Department *of* Agriculture and Food

Utah Food Systems Study

Summer 2026

FOREWARD

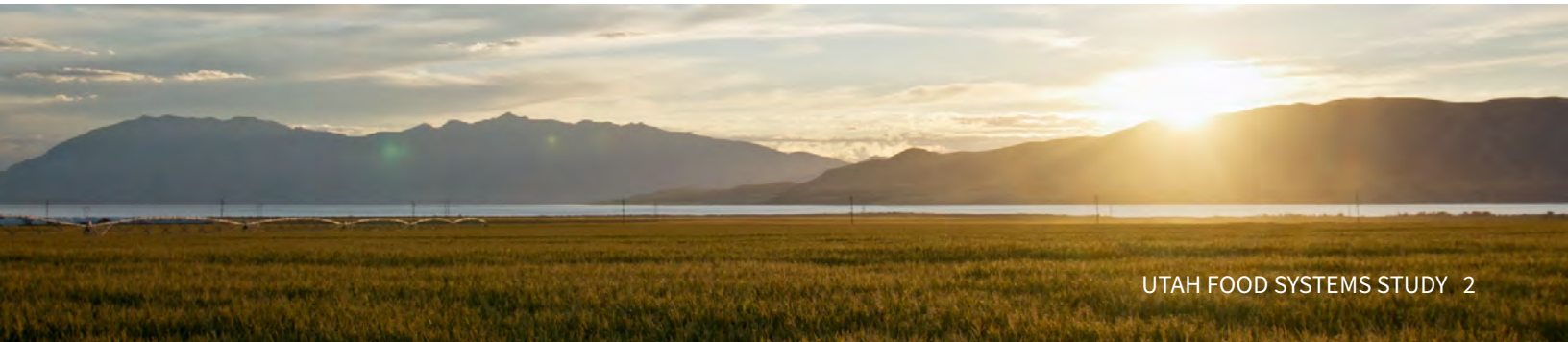
Agriculture is a cornerstone of Utah's economy, heritage, and way of life. Our farmers, ranchers, and food businesses work every day to feed communities, care for the land, and keep agriculture strong for the next generation. Through H.B. 510, this study was commissioned to better understand the current realities, challenges, and opportunities facing Utah agriculture and our local food system. The findings reflect both the strength of our agricultural industry and the pressures many producers and businesses are navigating, from infrastructure and workforce challenges to rising costs and market barriers.

One thing that stood out throughout this process was the level of engagement from producers and industry partners across the state. Even during a difficult time for many in agriculture, Utah's agricultural community continues to show resilience, innovation, and a strong commitment to keeping farms and ranches viable. At UDAF, our goal is simple: we want to keep farmers farming. We want to help create opportunities that give producers hope, support long-term sustainability, and strengthen the infrastructure and partnerships that help agriculture succeed.

This report is intended to serve as a resource to guide future collaboration, investment, and decision-making in ways that are practical, achievable, and aligned with Utah's agricultural priorities. The recommendations included here were shaped by research and by the experiences and input of producers, businesses, institutions, and organizations throughout Utah. We are grateful to everyone who contributed their time and perspective to this effort, and we look forward to continuing the work together to support Utah agriculture and the communities that depend on it.

Kelly Pehrson

Kelly Pehrson, Commissioner



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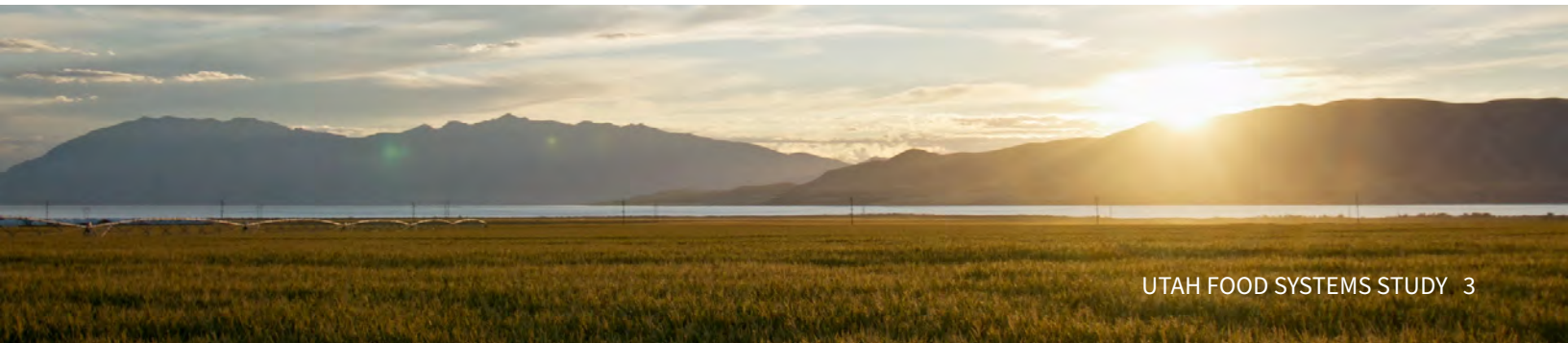

ACKNOWLEDGMENTS

The Utah Food Systems Study is led by the Utah Department of Agriculture and Food (UDAF) in partnership with an advisory committee made up of representatives from agriculture, food businesses, nonprofits, institutions, and other key partners across the state. The study was directed by and funded through 2025 Utah H.B. 510 Agricultural Amendments. New Venture Advisors was contracted by UDAF through a competitive procurement process to conduct the study and support the research, analysis, and stakeholder engagement process. Over the course of the study, dozens of producers, businesses, organizations, and other stakeholders from from every county in Utah have shared their perspectives through surveys, listening sessions, interviews, and advisory committee workshops. Their input has helped identify the barriers, opportunities, and priorities that are shaping this study and its recommendations for strengthening Utah's agricultural and food system.

This study was supported by the U.S. Department of Agriculture's (USDA) Agricultural Marketing Service Resilient Food Systems Infrastructure (RFSI) Program, administered by the Utah Department of Agriculture and Food under Federal Agreement No. 23RFSIUT0042-00. Any opinions, findings, conclusions, or recommendations expressed in this publication are those of the authors and do not necessarily reflect the view of the USDA.

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EXECUTIVE SUMMARY

Utah's agricultural sector plays a vital role in the state's economy, rural communities, and food system. In response to H.B. 510 Agricultural Amendments, the Utah Department of Agriculture and Food (UDAF), with support from New Venture Advisors, conducted a statewide study to better understand local food availability, economic conditions and opportunities, barriers to entering the agricultural workforce, and food supply chain gaps. The study combined public data analysis, mapping, economic analysis, and statewide engagement to identify key gaps, opportunities, and priorities for strengthening Utah's agricultural and food system.

WHAT THE STUDY FOUND

The findings show that Utah has a strong agricultural base, but one that is changing. Livestock is the dominant driver of Utah agriculture, accounting for nearly 70 percent of agricultural product sales. The state's production system also depends heavily on alfalfa and other hay crops that support the livestock sector. Utah agriculture remains primarily family based, with 94 percent of farms classified as family owned. At the same time, the sector faces growing pressure from land conversion, an aging producer base, and limited farm income.

The study also found meaningful opportunities to strengthen local and regional food markets. Direct-to-consumer sales remain important in some parts of the state, especially near population centers and tourism destinations, while direct-to-wholesale sales increased between 2017 and 2022. Although a large percentage of school food authorities report some level of farm-to-school participation, many purchases remain limited in volume or frequency. Stakeholders identified significant opportunities to strengthen producer-to-school connections and expand institutional purchasing of Utah-grown products through improved coordination, infrastructure, and supply chain support. Programs such as Utah Farm to Fork (the Utah-specific farm-to-school program that facilitates network organization and provides a resource hub for producers), Double Up Food Bucks, the Utah Food Security Grant Program, and the USDA Regional Food Systems Infrastructure program are helping connect producers to buyers, improve food access, and expand infrastructure.

Despite these efforts, there are major gaps in processing, storage, aggregation, and distribution infrastructure. Utah has only one fresh produce processing facility statewide, limited organic grain cleaning capacity, very few equipment cooperatives for small- and mid-sized farms, and no established food hubs currently operating at scale. Co-packing capacity is also limited, and cold storage is concentrated in urban areas, leaving major gaps in rural production regions. These constraints make it harder for Utah producers and food businesses to expand beyond direct sales, access wholesale and institutional markets, and keep more food dollars circulating within the state.

The economic analysis confirmed the scale of these infrastructure needs. It identified an estimated $80–95 million in targeted agricultural infrastructure investment that could help address gaps limiting producers' access to value-added markets, price premiums, and institutional buyers. The analysis grouped these needs into two tiers. Tier 1 includes smaller and mid-scale investments such as co-packing, fresh produce processing, regional cold storage, organic grain cleaning, and equipment cooperatives. Tier 2 includes larger investments in meat, dairy, grain, and fruit processing facilities. At full build-out, this investment framework is estimated to support 783 construction-phase jobs, 383 permanent annual jobs, and more than $107 million in annual economic activity from processing facilities alone. Because infrastructure needs vary across Utah, the study recommends a regionally tailored approach and identifies counties best aligned for larger processing facility development.

An additional crop diversification analysis examined the economic parameters of diversification opportunities alongside and in rotation with existing crops, using alfalfa as the baseline because of its broad presence and central role in Utah agriculture. The analysis modeled low, median, and high scenarios for each crop using USDA NASS observed price and yield ranges (2021–24), applying a consistent methodology across all crops. Alfalfa is profitable at median observed prices and yields, with commodity/standard established stands generating an estimated +$327/acre net return at the 2021–24 USDA NASS–observed midpoint and yields (+$787/acre in strong years), while premium/supreme-grade dairy-quality hay generates +$644/acre at median and +$947/acre in strong years. The analysis makes this range visible alongside the evaluated potential crops. The analysis found that certain crops (or combinations of crops) may be economically promising as diversification tools under the right conditions. However, realizing those opportunities depends on access to buyers, processing, storage, equipment, and working capital that are not consistently available across Utah. The findings also underscore alfalfa's importance to Utah's livestock and dairy sectors and show that any large-scale shift affecting feed supply could have broader effects on livestock-related industries. Overall, this analysis reinforces the report's broader conclusion that infrastructure and market access are essential to whether producers can realistically pursue expansion, product development, new markets, or crop diversification.

WHAT STAKEHOLDERS SHARED

Statewide engagement added an important on-the-ground perspective to the research and reinforced the study findings. Through extensive engagement, participants from across Utah described a food system with strong assets but also persistent barriers. Three key themes emerged:

- **Local market demand and access:** Local food availability is uneven across Utah, shaped by inconsistent demand, limited market pathways, and supply chain gaps that make it harder for producers to get Utah-grown food to Utah buyers.
- **Farm and food business viability:** The financial viability of Utah producers and food businesses is under strain due to development pressure, limited access to capital and working capital, and workforce challenges, making it harder to adapt, reinvest, and grow beyond direct-to-consumer markets.
- **Program, policy, and institutional fit:** Producers and food businesses often face barriers to accessing and benefiting from agricultural supports and systems because they are not always designed around the realities of day-to-day farm and food business operations.

STRATEGIES AND NEXT STEPS

The twelve strategies in this report respond to the main challenges identified through both the research and engagement process. They focus on practical ways to strengthen Utah's agricultural economy, support producers and food businesses, and improve how local food moves through the supply chain. The strategies fall into two categories: **programming strategies**, which focus on improving or expanding programs, services, staffing, and coordination, and **funding strategies**, which focus on investment and financing tools that provide direct support to producers, food businesses, and key partners. Many build on existing efforts, while others introduce new approaches to address gaps and strengthen Utah's agricultural system.

A next phase for UDAF and its partners is to use these strategies to guide implementation planning, including identifying near-term actions, clarifying partner roles, and aligning funding and staffing needs. Regular coordination among state agencies, counties, educational institutions, and agricultural organizations will be important to improve communication, reduce duplication, strengthen alignment across programs and funding opportunities, and respond more effectively to emerging needs and opportunities. As implementation moves forward, UDAF and its partners can use the study findings and strategy framework to guide work planning, collaboration, and future investment decisions. Ongoing tracking of outcomes will be important to show progress, improve programs over time, and support continued public and private investment.

Utah has important assets to build on, including generations of agricultural knowledge, deep commitment to the land, and strong communities invested in the future of agriculture. The findings and recommendations in this report are intended to strengthen existing efforts and help guide future programs, partnerships, and investments that support the long-term future of Utah agriculture.

STUDY OVERVIEW

In fall 2025, Utah Department of Agriculture and Food (UDAF) began a seven-month research study, supported by NVA, to assess gaps and opportunities in the current Utah food system as directed by H.B. 510 Agricultural Amendments.

The deliverables of this bill included a report of findings and recommendations on four key components:

> "39 (i) the intrastate food supply chain;
>
> 40 (ii) crop production and optimization;
>
> 41 (iii) the agricultural workforce; and
>
> 42 (iv) the capital funding of local food production."

The study included extensive data collection and analysis of agricultural production, market conditions, mapping, and food system infrastructure. Central to the research process, extensive stakeholder research was conducted across the state to engage a wide range of representation of Utah's food system. This included engaging new and existing partnerships with local farmers and ranchers, processors, distributors, and community organizations leading the movement of the Utah food system. Stakeholder engagement was carried out in several ways:

- **Advisory committee:** an essential group of twenty-five stakeholders, critical to guiding the engagement plan, reviewing stakeholder input, and refining goals and actions
- **Surveys:** two surveys reaching producer and supply chain operators, gathering insight from nearly 200 individuals to assess current gaps and opportunities
- **Listening sessions:** six virtual listening sessions with thirty-one participants from across different food system sectors discussing barriers and potential solutions strengthen Utah's food system
- **Interviews:** one-on-one calls with twenty-three experts to better understand the work currently being conducted within Utah's food system

Stakeholders shared the challenges they face in producing food and getting it to market, the resources and support they need, and opportunities to help them sustain and grow their operations while increasing local food availability across Utah. Findings from the engagement highlight several key themes in the Utah food system (see the Key Learnings from Stakeholder Engagement section).

These themes are the foundation for the recommended strategies outlined in this study. The strategies were developed through advisory committee workshops, research on case studies from other states and regions, and feedback from the advisory committee and UDAF staff, who weighed the feasibility, practicality, and potential impact of each of the twelve recommendations (see the Recommended Strategies section).

UTAH'S AGRICULTURAL AND SUPPLY CHAIN LANDSCAPE

Utah's agricultural sector plays a vital role in the state's economy, food system, and rural communities. This research uses publicly available data, such as the Census of Agriculture, along with mapping analysis to show the current state of agriculture in Utah, how it is changing, and where there are challenges and opportunities across the food system. Key findings highlight the importance of livestock as a major driver of Utah agriculture, the role of alfalfa as a foundational crop that supports the livestock sector, the dominance of family-owned operations, increasing pressure on agricultural land, and gaps in processing and distribution infrastructure. At the same time, growth in local food initiatives and direct-to-consumer markets presents significant opportunities for strengthening Utah's food system.

The sections that follow provide a snapshot of Utah agriculture today, starting with the state's production base, the people and operations behind it, and the ways land use and market activity are changing over time.

WHAT'S BEING PRODUCED

Utah's agricultural production is centered around livestock, forage crops, and grains. Livestock is a major part of Utah agriculture, with nearly 9,300 farms and ranches producing livestock, poultry, and related products across the state. It also accounts for nearly 74 percent of Utah's $2.7 billion in agricultural product sales (Hilton, 2024). Land used to support livestock, including pastureland and rangeland, accounts for 84 percent of Utah's 10.5 million acres of farmland (USDA NASS, 2022a). Public lands also play an important role in Utah's livestock sector. Utah's Bureau of Land Management manages approximately 1,410 grazing allotments across 22 million acres (BLM).

After pastureland and rangeland that support livestock, hay is the largest crop land use in Utah. Alfalfa and other hay crops play an especially important role because they help support the state's livestock industry. In 2022, Utah had 588,939 acres of hay harvested across 8,006 farms, producing 2,132,214 tons. About 6,803, or 85 percent, of those farms produced alfalfa, accounting for 449,495 acres, or 29 percent of total cropland (USDA NASS, 2022a). Land used for grains, vegetables, and tree fruits is smaller by comparison, though these sectors can still have high value and different production needs. Specialty crop trends are mixed, with growth in some orchard and greenhouse production alongside a modest decline in vegetable acreage. Understanding what Utah produces also requires looking at who is behind that production, including the structure of farms and ranches and the characteristics of the people operating them.

