STATE OF THE FOOD HUB
A SUMMARY OF THE 2013 NATIONAL FOOD HUB SURVEY RESULTS

September 19, 2013
Presentation Outline

• Technical Orientation
  Welcome / Introduction

John Fisk
Wallace Center at Winrock International

Jeff Farbman
Wallace Center at Winrock International

• The Survey: Motivation
• The Survey: Findings
• The Survey: Implications
• Questions and Answers
• Upcoming Opportunities, etc.
WALLACE CENTER at WINROCK INTERNATIONAL

- Market based solutions to a 21st Century food system
- Work with multiple sectors – business, philanthropy, government
- Healthy, Green, Affordable, Fair Food
- Scaling up Good Food
NATIONAL GOOD FOOD NETWORK: VISION
NATIONAL GOOD FOOD NETWORK: GOALS

Supply Meets Demand
- There is abundant good food (healthy, green, fair and affordable) to meet demands at the regional level.

Information Hub
- The National Good Food Network (NGFN) is the go to place for regional food systems stories, methods and outcomes.

Policy Change
- Policy makers are informed by the results and outcomes of the NGFN and have enacted laws or regulation which further the Network goals.

http://ngfn.org | contact@ngfn.org
Presentation Outline

• Technical Orientation
• Welcome / Introduction

The Survey: Motivation

Rich Pirog
Center for Regional Food Systems,
Michigan State University

• The Survey: Findings
• The Survey: Implications
• Questions and Answers
• Upcoming Opportunities, etc.
THE 2013 NATIONAL FOOD HUB SURVEY

WHY THE SURVEY?
WHY THE PARTNERSHIP?

Rich Pirog – Senior Associate Director
MSU Center for Regional Food Systems

MSU Center for Regional Food Systems & The Wallace Center at Winrock International
WHY A NATIONAL SURVEY OF FOOD HUBS?

“Learn from the past, live in the present, plan for the future”

Audrey Farrell

“If you don’t know where you are going, any road will get you there”

Lewis Carroll
WHY THE SURVEY?

- Growing number of food hubs across U.S.
- Lack of information on characteristics and overall performance
- Need reliable information to inform investment, policy
- Baseline of time series data set on food hub operations
- Help inform local networks (such as MI Food Hub Network)

THE PARTNERSHIP

- MSU Center for Regional Food Systems
- Wallace Center at Winrock International
- USDA’s key role
- NGFN Food Hub Collaboration
Presentation Outline

- Technical Orientation
- Welcome / Introduction
- The Survey: Motivation
- The Survey: Findings
- The Survey: Implications
- Questions and Answers
- Upcoming Opportunities, etc.

Micaela Fischer
Center for Regional Food Systems, Michigan State University
FINDINGS OF THE 2013 NATIONAL FOOD HUB SURVEY

Micaela Fischer
Graduate Affiliate, CRFS
fisch208@msu.edu
ABOUT THE SURVEY

What: A national survey of food hubs conducted by MSU Center for Regional Food Systems in association with the Wallace Center. USDA assisted in the development of the survey.

Purpose: Investigation into food hub financial viability, economic impact, healthy food access, challenges faced, and emerging market opportunities.

When: Conducted during February and March 2013. Collected data from food hubs on 2012 calendar year operations.

MSU Center for Regional Food Systems & The Wallace Center at Winrock International
ABOUT THE SURVEY

Who Was Surveyed:

- Hubs from NGFN’s Food Hub Collaboration’s list of food hubs (totaled 222 hubs in early 2013)
- Any other, self identified food hubs

- Used the Collaboration’s (USDA’s) working definition of a food hub in the survey:
  - “A business or organization that actively manages the aggregation, distribution, and marketing of source-identified food products primarily from local and regional producers to strengthen their ability to satisfy wholesale, retail, and institutional demand.”
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  • “A business or organization that actively manages the aggregation, distribution, and marketing of source-identified food products primarily from local and regional producers to strengthen their ability to satisfy wholesale, retail, and institutional demand.”

• 125 food hubs responded to the survey, 107 response sets were useable.
THANK YOU!

