

PROGRAM MANAGER SERVICES FOR

ALACHUA COUNTY'S FRESH FOOD PATHWAYS PROGRAM

RFP 24-465-LC

MARKET RESEARCH REPORT OVERVIEW



Prepared by:
Good Food Partners / New Venture Advisors
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Everyone deserves a chance to grow.

The following “Market Research Report” is deliverable 1.4, summarizing Phase 1: Market Analysis portion of Alachua County’s Fresh Food Pathways Program conducted by Good Food Partners, a collaboration between New Venture Advisors (NVA) and Grace Grows, from January and August 2025.

New Venture Advisors is a consulting firm that specializes in food system planning and infrastructure development. Since 2009, NVA has helped more than 100 communities across North America identify strategies to develop food systems, food enterprises, and food policies that are good for farmers, food entrepreneurs, consumers, and the intermediaries that connect them.

Since 2015, **Grace Grows** has been doing community development work with leaders and stakeholders in East Gainesville to address food accessibility. Managing over 2,700 volunteer hours each year, Grace Grows has a mission to empower individuals who are experiencing homelessness or food insecurity through horticulture. In collaboration with 15 community advisors Grace Grows recently conducted the “Southeast Gainesville Community Food Project” that informs how the community desires food access and sovereignty initiatives to be conducted. The non-profit also designed the Grace Community Engagement Toolkit to help neighborhoods, and their residents leverage the assets and strengths available to create equitable and sustainable solutions to various social issues.

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Study Objective

Develop a Plan to create a successful **Food Hub** that benefits the community, local farmers, and institutional food purchasers.

Project Goal

To deploy a full-scale food hub in five years that will transform the local food economy; support direct relationships between consumers, small farmers, and food entrepreneurs; address the root cause of issues and inequities in the food system; and do so in a way that increases community engagement, control, and health.

Part 1: Market Research Objectives

- **Evaluate existing programs and resources** supporting the local food economy and food access that may support or be in competition to a food hub.
- **Assess market need and interest** in the potential food hub components.
- **Identify resources to support the project** (i.e. funding, locations, existing programming).
- **Identify key partner organizations** and potential spoke partners.

PROJECT OVERVIEW

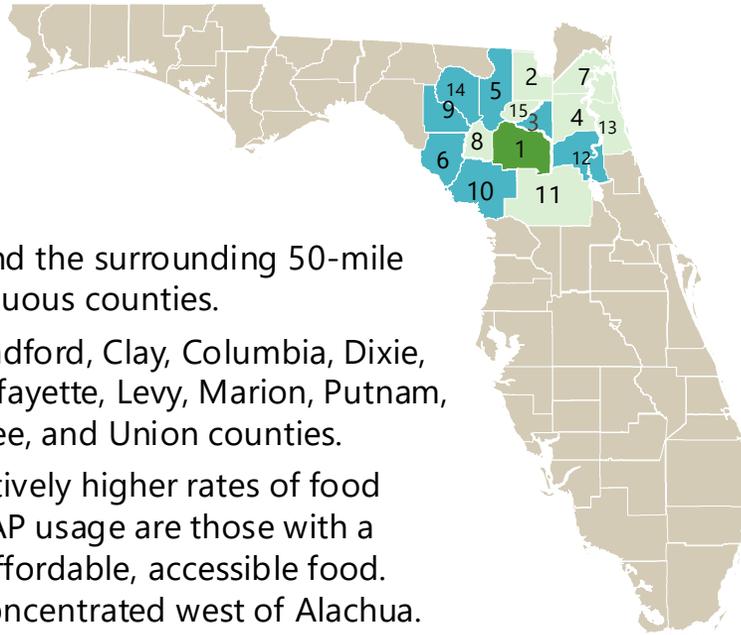
WHAT IS A FOOD HUB?

- A **food hub** is a business or organization (*a for-profit or not-for-profit*) that supports the aggregation, sales, distribution, marketing, and/or logistics of local produce and products.
- The purpose of a food hub is to support the development/growth of local agriculture by creating new opportunities for **local farmers and producers** to **sell their products**.
- **Food hubs connect local/regional farms and small businesses to larger buyers** like grocery stores, restaurants, and institutions.

