FARM to INSTITUTION NEW ENGLAND

December 6th, 2018| Leominster, STATE
Mass Farm and Sea to School Conference

FARM TO INSTITUTION NEW ENGLAND

MOBILIZING THE POWER OF NEW ENGLAND INSTITUTIONS TO TRANSFORM THE REGIONAL FOOD SYSTEM


Photo courtesy of Intervale Food Hub

OUTLINE

I. ABOUT US
II. ABOUT OUR RESEARCH
III. METRICS IMPACT

ABOUT US

OUR MISSION

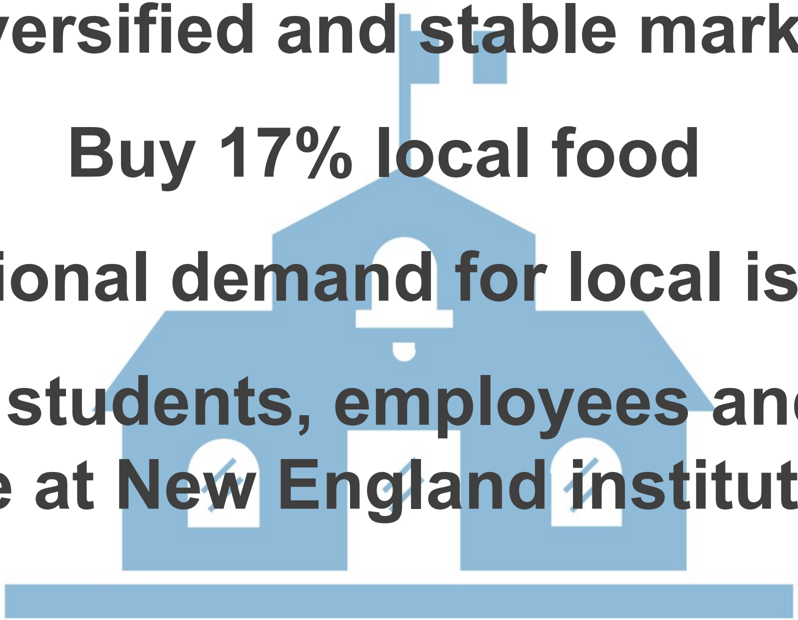
To mobilize the power of New England institutions to transform our food system

OUR HISTORY

Founded in 2011 as a partnership among regional farm to school leaders and the six New England agricultural commissioners

Photo: Hampshire College

WHY INSTITUTIONS?



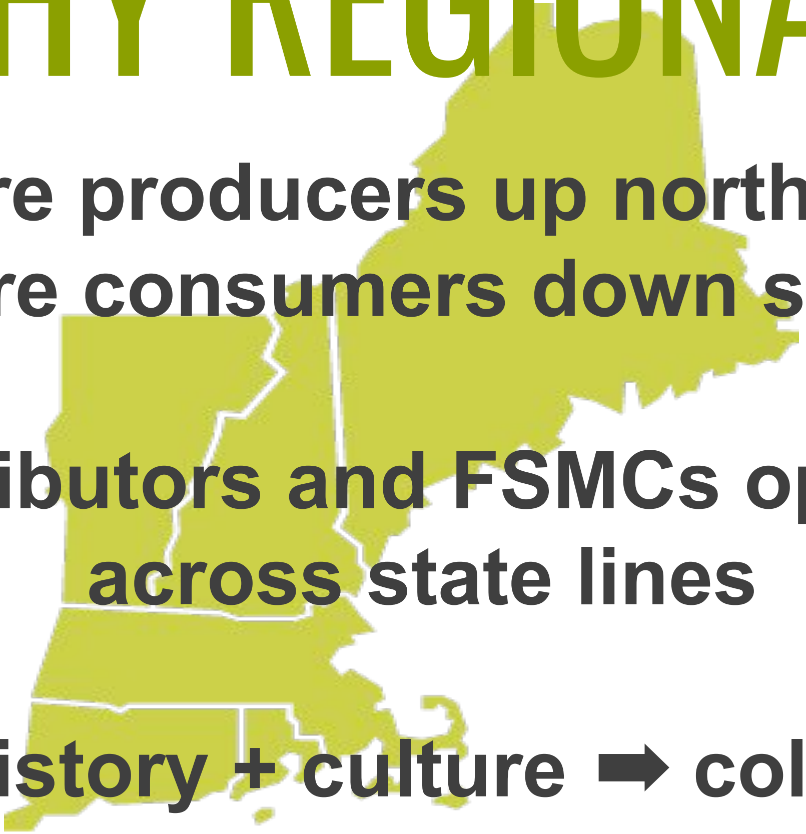
Diversified and stable market

Buy 17% local food

Institutional demand for local is rising

3.7 million students, employees and patients spend time at New England institutions daily

WHY REGIONAL?



