



# CONNECTING THE DOTS

## *Leveraging the Food System for Rural Economic Development*



### PANELISTS

- Jake Claro, Vermont Sustainable Jobs Fund, Farm to Plate Director
- Liz Ruffa, Merck Forest and Farmland Center, Advancement Director
- McKenna Hayes, Food Connects, Food Hub Director

### MODERATOR

- Richard Berkfield, Food Connects, Executive Director

Sponsored by





---

**VERMONT'S FOOD SYSTEM ECONOMY: HIGHLIGHTS**

---

## WHAT IS FARM TO PLATE?

**Farm to Plate is Vermont's legislatively enable food system plan being implemented statewide to:**

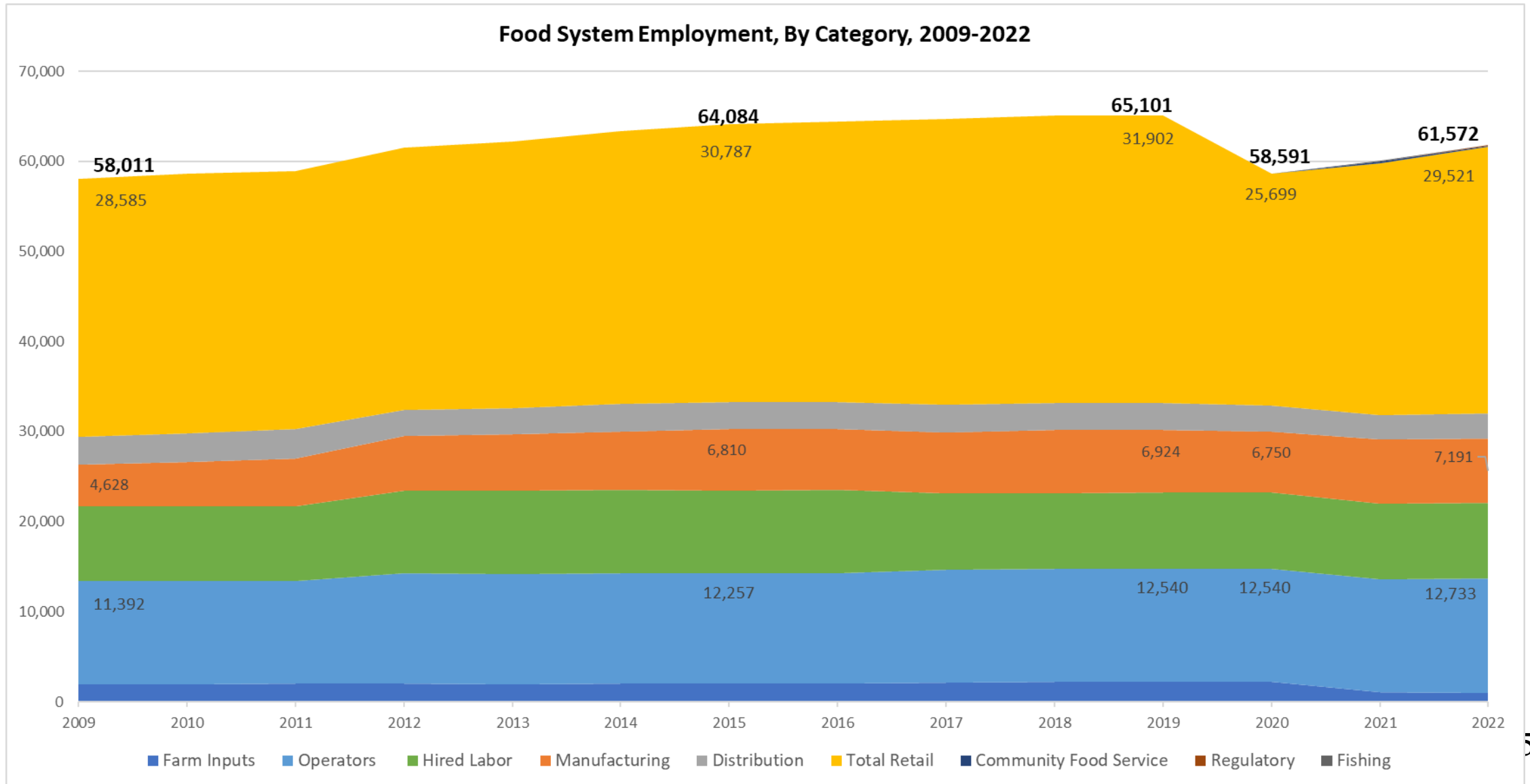
1. Increase economic development and jobs in the farm and food sector
2. Improve soils, water, and resiliency of the working landscape in the face of climate change
3. Improve access to healthy local foods for all Vermonters

