

POLICY FOR THE PEOPLE

TUESDAY, JANUARY 21 12-1PM

2025 RI Food System Factbook



AGENDA

Who we are Factbook overview Using the Factbook Q&A





Who is **RIFPC**?

RI FOOD POLICY COUNCIL

Our mission is to build an equitable, accessible, economically vibrant, and environmentally sustainable food system for all Rhode Islanders.



COMMITMENT TO EQUITY

RIFPC recognizes the fact that many negative impacts of Rhode Island's current food system are grounded in a history of colonialism, genocide of indigenous people, slavery, private ownership of land, and the concentration of wealth and power in the hands of too few.

We also recognize that people with visible and non-apparent disabilities are among the most marginalized groups in our country. **RIFPC believes** that when power shifts to be shared more equitably across our communities and our state, we transform our future together for generations to come.

Core Issue Areas

RI FOOD POLICY COUNCIL



Food Access & Nutrition Security Building equitable, culturally-relevant solutions to food and nutrition access problems.



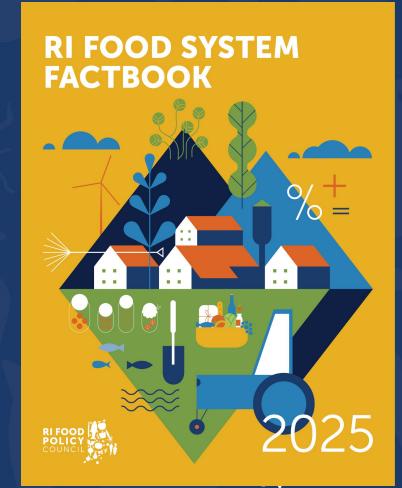
Food Business & Economic Development Empowering farmers, aquaculturists, fishers, and food entrepreneurs to thrive.

Food, Climate, & Environment

Addressing issues at the intersection of climate change and food systems.



A **data-driven landscape** of the status of Rhode Island's Food System



You can use this data to help achieve your mission:

- Set strategic goals for your organization
- Establish measurable objectives for your projects and programs
- Add key facts to grant proposals
- **KEY Features**
- Trusted sources, clear citations
- Interactive charts

- Emphasize a trend during public speaking opportunities
- Support your views in testimony at the State House

🖌 Regularly updated data

Easy to understand descriptions

Big picture trends are noted throughout:

POSITIVE TREND Employment increase





▲ Land in agriculture decrease

NO TREND

Food insecurity rate

No trend may mean that an indicator has not changed over time, or that only a snapshot in time is depicted.



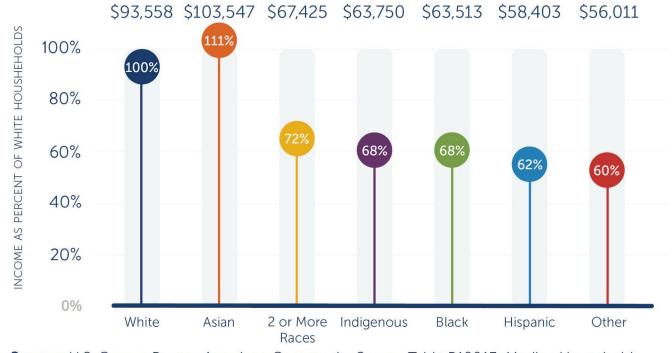


Equity and Justice

Every dataset with demographic information reveals inequities based on race, ethnicity, gender, educational attainment, place of residence, and other variables.



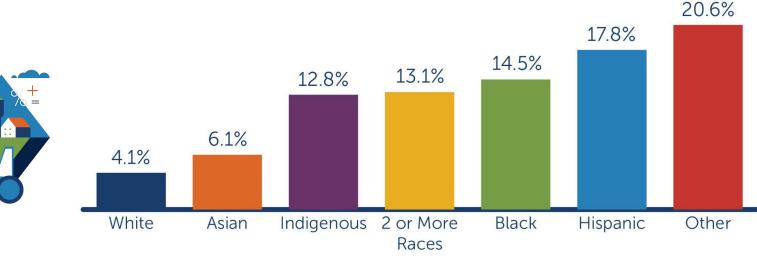
Median Household Income by Race/Ethnicity, 2023





Source: U.S. Census Bureau American Community Survey, Table B19013: Median Household Income, 2023 5-Year Estimates.