More producers up north and more consumers down south

Distributors and FSMCs operate across state lines

Shared history + culture ➡ collaboration

WIDE-REACHING IMPACT

In New England, there are:

4,628	210	256	34,877
Schools	Colleges	Hospitals	Farms

WHAT FINE OFFERS

NETWORK SERVICES	PROGRAMS	COMMUNITIES OF PRACTICE
EVENTS & TRAININGS	FARM & SEA TO CAMPUS	LOCAL FOOD PROCESSORS & HUBS
COMMUNICATIONS	FOOD SERVICE	METRICS COLLABORATIVE
RESEARCH & METRICS	PUBLIC POLICY	DINING OPERATORS

ABOUT OUR RESEARCH

WHY METRICS?

To understand the system we are trying to change, track our progress, and inform our plans

DATA SOURCES

2015 FINE College Dining Survey

(N=105/209; 50% response rate)

2015 FINE Food Distributor Survey

(N=56/86; 65% response rate)

2015 USDA Farm to School Census

(N=727/1015 New England school districts; 72% response rate)

2016 & 2017 Health Care Without Harm Survey

(N=84/150; 56% response rate) (N=54/150; 36% response rate)

2016 FINE Producer Survey

225+ responses across six states

All data presented comes from surveys, is self-reported and may conflict with other data sources.

K-12 SCHOOL DATA

K-12 SCHOOL HIGHLIGHTS

$25 MILLION
SPENT ON LOCAL FOOD BY SCHOOLS IN THE 2013–14 SCHOOL YEAR

MORE THAN 1.1 MILLION
STUDENTS HAVE ACCESS TO FARM TO SCHOOL ACTIVITIES

16%
OF ANNUAL FOOD BUDGET SPENT ON LOCAL FOOD (INCLUDING MILK), ON AVERAGE

70%
OF SCHOOL DISTRICTS PLAN TO BUY MORE LOCAL FOOD

TOP FIVE FOOD PRODUCTS PURCHASED LOCALLY BY NEW ENGLAND K-12 SCHOOLS

Percent of responding K-12 schools listing each local product in their top five purchases

