

Program Manager Services for

Alachua County's Fresh Food Pathways Program

RFP 24-465-LC

Market Research Report

Prepared by:

Good Food Partners / New Venture Advisors

September 2025



The following market research report is deliverable 1.4, summarizing the 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 one hundred 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 fifteen community advisors, Grace Grows recently conducted the Southeast Gainesville Community Food Project, which informs how the community desires food access and sovereignty initiatives to be conducted. The nonprofit 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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EXECUTIVE SUMMARY

PROJECT BACKGROUND

In January 2024, the County of Alachua released an RFP seeking a qualified consultant to conduct a feasibility study as a part of the Fresh Food Pathways Program that assesses the potential development of a local food hub. With a county population of 284,000 and a regional population of 2.5 million, the program has identified that few opportunities exist to make locally grown food accessible to residents of Alachua County. Over the past twenty years, multiple organizations have contributed to the research highlighting local food system gaps, including

- continued barriers to access local food and fresh produce, specifically, in and around Alachua County, with an emphasis on east Gainesville
- lack of market resources for small farmers to sell and grow locally
- supply chain resilience concerns in the wake of the COVID-19 pandemic

The Fresh Food Pathways project is based on these previous efforts to map and respond to emergency food needs, an institutional commitment to the Good Food Purchasing Program standards, and the [County Commission's FY 2022 Strategic Guide](#).

PROJECT VISION AND PURPOSE

The Fresh Food Pathways Program will provide a pathway for Alachua County to have a holistic strategy for enhancing the local food economy while supporting improved health outcomes for its residents. As stated in the "Program Manager Services for Alachua County's Fresh Food Pathways Program RFP," the project's purpose is the execution of an engagement strategy, market analysis, and business plan for a food aggregation and distribution program that will primarily sell to institutional food purchasers while serving economically challenged and marginalized communities in the county by providing affordable access to healthy local foods.

To best perform this work, New Venture Advisors (NVA) is partnering with Grace Grows, a local community nonprofit, forming a project team also referred to as the Good Food Partners. The full project, expected to last forty months will do the following:

- Engage the community to assess the root causes of local and regional food systems inequities and market inefficiencies
- Facilitate pilot projects to test the market for key activities of a food hub
- Create a business and operating model for a food hub that may offer aggregation and distribution services for local, nutritious, and sustainably sourced food
- Develop a plan that supports the economic vitality of local and regional farmers, ranchers, and food producers
- Enhance the ability for communities, institutions, retailers, and foodservice operators in Alachua County to access locally produced food
- Create pathways to provide affordable access to healthy local foods for communities across Alachua County

PROJECT APPROACH

The Good Food Partners team has developed a multi-stage process that includes initiation, market analysis, operating model, pilot projects, design, financial modeling, and a final feasibility assessment. This report covers the initial phase of the project, which includes initiation and market analysis.

TABLE 1: PROJECT TIMELINE AND DETAILS

PROJECT PHASE AND DETAIL	TIMELINE
<p>Phase 1: Initiation + Market Analysis</p> <p><i>Initiation</i> Project kickoff with study team</p> <ul style="list-style-type: none"> • kickoff with project team and advisory members • create and maintain project plan and timeline • design and develop research tools and stakeholder outreach plan <p><i>Market Analysis: Pt 1</i> Activate initial market analysis tools (engage advisory for outreach support and participation), including</p> <ul style="list-style-type: none"> • literature review of relevant studies, research, news, and initiatives • preliminary interviews to gain a deeper understanding of the regional food system landscape • secondary research to better understand demographics and regional economics related to agriculture, food production, consumption, and access <p><i>Market Analysis: Pt 2</i> Activate market analysis tools (engage advisory for outreach support and participation), including</p> <ul style="list-style-type: none"> • conduct interviews • facilitate focus groups • conduct surveys • NVA on site for facilities tours and site visits • compile synthesis and analysis of findings into a comprehensive report 	<p>December 2024 – September 2025</p>
<p>Phase 2: Operating Model + Pilot Projects</p> <ul style="list-style-type: none"> • Propose a range of operating models with case studies and examples • Conduct community concept workshops with all audiences • Based on input, recommend pilot projects to demonstrate functions of a food hub • Finalize pilot project plan • Implement pilot projects, including launching applications, interviews • Evaluate pilot projects 	<p>October 2025 – August 2026</p>
<p>Phase 3: Food Hub Design</p> <p>Compile findings from pilot projects and update operating model recommendations based on results</p> <p>Finalize concept model, design, and financial modeling, including</p> <ul style="list-style-type: none"> • define facility specs and complete facility design • financial analysis • host design charette to gather input • finalize design, operating model, and financial analysis • funding and development plan • present final model with project team and make go/no-go decision 	<p>September – August 2027</p>
<p>Phase 4: Business Plan and Final Report</p>	

<ul style="list-style-type: none"> • Create a model business plan for County to support evaluating potential operators • Draft plan and develop RFQ / RFP for operator search • Draft development plan with major milestones over five years • Draft final feasibility report • Share report with project team and present to Board of County Commissioners 	September 2027 – March 2028
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GOOD FOOD PARTNERS PROJECT TEAM AND ADVISORY COMMITTEE

Good Food Partners is a core project team consisting of New Venture Advisors, Grace Grows, and representatives from Alachua County Department of Tourism and Economic Development. Together, this group led and supported the initial market analysis.

TABLE 2: PROJECT TEAM

TEAM MEMBER	TITLE	ORGANIZATION	ROLE
Sean McLendon	Economic development manager	Alachua County	Project lead
Bailey McLellan	Program associate	Alachua County	Project representative
Abigail Perret-Gentil	Executive director	Grace Grows	Community engagement lead
Andrea Carbine	Director, Food Enterprise Planning	New Venture Advisors	Project lead
Avishai Mallinger	Project manager	New Venture Advisors	Project manager
Michelle DiMuzio	Project manager	New Venture Advisors	NVA project lead
Maura Rapkin	Research specialist	New Venture Advisors	Interviews
Dan Lasky	Research specialist	New Venture Advisors	Secondary research
Hannah Martin	Research specialist	New Venture Advisors	Survey
Maya Atlas	Research analyst	New Venture Advisors	Research analysis, survey
Emmy Nyquist	Research associate	New Venture Advisors	Research analysis, survey

In addition to the Good Food Partners primary project team, the project was supported by an advisory committee of municipal, citizen, organizational, and entrepreneurial representatives. To support the project an advisory committee was established to ensure that the project considered ongoing work across the local food system and that local expertise would provide input, feedback, and guidance throughout the project’s phases. The advisory committee comprises local food-related organizations, including community food system advocates, food producers, farmers, ranchers, purchasers, and health leaders.

TABLE 3: ADVISORY COMMITTEE

NAME	TITLE	ORGANIZATION
Jon Nix	Farm owner, conservation engineer	Black Farmers Association
Patrick Dodds	Executive director	Bread of the Mighty
Latashia Mayze-Brimm	Community engagement director	Bread of the Mighty, Food System Coalition
Pamela Worsham	Homeless education coordinator, farmers market director	Duval Early Learning Academy, Farm to School Alachua
Laureen Husband	VP, Public Policy and Community Engagement	Feeding Northeast Florida

NAME	TITLE	ORGANIZATION
Eddie Shuker	Owner	GP Specialty Produce
Ron Rawls	Pastor	Greater Bethel AME Church
Robin Lewy	Former executive director	Rural Women’s Health Project
Meg Boria-Meyer	Executive director	The Giving Garden
Matthew Mueller	Director, Food and Beverage Services	University of Florida
Paul Monaghan	Associate professor, Department of Agricultural Communication and Education	University of Florida
Shelby Dixon	Executive director	Working Food
Nancy Daren	Community investment specialist	

Monthly meetings were held with the core project team to provide updates on project process and to identify additional resources and issues to consider. Additionally, three meetings with the advisory committee were held during the market analysis phase. This allowed NVA to better understand the regional dynamics related to the project and be given feedback on the research, interview guides, survey development and dissemination, as well as final analysis.

TABLE 4: ADVISORY REVIEW SESSIONS

REVIEW SESSION	AGENDA / FOCUS	DATE
Advisory review #1	<ul style="list-style-type: none"> Project initiation Roles, communication planning, introductions Outline of project with a focus on market analysis phase 	February 10, 2025 February 11, 2025
Advisory review #2	<ul style="list-style-type: none"> Market analysis part 1 review, including presentation of lit review and secondary research and next steps Interview guides and outreach 	May 8, 2025
Advisory review #3	<ul style="list-style-type: none"> Review of full market analysis, including part 2 – surveys and interviews Review pilot project plan Feedback on implications and next steps 	September 18, 2025

MARKET ANALYSIS GOALS AND OVERVIEW

The following report, outlined as Deliverable 1.4. Market Research Report in the Continuing Services Agreement with New Venture Advisors, is a core component to conclude phase 1: market analysis of the project. It includes Deliverables 1.2. Food System Landscape Analysis and 1.3. Community Engagement Plan. A supplementary presentation summarizing the market research report has also been created and is available with the other deliverables via the appendix.

The **goal** of the market analysis is to satisfy the first lever a feasibility, which is to identify community support for, interest in, and need/demand for any potential infrastructure, programs, or resources. This is directly aligned with the Fresh Food Pathways project’s core objectives:

- Clarify gaps in the regional food system and identify which challenges can be addressed via a food hub
- Understand both business and consumer demand for various potential hub activities

- Study the food production methods, product supply, sales capabilities and interest of local growers to expand within the region
- Learn about procurement practices of regional institutions and foodservice providers
- Identify potential collaborators, operators, competitors, and underutilized resources in the region
- Home in on the programming and operational activities most beneficial to stakeholders and consumers
- Tour potential sites and physical assets and identify key infrastructure needs to get a view of costs, resources, and time needed for the execution of a hub

From February through August 2025, the Good Food Partners engaged in the following project actions split into two parts:

Part 1:¹

- A Literature Review assessing and identifying 50 reports, studies, and articles providing background to the existing needs and research related to Alachua County’s local food system.
- Secondary Research to define the socioeconomic landscape, food access requirements, farm business landscape, distribution flows, key foods produced, and the demand for locally produced food.

Part 2

- Interviews and focus groups with over 50 stakeholders from across the regional food and agriculture landscape.
- A comprehensive survey completed with over 300 responses to quantify supply and demand for the proposed project focus – infrastructure, program, service needs and limitations of existing resources.
- An in-person visit to begin the site evaluation process of key assets in the region and if/how they might integrate with a future food hub model.

Together, these activities provide a comprehensive assessment of regional food system needs and help to define the potential implications for phase 2 of the project, which includes operating model and pilot projects. The conclusions of this initial phase will help to guide the development of a viable model and business case that will support the feasibility findings and implementation objectives of this scope and project work.

SUMMARY OF FINDINGS

The first phase of the market analysis highlighted decades of ongoing efforts to support local food systems, a robust nonprofit network, and a comprehensive plan recommending a food hub. Secondary research unpacked Alachua County’s agricultural leadership as it contains the most farms in the region and a large proportion of produce harvested relative to some nearby counties. Meanwhile, with 300 full-service restaurants and regional institutions serving approximately 100,000, there is potential for outsized demand for locally produced products.

In the second phase of market analysis, the research team heard from farmers, ranchers, institutional foodservice providers, food brands, restauranteurs, government leaders, and food systems organizations.

¹ Part 1 of the Market Analysis was completed in May 2025 and a report is included in the appendix

Farmers highlighted the desire to grow their businesses via new channels but also stressed the existing labor issues, gaps in business training (especially with marketing), and challenges entering traditional distribution networks. Foodservice operations and brands affirmed the desire to purchase more local product but noted constraints in terms of logistics, delivery, ordering, and achieving price parity in an economy with increasingly slim profit margins. The food system organizations engaged in the Fresh Food Pathways Program are primarily involved in improving food access or food sovereignty. They stressed the need to ease barriers for marginalized populations to access food and increase the prevalence of fresh and produce in lower income neighborhoods. Additionally, there appears to be interest in facilitating food donations of produce from local farms.

As the full report below will highlight, the first phase of the Fresh Food Pathways Program affirmed the initial level of feasibility and supports the continuation of project work into phase 2. The market analysis findings reflect several important components that often align with food hub developments:

- Population and socioeconomics conducive to supporting a food hub: a robust population of over 280,000 in Alachua County and over 2.6 million people in the region along with a robust agriculture industry and a leading academic institution suggest that there might be a market opportunity to supply, distribute, and purchase food while offering additional food access and business development resources
- Desire for small farmers to grow their business while facing distribution challenges
- Interest from foodservice providers to source more products locally and to align with the Good Food Purchasing Program
- A mission-driven food community closing food access gaps and seeking improved infrastructure to support improved public health and wellbeing across the region
- Overwhelming community support for enhancing local food infrastructure (though some community skepticism over a government-supported food hub was registered)

Furthermore, the market research suggested interest and support for multiple food hub-related activities and programs highlighted below:

Primary:

- Aggregation & distribution services
- Business & workforce training programs
- Expansion of retail sales & consumption opportunities
- Commercial kitchen resources for emerging foodservice & value-added brands.

Secondary:

- Supply chain infrastructure
- Gleaning & food waste mitigation solutions
- Food as medicine initiatives

ALACHUA FRESH FOOD PATHWAYS PROGRAM: MARKET ANALYSIS

RESEARCH HYPOTHESIS

Before beginning the analysis, it was hypothesized that a food hub model focusing on the aggregation and distribution of local food to institutions would best serve the project's goals and satisfy a primary need to increase access of local food while improving the business vitality of small regional food growers and producers. Additionally, it has been suggested that such a platform could also serve residents throughout the county, especially lower income residents who lack access to locally produced food. Given the dual goals of the project, a wide range of potential infrastructure and program components may need to be evaluated. These include upstream solutions to support post-harvest logistics, aggregation, food processing, storage, and distribution as well as downstream solutions to support food access, nutrition assistance, value-added food production, and systems to ease the purchasing of local food either via wholesale or retail channels.

