



Connecting the Missing Pieces A Food Hub Feasibility Study for the Greater Lehigh Valley

June 2026

"The region's greatest opportunity may not be the creation of a single new facility, but rather the strategic coordination, expansion, and strengthening of assets that already exist."

Prepared by
Buy Fresh Buy Local Greater Lehigh Valley
and
Nurture Nature Center

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This study was shaped by the many farmers, institutional buyers, food hubs, food access organizations, educators, healthcare leaders, distributors, processors, funders, public agencies, and community partners who generously shared their time, experience, and perspectives throughout the process.

Over the course of a year, one conversation often led to another, creating new connections, partnerships, and opportunities for exploration. The insights shared by producers, buyers, and community organizations helped ensure that this assessment remained grounded in real-world experience and reflected both the opportunities and challenges facing the regional food system.

Most importantly, this report reflects the collective knowledge, commitment, and vision of the many individuals and organizations working to strengthen the Greater Lehigh Valley food system. Thank you for your willingness to share your ideas and help imagine what is possible when we work together.

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EXECUTIVE SUMMARY

Purpose of the Study

This study began with a simple question: what would it take to strengthen local food systems in the Greater Lehigh Valley and create more opportunities for farms, institutions, and communities to work together?

Over the course of nine months, conversations with farmers, buyers, food access organizations, educators, healthcare leaders, funders, and community partners revealed a common theme: many of the assets needed to strengthen the regional food system are already in place, but important gaps remain. Again and again, stakeholders pointed to opportunities to expand local procurement, improve food access, develop value-added products, strengthen workforce development pathways, and create new markets for local farms. At the same time, discussions highlighted ongoing challenges related to coordination, infrastructure, processing, distribution, and long-term leadership.

The study was designed to better understand these opportunities and barriers. In many cases, local products were available, buyers were interested, and community partners were willing to help, yet challenges related to aggregation, processing, packaging, distribution, certifications, and coordination limited the region's ability to fully capitalize on these opportunities.

These challenges are not unique to the Greater Lehigh Valley. Nationally, the U.S. specialty crop sector generates more than \$63 billion annually, yet an estimated 30–40% of specialty crop production is lost before reaching consumers, representing approximately \$18–26 billion in lost value each year. Much of this loss occurs within the aggregation, processing, storage, packaging, and distribution systems often referred to as the "missing middle" of the food supply chain. At the same time, schools, hospitals, correctional facilities, and other institutional buyers collectively spend more than \$120 billion annually on food, representing a significant market opportunity for regional producers and food system enterprises that can successfully connect local supply with this institutional demand. (*Food Systems for the Future Institute 2026*)

The assessment examines current conditions, identifies regional assets and gaps, and explores practical pathways for strengthening the food system.

Although the primary focus of this assessment is the Lehigh Valley, food systems operate across county lines and geographic boundaries. As a result, the geographic scope varies by topic and data source. Certain analyses focus on Lehigh and Northampton counties, while others examine the broader regional foodshed, including adjacent Pennsylvania counties and nearby areas of New Jersey that participate in shared agricultural, market, and food system networks.

The goal is not to prescribe a single solution, but to provide a foundation for informed decision-making and future collaboration. Ultimately, the study seeks to identify realistic opportunities that build upon existing regional assets, strengthen connections across the food system, and support long-term food system resilience.

Study Approach

This feasibility study builds upon *Farm to Community: The Lehigh Valley Food System* (2026), developed by Buy Fresh Buy Local–Greater Lehigh Valley. That assessment identified growing demand for locally produced food, increasing development pressure on farmland, challenges related to farm viability and succession, persistent food access disparities, opportunities to strengthen regional food distribution systems, and the need to address food waste and climate-related impacts across the food supply chain. Findings from that report helped shape the research questions, stakeholder engagement process, and areas of inquiry explored throughout this study.

This study was designed to be practical and grounded in the realities of the Greater Lehigh Valley food system. It was equally shaped by the relationships, conversations, and opportunities that emerged through ongoing engagement with the region's food system stakeholders.

Initial introductions and guidance from state agricultural leaders helped identify key stakeholders across the regional food system. From there, one conversation often led to another. Discussions with producers led to introductions to buyers. Conversations about procurement revealed opportunities related to processing, distribution, product development, workforce development, and food access. As the work progressed, it became clear that many of the challenges and opportunities facing the region extended beyond food hub feasibility alone and reflected broader questions about how to strengthen connections throughout the regional food system.

The assessment was informed by stakeholder interviews, producer and institutional buyer surveys, geographic analysis, IMPLAN economic modeling, secondary research, and ongoing engagement with regional food system initiatives. It also benefited from coordination with parallel efforts, including Blue Zones Greater Lehigh Valley's work related to food systems, food hub exploration, healthy food access, and redevelopment of the Lehigh Valley Food Policy Council. These efforts helped identify potential partners and opportunities, while this study expanded upon those conversations through additional analysis focused on implementation pathways, procurement opportunities, and infrastructure needs.

In several instances, stakeholder discussions progressed beyond information gathering and into practical exploration of procurement opportunities, product development concepts, partnership models, and food system coordination challenges. While not formal pilot projects, these activities provided valuable insight into buyer requirements, producer

readiness, logistical barriers and governance considerations. These real-world experiences helped validate and refine findings emerging through interviews, surveys, and market analysis.

As a result, the findings presented in this report reflect both research and practical observation. They are informed not only by data and analysis, but also by direct engagement with the individuals and organizations actively working to strengthen the Greater Lehigh Valley food system.

Key Findings

1. Institutional Buyers Demonstrated Immediate Demand for Local Products

Stakeholder engagement identified multiple institutional buyers interested in purchasing additional locally produced food. In one example, a major school food service provider provided a list of products it was prepared to purchase immediately from regional producers.

2. Local Procurement Is Increasingly Driven by Practical Business Considerations

While many institutions expressed mission-based interest in supporting local farms, buyers also cited rising produce costs, transportation expenses, supply chain disruptions, and product quality concerns as reasons for exploring local sourcing. Improvements in season-extension infrastructure are creating additional opportunities to meet demand with regionally produced products.

3. Competitive Pricing Is Critical Across the Entire Supply Chain

Competitive pricing emerged as a priority for both producers and buyers. Institutional buyers consistently identified competitive pricing as a primary purchasing requirement, while producers ranked competitive pricing as the most important factor influencing their willingness to participate in a food hub. These findings suggest that the success of any future aggregation, processing, or distribution initiative will depend on its ability to create operational efficiencies that improve market access while maintaining producer profitability.

4. Buyers Consistently Requested Institution-Ready Products

Buyers frequently identified a need for washed, pre-cut, pre-packaged, frozen, and otherwise minimally processed products that align with institutional purchasing requirements. These findings suggest that processing and packaging services may be as important as aggregation and distribution in expanding local procurement opportunities.

5. Value-Added Processing Represents a Significant Opportunity for Market Development and Waste Reduction

Discussions with buyers, producers, educational institutions, and implementation partners revealed strong interest in value-added processing, including washing, cutting,

packaging, freezing, and product development. These activities may improve farm profitability, reduce food loss, create institution-ready products, and generate stronger margins than aggregation alone. Several stakeholders also identified opportunities to process products that are currently underutilized, sold into lower-value markets, or lost due to limited processing capacity.

6. Coordinated Procurement Has Already Been Proven Feasible

Approximately 40 farms successfully participated in wholesale procurement through the Local Food Purchase Assistance (LFPA) program between 2023 and 2025, generating more than \$2.1 million in sales. The program demonstrated existing producer capacity while providing a potential model for future regional procurement initiatives that support both local farms and food access goals. (Second Harvest Food Bank 2025)

7. Existing Production Is Not Always Reaching Existing Markets

Stakeholders repeatedly identified a "missing middle" within the regional food system, including gaps in aggregation, processing, packaging, storage, distribution, and market coordination. In many cases, products already being grown within the region are not consistently reaching local buyers due to infrastructure and coordination challenges rather than a lack of demand.

8. Expanding Participation Will Require Investment in Producer Readiness, Capacity, and Coordination

While buyers demonstrated interest in purchasing additional local products, questions remain regarding the acreage, production volume, season-extension capacity, certifications, labor availability, and technical assistance needed to meet demand consistently. Mapping and stakeholder engagement revealed that only a small percentage of regional farms currently maintain the certifications commonly required by distributors and institutional buyers, highlighting the need for additional producer support and capacity-building efforts.

9. Educational Institutions Represent a Significant Opportunity for Food System Innovation and Workforce Development

Educational partners identified opportunities to support workforce training, product development, processing, branding, marketing, and entrepreneurship activities related to local food systems. These partnerships may provide cost-effective ways to expand food hub functions while creating educational and career pathways for students.

Regional Readiness and Partnership Capacity

One of the most significant findings of this assessment is the level of regional commitment already demonstrated for coordinated food system development. During the study period, stakeholders came together to develop a USDA Regional Food System Partnership (RFSP) proposal focused on strengthening farm-to-institution purchasing pathways, supporting food procurement and value-added processing pilots, and perhaps most importantly, re-

establishing the Lehigh Valley Food Policy Council as a long-term regional coordination structure.

The proposal attracted support from producers, institutional buyers, food access organizations, educational partners, public agencies, healthcare organizations, and community stakeholders. **Five of these regional partners committed approximately \$270,000 in matching funds, demonstrating substantial local investment in future food system development efforts.**

Beyond the RFSP proposal, several complementary initiatives have emerged that align with key findings of this assessment. Northampton County's Grow NORCO grant (Northampton County DCED, 2026) awarded to BFBL-GLV is supporting further exploration of value-added processing opportunities, while an emergency food access committee has sparked discussions around creating a locally funded purchasing and procurement model based on the success of the LFPA program.

The region's greatest asset may be its growing network of committed partners. While infrastructure gaps remain, the level of stakeholder engagement, partnership development, and collaborative planning observed throughout this study suggests that the Greater Lehigh Valley possesses significant capacity to advance food system initiatives and move from planning toward action.

Feasibility Assessment

Findings from this assessment suggest that efforts to strengthen local procurement, expand value-added processing, improve coordination, and develop food hub functions within the Greater Lehigh Valley are feasible, provided they are pursued through a phased and collaborative approach.

The study identified strong demand from institutional buyers, a foundation of producer capacity that can be built upon, opportunities for value-added product development, emerging educational partnerships, and significant regional support for food system development. Stakeholders also demonstrated a willingness to collaborate through procurement pilots, Food Policy Council development, and the proposed USDA Regional Food System Partnership initiative.

The assessment also identified challenges related to aggregation, processing, packaging, distribution, market coordination, and the need to better understand and expand regional grower capacity. These findings suggest that immediate investment in a large-scale centralized facility may be premature. Instead, the strongest opportunities appear to lie in strengthening coordination, testing procurement and processing models, expanding producer readiness, and building upon existing regional assets. National research suggests that targeted investments in post-harvest infrastructure can generate an estimated \$3–4 return for every \$1 invested through reduced waste, improved product

quality, and increased producer income, supporting a phased approach focused on strategic investments in processing, storage, and other "missing middle" functions. (*Food Systems for the Future Institute 2026*)

Overall, the study concludes that the Greater Lehigh Valley possesses many of the ingredients necessary to support a stronger and more connected regional food system. Success will likely depend not on a single project or facility, but on the region's ability to strengthen partnerships, address gaps in the "missing middle," and continue moving from planning toward implementation through phased and strategic investments.

Recommendations and Next Steps

Immediate Priorities (0–12 Months)

- Secure funding and launch the USDA Regional Food System Partnership (RFSP) initiative.
- Implement the Northampton County DCED-funded Grow NORCO project, including expanded feasibility analysis and development of a value-added processing pilot designed to test market opportunities, operational requirements, and potential processing models.
- Re-establish the Lehigh Valley Food Policy Council and support development of long-term governance structures.
- Finalize pilot project design, partner commitments, and implementation plans for procurement and processing activities.
- Identify a lead entity or operating structure capable of coordinating procurement pilots, contracts, payments, insurance requirements, and liability management during the pilot phase.
- Continue discussions regarding long-term organizational and operational structures needed to support future food hub functions.
- Build upon existing relationships with institutional buyers to identify products that can be purchased immediately from regional producers.
- Expand producer engagement efforts focused on certifications, institutional market readiness, crop planning, and season extension opportunities aligned with buyer demand.

Near-Term Priorities (1–3 Years)

- Assess and expand regional grower capacity needed to meet demonstrated demand from institutional buyers, processors, distributors, and food access organizations.
- Identify and expand participation in existing regional market opportunities by connecting producers with processors, distributors, institutional buyers, and food access organizations that have demonstrated demand for locally produced products.

- Support producers interested in transitioning production, expanding acreage, adopting season-extension practices, or pursuing certifications needed to meet identified market opportunities and buyer requirements.
- Expand producer support programs focused on crop planning, season extension, wholesale readiness, food safety certifications, and market development.
- Implement procurement and processing pilots to test aggregation, coordination, and distribution models.
- Develop a regional procurement model that builds upon lessons learned through LFPA and existing emergency food system partnerships.
- Expand collaboration with Second Harvest Food Bank and regional food access organizations to explore coordinated purchasing approaches that support both local farms and food access goals.
- Explore opportunities to establish an early virtual food hub model utilizing existing procurement and distribution networks.
- Evaluate and implement appropriate ordering, sales, and procurement management tools to support pilot activities, improve communication between buyers and producers, and streamline coordination of purchasing, invoicing, and reporting.
- Identify products currently going to waste, being sold into lower-value markets, or lacking market access and evaluate opportunities for value-added processing and market development.
- Explore opportunities for flash freezing, value-added processing, packaging, branding, and product development using existing regional assets.
- Advance educational partnerships with institutions such as Bethlehem Area Vocational-Technical School, Northampton Community College, and other regional workforce development partners.
- Evaluate and implement appropriate ordering, sales, and procurement management tools to support pilot activities, improve communication between buyers and producers, and streamline coordination of purchasing, invoicing, and reporting.

Long-Term Opportunities (3–5+ Years)

- Determine whether a dedicated food hub operator, cooperative structure, nonprofit entity, social enterprise, or other organizational model is needed to support long-term growth.
- Evaluate infrastructure investments based on demonstrated demand and lessons learned through pilot activities.
- Scale successful procurement, processing, and distribution models demonstrated through pilot activities, educational partnerships, and regional market development efforts.

- Continue leveraging the Lehigh Valley Food Policy Council as a mechanism for coordination, fundraising, strategic planning, grant development, and regional food system leadership.
- Strengthen connections between agriculture, food access, workforce development, education, economic development, and public health initiatives to support a more resilient and equitable regional food system.

Ultimately, the study recommends a phased approach that builds upon existing assets, demonstrated market demand, and emerging regional partnerships. Rather than prioritizing major capital investments, the findings support testing food hub functions through procurement pilots, value-added processing initiatives, producer support programs, and coordinated market development efforts. This approach allows the region to generate early successes, build trust among growers, reduce risk, and evaluate long-term infrastructure needs based on demonstrated demand and operational experience.

Taken together, the RFSP initiative, Grow NORCO project, Food Policy Council development, and other regional efforts provide a unique opportunity to move from planning toward implementation. The challenge is no longer identifying opportunities—it is connecting them. Producers are looking for markets. Buyers are seeking local products. Processors need regional supply. Educational institutions, food access organizations, and community partners are already engaged. The opportunity now is to bring these pieces together in ways that allow the entire system to grow.

CHAPTER 1. INTRODUCTION

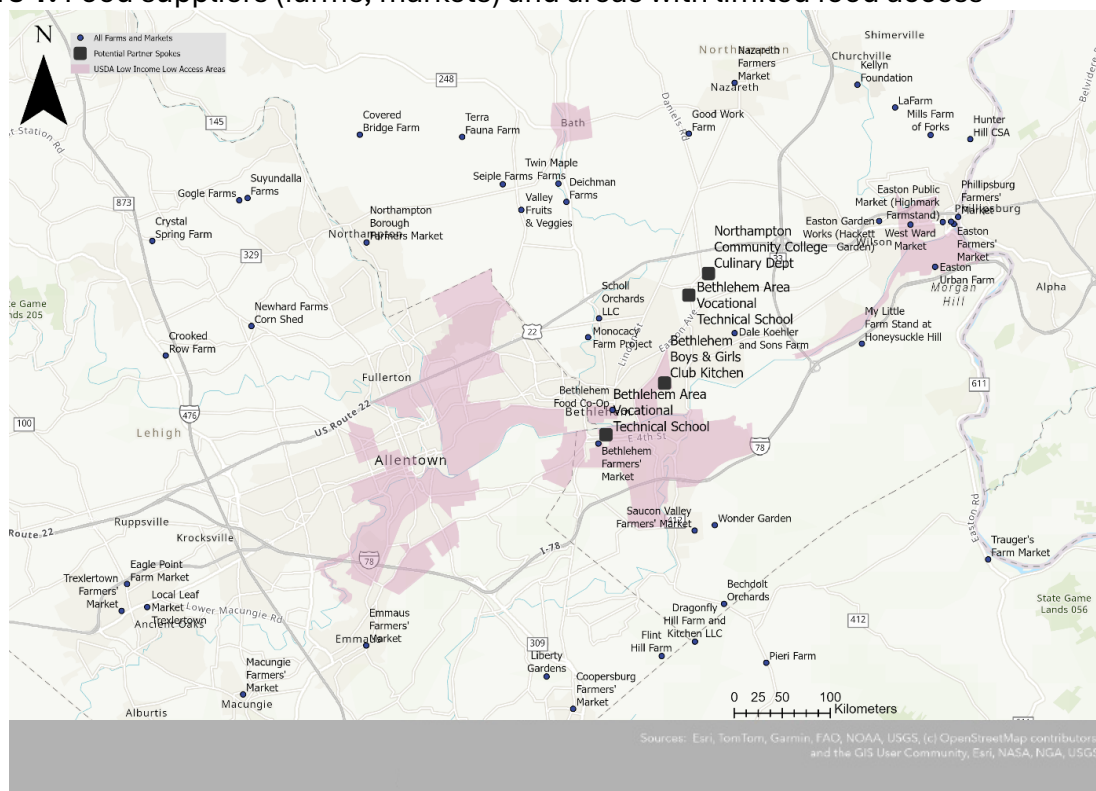
1.1 Regional Food System Context

The Lehigh Valley's food system sits at an important crossroads.

