

VERMONT

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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— DATA UPDATE —

The updated local sales figures were estimated from product sales patterns observed across chain retailers in a large dataset compiled by **NielsenIQ**. This dataset was comprised of point-of-sale scanner data collected directly from over 30 participating grocery, convenience, and superstore retail chains operating across New England for the 2022 calendar year. USDA data for 2022 was also revised after publication. A detailed methodology of the local food count is published on the [NEFNE website](#).

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 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 between seven state-level food system organizations, and six-state agricultural, economic and environmental department representatives—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) was not available in 2022, but will be in the 2025 Local Food Count. 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 Does Local Food Matter?

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, fishmen, 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.**

Inequity in Food Spending in Vermont

Everyone in Vermont—regardless of income, race, ethnicity, gender, location, citizenship status, language spoken, or physical ability—should be able to enjoy healthy, 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 Essex County, to urban neighborhoods in Burlington, 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 Vermonters 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.

How Are We Counting Local Food?

Is it Local to New England?

It's Local, when:

(when two or more of these requirements are met)

It's a **RAW AGRICULTURAL PRODUCT** (for example, milk, meat, eggs, vegetables, and maple syrup) that is grown, raised, landed, harvested, or tapped in New England

The **majority of ingredients** (>50% by volume, excluding water) of raw agricultural products are local to New England

It's **processed or manufactured** in New England

The food manufacturer is **headquartered** in New England

 MEAT + MEAT PRODUCTS	 SEAFOOD + SEAFOOD 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.	Any fish, shellfish, sea vegetable, and processed product composed of greater than 50% of the same (e.g., clam chowder, fresh haddock, tinned oysters, frozen scallops).
 FRESH FRUITS + VEGETABLES	 EGGS + EGG PRODUCTS
Raw and unprocessed fruits or vegetables. Processed fruits and vegetables (canned, frozen, dried or powdered).	Shell eggs or 100% egg products (e.g. bulk liquid eggs, frozen egg patties, etc.) derived from poultry birds only.
 DAIRY PRODUCTS	 GRAIN PRODUCTS + BAKED GOODS
Any milk, cheese, cream, butter, ice cream, or yogurt product derived from the milk of cows, goats, sheep, or other animals .	Grains and processed grain-based products including breads, rolls, tortillas, flours, cakes, cookies, or other baked goods.
 ALCOHOLIC BEVERAGES	 NON-ALCOHOLIC BEVERAGES
Alcoholic beverages include beer, wine, spirits, or beverages with an alcohol content greater than 0.5% alcohol by volume.	Non-alcoholic beverages include any beverages—excluding bottled water—with an alcohol content of less than or equal to 0.5% alcohol by volume (e.g., soda, seltzer, energy drinks).
 SWEETENERS	 ALL OTHER FOOD PRODUCTS
Sugar, molasses, corn syrup, honey, maple syrup/sugar, and other sweeteners.	Foods including nuts and nut butters, chocolate, confections, coffee and tea products, or any other food item, excluding water , not specifically included in any of the previous categories.