Poverty Status in Past 12 Months of Families by Race/ Ethnicity, 2023

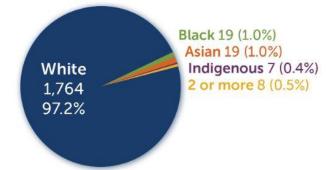




Source: U.S. Census Bureau American Community Survey, Table B17010: Poverty Status in the Past 12 Months of Families by Family Type, 2023 5-Year Estimates.

Rhode Island Farmers by Race, 2022





Source: USDA 2022 Census of Agriculture, Selected Producer Characteristics by Race.

The Census of Agriculture recorded **1** non-White farmer in Rhode Island in <u>1992</u>. Thirty years later, the Census of Agriculture recorded 54 Black, Asian, Indigenous and biracial farmers, or 2.8% of all farmers, and 32 Hispanic farmers (1.7% of farmers). Unequal access to farmland limits opportunities to self-determination, wealth building, and culturally appropriate food.





Food System Economy

Is Rhode Island's food system moving in the right direction?



Economy



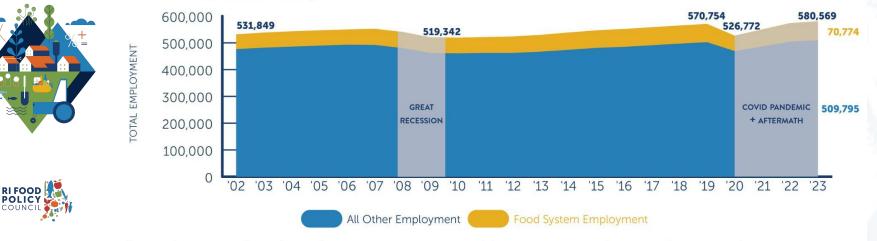


_	2024 FACTBOOK	2025 FACTBOOK	LONG-TERM TREND				
EMPLOYMENT	> 69,000 2022	> 70,000 2023	+15,515 2002-2023	~7			
BUSINESSES	> 8,800 2022	> 8,900 2023	+1,745 2002-2023	~7			
TOTAL SALES	\$17.3 billion	\$17.8 billion	+\$499 million 2017-2022	~7			
MEDIAN				_			
HOURLY WAGE Food Preparation + Serving major occupational category —	\$14.97 2022	\$15.96 2023	+\$2.56 2002-2023	\sim			
occupational caregoly	NEW INDICATOR						
GROCERY STORE MARKET CONCENTRATION		42.1% 2023	Ahold Delhaize (Hannaford) is estimated to have 42.1% market share				

Total and Food System Employment, 2002-2023



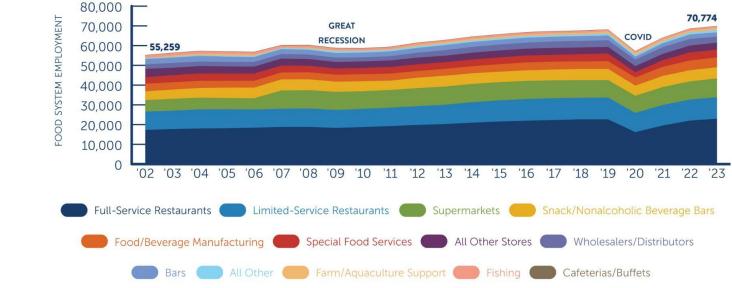
Total employment in Rhode Island increased **9.2%** from 2002 (531,849) to 2023 (580,569). Food system jobs account for about **12.2% (70,774)** of all jobs in Rhode Island. This is likely an undercount because we are unable to specify all possible food system jobs (e.g., "general freight trucking" accounts for over 1,500 jobs in Rhode Island. However, although all food ultimately moves via transportation, we can't delineate trucking jobs that are exclusively for food distribution).



Sources: U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages, and U.S. Census Bureau Nonemployer Statistics. The U.S. Bureau of Labor Statistics provides estimates of *covered* employment—work that is covered by unemployment insurance benefits. *Non-covered* employment, or nonemployer statistics, refers to jobs that are excluded from unemployment insurance reporting requirements. Non-covered employment is mostly made up of sole proprietors and partnerships with no paid employees. Combining both data sources together provides a more comprehensive picture of employment in Rhode Island. Farm employment is not captured very well by either data source. Estimates of the number of farmers and hired farmworkers are produced every 5 years by the USDA Census of Agriculture and are not shown in this figure.

