NATIONAL FOOD HUB SURVEY 2015

November 19, 2015
Presentation Outline

- Technical Orientation
- Welcome

**Jeff Farbman**  
*Wallace Center at Winrock International*

- Some Context
- Introduction to the Survey
- The Data!
- Summation
- 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
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 Data and Analysis and outcomes of the NGFN and have enacted laws or regulation which further the Network goals.

http://ngfn.org | contact@ngfn.org
NGFN Food Hub Conference 2016

• The ONLY National Food Hub Conference

• March 30 - April 1
  o Pre-conference trainings Mar 29

• Trainings, Tours, Panels, Networking, Curbside Consulting, Workshops, and more!
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Some Context

Dr. John Fisk
Wallace Center at Winrock International

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GROWING OPPORTUNITY FOR LOCAL & REGIONAL FOOD

From a buzzed-about consumer trend to a central growth prospect for grocery retailers and restaurants alike, local is now an established part of the U.S. food market—and is still growing. A.T. Kearney Inc.

From $4.8 billion in 2008 to $6.1 billion 2012 - up 27% (USDA/ARMS)

From $9 billion in 2013 to $12 billion in 2014 - up 33% (AT Kearney)

Predicted 9% annual growth into 2018 - (AT Kearney)

*https://www.atkearney.com/consumer-products-retail/firmly-rooted/full-paper/-/asset_publisher/SSUkO0zy0vnu/content/firmly-rooted-the-local-food-market-expands/10192
EXPANDING MARKET CHANNELS FOR LOCAL & REGIONAL FOOD

Increase in local & regional marketing channels

Since 2007, growth in--

- Farmers’ markets (2014): 8,268 farmers markets, up 180%
- Regional food hubs (2014): Over 300 food hubs (2014) up
- School Districts with farm to school programs (2011-12 school year): 4,322 school districts with farm to school, up 430%

Sources: USDA, Agricultural Marketing Service, Food Nutrition Service; National Food to School Network.
Food Hubs Growing in the Value Chain

- Approximately **350 hubs** nationwide

- Estimated total revenue of **$0.5 billion**

- **98% of food hubs** expect *increased demand* for local food products in the next two years
Keeping the Momentum

• Continue to build the case for regional food as economic and community development

• Continue to gather data on business and social impact performance
  • National Food Hub Survey and Food Hub Financial Benchmarking Study
  • For hub operators and investor use

• Expand our understanding of how to create Food Value Chains and role of hubs
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Rich Pirog
Center for Regional Food Systems, Michigan State University

• The Data!
• Summation
• Questions and Answers
• Upcoming Opportunities, etc.
Mission
Develop regionally integrated, sustainable regional food systems

Work
Michigan Good Food Charter, food access and health, **food hubs**, farm to institution, healthy food financing, food systems planning and food policy, beginning farmers, organic production and marketing

**Michigan Food Hub Network – established 2012**
**National Food Hub Survey – 2013 (with Wallace)**
Michigan Good Food Charter – 2010-2020

“Good Food” policy framework
food that is affordable, fair,
green, and healthy

6 goals & 25 agenda priorities

www.michiganfood.org

Public-private loan and
business assistance fund to
supply good food to
underserved areas in Michigan

MSU Center for Regional Food Systems  @MSUCRFS
Collective Impact & Shared Measurement
Michigan Good Food Charter

- Collaborative project to build the case for collectively measuring statewide food systems change in Michigan

Good Food Charter Goals

1. Institutions source 20% locally
2. Farmers will supply 20% of food purchases, fair wages
3. Generate new agri-food businesses
4. 80% of Michigan residents will have access to healthy food
5. School nutrition standards
6. Food and agricultural education pre-K through 12th grade
Presentation Outline

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- Introduction to the Survey

The Data!

Jill Hardy
Center for Regional Food Systems, Michigan State University

- Summation
- Questions and Answers
- Upcoming Opportunities, etc.
FINDINGS OVERVIEW:
THE 2015 NATIONAL FOOD HUB SURVEY

Jill Hardy
hardyjil@msu.edu
METHODS

How was the survey conducted?
METHODS

• Most 2013 questions were re-asked
• Additional topics and clarification questions were added
• Data was collected between March 18, 2015 and May 17, 2015
• Sample members were sent multiple, varied requests for participation
• Initially sent to 547 email addresses
• Anonymous link was distributed by non-project affiliated partners (8 surveys)
• Duplicate hubs and ineligible enterprises were removed
• Response rate is 33% (142 surveys)
• 151 complete and partial surveys used in analysis
## PERCENTAGE OF TOTAL SURVEY RESPONSES BY CENSUS REGION

