IFNPAC Q3 Meeting
Interagency Food and Nutrition Policy Advisory Council

Focus: The Economic Impacts of RI's Food System

Wednesday September 14, 2022
10:00 – 11:30am
Location: RI Commerce Corporation
Agenda

• Welcome & Introductions

• Review and approve June 2022 Minutes

• Good Food News! Progress Update
  • Food delivery resource guide (RI Food Policy Council)
  • Growing Farm to School in RI via new USDA Grant (RIDE)
  • Federal grants supporting underserved food producers & improving food security (RIDEM)

• DEEP DIVE: Economic Impacts of RI Food System
  • Measuring the economic impact of our local food system
  • Implications for RI

• Policy Recommendations for RI's Food System

• Public Comments and Discussion
Welcome and Introductions

Department of Environmental Management (DEM)
Terry Gray (Chair), Acting Director
Ken Ayars, Chief of Agriculture

Department of Health (RIDOH)
Randi Belhumeur, Health Systems Transformation Administrator

RI Commerce Corporation (RICC)
Julianne Stelmaszyk, Director of Food Strategy

Department of Education (RIDE)
Jessica Patrolia, Child Nutrition Programs Coordinator

Department of Administration (DOA)
Libby Kimzey, Chief of Staff

Governor's Office
Christopher Abhulime, Deputy Chief of Staff

Office of Healthy Aging (OHA)
Maria Cimini, Director

Department of Human Services (DHS)
Jenna Maloney, Assistant SNAP Administrator

Department of Corrections (DOC)
Terrence McNamara, Administrator Physical Resources
Good Food News
Progress Update

• NEW Food Delivery Resource Guide
• Growing "Farm to School" in RI
• Federal grants supporting local food producers & improving food security
Key Updates: HETF Meeting July 26th, 2022

- 57 Task Force members attended
- Panel discussion featured innovative healthcare programs that provide food assistance, such as vegetable prescriptions and clinics that offer on site food pantries for patients
- Sign up for the RI Food Access Bulletin!
Rhode Island Supplemental Food Delivery Resource Guide Now Available

- Provides a statewide Map and Town by Town List of supplemental food programs that offer free or low cost home delivery

- The resource guide will be included with the minutes from this meeting, please share widely within your agencies!
UPCOMING HETF MEETINGS

Last HETF Meeting of 2022

Tuesday, **October 18**, 2:00 pm - 3:30 pm

Focus: **State of the State of Hunger in RI** and Planning for 2023!

Email caitlin@rifoodcouncil.org to be added to the HETF Email List
Good Food News
Progress Update

Growing "Farm to School" in RI

Jessica Patrolia, RI Department of Education (RIDE)
Growing Farm to School in Rhode Island

Jessica Patrolia, Child Nutrition Programs Coordinator

Why support "Farm to School" Initiatives?
Farmers Win, Communities Win, Kids Win

Pre-COVID, the Federally funded School Nutrition Programs...

- served over 13 million lunches and just under 6 million breakfasts to children and youth throughout the state
- brought in about $42 million in Federal funding to the state

Most school nutrition budgets allow for about 30% food cost, which means that of the $42 million in Federal revenue coming into the state, up to $12.5 million is spent directly on food.

However, of the 45 RI school respondents to the most recent USDA Farm to School Census, only 8 reported including Farm to School activities in specific budget allocations.
The RI Farm to School Network has been working to further the state's F2S efforts, focusing on 3 primary components – local procurement, education, and school garden initiatives. Since 2019, we've been working to:

- Develop a standard, statewide definition of local food
- Create a platform to gather data related to local purchasing efforts
- Establish a network map of stakeholders engaged in Farm to School efforts around the state
- Develop a RI F2S brand and marketing campaign
- Curate a library of school gardening resources
- Streamline and strengthen existing F2S programs such as Harvest of the Month and Local Food Ambassador
- Coordinate and promote F2S events around the state

www.rifarmtoschool.org
Looking Forward – NEW funding ($259K) towards RI farm to school initiatives

The RI Farm to School Network, led by State Agency partners including RIDE, RI DEM, RIDOH and RI Commerce, will continue to support F2S efforts with a focus on procurement and value chain support.