FOOD SYSTEM EMPLOYMENT, 2002-2023

POSITIVE TREND
 Total food system jobs in Rhode Island increased 28.1%, from from ≈55,000 in 2002 to nearly **71,000** in 2023.
 "Food services and drinking places" (e.g., restaurants, fast food, institutional food services, bars) account for the majority of food system jobs - over 45,000 jobs.



Sources: U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages, and U.S. Census Bureau Nonemployer Statistics. Estimates of the number of farmers and hired farmworkers are produced every 5 years by the USDA Census of Agriculture and are not shown in this figure. "All other stores" includes convenience stores, specialty food stores, liquor stores, health food stores, and vending machine operators. Employment at warehouse clubs and supercenters was suppressed. "All other" includes community food services (e.g., food pantries), solid waste collection, and agricultural market and commodity regulation.





Economy

ECONOMIC IMPACT OF RHODE ISLAND'S FOOD SYSTEM, 2022

New England Feeding New England estimated the overall economic impact of New England's food system based on data from 2017 (and adjusted for inflation to 2020 dollars). Using data from the 2022 Economic Census and other sources, we can update the previous estimates and provide a new range of values in 2024 dollars. Food Services and Drinking Places accounted for the majority of food system jobs and grew slightly from 2017 to 2022. Retail Food Stores, Food Wholesaling and Distribution, and Food Services and Drinking Places accounted for the majority of sales. Food and Beverage Manufacturing both experienced double-digit percent increases in employment and sales.

	2022 Employment	% of Total	Growth from 2017- 2022	2022 Sales	% of Total	Growth from 2017- 2022
Agriculture	3,765*	5.2%	1.0%	\$95,010,788	0.5%	41.6%
Fisheries	911	1.3%	-7.8%	\$103,285,241	0.6%	-19.9%
Aquaculture	56	0.08%	n/d	\$8,364,885	0.05%	-2.8%
Food Manufacturing	4,240	5.9%	18.8%	\$1,191,336,966	6.7%	52.7%
Beverage Manufacturing	723	1.0%	57.2%	\$137,421,135	0.8%	32.5%
Wholesaling + Distributing	3,370	4.7%	3.2%	\$6,092,000,591	34.1%	-17.5%
Stores	12,813	17.8%	3.5%**	\$6,339,713,204	35.5%	19.0%
Food Services + Drinking Places	45,245	62.7%	0.8%	\$3,707,209,951	20.8%	9.5%
All Others	1,028	1.4%	26.6%	\$162,747,829	0.9%	18.0%
TOTAL	72,151	100.0%	3.0%	\$17,838,203,588	100.0%	2.9%

Sources: 2017 and 2022 Economic Censuses; 2017 and 2022 USDA Census of Agriculture; 2017 and 2022 U.S. Census Bureau Nonemployer Statistics; Atlantic Coastal Cooperative Statistics Program; Rhode Island Coastal Resources Management Council. Adjusted for inflation with producer price indices and consumer price index to 2024 dollars. * We are using employment values for farmers and hired farm labor in this table since the Census of Agriculture and Economic Census were both conducted in 2017 and 2022. ** The value of "Warehouse Clubs and Supercenters" employment was suppressed in 2017 and 2022 so we do not have a full picture of retail store employment.





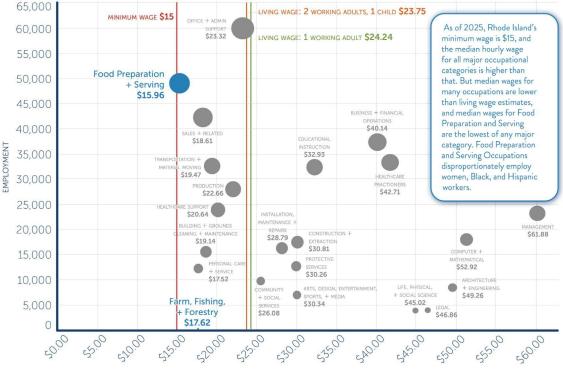
Economy



RI FOOD POLICY

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MEDIAN HOURLY WAGE

Sources: U.S. Bureau of Labor Statistics, May 2023, Occupational Employment and Wage Statistics. Living Wage Calculator, Living Wage Calculation for Rhode Island. A living wage is the amount that 2 adults with 2 children would have to earn per hour to meet 8 basic needs in Rhode Island: housing, transportation, food, childcare, health care, civic engagement (e.g., entertainment), broadband, other necessities (e.g., clothing), and taxes. Adjusted for inflation to 2024 dollars.