Potential components of a Food Hub

- **Aggregation & storage of food** (produce, meat, or value-added products) from local growers & producers.
- **Distribution** and logistics support to commercial vendors (grocery, institutions, & retail foodservice)
- **Long-term production & processing** for specific food businesses across the value chain
- Consumer retail footprint such as a **farmer's market or permanent storefront**.
- **Shared & flexible kitchen space** to support early-stage value added or foodservice businesses.
- **Community & office space** targeting food system organizations.
- **Workforce development programs** & training for food and agriculture.

RESEARCH PARAMETERS



The study area:

- Alachua County and the surrounding 50-mile radius of all contiguous counties.
- Includes Baker, Bradford, Clay, Columbia, Dixie, Duval, Gilchrist, Lafayette, Levy, Marion, Putnam, St. Johns, Suwannee, and Union counties.
- Counties with relatively higher rates of food insecurity and SNAP usage are those with a greater need for affordable, accessible food. They are largely concentrated west of Alachua.

Alachua county population:

284,030

Area population:

2.6 million, approx. 11% of Florida's population.

- Alachua county
- Above avg food insecurity
- Study area counties

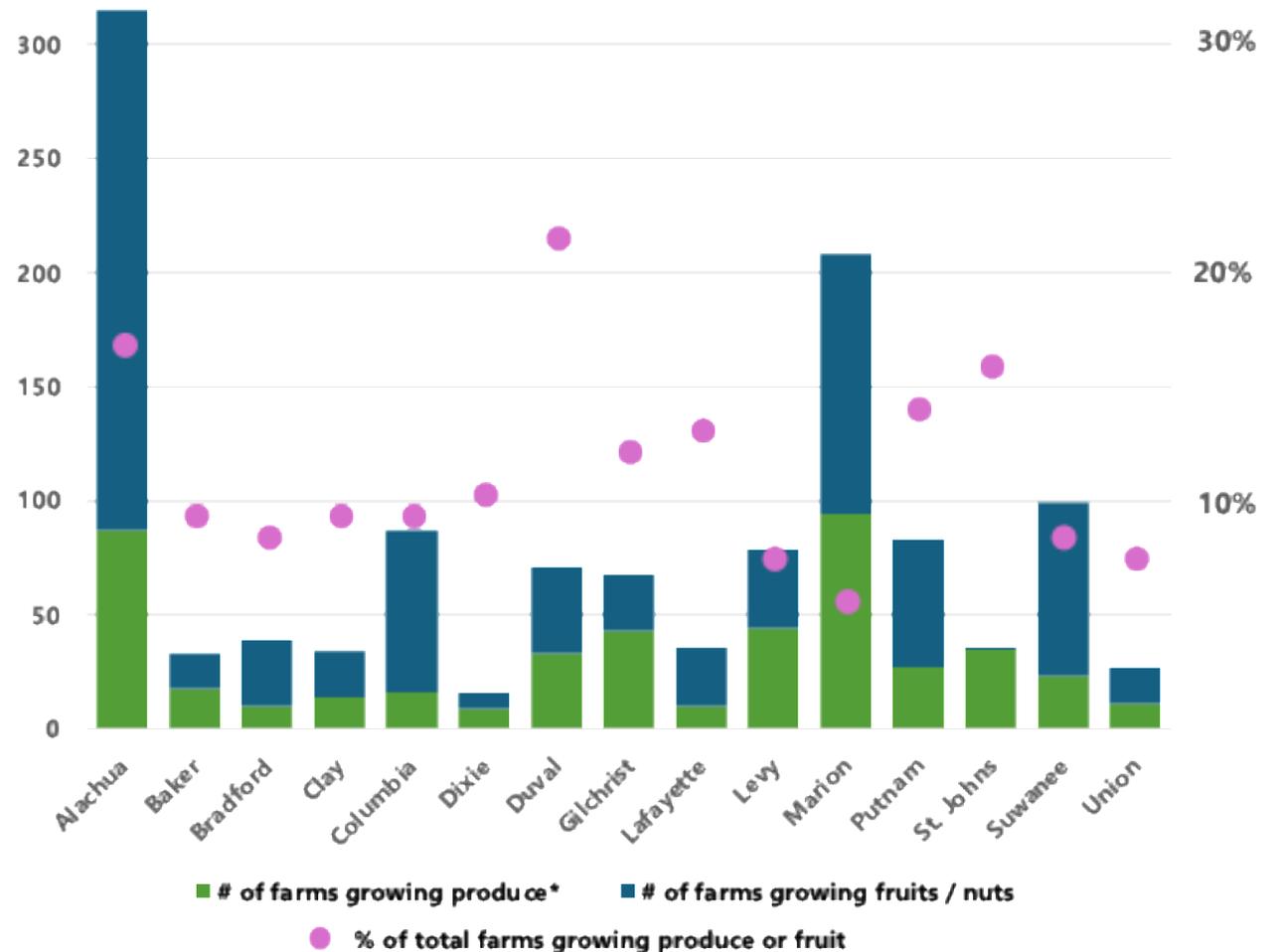
County	Population	Median income	Poverty rate	Unemployment rate	Food insecurity rate
Alachua	284,030	\$58,354	19.87%	4.05%	13.6%
Baker	27,969	\$67,872	13.06%	3.80%	12.7%
Bradford	27,816	\$54,759	6.48%	4.34%	15.3%
Clay	226,589	\$85,594	8.40%	3.84%	11.1%
Columbia	71,908	\$53,985	15.84%	4.45%	14.8%
Dixie	16,737	\$45,057	15.90%	4.80%	16.2%
Duval	1,016,540	\$70,533	12.91%	3.84%	12.7%
Gilchrist	18,070	\$56,823	14.81%	3.97%	14.3%
Lafayette	8,107	\$57,852	19.84%	4.80%	15.8%
Levy	43,268	\$49,933	15.52%	4.40%	15.0%
Marion	396,415	\$54,190	14.44%	4.58%	13.8%
Putnam	74,731	\$46,161	22.04%	4.58%	17.3%
St. Johns	306,841	\$103,017	6.44%	3.70%	9.7%
Suwannee	43,881	\$49,729	15.45%	4.42%	14.9%
Union	15,524	\$64,043	14.29%	4.86%	14.3%
Florida	22,379,312	\$53,267.00	12.60%	2.90%	13.2%