...To the 125 food hubs that submitted responses

...To the 5 food hubs that pilot tested the survey

...To all who provided input during the development of the survey

...To all who helped recruit participants

...To the expert peer reviewers

...To NGFN for this webinar!
ABOUT THE RESPONDENTS

Geographic Distribution:

Census Geographic Divisions
- East North Central
- East South Central
- Middle Atlantic
- Mountain
- New England
- Pacific
- South Atlantic
- West North Central
- West South Central

MSU Center for Regional Food Systems & The Wallace Center at Winrock International
# ABOUT THE RESPONDENTS

## Metro vs. Nonmetro counties:

<table>
<thead>
<tr>
<th>County Type</th>
<th>N</th>
<th>Percent of hubs</th>
<th>Metropolitan Counties</th>
<th>Nonmetropolitan Counties</th>
</tr>
</thead>
<tbody>
<tr>
<td>In metro areas of 1 million population or more</td>
<td>51</td>
<td>48%</td>
<td>8</td>
<td>7%</td>
</tr>
<tr>
<td>In metro areas of 250,000 to 1 million population</td>
<td>18</td>
<td>17%</td>
<td>3</td>
<td>3%</td>
</tr>
<tr>
<td>In metro areas of fewer than 250,000 population</td>
<td>11</td>
<td>10%</td>
<td>8</td>
<td>7%</td>
</tr>
<tr>
<td>Urban population of 20,000 or more, adjacent to a metro area</td>
<td>8</td>
<td>7%</td>
<td>3</td>
<td>3%</td>
</tr>
<tr>
<td>Urban population of 20,000 or more, not adjacent to a metro area</td>
<td>3</td>
<td>3%</td>
<td>8</td>
<td>7%</td>
</tr>
<tr>
<td>Urban population of 2,500 to 19,999, adjacent to a metro area</td>
<td>8</td>
<td>7%</td>
<td>6</td>
<td>6%</td>
</tr>
<tr>
<td>Urban population of 2,500 to 19,999, not adjacent to a metro area</td>
<td>6</td>
<td>6%</td>
<td>2</td>
<td>2%</td>
</tr>
<tr>
<td>Completely rural or less than 2,500 urban population, adjacent to a metro area</td>
<td>2</td>
<td>2%</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Completely rural or less than 2,500 urban population, not adjacent to a metro area</td>
<td>0</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
ABOUT THE RESPONDENTS

Operational Structure ($N=107$)

- **Non-Profit**: 34%
- **For-Profit**: 47%
- **Cooperative**: 13%
- **Publicly Owned**: 4%
- **Other**: 2%

MSU Center for Regional Food Systems & The Wallace Center at Winrock International
ABOUT THE RESPONDENTS

Years in Operation (N=106)

- **0-2 Years**: 32%
- **3-5 Years**: 30%
- **6-10 Years**: 13%
- **11-15 Years**: 11%
- **16-20 Years**: 4%
- **Over 20 Years**: 11%

**Average**: 11 years
**Median**: 4 years
**Range**: Less than 1 year to 142 years

MSU Center for Regional Food Systems & The Wallace Center at Winrock International
ABOUT THE RESPONDENTS

Types of products sold (N=81)

- Fresh produce and herbs: 93% (68% average)
- Meat and poultry: 65% (21% average)
- Eggs: 60% (5% average)
- Other processed or value-added food products: 52% (10% average)
- Milk and other dairy products: 50% (10% average)
- Baked goods/bread: 41% (5% average)
- Processed produce: 38% (9% average)
- Grains, beans and/or flours: 37% (4% average)
- Non-food items: 29% (3% average)
- Coffee/tea: 21% (1% average)
- Fish: 13% (6% average)

Legend:
- Black bar: Average percent of total gross sales
- Orange bar: Percent of food hubs that carry
ABOUT THE RESPONDENTS

Employees

- The 82 food hubs that responded to the question about numbers of employees had, in sum, 787 full-time, year-round workers.

<table>
<thead>
<tr>
<th></th>
<th>Full-time</th>
<th>Part-time</th>
<th>Seasonal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average</td>
<td>11</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Median</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Range</td>
<td>0 to 155</td>
<td>0 to 15</td>
<td>0 to 59</td>
</tr>
</tbody>
</table>

- 58 hubs had at least one part-time employee and 33 hubs at least one seasonal employee.
ABOUT THE RESPONDENTS

Management Skills ($N=91$)