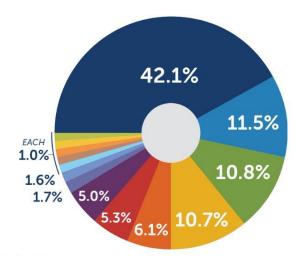
ESTIMATED MARKET SHARE OF GROCERY STORES IN RHODE ISLAND

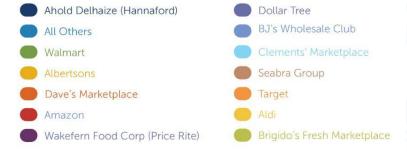


The Grocery Gap Atlas estimates that 81% of state markets are less concentrated than Rhode Island, while 19% of all states are more concentrated.



RI FOOD





All Others includes dozens of corner markets, specialty food stores (e.g., meat markets) and other independent grocery stores.

Source: Grocery Gap Analysis.

Food Access & Security

Is food insecurity in RI increasing or decreasing? Are some residents disproportionately impacted?





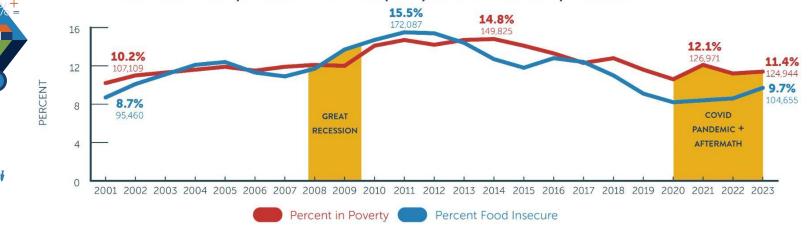


	2024 FACTBOOK	2025 FACTBOOK	LONG-TEI TREND	
PEOPLE IN POVERTY	11.2% 2022	11.4% 2023	12.4% 2001-2023	
FOOD INSECURE	8.6%	9.7% 2023	11.6% 2001-2023	
PEOPLE SERVED BY FOOD BANK	77,500 2023	84,400 2024	+25,400 2016-2024	~7
NONWHITE POPULATION RECEIVING SNAP BENEFITS	34.8% 2018 5-year average	28.1% 2023 5-year average	More data collection necessary	
WHITE POPULATION RECEIVING SNAP BENEFITS	11.2% 2018 5-year average	9.6% 2023 5-year average	More data collection necessary	

POVERTY AND FOOD INSECURITY, 2001-2023

NO TRENE

The percent of Rhode Islanders in poverty gradually increased from 2001 to 2009. Poverty then jumped several percentage points due to the Great Recession and lingered at over **14%** for six years. Poverty then decreased from 2014 to 2019, although it did not go below the percentage in 2001. The COVID-19 pandemic then spiked the percent of Rhode Islanders in poverty to **12.1%** (**126,971 people**), before decreasing to **11.4%** (**124,944 people**) in 2023. Food insecurity in Rhode Island mirrors poverty trends and has recently increased.



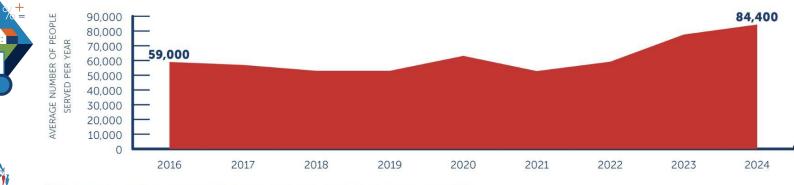
Sources: U.S. Census Bureau Small Area Income and Poverty Estimates (via FRED) and USDA Economic Research Service, Household Food Security in the United States, multiple years.

AVERAGE NUMBER OF PEOPLE SERVED BY CHARITABLE FOOD SYSTEM

NEGATIVE TREND

RI FOOD

In 2024, the <u>Rhode Island Community Food Bank</u> estimated that a record number of Rhode Islanders—**84,400** sought assistance through the Food Bank and its network of 147 member agencies. High food prices due to supply chain disruptions—like the COVID-19 pandemic, war in Ukraine, and avian influenza outbreak—and the ending of emergency SNAP benefits in 2023 are thought to be the primary drivers of the increased need for food assistance.



Source: Rhode Island Community Food Bank, Status Report on Hunger in Rhode Island, multiple years.

Agriculture & Land Use

What kinds of agricultural products does RI grow/harvest? Is RI's agriculture sector growing or contracting?