Sources: U.S. Census Bureau 2020 *QuickFacts*; American Community Survey 5-Year Data (2017-2022); United Way of Florida 2022 *ALICE in Florida*

FARMLAND USAGE

- The share of farms producing non-commodity crops ranges from approximately 10% in places such as Union and Suwanee counties to 23% in Duval county.
- By acreage, top crops in the region include forage (hay/haylage), peanuts, vegetables, corn, and watermelons.
- Top livestock include broilers and other meat-type chickens, cattle / calves, and layers (e.g., hens).
- The larger proportion of fruit production over produce is aligned with a climate conducive to citrus and fruit production and significant wholesale infrastructure to support those industries.

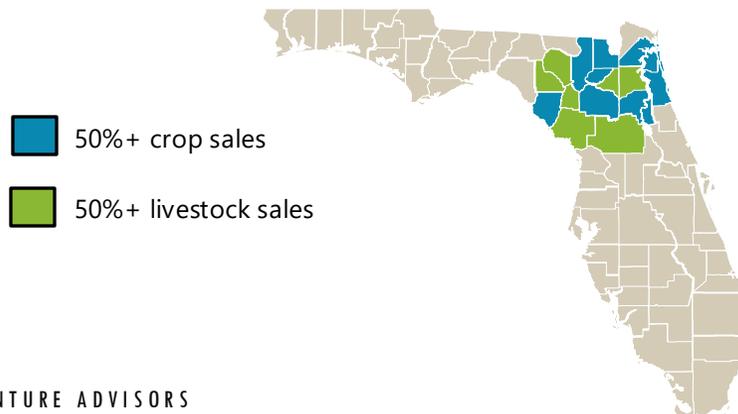
Number and percentage of produce, fruit & nut farms by county



