

VERMONT FARMERS MARKET REPORT



2017



2017 REPORT

This report has been prepared by the Northeast Organic Farming Association of Vermont (NOFA-VT) and the Vermont Farmers Market Association (VTFMA), with the help of Farmers Market Consultant Darlene Wolnik, to shed light on the landscape of farmers markets in Vermont during the 2017 summer season. Farmers markets have been a pillar of Vermont communities for many years, and given their relevance to Vermont's producers and communities, it is important to take stock of their impact and operations.

Farmers markets in Vermont are independently operated, and therefore each market is unique; the size, make-up, and operating principles of markets vary widely. By collating data from markets across the state, we can both paint a picture of the broad landscape of farmers markets as well as give communities reference points to compare their own markets to.

Primarily, this report summarizes the results of two surveys conducted in early 2018 that collected information on the 2017 summer market season. NOFA-VT sent a farmers market survey to all known Vermont markets at the time, of which 38% (n=26) completed. The Vermont Agency of Agriculture, Food, and Markets (VAAFM) surveyed Vermont agricultural direct market producers to better understand the impact of specific direct market channels, including farmers markets, among other things; seventy-one producers responded.

In 2017, Vermont had 63 independently operated market organizations that hosted a total of 68 summer markets and 15 winter markets. These totals are lower than the 78 summer and 21 winter markets in 2016, though Vermont still had the most farmers markets per capita, according to Strolling of the Heifers. Of the 63 market organizations in 2017, 54 (86%) were members of the VTFMA. The last page of this report is a map and list of the 2017 VTFMA member summer markets.

Given the variable nature of Vermont's markets, they have been grouped by the total number of vendors each hosted in 2017 to enable fair comparisons of some market characteristics. Of the 26 markets that completed the farmers market survey, five were small (1-15 vendors), twelve were medium (16-35 vendors), and nine were large (36+ vendors). Given the small sample size, we report the median of some measures rather than the average. The median is the value at which 50% of the sample is below and 50% is above.





35%

of markets required vendors selling value-added products (e.g. crafts, prepared foods) to have a certain percentage of their raw materials be sourced locally. No small markets reported requiring this; a third of medium markets did and about half of large markets did.

VENDOR DETAILS

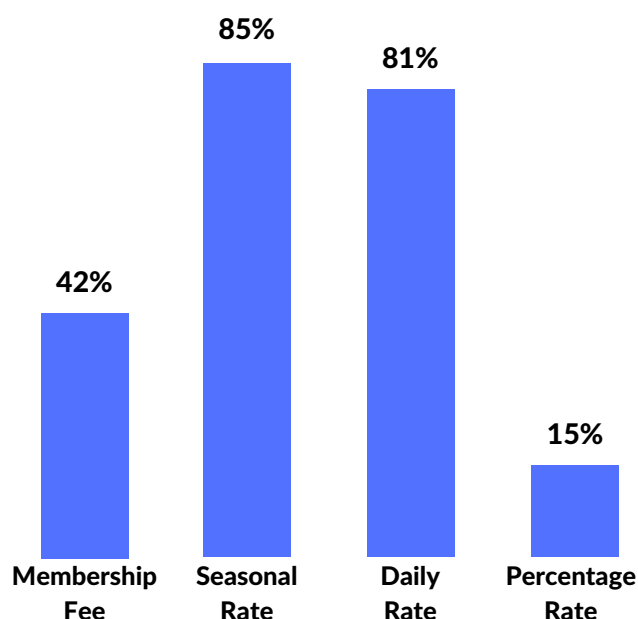
The median number of total vendors (meaning the roster of accepted vendors participating at that market at least once in 2017) for all summer markets was 29, and the median number of vendors per market day was 20. The table below shows the median number of each type of vendor by market size.

True to the spirit of farmers markets, the majority of vendors across all markets were agricultural producers. However, markets also include prepared food vendors and craft/artisan vendors to attract more customers and keep the market vibrant and diverse.

	Small Markets (n=5)	Medium Markets (n=12)	Large Markets (n=9)	All Markets (n=26)
Median total vendors per season	11	27	63	29
Median vendors per day	9	19	43	20
Median agricultural vendors per day	3	7	16	9
Median prepared food vendors per day	2	5	15	5
Median craft vendors per day	2	7	10	7

VENDOR FEES

The system for collecting vendor fees in Vermont is done through a mix of annual membership fees, a seasonal rate, a daily rate, and/or a percentage of actual reported vendor sales (known as a percentage rate fee). The graph to the left shows the proportion of markets that utilized each fee type.