<table>
<thead>
<tr>
<th>Census Region</th>
<th>Percent of total responses 2013 (n=107)</th>
<th>Percent of total responses 2015 (n=151)</th>
</tr>
</thead>
<tbody>
<tr>
<td>East North Central</td>
<td>11%</td>
<td>18%</td>
</tr>
<tr>
<td>East South Central</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Middle Atlantic</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Mountain</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>New England</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>Pacific</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>South Atlantic</td>
<td>21%</td>
<td>17%</td>
</tr>
<tr>
<td>West North Central</td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>West South Central</td>
<td>5%</td>
<td>3%</td>
</tr>
</tbody>
</table>
OPERATIONAL CHARACTERISTICS

What did hub operations look like in 2015?
FOOD HUBS BY LEGAL STRUCTURE

- Publicly owned: 3%
- Non-profit: 36%
- Cooperative: 19%
- For profit: 38%
- Other: 4%

(n=151)
## COMPARISON OF HUB LEGAL STRUCTURE COLLECTED ACROSS SURVEYS/DATABASES

<table>
<thead>
<tr>
<th>Category</th>
<th>USDA*</th>
<th>2011**</th>
<th>2013***</th>
<th>2015****</th>
</tr>
</thead>
<tbody>
<tr>
<td>For profit</td>
<td>51%</td>
<td>35%</td>
<td>47%</td>
<td>38%</td>
</tr>
<tr>
<td>Cooperative</td>
<td>31%</td>
<td>27%</td>
<td>13%</td>
<td>19%</td>
</tr>
<tr>
<td>Non-profit</td>
<td>28%</td>
<td>36%</td>
<td>34%</td>
<td>36%</td>
</tr>
<tr>
<td>Publicly owned</td>
<td>1%</td>
<td>N/A</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>4%</td>
</tr>
</tbody>
</table>

* USDA Food Hub Directory as of November 2016, n=155
** NGFN n=45
*** n=125
**** n=151
FOOD HUBS BY BUSINESS STRUCTURE

(n=151)

Hybrid 52%

Farm to business/institution 29%

Farm to consumer 20%
AGE OF HUBS

2013 (n=106)

- less than 3 years: 32%
- 3-6 years: 11%
- 6-11 years: 13%
- 11-16 years: 10%
- 16-20 years: 4%
- more than 20 years: 5%

2015 (n=149)

- less than 3 years: 31%
- 3-6 years: 19%
- 6-11 years: 32%
- 11-16 years: 8%
- 16-20 years: 5%
- more than 20 years: 11%
## EMPLOYEES

<table>
<thead>
<tr>
<th></th>
<th>2013, n=77</th>
<th>2015 all hubs, n=128</th>
<th>2015 hubs 2 or more years old n=86</th>
<th>hubs completing both years, n=40 2013</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of employees</td>
<td>1,184</td>
<td>2,187</td>
<td>1,675</td>
<td>564</td>
<td>843</td>
</tr>
<tr>
<td>Mean</td>
<td>15</td>
<td>12</td>
<td>19</td>
<td>14</td>
<td>21</td>
</tr>
<tr>
<td>Median</td>
<td>6</td>
<td>2</td>
<td>9</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>Minimum, Maximum</td>
<td>0,165</td>
<td>0,170</td>
<td>1,189</td>
<td>1,155</td>
<td>1,189</td>
</tr>
</tbody>
</table>
NUMBER OF PRODUCT CATEGORIES CARRIED BY HUBS

(n=110)

- 1 category: 19%
- 2 to 3 categories: 12%
- 4 to 5 categories: 23%
- 6 or more categories: 46%
PERCENT OF FOOD HUBS THAT CARRY VARIOUS PRODUCT CATEGORIES

- Fresh produce and herbs: 93% (2013) vs. 92% (2015)
- Meat and poultry: 65% (2013) vs. 65% (2015)
- Eggs: 60% (2013) vs. 65% (2015)
- Other processed or value added products: 52% (2013) vs. 53% (2015)
- Milk and other dairy products: 50% (2013) vs. 51% (2015)
- Grains, beans, flour: 37% (2013) vs. 51% (2015)
- Processed produce: 38% (2013) vs. 46% (2015)
- Baked goods/bread: 41% (2013) vs. 35% (2015)
- Non-food items: 29% (2013) vs. 24% (2015)
- Coffee/tea: 21% (2013) vs. 28% (2015)
- Fish: 13% (2013) vs. 12% (2015)
FARM AND PROCESSOR SUPPLIERS

What are the characteristics of the farms, ranches and processors supplying food hubs?
FARM AND PROCESSOR SUPPLIERS

