

Prince George's County Agriculture & Food Security Innovation Center Feasibility Study

Concept Model & Case Studies

Sept 15, 2026

Revenue Authority of Prince George's County

RFP No RA-AFSIC-10-2024



CONCEPT MODEL

Concept Model Identifies:

- The potential services and activities to be offered by the facility operator
 - Each of the component spaces that are needed to service process flow and function
 - Opportunities to overlay desired programs by the facility operator and/or partners
 - Where partnerships might benefit the facility and/or programming
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At this stage, a concept model is not attached to a specific site but includes the following:

- Identification of primary operating components including:
 - Space
 - Programs
 - Services
- Samples to illustrate how those elements may work together in a potential site
- Case Studies to identify comparable projects

CONCEPT ELEMENTS

Traditional Food Hub

- Aggregation
- Distribution
- Storage
- Food Processing
- CSA

Added Functions

- Kitchen (shared or individual)
- Demonstration space
- Classrooms / Training
- Farmers market & public event space
- Retail grocery
- Retail / production space for food businesses

Operator Roles

- Facility lead, manage space, leasing & tenant relationships
- Oversee key operations such as core food hub components and event space management

Partner Roles

- Workshops / Training and Business education
- Demonstrations / nutrition classes
- Retail / Farmers market
- Shared kitchen

MARKET ANALYSIS KEY FINDINGS

- Agriculture in Prince George's County is dominated by the presence of **smaller farms**, averaging 86 acres per farm with many under 10 acres.
 - **Land costs, labor costs, input costs and access to capital are noted as some of the largest hurdles** that growers face.
 - Many subjects highlighted **the need for cold storage and logistics infrastructure** such as coolers and refrigerated vehicles to maximize product shelf life.
 - The County's agriculture sector accounts for just 1% of the state's industry suggesting that an **AFSIC facility might need to support growers across the region**.
 - **Permitting and regulatory challenges** exist especially for multi-functional food businesses.
 - There are **many regional mission-driven organizations** focused on driving equitable and healthy food systems.
 - There is a desire for **improved local purchasing guidelines** and funding to subsidize initiatives.
- Small **producers may require additional education training**, support and succession planning programming.
 - Multiple subjects highlighted the need for **more food processing facilities including affordable commercial kitchen space** for entrepreneurs.
 - There is a desire for **regional aggregation and distribution** resources exempt from some GAP & FSMA compliance standards.
 - The survey registered interest in a food hub, but **questions remain about farmer ability to scale and provide consistent & reliable product**.
 - There is a noted consumer demand for more local and healthy food. Yet **pricing may be a barrier to consumer purchasing**.
 - After pricing, **demand for an online ordering platform was the second most important feature** noted by food businesses.
 - **Fresh fruit and vegetables along with meat and seafood are the products most in demand** from both wholesale and retail consumers.

FOOD HUB COMPONENT DEMAND & INTEREST

Aggregation & Distribution	Medium
Storage	High
Food Processing & Manufacturing	Medium
Business Incubation Support & Training	High
Retail Consumer Access	High
Food As Medicine	Medium
Food Access Programs	Medium
Nutrition & Cooking Programs	Medium
Organization offices and community space	Lower

