport features more than 30 Vermont companies. A new enterprise, *Sweet Tree Holdings* (Island Pond), is set to become the biggest maple syrup producer in the U.S. *Sterling College* (Craftsbury) was rated #1 in the nation for having the healthiest, fairest, and most sustainable college food system by the *Real Food Challenge*.



Mateo Kehler of Jasper Hill Farm (Greensboro) makes award winning cheeses.

"THERE'S MUCH WORK TO BE DONE. WE NEED TO FOCUS ON THE MAJOR UPCOMING TRANSITION OF LAND OWNERSHIP WITH OUR FARMS. THIS WILL BE CRITICAL, AS SUPPLY CHALLENGES BECOME MORE AND MORE EVIDENT LOCALLY AND REGIONALLY."
SARAH WARING, EXECUTIVE DIRECTOR, CENTER FOR AN AGRICULTURAL ECONOMY

Dairy production, particularly in Orleans County, continues to be the major agricultural driver in the region even as the number of dairy farms has declined. There are some examples of dairy farm diversification (e.g., Clair-A-Den Dairy created *Kingdom Creamery* ice cream) or expansion (e.g., Chaput Family Farms).

At the same time, the three NEK counties rank 1, 2, and 3 in food insecurity, and 1, 4, and 6 for adult obesity. Perhaps the key innovation of NEK food system organizations is to view their work as a way to simultaneously grow the economy and address persistent food insecurity and health problems. These organizations are supporting entrepreneurs, providing processing facilities, opening up market opportunities at schools and institutions, and educating consumers about the benefits of healthy local food.

farm@plate NETWORK ACTIVITIES

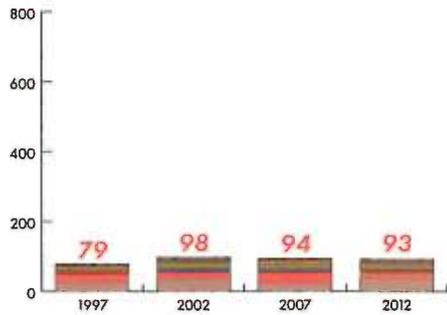
Members of the *Food Retailers Task Force* collaborated to receive USDA funding to develop the Fresh Fruit and Vegetable Coupon Program. Green Mountain Farm-to-School is administering the pilot with support from an advisory group. The program distributed \$75 in coupons to Northeast Kingdom families receiving 3SquaresVT benefits in order to purchase fresh fruits and vegetables at participating NEK grocery stores.



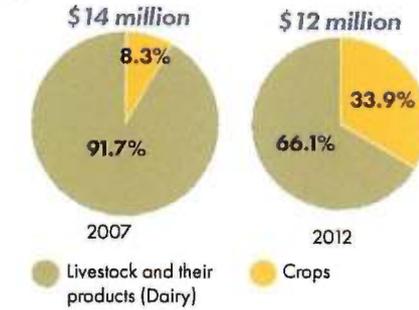
CLICK ON MAP FOR MORE INFO ABOUT THE NORTHEAST KINGDOM

Essex County

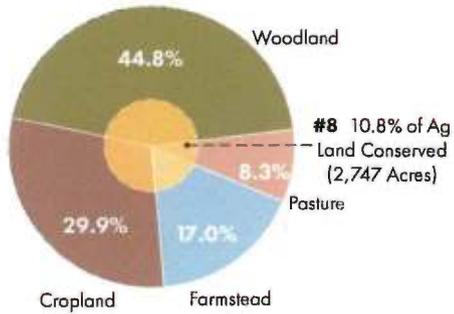
#14 — 93 FARMS (+17.7%)



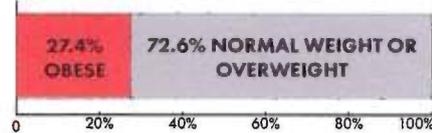
\$ #14 — \$12 MILLION AG SALES



**#13 — 25,491 ACRES
+0.2% FROM 1997**

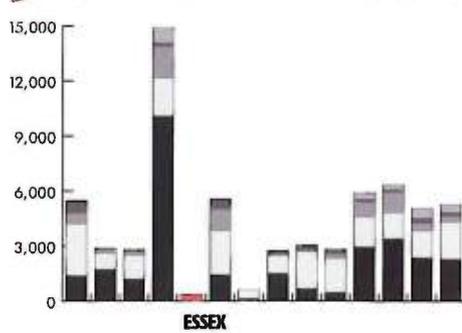


#6 27.4% OF ADULTS OBESE



#2 860
13.7% OF POPULATION FOOD INSECURE

#14 — 370 FOOD SYSTEM JOBS



VBM 100+

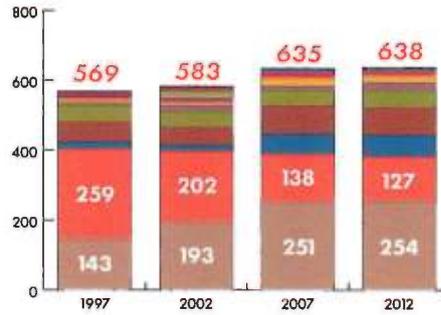
RANKED BY REVENUE
None listed.