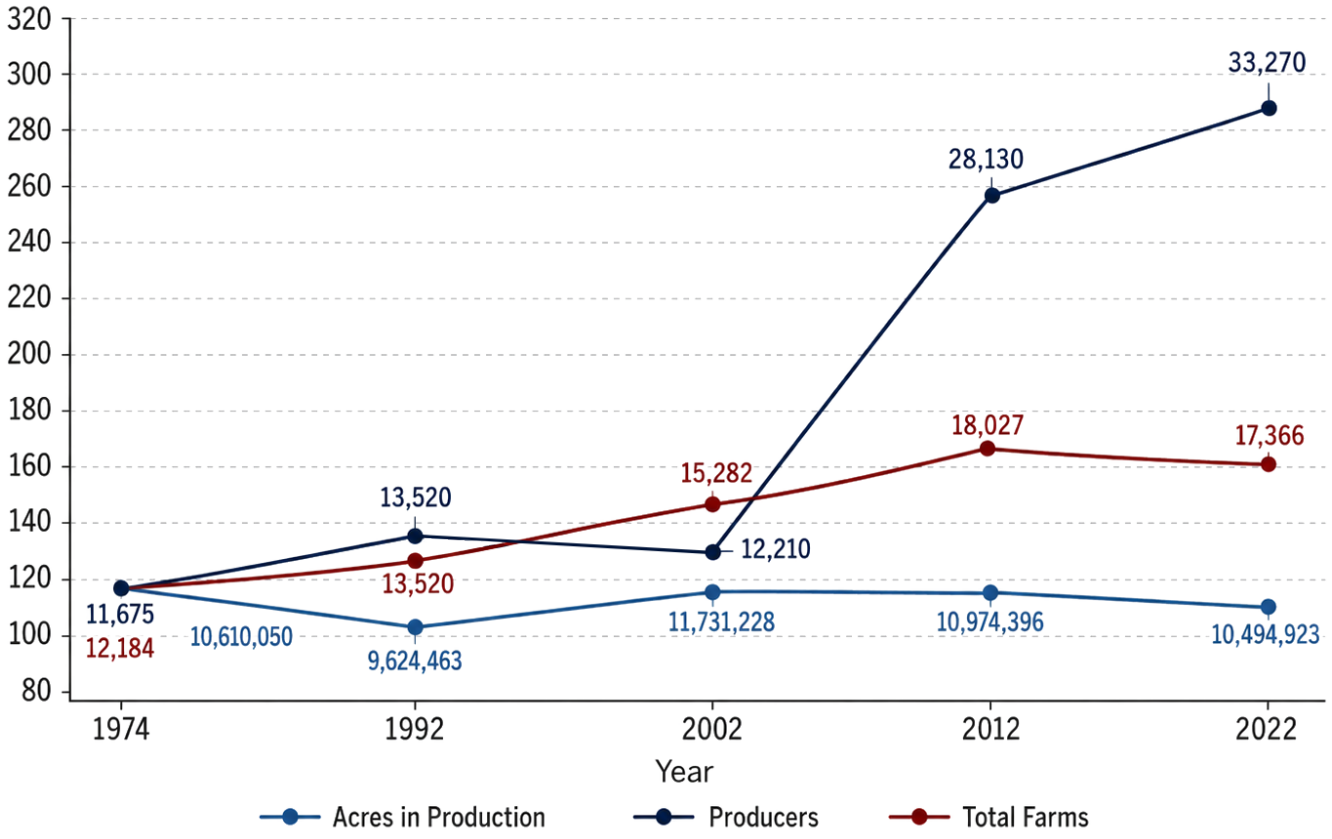
WHO'S PRODUCING

Agricultural production in Utah is primarily driven by family-owned farms and ranches, supported by a large base of individual producers. In 2022, Utah had 17,386 farms, down 6 percent from 2017 (Hilton, 2024). There are approximately 33,270 agricultural producers statewide, with 94 percent of farms classified as family-owned operations. However, only 31 percent of producers report farming as their primary occupation, indicating that a substantial portion of producers rely on off-farm income.

Utah's agricultural workforce is also aging, with an average farmer age of 56.6 years, consistent with national trends (NASS USDA, 2022d). As producers retire, this raises important questions about how farms and ranches will transition in the future, including whether operations will stay in production, remain in family ownership, or change hands or land use. Because only 20 percent of farms hire labor, many operations rely mainly on family labor rather than paid employees. Together, these producer patterns help explain how Utah agriculture functions today, how it is distributed across the state, and how shifts in who is farming may shape the sector over time.

WHERE AGRICULTURE IS LOCATED AND HOW IT IS CHANGING

Agricultural activity in Utah is geographically concentrated in rural counties and valleys where water availability, soil conditions, and climate are most suitable for farming and ranching. In 2022, Utah maintained approximately 10,494,923 acres of land in agricultural production, a 10.5 percent decline from 2002 that reflects long-term pressure from development and other land use changes (NASS USDA, 2022d).



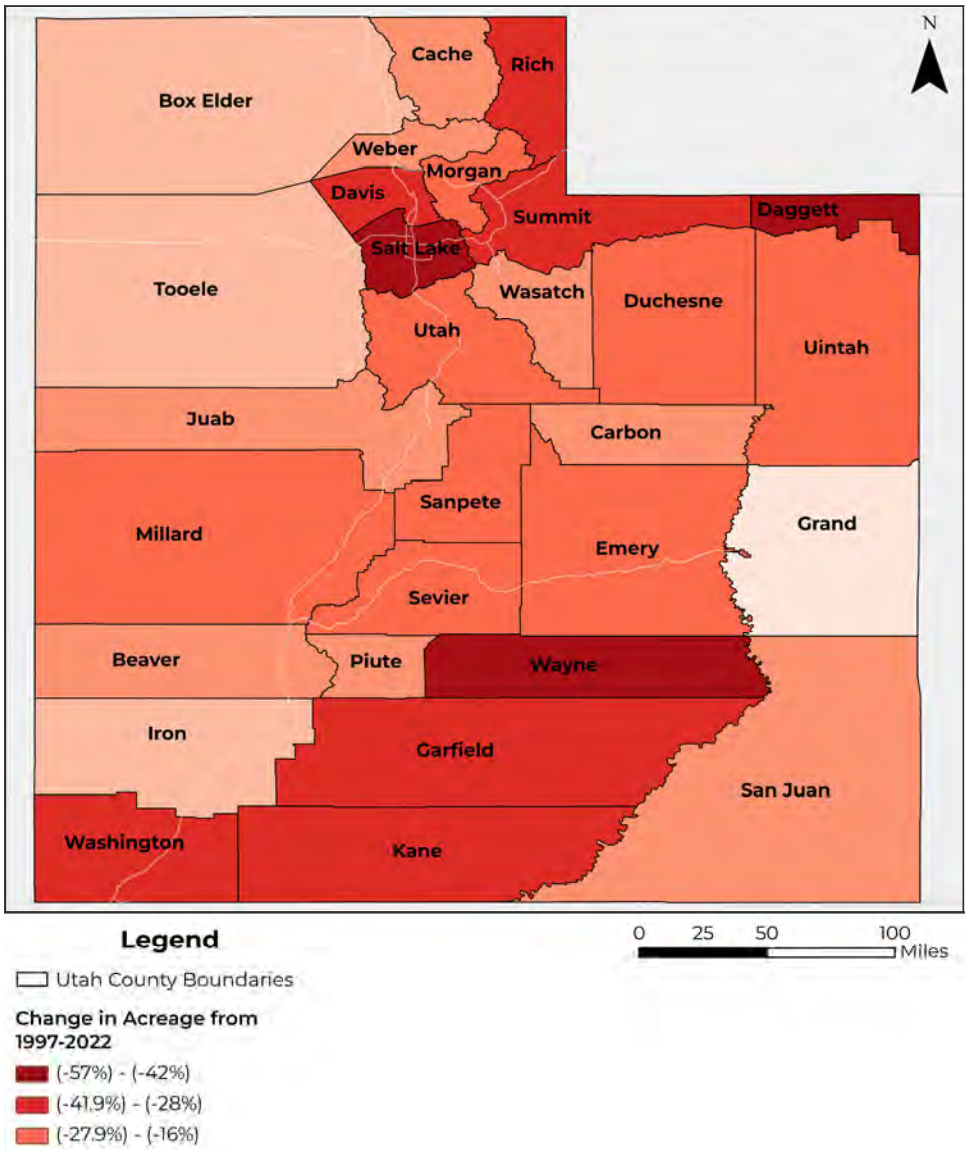
NOTE: Lines are indexed to 1974 = 100 to allow comparison across measures with different scales. Point labels show actual reported values

Chart 1: Utah Producers, Farms, and Acres in Production

Average farm size in Utah is approximately 604 acres, though this varies significantly by region and production type. Smaller farms are typically located near urban areas and focus on specialty crops or direct-to-consumer (DTC) markets, while larger operations dominate rural areas and focus on commodity production.

Utah has experienced a measurable decline in agricultural land over the past two decades. Between 2002 and 2022, the state lost approximately 1.24 million acres of agricultural land, reflecting sustained pressure from urban

MAP 1: Change in Acreage in Production from 1997 - 2022 in Utah



CITATION: U.S. Department of Agriculture, National Agricultural Statistics Service. 2022 Census of Agriculture Accessed on 12/20/2025; U.S. Census Bureau, 2025. 2025 TIGER/Line Shapefiles, Accessed on 12/20/2025.

NOTE: Map created utilizing WGS 1984 Web Mercator (auxiliary sphere) projection

development and land use change. At the same time, the total number of farms increased compared to 2002, pointing to an important structural shift in Utah agriculture. Chart 1 highlights a key structural shift: while the total number of farms has increased over time, total acreage in production has declined, particularly since 2002. This pattern suggests a transition toward more numerous but smaller farms, consistent with land fragmentation and the growth of part-time, small-scale, and specialty operations.

Map 1 (NASS, USDA 2022d) indicates measurable shifts in the number of farms and producers across Utah between 1997 and 2022. While the total number of farms has remained relatively stable in some regions, several counties show declines driven by consolidation and urban development pressures. Other counties, especially those near growing population centers, show increases in smaller operations, suggesting a shift toward part-time farming and more diversified production. These shifts in farm numbers, acreage, and location also highlight the growing pressure on agricultural land and the importance of efforts to protect it.

LAND PRESSURE AND FARMLAND PROTECTION

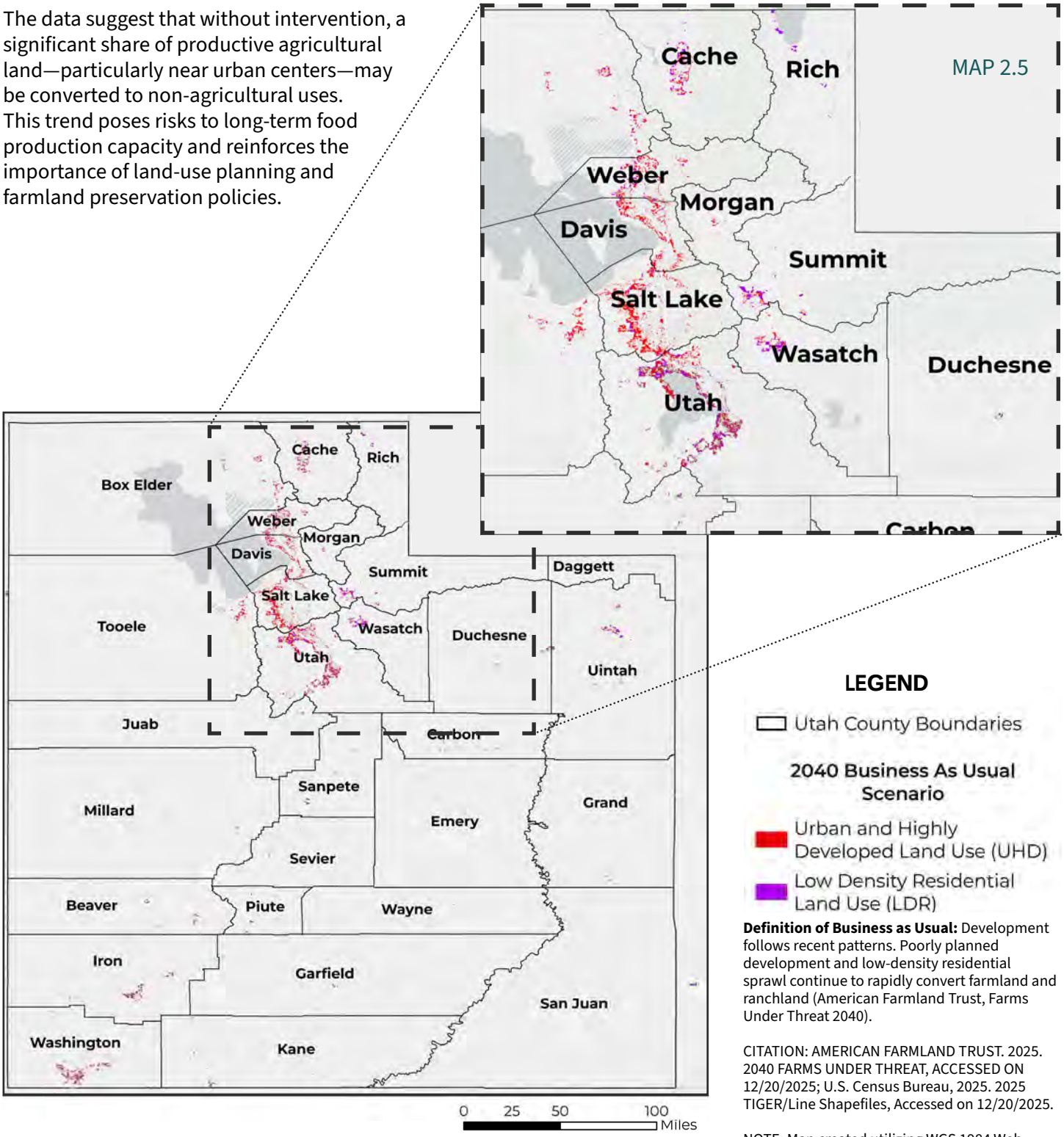
Over the past two decades, Utah has experienced notable changes in agricultural land use. These include shifts in the number of farms, total acreage in production, and types of agricultural activities. While some areas have seen declines in farmland due to urban expansion, others have experienced growth in smaller farms and diversified operations.

In response, Utah has implemented several farmland protection strategies, including conservation easements, open space acquisition, and Agricultural Protection Areas (APAs). In addition to providing technical assistance for individuals and entities pursuing permanent land conservation projects, Utah's Conservation Division within the Utah Department of Agriculture and Food administers the LeRay McAllister Working Farm and Ranch Fund. Established in 1999, the LeRay McAllister Fund has awarded more than $27.4 million in grants to protect nearly 100,000 acres, in which nearly two-thirds account for working agricultural lands (UDAF). At the county level, formal farmland protection programs have also been established in Summit, Cache, Utah, Box Elder, Weber, Sevier, and Sanpete Counties.

These programs play a critical role in slowing land conversion by restricting non-agricultural development and preserving working lands. However, current efforts remain limited in scale relative to the pace of development. While conservation easements have successfully protected select areas, they have not been sufficient to offset the overall decline in agricultural acreage, particularly as rising land values make easements increasingly expensive to finance. According to USDA NASS reports, farm real estate values increased 31 percent over a four year period ($2,680 per acre in 2021 to $3,500 per acre in 2025) in Utah (NASS USDA, 2025).

Map 2 highlights projected farmland conversion patterns through 2040, showing that areas along Utah's primary growth corridors are at the highest risk of agricultural land loss (Map 2.5 zooms into the growth corridor). These regions are expected to experience continued population expansion, leading to increased demand for housing and commercial development.

The data suggest that without intervention, a significant share of productive agricultural land—particularly near urban centers—may be converted to non-agricultural uses. This trend poses risks to long-term food production capacity and reinforces the importance of land-use planning and farmland preservation policies.