MARKET ANALYSIS METHODOLOGY

As noted earlier, NVA has developed a multi-stage process for market analysis. An initial stage examined the regional landscape to uncover gaps and opportunities for development. This included a comprehensive literature review, preliminary interviews, and secondary research to ensure a clear understanding of the landscape and unique dynamics.

A second phase focused on community engagement supported the diversification of research and data collection methods, ensuring input from a broad range of stakeholders through approaches that respected community limitations and built upon previous research to avoid duplication. This included interviews, focus groups with key stakeholders, a site visit to better understand existing infrastructure and resources, and the dissemination of a survey that captured insights from five different stakeholder groups: farmers, food makers, food buyers (including foodservice and grocers), end consumers, and community organizations.

Grace Grows, NVA's key partner, supported community engagement efforts with strong local connections and established relationships. This was combined with connections from the advisory group and input from the Alachua County project team. The study gathered input from residents and community members, regional farmers and small businesses, community-based organizations, anchor institutions, nonprofits, local food wholesalers, and city government agencies. The advisory team was engaged throughout the market analysis phase to provide feedback on research tools, identify contacts, facilitate introductions, and support wider distribution of the survey to target audiences.

NVA outlined these activities in a Community Engagement Plan² (deliverable 1.3) to guide the use of these research tools.

² See appendix for the full Community Engagement Plan

LITERATURE REVIEW

NVA began the market analysis phase with a comprehensive literature review, gathering documents, research, articles, and case studies of efforts with relevance to the Fresh Food Pathways Program. Thirty-nine documents were reviewed in detail and included in a literature review index that was circulated among the project team and advisory group in March 2025. It provided a wealth of context for understanding ongoing food-system challenges, existing reporting, policy initiatives, points of connection, previous surveys, and other potentially overlapping efforts to develop resources that may intersect with a food hub. Additionally, several food hub examples with a regional emphasis on the southeastern United States were included to provide context for the various ways a facility may manifest.

The fifty materials reviewed were organized into six categories:

- Challenges and needs for the region (9)
- Data resources (11)
- Funding opportunities (2)
- Policy/programming (11)
- Various food system resources and toolkits (5)
- Food hub examples (11)

Key findings:

- Multiple studies and media articles highlight food access and infrastructure **challenges by various stakeholder groups in the region.**
- The **2025 Alachua County Comprehensive Plan for Agriculture and Food Security is a substantive review of local challenges and strategies that include the development of a regional food hub** as a key pillar to strengthen the local food system.
- Multiple **local organizations are collaborating on various food system related endeavors** such as growing food, saving seeds, youth culinary classes, and addressing food insecurity and nutrition insecurity.
- With an estimated public-school food spend of \$9 million, **local funding opportunities and policy aim to enhance local ag economy and boost nutrition quality by supporting local institutional purchasing,** building on work by programs such as the Farm2School partnership, which increased local produce purchasing to over 24 percent.
- **The Alachua County Foodshed Map Webtool includes data from fifteen regional counties** and can help determine relationships between where food is grown, where there is need for food access, and where food is sold/distributed to determine an ideal location for a hub.

- **The University of Florida Institute of Food and Agriculture (UF/IFAS) Extension offers extensive programming, training, and support** within the food system and ag industry, particularly at the small-farm operator/small-business scale.
- Previous surveys by Working Food highlight **demand for value added products but cite lack of resources (particularly time and access) as a barrier**. Most of the interest in incubator/kitchen space is from foodservice and catering operations.
- The Choice Neighborhood **2024 survey highlights demand for bakeries/cafés, grocery stores, and farmers markets**.
- Various successful food hubs from the southeastern United States can be further explored as potential models in Alachua County.

Gaps in literature:

- With exception of the 2022 meat processing facility study, **no previous studies specific to food hubs in the region have been completed**. (i.e., assessing the needs and financial/labor impacts of aggregation, processing, and distribution).
- Previous studies have noted the **lack of adequate transportation** as a barrier to healthy food access. The research team is interested in better understanding the impacts of transit on local food and if there have been any recent improvements to existing infrastructure.
- Select data from the **foodshed mapping tool may be out of date**.
- There is still a need to better understand the **purchasing power and demand for local food from grocery retail and foodservice**.

The findings from the literature review provided a strong framework for the research activities that followed in this phase of work. It identified substantial county support for ensuring the continued viability, sustainability, and equity of the food system in Alachua County by promoting locally produced and distributed goods.

SECONDARY RESEARCH AND LANDSCAPE ANALYSIS

The Fresh Food Pathways RFP defines the regional food-system as being within a 100-mile radius of the City of Gainesville. However, given existing constraints with available data, especially given that data is often available at the state or county level, NVA made a slight adjustment to this radius and aligned its research perimeter to counties that had borders within a 50-mile radius of the City of Gainesville. In some cases, the radius was 100 miles, and in other cases it was less. This research perimeter also aligned with the foodshed mapping tool developed by the County of Alachua in partnership with the University of Florida, a key data set analyzed in the market analysis.

In addition to Alachua, the secondary research explored demographic, socio-economic, food production, food consumption, and food access data from the following counties: Baker, Bradford, Clay, Columbia, Dixie, Duval,

Gilchrist, Lafayette, Levy, Marion, Putnam, St. Johns, Suwannee, and Union Counties. This expanded the market population from the county level of 284,030 (2023) to over 2.6 million people, or approximately 11 percent of Florida’s total population.³

Within these counties are a range of median incomes, poverty rates, unemployment rates, and food insecurity rates highlighting the diverse landscape of the region, which includes urban, suburban, and rural communities. Overall, the region has a 14 percent poverty rate along with an additional 33 percent of people below the ALICE (asset limited, income constrained, employed) threshold.⁴ The ALICE classification suggests these people may lack the funds to regularly afford necessities, often making difficult decisions about purchasing items such as food.

When looking specifically at food insecurity, the counties facing the highest rates included Bradford, Columbia, Dixie, Lafayette, Levy, Putnam, and Suwannee. Except for Putnam, these counties are located mostly to the west of Alachua, further from the urban areas of Ocala, Gainesville, or Jacksonville. Accordingly, these seven counties generally show above average unemployment rates and below average median income.

TABLE 5: DEMOGRAPHICS OF ALACHUA COUNTY AND THE SURROUNDING REGION

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	12.6%	2.9%	13.2%

FOOD ACCESS

³ United States Census Bureau, 2025, <https://data.census.gov/>.

⁴ United For ALICE, 2025, www.unitedforalice.org/key-findings/florida.

While those facing food insecurity are not necessarily faced with a lack of access or supply of fresh food, food insecurity and lack of access often go together. Furthermore, access to healthy food options is essential to healthy eating habits, which are, in turn, critical for good health. Three factors determine food access:

1. A consumer's ability to physically get to places where healthy foods are available for purchase
2. The affordability of healthy food options within a regional designation
3. The availability of assistance to ensure consumers have the means to purchase healthy food

In visualizing food access specifically within Alachua County, NVA mapped grocery stores and measured both walk time as well as drive time (Figure 1). While most residents are within a ten-minute drive of one or more grocery stores, few residents without access to a car can easily walk to a grocery store. This is compounded by the lackluster public transit system that runs on a shortened schedule on the weekends.

According to the USDA, Gainesville, Florida has ten census tracts that lie within a "food desert," defined as a low-income census tract with over 20 percent poverty rates and over 33 percent of the population is more than half of a mile from a grocery store.⁵ While food deserts are recognized on both the east and west sides of Gainesville, they appear less correlated directly to income as they are more closely correlated with racial disparities. All but two of the tracts have a higher share of non-White households, while some tracts with higher poverty levels are not labeled as "food deserts" (Figure 2).

Considering the hypothesized regional food access challenges, NVA produced a visualization to map organizations supporting food access and security throughout northeast Florida (Figure 3). These included food banks, food pantries, after school meal sites, and senior care meal sites.⁶ Concentrated in the urban centers of Ocala, Gainesville, and Jacksonville, many sites and resources exist. The research affirms the wealth of nonprofit organizations such as Bread of the Mighty and Feeding Northeast Florida in facilitating a strong network. However, it also highlights the demand for such outreach. The lack of market-ready food access necessitates an abundance of food access initiatives.

NVA only registered one food hub or aggregation site within the study area: the Fresh Florida Meat Company in Summerfield, south of Ocala. They partner with a small number of ranchers and fisheries to distribute local beef, poultry, pork, fish, and shellfish. (Traders Hill Farm, a hydroponic farm with a growing aggregation and distribution arm is located just outside the study region but will be referenced further later in the report.)

⁵ Alana Rhone, "Food Access Research Atlas," United States Department of Agriculture, 2025, <https://www.ers.usda.gov/data-products/food-access-research-atlas>.

⁶ Erik Finlay and Jess Hays, "Alachua County Foodshed Mapping," University of Florida, 2023, <https://www.geoplan.ufl.edu/portfolio/foodshed/>.

PROXIMITY TO FOOD ACCESS 10-MINUTE WALK AND DRIVE ZONES TO GROCERY AND MARKETS

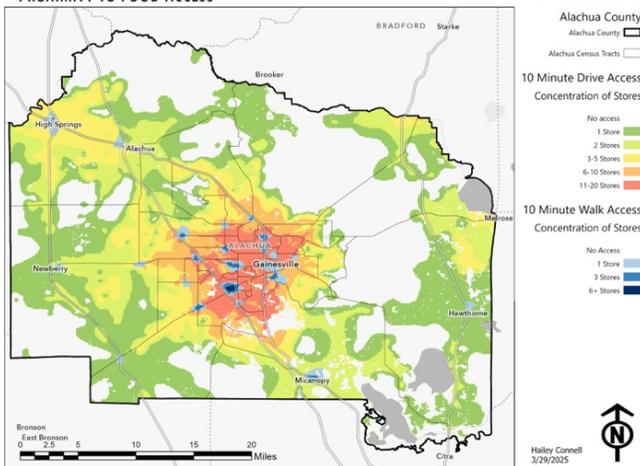


FIGURE 1: HEAT MAP OF ACCESS TO FULL-SERVICE RETAIL GROCERY STORES IN ALACHUA CO

TRACT LEVEL INCOME AND DEMOGRAPHICS SOCIOECONOMIC CONDITIONS AND FOOD DESERT OVERLAP

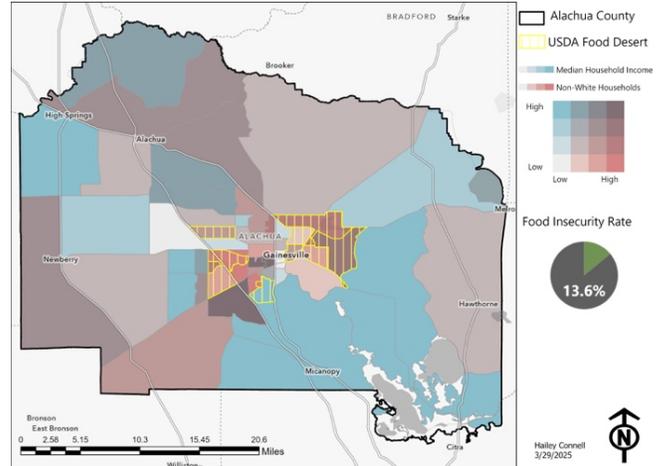


FIGURE 2: INCOME, BACKGROUND, AND PRESENCE OF FOOD DESERTS IN ALACHUA CO

FOOD SYSTEM ORGANIZATIONS REGIONAL DISTRIBUTION OF FOOD ACCESS ORGANIZATIONS AND INFRASTRUCTURE

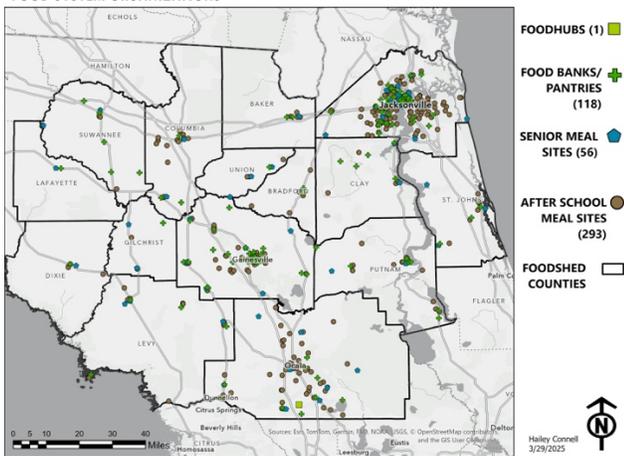


FIGURE 3: FOOD SYSTEM AND FOOD ACCESS LOCATIONS IN NORTHEAST FLORIDA

AGRICULTURAL LANDSCAPE

Across the fifteen counties are 11,503 farms covering over 1.5 million acres for an average farm size of 130 acres.⁷ While there is noted agricultural land along the east shore of the St. John’s River, most of the agricultural land in the region lies along the west of Alachua County. In line with national trends, total farms and total acreage has fallen across most of the study area over the five years from 2017 to 2022. However, Alachua is one of two counties in the region to increase both the number of farms and total acreage, due to growth of mid-size

⁷ United States Department of Agriculture, “Census of Agriculture: 2022 State and County Profiles–Florida,” 2022, https://www.nass.usda.gov/Publications/AgCensus/2022/Online_Resources/County_Profiles/Florida/index.php.

farms. Alachua County includes the second most farms and fourth most acreage for agriculture production in the region.

FARMLAND USAGE AND SALES

The study region has a rich agricultural landscape with a variety of farms in terms of both size and focus areas. While the Florida landscape is conducive to growing a range of produce, fruit, and nuts, much of the land is utilized for commodity crops or livestock. The share of farms producing non-commodity crops ranges from approximately 10 percent in places such as Union and Suwanee Counties to 23 percent in Duval County. By acreage, top crops in the region include forage (hay/haylage), peanuts, vegetables, corn, and watermelons. Top livestock include broilers, cattle, and hens.