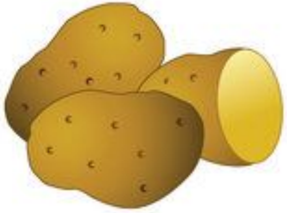
91%

Apples

29%

Tomatoes

29%



Potatoes

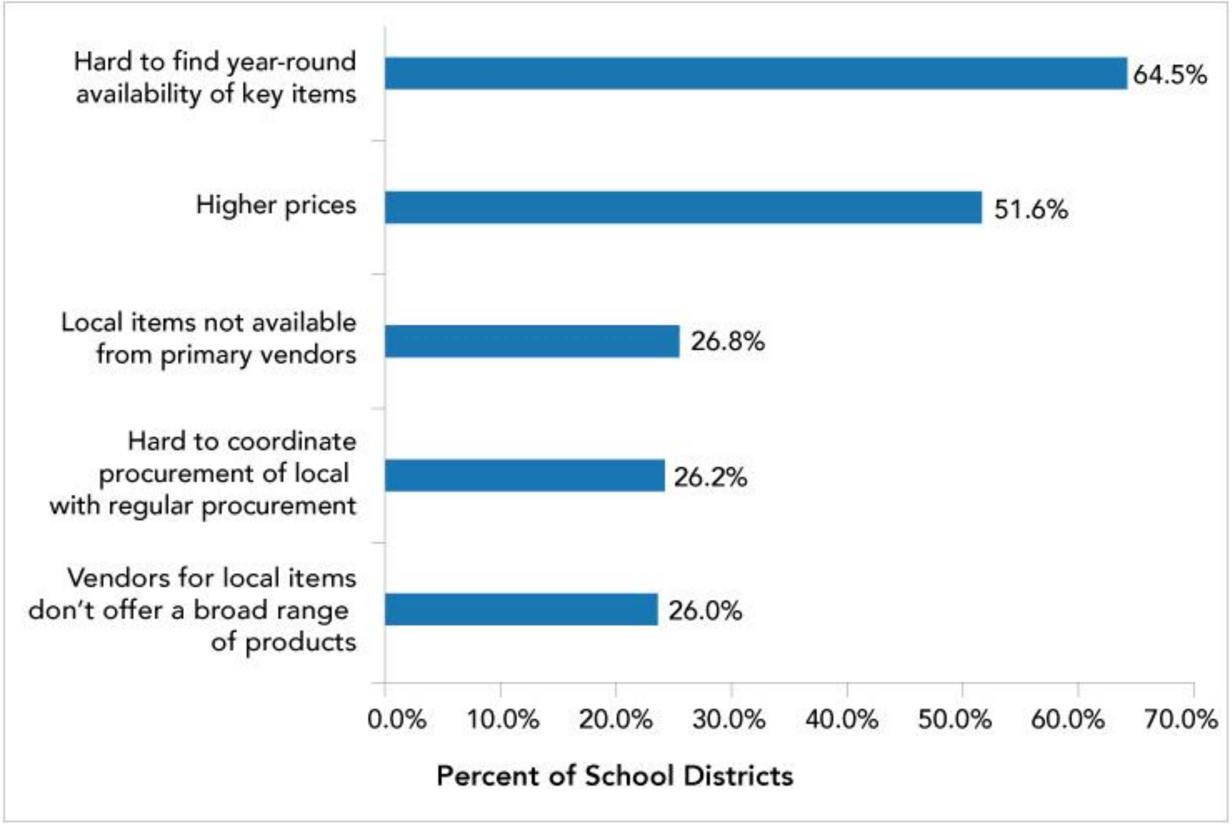
28%

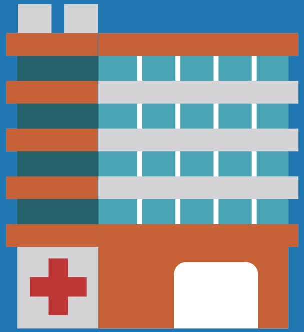
Lettuce / Salad Mix

25%

Squash

TOP BARRIERS TO GETTING LOCAL FOOD TO K-12 SCHOOLS IN NEW ENGLAND





HOSPITAL DATA

HOSPITAL HIGHLIGHTS

$42 MILLION

SPENT ON LOCAL FOOD BY HEALTH CARE FACILITIES IN 2016

31 MILLION

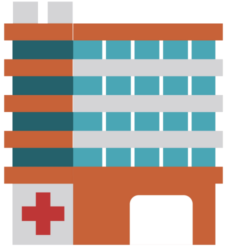
MEALS SERVED BY RESPONDING HEALTH CARE FACILITIES EACH YEAR

15%

OF ANNUAL FOOD BUDGET SPENT ON LOCAL FOOD, ON AVERAGE

50%

OF HEALTH CARE FACILITIES HAVE AN INTERNAL POLICY SUPPORTING LOCAL FOOD



COLLEGE & UNIVERSITY DATA

COLLEGE HIGHLIGHTS

$57 MILLION
SPENT ON LOCAL FOOD BY COLLEGES IN THE LAST FISCAL YEAR

150,000
STUDENTS EAT AT COLLEGES (OVER 65 MILLION MEALS PER YEAR)

21%
OF ANNUAL FOOD BUDGET SPENT ON LOCAL FOOD, ON AVERAGE

98%
OF COLLEGES PLAN TO BUY MORE LOCAL FOOD IN THE NEXT THREE YEARS

TOP LOCAL FOOD PRODUCTS PURCHASED BY COLLEGES AND UNIVERSITIES (BY VALUE)

Apples	47%	Greens	18%
Milk	33%	Beef	17%
Produce	24%	Tomatoes	16%
Potatoes	22%	Fish	16%
Bread	19%	Chicken	13%

PRODUCTS THAT ARE MOST DIFFICULT TO SOURCE LOCALLY FOR COLLEGES AND UNIVERSITIES

43% Poultry	39% Meat	27% Eggs	19% Bakery & Grains
18% Seafood	8% Dairy	2% Fruits	2% Vegetables

Percent of colleges reporting that these products are difficult to source locally