---

# WHAT DO WE MEAN BY FOOD SYSTEM?



# HOW MANY PEOPLE DOES THE FOOD SYSTEM EMPLOY?



## WHAT IS THE ECONOMIC IMPACT IN \$?

### » Economic Impact of Vermont's Food System, 2017

	2017 Employment	% of Total	Growth from 2007- 2017	2017 Sales	% of Total	Growth from 2007- 2017
Agriculture	21,700	35.4%	0.6%	\$704,405,500	4.9%	1.5%
Fisheries	0	0.0%	0.0%	\$0.00	0.0%	0.0%
Food Manufacturing	4,806	7.8%	2.3%	\$2,788,294,100	19.6%	0.2%
Beverage Manufacturing	867	1.4%	11.8%	\$240,740,000	1.7%	0.7%
Wholesaling + Distributing	3,530	5.7%	1.2%	\$7,132,355,700	50.1%	11.7%
Stores	9,871	16.1%	0.4%	\$2,178,873,100	15.3%	-0.7%
Food Services + Drinking Places	20,555	33.5%	0.4%	\$1,206,743,600	8.5%	1.4%
<b>TOTAL</b>	<b>61,338</b>	<b>100.0%</b>	<b>0.7%</b>	<b>\$14,251,411,900</b>	<b>100.0%</b>	<b>4.3%</b>

**Annual  
growth rate  
of 4.3%  
since 2007**

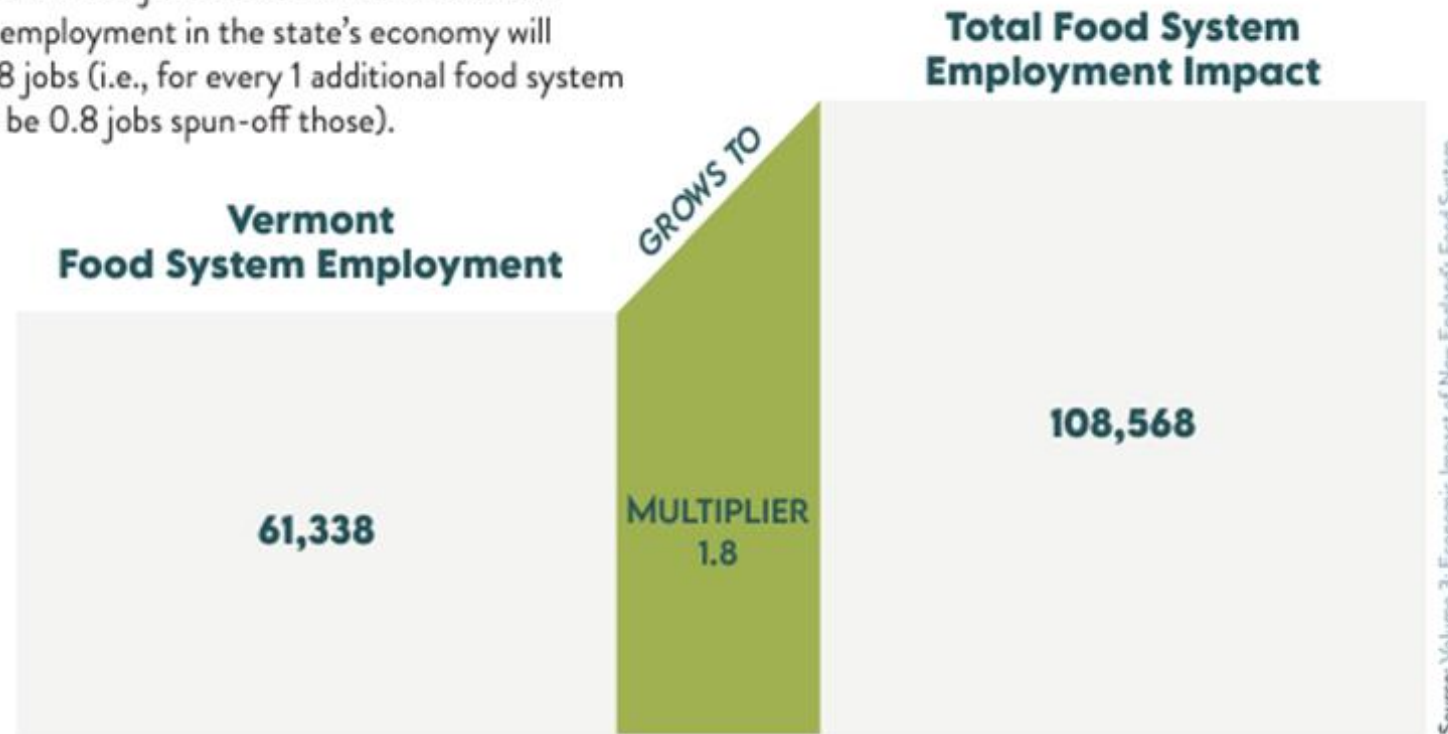
Source: [Volume 3: Economic Impact of New England's Food System](#). Note: Agriculture sales in this table includes support activities. Sales values are adjusted for inflation to 2020 dollars. Agricultural sales are adjusted using producer price indices for crops and livestock.