WORKING LANDS GRANTS

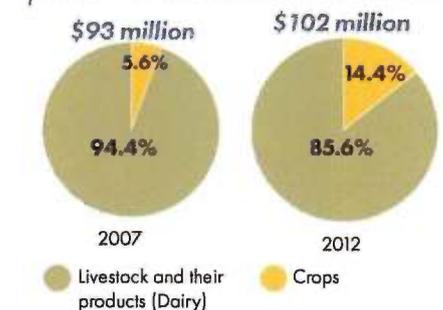


Orleans County

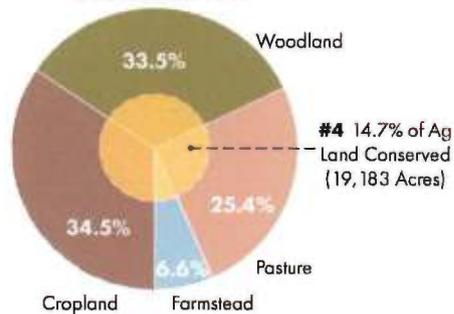
#6 — 638 FARMS (+12.1%)



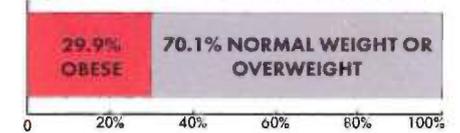
\$ #3 — \$102 MILLION AG SALES



**#3 — 130,445 ACRES
-8.3% FROM 1997**

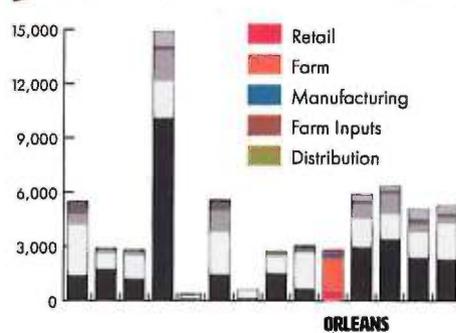


#1 29.9% OF ADULTS OBESE



#1 3,800
14.0% OF POPULATION FOOD INSECURE

#10 — 2,809 FOOD SYSTEM JOBS



VBM 100+

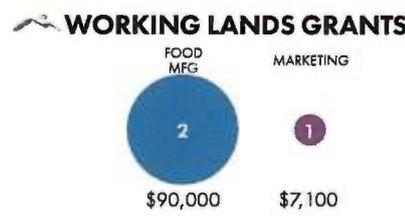
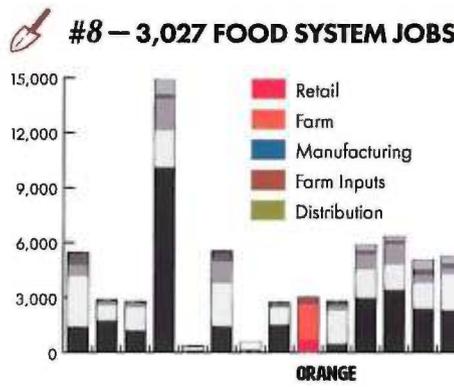
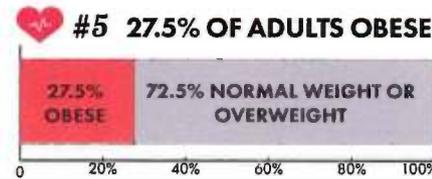
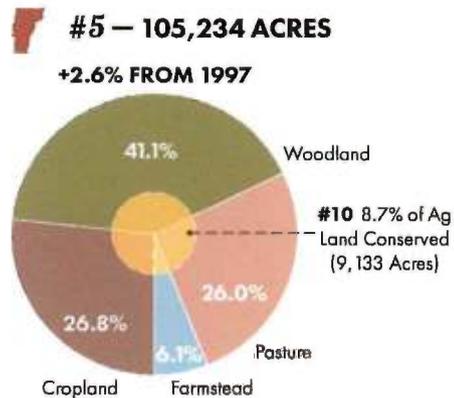
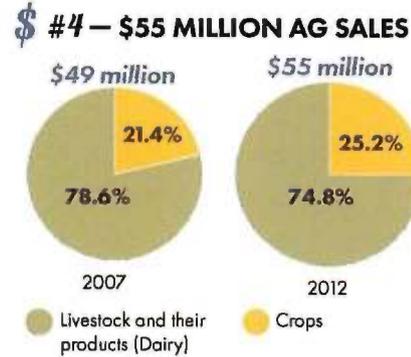
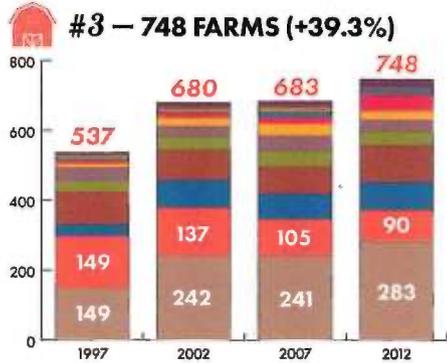
RANKED BY REVENUE

24. POULIN GRAIN, INC.: \$112 M

WORKING LANDS GRANTS



Orange County



Orange County is Vermont's stealth agricultural county, flying under the radar to rank #3 in farms, #4 in sales, and #5 in land in agriculture. Orange County has a declining number of dairy farms, an increasing number of beef and other livestock farms, the third highest vegetable sales, and a few well known brand names such as *Stratford Organic Creamery* and *Fat Toad Farm*.