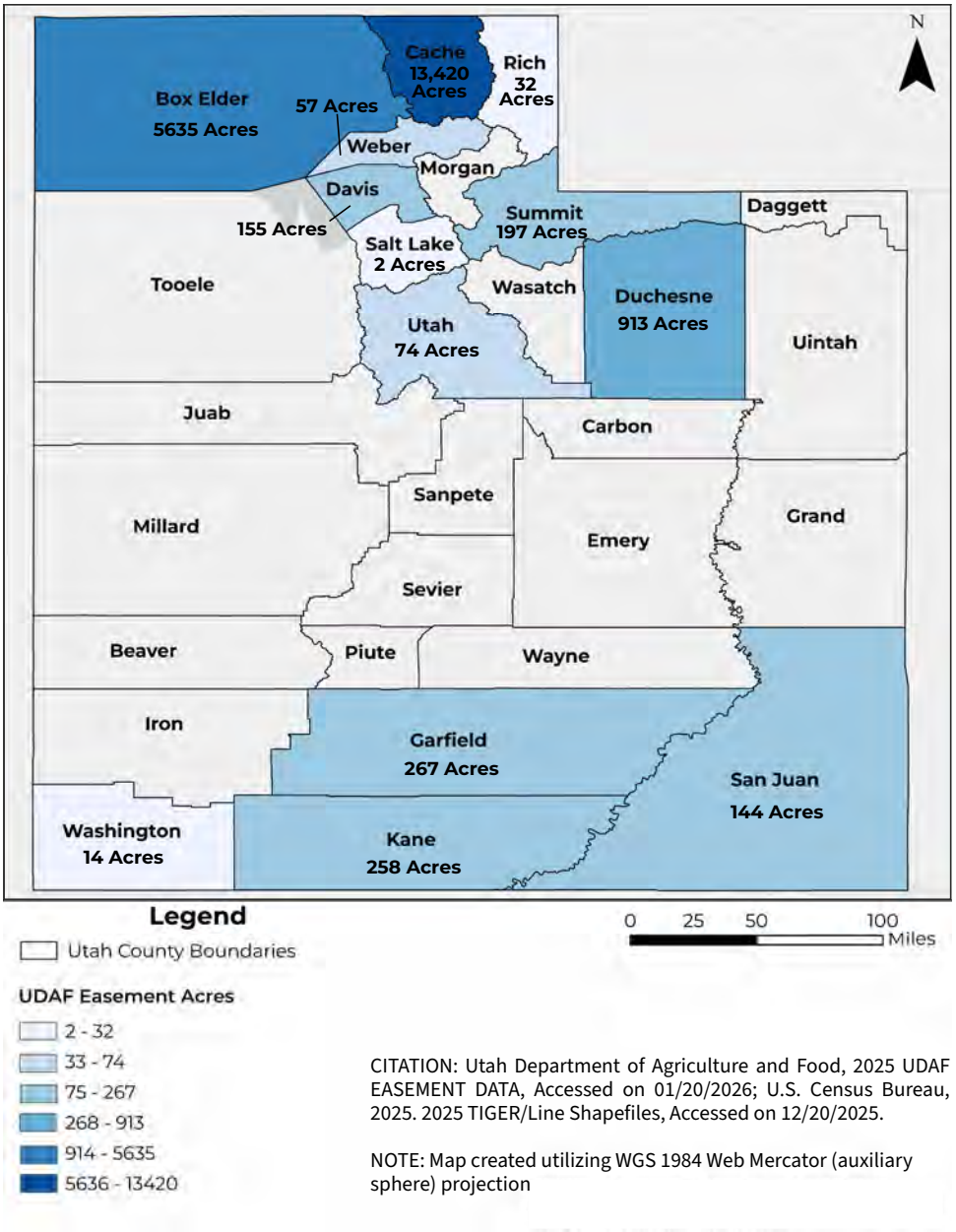
Definition of Business as Usual: Development follows recent patterns. Poorly planned development and low-density residential sprawl continue to rapidly convert farmland and ranchland (American Farmland Trust, Farms Under Threat 2040).

CITATION: AMERICAN FARMLAND TRUST. 2025. 2040 FARMS UNDER THREAT, ACCESSED ON 12/20/2025; U.S. Census Bureau, 2025. 2025 TIGER/Line Shapefiles, Accessed on 12/20/2025.

NOTE: Map created utilizing WGS 1984 Web Mercator (auxiliary sphere) projection

MAP 2: Loss of Farmland by 2040 Under Business as Usual Scenario

MAP 3: Total Acreage of Utah Department of Agriculture and Food Easements by County



CITATION: Utah Department of Agriculture and Food, 2025 UDAF EASEMENT DATA, Accessed on 01/20/2026; U.S. Census Bureau, 2025. 2025 TIGER/Line Shapefiles, Accessed on 12/20/2025.

NOTE: Map created utilizing WGS 1984 Web Mercator (auxiliary sphere) projection

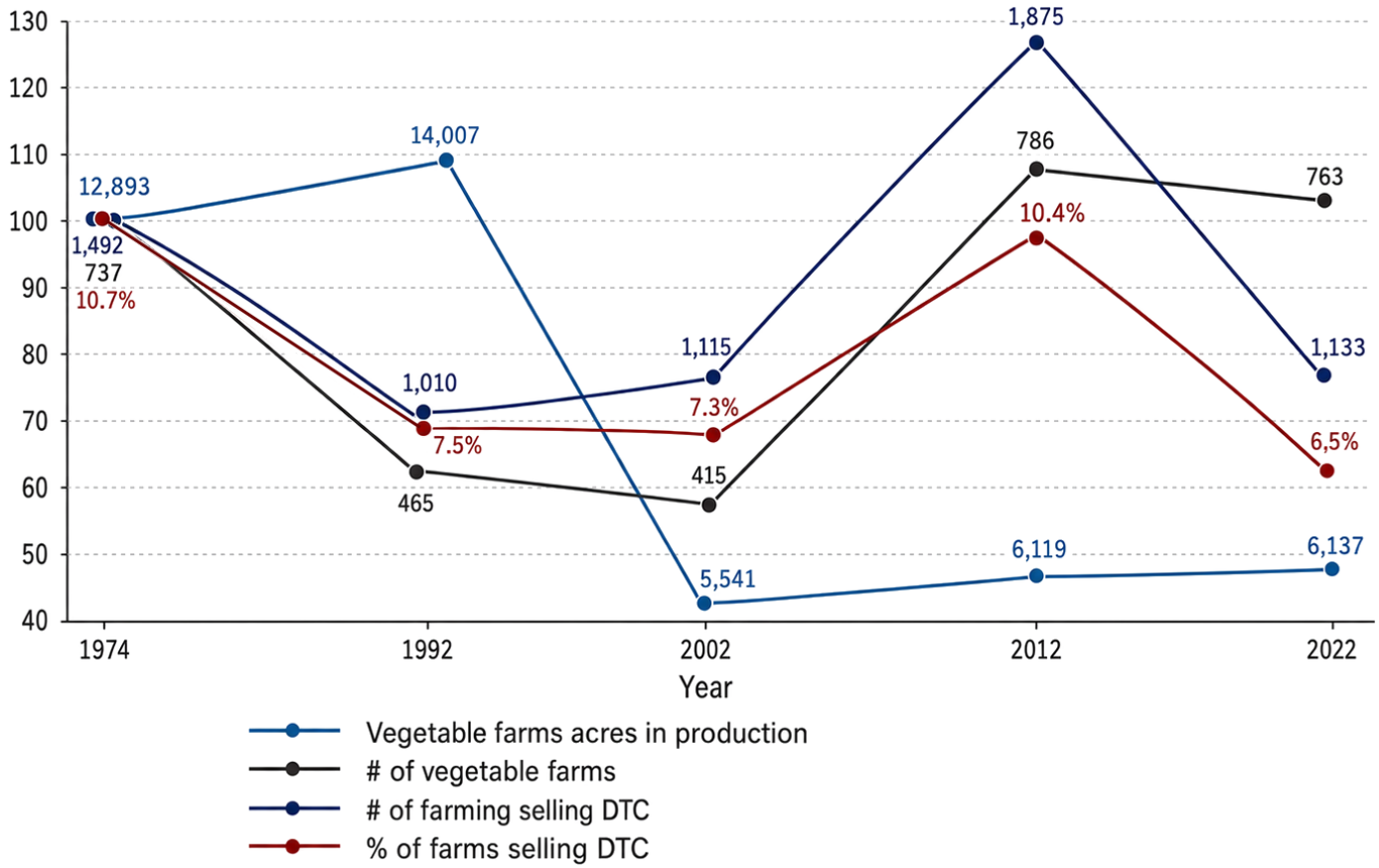
Map 3 provides a spatial comparison between areas under conservation easements and changes in cropland acreage over time. Counties with established agricultural protection programs show stronger retention of agricultural land relative to areas without such programs.

Despite these protections, some regions continue to experience declines in cropland acreage, indicating that conservation efforts may not be keeping pace with development pressures. The data highlight both the effectiveness of existing programs and the need to expand preservation strategies to additional high-risk areas. Map 3 highlights regions where farmland has been successfully preserved, as well as areas experiencing declines in agricultural land. While land remains a foundational issue, market conditions also play a major role in shaping the future of Utah agriculture and the opportunities available to producers.

LOCAL FOOD MARKET ACTIVITY AND DEMAND

Market participation trends point to a more varied local market landscape in Utah. Direct-to-consumer (DTC) sales accounted for 6.5 percent of farms in 2022, down from 10.4 percent in 2012, while direct-to-wholesale sales increased between 2017 and 2022. Together, these trends suggest that producers are using a mix of market channels and that some are expanding beyond DTC sales into wholesale and other outlets.

Chart 2 (USDA NASS, 2025) shows how vegetable production and DTC sales have changed over time in Utah. Together, these indicators help illustrate shifts in smaller-scale production and local market activity across the state. The table shows that while the number of vegetable farms has remained relatively stable in recent years, the share of farms selling directly to consumers has fluctuated over time. The higher share in 2012 likely reflects a broader national rise in direct marketing during that period, including growth in community supported agriculture (CSA) and other local food sales channels.

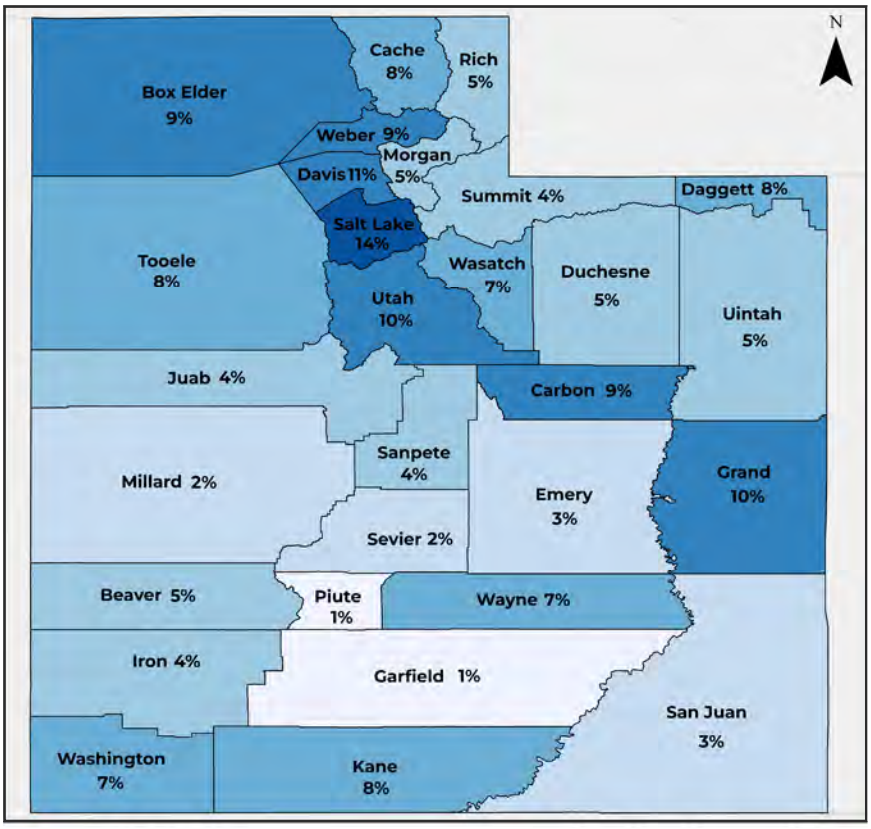


NOTE: Lines are indexed to 1974 = 100 to allow comparison across measures with different scales. Point labels show actual reported values

Chart 2: Utah Vegetable Production and Number of Farms selling Direct-to-Consumer

Despite these changes, agriculture remains economically significant. In 2022, the market value of agricultural products sold totaled $2.34 billion. However, the average net cash farm income of $30,809 per farm is well below the national average of $79,790 per farm (USDA NASS, 2022b).

MAP 4: Percentage of Farms Selling Direct-to-Consumer (DTC)



CITATION: U.S. Department of Agriculture, National Agricultural Statistics Service. 2022 Census of Agriculture Accessed on 12/20/2025;

U.S. Census Bureau, 2025. 2025 TIGER/Line Shapefiles, Accessed on 12/20/2025.

NOTE: Map created utilizing WGS 1984 Web Mercator (auxiliary sphere) projection

County-level trends indicate that larger operations are becoming more concentrated in rural areas, while smaller farms are emerging closer to urban corridors. This pattern reflects both land cost pressures and stronger demand for local food near population centers. Map 4 (USDA NASS, 2022b) shows that DTC production remains concentrated in many of these urban-adjacent and tourism-oriented counties, where access to nearby consumers is strongest. Higher concentrations of DTC producers are observed in counties with greater population density and tourism activity, where demand for locally sourced food is strongest.

Utah also saw notable growth in farms selling directly to wholesale markets between 2017 and 2022, with the number increasing from 192 to 486 farms and the share rising from 1.3 percent to 2.8 percent. This suggests growing interest in market channels beyond DTC sales and points to expanding opportunities in wholesale and other intermediate markets.

Taken together, these findings suggest that DTC remains an important market channel in parts of Utah, especially near population centers, but it is not the only pathway for growth. The recent increase in direct-to-wholesale sales points to expanding interest in other local and regional market channels. At the same time, stronger aggregation, processing, and distribution infrastructure will be important to help producers serve these markets more consistently and at greater scale. In addition to changes in how producers sell, household spending patterns help show the scale of food demand that exists within Utah.

Consumer spending patterns in Utah indicate strong demand for food relative to household income. With a median household income of approximately $91,750, Utah households spend an average of $12,3697 annually on food, representing 13.4 percent of total expenditures. Of this total, 4.8 percent is spent on food away from home, while 8.6 percent is spent on food consumed at home (see table 1). Within at-home spending, the largest category is snack and other food products (USDA ERS, 2026).

TABLE 1: UTAH HOUSEHOLD CONSUMER FOOD EXPENDITURES

	AVG ANNUAL SPEND	% OF MEDIAN INCOME
Consumer expenditures per household on dining out (food away from home)	$4,407.06	4.8%
Total consumer expenditures per household on food consumed at home	$7,861.91	8.6%
Bakery products	$1,004.41	1.1%
Dairy products	$743.97	0.8%
Fruits and vegetables	$1,547.38	1.7%
Meat, poultry, fish and eggs	$1,691.81	1.8%
Nonalcoholic beverages	$798.05	0.9%
Snacks and other food products	$2,874.34	3.1%

Utah households allocate a larger share of their budgets to food than the national average of 10.6 percent, aligning most closely with middle income households nationally, which spend about 13.5 percent of after tax income on food, while higher income households spend 8.1 percent and lower income households spend 32.6 percent. This suggests that food expenditures represent a meaningful portion of household budgets in Utah, reinforcing the scale of consumer demand and the opportunity to expand in state production and supply chain capacity to capture a greater share of that spending locally. This consumer demand, along with growing institutional interest, has helped support a range of local food initiatives that connect Utah producers to buyers and communities.

Local food systems represent a growing segment of Utah's agricultural economy, driven by increased consumer demand and expanding institutional participation. Programs such as Utah's Own, Utah Farm to Fork, Double Up Food Bucks, the Senior Farmers Market Nutrition Program, and Produce Rx strengthen connections between producers and consumers while improving access to locally grown food.

While the USDA's Farm to School Census reports that 82 percent of School Food Authorities (729 schools) participate at some level of farm to school participation, many purchases remain limited in volume or frequency (USDA, FTS). This includes schools that may purchase at low levels, such as one-time purchases during the school year, or primarily purchase only milk. Stakeholders identified significant opportunities to strengthen producer-to-school connections and expand institutional purchasing of Utah-grown products through improved coordination, infrastructure, and supply chain support.

