



NEEDS & OPPORTUNITIES for Collaboration within New Hampshire's Local Food Distribution Network



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AUTHORS

France Hahn of Kearsarge Food Hub

Lauren Howard of Kearsarge Food Hub

Hanna Flanders of Kearsarge Food Hub

Leon C. Malan of Colby-Sawyer College

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REPORT DESIGN

Alicia Bergeron

PHOTOGRAPHY

Kearsarge Food Hub

FOR MORE INFORMATION

info.kearsargefoodhub@gmail.com

INTRODUCTION



The Kearsarge Food Hub (KFH) is a nonprofit organization that emerged to help strengthen the local food system within the Kearsarge Area Foodshed (KAFS). Since its inception in the spring of 2015, KFH has been working to bridge the gap between farmers and eaters in this region—specifically within a 30-mile radius—focusing on building the necessary infrastructure and systems that can bring greater food security to all members of the community while supporting farmers and sustainable farming practices. These efforts have been focused mostly on the development of the organization’s own programs, including: growing seasonal produce with regenerative farming methods on Sweet Beet Farm, aggregating and selling foods of all kinds from dozens of local farmers and food producers through Sweet Beet Market, baking and exploring food preservation and waste diversion in Sweet Beet Kitchen, and offering educational programming to local schools and the community at large.

In September of 2017, the KFH team received a USDA Local Food Promotion Program (LFPP) planning

grant to explore possibilities for amplifying distribution of local foods to work toward more fully aligning the supply and demand in the KAFS, specifically by looking at what it would take to open and increase access to currently underdeveloped wholesale markets like institutions and restaurants.

Building on Prior Research

The focus of this project was motivated, in part, by research conducted in two relevant feasibility studies: 1.) [The NH Farm to Institution Food Hub Viability Project](#) (NHFI), a Hillsborough County Local Food Initiative, and 2.) The Lakes Region Agricultural Collaborative’s [“Assessment of Potential to Develop Institutional and Commercial Markets for Belknap County Farmers”](#) (LRAC). The geographical range of these studies overlaps with those considered in this project, specifically Belknap and Hillsborough counties as they are included in the 30-mile radius target area of this project. In brief, the studies demonstrated an interesting set of data points that directly relate to the purpose of this grant, namely:

- ❑ Institutions in this area are using creative ways to source locally and are interested in procuring more local food, demonstrating a willingness to spend at the higher end of the purchasing range to do so.
- ❑ Farmers report excess product and an interest in growing more, while also reporting a decline in viability of the current direct-to-consumer markets available to them (namely, Farmers Markets and CSAs)
- ❑ There are significant barriers to farmers seeking to enter wholesale, institutional markets, including standards of practice, traceability (e.g. FSMA requirements), and lofty and unclear insurance requirements, as well as a lack of distribution, marketing, and promotional infrastructure.
- ❑ Most farmers are aware of the potential for a food hub to address their concerns and needs, while still about half of farmers are unclear or unconvinced about the potential of a food hub to help address all of these challenges relating to infrastructure, distribution, and technical and business assistance.

The Kearsarge Area Foodshed

FARM PARTNERS OF TOP 10 REGIONAL FOOD HUBS IN NEW ENGLAND

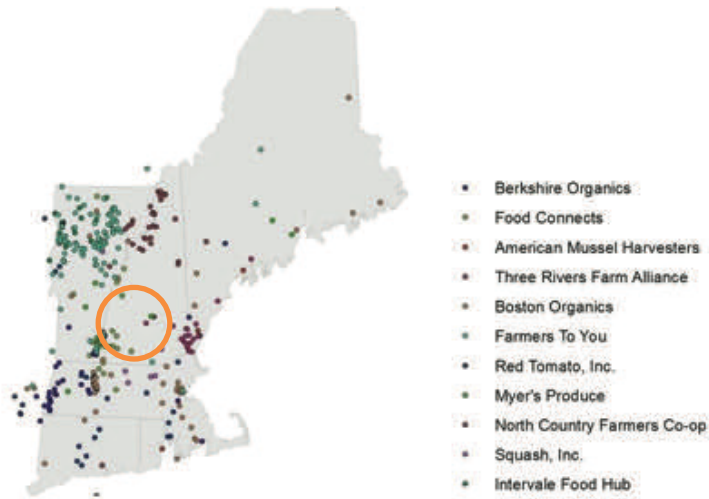


FIGURE A. NE REGIONAL FOOD HUBS AND THE KEARSARGE AREA FOODSHED
Source: Colby-Sawyer College ENV301 students of 2017

Regional food hubs have arisen to coordinate farmers and supply buyers of various types, including otherwise underserved wholesale markets. This model is gaining momentum in New England, and it is evident from the map in Figure A that distribution is well-established in states like Vermont and Massachusetts, but New Hampshire is falling behind. This gap in distribution by food hubs indicates that there is unmet potential to create channels within New Hampshire—and, specifically, in the Kearsarge Area Foodshed—to move food from farm to buyer in organized and impactful ways. (see Figure A)

These findings are further corroborated by anecdotal evidence gathered from the five years of experience KFH has had working with dozens of farmers and producers within its 30-mile service area (KAFS). Although the specific challenges may vary depending on the type of farm or production—being vegetable, dairy, meat, or diversified farms—the big picture is that farmers represent a struggling workforce. Particular challenges include: an aging population where the average age of a farmer is upwards of 60 years old, too few new and beginning farmers to takeover, difficulties with passing farms on to the next generation, farmers stretched thin spending too much time on marketing and distribution, and growing more food than they can sell at the price that they need to get. Financial resources and support systems are lacking to address these challenges.

The demand for local food is on the rise, but traditional direct-to-consumer markets, like Farmers' Markets and CSAs, while having a host of community benefits, are failing for customers in their lack of consistency and convenience, and are failing for farmers in their lack of reliable sales or opportunities for growth. Channels bringing local food into institutions are nonexistent or insufficient.

The lack of distribution through food hubs in this area is not necessarily a consequence of a lack of farms and local food production. As we will detail in this report, there is a high volume of small to medium sized farms in the KAFS, which includes 6 NH counties and 2 VT counties, with an average of 546 farms per county. However, this supply is not evenly distributed. Naturally, geography plays a fundamental part in determining where concentrations of production or procurement may be. Production, being more dense along the fertile river valleys on the eastern and western peripheries of the KAFS and procurement being more concentrated in the population centers of large towns and small cities, which are characterized by a greater density of institutions and commercial areas.

This area is home to many current and potential local food buyers, including institutions like universities and hospitals, a wide range of restaurants, as well as a handful of retailers and food processors.

Since farm sizes are small, there is a need to combine yields to produce the high volumes necessary to reach wholesale markets like institutions and restaurants. In addition to volume needs, things like delivery consistency and packing standards become barriers without central organization and leadership in those areas. Currently, no such entity, or entities, exist to the extent that is needed to align this region's local food supply with the area's wholesale and institutional demand for it.

According to the data collected in this project, Food Hubs constitute only 5% of the current market share of local farmers. This demonstrates high potential for growth in this area. Different kinds of food hub operations can address several key needs. This includes both transactional operations that help to physically move food from farm to market, and support networks that provide the necessary resources and opportunities for collaboration to stakeholders all along the food value chain.

Objectives

To help verify claims from previous research and anecdotal experience, and to gain a deeper understanding of the challenges and opportunities for more local food distribution statewide and within the Kearsarge Area Foodshed specifically, the KFH research team set out to explore two primary objectives:

KEARSARGE AREA VALUE CHAIN ASSESSMENT

The goal of this objective was to take an in-depth look at the Kearsarge Area Foodshed through developing surveys and questions, and conducting interviews and on-site visits with both farmers and wholesale buyers.

DEVELOPING A COLLABORATIVE STATEWIDE FOCUS GROUP AND RESULTING ACTION PLAN

This objective takes a broader look at the distribution of local food throughout the state (and beyond) by connecting with five food hubs across New Hampshire.

These objectives function as a starting off point and a roadmap for intensive research and relationship building within the KAFS specifically, the state of New Hampshire more broadly, and within the context of the New England region as a whole. There was originally a third objective, namely to develop a business plan for wholesale distribution in the KAFS, however the research team concluded that rather than duplicating efforts by developing another distribution-type food hub, the Kearsarge Food Hub would fulfill other roles while supporting and assisting the expansion of existing distribution hubs. More about this in the report's recommendations.

Recommendations

From working in the three objectives of this report, this research led to the development of four recommendations that help communicate the key findings of this research and set the stage for continued work in this area. They are:

1. Facilitate the expansion of existing distribution food hubs to increase local food purchasing in the Kearsarge Area Foodshed (KAFS).
2. Develop the Kearsarge Food Hub as a Farmer Support Network coordinator for the KAFS.
3. Establish a statewide food hub network to support New Hampshire's food value chain by building trust, creating a shared vision, and coordinating efforts. (Later we will look beyond our borders to integrate with the New England Food Hub Network facilitated by FINE.)
4. Create strategic marketing plans to communicate the source, story and value of local food that can educate the community and develop demand.



KEARSARGE AREA VALUE CHAIN ASSESSMENT



Introduction

In order to identify specific needs and opportunities within the Kearsarge Area Foodshed (KAFS), the research team conducted a Kearsarge Area Value Chain Assessment. The research was led by representatives of the Kearsarge Food Hub, with assistance from the Colby-Sawyer College Community Based Research team under the direction of Dr. Leon C. Malan.

In this market analysis, the team gathered data from **25 farms, 6 institutions, and 15 restaurants and food aggregators**, which includes local grocers and small-scale food processors. The approach taken to conduct this assessment, specifically through surveys, in-person interviews, and on-site visits, was geared toward not only gathering the data needed to more completely understand the capacity for wholesale distribution in this area, but also toward KFH actively building and deepening relationships with all stakeholders within the KAFS.

Methods

The first step in determining the needs and opportunities in this region was to identify producers and buyers.

The process started by compiling lists of producers, specifically farmers, and key buyers, specifically institutions and restaurants and food aggregators. The research team surveyed the geographical area using sources like the New Hampshire Department of Agriculture Marketing and Food ([NHDAME](#)) directories, County Conservation Districts, Google maps search, in addition to KFH's existing partners (past and present vendors and customers) in order to identify prospective participants of the study.