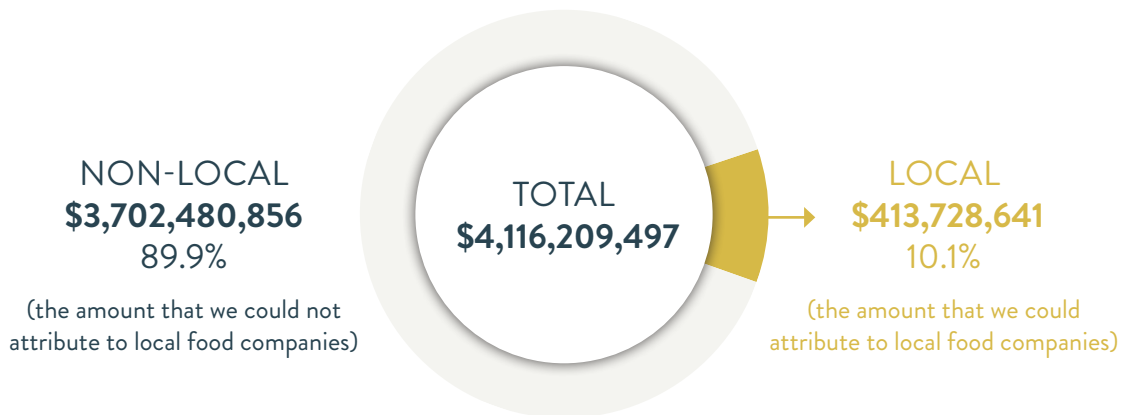


Food Count Results

Total and Local Food Spending Estimates by Market Channel

Food and alcohol spending in New England totaled about \$110.4 billion in 2022, with Vermont accounting for about \$4.1 billion, or 3.6%, of the regional total. **Spending on locally-sourced products was estimated at over \$414 million, or 10.1% of total Vermont food spending** (Figure 1), and 8.1% of New England local food spending. See methodological note on page 4 for more details about Vermont estimates.

Figure 1: Revised Local Food Spending in Vermont, 2022



NOTE: Nominal dollars (i.e., 2022 dollars) are shown throughout this Brief.

Spending on food and alcohol for at home consumption totaled about \$2.5 billion, or 59.7%, of the state total, with the remaining \$1.7 billion spent at restaurants and other venues away from home. About \$290 million was spent on locally/regionally sourced food and alcohol for at home consumption, while about \$124 million was spent on locally/regionally food and alcohol consumed away from home (Figure 2).