- 79 hubs enumerated 6255 suppliers
- Mean number of suppliers in 2013 and 2015 was 80
- Median number of suppliers in 2015 was 36

Same hub comparison (n=28)

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mean</strong></td>
<td>72</td>
<td>115</td>
</tr>
<tr>
<td><strong>Median</strong></td>
<td>38</td>
<td>52</td>
</tr>
<tr>
<td><strong>Minimum/ Maximum</strong></td>
<td>6/ 500</td>
<td>2/1500</td>
</tr>
</tbody>
</table>
FARM AND PROCESSOR SUPPLIER TYPES

(n=111)

Farms or ranches not owned or managed by the hub: 91%
Food processors not owned by the hub: 60%
A different food distributor: 32%
The food hub's own farms, ranches, enterprises: 25%
Non-food related businesses: 15%
SMALL AND MID-SIZED FARMS/RANCHES SUPPLYING HUBS

- All: 37% (n=99)
- Most: 55%
- Some: 6%
- Few: 1%
- None: 1%
FINANCES
Are hubs financially viable businesses?
GROSS REVENUE

2015 (n=113)

- $100,000 or less: 19%
- $100,001-$200,000: 15%
- $200,001-$500,000: 25%
- $500,001-$1,000,000: 6%
- $1,000,001-$2,000,000: 19%
- $2,000,001-$7,000,000: 8%
- over $7,000,000: 8%

2013 (n=104)

- $100,000 or less: 17%
- $100,001-$200,000: 15%
- $200,001-$500,000: 22%
- $500,001-$1,000,000: 14%
- $1,000,001-$2,000,000: 13%
- $2,000,001-$7,000,000: 6%
- over $7,000,000: 13%
SALES REVENUE BY PRODUCT CATEGORY

- Fresh produce: $0.58
- Meat, poultry, fish: $0.18
- Milk and dairy: $0.05
- Other: $0.19
- Other processed: $0.05
- Eggs: $0.04
- Processed produce: $0.04
- Grains, beans, flour: $0.03
- Other: $0.03
## NON-SALES REVENUE

<table>
<thead>
<tr>
<th>Revenue Source</th>
<th>2015</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent of food hubs with revenue source (n=61)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation grants</td>
<td>46%</td>
<td>18% (28)</td>
</tr>
<tr>
<td>Other services/operations of the food hub</td>
<td>34%</td>
<td>8% (21)</td>
</tr>
<tr>
<td>Donations from individuals</td>
<td>28%</td>
<td>4% (17)</td>
</tr>
<tr>
<td>Other donations</td>
<td>26%</td>
<td>5% (16)</td>
</tr>
<tr>
<td>Federal government funding</td>
<td>25%</td>
<td>15% (15)</td>
</tr>
<tr>
<td>Membership fees</td>
<td>25%</td>
<td>4% (15)</td>
</tr>
<tr>
<td>Income from other programs of the organization</td>
<td>18%</td>
<td>8% (11)</td>
</tr>
<tr>
<td>Renting space to other businesses</td>
<td>16%</td>
<td>8% (10)</td>
</tr>
<tr>
<td>State government funding</td>
<td>15%</td>
<td>13% (9)</td>
</tr>
<tr>
<td>Local government funding</td>
<td>13%</td>
<td>7% (8)</td>
</tr>
<tr>
<td>Donations from businesses/organizations</td>
<td>13%</td>
<td>3% (8)</td>
</tr>
<tr>
<td>In-kind support</td>
<td>10%</td>
<td>18% (6)</td>
</tr>
<tr>
<td>Commissions and broker fees not accounted for in product sales</td>
<td>10%</td>
<td>15% (6) Not asked</td>
</tr>
</tbody>
</table>
EXPENSES

- Food or product purchases accounted for 59% (2015) vs. 61% (2013) of expenses
- Payroll accounted for 23% (2015) vs. 24% (2013) of expenses
- All other expenses categories were 5% or less of total expenses
- Profile of hub expenses in both 2015 and 2013 was similar
Operating Expense Ratio (OER) = \frac{\text{Total Operating Expenses}}{\text{Total Gross Revenue}}

- OER < 1.00 (70%)
- OER = 1 (5%)
- OER > 1 (25%)
## OPERATING EXPENSE RATIO

<table>
<thead>
<tr>
<th></th>
<th>n</th>
<th>Avg.</th>
<th>Median</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>All hubs 2013</td>
<td>77</td>
<td>1.09</td>
<td>1.00</td>
<td>0.04-6.79</td>
</tr>
<tr>
<td>All hubs 2015</td>
<td>86</td>
<td>0.88</td>
<td>0.94</td>
<td>0.01-3.10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hubs with OER for both years</th>
<th>n</th>
<th>Avg.</th>
<th>Median</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>28</td>
<td>.96</td>
<td>1.00</td>
<td>0.11-1.85</td>
</tr>
<tr>
<td>2015</td>
<td>.84</td>
<td>.99</td>
<td>0.04-1.50</td>
<td></td>
</tr>
</tbody>
</table>
FOOD SAFETY

