



SECTION I.  
**INTRODUCTION**



## **PURPOSE OF STUDY**

Indiana stands at a pivotal moment in shaping the future of its food system. Executive Order 25-58 was introduced to redefine how the state of Indiana supports our Indiana food and farming operations, ensuring that locally grown, raised and processed foods are more accessible to families across the state.

This executive order recognizes that Indiana’s agricultural heritage is one of its greatest assets and underscores the importance of building stronger ties between Hoosier farmers and families, creating pathways for fresh, locally grown food to reach every community across the state.

This study was undertaken to assess the current awareness, availability and accessibility of locally grown food in Indiana; identify the obstacles that prevent Hoosier farmers from reaching or tapping into new markets; and explore strategies that can expand and strengthen the local food economy statewide. By grounding this work in data, stakeholder input and economic analysis, this study provides a road map for achieving the goals of Executive Order 25-58.

# SCOPE OF RESEARCH

To fully understand Indiana's local food system, the study examines the entire farm-to-table continuum.

## AGRICULTURAL PRODUCTION, FOOD PROCESSING AND CONSUMER BEHAVIOR

This study evaluates Indiana's agricultural production capacity, from commodity crops and dairy, poultry and livestock to specialty crops and emerging markets, and how these products move through the state's food system. It assesses food-processing infrastructure, including meat processors, produce packing facilities and value-added operations, identifying gaps that limit market access. The study also explores consumer behavior, including awareness of local food options; household purchasing patterns; and participation in direct farm purchases, like farmers markets, on-farm stands and institutional procurement. Expanding market channels for food and farming businesses is the focus of this study; addressing food insecurity within the state was not in scope for this work.

## ECONOMIC IMPACTS AND POLICY CONSIDERATIONS

This study analyzes the economic implications of strengthening local food systems, including farm profitability, job creation, community economic multipliers, food affordability and supply chain resilience. It also evaluates policy considerations, such as licensing, inspection requirements, local procurement framework and opportunities to streamline regulations to support local producers.

## DEFINITION OF "LOCAL"

For the purposes of this study, "local" refers to food that is grown, raised, processed and/or packaged within the state of Indiana. This definition aligns with the intent of Executive Order 25-58 and the Department of Agriculture's (ISDA's) Indiana Grown program, emphasizing the importance of supporting in-state businesses.





## **“SETTING THE TABLE” – WHAT’S WORKING WELL IN INDIANA AGRICULTURE**

Indiana enters this moment of transformation with significant strengths already in place. The study findings reflect insights from virtual and in-person community listening sessions; one-on-one discussions with stakeholders, commodity groups, agribusinesses, educators and consumers; and many secondary sources of data.



## **A STRONG AND STEADY AGRICULTURAL FOUNDATION**

Indiana agriculture reflects a broad mix of production styles, scales and commodities. Family farms, multigenerational operations, emerging growers and diversified enterprises contribute to a system that is both thriving and grounded in practical knowledge. Producers continually refine how they grow, raise and manage their operations, adapting to changing conditions, new technologies and evolving community needs.

This foundation is supported by a culture of problem-solving, collaborative networking and learning that is visible across all regions. Whether through informal networks, relationships with universities, supporting agriculture partners or peer collaborations, Indiana farmers have long relied on shared experience to navigate challenges and identify new opportunities. This environment of producer-driven adaptation strengthens the agricultural base and positions Indiana well for future-focused initiatives.

## **CONSUMER CULTURE SHIFTS TOWARD LOCAL**

A statistically significant study conducted by the Indiana State Department of Agriculture, based on a survey of 488 Hoosier grocery decision-makers in early 2026, found that freshness is the strongest motivator for buying local (63%), followed by better taste (55%) and supporting the local economy (42%).

Hoosiers increasingly seek food that is seasonal, local and rooted in place. Regional listening sessions describe a steady mainstream of local purchasing in urban and rural communities alike, along with agritourism drivers, such as u-pick farms or farm stores, that draw visitors across county and state lines. Consumers are also signaling preference for restaurants that highlight local producers, reinforcing the role of identity, story and transparency in everyday food choices.