<table>
<thead>
<tr>
<th>Area</th>
<th>Less than 1 year</th>
<th>1-2 years</th>
<th>3-5 years</th>
<th>6-10 years</th>
<th>Over 10 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic planning</td>
<td>13%</td>
<td>10%</td>
<td>16%</td>
<td>16%</td>
<td>45%</td>
</tr>
<tr>
<td>Management</td>
<td>13%</td>
<td>18%</td>
<td>13%</td>
<td>16%</td>
<td>41%</td>
</tr>
<tr>
<td>Production</td>
<td>23%</td>
<td>17%</td>
<td>11%</td>
<td>16%</td>
<td>33%</td>
</tr>
<tr>
<td>Food marketing and sales</td>
<td>10%</td>
<td>15%</td>
<td>19%</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td>Warehousing/ distribution of food</td>
<td>8%</td>
<td>28%</td>
<td>25%</td>
<td>15%</td>
<td>24%</td>
</tr>
<tr>
<td>Food processing</td>
<td>40%</td>
<td>22%</td>
<td>14%</td>
<td>5%</td>
<td>19%</td>
</tr>
<tr>
<td>Food retail</td>
<td>19%</td>
<td>22%</td>
<td>19%</td>
<td>22%</td>
<td>18%</td>
</tr>
</tbody>
</table>
FINDINGS: FOOD HUB PRODUCERS

- Numbers of Producers/Suppliers ($N=79$)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average</strong></td>
<td>80</td>
</tr>
<tr>
<td><strong>Median</strong></td>
<td>36</td>
</tr>
<tr>
<td><strong>Range</strong></td>
<td>5 to 2000</td>
</tr>
</tbody>
</table>

- On average, food hubs reported that:
  - 29% of their producers were women
  - 21% of their producers were people of color
  - 26% had been in operation for less than 10 years
FINDINGS: FOOD HUB PRODUCERS

Small and Mid-Sized Producers ($N=79$)

Generally speaking, farms and ranches with gross annual sales less than $500,000.

- None: 4%
- Few: 2%
- Some: 18%
- Most: 44%
- All: 32%

On average, 60% of a food hub’s total gross sales
### Findings: Food Hub Producers

#### Producer Practices (N=74)

<table>
<thead>
<tr>
<th>Practice</th>
<th>Prefer (%)</th>
<th>Require (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antibiotic-free</td>
<td>49%</td>
<td>43%</td>
</tr>
<tr>
<td>Free-range/Pasture raised</td>
<td>60%</td>
<td>35%</td>
</tr>
<tr>
<td>Chemical-free</td>
<td>65%</td>
<td>24%</td>
</tr>
<tr>
<td>Grass-fed</td>
<td>65%</td>
<td>22%</td>
</tr>
<tr>
<td>Non-certified, but practicing organic</td>
<td>73%</td>
<td>17%</td>
</tr>
<tr>
<td>Animal Welfare Approved</td>
<td>54%</td>
<td>13%</td>
</tr>
<tr>
<td>Certified Humane</td>
<td>63%</td>
<td>12%</td>
</tr>
<tr>
<td>USDA Certified Organic</td>
<td>60%</td>
<td>11%</td>
</tr>
<tr>
<td>Good Handling Practices certified</td>
<td>58%</td>
<td>9%</td>
</tr>
<tr>
<td>Certified Naturally Grown</td>
<td>51%</td>
<td>8%</td>
</tr>
<tr>
<td>Good Agricultural Practices certified</td>
<td>67%</td>
<td>8%</td>
</tr>
</tbody>
</table>

- **Percent of hubs that prefer**
- **Percent of hubs that require**
**FINDINGS: FOOD HUB PRODUCERS**

Changes in Producer’s Practices ($N=78$)

<table>
<thead>
<tr>
<th>Change in Practices</th>
<th>All or Most</th>
<th>Some</th>
<th>Few or None</th>
<th>Unsure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diversified their product offerings</td>
<td>51%</td>
<td>48%</td>
<td>15%</td>
<td>6%</td>
</tr>
<tr>
<td>Extended their growing season</td>
<td>45%</td>
<td>37%</td>
<td>18%</td>
<td>8%</td>
</tr>
<tr>
<td>Adopted more sustainable production methods</td>
<td>40%</td>
<td>37%</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>Increased financial literacy and/or business acumen</td>
<td>35%</td>
<td>40%</td>
<td>13%</td>
<td>20%</td>
</tr>
<tr>
<td>Hired additional people</td>
<td>31%</td>
<td>39%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Increased acreage</td>
<td>31%</td>
<td>47%</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>Became GAP certified</td>
<td>11%</td>
<td>20%</td>
<td>48%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Legend: 
- **All or Most**
- **Some**
- **Few or None**
- **Unsure**
## FINDINGS: FOOD HUB CUSTOMERS