These initiatives help strengthen local markets by increasing purchasing power, directing more food dollars into Utah's agricultural economy, and expanding access to fresh food, especially for lower-income communities. Their reach and impact, however, vary across the state depending on the availability of local producers and the supply chain infrastructure needed to process, store, and distribute food. Utah's broader farm-to-fork effort, led through a partnership between the Utah State Board of Education and the UDAF, builds on this work by supporting local procurement, food education, and stronger connections between schools, communities, and Utah producers.

Other initiatives have also helped producers and food businesses improve infrastructure, expand operations, and reach new local markets. These include UDAF's Food Security Grant Program (UFSG) and the USDA Regional Food System Infrastructure (RFSI) program. Together, these programs have provided important funding support for equipment, facilities, and other infrastructure needed to strengthen Utah's local food system.

From 2022 to 2025, the UFSG program invested $4,082,720 through eighty-eight awards to Utah recipients, with $1 million appropriated in each year's state budget. As of December 2025, the RFSI program had invested $2,564,521 in twenty-four Utah recipients. Combined, these programs represent over $6.6 million in documented food system infrastructure investment statewide.[1] Among the fifty-two UFSG recipients with documented pre- and post-grant capacity data, median processing or handling capacity increased by 63 percent for meat processing, 95 percent for fruit and vegetable operations, and 300 percent for dairy operations. Although these results reflect only the recipients that reported capacity data and are not representative of all awards, they suggest that targeted infrastructure investments can meaningfully expand capacity in key parts of Utah's food system.

1 While outside the scope of this study and not specifically related to infrastructure, improvements to food business operations have also been made through the Specialty Crop Block Grant and the Business Builder grant awards from Southwest Regional Food Business Center funding. There is a future opportunity to explore the impact of these programs.

FOOD INFRASTRUCTURE AND BUSINESS LANDSCAPE

Utah's food business landscape reflects a fragmented and unevenly distributed system of processing, manufacturing, and distribution infrastructure. While the state supports a range of food-related businesses, including meat and dairy processing facilities, food manufacturers, shared use kitchens, and co-packers, the availability and geographic distribution of these facilities vary significantly across regions.

Utah's agricultural processing and handling infrastructure shows significant capacity gaps relative to the state's production base:

- Of 369 food manufacturers operating in Utah, 32 (8.7 percent) offer co-packing services.
- Cold storage facilities are concentrated in urban areas, with rural cold chain capacity absent in production-concentrated counties.
- Organic grain cleaning capacity is minimal statewide (2021 Utah Co-Packer Study). The first documented recent Utah investment in grain cleaning infrastructure — a conventional wheat cleaning and bagging operation — was installed in 2025 through the UFSG program; dedicated organic-certified grain handling capacity remains unavailable at scale.
- Equipment cooperatives that support small- and mid-sized farms are very limited.
- Fresh produce processing capacity is limited and geographically concentrated, leaving the majority of Utah's producing counties without accessible processing options.
- There are approximately ten food incubators or shared-use kitchens that support small-scale food production, food service, or ready to eat foods.
- There are currently no established food hubs in Utah that aggregate and distribute food at scale, although planning and development efforts are underway, including the Central Utah Agri-Park (Utah Inland Port Authority).

Table 2 highlights the structure of this system, showing a large number of both non-employer establishments, such as cottage food producers, owner-operated small farms, and other self-employed food business owners across food manufacturing and related industries. Utah has 430 employer food manufacturing establishments, alongside 612 non-employer operations, indicating that a substantial share of the sector consists of very small or owner operated businesses. This pattern is particularly evident in subsectors such as bakeries and specialty food production, where non-employer establishments outnumber traditional firms (US Census Bureau, a).

The data also show limited infrastructure in key areas of the supply chain. For example, Utah has only forty-one employer establishments in animal slaughtering and processing and relatively few facilities in grain milling, dairy processing, and warehousing.

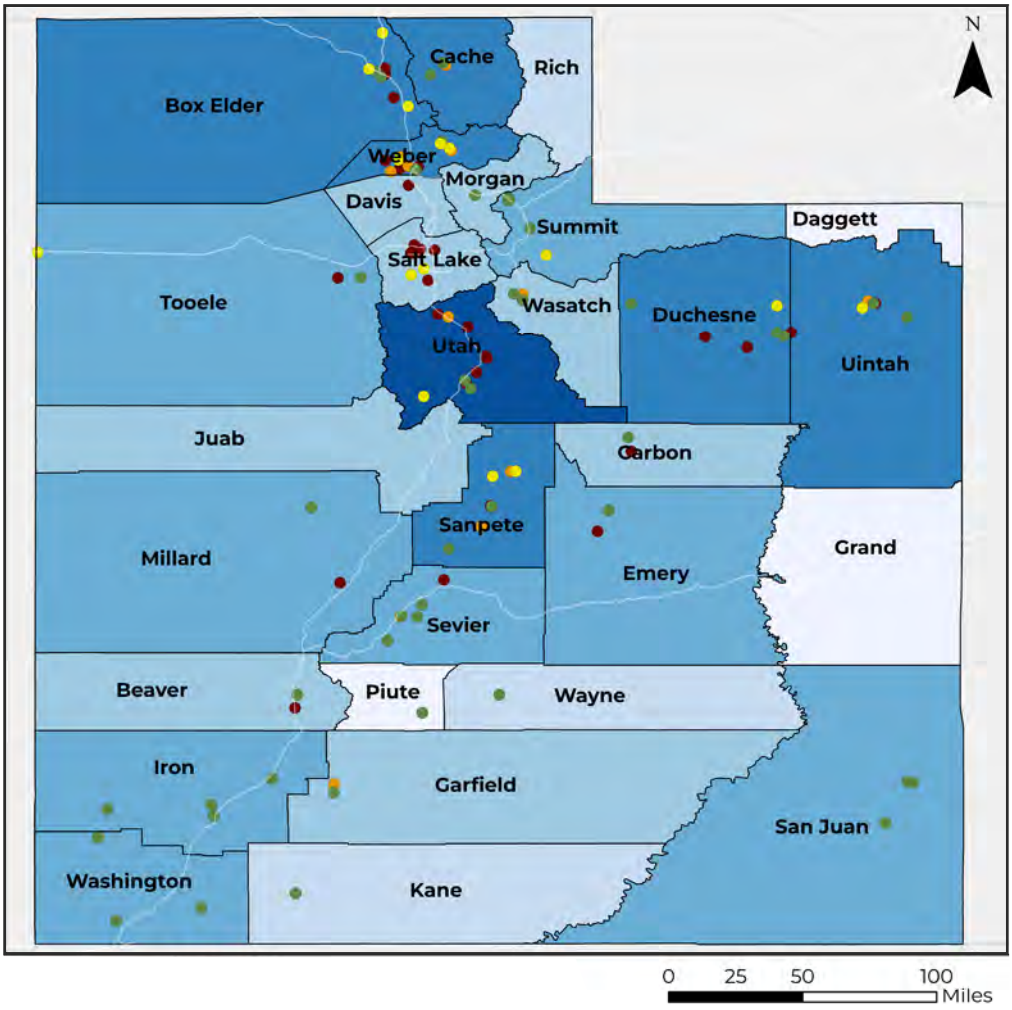
TABLE 2: UTAH FOOD SECTOR ESTABLISHMENTS

FOOD ESTABLISHMENTS IN UTAH[2]	# OF EMPLOYER ESTABLISHMENTS	# OF NON-EMPLOYER ESTABLISHMENTS[3]
Food manufacturing	430	612
Bakeries and tortilla manufacturing	177	259
Grain and oilseed milling	10	3
Fruit and vegetable preserving and specialty food	25	48
Dairy product manufacturing	28	24
Animal Slaughtering and processing	41	30
Warehousing and storage	NA	323
Refrigerated warehousing and storage	12	NA
Farm Product warehousing and storage	4	NA
Other food manufacturing	NA	180

2 County Business Patterns data are subject to U.S. Census Bureau disclosure avoidance procedures, including suppression, noise infusion/perturbation, and publication thresholds.The food manufacturing subcategories shown are a selected subset of industries relevant to this analysis and do not represent all food manufacturing establishments included in the total food manufacturing figures. Therefore, the listed subcategories will not sum to the overall food manufacturing total

3 Non-employer establishments are businesses with no paid employees that are subject to federal income tax and have annual receipts of at least $1,000. listed subcategories will not sum to the overall food manufacturing total.

MAP 5: Number of Livestock and Poultry Producers (2022) and Meat Processing Facilities



LEGEND

Meat Processing Facilities

- Mobile Harvest (not for sale)
- Custom Exempt (not for sale)
- Small Poultry Processors (for direct-to-consumer)
- Talmadge Aiken Facilities (wholesale across state lines)

Number of Livestock and Poultry Producers 2022

- 18 - 63
- 64 - 112
- 113 - 200
- 200 - 389
- 390 - 635
- 636 - 1092
- Utah County Boundaries

CITATION: Utah Department of Agriculture and Food, 2025 Meat Processing Facilities, Accessed on 01/12/2026; U.S. Census Bureau, 2025. 2025 TIGER/Line Shapefiles, Accessed on 12/20/2025; U.S. Department of Agriculture, National Agricultural Statistics Service. 2022 Census of Agriculture Accessed on 1/9/2026

NOTE: Map created utilizing WGS 1984 Web Mercator (auxiliary sphere) projection

Map 5 further illustrates the spatial relationship between livestock production and processing infrastructure, highlighting a key structural challenge within Utah's food system. While livestock operations are widely distributed across rural counties, meat processing and dairy facilities are comparatively limited and often concentrated in specific areas. The limited availability of feedlots and livestock finishing capacity in Utah further creates a bottleneck by reducing opportunities for animals to be finished, processed, and marketed within the state.

Statewide, Utah has approximately ten food incubators or shared-use kitchens, which provide important entry points for small-scale food entrepreneurs and value-added producers. However, the state currently has no operating food hubs, representing a significant gap in aggregation, storage, and distribution infrastructure. Without food hubs, producers face challenges in scaling beyond direct-to-consumer markets and accessing institutional or wholesale buyers.

Additionally, approximately thirty co-packers operate in Utah, offering contract manufacturing services that allow producers to scale production without investing in their own facilities. While this infrastructure supports growth for some businesses, the relatively small number of co-packers limits access and capacity across the state.

Overall, the food business landscape is characterized by a strong base of small-scale and entrepreneurial activity, but constrained by gaps in mid-scale infrastructure. These limitations restrict the ability of producers to move efficiently through the supply chain and access larger markets. The capacity of this infrastructure also depends on the workforce needed to operate facilities, support food businesses, and sustain growth across the supply chain.

FOOD SECTOR EMPLOYMENT AND WORKFORCE

Utah's food sector is a significant source of employment and economic activity. The state has approximately 1,042 food manufacturers, nearly 60 percent of which are non-employer businesses. Together, these businesses support nearly 21,000 jobs (US Census Bureau, b). In addition, there are 559 active cottage food permits, reflecting strong participation in small-scale and home-based food production (UDAF, 2026).

Workforce development is supported by at least nine agriculture and food-related training programs across the state, including university programs, extension services, nonprofits, and technical education initiatives. Taken together, these findings point to both the opportunities and the constraints within Utah's food system and set the stage for the following economic analysis of supply chain gaps and investment needs.

ECONOMIC ANALYSIS OF SUPPLY CHAIN GAPS AND INVESTMENT NEEDS

An economic analysis was conducted to assess mid-supply-chain infrastructure gaps, regional investment needs, and the potential economic impacts of processing facility development.

By examining current infrastructure for aggregation, distribution, storage, and processing and modeling phased investment priorities needed to address these gaps, the analysis identifies where future infrastructure investments could have the greatest impact. The analysis drew on publicly available agricultural, employment, and economic data, including crop production and livestock statistics, county-level labor force and industry data, program expenditure records, and broader economic activity across Utah's twenty-nine counties.

The economic analysis identified an estimated $80–95 million in targeted agricultural infrastructure investment for Utah. This investment would help address infrastructure gaps that currently limit Utah producers' ability to access value-added markets, organic premiums, and institutional buyers. This total reflects two tiers of investment. Tier 1 focuses on infrastructure that helps make specialty crop production and value-added processing more financially viable at the farm level. Tier 2 focuses on larger processing facilities that would provide the capacity producers need to scale and access new markets. These two tiers complement each other: Tier 1 investments help build the producer base and product volume needed to support larger Tier 2 facilities over time. At full build-out, this combined investment framework would support an estimated 783 construction-phase jobs and 383 permanent annual jobs and generate more than $107 million in annual economic activity from the processing facilities alone. Table 3 outlines the infrastructure types evaluated in this analysis, along with the estimated investment costs and the identified need for each.

TABLE 3: INFRASTRUCTURE INVESTMENT

INVESTMENT TIER	INFRASTRUCTURE TYPE	IDENTIFIED NEED	ESTIMATED NEED
Tier 1	Co-packing facilities	25–50 additional general co-packing facilities; dedicated small-producer co-packing capacity in at least 3–5 regions	$2–10 million (total for 25–50 facilities); $200,000–400,000 per facility
Tier 1	Fresh produce processing	3–5 additional facilities, at least 1 in a production-concentrated rural county	$1–3.75 million (total for 3–5 facilities); $300,000–750,000 per facility
Tier 1	Low-acid food processing	1 dedicated low-acid processing facility (vegetables, sauces, canned goods) with FDA Low-Acid Canned Food (LACF) certification	$500,000–1 million (single facility build-out, including retort equipment and FDA certification fit-up)
Tier 1	Small-batch processing	3–5 existing co-packing facilities upgraded or configured to accept 1,000–5,000 unit minimum runs for small-producer use	$450,000–1.5 million (total for 3–5 facility upgrades); $150,000–300,000 per facility upgrade; if new build cost would be higher.
Tier 1	Cold storage (regional)	2–3 regional cold storage hubs in production-concentrated rural counties; estimated 35,000–50,000 cu ft per hub.	$1–3 million (total for 2–3 hubs); $500,000–1 million per regional hub
Tier 1	Organic grain cleaning	2–3 certified organic grain cleaning and segregated storage facilities.	$500,000–1.2 million (total for 2–3 facilities); $250,000–400,000 per facility
Tier 1	Equipment cooperatives	4 regional equipment cooperatives providing shared access to specialty planting and harvest equipment.	$400,000–800,000 (total for 4 regional cooperatives); $100,000–200,000 per cooperative (8–20 member farms)
Tier 2	Meat and cattle processing	A mid-sized Utah meat processing plant (12,000–40,000 sq ft; 20–100 head/day capacity; 55–85 workers). Utah has 39 USDA-inspected meat plants, most of which are classified as “very small” (under 12,000 sq ft). Slaughter and fabrication capacity are the primary supply chain constraints identified by regional distributors, institutional buyers, and direct-market producers.	$17.5 million for a new facility
Tier 2	Dairy processing plant	A mid-sized Utah dairy processing plant (40,000–90,000 sq ft), processing 250,000–750,000 pounds of milk daily, employing 70–135 workers. Utah’s annual milk supply is approximately 2.3 billion pounds.	$14 million for a new facility
Tier 2	Grain processing plant	A mid-sized grain processing plant (25,000–60,000 sq ft; 5–25 tons per hour throughput; 18–45 workers).	$19.75 million for a new facility
Tier 2	Fruit processing plant	A mid-sized fruit processing plant (15,000–40,000 sq ft; 5–40 tons/day; 25–70 employees). Fruit production is concentrated in Utah County (peaches, cherries, apples), Box Elder County (tree fruit), and Washington County (grapes, peaches, niche crops).	$13.6 million for a new facility

TABLE 4: SITE SELECTION MATRIX FOR TIER 2 PROCESSING INVESTMENTS

COUNTY	DAIRY	GRAIN + FRUIT	MEAT	OVERALL PRIORITY
Cache	**Excellent**	**Excellent**	**Excellent**	**Hub county — top priority, multi-sector**
Box Elder	**Excellent**	**Excellent**	**Excellent**	**Hub county — top priority, multi-sector**
Utah County	Strong	**Excellent**	Strong	**Urban-adjacent — high priority**
Weber	Strong	Strong	Strong	Hub county — strong candidate
Millard	Strong	Moderate	Strong	Production-rich, infrastructure-limited — strong candidate
Beaver	Strong	Mod-low	Strong	Production-rich, infrastructure-limited — selective opportunity
Salt Lake*	Strong*	Strong*	Strong*	Urban-adjacent — strong candidate, cost constrained (land cost and availability)
Tooele	Strong	Strong	Strong	Urban-adjacent — strong candidate
Iron	Moderate	Strong	Strong	Urban-adjacent — strong candidate
Sanpete	Moderate	Moderate	Strong	Production-rich, infrastructure-limited — strong candidate
Washington	Moderate	Strong	Moderate	Production-rich, infrastructure-limited — selective opportunity
Sevier	Moderate	Moderate	Moderate	Production-rich, infrastructure-limited — selective opportunity
Juab	Moderate	Moderate	Moderate	Production-rich, infrastructure-limited
Davis	Moderate	Moderate	Moderate	Production-rich, infrastructure-limited
Morgan	Moderate	Moderate	Moderate	Urban-adjacent
Wasatch	Moderate	Moderate	Moderate	Urban-adjacent
Rich	Mod-low	Low	Mod-low	Urban-adjacent
Carbon	Mod-low	Mod-low	Mod-low	Rural supply chain support
Emery	Mod-low	Mod-low	Mod-low	Rural supply chain support
Uintah	Mod-low	Mod-low	Mod-low	Rural supply chain support
Summit	Mod-low	Mod-low	Mod-low	Rural supply chain support
Duchesne	N/A **	N/A**	Mod-low	Urban-adjacent
San Juan	Low	Low	Low	Rural supply chain support
Grand	Low	Low	Low	Rural supply chain support
Garfield	Low	Low	Low	Rural supply chain support
Kane	Low	Low	Low	Rural supply chain support
Piute	Low	Low	Low	Rural supply chain support
Wayne	Low	Low	Low	Rural supply chain support
Daggett	Very low	Very low	Very low	Rural supply chain support

NOTES: Ratings based on sector-specific site criteria, including milk supply/livestock density, grain/fruit production, workforce, infrastructure, land availability, and proximity to markets.

