Findings of the 2025 National Food Hub Survey

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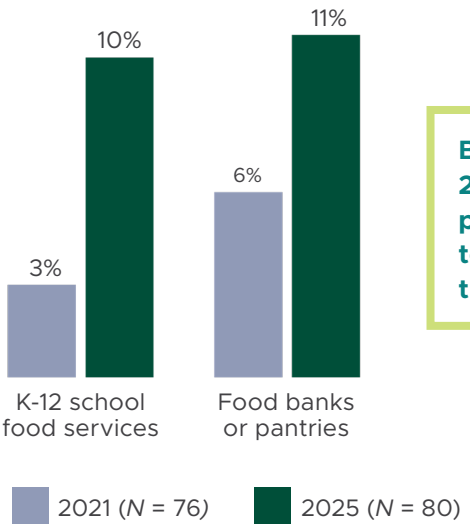
Executive Summary

Local and regional food systems are a complex network of businesses and people that connect locally produced foods to consumers and provide communities with control over their food supply. Food hubs are a vital market channel within local and regional food systems that improve community food access, strengthen local economies, promote public health, and foster environmental resilience.

1 STATE OF THE FOOD HUB SECTOR

- **Farm-to-institution incentive and technical assistance programs helped drive increased food hub sales of local food to food banks and schools between 2021 and 2025**. During this time, the average percentage of sales to schools more than tripled, and the average percentage of sales to food banks nearly doubled.
- The 2025 National Food Hub Survey represented proportionally fewer organizations (3%) that were less than 2 years old than any previous survey (between 18% and 20% in the last three surveys).
- **Fresh produce and herbs has consistently been the dominant product category, comprising half or more of total food hub sales.** Eggs, meat and poultry, dairy products, value-added products, and grains and beans were also in the top five for proportion of food hubs with sales by category.

Figure 1. **Average Percentage of Total Gross Sales for K–12 Schools and Food Banks**

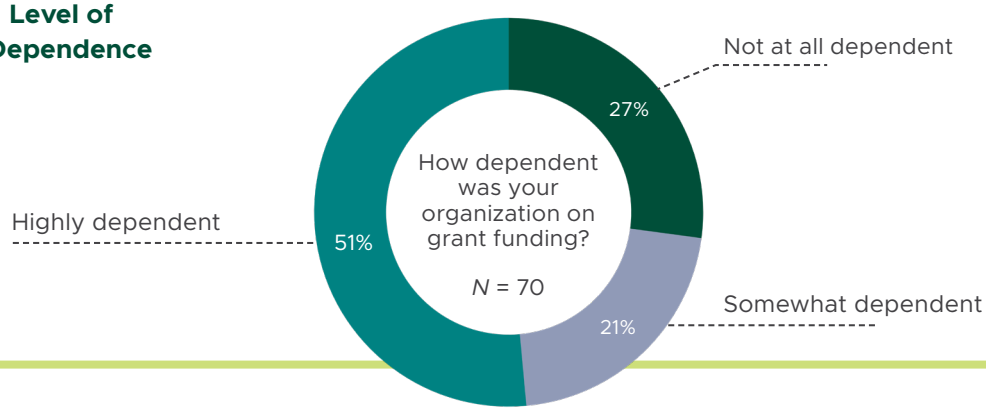


Between 2021 and 2025, the average percentage of sales to schools more than tripled.

2 FINANCIAL LANDSCAPE

- Food hubs' dependence on grant funding has increased over time. **In 2025, more than half of hubs reported they were highly dependent on grant funding**, the largest proportion seen in the 6 years of the survey.

Figure 2. **Level of Grant Dependence**



- Federal- and state-funded programs were the dominant sources that institutions, such as schools and hospitals, used to purchase from food hubs.
- Food hubs' top two concerns related to the financial landscape were **decreased availability and uncertainty of federal funding,** as well as **increased operating costs and profitability pressures.**

3 FOOD HUBS AS MISSION-DRIVEN ORGANIZATIONS

Food hubs' commitment to strengthening food systems and supporting the farms and families they serve is evident in their top values:

local food sourcing

farmer viability

regional food systems resilience

access to healthy food for consumers

4 FOOD HUB TECHNICAL ASSISTANCE AND NETWORK NEEDS

More than half of **food hubs are looking for technical assistance** on capital access and market development.

"The Local Food Purchase Assistance program was a game changer on so many levels. Combining support for small family farms while increasing access and all while creating local networks that worked together locally, regionally, and nationally. Forging the introductions to school nutrition directors in rural areas opened the doors to relationships that had not formed before and constructed the infrastructure for school cafeterias to source locally."

— FOOD HUB SURVEY COMMENT

5 INSTITUTIONAL SALES

- While close to two-thirds of hubs (65%) were selling to schools, food banks, or both, 54% of hubs selling to schools and 49% of hubs selling to food banks and pantries identified that price points are not competitive.
- For sales to schools, limited processing capacity was the second most common barrier, with upwards of 40% of hubs reporting this challenge. **Twenty-eight of the 98 hubs said both price points and processing equipment were barriers in selling to schools.**
- Other top five barriers in selling to schools were challenges in navigating the procurement process, a lack of relationship with the purchaser, and not enough product to meet the demand.

65%

of food hubs sold to schools, food banks, or both

6 MARKET SHIFTS AND OUTLOOK

Hubs are optimistic about the market opportunities ahead: **The proportion of hubs expecting increased sales exceeded the proportion expecting decreased sales for all 12 listed market channels.**

Introduction

WHY FOOD HUBS?

The local and regional food systems are complex networks of businesses and people that enable locally produced foods to be accessed by consumers. These systems can provide communities with control over their food supply and form part of public food system infrastructure. Food hubs are a vital market channel within the local and regional food systems that improve community food access, strengthen local economies, promote public health, and foster environmental resilience.

At the height of the COVID-19 pandemic when the global food supply was disrupted, communities with established local and regional food markets were able to access food and support local businesses. This provided food security and demonstrated the importance of local and regional food systems as a source of community resilience. Continuing to build resilience in local food systems builds food security in the long term.

Food hubs connect food buyers and sellers and enable communities across the United States to access food that is produced in their region.

Food hubs are a vital market channel within local and regional food systems. Food hubs connect food buyers and sellers and enable communities across the United States to access food that is produced in their region. The MSU Center for Regional Food Systems (CRFS) defines food hubs as “businesses or organizations that manage the aggregation, distribution, and marketing of source-identified food products,” though some businesses that play these roles describe themselves in other ways. Regardless, food hubs are an important means of scaling the movement of local food, and many food hubs provide a model for socially conscious business.

WHY SURVEY FOOD HUBS?

Since 2012, CRFS has led the National Food Hub Survey research project. The survey, along with a growing body of other food hub literature,[1] provides insights into the U.S. food hub sector, helping to inform public policy and program development.

The 2025 National Food Hub Survey, which documents food hub experiences during the 2024 calendar year, is the sixth survey in this longitudinal research project and sheds light on the evolution of the food hub landscape and it's contributions to food systems infrastructure over the last 12 years.

While the previous five surveys were every other year, CRFS made the decision to extend the timeline between surveys in this round. This was for several reasons, including:

- **to reduce the burden on food hubs** completing the survey;
- **due to the complexity of the value chain procurement environment,** to allow CRFS more time between surveys to process and use the data more effectively so that the impact of the data can be more fully understood and used.

The W.K. Kellogg Foundation has generously supported this and previous food hub surveys.

WHO DOES THE SURVEY REPRESENT?

CRFS invited food hubs to complete the survey through a series of online channels. The invitation was promoted on the MSU CRFS website, through multiple social media posts, listservs for national and regional food systems and food hubs, and targeted email invitations.

100

organizations from 27 states responded to the survey

One hundred organizations from 27 states and the District of Columbia responded to the survey. This response total is similar to most previous survey years. There are a few distinguishing characteristics of the 2025 sample. First, with 33 responding food hubs, Michigan-based organizations are overrepresented in data, largely due to promotion through the Michigan Food Hub Network. Second, in comparison with other survey years, the 2025 survey sample had fewer newly established food hubs and more small-scale food hubs with annual gross revenue of $100,000 or less.

For details on the survey methodology, see Appendix A.

1 Conner, D., Whitehouse, C., Joffray, L., Graziani, M., Edwards-Orr, L., Bielaczyc, N. (2025). *Many Hats: A Food Hub Operator's Toolkit*. Local Food Economics, University of Vermont Center for Rural Studies. https://localfoodeconomics.com/many-hats/

SURVEY CONTEXT

Compared to the last food hub survey, which captured food hub operations in 2020, the year the COVID-19 pandemic began, the U.S. economy has changed substantially. In 2020, many hubs abruptly pivoted from wholesale to direct-sales models. New funding opportunities and federal COVID-19-related programs helped some hubs launch or expand their operations while others suspended operations or closed permanently. Since then, the U.S. economy has seen dramatic decreases in the unemployment rate[2] and increases in wages[3] and in gross domestic product.[4] Inflation rates increased dramatically in 2021[5] but have decreased since; however, they still remain significantly higher than pre-pandemic levels.

Food hubs completed the survey between February and April 2025 following a change in the U.S. presidential administration. Though the 2025 National Food Hub Survey primarily captured how businesses operated in the 2024 calendar year, there were policy changes and decisions in the spring of 2025 that may have influenced food hubs' responses at the time of survey completion.

These changes included:

- **The cancellation of more than $1 billion in funds appropriated for the 2026 Local Food for Schools Cooperative Agreement Program and the 2026 Local Food Purchase Assistance Cooperative Agreement Program.** These programs, previously funded by the U.S. Department of Agriculture, provided schools, childcare facilities, and food banks with funding to purchase food from local farmers, including by sourcing through food hubs.
- **A rise in the average U.S. tariff rate from 2.5% to 27%.**[6] Although food hubs, by nature, are more insulated from disruptions in international trade than most businesses, products like packaging materials, cold storage equipment, and food processing equipment may be manufactured outside the United States.

↓ 1 billion

in funding cuts for local food procurement programs, including sourcing through food hubs

2 U.S. Bureau of Labor Statistics. "Civilian unemployment rate." https://www.bls.gov/charts/employment-situation/civilian-unemployment-rate.htm

3 Bahr, K. (2024). "Economic Performance: 2017–2024." University of Wisconsin Stevens Point. College of Professional Studies Blog. https://blog.uwsp.edu/cps/2024/05/10/economic-performance-2017-2024/

4 Statista (2025). "Gross domestic product of the United States from 1990 to 2024." https://www.statista.com/statistics/188105/annual-gdp-of-the-united-states-since-1990/

5 US Inflation Calculator. "Current US Inflation Rates: 2000–2025." https://www.usinflationcalculator.com/inflation/current-inflation-rates/

6 Irwin, N. (June 5, 2025). "Trump's incredibly volatile tariff landscape, in one chart." Axios. https://www.axios.com/2025/06/05/trump-tariff-rate-volatility

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NOTES

Organizations in the food hub sector refer to themselves in many ways. Throughout the report, we use the terms "organizations," "food hub organizations," "food hubs," and "hubs" interchangeably.

Although this report makes comparisons between survey years, these comparisons should be interpreted cautiously because each survey year represents a different set of respondents. This means that the differences in a given year could be attributed to different types of organizations responding rather than change in the sector.

PART 1

State of the Food Hub Sector

YEARS IN OPERATION

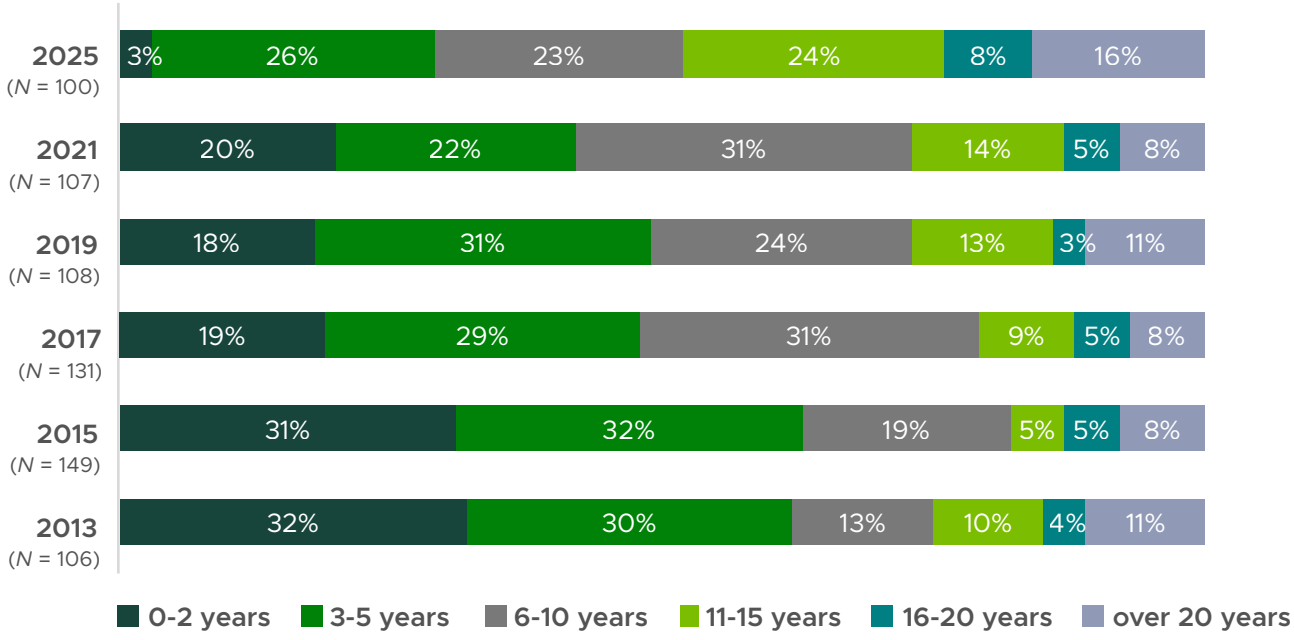
The 2025 National Food Hub Survey showed proportionally fewer organizations entering the food hub sector than any previous survey. The 3% of food hubs in operation for 2 years or less represents a dramatic drop from the nearly 20% of hubs in this age range seen consistently in the three preceding surveys. The hubs responding in 2025 were in operation for between 1 and 135 years, with an average of 15 years compared to an average of 10 years in operation in 2021.

17%

The number of responding food hubs in operation for 2 years or less dropped from 20% to 3%

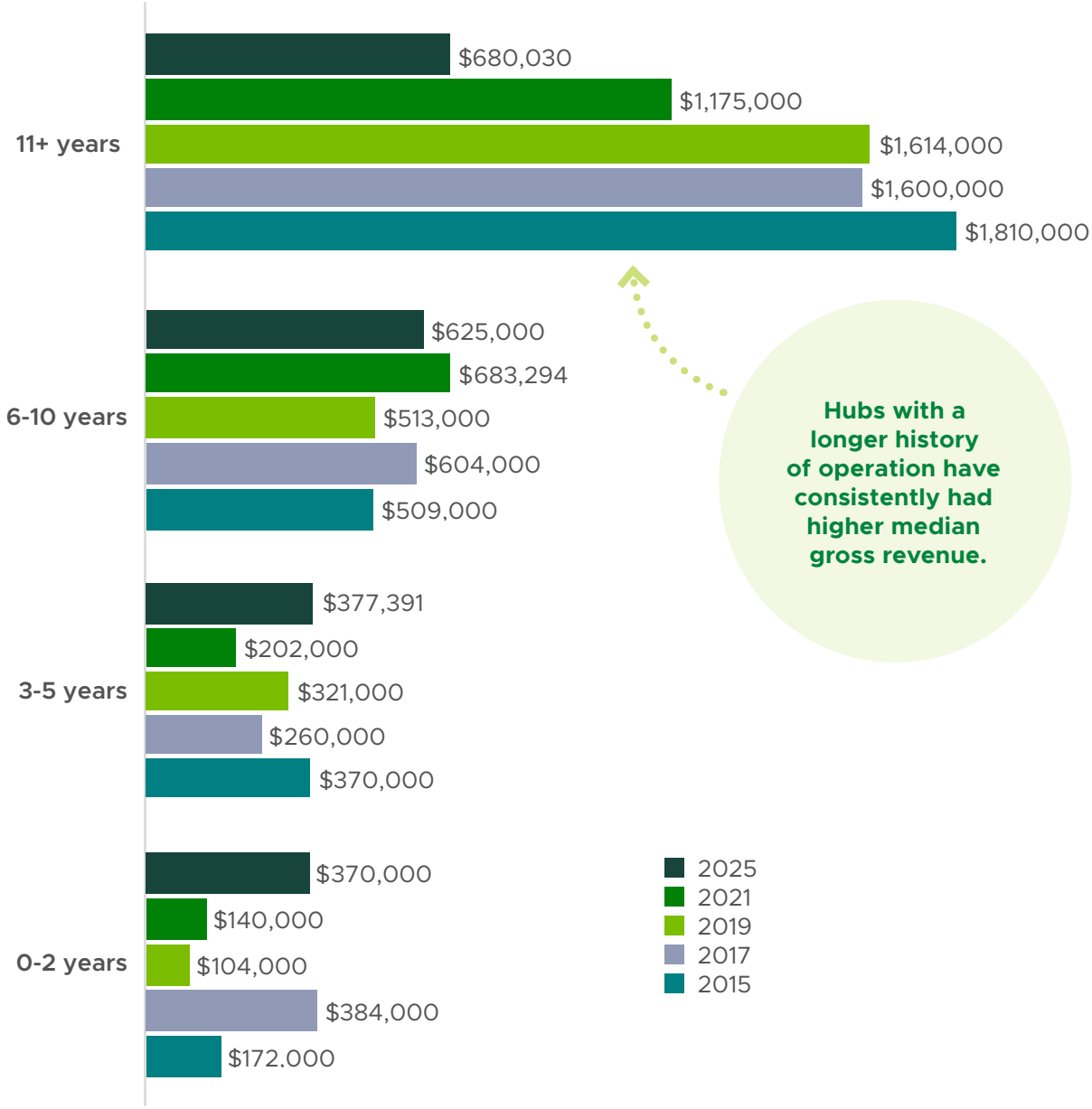
While the differences between survey years could reflect changes in the sample composition, the lower prevalence of emerging food hubs could also reflect the change in market channels during and after the COVID-19 pandemic. Although the years following the pandemic onset brought greater demand and new market opportunities for many food hubs, these years also saw substantial upheaval and uncertainty in markets and supply chains, which may have discouraged new hubs from forming. At the same time, the greater prevalence of food hubs in operation for 11 or more years could also reflect a maturing sector more broadly.

Figure 1. **Percentage of Organizations by Years in Operation**



As Figure 2 shows, hubs with a longer history of operation have consistently had higher median gross revenue. Hubs in operation for 11 or more years have had gross revenues between $680,000 and $1.8 million compared to hubs in operation for 2 or fewer years, which have had a median gross revenue under $400,000 in all five of the most recent surveys. In other words, most hubs that stay in business scale up their operations over time.