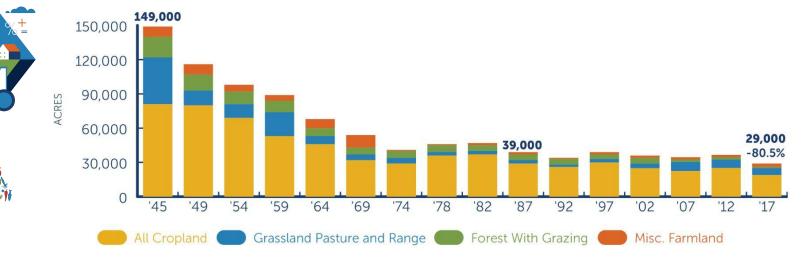
	2024 FACTBOOK	2025 FACTBOOK	LONG-TERM TREND			
MAJOR LAND	36,647 2012	29,000 2017	-120,000 1945-2017	\sim		
AG CENSUS ACRES	56,864 2017	59,076	-1,745 2002-2022	\sim		
FARMLAND VALUE/ACRE	\$18,874 2023	\$22,000 2024	+\$1,745 2006-2024	\sim		
TOTAL SALES DOES NOT INCLUDE USDA AQUACULTURE ESTIMATES	\$62,447,411 2017	\$86,645,903 2022	+ \$24,198,492 2017-2022	\sim		
SALES BY ECONOMIC CLASS	0.5% farms accounted for 28.8% of sales 2017 farms with sales >\$1 million	2.0% farms accounted for 49.7% of sales 2022 farms with sales \$1 million	Widening gap	~7		
RACE OF FARMER	98% White	97% White	+53 Non- White Farmers			

MAJOR AGRICULTURAL LAND USES IN RHODE ISLAND, 1945-2017



RI FOOD

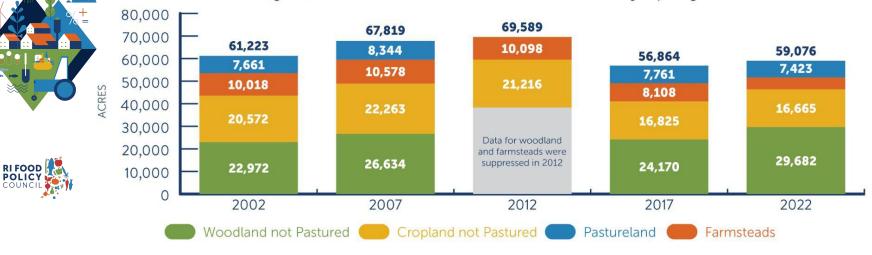
The <u>USDA's Major Land Uses series</u> is the "longest running, most comprehensive accounting of all major land uses of public and private land in the United States." This series shows a steep decrease in land in agriculture in RI after World War II that flattens out around 1987. Since then, acreage has remained ≈36,000 acres, comprised mostly of cropland. Acreage then dropped steeply to 29,000 acres in 2017.



Source: USDA Major Land Uses. Data for 2022 has not been published. Note: the Major Land Uses series designates "forest with grazing" and not the total amount of forest land (i.e., "woodland") owned by farmers, as shown in the figure below.

LAND IN AGRICULTURE, 2002-2022

The <u>2022 Census of Agriculture</u> estimates a larger amount of land in agriculture than the Major Land Uses series because it includes *all* woodland owned by a farm. Land in agriculture is estimated to have increased from 2002 to 2012, decreased from 2012 to 2017, and then increased from 2017 to 2022. An important point to emphasize, however, is that cropland, pastureland, and farmstead acreage generally *decreased*, while woodland estimates went up and down. Washington (35%) and Providence (28.7%) counties contain the majority of agricultural land.



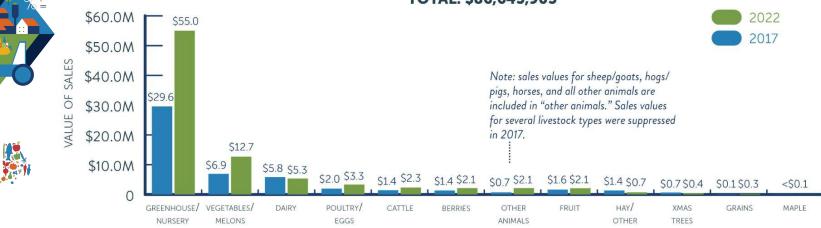
Source: USDA Census of Agriculture, multiple years.