Average farm revenues vary greatly across the region, with 55 percent coming from livestock, 15 percent from produce, 4 percent from fruits and nuts, and 26 percent from commodity crops.

Produce, as a proportion of total sales, similarly varies by county, ranging from less than 1 percent to 44 percent of all farm products sold. While there is a larger proportion of fruit-producing farms over produce, the total crop value of those fruit and nut harvests (\$50.6 million) pale in comparison to the produce harvests (\$233.1 million).

Alachua County is a bit of an outlier within the region. Crops (including commodities) make up 84 percent of the county's agricultural output, 40 percent of which is produce, fruit, and nut sales. Overall, total specialty crop sales are 34 percent of the county's agricultural output. Additionally, it is one of the only counties in the region where fruit and nut harvest value (\$30.7 million) is more than produce crop value (\$18.3 million), a 67 percent increase.⁸

FOOD DISTRIBUTION

Most larger farms in northeast Florida leverage traditional wholesale distribution relationships, especially as they offload the 29 percent, or \$381 million, in regional commodities. The livestock industry is twice as large and often requires out-of-state processing as there is no meat processing facility within proximity of Alachua County. While eleven distribution centers in the region were identified, only three are in Alachua County. However, even though both distributors carry fresh produce, their focus includes an array of value added and processed foods for wholesale.

In terms of local access, NVA looked at both retail and direct-to-consumer (D2C) purchase patterns. Only Duval County shows over 20 percent of farm sales revenues from D2C (16%) or retail sales (7%). This is likely given the presence of Jacksonville's large population and its three farmers markets. Regionally, ten farmers markets exist

⁸ Ibid.

within the northeast Florida study region and half of those (five) are in the Gainesville metro area, according to the Florida Farmers Market Association.

In Alachua County, direct-to-consumer and retail farm sales account for approximately 12 percent of total farm sales, above the median percentage for direct-to-consumer and in line with the median for regional retail sales. This highlights an opportunity for growers in Alachua County to increase local sales, especially given the above average percentage of retail-ready crops such as produce, fruit, and nuts.⁹

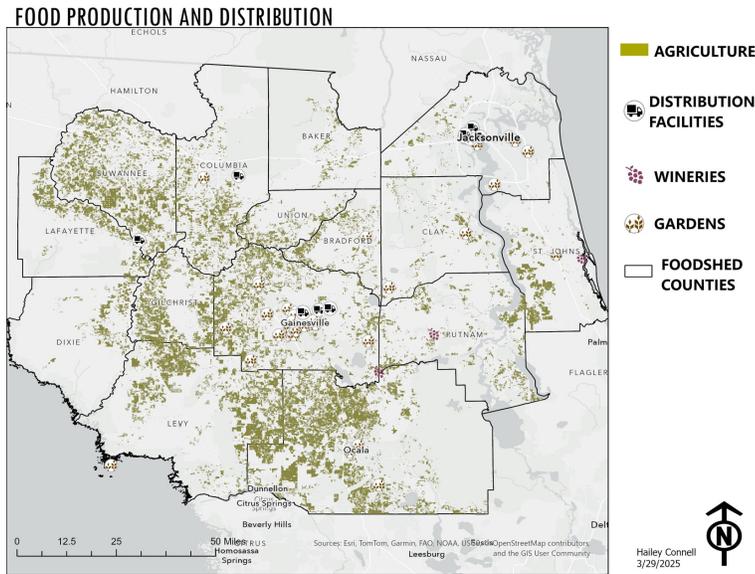


FIGURE 4: AGRICULTURE LAND USAGE & DISTRIBUTION FACILITIES IN NORTHEAST FLORIDA

TABLE 6: REGIONAL CHANGE IN FARMS AND FARM SIZE FROM 2017 TO 2023

COUNTY	FARMS	% CHANGE SINCE 2017	TOTAL FARM ACREAGE	% CHANGE SINCE 2017	AVG FARM ACREAGE
Alachua	1,712	6%	197,906	11%	116
Baker	330	1%	19,005	-43%	58
Bradford	418	-15%	61,282	4%	147
Clay	326	-10%	37,483	N/A	115
Columbia	867	-11%	89,621	-16%	103
Dixie	154	-34%	51,720	-8%	336
Duval	314	-14%	20,593	-31%	66
Gilchrist	549	-3%	106,752	30%	194
Lafayette	250	-3%	105,429	13%	422

⁹ United States Department of Agriculture, "Census of Agriculture," 2022, <https://www.nass.usda.gov/AgCensus/>.

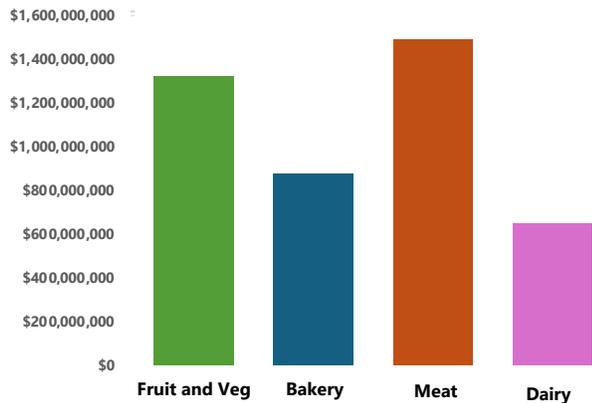
COUNTY	FARMS	% CHANGE SINCE 2017	TOTAL FARM ACREAGE	% CHANGE SINCE 2017	AVG FARM ACREAGE
Levy	993	-6%	198,497	6%	200
Marion	3,329	-16%	290,691	-12%	87
Putnam	539	-4%	134,803	59%	250
St. Johns	223	-12%	23,749	-31%	106
Suwanee	1,170	8%	184,350	9%	158
Union	329	7%	37,467	-30%	114
Florida	44,703	-6%	9,701,400	N/A	217

FOODSERVICE, CONSUMER FOOD PRODUCTION, & PROCESSING

In 2024, consumers in the fifteen counties that encompass the Alachua County food shed spent \$10.5 billion on food, according to U.S. Census data. This includes both retail grocery consumption as well as food away from home (restaurants/foodservice/prepared food).¹⁰ In recent years, with shifts in consumer behavior by younger generations, total spend on food away from home has eclipsed total grocery spend. However, in the region (and within Alachua County) grocery spend is 66 percent, significantly higher than food away from home (35%).¹¹

Within the grocery category, fruit and produce (fresh and prepared) sales account for nearly 20 percent of total receipts, or \$1.32 billion. Within Alachua County, consumers spent \$145 million on fruit and produce in 2024, or an average of \$1,194 per household per year.

Total Regional Consumer Grocery Spending, 2024



Source: Census Business Builder, Census.gov

FIGURE 5: REGIONAL CONSUMER SPENDING ON FOOD AWAY FROM HOME IN 2024

¹⁰ It is worth noting that food-away-from-home metrics include price paid for products, not just food cost.

¹¹ Census Business Builder, <https://cbb.census.gov/>.

Restaurant and foodservice food cost data is difficult to source in aggregate. However, with a conservative estimate of 25 percent food cost as a proportion of sales, foodservice entities in Alachua County likely spent over \$100 million on food and over \$900 million regionally.

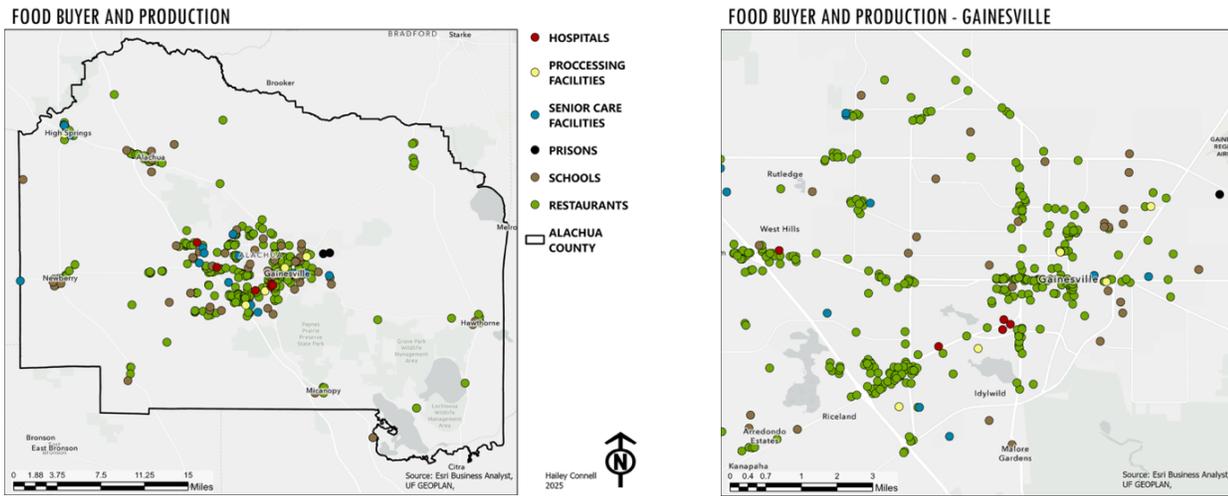


FIGURE 6: INSTITUTIONAL FOODSERVICE AND FULL-SERVICE RESTAURANT PRODUCTION LOCATIONS IN ALACHUA CO

Within Alachua County, there are a robust number of entities involved in the processing and production of food. They include

- **300+** full-service restaurants
- **49** primary and secondary schools, serving over 28,500 students
- **2** colleges serving 67,500 students
- **8** hospitals with approximately 2,400 beds
- **18** senior living communities with approximately 900 units
- **2** detention centers with capacity for 1,200 residents
- **5** shared kitchens and food processing facilities¹²

Although many educational and correctional facilities have tight and pre-determined budgets, the diversity of foodservice outlets and institutions may provide an opportunity for increased local purchasing. Independent full-service restaurants also present an opportunity to purchase locally as they are less likely to have strict purchasing contracts or requirements.

Beyond direct foodservice, five food processing facilities in the region were identified. These include flexible kitchen spaces for ready-to-eat foodservice operators, meal prep companies, as well as value-added and CPG

¹² Erik Finlay and Jess Hays, “Alachua County Foodshed Mapping,” University of Florida, 2023, <https://www.geoplan.ufl.edu/portfolio/foodshed/>.

(consumer packaged goods) production. Most notable is the shared kitchen operated by Working Food, which includes a 600-square-foot shared kitchen and approximately 400 square feet of storage (dry and cold). While there are several value-added consumer product companies producing goods out of that space, most members have foodservice concepts such as food trucks, catering, and meal prep companies. Yet, given fluctuations in operations, challenges to access, and other reasons to be further studied, only approximately 10 percent of food processed in the facility is grown locally.

PRIMARY RESEARCH

PRIMARY RESEARCH OVERVIEW

NVA utilizes multiple tools to build a comprehensive understanding of the regional landscape. Primary research was conducted through interviews, focus groups, and a survey for targeted stakeholder groups. Key research questions were designed to validate potential components of a food hub in Alachua County as well as validate interest in, demand for, and local need for potential programs, services, and resources the hub could offer or support. NVA shared its research tools, interview guides, and a draft survey with the advisory committee to review themes, language, approach, and flow of the research methods.

Research focused on several key 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, including
 - **shelf-life extension:** increasing the local food supply through post-harvest food loss prevention
 - **aggregation:** providing infrastructure for the aggregation, cleaning, storage, and eventual distribution of local food products from producers who do not have the scale to participate in other channels
 - **food processing and manufacturing:** resources and/or infrastructure to produce local food into food processing, value-added consumer products, or for ready-to-eat foodservice consumption
 - **distribution:** streamlining or easing distribution systems to ease the procurement of local food to institutional foodservice, food retail (grocery stores), or restaurants
 - **food-as-medicine:** addressing nutrition assistance and health outcomes through partnerships between health care providers, fresh-food retailers, and end consumers
 - **retail consumer access:** increasing consumer access to local foods by creating new retail purchasing opportunities either through new or existing retail operations
 - **business support:** training and technical assistance for producers to scale through new sales and distribution channels for existing and/or value-added products; leveraging marketing tactics to increase community awareness and demand for locally grown, processed, and produced food products
- **Identify resources to support the project** (i.e., funding, locations, existing programming)
- **Identify key partner organizations** and potential spoke partners

INTERVIEWS

INTERVIEW METHODOLOGY

Through secondary research, discussions with the project team, and feedback from the advisory group, Good Food Partners created a list of over 130 potential interview subjects. Three interview guides were developed to support a cohesive approach to discussions and conversations with interviewees.¹³

Six preliminary interviews were held in the spring of 2025, followed by a subsequent full interview process from May through August 2025. Fifty-two total interviews with fifty-five subjects were conducted. While some were conducted in person, most were performed virtually. At times, interview subjects provided supplementary materials or follow-up comments.

PRELIMINARY INTERVIEWS

During the first phase of the literature review and secondary research, Good Food Partners hosted six preliminary interviews. These served as information gathering sessions to better understand dynamics of the local food ecosystem, general challenges, and ongoing and forthcoming initiatives; to identify other local leaders to speak to; and to generate community buy-in for the project. Each interviewee represented a different stakeholder group (farmer/producer, education/research, institutional buyer, community organization, food entrepreneur, government stakeholder), and interviewees were chosen to get the widest range of thoughts and feedback.

TABLE 7: PRELIMINARY INTERVIEW SUBJECTS

STAKEHOLDER GROUP	NAME	TITLE	ORGANIZATION
Community organization	Shelby Dixon	Executive director	Working Food
Education/research	Paul Monaghan	Associate professor	University of Florida
Farmer/producer	Eddie Shuker	Owner	GP Specialty
Food entrepreneur	Aisse Kane and Awa Kaba	Owners	Flavorful Alachua
Government stakeholder	Anna Prizzia	County commissioner	Alachua
Institutional buyer	Matt Mueller	Director of Food and Beverage	University of Florida

PRELIMINARY INTERVIEW ANALYSIS

The interviewees highlighted important issues, and those related to their specific niche, sector, or expertise will be discussed in more detail in the interview analysis section. However, the preliminary conversations highlighted five primary themes and have been incredibly helpful in shaping some of the thinking around the Fresh Food Pathways Program.