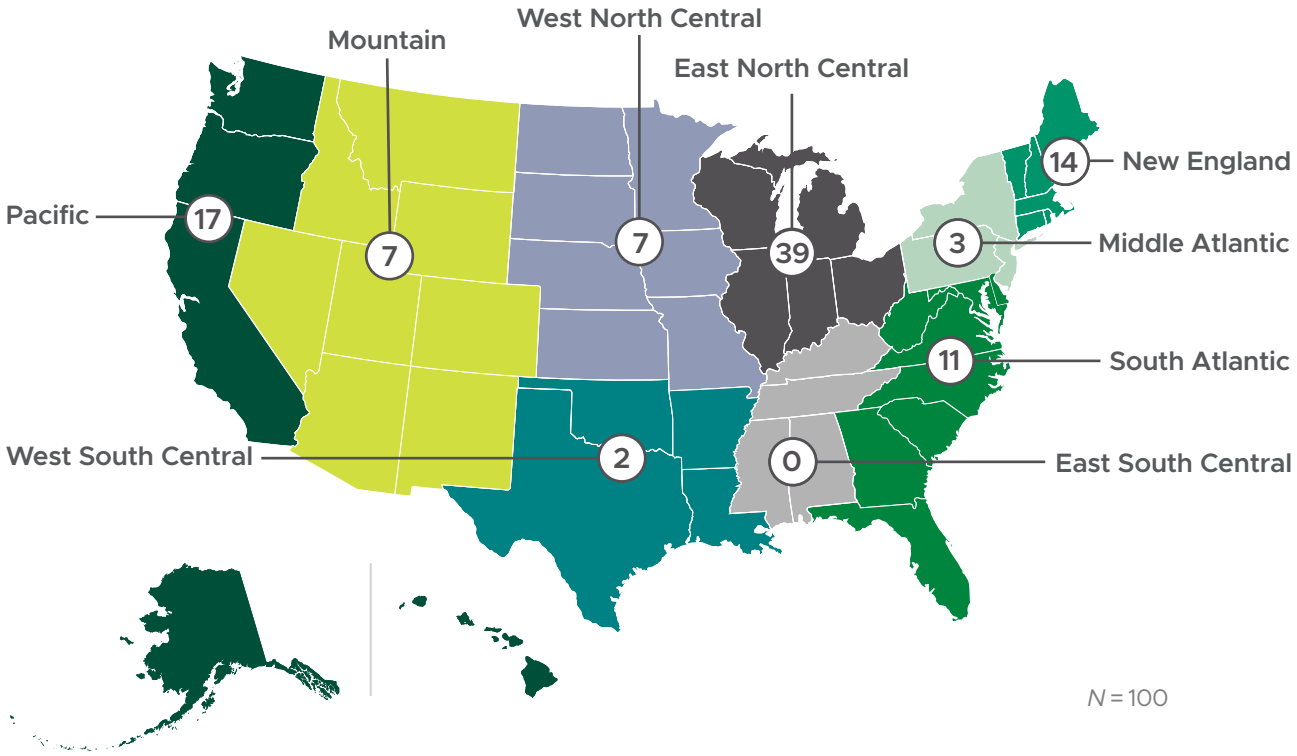
Figure 2. **Median Gross Revenue by Survey Year and Organization Age (Years in Operation)**



GEOGRAPHIC LOCATION

Consistent with the 2021 survey, the East North Central and Pacific regions of the United States were most strongly represented in the survey (Figure 3). Promoting the 2025 National Food Hub Survey through food hub network coordinators may have contributed to the relative overrepresentation of these regions in the survey sample. The consistent regional underrepresentation in the southern United States reflects the low number of food hubs in these states.

Figure 3. **Number of Organizations by Region**

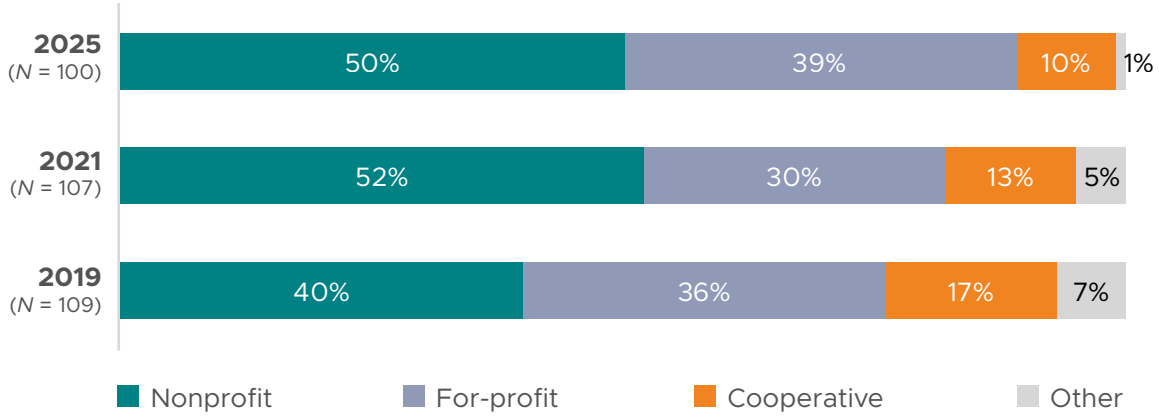


LEGAL STATUS AND BUSINESS MODEL

Figure 4 shows the distribution of organizations by legal status for the 2025, 2021, and 2019 surveys. For-profit organizations included LLCs, L3Cs, and S, C, and B Corps. Cooperatives included producer, producer-consumer, and publicly owned organizations.

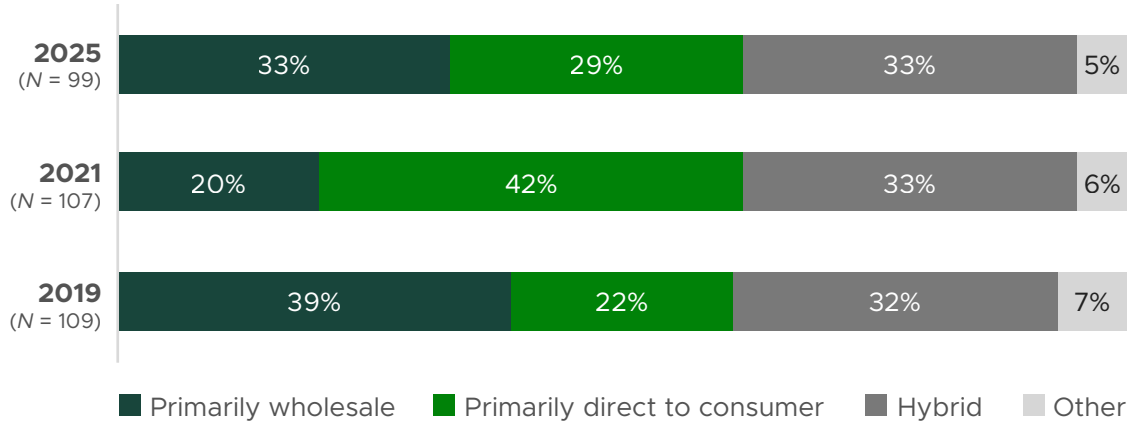
After an increase between 2019 and 2021, the proportion of nonprofit organizations was similar in 2025 to the previous survey. The rise of for-profit models could suggest some food hubs are seeking more flexibility in how they finance and operate, although the survey did not request data to support this hypothesis. The previous three surveys appear to show a trend toward proportionally fewer cooperative organizations.

Figure 4. **Percentage of Organizations by Legal Status**



The 2025 National Food Hub Survey showed a return to a more even split between business models after the push toward direct-to-consumer markets during the COVID-19 pandemic. Although the data is not shown, we note that for-profit organizations were most likely to have a hybrid business model whereas cooperatives were least likely to have a hybrid business model. The nonprofit organizations were the most evenly distributed between business models, with a slightly larger proportion operating a primarily wholesale distribution model.

Figure 5. **Percentage of Organizations by Business Model**

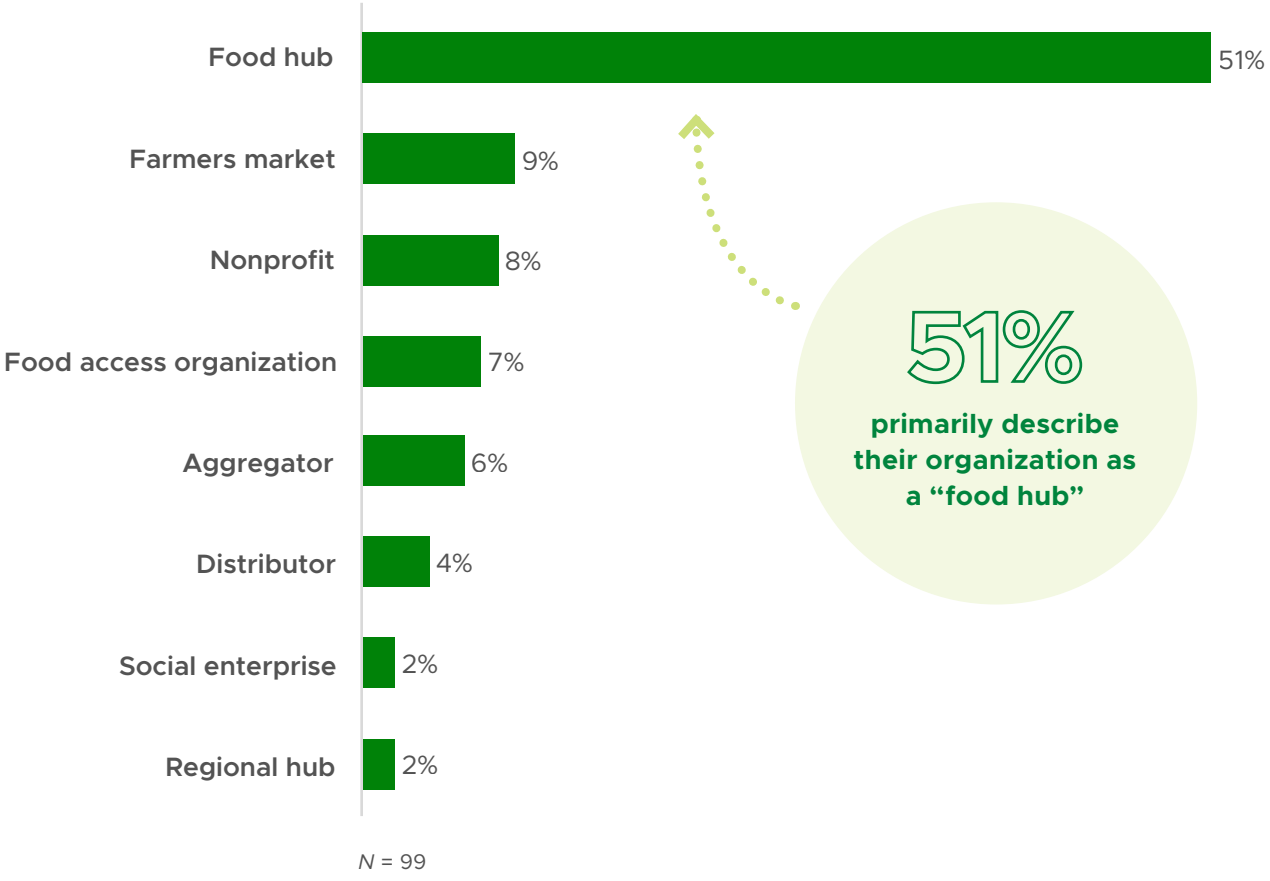


> "Our food hub operated a large direct-to-consumer program that included home delivery and ultimately could not outrun the competition of delivered groceries or corporate CSA boxes. We closed our retail operation in March 2023 to focus more on our wholesale, vendor services, and food access programming. Since then, we've seen growth in both the need for free food and our sales. Capacity has to be the largest barrier we face—in wholesale, we have enough food to sell and markets to sell to but not enough labor to deliver it all. For food access, we don't have enough money to be as dependable as a program as we'd like."

ORGANIZATION TERMINOLOGY

The 2025 National Food Hub Survey asked respondents to indicate the term they used most often to describe their organization. **"Food hub" was the most frequently selected term, but only about half of respondents chose this term, indicating a wide variety in the terms organizations use for their operations.** In 2021, 80% of respondents said they refer to their organization as "food hub" at least some of the time, and 52% of respondents said they used the term "food hub" all of the time, comparable to the proportion using "food hub" most frequently in 2025. In addition to the terms listed in the survey, organizations wrote in eight other terms: cooperative, CSA, farm, farm stand or farm stop, food club, food processor, and mercantile.

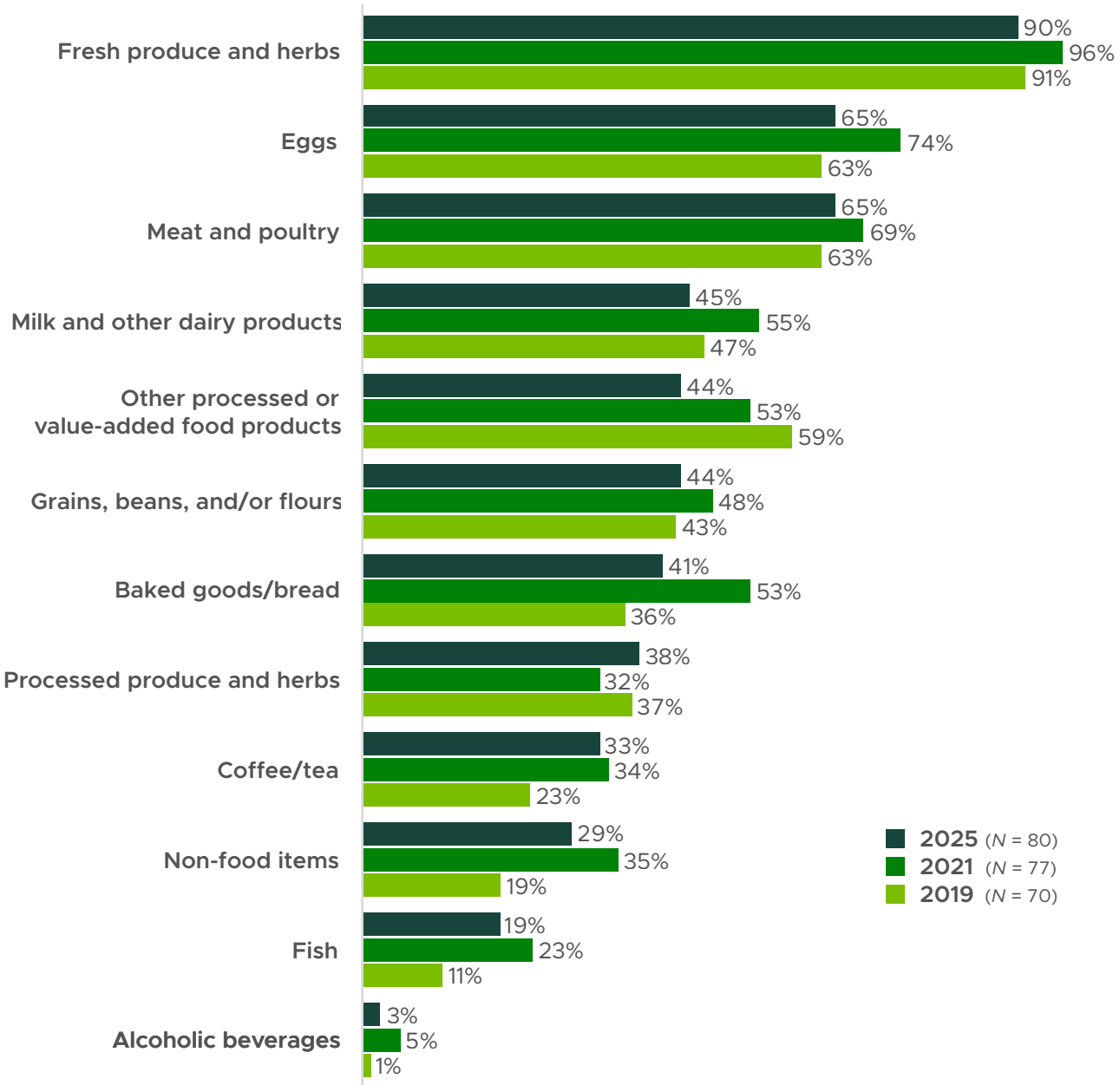
Figure 6. **Term Used Most Often to Describe Organizations**



TYPES OF PRODUCTS SOLD

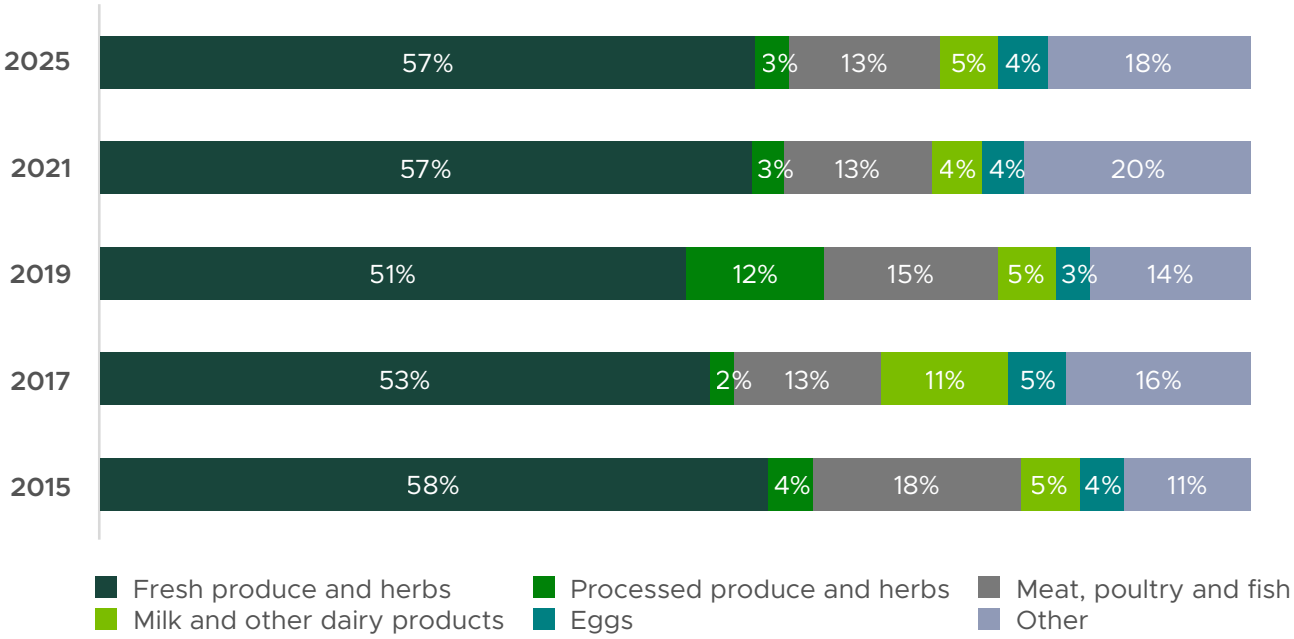
In 2025, the percentage of organizations reporting sales of specific product types was lower for all but one of the listed products (processed produce and herbs) compared to 2021. In 2025, food hubs carried an average of five product types (range of one to 13), equivalent to the average in 2019 and just under the average of six in 2021. Although there appears to be a consistent trend toward fewer hubs selling value-added products outside of produce and baked goods, the proportion of hubs selling other product types has fluctuated modestly over time.

Figure 7. **Percentage of Organizations Carrying Each Product Type**



Looking at broader product categories as a percentage of overall sales, the 2025 figures were nearly identical to the 2021 figures (Figure 8). Fresh produce and herbs has consistently been the dominant product item, comprising half or more of total food hub sales. In this figure, the "other" category includes both product types listed on the survey (baked goods and bread; grains, beans, and flours; nonfood items; coffee and tea; alcoholic beverages; and other processed or value-added food products) and write-in responses, such as flowers, honey, nuts, tofu, sweeteners, mushrooms, and pet food.