* Salt Lake ratings reflect strong fundamentals constrained by land cost and availability.

Additional analysis was conducted to help guide where different investments may be most feasible and impactful. This included a county-level site selection matrix for larger Tier 2 processing facilities and a set of regional infrastructure profiles to support broader investment planning across the state.

The county-level site selection matrix is most applicable to the larger Tier 2 processing investments, where factors such as labor availability, agricultural supply, utilities, logistics, land and permitting conditions, cold storage, and workforce training are especially important. The matrix evaluates all twenty-nine Utah counties across these seven criteria and helps identify which counties are best positioned for larger dairy, grain, fruit, and meat processing facilities (see table 4).

The results show that some counties stand out as strong candidates across multiple sectors, while others may be better suited to more targeted opportunities. Cache and Box Elder emerged as top priorities for dairy, grain and fruit, and meat processing, while Utah, Weber, Tooele, Iron, Millard, Beaver, and Sanpete also showed varying levels of potential depending on the sector. Salt Lake County scored well on many infrastructure factors but is more constrained by land cost and availability.

Many infrastructure needs extend beyond any single county. They depend on how production areas, processing capacity, and market networks function together across a region. To complement the county matrix, regional infrastructure profiles were developed. These profiles provide a broader framework for prioritizing both Tier 1 and Tier 2 investments based on regional production strengths, infrastructure gaps, and supply chain connections.

The profiles provide a framework for identifying where different types of infrastructure investment may be most needed and where resources could be prioritized for the greatest impact. They consider where producers and existing infrastructure are located, how rural and urban areas are connected, and the indirect and induced economic impacts that would extend across a region's supply chain. Table 5 provides an overview of each profile and the counties included in it.

Together, the county site selection matrix and the regional infrastructure profiles provide a practical framework for directing investments to the places where they are most likely to strengthen Utah's food supply chain, support producers, and improve market access.

TABLE 5: Regional Infrastructure Profiles

PROFILE	DESCRIPTION	COUNTIES
Production-rich, infrastructure-limited counties	These counties have substantial livestock and grain production, available land, and producer interest in expanding production capacity but lack the processing, cold storage, and logistics infrastructure needed to connect that production to markets requiring value-added handling. The economic opportunity in these counties focuses on increasing meat and grain processing capacity, which would support existing livestock and grain operations that currently must transport products to hub counties for processing. Producers looking to diversify or add specialty crop production would need cold storage, co-packing, and equipment access that make specialty crops economically viable for dispersed rural producers. Investment priorities include mobile processing units, shared cold storage, and equipment cooperatives structured to serve a dispersed producer network across large county areas.	Beaver Iron Juab Millard Sanpete Sevier Washington[4]
Hub counties with processing infrastructure	These counties have strong dairy and livestock infrastructure, access to the I-15 and I-84 freight corridors, a deep agricultural workforce, and established food manufacturing clusters. They are the highest-scored locations for mid-sized processing facility investments in the site selection analysis. Processing infrastructure in these counties supports supply chain connections to surrounding rural counties through aggregation and co-packing relationships.	Box Elder Cache Weber
Urban-adjacent counties	These counties offer access to urban consumer markets, university-linked R&D and technical support, and strong logistics infrastructure. Land costs are higher than in rural counties and can constrain facility footprint and site selection, particularly in Salt Lake County. Labor costs are also higher, but these counties have greater labor availability than rural areas: the Wasatch Front labor pool is deeper, food manufacturing workforce experience is more concentrated, and university and community college training infrastructure supports specialized processing skills. These characteristics make urban-adjacent counties well suited for value-added specialty product development, pilot-scale processing, and institutional market channels where labor availability and market proximity matter more than land cost. Salt Lake County scores well on infrastructure criteria but is constrained by land cost and availability.	Davis Morgan Salt Lake Summit Tooele Utah Wasatch
Rural supply chain support counties	For these counties, investment should focus less on large-scale processing facilities and more on targeted, appropriately scaled infrastructure that fits smaller production volumes and remote geography. Priorities may include shared cold storage, aggregation development/coordination, refrigerated transport, mobile processing or slaughter access, and partnerships with nearby counties that have existing processing capacity. Opportunities may center on niche and place-based market development, including specialty products, direct-to-consumer sales, agritourism, and coordinated transportation to regional processing facilities rather than building new stand-alone facilities.	Carbon Duchesne Emery Garfield Grand Kane Piute Rich San Juan Uintah Wayne Daggett

4 Several of these counties will be supported by the Central Utah Agri-Park, an agricultural processing center currently in the planning phase. Led by the R6 Regional Council, the agri-park is intended to support family farms, agricultural producers, and rural economic growth across Juab, Millard, Piute, Sanpete, Sevier, and Wayne Counties. The project has received $9 million from the two appropriations from the Utah legislature and $1 million from the combined six counties in our region. A $100,000 grant from the U.S. Economic Development Administration is currently supporting an agronomic study of the region.

CROP DIVERSIFICATION ANALYSIS

The crop diversification analysis was developed to provide a quantitative foundation for producers, planners, and policymakers evaluating the economic parameters of crop diversification opportunities alongside or in rotation with existing crops. After examining the full range of Utah's major crops, alfalfa was selected as the baseline for comparison because it is the most widely grown crop in the state and plays a central role in Utah's agricultural economy. **This analysis is not intended to suggest replacing alfalfa production but rather to explore where diversification may make sense for some producers under certain conditions.**

The model examined six other crops: onions, potatoes, dry beans, corn grain, spring wheat, and organic grain. Each crop was modeled under three scenarios: low (poor-year yield and price), median (four-year observed midpoint, 2021–24), and high (strong-year), using USDA NASS–observed state-level price and yield ranges from the 2021–24 marketing-year window. Alfalfa is modeled under the same three scenarios, ensuring consistent comparisons across all crops. The model also evaluates and distinguishes between two alfalfa production types that reflect the real range of Utah operations: standard established stands (commodity-grade hay at $130–$280/ton, 3. 3.2–4. 4.5 tons/acre) and premium/Supreme- grade alfalfa (dairy-quality hay at $240–$355/ton, 2. 2.8–4. 4.0 tons/acre). These two types produce meaningfully different return profiles, and a producer evaluating diversification scenarios should have the data to compare against whichever alfalfa type reflects their actual operation. A producer currently selling dairy-quality hay faces a higher bar for any other crop to match alfalfa returns; one selling commodity- grade hay faces a lower one. The same scenarios that govern alfalfa returns also govern the returns for every other crop; no crop is held to a different standard. The low scenario serves as the base analytical framework for assessing diversification potential because it sets the highest possible bar for the case: if another crop shows a positive net return under the same poor-year conditions applied to alfalfa, that finding provides a more evidence-based case the most defensible basis for considering diversification. The median scenario represents the statistical midpoint of the 2021–24 USDA NASS observed range; a period that included both elevated and moderating market conditions and should not be read as a forecast of any single future year. The high scenario reflects the upper bound observed in that same window. Together, the three scenarios give a fuller picture of where crops stand across the range of conditions Utah producers actually experience.

Cost input figures are based on USU Extension county production budgets (2006 base year) and are adjusted for inflation using the USDA ERS Index of Prices Paid by Farmers (a composite factor of 1.45×, reflecting 2006–24 input cost increases across seed, fertilizer, fuel, labor, and chemicals). Revenue figures use USDA NASS state-level crop production and price data (2021–24 marketing years) where Utah-specific data are available; nearest western-region proxy data are used where Utah is not a NASS-program state. All modeled scenarios reflect partial-acreage crop inclusions (15 to 50% of a representative farm), not full operational changes. Producers should verify current prices and yields before applying these figures to farm-level planning.

The analysis found that three modeled crops (onions, potatoes, and dry beans) showed positive net returns across low, median, and high scenarios, indicating potential economic opportunities for diversification under the right conditions (see table 6). Table 6 also reports net gain relative to alfalfa at median prices and yields and an expected return that weights the median scenario most heavily as a multi-year planning approximation; these two columns are the most useful for producers evaluating diversification decisions over time. Dry beans represent the lowest-risk diversification opportunity among the crops modeled: positive returns in all three scenarios, a median-year net gain of +$430/acre, an expected return of +$867/acre, the lowest capital requirement of the three other crops, and compatibility with existing grain-equipment infrastructure, though buyer-identification risks remain. Onions and potatoes, although showing net returns or gains, would require higher upfront capital and access to infrastructure, making them higher-risk options. Corn grain and spring wheat were negative or near breakeven in most scenarios and are not recommended as primary diversification crops, though corn may serve as a rotation candidate in favorable years.

Realizing opportunities across the three positive-scenario crops depends on access to buyers, processing, storage, equipment, and working capital, which are not sufficiently available throughout Utah. Current mid-supply-chain infrastructure—including cold storage, fresh produce processing, co-packing, and organic grain handling—is not sufficient in many parts of the state to support either growth among existing operators or commercial-scale crop diversification. **In short, the economic case for the opportunities diversification offers is evident across multiple scenarios, but the infrastructure needed to act on those opportunities reliably is not yet in place statewide.** The investment required to close that gap is the subject of the previously discussed economic impact analysis.

TABLE 6: Crop economics by scenario (low, median, and high scenarios; USDA NASS–observed Utah price and yield ranges, 2021–24)

CROP	TOTAL COST PER ACRE	REVENUE $/ACRE (LOW / MED / HIGH)	NET RETURN $/ACRE (LOW / MED / HIGH)	AVG ANNUAL RETURN $/ACRE (MODELED)	NOTES
Alfalfa (standard/ commodity grade)	$473	$416 / $800 / $1,260	$57 / $327 / $787	$346	Baseline crop data used for comparison analysis
Alfalfa (premium grade)	$473	$672/ $644 / $947	$199 / $644 / $947	$608	Positive in all scenarios; dairy/feed-lot quality market required
Onions	$3,924	$4,495 / $8,800 / $16,640	$571 / $4,876 / $12,716	$5,760	Positive in all three scenarios; capital-intensive and high price volatility
Potatoes	$3,755	$4,025 / $6,450 / $10,000	$270 / $2,695 / $6,245	$2,976	Positive in all three scenarios; high capital barrier (cold storage/infrastructure need)
Dry beans	$827	$1,044 / $1,584 / $2,565	$217 / $757 / $1,738	$867	Positive in all three scenarios; lowest capital barrier, equipment-compatible but buyer risks
Corn – grain	$1,145	$870 / $1,138 / $1,575	−$275 / −$8 / $430	$35	Negative in low/median scenarios; positive only in high scenarios; potential rotation candidate
Spring wheat	$812	$292 / $518 / $810	−$521 / −$294 / −$2	−$277	Negative in all three scenarios; not viable as a stand-alone transition crop

MODEL NOTES:

- Scenario definitions: Low = observed minimum (or 5th-percentile trough) in 2021–24 USDA NASS marketing-year data; Median = 4-year statistical midpoint of USDA NASS Utah–observed price and yield data (2021–24 marketing years), reflecting the central tendency of a period that included both elevated and moderating market conditions; not a forecast of any single future year; High = observed maximum (or 95th-percentile peak) in same window.
- Alfalfa appears first in all tables because it is the baseline crop for all comparisons. Remaining crops are ordered by capital intensity/revenue tier (high → low): specialty (onions, potatoes) → pulse/field (dry beans) → commodity grains (spring wheat, corn).
- Cost basis: USU Extension County production is budgets (2006 base year) adjusted by a composite 1.45× inflation factor (USDA ERS Index of Prices Paid by Farmers, 2006–24; fertilizer +71%, fuel +62%, labor +38%, chemicals +29%, seed +44%).
- Alfalfa cost rows assume an established stand (years 2–5 of a typical rotation); establishment-year costs ($200–$300/ac seeding and first-year management) are not included—standard practice for annualized comparison against annual crops. A full-rotation analysis that amortizes establishment costs over 4–5 productive years would reduce alfalfa net return by approximately $50–$75/ac/year.
- Revenue sources: USDA NASS Utah Crop Production (January 2025), USDA NASS Utah Agricultural Statistics 2024 Annual Bulletin, USDA NASS Vegetables 2024 Summary (February 2025), and USDA NASS Crop Values 2024 Summary (February 2025); alfalfa premium/dairy-quality prices from USDA AMS Utah Direct Hay Report (weekly weighted averages); premium/supreme price tier supported by Feuz, Wilkins, Larsen & Bosworth (2025), "Analyzing US Alfalfa Hay Market Dynamics: Effects of Quality Grade on Premiums and Discounts," Journal of Agricultural and Applied Economics, 57(2):276, and USU Extension Alfalfa Hay Pricing Tool (7-western-state analysis, extension.usu.edu/apec/research/current-and-future-alfalfa-hay-prices).
- Average annual return (modeled): This column presents a weighted approximation of multi-year performance, reflecting what a producer might expect to average over a run of years that includes low/poor, mid-range, and strong/high seasons. The analysis is weighted 25% low, 50% median, and 25% high, as the median scenario is most representative of diversified annual outcomes within the 2021–24 ranges, since producers make financial decisions across seasons and years. This is a planning approximation used to support this study's desired information outcomes, based on the 2021–24 USDA NASS observed range, not a predictive analysis.
- Geographic scope: Utah-specific data used where available (alfalfa, corn grain, spring wheat); nearest western-region proxy used where Utah is not a NASS-program state. All scenario prices reflect 2021–24 marketing-year data; producers should verify current prices at USDA NASS Agricultural Prices (monthly, nass.usda.gov) before applying these figures to farm-level planning.
- Note: USDA NASS reported a 2024 Utah all-grades hay average of $167/ton (USDA NASS, 2024 State Agriculture Overview for Utah, February 2026). This falls within the $130/ton low and $200/ton median assumptions for the established/commodity alfalfa row and is consistent with that row's price range used to inform data analysis. Premium-grade prices, which are not separately reported in the state overview, are supported by USDA AMS Utah Direct Hay Report weekly data and Feuz et al. (2025).

Table 6 presents net returns across the full low/median/high scenario range, allowing each crop to be evaluated under the conditions most relevant to a producer's planning horizon, not just the worst-case year. Each scenario serves a distinct planning purpose. The low scenario identifies crops that remain economically viable even under simultaneous poor price and yield conditions—the most conservative basis for a diversification recommendation. The median reflects the central tendency of the 2021–24 observed range, and the high reflects the upper bound of that window.