TOP BARRIERS TO GETTING LOCAL FOOD TO COLLEGES

86%
Lack of year-round supply

82%
High price point

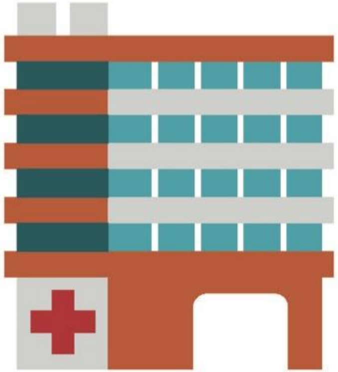
71%
Lack of sufficient volume/variety

69%
Lack of locally processed foods

LOCAL FOOD SPEND

16%

21%



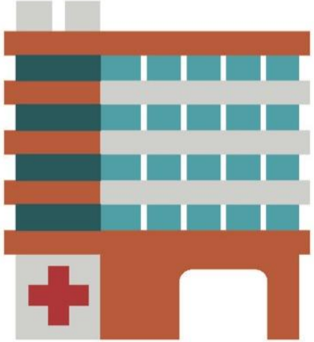
15%

Average percent of food budget spent on local food: 17%

LOCAL FOOD SPEND

$25 Million

$57 Million



$42 Million

Total: $123 million

PRODUCER DATA