The research team then developed specific objectives within each group, which would offer deeper insights into the needs and opportunities within the food value chain on the whole. The specific objectives included:

Producers: How much of what is produced by whom and what is the farm's potential for growth and opportunity for development of wholesale accounts?

Institutions: How much of what is purchased by whom and what are each institution's specific incentives and obstacles to sourcing more food locally/regionally?

Restaurants & Retailers: How much of what is purchased by whom and what are each restaurant's specific incentives and obstacles to sourcing more food locally/regionally?

After determining exactly what information ought to be captured, the research team began drafting interview and survey questions for each of the groups. An online survey software (Qualtrics) was used to distribute the surveys and collect data electronically.

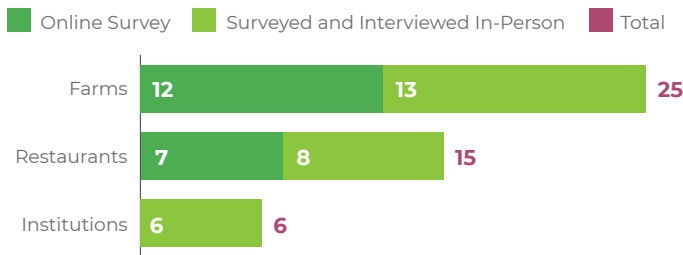


FIGURE B. INTERVIEWS AND SURVEYS DATA COLLECTED

The team contacted as many farms, restaurants, and institutions as it could, arranged for site visits and personal interviews, and distributed the online survey instrument to capture the data required. All interviews were transcribed and data was captured on spreadsheets. A group of students at Colby-Sawyer College in New London, NH under direction of Dr. Leon C. Malan assisted KFH in data collection and used spatial analysis to demonstrate location and characteristics of producers and buyers identified in this area.

The data collected represents a reasonable sample size to represent the supply and demand within the KAFS. (see Figure B)

The process of holding face-to-face interviews with producers and buyers was invaluable for building on relationships and forging new connections with the players in the food value chain. There were, however, some challenges posed by the methods used to collect this data, including:

- ❑ The length of the survey was prohibitive to a high rate of responses.
- ❑ The survey questions were too detailed and complex, and many respondents had difficulty answering the questions.
- ❑ Production figures from producers, such as complete harvest and sales records to demonstrate how much of each crop is produced or sold, proved to be surprisingly challenging to collect.
- ❑ Many farmers, specifically the smaller scale farms, don't have this kind of data readily available, or else have little incentive to share it.
- ❑ The inconsistency/non-standardization of units used by producers and buyers to describe quantities of product made it difficult to match production with buyer demand (e.g. farmers

use acreage to talk about production quantities, and buyers often use case sizes.)

Overall, it was difficult to get comprehensive data and the research team had to make some educated guesses to gather a rough picture of the supply. **The key recommendations for improving this methodology would be to:**

- ❑ Interview a few key farmers and use the information to develop survey/ interview questions
- ❑ Collect very basic information from as many farms as possible. e.g. size of production (acreage, sales), types of products (% of fruit, veg, meat, eggs, dairy, other)
- ❑ Follow-up survey to collect more detailed information related specifically to working with a food hub to distribute farm products, (e.g. quantities produced, pricing, schedules)
- ❑ Allocate funds to compensate participants for their time and incentivise participation.



Results and Analysis

PRODUCERS

New Hampshire is characterized by mostly small farms. More than half of the farms in the state are less than 50 acres in size and 80% of farms in NH have less than 180 acres. (see Figure C)

According to data collected by the USDA, there are 4,366 farms totaling 485,466 acres within the eight counties that fall within the KAFS (USDA, 2008). There is an average of 546 farms per county, covering an average of 60,683 acres per county.

The research team took a sample of 25 farms within the 30-mile radius of the KAFS. This profile of farms is consistent with the picture in the rest of the state of New Hampshire, in terms of farm size and revenue. (see Figures D and E)

This initial assessment of farms was then followed by a survey to farmers collecting more specific and detailed information. Twenty-five farms completed the survey and the research team was able to visit and interview 13 of those farms. It was concluded that the sample of 25 farms was a reasonably accurate representation of farms in the 30-mile radius around Bradford.

A larger portion of the farms in the survey sample were of a size less than 10 acres (44% in the survey sample), but it was also observed that many of these farms had intensive growing practices that included high tunnels and that they demonstrate relatively high revenue per acre. (see Figure F)

Most of the farmers in the sample had more than 15 years of experiences (supporting the national trend of an aging farmer population, USDA 2019) and the majority of farms had revenues of \$100,000 or more. The total annual revenue of the 23 farms who responded to the revenue question (using the midpoint of revenue ranges) is \$6.4 million. (see Figure G) Farms in the survey provide employment for 163 people in the summer season and 148 people in the off-season.

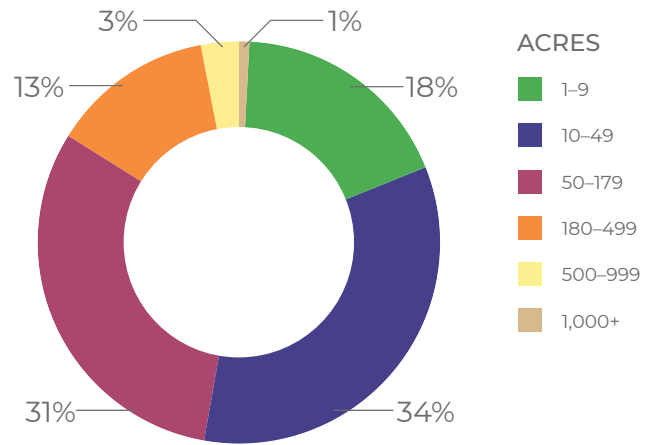


FIGURE C. FARM SIZE IN NEW HAMPSHIRE
Source: United States Department of Agriculture, 2012

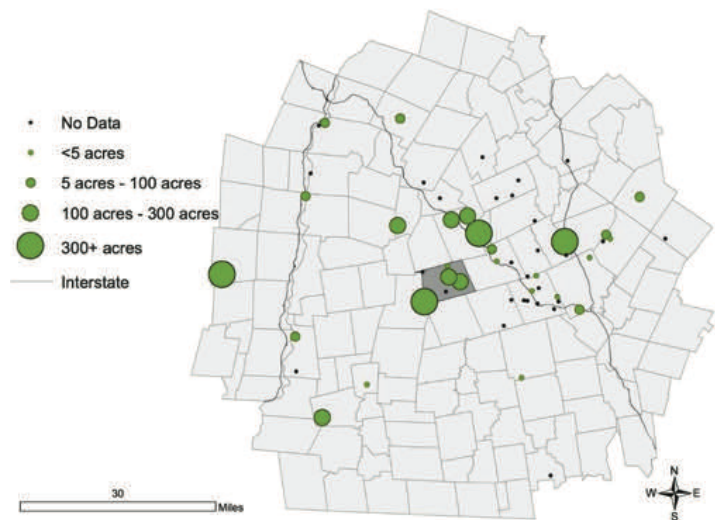


FIGURE D. ACREAGE OF 56 FARMS WITHIN 30 MILES OF BRADFORD
Source: Colby-Sawyer College ENV301 students of 2017

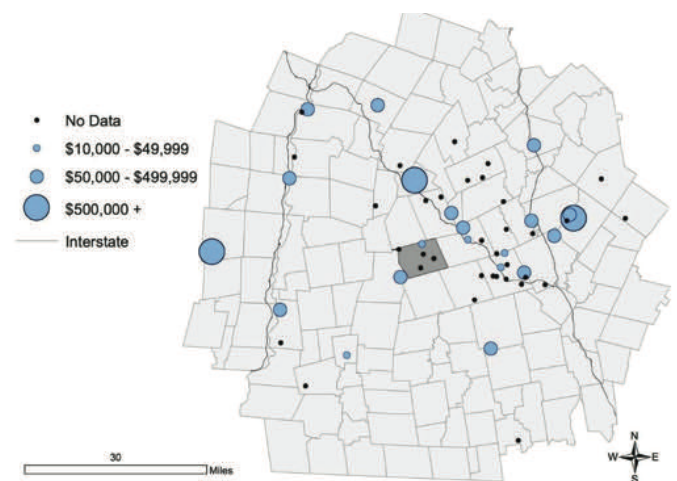


FIGURE E. REVENUE OF 56 FARMS WITHIN 30 MILES OF BRADFORD
Source: Colby-Sawyer College ENV301 students of 2017

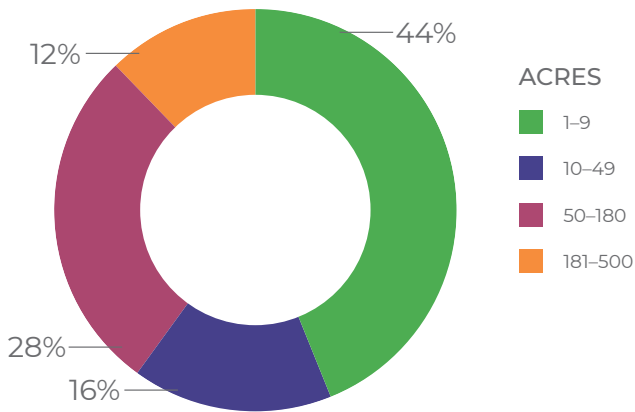


FIGURE F. FARM SIZE OF SURVEYED FARMS

Fourteen farms (56%) indicated that they were USDA Organic certified.

The farms participating in the survey were predominantly involved in vegetable production (76% of farms). The remainder were either mixed farms with both vegetables and livestock and only one dairy farm responded to the survey. This sample would be consistent with the New Hampshire farm profile where only 3.4% of farms in the state are involved in dairy production. Livestock and poultry farms were underrepresented in the sample. (USDA 2017 Census data)

Farmers were asked to indicate the channels they used to distribute their product. Based on the reported revenue and using the data provided by farms, the research team calculated the percentage of the revenue stream from different distribution channels.