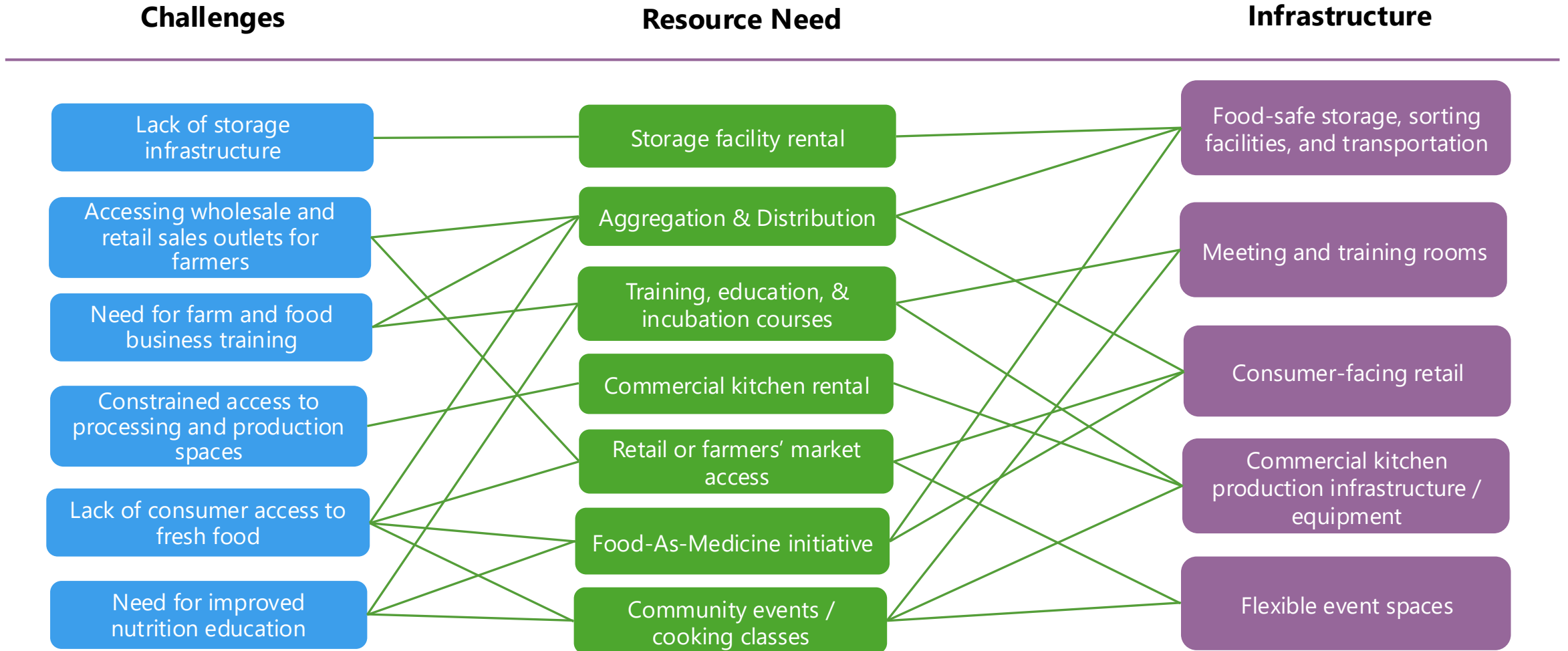
The strongest support for potential components of a Food Hub included:

- **Cold and dry storage** infrastructure.
- Business development and **training programming**
- **Retail sales opportunities** for businesses and for consumer access
- **Improved aggregation & distribution** services to support small farmers

Moderate support was registered to support:

- Food processing, manufacturing & **commercial kitchen infrastructure** given existing capacity constraints in the region
- **Nutrition and cooking** programs
- **Food access and Food as Medicine** initiatives

KEY CHALLENGES & PROGRAM NEEDS



CONCEPT 1

Traditional food hub model focused on small farmers support with aggregation, distribution and business training programs. This model would also consider including a retail food component.