How are hubs addressing food safety?
## Hub Requirements for Producer/Supplier Food Safety

<table>
<thead>
<tr>
<th>Category</th>
<th>Required</th>
<th>Required for Some</th>
<th>Not Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Farmers and ranchers (89)</td>
<td>28%</td>
<td>25%</td>
<td>47%</td>
</tr>
<tr>
<td>Non-farmer producers and suppliers (73)</td>
<td>23%</td>
<td>26%</td>
<td>51%</td>
</tr>
<tr>
<td>Hub's incubator or hub owned farm (16)</td>
<td>13%</td>
<td></td>
<td>31%</td>
</tr>
</tbody>
</table>
HUB PREFERENCES FOR PRODUCER/SUPPLIER FOOD SAFETY CERTIFICATION

- Good Agricultural Practices (GAP) or group GAP (102)
  - No preference: 17%
  - Prefer: 69%
  - Required: 14%

- Good Handling Practices (GHP) (93)
  - No preference: 27%
  - Prefer: 67%
  - Required: 6%
## FOOD SAFETY SERVICES FOR PRODUCERS/SUPPLIERS

<table>
<thead>
<tr>
<th>Service Description</th>
<th>Percent of Hubs Offering</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assist producers and suppliers in developing or reviewing food safety plan</td>
<td>61%</td>
</tr>
<tr>
<td>Incentivize producer engagement with food safety</td>
<td>35%</td>
</tr>
<tr>
<td>Provides staff person responsible for food safety training and compliance by producers and suppliers</td>
<td>33%</td>
</tr>
<tr>
<td>Assist with or provides GAP training and certification</td>
<td>43%</td>
</tr>
</tbody>
</table>
MISSION AND VALUES
Are hubs engaging in social mission related activities?
<table>
<thead>
<tr>
<th>Activity</th>
<th>Strongly Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increasing small and medium sized farmers'/ranchers' access to markets</td>
<td>90%</td>
</tr>
<tr>
<td>Promoting environmentally sensitive production practices</td>
<td>67%</td>
</tr>
<tr>
<td>Promoting good animal welfare practices</td>
<td>66%</td>
</tr>
<tr>
<td>Improving human health in your community or region</td>
<td>63%</td>
</tr>
<tr>
<td>Ensuring food hub employees receive a fair wage</td>
<td>62%</td>
</tr>
<tr>
<td>Increasing healthy or fresh food access to economically disadvantaged communities</td>
<td>40%</td>
</tr>
<tr>
<td>Increasing minority producers'/suppliers' access to market</td>
<td>23%</td>
</tr>
<tr>
<td>Addressing racial disparities through access to healthy food</td>
<td>19%</td>
</tr>
</tbody>
</table>
NON-REVENUE GENERATING ACTIVITIES

n=150

- Food donations to local food pantries/banks: 83%
- Education about community and food systems issues: 79%
- Nutrition or cooking education: 51%
- Health screenings: 6%
NETWORKS

Where do hubs get business advice?
## SOURCES OF INFORMATION

<table>
<thead>
<tr>
<th>Source</th>
<th>Percent of hubs mentioning source</th>
<th>Average rank assigned to sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informal networks</td>
<td>52%</td>
<td>2.8</td>
</tr>
<tr>
<td>Formal community of practice</td>
<td>47%</td>
<td>1.7</td>
</tr>
<tr>
<td>Annual meetings or conferences</td>
<td>44%</td>
<td>3.4</td>
</tr>
<tr>
<td>University’s educational resources</td>
<td>39%</td>
<td>2.8</td>
</tr>
<tr>
<td>Federal department’s educational resources</td>
<td>36%</td>
<td>3.1</td>
</tr>
<tr>
<td>Non-profit organization’s educational resources</td>
<td>32%</td>
<td>3.2</td>
</tr>
<tr>
<td>State government educational resources</td>
<td>27%</td>
<td>3.7</td>
</tr>
<tr>
<td>Food policy council</td>
<td>16%</td>
<td>4.2</td>
</tr>
<tr>
<td>Local Government educational resources</td>
<td>10%</td>
<td>5.3</td>
</tr>
</tbody>
</table>
CHALLENGES AND OPPORTUNITIES