The largest portion of revenue (46%) came from sales directly to grocery stores and coops and from sales to distributors. It is worth noticing that this amount consists largely of the sales from the largest farms in the region with revenues over \$500,000. In fact, only two farms contribute 71% of the total sales to grocery stores and distributors. The majority of farms in the sample used CSAs (Community Supported Agriculture), farmers markets and farm stands to market their product. (see Figure H)

This finding is significant to the primary purpose of this study. Only five farms in the survey used a food hub to distribute their produce. Only seven farms in the survey distributed their produce to institutions. A food hub in this 30-mile radius can assist in the aggregation and distribution of produce and it can also facilitate a larger volume of local food to the institutions in the region. The finding also suggests that restaurants are not a common distribution channel with only 3% of the total revenue coming from that source.

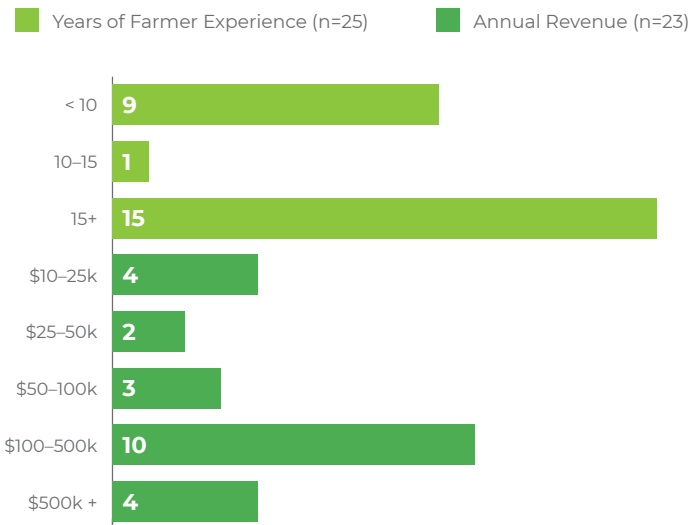


FIGURE G. FARMER EXPERIENCE AND ANNUAL REVENUE OF SURVEYED FARMS

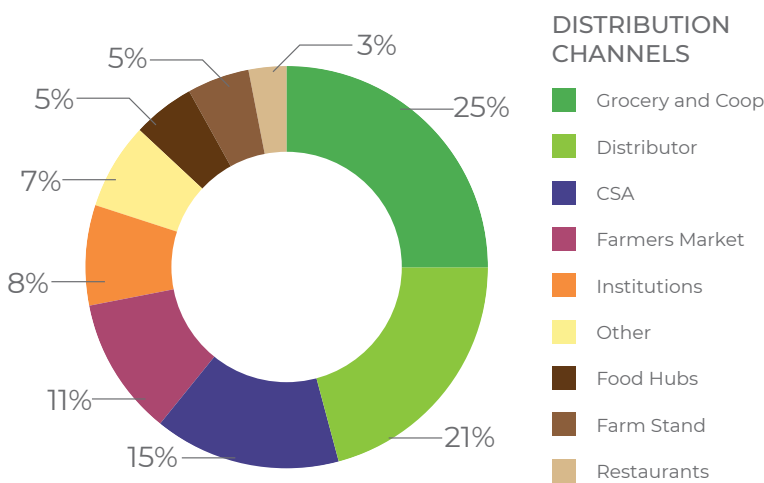


FIGURE H. VOLUME OF TOTAL FARM REVENUE IN THE SAMPLE DERIVED FROM DIFFERENT DISTRIBUTION CHANNELS

Transportation 79%
 Networking 71%
 Processing Facility 69%
 Farm Equipment Sharing 69%
 Marketing & Branding 67%

TOP 5 REPORTED NEEDS TO IMPROVE THE DISTRIBUTION OF PRODUCE

When asked about the assistance and support they need to improve distribution, the majority of respondents (79%) listed “Transportation” as a need. Other aspects that a majority of respondents identified as a need were a network of farmers, processing facility, farm equipment sharing, and assistance with marketing efforts.

The results of the question on participation in aspects of a food hub was encouraging—**88% of the respondents indicated that they would be willing to work with a food hub.**

All respondents answered that they knew what a food hub was and they offered a range of qualitative comments on what they perceived as the benefits of a food hub. There were some overlapping themes.

Farmers recognize the beneficial functions of a food hub to include:

- ▣ Coordinating the supply to reach more reliable markets
- ▣ Maintaining the story of the source and convey value to buyers and end-consumers
- ▣ Less marketing and distribution work for farmers frees up more time for fundamental farming activities
- ▣ Networking amongst farmers
- ▣ Contributing to public/community health via enabling a vibrant local food system

“Primarily economic (e.g. support of local economies) and as a public health matter (e.g. improved access to wholesome food).”

WHAT DO YOU PERCEIVE TO BE THE GREATEST BENEFIT OF WORKING WITH A FOOD HUB?

INSTITUTIONS

The research team collected information from six institutions in the KAFS’ 30-mile radius. Participants consisted of three colleges, one private high school, one hospital, and one retreat center. It was very valuable to interview each of these institutions in-person, which allowed the research team to develop a sense of current efforts toward local food procurement, the specific challenges and opportunities that each institution faces in increasing local food procurement, and also to develop more familiar relationships and stronger network connections.

Institutions in the area range widely from a large college with an enrollment of over 6,000 students, to smaller institutions with an annual budget of less than \$100,000. Combined, these institutions serve roughly 10,800 meals per day during the semester when students are on campus, and represent an annual food budget of over \$11 million. In the summer-time the number of meals per day offered by these institutions (with fewer students on their campuses) drops to 2,500. This seasonal drop in attendance highlights another significant challenge faced by food producers seeking to work with educational institutions. This seasonal asynchrony between institutional demand and food supply creates a fundamental challenge to educational institutions and the local vendors that seek to work with them.

“Community and support with a shared vision of a healthy local food system. More time available for farm production. More access to local products in the community.”

“More reliable sales. Greater volume. Convenient pick-up and aggregation.”

More than 95% of food purchases for institutions are made through national or regional distributors. When asked if they purchase local food, the research team received a wide range of definitions of the term “local.” In some cases, “local” was defined as within New Hampshire and in other cases it was defined as within a radius of 100 to 250 miles. Very little (less than 1%) of food purchased by the institutions surveyed come from within the 30-mile radius adhered to in this study.

Generally speaking, the primary challenge facing institutions is highly restricted budgets. In addition to the challenge of finding the appropriate volume for the large numbers of daily meals, the right price point is a major issue for food service managers. Very few of the institutions in this study could afford to include locally sourced protein products (beef, chicken or fish) in their purchasing options. Purchasing more locally sourced fresh vegetables was more attractive and feasible, as long as high volumes were available. This offers some potential for local farm produce.

Institutions from this study spend on average 20% of their annual food budget on fresh vegetables. If just 30% of that portion of the budget is spent in the local 30-mile radius, it would add approximately \$600,000 to KAFS farm revenues per year.

The decision-making process around sourcing varies greatly between participants, ranging from institutions subject to a corporate (multi-)national food service management company (FSMC) to decisions made on-site by chefs and managers. The former is characterized by central corporate management and, due to the size of the populations served and the corresponding risk associated, the food safety and insurance requirements are quite lofty and can pose significant barriers to many producers. The latter are typically more flexible and, therefore, more accessible to small-scale farms and producers. This may not prevent many institutions from sourcing regionally but it can impede an institution’s ability to work with producers truly local to them.

Most of the institutions interviewed were very open to the idea of purchasing more local food and indicated a willingness to work with a local food hub. Institutions represent a major opportunity for increasing local food sales and purchasing in the KAFS. Food hubs could provide services that may overcome the typical barriers to entry facing small farmers.

It should be noted that NH Farm To School (FTS) & NHFA’s farm-to-institution (FTI) action team developed a toolkit for institutional buyers to include local foods in their purchasing plans and policies. This resource is intended to help create access channels to institutional buyers for more local food vendors, and one section addresses the value of written policies. In line with this, the research team found that one of the institutions surveyed has in place a consumer-driven policy that sets a minimum requirement for local food procurement, which has pushed the FSMC to make special efforts to improve the institution’s access to more local foods.



RESTAURANTS & FOOD AGGREGATORS

The original proposal for this project defined two buyer categories, institutions and restaurants. However, through the process of this study, the research team found that there was an outlier class of buyers that did not fit in either. These include retail, value-added food processing, and meal kit businesses. The research team decided to integrate these local food aggregators into the restaurant category due to their greater similarity to restaurants than institutions.

New Hampshire is a popular seasonal tourist destination and, according to the National Restaurant Association, the state has 3,178 eating and drinking establishments with an approximate annual revenue of \$3 billion. (National Restaurant Association, 2019). Like most areas, restaurants in the KAFS are varied, ranging from low-volume/high-price to high-volume/low-price and everything in between. Since the region is a popular summer vacation location with several lakes in the area, demand fluctuates greatly throughout the year. The primary challenge faced by the research team was successfully scheduling interviews with owners, managers, and/or chefs, and also acquiring the desired quantitative information.

Figure I indicates the buyers surveyed and interviewed in this study. The research team collected data and interviewed a total of 15 restaurants and local food aggregators.