Required space est:
5,000-12,000 sq ft

Key Activity	Programs & Services	Audience	Size & Scale
Farm aggregation & distribution	• Develop farm & food producer partnerships • Facilitate aggregation of food to hub • Storage and redistribution of food • Manage ordering, invoicing, & payment processing • Food delivery to businesses, consumers, and food access organizations	• Small businesses: < \$250,000 ARR • Scale to distribute beyond D2C but existing difficulty entering wholesale supply chain • Harvesting, distributing, selling grown products	• 3,000-8,000 sq ft Includes: • Loading docks • Receiving • Storage • Packing / Logistics
Workforce Training, & Community Events	• "Accelerator" small business workshop series targeting farmers and food makers • One off classes in partnership with institution on specific business tools • Networking events • Cooking / Nutrition classes	• Food businesses incl: • Farmers • Food makers • Foodservice operators • Community w/ interest in business or nutrition	• 2 ea training / meeting rooms: 300 sq ft each • 1 ea event space: 2,000 sq ft
Retail Food	• Weekly / bi-weekly farmers market • Farm stand featuring aggregated produce and CPG products featured in the distribution program • Full retail operation housed within the Food Hub	• End consumers • Farmers and Food makers as suppliers	Approx 3,000 - 5,000 sq ft

CONCEPT 2

A second concept incorporates key elements of the first concepts and includes shared kitchen infrastructure with programming to support food-as-medicine initiatives.

Additional programming could leverage existing infrastructure and resources such as storage & transportation

Required space est:
12,000 – 17,000+ sq feet

Key Activity	Programs & Services	Audience	Size & Scale
Aggregation & distro	• Develop farm & producer partnerships • Facilitate aggregation of food to hub • Storage and redistribution of food • Manage ordering, invoicing, & payment processing • B2B & D2C delivery	• Small businesses: < \$250,000 ARR • Scaling beyond D2C but not in existing wholesale supply chain • Harvesting, distributing, selling grown products	• 3,000-8,000 sq ft Includes: • Loading docks • Receiving • Storage • Packing / Logistics
Workforce Training, & Events	• “Accelerator” small business workshop series targeting farmers and food makers • Classes in partnership with institution on specific business tools • Networking events • Cooking / Nutrition classes	• Food businesses incl: • Farmers • Food makers • Foodservice operators • Community w/ interest in business or nutrition	• 2 ea training / meeting rooms: 300 sq ft each • 1 ea event space: 2,000 sq ft
Shared Kitchen	• Rentable ‘pods’ – up to 8 stations • Dry, cold and freezer storage • Scullery with waste dumping • Dry packaging area	• Food makers • Foodservice companies (incl. Catering) • Farmers interested in value added products	Approx. 3,000– 5,000 sq ft
Retail Food	• Weekly / bi-weekly farmers market • Farm stand featuring aggregated produce and CPG products featured in the distribution program • Full retail operation housed within the Food Hub	• End consumers • Farmers and Food makers as suppliers	Approx 3,000 - 5,000 sq ft
Food As Medicine	• Nutrition counseling • Targeted food assistance • Mobile food delivery/access	• Nutritionists • End consumers, populations in demand for low-cost nutritionally dense produce	• Food storage • Classrooms / training facilities 1,000 – 2,000 sq ft

CONCEPT 3

A third concept incorporates explores a decentralized or hub-and-spoke model with a centralized facility to host programs and trainings along with three food storage sites across the county to improve storage, extend shelf life, and support distribution initiatives.

This model would require increased staffing, management and coordination across the multiple sites.

Required space est:
16,000 – 20,000 sq feet
(10,000-12,000+ sq feet hub facility
+ 3 facilities that are approximately
2,500 feet each)

Key Activity	Programs & Services	Audience	Size & Scale
Storage Facilities	• Operation, maintenance and coordination of up to three (3) storage facilities with an avg sq ft of 2,000 each. • To include dry, cold, and frozen storage.	• Farmers	• 2,000 - 3,000 sq ft ea • Loading docks • Receiving • Storage • Packing / Logistics
Aggregation & distro	• Develop farm & producer partnerships • Facilitate aggregation of food to hub • Storage and redistribution of food • Manage ordering, invoicing, & payment processing • B2B & D2C delivery	• Small businesses: < \$250,000 ARR • Scaling beyond D2C but not in existing wholesale supply chain • Harvesting, distributing, selling grown products	• 3,000 sq ft - Includes: • Loading docks • Receiving • Storage • Packing / Logistics
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Retail Food	• Weekly / bi-weekly farmers market • Farm stand featuring aggregated produce and CPG products featured in the distribution program • Full retail operation housed within the Food Hub	• End consumers • Farmers and Food makers as suppliers	Approx 3,000 sq ft
Food As Medicine	• Nutrition counseling • Targeted food assistance • Mobile food delivery/access	• Nutritionists • End consumers, populations in demand for low-cost nutritionally dense produce	• Food storage • Classrooms / training facilities 1,000 – 2,000 sq ft