The region continues to grow, with the population projected to increase from nearly 697,000 residents in 2023 to more than 753,000 by 2040. The population is also becoming more diverse and older, trends that will influence food preferences, nutritional needs, and demand for culturally relevant foods in the decades ahead. At the same time, food insecurity remains a significant and growing challenge. More than 87,000 Lehigh Valley residents experienced food insecurity in 2023, up from approximately 59,000 residents in 2021. Poverty and food access challenges are especially concentrated in the region's urban centers, where 22 percent of Allentown residents, 18 percent of Easton residents, and 16 percent of Bethlehem residents lived in poverty in 2023. (*Buy Fresh Buy Local* 2026)

Food access barriers are not limited to urban neighborhoods. USDA low-income, low-access census tracts are concentrated in Allentown, Bethlehem, and Easton, but also appear in rural northern communities such as the Slate Belt, where distance from full-service grocery stores and transportation limitations create additional challenges. These conditions are especially concerning for families with children. Child poverty reached 31 percent in Allentown and Easton and 24 percent in Bethlehem, reinforcing the importance of connecting food access strategies with schools, childcare providers, and family-serving organizations.

Figure 1. Food suppliers (farms, markets) and areas with limited food access



The Lehigh Valley has responded to these challenges with innovation and collaboration. Fifteen producer-only farmers markets across the Lehigh Valley, including a growing number of winter markets, have expanded access to local food while creating direct market opportunities for farmers. Mobile markets, including the Kellyn Foundation's mobile market, help reach residents who may be working, transportation-limited, or unable to consistently afford fresh food through conventional retail channels. Fifty-five school gardens and numerous community garden programs also play an important role by expanding local food production, improving diets, strengthening social connections, and increasing neighborhood resilience. (*Buy Fresh Buy Local* 2026)

Charitable food organizations and local procurement initiatives have also become increasingly important. Programs such as the Local Food Purchase Assistance (LFPA) initiative demonstrated the power of coordinated regional purchasing, directing nearly \$1.9 million to local farms while distributing more than 2 million pounds of food through charitable food networks. Together, these efforts have strengthened communities throughout the region and highlight both the demand for and value of locally produced food.

Institutional partnerships are also becoming increasingly important components of the regional food system. St. Luke's University Health Network (SLUHN), which operates 16 campuses throughout the Greater Lehigh Valley, maintains a 14-acre certified organic farm in partnership with Rodale Institute at its Anderson Campus in Bethlehem Township. SLUHN has also supported one of the region's longest-running employer-based Community Supported Agriculture (CSA) programs, connecting employees with fresh produce supplied by local farms. Since its inception, the program has returned more than \$2.2 million to participating farmers while increasing employee access to healthy food. Initiatives such as these demonstrate how healthcare institutions can support both community health and regional agriculture through innovative purchasing and partnership models. (*Buy Fresh Buy Local* 2026)

Similar partnerships are emerging throughout the region. In 2024, Rodale Institute and Phoebe Ministries launched the Phoebe Organic Farm at Founders Farm in Allentown, creating a new model that connects regenerative agriculture, healthy aging, local food sourcing, and community engagement through food production for senior living communities. (*Rodale Institute* 2026)

At the same time, much of the region's food system growth has been driven by nonprofit organizations, grant-funded programs, and individual initiatives rather than being fully integrated into broader regional planning, infrastructure, and economic development systems. While this approach has generated significant innovation and successful pilot projects, it has also contributed to fragmented implementation, uneven scaling, and vulnerability to changes in funding and organizational capacity. As interest in local food systems continues to grow, questions remain about how best to build upon these

successes, strengthen coordination, and create the infrastructure, partnerships, and market connections needed to support long-term impact.

Agriculture in the Lehigh Valley

Agriculture remains central to the Lehigh Valley's economy, landscape, and identity. In 2022, farms in Lehigh and Northampton Counties generated approximately \$156 million in agricultural sales while helping preserve open space, support rural economies, and provide locally produced food to regional markets. Despite ongoing development pressure and the loss of farmland, agriculture continues to be an important economic driver. Between 2017 and 2022, agricultural sales increased by 49 percent in Lehigh County and 7 percent in Northampton County, demonstrating the sector's continued resilience and adaptability. *(Buy Fresh Buy Local 2026)*

At the same time, the agricultural landscape is changing. Corn and soybeans account for approximately 56 percent of all farmland in production, while fruits and vegetables occupy a much smaller share of total acreage. In 2022, vegetable production accounted for approximately 1,831 acres and fruit orchards 1,024 acres. Although total crop sales reached \$113.2 million, farms producing fruits, vegetables, and berries generated just \$18.1 million in sales, representing approximately 16 percent of total crop revenue. The number of farms producing these crops has declined by roughly 50 percent since 1997, raising concerns about the long-term diversity and resilience of the regional food system. *(Buy Fresh Buy Local 2026)*

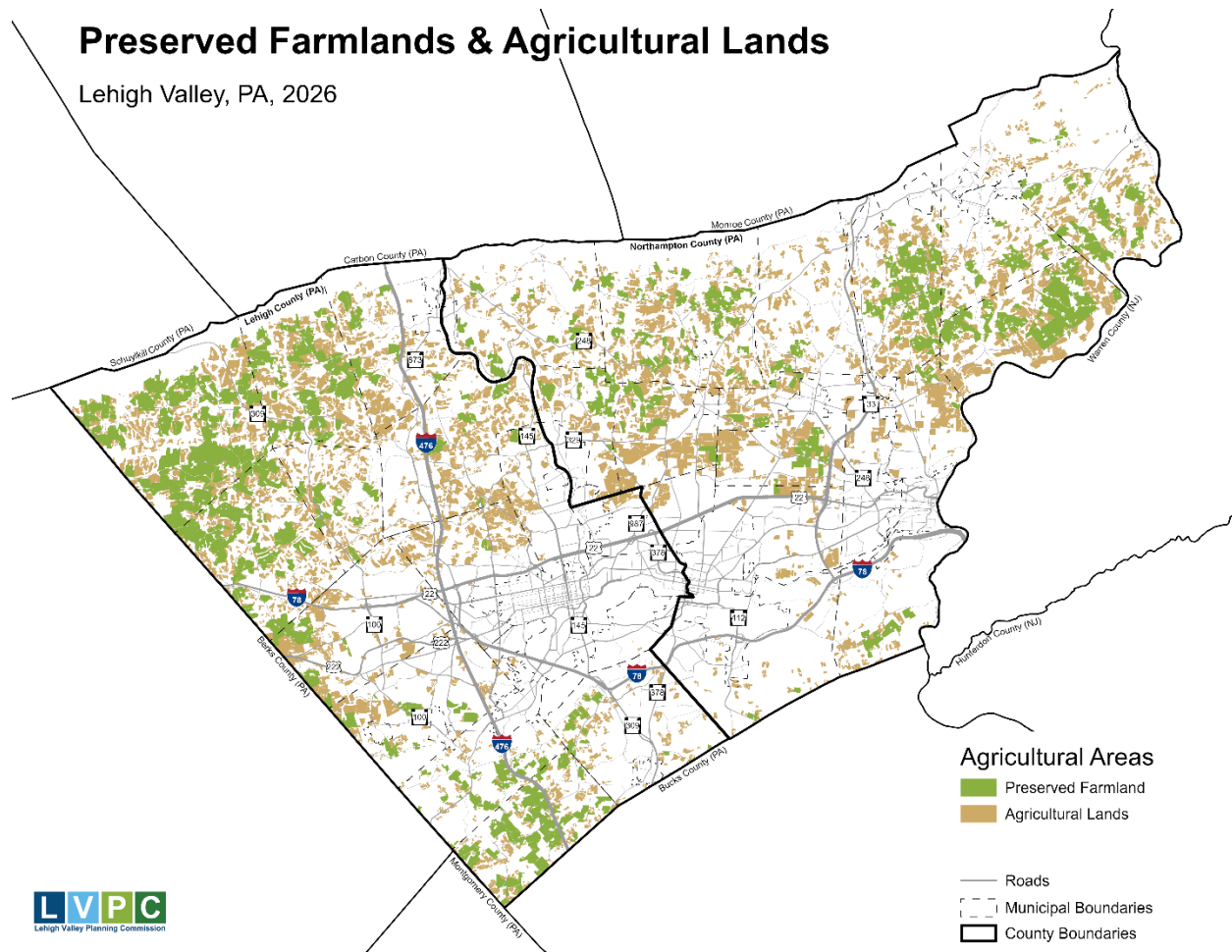
Despite these changes, the demand for local food continues to grow. Sales through local and regional food channels more than doubled between 2007 and 2022, increasing from approximately \$12 million to \$27 million. In 2022, 169 farms reported \$9.6 million in direct-to-consumer sales, while 46 farms generated \$17.1 million through intermediated market channels such as distributors, institutions, retailers and other farms throughout the region. These figures suggest that opportunities exist not only in direct marketing, but also in strengthening the infrastructure and market channels that connect producers with larger buyers. *(Buy Fresh Buy Local 2026)*

Yet farmers face significant challenges. Development pressure continues to reduce available farmland. Between 2015 and 2023, more than 44 million square feet of industrial and warehouse space were approved in Lehigh and Northampton Counties, while farmland acreage continued to decline. At the same time, farmland values have risen dramatically. In 2022, the average value of farmland nationwide was \$3,846 per acre, compared with \$9,928 per acre in Lehigh County and \$11,794 per acre in Northampton County. Farmers are also navigating labor shortages, rising production costs, healthcare concerns, and succession challenges. The average age of Lehigh Valley farmers is now 58, and more than one-third of farmers are over age 65. *(Buy Fresh Buy Local 2026)*

While agriculture remains an important part of the regional economy, profitability remains a challenge for many producers. According to the 2022 Census of Agriculture, just 45

percent of farm operators identified farming as their primary occupation. In Northampton County, average net cash farm income was approximately \$23,800 per producer annually, while Lehigh County averaged approximately \$52,000. These figures suggest that many farms rely on off-farm income and highlight the importance of expanding market opportunities, improving profitability, and creating value-added revenue streams that support long-term farm viability.

Figure 2. Farmland in the Lehigh Valley



These trends suggest that future agricultural growth is unlikely to come from expanding acreage alone. Instead, opportunities may lie in helping farmers generate greater value from the land already in production through season extension, value-added processing, high-density production systems, rotational grazing, agroforestry, organic production, and improved market access. Investments in infrastructure such as cold storage, aggregation, processing, and distribution may be particularly important as producers seek to meet growing demand for local food while operating within increasingly constrained land and labor markets.

The importance of agriculture extends beyond food production and farm income. Farmland provides a range of environmental and community benefits, including stormwater management, carbon sequestration, wildlife habitat, open space preservation, and improved air quality. These functions are especially valuable in a rapidly developing region facing increasing environmental pressures. In 2025, the American Lung Association assigned the Lehigh Valley an "F" grade for air quality and ranked the region as the 50th most polluted metropolitan area in the nation for daily particle pollution. Protecting and strengthening agricultural landscapes can therefore contribute not only to economic development and food security, but also to broader environmental and public health goals. (*Buy Fresh Buy Local* 2026)

1.2 Food Hub Feasibility and Regional Food System Opportunities

Interest in strengthening local food distribution is not new in the Lehigh Valley. Over the past decade, multiple studies and initiatives have identified both significant market opportunities for locally produced food and persistent barriers related to aggregation, distribution, and market coordination. A 2015 Buy Fresh Buy Local assessment of institutional wholesale markets found strong demand for locally produced food among schools, healthcare facilities, and other institutions, while a 2019 Buy Fresh Buy Local study exploring cooperative growing and marketing models demonstrated producer interest in collaborative approaches to accessing wholesale markets. Although the region's food system has continued to evolve since these studies were completed, many of the challenges they identified remain today.

In 2023, seven organizations—including the Bethlehem Area School District, Kellyn Foundation, Lehigh Valley Health Network, Penn State Extension, Rodale Institute, Bethlehem Food Co-op, and Second Harvest Food Bank—formed a collaborative initiative focused on strengthening food production, processing, distribution, and institutional purchasing throughout the Lehigh Valley. While the effort did not advance into a long-term implementation structure, it demonstrated broad regional recognition of the need for greater food system coordination and helped lay groundwork for many of the partnerships and conversations explored through this assessment. (*Buy Fresh Buy Local* 2026)

More recently, initiatives such as the Local Food Purchase Assistance (LFPA) program demonstrated the ability of regional producers to collectively supply large-scale food purchasing programs while expanding access to fresh, locally produced food. The program provided practical experience coordinating procurement, distribution, and producer participation across the region, demonstrating that many food hub functions can be successfully implemented through collaborative partnerships.

Regional interest in food system development was further reinforced through the Blue Zones Project Lehigh Valley engagement process. Beginning in 2024, more than 300 residents, community leaders, and stakeholders participated in interviews, focus groups, and community meetings to identify priorities related to health, food access, and

community well-being. Strengthening the regional food system emerged as a recurring theme, with development of a regional food hub and re-establishment of a Food Policy Council identified among the region's highest-priority strategies. These findings helped inform subsequent investments in food system planning, including this feasibility assessment and ongoing Food Policy Council development efforts. (*Blue Zones Lehigh Valley* 2024-25)

At the same time, producer surveys, stakeholder interviews, and findings from the Farm to Community report continue to point to challenges related to aggregation, distribution, infrastructure, and market access. Although demand for local food continues to grow, gaps remain in the systems needed to efficiently connect producers and buyers.

1.3 Study Purpose and Approach

This feasibility study builds upon *Farm to Community: The Lehigh Valley Food System* (2026), developed by Buy Fresh Buy Local–Greater Lehigh Valley. Drawing on producer surveys, stakeholder interviews, food hub case studies, asset mapping, and market research, the study evaluates the opportunities, challenges, and conditions necessary to support food hub functions and strengthen local food systems within the Greater Lehigh Valley.

Research Objectives

This study seeks to:

- Understand producer interest in participating in a food hub and identify factors that would influence involvement.
- Assess farm products, production capacity, seasonality, and growth potential.
- Identify barriers to accessing wholesale, institutional, retail, and other higher-volume markets.
- Evaluate infrastructure and service needs, including aggregation, storage, processing, transportation, and marketing support.
- Examine how food hub functions could complement existing food system assets and initiatives.
- Explore opportunities to strengthen connections between producers, buyers, and community food access efforts.
- Assess the conditions necessary for successful and sustainable food hub development.
- Provide information to guide future planning, partnerships, and investments that support local agriculture and expand access to locally produced food.

1.4 Study Area

The primary focus area for this feasibility study is Lehigh and Northampton Counties, which together comprise the core of the Lehigh Valley. Home to nearly 700,000 residents, the region includes a diverse mix of urban centers, suburban communities, and productive

agricultural landscapes that support a vibrant and evolving local food system. Because Buy Fresh Buy Local–Greater Lehigh Valley primarily serves these two counties, the findings and recommendations presented in this report focus on opportunities to strengthen food production, distribution, and market access within the Lehigh Valley.

At the same time, food systems do not operate according to county boundaries. To better understand the opportunities and challenges associated with a regional food hub, this study also considers a broader foodshed that includes Berks, Carbon, Monroe, Montgomery, Schuylkill, and Wayne Counties in Pennsylvania, as well as Hunterdon and Warren Counties in New Jersey. Many of the producers, processors, distributors, and institutional buyers represented in this study operate across this larger geography, and several stakeholders maintain sourcing, processing, and purchasing relationships that cross state lines. This broader foodshed also informs the economic impact modeling used later in the report.

1.5 Methodology

This feasibility study utilized multiple research methods to better understand the opportunities, challenges, and potential impacts associated with developing a food hub in the Lehigh Valley. Building upon findings from *Farm to Community*, the study combines producer surveys, stakeholder interviews, food hub case studies, geographic analysis, and economic impact modeling to assess both the practical feasibility and potential economic benefits of a regional food hub.

Producer Surveys

This feasibility study builds upon a series of producer surveys conducted between April 2025 and January 2026. These surveys were designed to better understand the opportunities and challenges facing Lehigh Valley farmers and provided valuable insight into farm operations, production capacity, market channels, infrastructure needs, season extension practices, labor challenges, and producer interest in participating in a regional food hub.

The surveys included

- *Lehigh Valley Farmer Survey: Understanding Farming Operations and Challenges* (April 2025)
 - Number of respondents: 66
 - Survey format: 31 questions, combination of closed-ended and open-ended, administered through a SurveyMonkey form
 - Distribution method(s): Individual outreach to farmers, Buy Fresh Buy Local–Greater Lehigh Valley social media and newsletter
 - Topics addressed: land ownership and preservation, scale of farm operations, farming practices and certifications, products grown/raised, market channels, challenges, excess product

- *Lehigh Valley Farmer Season Extension Survey* (July 2025)
 - Number of respondents: 15
 - Survey format: 14 questions, combination of closed-ended and open-ended, administered through a SurveyMonkey form
 - Distribution method(s): Individual outreach to farmers, Buy Fresh Buy Local-Greater Lehigh Valley social media and newsletter
 - Topics addressed: use of season extension tools and methods
- *Lehigh Valley Food Hub Feasibility Study: Producer Survey* (January 2026)
 - Number of respondents: 27
 - Survey format: 32 questions, combination of closed-ended and open-ended, administered through a SurveyMonkey form
 - Distribution method(s): Individual outreach to farmers, Buy Fresh Buy Local-Greater Lehigh Valley social media and newsletter
 - Topics addressed: products grown/raised, product volumes, market channels, excess product, transportation/distribution capabilities, season extension, farming practices/certifications, washing facilities, storage facilities, interest in selling to food hub, preferences for food hub operations and services, challenges/barriers

Together, these surveys helped inform the feasibility analysis by providing a deeper understanding of producer needs, existing capacities, and opportunities to strengthen regional food distribution systems.

Stakeholder and Food Hub Interviews

Semi-structured interviews were conducted with agricultural producers, institutional buyers, food system organizations, public sector representatives, and other key stakeholders. A table detailing all interviews and meetings conducted as part of the study can be found in Appendix B. These conversations provided valuable insight into market opportunities, infrastructure needs, operational considerations, and barriers to strengthening regional food distribution systems.

To better understand successful food hub practices and common challenges, additional interviews were conducted with established food hubs serving regions with similar agricultural and market characteristics. These interviews provided perspective on governance structures, operational models, infrastructure requirements, financing strategies, and lessons learned.

Asset Mapping

A geographic analysis was conducted to identify and evaluate key food system assets throughout the study area. This analysis included farms, institutional buyers, aggregation and distribution facilities, processing infrastructure, cold storage, transportation and other resources relevant to food hub operations. Mapping these assets helped identify geographic opportunities, infrastructure gaps, and potential efficiencies within the regional food system.

Economic Impact Analysis

Economic impacts were estimated using IMPLAN economic modeling software and a Multi-Regional Input-Output (MRIO) framework. Because agricultural supply chains and food distribution networks extend beyond county boundaries, the MRIO approach was used to capture economic relationships throughout the broader regional foodshed. The analysis evaluated the potential economic impacts of a centralized food hub designed to serve the Lehigh Valley and surrounding foodshed. Model assumptions were informed by producer surveys, stakeholder interviews, operational benchmarks from USDA and Wallace Center food hub studies, LFPA purchasing data provided by Second Harvest Food Bank, and operational data from comparable food hubs. Economic modeling was used to estimate the potential impacts of food hub operations on employment, labor income, business activity, and regional economic output.