Vermont Tech (Randolph) plays a big role in the state's food system: it offers many degree and certificate programs on topics such as food production, meat cutting, herd management, agricultural business management, and renewable energy. Vermont Tech's new anaerobic digester uses a mixture of manure from co-managed farms, organic residuals collected from businesses like *Grow Compost*, including brewery residuals from the *Alchemist*, the glycerol by-product of biodiesel production from waste cooking oil, grease trap waste, waste paper and locally collected pre- and post-consumer food residuals. These feedstocks produce 8,880 kWh of electricity per day and heat from energy generation will someday be used to heat four campus buildings, while solids left after the digestion process are used as bedding material for the college's dairy herd and recycled nutrients are used as crop fertilizer.



"Big Bertha" is Vermont Tech's community anaerobic digester, capable of generating 8,800 kWh per day.

PHOTO COURTESY OF VERMONT TECH

"THERE IS NO DOUBT ABOUT THE CENTRALITY OF THE WORKING LANDSCAPE AND THE FOOD SYSTEM TO VERMONT'S IDENTITY AND CULTURE. IN ORDER TO SUSTAIN IT, WE NEED TO ENSURE SUBSEQUENT GENERATIONS HAVE THE OPPORTUNITY TO BUILD THE PRACTICAL SKILLS, KNOWLEDGE AND THE ENTREPRENEURIAL SPIRIT THAT WILL ALLOW THEM TO KEEP THE LANDSCAPE OPEN AND ECONOMICALLY DYNAMIC. WE NEED TO ENSURE THAT WE MAINTAIN AN APPROPRIATE BALANCE BETWEEN THE FOCUS ON FOOD SYSTEM POLICY AND FOOD SYSTEM ENTREPRENEURSHIP, BECAUSE SUBSEQUENT GENERATIONS WILL RESPOND TO WHERE WE PUT OUR FOCUS TODAY."

DAN SMITH, PRESIDENT, VERMONT TECH

farm@plate NETWORK ACTIVITIES

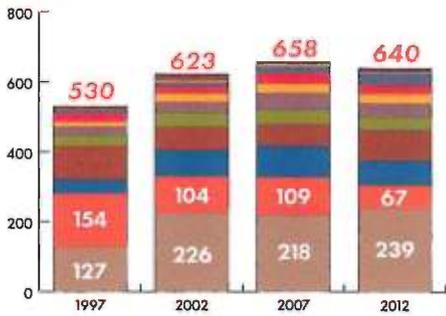
A new *renewable energy case study* was released in January by the *Energy Crosscutting Team*. It featured *Ayers Brook Goat Dairy's* (Randolph) barn-mounted solar PV installation—at 180 kW it's the largest installation of its kind in Vermont. All eight of the renewable energy and energy efficiency case studies were available at the 2015 Farm Show and then subsequently mailed to dairy farmers statewide. The case studies were revised as newspaper articles and published in over a dozen Vermont publications throughout the year.



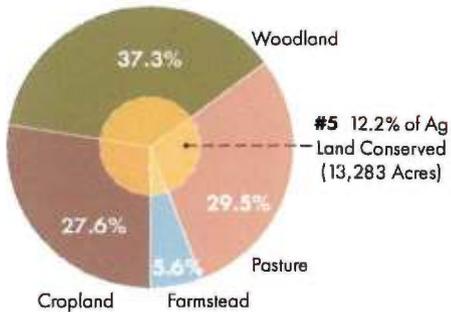
CLICK ON MAP FOR MORE INFO ABOUT ORANGE COUNTY

Rutland County

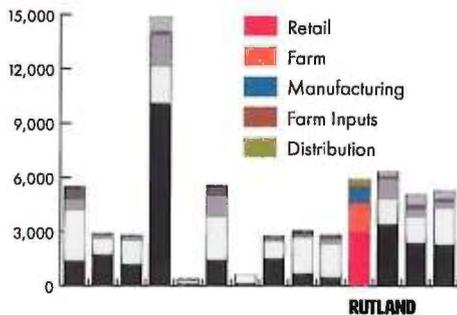
#5 — 640 FARMS (+12.1%)



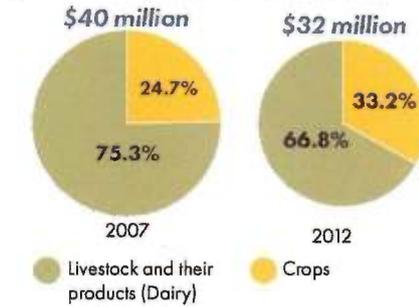
#4 — 108,497 ACRES
-13.7% FROM 1997



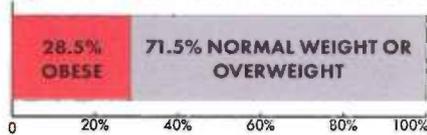
#3 — 5,879 FOOD SYSTEM JOBS



\$ #7 — \$32 MILLION AG SALES



#3 28.5% OF ADULTS OBESE



#4 8,290
13.5% OF POPULATION FOOD INSECURE

VBM 100+

RANKED BY REVENUE

150. THOMAS DAIRY: \$6.8 M

WORKING LANDS GRANTS



Green Mountain Power and the City of Rutland helped Rutland become the *solar photovoltaic capital of New England*. In a similar vein, the *Rutland Area Farm and Food Link* (RAFFL) has been working to strengthen the region's food system by providing technical assistance to beginning farmers and promoting food system businesses through the *Locally Grown Guide*. Their *Farm Fresh Connect* online farmers' market delivers local food to 14 workplaces, while the *Everyday Chef* program provides culinary classes to help people learn how to cook fresh, local food and make better health choices.