This work is supported by RI DEM's recently awarded USDA Farm to School grant and will include:

1. Hiring the State's first-ever Farm & Sea to School Coordinator
2. Developing a strategic plan to guide the state's F2S efforts for the next 3-5 years
3. Continuing the development and expansion of the RI F2S Network
4. Convening stakeholders to mobilize advocates & partners to further F2S work around the state
Good Food News
Progress Update

Federal grants supporting local food producers & improving food security
Ken Ayars, RI Department of Environmental Management
   Div. of Agriculture & Forestry
### Update on Federal Grants via DEM for Local Food System

#### 2020 - 2021

<table>
<thead>
<tr>
<th>Grant Title</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>USDA Farm to School Grant $96k (2020)</td>
<td></td>
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<tr>
<td>USDA Senior Farmers Market Nutrition Program $297k</td>
<td></td>
</tr>
<tr>
<td><strong>USDA Specialty Crop Block Grant $250k</strong></td>
<td></td>
</tr>
<tr>
<td>EDA Build Back Better Regional Challenge $360k (pending)</td>
<td></td>
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<tr>
<td>USDA Supply Chain Assistance Funding for schools $2.8M</td>
<td></td>
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<tr>
<td>USDA Farm Ranch Stress Assistance Network Grant $559k</td>
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</table>

**Awarded:** ~$4 million

#### 2022

<table>
<thead>
<tr>
<th>Grant Title</th>
<th>Amount</th>
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<tr>
<td>USDA Farm to School Grant $347k</td>
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<tr>
<td>USDA Senior Farmers Market Nutrition Program $297k</td>
<td></td>
</tr>
<tr>
<td><strong>USDA Specialty Crop Block Grant $375k</strong></td>
<td></td>
</tr>
<tr>
<td>USDA Local Food Purchasing Cooperative Agreement $720k</td>
<td></td>
</tr>
<tr>
<td>USDA Local Food for Schools Coop Agreement $560k (in process)</td>
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</table>

**Awarded:** ~$2.2 million  **Pending:** ~$1 million

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Interagency Food and Nutrition Policy Advisory Council (IFNPAC) 9/14/2022
Local Agriculture & Seafood Act (LASA) Grants

Established in 2014 by the RI General Assembly, LASA grants provide low-risk microfunding to new and emerging food producers, helping to support market entry, product innovation and economic opportunity in a low-margin industry.

LASA Grant programs were increased to $700,000 for FY23!

01 Provides "start-up" capital to beginning, young and immigrant food producers

02 Fills a gap in funding for businesses and organizations deemed "not credit-worthy"

03 Helps established food businesses and non-profits innovate by developing new products and accessing new markets

Photo: Hope's Harvest Rhode Island. Providence received $20,000 to enable contracts to grow produce for the local emergency food system, build farmer capacity, and enhance the economic competitiveness of RI-grown agricultural products.

LASA invests in essential food producers
KEY IMPACTS of LASA Grant Program 2014 - 2021

- 84 new jobs
- 101 grant awards to date
- Majority for infrastructure and equipment
- 79% of recipients secured additional funding through grants or loans
- 90% reported revenue increases

Source: From surveys of 65 grantees from 2014 - 2018 (LASA Five Year Report 2019)

$1.13 million
Awarded to date

$2.5 million
Follow on financing leveraged by recipients

$14 million
Increased gross sales for recipients of the LASA grant

Photo: RI Mushroom Company
Deep Dive: Measuring Economic Impacts of the Food System

Measuring the economic impact of New England's Food System (Ellen Kahler, New England Feeding New England)

Implications for Rhode Island (Juli Stelmaszyk, RI Commerce)
RI IFNPAC Presentation

"Measuring the Economic Impact of New England's Food System"

New England Feeding New England

A project of the New England State Food System Planners Partnership

September 14, 2022
Ellen Kahler, Executive Director
Vermont Sustainable Jobs Fund
www.nefoodsystemplanners.org
The New England State Food System Planners Partnership

Ellen Kahler

Erin Hale & Nicole Cardwell

Tanya Swain

Martha Page & Meg Hourigan

Nessa Richman & Julianne Stelmaszyk

Winton Pitcoff & Brittany Peats

In collaboration with

Lisa Fernandes
New England Feeding New England

PROJECT GOAL

By 2030, 30% of the food consumed in New England is produced/harvested/caught within New England.