Figure 2: Revised Local Food Spending in Vermont by Market Channel, 2022

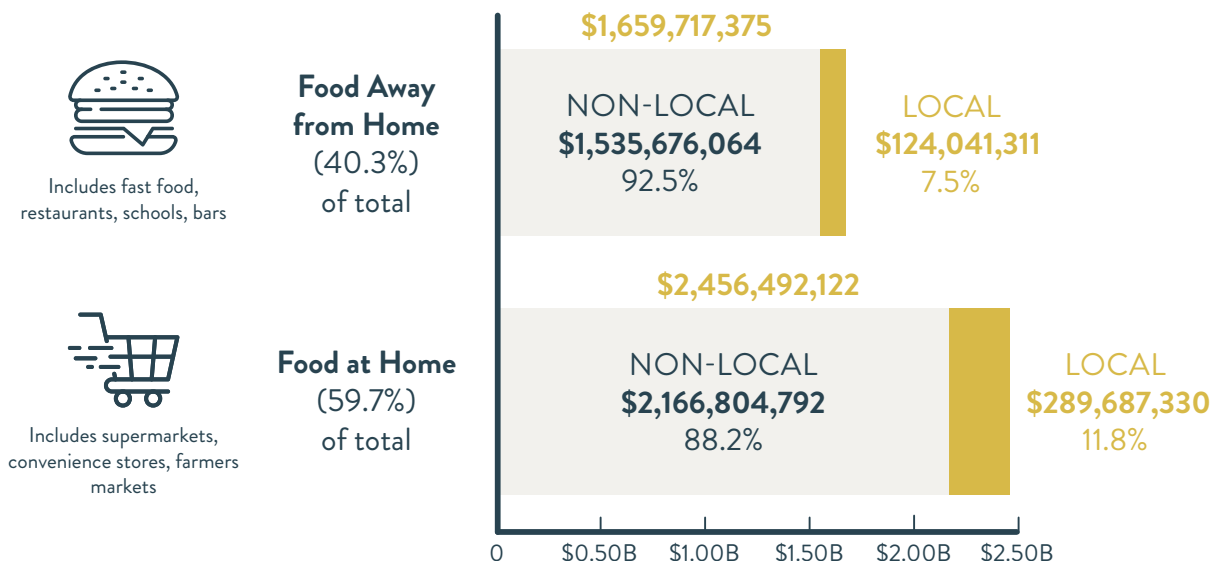
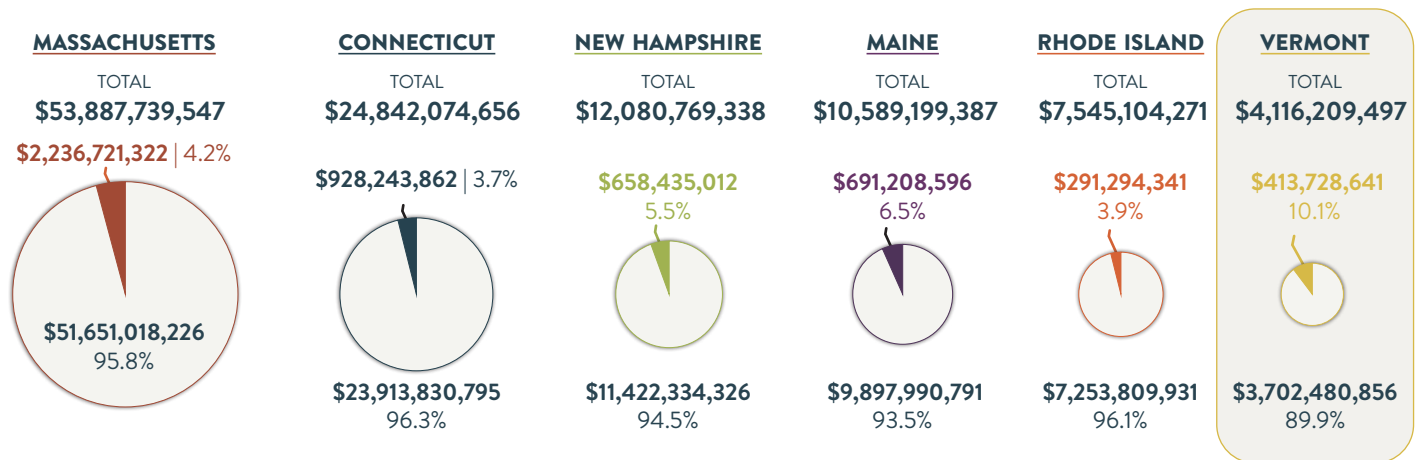
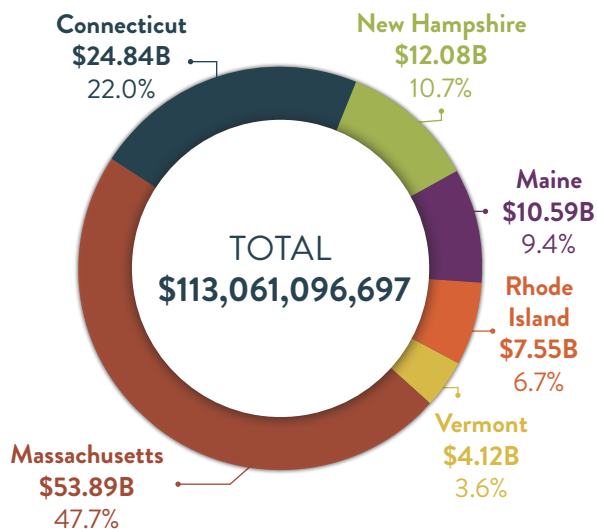