Laughing Child Farm (Powlet) is a certified organic sweet potato farm.

"THERE WILL NEED TO BE EXPANDED PRODUCTION AND MORE DISTRIBUTION NETWORKS IN ORDER TO KEEP EXPANDING THE WAY IN WHICH LOCAL FOOD REACHES PEOPLE. THIS LOOMS AS THE BIGGEST BOTTLENECK THAT THREATENS TO HAMPER AND DISCOURAGE PROSPECTIVE CUSTOMERS."

TARA KELLY, EXECUTIVE DIRECTOR, RAFFL

Rutland County ranks high for food insecurity and adult obesity. The new 24,000 square-foot *Vermont Foodbank Rutland Distribution Center* expands the Foodbank's commitment to Rutland County. RAFFL has worked with the Foodbank and many other local organizations to provide surplus food gathered by their *Glean Team*. The *Vermont Farmers Food Center* runs a winter farmers' market, organizes community events, and piloted a *Heath Care Share Program* that provided weekly shares of local vegetables to people who struggle with food insecurity and chronic health issues affected by diet.

The number of dairy farms in Rutland County has decreased over the past 15 years, but *Thomas Dairy* has helped keep some of these farms in business by aggregating milk from ten farms under their label. Food manufacturers in the region (e.g., *Westminster Crackers* and *Mountain Cider Company*) are generally smaller in scale than other regions. Retail jobs make up most of the food system jobs in the area.

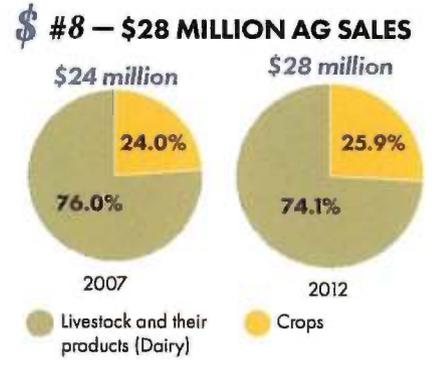
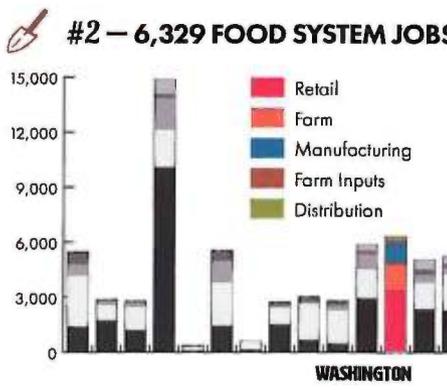
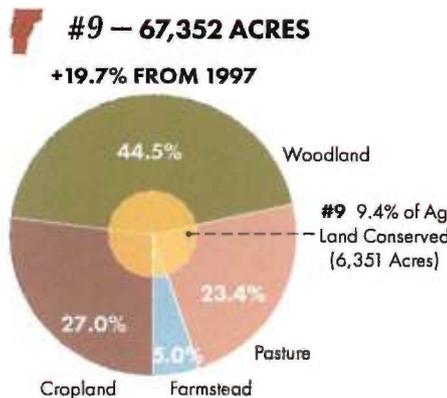
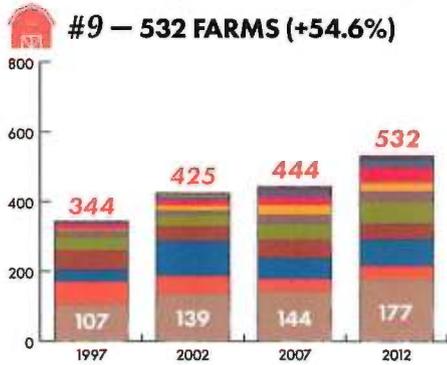
farmtoplate NETWORK ACTIVITIES

The Farm to Plate Network is working to develop, launch, and administer a statewide local food campaign to increase purchases, participation and awareness in Vermont's local food economy. Messaging will be targeted to outdoor enthusiasts, working professionals, and value-driven shoppers in different Vermont regions to increase consumer demand for local food at restaurants, institutions, direct sale farms and outlets, and at retail stores. To increase local food purchases by these consumers, a statewide marketing campaign will tap into family, leisure, health, sustainable lifestyles, and independence motivations.

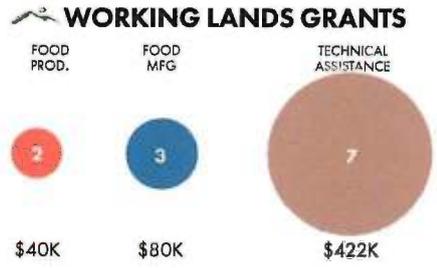


CLICK ON MAP FOR MORE INFO ABOUT RUTLAND COUNTY

Washington County



- VBM 100+**
RANKED BY REVENUE
1. KEURIG GREEN MOUNTAIN: \$4.52 BILLION
- RANKED BY EMPLOYEES
4. KEURIG GREEN MOUNTAIN: 2,196
 22. CABOT CREAMERY COOPERATIVE: 683
 92. NEW ENGLAND CULINARY INST: 220



Visitors to Central Vermont are familiar with the "Route 100 Sampler Tour," with snack stops at Vermont's #1 tourist destination, the Ben & Jerry's Factory Tour, the Cabot Annex Store, and Cold Hollow Cider Mill. Retail jobs, including many farm to plate dining options like Hen of the Wood and Kismet, help Washington County rank #2 in food system jobs. Although there are fewer farms and less agricultural land than in most counties, several of the largest food processors in the state are located here: Keurig Green Mountain, Ben and Jerry's, and Cabot Cooperative Creamery.