Our collective effort will focus on expanding and fortifying the region's food supply and distribution systems in an equitable and inclusive way that ensures the availability of adequate, affordable, socially and culturally appropriate products under a variety of rapidly changing climate, environmental, and public health conditions.
New England Feeding New England

PROJECT TIMELINE

By 2030, 30% of the food consumed in New England is produced/harvested/caught within New England.

RESEARCH
2021 through 2022

we are here!

PLANNING
2022 through 2023

IMPLEMENTATION
2023 into 2030 and beyond
Research Overview

- 17-member Research Team assembled and working across 5 research areas

- Research to inform strategy development, investment and policy recommendations that support increasing consumption of food produced in the region to 30% by 2030

- Year-long, multi-layered research to better understand the New England food supply chain, consumer and retail behavior and project what might be possible by 2030
Calculate numbers of jobs and establishments for the 6 state New England region between 2010 – 2020. Determine the level of occupational segregation by race/ethnicity related to employment. [presented 11/16/21]


Update the Dietary Needs estimates from the New England Food Vision with more current data on production and trends + current USDA MyPlate guidelines.

Regional market channel study to analyze consumption and purchasing patterns and identify potential demand for regionally produced food within each market channel.

Identify and quantify targets necessary to produce and distribute 30% of the food needed by New Englanders, representing the diversity of ethnic, racial, and cultural preferences, in New England, by 2030.
## Measuring Economic Impact of the New England Food System


<table>
<thead>
<tr>
<th>Sector</th>
<th>Sales ($2020, 000s)</th>
<th>Annual Sales Growth Rate (% Growth per Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture and Fisheries</td>
<td>4,591,867</td>
<td>4,384,963</td>
</tr>
<tr>
<td>Food Product Manufacturing</td>
<td>22,948,659</td>
<td>19,698,305</td>
</tr>
<tr>
<td>Trade and Distribution</td>
<td>104,797,226</td>
<td>112,717,864</td>
</tr>
<tr>
<td>Services</td>
<td>31,787,648</td>
<td>32,291,029</td>
</tr>
<tr>
<td>Total</td>
<td>164,125,400</td>
<td>169,092,162</td>
</tr>
</tbody>
</table>

Measuring Economic Impact of the New England Food System

Chart 8
New England Food System: Composition of Food Product Manufacturing, 2017 Sales

- Fluid Milk, 9%
- Cheese, 3%
- Other Dairy Products, 6%
- Animal Slaughtering and Processing, 6%
- Seafood Products, 9%
- Bakeries and Tortilla, 15%
- Other Food Products, 20%
- Brewerries, 5%
- All Other Beverages, 13%
- Animal Food, 2%
- Grain and Oilseed Milling, 1%
- Sugar and Confectionary Products, 4%
- Fruit and Vegetable Preserving, 7%
# Measuring Economic Impact of the Rhode Island Food System


<table>
<thead>
<tr>
<th>Sector</th>
<th>Sales ($2020, 000)</th>
<th>Annual Sales Growth Rate (% Growth per Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture and Fisheries</td>
<td>201,516.6</td>
<td>167,242.1</td>
</tr>
<tr>
<td>Food Product Manufacturing</td>
<td>1,020,618.2</td>
<td>920,589.5</td>
</tr>
<tr>
<td>Trade and Distribution</td>
<td>5,654,137.4</td>
<td>6,704,219.4</td>
</tr>
<tr>
<td>Services</td>
<td>2,402,290.2</td>
<td>2,417,179.6</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>9,278,562.4</td>
<td>10,209,230.7</td>
</tr>
</tbody>
</table>