Figure 8. **Total Organization Sales as a Percentage of a Dollar by Product Category**



SALES BY CUSTOMER TYPE

Looking at the percentage of gross sales by customer type alongside food hubs' comments shows an industry in flux following the COVID-19 pandemic. After sharp drops in average percentages sold to institutions in 2021, which reflected the closure of many schools, restaurants, childcare facilities and other buildings, some institutional sales have rebounded while others have not.

In 2025, the average percentage of sales were greater for schools, food banks and pantries, and colleges than in 2021.

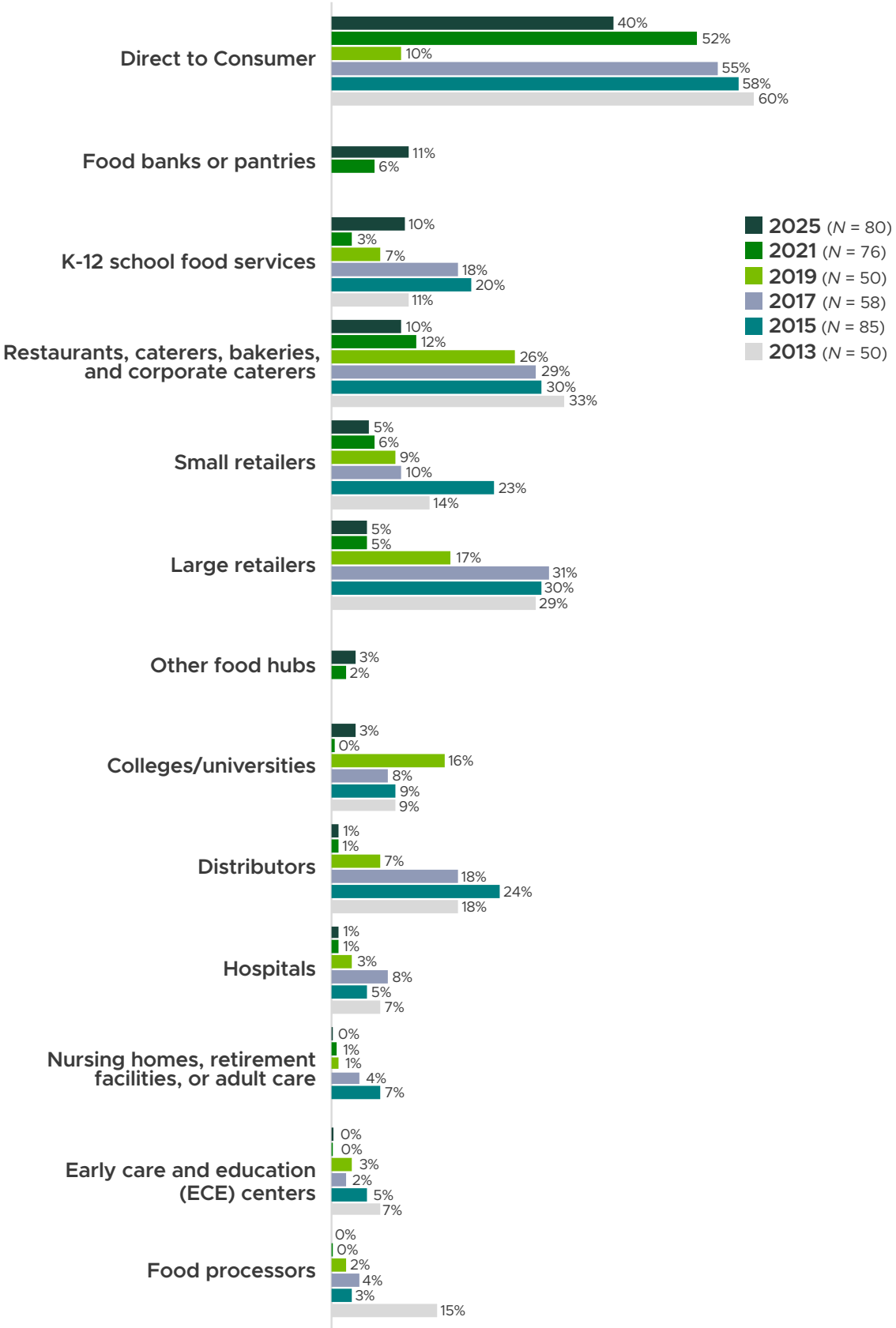
During this time, the average percentage of sales to schools more than tripled, and the average percentage of sales to food banks nearly doubled. Perhaps more importantly for comparison, there was also an increase in school sales compared to 2019, prior to the influence of the pandemic. This increase in sales and food banks could reflect the Local Food Purchasing Incentive and technical assistance programs that were available to support farm-to-institution and food pantry programs during this time.

It is also possible that higher utilization of food banks in 2024[7] helped drive increases in food hubs' sales to these channels. National school lunch spending was also higher in 2024 than in 2020, both because of pandemic-related closures in 2020 and the adoption of universal free school meals in many places following the return to in-person instruction.[8] Sales to restaurants, retailers, distributors, adult care facilities, early childhood education, and food processors remained similar to 2021 levels. The average percentage of sales to consumers fell but was considerably higher than in 2019. Fewer hubs sold direct to consumers in the 2025 survey sample. Examples of business that sell direct to consumers include: online grocery, buying club, or co-op; multi-producer CSA, mobile markets, etc.

7 Rachidi, A. and O'Rourke, T. (2024) "Exploring Trends in Food Bank Use." Center of Opportunity and Social Mobility Commentary. https://cosm.aei.org/exploring-trends-in-food-bank-use/

8 Toossi, S., Todd, J. E., Guthrie, J., & Ollinger, M. (2024). *The National School Lunch Program: Background, Trends, and Issues.* USDA Economic Research Service. https://ers.usda.gov/sites/default/files/_laserfiche/publications/110126/EIB-279.pdf

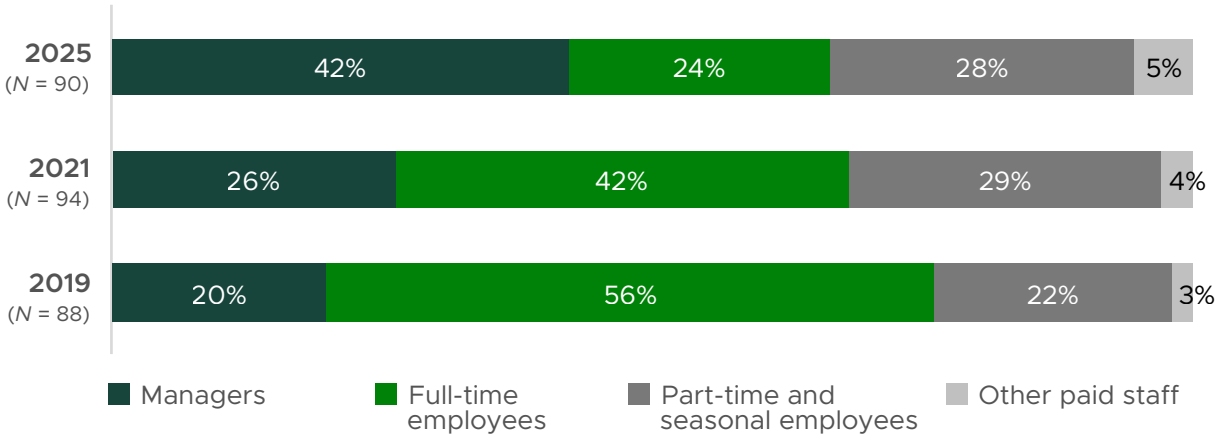
Figure 9. Average Percentage of Total Gross Sales by Customer Type



EMPLOYEES

Food hubs reported an average of 14 employees (median of seven), with a range from one to 319. This average is larger than in 2021 (12) and closer to the range of 15 to 17 in earlier surveys. Eleven organizations had a single employee, and only one organization had more than 100 employees.

Figure 10. **Percentage of Employees by Type**



Although the mean number of employees gradually increased with organization maturity, the relationship was inconsistent, and the number of employees varied widely across all categories of organization age. Four organizations in operation for more than 10 years operated with a single employee. The increase in the number of employees was more consistent in relation to annual gross revenue (data not shown).

As shown in Figures 11 and 12, women and People of Color are contributing substantially to the food hub workforce. Both groups comprise more than half of the full-time employees.

Figure 11. **Representation of Women Among Board Members and Employees**

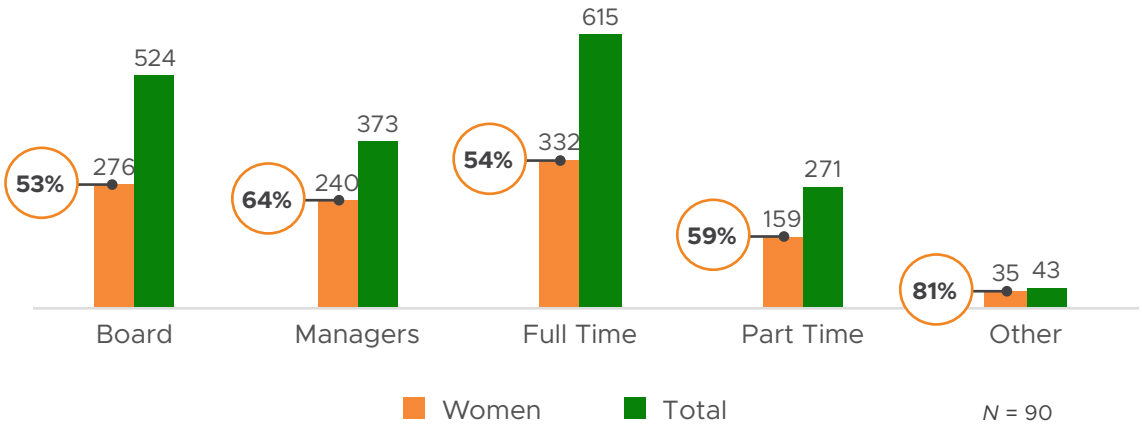
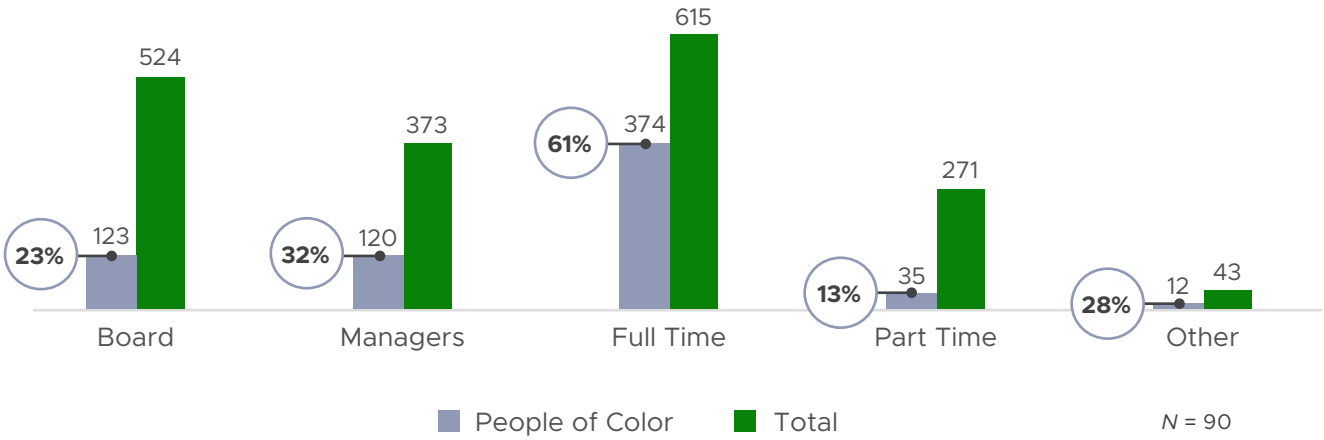


Figure 12. **Representation of People of Color Among Board Members and Employees**



PART 2

Financial Landscape

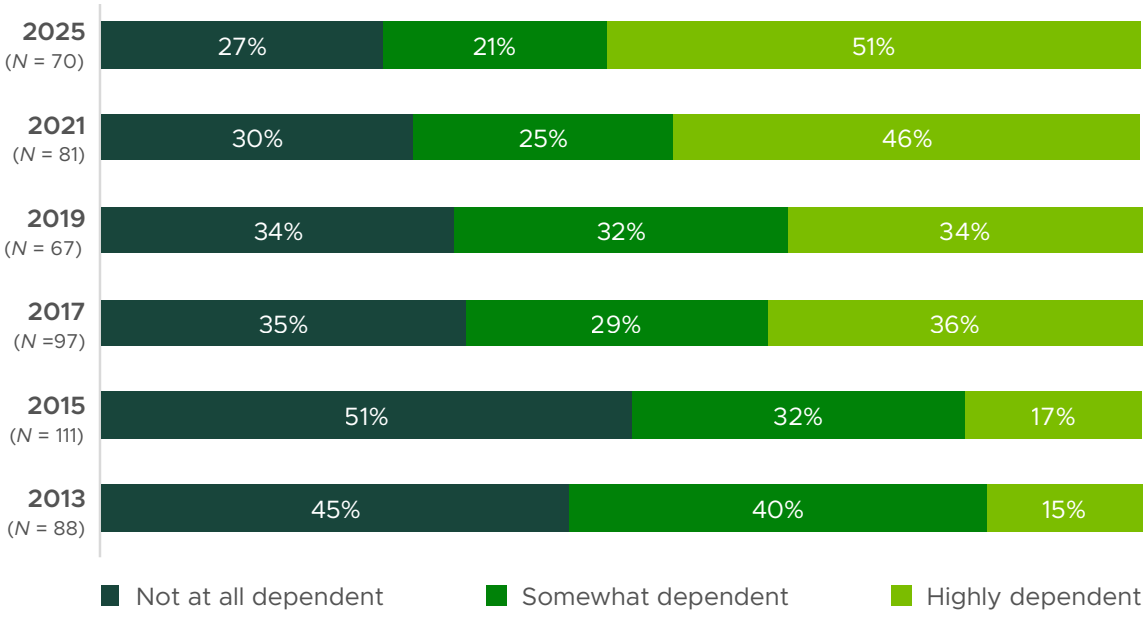
In this section, we look at two topics of concern within the financial landscape for food hubs. First, grant dependence has increased. Second, food hubs are facing increasing economic pressure.

Reliance on grants has increased over time.

Figure 13 shows a trend toward increasing reliance on grant funding over time. In 2025, more than half of hubs reported they were highly dependent on grant funding, the largest proportion seen in the 6 years of the survey. The greater reliance on grant funding in the two most recent survey years likely reflects the large volume of federal programs and private grants supporting regional food during this period. For example, many food hubs took advantage of the Local Food for Schools and the Local Food Purchase Assistance Cooperative Agreement programs created between 2021 and 2022 to supply schools and food banks, respectively. With cancellation of these programs in March 2025, hubs risk losing a key market channel. In 2025, 65% of hubs reported selling to at least one of these channels (K–12 schools and food banks and pantries) in the preceding year.

In 2025, more than half of hubs reported they were highly dependent on grant funding, the largest proportion seen in the 6 years of the survey.

Figure 13. **Level of Dependence on Grant Funding**



Food hubs' comments show how grant funded programs helped facilitate new relationships with both buyers and farm suppliers. Their comments also show that the decrease in funding availability and uncertainty surrounding federal programs is the top concern currently facing the food hub sector.

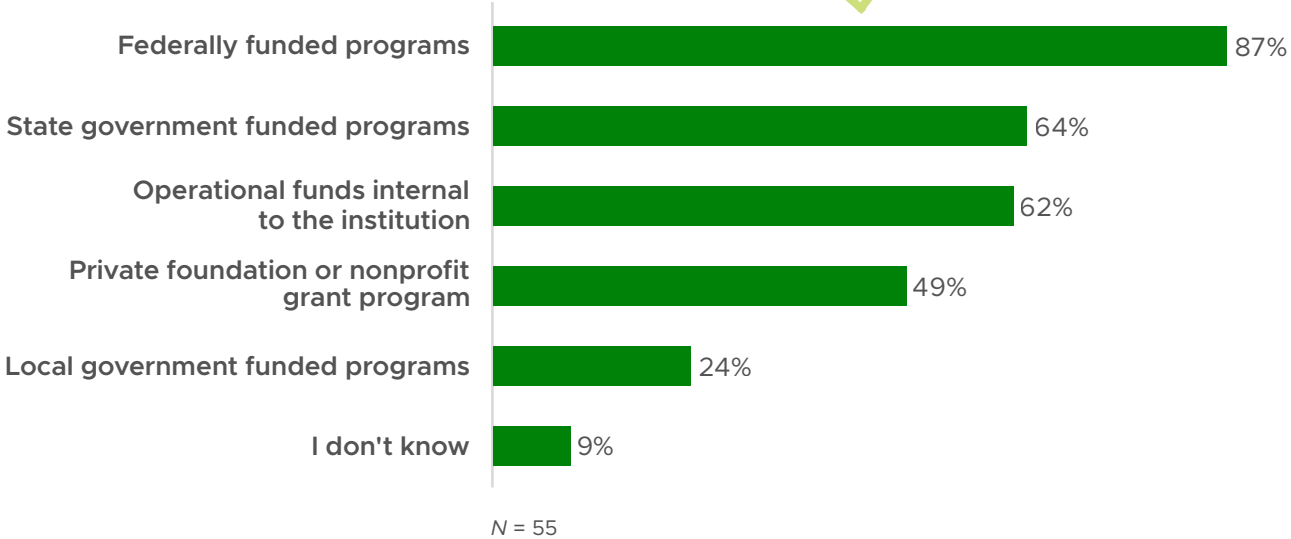
> "The Local Food Purchase Assistance program was a game changer on so many levels. Combining support for small family farms while increasing access and all while creating local networks that worked together locally, regionally, and nationally. Forging the introductions to school nutrition directors in rural areas opened the doors to relationships that had not formed before and constructed the infrastructure for school cafeterias to source locally."

> "In the past few years, federal government programs helped us expand opportunities for our farmers and also helped us feed our communities. These programs are now over, and we will not be able to sell as much produce from local farmers. We are concerned about the impact this is going to have on our local farmers as well the communities who were receiving the local product."

The hubs that indicated sales to one or more institution types were asked to share the funding sources these institutions used in 2025 to purchase their products. **Figure 14 shows that federally funded programs were the dominant funding source** followed by state-government funding, reinforcing the vulnerability of hub-to-institution sales in the face of funding cuts.