For alfalfa, the table shows two distinct production types. Established standard or commodity-grade stands are near break-even in poor years, generating approximately $327/acre net at the observed median for 2021–24, and $787/acre in a strong year (expected return: +$346/acre). Premium/supreme-grade dairy-quality alfalfa—sold into feedlot and dairy markets at substantially higher prices—returns +$199/acre even in a poor year, +$644/acre at median, and +$947/acre in a strong year (expected return: +$608/acre). Both alfalfa price tiers reflect observed Utah market data—the established/commodity range is consistent with the 2024 USDA NASS Utah all-grades average of $167/ton (USDA NASS, 2025c), and the premium/supreme range is supported by USDA AMS Utah Direct Hay Report weekly data.

These findings should also be understood in light of alfalfa's important role in supporting Utah's livestock and dairy sectors. Alfalfa is used by both producers feeding their own animals and operations supplying broader feed markets. As a result, any transition away from alfalfa at a scale that affects feed availability could have broader effects on livestock-related industries. These supply-chain relationships are structural features of Utah's agricultural economy and help shape the context in which producers consider diversification decisions. These findings reinforce the need for the infrastructure investments outlined in the previous section, which would help address gaps in processing, storage, distribution, and market access that currently determine whether expansion, entry into new markets, value-added production, product development, or crop diversification are practical options for Utah producers.

Furthermore, alfalfa has a unique ability to withstand periods of limited water because established stands can go dormant under drought stress and resume growth when water becomes available. During dormancy, the plant limits above-ground growth while maintaining energy reserves in its root system, which supports recovery without requiring replanting. USU Extension notes that irrigation can stop at almost any point in the season without causing long-term damage, as alfalfa typically rebounds once irrigation resumes. Established alfalfa stands can therefore survive drought periods and resume production without the replanting costs associated with annual crops each season (Yost et al, 2019).

ALFALFA-ANCHORED BLENDED CROP PORTFOLIO SCENARIOS

The individual crop analysis in table 6 shows what each crop can return on its own under different conditions. Table 7 extends that analysis by modeling two potential acreage mix portfolios—illustrative combinations of crops that a producer might operate alongside retained alfalfa. This portfolio view reflects one way diversification might occur in practice: not as a wholesale crop replacement, but as a partial reallocation of acres across crops with different risk profiles, capital requirements, and market access needs or as an incorporation of other crops for cover cropping, rotation, or soil health objectives.

TABLE 7: BLENDED CROP PORTFOLIO SCENARIOS—WEIGHTED NET RETURN PER ACRE (ILLUSTRATIVE ACREAGE ALLOCATIONS; USDA NASS–OBSERVED UTAH PRICE AND YIELD RANGES, 2021–24)

SCENARIO	ACREAGE MIX (ILLUSTRATIVE)	NET RETURN LOW $/AC	NET RETURN MED $/AC	NET RETURN HIGH $/AC	AVERAGE ANNUAL RETURN $/AC (MODELED)
Conservative transition	70% alfalfa 15% dry beans 5% onions 10% spring wheat	−$31	$557	$1,447	$633
Moderate transition	70% alfalfa 15% dry beans 5% onions 5% potatoes 5% spring wheat	$9	$706	$1,760	$795
NOTES	• Acreage allocations are illustrative examples only and are not prescriptive recommendations. Actual portfolio composition should be determined by each producer based on their land base, water rights, existing equipment, market relationships, labor capacity, and risk tolerance. Net returns are weighted and have been calculated by applying the scenario net returns (low, median, high for each crop) to the illustrative acreage weights shown. • Average Annual Return uses a 25/50/25 weighting (low/median/high) as a multi-year approximation; actual multi-year returns depend on the realized price and yield distribution. • Analysis using USDA NASS Utah Crop Production (January 2025), USDA NASS Crop Values 2024 Summary (February 2025), USDA NASS Vegetables 2024 Summary (February 2025); cost basis per USU Extension county budgets (2006) adjusted by USDA ERS input price index (1.45×, 2006–24).				

Important note: The acreage allocations in table 7 are illustrative examples, not prescriptions. The two scenarios shown were developed for analytical purposes; actual allocations will vary significantly depending on a producer's land base, existing infrastructure, market relationships, labor capacity, and risk tolerance. The table illustrates the range of outcomes that different blended portfolios can produce across low, median, and high conditions—in both scenarios modeled, alfalfa remains the majority crop.

Both blended scenarios retain alfalfa as the dominant crop, accounting for 70 percent of modeled acreage, reflecting its central role in Utah's agricultural economy. In the conservative diversification scenario, the remaining 30 percent is allocated primarily to dry beans (15%), with modest onion exposure (5%) and spring wheat as a rotation buffer (10%). In a median year, this portfolio generates an estimated +$557/acre weighted net return; even in a poor year, the loss is modest at −$31/acre, reflecting the stabilizing effect of alfalfa's relatively low cost structure. The moderate transition scenario adds a small potato allocation (5%) while reducing wheat, producing a median return of +$706/acre and remaining slightly above breakeven in a poor year (+$9/acre). The average annual return figures (+$633/acre and +$795/acre, respectively) represent a multi-year approximation that weights the median scenario most heavily and approximates figures producers would use in evaluating a multi-season planning horizon.

Both scenarios retained alfalfa as the dominant crop, a modeling structure that reflects alfalfa's foundational role in Utah's agricultural economy. **The diversification analysis presented in this report was developed in that context—not as an alternative to alfalfa production, but as an examination of how additional crop options might complement existing operations where infrastructure and market conditions allow.** The two scenarios above illustrate that portfolio-level diversification outcomes vary significantly with acreage mix, crop selection, and market conditions. As with the individual crop analysis in table 6, achieving the returns shown depends on access to buyers, processing, storage, equipment, and working capital for each crop in the portfolio.

KEY LEARNINGS FROM STAKEHOLDER ENGAGEMENT

The strategies in this report have been shaped by the key themes that emerged across the agricultural sector from statewide surveys, listening sessions, and individual interviews.

Engagement participants included farmers, ranchers, supply chain businesses, institutional buyers, and representatives from agricultural support organizations and government agencies.

Stakeholders from all twenty-nine counties weighed in on gaps and opportunities surrounding the way local food is raised, bought, and moved around the state. The survey captured input from Utah producers representing a wide range of farm types, sizes, and operations.

In addition to the survey, which reached nearly 200 Utah producers and food supply chain businesses, participants also took part in listening sessions held across the state. These sessions focused on what is working well in local food systems, what a stronger system could look like, and where investments could have the greatest impact. More than twenty-two interviews were also conducted with subject matter experts to better understand the experiences, challenges, and opportunities facing Utah producers and food businesses. Across all engagement activities, three key themes consistently emerged:

- **Local market demand and access:** Local food availability is uneven across Utah, shaped by inconsistent demand, limited market pathways, and supply chain gaps that make it harder for producers to get Utah-grown food to Utah buyers.
- **Farm and food business viability:** The financial viability of Utah producers and food businesses is under strain due to development pressure, limited access to capital and working capital, and workforce challenges, making it harder to adapt, reinvest, and grow beyond direct-to-consumer markets.
- **Program, policy, and institutional fit:** Producers and food businesses often face barriers to accessing and benefiting from agricultural programs, policies, and regulatory systems because they are not always designed around the realities of day-to-day farm and food business operations.

Table 8 summarizes the major themes and subfindings that emerged through stakeholder engagement. The discussion that follows provides additional context on each theme and what participants shared across surveys, listening sessions, and interviews.

TABLE 8: ENGAGEMENT KEY THEMES

KEY THEMES AND FINDINGS	WHY IT MATTERS
LOCAL MARKET DEMAND AND ACCESS	
Access to local food is uneven across Utah	Urban areas generally have stronger access to Utah-grown and Utah-made products, while many rural communities face more limited and inconsistent access.
Demand is inconsistent and often not strong enough to support growth	Price sensitivity and limited willingness to pay can weaken demand. Buyer expectations do not always align with what local producers can realistically provide.
Market channels are limited beyond direct-to-consumer sales	Many producers struggle to access wholesale, distributor, and institutional markets at a scale that works for their operations.
Supply chain gaps limit product availability	Infrastructure gaps in aggregation, storage, processing, and transportation reduce the volume, consistency, and seasonality of Utah-grown food in the market.
FARM AND FOOD BUSINESS VIABILITY	
Development pressure is affecting agricultural viability	Urban growth, rising land prices, and land use change are making it harder to start, expand, and retain farms and ranches.
Access to capital and cash flow are major constraints	Thin margins, limited working capital, and financial risk reduce the ability of producers and food businesses to reinvest, diversify, and grow.
Market uncertainty limits expansion	Without stronger buyer commitment and more reliable market opportunities, producers and food businesses are less likely to scale or pursue new products and market channels.
Workforce challenges affect long-term viability	Labor shortages, limited affordable housing, physically demanding work, and gaps in training and mentorship make it harder to sustain and grow operations.
PROGRAM, POLICY, AND INSTITUTIONAL FIT	
Programs do not always fit operational realities	Program structures, timelines, and requirements often do not align with the scale, seasonality, and day-to-day realities of farms and food businesses, especially smaller and diversified operations.
Administrative burden limits participation	Limited staff capacity, time, and skills make it difficult for many producers and food businesses to apply for and manage programs.
Navigation and technical assistance gaps reduce access	Stakeholders value existing programs but need clearer guidance, stronger outreach, and more tailored support to understand and use them effectively.
Certification and compliance requirements create barriers	Food safety, labeling, testing, and processing requirements can be costly and difficult to navigate, especially for small and value-added businesses.

LOCAL MARKET DEMAND AND ACCESS

Through engagement, participants consistently described local food availability in Utah as uneven across the state and in markets beyond direct-to-consumer. Stakeholders shared that urban areas tend to have stronger access to Utah-grown and Utah-made products through farmers markets, grocery stores, restaurants, and other outlets, while many rural communities face more limited and less consistent access. They emphasized that these differences are shaped not only by where demand is strongest but also by how easily products can move from farms and ranches to local markets. Overall, the findings point to an opportunity to expand the availability of Utah products, alongside a need for stronger market connections.

Participants also described local demand as inconsistent and often not strong enough to support producer growth. They noted that price sensitivity and limited willingness to pay often mean that consumer and buyer expectations do not align with what local producers can realistically provide in terms of price, seasonality, and year-round availability. Stakeholders said that without stronger and more consistent buyer commitment, small and mid-sized producers are strained to diversify, expand production, or invest in new market opportunities.

Stakeholders also highlighted underdeveloped market channels and supply chain gaps that make it harder for Utah-grown food to reach Utah buyers. Outside of direct-to-consumer sales, many producers struggle to access wholesale, institutional, and distributor markets at a scale that works for their operations. Participants also pointed to gaps in aggregation, cold and frozen storage, processing, and transportation that limit the volume, consistency, and seasonality of local food in the market. These concerns were especially common among produce and meat producers, who noted higher risks of food waste, limited processing options, and added costs when products must leave the state for processing before returning to Utah markets. These concerns closely aligned with the economic analysis, which also identified significant needs in aggregation, storage, processing, distribution, and other mid-supply-chain infrastructure across Utah.

FARM AND FOOD BUSINESS VIABILITY

These market demand and supply chain challenges shape not only local food availability but also the ability of producers and food businesses to remain financially viable and grow. Stakeholders shared that it is becoming harder to remain financially stable, respond to changing conditions, and grow operations over time. Many pointed to rising costs, market uncertainty, and limited ability to reinvest. At the same time, participants identified opportunities to strengthen long-term viability through targeted public and private investment in infrastructure, business support, and market development that can help producers move beyond direct-to-consumer sales and reach wholesale, mid-supply-chain, and institutional markets. These findings helped shape the investment strategies in this report by pointing to where added capacity and support could have the greatest impact.

A major theme was the growing pressure that development is placing on agriculture, especially in fast-growing parts of the state. Participants described urban expansion as increasing conflict between agricultural operations and nearby development, while also driving up land prices and making it harder to start, expand, or retain farms and ranches. Stakeholders also raised concerns about the aging farm population and the lack of succession planning tools and incentives to help transition operations to the next generation. Without stronger support for farm transition and land access, participants noted that more agricultural land may be lost to development, reducing the long-term availability of working farmland in Utah.

Stakeholders also emphasized that access to capital, cash flow, and workforce capacity are major barriers to sustaining and growing operations. Thin profit margins and pricing pressure make it difficult to modernize equipment, reinvest in facilities, or take on the risk of diversification. Participants noted that the challenge is not only access to loans, but also access to working capital and reliable revenue to manage day-to-day cash flow and growth. Workforce concerns were raised across the food system, including labor shortages driven by low wages, physically demanding work, limited affordable housing, and a lack of training and mentorship opportunities. Together, these challenges make it harder for producers and food businesses to remain viable and limit the sector's ability to adapt and grow.

PROGRAM, POLICY, AND INSTITUTIONAL FIT

Participants' openness and strong engagement underscored the value they see in existing agricultural programs and support systems. At the same time, their feedback highlighted clear opportunities to improve how those programs and supports are accessed, navigated, and used in practice. Producers and food businesses expressed strong interest in resources, technical assistance, and financial support, and many saw value in existing programs. At the same time, stakeholders described a mismatch between how programs are designed and how farming and food businesses actually operate. They emphasized that when programs are easier to understand, more responsive to producer needs, and paired with clear guidance, they are more likely to be used and trusted.

A common concern was that many programs and incentives do not fit the scale, timing, or financial realities of small and diversified producers. Participants shared that match requirements, grant structures, and application processes can exclude early-stage and undercapitalized businesses. They also noted that timelines often do not align with the farming calendar, making participation harder during peak production seasons. Many producers said they do not have extra staff, time, or skills to manage complex applications and reporting requirements. As a result, even useful programs may go underused, and some participants said burdensome or unclear processes discourage future participation.

Stakeholders also highlighted certification and regulatory requirements as barriers to growth and diversification. Participants described food safety certifications, labeling rules, testing requirements, and processing approvals as costly and difficult to navigate, especially for small producers and value-added businesses. Some noted that certifications such as GAP can require substantial time and expense, even when buyers do not consistently reward that investment. Participants generally did not point to specific regulations that should be removed or revised. Instead, they more often emphasized the need for better support to understand and navigate the many layers of requirements, approvals, and compliance expectations involved in growing and selling food products. They also pointed to unclear or conflicting rules around food safety, processing, and waste handling that create uncertainty at key stages of business growth and can delay expansion, discourage innovation, and limit market access.

RECOMMENDED STRATEGIES FOR STRENGTHENING UTAH'S AGRICULTURAL SYSTEM

The strategies in this report were developed through in-depth analysis of key stakeholder input—including farmers, ranchers, and supply chain business owners, this study's findings, and approaches used in other communities—and shaped through guidance from the project advisory committee and UDAF staff.

Together, they respond to the main challenges identified through the study and the accompanying stakeholder engagement and focus on practical ways to strengthen Utah's agricultural economy, support producers and food businesses, and improve how local food moves through the supply chain. The strategies also align with and build on priorities already identified in UDAF's strategic plan, helping connect these recommendations to the department's broader goals for strengthening Utah agriculture.

The final set of strategies fall into two categories: programming strategies focus on improving or expanding programs, services, staffing, and coordination, while funding strategies focus on investment and financing tools that provide direct support to producers, food businesses, and key partners. Many of the recommended strategies build on existing efforts, while others introduce new solutions to address gaps and strengthen Utah's agricultural system.

The table below provides a high-level summary of each strategy, including the challenges it addresses, the lead UDAF division, and how it aligns with UDAF's Strategic Plan. Implementation will ultimately be carried out through partnerships among the agencies, local governments, producers, businesses, and partner organizations best positioned to advance the work, with UDAF serving in a lead or supporting role depending on the strategy.

More detailed descriptions, implementation considerations, and potential actions follow in the main report below.