---

## AND THERE'S A MULTIPLIER EFFECT!

### » Food System Employment Multiplier

The employment multiplier calculated in Volume 3 shows that for each additional job created in Vermont's food system, total employment in the state's economy will increase by 1.8 jobs (i.e., for every 1 additional food system job, there will be 0.8 jobs spun-off those).



The additional 0.8 job (in aggregate) is actually a set of fractional jobs spread over the entire economy, the result of linked activity in other food system and nonfood system sectors. These include jobs in transportation, utilities, finance, trade, and government.

## AND THERE'S A MULTIPLIER EFFECT!

TABLE B20: Vermont Employment Multipliers, 2017

State	Output	
	Type I	Type II
Oilseed	1.36	2.89
Grain	1.59	2.07
Fruit	1.11	1.28
Vegetables	1.22	1.45
Greenhouse	1.11	1.35
All Other Crops	1.04	1.11
Cattle Ranching	1.20	1.43
Dairy Cattle and Milk	1.96	2.52
Other Animal Production	1.02	1.31
Poultry and Eggs	1.82	2.24
Agriculture Support	1.03	1.19
Fisheries	NA	NA
Animal Food	2.67	3.71
Grain and Oilseed Milling	2.79	3.49
Sugar and Confectionary	2.50	3.19
Fruit and Vegetable Preserving	1.97	2.54
Fluid Milk	4.60	6.18
Cheese	4.55	6.16
Other Dairy	3.04	4.13
Animal Slaughtering	4.59	5.69
Seafood	NA	NA
Bakeries and Tortilla Mfg.	1.34	1.68
Other Food Manufacturing	4.50	5.49
Breweries	1.85	2.46
All Other Beverages	2.11	2.76
Grocery Wholesaling	1.66	2.28
Misc. Nondurable Wholesaling	1.91	2.60
Food and Beverage Retailing	1.20	1.44
Food Serv. and Drinking Places	1.16	1.38
<b>VERMONT</b>	<b>1.44</b>	<b>1.77</b>

*“From the size of the Type I multipliers, we conclude that food system production in Vermont is more closely integrated relative to the other states when not considering labor consumption effects (i.e., not including induced effects that primarily stimulate food retailing). The interindustry non-retail production linkages are somewhat stronger here.” NEFNE Volume 3: Economic Impact of New England’s Food System*