## Measuring Economic Impact of the Rhode Island Food System


<table>
<thead>
<tr>
<th>Sector</th>
<th>Sales ($2020, 000)</th>
<th>Annual Sales Growth Rate (%)</th>
<th>2007-2012</th>
<th>2012-2017</th>
<th>2007-2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fisheries</td>
<td>116,294.0</td>
<td></td>
<td>109,559.0</td>
<td>109,856.0</td>
<td>-1.2%</td>
</tr>
<tr>
<td>Seafood Products</td>
<td>51,896.3</td>
<td></td>
<td>0.0</td>
<td>0.0</td>
<td>.1%</td>
</tr>
<tr>
<td>Total</td>
<td>168,190.3</td>
<td></td>
<td>109,559.0</td>
<td>109,856.0</td>
<td>-0.6%</td>
</tr>
</tbody>
</table>

## Economic Multipliers for the New England Food System

### States and Region, 2017

<table>
<thead>
<tr>
<th>State/Multiplier</th>
<th>Output Type I</th>
<th>Output Type II</th>
<th>Value Added Type I</th>
<th>Value Added Type II</th>
<th>Employment Type I</th>
<th>Employment Type II</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connecticut</td>
<td>1.42</td>
<td>1.81</td>
<td>1.42</td>
<td>1.86</td>
<td>1.22</td>
<td>1.45</td>
</tr>
<tr>
<td>Maine</td>
<td>1.46</td>
<td>1.91</td>
<td>1.47</td>
<td>2.00</td>
<td>1.29</td>
<td>1.60</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>1.44</td>
<td>1.94</td>
<td>1.46</td>
<td>2.05</td>
<td>1.22</td>
<td>1.51</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>1.49</td>
<td>1.94</td>
<td>1.52</td>
<td>2.08</td>
<td>1.24</td>
<td>1.50</td>
</tr>
<tr>
<td>Rhode Island</td>
<td>1.45</td>
<td>1.90</td>
<td>1.43</td>
<td>1.92</td>
<td>1.23</td>
<td>1.49</td>
</tr>
<tr>
<td>Vermont</td>
<td>1.53</td>
<td>1.88</td>
<td>1.67</td>
<td>2.23</td>
<td>1.44</td>
<td>1.77</td>
</tr>
<tr>
<td>NEW ENGLAND</td>
<td>1.45</td>
<td>1.90</td>
<td>1.47</td>
<td>2.01</td>
<td>1.24</td>
<td>1.52</td>
</tr>
</tbody>
</table>

Source: Kavet, Rockler and Associates using the Implan Model

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<tr>
<th></th>
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<th></th>
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</thead>
<tbody>
<tr>
<td></td>
<td>2007</td>
<td>2012</td>
<td>2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agriculture and Fisheries</td>
<td>127,575</td>
<td>134,643</td>
<td>127,072</td>
<td>1.1%</td>
<td>-1.2%</td>
</tr>
<tr>
<td>Food Product Manufacturing</td>
<td>48,239</td>
<td>47,619</td>
<td>52,979</td>
<td>-0.3%</td>
<td>2.2%</td>
</tr>
<tr>
<td>Trade and Distribution</td>
<td>241,668</td>
<td>257,583</td>
<td>258,489</td>
<td>1.3%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Services</td>
<td>471,494</td>
<td>495,349</td>
<td>560,737</td>
<td>1.0%</td>
<td>2.5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>888,976</strong></td>
<td><strong>935,194</strong></td>
<td><strong>999,277</strong></td>
<td><strong>1.0%</strong></td>
<td><strong>1.3%</strong></td>
</tr>
</tbody>
</table>

## Measuring Economic Impact of the Rhode Island Food System


<table>
<thead>
<tr>
<th>Sector</th>
<th>Employment (Jobs)</th>
<th>Annual Employment Growth Rate (% Growth per Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture and Fisheries</td>
<td>4,908</td>
<td>5,091</td>
</tr>
<tr>
<td>Food Product Manufacturing</td>
<td>2,815</td>
<td>2,677</td>
</tr>
<tr>
<td>Trade and Distribution</td>
<td>14,296</td>
<td>14,750</td>
</tr>
<tr>
<td>Services</td>
<td>40,319</td>
<td>40,040</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>62,338</td>
<td>62,558</td>
</tr>
</tbody>
</table>

