

Speaking of Vermont Local Food

Interviews by Dave Timmons

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1. Vermont Local Food

Local food is getting much attention in Vermont and around the country. Historically, most important food crops were raised in Vermont: beef, pork, chicken, eggs, wheat, corn (for grain), oats, beans, potatoes, pears, cherries, and apples were all produced in greater quantities in the past than now (in most cases, in much greater quantities). Though only dairy production is at its peak, history suggests that Vermont is capable of feeding itself. Yet based on current production, the state is clearly not doing so: according to data from the USDA Census of agriculture, Vermont produces at most 38% of its own food, even if every potentially local food item stayed in the state. And much of the production that could provide local food is in fact exported; actual food self-sufficiency is much less than 38% (and harder to measure).

On the other hand, Vermont is at the center of a renaissance of farmers' markets, farm stands, and other forms of direct sales from farmers to consumers. Nationally, direct sales doubled between 1992 and 2002, and in Vermont, increased by a factor of 2.4. Direct sales exclude sales at grocery stores, co-ops, restaurants, and sales of processed foods—for these and other reasons, direct sales represent only a small portion of total local food activity. But direct sales are arguably the best indicator of consumer interest in and demand for local foods, likely the most critical component of a local food system. And here Vermont excels, with the highest per-capita direct sales of the fifty United States, at 5.5 times the national average. While tourists and others passing through undoubtedly assist in this effort, tourism alone does not account for Vermont's high direct sales. Vermonters buy more food from local farmers than do most Americans.

2. The Local Food Interview Project

While the USDA Census of Agriculture provides data on production and direct sales, more specific information about the opportunities and constraints the Vermont food system is not easily found. Thus during the summer of 2006, twelve individuals close to the Vermont local food scene were selected to contribute their knowledge by participating in structured interviews. The twelve included managers at the Burlington, Montpelier, and Brattleboro food cooperatives; managers from the Norwich, Montpelier, Brattleboro, and Burlington farmers' markets (the four largest markets in the state); owners of two food distribution companies that specialize in local produce; a grain grower, a buyer for a college food service known for its local focus, and the director of a non-profit organization promoting farm-to-restaurant connections (see table 1). In-person interviews of approximately 45 minutes were conducted with each individual, and the same questions were asked of all twelve.

Table 1. Interviewees for Project

Interviewee	Town	Position
a. Alex Gyori	Brattleboro	co-op manager
b. Kari Bradley	Montpelier	Hunger Mountain Co-op manager
c. Clem Nilan	Burlington	City Market merchandising manager
d. Lisa Holderness	Brattleboro	farmers' market board president
e. Susan Johnson	Burlington	farmers' market manager
f. Jessie Schmidt	Montpelier	farmers' market manager
g. Franny Eanet	Norwich	farmers' market manager
h. Mark Curran	N. Springfield	owner, Black River Produce
i. Allen Freund	Waterbury	owner, Squash Valley Produce
j. Ben Gleason	Bridport	owner, Gleason's Grains
k. Charlie Sargent	Middlebury	College food service buyer
l. Meghan Sheradin	Richmond	director, Vermont Fresh Network

Interview questions with consensus answers are shown below (“consensus” in this case meaning the general theme put forth by most of those interviewed; actual, detailed answers given by each person are provided in section 3):

1. Do you think demand for local food exceeds supply, or supply exceeds demand? Are there differences by product?

Consensus answer: In general, supply equals or exceeds demand for traditional vegetables (sweet corn, zucchini, tomatoes) in season. For almost all other products, including traditional vegetables outside of the normal season, demand exceeds supply.

2. In your experience, do you think prices for local food are generally less than, comparable to, or more than non-local food? Again, are there differences by product?

Consensus answer: With a few possible exceptions, local food generally costs more. But in many cases the local product is also of higher quality, so it may not be fair to compare on price alone.

3. What do you see as the biggest obstacles to more food being local?

Consensus answer: Production costs are generally higher in Vermont than elsewhere, based on a short growing season, smaller farms that lack scale economies, and relatively high land prices. Lack of processing and distribution facilities are also obstacles for many foods.