87%
of institutions use federal funds to buy from hubs

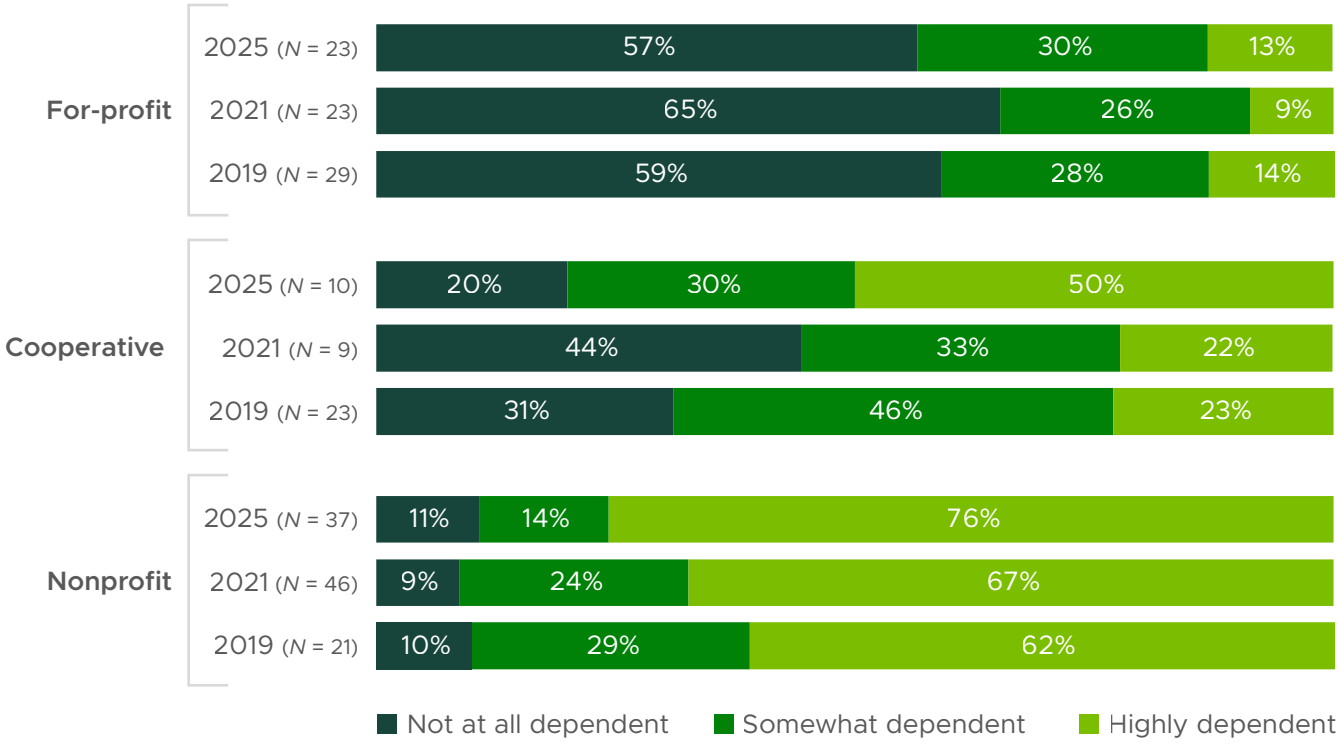
Figure 14. Funding Sources Used by Institutions to Purchase from Food Hubs



N = 55

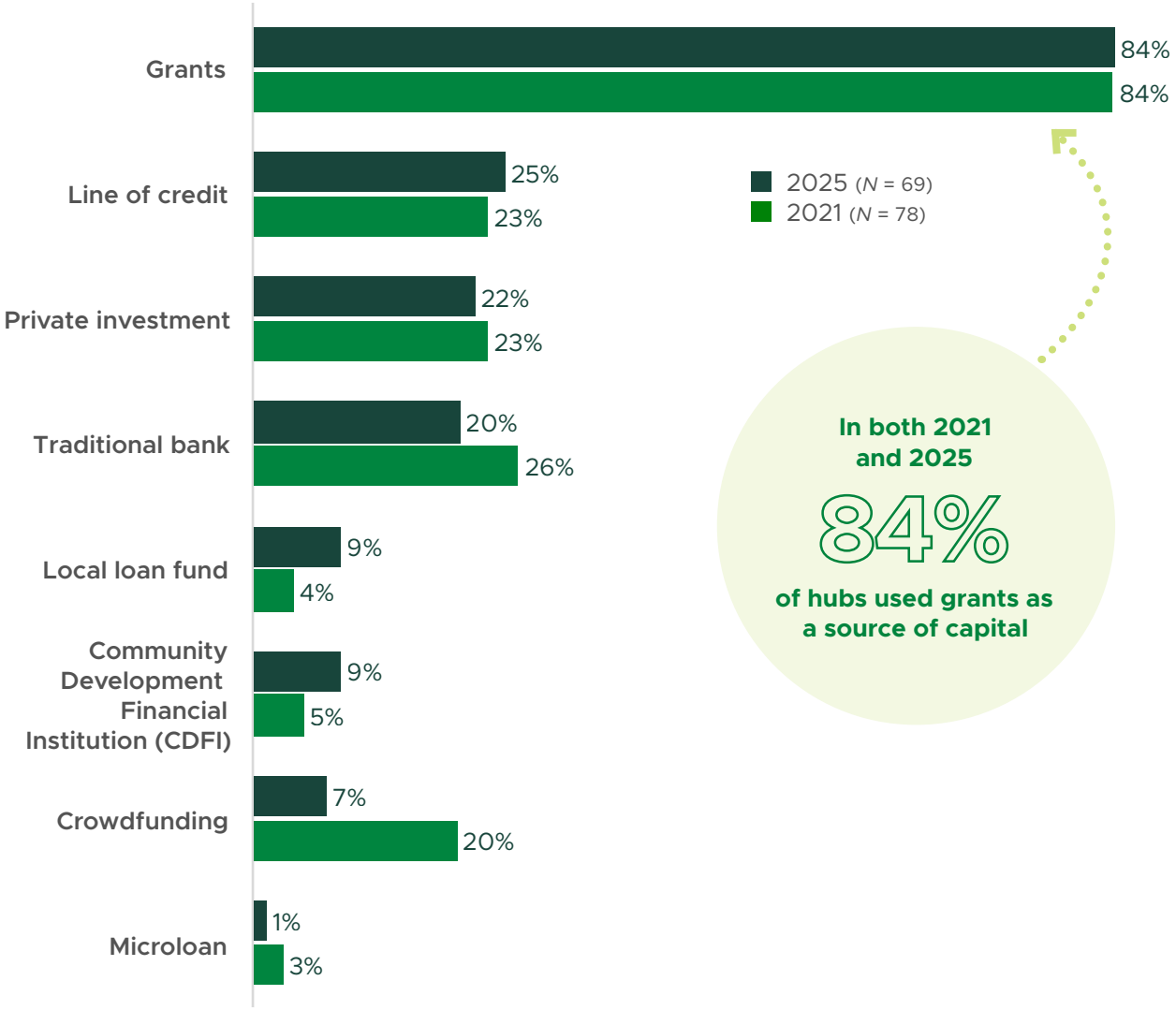
Looking at grant dependence by legal status shows that the trend in increased reliance is most consistent for nonprofit organizations. While there were few cooperatives in the respondent sample, the proportion reporting high dependence on grants in 2025 was more than twice the proportion in 2021. This high level of grant dependence by cooperatives paired with the ongoing decline of cooperatives in the survey sample could indicate greater vulnerability of this type of food hub organization.

Figure 15. **Level of Dependence on Grant Funding by Legal Status**



Another way to see food hubs' reliance on grants is looking at the sources of capital accessed during the preceding two survey years, as shown in Figure 16. **In 2021 and 2025, grants were by far the most common source of capital**, indicating the importance of grants in facilitating food hubs' efforts to scale up and build capacity. It should be noted that food hubs receive both private and public funding and this question did not differentiate between grant sources used by food hubs. The prevalence of grant funding reveals the potential for instability in the sector following changes in grant availability. Better understanding the models of the food hubs that have little or no grant dependence may be an important future study.

Figure 16. **Percentage of Organizations' Access to Sources of Capital**



Food hubs operate at low margins and face increasing economic pressure.

Many of the hubs responding to the 2025 National Food Hub Survey expressed concern over operating costs and their ability to price products competitively and profitably.

> "Inflation has been hurting our costs and also hurting the ability of end-use customers to buy more local and regional products."

> "Post COVID has impacted our CSA growth. We have had minimal growth since then. We can't afford to pay staff with our 20% margin, but folks have a hard time paying our prices and I fear we would lose more folks if we increased our prices."

> "The continued consolidation in mainstream distributors has resulted in continued downward pressure on prices, which is hard for us to compete with. They often sell products to our customers for less than we buy the products from producers. Something is off there!"

Overall, there has been an increase in hubs' median gross revenue over time.[9] A 2018 report found that the gross revenue required for food hub viability was at or above $566,000, depending on the food hub model.[10] In our 2025 survey, 30 of 41 food hubs (73%) reported breaking even or better. This proportion is lower than 2021 (91%) but higher than 2019 and 2017, when the proportion was about two-thirds.

Even though most food hubs with complete financial data indicated breaking even, 44% of hubs had an operating expense ratio (OER) between 0.95 and 1.05. In other words, their expenses were nearly even with their revenue. Only eight food hubs had an OER below 0.8, considered the upper end of an ideal OER for farm businesses.[11] For comparison, the average OER for Illinois farms ranged from 0.52 to 0.81 between 2004 and 2023.[12] Without a comfortable margin between expenses and revenue, hubs are not able to make needed investments in building capacity, streamlining operations, or scaling up their business.

9 In 2024, we excluded 29 organizations from most of the financial analyses because of either incomplete reporting or large discrepancies within the figures reported for total revenue, gross sales, total non-sales revenue, and total expenses.

10 Matson, J., Thayer, J., & Shaw, J. (2016). *Running a food hub: Assessing financial viability*. USDA. https://www.rd.usda.gov/sites/default/files/SR77-RunningAFoodHubVol3-AssessingFinancialViability.pdf

11 AgDirect. (2024). *Operating Expense Ratio: Measuring Your Farm's Financial Health*. https://www.agdirect.com/resources/learning-center/operating-expense-ratio

12 Zwilling, B. (2024). "Operational Ratios for Evaluating the Farm Business." farmdoc daily (14):94, Department of Agricultural and Consumer Economics, University of Illinois at Urbana-Champaign, May 17, 2024. https://farmdocdaily.illinois.edu/2024/05/operational-ratios-for-evaluating-the-farm-business.html

Table 1. **Gross Revenue by Survey Year**

Survey Year	Minimum	Median	Maximum
2025	$9,275	$631,015	$42,621,039
2021	$3,400	$409,500	$49,116,308
2019	-$3,000	$495,000	$100,000,000
2017	$1,000	$489,000	$90,000,000
2015	$5,000	$351,000	$96,000,000

Table 2. **OER by Survey Year**

	2013 (*N* = 77)	**2015** (*N* = 86)	**2017** (*N* = 78)	**2019** (*N* = 59)	**2021** (*N* = 74)	**2025** (*N* = 41)
Mean	1.09	0.88	1.13	1.1	0.8	1.04
Median	1	0.94	0.97	0.96	0.87	0.97
Range	0.04–6.79	0.01–3.10	0.06–7.18	0.02–9.76	0.10–1.98	0.12-7.92

What is an OER?

An OER is a way to measure the financial health of an organization. The measure is calculated by dividing total operating expenses by total gross revenue. If the OER is greater than 1.00, the organization's expenses are greater than its revenue. Conversely, if the OER is less than 1.00, the revenue is greater than expenses and the organization has a positive profit margin.

Proportionally more organizations responding to the 2025 survey were operating at a small scale than in any previous survey except 2013. Not all of these small-scale organizations were new operations. Of the 16 hubs with gross revenue of $100,000 or less, only one had been operating for two years or less; ten had been operating for at least six years. More than half of these organizations had only one or two employees. In other words, some hubs maintain operations with a very lean business model.

Figure 17. **Percentage of Organizations by Gross Revenue Category**

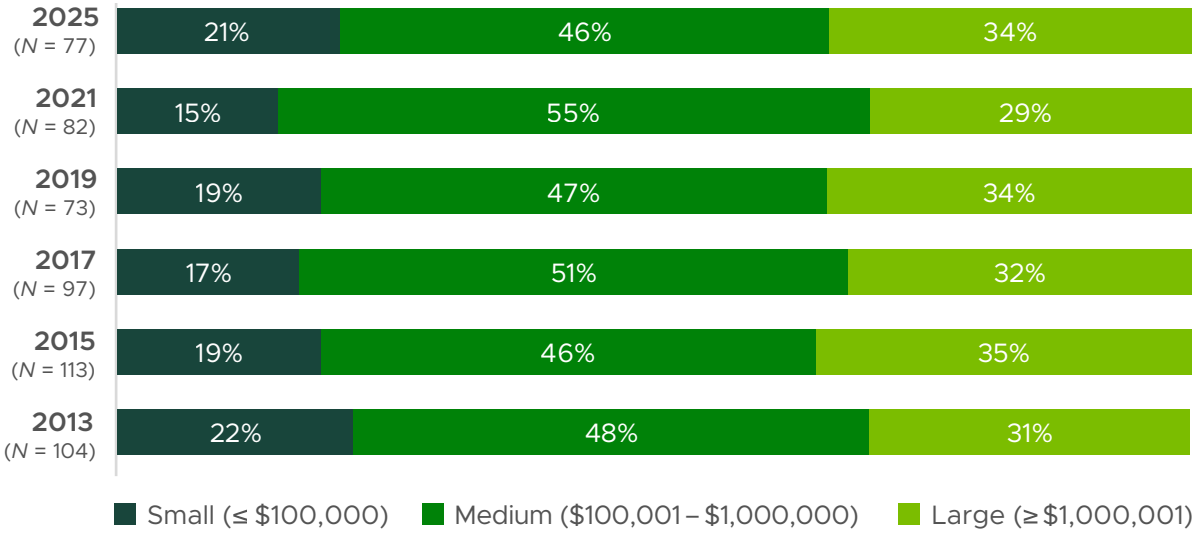
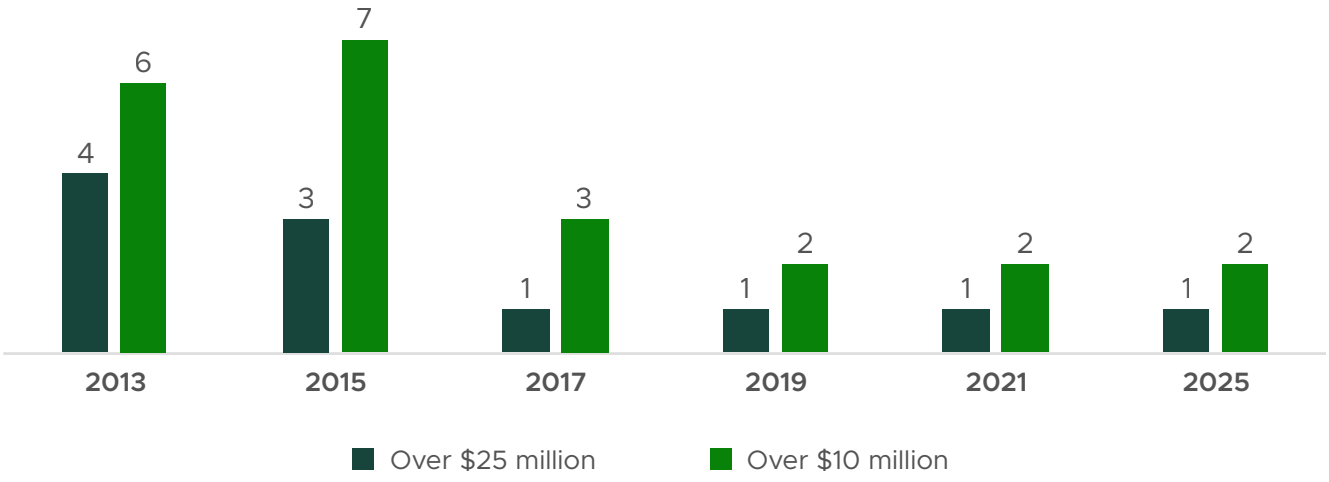


Figure 18 shows that the presence of very large food hubs, those with gross revenues over $10 million or over $25 million, was notably larger in the three earliest years of the survey than in the three most recent survey years. It is not clear, however, whether these differences simply reflect fewer survey responses in recent years from the organizations operating at this scale or true changes in the sector.

Figure 18. **Number of Very Large Food Hubs by Survey Year**



Over the last three survey years, the proportion of hubs bringing in non-sales revenue has continued to increase, as seen in Figure 19. On the other hand, Figure 20 shows that of those surveyed, the percentage of hubs receiving non-sales revenue was lower for most individual sources in 2025 than in 2021. There were three exceptions to this trend: other services provided by hubs, renting space to other businesses, and in-kind support. The increase in revenue from these sources could indicate a push to diversify revenue sources in light of lower product margins and decreasing federal and philanthropic funding sources.

Figure 19. **Percentage of Organizations Reporting One or More Sources of Non-Sales Revenue**

The percentage of hubs with non-sales revenue has continued to increase

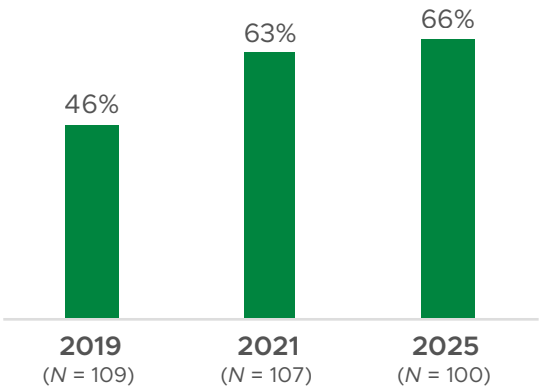
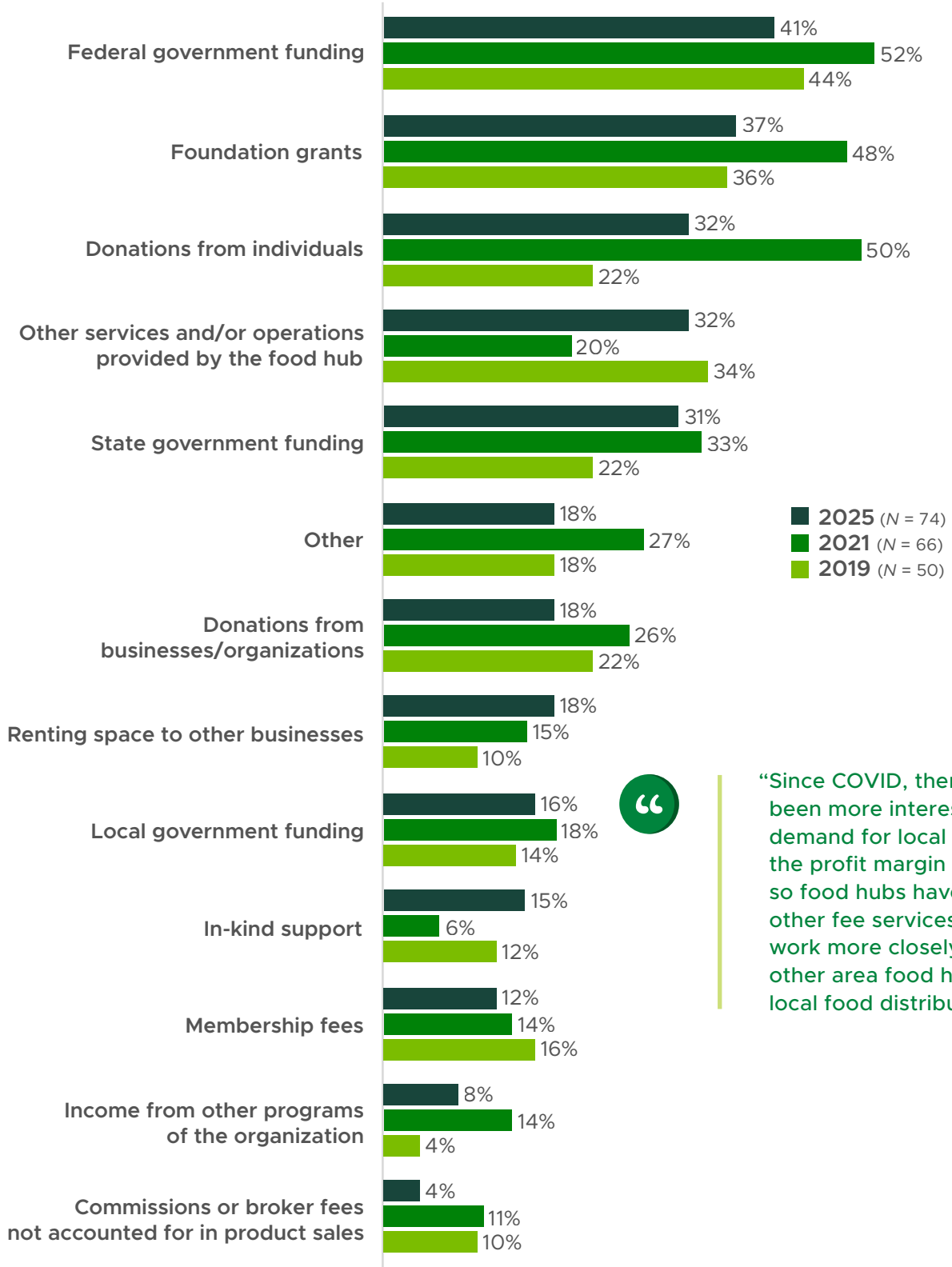