### Food hub customers (N=82)

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<th>Customer Type</th>
<th>Percent of hubs that sell to</th>
<th>Average percent of total gross sales</th>
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<td>Hub's own storefront retail</td>
<td>20%</td>
<td>58%</td>
</tr>
<tr>
<td>Online store</td>
<td>16%</td>
<td>51%</td>
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<tr>
<td>CSA</td>
<td>29%</td>
<td>49%</td>
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<tr>
<td>Restaurants, caterers or bakeries</td>
<td>58%</td>
<td>33%</td>
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<tr>
<td>Farmers markets</td>
<td>18%</td>
<td>32%</td>
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<tr>
<td>Large supermarkets or supercenters</td>
<td>27%</td>
<td>29%</td>
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<td>Food cooperatives</td>
<td>24%</td>
<td>27%</td>
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<tr>
<td>Distributors</td>
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<td>18%</td>
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<td>Corner Stores/small grocery stores</td>
<td>39%</td>
<td>14%</td>
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<tr>
<td>K-12 school food service</td>
<td>35%</td>
<td>11%</td>
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<tr>
<td>Colleges/Universities</td>
<td>27%</td>
<td>9%</td>
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<tr>
<td>Buying clubs</td>
<td>24%</td>
<td>7%</td>
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<td>Hospitals</td>
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</tbody>
</table>
Revenue was significantly correlated with years in operation, with older hubs tending to have larger total revenue than younger hubs.
FINDINGS: FOOD HUB FINANCES

Business Efficiency Ratio = Expenses / Revenue

On average, the business efficiency ratio was 1.07 and the median was 1.00 for all hubs. (Range was .04 to 6.79)
### FINDINGS: FOOD HUB FINANCES

**Business efficiency ratios**

*By Operational Structure*

<table>
<thead>
<tr>
<th></th>
<th>N</th>
<th>Avg.</th>
<th>Median</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>All hubs</strong></td>
<td>75</td>
<td>1.09</td>
<td>1.00</td>
<td>0.04 – 6.79</td>
</tr>
<tr>
<td><strong>Non-profits</strong></td>
<td>29</td>
<td>1.20</td>
<td>1.00</td>
<td>0.04 – 6.79</td>
</tr>
<tr>
<td><strong>Cooperatives</strong></td>
<td>12</td>
<td>0.94</td>
<td>1.00</td>
<td>0.11 – 1.85</td>
</tr>
<tr>
<td><strong>For-profits</strong></td>
<td>34</td>
<td>1.06</td>
<td>1.00</td>
<td>0.33 – 3.53</td>
</tr>
</tbody>
</table>
# FINDINGS: FOOD HUB FINANCES

## Business efficiency ratios

*By Years in Operation*

<table>
<thead>
<tr>
<th>Years in Operation</th>
<th>N</th>
<th>Avg.</th>
<th>Median</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>All hubs</td>
<td>77</td>
<td>1.09</td>
<td>1.00</td>
<td>0.04 – 6.79</td>
</tr>
<tr>
<td>0-2 Years</td>
<td>24</td>
<td>1.14</td>
<td>1.00</td>
<td>0.11 - 4.21</td>
</tr>
<tr>
<td>3-5 Years</td>
<td>24</td>
<td>1.03</td>
<td>1.00</td>
<td>0.04 - 3.53</td>
</tr>
<tr>
<td>6-10 Years</td>
<td>8</td>
<td>1.68</td>
<td>1.05</td>
<td>0.29 - 6.79</td>
</tr>
<tr>
<td>11-15 Years</td>
<td>7</td>
<td>0.89</td>
<td>1.00</td>
<td>0.09 - 1.10</td>
</tr>
<tr>
<td>16-20 Years</td>
<td>4</td>
<td>0.82</td>
<td>0.96</td>
<td>0.33 - 1.01</td>
</tr>
<tr>
<td>Over 20 Years</td>
<td>10</td>
<td>0.74</td>
<td>0.94</td>
<td>0.17 - 1.00</td>
</tr>
</tbody>
</table>
FINDINGS: RELIANCE ON GRANT FUNDING

How dependent are food hubs on grant funding from public and/or private sources to carry out core food hub functions (aggregation, distribution and marketing of local food products) \((N=88)\)?

<table>
<thead>
<tr>
<th>Dependency Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highly dependent, 17%</td>
<td>17%</td>
</tr>
<tr>
<td>Somewhat dependent, 32%</td>
<td>32%</td>
</tr>
<tr>
<td>Not at all dependent, 51%</td>
<td>51%</td>
</tr>
</tbody>
</table>
FINDINGS: RELIANCE ON GRANT FUNDING

Factors with significant relationship to reliance on grants:

**Operational Structure** – Nonprofits more likely to be highly reliant on grant funding than other types of hubs.

**Number of producers** – Hubs with more producers tended to be less reliant on grants.
FINDINGS: RELIANCE ON GRANT FUNDING

Factors with significant relationship to reliance on grants (cont’d)