In what areas are hubs experiencing road blocks or seeing growth potential?
### BARRIERS TO GROWTH

*n=106*

<table>
<thead>
<tr>
<th>Barrier</th>
<th>2015 %</th>
<th>2013 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increasing staff</td>
<td>42%</td>
<td>49%</td>
</tr>
<tr>
<td>Securing more product supply</td>
<td>57%</td>
<td>47%</td>
</tr>
<tr>
<td>Securing capital</td>
<td>33%</td>
<td>46%</td>
</tr>
<tr>
<td>Increasing truck capacity/delivery</td>
<td>45%</td>
<td>43%</td>
</tr>
<tr>
<td>Increasing warehouse space</td>
<td>43%</td>
<td>41%</td>
</tr>
<tr>
<td>Increasing availability of processing</td>
<td>32%</td>
<td>20%</td>
</tr>
<tr>
<td>Consumer education</td>
<td>32%</td>
<td>27%</td>
</tr>
<tr>
<td>Business development assistance</td>
<td>20%</td>
<td>24%</td>
</tr>
</tbody>
</table>
## OPPORTUNITIES FOR GROWTH

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Many opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSA (68)</td>
<td>46%</td>
</tr>
<tr>
<td>Restaurants, caterers, bakeries (95)</td>
<td>43%</td>
</tr>
<tr>
<td>Hub's own storefront retail (52)</td>
<td>33%</td>
</tr>
<tr>
<td>Online stores (80)</td>
<td>32%</td>
</tr>
<tr>
<td>Colleges/universities (86)</td>
<td>30%</td>
</tr>
<tr>
<td>K-12 food service (85)</td>
<td>29%</td>
</tr>
<tr>
<td>Farmers' markets (54)</td>
<td>28%</td>
</tr>
<tr>
<td>Food cooperatives of buying clubs (90)</td>
<td>23%</td>
</tr>
<tr>
<td>Hospitals (86)</td>
<td>23%</td>
</tr>
<tr>
<td>Large retail grocery stores (83)</td>
<td>23%</td>
</tr>
<tr>
<td>Distributors (84)</td>
<td>20%</td>
</tr>
<tr>
<td>Corner stores/ small grocery (89)</td>
<td>18%</td>
</tr>
<tr>
<td>Pre-K food service (85)</td>
<td>15%</td>
</tr>
<tr>
<td>Food processors (82)</td>
<td>9%</td>
</tr>
<tr>
<td>Mobile retail units (57)</td>
<td>7%</td>
</tr>
<tr>
<td>Convenience stores (68)</td>
<td>7%</td>
</tr>
</tbody>
</table>
THANK YOU!

Contact:
Jill Hardy
hardyjil@msu.edu

Co-authors
Jeff Farbman
Micaela Fisher
John Fisk
Mike Hamm
Rich Pirog

Reviewer
Jim Barham
Gary Matteson
Presentation Outline

- Technical Orientation
- Welcome
- Some Context
- Introduction to the Survey
- The Data!

**Summation**

Dr. John Fisk  
Wallace Center at Winrock International

- Questions and Answers
- Upcoming Opportunities, etc.
Positive Trends

• New hubs are emerging, many existing are growing in revenue, products, suppliers, employees, partnerships

• Hubs are becoming more financially sound, demonstrating it as a viable model

• Hubs are making a difference
Momentum: Addressing Challenges

Supply Constraints → Education, Resources, VC Facilitation

Responding to Growth Opportunities → Business and Capital

Food Safety → Group GAP, Sector focused organizations
FLOW OF CAPITAL

- **Pipeline of investment ready hubs**: Local and regional food businesses need **business support services**

- Innovation and partnerships that provide greater and **more effective deployment of capital**

- Investment in **ongoing data collection** on the sector that will inform policy and investment

- Support for **regional efforts that coordinate and focus resources** across agencies and the private sector for greater impact
Momentum: Addressing Challenges

Networking and Capacity Building

• National Food Hub Conference: Atlanta March 28-April 1, 2016
• UVM Food Hub Management Program
• Emerging and Early Food Hub Development Workshop
• State Networks
Webinars are Archived

TOPICS!

http://ngfn.org/webinars
NGFN Webinars

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

http://ngfn.org/webinars

• Dec 17: GroupGAP: USDA's New Cooperative Approach to Farmer Food Safety Certification
The ONLY National Food Hub Conference

March 30 - April 1
- Pre-conference trainings Mar 29

Trainings, Tours, Panels, Networking, Curbside Consulting, Workshops, and more!
Get Connected, Stay Connected

http://ngfn.org/database

National Good Food Network Database
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