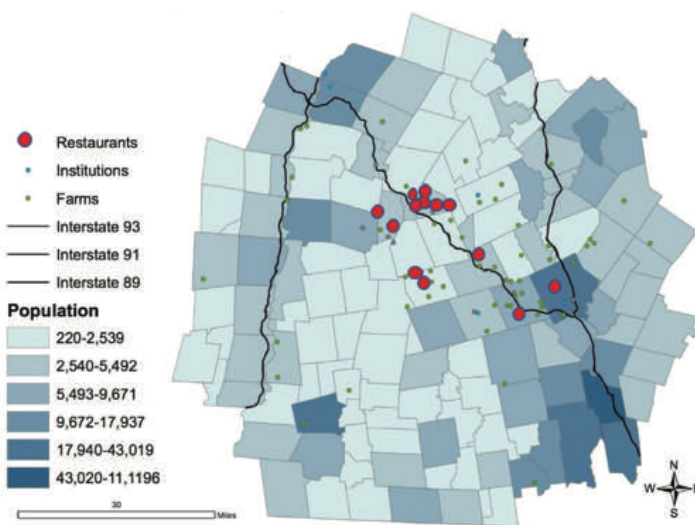


FIGURE I. RESTAURANTS AND FOOD AGGREGATORS IN THE SURVEY DATA

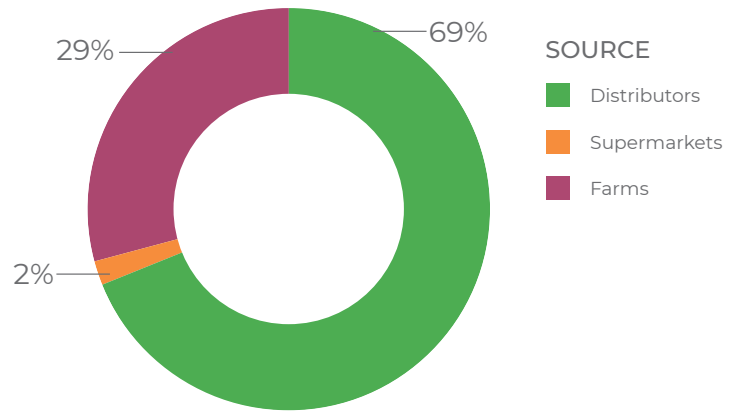


FIGURE J. TOTAL RESTAURANT FOOD BUDGET: \$5.4 MILLION

Annual food budgets ranged from \$80,000 to \$2.5 million and number of meals served per day ranged from 110 to 500 meals in the busy season. The buyers in our sample represented a total food budget of \$5.4 million.

From interviews with owners and chefs, it became evident that restaurants source their fresh produce mostly from national and regional food distributors, as opposed to more local food distributors.

Based on the available information in the surveys, almost 70% of the food budget of restaurants is spent on produce sourced from national and regional distributors. (see Figure J)

However, 62% of respondents answered positively to the statement: "I would love to replace more of our food with local produce" and 75% answered positively to the question: "Are you interested in working with a food hub?"

According to the interviews and the experience of KFH, chefs and restaurant owners are generally very interested in using local food but are in need of an easy, convenient, and reliable ordering and delivery system. Working directly with individual farmers does not typically satisfy all of these needs. A food hub, however, could offer a similar ordering system to what chefs and restaurant owners are used to, with a reliable supply and regular delivery schedule. The price point of local food would continue to be the largest obstacle for most restaurants. A food hub could offer sales and marketing assistance to highlight the value of local products and advocate the benefits that come at a higher price point.

FOOD AGGREGATORS

The establishment of two retail stores in this 30-mile radius that focus on aggregating produce from local farms, food producers, and makers is an important development. These stores are open five days a week and allow smaller farmers to get their products to end-consumers, making it more convenient for them to purchase local goods on a regular basis than farmers' markets or CSAs might afford. These two stores, plus the food processors interviewed in this study represent a combined local food purchasing power of at least \$400,000 annually.

Other buyers of local food include food pantries and supplemental food programs (e.g. fruit and vegetable prescription programs) in the area. Based on the data collected, these buyers add at least another \$7,500 of revenue to local producers. While this constitutes only a small percentage of total local food purchasing in the KAFS, their existence demonstrates the diversity of current and potential buyers. While food pantries and other public health initiatives tend to depend on uncertain funding, such as donations and grants, they represent a valuable opportunity to benefit both producers and members of the community by increasing access to local foods for the underserved.

Conclusion

One primary aim of this research was to test the assumption that further coordination of the local food supply by a food hub is needed and desired to satisfy underdeveloped wholesale markets. The majority of producers and buyers alike are interested in working with a food hub; 88% of farmers,

100% of institutions, and 75% of restaurants all indicated a willingness to expand collaboration through working with a food hub.

It is understood that the various functions of a food hub and the interplay between associated networks, both transactional and support-based, can help to address the needs for players on both sides of the equation.

The results of this research show that there is a relatively strong supply of agricultural products within the 30-mile radius around Bradford, yet distribution of produce is quite fragmented with many farms self-distributing to wholesale buyers. Producers are characterized by a few larger producers but dominated by small diversified farms of a size less than 10 acres, with the majority of farms in the \$100,000 to \$500,000 revenue range.

Although it was challenging to get specific numbers from farms in this research, the majority of farm revenue is derived from direct sales (mostly for the small and medium sized farms in our sample) and retail and distributors (the larger farms in the sample).

Sales to institutions represent only 8%. Yet, the six institutions included in the study purchase \$11 million worth of produce every year, almost twice the amount of local farm revenues. This suggests that institutional markets represent an area with great potential to increase local food distribution and should therefore be a high priority for food hubs.

To take into account the real barriers that exist between farm and institution, some of the immediate

PRODUCER NEEDS BUYER NEEDS

(as identified in this study)

Transportation	Volume
Farmer's Network & Support	Price Sensitivity
Processing Facility	Reliable & Consistent
Equipment Sharing & Planning	Customer & Sales Service
Marketing & Advertising	Conveying Source & Value to End-user

**88% OF FARMERS,
100% OF INSTITUTIONS,
& 75% OF RESTAURANTS**
in this survey all indicated
a willingness to expand
collaboration through
working with a food hub.

opportunities to market more local food to institutions include:

- ▣ Focusing on building channels to the smaller institutions with lower volume demands first and expand from there.
- ▣ Supplying produce in the summer months when the demand at the schools is lower and when local farmers have more produce to offer.
- ▣ Beginning with smaller operations within the institutions (for example, a separate cafeteria)

Similarly, there is also great potential to increase the amount of local food sold to restaurants. At the moment, only farms with the largest volume of production are consistently supplying restaurants, representing just 3% of sales. Typically, volume is lower in restaurants than in most institutions and chefs are better able to convey the story and therefore the value of local produce to their customers. This makes restaurants an especially fitting customer for smaller producers seeking entry to wholesale markets.

Total farm revenue from 23 out of the 25 farms is \$6.4 million. Institutional purchasing is at \$11 million, while restaurant purchasing is at \$5.4 million. (see Figure K)

The methodology of this study and the data that has emerged from it revealed insights regarding the importance of relationship building.

A network's operational capacity is founded on its relationships. **In order to establish a functional, impactful, and equitable network to support statewide partnerships, one must first attend to the relationships and build trust between participating entities.** An immense opportunity exists in developing healthy cooperation through relationship-building between key stakeholders across the KAFS food value chain. This is equally true for horizontal relationships, such as farmer-to-farmer, food-hub-to-food hub, and institution-to-institution, as well as vertical collaboration between different levels of the food value chain.

Efforts to develop a culture of relationship-building can take on many forms, such as: incentivizing participation, ensuring equity across value chain segments, rewarding transparency and commu-

REVENUE FLOW IN THE KAFS (IN MILLIONS)

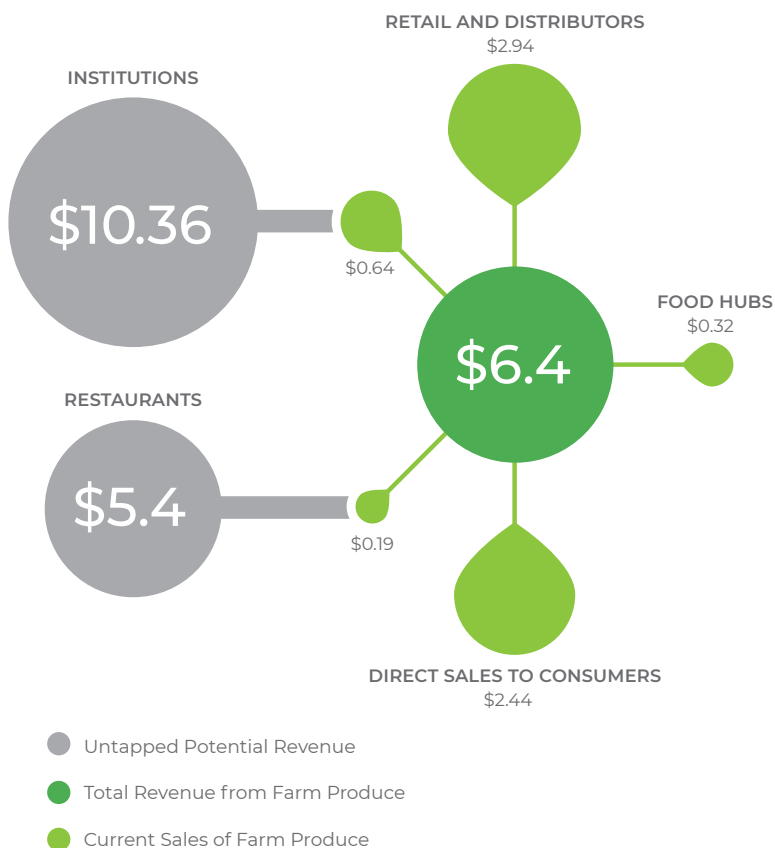


FIGURE K. REVENUE FLOWS IN THE KEARSARGE AREA SUPPLY CHAIN
Total farm revenue from 23 out of the 25 farms is \$6.4 million. Institutional purchasing is at \$11 million, while restaurant purchasing is at \$5.4 million.

nication, and creating value beyond the sale and procurement of goods, based on a mutually beneficial vision for the area's local food system. Of course, there is also ample opportunity for all key stakeholders to work together to directly increase sales or decrease inefficiencies. For example, distribution food hubs and farmers who self-distribute should be seeking to explore cross-docking and backhauling opportunities with each other wherever possible. Online platforms that are specifically designed to facilitate these services and coordinate food hubs across a network afford a uniquely effective means for collaboration and should be sought out by food hubs aligned to capitalize on the economies of collaboration. Examples of these online platforms include [Farm Fare](#) and [Local Food Marketplace](#).

Based on both this quantitative and qualitative data, the research team concluded that further coordination of the local supply is in fact desirable and necessary to satisfy new wholesale markets. This process has been a critical step toward developing the channels, networks, and systems that make it happen.