TABLE B21: Vermont Value-Added Multipliers, 2017

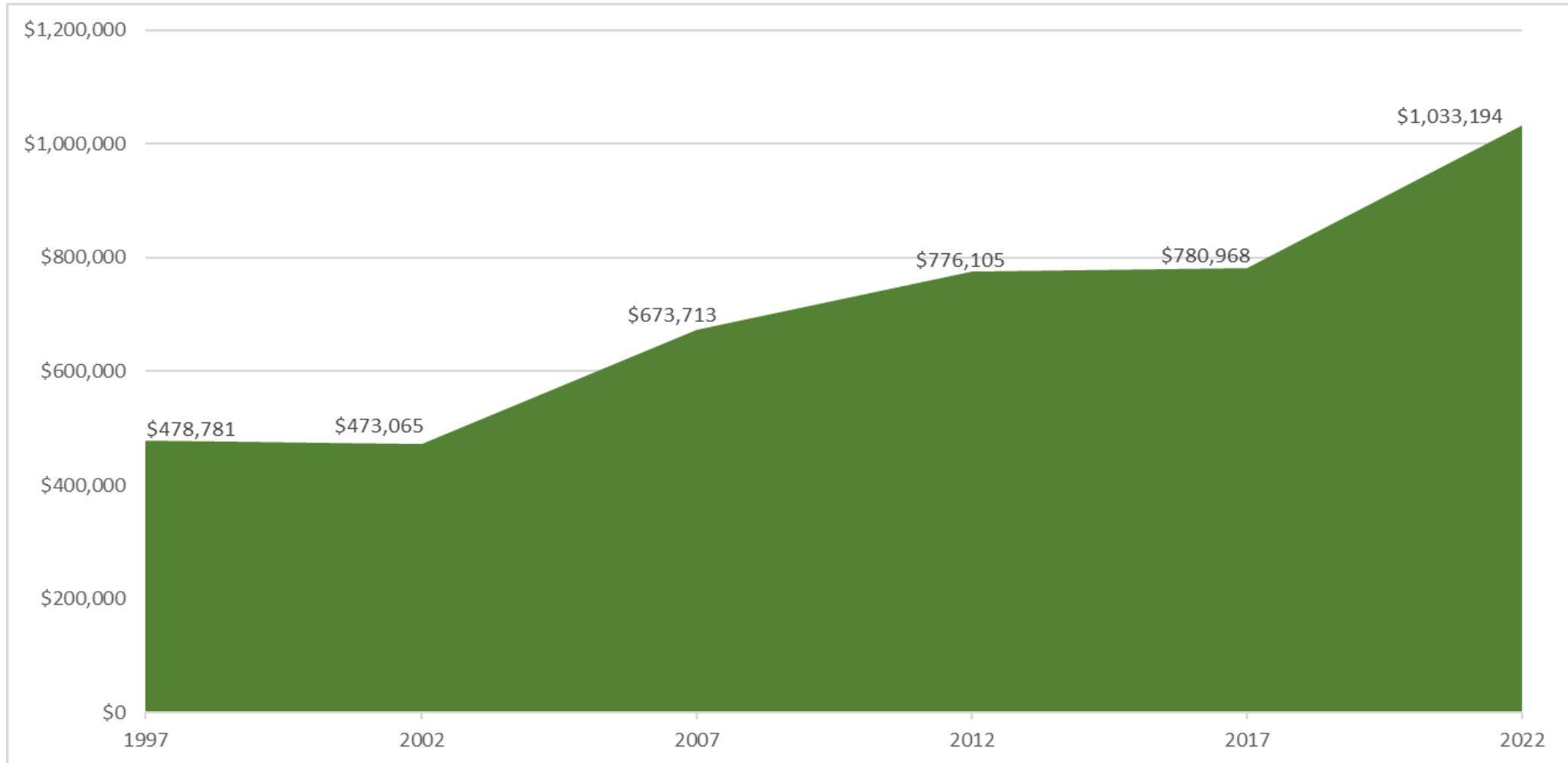
State	Output	
	Type I	Type II
Oilseed	1.04	1.40
Grain	1.26	1.70
Fruit	1.18	1.54
Vegetables	1.08	1.41
Greenhouse	1.10	1.49
All Other Crops	1.15	1.57
Cattle Ranching	1.21	1.56
Dairy Cattle and Milk	1.72	2.22
Other Animal Production	1.01	1.37
Poultry and Eggs	1.88	2.33
Agriculture Support	1.17	2.05
Fisheries	NA	NA
Animal Food	2.38	3.15
Grain and Oilseed Milling	3.40	4.36
Sugar and Confectionary	2.94	4.03
Fruit and Vegetable Preserving	2.27	3.03
Fluid Milk	4.16	5.52
Cheese	4.41	5.92
Other Dairy	2.96	3.96
Animal Slaughtering	4.73	6.23
Seafood	NA	NA
Bakeries and Tortilla Mfg.	1.68	2.33
Other Food Manufacturing	3.08	4.18
Breweries	1.70	2.13
All Other Beverages	1.81	2.21
Grocery Wholesaling	1.60	2.17
Misc. Nondurable Wholesaling	1.50	1.91
Food and Beverage Retailing	1.37	1.86
Food Serv. and Drinking Places	1.33	1.75
<b>VERMONT</b>	<b>1.67</b>	<b>2.23</b>