Despite these positive attitudes, 90% of Hoosiers report at least one barrier to buying local, with “higher prices” and “limited availability” each cited by about half (51%/50%). This gap between perception and reality underscores the importance of affordability measures in normalizing local food as an everyday choice.

## OUR INDUSTRIES



### CORN & SOY



### PORK



### BEEF



### DAIRY



### POULTRY & EGGS



### SPECIALTY CROPS

## AGRICULTURAL BACKBONE: “SETTING THE TABLE”

Indiana's agricultural landscape is anchored by robust corn and soybean production, which consistently positions the state among national leaders in yield, acreage and economic output. These commodity crops form the foundation of Indiana's farm economy, supporting thousands of jobs across production, processing, transportation, feed manufacturing and biofuel industries. Their scale and stability create a reliable agricultural backbone that helps sustain the broader food system.

### CORN AND SOY

While corn and soy may not be as visible to consumers as a carton of berries or a bunch of kale at a grocery store, they are essential to the infrastructure that makes local food possible. Indiana-grown corn and soybeans do more than feed livestock — they're also processed into starches, oils and other ingredients that support a wide range of value-added food products. In doing so, these crops contribute far more than first-order commodity value — they help sustain the availability of local meat, poultry, eggs, dairy and value-added goods. Together, Indiana's corn and soy industries serve as foundational pillars that complement and strengthen a diverse, community-connected, regionally rooted local food system.

### PORK

Indiana's pork industry serves as one of the state's most dynamic agricultural sectors, supported by strong grain production, efficient feed systems and long-standing livestock expertise. As one of the top pork-producing states in the nation, Indiana benefits from a tightly linked agricultural ecosystem in which corn and soy — major feed components — flow directly into high-value livestock production. This interconnected system generates substantial economic impact, supporting farmers, processors, veterinarians, transportation networks and rural communities.

The pork sector plays an important role in strengthening Indiana's local food system. Hogs fed Indiana-grown grains contribute to a wide range of local protein offerings, from small butcher shops and farm stores to restaurants and local, regional and national retailers that sell Indiana pork.



## BEEF

Indiana's beef industry is a steady and multifaceted contributor to the state's agricultural economy, grounded in a mix of family farms and larger commercial enterprises. Indiana benefits from a strong grain sector, enabling producers to raise and finish cattle using locally grown feed and helping maintain a relatively stable supply of beef within the state. Within the local food system, beef plays an especially visible and trusted role. Consumers consistently seek out local meat, and Indiana's beef producers contribute to that demand through farm stores; farmers markets; Community-Supported Agriculture (CSA), on-farm sales; and partnerships with butcher shops, retailers and restaurants. The presence of cattle across every region of the state ensures locally raised beef is accessible, familiar and woven into the identity of Indiana agriculture.

As consumer demand for Indiana-grown products continues to rise, the beef sector offers opportunities to further integrate commodity agriculture with local food pathways. Locally raised, finished, value-added products demonstrate how the state's established beef industry can diversify markets and enhance community connections.



## DAIRY

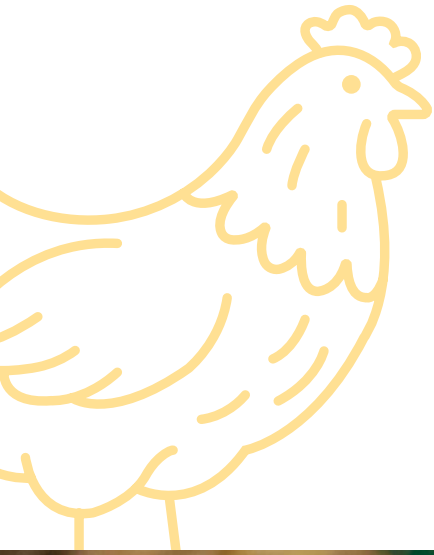
Indiana's dairy industry is a long-standing pillar of the state's agricultural economy, supported by a mix of family-run operations, multigenerational farms and modern dairy enterprises. Indiana's dairy producers benefit from the state's abundant corn and soybean resources, enabling efficient and reliable milk production. The dairy sector supports a wide network of jobs across milking operations, feed services, veterinary care, milk hauling and processing, keeping economic value circulating in rural communities.