Because the needs of both producers and buyers are so diverse, the research team concluded that solutions based in collaboration must be multifaceted, and should include the following:

1. Distribution-type food hubs
2. Farmer support network
3. Statewide food hub network
4. Strategic marketing plan

These solutions will be further discussed in the Recommendations section.



COLLABORATIVE STATEWIDE FOCUS GROUP & RESULTING ACTION PLAN

Introduction

In order to identify specific needs and opportunities within New Hampshire's local food distribution network, the research team conducted in-person site visits and interviews to five neighboring food hubs. The purpose of these visits was to meet with hub operators to gain an understanding of each food hub's model, base of operations, and to build working relationships with each of them. Next, the research team conducted focus group meetings, which included these food hubs and other key local food players, to determine areas of collaboration and establish the foundation for a statewide food hub network.

Methods

Phase 1: In-person Site Visits & Interviews to 5 Neighboring Food Hubs

The interview questionnaires were developed by the research team, with the help of Colby-Sawyer College. The questions sought to capture more qualitative and anecdotal information than quantitative data. They addressed each hub's origin and history, structure, annual revenue, relative sales channels, size and type of vendors and products, logistics management (schedules and routes), physical and digital infrastructure, plans for expansion, and current needs and opportunities.

Some notable challenges faced in creating and using the food hub questionnaires were:

- Structural differences of each food hub made it hard to come up with a good survey that could capture specific data and paint an accurate picture of each business. This mostly applies to the "hub-like" businesses that are not a straightforward aggregation/distribution-type hub
- Changes in management throughout the project period made sustained contact difficult to attain once the primary contact was lost
- One of the hubs has recently gone out-of-business

Successes:

- The nature of the interview questionnaires and the process of visiting each location and sitting down face-to-face with each manager opened many unforeseen channels of inquiry and connection that otherwise would not have been possible
- The research team used the questionnaires to steer the conversation and ensure that critical points of information were addressed but allowed for the conversation to evolve naturally. For example, we were able to discuss the perceived threats, such as competition between food hubs, hubs and conventional distributors, and between participating farms, etc.
- The food hubs were able to give solid data that was lacking in some of the other types of contacts





The food hubs that participated in this study showcase the variety of possible food hub models within the local food system. Each organization took a different shape according to its start-up resources, target market segment, geography, agricultural landscape, and motivations.

The hubs interviewed in this study included both wholesale- and retail- types as well as a couple of hybrid models who run CSAs or retail stores and also sell to wholesale customers. The hubs also differed in legal structure. The sample included both non-profit and for-profit organizations, two of which are organized as farmer cooperatives. Collectively, the hub sample contained representatives of each major region of the state, and their service areas span the majority of the state, with certain vacancies between population centers.

Through this process the research team learned that existing distribution-type hubs were already considering moving into the KAFS. Given this information, the research team opted to deviate from the initial intent to develop a business plan for local food distribution to be enacted by KFH and instead recruited an existing hub to develop an expansion plan that would involve distribution to the KAFS. The central goal and basis of this part of the project was to establish a means of local food distribution to the KAFS, not that KFH become a distributor. Therefore, this shift suited the overall objective of the project and the change was made.

By implementing this shift, KFH avoided duplicating current efforts, which may have led to unnecessary competition and heavy investments in physical infrastructure. Instead and as a result, KFH has fostered an environment of increased cooperation, and facilitated the expansion of a distribution-type food hub into the KAFS.

Phase 2: Conduct Focus Group Meetings

After the visits and interviews were completed, the research team began to work on scheduling meetings, both virtual and in-person, with representatives from each of the five food hubs and other key local food players. This task proved difficult because of conflicting schedules and there was little obvious incentive for them to participate. While food hub representatives generally seemed to like the idea of communicating and collaborating with each other, they all seemed hesitant to engage in discussion without guaranteed benefits.

It's true that specific outcomes could not be guaranteed, but the idea of a Community of Practice (CoP) emerged as the key goal for these meetings. A CoP is a group of people connected by a shared interest, concern, or passion, whose collective purpose is to learn from each other, build intellectual and social capital, and develop solutions toward common goals. Developing this kind of connection first begins by coming to the table, which was the purpose of these focus group meetings.

With the assistance of Allgood Eats Local and the New Hampshire Food Alliance (NHFA), part of the University of New Hampshire's Sustainability Institute, the research team held four meetings with food hub network participants—one in-person meeting and three teleconferences. The agendas were devised loosely to allow flexibility in discussion and allow the hub managers to direct the group's efforts according to the needs and interests of each.

The research team, comprised of representatives of KFH decided it would be best to opt out of the facilitation role for these conversations and instead function as a participant. Given the experience of our partners at NHFA, which operates as a statewide network focused on improving food security in the



state of NH, they were considered to be in the best position to facilitate these discussions.

In hopes that these initial meetings would spur an ongoing network beyond the lifetime of the grant project, the research team concluded that it would be most beneficial to have a thread of continuity throughout its development.

MEETING 1

The first teleconference took place in April 2018 and had rather low attendance (6 of 17 invitees); but it was still effective in initiating networking efforts. Participants included representatives from 2 food hubs and 3 support organizations.

The leading questions for the first call were:

- ❑ What would a New Hampshire Food Hub Community of Practice look like?
- ❑ How would it function?
- ❑ What would be most useful?
- ❑ Who should be involved?
- ❑ Who will facilitate/coordinate?
- ❑ How can the NH Food Alliance best support this group?

The topics covered include:

- ❑ Examples of food hub networks in other regions of the country
- ❑ Examples & Recommendations from experience with the VT food hub network
- ❑ Examples & Recommendations from experience with the New England food hub network
- ❑ Models/Opportunities for collaboration
 - Shared ordering platform for transactional network, e.g. farm fare, local food marketplace

The major takeaways/recommendations were:

- ❑ It pays to compensate participants for their time, (e.g. VT Network paid \$100 to each participant when beginning)
- ❑ Good to start with regular meetings as a community of practice (CoP) but the main goal would be to have this CoP grow into something more substantive like a statewide food hub network with specific arrangements to cooperate and meet the demand.
- ❑ Regular meetings is the best place to start, in order to establish personal relationships between organizations and individuals
- ❑ Transactional networks require basis of trust and mutual interest to function well
 - Important to overcome perception of competition
- ❑ Informal networking environments work better than formal settings to establish beneficial relationships

MEETING 2

The second meeting was held in December 2018. A total of 9 representatives (of 17 invitees) participated in the second teleconference. Participants included representatives from 4 food hubs and 3 community support organizations with specific interest in supporting small farms.

Topics covered include:

- ❑ Reviewing the ideal outcomes of the calls
- ❑ Interests, activities, and concerns of each participant organization/representative

The major outcomes/takeaways were:

- ❑ There is agreement that establishing regular connection with NH food hub workers (aggregation, storage, processing, distribution) would be useful, while simultaneously working to connect with the larger region of New England.
- ❑ Using the NHFA Statewide Gathering as a venue to connect the NH food hub CoP would be useful.
- ❑ Having time at the FINE summit in April to connect with food hub workers from around the region would be useful.
- ❑ This informal group is lacking a facilitator!
 - NH Food Alliance seems like a good support network but they lack personnel, resources, funding, etc...
 - Food Hub managers lack the TIME to manage inter-hub relationships
- ❑ The group should apply for funding to make it easier/possible for this CoP to establish itself into a NH statewide food hub network and build relationships and trust.
- ❑ Insight from the VT CoP:
 - VT food hub network has evolved to the point where there is a backbone organization that has submitted grants on behalf of the network. A consulting team is going to be looking at where are the markets, facilities, where would be an ideal space for cross docking
- ❑ Shared branding for NH re: local food could be very beneficial, as it has been for VT

MEETING 3

The third meeting was conducted in-person at the NH Food Alliance's annual statewide gathering in March 2019. The premise of the breakout session is described as follows:

“Developing a Statewide Food Hub Network & Community of Practice”

Description: The aim of this breakout session is to continue the market development work of creating a food hub network and Community of Practice (CoP) for the state. Participants will share best practices and challenges, and establish a timeline of activities for the year (e.g., schedule for regular phone calls and in-person meetings, how best to collaborate with other food hubs in the New England region, and determine any initiatives or projects

to pursue as a CoP). This session is geared toward farmers and food processors; those involved in food aggregation, distribution, and storage; as well as those who provide related technical assistance.

Participants were varied, stretching across the whole of the food value chain—including institutional buyers, food hub operators, commercial kitchen managers, food banks, farmers and food producers, community support organizations, lenders, as well as regular community members simply interested in the matter. The meeting was facilitated by Vital Communities and Food Connects.

Most importantly, managers from each of the participating food hubs were together for the first time since the project began.



Due to the high attendance, the group was split into two: one group was comprised of food hub operators only, the rest of the participants were in the other. The other participants were numerous, so were further split up by table. After closed conversations within each group, all groups came together to share takeaway points from their discussions. There was much overlap between the food hub group and the other groups, regarding identifiable needs and opportunities for increasing local food sales and procurement throughout the state, and the role that hubs might play in that effort.

The intention behind separating the food hub operators from the rest of the group was to use this opportunity to help them find common ground, specifically through talking about their experiences, plans and desires, needs and opportunities, challenges and impediments.

The food hubs created a list of assets that could be shared between them:

- ❑ Connections with buyers
- ❑ Connections with farmers and producers
- ❑ Software/digital infrastructure (for managing logistics and ordering)
- ❑ Storage facilities/aggregation points (or, “sub hubs”) for cross-docking
- ❑ Trucks
- ❑ Funders and advocates

The primary outcomes sought by the facilitators were simply recommendations for a successful path forward for the burgeoning food hub network, informed by food hub operators as well as other players in the local food landscape. The exchange of ideas and experiences that ensued helped each hub to better understand the other’s operations and to begin to forge relationships that would extend beyond the session. And so, the network’s relationship building had begun.

Following this meeting, the research team and representatives of the NHFA wrote a project proposal to develop a NH Food Hub Network and submitted letters of intent to two federal grant programs.