NO.	STRATEGY	CHALLENGES ADDRESSED	UDAF STRATEGIC PLAN GOAL ALIGNMENT
PROGRAMMING STRATEGIES			
1	Strengthen statewide market development, business support, and supply chain coordination to better connect producers, buyers, processors, investors, and local governments while improving UDAF's capacity to align supply, market demand, financing, and technical assistance across Utah's agricultural supply chains.	Market channel development Infrastructure gaps Land and production barriers Workforce challenges	Agristructure Workforce Supply chain Customer service
2	Expand outreach and improve access to information on UDAF's voluntary, incentive-based initiatives, such as UDAF's Agricultural Water Optimization and the Soil Health Program, which consists of the Agricultural Voluntary Incentive Program and the Utah Soil Health Partnership.	Land and production barriers	Agristructure
3	Support and strengthen education, training, and business development programs that equip current and future producers.	Market channel development Workforce challenges	Agristructure Workforce Education
4	Develop a strategic investment framework for supply chain infrastructure. (Tied to funding strategies #1 and #4.)	Market channel development Infrastructure gaps	Agristructure Supply chain
5	Strengthen incentives to participate in Utah's Own to increase producer enrollment and expand promotion of Utah-grown products.	Market channel development	Supply chain
6	Strengthen Utah Farm to Fork program support through technical assistance, coordination, and permanent UDAF staffing.	Market channel development	Supply chain
7	Expand access to agricultural land protection and succession planning tools by increasing awareness, coordination with partners, and clearer guidance around agricultural protection areas, conservation easements, and succession planning resources.	Market channel development Workforce challenges	Land use
8	Improve producer and food business access to food safety and market certifications by expanding technical assistance and navigation support for GAP, HACCP, GMP, and organic certification processes. (Tied to funding strategy #3.)	Market channel development Workforce challenges	Agristructure Supply chain

NO.	STRATEGY	CHALLENGES ADDRESSED	UDAF STRATEGIC PLAN GOAL ALIGNMENT
FUNDING STRATEGIES			
1	Source ongoing funding to expand access to local foods for communities while creating consistent, reliable market opportunities for Utah producers and food businesses.	Market channel development Infrastructure gaps	Agristructure Education
2	Expand and sustain funding for local food incentive and purchasing programs by increasing support for initiatives such as Double Up Food Bucks, farm-to-school efforts including the Utah Farm to Fork program, and local food purchasing programs.	Market channel development	Supply chain
3	Establish certification cost-share support for organic, GAP, HACCP, and GMP pathways to reduce barriers for producers and food businesses and improve access to higher-value markets, stronger market positioning, and increased revenue. (Tied to programming strategy #8.)	Market channel development	Agristructure Supply chain
4	Establish a revolving loan program to support agricultural producers and food businesses in financing infrastructure needed for business development, market access, and expansion.	Market channel development Infrastructure gaps	Supply chain

Department *of* Agriculture and Food

Programming Strategy #1:

Strengthen statewide market development, business support, and supply chain coordination to better connect producers, buyers, processors, investors, and local governments while improving UDAF's capacity to align supply, market demand, financing, and technical assistance across Utah's agricultural supply chains.

CHALLENGES ADDRESSED:

- ✓ **Market Channel Development**
- ✓ **Infrastructure Gaps**
- ✓ **Land Access Barriers**
- ✓ **Workforce Challenges**

IMPLEMENTATION TYPE:

- ✓ **Builds upon existing State resources**
- ✓ **New Initiative**

UDAF STRATEGIC PLAN GOAL ALIGNMENT:

- ✓ **Agristructure**
- ✓ **Customer Service**
- Education
- Land Use
- ✓ **Supply Chain**
- ✓ **Workforce**

OVERVIEW:

Securing and maintaining dedicated capacity for market development and business support is necessary to sustain existing programming and strengthen UDAF's ability to support producers and mid-supply chain businesses. Stable staffing would help producers and food businesses access new markets, grow viable enterprises, navigate regulatory and certification requirements, and connect with training, technical assistance, and educational resources. It would also improve awareness and use of existing programs and make services more accessible to operations of different types and sizes.

This strategy would build on existing work by adding a new statewide supply chain coordination function as part of UDAF's broader market development efforts. This added capacity would strengthen connections among producers, buyers, processors, distributors, investors, local governments, and partner organizations to better align production, market demand, financing, technical assistance, and infrastructure investment. It would also help address gaps in aggregation, processing, distribution, and other mid-supply chain functions that limit market access and business growth. Implementing this strategy would require an estimated $250,000 annually to fund and sustain two full-time positions.

KEY FUNCTIONS OF THE NEW UDAF POSITIONS:

- Support development of coordinated and centralized aggregation options (e.g., food hubs) that allow buyers to purchase Utah-grown and Utah-processed products at the volume and consistency they need.
- Develop and maintain sourcing tools, including a producer directory and related market access resources, to help buyers identify local products and help producers connect to new market opportunities.
- Develop and manage a strategic infrastructure investment pipeline to align public and private investment with priority gaps and opportunities in aggregation, processing, distribution, and related facilities (see Programming Strategy #4).
- Re-establish and coordinate regular convenings across UDAF divisions, partner agencies, and agricultural support organizations to strengthen communication, alignment, and ongoing collaboration across the agricultural support system.

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Programming Strategy #2:

Expand outreach and improve access to information on UDAF's voluntary, incentive-based initiatives, such as UDAF's Agricultural Water Optimization and the Soil Health Program, which consists of the Agricultural Voluntary Incentive Program and the Utah Soil Health Partnership.

CHALLENGES ADDRESSED:

- Market Channel Development
- Infrastructure Gaps
- ✓ **Land Access Barriers**
- Workforce Challenges

IMPLEMENTATION TYPE:

- ✓ **Builds upon existing State resources**
- New Initiative

UDAF STRATEGIC PLAN GOAL ALIGNMENT:

- ✓ **Agristructure**
- Customer Service
- Education
- Land Use
- Supply Chain
- Workforce

OVERVIEW:

Expanding outreach and improving access to information on voluntary, incentive-based initiatives such as UDAF's Agricultural Water Optimization and the Soil Health Program, which consists of the Agricultural Voluntary Incentive Program and the Utah Soil Health Partnership, can help more producers understand and utilize programs designed to support agricultural viability and resource stewardship. The partnership is co-managed by UDAF and the Utah Association of Conservation Districts (UACD), with guidance from an external advisory committee and grant oversight from the Natural Resources Conservation Service (NRCS). Increased communication through trusted intermediaries like producer networks, extension partners, conservation districts, and agricultural organizations can raise awareness of these programs, including eligibility, application timelines, and potential benefits. Clear, accessible information and targeted outreach can help producers better understand the voluntary programs available to them and determine whether those options fit their operational goals.

Improving outreach and access can also increase program participation, which strengthens each program's return on public investment and facilitates broader adoption of practices that improve soil health, water quality, and crop productivity. Strengthening outreach efforts can also help reduce barriers to participation and improve the overall reach and effectiveness of these initiatives.

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Programming Strategy #3:

Support and strengthen education, training, and business development programs that equip current and future producers.

CHALLENGES ADDRESSED:

- ✓ **Market Channel Development**
- Infrastructure Gaps
- Land Access Barriers
- ✓ **Workforce Challenges**

IMPLEMENTATION TYPE:

- ✓ **Builds upon existing State resources**
- New Initiative

UDAF STRATEGIC PLAN GOAL ALIGNMENT:

- ✓ **Agristructure**
- Customer Service
- ✓ **Education**
- Land Use
- Supply Chain
- ✓ **Workforce**

OVERVIEW:

Strengthening agricultural workforce and business development pathways helps address barriers to entering, sustaining, and growing agricultural enterprises. Producers and food businesses face challenges related to land access, capital needs, succession, labor shortages, and limited training and mentorship opportunities. Comprehensive programs that integrate business education, entrepreneurship, and market development help build stronger business skills, improve financial management, expand sales channels, and improve readiness to navigate funding and financing opportunities. Supporting these skills across the workforce pipeline also strengthens agricultural career pathways and prepares current and future producers to respond to changing market conditions and business opportunities.

KEY STEPS FOR IMPLEMENTATION:

- Support the USU E-commerce Accelerator program to help producers develop online sales channels, strengthen digital marketing skills, and reach new markets.
- Integrate business development and entrepreneurship into Future Farmers of America (FFA) curriculum to strengthen agricultural career pathways and prepare future producers with foundational business and market skills.
- Support partner development, coordination, and communication of mentorship, apprenticeship, and other applied learning opportunities for new and early-career producers.
- Strengthen UDAF's role in supporting business training and technical assistance in areas such as farm business management, financing, succession planning, and value-added enterprise development. This includes providing outreach and guidance for existing programs such as UDAF's Succession Planning and Agricultural Land Transfer and UDAF agricultural loan programs (Agriculture Resource Development Loan [ARDL], Rural Rehabilitation Loans, and Emergency Disaster Relief Loans).

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Programming Strategy #4:

Develop a strategic investment framework for supply chain infrastructure.

CHALLENGES ADDRESSED:

- ✓ **Market Channel Development**
- ✓ **Infrastructure Gaps**
- Land Access Barriers
- Workforce Challenges

IMPLEMENTATION TYPE:

- Builds upon existing State resources
- ✓ **New Initiative**

UDAF STRATEGIC PLAN GOAL ALIGNMENT:

- ✓ **Agristructure**
- Customer Service
- Education
- Land Use
- ✓ **Supply Chain**
- Workforce

OVERVIEW:

Separate to initiatives like the Food Security Grant and other direct funding efforts, this strategy focuses on mapping the landscape of funding opportunities across the whole state—from public and private sources—and identifying gaps to identify future funding priorities. This includes developing and tracking a pipeline of projects and assessing potential grants, loans, tax incentives, and private investment sources to support project development. Public and private funders can use the framework to inform their funding priorities, eligibility criteria, and investment parameters. The framework helps producers and/or business operators make strategic decisions about the scale, location, timing, and sequencing of investments, while enabling their projects to better leverage and stack capital across funding sources.

The framework would guide investments based on clear objectives, such as improving rural county connectivity, addressing infrastructure barriers that limit business growth and market development, supporting farm-to-school purchasing, and strengthening Utah-based businesses. This strategy also supports better leveraging existing public funding tools (e.g., Food Security Grant Program) for infrastructure development as well as evaluating infrastructure development outcomes to demonstrate impact, guide future investments, and refine programs over time as needs and market conditions shift.

This study identified several investment priorities and implementation tools to inform development of the framework:

- Total estimated infrastructure investment needs of $80–90 million, which includes
- $65 million for gaps in large-scale processing capacity
- $15–30 million for mid-supply chain infrastructure such as co-packing, cold storage, organic grain handling, and equipment cooperatives
- Three regional investment profiles covering all twenty-nine counties to help target infrastructure strategies based on local conditions:
  - (1) production-rich but infrastructure-limited counties,
  - (2) hub counties with existing processing infrastructure, and
  - (3) urban-adjacent counties
- Ongoing assessment of UDAF Food Security Grant program outcomes and funding distribution to inform future investments, improve program design, and better align public funding with priority infrastructure needs

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Programming Strategy #5:

Strengthen incentives to participate in Utah's Own to increase producer enrollment and expand promotion of Utah-grown products.

CHALLENGES ADDRESSED:

- ✓ **Market Channel Development**
- Infrastructure Gaps
- Land Access Barriers
- Workforce Challenges

IMPLEMENTATION TYPE:

- ✓ **Builds upon existing State resources**
- New Initiative

UDAF STRATEGIC PLAN GOAL ALIGNMENT:

- Agristructure
- Customer Service
- Education
- Land Use
- ✓ **Supply Chain**
- Workforce

OVERVIEW:

Expanding participation in Utah's Own increases opportunities for producers and food businesses to promote locally grown and produced products and connect with consumers and buyers. Greater participation strengthens the visibility of Utah-grown products, supports statewide branding and marketing efforts, and helps producers reach new customers and market channels. It also increases the effectiveness of Utah's Own as a tool for promoting Utah's agricultural sector and supporting local food system development.

KEY CONSIDERATIONS:

Improving participation in Utah's Own may require a broader incentive structure that increases the overall value of membership for producers and food businesses. This can include stronger promotional benefits through state marketing campaigns and directories, better connections to buyers through sourcing guides and matchmaking opportunities, access to marketing tools and technical assistance, cost-share support for branding and promotion activities, and simpler enrollment and renewal processes. An evaluation and revision to the membership fee structure may also help reduce participation barriers, particularly for small, mid-sized, and rural producers, but should be considered alongside other strategies that strengthen the practical value of the program.

Utah's Own offers more benefits than many similar state programs, but participation depends on whether producers and food businesses find those benefits useful. Review of former Utah's Own members found that 86 percent left because the program did not meet their business needs. This suggests that participation is shaped not just by the cost of joining but also by the overall perceived value. Enhancements that may help strengthen participation and retention include member-only marketing channels (e.g., website or social media), featured placement in blogs or newsletters, the ability to update online member profiles, and discounts on supplies or other services.

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Programming Strategy #6:

Strengthen Utah Farm to Fork program support through technical assistance, coordination, and permanent UDAF staffing.

CHALLENGES ADDRESSED:

- ✓ **Market Channel Development**
- ✓ **Infrastructure Gaps**
- Land Access Barriers
- Workforce Challenges

IMPLEMENTATION TYPE:

- ✓ **Builds upon existing State resources**
- New Initiative

UDAF STRATEGIC PLAN GOAL ALIGNMENT:

- Agristructure
- Customer Service
- Education
- Land Use
- ✓ **Supply Chain**
- Workforce

OVERVIEW:

Strengthening Utah Farm to Fork program support would help address both the practical barriers schools and producers face and the broader supply chain gaps that limit institutional purchasing from local producers. Although many Utah schools already participate in farm-to-school activities, sourcing Utah products consistently can be difficult due to limited staff capacity, budget constraints, procurement complexity, and challenges accessing products in the volumes, forms, and delivery schedules schools require. Through its partnership with the Utah State Board of Education (USBE), targeted expansions to UDAF's program capacity would provide more consistent support, coordination, and resources to school food service providers and producers statewide.

This support could include technical assistance on procurement, contracting, food safety, pricing, product specifications, and seasonality; coordination to connect schools with producers, processors, and distributors; and practical tools that make local sourcing easier for districts with limited staff time and experience. Expanded UDAF staffing could also help align farm-to-fork efforts with broader market development and infrastructure strategies by identifying recurring supply chain gaps, coordinating with partners, and helping schools and producers navigate funding and purchasing opportunities. Together, these efforts would strengthen Utah Farm to Fork not only as a nutrition and education initiative, but also as a market development strategy that creates more reliable institutional demand for Utah producers.

KEY STEPS FOR IMPLEMENTATION:

- Secure permanent state funding for UDAF's existing Utah Farm to Fork coordination position to provide statewide technical assistance and outreach to school districts, producers, and partners. This position has been grant-supported to date and is not currently secured through ongoing state funding. Sustaining the position requires an annual state appropriation of $112,000 for one full-time employee.
- Develop and expand procurement tools and guidance for schools and producers, including product specification sheets, seasonal availability guides, pricing resources, sample bid language, and food safety guidance.
- Create more structured matchmaking and relationship-building between school food buyers, producers, processors, and distributors.
- Support stronger regional aggregation, processing, and distribution pathways, along with Utah's Own program, so schools can more easily source Utah products in the volume, format, and delivery schedules they need.
- Identify and address school capacity gaps through training, peer learning, and technical assistance tailored to districts with limited staff time or procurement experience.

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Programming Strategy #7:

Expand access to agricultural land protection and succession planning tools by increasing awareness, coordination and clearer guidance around agricultural protection areas, conservation easements, and succession planning resources.

CHALLENGES ADDRESSED:

- Market Channel Development
- Infrastructure Gaps
- ✓ **Land Access Barriers**
- Workforce Challenges

IMPLEMENTATION TYPE:

- ✓ **Builds upon existing State resources**
- New Initiative

UDAF STRATEGIC PLAN GOAL ALIGNMENT:

- Agristructure
- Customer Service
- Education
- ✓ **Land Use**
- Supply Chain
- Workforce

OVERVIEW:

Expanding access to agricultural land protection and succession planning tools would help preserve working agricultural lands and support the long-term viability of farming in Utah. Greater awareness and use of tools such as agricultural protection areas, conservation easements, and succession planning resources can help producers and landowners plan for the future of their operations and keep land in agricultural use. Stronger coordination among state agencies, counties, land trusts, and producers would improve how these tools are applied and help better target land protection efforts in areas facing the greatest development pressure.

This strategy could also include stronger transparency, oversight, and guidance related to public funding used for agricultural land protection in connection with Utah's Farmland Assessment Act, including rollback-related funding. Clearer state guidance for counties' use of rollback funds on eligible uses, funding criteria, and evaluation would reduce inconsistent interpretation across counties and improve the effectiveness of these investments. Improved access to information, technical assistance, and succession planning support would also help producers navigate available options, make informed decisions about the future of their land, and support long-term stewardship while maintaining the availability of agricultural land.