CHAPTER 2. PRODUCER CHARACTERISTICS, CAPACITY, AND MARKET READINESS

The success of any food hub depends first and foremost on the producers it serves. To better understand the capacity, needs, and interests of regional farms, this study examined findings from the Lehigh Valley Food Hub Feasibility Study Producer Survey, stakeholder interviews, LFPA purchasing records, and previous research conducted throughout the region.

Collectively, these findings paint a picture of a diverse and capable agricultural sector with significant production capacity, considerable wholesale experience, and strong interest in expanding access to larger markets. Producers represented a wide range of farm sizes, production systems, and market channels, reflecting the diversity that characterizes agriculture throughout the Lehigh Valley and surrounding foodshed.

At the same time, producers face persistent challenges related to labor, infrastructure, profitability, land access, and market development. These challenges often limit the ability of farms to scale production, pursue new market opportunities, and participate in larger institutional and wholesale markets.

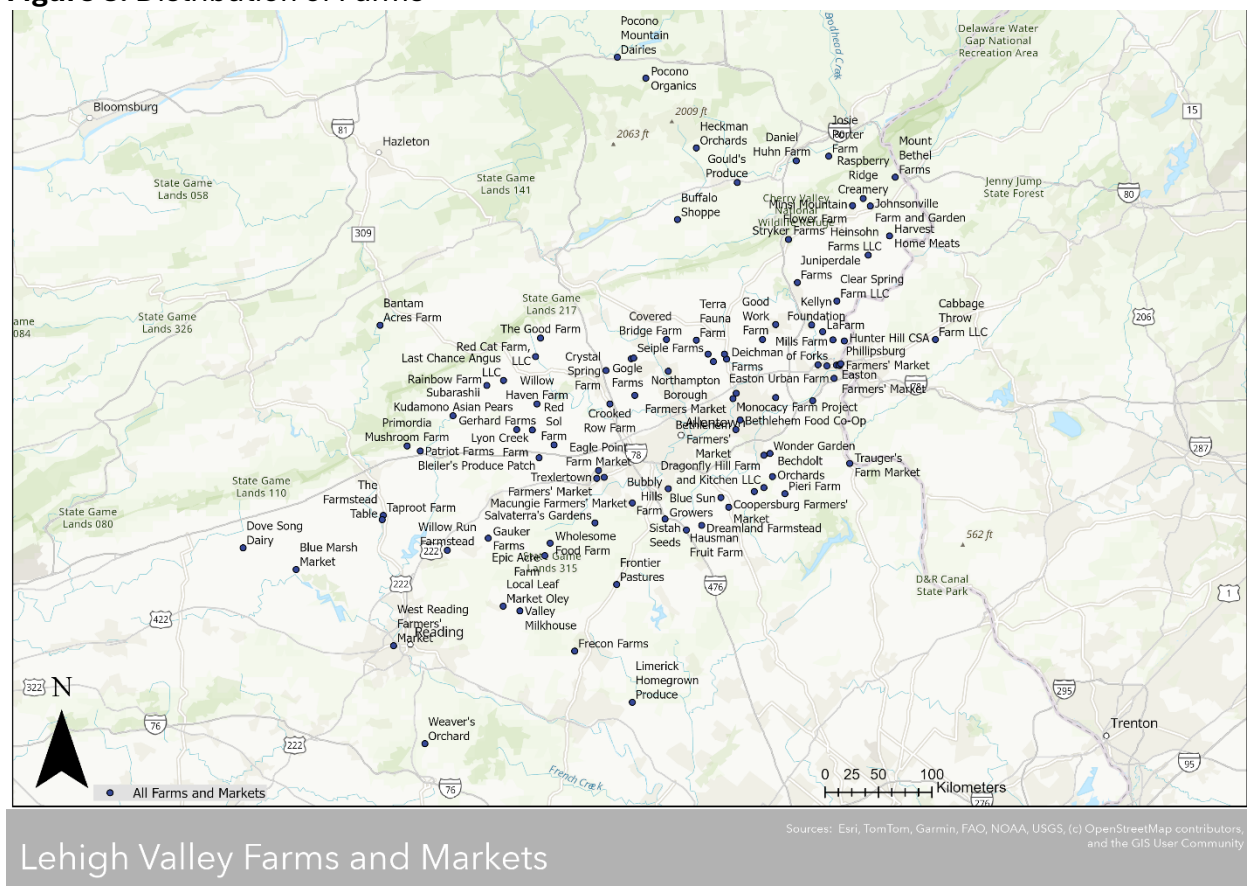
Importantly, the findings suggest that producers are not resistant to collaboration. Rather, many are actively seeking opportunities to access larger buyers, participate in coordinated distribution systems, and reduce the logistical burdens associated with marketing and sales. This distinction is critical. The question emerging from the producer survey is not whether farms are interested in expanded market opportunities, but what systems, infrastructure, and services are needed to help them succeed.

2.1 Geographic Distribution of Producers

Survey respondents were distributed throughout the Lehigh Valley and broader regional foodshed, including Lehigh, Northampton, Berks, Carbon, Monroe, Wayne, and neighboring New Jersey counties. While the study focuses on the Lehigh Valley, the geographic distribution of participating farms reflects the interconnected nature of the regional food economy. Agricultural production, processing facilities, distribution networks, and institutional buyers frequently operate across county and state boundaries, creating a regional foodshed that extends well beyond traditional jurisdictional lines.

The distribution of farms throughout both eastern and western portions of the Lehigh Valley highlights one of the region's greatest strengths: proximity. Producers are located near population centers, schools, hospitals, colleges and universities, food banks, and other potential buyers. Compared to many rural regions, transportation distances between farms and markets are relatively short.

Figure 3. Distribution of Farms



At the same time, the dispersed nature of agricultural production presents logistical challenges. While individual farms may possess sufficient production capacity, many lack efficient mechanisms for aggregation, storage, transportation, and distribution. These geographic realities reinforce the importance of coordinated infrastructure and market development strategies.

2.2 Agricultural Diversity and Production Capacity

Survey respondents represented a broad range of agricultural operations, including vegetable growers, fruit and orchard operations, mushroom producers, dairy farms, livestock operations, flower farms, vineyards, nurseries, and diversified farms producing multiple product categories.

The diversity of products represented in the survey suggests that the region has the capacity to serve a wide variety of markets, including direct-to-consumer sales, restaurants, institutions, food assistance programs, and wholesale distribution channels. Rather than relying on a small number of dominant commodities, the regional food system

benefits from a broad portfolio of agricultural products capable of supporting multiple market sectors.

Many respondents reported utilizing organic, regenerative, conservation-oriented, integrated pest management, or other sustainable production practices. Producers also reported holding certifications including USDA Organic, Certified Naturally Grown, Real Organic Project, Animal Welfare Approved, and other third-party standards. While sustainable production practices were common among respondents, participation in formal food safety and market-access certifications such as Food Safety Modernization Act (FSMA) and Good Agricultural Practices (GAP), were low. This distinction is important because most institutional and wholesale buyers require certifications, food safety documentation, liability insurance, and traceability systems that extend beyond production practices alone.

The findings suggest that many farms are already employing production methods aligned with growing consumer demand for sustainably produced food. However, expanding institutional procurement may require additional support to help producers navigate certification requirements, food safety compliance, insurance requirements, and other market-readiness expectations.

One potential opportunity identified through this assessment is the provision of GAP training, technical assistance, or GroupGAP certification support through a food hub or partner organization. USDA's GroupGAP program allows multiple farms to work under a shared food safety management system, reducing costs and administrative burdens while helping producers meet buyer requirements. Many food hubs across the country have successfully used GroupGAP and food safety training programs to prepare producers for wholesale and institutional markets.

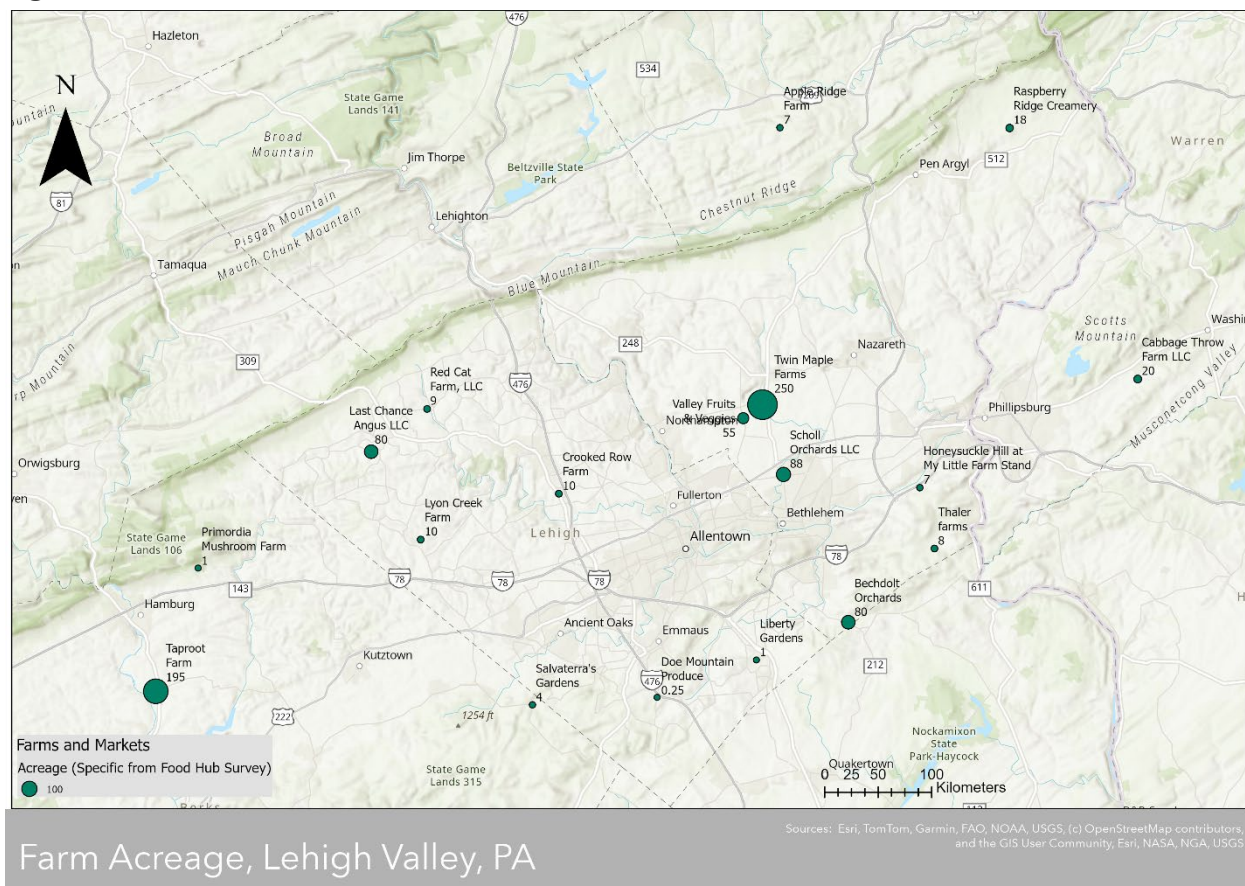
2.3 Farm Scale and Business Challenges

While production capacity exists throughout the region, producers identified several challenges that limit their ability to expand operations and access larger markets.

Land access emerged as a recurring concern. Producers cited rising land values, development pressure, lease insecurity, and competition for agricultural land as barriers to long-term growth.

Labor shortages also emerged as a significant challenge. Producers described difficulties recruiting and retaining workers, particularly during peak growing and harvest seasons. Rising labor costs, workforce shortages, and the increasing complexity of farm management place additional pressure on businesses already operating within narrow margins.

Figure 4. Farm Size

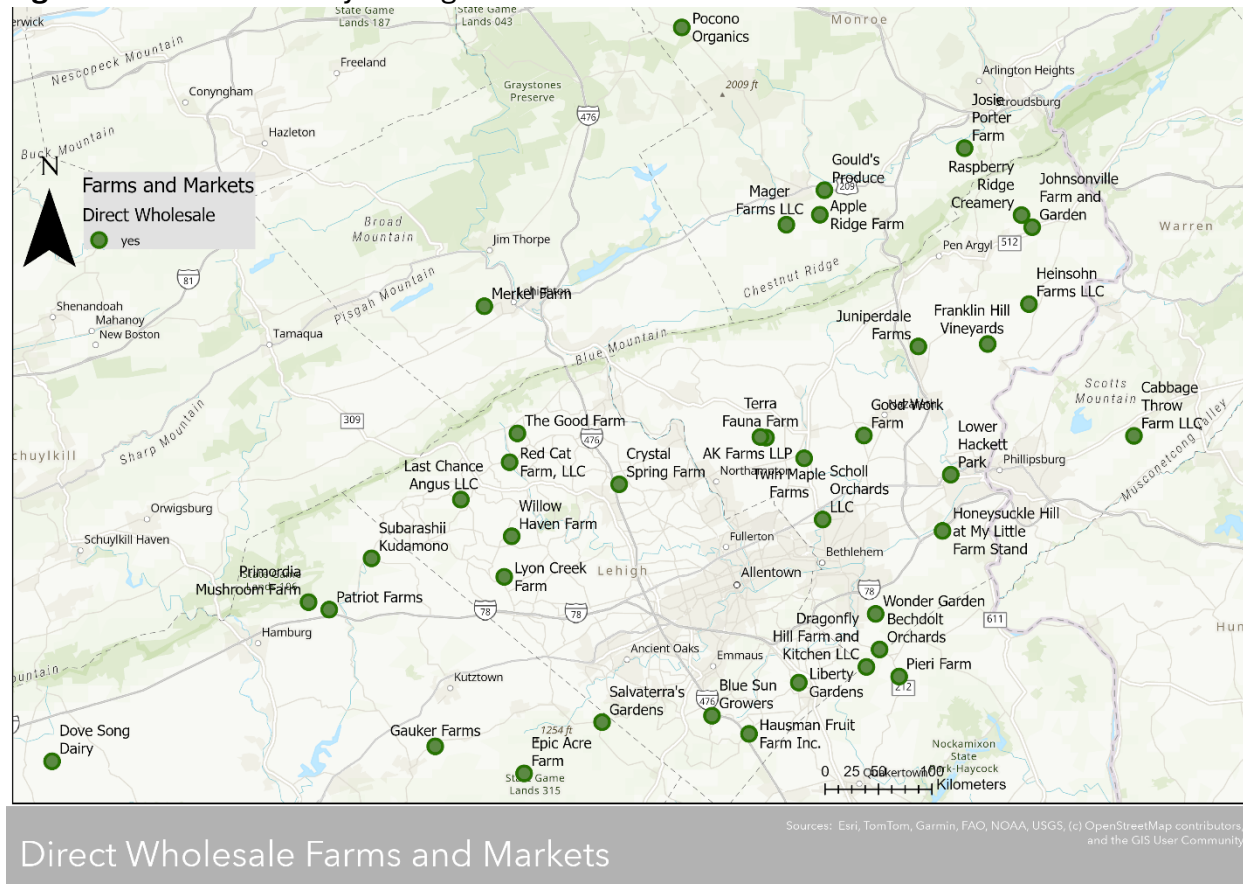


Survey respondents further identified time and management capacity, infrastructure and equipment needs, profitability concerns, market access limitations, and funding uncertainty as barriers to growth. These findings suggest that many farms are operating near capacity and will likely require additional support, infrastructure, or coordination mechanisms to expand into larger markets.

2.4 Existing Wholesale Experience and Market Readiness

Contrary to assumptions that local farms primarily serve direct-to-consumer markets, survey results and purchasing records indicate substantial wholesale experience throughout the region. Many respondents reported selling through a mix of market channels, including wholesale distributors, restaurants, schools, grocery stores, food hubs, and institutional buyers. Several farms also reported experience meeting requirements commonly associated with wholesale markets, including product grading, packaging specifications, food safety documentation, delivery scheduling, and invoicing systems. These findings suggest that a significant portion of the region's producer base already possesses skills and experience relevant to larger-scale market participation, providing a strong foundation for future expansion.

Figure 5. Farms Currently Selling Wholesale



Producer interviews also highlighted the challenges associated with maintaining access to wholesale markets as buyer requirements evolve. One producer reported losing access to two longstanding supermarket accounts after food safety requirements were expanded to include certification of harvest and packing operations as well as refrigerated transportation. The loss represented a significant financial setback for the farm and illustrates how wholesale market requirements can change over time, even within established buyer relationships. Increasingly, major retailers require suppliers to obtain food safety certifications that extend beyond field-level GAP standards and include audited packing, cooling, storage, and handling facilities. While these requirements help ensure food safety and traceability throughout the supply chain, they also create significant infrastructure and compliance challenges for smaller producers. These findings reinforce the importance of technical assistance, certification support, and strategic investments that help farms meet evolving market expectations and retain access to valuable wholesale markets.

Figure 6. Wholesale Outlets



Participation in the USDA Local Food Purchase Assistance (LFPA) Program provides particularly strong evidence of regional market readiness. Between February 2023 and March 2025, more than forty farms generated approximately \$1.9 million in sales through a coordinated procurement network serving food assistance organizations throughout the region. Collectively, participating farms supplied approximately 2.15 million pounds of food—equivalent to an estimated 1.8 million meals—while successfully navigating procurement requirements, quality standards, invoicing systems, and delivery logistics. (*Second Harvest 2022-25*)

Participating farms supplied fresh produce, dairy products, eggs, meat, and other locally produced foods through a distribution network that reached 146 community organizations. Notably, 44 agencies received direct deliveries from participating farms, demonstrating the feasibility of procurement models that rely on coordination and administration rather than centralized warehousing alone. The program connected food access organizations with products sourced from approximately 40 small and mid-sized farms, many of which were beginning or historically underserved producers. (*Second Harvest 2022-25*)

The largest participating farms supplied substantial volumes of staple crops including apples, potatoes, pears, cabbage, sweet potatoes, peaches, sweet corn, onions, tomatoes, and pumpkins, demonstrating that regional producers are capable of meeting significant purchasing demand when reliable buyers and logistical support are available. Beyond total sales, producers frequently described LFPA as an important outlet for surplus production and a source of market stability that supported production planning, equipment investments, business growth, and reduced food waste. (*Second Harvest 2025*) LFPA participation was concentrated among farms located throughout the broader Lehigh Valley foodshed, demonstrating that significant production capacity exists across multiple counties. While participation levels varied, Northampton and Monroe Counties accounted

for the largest share of sales, together representing more than \$1.6 million in procurement over the life of the program. (*Second Harvest 2025*)

Figure 7. LFPA Farm Participation and Sales by County (2023-2025) (*Second Harvest 2025*)

County	Number of Participating Farms	Total Sales
Northampton	11	\$872,101
Monroe	8	\$733,719
Lehigh	4	\$221,947
Wayne	10	\$214,653
Bucks	3	\$86,021
Berks	2	\$59,808
Total	38	\$2,188,250

These figures demonstrate that substantial purchasing volume can be generated through coordinated procurement efforts and highlight the concentration of production capacity among a relatively small number of farms capable of supplying significant quantities of food when reliable markets and administrative support are available.