The median seasonal rate was \$100 for small markets (n=3), \$138 for medium markets (n=10), and \$275 for large markets (n=6). The median daily rate was \$10 for small markets (n=3), \$15 for medium markets (n=10), and \$30 for large markets (n=6).

The largest group of markets (38%; n=10) did not charge a membership fee or calculate a percentage rate fee, and instead charged seasonal and daily rates. The second largest group (31%; n=8) had a membership fee, seasonal rates, and daily rates, but did not utilize a percentage rate fee system.

Markets reported a wide range of vendor fees collected annually from the various vendor payment types. The median total collected was \$1,270 by small markets (n=4), \$2,500 by medium markets (n=11), \$18,768 by large markets (n=9).

MARKET ACCESSIBILITY

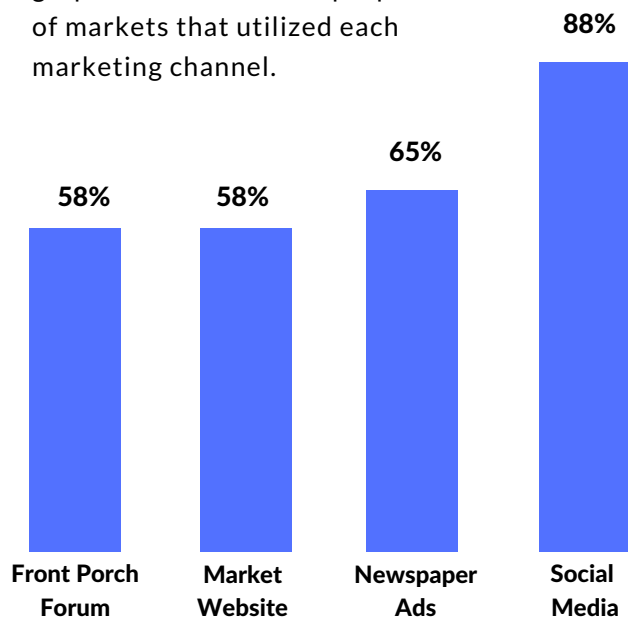
NOFA-VT supports food access programming at markets across the state. In 2017, 65% (n=44) of all summer markets and 100% (n=15) of all winter markets accepted SNAP/3SquaresVT benefits. All of these markets also participated in the Crop Cash Program, which incentivizes the use of SNAP/3SquaresVT benefits at markets by doubling the value of benefits for use on purchase of fruits and vegetables at markets.



Collectively, EBT sales brought in \$92,726 to Vermont farmers via farmers markets during the 2017 summer and 2017-2018 winter seasons. Moreover, the Crop Cash Program brought in an additional \$64,221 to farmers at farmers markets during that time.

MARKET PROMOTIONS

Markets used a variety of marketing channels to promote themselves, and the mix of channels did not vary significantly by market size. The graph below shows the proportion of markets that utilized each marketing channel.



MARKET EXPENSES

MANAGEMENT

Only sixty-two percent of markets paid their market manager, and the remaining 38% relied on volunteers to manage the market. Nearly all (78%, n=7) of the large markets compensated their market manager, just over half (58%, n=7) of medium markets did, and less than half (40%, n=2) of small markets did. Of markets that did pay managers, the median wage paid was \$13,000 for large markets, \$1,600 for medium markets, and \$1,200 for small markets.

SITE FEES

Across all markets, 62% reported paying site fees. Sixty percent (n=3) of small markets reported paying site fees, with a median fee of \$250. Forty-two percent (n=5) of medium markets reported paying site fees, with a median of \$500. All but one large market (89%, n=8) reported paying site fees, but there was more variability amongst large markets than small and medium markets. The median fee reported was \$3,475, but the average was \$7,319.

VENDOR CHARACTERISTICS

Of the 71 agricultural producers that responded to the VAAFM Vermont Direct Market Producer Survey, 55% (n=39) reported selling at one or more farmers markets in 2017. The majority of producers selling at farmers markets utilized only direct market channels, including both direct-to-consumer and direct-to-retail channels. The next largest majority relied on an average of four market channels, including both wholesale and direct market channels.

The average number of acres owned by farmers market producers was 75 acres, which is comparable to the 76 average acres owned by all direct-to-consumer producers surveyed. Fifty-nine percent of farmers market producers (n=23) sold some or all certified organic products, while 49% (n=30) of all producers (only 61 of 71 responded to this question) had either some or all of their products certified organic. On average, farmers market producers had been in business for 16 years, compared to a 27 year average for all producers.

