Executive Summary

FINDINGS OF THE 2025 NATIONAL FOOD HUB SURVEY

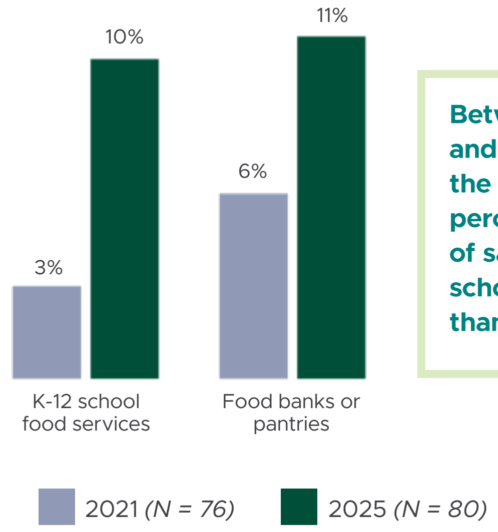
The Michigan State University Center for Regional Food Systems (CRFS) has led the National Food Hub Survey research project since 2012. This report provides key insights from the sixth national survey, which captured food hub experiences in the 2024 calendar year. The report is organized into six topical sections. This brief is part of the upcoming ***Findings of the 2025 National Food Hub Survey report*.**

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**

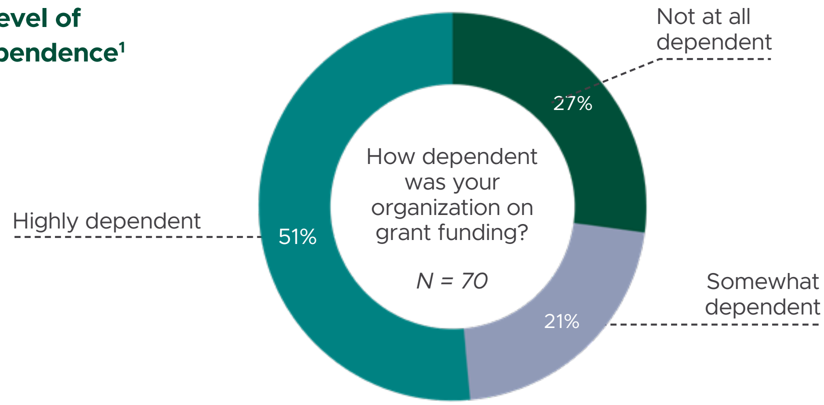


Between 2021 and 2025, the average percentage of sales to schools more than tripled.

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[1]**



- 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 and 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

1 Numbers presented in this figure were rounded to the nearest whole number so not all percentages add up to 100%.

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.**

This executive summary is a precursor to **the full report** that represents data from 100 American food hub organizations from 27 states and the District of Columbia. The data adds to previous surveys and presents findings based on six national food hub surveys from 2013 to 2025 that collectively paint a picture of food hub transformation, particularly during and after the COVID-19 pandemic. **Food hubs dramatically increased their sales of locally produced food to food banks and pantries and schools when there were disruptions in the global food supply during the pandemic.** This survey suggests that there was, and continues to be, post-pandemic, a great dependence on incentive and technical assistance programs to drive food hub sales.

This executive summary was authored by Jude Barry of MSU Center for Regional Food Systems (CRFS), Kathryn Colasanti of the University of Michigan Program Evaluation Group (UM PEG), and Sam Stokes of the University of Wisconsin School of Veterinary Medicine. The data presented here builds upon the findings of the 2025 National Food Hub Survey conducted by CRFS and PEG. These resources received communications guidance from Melissa Hill and Emma Beauchamp of MSU CRFS, copy editing from Jen Anderson of Clearing Blocks Editing Services, and design by Melissa Hill. This work was generously funded by the W.K. Kellogg Foundation.

To learn more, visit foodsystems.msu.edu/nationalfoodhubsurvey

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