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Programming Strategy #8:

Improve producer and food business access to food safety and market certifications by expanding technical assistance and navigation support for GAP, HACCP, GMP, and organic certification processes.[1]

CHALLENGES ADDRESSED:

- ✓ **Market Channel Development**
- Infrastructure Gaps
- ✓ **Land Access Barriers**
- Workforce Challenges

IMPLEMENTATION TYPE:

- ✓ **Builds upon existing State resources**
- New Initiative

UDAF STRATEGIC PLAN GOAL ALIGNMENT:

- ✓ **Agristructure**
- Customer Service
- Education
- Land Use
- ✓ **Supply Chain**
- Workforce

OVERVIEW:

Improving access to food safety and market certifications through technical assistance and navigation support would help more Utah producers and food businesses understand certification requirements, prepare for audits and inspections, and identify the certification pathways most relevant to their products, buyers, and stage of growth. Certifications such as GAP, HACCP, GMP, and organic can be difficult to navigate, especially for smaller and newer operations that may have limited staff capacity or experience with regulatory processes. Expanding UDAF's role in providing hands-on guidance, education, and one-on-one support would help reduce confusion, improve readiness, and make certification more attainable.

This support could help producers and food businesses better position themselves for retail, institutional, wholesale, and value-added markets that require or prefer certified suppliers. Additionally, pairing UDAF's technical assistance with cost-share program support (see Funding Strategy #3) could help more producers and food businesses overcome these barriers, expand market access, and better position themselves to sell into retail and broader distribution channels.

KEY STEPS FOR IMPLEMENTATION:

- Increase dedicated staffing within UDAF to provide technical assistance and certification support for organic and food safety certifications. This requires $112,000 annually for one full-time employee.
- Provide navigation support to help producers understand which certifications are required or most valuable for different market channels.
- Develop a cost-share program in which UDAF covers a portion of certification fees for GAP, HACCP, GMP, and organic certification.
- Track participation and outcomes to assess whether certification support is helping producers expand sales and access new buyers.

[1] GAP (Good Agricultural Practices) focuses on on-farm food safety. HACCP (Hazard Analysis and Critical Control Points) is a system for identifying and controlling food safety risks during processing. GMP (Good Manufacturing Practices) refers to standards for safe food manufacturing, processing, packing, and handling. Organic refers to certification under federal organic standards.

Department *of* Agriculture and Food

Funding Strategy #1:

Source ongoing funding to expand access to local foods for communities while creating consistent, reliable market opportunities for Utah producers and food businesses.

CHALLENGES ADDRESSED:

- ✓ **Market Channel Development**
- ✓ **Infrastructure Gaps**
- Land Access Barriers
- Workforce Challenges

IMPLEMENTATION TYPE:

- ✓ **Builds upon existing State resources**
- New Initiative

UDAF STRATEGIC PLAN GOAL ALIGNMENT:

- ✓ **Agristructure**
- Customer Service
- Education
- Land Use
- ✓ **Supply Chain**
- Workforce

OVERVIEW:

This strategy would build on the results and lessons learned from the Utah Food Security Grant (UFSG) program and the study's findings, identifying an estimated $80–95 million in targeted agricultural infrastructure investment that could help address gaps limiting producers and the supply chain. Securing ongoing funding would provide more stable and predictable support for food access organizations, producers, and food businesses, reducing uncertainty associated with one-time or intermittent funding cycles. Aligning any ongoing appropriation of funds with other state and federal efforts, including Utah Farm to Fork, food bank purchasing, and local food incentive programs, would further strengthen coordination and increase overall impact.

The Utah Food Security Grant (UFSG) program has already demonstrated value as a state investment in both community food access and local food system capacity. Since 2022, the Legislature has approved $1 million for the program each year, providing an important – though not yet permanent – funding source for equipment and other investments that strengthen local food system capacity across Utah. From 2022 to 2025, the program invested $4,082,720 through 88 awards to Utah producers and food businesses, with grant amounts ranging from $1,700 to $200,000. Most awards supported equipment purchases that expanded capacity to produce, process, store, or distribute food. Among the 52 award recipients with pre- and post-grant capacity data, grants were associated with substantial gains in production capacity, including median increases of 63% for meat processing, 95% for fruit and vegetable operations, and 300% for dairy operations. These outcomes indicate the program has been effective in helping producers and food businesses strengthen and scale their operations. This study identified an estimated $80–95 million in targeted agricultural infrastructure investment that could help address gaps limiting producers' access to value-added markets, price premiums, and institutional buyers. In addition to infrastructure investments, ongoing support for technical assistance, market development, and value chain coordination will be needed to help producers, processors, distributors, and buyers build regional supply chains and maximize the impact of these investments.

Department *of* Agriculture and Food

Funding Strategy #2:

Expand and sustain funding for local food incentive and purchasing programs by increasing support for initiatives such as Double Up Food Bucks, farm-to-school efforts including the Utah Farm to Fork program, and local food purchasing programs.

CHALLENGES ADDRESSED:

- ✓ **Market Channel Development**
- ✓ **Infrastructure Gaps**
- ✓ **Land Access Barriers**
- ✓ **Workforce Challenges**

IMPLEMENTATION TYPE:

- ✓ **Builds upon existing State resources**
- New Initiative

UDAF STRATEGIC PLAN GOAL ALIGNMENT:

- ✓ **Agristructure**
- ✓ **Customer Service**
- Education
- Land Use
- ✓ **Supply Chain**
- ✓ **Workforce**

OVERVIEW:

This strategy strengthens and sustains funding for programs such as Double Up Food Bucks, farm-to-school efforts including the Utah Farm to Fork program, and local food purchasing initiatives by building on existing program data, refining funding priorities, and identifying opportunities for sustained funding. These programs play an important role in improving access to local food for communities while creating reliable market opportunities for Utah producers and food businesses. Stronger alignment with other UDAF-supported programs and initiatives can also further maximize impact, reduce duplication, and improve coordination across related efforts.

A stronger and more stable funding approach is needed to maintain these programs over time and respond to demand. This includes identifying and leveraging a mix of state, local government, federal, philanthropic, and private funding sources to expand and stabilize support. It also includes filling gaps when federal funds are reduced or insufficient for program needs, helping ensure that successful programs are not disrupted by changing funding conditions. Philanthropic and private funding partners may also help fill funding gaps, match public dollars, or expand successful models that demonstrate strong community and economic benefit.

IMPLEMENTATION CONSIDERATIONS:

Tracking and clearly communicating outcomes will be central to sustaining support for these programs. Measures such as economic impact, producer revenue, institutional purchasing, local food distribution, and market development can help demonstrate the broader value of these investments to communities, producers, and the state economy. Consistent, clear outcome data can also inform future funding decisions, strengthen the case for ongoing appropriations, and help attract additional public and private investment over time.

Department *of* Agriculture and Food

Funding Strategy #3:

Establish certification cost-share support for GAP, HACCP, GMP, and organic pathways to reduce barriers for producers and food businesses and improve access to higher-value markets, stronger market positioning, and increased revenue.

CHALLENGES ADDRESSED:

- ✓ **Market Channel Development**
- Infrastructure Gaps
- ✓ **Land Access Barriers**
- Workforce Challenges

IMPLEMENTATION TYPE:

- Builds upon existing State resources
- ✓ **New Initiative**

UDAF STRATEGIC PLAN GOAL ALIGNMENT:

- ✓ **Agristructure**
- Customer Service
- Education
- Land Use
- ✓ **Supply Chain**
- Workforce

OVERVIEW:

Establishing certification cost-share support would help address one of the most common barriers producers and food businesses face in pursuing food safety and market certifications: cost. Certifications such as GAP, HACCP, and GMP, and organic can require significant annual expenses for audits, inspections, consulting, recordkeeping systems, and related improvements, which can be particularly difficult for small, beginning, and scaling operations to absorb. These costs can delay or prevent businesses from pursuing certifications even when those certifications are necessary to access retail, institutional, wholesale, or other higher-value markets.

Cost-share support could help reduce upfront financial risk and make certification more attainable, enabling producers and food businesses to pursue new market opportunities that might otherwise be out of reach. This is particularly important for certifications such as GAP, which are often required by retailers and distributors, but can be costly for farms that do not yet have secured buyers. In addition, changes or reductions in federal funding for organic certification cost-share programs can leave producers with fewer resources to offset those expenses. A state-level cost-share program could help fill these gaps, support business growth, and improve market access by enabling more producers and food businesses to meet buyer requirements and compete in higher-value channels.

This strategy aligns closely with Programming Strategy #8, which focuses on technical assistance and navigation support for certification pathways. Together, these strategies address both the technical and financial barriers that limit participation, helping more producers and food businesses successfully pursue and maintain certifications.

Department *of* Agriculture and Food

Funding Strategy #4:

Establish a revolving loan program to support agricultural producers and food businesses in financing infrastructure needed for business development, market access, and expansion.

CHALLENGES ADDRESSED:

- ✓ **Market Channel Development**
- ✓ **Infrastructure Gaps**
- Land Access Barriers
- Workforce Challenges

IMPLEMENTATION TYPE:

- Builds upon existing State resources
- ✓ **New Initiative**

UDAF STRATEGIC PLAN GOAL ALIGNMENT:

- Agristructure
- Customer Service
- Education
- Land Use
- ✓ **Supply Chain**
- Workforce

OVERVIEW:

Establishing a bridge lending and working capital revolving loan program would help address key financing gaps that limit business development, market access, and infrastructure expansion across Utah's agricultural supply chain. The program would support agricultural producers as well as food supply chain businesses, including processors, co-packers, distributors, and other mid-supply chain enterprises, that often face challenges securing capital for facility improvements, equipment, working capital, or market expansion. These financing needs are not fully met by existing Conservation Division loan programs (Agriculture Resource Development Loan program) as they extend beyond on-farm producer support and focus more directly on supply chain development and infrastructure needs.

This type of program would require an initial state investment to capitalize the loan fund and begin issuing loans. Over time, as borrowers repay their loans, those funds would return to the program and be re-lent to new borrowers, creating an ongoing source of capital. This revolving structure reduces the need for annual appropriations while maintaining support for future projects. Additional appropriations could still be used over time to expand the fund or respond to demand, but loan repayments would help sustain the program over the long term.

IMPLEMENTATION CONSIDERATIONS:

To improve administration and borrower access, the program could be structured as a partnership between UDAF and a lending institution, such as a community development financial institution or other qualified lending partner. Under this model, the lending partner would manage loan applications, underwriting, loan servicing, and borrower support, while UDAF would oversee program design, provide funding, and align the program with state agricultural and food system goals. This approach leverages lending expertise while offering more flexible financing and support for borrowers who may not fit conventional lending standards, including beginning producers, smaller businesses, and underserved operations.

KEY STEPS FOR IMPLEMENTATION:

- Establish a dedicated revolving loan fund to provide ongoing capital for agricultural producers and food supply chain businesses.
- Define eligible uses for financing, such as working capital, equipment, facility improvements, market expansion, and infrastructure development.
- Structure the program through a partnership between UDAF and a qualified lending partner to manage underwriting, loan origination, servicing, and borrower support.
- Pair lending with technical assistance to help borrowers assess readiness, strengthen business plans, and navigate the application process.
- Prioritize access for businesses and projects that fill identified supply chain gaps and strengthen Utah-based market infrastructure.

NEXT STEPS

The strategies in this report reflect a set of recommendations that were developed and refined based on research, stakeholder input, and assessment of both potential impact and feasibility.

Together, they identify practical opportunities to strengthen programs, improve coordination, target investments, and expand funding tools that support producers, food businesses, and Utah's agricultural supply chains.

A next step for UDAF and partners is to use these strategies to guide implementation planning and prioritization, including identifying near-term actions, clarifying partner roles, and aligning funding and staffing needs. Reestablishing regular partner convenings should be a central component of this next phase of work. Bringing together state agencies, counties, educational institutions, and agricultural organizations on a regular basis can improve communication, reduce duplication, strengthen coordination across programs and funding opportunities, and help partners respond more effectively to emerging needs and opportunities.

As implementation moves forward, UDAF and its partners can use the study findings and strategy framework to guide work planning, collaboration, and investment decisions. Over time, regular convening and coordination will lay the groundwork for a more formal structure for long-term collaboration around shared agricultural and food system goals. Ongoing tracking of outcomes will be important to show progress, improve programs over time, and support continued public and private investment.

Utah has important assets to build on, including generations of agricultural knowledge, a deep commitment to the land, and strong communities invested in the future of agriculture. Continued action will be needed to address the gaps that limit producer success, business growth, and community access to Utah-grown and -produced foods. The recommendations in this report will strengthen existing efforts and provide a roadmap to guide future programs, partnerships, and investments that support the long-term resilience of Utah agriculture.

GLOSSARY

COMMUNITY SUPPORTED AGRICULTURE (CSA)
A CSA involves consumers who support a farmer financially by paying for a share of the farm's production prior to each growing season. The arrangement allows farmers to buy the seeds, transplants, and other inputs they need for the growing season and pay their farm labor without waiting until harvest to generate revenue. The customers will share in the farmer's successes or failures.

CO-PACKER (CONTRACT PACKER)
In the food industry, co-packing, or contract packaging, is when a company outsources the packaging and sometimes the production of their food and beverage products to a third-party company. Co-packers can make it easier for small food businesses to grow, without the need for investing in their own larger scale processing infrastructure.

DOUBLE UP FOOD BUCKS
A program that doubles the value of federal SNAP benefits spent at participating markets and food retail stores, helping people bring home more healthy fruits and vegetables while supporting local farmers.

FARM TO SCHOOL
Farm to school is an initiative that aims to connect communities, through schools, with healthy, local food. Farm-to-school programs also aim to support local farmers.

FOOD ACCESS
Food access means having reliable, affordable, and convenient ways to get healthy, safe, and culturally appropriate foods. Barriers to food access can include cost, transportation, store location, and availability of healthy, safe, and culturally appropriate food.

FOOD HUB
A business or organization that actively manages the aggregation, distribution, and marketing of source-identified food products, primarily from local and regional producers, to strengthen their ability to satisfy wholesale, retail, and institutional demand.

FOOD SECURITY
Food security is when all people, at all times, have physical, social, and economic access to enough safe, nutritious, and culturally appropriate food to lead active and healthy lives.

FOOD SYSTEM
The process food follows as it moves from the farm to your table. It encompasses a range of activities, including growing, foraging, and ranching; processing; transporting and distributing; retailing and marketing; preparation and cooking; eating; waste management; safety; land and water stewardship; and environmental preservation. The journey food takes through the food system is influenced by the ecosystem, research, education, funding, policies, and a community's rich cultural traditions.

FOOD SYSTEM INFRASTRUCTURE
Food system infrastructure includes the physical infrastructure and organizational capacities needed for food to move from farm to table. Examples include food hubs, processing facilities, cold storage, trucks, markets, and the technologies that connect producers, distributors, and consumers.

ORGANIC
USDA-certified organic foods are grown and processed according to federal guidelines addressing, among many factors, soil quality, animal raising practices, pest and weed control, and use of additives. Organic producers rely on natural substances and physical, mechanical, or biologically based farming methods to the fullest extent possible. Produce can be called organic if it's certified to have grown on soil with no prohibited substances applied for three years before harvest. However, many crops are organically grown but do not carry the USDA-certified organic label because the certification process can be expensive for small farms.

USDA REGIONAL FOOD SYSTEMS INFRASTRUCTURE PROGRAM
A grant program operated by the USDA to fund selected states to offer subaward grants to farm businesses in obtaining equipment or developing their middle of the supply chain infrastructure. States may also use a limited portion of funds to develop and/or strengthen supply chain coordination and targeted market development services for local and regional products.

UTAH FARM TO FORK
The Utah-specific farm-to-school program that offers purchasing assistance, network organization, and a resource hub for producers and schools.

UTAH FOOD SECURITY GRANT
A grant program operated by the Utah Department of Agriculture and Food to offer grant awards to producers that cover expenses including processing equipment, coolers/freezers, contractor costs (plumbing, draining, electrical work), portion cutters, slaughter equipment, sorting equipment, bottling equipment, etc.

UTAH'S OWN
A membership program by the Utah Department of Agriculture and Food dedicated to promoting and supporting businesses within the state's agriculture and food sectors. Through the Utah's Own brand, it connects consumers with locally sourced products—ranging from farmers and ranchers to food producers and farmers markets—while also providing webinars, technical assistance, and business development support.

VALUE ADDED PROCESSING
Value-added processing is a means to utilize produce not used for fresh market sales and the surplus of product during the growing season. Adding value can be something as simple as sorting fruits and vegetables by size and selling through unique packaging to the complexity of processing salsa, jams, jellies, chutney, and meat animals.

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