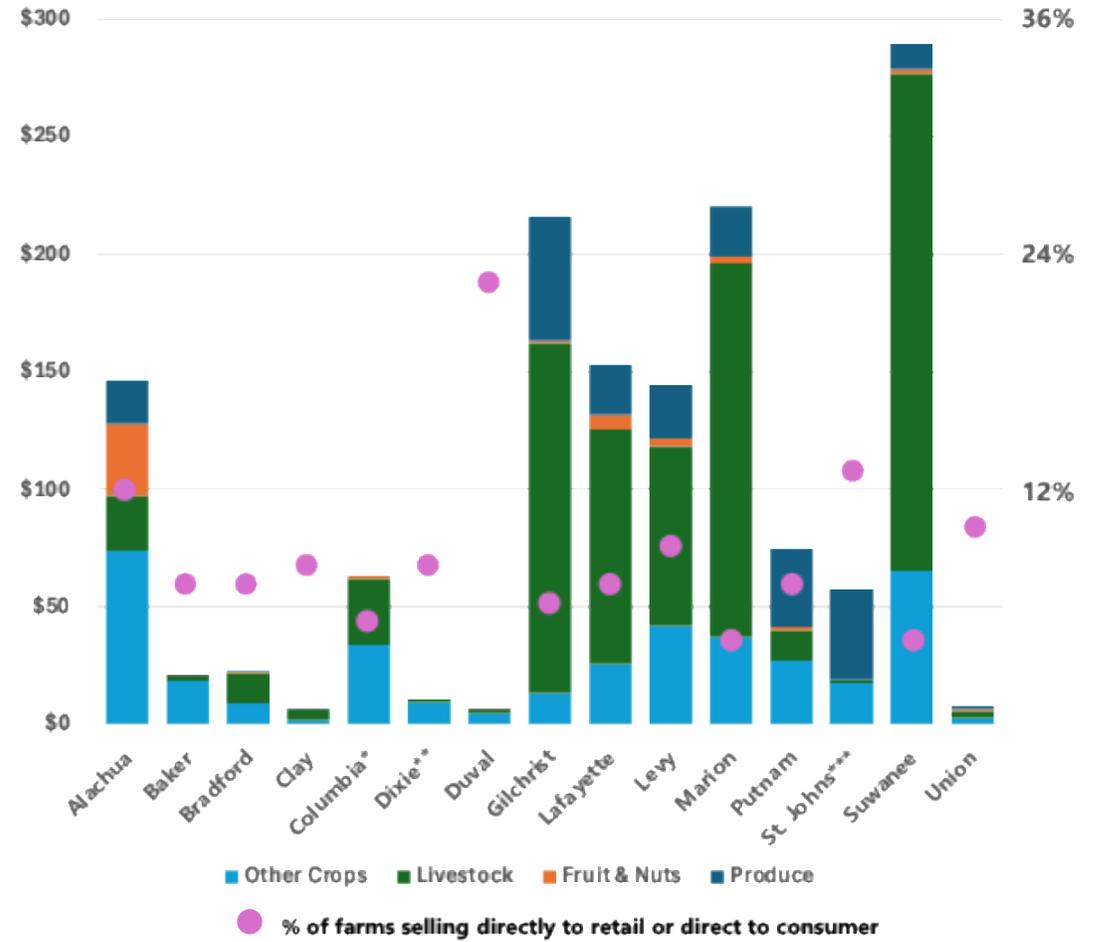
Source: U.S. Department of Agriculture, 2022 Agriculture Census

FARM SALES

- Average farm revenues vary greatly across the region with 55% coming from livestock, 15% from produce, 4% from fruits and nuts, and 26% from commodity crops.
- Produce, as a proportion of total sales, similarly varies by county, ranging between less than 1% to 44% of all farm products sold.
- Crops (including commodities) encompass 84% of Alachua’s agricultural output
- Alachua (34%) and Union (31%) have the highest proportion of produce & fruit sales.
- Combined Retail and direct to consumer farm sales are 12% in Alachua Co, second in the region behind Duval Co (23%).