¹³ See appendix for interview guides

Community Trust and Cultural Relevance

- Building trust with residents is an important aspect of developing a food hub. Many organizations have seen other food-system initiatives fail to be realized, and some examples of underinvestment in pockets of Alachua County have led to a feeling of distrust among some residents, especially in east Gainesville. To build trust, it will be important for programming to be culturally appropriate, community-led, and delivered in accessible, familiar formats.

Infrastructure and Processing Capacity Gaps

- There are indications that farmers and institutions face logistical and capacity challenges to growth, scale, and the development of new revenue streams. This includes limited cold storage access, co-packing, and processing facilities but also time and labor constraints. A hub with physical and technical resources might help to address some of these needs.

Food Hub as a Multi-Functional, Community-Centered Space

- Some stakeholders have envisioned a flexible, potentially decentralized model, with shared kitchens, education spaces, business support, workforce development, and both business-to-business (B2B) and limited public access components. This may allow for some components to be located closer to their stakeholder base (e.g., an aggregation site near a cluster of farms or a retail storefront where food access remains a challenge).

Strategic Collaboration and Investment

- Long-term success may rely on a diversity of support, such as government, grants, and partnerships across the community, university, and private sector—along with piloting and adapting to local conditions.

East Gainesville as Potential Hub Location

- Many stakeholders have expressed interest in east Gainesville as a potential site for the hub, citing its relevance to addressing food insecurity, health disparities, and historical disinvestment.

TABLE 8: PRELIMINARY INTERVIEW THEMES

STAKEHOLDER	LOCATION & FEATURES	CHALLENGES	OPPORTUNITIES	NEEDS	COLLABORATION & PROGRAMMING
Buyer	<ul style="list-style-type: none"> • Hub that aggregates from smaller growers and producers and supplies multiple institutions 	<ul style="list-style-type: none"> • Inconsistent quality/supply • Corporate restrictions through current food supplier 	<ul style="list-style-type: none"> • 30% local food goal • Demand for common produce • Donation hub and food distribution combination 	<ul style="list-style-type: none"> • Centralized sourcing • Reliable supply • Food safety compliance • Easy procurement • Competitive pricing 	<ul style="list-style-type: none"> • Strong farmer relationships and trust • Regional partnerships with clear communication • Support for farmer readiness and food safety • Training on logistics, pricing, and onboarding
Community organization	<ul style="list-style-type: none"> • East Gainesville due to underinvestment 	<ul style="list-style-type: none"> • Limited post-high school opportunities • Lack of expertise in food hub operations • Seasonal production constraints • Barriers to market access for small farmers 	<ul style="list-style-type: none"> • Farmers/artisans may sell to hub • Youth workforce development • Local food innovation • Community-driven collaboration • Online marketplace expansion 	<ul style="list-style-type: none"> • Dedicated facility • Complement existing work • Experienced kitchen management 	<ul style="list-style-type: none"> • Online farmers market • Workforce development
Education stakeholder	<ul style="list-style-type: none"> • East Gainesville • Must consider community input 	<ul style="list-style-type: none"> • Food desert • Chronic illness (diabetes, hypertension) • Transportation barriers • Unhealthy options • Mistrust of institutions • Cultural diversity 	<ul style="list-style-type: none"> • Food as cultural strength • Community partnerships 	<ul style="list-style-type: none"> • Community liaison • Culturally relevant education • Shared kitchen, pickup spot, food ed space 	<ul style="list-style-type: none"> • Sororities/community for education
Farmer	<ul style="list-style-type: none"> • Proximity to farms in Alachua 	<ul style="list-style-type: none"> • Lack of processing/cold storage • Harvesting tech gaps • School needs pre-cut produce 	<ul style="list-style-type: none"> • Role in Fresh Food Pathways Program • Sales/distribution to end consumers 	<ul style="list-style-type: none"> • Cold storage and processing for small-scale growers • Solutions for extending shelf life 	<ul style="list-style-type: none"> • Partner with growers and IFAS agents • GP Specialty as a broker for distribution
Food entrepreneur	<ul style="list-style-type: none"> • East Gainesville or downtown • Hub could aid local access 	<ul style="list-style-type: none"> • Scaling production • Co-packing challenges 	<ul style="list-style-type: none"> • Interested in wholesale • Sees potential in a business incubator 	<ul style="list-style-type: none"> • More flexible/delocalized markets 	<ul style="list-style-type: none"> • Potential partnerships with local orgs
Government stakeholder	<ul style="list-style-type: none"> • Centralized/decentralized network • Hub-and-spoke model 	<ul style="list-style-type: none"> • Farmer challenges: processing, marketing, compliance, aggregation 	<ul style="list-style-type: none"> • Diversify agriculture • B2B model • Institutional partnerships 	<ul style="list-style-type: none"> • Investment to bridge supply/demand • Pilot programming 	<ul style="list-style-type: none"> • Supports aggregation/crop planning

INTERVIEWS (PART 2)

In the second round of interviews, NVA and Grace Grows met with forty-five people over forty-two meetings. Fifteen were farmers, seven represented institutional foodservice, three were small food businesses, and twenty were from community organizations, nonprofits, universities, and government.

The interview subjects provided a deeper understanding of the dynamics of their sector, while also highlighting multiple business, sales, and procurement challenges that might be addressed through a food hub. Feedback on operational approach was also provided. The analysis below breaks down the interview insights into three core groups: farmers (including fruit, produce, and livestock), buyers (institutional and food makers), and food system organizations (including nonprofits, community organizations, government, and educational organizations).

TABLE 9: INTERVIEW SUBJECTS

ORGANIZATION/ COMPANY	NAME	TITLE	ROLE
Alachua County Conservation Trust	Justice Diamond	Agricultural conservation specialist	Community
Center for Good Food Purchasing	Molly Riordin	Director of Institutional Impact	Community
Edible Plant Project (former)	Joseph Floyd	Owner operator	Community
Florida Farm Workers Association	Ernesto Ruiz	Research coordinator	Community
Gainesville Chamber of Commerce	Eric Godet	President/CEO	Community
Gainesville Immigrant Neighbor Inclusion (RWHP)	Ethan Maia de Needell	Immigrant program manager	Community
Greater Duval Neighborhood Association	Carla Lewis	CEO	Community
Greater Gainesville International Center	Lauren Poe	President/CEO	Community
Jeera House	Nilanjana Caballero	Owner	CPG
Santa Fe College	Sarah Cervone	Associate professor of humanities	Education
University of Florida	Beatrice Fenelon Pierre	UF Family Youth and Community Science professor	Education
University of Florida	Matthew Williams	Director, Office of Sustainability	Education
University of Florida	Catherine Campbell	Assistant professor, Community Food Systems	Education
Alachua County Cattleman's Association	Jason Beutke	Vice president	Farmer
Bambi's Organic Country Farm	Bambi Liss	Owner	Farmer
BB Farm Dreams	Dan Kahn	Farmer	Farmer
Florida Organic Growers	JC Rodriguez	Education and outreach specialist	Farmer

ORGANIZATION/ COMPANY	NAME	TITLE	ROLE
Frog Song Farm	Amy Van Scoik	Owner	Farmer
Fruitful Earth Farms	Ana Puig	Owner	Farmer
Giving Garden	Meghan Boria Meyer	Executive director	Farmer
Nicoya Farm	Aviva Asher and Daniel Robeieto	Owners	Farmer
Oyster Catch	Val Leitner	Owner	Farmer
Rusty Bee Ranch / RCAC	Brent Weisman	Owner	Farmer
Slick Garden	Erinesha Hamilton	Executive director	Farmer
Stoke Barn	Vanessa Ratcliff	Owner	Farmer
Swallowtail Farm	Noah and Melissa Shitama	Owners	Farmer
The Family Garden Farm	Jordan Brown	Owner	Farmer
Trader Hills Farm	Tracy Nazzaro	Owner	Farmer
Satchels Pizza	Satchel Raye	Owner	Foodservice
Underground Kitchen Chef Empowerment	Carl Watts	Executive director	Foodservice
Alachua County Rural Concerns Board	Marie "Micky" McMillan	Vice chair	Government
City of Gainesville	John John	Immigrant Affairs manager	Government
Gainesville Community Reinvestment Agency	Monica "Mo" Deel	GCRA manager	Government
Farm to School Program Alachua County	Chrystal Baker	Farm to School coordinator	Institution
Farmers Market/Alachua County Public Schools	Pam Worsham	Market manager and homeless education coordinator	Institution
Freshpoint	Katelyn Repash	Director of Local Sourcing + Sustainability	Institution
Marion County School District	Ramona Belcher	Food service director	Institution
Trinity Food Service Alachua County Jail	Chris Watt	Vice president, southeast region	Institution
Trinity Food Service Alachua County Jail	Patricia Rodriguez	Procurement manager	Institution
Union County School Food Service	Betsy Whitehead	Director of Food and Nutrition Services	Institution
Bread of the Mighty	Patrick Dodds	Executive director	Nonprofit
Food Is Medicine Program	Gerard Duncan	Pastor	Nonprofit
Rural Women's Health Project	Adriana Menendez	Assistant director	Nonprofit
SNAP Fresh Access Bucks	Katie Delaney	Fresh Access Bucks program coordinator	Nonprofit
Working Food	Mel Desa	Founder	Nonprofit

INTERVIEW ANALYSIS

Farmers

Multiple small to mid-size farmers were interviewed. Collectively, they grow an array of organic produce, aquaculture products, beef, pork, lamb, shellfish on anywhere from two to eighty acres. Some farmers are expanding beyond Alachua County, while others are stepping away from farming altogether. Below are the key insights from those interviews, which fell into five categories: (1) Sales and operations, (2) Supply chain, (3) Aggregation and distribution, (4) Sustainability, and (5) Food access.

Sales and operations

- All growers cited the need to diversify income streams to maintain their businesses.
- Farmers markets are a popular sales outlet occurring most days of the week throughout the region. However, some farmers have noted that farmers markets are becoming less profitable, with declining attendance and sales as inflation has impacted consumer demand from premium products.
- Farmers struggle to find consistent and reliable wholesale outlets, especially during times of excess production. They often partake in the time-consuming process of reaching out to multiple buyers.
- Multiple interviewees stressed the need for farmers markets that are covered or held indoors to mitigate heat and humidity concerns.
- Some farmers have found success in diversifying their sales channels, such as through community-supported agriculture (CSA) programs, agritourism, farmers markets, and direct-to-consumer sales. However, these processes also require additional labor resources to manage.
- There is a perception that "local" and "organic" labels no longer carry the same value for consumers as in the past. Some claim that grocery stores do not sufficiently highlight or incentivize customers to buy local produce.

Supply chain

- Miscommunication can occur between school buyers and farmers as demand for produce fluctuates due to school schedules, and contracts may not consider farmer growing schedules.
- Weather events can disrupt small farm supply chain, limit the predictability of product, and force buyers to have alternative or backup sourcing strategies.
- Access to infrastructure like refrigerated trucks and loading docks is limited, making distribution more difficult and labor-intensive for small and medium-sized producers.
- Ranchers have shared desire for a meat processing facility in the region to reduce the time and distance to process animal protein.

Aggregation and distribution

- Small-scale growers and farmers value access to affordable cold storage and light processing facilities, especially those located closer to their farms. This can help address seasonal dips in produce availability and enable them to serve a wider geographic area.

- Accordingly, many recognize the opportunity for aggregation and distribution services (including online marketplaces) that can connect local growers and producers with institutional and community buyers, reducing the risk and complex logistics for individual farmers.
- Some farmers have noted an interest in exploring partnerships and collaborations, such as with food hubs or distribution centers, that could help streamline the distribution process and provide better access to a wider range of buyers for these local producers.
- It was noted that small farms may also require additional marketing and infrastructure support.
- Aquaculture farmers have also voiced desire for aggregation and processing support, especially as they have noted challenges with USDA funding and support.
- Some interviewees, including Traders Hill Farms, Val Leitner, and Frog Song, see opportunities for efficiencies in distribution and aggregation such as backhauling and food rescue/gleaning.

Sustainability

- As input costs rise and climate change brings more volatility to crop health, margins are shrinking, impacting many small and mid-sized farms and causing some to go out of business entirely.
- Some suggest that some consumers are satisfied with food grown locally regardless of approach, while others are very engaged in the food system and prefer to know the source and production process of their food. Either way, several interviewees highlighted increased demand for local food products, including meat, dairy, produce, culturally relevant produce, and value-added items like jerky and smoked fish dip.

Food access

- Multiple farmers shared how they would like to ensure their product reaches lower income populations, perhaps in the form of a mobile market.
- When asked about supporting food access initiatives, farmers have generally vocalized interest, especially if certain programs can help offload surplus product.

Buyers

Institutional Buyers

Institutional buyers such as schools and hospitals have voiced interest in sourcing more local produce. However, they face ongoing challenges as they often require consistent supply, quality standards, and value-added processing like washing and cutting. The buyers interviewed highlighted three key themes in the discussions: (1) Desire to support local businesses, (2) Managing costs while meeting contractual obligations with vendors, and (3) Supply chain and delivery challenges.

Desire to support local businesses

- Consistency and reliability of product supply are highly valued, with a need for guarantees that the products can be delivered on time.

- Table 10 below lists primary ingredients the buyer group highlighted as desirable for local purchasing:

TABLE 10: FOOD PRODUCTS OF INTEREST

FOOD PRODUCTS OF INTEREST			
Apples	Cilantro	Melon	Shrimp
Basil	Corn	Onions	Squash
Beef	Cucumbers	Oranges/citrus	Strawberries
Broccoli	Green beans	Peppers	Tomato
Cabbage	Kale	Potatoes	Zucchini
Carrots	Lettuce	Root vegetables	

Managing costs and contractual obligations

- Local produce purchases for institutional purposes mostly come from subsidies or allocated funds (UF goals of 30% local purchasing, Alachua schools 10% toward local produce). However, many institutional contracts require purchasing from an approved list of conventional suppliers. Additionally, challenges exist to get smaller farms and businesses on approved procurement lists.
- Some vendors have strict food safety and/or processing reporting requirements, making it difficult for small growers to oblige.
- Universities and schools must balance sourcing local produce with maintaining affordable meal plan prices.