Information Goal

Provide tangible examples of realized projects and facilities which incorporate similar elements to the recommended activities for the AFSIC

Case Study Summary

Hybrid Service Models

Every hub blends *wholesale/institutional aggregation* with *storage, retail, and direct-to-consumer programs* (CSAs, farmers markets, or retail). The diversification stabilizes revenue streams and increases community visibility.

Mission-Driven Structures

All operate as hybrid management, nonprofits, or social enterprises reinvesting profits into local farms, workforce training, and food access, allowing them to secure grants, public funding, and impact investments that private distributors cannot.

Infrastructure Investment

Purpose-built facilities (ranging from multi-site to 125,000 sq ft) serve as multifunctional community anchors combining cold storage, processing, and retail or kitchen space to co-locate services and optimize logistics.

Institutional Market Partnerships

Long-term relationships with hospitals, schools, and universities create predictable demand and enable scaling while advancing institutional procurement of local food.

Regional Collaboration

Networks and coalitions such as multi-hub systems or statewide food alliances amplify sourcing capacity, market access, and policy influence, critical for resilience and regional food sovereignty.

Community and Education

Cooking classes, workforce programs, business training, and nutrition access initiatives (like SNAP incentives) transform food hubs into community education and empowerment centers rather than mere distributors.

CASE STUDIES

CASE STUDY: VALLEY ROOTS

Located in the San Luis Valley and Chaffee County, Colorado, Valley Roots Food Hub is the main distribution hub of the CO food hub network (3 hubs in CO & NM)

Size: 5,000 sq ft facility

Cost to Build: Approx. \$7-10M

Organization Size / Budget: Part of the San Luis Valley Food Coalition with \$1.8M in food sales from local producers in 2024

Services:

- Aggregation & distribution for wholesale & institutional markets.
- DTC CSA with multiple pickup & delivery offerings
- Offers storage, packaging, and cold chain logistics
- Shared kitchen rental
- Catering & Value-added production

Impact:

- Expands access to local produce and supports sustainable farming practices
- Creates market linkages across regions through partnerships

Lessons Learned:

- A diversified service model that includes direct-to-consumer and wholesale is essential for long-term sustainability
- Collaborating with regional hubs increases impact, reach, and product accessibility



CASE STUDY: PUGET SOUND FOOD HUB

Puget Sound Food Hub is a farmer-owned cooperative operating in the Puget Sound region of WA.

Size: 14,000 sq ft facility

Cost to Build: Approx. \$7-10M

Organization Size / Budget: PSFHC is recognized as a cooperative marketing association with a board of directors. Members pay a for a holding stock as well as dues.

Services:

- Rented Office Space
- Dry storage, a 4,000 sq ft cooler, 360 sq ft freezer,
- 3 trucks, a forklift, and electric pallet jacks
- Aggregation facility
- Online Platform for buyers and members
- Coordinated Logistics, Aggregation & shared distribution for wholesale, institutional markets, & D2C
- Education and Training

Impact:

- Expands access to local produce and supports sustainable farming practices
- Creates market linkages across regions through sales relationships

Lessons Learned:

- PSFHC started as a wholesale farmers market as a means of opening new market opportunities for area producers. This helped develop relationships with anchor farms so that the hub could establish competitive price points and determine how to provide sufficient volumes for institutional buyers.
- An experienced sales manager who could devote time to seeking out and developing relationships with new buyers are essential for success. Increasing the number of value-added vendors selling through the hub allows them to conduct year-round business.