Total farm sales by county (in millions) and percent of farms selling in retail channels

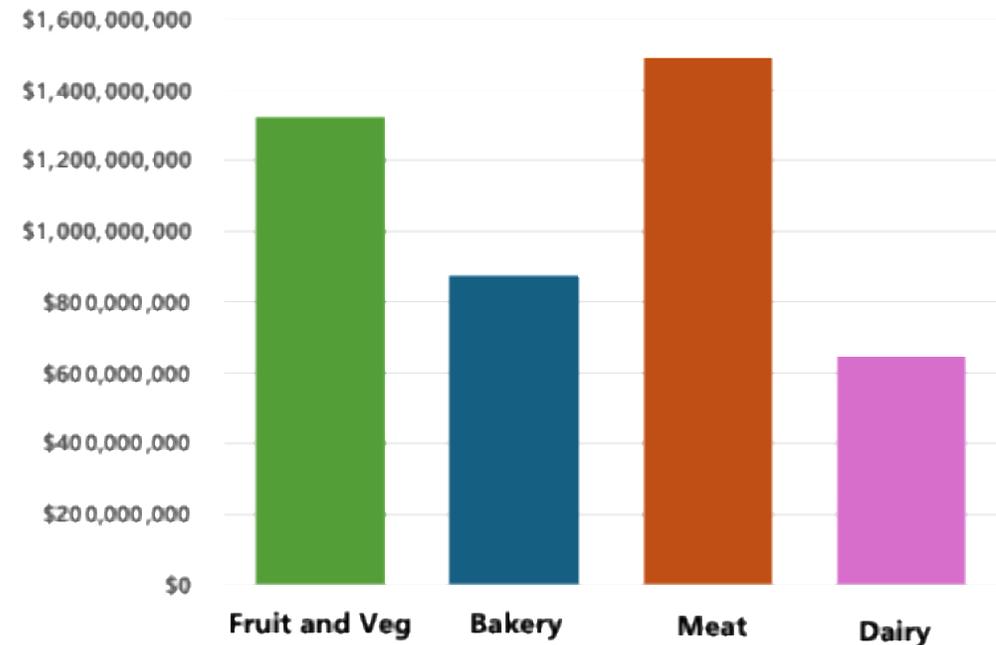


Source: U.S. Department of Agriculture, 2022 Agriculture Census
 *Columbia Co - Produce value not shown
 **Dixie Co – Produce or Fruit value not shown
 ***St. Johns Co – Fruit value not shown

CONSUMER FOOD PURCHASING

- Although nationally, 'Food Away From Home' sales eclipsed Fresh Food sales in 2010 and accounts for over 60% of per-capita total food spend, the data is virtually flipped within the food shed study region.
- Fresh food or grocery spend regionally was \$6.9 billion in 2024 with Food Away From Home spend at \$3.69 billion.
- Alachua has the 5th highest total grocery and food spend in the study region, or approx. 10% of regional spend.
- Fruit & vegetables account for 19.3% of total grocery spend or approx. \$1.3 billion in sales.
- In Alachua Co, total food sales reached \$1.2 billion with \$745 million in Grocery spend and \$408 million in Food Away From Home spend (\$6,122 & \$3,353 per capita, respectively)
- Fruit and produce Alachua Co account for \$145 million in total food sales.

Total regional consumer grocery spending, 2024



Source: Census Business Builder, Census.gov

Overview

With the support of the Advisory Committee, the project team compiled a long list of 140 people and companies across all stakeholder groups as potential interview & focus group subjects. Guides were developed to support a cohesive approach independent of the interview subject.

From May through August 2025, **42 interviews with 45 subjects** were conducted, providing additional background, new contacts, and a wealth of strategic insights for the project.

In addition, **three focus groups** focused on small farmers, food makers, and community organizations were held in August, 2025.

Most interviews were also recorded to ease analysis of key words, phrases, and themes.