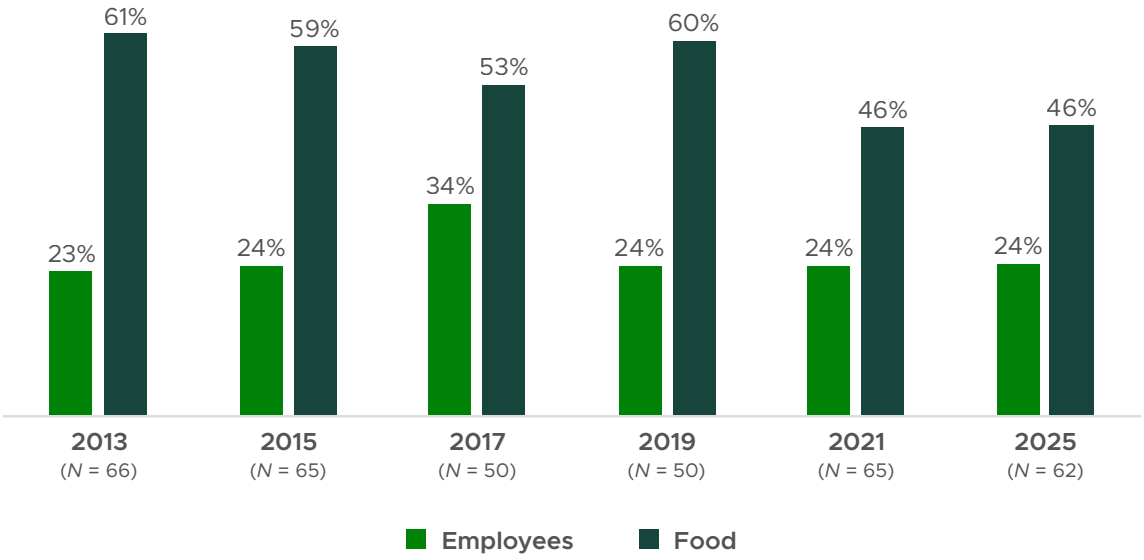
Figure 20. **Percentage of Organizations Reporting Non-Sales Revenue by Source**



"Since COVID, there has been more interest and demand for local food, but the profit margin is small, so food hubs have to offer other fee services and work more closely with other area food hubs and local food distributors."

As shown in Figure 21, labor costs have mostly hovered around an average 24% of total expenses while food costs have ranged from 46% to 61% of total expenses. In 2025, the average percentage of expenses devoted to equipment, fuel, trucks, and advertising all increased by between one and one and a half percentage points, which is in line with the increases in inflation since the 2021 survey data.[13,14]

Figure 21. **Top Expense Categories**



13 US Inflation Calculator. "Current US Inflation Rates: 2000–2025." Available from: https://www.usinflationcalculator.com/inflation/current-inflation-rates/

14 Srinivasan, H. (2025) "Historical U.S. Inflation Rate by Year: 1929 to 2025." Investopedia, August 12. https://www.investopedia.com/inflation-rate-by-year-7253832

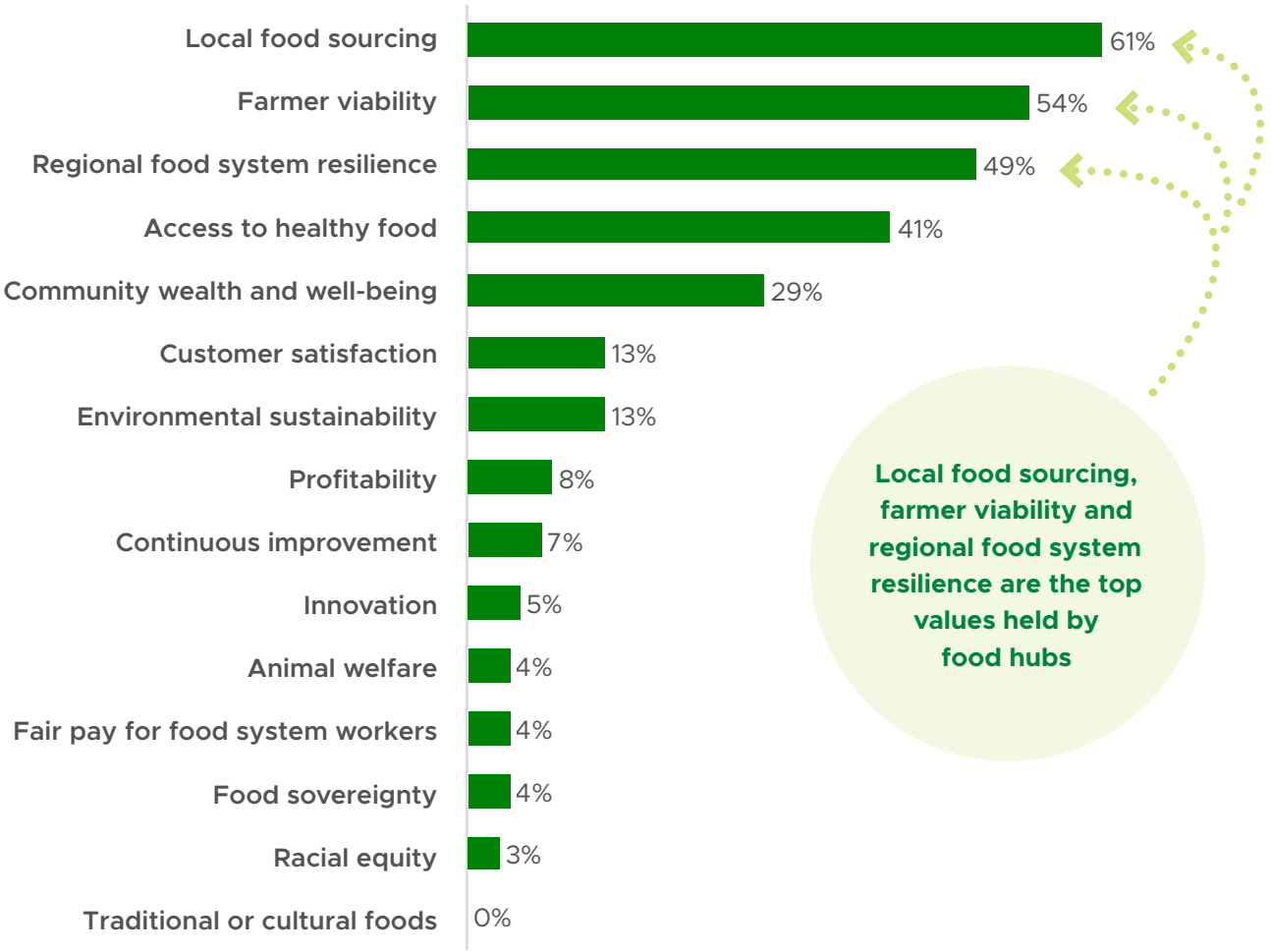
PART 3

Food Hubs as Mission-Driven Organizations

Survey findings have continued to provide insights into the values and missions of food hubs, demonstrating that these organizations consistently deliver more than food. Food hubs' organizational values distinguish them from other types of aggregators and distributors.

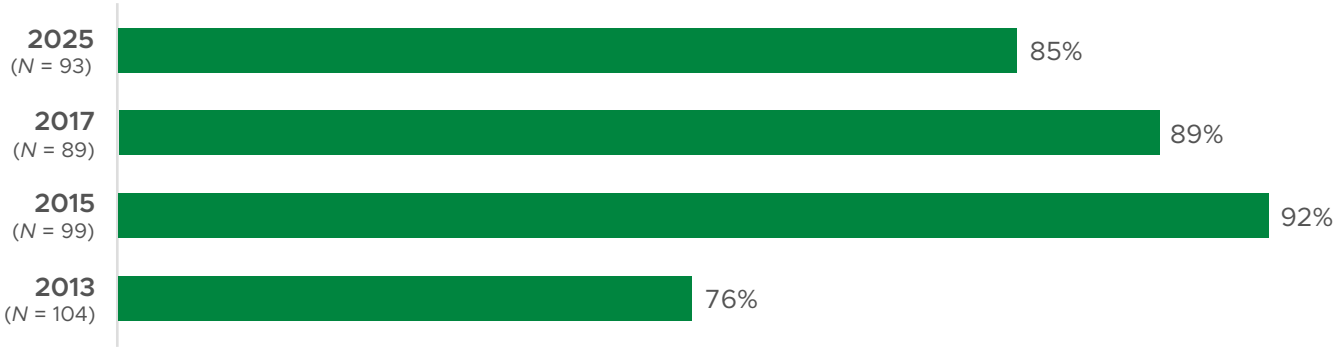
Their commitment to strengthening food systems and supporting the farms and families they serve is evident in the dominant values—local food sourcing, farmer viability, regional food systems resilience, and access to healthy food were all selected as top three values by upwards of 40% of respondents. In contrast, only 8% of respondents selected profitability as a top value.

Figure 22. **Percentage of Organizations Selecting Value Among Top Three Organizational Values**



The value hubs place on farmer viability is borne out in their sourcing practices. **The 2025 National Food Hub Survey respondents purchased from 4,816 different farms, with an average of 49 different farms.** For 85% of hubs, most[15] or all of the farms they purchased from were considered small or midsized (annual gross sales less than $500k), a proportion on par with that of earlier surveys (See Figure 23).

Figure 23. Percentage of Organizations Sourcing Mostly or Exclusively from Small to Midsized Farms[16]



The survey asked food hubs to share the mission-driven activities they were engaged in related to supporting producers, benefiting community members, and promoting sustainability, as shown in Figures 24–26. **Hubs, on average, were engaged in 19 different mission-driven activities**, similar to the average of 18 in 2021, with a range of two to 37. Nonprofit (20) and cooperative food hubs (23) reported a greater number of mission-driven activities on average than for-profit (17) organizations.

For the first time, the survey asked respondents to indicate the mission-driven activities they would like to offer. There were seven activities that 30% or more of respondents said they would like to offer:

Producer-support activities: forward contracting with producers (32%) and value-added product development (31%)

Community-support activities: nutrition incentive programs (41%); produce prescription programs (35%); USDA Farmers to Family Food Box or other food box program (34%),[17] and sliding-scale payment programs or subsidizing food prices (32%)

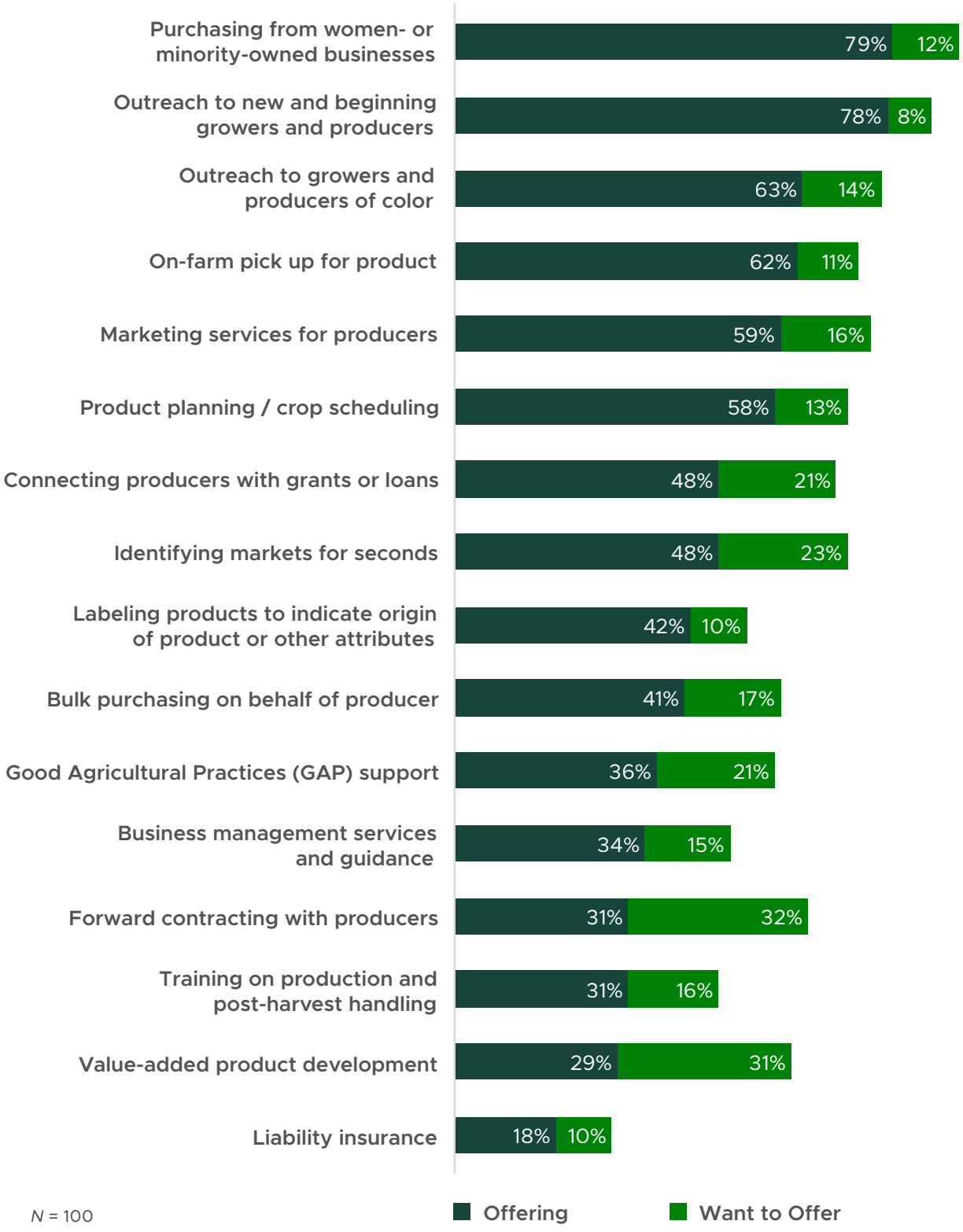
Sustainability activities: investing in fuel-efficient vehicles (47%)

15 Defined as between 65% and 99%.

16 This question was not included in the 2019 or 2021 surveys.

17 The USDA Farmers to Families Food Box Program operated from May 2020 to May 2021. Other locally-based food box programs, such as the Great Lakes Intertribal Food Coalition Tribal Elder Food Box program, continue to operate.

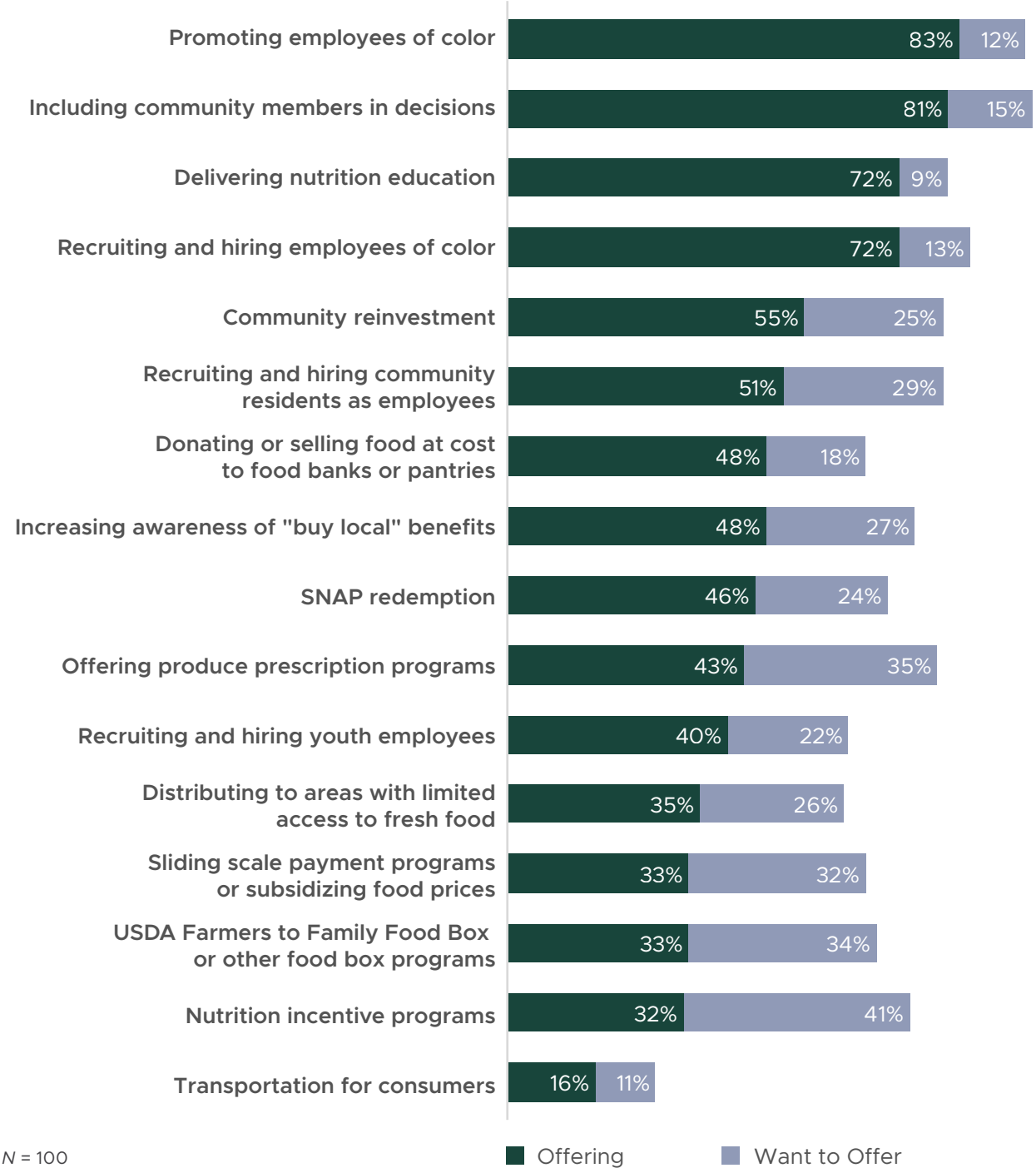
Figure 24. **Frequency of Participation in Producer-Support Activities**