Employment by Food Category

Rhode Island Food System Employment by Category

- Restaurants + Bars
- Food Stores
- Food + Beverage Processing + Manufacturing
- Distribution + Storage
- Fishing
- Hired Farm Workers
- Farm Operators
- Solid Waste Collection
- Farm Inputs
- Community Food Services
- Regulatory
Key Take Aways

1. New England’s Food System is important in and of itself in terms of size (jobs, sales).

2. It has not historically had high growth activity viewed as a whole, but certain industries, most recently brewing, local farm product and supply wholesaling, have seen very high growth rates.

3. Policy needs to be concerned with size, growth, and interconnections in the regional food system. Emphasis on one dimension is likely to be ineffective for the long-run.
Research: Next Steps

• Nearing completion of 1st draft writing phase
• Final draft, editing, layout, printing
• Report release sometime in late November or early December
• Taking the report on the road in 2023 – lots of presentations!
For more information, contact your state lead, email nefne@vsjf.org, or visit www.nefoodsystemplanners.org

Thank you!
Implications for Rhode Island in 2023 and beyond...

Juli Stelmaszyk, Director of Food Strategy at RI Commerce

- RI's food economy is larger than we thought at 18% of total State GDP
- The food economy overall is growing, but not equally.
- We are still missing key economic indicators such as:
  - local food consumption and
  - accurate agricultural economy data
Policy Recommendations for Rhode Island's Food System

Rhode Island Food Policy Council
Nessa Richman, Executive Director
Building a more just and resilient food system for all Rhode Islanders.

Independent Network • 501c3 • Est. 2011
CLEAN AIR
SUPPORTIVE POLICY
CLEAN WATER
CLEAN SOIL
LAND ACCESS
CAPITAL ACCESS
FOOD WASTE
CONSUMPTION
RETAIL
DISTRIBUTION
PROCESSING
Farms & Fisheries Production
RHODE ISLAND FOOD SYSTEM HIGHLIGHTS

$12B
FOOD SECTOR ECONOMIC OUTPUT

75,800
FOOD JOBS

55,000
ACRES IN FARMLAND

1,043
FARMS

$100M
WILD-CAUGHT SEAFOOD AND AQUACULTURE VALUE

1 IN 6
HOUSEHOLDS STRUGGLING WITH HUNGER
KEY POINTS FROM THE 2022 NETWORK SURVEY

High-Priority Activities for Improving RI’s Food System by 2030:

- Preserve and protect agricultural land
- Reduce inequity in the food system
- Support small food businesses (providing capital & technical assistance)
- Ensure access to affordable, culturally-appropriate food for all people
- Promote climate-smart practices

512 TOTAL RESPONSES
OUR GOALS: 2023-2030

New England Feeding
New England: Cultivating a Reliable Food Supply
POLICY PRIORITIES FOR THE 2023 LEGISLATIVE SESSION

- Preserve our farms
- Ensure food access
- Protect our environment
- Support our businesses
Support land access for farming across Rhode Island by ensuring consistent, adequate funding for the Agriculture Land Preservation Commission, increased and sustained funding for the Farmland Access Program, and by creating a funded “Urban Farmland Access Program.”
Develop a comprehensive strategy for minimizing and diverting wasted food going into the landfill that includes tax incentives for excess food donation as well as wider mandates and increased support for residential and commercial organic waste composting.
POLICY PRIORITIES FOR THE 2023 LEGISLATIVE SESSION

Ensure food access

Support new, sustainable avenues for local farmers, seafood harvesters and other businesses (e.g., manufacturers and restaurants) to easily sell and deliver nutritious food to direct and indirect wholesale (e.g. school) markets that serve food insecure communities and residents.
Support second stage food businesses with shared-use infrastructure, marketing and technical assistance, grants, tax incentives, and low-cost loans. Require that a set percentage of selected incentives and grants go to historically underserved business owners.
Open Discussion and Comment
THANK YOU!

Next Meeting:

Q4 IFNPAC
Tuesday December 13th
9:30am-11:00am
RI Commerce Corporation