Figure 3: Revised Total and Local Food Spending in New England by State, 2022

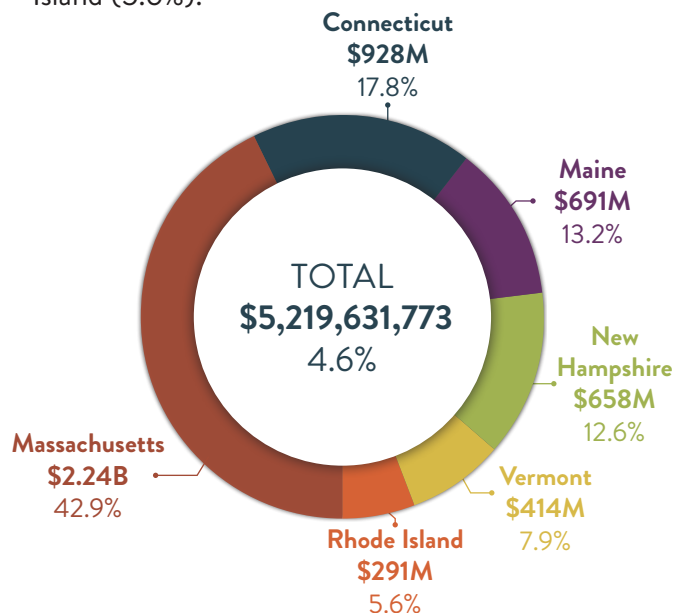
Within New England, Massachusetts accounted for the highest *total* (\$53.9 billion) and *local* (\$2.2 billion) food spending (Figure 3), while Vermont had the highest percentage (10.1%) of local spending.

**Figure 4: Revised Total Food Spending in New England by State, 2022**

Massachusetts (47.7%) and Connecticut (22.1%) accounted for 69.7% of total food spending, while New Hampshire (10.7%), Maine (9.4%), Rhode Island (6.7%), and Vermont (3.6%) accounted for 30.3%.

**Figure 5: Revised Local Food Spending in New England by State, 2022**

We estimate that Massachusetts (42.9%) and Connecticut (17.8%) generated 60.7% of local food spending, followed by Maine (13.2%), New Hampshire (12.6%), Vermont (7.9%) and Rhode Island (5.6%).



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 to 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.

Spending across just five channels—grocery stores, supercenters, other stores (e.g., CVS), and limited-service and full-service restaurants—accounted for nearly 71.3% of total state food and alcohol sales. Spending on local products at grocery stores was estimated at \$155.2 million (10.5% 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.

Table 1: Revised 2022 Vermont Food Expenditures by Channel

Channel Type	State Total ^a	Percent Local	Local Estimate
Total Food and Alcohol at Home (FAH)	\$2,456,492,122	11.8%	\$285,966,190
Grocery stores	\$1,474,040,565	10.5% ^b	\$289,687,330
Warehouse clubs and supercenters	\$243,239,445	0.9% ^c	\$155,195,450
Other stores and foodservice ^d	\$115,750,190	8.0% ^c	\$2,161,879
Other food stores ^e	\$103,818,803	20.0% ^f	\$9,260,015
Convenience stores	\$179,765,192	2.3% ^c	\$20,763,761
Direct selling by farmers, manufacturers, wholesalers	\$42,979,000	100.0% ^g	\$4,134,599
Home production and donations	\$6,356,263	100.0% ^g	\$42,979,000
Alcohol from liquor stores	\$132,767,136	10.1% ^h	\$6,356,263
Alcohol from food stores	\$85,310,144	20.3% ^h	\$13,402,057
Alcohol at home from other outlets	\$72,465,385	25.0% ^h	\$17,317,959
Total Food and Alcohol Away from Home (FAFH)	\$1,659,717,375	7.5%	\$18,116,346
Limited-service restaurants ⁱ	\$574,207,417	3.3% ^c	\$18,948,845
Full-service restaurants ⁱ	\$529,216,940	6.0% ^f	\$31,753,016
Retail stores and vending	\$79,609,700	6.0% ^c	\$4,786,682
Schools and colleges	\$52,289,167	20.8% ^k	\$10,876,147
Food furnished and donated ^l	\$38,510,473	13.5% ^m	\$5,198,914
Hotels and motels	\$114,245,634	13.1% ^c	\$14,944,942
Recreational places	\$27,651,587	2.5% ^c	\$691,290
Other FAFH sales, NEC ⁿ	\$36,801,392	2.5% ^c	\$920,035
Drinking places	\$10,539,720	17.3% ^c	\$1,828,467
Alcohol at eating and drinking places	\$140,690,556	20.0% ^h	\$28,138,111
Alcohol at hotels and motels	\$33,859,557	10.4% ^h	\$3,528,881
Alcohol away from home from other outlets	\$22,095,231	11.0% ^h	\$2,425,982
TOTAL^o	\$4,116,209,497	10.1%	\$413,728,641

^a US total multiplied by 0.18% for FAH and 0.17% for FAFH.