N = 100

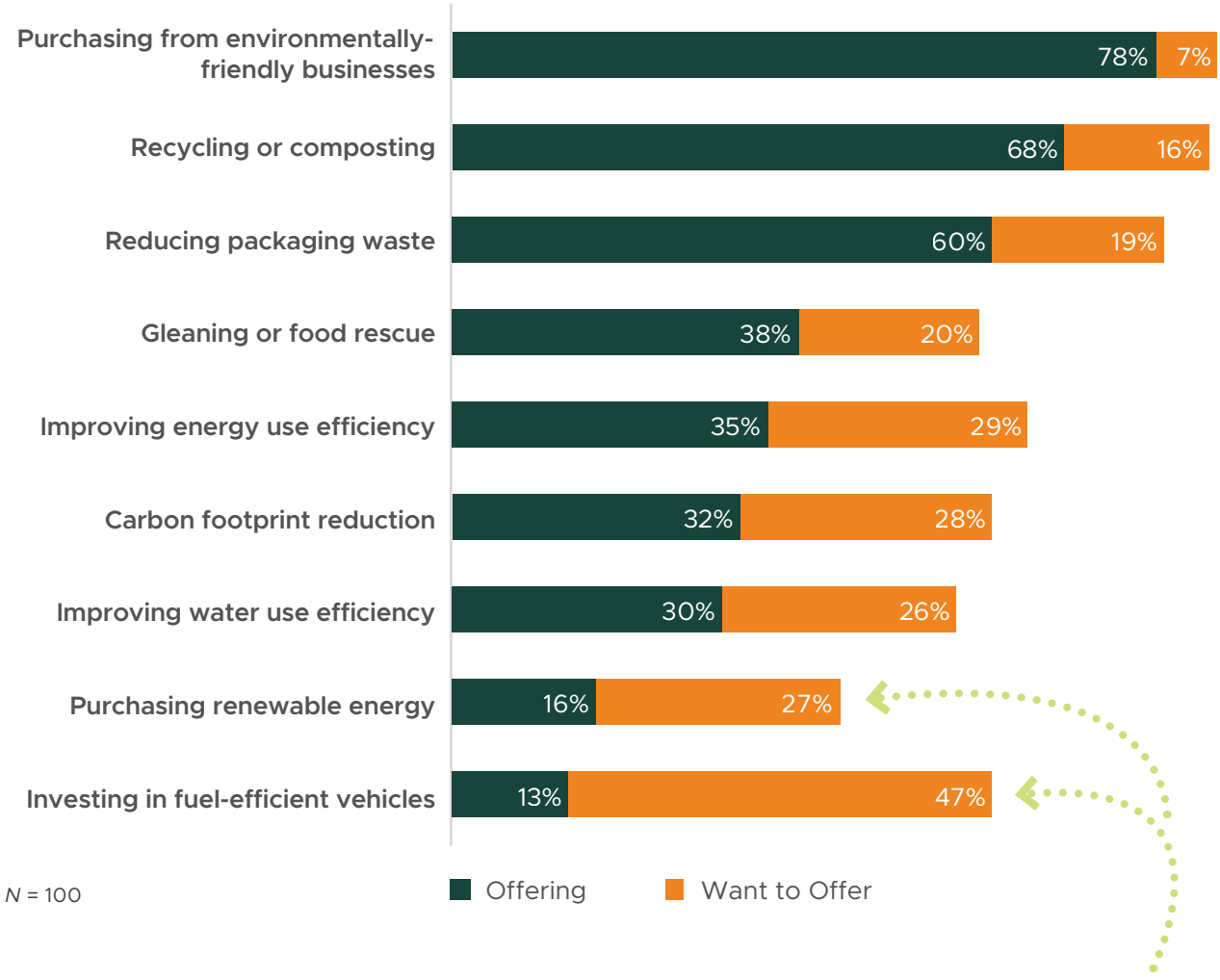
The community-support activities show a mix of efforts to provide direct material benefits to community members and to increase representation and participation. Promoting employees of color was a top activity as shown in Figure 25, but racial equity was lower in terms of food hub values, as shown in Figure 22.

Figure 25. **Frequency of Participation in Community-Support Activities**



N = 100

Figure 26. **Frequency of Participation in Sustainability Activities**



The data show a strong aspiration gap in advanced sustainability efforts like energy and fleet efficiency. Cost and capital access might be barriers to these activities.

Grant programs that can support equipment and material supplies combined with technical assistance could help reduce the gap between those wanting to support renewable energy and fleet efficiency and those able to do so.

Another way that hubs demonstrate their commitment to food access is through seeking approval to accept payment through the Supplemental Nutrition Assistance Program (SNAP). In 2025, 27 hubs said they accepted SNAP. Of these, 20 reported a total of $386,000 in SNAP redemptions in the 2024 calendar year.

Table 3. **SNAP Sales by Survey Year**

Year	Number of Hubs Redeeming SNAP	Total Redeemed	Average Redeemed	Range
2019	13	$97,855	$7,527	$205 – $40,000
2021	28 (33%)	$399,702	$14,275	$87 – $60,000
2025	**20 (26%)**	**$386,214**	**$16,092**	**$50 – $178,500**

Together, the findings on food hubs' mission-driven activities illustrate the wide range of ways these organizations are building new local food systems infrastructure and enabling their communities to develop their local food systems in ways that build food security and resilience.

PART 4

Technical Assistance and Network Opportunities

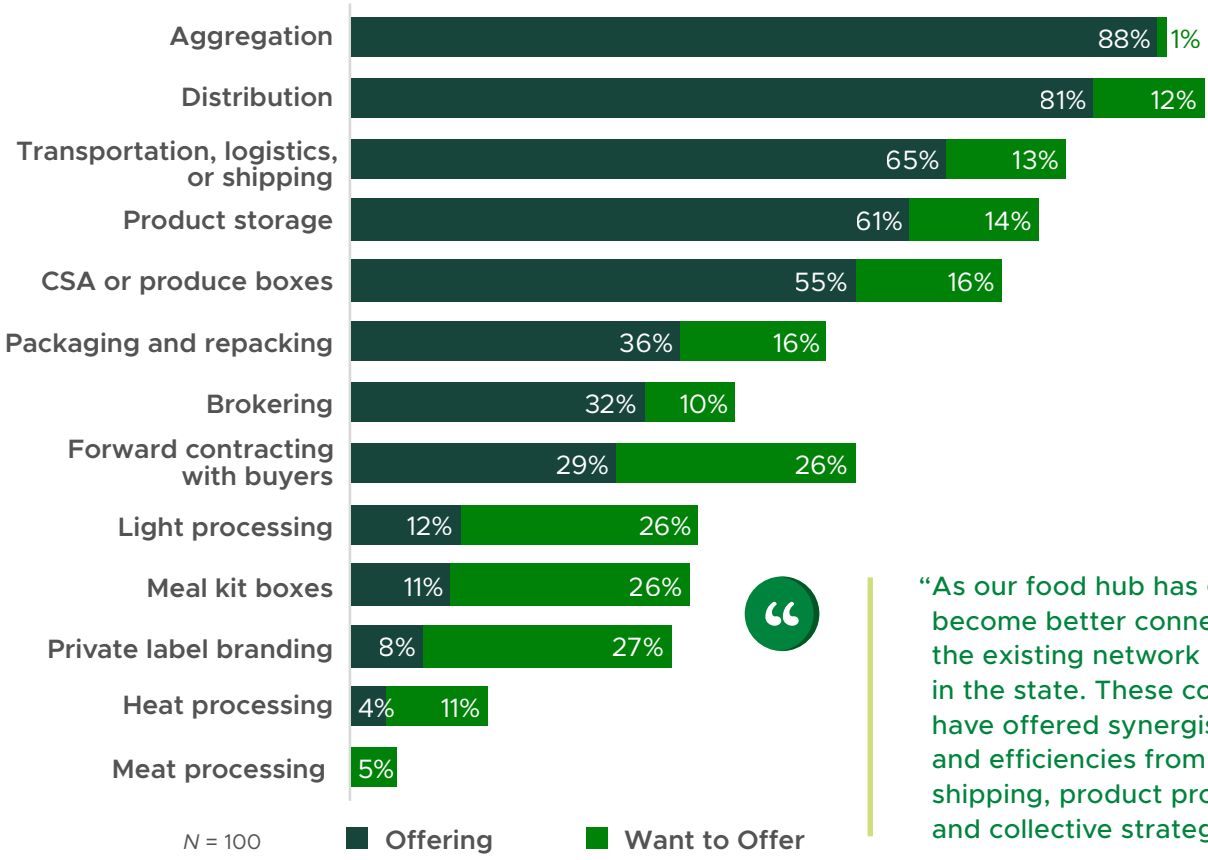
Looking across survey findings at the barriers and challenges food hubs face as well as the ways respondents shared that they want to grow and evolve provides a roadmap for technical assistance and network opportunities in the sector.

Although aggregation and distribution continue to dominate operational activities, other responses point to emerging opportunities in the sector, as shown in Figure 27. **Of note, one in four food hubs want to offer:**

- **forward contracting with buyers**
- **light processing**
- **meal kit boxes**
- **private label branding**

Food hub networks are a valuable collaboration tool[18] that could play a greater role, on a state or multistate basis, in connecting hubs that are engaging in specific operational activities with hubs that reported wanting to offer these opportunities. Depending on the level of trust within networks,[19] they may also be positioned to convene discussions on pursuing some of the aspirational activities, such building value-added processing capacity and contracting with suppliers for value-added products.

Figure 27. **Frequency of Participation in Operational Activities**

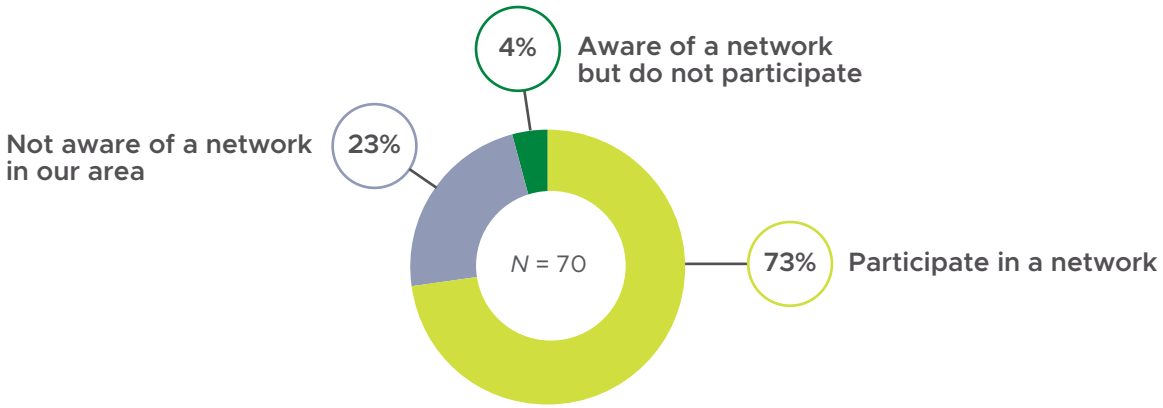


> "As our food hub has grown, it has become better connected with the existing network of food hubs in the state. These connections have offered synergistic benefits and efficiencies from transport/ shipping, product procurement, and collective strategy."

18 Pirog, R., Harper, A., Gerencer, M., Lelle, M., & Gerencer, C. (2014). *The Michigan food hub network: A case study in building effective networks for food systems change.* MSU Center for Regional Food Systems. https://www.canr.msu.edu/resources/michigan_food_hub_network_case_study

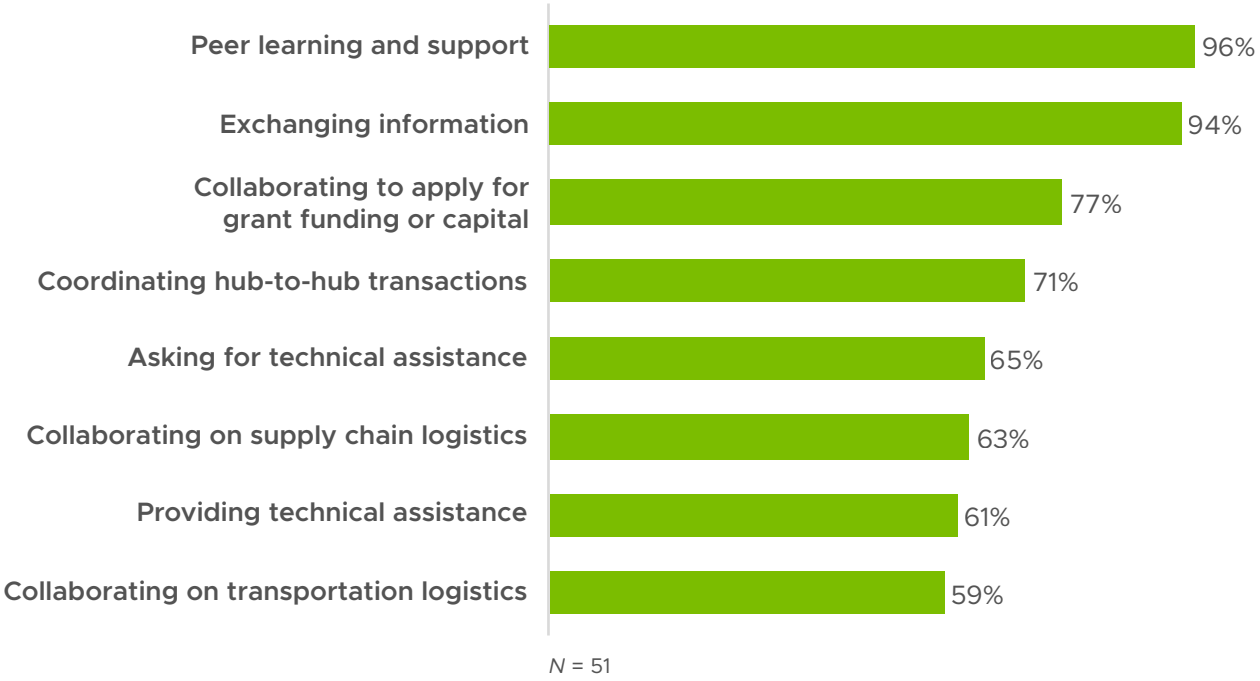
19 Ibid.

Figure 28. **Percentage of Food Hubs Participating in Networks**



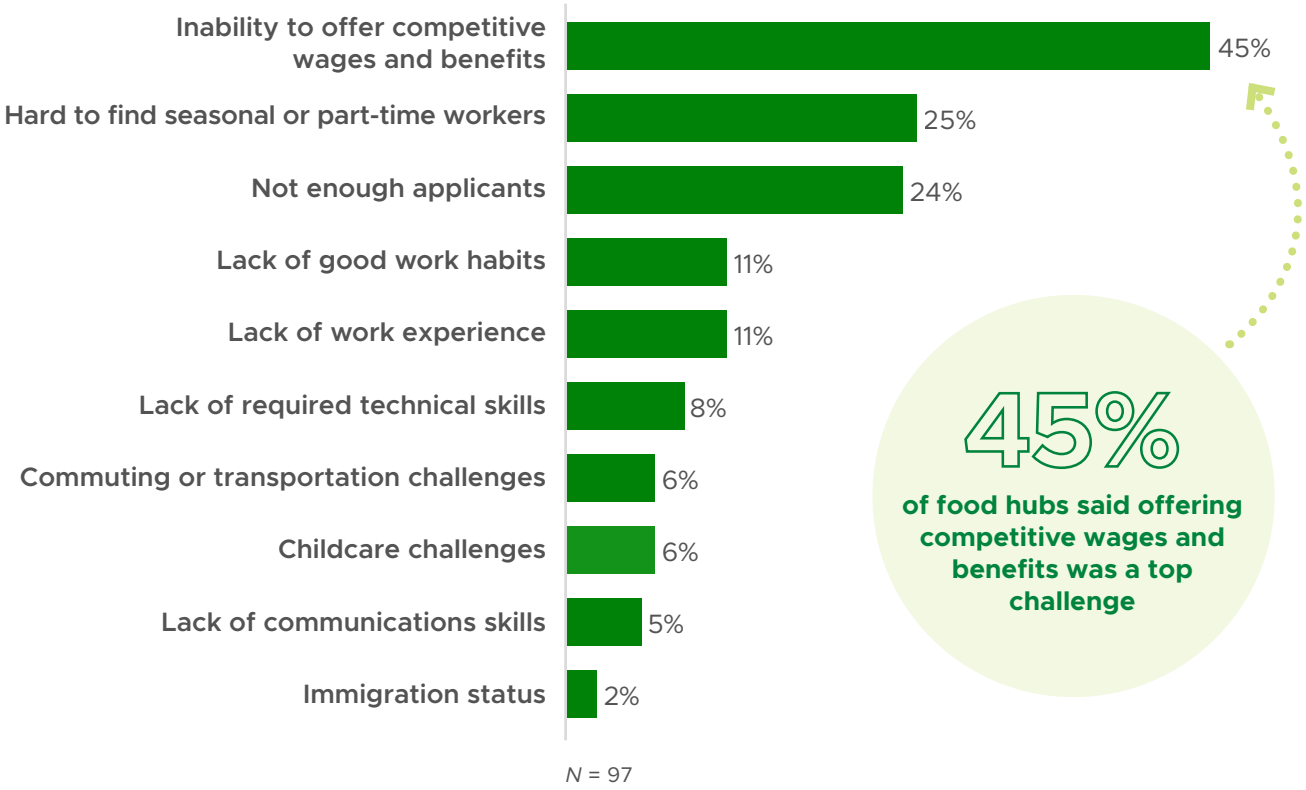
Very few food hubs that were aware of food hub networks did not participate in the networks. 73% of those surveyed were participating in a food hub network. The hubs participating in networks reported engaging in an average of six activities through these collaborative spaces. Close to half of the hubs in networks (45%) reported participating in all eight activities listed.