CASE STUDY: FARM FRESH RHODE ISLAND

Providence, RI based food hub and retail marketplace that strengthens the regional food system by connecting farmers and food producers with regional wholesale distribution, farmers markets, retail management, nutrition, and training programs.

Size: 60,000 sq ft facility, completed 2020

Organization size / budget: Non-Profit 40+ employees | \$7.3M budget, \$8.7M revenue (\$2.9M program services)

Cost to Build: approx. \$20M

Build Funding Sources: State & City Grants, Private Grants, Loans, NMTC,

Features and services include:

- Aggregation and distribution for wholesale and institutional markets
- Farmers market management incl. on-site winter market
- Consumer ordering and delivery
- Food access and nutrition programs (bonus bucks for SNAP/EBT consumers)
- Leasable retail spaces targeting food businesses to support both production and consumer sales.
- Youth workforce training through value-added processing & production
- Cold/Freezer Storage and Gleaning through incorporation of Hope's Harvest prog

Impact:

- Market Mobile program distributed \$38M+ food from 2009-2024
- Leading aggregator in New England

Lessons Learned:

- 20+ years of operations helped build network & capacity to scale
- Inclusion of leased retail offsets operational costs



CASE STUDY: THE REDD

The Redd on Salmon Street is a regional food hub working to advance an “equitable, restorative, and delicious” regional food system

Location: Portland, OR

Size: 76,000 sq. ft. campus with two buildings

Cost to Build: \$25 million

Organization Size / Budget: Nonprofit, project of EcoTrust, a Portland-based non-profit organization.

Redd West- Working Hub that provides warehousing, cold storage, distribution, logistics, processing, and business development support. Core community members include a plant-based commercial kitchen, a purveyor of pasture-based and wild meat and seafood, partners in growing the next generation of food system leaders, and bike-based distribution, warehousing, and cold-storage services.

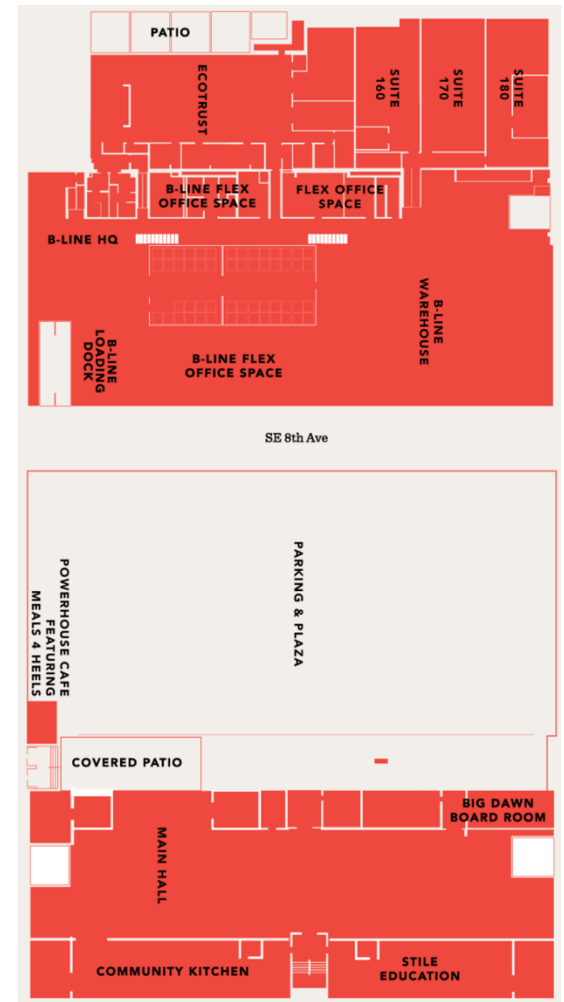
Redd East- Venue/event space including a board room, commercial kitchen, main hall, and outdoor plaza. Space is used for private rentals and community events (including farmer’s markets).