^b Weighted average by number of 10.9% based on NielsenIQ data.

^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.

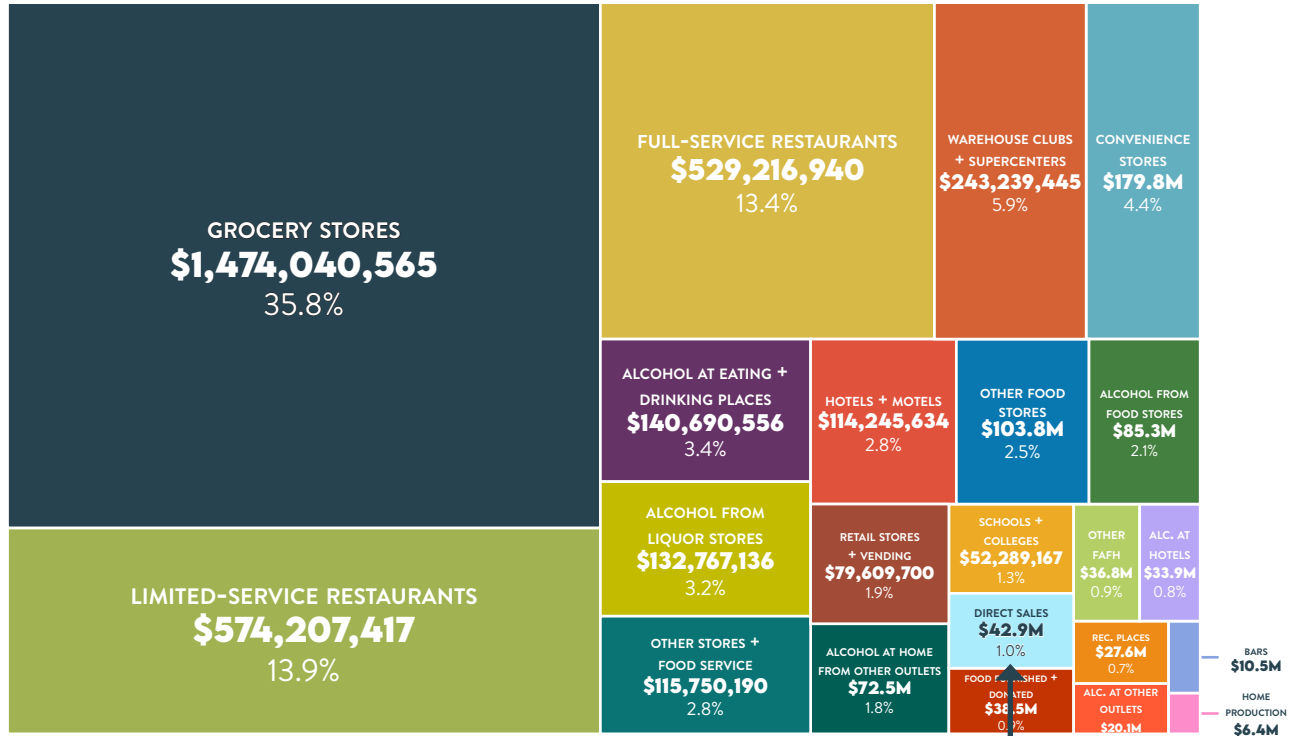
^m Weighted average by bed capacity of survey responses with a 5% plug figure for unresponsive locations to reflect possible presence of fluid milk and some regional produce.

ⁿ Includes all channels "not elsewhere classified."