AGRICULTURAL SALES, 2022



RI FOOL

Agricultural sales in Rhode Island increased from \$62.4 million in 2017, to \$86.6 million in 2022. With its limited landmass, Rhode Island is heavily invested in **inedible products**. Greenhouses/nurseries/floriculture accounted for 21.9% of farms and 63.5% of sales in 2022, and most of the sales increase from 2017 to 2022 was due to greenhouse/nursery/floriculture sales.



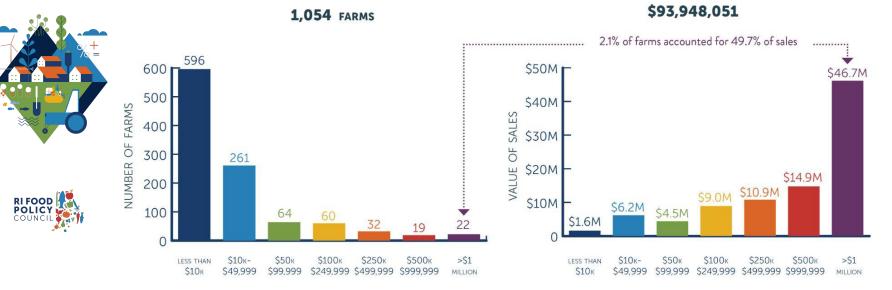
TOTAL: \$86,645,903

Source: USDA 2017 and 2022 Censuses of Agriculture. Adjusted for inflation to 2024 dollars. Agriculture sales in this figure also do not include agricultural support activities or aquaculture.

NUMBER OF FARMS AND SALES BY ECONOMIC CLASS, 2022



As with most states in the country, a fundamental scale asymmetry is evident in Rhode Island agriculture: Small farms make up the majority of farms but they have comparatively limited sales. A small number of large farms—selling mostly nursery/greenhouse/floriculture products—generate the majority of sales.



Source: USDA 2022 Census of Agriculture, Market Value. Adjusted for inflation to 2024 dollars with produce price indices. Note: figure *does* include USDA estimates of aquaculture sales.

Commercial Fisheries & Aquaculture

What kinds of seafood products does RI harvest? Are commercial fishing/aquaculture growing or contracting?



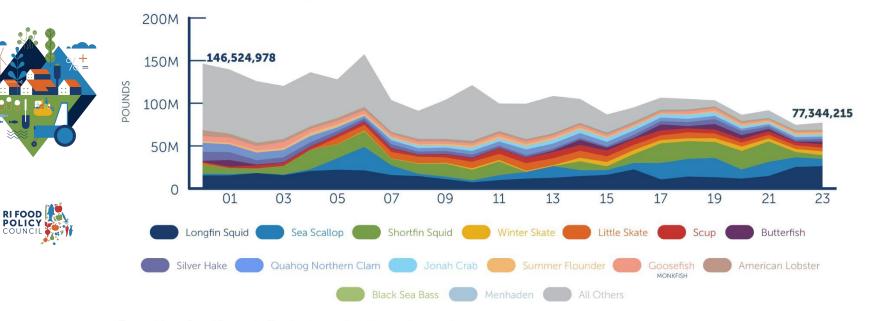


	2024 FACTBOOK	2025 FACTBOOK	LONG-TERM TREND		
LANDINGS POUNDS	74,701,068	77,344,215 2023	- 69,180,763 2000-2023	\sim	
SALES	\$106,789,777 2022	\$89,639,504	- \$75,756,946 2000-2023	\sim	
AQUACULTURE ACRES	374 2022	384.3 2023	+330.6	\sim	
AQUACULTURE SALES	\$8,364,885 2022	\$8,496,065 2023	+≈\$8 million	~7	

COMMERCIAL SEAFOOD LANDINGS, 2002-2023



Total pounds of seafood landed by commercial Rhode Island fishermen decreased by **47.2%** from 2000 (146 million pounds) to 2023 (77 million pounds), although seafood landings have been relatively consistent over the past 13 years. Together, longfin and shortfin squid accounted for 40% of pounds landed in 2023.

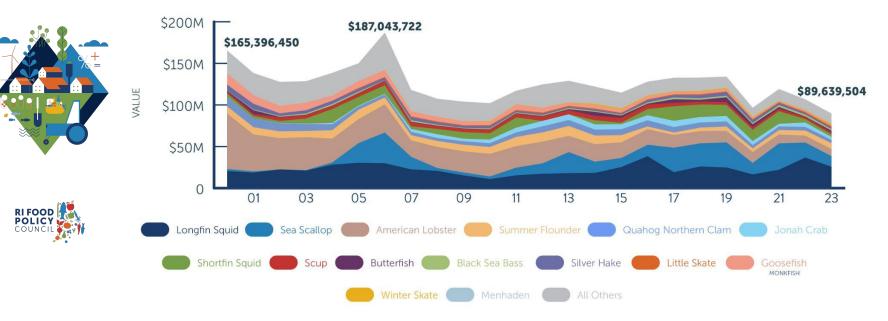


Source: Atlantic Coastal Cooperative Statistics Program. Note: Live pounds are used here.

