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FFEN Strategic Food Sourcing: Fall 2025 Consultation Themes Report

Strategic Food Sourcing: Service Overview

FFEN's Strategic Food Sourcing Service supports food shelves across Minnesota, western Wisconsin and eastern North Dakota to be data-informed, shopper-centric, and optimized to meet the needs of their community into the future. Through free biannual reports, FFEN analyzes key metrics in two categories: Meeting Shopper Needs (examining the product mix of fresh produce, protein, and dairy) and Stewarding Donor Dollars (evaluating spending by food category, cost per individual served, and budget effectiveness). Participating sites receive a customized Food Sourcing Analysis (FSA) Report twice annually, consolidating their data across 10 food categories, paired with a 60-minute tailored consultation.These sessions review data with food shelf leaders, discuss sourcing options, identify opportunities to stretch dollars further, and set practical goals. FFEN tracks changes over time to help sites adjust programs based on shifting community demand and food availability.

Fall 2025 Strategic Food Sourcing Round: Data Insights

The Fall 2025 Strategic Food Sourcing round captures food sourcing and service statistic data from January to June 2025. This analysis covers 184 food shelf sites across Minnesota, western Wisconsin, and eastern North Dakota during a period marked by:

- Increased uncertainty in federal funding for food programs
- Heightened worry in certain communities about accessing services
- Minnesota food shelf visits continuing to outpace resources

Insights from this data set were shared with food shelf and sector leaders via a live webinar on September 15th, 2025. The full webinar recording and slides are available here. Key findings for the full data set during this timeframe include:

- **Most Important Foods:** Median percentage increased with less variability across programs, showing food shelves prioritized fresh produce, protein, and dairy despite challenges
- **Cost Management:** Cost per individual slightly decreased overall
- **Service Levels:** Pounds distributed per individual continued a slow downward trend since 2022
- **TEFAP Access:** TEFAP pounds per individual declined as visits outpaced available inventory

Participating food shelves also responded to questions related to their food shelf service with a full report on program characteristics here. Food sourcing data was then further analyzed by multiple size and program peer groups, lifting up the following insights:

- **By Service Size:** Larger programs (476+ households/month) achieved greater efficiency with lower costs per visit while maintaining higher percentages of Most Important Foods
- **By Visit Frequency:** Sites offering monthly visits showed the widest variability in sourcing patterns
- **By Budget Status:** Food shelves with approved budgets demonstrated 10 percentage points higher median rates of Most Important Foods and a smaller range for cost per individual

Fall 2025 Consultation Round: Overview

Strategic Food Sourcing Consultations for the Fall 2025 round occurred from September to October 2025 and included 100 individual sessions across 135 unique food shelf sites. It is important to note that while many sessions occurred during the 2025 federal government shutdown, conversations in later October took on a more urgent tone with the potential for delayed SNAP benefits for November.

Consultation sessions with FFEN staff are 60 minutes long and provide a deeper view of site data as a way of identifying sourcing strengths, opportunities for improvement, and proactively identifying strategies based on the current environment of demand and food sourcing. The consultations provided qualitative insights alongside quantitative data, capturing themes from conversations that offer a unique "pulse check" on the state of local food shelves during a period of significant uncertainty.

Fall 2025: Food Shelf Profile

The 100 organizations (135 total sites) meeting with FFEN for consultations was a sub-set of the full list of participating food shelf sites. This group included 26% new to FFEN's Strategic Food Sourcing process. Most operated with full shopper choice models (83%), were open multiple days per week (77%), and maintained annual food budgets (81%). Visit frequency ranged from monthly (45%) to as-often-as-needed access (17%), with service sizes spanning from small sites serving 1-60 households monthly to extra-large sites serving 476+ households monthly.

Fall 2025: Consistent Question

At the beginning of each consultation, FFEN staff asked a consistent question that served a dual purpose: providing a sector-wide snapshot of priorities and allowing FFEN to tailor

each session to the food shelf's unique needs. This round's "Consistent Question" asked food shelf leaders to identify their top priority from three options: (1) Increasing Most Important Foods (produce, protein, dairy), (2) Meeting the Demand for Food, or (3) Reducing Costs.