4. What or where are the greatest opportunities for more local food? Which products are most likely to expand their local markets? What advice might you give to farmers?

Consensus answer: Local food is enjoying much new visibility and interest, so there are many opportunities. These include growing crops that have not been widely grown in Vermont in the recent past (e.g. grains) as well as non-traditional crops (e.g. bok choy, fennel). There are also opportunities for processing, storage, and distribution of crops

that are already raised here (dairy, beef, root vegetables), making more local food available to consumers on a year-round basis.

3. The Interviews

While the consensus answers above provide a general sense of the group interviewed, the actual answers from the interviewees (below) provide much more detail and nuance, as well as potentially useful suggestions.

1. Do you think demand for local food exceeds supply, or supply exceeds demand? Are there differences by product?

1a. Alex (Brattleboro Co-op): It could be either way, and the Co-op has experienced both. In general demand is far greater than supply. Our managers think that if we really pushed local foods, demand would far outstrip supply.

The Co-op is currently putting in place data systems to establish baselines, and to figure out how much of the food we sell is actually local for different categories of food. (based on a local definition that we have developed). We have a local food committee that is guiding these efforts. Many people perceive that the Co-op does not carry enough local foods, though we are undoubtedly the largest local food outlet in the Brattleboro area.

1b. Kari (Hunger Mountain Co-op): Supply and demand vary, and there is a seasonal influence on produce. In season, the Co-op has more produce than it needs (Co-op buys all organic, and buys local when available).

For milk, our top seller has not had enough supply, and the Co-op could not count on having it as needed. A new vendor has adequate supply, though the product is not organic, and it's packaged in plastic rather than glass. Beef, chicken, and pork are all in short supply and could use more regular distribution. For the Co-op, "regular" means four times per week. Some suppliers only come twice per week—which translates into holes on shelves. In some cases distribution is probably a bigger problem than production. The Co-op has a long-time supplier of local chicken, and sells much of this product, though the supplier can't meet all of the Co-op's needs.

Cheese supplies are available, as is butter and yogurt, at least from one large supplier. Smaller producers also have good products but can't supply these products at the rate needed.

In general, supply is not quite there to meet demand, and I'm concerned about future supply.

1c. Clem (City Market): Demand exceeds supply by a lot. There are shortages of local cheese, milk, meat, grocery, etc. The local food system is dynamic and evolving. Goat cheese, for example, is very popular now, and the Market can't get a steady supply. But farmers are reluctant to jump into a new market until and unless the demand for the product is secure.

City Market and the co-ops in Middlebury and Montpelier have a new joint agreement for a Vermont-label milk product. Until now we have had trouble keeping Vermont milk on the shelf, but so far this is working well, with a guaranteed price for producers and a guaranteed supply for us.

Farmers tend to sell direct when they can, which means the direct markets get the first shot at the products. We're just now starting to get Vermont corn, for example, though people have been able to get it direct for a while. Producers would find local demand if they could extend the season for the typical summer crops.

1d. Lisa (Brattleboro farmers' market): A fair amount of food goes home from the farmers' market, especially seasonal greens. But demand is high and unsated for eggs and meat. Local protein demand definitely exceeds supply. And in winter demand is still there but supply is not. In general, if there were good marketing, local food demand would exceed supply. Local food production has the potential to squeeze out many imports.

1e. Susan (Burlington farmers' market): consumers would buy more local food if it were available. Grocery store chains and institutions are hard for producers to get into. One food service that some state institutions use, and which should be setting an example by buying local, asks producers for a \$1 million liability insurance policy. Restaurant chains feel they have to jump through too many hoops to buy direct from producers.

At the farmers' market, vendors normally sell out of eggs by noon. Strawberries, blueberries and most other stuff are gone by 2:30. Potatoes, beets, turnips, and carrots are available year round. There always seems to be lots of lettuce. There is currently a pretty good supply/demand balance at the farmers' markets: farmers have a good idea of how much they can sell, and plan accordingly. The Burlington market's problem is that it's out of room for more customers.

1f. Jessie (Montpelier farmers' market): Supply often creates demand, and things that people don't now have access to would be purchased if they were available—meat and poultry, local dairy products, etc. Lot of regulations effectively keep these products out of the market.

In the produce market, supply and demand appear to be in equilibrium. The Montpelier market has brought in one new produce person each year, for several years, and the new supply seems to have been adequately absorbed. New farmers' markets have also been opening. Vendors always worry that additional vendors or markets will reduce each vendor's sales, but total sales usually increase with more vendors.

For farmers' markets, the size and wealth of the local population is critical to market success—90% of the Montpelier market's mailing list is local. Tourists help some, especially in the fall, but it helps the crafters and specialty producers more than the farmers.

1g. Franny (Norwich farmers' market): Farmers always sell out of some items (though some stuff is usually left over as well). Corn, berries, and spinach often sell out. There is not enough cheese. A short season limits some items, like asparagus. But there is always

plenty of zucchini. In general if there were more supply, more people would shop—the supply has to be there first.

1h. Mark (Black River Produce): Right now we have more produce than we can use. In two weeks we'll have an excess of tomatoes. When we start to get local produce from our growers, our demand goes down, because many restaurants also buy direct from growers. We don't have any local corn right now, but there will likely be an oversupply of that soon too. We don't need any more cukes, summer squash, or zucchini, but do need bok choy. We can't get enough local cheese—demand definitely exceeds supply in that area. Black River Produce works with about 65 growers. We buy from wherever necessary to meet the demands of our customers, but we buy as close to home as possible.

Demand for local products is growing. There has been a lot more publicity recently, as well as farm-to-school buying and other activity. We recently met with a group of 34 school food service managers about buying local. We have started to carry new local products, and now transport meat as well as produce. Our business is growing, and our trucks cover most of the state. We have a state-of-the-art computer system that we use to coordinate pickups from growers and deliveries to customers, in real time.

1i. Allen (Squash Valley Produce): It depends on the product and the season. At certain times, for specific products the market is maxed out, for example for zucchini and tomatoes. These are short shelf-life products. But in general there is more demand than supply. In addition to produce, Squash Valley handles cheese and local meats. For artisanal cheeses, the demand is bigger than the supply. But this is also true nationally, so much of the local product is exported.

Products with longer shelf lives are really in a different class. These products are also in short supply, but supply is increasing. Squash valley is just breaking into local meats. Buffalo and free-range chicken are in short supply. We also distribute Vermont beef, but it's not clear how strong the demand is: people who seek out local foods may not be big beef eaters. Beef is also more of a commodity—an artisanal cheese is unique, and there is no comparable product, but the same can't be said of local beef, and the alternative (non-local beef) is cheap.

1j. Ben (Gleason's Grains): When possible, I grow exclusively for human consumption, not for animal feed. Demand is going up, and I can't meet the demand with the land I have available. But yields vary a lot from year to year. This year has been wet, and grains do better in dry years, so this year I ran out of grain to sell. Four years ago I had a very good harvest and had surplus, which I sold as animal feed at a lower price. I mostly grow wheat but also grow soybeans and have been trying hullless oats.

1k. Charlie (Middlebury College): The supply/demand situation differs by product. It's no problem to get some items locally, especially dairy (Middlebury College has a nearby dairy that has supplied the College for years).

Besides the actual supply available, cost is also a factor in the supply we can actually use in the food service. For local beef and other proteins, the supply is low and the cost is high. Dining Services does not get any extra budget to buy local. Fresh

produce is hard to get by November. Some greenhouse products are available later, but again price is an obstacle.

11. Megan (Vermont Fresh): Certain products are in short supply, others are very available, or the supply would be easy to increase. The supply of produce is good. Farmers' markets have lots of salad greens, and the price is down. Restaurants can get local produce, either through distributors or local farms. Quality is good, though more could be done with diversity and seasonality.

The local cheese supply is also good. Milk has lots of issues, but chefs know where to find local supplies (consumers might know that better than chefs).

Eggs are interesting... local ones are available, but mostly from one large-scale operation. Eggs from small farms are not so available, except at farmers' markets. The salmonella outbreak of a few years ago also scared chefs away from buying local eggs from small farms (though the risk of salmonella from small farms may not actually be any greater).

Meat and poultry may take a while. Increasing the supply will take a better product mix (prime cuts as well as hamburger), and managing the inventory so it meets the demand on a regular basis. The grass-fed meat products are also different from grain fed, and some chefs prefer one over the other. We need more local pork, and pigs can successfully forage in the woods—but again the meat tastes different than what most people are used to, more so than for grass-fed beef.

People want more local grain, and there are very few growers. Even artisanal bread makers have trouble securing local supplies.

2. In your experience, do you think prices for local food are generally less than, comparable to, or more than non-local food? Again, are there differences by product?

2a. Alex (Brattleboro Co-op): It depends on the season, but overall local products are more expensive. In-season produce like greens and root crops are sometimes cheaper. Local chicken is a more typical example: people really like the brand we carry, but it's expensive compared to the non-local brands.

2b. Kari (Hunger Mountain Co-op): Local food is generally more expensive. In Vermont the food "factory" is only open half the year (summer), which translates into higher overhead costs for producers. Distances between points of production and consumption are relatively short, but distribution networks are not totally worked out. For Co-op shoppers price is not necessarily the main issue—people grouse about high prices for local products but generally buy them anyway.

2c. Clem (City Market): Prices relate more to quality levels. People buy Vermont products because they perceive "Vermont" as a quality designation. Local products tend to be prestige products and are priced accordingly. So in general local products do tend to be more expensive. Vermont cheese is probably more expensive than some alternatives, so is guaranteed-Vermont milk. Vermont tomatoes are probably more expensive than imported ones, even in season. But City Market still buys local when possible.

2d. Lisa (Brattleboro farmers' market): For a lot of things prices are the same. I'm busy in the summer and don't get much chance to check prices at the co-ops, which carry similar products. Much of what the supermarkets carry is junk—their sweet corn, for example, may only cost \$3/dozen, compared to \$5 at the farmers' market, but the quality is not remotely similar. People do in general complain that local is more expensive. But we don't have the economies of scale here—our farm doesn't even have a tractor! Local labor is also very expensive.

2e. Susan (Burlington farmers' market): It depends...generic commodities are usually cheaper. For beans, summer squash, carrots, potatoes, etc., local growers selling directly usually get the same price the supermarkets are asking. But when growers sell to grocery stores or distributors, the markups can be very different, so the same product can have different prices in different places, and the local products can be more expensive. When growers sell to distributors they make less than when they sell direct to a customer or sell and deliver to a grocery store.

2f. Jessie (Montpelier farmers' market): Prices vary by product, but in most respects are comparable. Products are less expensive in season. Local meat is typically more expensive than commodity meat. But local quality is typically better—aging produce quickly starts to taste all the same. Grocery stores also have facilities and technology that help their products to look good.

2g. Franny (Norwich farmers' market): In general prices for local products are higher, even for abundant products like tomatoes in season, though there are some exceptions. CSA patrons get a better deal overall than people who buy individual items at farmers' markets. The year-round CSAs (that provide root crops, etc. all year) are an especially good deal. The price reports collected by the Agency of Agriculture could be used to systematically compare Vermont prices with imports.

2h. Mark (Black River Produce): Local products are slightly more expensive, even in season. For some products, the cost of trucking from California has recently doubled. But these products are still no more expensive than local ones. We buy some greenhouse production in Vermont, which also tends to be more expensive. And it's not clear whether it's environmentally better to buy a local product grown with fossil fuel in a greenhouse or a non-local product transported here with fossil fuel.

2i. Allen (Squash Valley Produce): Local foods are more expensive, but the local and non-local products are not always comparable. National prices mostly impact products with short shelf lives. For zucchini, for example, we can only pay farmers the going national market rate. Our farmers understand this, but may use us for their distribution anyway if they have enough volume, or if they have a surplus and don't have any other alternatives.

2j. Ben (Gleason's Grains): I sell wheat berries and flour to a niche market, people who want a local, organic product. The prices I get are much higher than the commodity price

for wheat by the bushel. I could never survive growing wheat in Vermont if I only made the commodity price per bushel.

2k. Charlie (Middlebury College): Prices vary by product. Local apples are cheaper than those on the produce market. Some dairy items are less—fluid milk that we buy in Middlebury, for example. Most Vermont produce is more expensive than imported. Even local potatoes are more expensive than imported. Tomatoes are a lot more expensive locally (and are not available during most of the academic year).

2l. Megan (Vermont Fresh): Local food costs less than commodities if all costs are counted (environmental pollution, etc.). But it costs more out of pocket. There are very few exceptions—maybe local zucchini in season, but probably not even that. Chefs may find it to be a huge financial transition to just pay more for local food. Some products that are available locally carry a much higher price than non-local alternatives. In some cases the product is also better, and it's hard to compare food just on prices. But we're used to not paying much for food—it's been subsidized in various ways for so long.

3. What do you see as the biggest obstacles to more food being local?

3a. Alex (Brattleboro Co-op): Prices are one obstacle. People can usually get cheaper food at supermarkets, though local might eventually be cheaper.

Connecting with a reliable supply is another challenge. A management concern is how often even formal contracts with local suppliers come up short. Small, one or two person production operations are volatile, and can disappear with little or no notice. Managers worry that we are burning bridges with larger, non-local suppliers, and that the local supply may not be reliable.

Smaller food operations may also have trouble dealing with all of the issues needed to successfully market their products, like labeling, bar codes, etc. Quality control can also be an issue.

3b. Kari (Hunger Mountain Co-op): Land values are a big problem. Farming does not provide the best return on land, so there are inherent challenges. People may not have the expertise to make farming profitable in this situation. Also, food processing, storage and distribution systems have largely been lost from the state, and to a certain extent even local retail outlets have been lost.

The Co-op has 4,000 members, and about half its sales are to members. So maybe we reach 10,000 people—but this is in a market of about 60,000 people in central Vermont. I wonder if the awareness of local food benefits and the corresponding demand are really there among the general public, enough to support local food producers.

3c. Clem (City Market): One obstacle is just our capacity to produce enough food. There are actually two trends happening at the same time: globalization and industries getting larger, but also a new interest in buying local, and in food as something other than a commodity. Local milk, for example, is mostly mixed at the processors with milk from all different places. Only three dairies can guarantee that the milk they sell is actually from Vermont. Ten or fifteen years ago, there were seven milk bottlers in the state.

City Market definitely uses more labor to buy local, dealing with many small suppliers. This is much less efficient than conventional buying and takes a big commitment by everyone, including customers who must be willing to pay the price of getting the food to market.

3d. Lisa (Brattleboro farmers' market): One obstacle is attitude: some people view local as either elitist or eco-freaky. Some people have never and would never stop to buy anything at a farmstand. Buying direct forces people to interact in ways that they might not be comfortable with. At the supermarket you only have to interact with one cashier who probably doesn't say much. The farmers' market, with all the people, cars, music, etc., probably seems overwhelming to some people. And it's less convenient—people have to change their food buying routines.

Logistics is also a challenge—matching people to products—and there could be some kind of coordinated delivery of local products. We could also use help with the logistics of farmstand operations, with getting more farmers' markets, and with getting secure locations for markets.

To get beyond seasonal produce, there also need to be processing facilities available to small producers. And labeling so that people know what is local and what is not. In Brattleboro, we could use local dairy and meat processors. The farmers' market could also take place year round (maybe one per month in winter) featuring local meat, poultry, dairy, and eggs all year.

3e. Susan (Burlington farmers' market): The biggest obstacle is getting institutions and companies to start buying local products. Lots of growers would expand production if they had secure institutional markets.

There needs to be more advertising and education about local food. At the farmers' market, we see mostly the same customers every week. Some people come to buy decorative products, like pumpkins for jack o' lanterns, but don't actually buy any food there. The typical customer is either upper middle class or a student; tourists also come, but buy a limited range of products.

3f. Jessie (Montpelier farmers' market): Distribution is an obstacle, meaning making connections between farmers and consumers, transporting to consumers, and having products arrive in good condition. For meat products, lack of slaughterhouses and processing facilities is an obstacle. For institutional use of local products, labor cost is an obstacle in preparation as well as buying. And one farmer may not have everything they need, so they may need to deal with several suppliers.

Most people shop at grocery stores, where it's hard to place local products. Many people won't buy a product unless a supermarket carries it. In addition to good prices, supermarkets also have more packaging, which some consumers may perceive as superior.

3g. Franny (Norwich farmers' market): Winter—the growing season is short. At the moment there is not enough supply to meet demand. There are a lot more food products that could be local, products that people would eat. These vary by season, though, and eating based on what's available in season is different for many people. Price is also an

issue—some produce markets bring cases of non-local fruits and vegetables in from the Boston market, and local farmers can't compete on price.

We also need to get more farmers. I only know of two farmers who have started in this area, over a period of many years. People have a hard time paying for land with the money earned farming.

3h. Mark (Black River Produce): Competition and lack of scale economies are the biggest challenges facing local growers. In California, they use mobile coolers that chill produce from 85° when it's picked, down to 45°, within ten minutes of picking. This helps tremendously in extending the shelf life of the food. Local growers don't have the same kinds of equipment, and as a result much local produce doesn't keep as well as the imported competition. And there is always downward pressure on prices. I might buy zucchini in season for \$7, and a grower might sell direct for \$10. But the same zucchini sells for just \$4 in the Boston market.

3i. Allen (Squash Valley Produce): The short growing season is a challenge. In warmer places farmers can get two crops from the same field in one year, effectively doubling the return on the land investment. The Vermont topography also means that most farms are smaller scale. Even with the cost of transporting food in, it's difficult for local small farms to compete with larger farms that develop better economies of scale. And there are established regional/seasonal growing and buying patterns. Zucchini, for example, is grown commercially everywhere between Mexico and New Jersey. It ripens at different times in different places, but the production pattern is well established, and is the same every year. The same is true for other crops.

3j. Ben (Gleason's Grains): Processing is the biggest obstacle. I mill and sell my own organic whole wheat. A larger farm would have trouble finding a market for only whole wheat flour. Demand for white flour is much greater, but this requires much more processing, and I can't do it at my scale. Dairy feed also requires quite a bit of processing: roasting the soybeans, mixing ingredients to a farmers' specifications, etc. I don't do this either—if people buy my grain for animal feed, they have to do their own processing, which takes more labor than just ordering pre-mixed feed.

In France they have more small processing facilities that are located closer to farms. I know a farmer there who can get barley, beets, alfalfa—almost anything—processed within a short distance of the farm. With processing nearby, the farmer saves money on transportation, and the finished products can be sold locally.

3k. Charlie (Middlebury College): Cost is the biggest obstacle. Other than fish, most products are available at some price. Of the local products we buy, maybe 50% come directly from producers. Our largest local supplier is for milk. We also buy a lot of local products through a Vermont distributor. We buy quite a bit of local cheese, but mostly for high-end catering events, not for the daily food service.

3l. Megan (Vermont Fresh): Different products have different barriers. Grass-fed beef, for example, needs to be finished in the summer when grass is available, then frozen, so there are inherent limits on providing a year-round fresh supply. And there is a strain on

processing facilities, since everyone needs to have their animals processed at the same time of year. For a restaurant, buying a side a beef takes more skill and labor (and is riskier), than buying specific cuts of meat. In many cases the preferred selling unit (a side of beef) is not the same as the preferred buying unit (a specific cut). Consumer skill, knowledge, and palettes may also be barriers.

For poultry there is a lack of processing facilities, and processing regulations can be an obstacle. One large Vermont producer, for example, has its own processing facility, though they only use it two times per week. The economics of building a facility to use two times in a week aren't so good, but in this case there didn't seem to be any other solution. The mobile (truck-based) processors can only service farms that sell less than 1000 birds per year, and the farmers are restricted to selling those direct (not through restaurants). In those cases the time that it takes to do direct marketing may also be an obstacle.

The state can make these issues easier to solve, for example by facilitating (not building) new slaughter and processing facilities. Another barrier may be access to land for people who want to farm.

4. What or where are the greatest opportunities for more local food? Which products are most likely to expand their local markets? What advice might you give to farmers?

4a. Alex (Brattleboro Co-op): Cooperative slaughter and packing facilities for meat and poultry are one opportunity. Another possibility is a cooperative root storage facility that would extend the season for locally grown produce. In southern Vermont there is also an opportunity for Vermont milk, like the arrangement the Middlebury, Burlington, and Montpelier co-ops made with one Vermont supplier.

In general, better distribution is an opportunity, with possibilities for better coordination of delivery and backhauling of local products. Grains should also be an opportunity in the long term. At the Co-op we talk about a 100-year plan for zero impact. This will require many more local products.

4b. Kari (Hunger Mountain Co-op): People are certainly more aware of health and environmental issues in general than they were years ago, and maybe local buying is the next step. The national organic standards have been a blessing in some ways, but they have also led to more industrial-scale organic production. Local may make more sense than organic—you don't need a nationally certified label if you know the place where your food comes from. Peak oil is also likely to increase local production.

Root vegetable storage is the most immediate opportunity for local supply. The only local year-round vegetable at the moment is carrots, and those come from southern Quebec. Even potatoes start coming in from California at some point in the year. Some local apples are available almost year round, but we could use lots more. They would sell even if they were more expensive.

Frozen vegetables seem like an opportunity, since there is such an abundance in a short season. Local meat and dairy will grow—people want local, clean, grass-fed meat. Some local processed and packaged products have succeeded, but they almost need a

bigger market than Vermont. Such products compete against others from around the region and the world.

4c. Clem (City Market): The opportunities are enormous. Vermont ranks up with California in terms of entrepreneurial activity. There are lots of examples of small “Mom & Pop” startups that became successful here. There is a wide spectrum of opportunities, not just particular niches. While there are lots of small start-up companies, it’s harder to get to the next level, with good processing, packaging, etc. Some companies get weeded out of production as they expand.

4d. Lisa (Brattleboro farmers’ market): The number one opportunity would be a local, branded dairy bottling facility. One Vermont dairy is now supplying some of the co-ops, but it’s not an organic product.

A second, huge opportunity is in local beef, chicken, and pork. And this production could also be maintaining our landscape. The quality of these local product is easy to distinguish from supermarket, commodity quality.

Why couldn’t we have a local vegetable freezing facility? The technology is simple and low risk. Efficiencies would increase, since much of what becomes waste after the farmers’ markets could be preserved. Some of the larger producers must have huge waste streams that could be tapped. Dried beans represent a similar opportunity—there aren’t many options for vegetarians who want to eat local. We could also use more season extension in general—people’s desire for foods does not match up with the seasons when food is available. There might be a targeted effort to promote hoop houses and other low-impact season extension. There also needs to be better storage for apples and root vegetables that can be kept through the winter.

4e. Susan (Burlington farmers’ market): Farmers’ markets could be taking place at more locations. The bigger markets have a long history—Burlington has been going for 27 years. But it’s a lot of work to start a new market, and people may underestimate how much effort and patience it takes for a market to succeed. One new market, for example, advertised heavily before it opened, and had a lot of customers in the beginning. But there weren’t many vendors, and not enough stuff for people to buy. So they lost many potential customers, and it will take a long time to get those people back. The market needs a better location, more advertising, and to spend more time courting vendors. But the Burlington area could support more markets.