Supply chain and delivery

- Another current challenge is that the potentially restrictive delivery schedules may not align with farm harvest schedules.
- As it pertains to the possibility of a food hub, institutions and schools value having a "one-stop shop" for locally sourced produce and minimally processed items. This would help them streamline their procurement and reduce labor in the kitchen. There is interest in purchasing more locally grown and specialty products, but, again, the institutions highlight the need the items to be conveniently packaged and delivered.

Food Makers

The food makers interviewed included CPG (consumer packaged goods) whose products produced and sold include vinaigrettes, seasonings, dry spices, and juices. Sales channels for these businesses include farmers markets and pop-up markets, as well as to health food stores and grocery stores. Smaller foodservice operators

(restaurant/caterers) provided feedback on their interest in local food. NVA also spoke with Working Food, one of the more prominent shared kitchens for emerging food businesses, about their model.

Procurement

- Most small food businesses highlighted the value of fresh, high-quality ingredients, particularly produce like vegetables, herbs, and spices.
- Businesses note availability, price, and matching specific product needs as challenges to sourcing all their ingredients locally. There was also an emphasis on the importance of maintaining strong relationships with their local suppliers to ensure a consistent and reliable supply of ingredients.

Production and processing

- Most producers interviewed lease space from Working Food and do all the production themselves.
- Some noted the desire to overcome financial constraints and eventually partner with a co-packer/co-manufacturer to scale production.
- There is a continued need for accessible food safe storage.

Sales and marketing

- Wraparound services such as marketing, regulatory, and distribution support are highly valued by entrepreneurs and small producers. As entrepreneurs face challenges in positioning products, especially when their offerings do not fit neatly into established product categories, they need support in finding the right retail channels and marketing their brands.
- Some businesses are also exploring partnerships with CSA-style delivery services to expand their customer base.
- There is interest/need for a regional ordering platform to serve as a retail outlet and facilitate direct sales to consumers, schools, and institutions.

Food System Organizations

Alachua County has an array of mission-driven organizations addressing various food access challenges. Interviewees highlighted four key themes: (1) Accessibility and proximity, (2) Distribution and infrastructure, (3) Programming and services, and (4) Cultural inclusivity.

Accessibility and proximity

- Many residents, especially in east Gainesville, lack access to full-service grocery stores forcing them to rely on food pantries and other emergency food sources.
- There are limited transportation options for low-income residents, requiring them to frequent convenience stores that offer limited fresh food options.

Distribution and infrastructure

- There is a need for more outlets and distribution for end consumers, beyond just farmers markets.
- Food access organizations face challenges around storage, logistics, and the cost of purchased products, which a food hub could potentially help address through shared infrastructure and systems.

Programming and services

- Interviewees have cited cuts to food assistance programs like SNAP and EBT that have made it harder for low-income individuals to purchase fresh produce from local farms.
- Stakeholders emphasize the need for long-term, committed plans and funding to support community-based food initiatives.

Cultural inclusivity

- Language barriers and lack of cultural inclusivity at some food pantries also prevent certain community members from accessing these resources.
- Stakeholders have emphasized the importance of food pantries considering the specific needs and use cases of different customer segments when addressing factors such as location, hours of operation, and variety of options, rather than making assumptions based on overall usage statistics.

Given these challenges, there is a desire to better connect local farmers and producers with food pantries and distribution centers to increase the availability of fresh, culturally relevant produce and ingredients. Some have shared that there is a lot of excitement around improving the local food system in the community, but historically there has also been a lack of clear action on how to effectively scale and implement these ideas. This has left many community members, farmers, and others feeling frustrated.

FOCUS GROUPS

To hear from additional community members with an integral role in the local food system, several focus groups were organized in August 2025¹⁴. Led by Grace Grows, three focus group sessions were held, each focusing on a specific stakeholder group: community organizations (08/08/2025), small farmers (08/26/2025), and food businesses (08/26/2025). The focus groups attracted nineteen total participants, with five to eight representatives attending each meeting.

¹⁴ See the appendix for the guide to facilitate focus groups

TABLE 11: FOCUS GROUP PARTICIPANTS

NAME	TITLE	ORGANIZATION/ COMPANY	TOPIC
Ange Asanzi	Researcher	University of Florida	Community orgs
Courtney Jones	Resident Services coordinator	Sweetwater Square	Community orgs
Crystal Baker	Farm to School coordinator	Alachua Farm to School	Community orgs
Laura Gonzales	Director	Language Access Florida	Community orgs
Meghan Williams		Circles Gainesville	Community orgs
Trish White	Family engagement specialist	Gainesville Empowerment Zone	Community orgs
Amnaya Awasthi	Manager	Braised Yum	Food businesses
David Ward	Chef/owner	Kuro Nami	Food businesses
Doug Mays	Owner	Backyard Grill and Smoke	Food businesses
Erinesha Hamilton	Executive director	Slick Garden	Food businesses
Lauren Poe	President/CEO	Greater Gainesville International Center	Food businesses
Marie Cadet	Manager	For Healing the Nations	Food businesses
Natkingcole Cadet	Founder	For Healing the Nations	Food businesses
Sagar Kumar	President	Krishna Lunch	Food businesses
Bambi Liss	Owner	(unnamed farm)	Small farms
Carol Levine	Owner	Cedar Acres Kunekune Farm	Small farms
David Stillwell	Manager	Sylbeez	Small farms
Doug Mays	President	Backyard Grill and Smoke	Small farms
Sybil Stillwell	Owner	Sylbeez	Small farms

Community Organizations

Six people participated in the focus group for community organizations. One participant had been involved in an interview, and the rest had not, yet they independently highlighted and corroborated the themes captured from these stakeholders in the interviews.

Accessibility and proximity

- Access to affordable, healthy food remains a significant challenge, particularly for communities in east Gainesville and families experiencing economic constraints.
- Transportation barriers, limited store options, and reduced SNAP benefits create additional hurdles for accessing nutritious food, especially after the first two weeks of each month.

Inclusivity and cultural considerations

- Cultural food preferences and preparation methods need to be respected, with participants emphasizing the importance of having diverse food options that reflect different cultural backgrounds.

- Language accessibility and cultural competency in food distribution settings are crucial for immigrant communities to feel welcome and able to access services.

Infrastructure and operational needs

- Consistent hours of operation that accommodate working families are needed.
- To serve different geographic areas effectively, consideration should be for multiple accessible locations rather than a single centralized hub.

Programming and services

- Workforce development opportunities, including culinary training and entrepreneurship support, could benefit youth and community members interested in food-related businesses.
- Educational programming should focus on practical skills while respecting existing knowledge, avoiding terms like "educating" in favor of collaborative learning approaches.
- Reliable funding sources are essential for long-term sustainability.

Small Farmers

Five people representing four very small farming operations participated in the focus group. They reiterated a few conclusions heard during farmer interviews while bringing up some new ideas such as youth engagement and improved collaborations between growers.

Infrastructure and operational needs

- Farmers expressed needs for packaging materials, cooling space, storage, and distribution support.
- Interest in regional facilities for agriculture as well as animal protein processing.

Food access and community impact

- Multiple participants highlighted food deserts in Alachua County and emphasized serving lower socioeconomic areas.
- Food waste reduction and support for existing food banks were identified as key opportunities.

Education and workforce development

- Participants emphasized the importance of teaching cooking skills and nutrition education to support food access.
- Youth engagement through technology and job training was suggested as a critical component.

Governance and partnerships

- A desire was expressed for a collaborative network between farmers to support crop rotation and resource sharing.
- Participants recommended that a food hub could consider a hybrid governance model with business expertise answering to a board of farmers.

Food Businesses

The food business focus group brought together eight participants who are involved in foodservice operations, nutritional services, and supporting emerging food businesses. This group emphasized the need for enhanced entrepreneurial support systems, including physical infrastructure, educational programs, networks, and mentorship support.

Infrastructure

- Commercial kitchen access emerged as a critical need, with multiple participants citing challenges finding kitchen space, especially after Working Food's announced closure.
- Cold storage infrastructure, particularly freezer facilities, was identified as an essential component for food businesses.

Education and support services

- Participants emphasized the need for business education, mentorship, and entrepreneurial guidance, particularly for international and immigrant food entrepreneurs.
- Cultural competency and language accessibility were highlighted as important considerations, with recommendations for services in multiple languages, including Spanish, Haitian Creole, Portuguese, and Mandarin.

Location and accessibility

- With regards to feedback for a potential food hub, participants noted that a facility should be accessible to east Gainesville residents while suggesting that multiple distributed locations throughout Alachua County could serve different needs.
- Public transit access and walkability were identified as key factors for location planning.

Governance and sustainability

- Transparency and meaningful incorporation of community feedback were highlighted as essential elements for sustainable operation.
- Participants advocated for a community-led governance model with representation from diverse stakeholders.

INTERVIEWS AND FOCUS GROUPS – KEY TAKEAWAYS

- Many small farmers face labor constraints but still **desire to explore opportunities to diversify and seek new sales channels.**
- Farmers, food processors, and other small businesses communicated a **need for business training with an emphasis on marketing support.**
- Seafood and livestock farmers shared the **desire for local aggregation and processing facilities supporting the animal ag industry.**

- **Storage infrastructure, especially cold storage**, is important for many growers who seek to extend shelf life, especially given the region climate.
- Foodservice and value-added packaged goods businesses cite **limited commercial kitchen capacity** and need for additional production and storage.
- **Institutional buyers** are generally interested supporting local food production but **highlight limited budget along with procurement restrictions** as possible barriers.
- Buyers require **consistent product types and predictable supply** to meet orders for menus that are often planned weeks in advance.
- Multiple stakeholders share **interest in exploring a hub-and-spoke model** for a food hub if it allows for increased food access to more communities than a centralized model.
- **East Gainesville is often referenced as a location** for a food hub that would satisfy the greatest food access demand.
- Stakeholders greatly value **transparency and community involvement** through the Fresh Food Pathways program process.
- **Food access programs are culturally relevant** in terms of both language and food products.

FOOD HUB FACILITY AND PROGRAMMING INPUT

The table below consolidates the interview and focus group insights, associating them with key aspects of a food hub in terms of programming, operations, and facility design.

TABLE 12: KEY INTERVIEW AND FOCUS GROUP IMPLICATIONS FOR PROGRAMMING, OPERATIONS, AND FOOD HUB DESIGN

FEATURE	INSIGHT
THEME: PROGRAMMING	
Aggregation and distribution	<p>Farmers have affirmed the interest/need in aggregation and distribution services that can connect them with more buyers, especially from institutions.</p> <p>Some have suggested that an online marketplace could support ordering and logistics.</p> <p>Some have noted that coordinating supply and demand while ensuring consistent quality and availability of products may be a logistical challenge.</p>
Supply chain	<p>To ensure the extension of product shelf life in a facility, including cold storage, would be necessary for both the producers and buyers.</p> <p>Refrigerated hauling is an important factor in ensuring farmers could meet buyer needs and buyers could have product delivered.</p> <p>Aside from food, cold, and dry storage, some farmers suggested that it would be efficient and useful to offer storage for bulk items at a food hub (e.g., compost, tools, bulk cover crop seeds, curing produce, root cellar).</p>
Development, training, and event resources	<p>There was emphasis on training and support for marketing, food safety, and regulatory compliance. Partnerships with community organizations and educational institutions could help provide training and outreach:</p> <ul style="list-style-type: none"> ○ food safety training ○ marketing for farmers and small businesses ○ coaching farmers how to sell to institutions ○ certification for farmers (grant funding for this)

FEATURE	INSIGHT
	<ul style="list-style-type: none"> ○ nutrition education ○ employment hub—connecting workers with farms <p>Interviewees would use classroom space for programming.</p> <p>Zero waste programming (UF/IFAS)</p> <p>Affordable event space</p>
Retail	<p>Interviewees mentioned the opportunity for grocery delivery or a mobile grocery unit in underserved communities, with examples like community drop-off points as options to consider.</p> <p>Indoor farmers market</p> <p>D2C retail</p> <p>Open multiple days a week</p> <p>Space for food trucks (storage and sales)</p>
Commercial and/or shared kitchen	<p>Valuable to entrepreneurs, small food producers, farmers</p> <p>Farmers specifically mentioned the need for processing, including value-add products. Value added products include produce, meat, and seafood.</p> <p>Institutional buyers, especially schools, cited an interest in lightly processed produce.</p> <p>Communal kitchen processing was suggested as a community programming idea.</p>
THEME: OPERATIONS AND PARTNERSHIPS	
Operator experience	<p>Managing distribution logistics</p> <p>Knowledge of aggregation/distribution systems and operations</p> <p>Marketing of food hub offerings</p> <p>Ability to develop and manage an eCommerce platform</p>
Universities, government agencies, and community organizations	<p>Partnerships with institutions that have existing relationships can support programming offerings and build community trust.</p> <p>A hub-and-spoke model or multi-location hub may meet the diverse population’s needs.</p>
Collaboration/representation	<p>Including farmers, food producers, and community members is crucial for the effective management and operation of a food hub.</p> <p>Avoiding the perception of the project being run by a single individual or organization is important for building trust and buy-in.</p>
Operational partnerships	<p>Several organizations mentioned that they would be interesting discussing a running a pilot, developing a partnership or having a component of the hub co-locate at their business, including:</p> <p>Swallowtail Farm, Traders Hill Farm, Slick Garden, Stoke Barn, Frog Song Farm</p>
THEME: FACILITY AND DESIGN	
Location	<p>Several people emphasized the importance of locating a food hub in an area of increased food access need such as the east side of Gainesville.</p> <p>Several interviewees suggested repurposing the vacant former Food Lion grocery store in east Gainesville as a potential location. The existing infrastructure may ease the development</p>

FEATURE	INSIGHT
	<p>timeline and reduce costs. Additionally, the proximity to Eastside High School is also seen as a potential benefit, allowing for collaboration with the school's culinary program.</p> <p>In terms of accessibility, it was registered that proximity to a highway while also being accessible by public transit would be advantageous.</p>
Community access	<p>Accessible design</p> <p>Cross cultural offerings that can target a variety of stakeholders throughout the community and consideration for language barriers</p> <p>There is a desire for the food hub to serve as a community gathering space and hub for educational programming around nutrition, cooking, and sustainable agriculture.</p>
Flexibility	<p>Respondents highlighted interest for a facility to have flexibility to adjust to multiple functions, including as a space for disaster response.</p>

SURVEYS

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 five weeks, from July 9 to August 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, Alachua County's Facebook page, County Commissioner Anna Prizzia, the Food System Coalition, UF/IFAS, and the Gainesville Chamber of Commerce

SURVEY METHODOLOGY

Instead of developing one survey for each of the six identified stakeholder groups, potentially complicating outreach efforts, a single responsive survey was developed to guide respondents in a streamlined fashion depending on their role in the food system.