Flywheel Farm (Woodbury) is a small livestock and diversified organic vegetable farm.

The Mad River Food Hub (Waitsfield) is a processing and storage facility that has incubated dozens of small-scale producers. They offer the Vermont Equipment Access Program (VEAP) in partnership with the Center for an Agricultural Economy and the Vermont Community Loan Fund. VEAP is a revolving loan fund that helps fund the purchase of food processing equipment for clients at these two facilities.

"THE AWARENESS OF OUR FOOD WASTE AND THE NEED FOR HEALTHY NUTRITION IN OUR COMMUNITIES CREATES AN OPPORTUNITY FOR THE REDISTRIBUTION OF QUALITY FOOD TO ORGANIZATIONS THAT CAN DISTRIBUTE THEM. THE CHALLENGE IN THIS EFFORT IS THE COORDINATION OF TRANSPORTING FOOD TO LOCATIONS WHERE IT CAN BE EASILY ACCESSED."
LISA RANSOM, OWNER, GROW COMPOST

Washington County is also home to the New England Culinary Institute, training the next generation of chefs, and the Community Kitchen Academy—a partnership between the Vermont Foodbank and Capstone Community Action—a workforce development program teaching marketable skills to unemployed and underemployed Vermonters—boasting 90% job placement with 6 classes completed and 42 graduates.

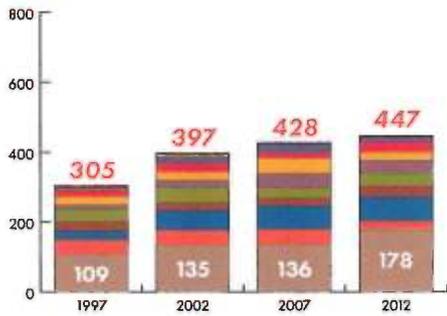
farmtoplate NETWORK ACTIVITIES

The Food Cycle Coalition Task Force (FCC) is focused on forming deeper connections between Universal Recycling implementation and food system organizations involved in food rescue. The FCC is creating a regional universal recycling assessment tool to help municipalities and charitable food system organizations better understand and coordinate their capacity to divert more food through activities such as food rescue. The group is in early discussions with Hunger Free Vermont and the Hunger Council of Franklin and Grand Isle Counties to develop and pilot the tool, which would then be available for statewide use.

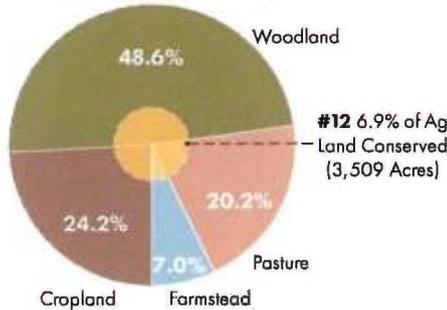


Windham County

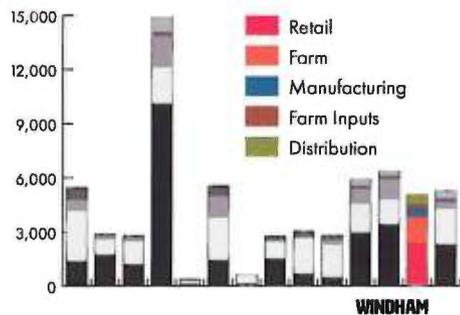
#10 — 447 FARMS (+46.6%)



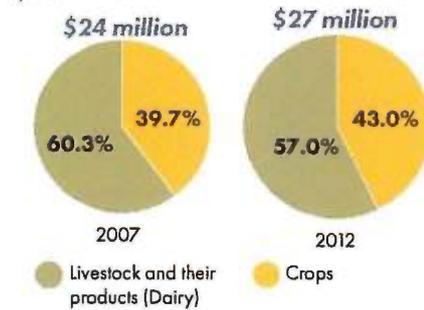
#11 — 50,765 ACRES (+8.4% FROM 1997)



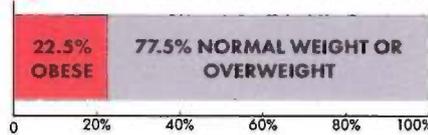
#7 — 5,048 FOOD SYSTEM JOBS



\$ #9 — \$27 MILLION AG SALES



#12 22.5% OF ADULTS OBESE



#6 5,790 13.1% OF POPULATION FOOD INSECURE

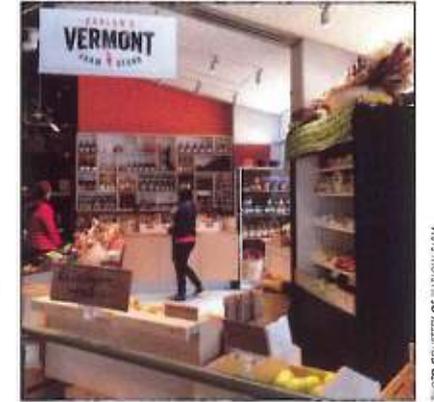
VBM 100+ RANKED BY REVENUE #110. AGAINST THE GRAIN GOURMET: \$14 M



Windham County ranks near the bottom of Vermont counties for farms, sales, and land in agriculture, but has the third highest number of vegetable farms and ranks second in both vegetable and fruit sales.