Dairy plays a uniquely visible and trusted role in Indiana's local food landscape. Milk, cheese, butter, yogurt, and ice cream from Indiana dairy farms offer consumers familiar staples with a clear local identity. Many Indiana dairy farms also participate in agritourism through creamery storefronts, on-farm events and educational tours, which strengthens community connection and deepens consumer understanding of how local food is produced.

## POULTRY

Indiana's poultry and egg industry is a dynamic and nationally competitive agricultural sector, distinguished by both its scale and diversity. Indiana ranks among the top poultry states in the country — No. 1 in duck production, No. 3 in egg production and No. 4 in turkey production — reflecting a highly specialized and efficient system that plays a major role in meeting regional, national and international demand. This strength is underpinned again by Indiana's reliable supply of corn and soy for feed, as well as its developed network of processors, feed mills and distribution partners.

Within Indiana's local food system, poultry and eggs occupy a particularly important space. Eggs, chicken and turkey are everyday staples with strong consumer trust, and Indiana producers bring these products directly into communities. Indiana's poultry and egg sector — competitive at the national level and deeply rooted locally — provides essential protein staples and an accessible gateway into local food purchasing.





## SPECIALTY CROPS

Indiana's specialty-crop sectors — particularly tomatoes, pumpkins, mint and melons — add seasonal vibrancy and diversity to the state's agricultural landscape. Growers build on deep horticultural experience, pairing long-standing knowledge with region-specific growing practices. These crops also contribute to Indiana's national profile, with the state consistently ranking as a top producer of pumpkins, processing tomatoes, watermelons and mint, underscoring a strong and diverse horticultural base.

Specialty crops play a particularly visible role in Indiana's local food system. Seasonal fruit and vegetables move through farm stands, CSAs, farmers markets, retailers, universities, institutions and restaurants, creating fresh, recognizable connections between growers and communities. Many farms also integrate agritourism, including u-pick operations, educational opportunities and seasonal festivals, strengthening ties between Hoosiers and communities while extending economic opportunity.

Indiana's specialty crops are an essential component of the broader agricultural landscape. They bring financial diversity to farms; reinforce the identity and visibility of Indiana-grown foods; and provide fresh, seasonally distinctive products that anchor local markets and community food connections across the state.

## “SETTING THE TABLE”

Viewed together, the stories of Indiana's commodity, dairy, poultry, livestock and specialty-crop sectors demonstrate an agricultural state rich in capability, tradition and innovation. They highlight a food and farming landscape that is both broad and deep that excels at production, adapts through collaboration and expresses strong community commitment.

# A UNIFYING IDENTITY: INDIANA GROWN

Agriculture has long been one of the state's strengths, a foundation of the economy, a defining element of Indiana's identity and a livelihood passed down through generations. With more than 14½ million acres, Indiana remains a place where agriculture is both heritage and innovation, generating billions in economic activity and touching every community with a blend of tradition and modern opportunity.

Within this expansive agricultural landscape, the Indiana Grown program has become an impactful initiative. Created with a straightforward yet ambitious mission to help Hoosiers identify, purchase and champion products grown, raised, processed or packaged in Indiana, the program has since grown beyond its origins as a branding and awareness effort. Today, Indiana Grown functions as a statewide economic development engine, strengthening local supply chains, elevating producers, and ensuring that more of the value created by Indiana agriculture remains in Indiana communities.

Its impact is visible across every corner of the state's food system. Indiana Grown gives farmers, producers and food businesses a unified identity that consumers trust, a mark that signals authenticity, quality and local origin. Members consistently describe the program as providing "credibility," "visibility" and "a sense of professionalism" that would otherwise be hard to achieve for small businesses navigating crowded retail and wholesale markets. Survey responses repeatedly show that the Indiana Grown logo often sparks conversations that lead to new customers, sales opportunities and stronger community relationships.