9

average number of years producers had been selling at farmers markets

43%

of producers attended two or more farmers market per week

\$15,000

median gross sales from farmers markets, as reported by producers



GROSS SALES

Each market collects gross vendor sales data differently, and the data reported here are self-reported and unverified. For the 2017 summer market season, small markets reported median sales of \$53,186, medium markets reported median sales of \$80,100, and large markets reported median sales of \$410,621. Total gross vendor sales reported by all 26 markets was \$6,810,600.

SUPPORT FOR MARKETS

Throughout 2017, NOFA-VT supported farmers markets through a variety of grants and partnerships. A few highlights include:

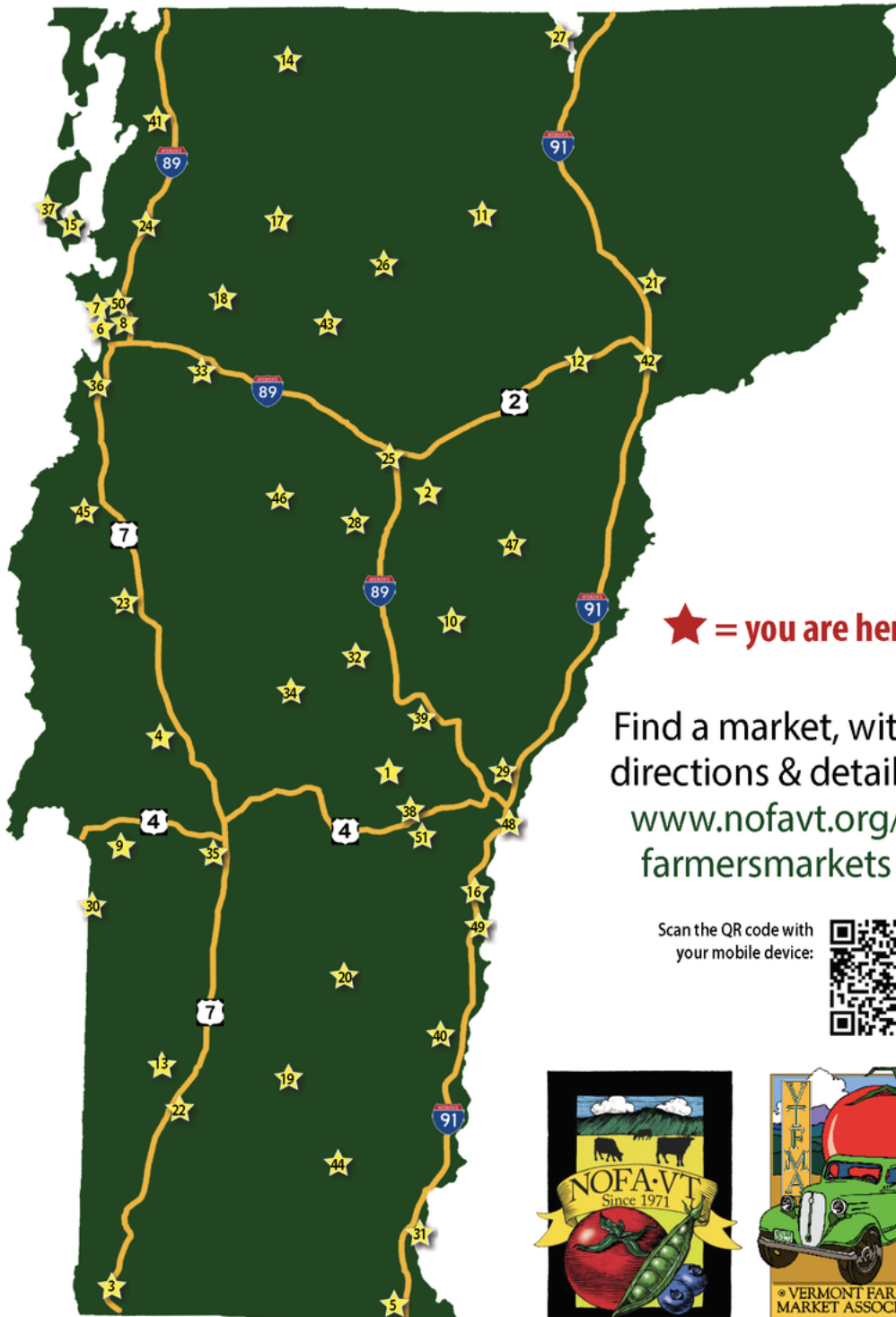
- The annual Vermont Farmers Market Conference in March was attended by 63 people, including representatives from 30 markets. This full day conference provided opportunities for markets to network with each other, learn about relevant regulations and projects, and dive into specific topics of their choice ranging from social media to food access.
- In partnership with Vermont Law School and Farmers Market Coalition, NOFA-VT finalized and prepared to launch the Farmers Market Legal Toolkit, which provides legal resources to markets around business structure, SNAP/EBT, and risk management (www.farmersmarketlegaltoolkit.org).
- NOFA-VT released two reports, “Stagnant, Saturated, or Ready to Surge?” and “Consumer Insights to Support Messaging for Vermont Direct Markets,” summarizing extensive market research conducted to better understand consumers and the future of direct markets in Vermont. Visit www.nofavt.org to find the reports.
- NOFA-VT began working with five farmers markets around the state to develop/improve data collection systems and resources in order to both support those markets directly and create replicable resources for use by all markets.
- NOFA-VT funded and administered the Crop Cash Program at every market that accepted SNAP/3SquaresVT benefits, thereby helping markets be more accessible to all customers.
- NOFA-VT continued supporting and promoting SNAP/EBT at farmers markets through technical assistance to markets and three mailings to all households in the state that received SNAP/3SquaresVT benefits.