Figure 29. **Frequency of Network Activities among Organizations Participating in Networks**



Respondents were asked to select up to three of their most significant hiring or retention challenges. In addition to the listed items, four respondents wrote that the lack of affordable housing is a barrier to hiring. The hiring and retention challenges, shown in Figure 30, demonstrate similar themes for the last seven years for food hub survey data and are not dissimilar to the 2019 Local and Regional Food System Workforce assessment results, which surveyed business owners.[20]

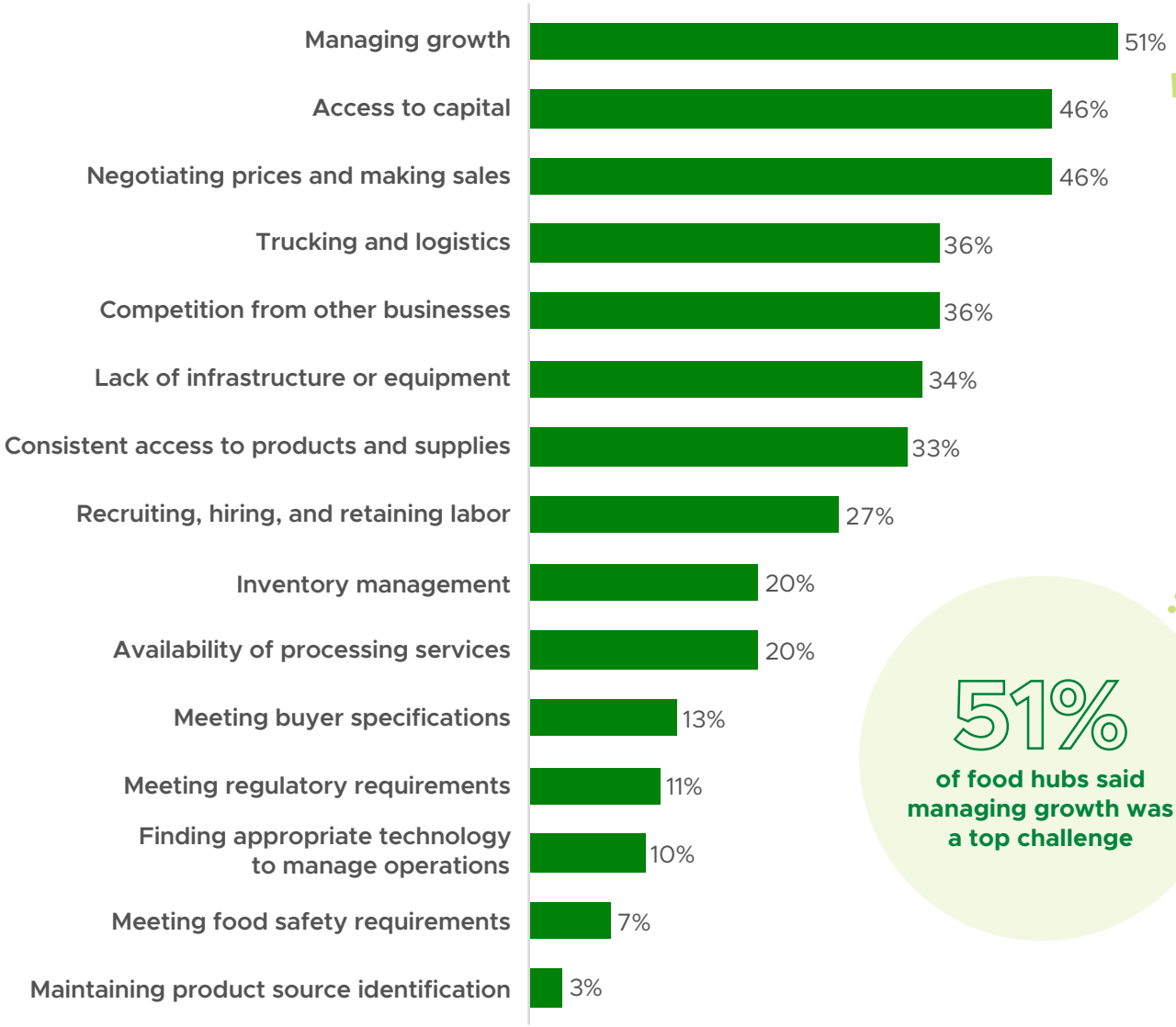
Figure 30. Top Hiring or Retention Challenges



20 Barry, J., La Prad, J., Hughes, A., Freeman, M., Wojciak, K., Bair, R., Pirog, R. (2019). *Developing Michigan's local and regional workforce: Challenges and opportunities identified by surveying business owners.* Michigan State University Center for Regional Food Systems. https://foodsystems.msu.edu/resources/2019-workforce-assessment-employer-survey

Figure 31. **Top Challenges Facing Food Hubs**

Respondents were able to select up to five top challenges facing their organization.

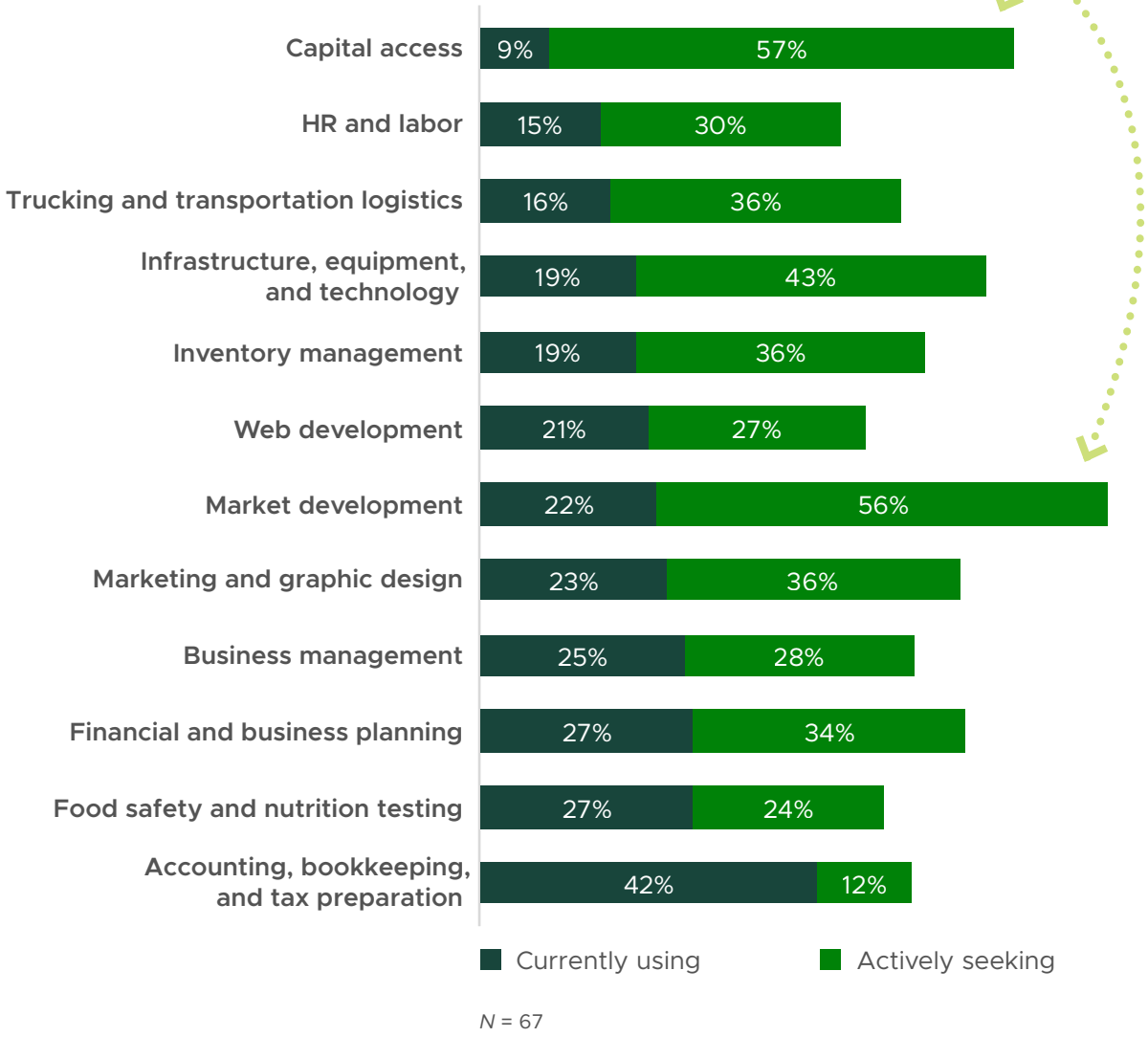


51%

of food hubs said managing growth was a top challenge

Figure 32. **Technical Assistance Needed by Food Hubs**

More than half of food hubs are looking for technical assistance on capital access and market development.



N = 67

Some of the mission-driven activities that food hubs would like to do, as mentioned in Part 3 of this document, may also benefit from technical assistance and resource sharing for food hubs.

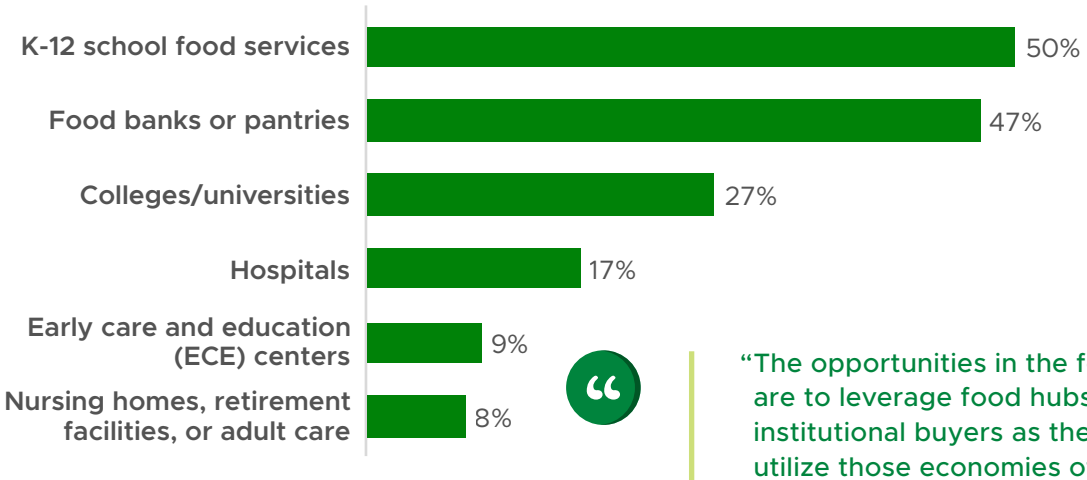
PART 5

Institutional Sales

The food hub survey data offer a picture of current sales to institutions and reveal the barriers and opportunities to expansion.

While Figure 9 shows the average percentage of sales by market channel, Figure 33 shows the proportion of hubs selling to the six dominant institution types. As seen, **sales to schools and food banks were most common, with approximately half of hubs reporting sales in each channel.** Close to two-thirds of hubs (65%) were selling to at least one of these two markets.

Figure 33. **Percentage of Food Hubs Selling to Institutions**



"The opportunities in the food hub sector are to leverage food hubs for school and institutional buyers as the foundation and utilize those economies of scale to provide access to local foods to restaurants, food pantries, and families."

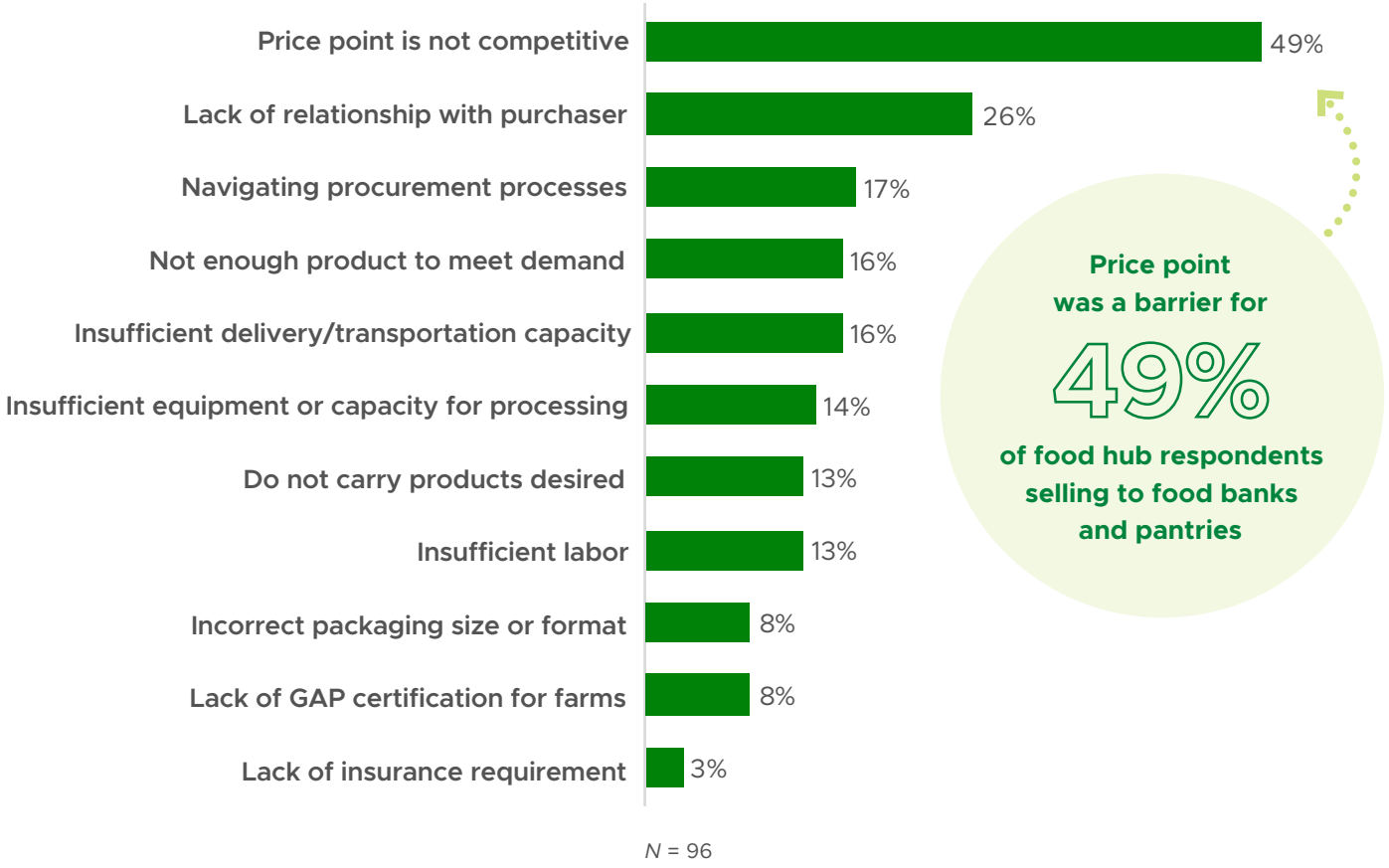
Despite the frequency of selling to schools, barriers were also common, particularly with regards to the price point and processing limitations, with upwards of 40% of hubs reporting these challenges. Furthermore, 28 of the 98 hubs said both price points and processing equipment were barriers in selling to schools. In addition to the barriers shown in Figure 34, other barriers noted in selling to K–12 schools were the lack of interest from schools (*n* = 6), seasonality (*n* = 5), schools' lack of cold storage (*n* = 3), and schools' lack of processing capacity (*n* = 2).

Figure 34. Barriers in Selling to K–12 Schools

Price point and processing limitations were common barriers to food hubs selling to K-12 schools (>40%)

Looking at sales to emergency food facilities, close to half of hubs reported donating or selling food at cost to food banks or pantries, which relates to the top barrier of a price point that is not competitive. In addition to the listed barriers, six respondents mentioned pantries' lack of funding as a barrier.

Figure 35. **Barriers in Selling to Food Banks and Pantries**



For the first time, the 2025 survey asked about barriers to using government local purchasing programs, as shown in Figure 36. While the lack of transportation and administration funds dominated, other barriers mentioned included the inconsistency in funding availability (*n* = 6), the lack of funds for equipment (*n* = 2), and challenges working with a reimbursement model (*n* = 2).

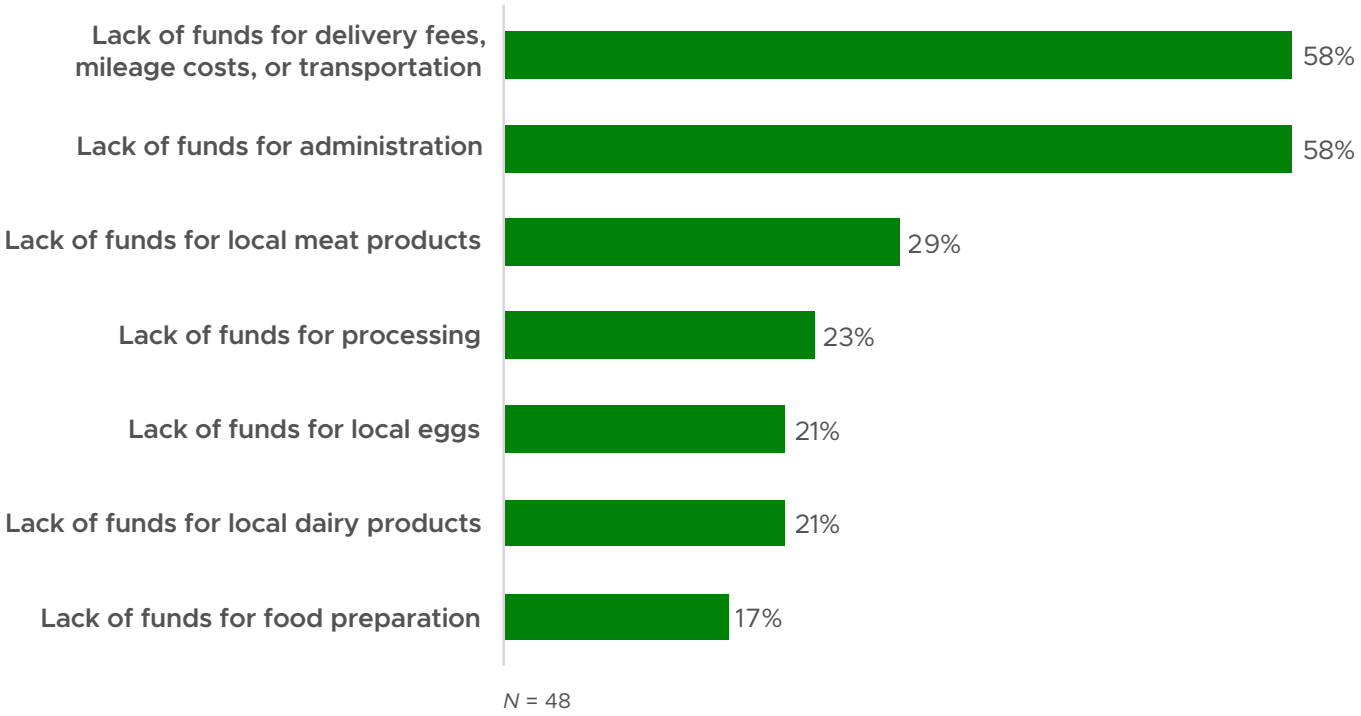
Multiple states offer Local Food Purchasing Incentives (LFPIs) incentivizing child nutrition programs to make local food purchases.[21] Some states offer expanded LFPIs, which include nonfood items such as transportation and refrigeration.[22] The fact that inability to cover

21 More information on LFPIs with listings of states involved can be found on the National Farm to School Network's website: https://www.farmtoschool.org/policy/lfpi

22 Bull, C., & Matts, C. (2024). *Expanded Local Food Purchasing Incentives: Programs that Reimburse More Than Local Food.* Michigan State University Center for Regional Food Systems. https://foodsystems.msu.edu/resources/Expanded-Local-Food-Purchasing-Incentives

delivery expenses was noted as a top challenge highlights the value of LFPIs operating in this type of expanded form. Findings also indicate that including administrative funds in farm-to-institution programs would strengthen program efficiency and increase the value of the funds invested.

Figure 36. Challenges to Using Government Programs Designed to Increase Local Food Purchasing



N = 48

Collectively, the findings related to institutional sales indicate that **hubs need greater access to funds that support the cost-efficient processing of produce into formats schools can utilize** and are more likely to purchase. On the other hand, even if hubs can make their products shelf-stable or processed and packaged to meet the schools' limited storage and processing infrastructure, the individuals preparing meals in the schools, and possibly the students themselves, may not have the education or tools needed to turn those products into meals that meet school lunch standards. Further processing by hubs may also increase product cost, putting purchases farther outside of schools' budgets, even if those products would otherwise help bridge the gap between raw ingredients and ready-to-serve meals.