Through its business support, branding, digital platforms and outreach, Indiana Grown has played a central role in shifting local food from a niche interest to a recognizable choice. It's clear, trusted identity provides a shared language for Indiana's local food movement, reinforcing trust, strengthening regional efforts, and helping producers be seen while helping consumers confidently find local products.





## **COLLABORATION IS AN INDIANA ADVANTAGE**

Collaboration is woven throughout Indiana's food system and remains a strong asset. Opportunities still exist, however, to more clearly define agency roles and create a more intentional partnership model. The role of local food systems emerges as a central theme in this study and provides a compelling organizing principle for future statewide efforts. Across Indiana, food councils, co-ops, food hubs, value-chain professionals and agencies coordinate efforts to bring growers together and connect them with wholesale and institutional buyers. Recognizing this landscape offers an important opportunity to clarify where state agencies are currently contributing, where gaps remain, and how the recommendations in this study can help Indiana strengthen the connective framework of its food system, ensuring Indiana agriculture is not only prioritized, but positioned as a core component of the state's economic strategy.

## **SCHOOLS LEANING IN**

K-12 schools across Indiana are increasingly ready to source locally when supply, cost and logistics allow. This growing interest reflects a broader shift toward strengthening Indiana's food system and creating a greater number of direct connections between producers and institutional buyers. State-led efforts through the Indiana Farm to School Network (facilitated by the departments of Education, Agriculture and Health) use an approach that engages local stakeholders and builds stronger pathways between early-childhood-education centers, K-12 schools and farms. As participation expands, state agencies remain committed to exploring additional strategies to support schools. The state aims to elevate successful models; expand peer-learning opportunities; and ensure every school has a clear, well-supported pathway. Looking ahead, there is also an opportunity to strengthen and scale Farm to School participation with specific recommendations as a part of this study.



These interconnected strengths form the backbone of Indiana’s agricultural identity and offer a solid foundation for building a more unified, accessible and future-ready statewide framework.

“Setting the Table” is more than a summary of what’s working — it is a reminder that Indiana’s path forward rests on strengths already in motion, ready to be scaled, connected and supported through proven recommendations, common sense policy and strategic investment. The ingredients for transformation are already present; Indiana’s next step is to bring them together into a unified, thriving and robust framework that serves every Hoosier.

Indiana’s agricultural sector stands at a pivotal moment, one defined by both its enduring strengths and its emerging opportunities. Across the state, farmers, food businesses, community partners and industry stakeholders contributed their voices through listening sessions, producer roundtables, partner convenings and public engagement efforts. Their insights shaped a set of recommendations designed to strengthen Indiana agriculture as a whole and ensure it remains resilient, competitive and deeply connected to the communities it serves.

A consistent message across all stakeholder engagement was the need for a more coordinated, comprehensive support system for food and farming businesses. By better aligning programs, technical assistance and market-access strategies across the agricultural

ecosystem, Indiana can create a seamless network of wraparound services that help businesses navigate regulatory funding, adopt new technologies and scale their operations. This integrated approach ensures producers receive timely guidance and consistent resources at every stage of growth.

Together, the following recommendations chart a path toward a more vibrant, robust and locally connected food and farm economy. By expanding market pathways, fostering entrepreneurship, providing wraparound support systems and removing barriers, Indiana can strengthen the infrastructure that links producers directly to Indiana communities. The result is a food system that ensures the benefits of Indiana agriculture — economic vitality, local pride, nourishing food and successful businesses — are shared broadly and felt at every table across the state.

As Indiana looks ahead, understanding the current landscape of agricultural programs, assets and opportunities is essential. The following overview of existing efforts provides context for recommendations, highlighting areas in which strategic investment and partnership can further expand Indiana’s agricultural potential. Grounded in community insight, informed by proven models and tailored to Indiana’s unique agricultural landscape, these recommendations outline a future in which Indiana agriculture continues to lead, innovate and grow.