By the Numbers:

- 140** Subjects contacted
- 45** Interviewees
- 23** Hours of interviews
- 3** Focus groups
- 20** Focus group participants

INTERVIEW + FOCUS GROUP SUMMARY

KEY TAKEAWAYS

Across both interviews and focus groups and between stakeholder groups there were multiple recurring themes:

- Farmer challenges entering traditional wholesale networks
- Cold chain and storage infrastructure needs for growers
- Growers see benefits to developing additional business lines such as aggregation or value-added production
- Opportunities to harvest surplus farm products to support food access initiatives
- Consideration for facilities that may support produce as well as animal agriculture processing.
- Pricing constraints for institutional and food business buyers
- A buyer need for consistent supply of specific types of product
- Support from growers and buyer groups for an aggregation distribution network, preferably with an online purchasing component.
- Limited fresh food access for populations in the East Gainesville
- A demand for entrepreneurship training, workforce development, and mentorship programs that can help small businesses with marketing, finances, & growth strategy.
- The pending closure of Working Food's shared kitchen highlights the need for additional incubator kitchen infrastructure supporting emerging foodservice & CPG businesses
- Funding and capacity constraints for food access organizations

Overview

A survey was developed to capture insights and feedback from six stakeholder groups: Farmers, Food Buyers, Food Makers, Food Access organizations, government and policy stakeholders, and end consumers.

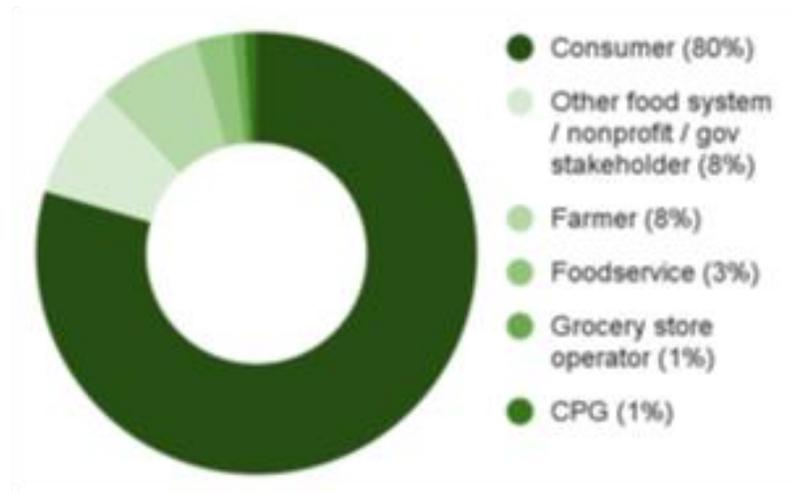
The survey was opened for 5 weeks from July 9 – Aug 8, 2025, and was offered in both English and Spanish.

Distribution was facilitated by direct outreach and utilization of multiple listservs, support from the advisory group, the Food System Coalition, UF IFAS, and the Gainesville Chamber of Commerce, among others.

By the Numbers:

378	Respondents
73	Questions
77%	Completion Rate
11 min	Avg time to complete

Role in the food system:



SURVEY SUMMARY

KEY TAKEAWAYS

- Although 80% of survey respondents identified as end consumers, food businesses and food system advocates accounted for 75 of the total response pool meeting the response goal.
- **Almost 20% of respondents shared that they face food insecurity** aligning with the poverty rate of the county.
- Despite the satisfaction with the existing of farmers markets, many **respondents voiced interest in having more local food in existing or new retail grocery stores.**
- Community partners are quite interested in having a **more effective food distribution center**, a place to donate food, process waste, host workshops, and process food into value added products.
- Multiple buyers cited the **pricing challenges for purchasing local food** noting that local food would need to be priced competitively to meet budget requirements.
- Limits to **product volume and distribution pathways for small growers are key challenges** for farmers.
- **Food businesses are interested in having access to a versatile commercial kitchen** that includes a variety of manufacturing and food production equipment to support canning, batch cooking, baking, and light processing of fruits and vegetables.