VALUE OF COMMERCIAL SEAFOOD LANDINGS, 2002-2023



Except for a spike in 2006 and a valley in 2020 due to the COVID-19 pandemic, the total value of seafood landed by Rhode Island fishers has been *relatively* consistent over the past 23 years at over \$100 million. Longfin squid (29.2%) and sea scallop (14.4%) accounted for 43.6% of the value.



Sources: NOAA Fisheries and the Atlantic Coastal Cooperative Statistics Program. Adjusted for inflation to 2024 dollars using producer price indices.

AQUACULTURE PRODUCTION, 2002-2023

POSITIVE TREND

Eastern oysters, the most valuable seafood species coming out of Rhode Island waters, account for about 98% of all Rhode Island aquaculture production. Rhode Island has experienced steady growth in its aquaculture industry over the past 20 years, from 54 acres in 2002, to 384 acres in 2023. Aquaculture sales were about \$315,000 in 2002 and over \$8.2 million in 2019. Sales dipped dramatically in 2020 due to the COVID-19 pandemic since most Eastern oysters are served in restaurants. Sales subsequently rebounded to a little more than \$8 million from 2021 to 2023.



Source: Coastal Resources Management Council. Adjusted for inflation to 2024 dollars using unprocessed shellfish producer price index. PPI values are not available prior to 2007.

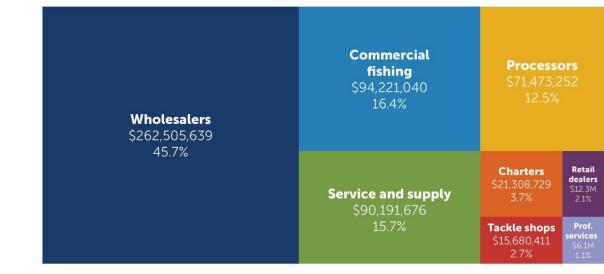
GROSS SALES OF RHODE ISLAND'S SEAFOOD SECTOR, 2016

NO TREND

RI FOOD

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Dr. Thomas Sproul (formerly at the University of Rhode Island) estimated nearly **\$575 million** in sales from Rhode Island's seafood and fisheries sector in 2016. Wholesalers (e.g., importers and exporters, brokers) generated 45.7% (\$274 million) in sales, followed by commercial fishing (16.4%, \$98.5 million) and service and supply businesses (e.g., nets, commercial tackle and gear, boat and equipment maintenance).



TOTAL = \$573,853,999

Source: Dr. Thomas Sproul and Clayton Michaud, 2019, The Economic Impact of Rhode Island's Fisheries and Seafood Sector, University of Rhode Island.

Climate Change

How is climate change impacting RI's food system?



Climate

KEY STATS





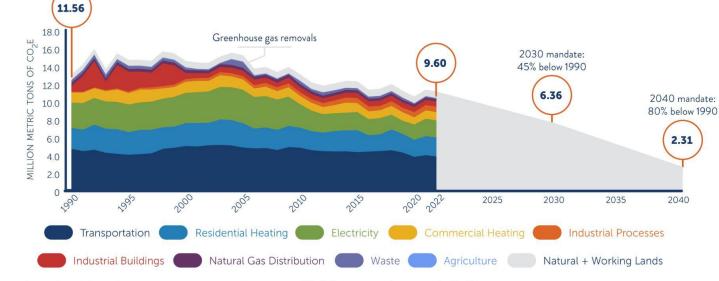
	2024	2025	LONG-TERM
	FACTBOOK	FACTBOOK	TREND
NET GHG	9.03	9.60	- 1.96
EMISSIONS	2020	2022	
AVERAGE AIR	52.7°F	54.0°F	+ 5.0°F 2024 compared to average
TEMPERATURE	2023	2024	
BILLION DOLLAR DISASTERS	32 2023	34 2024	1.8
		NEW INDICATOR	
METRIC TONS OF CO2E FROM WASTED FOOD	852,000 2022	843,000 2023	+106,000

GREENHOUSE GAS INVENTORY, 1990-2022

POSITIVE TREND

RI FOOD

Net greenhouse gas emissions decreased **18.3%** from 11.56 MMCO2e in 1990, to **9.60 MMCO2e in 2022**. Transportation continues to be the largest source of emissions in Rhode Island. Emissions reductions for transportation from 2019 to 2020 are likely due to pandemic restrictions on travel (e.g., -79.6% for aviation emissions). Additional substantial decreases are required to meet 2030 and 2040 <u>mandates</u>.