PRODUCER HIGHLIGHTS

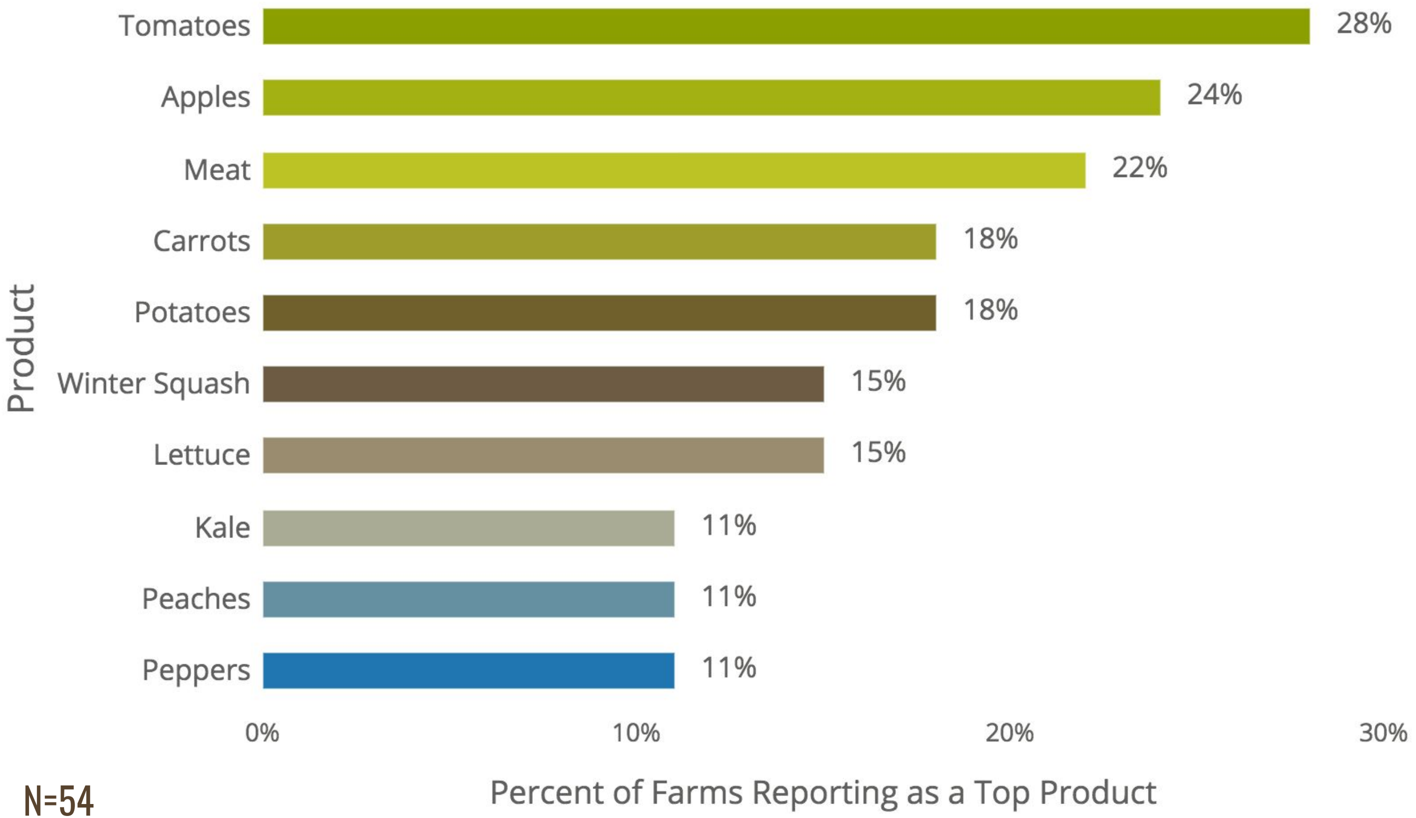
34,877
FARMS IN NEW ENGLAND

71%
OF PRODUCERS SELL PRODUCTS TO INSTITUTIONS OR ARE INTERESTED IN DOING SO

61%
OF PRODUCERS WHO DON'T YET SELL TO INSTITUTIONS ARE INTERESTED IN DOING SO

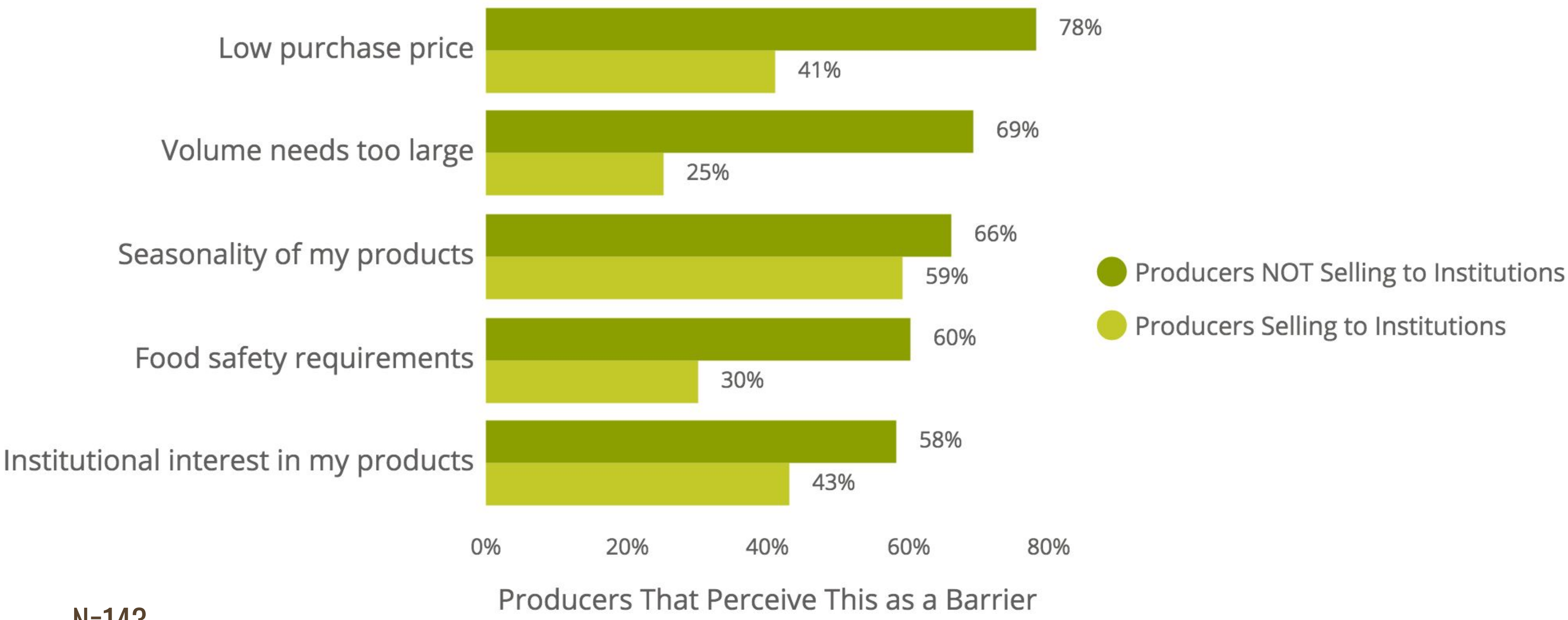
3 ACRES
AVERAGE GROWTH OVER THE LAST THREE YEARS BY PRODUCERS WHO SELL TO INSTITUTIONS

The top 10 local food products sold directly to institutions in New England are...