- Many organizations are working to improve Alachua County's food economy and access, yet some are operating in silos
- Despite average food insecurity, a 20% poverty rate shows ongoing need for better healthy food access.
- Many areas lack nearby grocery stores with fresh produce.
- The county's produce market earns \$49 million yearly, with \$145 million spent on fresh and frozen produce in 2023.
- Surveys show support for a food hub to connect farmers, buyers, and consumers.
- Interviews highlighted the need for training and business support to help food businesses grow.
- Some farms are interested in participating in a food hub pilot or partnering in the long-term.
- A multi-purpose food hub could boost farmers' incomes and increase consumer access to local produce.

The strongest support for potential components of a Food Hub included:

- **Aggregation & distribution** services to support small farmers
- Business development and **training programming**
- **Retail sales opportunities** for businesses and for consumer access
- Food processing, manufacturing & **commercial kitchen infrastructure** given existing capacity constraints in the region

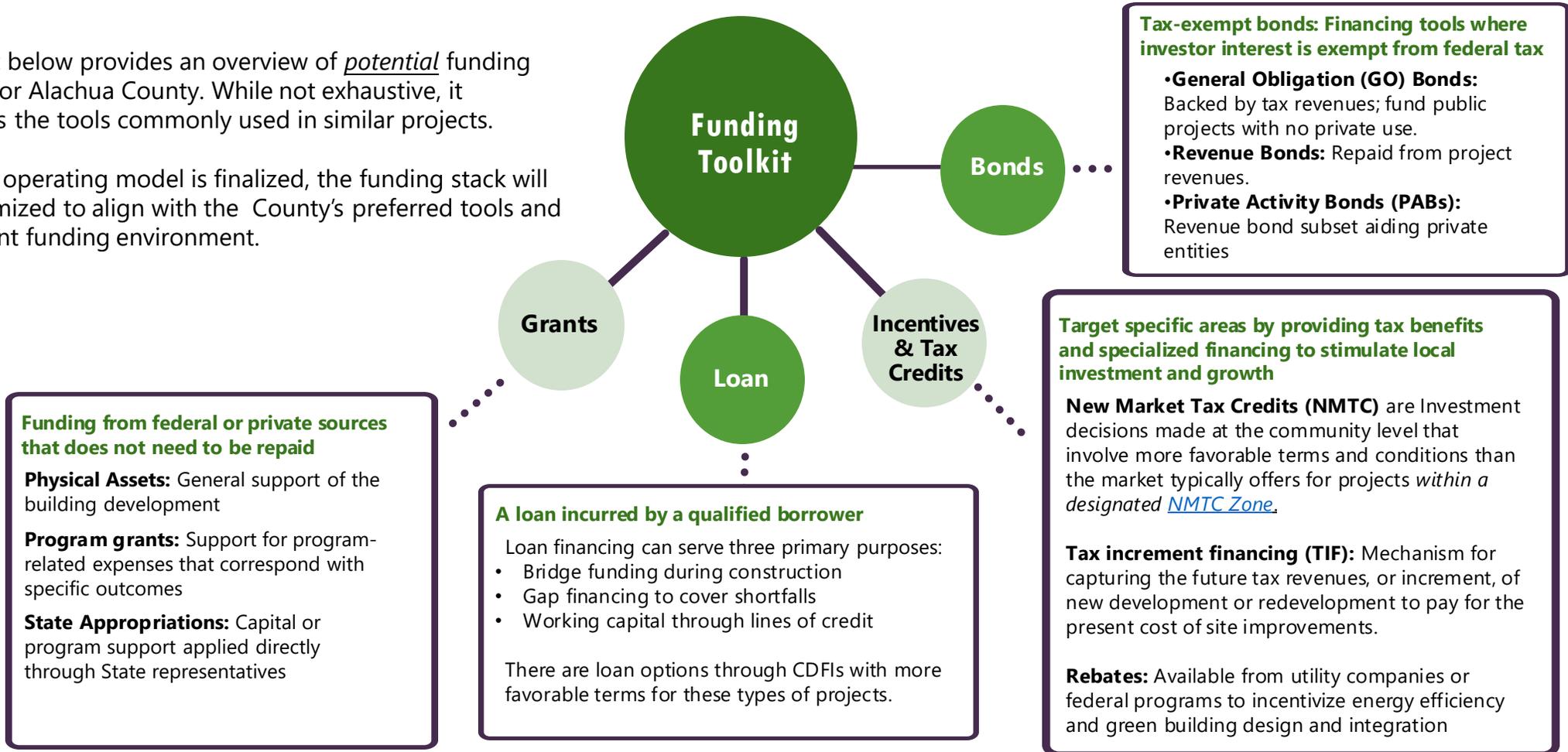
Moderate support was registered to support **supply chain** infrastructure, **gleaning** and food waste programs, as well as **food as medicine** initiatives