The LFPA experience suggests that production capacity may not be the primary limiting factor in expanding local food markets. Rather, the greater constraints appear to be coordination, market access, and procurement systems capable of connecting existing farm production with existing demand.

2.5 Producer Interest in Food Hub Participation

Survey findings indicate strong producer interest in collaborative marketing approaches that improve access to larger and more stable markets. Approximately 71 percent of respondents reported being very or extremely interested in selling through a food hub, while nearly 94 percent expressed at least some level of interest. These findings suggest that producer interest is unlikely to be a significant barrier to future food hub development. Producers also demonstrated a strong willingness to participate in collaborative sales and aggregation models. Nearly 88 percent of respondents agreed or strongly agreed that they would be willing to market products alongside other producers if doing so resulted in larger orders and expanded market opportunities. Historically, concerns about competition, branding, and loss of farm identity have been cited as barriers to aggregation efforts. However, survey results suggest that these concerns may be less significant than

commonly assumed. Most respondents expressed limited concern about losing farm identity or competing with a food hub for direct-to-consumer sales.

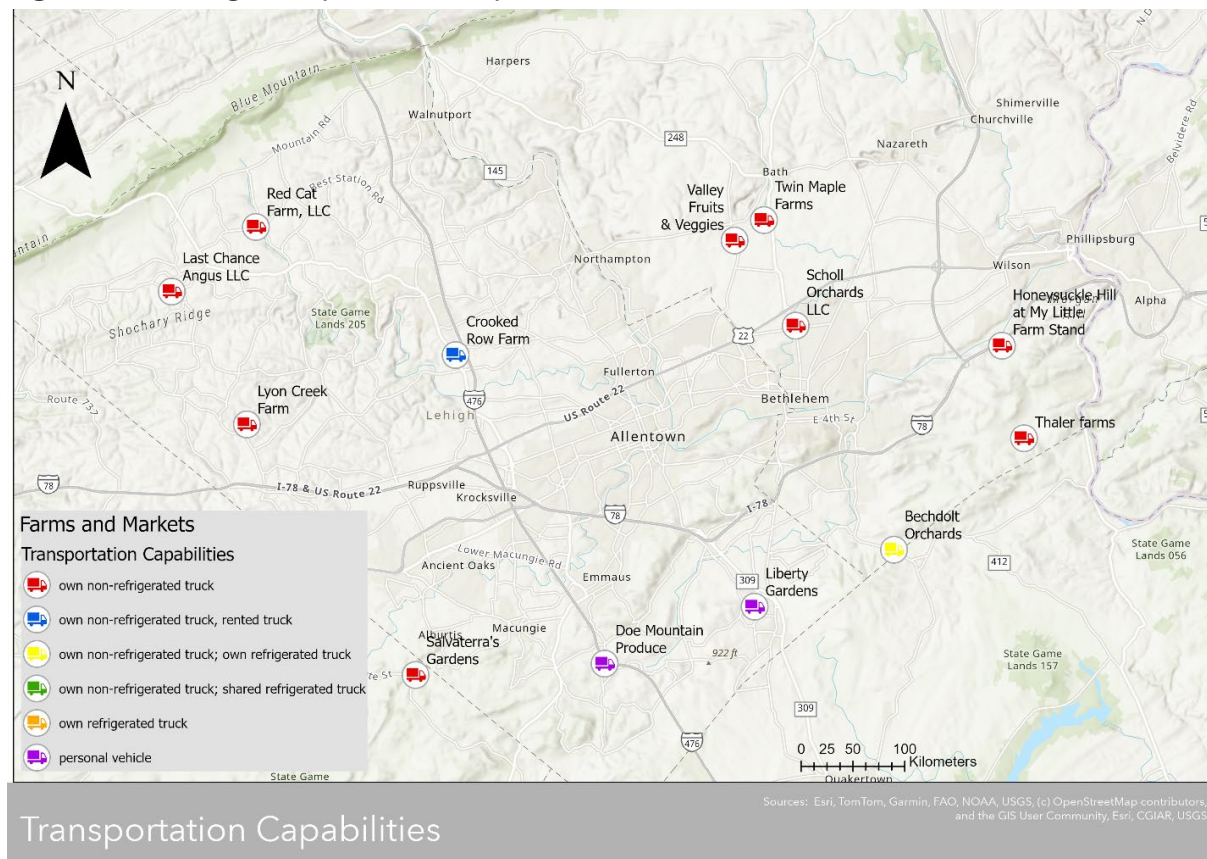
Instead, producers consistently emphasized the practical benefits of collaboration, including access to larger buyers, reduced marketing burdens, improved operational efficiency, and more reliable sales opportunities. Producers also identified competitive pricing, streamlined logistics, reliable market access, and other services that support long-term profitability as important factors influencing participation. These findings suggest that future food hub efforts should focus less on recruiting producers and more on creating systems that deliver competitive pricing, reliable market access, and operational efficiencies that improve farm profitability.

2.6 Existing Assets and Remaining Infrastructure Needs

A food hub's success depends not only on what farms produce but also on the infrastructure already present within the regional food system. Survey findings indicate that many producers possess assets that could support expanded institutional sales. These assets include refrigerated storage, delivery vehicles, wash and pack facilities, season extension structures, food safety certifications, and existing wholesale relationships.

While most respondents reported access to transportation, refrigerated distribution capacity was less common, highlighting a potential opportunity for shared logistics services. Transportation capacity represents only one component of producer readiness. Mapping conducted as part of this assessment identified a variety of existing infrastructure assets—including cold storage, processing facilities, aggregation points, distribution resources, and other food system assets—that may support future food hub functions. These findings suggest that future food hub efforts may be able to build upon and coordinate existing infrastructure rather than relying entirely on new capital investments.

Figure 8. Existing Transportation Capabilities



The presence of these assets is significant because it suggests that portions of the infrastructure needed to support expanded local food distribution already exist within the region. While additional investments may be necessary, future food hub efforts may benefit from leveraging and coordinating existing infrastructure rather than duplicating assets already in place.

Food safety readiness is crucial. Most institutional buyers, distributors, and food service providers frequently require GAP certification, food safety plans, liability insurance, and other documentation before purchasing products. Farms that already maintain these certifications and practices represent an important foundation for future institutional procurement efforts.

Similarly, farms with delivery capacity, refrigerated storage, and wash and pack infrastructure may be particularly well positioned to participate in pilot projects and early-stage food hub activities. These farms already possess many of the operational capabilities needed to serve larger buyers and could help demonstrate the viability of expanded regional distribution systems.

Figure 9. Farms Currently Selling Wholesale, Farms with Existing GAP Certification

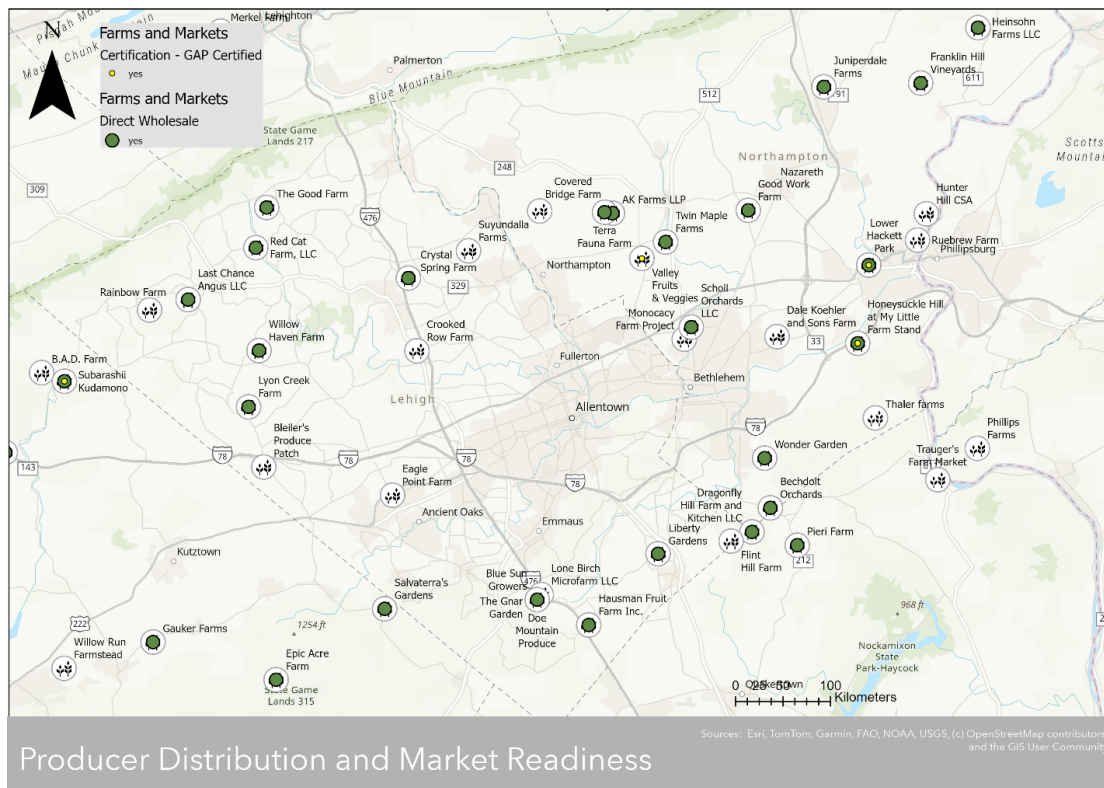
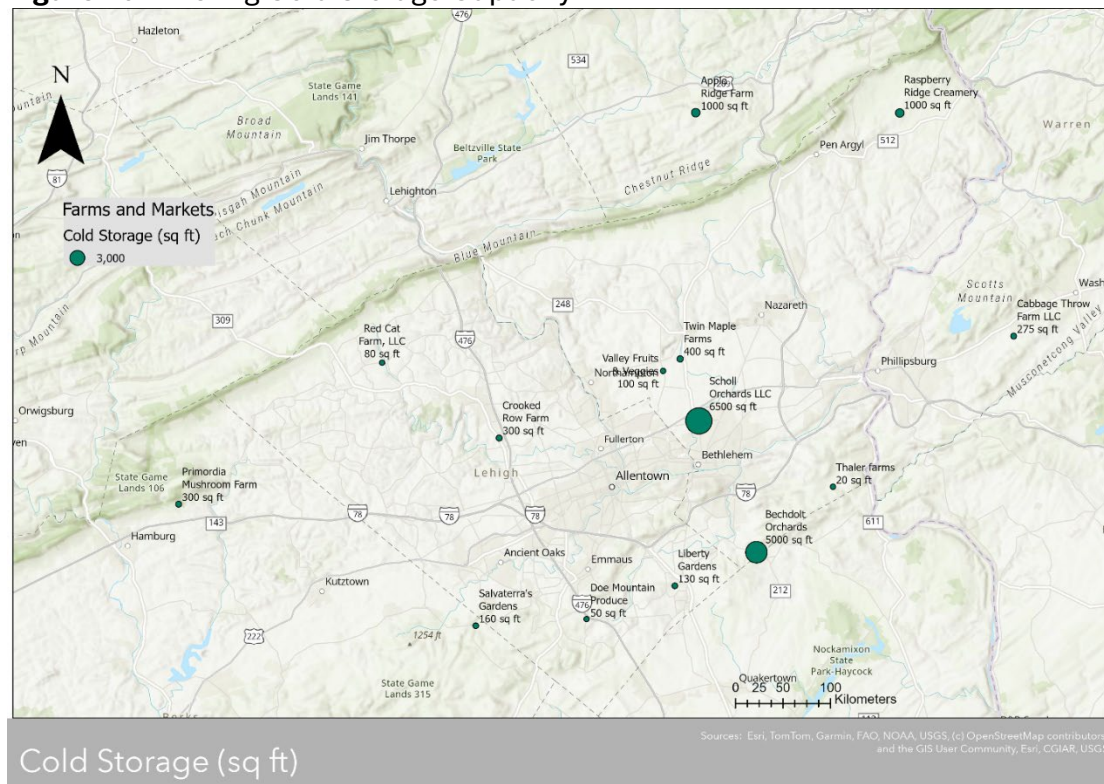
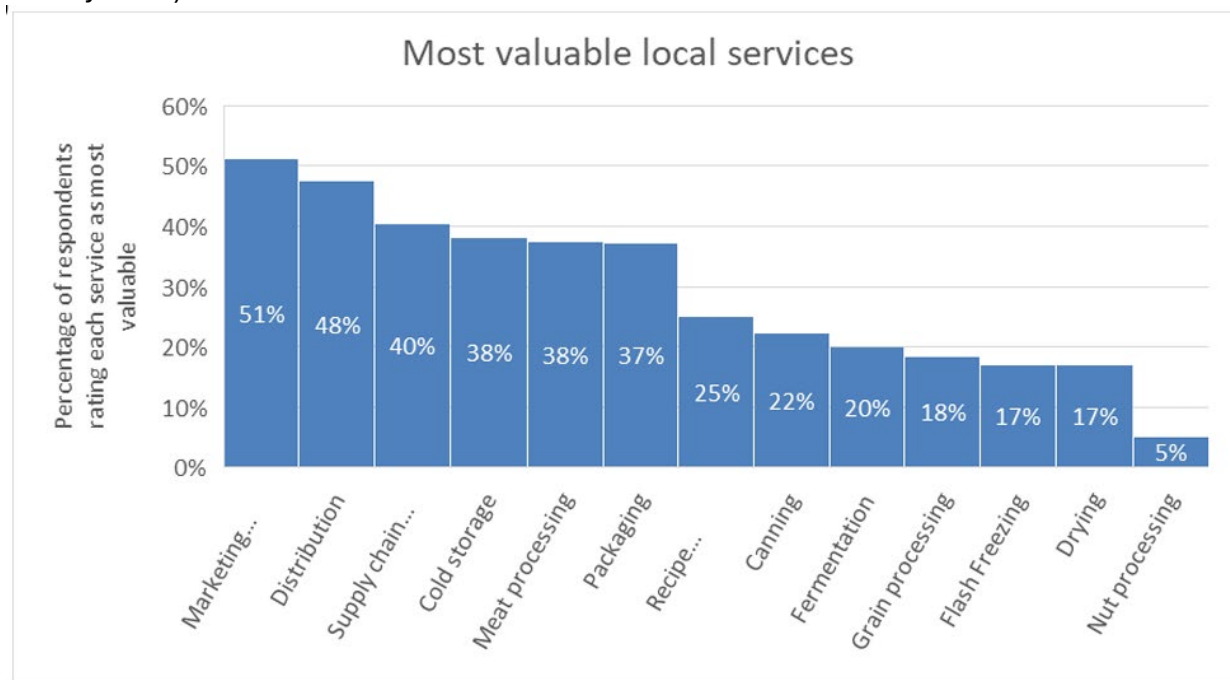


Figure 10. Existing Cold Storage Capacity



While many producers possess important infrastructure assets, survey findings also identified clear gaps that limit growth and market participation. When asked which services they would utilize through a food hub, producers most frequently identified packaging services, supply chain access, cold storage, and canning. Additional respondents expressed interest in flash freezing, aggregation support, distribution services, and processing opportunities.

Figure 11. Services Identified as Most Valuable by Local Producers (Lehigh Valley Grower Survey 2025)



These findings suggest that many producers are not simply looking for additional sales outlets—they are looking for practical solutions that help them access larger markets while reducing logistical burdens. Packaging, cold storage, transportation support, aggregation, and market coordination were consistently identified as priorities, indicating that many of the challenges producers face occur after products leave the farm.

Producer interest in canning, freezing, packaging, and other value-added services also points to opportunities beyond traditional fresh-market sales. These services can help farms reduce waste, extend product availability, access new markets, and capture more value from existing production.

2.7 Producer Readiness Assessment

Taken together, survey findings indicate that the Lehigh Valley foodshed possesses a strong foundation for expanded local food distribution. Producers demonstrated substantial

production capacity, existing wholesale experience, and significant interest in collaborative market opportunities.

Many producers appear willing to participate in aggregation and coordinated marketing efforts if those efforts create access to larger and more stable markets. Concerns about farm identity and competition were generally outweighed by interest in improving market access, reducing logistical burdens, and increasing sales opportunities. At the same time, readiness is not uniform across the producer community. Some farms already possess the certifications, infrastructure, delivery capacity, and production volume needed to serve institutional and wholesale markets. Others may require technical assistance, infrastructure investments, crop planning support, or phased participation opportunities before they can reliably serve larger buyers.

Survey respondents were also asked which factors would most influence their willingness to participate in a regional food hub. Competitive pricing emerged as the most frequently selected response, followed by streamlined ordering and invoicing systems, convenient pickup or delivery locations, and advance purchasing commitments. While producers expressed strong interest in food hub participation, these findings suggest that economic viability remains a primary consideration. Any future food hub model will need to deliver clear value to participating farms while supporting long-term profitability.

Overall, the findings suggest that future food hub development should focus less on convincing producers to participate and more on creating systems that provide tangible value. Producers are seeking practical solutions to challenges related to infrastructure, logistics, processing, and market access. The success of any future food hub or regional food system initiative will ultimately depend on its ability to address those needs while creating new opportunities for farms to grow and thrive.

CHAPTER 3. MARKET DEMAND and BUYER REQUIREMENTS

While Chapter 2 demonstrated that substantial producer capacity exists throughout the Lehigh Valley foodshed, food hub feasibility ultimately depends on the presence of sustainable markets capable of absorbing additional production. Understanding buyer demand, procurement requirements, and market opportunities is therefore essential to evaluating whether a regional food hub could succeed.

Findings from stakeholder interviews, buyer surveys, previous market studies, and recent procurement initiatives indicate that significant demand exists for locally and regionally produced food throughout the Lehigh Valley. However, the findings also suggest that demand alone is insufficient. Producers and buyers often operate within different systems, each with distinct expectations, requirements, and constraints.

Throughout this study, buyers consistently expressed interest in purchasing more locally produced food. Yet they also emphasized the importance of pricing, consistency, food safety, processing, packaging, and reliable delivery. In many cases, the challenge was not a lack of demand, but the absence of systems capable of translating that demand into practical purchasing relationships.

The findings presented in this chapter suggest that the greatest opportunities may not lie in simply moving more raw agricultural products. Rather, opportunities appear strongest where aggregation, processing, product development, and procurement coordination can help bridge the gap between producer capacity and buyer needs.