N=54

Producers are concerned about these five barriers as challenges to selling food to institutions:



N=143

DISTRIBUTOR DATA

REGIONAL DISTRIBUTOR HIGHLIGHTS

$59 MILLION
WORTH OF LOCAL FOOD IS SOLD TO INSTITUTIONS VIA DISTRIBUTORS EACH YEAR

47%
OF TOTAL SALES BY DISTRIBUTORS GOES TO INSTITUTIONS, ON AVERAGE

21%
OF TOTAL GROSS SALES BY FOOD DISTRIBUTORS ARE LOCAL FOOD, ON AVERAGE

88%
OF DISTRIBUTORS BELIEVE THAT THEIR SALES OF LOCAL FOOD TO INSTITUTIONS WILL INCREASE

TOP LOCAL PRODUCTS SOLD TO INSTITUTIONS BY SURVEYED DISTRIBUTORS

PRODUCT TYPE	PRODUCT DETAIL	PERCENT OF DISTRIBUTORS LISTING AS TOP 5 PRODUCT
Apples	Whole or Sliced	43%
Potatoes	Whole or Frozen	43%
Beef	Ground or Portion Cuts	26%
Carrots	Whole or Frozen	26%
Greens	Salad Mix or Head Lettuce	26%
Peppers	Whole, Sliced, or Frozen	26%
Squash	Whole or Frozen	22%
Tomatoes	Various	17%
Broccoli	Including Frozen	13%
Butternut Squash	Including Diced	13%
Cheese	Various	13%
Dairy Products	Various	13%

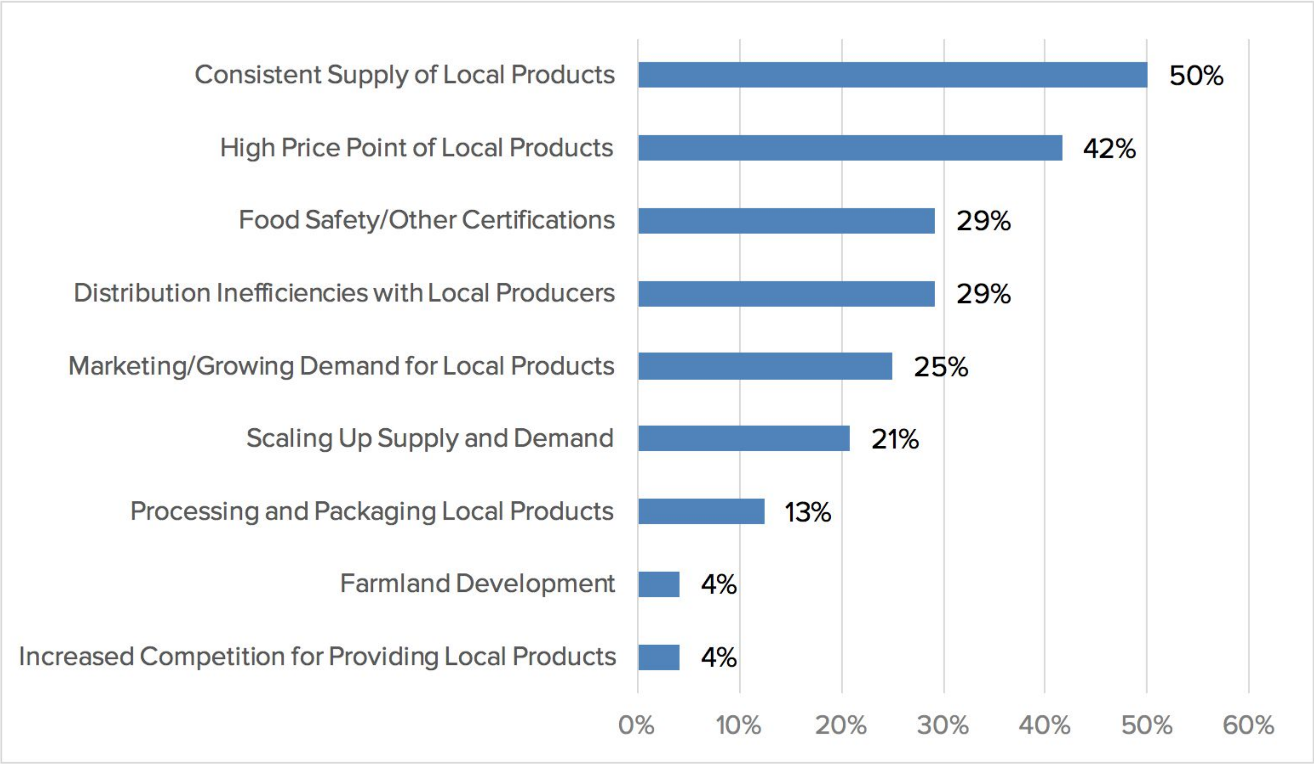
N=23 (Distributors were asked to list up to five of their top products sold to institutions.)