Results Across Consultations with 100 Organizations:

- **49% prioritized Meeting the Demand for Food** – reflecting increased demand food shelves have experienced over recent years. As one leader shared, "Probably my biggest concern is meeting the demand for food... we keep seeing our numbers grow and grow."
- **32% prioritized Increasing Most Important Foods** – with some focusing on maintaining their already strong percentage of produce, protein, and dairy.
- **19% prioritized Reducing Costs** – often viewed as a strategy to achieve long-term sustainability and meet increasing demand. One food shelf leader explained, "Reducing costs would have to be the priority because we have to be sustainable for the long run."

While food shelf leaders initially stated all three were important, the exercise created internal alignment for multi-staff teams and revealed the sector's heightened concern about capacity during a period of uncertainty.

Fall 2025: Spending by Food Category

A key component of the Food Sourcing Analysis (FSA) Report is a dashboard showing the amount and percentage of total spend per category, along with the three most expensive items per category. This analysis revealed that food shelves are prioritizing spending on protein—one of the most important categories for shoppers—while dairy and produce spending often remains lower due to state and food bank subsidies.

Highest Spending Food Category:

- **Protein was the #1 spend for 47% of organizations**—reflecting prioritization of this Most Important Food and that this broad category can also be costly to source
- **Baking and Cooking was the #1 spend for 35% of organizations,** highlighting the importance and cost of several staple items, such as flours and oils
- **Variation for the final 18% of organizations in terms of top spend**, including Fruit & Vegetables, Grains, and Meals and Sides

While food shelves are increasingly strategic about spending by category, there continues to be room for improvement—especially regarding second and third highest spends. Several food shelves are investing heavily in meals and sides and grains, categories that are ideal for food drives or donations because they're non-perishable. As one leader noted, "I don't think we realized how much we were spending on that until we saw that number."

Fall 2025: Food Shelf Strengths

Throughout consultations with food shelf organizations, FFEN staff noted, both through data and conversation, where food shelves were doing well. Despite an increasingly challenging food sourcing environment, several strengths were identified.

Prioritizing Most Important Foods

Food shelf leaders demonstrated strong awareness in consultations of the most important food categories (fresh produce, protein, and dairy) for shoppers. Most sites met or exceeded the goal of providing at least 50% of their food in these categories. As one leader noted, "We're working so hard to meet the needs of our shoppers with what we have. Keeping our most important foods above 50% is a realistic and solid goal."

To maintain this priority, food shelves shared strategic approaches they had implemented or were considering:

- Rotating high-cost staples (flour, sugar, oil) rather than offering all items every visit
- Shifting shelf stable purchasing towards targeted food drives with one food shelf mentioning: "We started a monthly newsletter with a 'donation of the month' and have actually gotten the things we requested."
- Focusing on depth in “Most Important Foods” categories rather than excessive variety across all categories

Expanded Food Vendors and Sources

While food bank sourcing remains the foundation for food shelf operations, more sites reported movement towards adopting multi-pronged sourcing strategies. Many food shelf leaders are increasingly purchasing from wholesalers and local vendors to ensure regular access to fresh foods between food bank deliveries or when food bank availability is limited. However, these additional purchases increased costs for food shelves adopting this strategy.

Data-Informed Decision Making

Food shelves reported increased use of metrics to guide budgeting and strategic decisions. Leaders frequently referenced cost per individual served in organizational and budget planning conversations and valued having concrete data to share with donors. One leader remarked, “I’m heading into my budget season. This is super helpful data going into it. It’s very hard to plan ahead. Trying to figure out what that upcoming budget looks like is difficult. This kind of data is super helpful in making the case.”

Enhancing Accessibility and Welcome

Several food shelves shared efforts to proactively improve service delivery to address increased demand while maintaining positive shopping experiences:

- Expanding to more accessible hours (evenings and weekends)
- Implementing online scheduling or ordering platforms

- Increasing physical space for Most Important Foods
- Emphasizing welcoming environments for new and returning shoppers

As one leader shared, "We made some changes in our shopping area to increase what's available for families after noticing the pounds per individual were lower than where we'd like them to be." Even food shelves facing tight budgets and tough sourcing choices were interested in strategies to increase welcome and hospitality when it was necessary to have limits on high-value or expensive items.

Fall 2025: Food Shelf Challenges

Across consultations, the majority of food shelf leaders reported facing difficult decisions as rising demand collides with a more constrained food sourcing environment. While some challenges are systemic across the network, others are region- or community-specific.

TEFAP Availability and Distribution

While TEFAP pounds have returned to pre-pandemic levels, dramatic growth in food shelf visits means significantly fewer pounds per eligible individual. This gap has intensified frustration with distribution systems and raised questions:

- Many current leaders have only experienced elevated TEFAP volumes from temporary streams (trade mitigation, CCC funding) and built programming assumptions around these levels
- The "first come, first served" ordering system now feels like it pits communities against one another as competition for food intensifies and requires more time resources to access

Tension Between Increased Demand and Limited Resources

Food shelf leaders are grappling with how to equitably serve growing numbers without creating a sense of scarcity for shoppers. This tension between providing more abundant food offerings and ensuring everyone receives something forces difficult trade-offs:

- Some sites can stock more food, but many lack the space or funds to do so
- Many provide less to each individual to "get everyone something"
- Leaders are becoming more transparent with shoppers about these decisions, though explaining the rationale remains challenging
- Local food rescue resources can reduce this pressure, but are not consistently available across all communities.

Funding Sustainability

Many food shelf leaders shared frustrations with short-term funding paired with extensive reporting requirements, creating workload challenges and planning constraints:

- Extensive reporting consumes valuable staff time
- Food shelves cannot accurately plan more than a year ahead

Staff and Volunteer Capacity
Food shelf leaders noted that increased demand was also putting additional stress on limited staff and volunteer capacity, creating both immediate operational challenges and longer-term sustainability questions:

- Physical demands of food shelf work raise concerns for aging staff and volunteers
- Questions about what will happen to the food shelf as the workforce ages
- Recruitment and retention challenges compound capacity constraints

Delivery Frequency and Perishable Access
Food shelves with a more limited delivery frequency from regional food banks often face challenges for fresh food access. Many food shelf leaders navigating monthly deliveries reported less perishable food access from food banks and were off-setting with local purchasing, inevitably increasing costs for the food shelf. In certain instances, limited food shelf storage space and service hours in conflict with delivery timing exacerbated the sourcing situation.

- Misalignment between delivery schedules and hours of operation compounds challenges (e.g., receiving monthly delivery 1-2 weeks before next open day)
- While some food shelves face limited delivery options; others struggle with internal capacity to handle additional deliveries

Fall 2025: Food Shelf Action Steps

During consultation sessions, food shelf leaders worked with FFEN staff to identify actions to meet shopper needs while stewarding donor dollars. Conversations included timelines for implementing these actions and the resources or support leaders would need to complete the work. Following the sessions, leaders received documentation outlining their agreed-upon action steps. Across these discussions, FFEN staff heard several recurring themes as leaders described their future plans.

Protect and increase Most Important Foods: Prioritize protein, dairy, eggs, and produce; maintain 50+ of pounds in these categories through through maximizing food bank resources and exploring local purchases as needed

- Reallocate funds from lower-priority items
- Increase shelving and floor space in the food shelf towards fresh, particularly produce

Use data to stretch dollars further: Apply cost-control strategies, maximize TEFAP and food rescue when possible, improve tracking of local purchases and cost per pound

- Use cost-control strategies (limits, rotating staples, price comparisons)
- Regularly review budget and vendor pricing
- Improve tracking of local purchases, donations, and food rescue

Leverage partnerships and targeted sourcing: Strengthen food bank and retail partnerships; use targeted drives to offset high-cost foods

- Maintain and expand food bank, rescue, and retail partnerships
- Use targeted drives to free funds for priority foods

Raise funds through clearer storytelling: Use report metrics in fundraising, grants, and donor communications to highlight cost efficiency and impact

- Highlight the “Most Important Foods” percent to showcase the importance of fresh foods and prioritizing what shoppers want most
- Leverage report data and visuals to engage donors and funders
- Demonstrate cost efficiency and stewardship in funding requests

Share widely to align and build support: Distribute report to boards, staff, volunteers, donors, and partners to inform budgeting and demonstrate impact

- Share with boards for budgeting and strategic decisions
- Align staff and volunteers on sourcing priorities
- Use metrics in fundraising appeals and community presentations

Fall 2025: FFEN Action Steps

In a time of ongoing strain on food and funding resources, FFEN is committed to providing targeted support and resources to help food shelf leaders maintain sustainability, think strategically about sourcing decisions, and manage rising demand.

Strategic Sourcing & Budgeting Support

FFEN has developed and will continue to expand tools to help food shelves prioritize Most Important Foods and make data-informed purchasing decisions:

- Released food sourcing prioritization tools, wholesaler option guides, and targeted food drive resources
- Developed simple budgeting tools to help leaders implement strategic budgets—as one leader shared, "The budget allowed me to buy things I wouldn't have before. It's okay to spend money. For me, it was more freeing than restricting"

Community Engagement Messaging

Food shelf leaders increasingly face time-consuming responses to offers of help and support as awareness of need grows. FFEN is developing:

- Messaging templates to help leaders respond with gratitude while clearly communicating what support is most needed
- Resources to help food shelves effectively communicate the value of cash donations for flexibility and high-value foods
- An Executive Summary of the Food Sourcing Analysis (FSA) Report metrics for easier sharing with organization leadership and community

Peer Learning & Problem-Solving
Throughout consultations, food shelf leaders are often wanting to learn strategies from other food shelves and find common approaches to similar challenges. In the coming year, FFEN will:

- Host more online peer-learning spaces for food shelf leaders to connect on topics
- Share out more connections between food shelf leaders to foster a more deeply connected network through food sourcing program characteristics

Fall 2025: Conclusion

The Fall 2025 Strategic Food Sourcing round reveals a sector demonstrating remarkable resilience amid significant uncertainty. Food shelves are prioritizing the Most Important Foods shoppers need most, making data-informed decisions, and enhancing accessibility—all while navigating federal funding uncertainty, food availability constraints, and unprecedented demand.

The consultations during September and October 2025 captured a critical moment as food shelf leaders managed ongoing challenges intensified by the federal government shutdown and concerns about SNAP benefit delays. Despite these pressures, leaders remained committed to serving their communities with dignity and sustainability in mind.

Three key themes emerged consistently:

- **Strength in strategic thinking:** Food shelves are using data to guide sourcing, control costs, and communicate impact
- **Strain on capacity:** Rising demand is outpacing available resources, forcing difficult decisions about service levels
- **Need for partnership:** Strong food shelves depend on strong food banks, expanded sourcing networks, and engaged communities

FFEN remains committed to supporting food shelf leaders through this evolving landscape by providing tools, fostering peer connections, and helping translate challenges into actionable strategies. The food shelves across Minnesota, western Wisconsin, and eastern North Dakota are doing essential work under increasingly difficult circumstances—this report documents both the challenges they face and their creativity, commitment, and care for the neighbors they serve.

Strategic Food Sourcing Resources

- Sample Food Sourcing Analysis Report
- Strategic Food Sourcing Report Metrics
- Food Category Overview
- Additional Food Purchasing Information

January – June 2025 Food Sourcing Data

- Jan-June 2025 Data Insights Webinar
- Jan-June 2025 Data Insights Slides
- Jan-June 2025 Program Characteristics
- Jan-June 2025 Campus Pantry Insights

As a reminder, all materials can be found on FFEN's Website at https://ffen.org/resource-hub/.