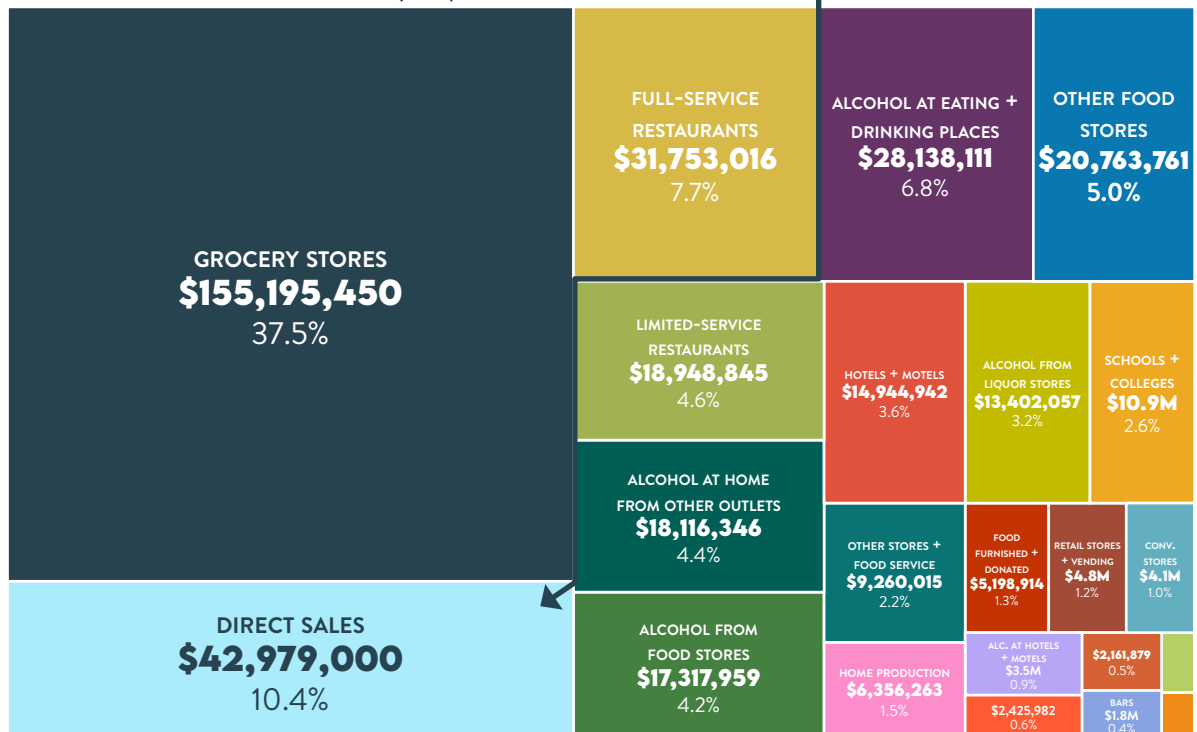
^o May not equal sum of rows exactly due to rounding errors.