TOP LOCAL PRODUCTS WHERE INSTITUTIONAL DEMAND IS GREATER THAN SUPPLY

PRODUCT TYPE	PRODUCT DETAIL	PERCENT OF DISTRIBUTORS LISTING AS TOP 5 PRODUCT
Meat	Unspecified, Pork Shoulders, Chicken Thigh, Whole Primal Cuts	24%
Salad Greens	Salad Mix, Lettuce, Spinach	19%
Berries	Blueberries, Strawberries, General	14%
Melons	Unspecified, Cantaloupe, Watermelon	14%
Broccoli	Including Frozen	10%
Nectarines		10%
Potatoes	Including Frozen French Fry	10%
Seasonal Products	Unspecified	10%
Tomatoes		10%

N=21 (Distributors were asked to list up to five products where institutional customer demand was greater than supply)

KEY CHALLENGES FOR SURVEYED DISTRIBUTORS



N=24 (Respondents could provide more than one response)

WHAT DO WE DO WITH ALL THIS DATA?

METRICS IMPACT


Photo courtesy of Mad River Food Hub

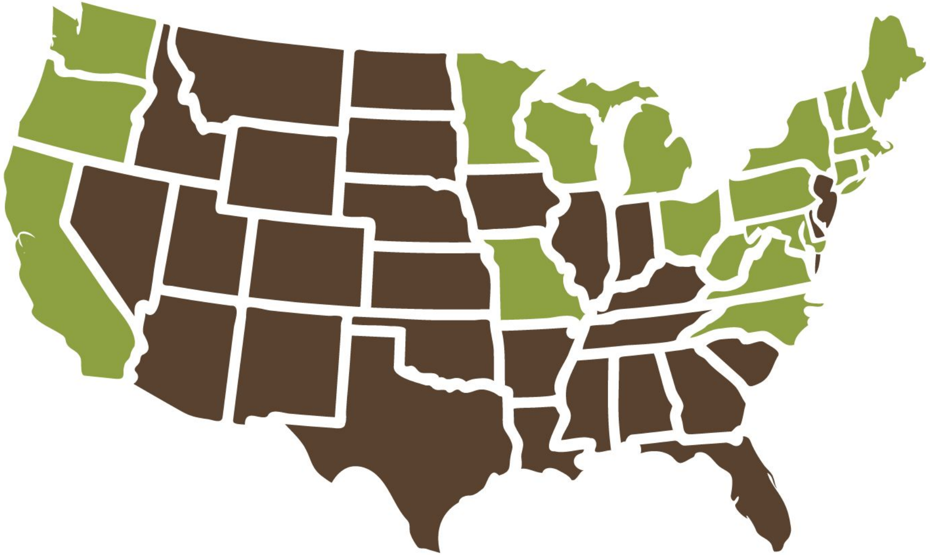
We use our metrics research to educate, advocate, and collaborate with key audiences about our findings and recommendations.

Key audiences include institutions, distributors, farmers, state + federal agencies, state food planners, funder affinity groups, and academic researchers.

METRICS IMPACT

We use our metrics research to help us understand how institutions are contributing to the New England Food Vision, a regional goal to produce 50% of New England's Food by 2060.

METRICS IMPACT



We use our metrics research to participate in the National Farm to Institution Metrics Collaborative, a 30+ member national organization that works across the country to measure and track the impact of the institutional market from producer to buyer.

Q&A

KEEP IN TOUCH

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THANKS FOR
TUNING IN!
Photo: Hampshire College