



EXECUTIVE SUMMARY



Indiana stands at a pivotal moment in shaping the future of its food system. By better connecting Hoosier farmers, food businesses, institutions, chefs and consumers, Indiana can keep more food dollars in the state, improve farm profitability and expand access to local foods. The “Making Indiana Healthy Again Access to Local Foods Study,” initiated under Executive Order 25-58, finds Indiana has the agricultural base, consumer interest and programmatic foundation to increase Hoosier access to local foods. However, progress is constrained by gaps in processing, distribution, inconsistent regulatory interpretation, availability, and underinvestment in agribusiness support and resources. The study evaluates the full farm-to-table continuum — examining agricultural capacity, food-processing infrastructure, consumer behavior, economic impact and policy needs — to identify the most effective pathways for strengthening Indiana’s food system. Successfully executed, these efforts will further strengthen the central pillar of our state’s economy: agriculture.

Agriculture is already one of Indiana’s core economic drivers, generating over \$35 billion in economic impact and supporting more than 108,000 direct jobs, with total agricultural activity supporting about 200,070 jobs statewide. Yet only a fraction of the \$27.5 billion Hoosiers spend on

food each year is captured by Indiana farmers. Most consumers shop in supermarkets or large retailers, but many local producers lack the infrastructure and market channels needed to reach those buyers consistently and at scale.

This study found a strong interest from consumers to shop local. A statewide survey of Hoosier grocery decision-makers showed more than 90% are aware of local food channels, and nearly two-thirds say local sourcing matters to them. Even so, price, availability and convenience continue to limit consistent purchasing. Grocery decision-makers are the individuals responsible for making purchasing choices for their household’s groceries. This includes the person who selects where to shop, what food items to buy and how much to spend for the purposes of this survey and study.



Stakeholders across the state echoed findings and emphasized recurring priorities: greater processing and aggregation capacity, expanded storage and distribution infrastructure, clearer and more consistent regulatory guidance, better access to capital and business support services, stronger support system for beginning and transitioning farmers, and improved consumer awareness of Indiana-grown products.



Indiana is well positioned to act. The state has a strong and diverse agricultural base, including established poultry, dairy and livestock, along with specialty crop sectors. For the purposes of this study, specialty crops are defined as any cultivated or managed fruit, vegetable or tree-nut crops. Schools, universities, hospitals and restaurants show increasing interest in local procurement. These strengths provide a solid platform for coordinated statewide action.



Building on these strengths, this study recommends practical, tried-and-true strategic initiatives focused on removing barriers and expanding opportunities. A central priority is modernizing and aligning regulatory and food-safety systems so farmers and food businesses have a clear, predictable regulatory experience across counties. Strengthening market development and business support is equally important, including expanded technical assistance, streamlined business onboarding, greater promotion of Indiana-grown products, and stronger pathways that help producers connect with larger retail and wholesale buyers. The study also highlights the need for expanded agency capacity — particularly in inspection, technical assistance and grant coordination — to ensure the state keeps pace with the needs of a modern food and agricultural economy. Finally, long-term growth will depend on targeted investment in infrastructure, including food-processing facilities; cold storage; food hubs; distribution networks; and specialized training programs, such as butchery, produce safety and diversification of farms.

Overall, the study concludes that strengthening Indiana’s local food system — in short, “making local easier” — is both an agricultural and economic development opportunity. With the implementation of this study’s recommendations, Indiana can keep more food dollars in the state, improve access to fresh and local foods, expand market opportunities for farmers and food businesses, and build a more resilient food system for communities across Indiana.