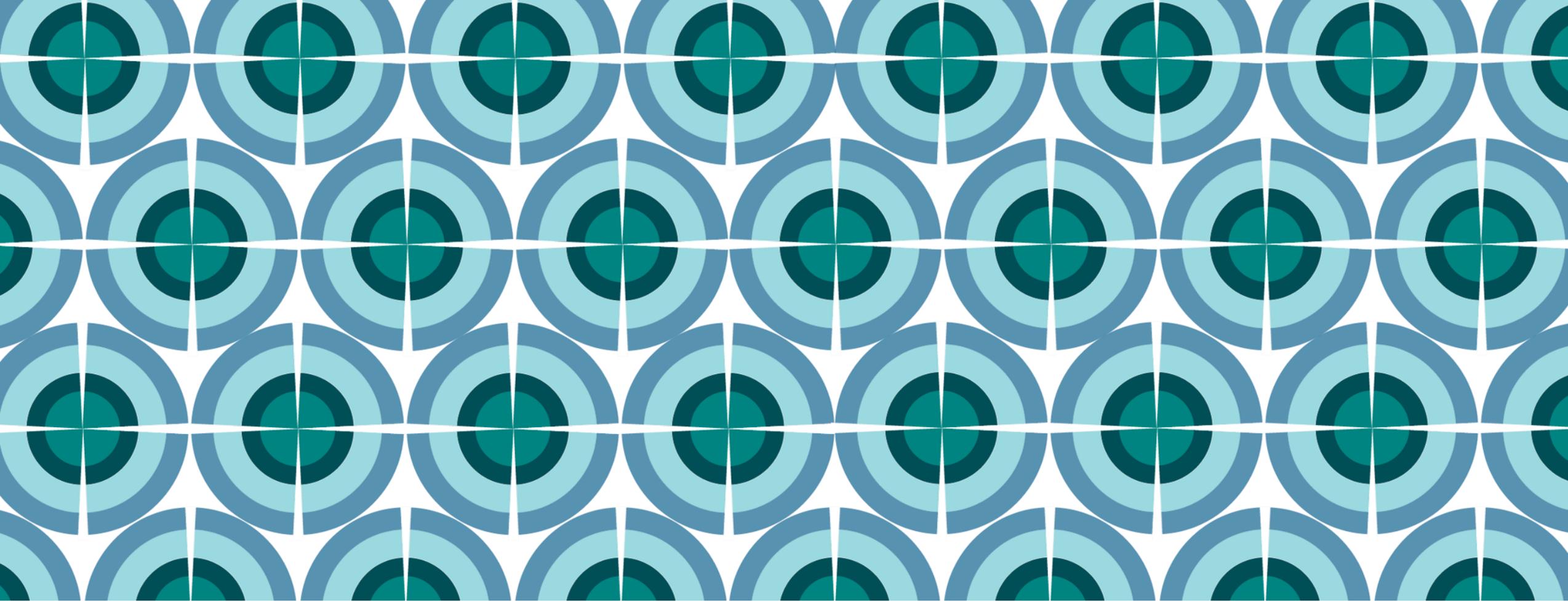
MARKET ANALYSIS SUMMARY CONCLUSIONS

POTENTIAL FUNDING TOOLS

The chart below provides an overview of *potential* funding vehicles for Alachua County. While not exhaustive, it highlights the tools commonly used in similar projects.

Once the operating model is finalized, the funding stack will be customized to align with the County's preferred tools and the current funding environment.





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