In advance of public dissemination, the project team as well as several advisory members beta-tested the survey to provide guidance on content, flow, and accessibility. Additionally, the survey was translated to Spanish to reach a wider audience of food businesses and farmers.

The total survey contained seventy-three questions; the average survey length was eleven minutes.

RESPONDENTS

Within five weeks, 378 completed surveys were recorded, nearly four times the survey outreach goal. While most surveys were completed in English, 5 were completed in Spanish.

All respondents reside in Alachua County, with the largest concentration of responses from people who live in central or northeast Gainesville (Q6). ZIP Codes included 32601 (50 respondents), 32605 (43 respondents), 32609 (39 respondents). Seventy-three percent of respondents identified as female, and 27 percent identified as male (Q84). The median age group was 50–59 years old, and the median annual income was between \$90,000 and \$129,999 (Q87).

Of the respondents, 80 percent identified as consumers, 8 percent as food system or community advocates, 8 percent as farmers, 3 percent as foodservice, 1 percent as retail, and 1 percent as CPG (Q12).

FIGURE 7: RESPONDENTS INCLUDED LARGE CONCENTRATIONS FROM CENTRAL AND NORTHEAST GAINESVILLE (Q6)

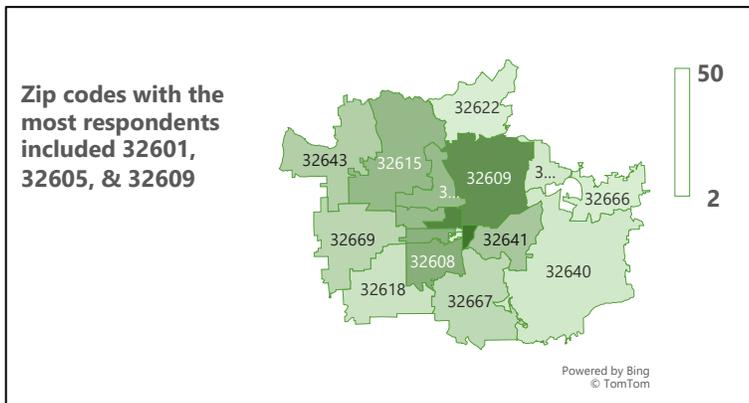


FIGURE 8: MEDIAN AGE OF SURVEY RESPONDENTS WAS BETWEEN 50-59 (Q83)

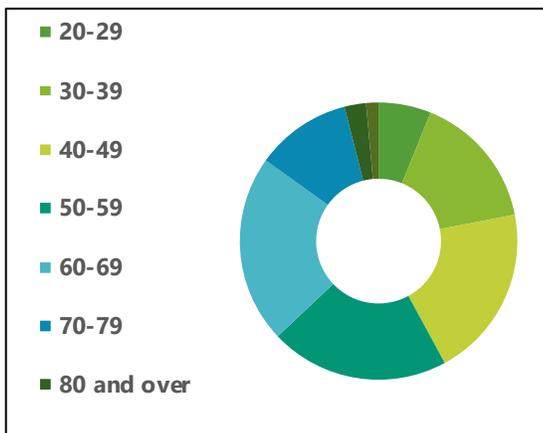


FIGURE 9: MEDIAN INCOME OF SURVEY RESPONDENTS WAS BETWEEN \$90,000-\$129,999 (Q87)

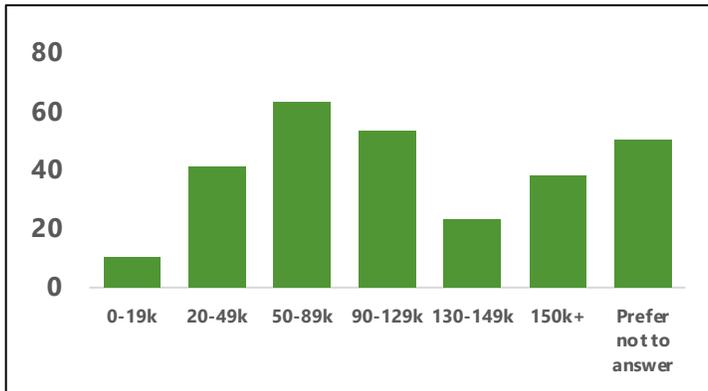
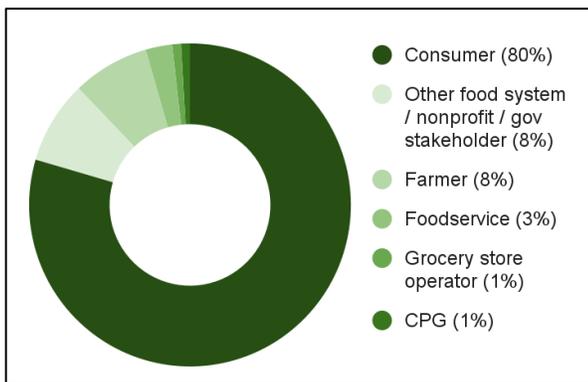


FIGURE 10: ROLE IN THE FOOD SYSTEM (Q12)



SURVEY ANALYSIS

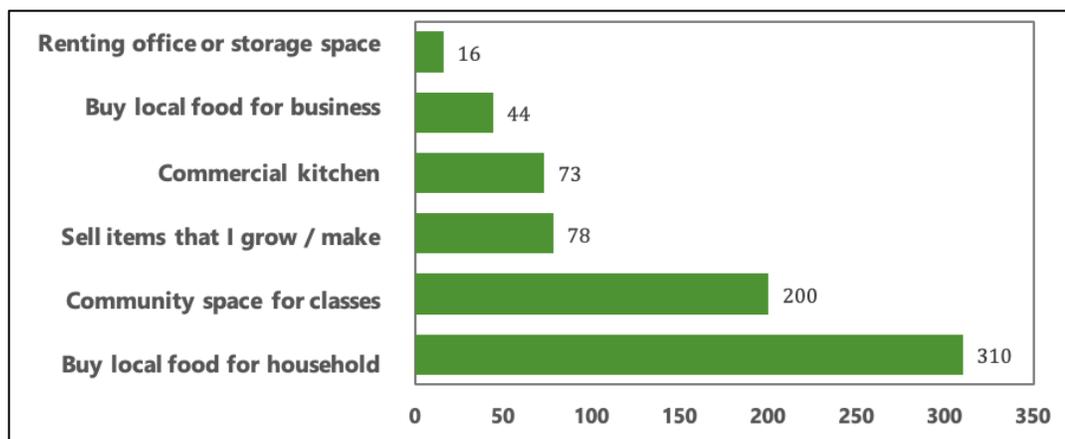
The overall response to the need for a local food hub was quite strong. Eighty-five percent of respondents felt a food hub would or might benefit their community. Respondents showed interest primarily in two food hub components (Q10):

- opportunity to buy more local food
- creating a community space to take or host classes

Of the 15 percent who did not agree with the need for a food hub,

- 47 percent cited the existence of nearby farmers markets
- 34 percent cited concern over possible government oversight food supply
- 19 percent concerned it would not be valuable use of county resources

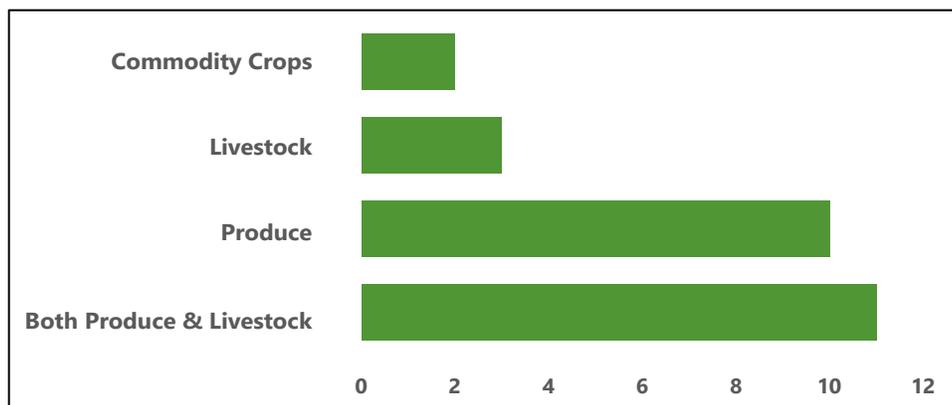
FIGURE 11: INTEREST IN KEY FOOD HUB FEATURES



Farmers

Twenty-six farmers completed the survey, a majority of whom represent small farms. Ninety percent of produce growers operate on less than twenty-five acres. Sixty-seven percent of the livestock ranchers and farmers operate on less than fifty acres (Q17, Q22).

FIGURE 12: FARMER BUSINESS BY TYPE (Q16)

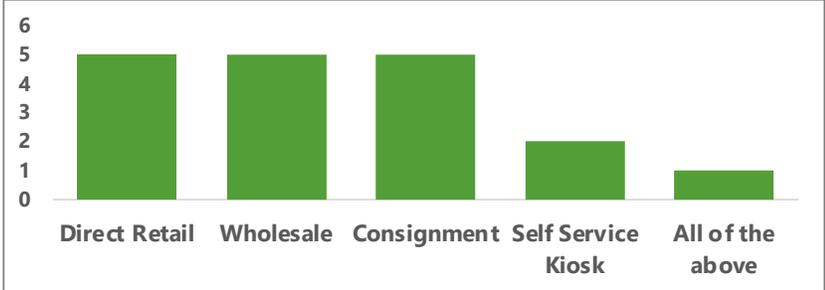


Most growers claim to follow organic, regenerative, or pasture-raised sustainability practices (Q25). Aligned with these values, 77 percent of farmers either donate, sell, or have an interest in being able to more easily donate excess or unused product to food access organizations or those in need (Q28).

Yet, small farmers highlighted several operational challenges that affirm the project’s hypothesis (Q39). Labor, product volume, access to distribution and transportation infrastructure, and conforming to food safety and licensing requirements from buyers are all top of mind, especially as 95 percent of respondents seek to grow their business through new channels and vending opportunities (Q37).

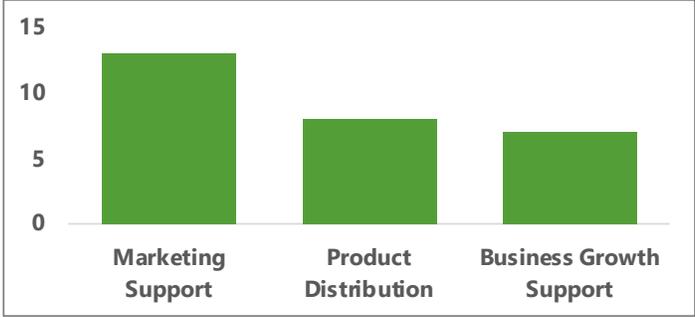
However, when asked about farmers markets specifically, they were ranked both the least popular (10) as well as most popular (2) place to distribute products, amplifying the need for additional retail as well as accessible B2B distribution opportunities (Q36).

FIGURE 13: FOOD BUSINESS VENDING CHANNELS OF INTEREST (Q38)



When asked of top services that a food hub might be able to provide, growers cited marketing support (13), product distribution (8), and business growth support (7) as the top three most valuable resources to offer, highlighting a need to integrate workforce and business training programs into a model (Q40).

FIGURE 14: TOP FOOD HUB SERVICES NEEDED FOR FARMERS (Q40)



Buyers

Food buyers are the stakeholder group who are seen as a potential bulk or wholesale purchasers of food from an aggregation hub. This group includes restaurants, mobile food businesses, caterers, consumer product processors, and large-scale dining institutions such as the University of Florida and the Alachua public school system.

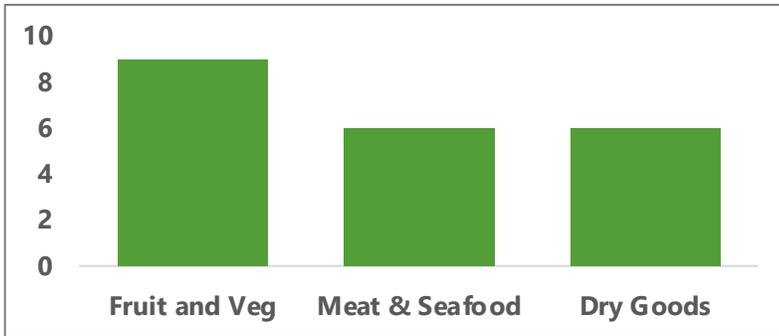
The buyer group highlighted pricing, product quality, availability, diversity, order minimums, and traceability as challenges to purchasing more locally grown food. Similarly, when asked about top priorities when purchasing from a supplier, product availability and competitive pricing were also the top responses (Q49). The majority of buyers said that local products would have to match conventional product price to incentivize purchasing (Q51). With key institutions and foodservice operations managed on a tight budget by third-party contractors, there is a potential challenge to long-term adoption when needing to compare pricing with conventionally harvested food.

FIGURE 15: TOP PRIORITIES WHEN PURCHASING FROM A SUPPLIER (Q49)



Of the products that were of most interest to buyers, fresh fruit or vegetables (sliced or whole) (9), fresh meat or seafood (6), or dry goods, such as milled or value-added products (6), were tracked with the most demand (Q47).

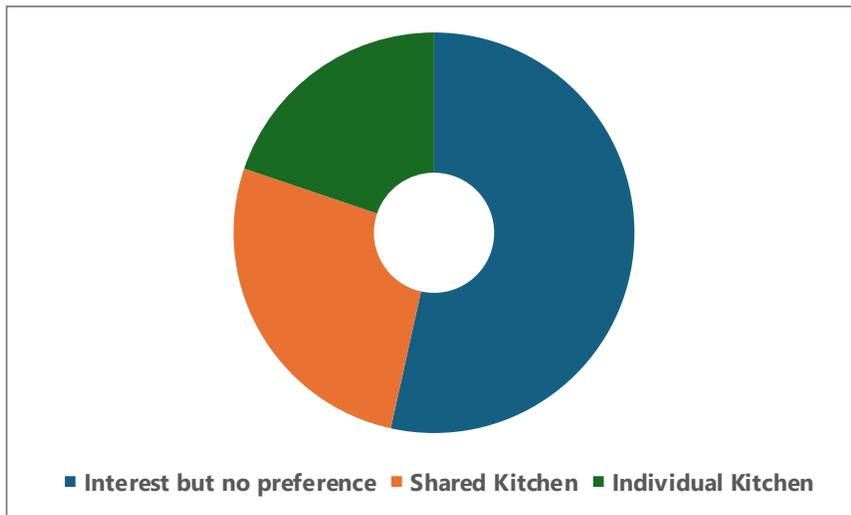
FIGURE 16: BUYER FOOD PRODUCT INTEREST BY TYPE (Q47)



Commercial Food Production Demand

The secondary market analysis highlighted the limited resources for emerging food businesses in need of flexible kitchen space. Whether they are a food truck looking for a prep kitchen or a consumer product that requires manufacturing capacity, only a few spaces exist in Alachua County for these growing businesses to rent or lease. The most notable facility in Gainesville, Working Food, is considering de-emphasizing its shared kitchen operation in lieu of other strategic priorities.

FIGURE 17: TYPE OF COMMERCIAL KITCHEN INTEREST (Q55)



When asked about processing or other commercial-grade needs within a flexible kitchen space (Q56), respondents voiced interest in canning/preservation tools (16), large-scale specialty cooking equipment (13), breadmaking equipment (12), cutting/slicing/shredding fresh product (pre-cut machinery) (11), and the desire to support fermented foods (11).

Community Partners

Of the twenty-six community partners who completed the survey, the two most common roles were **nonprofit partners** (food pantries, local food access, hunger relief) and **educational institutions** (student groups, education, extension programs) (Q42).

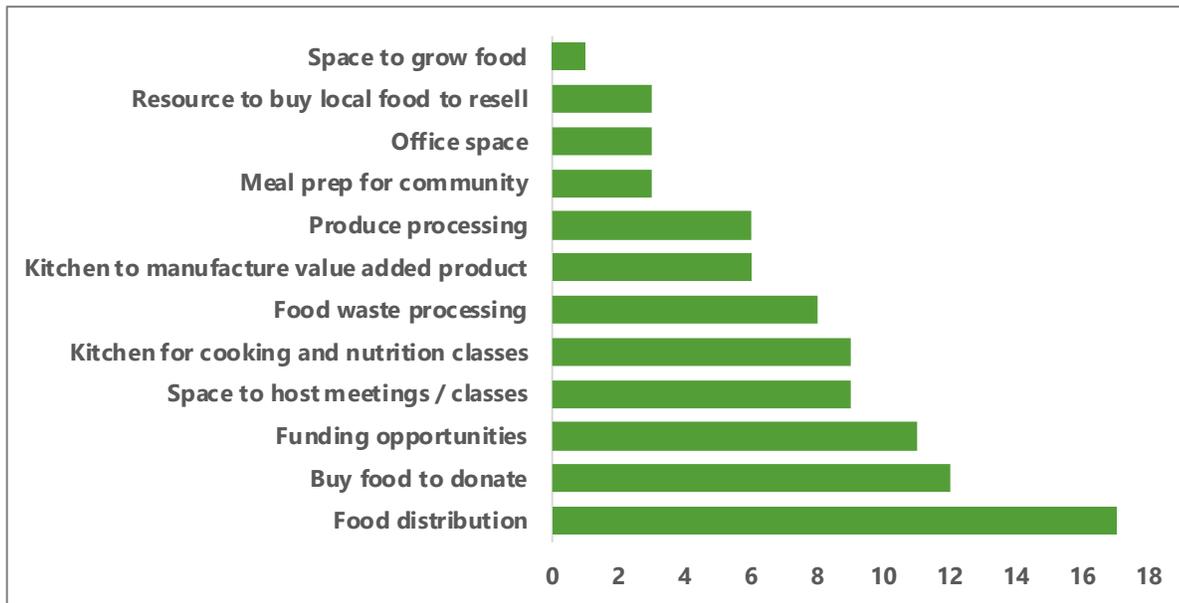
The top priorities for a food hub for this constituency (Q43) included

- increase access to nutritious food options
- increase the amount of affordable food
- increase access to public transportation

While public transit is not directly linked with food systems work, it has been noted as a significant barrier to access, especially in east Gainesville, where there are fewer full-service grocers and a reduced availability of fresh produce.

When asked which kinds of programs or activities may help community organizations grow and achieve their mission, the responses highlighted the need for spaces to aggregate and distribute food as well as space to host meetings, a kitchen to perform nutrition education, and a facility to process food waste (Q44).

FIGURE 18: SOCIAL IMPACT SERVICES TO FURTHER MISSION (Q44)



Individual Consumers

Of the 314 end consumer respondents, the average profile has a two- to four-person household that spends between \$100 and \$150 at least weekly and travels less than thirty minutes one way to purchase food via a personal vehicle (Q63, Q64, Q65, Q62, Q67).

Nearly one in five respondents (19%) report experiencing food insecurity (sometimes or frequently) due to the high cost of essential expenses such as housing, utilities, and childcare (Q67, Q68). This percent is on par with the greater Alachua County poverty rate but lower than the ALICE threshold, which tracks food insecurity.

Almost all respondents (98%) cited interest in a retail store featuring local products. Products of interest include fresh fruit and vegetables, fresh meat and seafood, dairy products, baked goods and breads, and dry goods (Q60, Q78). Seating or gathering space to support additional activities or ready-to-eat food offerings were less important (Q80).

In contrast to wholesale buyers, most end consumers said they are willing to pay above standard pricing for local products (Q74).

FIGURE 19: TOP PLACES END CONSUMERS PURCHASE FOOD (Q61)



Other Includes:
Corner or dollar store (19), Home delivery (15), Other (11),
Food recovery / Donation (9)

SURVEY – KEY TAKEAWAYS

The survey was highly successful in reaching a range of voices throughout Alachua County. Below are the key themes derived from the respondents:

- Although 80 percent of survey respondents identified as end consumers, **75 respondents represented food businesses or food system advocates**, meeting the response goal.
- Aligning with the poverty rate of the county, **20 percent of respondents shared that they face food insecurity**.
- Despite the satisfaction with the existing presence 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 they 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.

- **Community members provided a variety of feedback on potential food hub locations** that included downtown Gainesville, east Gainesville, and northwest Gainesville, among other locales.

IN-PERSON VISIT (SITE EVALUATIONS PART 1)

A site visit during the market analysis phase enabled New Venture Advisors to meet in person with the County, Grace Grows, advisory members, and key stakeholders. Tours of existing organizations related to local food production and distribution, such as Working Food, Bread of the Mighty, and Farm to School Alachua, provided a deeper understanding of the market landscape, current infrastructure, and gaps in the ecosystem, which informed the ongoing interview and survey strategy.

Although the key operational activities of a food hub were not determined in advance of the site visit, touring potential sites helps create understanding of which resources are available in relation to the different stakeholder groups. As a first step in any site evaluation process, an early in-person visit to the local geography helps the project team to understand available local acreage, buildings, and build possibilities to inform future study steps. NVA created an infrastructure guide¹⁵ highlighting the many considerations that should be evaluated, depending on the food hub component or need. These considerations include the following:

- aggregation and storage facilities
- processing and value-added production
- distribution infrastructure
- retail and consumer-facing spaces
- administrative and training spaces
- utilities and mechanical systems
- sustainability/site enhancements

On June 25, 2025, NVA project representatives Andrea Carbine and Avishai Mallinger were joined by Abigail Perret Gentil of Grace Grows and Bailey McClellan of Alachua County to visit five sites that have been identified as having unique and differentiated assets that may support a food hub. While the tour provided insight into the financial resources and future planning needed to develop certain parcels, it should be noted that the sites visited were not indicative of actual site selection. They were examples of existing local infrastructure and resources.

Besides the fact that all sites were in the eastern part of Alachua County, they shared few other similarities. Site 1 was a former grocery store in a shopping plaza located in the southeast corner of Gainesville. Site 2 was a former produce processing and packing facility located off a rural highway fifteen miles (approximately twenty-minute drive) outside of Gainesville. The third site was a small 800-square-foot shared use kitchen housed in a former elementary school that is now the town hall for the town of Waldo. And the fourth site was a forested

¹⁵ See appendix for the site evaluation guide

plot of land owned by the county and slated for development near the Gainesville Airport. NVA also briefly viewed the exterior of the Ben E Keith distribution facility.¹⁶

In addition to a detailed description of each site below, NVA has developed a site evaluation matrix that helps compare assets and resources for each site.

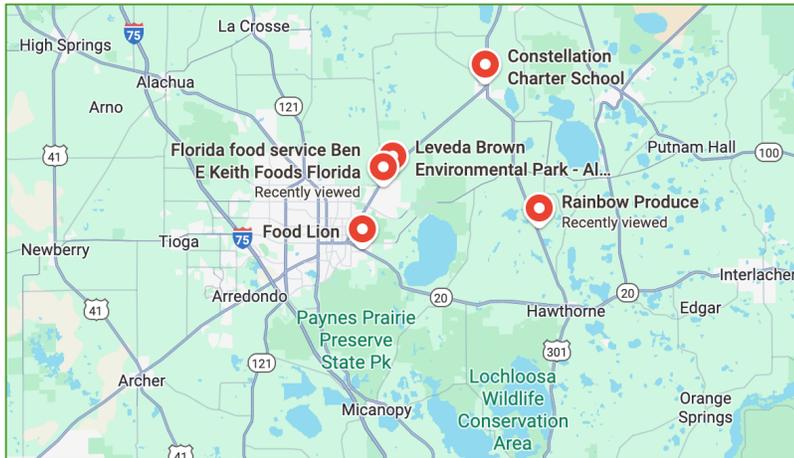


FIGURE 20: MAP OF TOURED SITES BY PROJECT TEAM

Site 1: Former Food Lion

Located off the main thoroughfare of Hawthorne Boulevard in southeast Gainesville, accessible by multiple mass transit bus lines, the former Food Lion exists in 9.58-acre strip mall with ample parking and delivery access. The actual structure is 33,848 square feet and includes two smaller businesses, a quick-service restaurant and a laundromat. The steel frame structure has a concrete block exterior and a drywall interior that appears in decent shape for redevelopment. Four transformers were identified, suggesting it may have enough electrical capacity to power a facility. Given the time since the anchor tenant was last operational, the flat roof may be slated for replacement.

The building contains multiple loading docks; however, they may need updated leveling resources and hardware, and certain electrical or utility components have been stripped and may need to be replaced. The existing food delivery and storage infrastructure suggest the unit could be adapted to support aggregation, storage, or distribution activities. The large retail footprint also lends itself to reimaging the space for an updated consumer-facing retail operation.

¹⁶ This facility was included in the preliminary evaluation process as stakeholders interviewed mentioned that the company may be considering relocating or moving the distribution facility to another location and it may become available for consideration or inclusion in future evaluations.

The proximity to GTEC and the GCRA Hawthorne development may also allow the space to include entrepreneurship, business training, and workforce development programming.

Site 2: Rainbow Produce

A former produce processing and packing facility that included backing from the Department of Defense, the Rainbow Produce facility currently sits empty. The 26,580-square-foot building sits on a 7.3-acre lot, of which 4.5 acres are paved/developed, and is located outside Hawthorne, Florida, on Highway 301, a rural road between Hawthorne and Waldo.

The steel frame and metal façade are in good shape with a main room that is 11,000 square feet, an existing twenty-three-unit HVAC, 500-square-foot freezer, corner drainage, and a cooling chamber.

The existing zoning and rural location suggest it may not be best suited for development as a public-facing market and instead is more compatible food aggregation and processing and processing functionality.

Site 3: Constellation Charter School/Waldo Town Hall

Within the site of the former Constellation Charter School and current Waldo Town Hall is a former cafeteria kitchen that has been used as a shared and flexible rental kitchen in recent years. The kitchen and storage facility is about 1,000 square feet and was previously home to a soup company that recently relocated to Ocala, Florida.

The facility, although limited in space and equipment, contains ovens, cooktops, deep-fryers and a ten-foot hood system, equipment that may lend itself to caterers, mobile food vendors, and food trucks. However, it is fourteen miles outside the urban core of Gainesville where most food trucks operate.

Site 4: Laveda Brown Environmental Park

Located near University of Florida's former IFAS offices and near a waste processing facility, the Laveda Brown site is a forested 127-acre site owned by Alachua County. Given the site's claim by the County, the parcel may be easier than others to develop. However, it will require significant site work to remove trees, grade the land, and integrate electrical, water, plumbing, and sewage infrastructure. The required site work may outweigh certain site acquisition costs. These requirements may also extend the development timeline.

The site is located near the Gainesville regional airport (GNV), two food distributors (PFG and Ben E Keith), and public transit. Given its location on the outskirts of Gainesville, a development on this site may be more suitable for functions related to aggregation, distribution, and production rather than consumer-facing food retail and access operations.

Site 5: Ben E Keith

Multiple interview subjects have noted that Ben E Keith, a leading regional food distributor is looking to develop a larger distribution center outside of Gainesville and closer to the town of Alachua when its current lease expires in 2027. If this decision comes to pass, the existing 13.9-acre site at 5201 NE 40th Terrace might become available.

With three buildings comprising a total of 83,528 square feet, the Ben E Keith facility has the largest existing infrastructure compared to the other four sites visited. It includes nearly 10,000 square feet of offices, a 42,000-square-foot distribution warehouse, and a cold storage/packing facility that is 30,464 square feet. Questions remain whether the site is suitable or perhaps too large for a food hub that may serve the Alachua County region. Like other sites in the region, it is in proximity to (but not located within) a flood zone.

FUNDING AND SUSTAINABILITY CONSIDERATIONS

Alachua County's vision for a full-scale food hub represents a bold step toward transforming the local food economy. Because the specific design of the hub has yet to be developed, the following overview outlines a range of funding mechanisms and tools that could be leveraged once the concept is defined. A funding plan will be presented in part 3 of this study with build and development budgets and models.

Several considerations may create additional strategic advantages, significantly enhancing access to capital and reducing overall project risk through geographic, partnership, and service delivery opportunities.

- **Location advantages** — Positioning hub facilities within CRA (Community Reinvestment Act) or NMTC (New Market Tax Credit)-eligible areas strengthens access to layered funding streams, tax credits, and local reinvestment tools.
- **Partnership leveraging** — Collaboration with universities, nonprofits, and workforce organizations expands eligibility for grants not available to local government alone.
- **Public/private partnerships** — Strategic alliances with private investors, developers, and mission-driven enterprises can unlock additional financing streams, reduce reliance on public dollars, and expand the hub's capacity to deliver community and economic benefits.

BUILDING A FUNDING TOOLBOX

The following provides an overview of *potential* funding vehicles. 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.

GRANTS AND CAPITAL SUPPORT

Federal and state grant programs aimed at agricultural innovation, rural development, and sustainable manufacturing will provide non-dilutive capital for specific project components. Capital grants of over \$1 million are available for projects that demonstrate significant economic impact, while program grants will support workforce development, technology implementation, and operational optimization initiatives. Examples include

- *USDA Local Food Promotion Program (LFPP)* – supports food hub development and expansion of local food systems
- *EDA Public Works and Economic Adjustment Assistance (PWEAA)* – funds infrastructure projects that create jobs, expand capacity, and build long-term regional resilience

Utility and energy rebates can help offset the costs of energy-efficient equipment and green building integration. These incentives support our sustainability goals and financial performance by lowering operational costs while providing upfront capital offsets.

Capital campaigns targeting corporate partners and private foundations can supplement public funding streams. Such campaigns can be tailored to emphasize community impact, equity, and sustainability, creating opportunities for mission-driven investments, naming sponsorships, and philanthropic contributions that strengthen the project's financial base.

FINANCING AND TAX CREDIT OPTIONS

Industrial Development Bonds (IDBs)

As a project integrating agricultural processing and value-added food production, the hub may qualify for up to \$10 million in tax-exempt bond financing. IDBs provide long-term, low-cost capital for construction, equipment, and infrastructure.

- *Example: Florida Development Finance Corporation* – offers access to tax-exempt and taxable bonds for manufacturers and food system facilities

Community Development Financial Institutions (CDFIs)

CDFIs provide favorable terms for projects with strong economic and community impact, making them well-suited for agricultural initiatives. They can offer bridge financing and below-market rate loans in qualified areas.

Tax Increment Financing (TIF) via Community Redevelopment Areas (CRAs)

Within Alachua County's CRAs, TIF mechanisms capture incremental property tax growth and reinvest it into redevelopment. TIF funds may support infrastructure, site improvements, and small business support aligned with approved CRA plans.

New Market Tax Credits (NMTCs)

Parts of Alachua County qualify as NMTC areas. NMTCs attract private investors by offering them up to 39 percent in tax credit benefits, significantly reducing project capital requirements.

- *Example: Florida Community Loan Fund* – deploys NMTCs and revolving loans for qualifying food system and agricultural projects

RESEARCH SUMMARY AND TAKEAWAYS

The market analysis provided insights into existing programs, services, and infrastructure in the region. It also defined the regional agricultural landscape, outlining challenges from key stakeholders and qualifying community demand for potential food network components. Selected takeaways include:

- Many organizations are working to improve Alachua County's food economy and access.
- Despite average food insecurity, a 20 percent 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.
- The region has a strong urban core with a relatively large population of over 280,000. This is over 50 percent above the threshold to accommodate a food hub, according to a study by Stephan Goetz at the University of Pennsylvania.¹⁷
- Adoption of the Good Food Purchasing Program can provide guidance for local procurement practices.
- 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.
- A multi-purpose food hub could boost farmers' incomes and increase consumer access to local produce.

EXISTING SUPPORT AND PROMISING INITIATIVES

There are many promising initiatives that exist within Alachua County to support local food sales, purchasing and consumption. These initiatives may inform models and have the potential serve as supporters to the development, operations, or partnership of specific components and activities of a food hub.

- **The Good Food Purchasing Program**, while not fully implemented across institutions, is a framework providing guidelines for large foodservice providers either to purchase more locally grown products or to partner with local procurement partners.
- **Farm to School Alachua** has a leading model to increase the share of local food in school meals while managing significant cost restraints. Their existing partnership with Traders Hill Farm highlights what is possible to operationalize. While that partnership is successful, there are still challenges to working with smaller local farms, including coordinating inventory, delivery, and other supply chain issues.
- Similarly, the **University of Florida** has been working on sourcing more local food, but the foodservice provider, Chartwells, must approve such procurement decisions. Furthermore, procurement of certain products may require significant advance menu planning given the scale of their operations.
- **Working Food** has existing relationships across the value chain, with growers, students, and food entrepreneurs. However, the project team learned that the organization is shifting strategic priorities

¹⁷ Kristen Devlin, "Location, Location, Location: Where and How Do Food Hubs Flourish?" Pennsylvania State University, July 19, 2019, <https://www.psu.edu/news/research/story/location-location-location-where-and-how-do-food-hubs-flourish>.

and de-emphasizing its shared kitchen and food business infrastructure. This may present an opportunity for other organizations to support these entrepreneurs.

- **Bread of the Mighty** has a leading role aggregating and distributing over 6.5 million pounds of food per year. Their large facility, robust volunteer network, relationship with the larger Feeding Northeast Florida organization, and participation in a new food-as-medicine program suggests they theoretically may have the capacity to support initiatives related to receiving donated food from local farms.
- **Florida Organic Growers (FOG)** has created a peer-to-peer (P2P) online platform to connect stakeholders, share resources, and develop mutually beneficial partnerships across the local food system, including farmers, retailers, restaurants, and nonprofits.
- Several farms engaged in aggregation, CSAs, or retail sales activities voiced interest in participating in a pilot project or exploring other partnership opportunities. They include
 - **Traders Hill Farm** — grows aquaponic lettuces but also has developed a robust aggregation program with other nearby farms. Based in Hilliard, Traders Hill is delivering local produce to fourteen school districts (including Alachua), regional restaurants, large retailers, and distributors such as Sysco and Ben E Keith. They voiced interest in learning more about the Fresh Food Pathways Program, recognizing the opportunity to expand reach further south and west.
 - **Frog Song Farm** — based in Hawthorne; supports the aggregation of approximately two dozen small growers and producers and distribution via a regional member-supported CSA; may be interested in leading a pilot project.
- **Gainesville Teaching and Entrepreneurial Center (GTEC)** is operated by the Gainesville Community Reinvestment Area and backed by the city. They have communicated interest in supporting entrepreneurship programming and technical assistance for food businesses and, perhaps, developing a food incubator.
- The project team heard from several sources that **Santa Fe College** is exploring opportunities to grow its entrepreneurship and business resources, including targeting food businesses. However, the project team could not reach representatives from the college before the publication of this report.

ONGOING CHALLENGES

Aligned with the first goal of the market analysis, several food system challenges were uncovered, providing a roadmap for potential solutions or resources that a food hub may be able to support.

- Multiple interviewees and survey respondents have highlighted an acute food access need. As a contrast to some of the promising infrastructure that exists in the region, many residents, especially around east Gainesville, lack access to affordable fresh fruit and produce. This is due to a variety of reasons, including:
 - Lack of inventory within existing markets.
 - Location of operating retail outlets and challenges with public transit infrastructure.
 - Affordability and barriers to purchasing fresh food.
- Food access organizations and pantries may not have the funds to distribute locally produced food.

- Alachua County has a high proportion of small farms that lack negotiating leverage and may struggle to fulfil large institutional orders.
- Challenges exist for growers to access traditional distribution channels.
- There is need for institutions to work with limited distributors along with specific insurance and food safety requirements.
- Buyers cited a need for product consistency and availability from farmers.
- While several subjects highlighted interest in having more shared kitchen resources available for food entrepreneurs, especially food trucks, a strong CPG or value-added food community was not as robust.
- The economics of the county fluctuate according to the University of Florida school calendar, which can be difficult for growers looking to source distribution partners year-round.
- Multiple consumers shared how important the 441 Farmers Market in Gainesville is to the local food economy as it seeks a new permanent operating location.

FEASIBILITY STUDY: PHASE 1 MARKET ANALYSIS RESEARCH CONCLUSIONS

This initial phase of the feasibility study was designed to assess the first lever of feasibility, which included identifying community needs and objectives and determining whether they align with the proposed project. The analysis did confirm community interest in and support of the project. The proposed infrastructure components and programs would service identified community needs and priorities related to agricultural resources, food access solutions, and food flows.

OPERATING IMPLICATIONS

Food hubs can manifest in multiple ways, with a wide variety of programs and operating activities shaped not just by supply and demand but also by organizational capacity, funding, and infrastructure. These activities address challenges to one of the following nodes in the food system. The market analysis highlighted several solutions that would best serve Alachua County's food system. The primary activities are noted below along with secondary solution suggestions:

Primary

- **Aggregation and distribution:** providing infrastructure and systems for the aggregation, cleaning, storage, and distribution of local food products from producers who do not have the scale to participate in other channels
- **Training and technical assistance:** workshops and programs (especially in marketing and business development) for producers to scale through new sales and distribution channels for existing and/or value-added products; leveraging marketing tactics to increase community awareness and demand for locally grown, processed, and produced food products
- **Retail consumer access:** increasing consumer access to local foods by enhancing existing or creating new retail purchasing opportunities
- **Food processing and manufacturing:** resources and/or infrastructure (such as a commercial kitchen) to support food processing, value-added consumer products, or for ready-to-eat foodservice consumption

Secondary:

- **Supply chain infrastructure:** particularly cold storage solutions to extend shelf life
- **Gleaning:** resources to support the harvest of surplus produce and the distribution to food banks and other food access organizations
- **Food-as-medicine:** addressing nutrition assistance and health outcomes through partnerships among health care providers, fresh-food retailers, and end consumers

The second phase of the project will dive deeper into these operating implications and propose models to meet the needs of the community and test via pilot projects. This includes further evaluation into a centralized hub, or the exploration of a hub-and-spoke model, for which notable interest and support was registered.

NEXT STEPS

The market and landscape analysis is the first of four phases in the full Fresh Food Pathways Program. Based on the feedback from the recommendations in presented in this document, NVA will enter phase 2 of the project. Operating model and pilot projects will address the next lever of feasibility—operational viability— and will include the following work components:

- **Concept model development** – identification of potential structures for the hub and/or network model and the proposed facilities identified as of interest to stakeholders and community members in phase 1
- **Pilot projects** – facilitation and evaluation of a series of approved projects that will support collaboration across organizations, test the organizational capacity, and market for various activities incorporated into a final food hub model.¹⁸ The learnings from these projects will help refine the proposed operating model before site development and financial models are generated.

Following the second phase, the second half of the project will include design development, an operational plan, and a financial plan, culminating in a final report and business plan. A detailed outline of the projects next steps with projected timeline is below in table 13.

TABLE 13: FRESH FOOD PATHWAYS PROGRAM PLAN

<ul style="list-style-type: none">• Propose a range of operating models with case studies and examples• Conduct community concept workshops with all audiences• Based on input, recommend pilot projects to demonstrate functions of a food hub• Finalize pilot project plan• Implement pilot projects, including launching applications, interviews• Evaluate pilot projects	October 2025 – August 2026
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¹⁸ A pilot project plan has already been presented to the project team providing a framework to perform outreach, fund, oversee, and evaluate the forthcoming pilot projects. The pilot project plan is included in the appendix resources.

Phase 3: Food Hub Design	
<p>Compile findings from pilot projects and update operating model recommendations based on results</p> <p>Finalize concept model, design, and financial modeling, including</p> <ul style="list-style-type: none"> • define facility specs and complete facility design • financial analysis • host design charette to gather input • finalize design, operating model, and financial analysis • funding and development plan <p>Present final model with project team and make go/no-go decision</p>	September – August 2027
Phase 4: Business Plan and Final Report	
<ul style="list-style-type: none"> • Create a model business plan for County to support evaluating potential operators • Draft plan and develop RFQ/RFP for operator search • Draft development plan with major milestones over five years • Draft final feasibility report • Share report with project team and present to Board of County Commissioners 	September 2027 – March 2028

APPENDIX

The following resources were developed to support part 1 of the study:

1. Fresh Food Pathways Program Introduction and Overview
2. Community Engagement Plan (Research Plan)
3. Literature Review
4. Fresh Food Pathways Program Secondary Market Analysis
5. Interview Guide: Farmer
6. Interview Guide: Buyer
7. Interview Guide: Food Maker
8. Interview Guide: Community Organizations
9. Focus Group Guide
10. Survey Responses
11. Site Evaluation Guide
12. Pilot Project Plan
13. Market Research Report Presentation