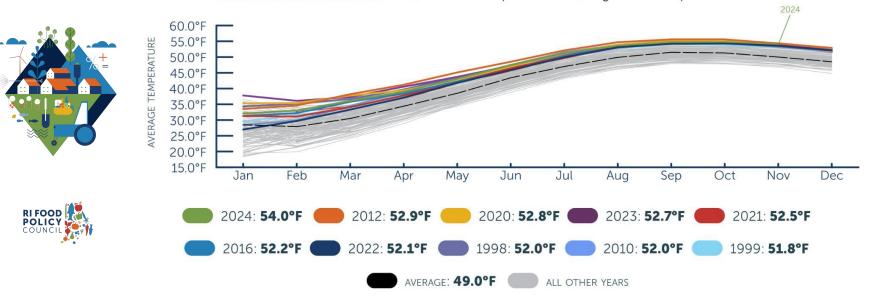


Source: State of Rhode Island Department of Environmental Management, 1990-2022 Rhode Island Greenhouse Gas (GHG) Emissions Inventory.

AVERAGE ANNUAL TEMPERATURE, 1895-2024



Eight of the ten warmest years on record in Rhode Island-**2024**, **2012**, **2020**, **2023**, **2021**, **2016**, **2022**, **2010**, -have happened since the 2010s. 2024 was the warmest year on record, globally and in Rhode Island. As the <u>Fifth</u> <u>National Climate Assessment</u> warns, "the more the planet warms, the greater the impacts."



Source: NOAA National Centers for Environmental Information, Climate at a Glance: Statewide Haywoods.

Climate

FOOD WASTE, 2015

A 2015 "Waste Characterization" study found that food waste (vegetative and protein) is the top single material in Rhode Island's municipal waste stream at 100,000 tons (2 million pounds). Residential food waste accounted for 60.6% (60,677 tons) of total food waste, while industrial, commercial, and institutional food waste accounted for 39.4% (39,453 tons). As food waste decomposes, methane—a greenhouse gas 28 times as potent as carbon dioxide at trapping heat—is emitted. While food is landfilled by the ton each day, thousands of people in Rhode Island simultaneously experience food insecurity.

528,168 TONS TOTAL MSW 100,030 TONS FOOD WASTE 60,577 TONS RESIDENTIAL FOOD WASTE 39,453 TONS INDUSTRIAL, COMMERCIAL, INSTITUTIONAL	Vegetative food waste 84,827 tons 8.1%	Treated wood 35,111 tons 3.4%	Compo pap 34,048 3.2	er tons	er yard debris tons 27,679 tons		Contam. bags/ films 20.883 tons 2.0%	
FOOD WASTE	Other (not classified)	Carpet/ padding 15,495 tons 1.5%	Mixed paper 11,084 tons 1.1%	Non- apparel 11,077 tons 1.1%	Other organics 9,595 tons 0.9%		s paper ons 8,934 tons	
	46,028 tons 4.4%	Protein food waste 15.203 tons	Uncoated paperboard 8,634 tons	Retail bags/film	Plastic #1-7 5,957 tons	Small scrap metal	Glossy Bulky paper plast. 4,731 4,724	
	Cardboard boxes	15,205 tons 1.5%		5,983 tons 0.6%			tons tons 0.5% 0.5%	
	41,244 tons 3.9%	Furniture	Newsprint 7,655 tons 0.7%	PET 4,714 ton: 0.4%				
			Dimensional lumber	Drywall 4,199 ton: 0.4%	s cla		e material	
	Bulky waste	Composite						
	37,394 tons 3.6%	plastic 12,696 tons 1.2%	All other C&D 6,695 tons 0.6%	0.4% Large scra metal 3,600 ton				







NO TREND



2025 Municipal Fact Sheets Update

- Updated data for 2025!
- Secondary data from government, nonprofits
- NEW metrics: urban farms; dollar value of schools purchasing local food

QUESTIONS?





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