3.1 Institutional Purchasing Opportunities (Demand Exists)

Institutions represent one of the largest opportunities for expanding local food sales throughout the Greater Lehigh Valley. The region is home to major healthcare systems employing more than 64,000 people, nine colleges and universities, 18 public school districts, more than 80 senior living communities, food assistance organizations, and other institutions that collectively purchase substantial quantities of food each year. (*Buy Fresh Buy Local* 2026)

Previous research has consistently identified institutional procurement as a significant market opportunity. In 2015, Buy Fresh Buy Local–Greater Lehigh Valley estimated that colleges, universities, healthcare facilities, and other institutions represented approximately \$2.2 million to \$3 million in annual demand for locally produced fruits and vegetables, equivalent to an estimated 3.2 to 3.9 million pounds of produce annually. While purchasing practices have evolved since that study was completed, stakeholder interviews conducted for this feasibility assessment suggest that institutional interest in local food has continued to grow. Increasing attention to sustainability, food access,

community health, and regional economic development has encouraged many institutions to explore opportunities for expanding local procurement.

Healthcare systems represent a particularly important opportunity. The Lehigh Valley is served by major healthcare networks including St. Luke's University Health Network and Jefferson Health–Lehigh Valley. Both organizations have demonstrated interest in local food systems, community health initiatives, and regional food access efforts. Statewide initiatives such as *Good Food, Healthy Hospitals* have further encouraged healthcare institutions to incorporate local purchasing into broader sustainability and wellness strategies. (*Buy Fresh Buy Local* 2026)

Educational institutions also represent important market opportunities. Public school districts, colleges, and universities collectively serve thousands of meals each day while increasingly exploring farm-to-school and local sourcing initiatives. Lehigh University reported sourcing approximately 10 percent of its food locally and expressed interest in expanding local purchasing as part of broader sustainability goals.

Interviews with Pomptonian Food Service, Metz Culinary Management, and Sysco further suggest that demand for local food extends well beyond individual institutions.

Pomptonian, which serves approximately 450–500 schools in New Jersey, reported that local products currently account for approximately 10–20 percent of purchases but expressed a desire to increase local sourcing where reliable products and supply chains exist. They indicated they are looking for new purchasing sources.

Metz Culinary Management, which serves over 15,000 individuals through schools, healthcare facilities, senior living communities, colleges, and restaurants in the region, similarly identified opportunities to expand local procurement and expressed interest in exploring pilot projects with regional partners.

Interviews with **Sysco**, one of the world's largest food service distributors, suggest that existing wholesale distribution channels may also be more receptive to local products than commonly assumed. Representatives indicated that local sourcing remains an area of interest and noted that regional distribution centers retain some flexibility to add products to their catalogs when demand exists and operational requirements can be met. Sysco also identified ongoing supply challenges for leafy greens and certain vegetables sourced from western production regions, suggesting potential opportunities for regional growers utilizing season-extension and controlled-environment production systems.

While price remains an important consideration, representatives noted that many chefs and food service operators are willing to pay premiums for products perceived as unique, high quality, or locally differentiated. This suggests that opportunities may exist for regional producers who can compete on quality, freshness, and product differentiation rather than price alone.

Additional opportunities may exist within the region's self-operated school districts, which retain direct control over food purchasing decisions. Previous Farm to School work

identified more than a dozen districts participating in a regional purchasing consortium, creating a potential pathway for coordinated local procurement. The opportunity is substantial: less than 20 percent of Pennsylvania's \$729 million annual school food budget is currently spent on locally sourced food. (*Buy Fresh Buy Local* 2026)

Additional evidence of institutional demand can be found in the Pennsylvania Beef to Pennsylvania Schools program, which connected more than 120 school districts with Pennsylvania cattle producers during the 2024–2025 school year. The program sourced over 133,000 pounds of Pennsylvania beef and demonstrated that coordinated procurement models can successfully connect local producers with large institutional buyers. The initiative also highlights opportunities to expand local sourcing beyond produce into higher-value protein markets. (*Buy Fresh Buy Local* 2026)

Collectively, these findings suggest that significant demand for local products already exists across institutional and wholesale markets. The opportunity may be less about creating demand and more about helping producers and processors access markets that are already seeking local products.

3.2 Buyer Requirements & Market Readiness (What do buyers need?)

One of the clearest findings to emerge from this study is that the barriers to expanding local procurement are often operational rather than philosophical. Buyers consistently expressed interest in purchasing more locally produced food, but emphasized the need for reliable supply, food safety compliance, appropriate packaging, and other requirements necessary to support day-to-day operations.

Across interviews, schools, healthcare facilities, distributors, and food service providers identified a common set of factors influencing purchasing decisions. While the relative importance of these factors varied by buyer and product category, the following themes emerged repeatedly:

- Competitive pricing
- Reliable supply
- Consistent quality
- Food safety compliance
- Product standardization
- Appropriate packaging
- Delivery logistics
- Year-round availability

A survey completed by Metz Culinary Management identified cost, seasonality, consistency of supply, insufficient volume, and food safety requirements as the primary barriers to purchasing more locally produced food. Similarly, Lehigh University identified

product availability and volume consistency as key constraints to expanding local procurement.

Interviews with Sysco revealed many of the same themes. While representatives expressed interest in sourcing additional local products, they emphasized the importance of forecasting, packaging, traceability, delivery logistics, and supplier reliability. These requirements are not unique to Sysco and were echoed by multiple buyers throughout the assessment.

These buyer requirements were not always reflected in current farm practices. The producer survey found that while sustainable production practices were common among respondents, participation in formal food safety and market-access certifications such as GAP varied considerably. This distinction is important because most institutional and wholesale buyers require certifications, food safety documentation, liability insurance, and traceability systems as conditions of purchase. Opportunities to provide GAP training, technical assistance, or GroupGAP certification support may help more producers access higher-volume markets while reducing the cost and administrative burden associated with certification.

These findings suggest that buyer demand already exists. The challenge is not generating interest in local food, but ensuring that producers have the capacity, certifications, infrastructure, and operational systems needed to meet buyer expectations consistently and at scale.

3.3 LFPA: Evidence that Coordinated Procurement Works

The USDA Local Food Purchase Assistance (LFPA) Program provides perhaps the strongest local example of how coordinated procurement systems can connect producers and buyers at scale. As discussed previously, the program directed significant funding to local farms while distributing locally produced food through a network of community organizations across the region.

Beyond its economic impact, LFPA demonstrated the practical feasibility of many functions commonly associated with food hubs, including procurement coordination, buyer outreach, quality control, logistics management, invoicing, and payment processing. Stakeholders repeatedly pointed to the program as evidence that coordinated purchasing systems can work when sufficient administrative and logistical support is available. The program also demonstrated that food hub functions do not necessarily require a centralized facility. While some products moved through warehouse-based distribution, many transactions occurred through direct producer-to-agency relationships supported by centralized coordination and administration. In these cases, producers delivered directly to food pantries and community organizations while program staff managed procurement requirements, communications, invoicing, and payments. This approach reduced handling

costs, strengthened relationships between producers and recipient organizations, and provided flexibility for both buyers and sellers.

The LFPA experience suggests that administration, relationship-building, procurement coordination, and logistics support may be just as important as physical infrastructure in strengthening regional food systems. It also highlights the potential role of hybrid and virtual coordination models that build upon existing assets rather than relying exclusively on centralized facilities.

3.4 Key Findings

Several key findings emerged from the buyer interviews, market analysis, and procurement case studies conducted as part of this assessment.

Institutional and wholesale demand for local food exists across multiple sectors.

Schools, healthcare systems, colleges and universities, food service management companies, distributors, and food assistance organizations all expressed interest in expanding purchases of locally and regionally produced food. Stakeholders consistently identified opportunities to increase local procurement when products can meet operational requirements.

Buyer interest is driven by both mission and business considerations. Many institutions cited sustainability, community health, local economic development, and food access goals as reasons for pursuing local sourcing. At the same time, buyers emphasized the importance of reliability, quality, operational efficiency, and cost-effectiveness when making purchasing decisions.

Market opportunities extend beyond individual institutions. Interviews with Pomptonian Food Service, Metz Culinary Management, Sysco, and participants in programs such as Pennsylvania Beef to Pennsylvania Schools suggest that significant opportunities exist within larger procurement networks capable of connecting regional producers to schools, healthcare facilities, and other institutional buyers.

Operational requirements remain a significant barrier to expanded local procurement. Buyers consistently identified competitive pricing, reliable supply, food safety compliance, packaging, traceability, delivery logistics, and year-round availability as important purchasing considerations. Expanding producer access to certifications, technical assistance, and market-readiness support may help address these barriers.

Coordinated procurement models can successfully connect producers and buyers.

The LFPA program demonstrated that regional producers can collectively supply large-scale purchasing initiatives when supported by centralized coordination, communication, and administrative capacity. The program provides evidence that many food hub functions

can be implemented successfully through coordinated partnerships and existing infrastructure.

The opportunity may be less about creating demand and more about connecting supply with existing markets. Across nearly all buyer interviews, stakeholders identified opportunities to increase local purchasing if products could be sourced consistently and delivered in ways that align with operational needs. These findings suggest that substantial market opportunities already exist for producers who can meet buyer requirements.

CHAPTER 4. FOOD HUB MODELS, EXISTING ASSETS & STRATEGIC OPPORTUNITIES

Throughout this assessment, stakeholders have identified challenges related to the functions that make up what many food system practitioners refer to as the "midstream." As noted in the Food Systems for the Future Institute's *Midstream Gap Report*, "This midstream space includes the critical activities that occur between farm production and retail consumption: aggregation, processing, packaging, cold and ambient storage, and distribution. These functions enable scale, reduce perishability, and add value. Yet, they are often neglected by policy and underfunded by capital markets." The report further argues that the midstream is more than a logistical function. It is a powerful engine for job creation, entrepreneurship, and regional economic development.

The purpose of this chapter is not to identify a single food hub model for the Greater Lehigh Valley. Rather, it is to evaluate the assets, partnerships, and opportunities already present within the regional food system and consider how they might be strengthened. The case studies and opportunities that follow suggest that the greatest opportunity may not be building an entirely new system, but better connecting and investing in the one that already exists.

Before examining these existing assets and emerging opportunities, it is useful to evaluate the conventional food hub model that often serves as the starting point for regional food system discussions. Centralized food hubs have received significant attention as a strategy for strengthening local supply chains, expanding market access for farmers, and increasing institutional purchasing of local foods. Understanding the economic potential, operational requirements, and limitations of this model provides an important benchmark against which alternative approaches can be evaluated. The analysis that follows is therefore intended not as a recommendation, but as a point of comparison for assessing other opportunities identified throughout this study.

4.1 Evaluation of a Centralized Food Hub Model

Modeling Approach and Assumptions

To better understand the potential economic impacts of a centralized food hub, an IMPLAN economic impact analysis was conducted using assumptions derived from both national food hub benchmarks and regional food system data.

The model was designed to represent a food hub operating at a scale generally considered financially viable within the industry. Annual sales were based on USDA food hub viability benchmarks (*USDA 2015*) which estimate that approximately \$2.4 million in annual sales are required to support a financially sustainable operation. This figure was adjusted for

inflation to approximately \$3.3 million in annual sales. Staffing assumptions were informed by Wallace Center food hub financial benchmarks and regional living wage estimates for Northampton County, resulting in a model that included seven full-time equivalent employees and approximately \$494,000 in annual employee compensation.

The analysis utilized a custom regional geography consisting of Berks, Carbon, Lehigh, Monroe, Northampton, and Schuylkill Counties. This approach reflects the reality that food production, processing, transportation, and purchasing relationships frequently extend beyond county boundaries and function as part of a larger regional economy.

Importantly, the model was informed by findings from this feasibility study and existing regional food system activity. Producer participation data, institutional purchasing opportunities, stakeholder interviews, and lessons learned through implementation of the USDA Local Food Purchase Assistance (LFPA) Program all helped inform assumptions regarding regional capacity and market potential. Between 2023 and 2025, more than forty farms supplied approximately 2.15 million pounds of food through LFPA, generating nearly \$1.9 million in sales. While LFPA data was not used as a direct economic input within the model, it provided important evidence that significant levels of coordinated local procurement can occur within the region. (*Second Harvest* 2025)

The analysis therefore does not represent a hypothetical food hub operating in isolation. Rather, it estimates the economic impacts associated with a financially viable food hub operating within the context of the Greater Lehigh Valley food system.

Economic Potential of a Centralized Food Hub

The IMPLAN analysis indicates that a successful centralized food hub could generate meaningful economic impacts throughout the regional economy. Depending on model configuration, total economic output ranged from approximately \$5.6 million to \$6.3 million annually. Employment impacts ranged from approximately 21 to 24 jobs, while total value-added impacts exceeded \$2.8 million across all scenarios examined.

These findings suggest that a centralized food hub could serve as an important economic development asset. In addition to supporting direct employment, a food hub would generate purchases from regional suppliers, transportation providers, service businesses, and producers. Employee spending and business-to-business transactions would further circulate dollars throughout the local economy, creating indirect and induced economic impacts beyond the facility itself.

The modeling results also reinforce findings from stakeholder interviews regarding the economic potential of strengthening local and regional supply chains. By creating new market opportunities for producers and increasing the flow of food dollars through regional businesses, a food hub could contribute to broader economic resilience while supporting agricultural viability.

From a purely economic perspective, the analysis demonstrates that a centralized food hub has the potential to generate substantial regional benefits if operated at a scale sufficient to achieve long-term financial viability.

Considerations and Limitations of a Centralized Hub Model

While the economic impacts identified through the IMPLAN analysis are significant, the findings of this feasibility study suggest that the region's most immediate needs may not require a large, centralized facility.

The model assumes a food hub capable of sustaining approximately \$3.3 million in annual sales, maintaining dedicated staff, and operating at a level consistent with national viability benchmarks. Achieving and sustaining this scale would require substantial producer participation, reliable institutional purchasing commitments, significant management capacity, and ongoing operating capital.

The broader findings of this study indicate that many of the barriers limiting local food sales are not simply a matter of infrastructure. While producers identified needs related to processing, aggregation, transportation, and storage, they also pointed to challenges involving market access, procurement coordination, food safety certifications, and navigating institutional purchasing systems. Some of these barriers require physical investments, while others can be addressed through stronger coordination, shared services, technical assistance, and strategic partnerships. The "missing middle" is not just warehouses and trucks; it also includes the support systems that help producers become market-ready.

The LFPA experience provides a particularly important point of comparison. Through a largely decentralized model, more than 2.15 million pounds of food moved through coordinated procurement systems involving over forty farms and community partners. Approximately \$1.18 million in LFPA purchases occurred through direct producer-to-agency transactions, demonstrating that substantial food movement can occur when coordination, administration, and trusted relationships are in place, even without centralized aggregation infrastructure. (*Second Harvest* 2025)

While a centralized food hub could generate economic benefits under the right conditions, the findings suggest that significant operational, financial, and market-development challenges would need to be addressed before such an investment could be considered viable. These findings support a phased approach that prioritizes food hub functions and strategic partnerships before major investments in new facilities.

Conclusion

The IMPLAN analysis demonstrates that a centralized food hub could generate substantial economic impacts if operated at a scale sufficient to achieve long-term financial viability. The model suggests that such a facility could support jobs, increase regional economic activity, and strengthen local supply chains.

At the same time, the findings of this feasibility study suggest that the Greater Lehigh Valley is not currently constrained by a lack of producer capacity or buyer interest. Instead, the most significant barriers appear to exist within the "missing middle" of the food system, including coordination, processing, aggregation, logistics, market development, and producer readiness.

For this reason, the evidence does not support immediate investment in a large, centralized food hub facility as the first step in regional food system development. Rather, the findings point toward a phased approach that prioritizes food hub functions before food hub facilities. Strategic investments in procurement coordination, value-added processing, pilot purchasing initiatives, technology-enabled market development, producer support services, and targeted infrastructure improvements may offer a lower-risk pathway for building the relationships, markets, and operational capacity necessary to support larger infrastructure investments in the future.

In this context, the feasibility question is not whether the Greater Lehigh Valley can support a food hub. The evidence suggests it can. The more important question is which functions should be developed first, and how those functions can be implemented in a way that builds upon existing assets, responds to demonstrated market demand, and positions the region for long-term success.

4.2 Evaluation of Existing Asset-Based Approaches

Pennsylvania Co-Operative Potato Growers: Leveraging Existing Supply Chains

One of the clearest findings to emerge from this study is that the Greater Lehigh Valley is not starting from zero. Throughout the assessment, we repeatedly encountered organizations and businesses already performing pieces of the work often associated with food hubs. The Pennsylvania Co-Operative Potato Growers provides a strong example of how existing assets can be leveraged to strengthen local and regional food systems. The cooperative includes farms throughout eastern Pennsylvania, including several located within the Greater Lehigh Valley foodshed. During interviews conducted for this study, cooperative leadership identified four member farms in Lehigh and Northampton Counties—Twin Maple Farms, Country View Farms, Flint Hill Farm, and Geiger Family Farms—as potential suppliers for institutional potato products processed through Keystone Potato Products, a Pennsylvania-based potato processing facility partially owned by the cooperative. Through Keystone, member farms have access to a range of value-added processing capabilities, including whole, peeled, sliced, frozen, flaked, and french fry products, creating an established pathway for serving institutional and wholesale markets.

The cooperative's scale illustrates how many food hub functions already exist within mature agricultural sectors. Cooperative representatives reported moving approximately 83,000 tons of potatoes annually through established aggregation, processing, and distribution networks. Existing transportation systems and distribution partnerships allow products to move efficiently from farm to processor to buyer. This finding demonstrates that the supply chain is not simply regional in theory; it already includes producers located within the study area and capable of participating in institution-scale procurement opportunities.

The relevance of this infrastructure became apparent through discussions with Pomptonian Food Service who expressed interest in sourcing locally grown potato products and estimated a potential demand of approximately 175,000 pounds annually. When presented with this estimate, representatives of the Pennsylvania Co-Operative Potato Growers indicated that supplying this volume would be readily achievable within existing production capacity. Cooperative representatives also noted that potatoes can be packaged according to buyer specifications, including smaller institutional pack sizes, and delivered in formats tailored to school, healthcare, and food service operations.

These discussions also highlighted potential opportunities associated with Local Food for Schools (LFS) and similar procurement programs. Initial research suggests that potatoes grown by cooperative member farms and processed through Keystone Potato Products may qualify under certain local and regional purchasing guidelines applicable to New Jersey schools. Cooperative representatives noted that products can be sourced from specific member farms and traced throughout the supply chain, allowing buyers to meet geographic sourcing requirements where applicable. Rather than requiring an entirely new supply chain, these conversations suggest that existing regional infrastructure may already be positioned to support local institutional purchasing programs.

At the same time, this example also illustrates the limitations of traditional food hub models within mature commodity sectors. Potatoes are already produced, aggregated, processed, transported, and marketed through a highly developed and price-sensitive supply chain. Approximately 60 percent of cooperative potatoes are ultimately sold into Pennsylvania's potato chip manufacturing sector, demonstrating the extent to which value-added processing and distribution systems are already integrated into the industry. As cooperative representatives noted, pricing is largely dictated by established markets, leaving limited room for additional intermediaries to capture value. Team Pennsylvania shared a similar observation, noting that it can be cheaper for major processors to source potatoes from the Midwest than from Pennsylvania growers—a reminder that proximity alone does not guarantee competitive supply chains.

In this context, creating a new aggregation or distribution system for potatoes would likely duplicate services that already exist. **Instead, the opportunity may lie in helping connect existing assets to new markets.** Pennsylvania Co-Operative Potato Growers leadership expressed strong interest in expanding sales to schools, hospitals, and other institutional

buyers and identified market development as a primary need. **Here, the role of a food hub is not to replace existing infrastructure, but rather to serve as a connector, convener, and market development partner.** Thus, helping producers, processors, distributors, and institutional buyers navigate procurement requirements, pilot new products, and build long-term purchasing relationships.

The lessons from the potato sector have broader implications for regional food system development. They suggest that some of the most effective food hub strategies may involve strengthening existing value chains, supporting market expansion, and addressing coordination gaps rather than creating entirely new supply chains. The potato example raises an important question for future food hub development: where can existing systems be leveraged, expanded, or replicated to serve additional products, producers, and markets?

River Valley Community Grains and Marksboro Mills: Building New Value Chains

While the Pennsylvania Co-Operative Potato Growers demonstrates the strength of an established agricultural value chain, River Valley Community Grains (RVCG) and Marksboro Mills illustrate a different opportunity: the creation of entirely new markets through regional processing infrastructure and coordinated supply chain development.

Located in neighboring Warren County, New Jersey, River Valley Community Grains was founded in 2016 as a small direct-to-consumer milling operation. Since then, it has evolved into a regional grain processor and distributor anchored by Marksboro Mills, a permanent stone-milling facility that connects local grain producers with bakeries, restaurants, food businesses, and distributors throughout New Jersey, New York City, and Philadelphia.

Today, RVCG mills approximately 175,000 pounds of grain annually sourced from five New Jersey farms. Yet despite this growth, the organization reports that it is currently meeting only about 30 percent of existing demand for locally grown grain products. To address supply shortages, RVCG supplements production with organic grain sourced from Pennsylvania mills, including Small Valley Milling in Halifax, Pennsylvania. These figures suggest that demand for regionally produced food-grade grain significantly exceeds current supply.

The significance of this model extends well beyond grain processing. Unlike potatoes, which already benefit from mature aggregation, processing, and distribution systems, grain represents a sector where entirely new value chains can be developed. Marksboro Mills demonstrates how targeted investments in processing infrastructure can create new market opportunities for farmers while retaining more value within the regional food economy.

Perhaps most importantly, the model highlights a substantial opportunity for conventional grain producers. Many farmers already possess the equipment necessary to grow food-

grade grains, including seed drills, planters, and combines. The primary barrier is often access to cleaning, screening, processing, and marketing infrastructure. By providing shared processing services and technical assistance, RVCG has lowered the barriers to entry for farmers interested in accessing higher-value food markets.

The economic implications are significant. While conventional corn may generate approximately \$4–5 per bushel, organic wheat sold into food-grade markets can generate as much as \$17 per bushel. When paired with stable market demand, this difference can result in substantially higher revenues per acre and create new opportunities for farm profitability. To support this transition, RVCG works with agronomist Elizabeth Dyck of the Organic Growers Research Information-Sharing Network (OGRIN), providing participating farmers with technical assistance related to soil health, organic transition planning, and risk management.

For the Greater Lehigh Valley, this model presents a particularly compelling opportunity. Approximately 52 percent of farmland within the study area is currently devoted to commodity grain production, primarily corn and soybeans. Even a modest shift toward food-grade grain production could create meaningful new revenue opportunities for farmers while increasing the region's capacity to supply local and regional food markets. The difference in value can be substantial: while conventional grain markets often operate on thin margins, organic food-grade grains can command significantly higher prices when paired with processing infrastructure and reliable buyers. This creates an opportunity to generate greater economic value from existing farmland while expanding the region's role in supplying higher-value food products.

The Marksboro Mills model also demonstrates the importance of sequencing. Rather than beginning with infrastructure alone, RVCG first cultivated demand among bakeries, restaurants, and food businesses. Once a loyal customer base and strong demand for locally milled grains had been established, the organization transitioned from direct sales to working through a regional food distributor. Because the products already had a proven market and customer following, the distributor was eager to add them to its product portfolio. This partnership allowed RVCG to significantly expand its reach while leveraging an existing distribution network rather than building one from scratch.

This progression—from product development, to market validation, to distributor partnership—offers an important lesson for regional food system development. In some cases, the most effective strategy may not be creating entirely new distribution systems, but rather helping local producers and processors develop products and markets that can ultimately be integrated into existing commercial channels.

The organization reports profit margins of approximately 30 percent, is actively recruiting additional farmers, and plans to purchase a second mill and explore additional processing locations. These indicators suggest that the model is not only operationally viable but positioned for continued growth.

Conversations with Team Pennsylvania further suggested that few statewide initiatives are currently focused on expanding grain production for human consumption, highlighting the unique role that regional partnerships such as Marksboro Mills are beginning to play in developing these markets.

Perhaps the most important lesson from Marksboro Mills is that demand came first. The organization spent years building relationships with buyers before expanding processing capacity and recruiting additional farms. Today, demand for locally grown grain exceeds available supply. The model demonstrates that when farmers have access to processing, technical support, and reliable markets, higher-value production can become a realistic alternative to commodity agriculture.

The Farmstead Table: Shared Processing and Dairy Diversification

While Marksboro Mills demonstrates how processing infrastructure can create entirely new markets, The Farmstead Table illustrates how shared processing capacity can help existing farms diversify and capture more value from products they already produce. The business highlights another important food hub function: providing access to specialized manufacturing capacity that would be difficult for individual farms to develop on their own. Dairy remains a cornerstone of Pennsylvania agriculture, yet many smaller dairies face ongoing economic pressure from volatile milk prices, rising production costs, and industry consolidation. For many farms, reliance on traditional fluid milk markets is no longer sufficient to ensure long-term viability. Diversification into value-added products has therefore become an increasingly important strategy for improving farm income and building resilience. Products such as cheese, yogurt, kefir, frozen dairy desserts, and single-serve institutional products can generate significantly more value than fluid milk alone, but many farms lack the facilities, expertise, or capital needed to produce and market these products independently.

The Farmstead Table provides a strong example of how shared processing can help address this challenge. Founded by cheesemaker Steve Dougherty in 2019, the business began as a farmstead cheese operation in New Tripoli, partnering with a local dairy farm using organic, pasture-based practices. The company produced a range of fresh, aged, and ripened cheeses and quickly developed a loyal customer base.

As demand increased, Dougherty expanded production by incorporating goat milk and developing additional cheese varieties. In 2023, the business relocated to a larger facility in Shoemakersville, transitioning away from on-farm production in order to focus on scaling manufacturing capacity. The move allowed the company to source milk from multiple farms while maintaining a commitment to pasture-based grazing and high animal welfare standards.

Over the past two years, The Farmstead Table has increasingly shifted toward co-manufacturing value-added dairy products for other farms and food businesses. Today, the facility produces cheese, yogurt, ice cream, and other dairy products for multiple clients,

allowing smaller farms to access processing capacity that would otherwise be financially out of reach. Demand for these services continues to grow, particularly among independent dairies seeking to diversify beyond commodity milk markets.

This model is important because it allows multiple farms to benefit from shared equipment, technical expertise, regulatory systems, and production capacity without each farm having to build its own facility. In this way, shared manufacturing lowers barriers to entry while helping farms participate in higher-value markets.

Dougherty also identified several constraints that currently limit growth. These include the need for capital investment in specialized equipment, working capital to support larger production volumes, and the challenges of serving multiple small-scale clients with varying production schedules and needs. He also noted that achieving Grade A certification could unlock significant opportunities in New York, New Jersey, and institutional markets. Importantly, the barriers identified were not related to lack of demand. Producer interest, consumer demand, and market opportunities were all evident. Instead, growth was constrained by familiar themes that emerged throughout this assessment: financing, infrastructure, regulatory readiness, and coordination.

The LFPA experience provides additional evidence of demand for locally produced value-added dairy products. During the program period, regional dairy producers generated more than \$200,000 in dairy sales (*Second Harvest* 2025) through coordinated procurement efforts. Participating food pantries reported strong interest in products such as goat milk, kefir, and other culturally significant dairy items that are often difficult to source through conventional emergency food channels. These products helped address gaps identified by food assistance organizations while better reflecting the needs of the Lehigh Valley's increasingly diverse population.

Together, The Farmstead Table and the LFPA dairy experience suggest that value-added dairy processing can support both farm viability and food access goals when products are aligned with real market and community demand. Like the Pennsylvania Co-Operative Potato Growers and Marksboro Mills, The Farmstead Table demonstrates that some of the region's most promising opportunities may lie in strengthening existing businesses that already perform food hub functions.

Rather than creating entirely new infrastructure, targeted investments in facilities such as The Farmstead Table could help expand processing capacity, create new revenue opportunities for farms, and increase the availability of locally produced dairy products in retail and institutional markets. More broadly, the case illustrates how shared processing can help farms move beyond commodity markets and capture a greater share of the food dollar.

Apple Ridge Farm and Collective Culture: Expanding Value Through Processing

Apple Ridge Farm in Saylorsburg offers another example of how value-added processing can strengthen regional food systems without requiring large-scale infrastructure investments. Through its Collective Culture brand, the farm produces a range of fermented foods, kombucha, and other value-added products using ingredients grown both on-farm and sourced from neighboring producers.

What makes the model particularly noteworthy is the way it creates value throughout the supply chain. Apple Ridge purchases vegetables from regional farms, processes them into higher-value products with extended shelf life, and distributes those products through farmers markets, retail outlets, and wholesale channels. Participating farms are able to purchase finished products back at wholesale prices and resell them directly to their own customers, creating an additional revenue stream from crops they originally supplied. Summer Kitchen Farm in Nazareth illustrates the potential impact of this approach. The farm plans to grow at least 4,000 pounds of cabbage annually for Collective Culture products and anticipates not only increased produce sales, but also additional revenue through the resale of finished fermented products. According to the farm, this arrangement could generate an additional \$4.25 per pound in value from the same crop.

The model highlights the importance of cold-chain infrastructure and regional distribution networks in supporting value-added food businesses. Rather than functioning solely as a farm, Apple Ridge operates as a processor, aggregator, marketer, and distributor—performing many of the same functions commonly associated with food hubs.

The Apple Ridge model reinforces a recurring finding of this assessment: investing in and supporting existing businesses—and connecting them to additional producers—may, in some cases, offer a more efficient path than building entirely new infrastructure.

Crooked Row Farm: Small-Scale Aggregation and Market Access

Crooked Row Farm in Orefield demonstrates how food hub functions can emerge organically through successful farm businesses. What began as a small organic farm has evolved into a retail operation that sources products from dozens of local growers and food producers throughout the season. Through its farm market, Crooked Row provides customers with access to a diverse selection of locally produced foods while creating an additional sales outlet for neighboring farms and food businesses.

The model highlights the importance of aggregation, marketing, and customer relationships at a scale that is both practical and financially sustainable. During interviews, Crooked Row's experience suggested that strong local demand exists for regionally produced food when products are convenient, well-merchandised, and supported by trusted relationships. As the Greater Lehigh Valley considers future food hub strategies, the

business illustrates how existing enterprises can perform many food hub functions while remaining deeply connected to both producers and consumers.

4.3 Value-Added Processing: Infrastructure and Market Expansion Opportunities

Why Processing Matters

Throughout interviews, surveys, and stakeholder conversations, value-added processing consistently emerged as a significant opportunity to expand local food sales, improve farm profitability, reduce food waste, and create institution-ready products that better align with buyer needs.

Many of the opportunities identified through this assessment fall within what is often referred to as the "missing middle" of the food system—the aggregation, processing, storage, packaging, transportation, food safety, and market coordination functions that connect farms to larger markets. The findings suggest that the Greater Lehigh Valley does not lack producers or potential buyers. Rather, many of the barriers identified by stakeholders involve the systems and services needed to connect the two efficiently and at scale.

This gap affects both producers and buyers. Producers frequently lack affordable pathways for creating value-added products or extending the marketability of surplus crops, while institutional buyers often require products that reduce labor requirements and fit within existing procurement systems. Institutional kitchens face staffing shortages, limited preparation time, and operational constraints that make it difficult to utilize large quantities of raw agricultural products. As a result, products that arrive washed, chopped, peeled, frozen, packaged, or otherwise prepared for use often offer greater market potential than raw commodities alone.

These findings were reinforced by both buyer and producer feedback. Metz Culinary Management indicated that access to lightly processed products would increase its likelihood of purchasing through a regional food hub and identified interest in processed fruits and vegetables, preserved foods, sauces, dairy products, grains, and other institution-ready products. Similarly, Pomptonian Food Service expressed interest in clean-label sauces, soups, and plant-based prepared foods, noting growing demand from schools and families for healthier meal options. Representatives also emphasized that many schools lack the kitchen facilities, staffing, and preparation capacity needed to produce these items from scratch, creating opportunities for value-added products that are both nutritious and operationally practical. Producer survey respondents likewise identified strong interest in packaging services, supply chain access, cold storage, canning, flash freezing, and other forms of value-added processing.

Taken together, these findings suggest that some of the region's greatest opportunities may lie not in fresh food distribution alone, but in helping transform locally produced agricultural products into forms that better meet buyer needs. Products such as sauces, soup bases, frozen vegetable blends, purees, prepared ingredients, and other institution-ready foods may allow producers to access larger markets while creating new revenue streams and retaining more value within the regional economy.

Existing Processing Gaps

At the same time, the Lehigh Valley lacks much of the food system infrastructure typically associated with value-added production. As shown in Figure 12, the region currently has limited access to co-packing, cold storage, freezing, grain processing, and other post-harvest services. While some facilities exist in adjacent counties, producers often must travel outside the region to access processing services or forego value-added opportunities altogether.

Figure 12. Food Supply Chain Infrastructure Available in and near the Lehigh Valley

Food Chain Infrastructure	Lehigh Valley (2013)	Lehigh Valley (2025)	Proximate (Abutting Counties)
Packing Facilities	0	0	0
Co-Packers	0	0	1
Cold Storage	0	0	0
Incubator Kitchens	1	1	3
Manufacturing Incubator*	0	1	0
Freezing Facilities	0	0	0
Grain Mills	0	0	2
USDA-Inspected Meat Processing	0	2	6
On-Farm Poultry Processing	Varies	Varies	3
Mobile Poultry Processing Unit	0	0	2
Food Hub	0	0	2

*Manufacturing incubator refers to facilities supporting small-scale food manufacturing, product development, and value-added food enterprises.

Existing processing infrastructure remains limited. Stakeholder interviews repeatedly identified a shortage of co-packing, contract manufacturing, and value-added processing capacity for small and mid-sized producers. Bauman's Apple Butter in neighboring Berks County illustrates both the importance and scarcity of these services. The historic family-run facility has been in continuous operation since 1892 and serves approximately 100 farms from across eastern Pennsylvania, New Jersey, and Maryland. Bauman's operates at full capacity, providing one of the few remaining outlets for products such as cider, applesauce, fruit butters, and sauces. The lack of comparable facilities within the Greater

Lehigh Valley helps explain why value-added processing became a recurring theme throughout this assessment.

The consequences extend beyond missed processing opportunities. Limited processing capacity restricts options for handling surplus crops, extending seasonal availability, and creating products that meet institutional purchasing requirements.

Flash Freezing & Cold Chain Opportunities

Without adequate storage and processing options, producers often have limited outlets for surplus crops and few mechanisms for extending product availability beyond the growing season. As a result, stakeholders repeatedly identified two related challenges: food waste during peak harvest periods and the difficulty of supplying local products to institutional buyers year-round. Flash freezing offers a potential solution to both.

Nationally, an estimated 17.4 million tons of food are lost annually at the farm level, representing both an economic loss for producers and a missed opportunity to strengthen regional food systems. Investments in cold storage and freezing infrastructure have been identified as among the most effective strategies for reducing these losses while expanding market opportunities for farmers. (*Food Systems for the Future Institute 2026*)

Individually Quick Frozen (IQF) vegetables can be harvested at peak freshness, processed shortly after harvest, and stored for use throughout the year. Products such as diced sweet potatoes, green beans, peppers, broccoli, and soup vegetable blends can be transformed from highly seasonal products into institution-ready ingredients with significantly longer shelf lives. In doing so, freezing creates a bridge between seasonal farm production and year-round market demand.

The potential value extends beyond preserving products for later sale. Value-added processing can also create productive uses for crops that might otherwise go unsold due to cosmetic standards, timing, or volume mismatches. Many farms routinely produce nutritious, high-quality food that is difficult to market through conventional channels, resulting in economic losses and unnecessary food waste.

CommonWealth Kitchen, a Massachusetts-based food business incubator and food hub, provides a compelling example. Working with farmers and food entrepreneurs, the organization helped develop a yellow field pea fritter made from locally grown peas that previously had limited market value. Through product development, processing, and market testing, the frozen fritters are now served in schools, hospitals, and universities. The example demonstrates how underutilized crops can be transformed into institution-ready foods while creating new revenue opportunities for producers.

Interviews with Pomptonian Food Service and Metz Culinary Management identified frozen vegetables as a specific procurement need. Representatives noted substantial annual purchases of frozen potato products.

Flash freezing is particularly noteworthy given the Lehigh Valley's unique assets. Air Products, headquartered in the region, pioneered many of the cryogenic freezing technologies that underpin modern IQF systems and remains a global leader in food freezing technology. Yet despite this connection, freezing infrastructure remains largely absent from the regional food system. Interviews conducted through this assessment identified cold storage and freezing capacity as one of the most significant infrastructure gaps limiting producer growth, food recovery efforts, and expansion into wholesale and institutional markets.

The opportunity extends beyond individual farms or buyers. The *Pennsylvania Agriculture Economic Analysis 2025*, prepared by Team Pennsylvania, identified strengthening in-state supply chains as one of the Commonwealth's most significant agricultural development opportunities. The report found that Pennsylvania continues to import substantial volumes of products, including frozen vegetables, even though many of these crops can be grown within the state. The challenge is not a lack of agricultural capacity, but rather a lack of infrastructure needed to connect local production with existing demand.

This finding mirrors many of the challenges identified throughout this assessment. Products such as broccoli, green beans, peas, mixed vegetable blends, winter squash, and processing tomatoes are frequently sourced from outside Pennsylvania despite being well-suited to local growing conditions. In many cases, the missing link is not production, but the infrastructure needed to transform seasonal harvests into products that can move efficiently through wholesale and institutional supply chains. Flash freezing represents one potential strategy for addressing this gap while retaining more food dollars within the regional economy.

These findings were echoed by Team Pennsylvania, which identified cold chain and processing infrastructure as emerging opportunities for agricultural economic development and noted growing supply chain challenges associated with sourcing greens and other produce traditionally supplied from western states. Together, these trends may create new opportunities for Pennsylvania producers able to extend seasons, process products, and serve regional markets.

Value-added processing can help producers and food hubs capture higher margins, improve utilization of surplus crops, reduce food waste, and overcome some of the scale limitations that make institutional markets difficult for individual farms to serve. And as the Greater Lehigh Valley considers future food system investments, flash freezing may represent one of the most promising opportunities for linking local agriculture, food manufacturing and institutional procurement.

Economic Implications

Research suggests that investments in post-harvest infrastructure can generate substantial economic returns while reducing food loss and expanding market

opportunities. Cold storage alone has been shown to reduce post-harvest losses by as much as 25–50 percent in some regions. A recent World Bank analysis found that every dollar invested in post-harvest infrastructure returns approximately three to four dollars through reduced waste, increased farm income, and expanded market access. Similarly, the Midstream Gap Report found that modular investments—including cold storage, freezing systems, and mobile processing units—often achieve payback periods of less than three years while generating economic, environmental, and community benefits. (*Food Systems for the Future Institute* 2026)

These findings suggest that targeted investments in processing, cold storage, and value-added production may offer a lower-risk pathway for strengthening regional food systems than large, centralized infrastructure projects. In addition to improving market access, value-added processing can help producers capture higher margins, reduce food waste, utilize surplus crops more effectively, and overcome some of the scale limitations that make institutional and wholesale markets difficult for individual farms to serve.

4.4 Educational and Workforce Development Partnerships

Throughout this assessment, producers, buyers, and community partners repeatedly identified value-added processing as one of the most significant opportunities for strengthening the regional food system. Producer survey responses indicated strong interest in accessing processing services, while institutional buyers expressed interest in products that reduce labor requirements, improve consistency, and extend product availability. Case studies involving grains, dairy, and frozen products further demonstrated the potential for processing to create new markets, reduce food waste, and improve farm profitability.

One of the most promising opportunities identified through this assessment emerged before the study formally began. When Primordia Mushroom Farm approached Buy Fresh Buy Local Greater Lehigh Valley for assistance developing value-added products, it quickly became apparent that many of the services needed to support product development simply did not exist within the regional food system. Recipe development, research and development, shelf-life testing, and basic food science support were difficult for small producers to access despite growing interest in creating higher-value products.

In response, Buy Fresh Buy Local partnered with Northampton Community College's Culinary Arts Program to launch a pilot project. Through an independent study course, a culinary student worked directly with Primordia to develop new products, including a mushroom-based energy bar and a line of mushroom seasonings and nutritional powders. These products are now being sold by Primordia, demonstrating how value-added processing can create new markets for locally grown products while retaining more value within the regional food economy.

More importantly, the experience revealed a larger opportunity. Educational institutions can help connect students to the regional food system through hands-on food hub activities embedded within the curriculum. In doing so, students gain exposure to careers beyond traditional restaurant work, including food manufacturing, product development, and food science.

The concept is not without precedent. During stakeholder interviews, representatives of the Food Dignity® Movement highlighted the Wilkes-Barre Area Career & Technical Center (WBACTC) Food Hub Program, which integrates food hub operations directly into a career and technical education setting. Operating on the WBACTC campus, the program sources food from 43 local farms and distributes fresh products to more than 1,100 students and 15 nonprofit organizations. The program aims to distribute approximately 65,000 pounds of produce annually while purchasing more than \$200,000 in local food. Students gain hands-on experience in procurement, warehousing, and logistics while supporting local farms and increasing community food access.

The success of the WBACTC initiative demonstrates that educational institutions can play a meaningful operational role within regional food systems, extending beyond traditional classroom instruction. Together, the NCC pilot and WBACTC Food Hub suggest that career and technical schools may represent one of the region's most underutilized food system assets.

This concept gained additional support during the feasibility study through discussions with Bethlehem Area Vocational-Technical School (BAVTS). As a partner in the proposed USDA Regional Food System Partnership initiative, BAVTS expressed strong interest in supporting value-added product development, workforce training, and pilot-scale processing activities. The school has committed culinary kitchens and instructional lab space, student participation in recipe development and product testing, faculty support related to food safety and product development, and applied learning opportunities focused on packaging, branding, graphic design, and marketing.

Contingent on the RFSP grant, BAVTS also committed to supporting pilot-scale food processing activities and exploring the use of flash-freezing equipment as part of workforce development and applied learning programs. Under this model, students could participate in the processing, packaging, branding, and distribution of locally grown products while gaining hands-on experience in food manufacturing and supply chain operations.

The concept is particularly noteworthy because BAVTS is in the process of expanding into a recently acquired 40,000-square-foot facility in South Bethlehem that previously housed a food and beverage business incubator and includes commercial food production infrastructure. The facility may provide a unique opportunity to test food processing, workforce development, and value-added production activities within an educational setting.

The workforce development component may also create opportunities for partnerships that extend beyond agriculture. Because BAVTS combines food processing, technical education, and career pathway development, the model aligns with the interests of organizations that support workforce training, economic development, and community investment. This may be particularly relevant in the Lehigh Valley, where the Air Products Foundation has a long history of supporting educational, workforce development, and community-based initiatives. While any future partnership would require further exploration, the educational component of the BAVTS model may create opportunities that would not exist through a traditional commercial processing facility alone.

The concept is notable because it offers a practical way to test products and markets before pursuing larger infrastructure investments. Rather than beginning with a dedicated processing facility, a pilot-scale approach focused on flash freezing could evaluate buyer demand, operational requirements, product specifications, packaging needs, and pricing strategies while simultaneously providing workforce training and real-world production experience. **The approach aligns closely with findings from this assessment, which consistently pointed toward phased implementation strategies that reduce risk while building capacity.**

The participation of Metz Culinary Management further strengthens this opportunity. As another partner in the proposed USDA Regional Food System Partnership initiative, Metz has committed to participating in pilot purchasing activities involving regional producers and Metz-managed accounts serving more than 15,000 individuals throughout the Lehigh Valley.

Nationally, food hubs report that navigating institutional procurement systems remains a significant barrier to market expansion. Metz has expressed a strong interest in increasing purchases from regional producers and helping navigate those systems. Rather than trying to enter the largest markets first, Metz identified opportunities to begin with smaller, chef-driven accounts that have both the flexibility and kitchen capacity to work with local products. As supply chains mature and products become more standardized, those opportunities can expand into larger school districts, hospitals, and other institutional settings.

The opportunity is particularly compelling given Metz's relationship with the Bethlehem Area School District and BAVTS. Under this model, locally grown fruits and vegetables could be transformed into value-added products through student-led processing activities at BAVTS and then purchased by Metz for use within its institutional food service programs. **In a very real sense, students would be helping produce food for other students.** The model creates a direct connection between local farms, schools, and institutional markets while giving students hands-on experience.

These partnerships also align closely with opportunities identified elsewhere in this assessment. Producers expressed interest in value-added products that could increase

profitability and reduce waste. Interviews identified opportunities related to frozen vegetables, soup bases, sauces, dairy products, seasonings, and other institution-ready foods.

Taken together, these partnerships suggest a practical pathway for advancing value-added food production in the Greater Lehigh Valley. Rather than beginning with a dedicated processing facility, the region could start by leveraging existing educational infrastructure to test products, build producer capacity, train future workers, and evaluate market demand. This phased approach reduces risk while creating opportunities to learn which products, services, and infrastructure investments are most likely to succeed.

The broader lesson emerging from this assessment is that some of the most valuable food hub assets may already exist within the community. In this case, a producer's need for product development support revealed an opportunity to connect agriculture, education, workforce development, and institutional procurement through a shared regional platform. As the Greater Lehigh Valley considers future food hub strategies, educational institutions such as NCC and BAVTS may provide an ideal foundation for strengthening the "missing middle" of the regional food system.

4.5 Lessons from Existing Food Hub Models

Interviews with established food hub operators provided important context for interpreting the opportunities identified throughout this chapter. While their organizational structures differ, both Red Tomato and Freshlist reinforced a central finding of this assessment: successful food system development is driven by market demand, strong relationships, and strategic investments in key functions rather than infrastructure alone.

Red Tomato, a nonprofit food hub based in Providence, Rhode Island, provides a useful example. Founded nearly thirty years ago, the organization originally operated with trucks, coolers, and warehouse space. Over time, however, it moved away from owning infrastructure and developed a more asset-light model, coordinating sales, marketing, logistics, and distribution through farmers, independent distributors, and long-term supply chain partners. This shift reduced the burden of maintaining expensive fixed assets while allowing the organization to focus on building markets and supporting producers. Today, Red Tomato coordinates approximately \$5 million in annual produce sales across nine northeastern states.

Perhaps the most relevant lesson from Red Tomato is its emphasis on demand-driven development. Rather than building infrastructure first, the organization identifies buyer demand, determines whether growers can meet product, volume, quality, and pricing requirements, and then tests opportunities at a manageable scale. Leadership described this as a "crawl, walk, run" approach: start with a minimal viable solution, learn from real transactions, and scale only after the market and logistics have been proven. This lesson

closely aligns with the phased implementation approach emerging throughout this assessment.

Freshlist, a for-profit food hub based in Charlotte, North Carolina, reinforced many of the same themes. When presented with the possibility of serving a large school food service provider, Freshlist leadership cautioned against pursuing large institutional contracts before supply chains have been tested at smaller scales. Their recommendation was to begin with a limited number of buyers and products, expect challenges, refine systems, and expand only after operational capacity has been demonstrated. This approach mirrors several opportunities identified throughout this assessment, including the phased procurement strategy being explored with Metz Culinary Management.

Freshlist's experience also highlighted the amount of work required to prepare farms for wholesale and institutional markets. Drawing on his prior experience helping launch a food hub in Northwest Arkansas, Freshlist CEO Anthony Mirisciotta described a process that required more than a year of grower outreach, wholesale readiness training, and relationship building before significant sales volumes could be achieved. The experience reinforces one of the clearest findings of this assessment: producer readiness is itself a food hub function. Technical assistance, certifications, crop planning, and market preparation are often just as important as physical infrastructure.

Freshlist also underscored the importance of diversified market channels and strong buyer relationships. Restaurants were identified as a particularly useful entry point because they often have greater flexibility and are frequently led by "chef champions" willing to adapt menus, test new products, and work through supply challenges with local producers. Successful food hubs often build momentum through relationships with early adopters before expanding into larger and more complex purchasing environments.

Finally, Freshlist provided important validation for the flash-freezing opportunity identified in this assessment. In discussing value-added processing strategies, leadership noted that many processed products become difficult to price competitively once labor and handling costs are added. Freezing, however, was identified as one of the more practical forms of value-added processing because it extends shelf life and marketability without dramatically increasing production costs. This observation reinforces opportunities identified throughout this assessment to reduce food waste, extend product availability, and improve access to institutional markets.

Red Tomato also demonstrates that food hubs can create value in ways that extend beyond aggregation and distribution. Recognizing that many small and mid-sized farms were using environmentally responsible production practices without pursuing organic certification, the organization developed its EcoCertified brand to communicate those attributes to buyers and consumers. The program created a recognizable market identity that helped participating farms differentiate their products and access premium markets like grocery

store chains. The experience illustrates how branding and product differentiation can strengthen farm profitability and create additional value throughout the supply chain.

Taken together, the Red Tomato and Freshlist interviews reinforce the direction emerging from this assessment. The strongest path forward is not to build a large, centralized facility and then search for markets to fill it. Rather, it is to start with demonstrated demand, test opportunities at a manageable scale, support producers in becoming market-ready, develop diversified revenue streams, and invest strategically in infrastructure where clear gaps exist. In other words, build the food hub functions before building the food hub.

4.6 Financial Sustainability and Supporting Revenue Streams

The findings of this assessment suggest that financial sustainability should be a central consideration in future food hub development efforts. While grants and philanthropic investments can play an important role in supporting start-up activities, pilot projects, infrastructure investments, and market development, long-term success ultimately depends on the ability to generate sufficient earned revenue to support ongoing operations.

Recent findings from the National Food Hub Survey highlight the challenges many food hubs continue to face. In 2025, 51 percent of surveyed food hubs reported being highly dependent on grant funding—the highest proportion reported during the six-year history of the survey. Food hubs also identified access to capital, business growth management, infrastructure investments, uncertainty surrounding federal funding, and increasing operating costs as persistent challenges. These findings suggest that even successful food hubs often struggle to achieve financial sustainability through product sales alone. (*Michigan State University Center for Regional Food Systems 2025*)

CommonWealth Kitchen, a nationally recognized food business incubator and food hub in Massachusetts, illustrates this challenge. In 2023, approximately 77 percent of its revenue came from fundraising and philanthropic support, while earned income from shared kitchen operations, manufacturing, events, and other activities accounted for the remainder. Despite generating millions of dollars in annual economic activity and supporting food entrepreneurs throughout the region, the organization reported expenses that slightly exceeded revenue during the year. The example highlights the importance of realistic revenue planning and diversified income streams when evaluating future food system investments.

Interviews conducted for this study echoed similar concerns. Food hub operators consistently cited thin margins, working capital constraints, and the difficulty of sustaining operations through aggregation and distribution activities alone. Several emphasized the importance of developing multiple revenue streams and value-added services capable of generating additional income.

Many successful food hubs supplement distribution activities with services that generate revenue while advancing broader food system goals. Several opportunities appear particularly relevant to the Greater Lehigh Valley:

- Food-as-Medicine and produce prescription programs continue to expand nationally as healthcare providers recognize the relationship between nutrition and health outcomes. These programs create opportunities to connect local producers with healthcare systems while improving food access for vulnerable populations. Nationally, more than one-third of food hubs report interest in expanding nutrition incentive, produce prescription, and food box programs, suggesting growing recognition of these initiatives as both community health interventions and potential revenue streams.
- Corporate and workplace CSA programs represent another opportunity to expand markets for local producers while improving employee access to fresh food. Existing programs such as St. Luke's employee CSA demonstrate how large employers can create consistent demand for regional farms while supporting workforce wellness initiatives.
- If a centralized food hub facility is ultimately pursued, shared-use and commissary kitchen space could serve as both a community asset and a supporting revenue stream. Such facilities can provide licensed production space for food entrepreneurs, food truck operators, caterers, and emerging food businesses while supporting value-added product development, small-batch processing, and product testing.
- Co-packing and contract manufacturing services represent another promising opportunity. As demonstrated by The Farmstead Table, Apple Ridge Farm's Collective Culture brand, and the Primordia product development pilot, many producers are interested in developing value-added products but lack access to processing equipment, technical expertise, or regulatory support. Providing co-packing, product development, and technical assistance services could create new revenue streams while helping local producers capture more value from their products.

Taken together, these opportunities suggest that a future food hub may be most successful when viewed not simply as a distribution business, but as a platform providing multiple services that support producers, buyers, food entrepreneurs, and community partners. Nationally, many food hubs continue to struggle with thin margins, rising operating costs, and dependence on grant funding. The most resilient models are often those that generate revenue through multiple activities rather than relying solely on aggregation and distribution.

For the Greater Lehigh Valley, opportunities such as co-packing, product development, workplace CSA coordination, and Food-as-Medicine initiatives represent potential pathways for generating revenue while addressing needs identified throughout this

assessment. These activities may help diversify income streams while strengthening market opportunities for local producers.

At the same time, producer readiness services—including GAP certification assistance, food safety training, forecasting support, and packaging guidance—can help farms meet the requirements of institutional and wholesale markets. While these services may not generate significant revenue on their own, they strengthen the producer capacity needed to support long-term growth. More importantly, many of the opportunities described above can be tested and refined before significant infrastructure investments are pursued, allowing the region to evaluate demand, build relationships, and develop sustainable business models before committing to larger capital projects.

4.7 Strategic Implications

A consistent theme emerged throughout this assessment: the Greater Lehigh Valley possesses many of the assets needed to strengthen its regional food system, but those assets are not always connected in ways that maximize their collective impact. Producers, buyers, processors, distributors, educational institutions, food access organizations, and community partners all identified opportunities for growth, yet many also described challenges related to coordination, market access, processing capacity, and supply chain development.

The findings suggest that the region's greatest opportunity may lie in strengthening the functions that connect existing assets rather than focusing exclusively on the development of new infrastructure. In many cases, producers are already growing products that buyers want to purchase. Educational institutions are exploring workforce development and food processing opportunities. Distributors have expressed interest in sourcing additional local products. Processors and food entrepreneurs are seeking regional supply. The challenge is not a lack of activity, but a lack of coordination.

This finding has important implications for future food hub development. While a centralized facility may ultimately play a role, the strongest opportunities identified through this assessment involve strengthening producer readiness, expanding processing capacity, supporting value-added production, coordinating procurement, and developing the relationships needed to move products efficiently through the supply chain. These functions can be tested, refined, and expanded through pilot activities before major infrastructure investments are pursued.

Ultimately, the findings suggest that the next phase of regional food system development should focus on implementation. Many of the opportunities identified through this assessment are already supported by interested partners, existing assets, and demonstrated market demand. The question moving forward is not whether opportunities exist, but how the region chooses to coordinate and invest in them.

CHAPTER 5. FINAL THOUGHTS

5.1 Recommended Phased Implementation Strategy

The findings of this assessment support a phased approach to food system development. Rather than pursuing a large-scale infrastructure project immediately, the evidence suggests that the Greater Lehigh Valley may benefit from first strengthening the food hub functions identified throughout this study, including procurement coordination, producer readiness, value-added processing, market development, and institutional purchasing.

The recommended approach emphasizes testing and refinement before major capital investment. Through initiatives such as the proposed Regional Food System Partnership, Grow NORCO, Food Policy Council development, procurement pilots, and educational partnerships, the region has an opportunity to evaluate demand, strengthen relationships, and build operational experience while reducing financial risk.

This phased strategy recognizes that the most appropriate long-term organizational structure and infrastructure investments cannot be determined fully in advance. Instead, they should emerge from demonstrated market demand, successful pilot activities, and lessons learned through implementation. By focusing first on coordination, market development, and strategic investments in the "missing middle," the region can create a stronger foundation for future food hub functions while maintaining flexibility as opportunities evolve.

The implementation priorities identified in the Executive Summary provide a roadmap for advancing these efforts over the next one to five years.

5.2 Governance and Leadership Considerations

Throughout this assessment, stakeholders consistently emphasized the importance of coordination. While infrastructure, processing, procurement, and distribution emerged as significant opportunities, nearly every strategy identified through this study depends upon sustained leadership and a mechanism for aligning partners around shared goals.

The re-establishment of the Lehigh Valley Food Policy Council presents a unique opportunity to provide that coordination. As a cross-sector body representing agriculture, food access, public health, education, economic development, and community stakeholders, the Council can serve as a forum for strategic planning, partnership development, policy discussions, and evaluation of future food system investments. In many ways, the Food Policy Council may represent the long-term governance backbone needed to support continued food system development in the region.

The Council also builds upon several years of stakeholder engagement and planning. Through the Blue Zones Project Lehigh Valley discovery and summit processes, more than

300 residents, community leaders, and stakeholders participated in interviews, focus groups, and community meetings to identify priorities for improving regional health and well-being. Strengthening the regional food system—including development of a food hub and re-establishment of a Food Policy Council—emerged as two of the highest-priority strategies identified through that process. Subsequent investments in food hub planning, Food Policy Council development, partnership building, and the proposed RFSP initiative have further strengthened the foundation for implementation.

In the near term, Buy Fresh Buy Local–Greater Lehigh Valley is well positioned to serve as a convening and administrative partner while the Food Policy Council is established and governance structures mature. Through its relationships with producers, institutions, community organizations, and regional partners, BFBL has already played a central role in stakeholder engagement, producer outreach, procurement initiatives, and food system planning. This existing capacity can help bridge the transition from planning to implementation.

At the same time, governance and operations are not the same. While the Food Policy Council can help establish priorities and coordinate stakeholders, implementation activities such as procurement pilots, producer engagement, contract management, invoicing, reporting, and logistics coordination will require an operational lead. Identifying the organization or partnership best suited to perform these functions may be one of the most important near-term decisions facing the region.

The findings suggest that a phased approach is most appropriate. Rather than creating a standalone food hub organization immediately, the region may benefit from testing procurement, processing, and market development activities through existing organizations and collaborative partnerships. This approach allows stakeholders to build operational experience, evaluate demand, strengthen relationships, and refine governance structures before making significant investments in dedicated facilities or new entities. Lessons learned through these efforts can help determine whether future growth is best supported through a virtual food hub, cooperative model, nonprofit organization, social enterprise, or another organizational structure.

5.3 Conclusion

The Greater Lehigh Valley has spent more than a decade studying opportunities to strengthen its regional food system. During that time, stakeholders have repeatedly identified many of the same challenges: limited processing capacity, gaps in aggregation and distribution, barriers to institutional procurement, and the need for stronger coordination across the supply chain. This assessment confirms those findings while also demonstrating that the region possesses many of the assets needed to address them.

What makes this moment different is the level of alignment that now exists among regional partners. The proposed Regional Food System Partnership, the re-establishment of the

Lehigh Valley Food Policy Council, the Grow NORCO initiative, ongoing food access efforts, educational partnerships, and growing interest from producers, buyers, processors, and community organizations together create a unique opportunity to move from planning toward implementation.

The findings of this study suggest that the path forward does not begin with a single facility or organization. It begins with relationships, coordination, and strategic investments that strengthen the connections between producers, buyers, processors, educators, distributors, and community partners. By building on existing assets, testing new approaches, and expanding successful models over time, the region can reduce risk while creating meaningful opportunities for farmers, institutions, businesses, and residents.

The opportunities identified throughout this assessment already exist. The challenge now is to act on them. With the partnerships, momentum, and investment currently taking shape across the region, the Greater Lehigh Valley is well positioned to strengthen its food system in ways that support farm viability, improve food access, expand economic opportunity, and create lasting benefits for the communities it serves.

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Appendix A. Implan Methodology & Maps

NNC LV Food Hub Feasibility Study – IMPLAN report

May 2026

Food Hub Model: **Centralized**

Data inputs: **Total output: \$3,295,000** **Employment: 7** **Employment Compensation: \$494,250**

Recommendations from [USDA Running a Food Hub: Assessing Financial Viability](#):

- \$2,400,000 in annual sales needed for viability (pg. 26), adjusted for inflation to \$3,295,000 using [Bureau of Labor Statistics CPI Inflation Calculator](#).
- 6.27 FTE recommended for viability sales level (pg. 21). Total employee compensation allowance calculated at 7.27; rounded down to 7 to provide conservative buffer in case employee compensation estimate is low.

Recommendations from Wallace Center [Financial Management for Food Hubs](#) Benchmark Study Report:

- model hubs spend about 15% of sales on labor and related costs (pg. 17). 15% of \$3,295,000 is \$494,250, which allows for 7.27 FTE at \$68,000 each.

Employee compensation of \$68,000/FTE estimate based on:

- [MIT Living Wage Calculator for Northampton County](#)
- Estimates for workers comp, payroll taxes, unemployment insurance, and employer HRA contribution

Multiplier = 1.91 (based on IIA – Viability Combined Region + PA + MRIO on page 4)

Direct Output \$3,295,000 + Indirect/Induced \$3,022,298.86 = \$6,317,298.86 / \$3,295,000 = 1.917

An economic multiplier of 1.91 means that for every \$1 of direct spending on this project, an additional \$0.91 of economic activity is created in the local economy, resulting in a total impact of \$1.91.

Notes about use of customized region which includes Berks, Carbon, Lehigh, Northampton, Monroe, and Schuylkill Counties:

- When the 6 counties are combined, the region is treated as more self-contained, so less spending leaks out and more is captured locally. This leads to higher total output.
- When the counties are separate and the event is placed in one, more spending leaks to other regions (including the neighboring counties), which reduces the total impact captured in that location.

- Even with MRIO on, how the regions are defined and where the event is placed still affects how much activity is retained vs. distributed

IIA = Industry Impact Analysis

ICA = Industry Contribution Analysis

IIA NorCo Only

Economic Indicators by Impact					⋮
Impact	^	Employment	Labor Income	Value Added	Output
1 - Direct		8.01	\$523,605.55	\$1,464,322.01	\$3,295,000.00
2 - Indirect		7.11	\$422,186.55	\$614,728.37	\$1,098,984.32
3 - Induced		2.44	\$133,477.13	\$265,478.45	\$423,723.91
Totals		17.56	\$1,079,269.23	\$2,344,528.84	\$4,817,708.23

IIA NorCo – Output Only (no labor data used – note difference in IMPLAN’s labor assumptions)

Economic Indicators by Impact					⋮
Impact	^	Employment	Labor Income	Value Added	Output
1 - Direct		10.92	\$911,005.21	\$1,720,223.53	\$3,295,000.00
2 - Indirect		6.11	\$363,171.16	\$528,798.50	\$945,362.69
3 - Induced		3.46	\$189,107.45	\$376,119.67	\$600,267.47
Totals		20.49	\$1,463,283.82	\$2,625,141.70	\$4,840,630.15

IIA/ICA Trick - Viability Counties Kept Separate + MRIO (both events in NorCo)

Economic Indicators by Impact					
Impact	^	Employment	Labor Income	Value Added	Output
1 - Direct		8.01	\$523,605.82	\$1,464,322.54	\$3,295,001.00
2 - Indirect		8.93	\$643,943.68	\$910,455.79	\$1,586,100.62
3 - Induced		4.24	\$242,602.86	\$465,114.82	\$743,267.08
Totals		21.18	\$1,410,152.36	\$2,839,893.14	\$5,624,368.70

IIA/ICA Trick - Viability Counties Kept Separate + PA + MRIO (both events in NorCo)

Economic Indicators by Impact					
Impact	^	Employment	Labor Income	Value Added	Output
1 - Direct		8.01	\$523,605.82	\$1,464,322.54	\$3,295,001.00
2 - Indirect		9.54	\$706,177.93	\$1,026,158.91	\$1,812,944.58
3 - Induced		4.78	\$280,062.37	\$531,746.52	\$850,475.50
Totals		22.33	\$1,509,846.13	\$3,022,227.97	\$5,958,421.08

IIA/ICA Trick - Viability Combined Region

Economic Indicators by Impact					
Impact	^	Employment	Labor Income	Value Added	Output
1 - Direct		8.07	\$567,111.25	\$1,476,235.40	\$3,295,001.00
2 - Indirect		8.71	\$631,640.03	\$886,652.78	\$1,521,626.63
3 - Induced		4.76	\$289,396.70	\$525,657.60	\$853,843.27
Totals		21.53	\$1,488,147.99	\$2,888,545.78	\$5,670,470.91

IIA/ICA Trick - Viability Combined Region + NorCo Separate + MRIO (both events in NorCo)

Economic Indicators by Impact					
Impact	^	Employment	Labor Income	Value Added	Output
1 - Direct		8.01	\$523,605.82	\$1,464,322.54	\$3,295,001.00
2 - Indirect		9.05	\$636,343.43	\$903,517.54	\$1,590,727.89
3 - Induced		4.21	\$239,949.87	\$460,587.33	\$737,594.08
Totals		21.27	\$1,399,899.12	\$2,828,427.41	\$5,623,322.98

IIA/ICA Trick - Viability Combined Region+ PA + MRIO (5.48% difference between this and separate counties)

Economic Indicators by Impact					
Impact	^	Employment	Labor Income	Value Added	Output
1 - Direct		8.07	\$567,111.25	\$1,476,235.40	\$3,295,001.00
2 - Indirect		10.10	\$751,538.42	\$1,100,658.30	\$1,925,629.60
3 - Induced		5.87	\$366,195.99	\$662,274.24	\$1,073,685.87
Totals		24.04	\$1,684,845.67	\$3,239,167.94	\$6,294,316.47

IIA Viability Counties Kept Separate + MRIO (event in NorCo)

Economic Indicators by Impact					
Impact	^	Employment	Labor Income	Value Added	Output
1 - Direct		8.01	\$523,605.55	\$1,464,322.01	\$3,295,000.00
2 - Indirect		8.99	\$648,993.42	\$920,874.27	\$1,606,021.09
3 - Induced		4.28	\$245,505.49	\$470,380.04	\$752,638.56
Totals		21.28	\$1,418,104.46	\$2,855,576.32	\$5,653,659.65

IIA Viability Counties Kept Separate + PA + MRIO (event in NorCo)

Economic Indicators by Impact					⋮
Impact	^	Employment	Labor Income	Value Added	Output
1 - Direct		8.01	\$523,605.55	\$1,464,322.01	\$3,295,000.00
2 - Indirect		9.61	\$711,458.23	\$1,037,092.94	\$1,833,937.34
3 - Induced		4.82	\$283,140.52	\$537,323.94	\$860,349.30
Totals		22.44	\$1,518,204.30	\$3,038,738.89	\$5,989,286.64

IIA Viability Combined Region

Economic Indicators by Impact					
Impact	^	Employment	Labor Income	Value Added	Output
1 - Direct		8.07	\$567,110.97	\$1,476,234.88	\$3,295,000.00
2 - Indirect		8.74	\$634,129.76	\$890,860.29	\$1,529,446.17
3 - Induced		4.82	\$293,764.11	\$533,198.42	\$867,318.86
Totals		21.63	\$1,495,004.84	\$2,900,293.60	\$5,691,765.03

IIA - Viability Combined Region + NorCo Separate + MRIO (event in NorCo)

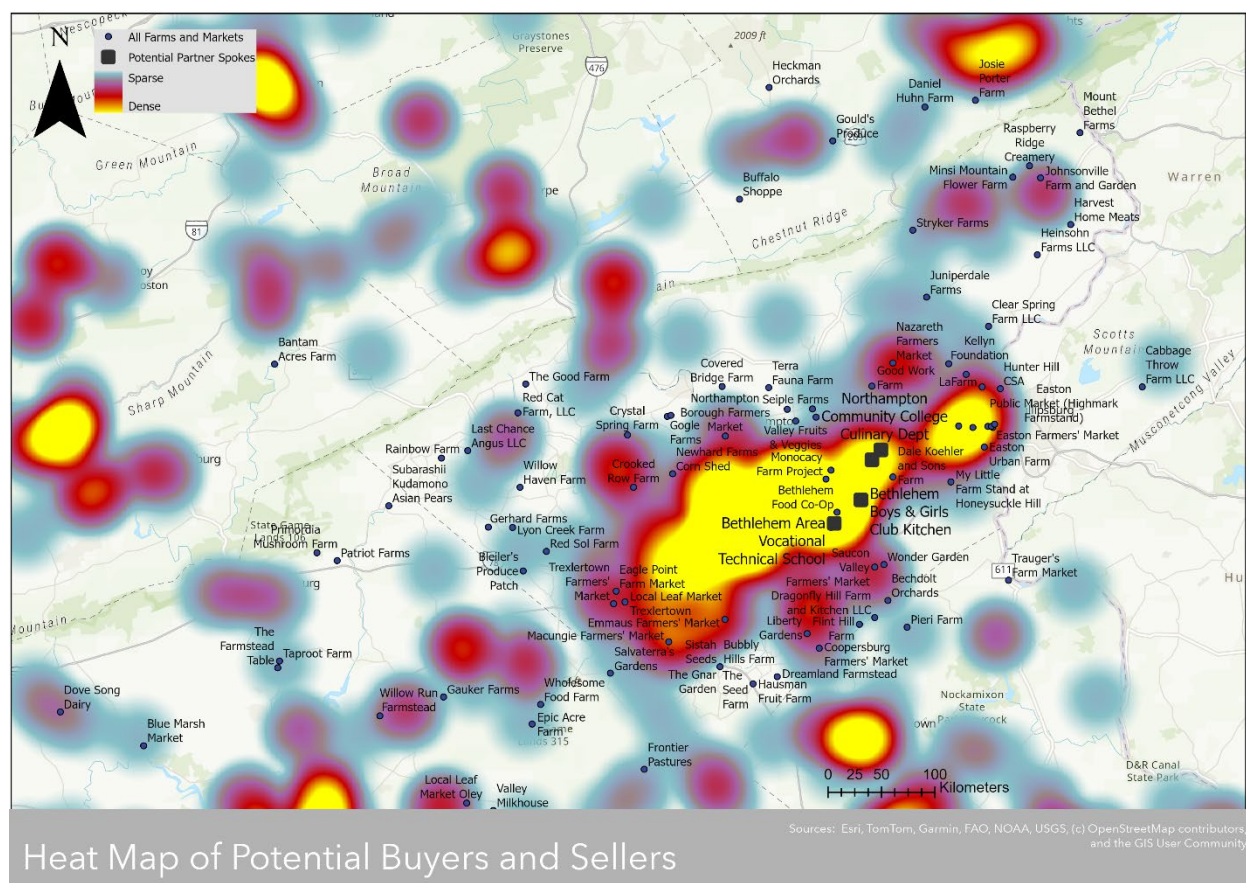
Economic Indicators by Impact					
Impact	^	Employment	Labor Income	Value Added	Output
1 - Direct		8.01	\$523,605.55	\$1,464,322.01	\$3,295,000.00
2 - Indirect		9.09	\$640,263.99	\$911,308.28	\$1,605,363.28
3 - Induced		4.25	\$242,690.38	\$465,559.39	\$746,472.11
Totals		21.36	\$1,406,559.91	\$2,841,189.68	\$5,646,835.39

IIA – Viability Combined Region + PA + MRIO (5.3% difference between this and separate counties)

Economic Indicators by Impact					
Impact	^	Employment	Labor Income	Value Added	Output
1 - Direct		8.07	\$567,110.97	\$1,476,234.88	\$3,295,000.00
2 - Indirect		10.14	\$754,334.16	\$1,105,312.17	\$1,934,241.08
3 - Induced		5.93	\$370,875.82	\$670,370.24	\$1,088,057.78
Totals		24.14	\$1,692,320.96	\$3,251,917.29	\$6,317,298.87

IIA – Viability Combined Region + PA + MRIO w/out using labor inputs

Shows higher total induced output, higher labor income, higher value added, but lower total output than when labor inputs are used for modeling.



Appendix B. Meetings and Interviews

Organization	Interviewee / Presenter	Title / Role
Avellana Agroforestry Cooperative	Edward Clerico	Founder
Bethlehem Area Vocational-Technical School	Adam Lavarchak	Administrative Representative
Bethlehem Area Vocational-Technical School	Scott Ferry	Culinary Instructor
Bethlehem Area Vocational-Technical School	Dana Huber	Supervisor of Adult and Continuing Education
City of Easton	John Kingsley	Director of Community & Economic Development
Food Dignity Movement	Clancy Harrison	Executive Director

Freshlist	Anthony Mirisciotta	CEO
Metz Culinary Management	Andrew Chandler	Vice President, K-12
Metz Culinary Management	Chad Rockovits	Division Vice President, K-12
Metz Culinary Management	Scott Signorello	General Manager & Executive Chef, Lehigh Valley Academy Regional Charter School
National Organic Farming Association of New Jersey (NOFA-NJ) / Farmers' Process	Devin Cornia	Executive Director
Northampton Community College	Elizabeth Bughais	Vice Provost
Northampton Community College	Dominick Lombardo	Director of Culinary Arts
Northampton County Dept. of Community & Economic Development	Tina Smith	Director
Penn State Extension	Brian Moyer	Extension Program Specialist, Horticulture and Local Food Systems
Pennsylvania Co-Operative Potato Growers	Nathan Tallman	CEO
Pennsylvania Department of Agriculture	Dr. Jamie Green	Director, Eastern Region and Special Advisor for Urban Agriculture
Pennsylvania Department of Agriculture	Heidi Secord	Deputy Secretary for Farm, Food and Market Access
Pennsylvania Department of Labor & Industry	Chelsie Pineiro Cordero	Apprenticeship and Training Representative
Pomptonian Food Service	William Gonzalez	Purchasing Manager
Vibrant City	Rathi Niyogi	CEO
Red Tomato	Angel Mendez	Executive Director
River Valley Community Grains	Larry Mahmarian	Co-owner
Rodale Institute	Dan Kemper	Master Trainer, RIFT Program
Rutgers University Hazelnut Project	Dr. Thomas Molnar	Associate Professor, School of Environmental and Biological Sciences
Sysco	Jeremy Bialker	Sales Manager, Lehigh Valley
Team Pennsylvania	Kelly Kundratic	Agricultural Director
PASA Sustainable Agriculture	Webinar: The Farm-to-School Movement	Supplemental Research Source

In addition to the meetings and interviews listed above, findings were informed by numerous conversations with farmers, producers, market managers, food entrepreneurs, community partners, and other stakeholders conducted throughout the study process.

Additional Research and Engagement Activities

Additional insights were gathered through participation in educational programs, presentations, conferences, webinars, listening sessions, and stakeholder discussions related to regional food systems and food hub development. These included participation in a social entrepreneurship course at Lafayette College, where student teams explored food hub development opportunities in the Greater Lehigh Valley as part of applied research and community engagement projects.

The study team also participated in the Pennsylvania Economic Development Association (PEDA) Annual Conference in 2026 and presented as part of the Pennsylvania Department of Agriculture-sponsored session, *Rooted in Opportunity: Agricultural Business Development as a Catalyst for Regional Economic Growth*. Additional perspectives were gained through participation in stakeholder listening sessions supporting development of the Pennsylvania Department of Agriculture's Food Action Plan, as well as a regional food systems think tank presented by Food Dignity Movement and hosted by King's College that brought together practitioners, educators, nonprofit leaders, and food system stakeholders to discuss emerging opportunities and challenges facing local and regional food systems.