NOFA-VT also proudly serves as the parent organization for the VTFMA, which met monthly throughout the winter of 2017 to advance the interests of farmers markets. The VTFMA promoted member markets through a variety of print and digital media channels, including large posters in most of Vermont's rest areas and Co-op grocery stores as well as multiple online directories. The VTFMA board hosted Farmers Market Awareness Day at the Vermont Statehouse in February 2017, which raised awareness of farmers market issues with state legislators. You can download a complete overview of the VTFMA's board and activities for 2016-2017 and view a current list of VTFMA member markets at www.VTFMA.org.

WHEREVER YOU ARE IN VERMONT, THERE IS A NEARBY

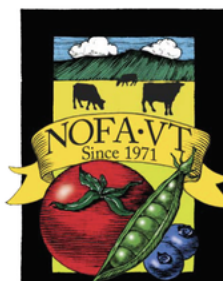
FARMERS MARKET



★ = you are here

Find a market, with
directions & details:
[www.nofavt.org/
farmersmarkets](http://www.nofavt.org/farmersmarkets)

Scan the QR code with
your mobile device:



1. **Barnard** • Thur 4:30-7:30
2. **Barre** • Wed 3-7
3. **Bennington** • Tue 3-6 & Sat 10-1
4. **Brandon** • Fri 9-2
5. **Brattleboro** • Tue 4-7 & Sat 9-2
6. **Burlington** • Sat 8:30-2
7. **Burlington (O.N.E.)** • Tue 3-6:30
8. **Burlington (UVM Med)** • Thur 2:30-5
9. **Castleton** • Thur 3:30-6
10. **Chelsea** • Fri 3-6
11. **Craftsbury** • Sat 10-1
12. **Danville** • Wed 9-1
13. **Dorset** • Sun 10-2
14. **Enosburg Falls** • Sat 9-1
15. **Grand Isle** • Sat 10-2
16. **Hartland** • Fri 4-7
17. **Jeffersonville** • Wed 4:30-8
18. **Jericho** • Thur 3-6:30
19. **Londonderry** • Sat 9-1
20. **Ludlow** • Fri 4-7
21. **Lyndonville** • Fri 3-6
22. **Manchester** • Thur 3-6
23. **Middlebury** • Wed 9-12:30 & Sat 9-12:30
24. **Milton** • Thur 4-7
25. **Montpelier** • Sat 9-1
26. **Morrisville** • Sat 9-1
27. **Newport** • Wed 9-2 & Sat 9-2
28. **Northfield** • Tue 3-6
29. **Norwich** • Sat 9-1
30. **Poultney** • Thur 9-2
31. **Putney** • Sun 11-2
32. **Randolph** • Sat 9-1
33. **Richmond** • Fri 3-6:30
34. **Rochester** • Fri 3-6
35. **Rutland** • Wed 3-6 & Sat 9-2
36. **Shelburne** • Sat 9-1
37. **South Hero** • Wed 3-6
38. **South Pomfret** • Sat 9:30-12:30
39. **South Royalton** • Thur 3-6
40. **Springfield** • Sat 10-1
41. **St. Albans** • Sat 9-2
42. **St. Johnsbury** • Sat 9-2
43. **Stowe** • Sun 10:30-3
44. **Townshend** • Fri 4-7
45. **Vergennes** • Thur 4-7:30
46. **Waitsfield** • Sat 9-1
47. **West Topsham** • Sun 11-3
48. **White River Jct.** • Thurs 11-6
49. **Windsor** • Sat 11-2
50. **Winooski** • Sun 10-2
51. **Woodstock** • Wed 3-6