One of these farms, organic producer *Harlow Farm* (Westminster), has reached beyond the borders of Vermont to expand its business and that of other Vermont farm and food businesses at Boston Public Market, a year-round indoor market positioned in the heart of downtown Boston. *Harlow's Vermont Farmstand* features products from 22 Vermont farm and food businesses, including Windham compatriots *Dwight Miller Orchards* (Dummerston), *Green Mountain Orchards* (Putney), and *Grafton Village Cheese*.

Harlow's collaborative spirit is not limited to out of state efforts. The farm has been a key partner in *Food Connects* (Brattleboro) efforts to bring local products to institutional buyers and lower income families, helping to establish a distribution system that provides source verified local food to area institutions. Food Connects also runs the Neighborhood Market, which helps expand access to healthy, affordable, local food by pricing on an income-dependent sliding scale and accepting EBT cards. Food Connects recently received a \$38,000 USDA Rural Development grant to purchase a refrigerated delivery truck that will allow them to expand delivery from three to five days a week and reach more institutional buyers such as the Bellow Falls Union High School.



Harlow's Vermont Farmstand opened at the Boston Public Market in July 2015, offering products from 22 Vermont companies.

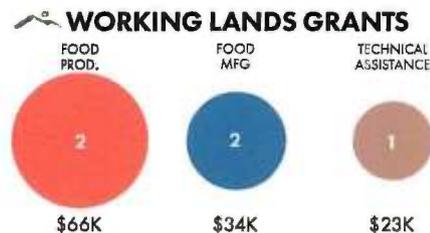
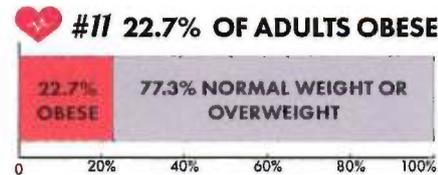
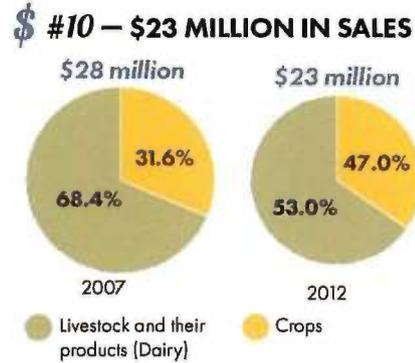
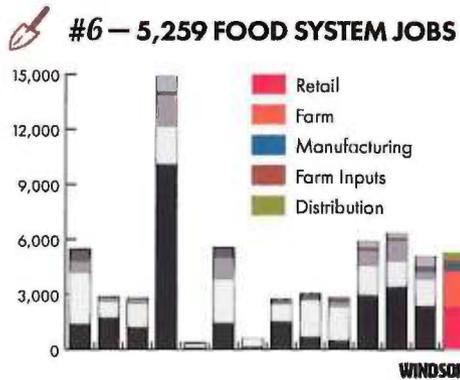
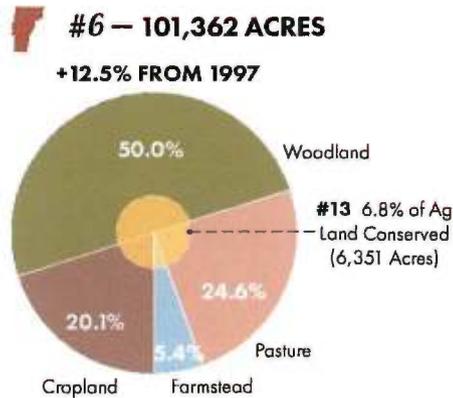
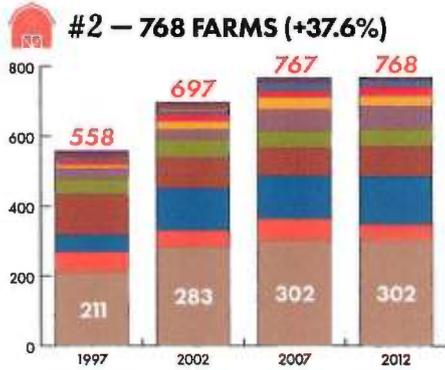
"FARM TO PLATE HAS PROVIDED AN ACCESSIBLE VENUE FOR GROUPS LIKE FOOD CONNECTS TO ENGAGE IN VALUABLE CROSS-SECTOR RELATIONSHIPS THAT HAVE RESULTED IN SIGNIFICANT CHANGES IN HOW WE WORK TO ACCOMPLISH OUR MISSION. FARM TO PLATE HAS HELPED US BUILD OUR OWN ORGANIZATIONAL CAPACITY BY ASKING BETTER QUESTIONS, DEVELOPING STRONGER RELATIONSHIPS AND DELIVERING MORE RELEVANT PROGRAMMING FOR A LARGER IMPACT. FARM TO PLATE MAKES US SMARTER."
 RICHARD BERKFIELD, EXECUTIVE DIRECTOR, FOOD CONNECTS

farmtoplate NETWORK ACTIVITIES

The newly updated *food security section* of the Farm to Plate Strategic Plan focuses on how Vermont can scale up existing innovative food programs, expand farm to school programs, and assess the capacity to store, process, or aggregate local/regional fresh food for institutions and charitable food sites.