PART 6

Market Shifts and Outlook

In 2025, 48% of hubs reported either increasing or beginning direct-to-consumer sales in the previous year. This proportion is well below the 75% of hubs that started or increased direct-to-consumer sales in the 2021 survey.

The years following the onset of the COVID-19 pandemic saw significant increases in direct-to-consumer sales in local food systems broadly.[23,24,25] Food hubs' open-ended comments in this year's survey, however, indicate the rate of growth in direct-to-consumer markets may be slowing.

> "Customers have been less willing to go out of their way to find local food since the pandemic."

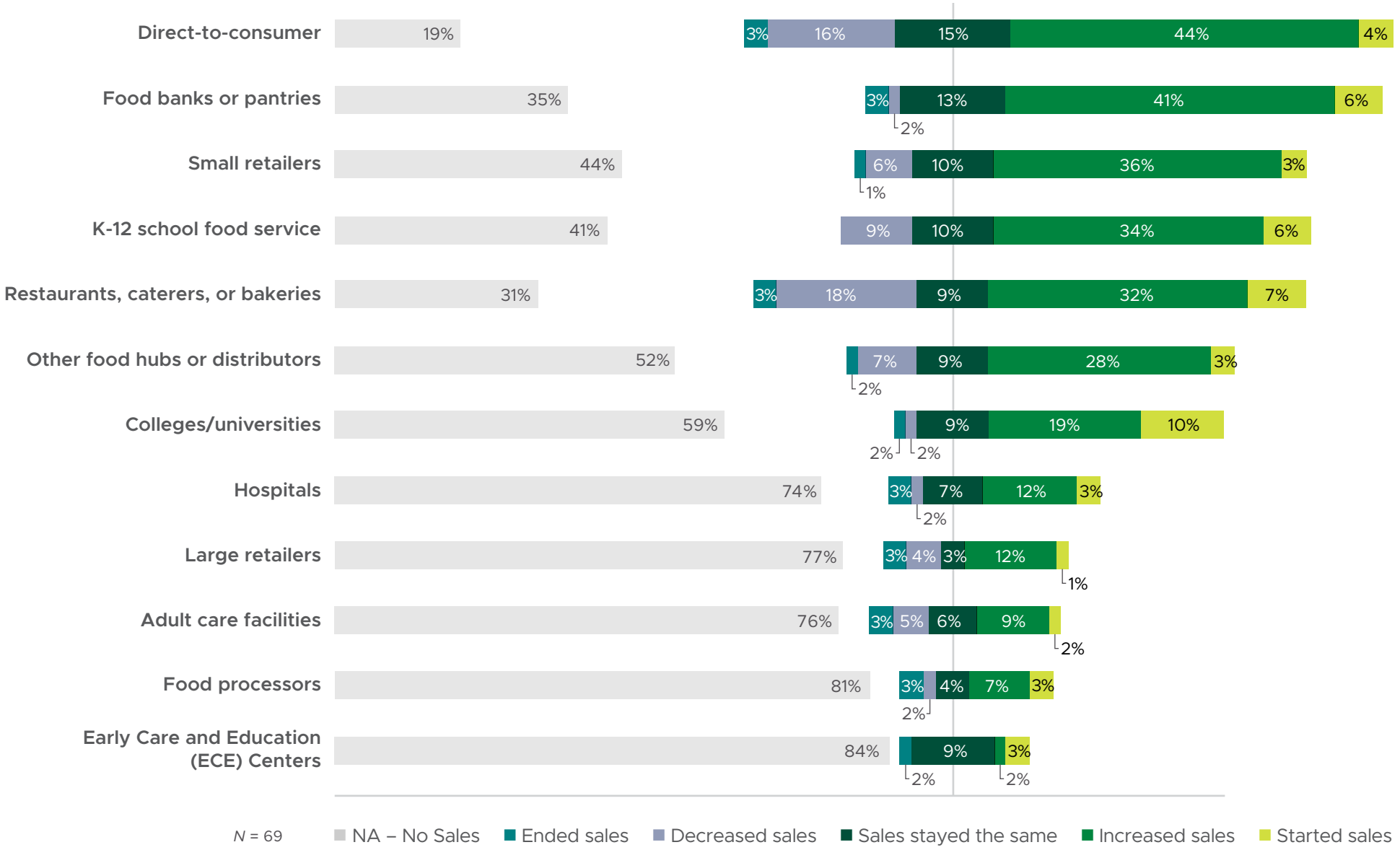
> "Maintaining sales volume through the restaurant/food service channel has been challenging as that sector has struggled with labor shortages, the cost of labor, the cost of food, and decreased sales. Farm to fork as a value within the industry has really declined as the business has gotten more challenging."

23 National Sustainable Agriculture Coalition. (2024). *Census of Agriculture Reveals the Promise of Regional Food Systems.* https://sustainableagriculture.net/blog/census-of-agriculture-reveals-the-promise-of-regional-food-systems/

24 Whitt, C. (2022). *Direct-to-consumer Farm Sales Reach $10.7 Billion in 2020, 35-percent Increase from 2019.* USDA Economic Research Service. https://www.ers.usda.gov/data-products/charts-of-note/chart-detail?chartId=104408

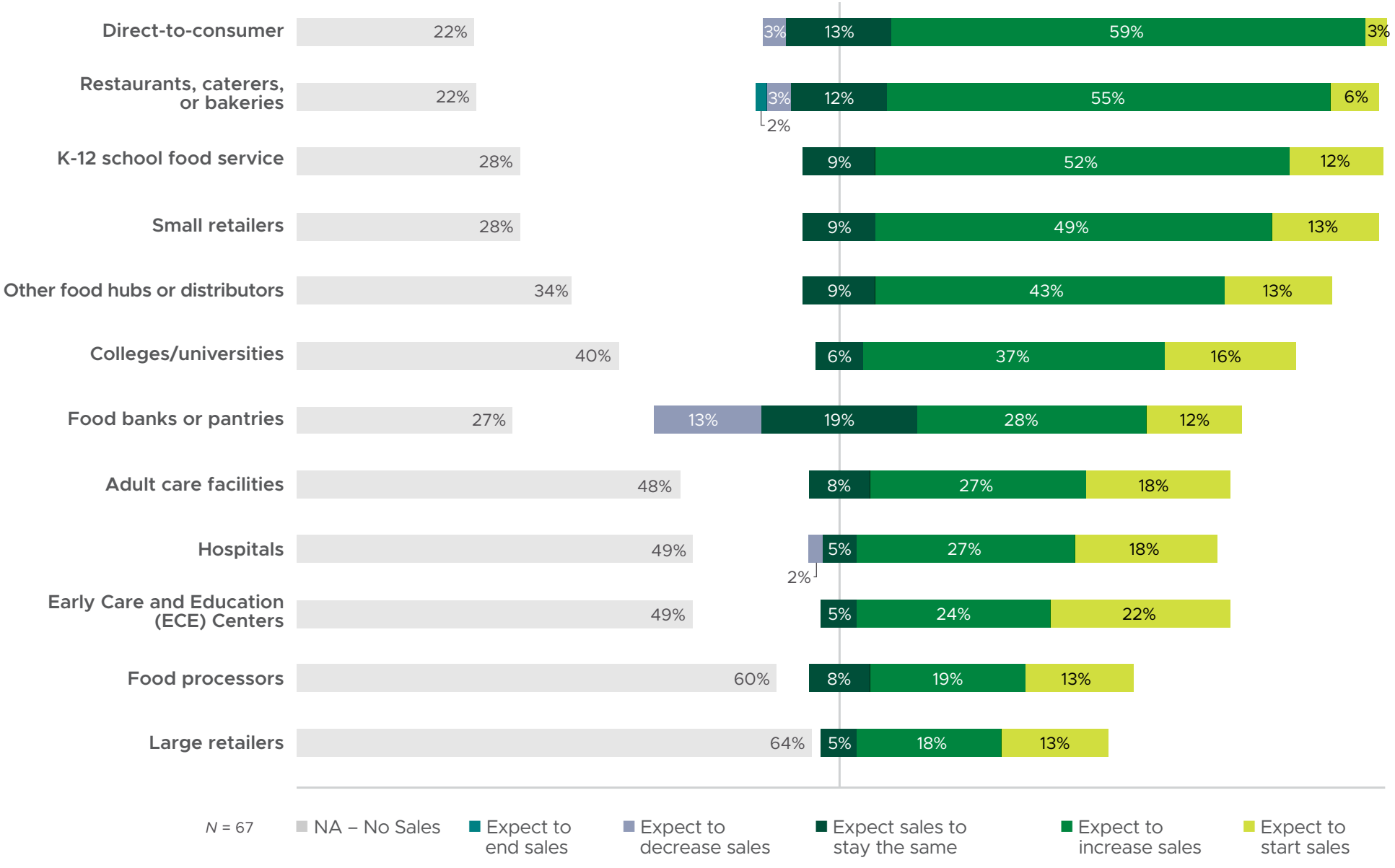
25 Martinez, S. (2021). *Local Food Sales Continue to Grow Through a Variety of Marketing Channels.* USDA Economic Research Service. https://www.ers.usda.gov/amber-waves/2021/october/local-food-sales-continue-to-grow-through-a-variety-of-marketing-channels

Figure 37. Changes in Food Hubs' Market Outlets in 2024



Even if the direct market growth rate is slowing at food hubs, Figure 38 shows that most hubs expect to increase their direct-to-consumer sales in the years ahead. Indeed, the proportion of hubs expecting increased sales exceeded the proportion expecting decreased sales for all 12 listed markets. The only market channel with a notable proportion of food hubs expecting decreased sales was food banks and pantries, perhaps attributable to the elimination of public funding for these sales.

Figure 38. **Expected Changes in Food Hubs' 2025–2026 Market Outlets**



PART 7

Conclusions and Recommendations

The importance of food hubs to farmers, regional economies and communities

Food hubs form critical infrastructure that not only enable movement of locally grown food from US farms to local consumers, but also build local economies and communities.

We received survey responses from 100 food hubs in 27 states across the USA. The findings of the 2025 National Food Hub survey findings show:

- **Food hubs support farmers.**
  Surveyed hubs purchased from an average of 49 farms and for 85% of hubs, most or all of their purchases were from small to mid-sized farmers.

- **Food hubs want farmers to succeed, and people and economies to thrive.**
  When asked, food hubs value local food sourcing, farmer viability, and regional food systems resiliency the most.

- **Food hubs sales to institutions are growing.**
  Between the 2021 and the 2025 surveys, food hubs average gross sales to schools more than tripled and average gross sales to food banks or pantries nearly doubled.

- **SNAP dollars support local farmers and communities through food hubs.**
  Twenty hubs reported redeeming an average of $16,092 SNAP dollars in 2024.

- **Hubs provide jobs.**
  Food hubs employ an average of 14 employees.

- **Hubs invest in their communities.**
  Most hubs include community members in decisions (81%), reinvest a portion of their profits in the surrounding community (55%), and recruit community residents as employees (51%).

- **Hubs see growth opportunities ahead, meaning more markets for farmers.**
  Hubs see possibilities to increase sales across multiple market channels in 2026. Nearly 60% of hubs see growth in the direct-to-consumer market, 55% in the restaurant and bakery markets, 52% in the K-12 school food service market, 49% in the small retail market, and 37% in the colleges and universities market, among other opportunities.

Recommendations to build food hub infrastructure based on the survey report

Food hub networks exist across the country and serve individual food hubs through collaboration and learning to meet food hubs' goals. The results of this survey were shared with members of the **National Food Hub Network Community of Practice (CoP)**, an organized national "network of food hub networks," who shared ideas on how the results of this survey and their own experience working with the food hub sector can inform support for hubs.

Based on the survey findings and this feedback, the authors make the following recommendations to those seeking to develop farms, food hubs and resilient food systems:

Leverage public and private investments to build national food hub infrastructure and resilient food supply chains for communities.

The outcome of these investments should include the following impacts:

- **Improved food hub viability and longevity.**
  Our data suggests that public and private investments are critical elements in ***food hub viability***. They enable food hubs to support farmers, communities, and economies. Public and private financing in the first ten years of operation is an important revenue stream to develop viability. Hubs' gross revenue increases with time in operation.

- **Increased demand for local farm food in institutional markets.**
  We have seen public investment in local procurement programs ***increase food hub sales into institutions like schools***. Investing in market-side or end purchasing programs, such as Local Food Purchasing Incentive programs, will generate more market interest in local farm food in settings such as schools, universities, and childcare facilities. This would lead to institutional culture change and long-term shifts in budgets and procurement policies.

- **Increased healthy food access for low-income communities and expanded markets for farmers.**
  Individual private donors and other funders who support pantries' and food banks' purchases from food hubs will simultaneously increase local food access in low-income communities and provide farmers with new markets.

- **Stronger and more sustainable national food hub infrastructure.**
  The CoP members suggested that infrastructure and equipment building remains an important need. They expressed the value of public dollars being available for food infrastructure and equipment as seen with the U.S. Department of Agriculture Resilient Food System Infrastructure grant program being used in some states. One in three hubs reported that a lack of infrastructure and equipment is a top challenge.

Offer training and investment to support hubs with business development and viable market expansion.

The outcome of these trainings and investment should include the following impacts:

- **New sustainable market channels for food hubs, with greater participation in markets with higher margins.**
  More than 50% of hubs are looking for help in market development and 46% report challenges negotiating prices and making sales. Hubs are anticipating that they will increase sales in multiple market channels in 2025 and 2026. Markets with the highest forecasted increase in sales include: direct-to-consumer markets (60%), restaurants and other retail outlets (55%), K-12 food service (52%), and small retailers (49%). Some CoP members suggested that seeking channels with higher margins could support the viability of hubs.

- **Enhanced knowledge and business support for navigating and increasing sales and procurement processes for institutional and other markets.**
  Nearly 40% of food hubs encounter barriers in navigating procurement processes in K-12 schools and 17% encounter the same barrier in food banks and pantries. Approximately one in three report the lack of relationship with the purchaser is a barrier to entering these markets. Approximately 50% currently do not find their price points into these markets competitive. Training in initiating sales and institutional procurement processes and seeking ways to build competitive strategies into institutional markets is necessary.

- **Improved business growth management.**
  More than 50% of hubs report challenges with managing growth. Understanding these limitations and seeking training and appropriate support is necessary to build food hub businesses.

- **Increased access to sources of capital.**
  Nearly 50% of hubs report challenges accessing capital and 57% are actively seeking technical assistance in this area. Increased understanding of the limitations, the technical assistance needs and partnerships to support capital access for hubs is needed.

- **Improved infrastructure and equipment.**
  One in three food hubs report a lack of infrastructure and equipment as a top challenge and 43% of hubs are actively seeking technical assistance for improving infrastructure, equipment, and technology. Increased understanding and provision of the hubs' training or assistance needs will strengthen the food hub sector.

- **Improved trucking and transportation logistics.**
  More than one in three hubs reported trucking and logistics as a top challenge and are actively seeking technical assistance in this area. Nearly half of the survey respondents were interested in investing in fuel efficient vehicles.

- **Expanded hub participation, partnership, and hub training support for food assistance programs, such as SNAP and other food access initiatives.** Beyond the 46% of hubs offering SNAP redemption, another 24% would like to do so. Additionally, more than one in three hubs would like to offer nutrition incentive programs, produce prescription programs, and food box programs.
- **Improved business administration.** More than one in four hubs are actively seeking technical assistance in core business operations, including inventory management, web development, human resources and labor, business management, and financial and business planning. One in three are challenged by access to products and supplies.

Strengthen food hub business, marketing, technical and advocacy capacity through an existing and expanded food hub network support structure.

The survey results show nearly 75% of food hubs responding to the survey are participating and engaging in a state or regional food hub network. The outcome of supporting regional networks and the associated National Community of Practice for food hub networks should include the following activities and outputs:

- **Expanded technical assistance offerings to meet emerging needs of food hubs for growth and resilience.** Trusted network structures offer a key avenue for providing training, coordination, collaboration, and market development assistance to build markets and business and strengthen the sector.
- **Continued facilitated information exchange and peer learning between food hub businesses.** Nearly all who engaged in their networks shared and learned together through their networks.
- **Expanded geographic reach of networks to more food hubs across the country.** Survey findings indicate there may be some areas of the country where food hubs do not have access to or are rarely participating in a food hub network. Expanded reach of existing networks or forming new networks could ensure more hubs have opportunities to benefit from the peer learning and technical assistance available in these collaborative spaces.
- **Collaborating to seek capital.** More than 75% of the hubs participating in networks shared they use these spaces to collaborate on applying for grant funding or other capital. Strengthening and expanding these network-based capital access strategies can help meet food hubs' critical need for capital access.

Organize to build food hub advocacy efforts.

With no known current coordinated food hub advocacy efforts, a member of the CoP recommended this as a potential area of growth for networks and the national CoP.

Details of how these recommendations should be implemented were not discussed in detail and should be developed by the stakeholders themselves, including food hubs and their networks.

Appendix

Appendix A: Methodology

SURVEY DESIGN

The 2025 National Food Hub Survey instrument was adapted from previous instruments. The project advisory committee guided the changes made, which included gathering additional specificity on technical assistance needs, understanding barriers to utilizing farm-to-institution grant programs, capturing key characteristics of the food hub landscape, and simplifying where possible while maintaining continuity with previously collected data. The final survey instrument was prepared in Qualtrics by the University of Michigan Program Evaluation Group (UM PEG) using the 2021 survey as a template.

SURVEY DISTRIBUTION

CRFS promoted the survey through a range of channels. Staff sent direct invitations to complete the survey to previous survey respondents and other known food hub contacts. Staff also sent survey information to regional food hub network leaders and partner organizations and promoted the survey on the MSU CRFS website, through multiple social media posts, and through food systems and food hub specific listservs. The survey was open from February 5 to April 22, 2025. The survey requested data representing food hub operations from January 1, 2024, to December 31, 2024.

SURVEY SAMPLE

Of the 282 initiated survey responses, we removed 171 responses that were less than 40% complete. We also removed six responses from organizations, including technical assistance nonprofits and national retailers, that did not fit the definition of a food hub. The final sample consisted of 100 responses, including 70 complete responses and 30 partial responses ranging from 42% to 65% complete.

DATA ANALYSIS

UM PEG exported survey data from Qualtrics into Microsoft Excel. After the data were cleaned, the data were imported into IBM SPSS Statistics Version: 30.0.0.0 (172). UM PEG used SPSS to calculate descriptive statistics, including counts, percentages, and means, and cross-tabulations for key variables of interest. For comparisons between survey years, UM PEG drew on previously published survey findings.

UM PEG conducted a content analysis of the open-ended responses to identify themes. Additionally, quotations from open-ended responses are included throughout the report to shed light on the perspective and experience of specific food hubs. Quotations were selected to illustrate a range of viewpoints and should not be interpreted as themes unless otherwise stated.

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VISION

CRFS envisions a thriving economy, equity, and sustainability for Michigan, the country, and the planet through food systems rooted in local regions and centered on Good Food: food that is healthy, green, fair, and affordable.

MISSION

The mission of CRFS is to engage the people of Michigan, the United States, and the world in applied research, education, and outreach to develop regionally integrated, sustainable food systems.

ABOUT

CRFS joins in Michigan State University's pioneering legacy of applied research, education, and outreach by catalyzing collaboration and fostering innovation among the diverse range of people, processes, and places involved in regional food systems. Working in local, state, national, and global spheres, CRFS' projects span from farm to fork, including production, processing, distribution, policy, and access.

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