Impact:

- Expands access to local produce and supports sustainable farming practices
- Creates market linkages across regions through partnerships

Lessons Learned:

- By inspiring change and supporting a regenerative food economy, the Redd supports the growth of a robust food system. The Redd hosts both critical back-of-house support for socially conscious food businesses, and a world-class event center focused on spreading the ideas of the good food movement.



CASE STUDY: EASTERN MARKET

The Eastern Market Complex is anchored by a series of public market buildings featuring significant infrastructure to support food-related businesses, retail and housing units.

Location: Eastern Market, Detroit, MI

Size: 125,000 sq ft facility

Cost to Build: Approx. \$7-10M

Organization Size / Budget: Nonprofit with \$7.1 million operating budget

Services:

- Wholesale Farm Market and Retail Space
- Regional Crop Processing Center with IQF, canning, and lightly processed goods.
- Office space,
- Demo kitchen
- Rentable indoor flex space
- Cold Storage Warehouse with docking

Impact:

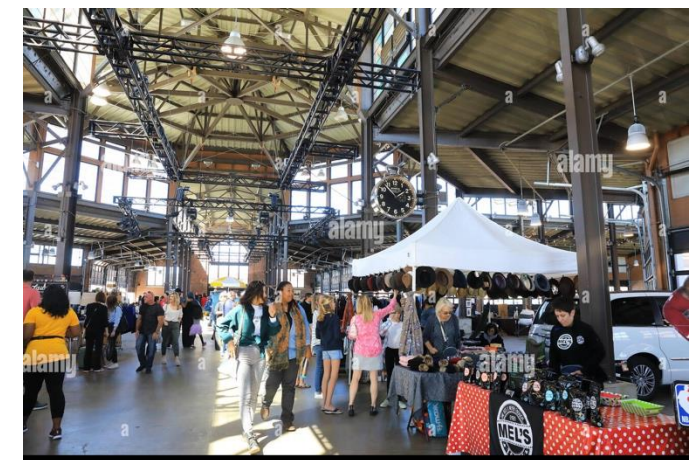
2 million people served (40,000 visitors daily during peak season),

- \$360 million of wholesale food is sold
- \$418 million of meat
- 1,300 are permanently employed by EM food businesses.

Lessons Learned:

The support services offered (aggregation, distribution assistance, technical assistance, cold storage, funding supports) are attractive incentives for farmers to participate in the market system.

The market acts as a keystone project for a wider food district revitalization that works with the market to draw customers and tourists to the community for shopping, retail, grocery, and dining.



CASE STUDY SUMMARY

	Eastern Market	Farm Fresh	The Redd	Puget Sound Food Hub Co-op	Valley Roots
Location	Michigan	Rhode Island	Oregon	Washington	Colorado
Model Type	Market Campus Complex	Food hub with retail spaces, offices, farmers market & nutrition assistance programming	Food hub with retail spaces, offices, flexible event space	Warehouse, distribution program, and network anchor 'hub'	Warehouse, distribution program, and network anchor 'hub'
Description	Historic Marketplace with Retail and Wholesale, as well as light processing, food and farm business support, shared kitchen, office space, and multifunctional space.	60,000 sq ft new construction (2020) HQ housing Market Mobile aggregation, Hopes Harvest gleaning, farmers market, & 10+ retail storefronts.	Non-profit led 2-building hub campus designed to support the region and help scale a robust food economy across the Pacific Northwest run by Tenant Partners	Cooperatively owned by farmers in WA. Food aggregation, distribution, storage, office space, CSA, education resources.	Distribution "Hub" with a focus on wholesale distribution. Main distribution arm of the Colorado food hub network (3 hubs in Co & NM)
Services	Aggregation, distribution assistance, technical assistance, funding supports.	Aggregation, Distribution, Farmers market, Gleaning, Youth culinary training, value-added processing, food business retail	Entrepreneur support hub with warehousing, storage, distribution, logistics, processing, and business development support. Event Space.	Online Platform for buyers and members. Coordinated Logistics, Aggregation & Shared distribution for wholesale & institutional markets. Education and Training. D2C CSA Subscription	Wholesale and Retail Distribution, CSA, Commissary Kitchen, & Value-added production
Population	2 million people shop and buy \$360 million of wholesale food is sold \$418 million of meat is sold 1,300 are permanently employed	Food Businesses, Retail consumers, foodservice, institutions	Food enterprises, chefs, foodservice directors, farmers, ranchers and fishermen. Retail Consumers.	Over 70 local, family-scale member farms and producers. Retail Consumers, Institutional Buyers.	Over 100 producers, Retail Consumers, Wholesale accounts, Institutional Buyers.
Scale	\$7.1 million operating budget	\$8.7M revenue w/ \$2.9M in program service revenue (2023)	Ecotrust ~\$10 million annual operating budget	Estimated at ~\$13.5 million in revenue	\$1.8M in food sales in 2024

BUILD CONSIDERATIONS

A centralized facility with the above activities may require the following:

- ADA accessibility throughout the facility
- Elevated loading docks for delivery trucks
- Ramps and wide entry ways to accommodate large deliveries including pallets
- Multiple access points for public, staff, and loading/delivery needs
- Single story for key operations. Additional floors or basement space may be suitable for offices and/or training rooms.
- Electrical service to power cooling and food processing equipment
- Sufficient parking for employees, partners, & the public
- Water and drainage infrastructure for cleaning and processing of vegetables
- Ventilation infrastructure to support entrepreneurial kitchen services

Further planning & research required:

- No location and/or facility has yet to be identified
- Additional code & permitting research needed to confirm if all functionalities are allowed to exist in one location and which parcels are permitted or may be given a variance for development
- A general project scale and/or budget has not yet been considered to constrain the project's goals or scope.

OPERATOR CONSIDERATIONS

- While no operator or consortium of operators identified, multiple regional organizations have programs/operations that touch upon key activities of the proposed food hub
- Potential for a group of operators each managing a key component of the facility under one umbrella organization or developer
- A multi-unit / de-centralized project may ease access by users and the allow for increased partnership of organizations to avoid location & infrastructure conflicts. However, it may also require duplicative components, increase operating and maintenance costs, and present complications to coordinating across organizations & functions.

NEXT STEPS

Site Visit / Evaluation – Sept 28 & 29, 2026

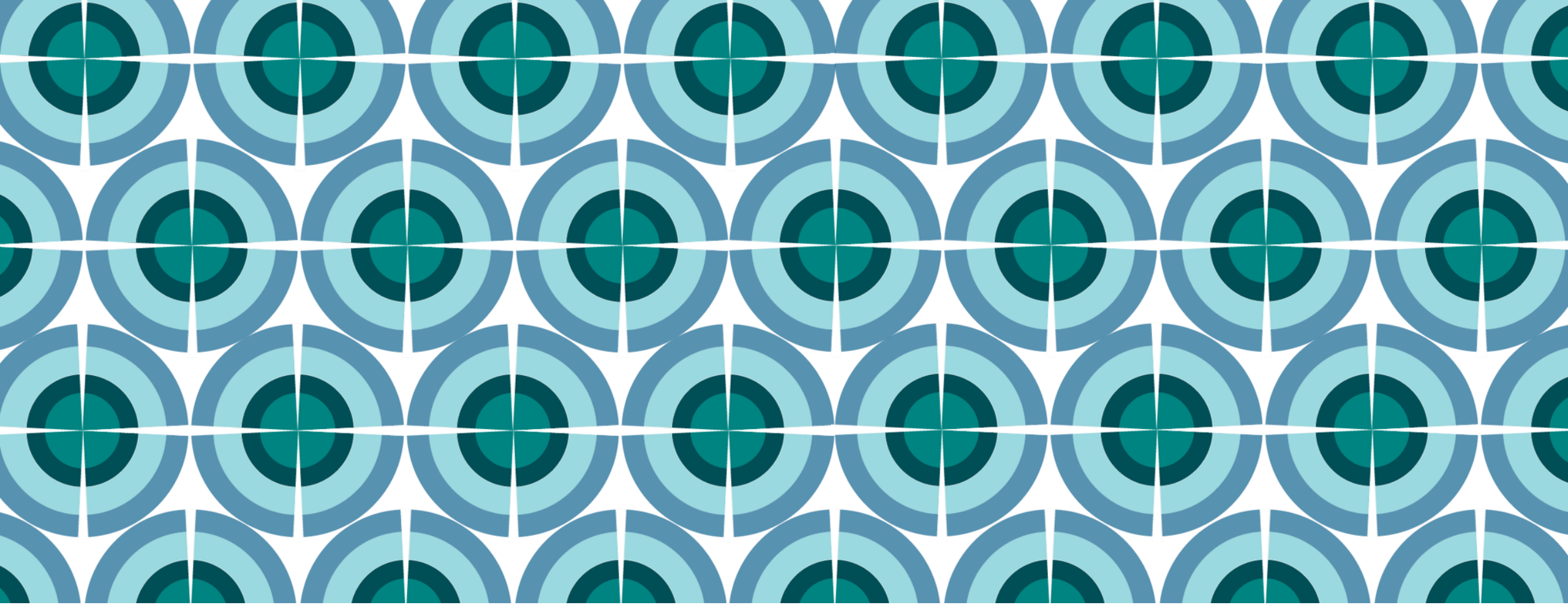
- Identify & tour potential AFSIC locations/sites
 - Advisory support to recommend properties & facilities to evaluate
 - Share via email by Sept 18
 - Visit project/program partners
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Draft Operation Model - Oct 2026

Community Design Charrette – Nov 2026

Operating and Financial Model Refinement – Jan 2027

Final Report – Feb 2027



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WHAT IS A FOOD HUB

- A **food hub** is a business or organization (*a for-profit or not-for-profit*) that supports the aggregation, sales, distribution, marketing, and/or logistics of local produce and products.
- The purpose of a food hub is to support the development/growth of local agriculture by creating new opportunities for **local farmers and producers** to **sell their products**.
- **Food hubs connect local/regional farms and small businesses to larger buyers** like grocery stores, restaurants, and institutions.

Potential components of a Food Hub

- **Aggregation & storage of food** (produce, meat, or value-added products) from local growers & producers.
- **Distribution** and logistics support to commercial vendors (grocery, institutions, & retail foodservice)
- **Long-term production & processing** for specific food businesses across the value chain
- Consumer retail footprint such as a **farmer's market or permanent storefront**.
- **Shared & flexible kitchen space** to support early-stage value added or foodservice businesses.
- **Community & office space** targeting food system organizations.
- **Workforce development programs** & training for food and agriculture.

ACTIVITY, PROGRAM, & SPACE NEEDS

	Storage & Logistics	Production Infrastructure	Retail	Other spaces
Activities	• Aggregation • Storage • Order processing • Loading / Delivery / Transportation	• Food cleaning / processing • Shared kitchen • Individual production kitchen • Cooking demos • Special events	• Special event retail • Grocery store • Independent food-related production & retail	• Classrooms & training spaces • Flexible event space • Offices for operator & partner organizations
Programs	• Wholesale Distribution • CSA • Gleaning • Food access / donation • Food as medicine	• Hourly kitchen rental • Long-term kitchen lease • Nutrition education • Cooking events	• Farmers markets • Food access • Specialized space lease & management	• Business workshops • Food as medicine / nutrition education • Community Engagement • Lease, management, & operations