MEETING 4

The fourth meeting took place via Zoom in April 2019. This conversation was a follow-up to the NHFA in-person meeting. Attendance was minimal this time around, as the growing season was beginning for farmers and food distributors. This conversation focused on structure and execution of the meetings, and securing resources to support the continuance of this Community of Practice. Given the limited participation of key contacts, the group that did convene mostly discussed issues related to a lack of attendance and identified ways of incentivizing involvement.



Needs & Opportunities

Overall, this part of the project presented many challenges, because participants wanted to have clear benefits and outcomes before making the time to meet. However, of course, the very purpose of meeting was to determine those benefits. The main challenges were as follows:

- Low attendance
- Difficulty securing a well-connected and experienced facilitator that would successfully leverage participation for the purposes of the grant project and beyond
- Lack of familiarity/personal relationship/rapport between target participants made it difficult to muster consistent attendance
- Benefits of participation were unclear
- No financial incentive to participate
- The initiatives of the focus group were not specific enough to generate sustained interest amid the everyday obligations of organization leaders
- Distance between hubs made it particularly challenging to meet in-person

The primary need and opportunity identified as a result of the actions taken in this objective is the creation of a statewide food hub network to support New Hampshire's food value chain, the third recommendation made in this report. This recommendation goes hand in hand with conclusions from the FINE Food Hub report, which finds that before food hubs can think of combining resources, there is a need to have a support network. One reason for this is that food hub managers lack the time and incentive to manage inter-hub relationships. The NH Food Alliance could potentially fulfill this role, as it is already positioned as a central and connective organization for the state of NH. Resources like funding and personnel are central to enabling the NH Food Alliance, or some other actor, in stepping into this role.

As such, the research team made it a priority to secure funds to continue the important work of laying the foundation for such a network to evolve beyond the scope of this report. Not only was the new project approved for funding through USDA's Specialty Crop Block Grant, but there was also buy-in from each of the participating food hubs in the form of a letter of commitment. Furthermore, the New Hampshire Food Alliance has committed to playing a central role in the management of the project.

The most notable suggestions were:

- To clarify the goals and outline of the conversation, greater advocacy of the importance/value of the meetings (i.e. why they should make time to participate)
- Allow greater notice of meeting, so prospective participants can better plan for it
- Expansion of prospective participants to include representatives from all sectors of the food value chain (e.g. production, distribution, processing, marketing (retail, direct), institutional buyers, end-consumers) because each sector functions to serve the next.
- Incentivize involvement of entities with the greatest vested interest in developing a strong and robust food hub network in NH

Pursuant to this goal of attaining greater participation, better structure, and more effective execution, the group determined that securing funding to support the further development of the network was requisite in order to move forward in a productive manner. Therefore, the research team and representatives of the NHFA decided to shift focus from convening meetings to writing grant proposals for projects that would fund a more concerted effort along this vein. There was a general agreement among organizers that it would be best to wait for funding to come through to continue the CoP/Network meetings initiated by this grant project.



RECOMMENDATIONS

The research team has developed four recommendations for aligning local food supply and consumer demand within the Kearsarge Area Foodshed and across the state of New Hampshire. These recommendations are not mutually exclusive; collectively, they would have a great impact on the area's capacity for producing, coordinating, and distributing more local foods. Individually, each recommendation would still have a positive impact on the food value chain.

1

Facilitate the expansion of existing distribution-type food hubs to increase local food purchasing in the Kearsarge Area Foodshed (KAFS).

Develop the Kearsarge Food Hub as a Farmer Support Network coordinator for the KAFS.

2

3

Establish a statewide food hub network to support New Hampshire's food value chain by building trust, creating a shared vision, and coordinating efforts.

Create strategic marketing plans to communicate the source, story and value of local food that can educate the community and develop demand.

4



FACILITATE THE EXPANSION of existing distribution-type food hubs to increase local food purchasing in the Kearsarge Area Foodshed (KAFS).

Description

Distribution-type Food Hubs are those that aggregate and distribute local goods. The information from this report, alongside existing research, demonstrates the need and opportunity for the operation of this type of food hub in the KAFS.

Why & How

Food hubs with distribution capacity are critical to addressing the needs of both producers and buyers within a changing food value chain. These food hubs can provide the infrastructure and services to physically connect producers and prospective buyers.

For the KAFS, the research team concluded that rather than duplicating efforts by developing another distribution-type food hub, the Kearsarge Food Hub would fulfill other roles (see Recommendation 2) while supporting and assisting the expansion of existing distribution hubs and their transactional networks to ramp up local food purchasing in this area.

Investments

Expansion plan for an existing food hub and associated costs for bringing in the personnel and infrastructure to the KAFS. Costs to be determined as planning continues.

Stakeholders

- South-central Transactional Networks
- Distribution Food Hubs
- KAFS Farmers
- Food Producers

Timeframe

Near term—Immediate. High priority.





DEVELOP THE KEARSARGE FOOD HUB as a Farmer Support Network coordinator for KAFS farmers.

Description

As defined in the FINE Report, a **Support Network** provides stakeholders within the food value chain with “technical assistance, support services, educational materials, professional networking forums, white papers, best-practices training, [and] marketing materials...” (FINE 2017). A farmer support network could provide services and assistance to farmers in the process of scaling up to meet wholesale requirements, while advocating for farms within the KAFS to ensure that their products are still available to customers in the local network as outside food hubs begin to serve these areas.

Why & How

According to this study, many farmers are interested in working with a distribution-type food hub. There are, however, valid uncertainties surrounding the role of food hubs regarding their presumed efficacy, fear of competition, and concerns about how an intermediary would affect profit margin and branding. In order to formally and actively address these concerns, the Kearsarge Food Hub proposes to establish a farmer support network for KAFS producers.

The overarching goal of this support network would be to facilitate farmer resilience, and to provide a net of support to help them adapt to a changing local food system, and to advocate to food hubs and prospective customers the value of supporting the farmers nearest to them. This kind of network would provide a platform for all voices to be heard, and could take on many forms, depending on the specific needs of participating farmers.

Difficulties facing area farmers that could be addressed through a farmer support network include:

- ▣ Saturated retail markets
- ▣ Competition from food hubs
- ▣ An aging farmer population and intergenerational transitions
- ▣ Challenges to new and beginning farmers
- ▣ Limited agricultural labor force

Overall, while KFH is open and excited to facilitate more distribution of local foods in the KAFS, there is a real need to simultaneously support and accommodate the farmers in the KAFS to ensure that the new system—or systems—that arise truly meet their needs. With the help of existing farmer support initiatives and organizations such as Farm Aid, UNH Cooperative Extension, Vital Communities, NH Food Alliance and others, Kearsarge Food Hub is in a uniquely fitting position to coordinate these efforts.

Investments

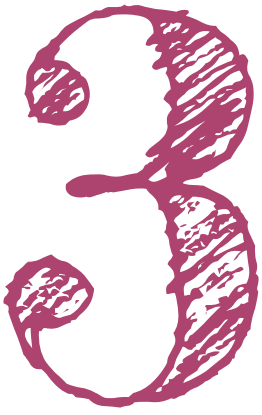
Kearsarge Food Hub strategic planning in 2020 will help to outline the specific investments needed to further organize and implement a farmer support network. Costs will include commission or base salary for personnel to coordinate the network and ongoing operating cost would need to be determined through the strategic planning process.

Stakeholders

- Kearsarge Food Hub
- Support Organizations
- KAFS Farmers

Timeframe

Immediate—high priority.



ESTABLISH A STATEWIDE FOOD HUB NETWORK to support New Hampshire's food value chain by building trust, creating a shared vision, and coordinating efforts.

Description

Food Hub Networks are a new and innovative model that is emerging across the country, in which food hubs and key food value chain stakeholders across a state or region collaborate, formally or informally, to share best practices, resources, and business services, and to buy, sell and distribute to and from each other. Networking between food hubs is one potential solution to enhance individual businesses as well as improve the flow of local products across the state. Establishing a statewide food hub network in New Hampshire would directly support the local food economy by enhancing the sale, consumption, and access to local products.

Why & How

Food hubs serve a valuable function in growing the local food economy through sales, aggregation, and distribution of source-identified local products. New Hampshire food hubs are at a critical stage of development and stand to benefit from a network that supports their growth as integral players in New Hampshire's agricultural economy. Food hubs in New Hampshire should learn about each other's functions and capacity; collaborate on logistics such as cross-docking, sales platforms, and transportation; and build relationships that will foster a successful network.

Additionally, participation by representatives from every part of the food value chain is important to ensure that the efforts of a food hub network are truly serving both producers and buyers. In the interest of cooperation for the betterment of the whole state of NH, it is important that the conversation be neither too concentrated in food hub interests nor to be diluted by a diversity of interests. Other groups,

such as self-distributing farms, community support organizations, institutional buyers, and chefs should be invited to join in the conversation to ensure that all voices are heard as this networks takes shape.

To this end, the research team applied for and received funding through the USDA's Specialty Crop Block Grant to help establish such a statewide food hub network. Part of the intent of this grant project was also to mirror current efforts happening in Vermont; where a similar statewide food hub network has already begun. Vermont has proven itself a national leader in developing local food markets, and has led the way in farm-to-school initiatives and food hub development. As such, it behooves the state of New Hampshire to walk in step with the ongoing efforts of its neighboring state in order to bolster similar efforts both at home and across the region.

Investments

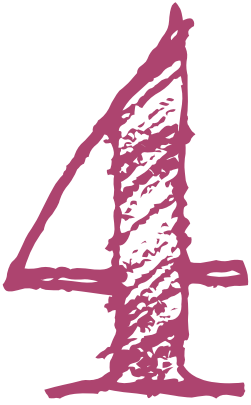
Grant funding can provide the investments necessary to continue focus group work toward building a Community of Practice, while addressing the concerns highlighted in this research around proper compensation for participation and leadership. Specifics regarding roles and compensation, how much and commission or base salary, still to be determined.

Stakeholders

- Producers
- Food Hubs
- Support Networks

Timeframe

Immediate—high priority.



CREATE STRATEGIC MARKETING PLANS to communicate the source, story and value of local food that can educate the community and develop demand.