---

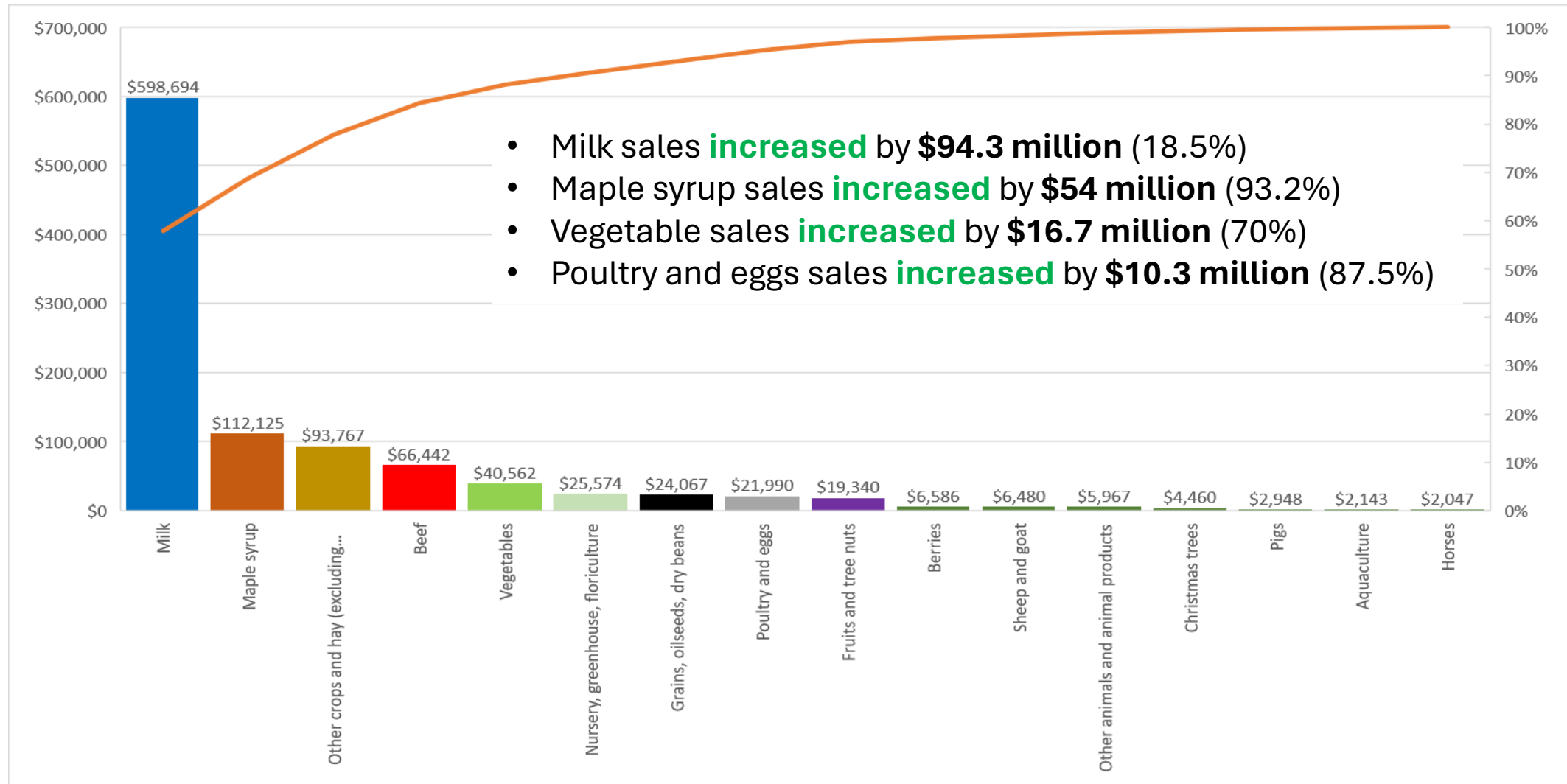
## ECONOMICS:

### VALUE OF AGRICULTURAL PRODUCTS SOLD, 1997-2022 (IN \$1,000)



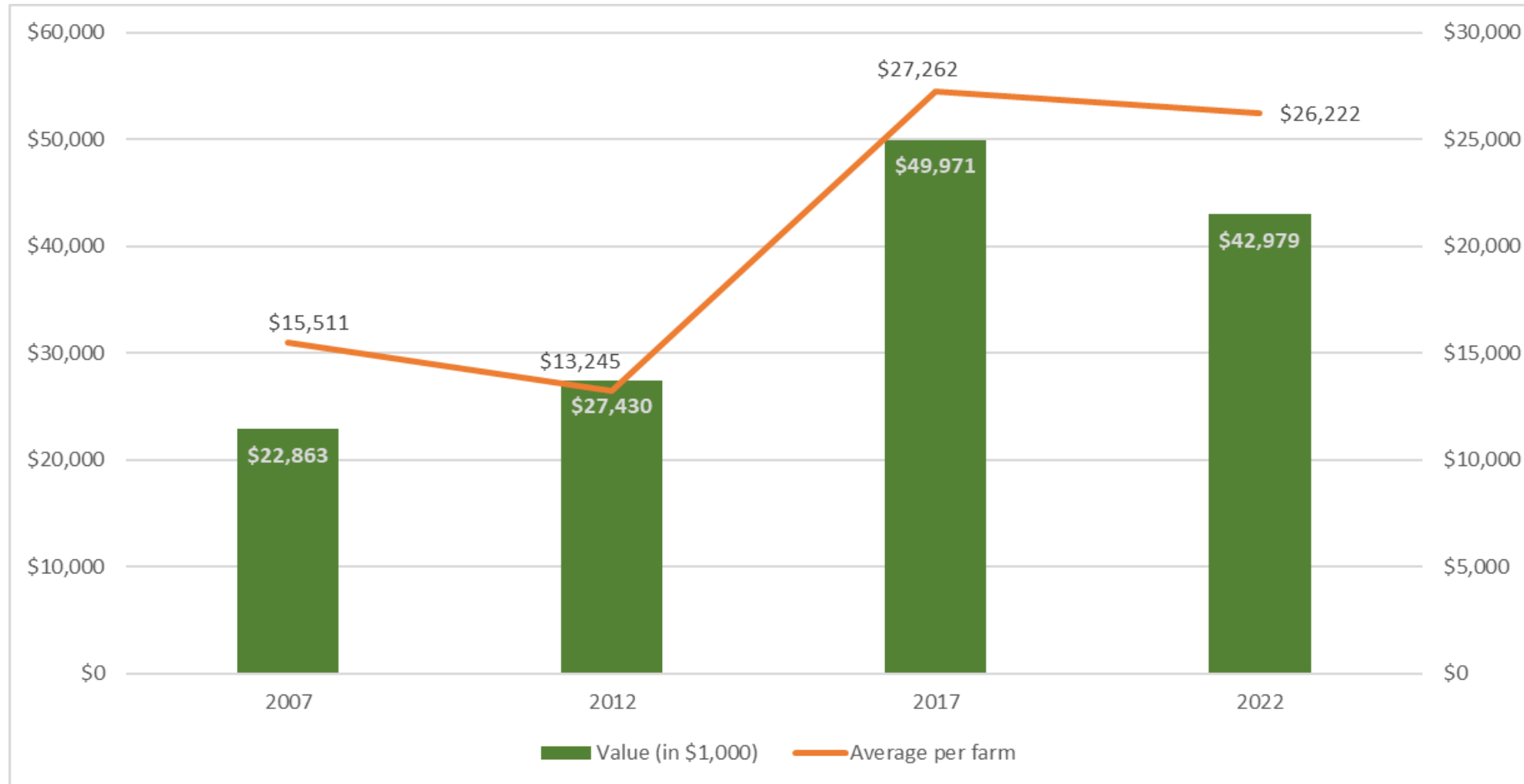
## ECONOMICS:

### VALUE OF AGRICULTURAL PRODUCT SALES BY COMMODITY/COMMODITY GROUP, 2022 (IN \$1,000)



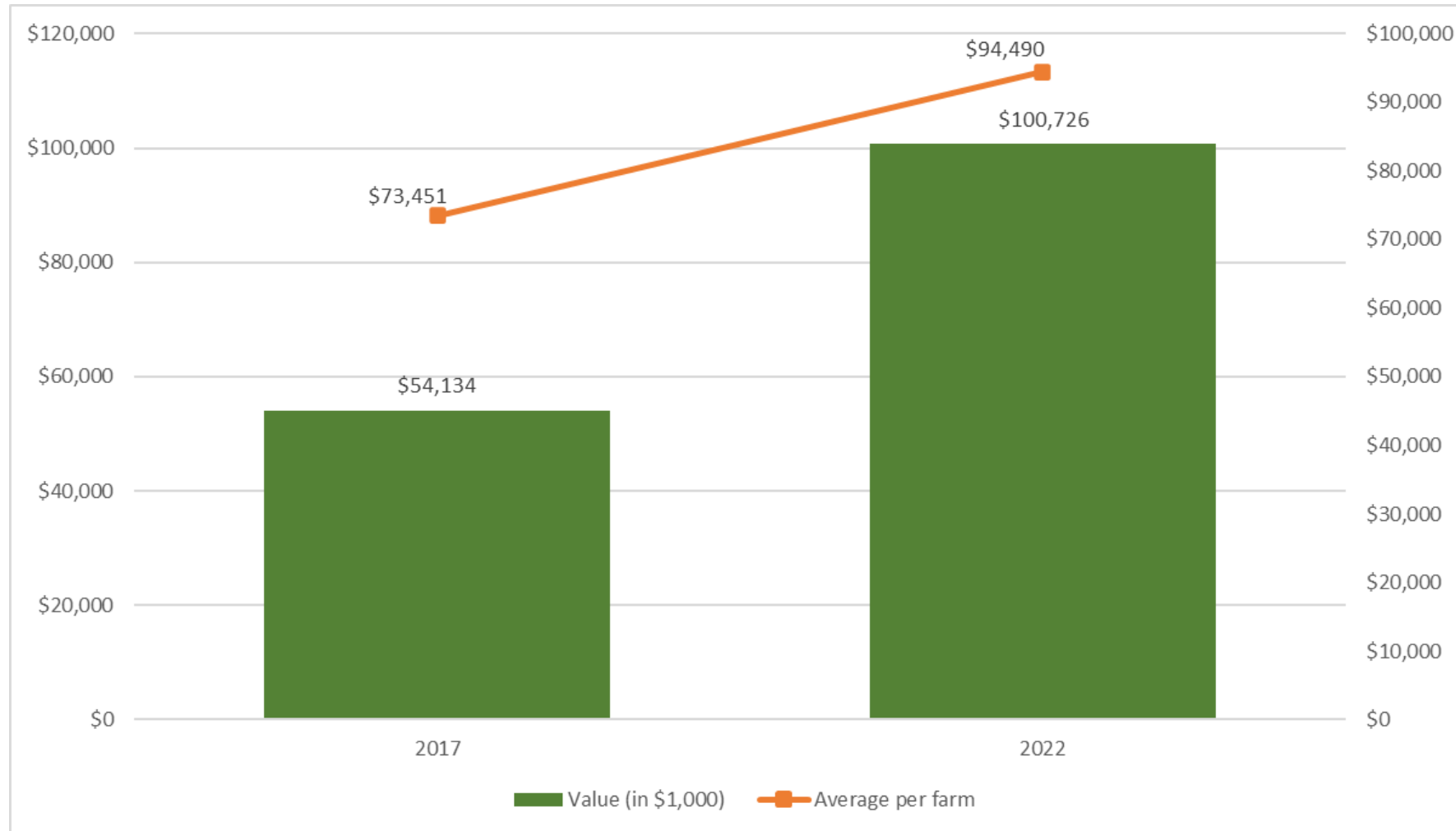
## ECONOMICS:

### VALUE OF AGRICULTURAL PRODUCTS SOLD DIRECTLY TO CONSUMERS, 2007-2022 (IN \$1,000)



## ECONOMICS:

VALUE OF AGRICULTURAL PRODUCTS SOLD DIRECTLY TO RETAIL MARKETS, INSTITUTIONS, AND FOOD HUBS, 2017-2022 (IN \$1,000)



An  
**increase**  
of  
**86%/\$46.6**  
**million**

---

## ECONOMICS:

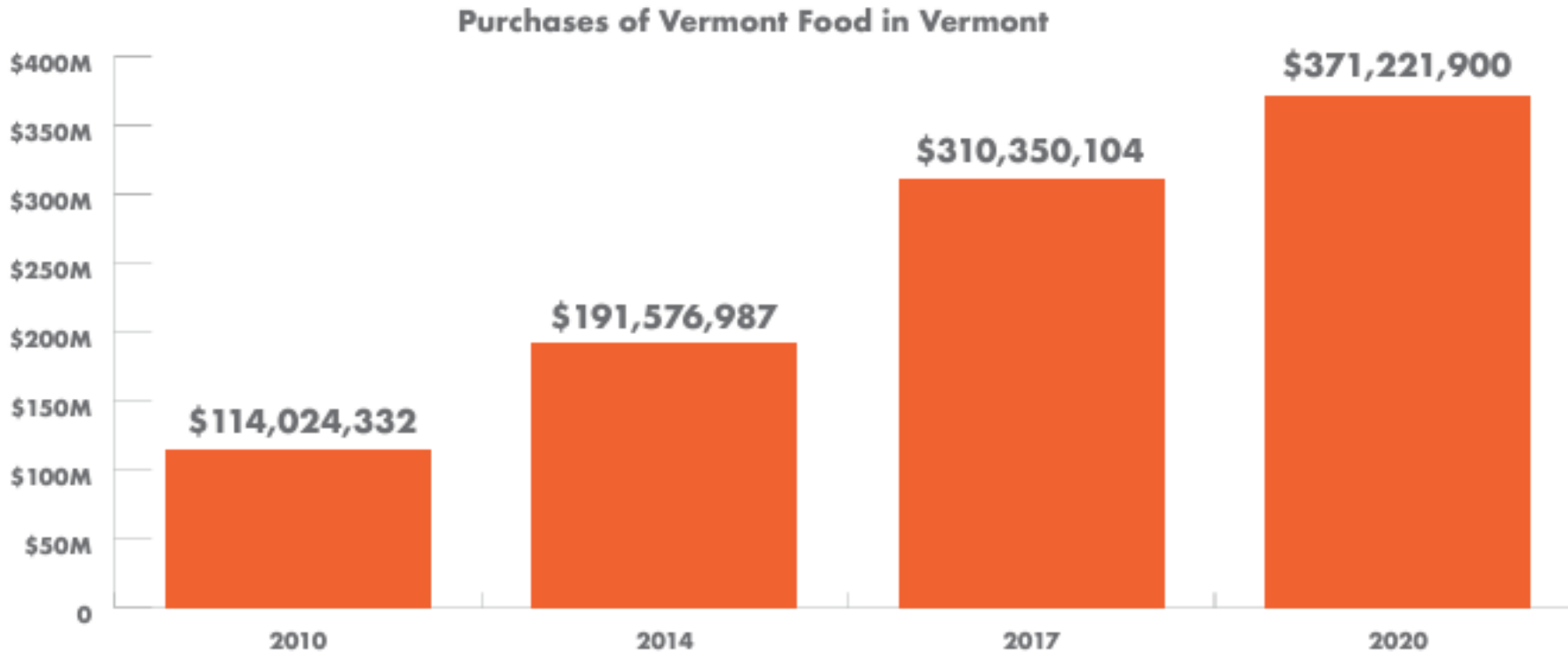
### VALUE OF DIRECT SALES COMBINED, 2017-2022 (IN \$1,000)