Figure 6: Revised Vermont Food Expenditures by Market Channel

A. The majority of all food purchases in Vermont occur at grocery stores, restaurants, and warehouse clubs/supercenters.

A. TOTAL FOOD EXPENDITURES: \$4,116,209,497

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

B. LOCAL FOOD ESTIMATE: \$413,728,641

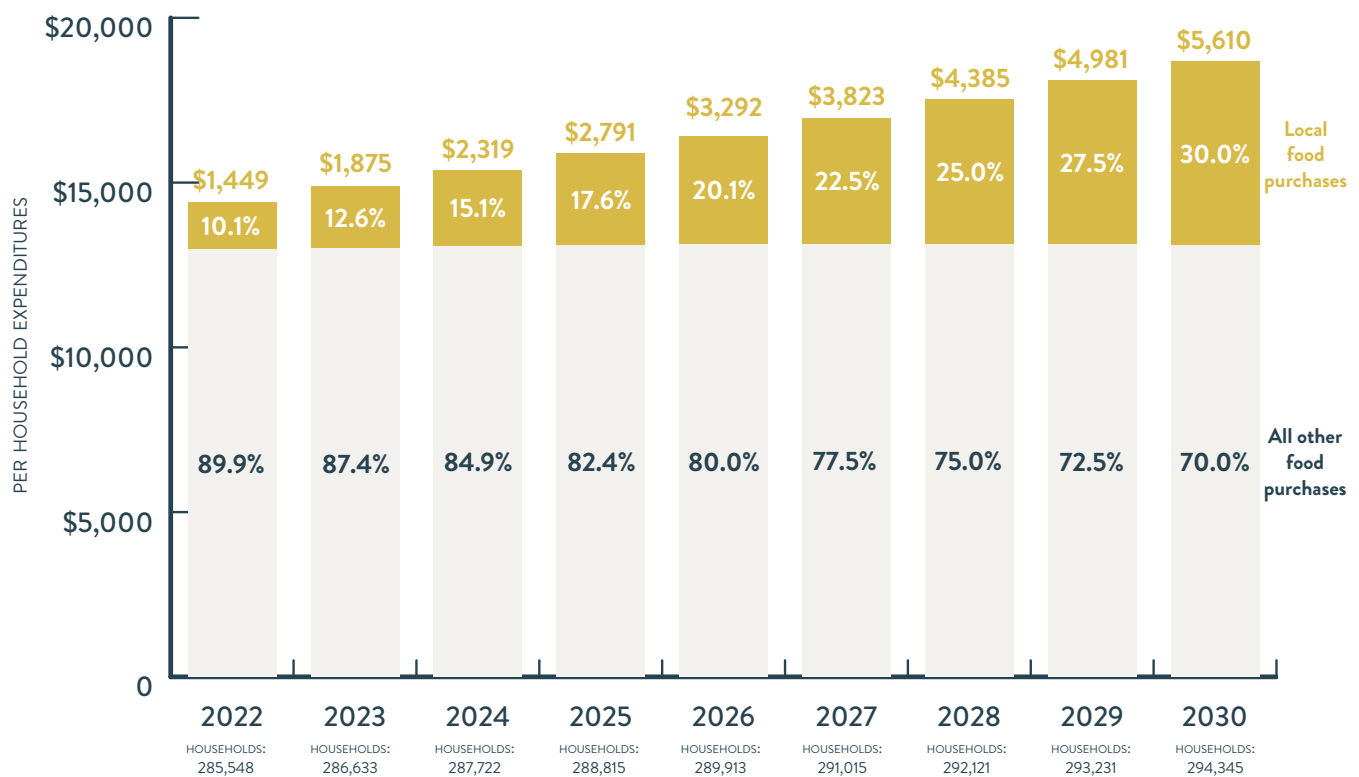
Exploring 30% Local Food Per Household Spending in 2030

One point to consider is what per capita local food spending levels might look like in 2030. 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 income 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) 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 household* 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 estimated that 10.1% (\$413.7 million) of food spending in Vermont went to local food products in 2022. This is equal to about \$1,449 per household (assuming 2.3 people per household). What might it take to achieve spending 30% of food purchases on local food products by 2030? Using the USDA State Food Expenditure Series data for Vermont, we apply the compound annual growth rates for food expenditures (3.7%) and population (0.4%) from 1997 to 2022 out to 2030 to estimate what 30% of per household food spending on local food could look like. The key insight is that per household local spending would have to grow from about \$1,450 to over \$5,600: By 2030, total per capita food expenditures would grow to \$18,701 (from \$14,415 in 2022). Households in Vermont could then explore spending about \$5,600 on local food per year to reach the stretch 30% goal (Figure 7).

Figure 7: Getting to 2030 — Linear Changes in Per Household Local Food Spending





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 outside the region?
- » 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 Rhode Islander 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

Funders

- » Support the needs of food system development partners seeking to bolster regional supply chains and increase market presence for Vermont 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 small and midsize local and regional 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 Vermont 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 Rhode Island, visit:

