

# NEW HAMPSHIRE

## LOCAL FOOD COUNT 2022





Volume 1:  
Estimating Resilient  
Eating Patterns

Volume 2:  
Estimating Production  
for 30% Regional Self-  
Reliance

Volume 3:  
Economic Impact of New  
England's Food System

**Volume 4:  
Understanding Market  
Channels and Food  
Expenditures**

» **Local Food Count**

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## What would it take for 30% of the food consumed in New England to be regionally produced by 2030?

What will it really take to grow, raise, produce, harvest, and catch more regional food and move it through a complex supply chain to our homes and other places we eat? What do we need to do in the near term, by 2030, to make tangible progress towards this bold goal? How might the increasing and escalating impacts of climate change impact our ability to feed ourselves? What can we do as a region to make our food system more equitable and fair, resilient and reliable? To answer these questions, the **New England Food System Planners Partnership**—a collaboration amongst seven state-level food system organizations, six-state agricultural, economic and environmental department representatives and Food Solutions New England—convened research teams to develop [New England Feeding New England](#).

A **Market Channels Team** ([Volume 4](#)) investigated what market channels offer the best opportunities for sourcing local and regional food products. The unsatisfying reality is that data for local and regional food purchases for most market channels in New England is *very limited*. This research brief details results from the **2022 Local Food Count**—an effort to estimate local food spending—which will serve as the *baseline* for two subsequent counts in 2025 and 2030 to assess changes in local food consumption by 2030.

This 2022 Local Food Count is necessarily a work in progress. For example, readers will notice that specific food product data (e.g., milk) is currently not available. Local food expenditure figures are also likely underestimates, but improved data responses in future years should lead to refinements in our results.

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# Why Local Food?

Why does choosing local food matter? After all, our state food systems and regional New England food system are embedded in a global food system that makes virtually every ingredient, product, and cuisine easily available to most Americans. Our grocery stores and restaurants are stocked and convenient.

As outlined in [Common Food System Challenges](#), enough risks to long-term food production are unfolding around the planet to warrant the question: If where our food comes from suddenly mattered, would New England be prepared with a reliable, safe, and abundant food supply? Purchasing local/regional food and beverages is really about supporting the communities and ecosystems we live in. By purchasing food and beverages from local/regional farmers, fishers, aquaculturists, processors, manufacturers, distributors, stores, and restaurants, New Englanders are investing in our shared future and building an insurance policy against food supply chain risks. Local/regional food can also be healthier, fresher, and more culturally appropriate.



[Volume 2, Estimating Production for 30% Regional Consumption](#), asked the question: Could the six New England states meet a goal of supplying 30% of the region’s food by 2030? The key insights of Volume 2 are estimates of regional food self-reliance (RSR)—how much food we produce compared to how much food we consume—for the major food groups. RSR percentages varied widely from food to food, showing a rather lopsided capacity for self-reliance. For example, New Englanders can reasonably expect to have access to many types of seafood, berries, maple syrup, dairy products, and a few more products, but less access to many more products. **A call to increase regional food spending must be met by increased regional food production.**

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## Inequity in Food Spending in New Hampshire

Everyone in New Hampshire—regardless of income, race, ethnicity, gender, location, citizenship status, language spoken, or physical ability—should be able to enjoy healthy, culturally-relevant local food from trusted sources. However, the ubiquity of unhealthy, ultra-processed foods goes hand-in-hand with unequal access to healthy, local food within our communities: from rural communities in Grafton County, to urban neighborhoods in Manchester, healthy, local food is easier to get for some people, but expensive or far away for others. For example, every dataset with demographic information illuminates meaningful differences in income and wealth, home ownership, health outcomes, food security, access to healthy food, and many other variables for Black, Hispanic, Indigenous, Asian, and other New Hampshire residents compared to White residents.

**A call to increase local/regional food spending must also recognize that a long history of systemic racism and discriminatory practices needs to be overcome.** Specifically, [occupational segregation](#) and [wage stagnation](#) need to be addressed, [social safety net programs](#) need to be augmented, and spatially discriminatory practices, like [supermarket redlining](#), need to be eliminated.



# Research Methods

## Finding the *Numerator*: Estimating Local Food Spending

From October through November 2023, state research associates (RAs) compiled a contact database through a combination of internet research and direct outreach to identify appropriate entity contacts for survey outreach and follow-up. Entities with a presence across the New England states were added to a regional database compiled and maintained by researchers. Simultaneously, an electronic survey to query organizations about their 2022 food purchasing was built using SurveyMonkey, an online survey platform.

$$\frac{\text{Local Food Spending}}{\text{Total Food Spending}} = \text{Percent Local}$$

The survey was distributed electronically to New Hampshire's contact list over the course of three months beginning in early December 2023 through mid-March 2024. Contacts received a survey link via email, as well as several follow-up emails from the state RAs to increase the likelihood of response. Depending on entity type, survey respondents were asked to provide their total and local food purchases or sales for calendar year 2022 across the food categories in Table 2. Survey recipients were provided with detailed instructions and food category definitions with each outreach effort. Due to resource constraints contact database development and survey outreach focused primarily on wholesale food suppliers, grocery chains, and institutional food providers such as colleges, public school districts, and hospitals and did not target the thousands of full-service or fast food restaurants across the region. Table 1 provides an overview of the composition of the contact database for this round.

**Table 1: Overview of New Hampshire Survey Contact List**

Organization Category	Number Identified	Contact Found	Opted Out	Email Bounced	Survey Sent
Assisted Living Facility	65	0	—	—	0
College/University	24	14	—	—	14
Correctional Facility	18	18	—	—	18
Distributor/Wholesaler	7	7	—	—	7
Early Education Center	755	720	8	25	712
Farmer with Direct Sales	56	56	—	3	53
Food Bank/Pantry	3	3	—	—	3
Grocer/Retailer	106	27	—	3	24
Healthcare Facility	48	39	—	11	28
K-12 Schools	192	125	—	5	120
Other	1	1	—	—	1
Restaurant	44	—	—	—	—
Trade Association	2	2	—	—	2
<b>TOTAL</b>	<b>1,321</b>	<b>1,012</b>	<b>8</b>	<b>52</b>	<b>982</b>

## Food Categories and Definitions

In order to accurately assess the prevalence of local food spending within the region, project researchers collected state-level data utilizing a shared definition of what constitutes “local” across different food types. The timeframe specified for this inaugural baseline count was calendar year 2022 and food types were defined by fifteen mutually exclusive categories. In the absence of alternative state methodologies defining local foods, Vermont’s codified standard for local food, as detailed in [State Act 129](#), served as the blueprint for local food in this project (i.e., New Hampshire data was requested based on the product definitions below). Table 2 details the food categories, how each was defined, and the criteria denoting their qualification as local.

**Table 2: Food Categories and Definitions**

Category	Product Definition	Locally Sourced Definitions
Meat + Meat Products	Any animal protein product composed of beef, pork, poultry, lamb, or game meats, not including dairy products, seafood, eggs, or plant-based meat substitutes.	<b>For meat, eggs, and dairy products:</b> » Meets the Universal Criteria and,
Dairy Products	Any fluid milk, cheese, cream, butter, ice cream, or yogurt product derived from the milk of cows, goats, sheep, or other animals.	» Derived from animals raised for one-third of its life (or one year, whichever is greater) and harvested in NH or New England
Eggs + Egg Products	Shell eggs or 100% egg products (e.g., bulk liquid eggs, frozen egg patties, etc.) derived from poultry birds only.	
Seafood + Seafood Products	Any animal protein product composed of finfish, shellfish, or mollusks (e.g., fresh haddock, smoked salmon, canned tuna, live lobster, frozen scallops, etc.).	<b>For seafood:</b> » Meet the Universal Criteria and, » Harvested in New England waters
Fresh Fruits + Vegetables	Raw, unprocessed fruit or vegetable, not including grains, grasses, nuts, seeds, or fruit or vegetable juices.	<b>For fresh fruits and vegetables:</b> » Meets the Universal Criteria and, » Grown in NH or New England
Processed Fruits + Vegetables	Canned, frozen, or dried fruit or vegetables, including 100% juices, not including any grains, grasses, nuts, seeds, or fruit-flavored beverages that are not 100% fruit or vegetable juice.	<b>For all other food categories:</b> » Meets the Universal Criteria and,
Grain Products + Baked Goods	Grains and processed grain-based products including breads, rolls, tortillas, flours, cakes, cookies, or other baked goods.	» Comprised of a majority (>50% by volume, excluding water) of ingredients grown or substantially processed in NH or New England, or
Alcoholic Beverages	Beer, wine, spirits, or beverages with an alcohol content greater than 0.5% alcohol by volume.	» Manufactured by a company headquartered in New Hampshire or New England
Non-Alcoholic Beverages	Any beverage other than bottled water, cream, fluid milk, or 100% fruit or vegetable juice with an alcohol content of ≤ 0.5% alcohol by volume.	
Sweeteners	Sugar, molasses, corn syrup, honey, maple syrup/sugar, and other sweeteners.	
All Other Food Products	Foods including nuts and nut butters, chocolate, confections, coffee and tea products, or any other food item, excluding water, not included in any of the previous categories.	

**Universal Criteria:**

- » Meets the Product Definition
- » Sold in NH or New England

## Survey Results by Channel

The state survey generated 69 total responses across seven organization categories. Of those responses, 57 respondents provided both total and local purchasing data resulting in a **5.8% overall response rate**. Table 3 details survey responses for the state. Twenty-two K-12 school districts provided responses, representing 5.5% of students enrolled in the state. Those institutions indicated spending an average of 5.3% on regionally produced foods. Eighteen correctional facilities representing 83.1% of the state's carceral capacity provided complete data reporting average local sourcing rates of 2.3%. Six early education centers and six grocers provided complete data reporting average local sourcing rates of 52.9% and 6.6% of total purchases, respectively. Three colleges and universities provided complete data indicating average sourcing of 16.0% of total purchases from regional producers. **Overall, average local sourcing accounted for 6.6% of total reported purchases.** However, no complete responses were received from distributors, healthcare facilities, K-12 schools, advocacy organizations, or trade associations despite outreach efforts. Survey results were used to inform the local percentages applied to state spending by market channel to estimate total local spending.

**Table 3: New Hampshire Survey Results**

Organization Category	Respondent Count	Provided Total Purchase Data	Provided Local Purchase Data	Response Rate <sup>a</sup>	% of State Total	Average Local % Reported
K-12 District	24	23	22	18.3%	5.5% <sup>b</sup>	5.3%
Correctional Facility	18	18	18	100.0%	83.1% <sup>c</sup>	2.3%
Early Education Center	13	8	6	0.8%	— <sup>d</sup>	52.9%
Grocer/Retailer	6	6	6	25.0%	16.6% <sup>e</sup>	6.6%
College/University	5	3	3	21.4%	7.7% <sup>b</sup>	16.0%
Healthcare Facility	2	2	1	3.6%	0.2% <sup>f</sup>	0.6%
Other	1	1	1	100.0% <sup>g</sup>	—	24.2%
<b>TOTAL</b>	<b>69</b>	<b>61</b>	<b>57</b>	<b>5.8%</b>	<b>—</b>	<b>6.6%</b>

a Refers to respondents providing both total and local purchase data divided by total surveys sent.

b Percentage of total SY21-22 student enrollment reported in by the National Center for Education Statistics; <https://nces.ed.gov/>

c Percentage of total carceral capacity; <https://www.corrections.nh.gov/locations/>; accessed May 6, 2024.

d Unknown or not applicable.

e Percentage of total grocer retail locations based USDA Supplemental Nutrition Assistance Program [retailer list](#) (accessed May 6, 2024) cross-referenced with chain retailer corporate websites.

f Percentage of inpatient bed capacity based on state lists maintained by US Centers for Medicare and Medicaid Services; <https://data.cms.gov/provider-data/dataset/xubh-q36u>; accessed May 6, 2024.

g After initial targeted outreach efforts failed to garner an adequate response, the survey was distributed more broadly to affiliate networks, who were encouraged to forward the survey to their contacts. Entities who responded to the survey via this channel were retroactively added to the contact database for outreach in subsequent counts.

### Two Important Caveats:

- » Where survey data were unavailable or unrepresentative, a local percentage based on the likely mix of foods offered by market channel was used to estimate local spending.
- » Due to resource constraints, we did not target the thousands of full-service or fast food restaurants across the region.

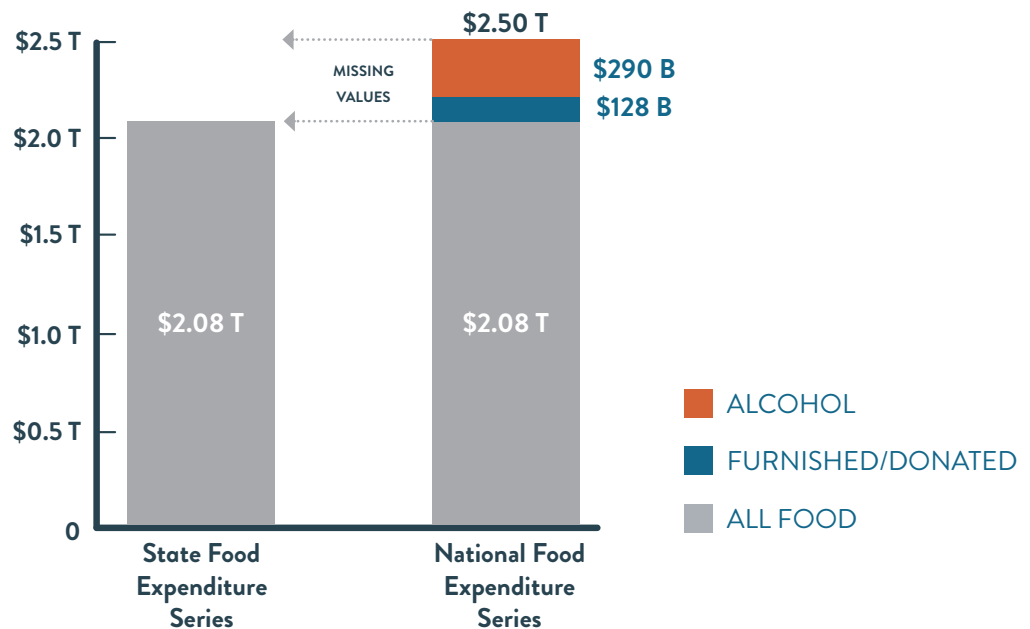
## Finding the *Denominator*: Estimating Total Food Spending

The United States Department of Agriculture (USDA) [Food Expenditure Series](#) (FES) was used to estimate our denominator: total food spending. The Food Expenditure Series provides *national* and *state-level* estimates but there are some important differences:

- » The **State Food Expenditure Series** currently provides food spending estimates by the value of food purchased to be eaten at home or away from home, but *not* by specific market channel.
- » The **National Food Expenditure Series** includes data about food produced at home and alcohol purchases, but the State Food Expenditure Series does *not*.

In other words, state-level spending estimates—which we might like to use as our denominator—undercount total food spending and do not estimate spending by market channels. We can see how much the State Expenditure Series undercounts state-level spending for all states by comparing it to the National Food Expenditure Series (Figure 1).

**Figure 1: Differences in State-Level and National Food Expenditures, 2022**



In this case, we can see that **about \$418 billion** is missing from the total U.S. value of state-level food spending when alcohol and food furnished and donated (i.e., food served at hospitals, prisons, assisted living facilities, and food banks/pantries) are not included. Consequently, to arrive at a total food spending value *and* values for each market channel for the six states and the region we need to derive values for alcohol and food furnished and donated from the national dataset. On the next page, we outline the steps we took to derive state-level market channel estimates based on New England’s percent of national food spending at home and away from home.

## Step-by-Step Process for Calculating Total and Local/Regional Food Spending

1. In order to calculate a state’s—or New England’s—percentage of total U.S. spending on food at home (FAH) or food away from home (FAFH), we need to divide each state’s total FAH and FAFH spending by total U.S. FAH and FAFH spending using the [USDA’s State food sales, without taxes and tips, for all purchasers dataset](#).
2. Next, calculate food and alcohol spending *at home* by market channel by multiplying each state’s percentage of U.S. FAH by each of the 11 categories detailed under the “Food At Home (FAH)” and “Alcohol At Home (AAH)” columns in the USDA dataset. This is illustrated with Grocery Stores below. Do the same for food and alcohol spending *away from home* using the 12 categories detailed under the “Food Away From Home (FAFH)” and “Alcohol Away from Home (AAFH)” columns in the USDA dataset. This is illustrated with Full-Service Restaurants below. Add all market channel estimates together to arrive at total state food spending. Add all six states together to arrive at total New England food spending.
3. Finally, estimate each state’s local food spending for each market channel by multiplying each channel’s estimated percentage (derived through market channel research, surveys, and other available data sources during each round of the local food count) by each of the market channel total estimates. Add all market channel estimates together to arrive at total state local food spending. Add all six states together to arrive at total New England local food spending.

### STEP 1: Calculate Region’s Percent of National Total

U.S. FOOD AT HOME \$1,186,517,103,000	÷	NH FOOD AT HOME \$6,788,863,698	=	NH FAH PERCENT OF US 0.57%
U.S. FOOD AWAY FROM HOME \$1,311,071,803,200	÷	NH FOOD AWAY FROM HOME \$6,233,649,164	=	NH FAFH PERCENT OF US 0.48%

### STEP 2: Calculate Total Regional Sales by Market Channel

EXAMPLE	U.S. GROCERY STORES \$554,285,625,000	X	NH PERCENT OF U.S. 0.57%	=	NH GROCERY STORE SPEND. \$3,171,441,481
	U.S. FULL-SERVICE RESTAURANTS \$369,496,125,000		NH PERCENT OF U.S. 0.48%		NH FULL-SERVICE REST. SPEND. \$1,756,813,933

### STEP 3: Calculate Percent Regional

EXAMPLE	NH GROCERY STORE SPENDING \$3,171,441,481	X	NH PERCENT LOCAL 6.3%	=	NH GROCERY STORE LOCAL SPENDING \$199,916,372
	NH FULL-SERVICE REST. SPEND. \$1,756,813,933		NH PERCENT LOCAL 3.0%		NH FULL-SERVICE REST. LOCAL SPENDING \$52,704,418





# Food Count Results

## Total and Local Food Spending Estimates by Market Channel

Food and alcohol spending in the United States totaled nearly \$2.5 trillion in 2022, with **New Hampshire accounting for \$13.0 billion, or 0.52%, of the national total.** Spending on food and alcohol for at home consumption totaled \$6.8 billion, or 52.1%, of the state total, with the remaining \$6.2 billion spent at restaurants and other venues away from home. Spending across just five channels—grocery stores, super-centers, food stores, and limited-service and full-service restaurants—accounted for more than two-thirds of total state food and alcohol sales. **Spending on regionally-sourced products was estimated at \$300 million for food and alcohol purchased for at home consumption and \$121 million for food and alcohol consumed away from home, or 3.2% of total food and alcohol spending in the state** (Figures 1 and 2).

Figure 2: Estimated Total and Local Food Spending in New Hampshire, 2022

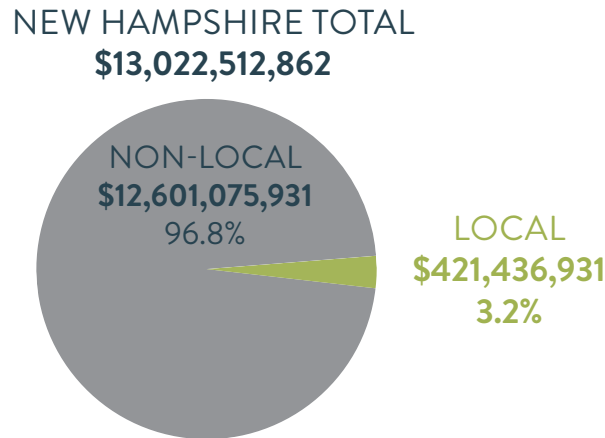
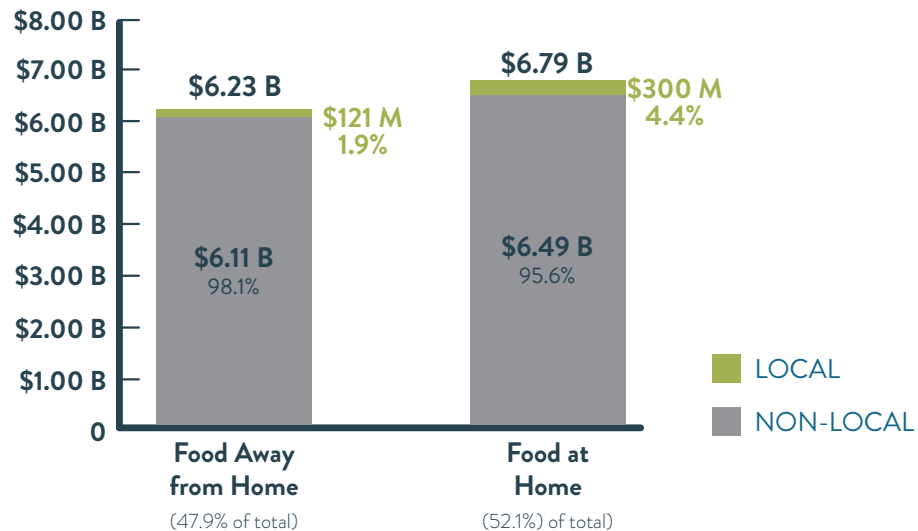
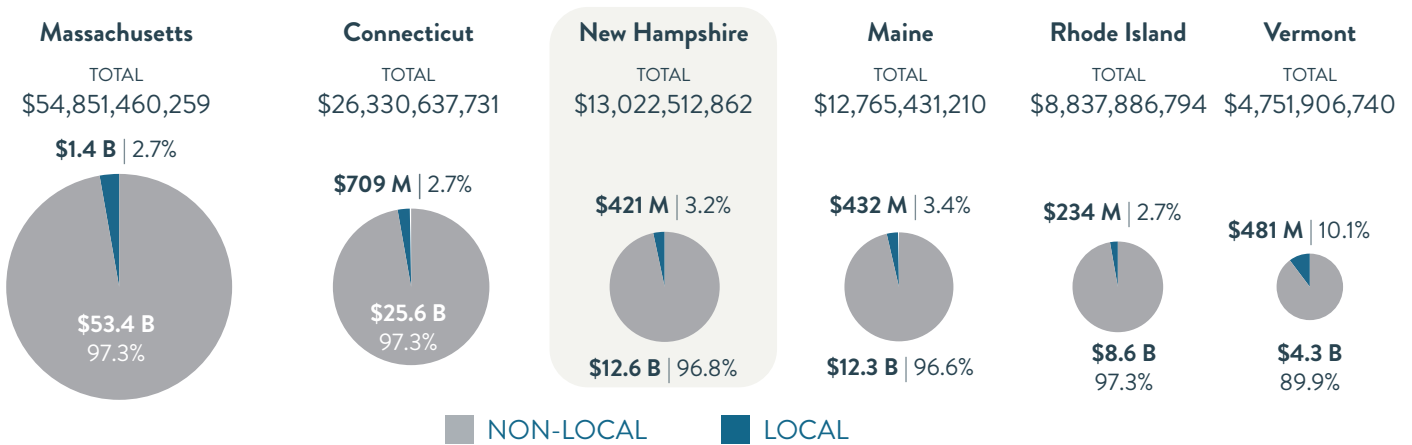


Figure 3: Estimated Total and Regional Food Spending in New Hampshire by Channel Type, 2022



**Figure 4: Estimated Total and Local Food Spending in New England by State, 2022**

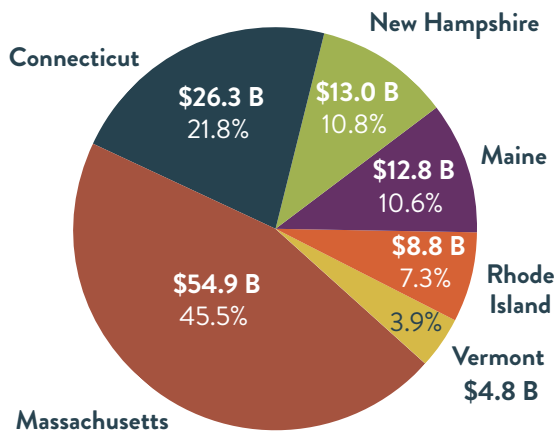
Within New England, Massachusetts accounted for the highest *total* (\$54.9 billion) and *local* (\$1.4 billion) food spending (Figure 4), while Vermont had the highest percentage of local food spending (10.1%).



**Figure 5: Estimated Total Food Spending in New England by State, 2022**

Massachusetts (45.5%) and Connecticut (21.8%) accounted for 67.3% of total food spending, while New Hampshire (10.8%), Maine (10.6%), Rhode Island (7.3%), and Vermont (3.9%) accounted for 32.7%.

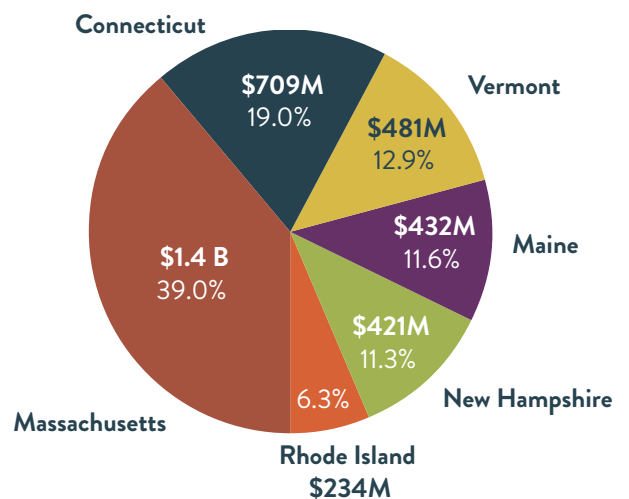
**Total Food Spending: \$120,559,835,595**



**Figure 6: Estimated Local Food Spending in New England by State, 2022**

We estimate that Massachusetts (39.0%) and Connecticut (19.0%) generated 58% of local food spending, followed by Vermont (12.9%), Maine (11.6%), New Hampshire (11.3%), and Rhode Island (6.3%).

**Local Food Spending: \$3,732,015,340**



**NOTE:** Vermont has been conducting Local Food Counts since 2011, with the most recent taking place in 2020. Vermont’s count has utilized the [Bureau of Labor Statistics’ Consumer Expenditure Series](#) as the denominator to estimate total food expenditures. This is because the USDA’s Food Expenditure Series, which we are now using, was not available prior 2023 at the state level. Utilizing the State Food Expenditure Series increases the estimate for total food purchases within Vermont, and therefore reduces the estimated percentage of local food purchasing in the state. In order to include Vermont’s data for our regional percentage, our Research team used the local food sales data from Vermont’s 2020, applied the total food expenditures from the USDA series for 2020 to recalculate the local percentage of the total, and then held that percentage constant and adjusted it to the 2022 USDA food expenditure data. As a result, the Vermont calculations and percentages for total and local food expenditures in this reporting reflect a 2022 estimate and do not match what is reflected in [Farm to Plate’s Data Dashboard](#) from 2020.

FOOD COUNT RESULTS

Table 4 and Figure 7 detail total and local spending estimates by market channel, along with the assumptions underlying each channel type. For example, spending on local products at grocery stores was estimated at \$155 million (4.9% of total grocery store spending). Spending via direct sales channels—farmers markets, CSAs, farm stands—was considered 100% local, as were home production (e.g., gardens) and donations. Spending on local products at full-service restaurants was estimated at \$52.7 million (3.0% of total full-service restaurant spending), while schools and colleges accounted for about \$18.1 million (6.9%). “Food furnished and donated,” which includes food served at hospitals, prisons, and assisted living facilities, accounted for \$11 million (3.9%).

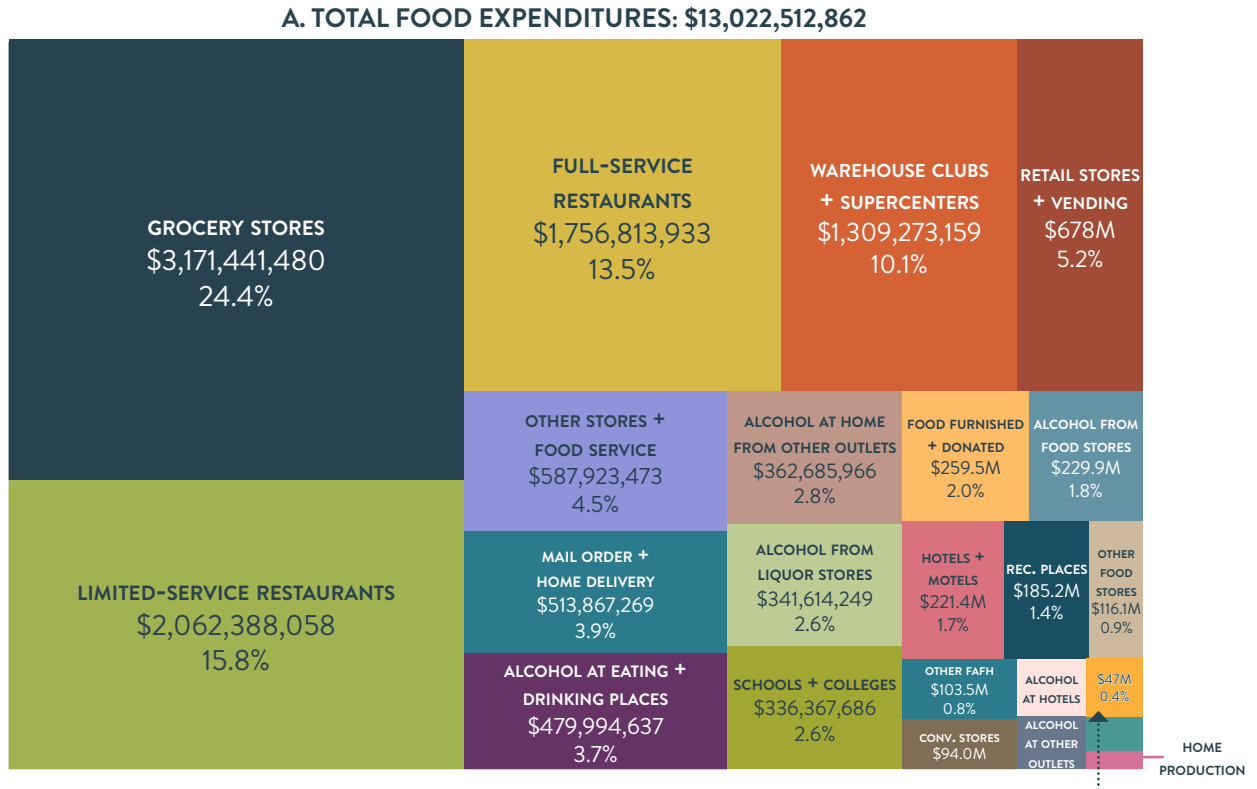
**Table 4: Estimated 2022 New Hampshire Food Expenditures by Market Channel**

Channel Type	State Total <sup>a</sup>	Percent Local	Local Estimate
<b>Total Food and Alcohol at Home (FAH)</b>	<b>\$6,788,863,698</b>	<b>4.4%</b>	<b>\$300,675,652</b>
Grocery stores	\$3,171,441,481	4.3% <sup>b</sup>	\$199,916,372
Warehouse clubs and supercenters	\$1,309,273,159	1.0% <sup>c</sup>	\$13,092,732
Other stores and foodservice <sup>d</sup>	\$587,923,473	1.0% <sup>c</sup>	\$5,879,235
Mail order and home delivery	\$513,867,270	1.0% <sup>c</sup>	\$5,138,673
Other food stores <sup>e</sup>	\$116,161,531	3.0% <sup>f</sup>	\$3,484,846
Convenience stores	\$93,013,684	1.0% <sup>c</sup>	\$930,137
Direct selling by farmers, manufacturers, wholesalers	\$47,459,154	100.0% <sup>g</sup>	\$47,459,154
Home production and donations	\$15,431,580	100.0% <sup>g</sup>	\$15,431,580
Alcohol at home from other outlets	\$362,685,966	1.0% <sup>h</sup>	\$3,626,860
Alcohol from liquor stores	\$341,614,249	1.0% <sup>h</sup>	\$3,416,142
Alcohol from food stores	\$229,992,151	1.0% <sup>h</sup>	\$2,299,922
<b>Total Food and Alcohol Away from Home (FAFH)</b>	<b>\$6,233,649,164</b>	<b>1.9%</b>	<b>\$120,761,279</b>
Limited-service restaurants <sup>i</sup>	\$2,062,388,058	1.0% <sup>c</sup>	\$20,623,881
Full-service restaurants <sup>j</sup>	\$1,756,813,933	3.0% <sup>f</sup>	\$52,704,418
Retail stores and vending	\$678,364,694	1.0% <sup>c</sup>	\$6,783,647
Schools and colleges	\$336,367,686	6.9% <sup>k</sup>	\$18,150,335
Food furnished and donated <sup>l</sup>	\$259,501,664	3.9% <sup>m</sup>	\$11,096,867
Hotels and motels	\$221,359,484	1.0% <sup>c</sup>	\$2,213,595
Recreational places	\$185,254,380	1.0% <sup>c</sup>	\$1,852,544
Other FAFH sales, NEC <sup>n</sup>	\$103,560,338	1.0% <sup>c</sup>	\$1,035,603
Drinking places	\$28,529,129	1.0% <sup>c</sup>	\$285,291
Alcohol at eating and drinking places	\$479,994,637	1.0% <sup>h</sup>	\$4,799,946
Alcohol at hotels and motels	\$62,908,907	1.0% <sup>h</sup>	\$629,089
Alcohol away from home from other outlets	\$58,606,254	1.0% <sup>h</sup>	\$586,063
<b>TOTAL<sup>o</sup></b>	<b>\$13,022,512,862</b>	<b>3.2%</b>	<b>\$421,436,931</b>

a US estimate multiplied by 0.57% for FAH and 0.48% for FAFH.  
b Weighted average by number of retail locations of survey response percentages, additional research by the LFC team, and a 4.5% plug figure based on survey responses from representative grocery stores for all unresponsive locations.  
c Estimate based on possible presence of national products manufactured by regional companies and/or local dairy products.  
d Includes department, drug, sporting goods, electronics, and liquor stores.  
e Includes specialty food stores, such as butchers, seafood, and cheese shops.  
f Estimate based on possible presence of locally raised/produced products.  
g Estimated at 100% to align with definition of category.  
h Estimate based on possible presence of regional craft beverages.  
i Includes venues that typically specialize in a particular foods and where customers order and pay at a counter before receiving their food.  
j Includes venues that typically offer table service and range from casual to fine-dining establishments.  
k Weighted average by enrollment of survey responses with a 5% plug figure for unresponsive locations to reflect possible presence of fluid milk and some regional produce.  
l Includes prisons, jails, hospitals, assisted living facilities, and residential programs.  
m Weighted average by bed capacity of survey responses with a 5% plug figure for unresponsive locations to reflect possible presence of fluid milk and some regional produce.  
n Includes all channels “not elsewhere classified.”  
o May not equal sum of rows exactly due to rounding errors.

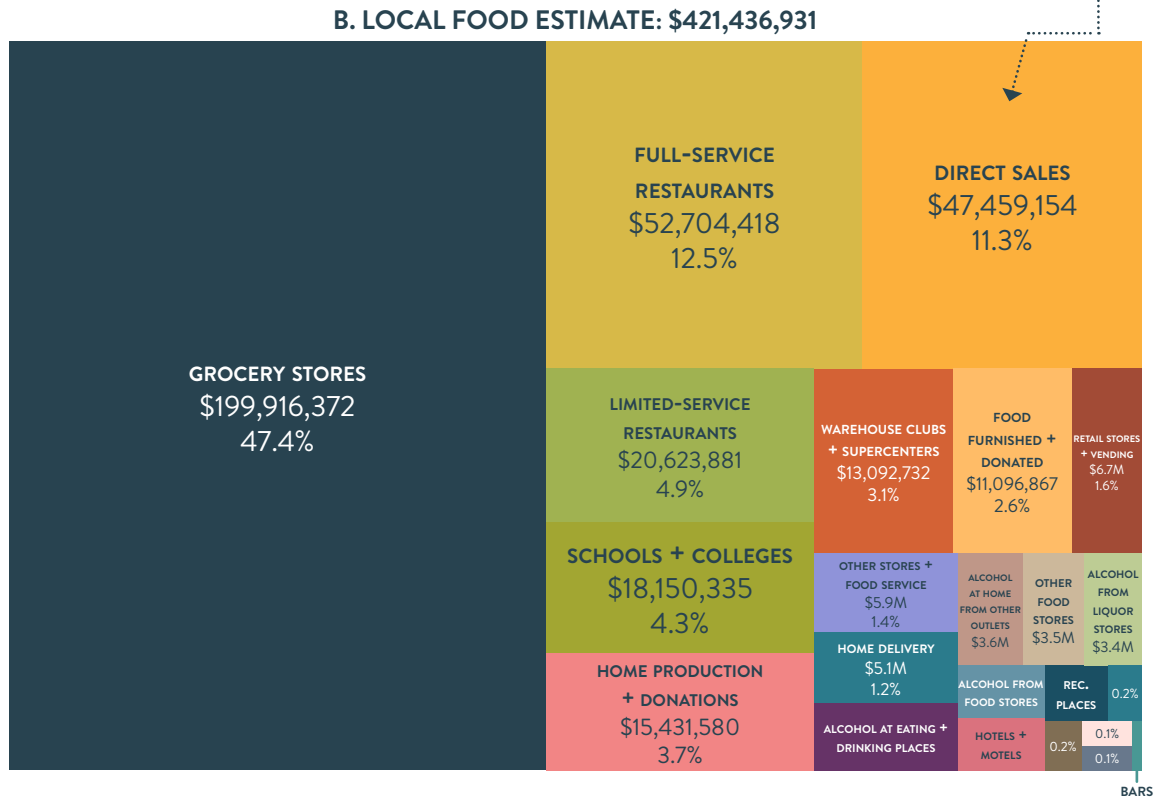
**Figure 7: Total New Hampshire Food Expenditures and Local Estimate by Market Channel**

A. The majority of all food purchases take place at grocery stores, restaurants, and warehouse clubs/supercenters.



B. The majority of estimated local food purchases take place at grocery stores, full-service restaurants, via direct sales from farmer to consumer, and at schools and colleges.

Direct sales made up 0.4% of total sales, and 11.3% of local food sales.





# Discussion

This inaugural regional food count illustrates the difficulties of attempting to gather comprehensive purchasing data from a representative sample through a “bottom up” approach. Despite robust outreach and follow-up efforts from state research associates, survey response rates were low, non-representative for the largest food-sourcing sectors, and respondents often provided questionable data or cursory estimates. This process highlights the inherent difficulty of engaging with private business entities and generating the trust necessary for them to share their proprietary sales and purchasing data.

Despite these limitations, the reliable USDA food spending data used to estimate state-level food expenditures by outlet type clearly shows the outsized impact that grocery stores and restaurants will have on conducting accurate counts in the subsequent years of this initiative. For example, New Hampshire has [nearly 250 grocery and superstores](#), where a majority of residents source the vast majority of their food for home consumption. About 40% of those stores are part of a grocery chain comprised of less than 10 stores or are unaffiliated stand-alone entities (Figure 8). **It may be more possible to 1) collect data from smaller stores, and 2) connect these independent stores to local and regional farmers, fishers, aquaculturists, food and beverage manufacturers, and partner organizations.** Compiling accurate lists of these entities and conducting targeted outreach to their appropriate contacts to educate them about the local food count and to encourage increased sourcing and tracking of regionally-produced foods will be critical to achieving New England’s shared goal of achieving 30% regional food sourcing by 2030.

**Figure 8: Number of Major Grocery Store Chains and Small Stores in New Hampshire**



**Available Information on Local Food Product Spending:** While we were not able to gather product data in this round, we have data from [Vermont’s Local Food Count](#) that indicates that dairy products, processed food, beverages, meat, vegetables, baked goods, fruits, eggs, and maple syrup were the top local products sold. We also have data from the [2019 Farm to School Census](#), which identifies the top 20 local items purchased by responding institutions in New Hampshire (Table 5). These two data sources are suggestive of the types of food products that are likely to be more widely available in New Hampshire and the region.

**Table 5: Top 20 Local Items Purchased in NH School Nutrition Programs by Reported Spending Level**

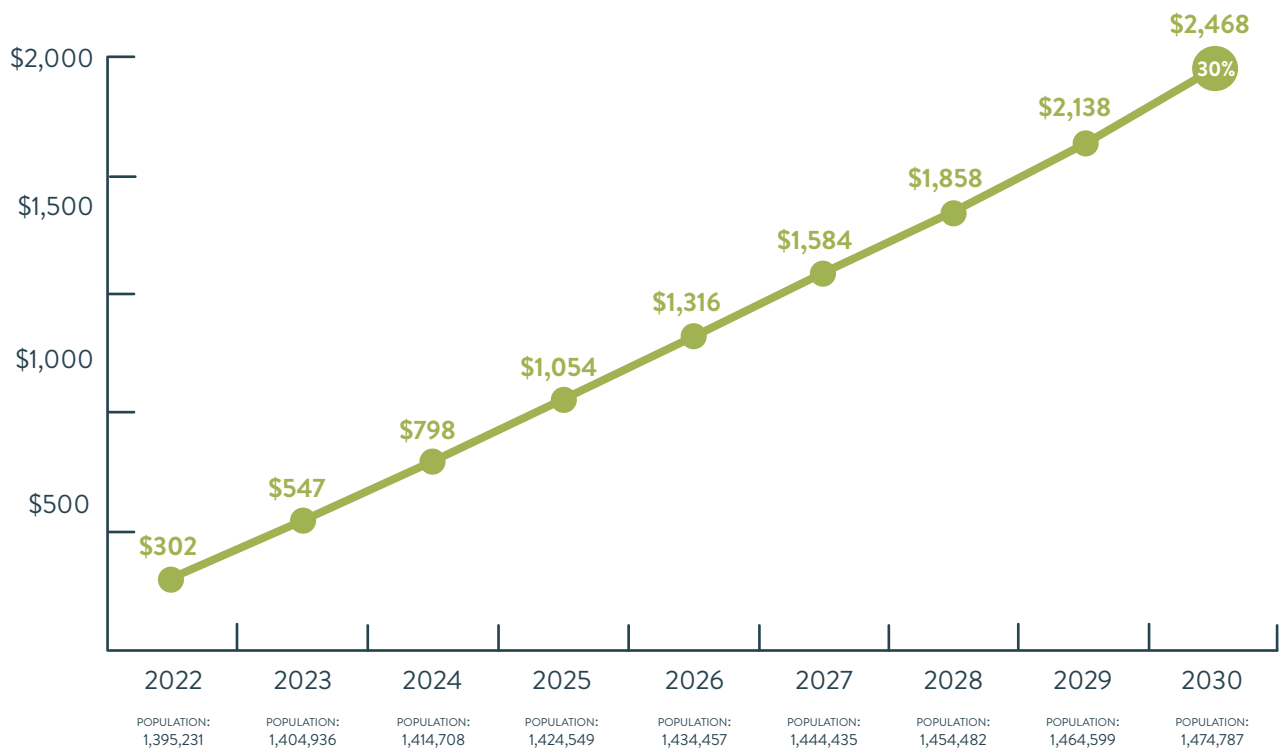
Items	%	Items	%	Items	%	Items	%
Apples	81%	Cucumbers	19%	Broccoli	12%	Kale	4%
Carrots	35%	Potatoes	15%	Salad Mix	12%	Peaches	4%
Lettuce	31%	Squash	15%	Corn	8%	Strawberries	4%
Other	23%	Tomatoes	15%	Bell Peppers	4%	Pears	-
Fluid Milk	19%	Beef	12%	Blueberries	4%	Zucchini	-