Description

Communicating the value of local food is a priority for both producers and buyers. The data from this report shows that producers struggle with marketing their product, and buyers also struggle to convey the source and story of the food to the end-user. More intermediaries, like food hubs, can help develop channels between producer and buyer, but may also create more space between them. However, food hubs can also act as a catalyst for strategic marketing initiatives. Strategic marketing can offer a nimble approach to promoting local farms and foods while maintaining the story of the source throughout.

Why & How

Strategic marketing can take many forms to help communicate the true value of local to potential buyers and offset the common perception that it is overpriced and inaccessible. This can increase demand for local foods and a willingness to pay fair prices to farmers for their products, through expanding upon marketing efforts for farms and food hubs to promote local foods, support brand awareness, highlight seasonality, and put it all into context within the food value chain.

This marketing can be accomplished by food hubs, their transactional networks or support organizations. The forms that this kind of marketing can take are varied and diverse, including (but certainly not limited to!) social media campaigns, print ads, posters, calendars, local food events, presentations, etc. The arts can be powerful for this kind of storytelling and marketing. Campaigns can be conducted more

broadly, such as statewide like Vermont Farm to Plate, or they can be more specific within a certain institution or relationship, such as posters throughout a hospital or college campus dining hall highlighting the contributing farms.

This strategic marketing strategy can also help to highlight deeper issues within a food value chain:

- ▣ Supporting the local economy;
- ▣ Farmland preservation and viability;
- ▣ Providing humane treatment and animal welfare;
- ▣ Expanding community access to fresh food; and,
- ▣ Demonstrating environmental stewardship.

Investments

Can be varied. Social media campaigns require little funding but ample time/labor for organization and implementation. Print ads and print materials have their own associated costs. Posters, graphic designs, and artwork would likewise require unique investments. Events are low-cost yet time intensive. The main cost uncertainty lies in compensation—how much, commission or base salary, and funded from what sources.

Stakeholders

The Kearsarge Food Hub in collaboration with:

- Farmers • Food Hubs • Artists • Institutions
- Restaurants • Local Retailers

Timeframe

Ongoing, high-priority.

GLOSSARY

COMMUNITY OF PRACTICE

A community of practice is a group of people connected by a shared interest, concern, or passion, whose collective purpose is to learn from each other, build intellectual and social capital, and develop solutions toward common goals. (from [THE FOOD SYSTEMS LEADERSHIP NETWORK](#) handout by the Wallace Center at Winrock International)

COOPERTITION OR COOPETITION

A neologism of the words cooperation and competition. With respect to inter-organizational relationships, “coopetition takes place when companies that are in the same market work together in the exploration of knowledge and research of new products, at the same time that they compete for market-share of their products and in the exploitation of the knowledge created.” ([wikipedia.org](#)) This type of interaction is supported by the belief or understanding that more can be accomplished in the interest of learning and collaboration than solely in winning.

FOOD HUBS

“Fundamentally, a food hub is a 'businesses or organization that actively manages the aggregation, distribution and marketing of source-identified food products, primarily from local and regional producers to strengthen their ability to satisfy wholesale, retail and institutional demand' (Barham et al., 2012, p. 4). Food hubs have also been described as 'financially viable businesses that demonstrate a significant commitment to place through aggregation and marketing of regional food' (Fischer, Pirog, & Hamm, 2015a, p. 97).” (p. 11) (2017 National Food Hub Survey)

Types of Food Hub Models:

- ▣ Wholesale or Farm-to-business/institution model, which deals to wholesale buyers
- ▣ Retail or Farm-to-consumer model, which deals in online, physical, or CSA-style direct-to-consumer transactions
- ▣ Hybrid model, which deals in both wholesale and retail transactions (from [Regional Food Hub Resource Guide](#) (PDF). 2012.)
- ▣ Distribution-type food hubs are actively involved in the aggregation, storage, and distribution of source-identified foods

FOODSHED

“The geographic location that produces the food for a particular population. The term describes a region where food flows from the area that it is produced to the place where it is consumed, including the land it grows on, the route it travels, the markets it passes through, and the tables it ends up on.” ([from Foodshed Alliance](#))

FOOD VALUE CHAINS

An innovative business model in which agricultural producers, manufacturers, buyers, and other related supply chain actors form collaborative, transparent partnerships that attempt to combine product differentiation strategies with commitment to shared operational values and social mission goals. Unlike traditional corporate marketing approaches, which focus on the superior attributes of a firm's products or services, value chains address customers' desire to promote social improvement. They incorporate social or environmental mission values within the traditional scope of product differentiation strategies, focusing on such issues as:

- Supporting the local economy;
- Farmland preservation and viability;
- Providing humane treatment and animal welfare;
- Expanding community access to fresh food; and,
- Demonstrating environmental stewardship.

(definition from [Agricultural Marketing Service, USDA](#))

KEARSARGE AREA FOODSHED (KAFS)

The geographical focus of the Kearsarge Food Hub, the administrators of this grant project, which is a 30-mile radius around the organizations location in Bradford, New Hampshire.

SUPPORT NETWORK

This category includes networks that evolve to provide members with technical assistance, support services, educational materials, professional networking forums, white papers, best-practices training, marketing materials, etc. (definition inspired by [2017 FINE Food Hub Network Report](#))

TRANSACTIONAL NETWORKS

Key stakeholders that aggregate, process, distribute and/or market goods and those networks that evolve to facilitate transactions between them, such as online platforms. (definition inspired by [2017 FINE Food Hub Network Report](#))



APPENDIX

This appendix demonstrates a web of food hubs, organizations, networks, and resources woven together with common missions based in strengthening the food value chain by increasing sustainable production and distribution of local foods.

These resources can all be leveraged in some way to move the recommendations of this report forward, either by setting an example, creating and sharing knowledge, building networks, or playing a supportive role. This is not a comprehensive list, but a representation of the resources and models involved in creating greater access to local foods from a variety of perspectives.

For each entity, we will introduce the **mission and function**, **example of work** (particularly related to this report), and the key **takeaway**.

Food Hubs & Distribution Models

FOOD CONNECTS

Mission and Function

Food Connects exists to deliver local food and offer educational and consulting services aimed at transforming the local food system. As a nonprofit, this organization is an interesting hybrid between providing food distribution and providing education and consulting, specifically in schools.

Example of Work

[Farm to school resources](#) specifically designed for their Vermont service area.

Takeaway

Food Connects is a major partner of the KFH research team and shares similar goals of empowering communities, including institutions, to procure more healthy local foods. The function of Food Connects represents not only the capacity and infrastructure for distributing local foods, but also a focus on the educational and consulting aspect related to bringing more buyers into the fold. It is a unique and informative example of local and regional food distribution, with a current service area of Vermont and Western New Hampshire.

GENUINE LOCAL

Mission and Function

Genuine Local is New Hampshire's only food production accelerator with a core mission to lower the bar to entry for food producers. GL fills the gap created by a lack of access to commercial production facilities and helps food companies grow by providing business development and production assistance and even provides small batch co-packing services.

Example of Work

[Technical Assistance through events and equipment videos](#)

Takeaway

With a focus on food preservation, production, and business incubation, Genuine Local offers a unique service to the network of hubs within New Hampshire.

LOCAL BASKIT

Mission and Function

Local Baskit offers cook-at-home meal kits with fresh and inspiring recipes and ingredients from New Hampshire farms and food artisans with pickup and recycle locations in Concord, Manchester and three Seacoast locations as well as in Amherst, Warner and Meredith with more coming online monthly. We also ship to any address in New Hampshire.

Example of Work

Local Baskit prioritizes [working with New Hampshire farms](#).

Takeaway

Meal kits such as this are becoming more popular. They help create greater access to fresh local foods in a convenient way, while incentivizing cooking with fresh local ingredients through recipe sharing. It's an important model to keep an eye and partner with in efforts to increase local food distribution.

LOCAL HARVEST CSA

Mission and Function

A multi-Farm CSA made up of five certified-organic New Hampshire family farms. We have been working together since 2002 to provide Concord and surrounding areas with the best organic produce possible. Local Harvest CSA offers three weekly share sizes during the three growing seasons for a total of 26 weeks of all organic produce.

Example of Work

Local Harvest CSA has [an easy online ordering process](#).

Takeaway

CSA shares are an effective mode of guaranteeing markets for farmers and ensuring access to local foods for consumers in a direct way. A multi-farm CSA like this also plays an important role in marketing for local farms.

THREE RIVER FARMERS ALLIANCE

Mission and Function

A network of local farmers working cooperatively to distribute local food to the greater Seacoast NH region, with an online marketplace that provides a one-stop shop for ordering fresh local food from over 40 farms and food producers. They offer an extensive selection of locally grown, seasonally available products with a convenient year-round delivery service to restaurants, stores, institutions, schools, and other wholesale buyers.

Example of Work

They also offer a [multi-farm CSA](#).

Takeaway

Three River Farmers Alliance represents an example of multi-farm cooperation that serves a variety of markets through wholesale distribution. They are an important representation of a food hub model that addresses farmers needs for steady markets and the needs of restaurants, institutions, schools and more to have convenient access to local foods year round.

Organizations, Networks & Resources

FARM AID

Mission and Function

Farm Aid's mission is to keep family farmers on the land. They are best known for their annual music, food and farm festival, while also working each and every day, year-round to build a system of agriculture that values family farmers, good food, soil and water, and strong communities.

Example of Work

Farm Aid operates a [farmer support line](#) to help farmers to access the resources they need in times of crisis.

Takeaway

In particular relation to the third recommendation of this report, specifically to develop a farmer support network for the Kearsarge Area Foodshed, Farm Aid stands as a powerful example of what can be done in the name of supporting family farms.

FARM TO INSTITUTION NEW ENGLAND

Mission and Function

FINE exists to help mobilize the power of New England institutions to transform our food system. FINE is a six-state network of nonprofit organizations, government agencies, institutions, foundations, farms, food distributors, food processors, food service operators and others working together to transform our food system by increasing the amount of good, local food served in our region's schools, hospitals, colleges and other institutions.

Example of Work

The 2017 [FINE Report](#), which explores options to enhance food hub collaboration and increase New England farm to institution sales.

Takeaway

FINE and their 2017 report, which was funded by the same LFPP grant as was this research, is a benchmark for work related to greater farm to institution distribution. While this study takes a look at a smaller service area in the Kearsarge region of New Hampshire, FINE is taking a critical view of New England as a whole.

FOOD SOLUTIONS NEW ENGLAND

Mission and Function

FSNE is a UNH-based regional, collaborative network that serves as a convener, cultivator, and champion of our regional food system. FSNE believes that New England can be substantially food self-reliant, producing as much as 50% of the food we eat by 2060. (NE Food Vision: 50x60) Racial equity and food justice are fundamental guiding principles for restoring and improving healthy ecosystems and a working landscape that supports our quality of life and diverse, thriving communities.

Example of Work

- [New England Food Vision](#): A bold vision that calls for our region to build the capacity to produce at least 50% of our food by 2060 while supporting healthy food for all, sustainable farming and fishing, and thriving communities.
- [Home Grown \(2010 Report\)](#): The economic impact of local food systems in New Hampshire

Takeaway

FSNE offers an important perspective of regional food security, and common goals and language through the New England Food Vision, that all stakeholders along the food value chain can adopt to strengthen local and regional food systems. Something like the New England Food Vision gains traction only when others agree to sign on and work toward the goals set therein, together. Many of the organizations on this appendix do claim the food vision as a primary goal. To get to producing 50% of the food we eat in New England by 2060, we have a lot of work to do, individually and collectively.

HENRY P. KENDALL FOUNDATION

Mission and Function

The primary goal of the Henry P. Kendall Foundation is to create a resilient and healthy food system in New England by increasing the production and consumption of local, sustainably produced food.

Example of Work

- [Regional Movement Building](#)
- [Farm to School](#)
- [Food Vision Prize](#)

Takeaway

This is a well established organization participating in NE Food Vision: 50x60. Although not directly involved with this research, connecting with regional organizations such as this will help advance the mission of more robust production and distribution all throughout New England.

NEW HAMPSHIRE ASSOCIATION OF CONSERVATION DISTRICTS

Mission and Function

In New Hampshire, there are 10 conservation districts, each with the same mission: to coordinate assistance from all available sources—public and private, local, state and federal—in an effort to develop locally-driven solutions to natural resource concerns.

Example of Work

[Merrimack County Conservation District](#) is a non-regulatory public agency that works in partnership with the USDA Natural Resources Conservation Service (NRCS) to help land owners and users in Merrimack County manage their soil, water, forest, and other natural resources. They serve residents, town officials, educators, members of non-profit organizations, and others in the 27 towns that make up Merrimack County.

Takeaway

Conservation districts are active in supporting farmers and sustainable farming practices, with a focus on natural resources and soil health. As the local, state, and regional levels look to produce and distribute more food, the resources and support provided by organizations such as this will prove valuable for growing the agricultural sector in a sustainable way.

NEW HAMPSHIRE DEPARTMENT OF AGRICULTURE, MARKETS AND FOOD

Mission and Function

The mission of the NHDAMF is to support and promote agriculture and serve consumers and business for the benefit of the public health, environment and economy.

Example of Work

- [Agriculture Development Publication and Forms](#)
- [NH Agriculture Promotional Mini Grant](#)

Takeaway

This state department is a wealth of resources and support, including funding and an ongoing stream of events, webinars, courses, and up to date information on laws and policy.

NH FARM TO SCHOOL

Mission and Function

The NHFTS Program serves as a facilitator engaging farmers, distributors, food service directors, teachers, health educators and administrators in adopting farm to school practices. The Sustainability Institute at UNH serves as the backbone organization. Their functions include:

- Help negotiate simple, affordable systems for purchase of NH grown and produced foods by K-12 schools or distributors serving those schools;
- Create, collect, and distribute support and educational materials tailored for individual stakeholders and program partners;
- Provide and present information on how to integrate farm to school connections into curriculum and school policies; and
- Work with stakeholders and media to enhance the visibility and effectiveness of farm to school efforts.

Example of Work

NH Farm To School & NHFA's farm-to-institution action team [toolkit for institutional buyers](#)

Takeaway

NHFTS started in 2003 as a pilot program to bring local apples and cider into schools of NH. The program took off and represents an example of how to start getting more local food into schools by taking it one crop at a time. They have another program to help introduce more local food from farms on the seacoast to grades K-12. This is an important organization moving forward and testing ways to strengthen local distribution to schools, while creating and sharing resources to form partnerships in this mission.

NH FOOD ALLIANCE

Mission and Function

The NH Food Alliance aims to influence and shape the future of our emerging local food economy to build a food system that works for all in New Hampshire: people, businesses, communities, and the environment. Specific functions include:

- Amplify and connect the work of organizations and coalitions across the state;
- Exchange information and resources across NH regions and create space for innovations to emerge;
- Work in an aligned way on broadly shared goals and measurable action priorities;

- Keep a focus on the whole state and inter-connections across issues (eg. find synergy, pursue win-win solutions); and
- Organize a diverse and powerful community voice.

Examples of Work

- The annual [NH Food Alliance's annual statewide gathering](#) and
- [The Viability Initiative](#)

Takeaway

The NH Food Alliance is a partner of this research and offers a unifying platform for increasing collaboration and success for all stakeholders in the NH and regional food value chain. They provide an important base for discussing and sharing messages related to local and regional food viability.

[NOFA-NH](#)

Mission and Function

The Northeast Organic Farming Association of New Hampshire (NOFA-NH) is a 501(c)3 non-profit organization dedicated to building a community of organic food activists and educated consumers to help support New Hampshire's local organic farming community.

Example of Work

[Farm share program](#), which connects low income folks with CSA's from participating farms.

Takeaway

NOFA-NH is a valuable resource and partner in supporting family farms and championing organic farming practices that promote health and environmental wellbeing. They offer many programs and resources, including conferences that bring farmers and others together to share knowledge and ideas.

[UNIVERSITY OF NEW HAMPSHIRE](#)

Mission and Function

A New Hampshire's flagship public research institution with a special commitment to pursuing research that contributes to the greater good.

Examples of Work

- The [Sustainability Institute](#) brings diverse people and ideas together to make the university a model sustainable learning community that reaches beyond campus to engage state, regional, national, and international partners to advance sustainable solutions.
- The [Cooperative Extension](#) is a network of support for furthering education for communities across New Hampshire, with a focus on food and agriculture.

Takeaway

Colleges and universities are great partnering organizations for increasing local food sales and consumption in institutions, as well as furthering educational messages around the value and health of local food. As a research based institution with many initiatives focusing on topics related to local food marketing, distribution, and career viability, UNH specifically is a great resource for the healthy development of local and regional food value chains.

USDA

Mission and Function

Providing leadership on food, agriculture, natural resources, rural development, nutrition, and related issues based on public policy, the best available science, and effective management.

Example of Work

- [USDA \(2019\) Producers profile: Farmer Census](#)
- [Funding for this project through the Local Food Promotion Program](#)
- [Regional Food Hub Resource Guide](#)

Takeaway

The USDA is an important nation-wide source of information and funding for projects relating to food and agriculture. This is a substantial organization made up of 29 agencies and offices with nearly 100,000 employees at more than 4,500 locations across the country and abroad. It should be consulted and utilized to advance local and regional food system initiatives.

VERMONT FARM TO PLATE

Mission and Function

The goal of Vermont Farm to Plate is to increase economic development and jobs in the farm and food sector and improve access to healthy local food for all Vermonters. The Network encompasses farms, food production businesses, specialty food producers, educational institutions, nonprofit organizations, capital providers and government. Working Groups, Cross-cutting Teams, and Task Forces convene to work on high impact projects to relocalize the food system that no one organization can do alone, as well as assess gaps, opportunities, and trends and monitor progress towards reaching Vermont's Farm to Plate goals.

Example of Work

The [Consumer Education and Marketing working group](#) offers strategies to improve consumer's ability to find, purchase, and use local foods. Efforts to increase local and regional food marketing, enhance consumer education and awareness, and expand agritourism opportunities are central to the group, consisting of food marketing professionals, food access organizations, trade associations, retail market owners, researchers, educators, nutritionists, and organizations working on consumer education around healthy, local food.

Takeaway

Vermont Farm to Plate sets an example for furthering strategic marketing around local foods and across a robust network of organizations, institutions, businesses, communities and individuals. This is the kind of networking and marketing that is needed in a more unified and cohesive way in New Hampshire.

VITAL COMMUNITIES

Mission and Function

Vital Communities is a nonprofit organization that cultivates the civic, environmental, and economic vitality of the Upper Valley, bringing people together, bridging boundaries and engaging the whole community to create positive change.

Example of Work

One sector of Vital Communities is the [Valley Food and Farm program](#), which includes a farmer climate network, farm to school support, and resources for wholesale farmers and buyers.

Takeaway

Vital Communities is an example of a multifaceted organization that focuses on sharing knowledge to help strengthen local communities, with resources and funding specifically in the realm of food and farming.

WALLACE CENTER

Mission and Function

The Wallace Center develops partnerships, pilots new ideas, and advances solutions to strengthen communities through resilient farming and food systems. The center pursues this mission through offering technical assistance, sharing knowledge, connecting resources, and building networks.

Example of Work

- [Wallace Center Food systems leadership network handout](#)
- Sponsoring and the [National Good Food Network](#)

Takeaway

The Wallace Center is an important leader in building resilient food systems all across the country. Their voice and their work represent the power of collaboration, sharing ideas, and supporting sustainable local food systems from a nation-wide perspective.

WHOLESOME WAVE

Mission and Function

Wholesome Wave is the leading national organization working to increase affordable access to fruits and vegetables for people who struggle with hunger. It is interested in distributing more fruits and vegetables to the 40 million people struggling with hunger across the US. The approach includes offering tools and best practices, consulting, and network building.

Example of Work

- [Tech Guide for Food Hubs](#)

Takeaway

With a vested interest in more robust distribution of fresh fruits and vegetables, Wholesome Wave is an important nation-wide resource for strengthening channels that bring food from farm to plate. They are proponents of things such as the fruits and vegetables prescription program which incentivizes healthcare providers to prescribe healthy foods to their patients.