Some Activities -

• Employment opportunities for youth
• Accepting and/or matching SNAP benefits
• Nutrition or cooking education
• Mobile market
• Food safety and/or GAP training
• Production and post-harvest handling training
• Branding or labeling products
• Demonstration or incubator farm
• Brokering services

MSU Center for Regional Food Systems & The Wallace Center at Winrock International
FINDINGS: CHALLENGES & BARRIERS TO GROWTH

Top Challenges (N=79)

- Managing growth
- Balancing supply and demand
- Access to capital
- Finding appropriate technology
- Negotiating prices
- Meeting regulatory requirements
- Meeting other buyer specifications
- Finding reliable seasonal and/or PT staff

Legend:
- Greatest Challenge
- Second Greatest Challenge
- Third Greatest Challenge
FINDINGS: CHALLENGES & BARRIERS TO GROWTH

Top Challenges (N=79)

- Managing growth
- Balancing supply and demand
- Access to capital
- Finding appropriate technology
- Negotiating prices
- Meeting regulatory requirements
- Meeting other buyer specifications
- Finding reliable seasonal and/or PT staff

Greatest Challenge
Second Greatest Challenge
Third Greatest Challenge

20 hubs
FINDINGS: CHALLENGES & BARRIERS TO GROWTH

Barrier to Growth (N=76)

- Increasing staff: 49%
- Securing more product supply: 47%
- Increasing truck/delivery capacity: 43%
- Increasing warehouse/storage space: 41%
- Securing capital: 33%
- Consumer education: 27%
- Business development assistance: 24%
- Increase availability of processing: 20%
- No Barriers: 4%

MSU Center for Regional Food Systems & The Wallace Center at Winrock International
CONCLUDING THOUGHTS

- FOOD HUBS ARE FINANCIALLY VIABLE BUSINESSES
  - Food hubs with varying years of service and operational structures (including nonprofits) were observed generating a positive cash flow.
  - Almost all food hubs believe that the demand for their products and services is growing.
CONCLUDING THOUGHTS

• FOOD HUBS ARE FINANCIALLY VIABLE BUSINESSES
  • Food hubs with varying years of service and operational structures (including nonprofits) were observed generating a positive cash flow.
  • Almost all food hubs believe that the demand for their products and services is growing.

• BUT CHALLENGES STILL EXIST
  • Hubs faced barriers that kept them from meeting this demand.
    • Managing growth
    • Balancing supply and demand
CONCLUDING THOUGHTS

More Research Needed:

• On less successful food hubs

• On food hub partnerships with other/parent organizations

• On the impacts that food hubs are having on producers

• On the impact that management skills have on food hub success
The full report of survey findings is available in 2 places:

CRFS website: [www.foodsystems.msu.edu](http://www.foodsystems.msu.edu)
NFGN’s food hub website: [www.foodhub.info](http://www.foodhub.info)

Other topics covered in full report include:
- Food hubs values and mission statement analysis
- Exploration of local and regional aspects of food hubs Infrastructure use
- Food hub expenses
- Revenue sources used to begin and continue operations
- Services and activities of food hubs
- Comparisons of some of our findings with a 2011 survey from the Collaboration
Presentation Outline

- Technical Orientation
- Welcome / Introduction
- The Survey: Motivation
- The Survey: Findings
- The Survey: Implications

John Fisk
Wallace Center at Winrock International

- Questions and Answers
- Upcoming Opportunities, etc.
NATIONAL FOOD HUB CONFERENCE

Save the date!
March 26-28
Raleigh/Durham, NC

Pre-conference tours, panels, networking, technical assistance opportunities, more...

Details soon.
Presentation Outline

- Technical Orientation
- Welcome / Introduction
- The Survey: Motivation
- The Survey: Findings
- The Survey: Implications
- Questions and Answers

Upcoming Opportunities, etc.
Webinars are Archived

TOPICS!

http://ngfn.org/webinars
NGFN Webinars

- 3rd Thursday of each month
  3:30p EST (12:30p PST)

- Oct 17 - Food Hubs and Farm to School
- Nov 21 - Tools for Improving Farmer Financial Skills
- Dec 12 – Food Banks as Regional "Good Food" Partners

http://ngfn.org/webinars
Two Notable Websites

- **www.FoodHub.info**
  - Food Hub “hub”
  - Research, case studies, list and map of hubs across the country, much more.

- **www.FoodshedGuide.org**
  - Case study-based business and financial training
  - Includes a “One Page Business Plan” and a “One Page Financial Plan”
Get Connected, Stay Connected

http://ngfn.org/database

National Good Food Network Database
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