**Exploring 30% Local Food Per Capita Spending in 2030:** One additional discussion point to consider is what per capita local food spending levels might look like in 2030. As a practical matter, we know from the U.S. Bureau of Labor [Statistics Consumer Expenditure Survey](#) that **White, Asian, Hispanic, and Black households all spend roughly 12% of household incomes on food.** However, even though food expenditures are essentially *proportionally the same* for all demographics, it is also the case that Black, Hispanic, and other people of color have *less* money to spend than White and Asian Americans. We also know from the Consumer Expenditure Survey that ultraprocessed foods (e.g., prepared meals, canned foods, chips, crackers, pastas, etc.) are the top food expenditure category for all Americans.

While proportional spending levels will be roughly the same, we can expect significant differences in *total* local food purchases by race/ethnicity, income level, education level, age, and other variables due to differences in income and access. Unfortunately we do not currently have enough information to model these variations in local food spending. Using *per capita* spending estimates, we can arrive at hypothetical spending values and assume that some people will spend considerably more, and some will spend considerably less.

We estimate that 3.2% (\$421 million) of food spending in New Hampshire went to local/regional food products in 2022. This is equal to \$302 per capita. What might it take to achieve spending 30% of food purchases on local/regional food products by 2030? Using the USDA State Food Expenditure Series data for New Hampshire, we apply the compound annual growth rates for food expenditures (1.8%) and population (0.7%) from 1997 to 2022 out to 2030 to estimate what 30% of per capita food spending on local/regional food could look like. The key takeaway is that per capita local spending would have to grow from a couple hundred dollars to thousands of dollars: By 2030, total per capita food expenditures would grow to \$8,225 (from \$7,514 in 2022). New Hampshire residents could then choose to spend \$2,468 on a per capita basis to reach the stretch 30% goal.

**Figure 9: Getting to 2030 – Hypothetical Changes in Per Capita Local Food Spending**



**Note:** USDA State Food Expenditure Series data was updated after *Volume 4* and the *New Hampshire State Brief* were published. This explains why the values shared here deviate from previously published analyses (i.e., the difference between \$2,468 here and \$1,734 in the *New Hampshire State Brief* reflect updates to the underlying data).



# Call to Action

It is clear that sustained and collaborative action, along with a significant and coordinated investment of resources, will be required to meet a goal of 30% consumption of regional food products by 2030. Many difficult questions remain:

- » Since most people get their food from grocery stores and restaurants, how do we get more local and regionally produced food into these market channels?
- » What strategies can support local foods being added or increased into discount stores product inventories?
- » What interventions can shift power over food choices back to communities?
- » How do we maintain and expand important gains made in institutional market channels (schools, colleges, and hospitals) as advocacy expands to other market channels?
- » What models of food retail could bring more local and regional foods to low income/low access communities?
- » How do we market and position local and regional foods to be competitive against lower cost options from farther afield?
- » How do we build the capacity to consistently track and report local and regional purchases, including capturing local and regional ingredients incorporated into value-added products?

**Every New Hampshire has a role to play to transition toward a more just, sustainable, and resilient food system.**

## Grocery Stores

- » Promote local and regional foods through labeling, merchandizing, and sampling.
- » Explore what consumers want to see for regional products: open up shelves, coolers, and freezer spaces to more regional food producers.
- » Track food sourcing by state to improve reporting.

## Restaurants

- » Promote local and regional foods by connecting producers with chefs and restaurant owners.

## Nonprofit Organizations and Partnerships

- » Advocate for support services, investments, and policies that build local/regional supply chains.
- » Support and expand regional market stability (e.g., [Northeast Organic Family Farm Partnership](#) is working to increase demand for organic dairy products).

## Food Service Management Companies

- » Continue to build out supply chains between local/regional producers and New England institutions (e.g., [New Hampshire Farm to School](#)).

## Funders

- » Support the needs of food system development partners seeking to bolster regional supply chains and increase market presence for New Hampshire foods.

## State Agriculture Departments

- » Support existing, new, and underserved and under-represented farms, fishers, and food businesses.
- » Engage with food producers and industry associations to map out challenges and opportunities for scaling up.

## Legislators (State & U.S. Congressional)

- » Create policies that help food system businesses to thrive.
- » Encourage livable wages in food system occupations.

## Economic and Community Development Planners

- » Prioritize financing for and locating of independently owned grocery stores of all types in urban centers and rural communities.

## Consumers

- » When possible, buy foods that are grown, produced, harvested or raised in [New Hampshire](#) and New England.

**Spending \$10 a week on local or regional food goes a long way: By choosing local and regional food over products from far away, you are helping New England build a more equitable and resilient food system.**

For additional analyses of market channels and New Hampshire, visit:

