



FARM, FISH, & FOOD ENTERPRISE VIABILITY

Food is a powerful driver of economic development, public and ecosystem health, and vibrant working landscapes. When we strengthen food enterprises—the entrepreneurial backbone of the food system—everyone wins. Below are viability trends in the New Hampshire Food System based on the Viability Initiative Opportunity Areas (Education, Market Development, Food Accessibility, and Land & Sea Resources).



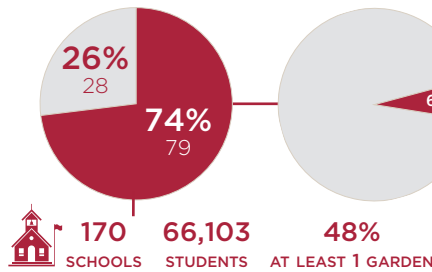
EDUCATION OPPORTUNITY AREA

Education supports viability by helping New Hampshire residents understand how eating locally improves our well-being, strengthens our economy, and protects our rural landscapes and unique New Hampshire heritage.

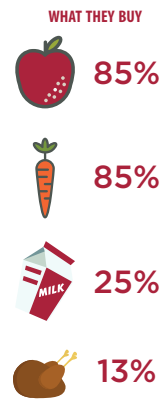
FARM TO SCHOOL

FARMERS WIN, COMMUNITIES WIN, AND KIDS WIN!
✓ Improvement in nutrition habits
✓ Increase in incorporating healthier foods into family diets
✓ Improvement in grades and test scores
✓ Increase in knowledge about food systems
✓ Increase in sales for local farmers
✓ Decrease in food waste ¹

74% of New Hampshire school districts (79 school districts) participate in Farm to School activities.²



\$840,426 —
These school districts spent 6.7% of their food budgets on local food—ranking New Hampshire 39th in the country.



- HARD TO FIND YEAR-ROUND AVAILABILITY OF KEY ITEMS: 68%
- PROBLEM WITH HIGHER PRICES: 59%
- OBTAIN LOCAL FOOD FROM DISTRIBUTOR: 72%
- OBTAIN LOCAL FOOD FROM PRODUCER: 48%

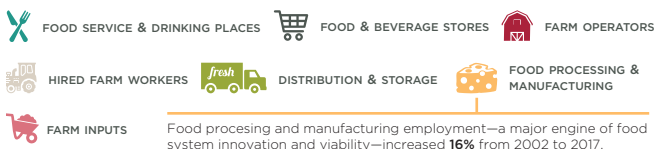
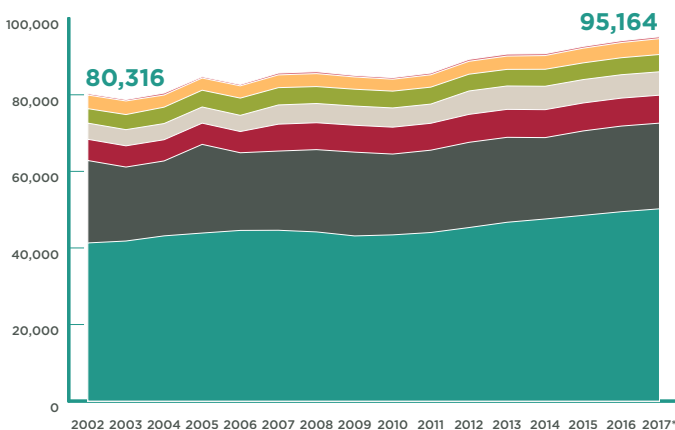


MARKET DEVELOPMENT OPPORTUNITY AREA

Market development helps foster new and strategic connections between producers and buyers in local, regional, national, and international markets.

FOOD SYSTEM EMPLOYMENT³

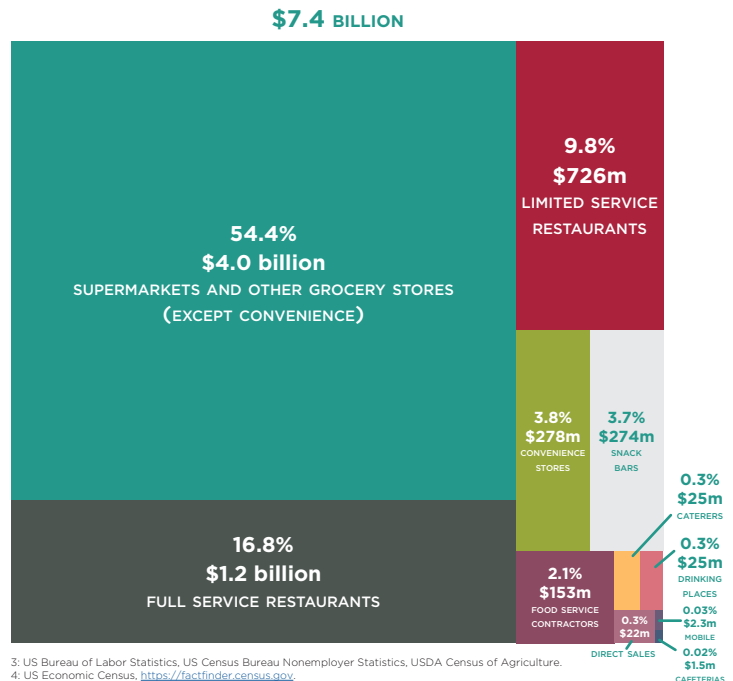
More than **95,000** people are employed in New Hampshire's food system, an 18% (+15,000 people) increase from 2002 to 2017!



Sources: 1: National Farm to School Network, www.farmtoschool.org/Resources/BenefitsFactSheet.pdf
2: USDA Farm to School Census, <https://farmtoschoolcensus.fns.usda.gov/find-your-school-district/new-hampshire>

RETAIL FOOD SALES⁴

The size of the retail food market in New Hampshire is well over **\$7 billion**. Direct sales make up only 0.3% of our retail food market.



3: US Bureau of Labor Statistics, US Census Bureau Nonemployer Statistics, USDA Census of Agriculture.
4: US Economic Census, <https://factfinder.census.gov>

FOOD ACCESSIBILITY OPPORTUNITY AREA

Food accessibility supports viability because we are all better off when New Hampshireites of all ages, ethnicities, and income levels have access to, and can afford, locally produced foods.

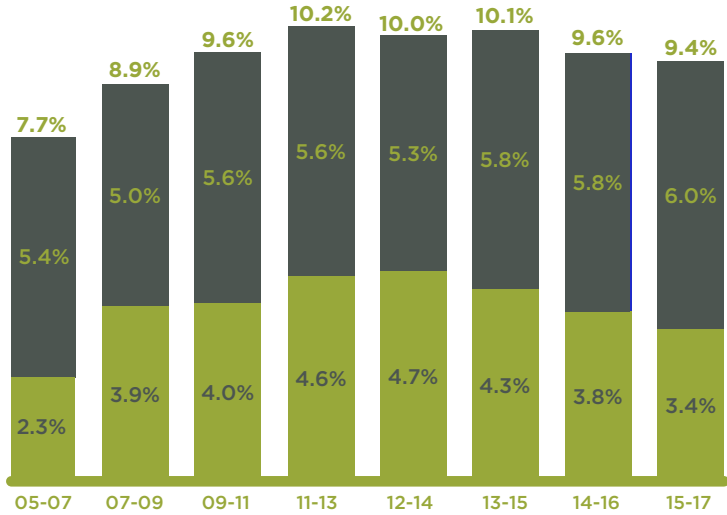
FOOD SECURITY¹

Food insecurity in New Hampshire has *decreased* from the heights of the Great Recession but is still *higher* than pre-recession levels.



An average of **9.4% (49,510)** of New Hampshire households—**121,301 people**—were food insecure from 2015 to 2017.

PREVALENCE OF HOUSEHOLD FOOD INSECURITY IN NEW HAMPSHIRE

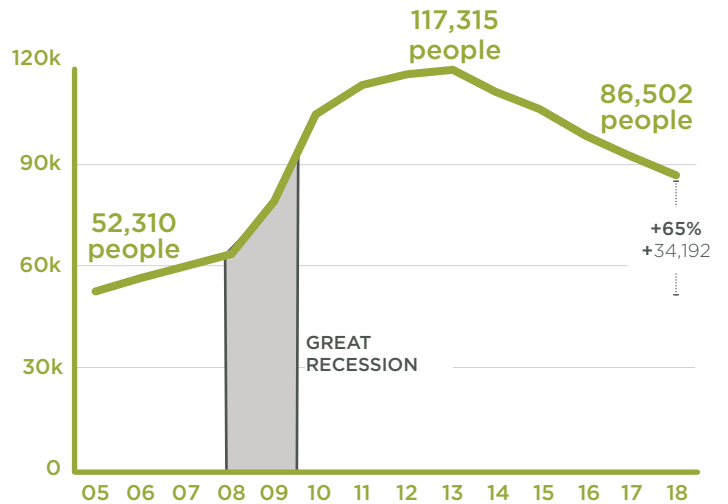


- Low food security:** reports of reduced quality, variety, or desirability of diet. Little or no indication of reduced food intake.
- Very low food security:** reports of multiple indications of disrupted eating patterns and reduced food intake.

SNAP²

The need for food-purchasing assistance rapidly increased during and after the Great Recession in New Hampshire. The Supplemental Nutrition Assistance Program (SNAP) provides food-purchasing assistance for low- and no-income people—an average of **\$93 per person per month** in New Hampshire in 2018.

NEW HAMPSHIRE SNAP PARTICIPATION



+12,000
WIC PARTICIPANTS

+80,000
NATIONAL SCHOOL
LUNCH PROGRAM
PARTICIPANTS



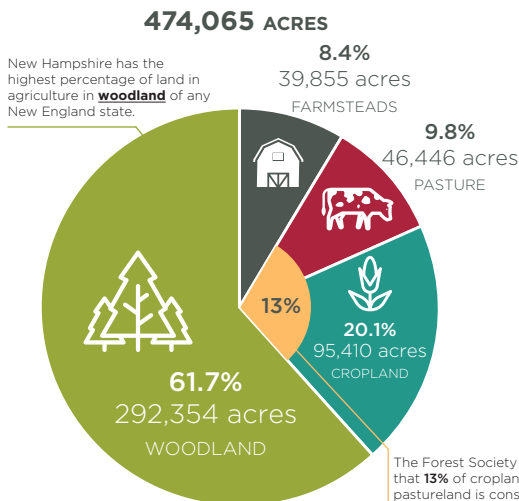
The Granite State Market Match program *doubles* the purchasing power of SNAP at CSAs, farmers' markets and farm stands.

51% OF NH FARMERS' MARKETS ACCEPT SNAP³

LAND AND SEA RESOURCES OPPORTUNITY AREA

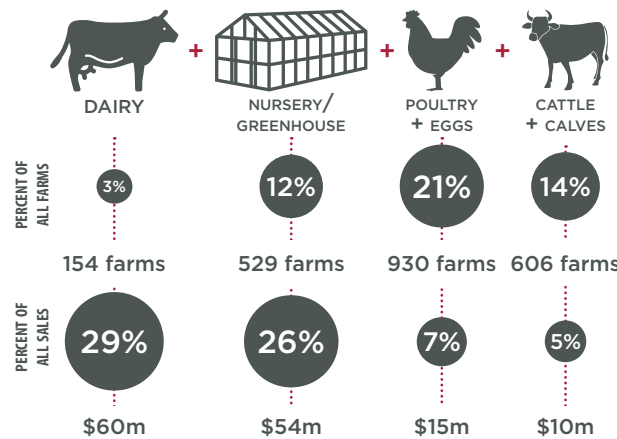
Maintaining healthy soils and fisheries—and expanding access to New Hampshire's land and sea resources—are key to the viability of our food system.

LAND IN AGRICULTURE⁴



AGRICULTURAL SALES⁵

Ag sales are concentrated in a few categories.



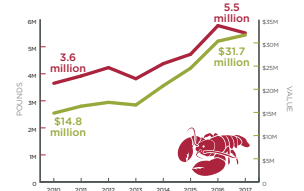
TOTAL AG SALES
\$602,213,195

4 product categories accounted for **50%** of farms and **67%** of sales

NOTE: the sales value for hay farms, the most common type of farm in New Hampshire, were suppressed.

FISHERIES⁶

Lobsters account for the majority of pounds caught and sales.



92% of New Hampshire farms are small with low sales and a few large farms account for most sales⁸



Sources: 1. USDA Economic Research Service, www.ers.usda.gov/topics/food-nutrition-assistance/food-security-in-the-us/
2. USDA Food and Nutrition Service, www.fns.usda.gov/gd/supplemental-nutrition-assistance-program-snap
3. New Hampshire Department of Agriculture, Markets & Food, www.agriculture.nh.gov/publications-forms/documents/farmers-market-directory.pdf

4, 5, 8: USDA 2012 Census of Agriculture, www.nass.usda.gov/Publications/AgCensus/2012
6: National Marine Service, <http://foss.nmfs.noaa.gov>
7: Society for the Protection of New Hampshire Forests, <http://forestsociety.org/advocacy-issue/nh-land-conservation-report>