Windsor County



Though Windsor County is home to world-famous *King Arthur Flour* and boasts the 2nd highest number of farms in Vermont, the county's food system economy is defined more by the presence of two of the state's largest food distributors. With convenient access to Interstate 91, *Black River Produce*, which employs 187 people and generated \$75 million in revenue in 2015 and *Upper Valley Produce* provide critical distribution services to in-state and regional retail and institutional markets.

Black River Produce has also played a pivotal role in developing Vermont's meat processing capacity by opening a state-of-the-art USDA inspected meat slaughtering and processing facility. They have created their own brand, *Black River Meats*, which worked with 11 beef, 4 pork, and 2 lamb producers in Windsor County alone in 2015. The facility is leased to operator *Vermont Packinghouse*, which employs around 50 workers who slaughter and process cattle, hogs, sheep, and goats and adhere to industry leading humane livestock handling practices.

Vital Communities recently launched *Valley Farm Fresh*, a new regional website and marketing campaign that makes it easier for consumers to connect with Upper Valley farms and local food products.



The Kennett family represents three generations of dairy farmers at Liberty Hill Farm (Rochester) – a popular farm stay destination.

"WHILE THE LOCAL FOOD ECONOMY IS GROWING IN WINDSOR COUNTY, ITS PRODUCERS ARE DEPENDENT ON SELLING THEIR PRODUCTS OUTSIDE OF THEIR DIRECT MARKETPLACE DUE TO THE HIGHER COSTS ASSOCIATED WITH THEM. THE RESTAURANTS IN HIGHER TOURISM AREAS ARE ON BOARD WITH THE LOCAL FOOD SCENE, BUT THERE ARE SIGNIFICANT NUMBERS OF RESTAURANTS THAT ARE TRYING TO SERVICE A LOW AND MEDIUM INCOME RANGE OF CUSTOMERS AND THEREFORE DO NOT SEE THE VALUE IN SERVING AND MARKETING LOCAL PRODUCTS."

SEAN BUCHANAN, BLACK RIVER PRODUCE/MEATS

farmtoplate NETWORK ACTIVITIES



Slow Money Vermont aims to inform, inspire and connect individuals, businesses, philanthropists, and investors interested in building a sustainable local and regional food system and to catalyze new investment opportunities in the people, businesses and communities that contribute to a sustainable food economy. Seven food entrepreneurs presented at the first Slow Money Vermont Entrepreneur Showcase event in May 2015 in White River Junction. Presenter

Cobb Hill Frozen Yogurt secured financing after the Showcase, enabling them to double production capacity.



CLICK ON MAP FOR MORE INFO ABOUT WINDSOR COUNTY

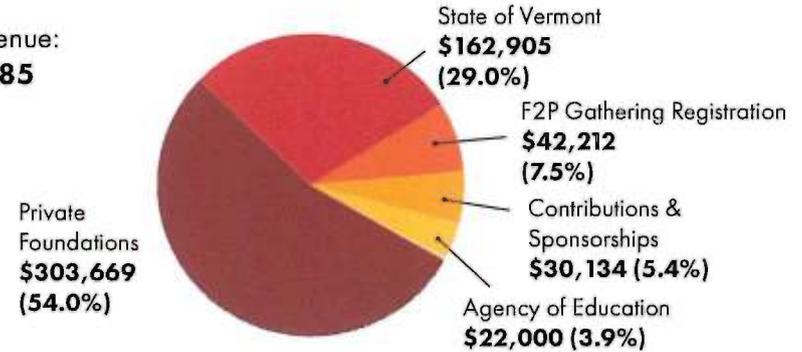
Farm to Plate Investment Program Financial Report

Actual Revenue and Expenses July 1, 2014 - June 30, 2015 (FY15)

Revenue	
Private Foundations	\$303,669
State of Vermont	\$162,905
Agency of Education (federal funds)	\$22,000
F2P Gathering Registration	\$42,212
Contributions and Sponsorships	\$30,134
Other Revenue	\$1,365
Total Revenue Received	\$562,285
Expenses	
General F2P Operations	
Administration	\$50,518
PR/Marketing/Outreach	\$12,259
Travel	\$7,603
Total F2P General Operations	\$70,380
Total F2P Personnel	\$257,526
F2P Projects	
Farm to Plate Network Meetings/Gathering	\$100,189
Working Group/Task Force Chair Stipends	\$54,744
Independent Grocers Project	\$18,053
Farm to Plate Website	\$12,960
Food System Professional Learning Community (teachers)	\$10,621
F2P Network Grants	\$9,995
On-Farm Energy Case Studies Project	\$4,945
Financing Case Study Development	\$4,048
Slow Money Vermont	\$1,847
Network Member Stipends	\$1,340
Total F2P Project Operations	\$218,742
Total Expenses	\$546,648

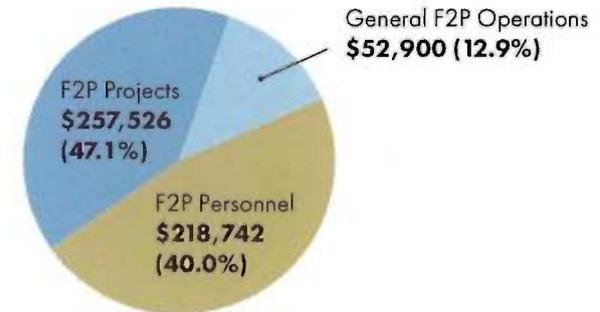
Farm to Plate Investment Program Revenue

Total Revenue:
\$ 562,285



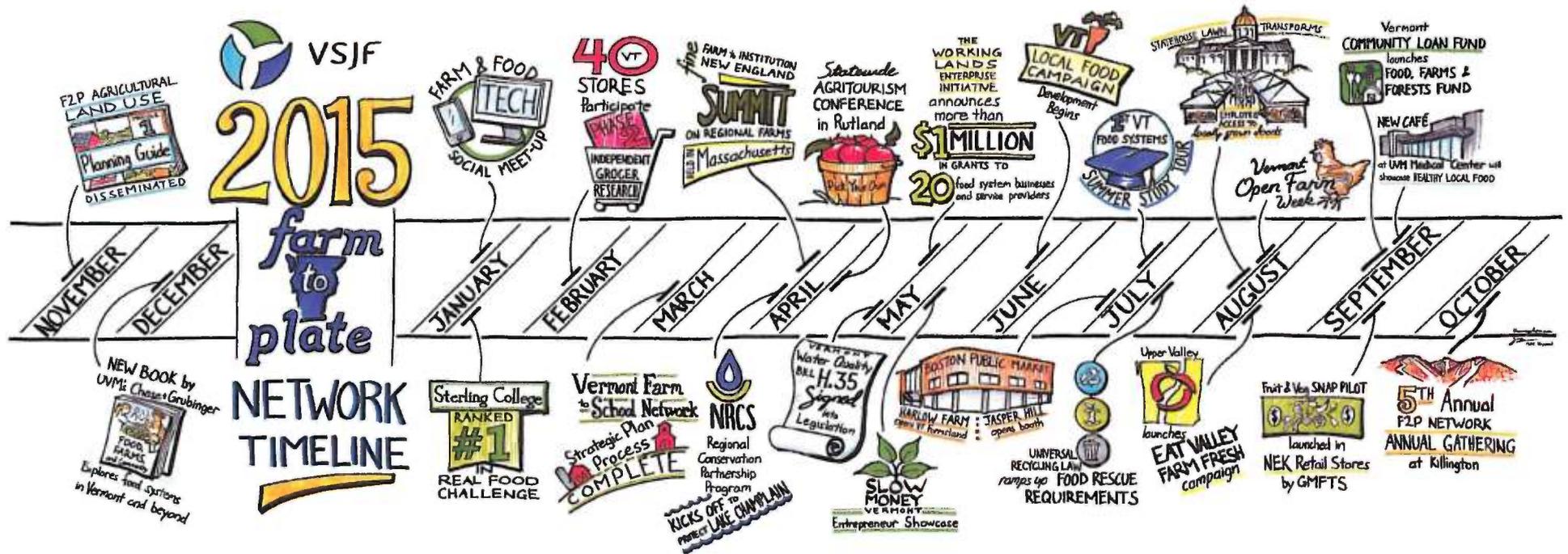
Farm to Plate Investment Program Expenses

Total Expenses:
\$544,654



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 • Claneil Foundation • High Meadows Fund • multiple corporate sponsors



WWW.VTFARMTOPATE.COM

SOURCES:

Number of Farms: *USDA Census of Agriculture*

Agricultural Sales: *USDA Census of Agriculture*

Land in Agriculture: *USDA Census of Agriculture*

Adult Obesity (2015): *County Health Rankings* (from Centers for Disease Control and Prevention) – Obesity refers to body mass index above 30.

Food Insecurity (2013): *Feeding America—Map the Meal Gap* – Food insecurity refers to reports of reduced quality, variety, or desirability of diet; disrupted eating patterns; and reduced food intake.

Food System Jobs (2014): *Vermont Department of Labor, U.S. Bureau of Labor Statistics, U.S. Nonemployer Statistics, USDA Census of Agriculture.* These data sources undercount number of jobs because some classification codes are suppressed at the county level

VBM +100 (2015): *Vermont Business Magazine* ranking by business revenue and employment based on survey responses.

Vermont Working Lands Grants (2013-2015): *Working Lands Enterprise Initiative Funded Projects.*

INTERPRETING VALUE ADDED FOOD MANUFACTURING: The *Annual Survey of Manufactures* provides estimates of "value added" manufacturing, which is derived by subtracting the cost of materials, supplies, containers, fuel, purchased electricity, and contract work from the value of shipments (products manufactured plus receipts for services rendered). The result of this calculation is adjusted by the addition of value added by merchandising operations (i.e., the difference between the sales value and the cost of merchandise sold without further manufacture, processing, or assembly) plus the net change in finished goods and work-in-process between the beginning- and end-of-year inventories. "Value added" avoids the duplication in the figure for value of shipments that results from the use of products of some establishments as materials by others. Value added is considered to be the best value measure available for comparing the relative economic importance of manufacturing among industries and geographic areas.



Click on any graphic or image in the document for more information!

EXPLORE

VERMONT'S FOOD SYSTEM

CONSUMER DEMAND



FARM INPUTS



FOOD PRODUCTION



FOOD PROCESSING



WHOLESALE DISTRIBUTION



RETAIL DISTRIBUTION



NUTRIENT MANAGEMENT



FOOD SECURITY



FOOD SYSTEM EDUCATION



WORKFORCE DEVELOPMENT



TECHNICAL ASSISTANCE



FINANCING



RENEWABLE ENERGY



REGULATION



LEADERSHIP