4f. Jessie (Montpelier farmers’ market): For Vermont, the biggest opportunity is taking advantage of what is being produced in the state, to keep money in the local economy. This could include local buying by government, education, and business. This would also give farmers a more stable market, and send clear signals about what they could grow and sell (I get frequent questions from farmers about what they should grow). In Europe, food production is considered a matter of national security, and production in each country is encouraged and subsidized.

4g. Franny (Norwich farmers’ market): People want to know where their food comes from. This applies to all kinds of food—the only question may be what can be produced

profitably in the state. Some farmers sell directly just to avoid processing regulations associated with non-direct selling, and removing or revising these regulations could open up more production.

In Norwich the winter farmers' market is newer than the summer market (which is about to celebrate its 30th anniversary), and the winter market, while small, has the most opportunity for growth in sales. The holiday market is currently the most popular winter market. Improving the winter markets would both increase sales immediately, and increase later sales in the spring and early summer. It takes a while to build up the markets when the season starts, but this would be faster if larger markets took place all winter.

4h. Mark (Black River Produce): There are opportunities for more local poultry and grass-fed beef, but there is a shortage of slaughter and processing facilities. In produce there are opportunities for diversity, for growers who can get beyond the traditional New England summer vegetables.

4i. Allen (Squash Valley Produce): The most successful ventures take advantage of the demand and prices for organic products, and have some dairy and cheese in addition to produce. Whether they can do this successfully depends on how much land they have and how diverse they can become. It's important for Vermont growers to have their own retail farmstands, where they can make 40%-50% more on each sale. Distributors like Squash Valley provide a place for farmers to dump their surplus—but at commodity prices that would not support successful venture by themselves. A number of farmers have successfully moved from conventional to organic production. For products that can be shipped, developing out of state markets provides additional financial security and improves chances of long-term success. But farming will probably always be more of a lifestyle choice than a lucrative occupation.

4j. Ben (Gleason's Grains): Biofuel may be a new opportunity for a Vermont grain product—there could be a big demand. Demand for all Vermont farm products also seems to be increasing, which will create other opportunities. Vermont might try to be a model of local production and consumption.

4k. Charlie (Middlebury College): There seems to be an opportunity for some local meat cuts, for example ground beef. Farmers can sell their more expensive cuts at premium prices, but may have trouble selling the less premium cuts. These could be ground up for a less-expensive local meat product.

We also need more diversity—not more farmers growing the same things. We have plenty of lettuce, for example, but could use more fennel. We could also use more local grains, but again price may be an obstacle. Currently we use local wheat berries, but not flour. We have a local egg supplier that is not currently cage free, but is switching to cage free. Fish farming may be another possibility—we could use local fish.

Shipping and distribution need to be improved. There is much overlap of shipping routes, with different producers covering the same territories. And farmers probably spend too much time delivering single items.

41. Megan (Vermont Fresh): At the moment, local food is at a high point of visibility and interest. This means that big corporations are also trying to be part of the local movement. An interesting question is whether they can be—consumers who know where their food actual comes from can't be misled by marketing claims.

Farming is still a hard life, and people do it as a lifestyle choice. And many are making it financially. Lifestyle farms, which do direct marketing to consumers, are still a growing opportunity.

For restaurants, the next tier is getting into ski resorts. This means working with executive chefs, and providing a mix of products for different price points. Not every dinner can cost \$75. There might have to be a mix of local and non-local products.

4. Conclusions

Based on the opinions of the group interviewed (which was small, but close to the local food situation in Vermont), there appear to be both opportunities and challenges for Vermont local food. With demand for local food apparently exceeding supply for most foods in most seasons, production could clearly be increased for many foods. But Vermont producers apparently also face higher costs than competing producers outside of the state, many of whom grow on much larger scales for national or world markets. Thus in the final analysis, the continued development of the Vermont local food system is likely to depend on Vermont consumers, who will likely need to pay somewhat higher prices for Vermont food than for commodities from the national market. In return Vermonters can expect a fresher and potentially higher quality food supply, preservation of local farms, maintenance of the working landscape, and greater assurance of food security, now and in the future.