---

## ECONOMICS:

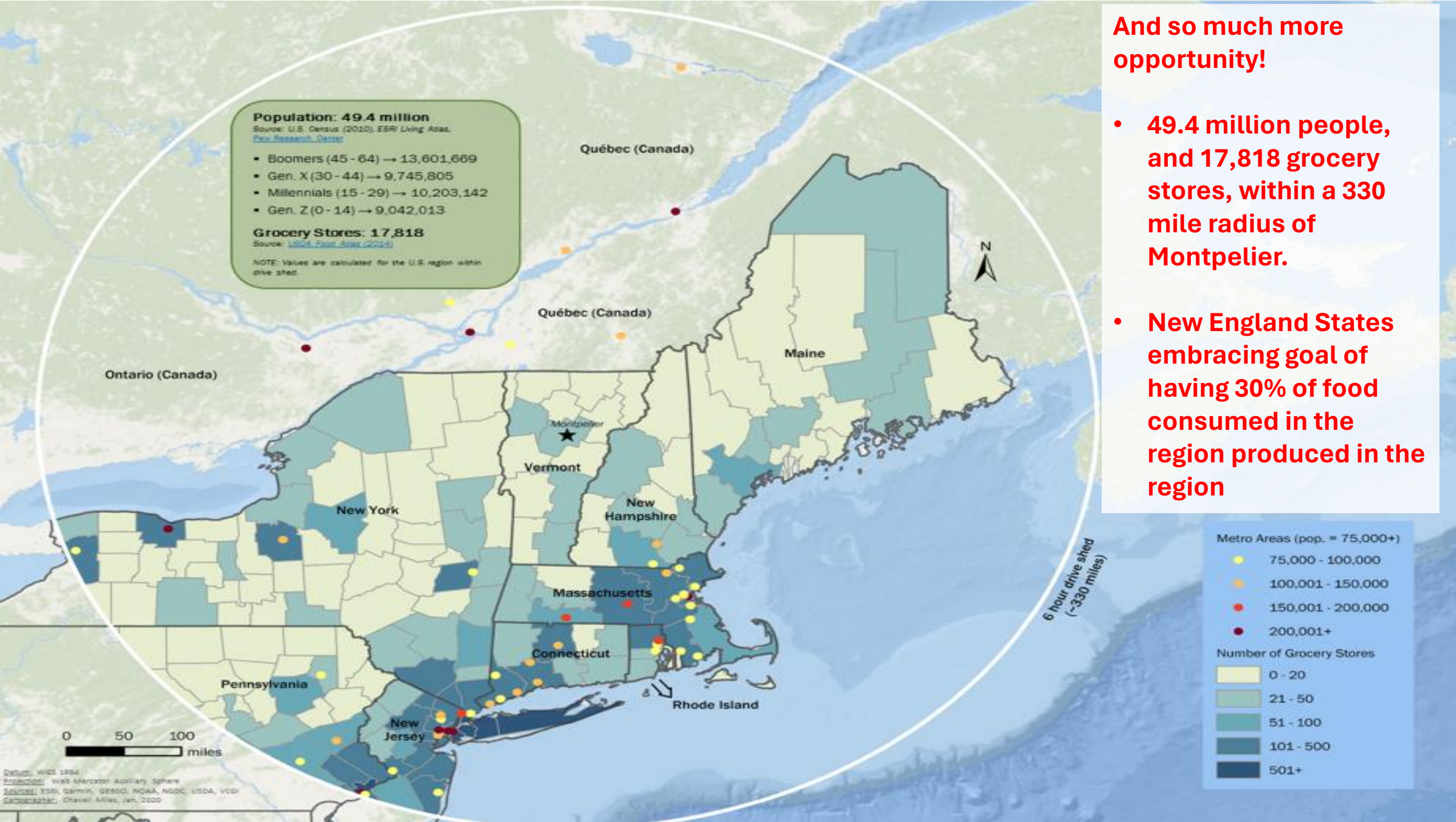
### VALUE OF LOCAL FOOD SALES IN VERMONT (RAW AND PROCESSED)



**Local food makes up 16.1% of all food purchases within Vermont**

**And so much more opportunity!**

- 49.4 million people, and 17,818 grocery stores, within a 330 mile radius of Montpelier.**
- New England States embracing goal of having 30% of food consumed in the region produced in the region**





## NEXT UP

- *Emerging Leaders Awards, 12:00 p.m. - 12:20 p.m.*
- *Buffet Lunch, 12:30 p.m. - 1:30 p.m.*
- *Mid-afternoon Breakouts, 1:40 p.m. - 2:55 p.m.*

