Foundation For Essential Needs

FFEN Strategic Food Sourcing: Spring 2026 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, which consolidates their data across 10 food categories, paired with a 60-minute tailored consultation. Sessions are an opportunity to 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 in response to shifting community demand and food availability.

Spring 2026 Strategic Food Sourcing Round: Data Insights

The Spring 2026 Strategic Food Sourcing round captures food sourcing and service statistic data from July to December 2025. This analysis covers 226 food shelf sites across Minnesota, western Wisconsin, and eastern North Dakota during a period marked by:

- The passing of HR 1 with changes to federal programs like SNAP and Medicaid; SNAP Ed funding was eliminated
- A prolonged federal government shutdown is causing uncertainty regarding November SNAP benefits
- The start of Operation Metro Surge created fear in many communities and negatively impacted immigrant food access

Insights from this data set were shared with food shelf and sector leaders via a live webinar on March 17, 2026. The full webinar recording and slides are available here. Key findings for the full data set during this timeframe include:

- **Full dataset overview:** Participating sites represent 2.5 million food shelf visits, over 43 million pounds of food distributed, and $6.8 million leveraged for food purchases.
- **Most important foods:** The median percentage remained relatively stable compared to the previous period (56.6% vs. 57% in Jan–June 2025), indicating continued prioritization of fresh produce, protein, and dairy despite ongoing challenges.

- **Cost management:** Cost per individual increased, reaching over $3 per visit for the first time since tracking began. Cost per pound sourced increased by $.03 to $.25/lb.
- **Service levels:** Pounds distributed per individual remained fairly consistent compared to the previous period, though still below 2022 levels.
- **TEFAP access:** TEFAP pounds per individual remained steady, though there was wide variation in TEFAP sourcing across participating sites.

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, revealing the following insights:

- **By service size:** Larger programs (476+ households/month) achieved greater efficiency with lower costs per visit and per pound while maintaining higher percentages of most important foods.
- **By visit frequency:** Sites offering monthly visits showed the widest variability in sourcing patterns and tended to have higher costs.
- **By food rescue percentage:** Food shelves with greater access to food rescue resources distributed more food per individual visit; sites with over 50% of their food coming from food rescue had a cost per pound that was $.30 lower than those with no food rescue.

Spring 2026 Consultation Round: Overview

Strategic Food Sourcing Consultations for the Spring 2026 round occurred from March to May 2026 and included 114 individual sessions across 154 unique food shelf sites. It is important to note that many sessions took place as food shelves were starting to dial back alternative distribution methods that were a response to Operation Metro Surge.

Consultation sessions with FFEN staff 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.

Spring 2026: Food Shelf Profile

The 114 organizations (154 total sites) meeting with FFEN for consultations were a subset of the full list of participating food shelf sites. This group included 22% new to FFEN's Strategic Food Sourcing process. Most operated with full shopper choice models (81%), were open multiple days per week (71%), and maintained annual food budgets (76%). Visit frequency ranged from monthly (51%) to as-often-as-needed access (11%), with service sizes

spanning from small sites serving 1-60 households monthly (8%) to extra-large sites serving 476+ households monthly (38%).

Spring 2026: Consistent Question

At the start of each consultation, FFEN staff asked food shelf leaders to identify their top priority from four options: (1) Increasing most important foods, (2) Meeting the demand for food, (3) Reducing costs, or (4) Creating new ways for community members to access food. The question served dual purposes — capturing a sector-wide snapshot and tailoring each session to the food shelf's unique needs.

Results Across Consultations with 114 Organizations:

- **42% — Increasing Most Important Foods:** Even under budget pressure, food shelves were deeply intentional about protecting fresh produce, protein, and dairy above all else — as one coordinator put it, *"keeping the food that we know is most important in here while still trying to reduce cost."*
- **18% — Meeting the Demand for Food:** Leaders described demand as their north star — while record client numbers, SNAP uncertainty, and immigration enforcement fears stretched systems to their limits, making sure no one was left without food was the center of every operational decision.
- **17% — Creating New Ways to Access Food:** Driven by immigration enforcement fears and transportation barriers, leaders were actively building new access models — home delivery, mobile distributions, satellite sites, proxy shopping, and extended hours — with a shared conviction that access itself is the work.
- **8% — Reducing Costs:** Leaders described cost reduction as a constant balancing act while holding firm that spending less should never mean giving shoppers less of what matters most.

While leaders often noted all four options felt important, the exercise created internal alignment for multi-staff teams and revealed the sector's heightened concern about capacity during a period of significant uncertainty.

Spring 2026: 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 a strong understanding of the food categories that matter most to shoppers: fresh produce, protein, and dairy. Most sites met or exceeded the goal of providing at least 50% of their food in these categories. Leaders consistently emphasized

that these foods are both the most nutritious and the most expensive for families to purchase on their own, making them a top priority for food shelf investments. As one leader put it: *"My goal was always to be able to give out more protein and more produce. Because when you go to the store, those are the more expensive things."*

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

- **Strategic Purchasing:** Directing dollars toward produce, protein, and dairy while relying on food rescue, donated foods, and TEFAP for shelf-stable and lower-priority items.
- **Proactive Sourcing:** Monitoring food bank ordering platforms daily and expanding partnerships with local farmers, meat markets, grocery stores, community gardens, and retail rescue programs to fill supply gaps.
- **Targeted Funding and Cost Management:** Applying for grants to fund high-cost essentials such as milk, eggs, and fresh produce (when not subsidized by food banks or state funding), and substituting lower-cost proteins like chicken or turkey when beef prices rise.
- **Promoting Access and Choice:** Creating prominent produce displays at the front of the food shelf and offering unlimited produce to encourage selection and reduce waste.

Expanded Food Vendors and Sources

Food shelf leaders demonstrated creativity and persistence in expanding their food sources beyond their primary food bank. While food banks remain the foundation of most operations, some food shelves are building relationships with local farmers, butchers, retailers, and vendors to maintain a reliable supply of fresh and nutritious foods.

Common strategies include partnering with local farmers and CSA programs for produce, eggs, and meat; ordering from various food banks and vendors based on price and availability; and pursuing grants to purchase high-priority foods such as protein and dairy. Purchasing from wholesalers and local vendors can fill gaps when food bank inventory is limited. Although these approaches increase cost, they help ensure more consistent access to the foods shoppers need most.

Food shelves are also increasingly using targeted food drive strategies to obtain shelf-stable goods, freeing up purchase dollars for perishable items. Leaders across the network described shifting away from general donation asks toward specific, item-focused campaigns that fill gaps. Others shared similar success using social media for real-time targeted asks, noting that specific requests — a particular item, a specific quantity — tend to generate an immediate community response.

Data-Informed Decision Making
Leaders across the network are increasingly using data from FFEN's FSA Reports and their own tracking systems to guide purchasing decisions, manage inventory, and communicate with boards, volunteers, and donors. This marks an important shift from relying on intuition to making evidence-based decisions. Food shelves are using data to identify their highest-cost spending categories, monitor measures such as pounds per person, cost per visit, and the percentage of most important foods, and adjust ordering based on available inventory and storage space. Many are also sharing data as a storytelling tool to build support and alignment within their organizations. In addition, shopper surveys are helping leaders better understand which foods are most requested, and several leaders reported using data to successfully advocate for increased food budgets and other resources.

Responding to Disruption: Alternative Access Models and Community Response
The consultation period was marked by significant disruption — SNAP benefit delays, looming ongoing cuts, and Operation Metro Surge in late 2025 and early 2026 caused many immigrant families to stop visiting food shelves. Leaders described this as one of the most difficult periods their organizations had experienced, and responded quickly and creatively to make sure families could still access food.

Home delivery expanded rapidly as in-person visits dropped. As one leader explained, *"We did hundreds of deliveries. We knew how to pack all the food boxes and customize them — but it was also finding volunteers and staff who were willing to deliver, because we didn't want to bring our food shelf truck in front of people's homes."* Proxy systems were expanded so neighbors could shop on behalf of one another, and trusted community partners — schools, churches, and mutual aid groups — became essential bridges to families afraid to come in. As one leader shared, *"There was a very well-organized group of Hispanic and Latino individuals who stepped up to take care of their community. They felt safe to go out, to help, to support."*

Beyond home delivery, food shelves expanded mobile distributions, curbside pickup, drive-through models, satellite sites at schools and apartment buildings, and community food lockers offering discreet 24-hour access. As one leader noted, *"We developed partnerships with five different schools, community-based organizations, and grassroots orgs."* Throughout this period, leaders were also intentional about protecting client privacy, sharing updates publicly while keeping delivery information for immigrant families confidential.

For some food shelves, the SNAP disruption also galvanized community support. One leader reflected, *"When the SNAP thing happened, I got interviewed so many times that people just knew about us. I can't even tell you how many food drives happened. I can't even tell you how much money folks sent us."* Together, these responses reflect a meaningful shift toward flexible, community-based access models — and a sector that meets people where they are.

Spring 2026: Food Shelf Challenges

Across consultations, food shelf leaders reported difficult decisions as rising demand collided with a shrinking supply of free food. TEFAP reductions, fewer donations, and less reliable retail rescue during a similar time frame are forcing shelves to purchase what they once received at no cost — driving up expenses when budgets are most constrained.

Food Supply Contraction and Rising Costs
The most pervasive challenge across consultations was the erosion of free food at the same time demand is growing. TEFAP reductions, declining retail rescue, and shrinking food bank variety have forced shelves to purchase commercially — at prices elevated by inflation and tariffs — driving deficits at sites that previously operated within budget:

- TEFAP frozen protein variety has lessened; selections now dominated by dry beans and peanut butter
- Ground beef prices at food banks have doubled or tripled in some cases; eggs are frequently unavailable for months at a time
- Food shelves now routinely purchase canned vegetables, proteins, and shelf-stable items previously obtained through TEFAP or rescue
- Rescue produce often arrives spoiled or at end-of-life; as grocers improve inventory management, rescue volume and reliability continue to decline
- Several shelves reported going significantly over budget; the cost per individual served is trending upward across the network

Increased Demand and Access Barriers
Demand has grown across nearly all regions, driven by economic pressures and SNAP benefit uncertainty, with sharp spikes in November–December 2025. Immigration enforcement created a secondary crisis: shelves serving immigrant communities saw dramatic drops in foot traffic, forcing rapid pivots to proxy shopping, home delivery, and mobile distributions — all straining staff capacity and budgets:

- Record or near-record shopper counts through early 2026; one immigrant-focused site went from 300+ families per week to 50–60 during ICE enforcement activity
- Shelves pivoted quickly to DoorDash, church volunteers, and proxy shopping to maintain access for clients afraid to leave home — resource-intensive arrangements difficult to sustain
- Demographic shifts: more working families, multi-generational households, students, and seasonal workers

Funding Sustainability and Staff Capacity
Short-term funding structures and lean staffing models are creating compounding pressure on food shelf operations. A surge of community donations during late 2025 provided temporary relief, but it is not guaranteed to continue:

- Federal funds for local food sourcing have largely expired; grant funding is often tied to specific categories, limiting flexibility and long-term planning
- Staffing/succession risk is significant — multiple shelves rely on a single coordinator who is aging, burning out, or planning to leave, with no clear succession path
- Volunteer attrition is attributed to burnout, age, and, in some cases, political disagreement over policies around serving immigrant communities

Storage, Access, and Infrastructure Constraints
Physical infrastructure limits the ability of many food shelves to accept available food, serve diverse communities, or expand capacity to meet demand:

- Lack of freezer space limits uptake of TEFAP meat and bulk protein, even when available; food bank minimum order thresholds are not achievable at smaller sites
- Misalignment between delivery schedules and distribution hours leaves perishables with limited shelf life before they can reach shoppers
- Halal meat, culturally specific produce, and staples like maseca and fufu are in high demand but unavailable through many food bank ordering systems
- TEFAP items like garbanzo beans accumulate as surplus because they don't reflect what local populations cook; shelves invest in recipe resources and cooking education to increase uptake
- The ICE enforcement period damaged trust with immigrant communities; rebuilding participation has required intentional outreach and assurances about data privacy

Spring 2026: Food Shelf Action Steps

During consultation sessions, food shelf leaders worked with FFEN staff to identify concrete actions for meeting shopper needs while stewarding donor dollars — including timelines and resources needed to complete the work. Following each session, leaders received documentation of their agreed-upon action steps. Across these discussions, several recurring themes emerged. For leaders revisiting previous action steps, 91% reported making progress toward their goals.

Source and Protect the Most Important Foods: Prioritize fresh produce, protein, and dairy by maximizing food bank and TEFAP resources, expanding food rescue partnerships, and pursuing local purchasing and grant opportunities as needed.

- Replace low-quality proteins with more nutritious alternatives and source eggs, halal meats, and frozen fruit more consistently
- Pursue grants specifically for produce and protein
- Expand food rescue partnerships, explore new vendors, and build relationships with local and cultural food suppliers
- Offer unlimited access to free items like produce and milk rather than applying limits

Manage Costs and Redirect Spending: Reduce spending on lower-priority items to protect and grow investment in the most important food categories.

- Monitor cost per pound over time and use spending data to eliminate or reduce items that don't align with shopper priorities
- Set or refine a formal food budget and continue using it intentionally
- Review per-visit limits to better balance shopper needs with available supply

Share Data to Strengthen Support: Use the Food Sourcing Analysis report to build internal alignment, demonstrate stewardship, and deepen relationships with donors and the broader community.

- Present findings at board meetings, post in the volunteer room, and share with staff
- Incorporate data into donor thank-you letters, grant applications, and community presentations
- Launch targeted donation drives for specific high-need items based on report insights

Improve Tracking and Organizational Systems: Capture a more complete and accurate picture of food sourcing and operations to inform better decision-making over time.

- Track local purchasing data separately and submit to FFEN for inclusion in future reports
- Implement electronic tracking systems to replace manual processes and improve visit tracking
- Acquire additional equipment, redesign shelf layouts, and develop policy and procedure documentation to support sustainability and leadership transitions

Expand Access and Community Engagement: Build new pathways for community members to reach food and deepen connections with partners, donors, and neighbors.

- Explore delivery programs, second monthly visits focused on fresh food, and community food cupboards
- Connect with neighboring food shelves to coordinate coverage and share surplus
- Strengthen donor communication and community storytelling through newsletters, social media, and targeted asks

Spring 2026: 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.

Progress Tracking and Accountability
FFEN tracks action steps and changes from round to round, giving food shelf leaders an accountability partner who helps them see how their work is evolving, celebrate progress, and stay on track toward their goals. This round, 91% of leaders with previous action steps reported making progress. Going forward, FFEN will also begin maintaining a running history of each food shelf's accomplishments and changes across consultation rounds — enabling more personalized support over time and helping food shelves preserve institutional knowledge.

Increased Use of Trendline Data
When possible, FFEN requests data going back two years to make the best use of newly developed trendlines that show change over time for key metrics. Trendlines give us a better understanding of where a food shelf has been and where it may be headed, while also surfacing seasonal patterns and outliers. Leaders are often able to identify programmatic and demand shifts when reviewing trendline data — and to distinguish whether a metric change is an isolated outlier or part of a directional trend. FFEN is already increasing the use of trendlines in consultations and is working to make them more user-friendly and easier for leaders to share with boards, donors, and other audiences.

Broader Dissemination of Insights
FFEN plans to share data insights more broadly through press releases, donor communications, and digestible online content — helping donors and community members better understand the challenges food shelves are navigating and why their support matters.

Spring 2026: Conclusion

The Spring 2026 Strategic Food Sourcing round took place during one of the most challenging periods the food shelf sector has faced in recent memory. Food shelf leaders navigated simultaneous pressures — shrinking free food supplies, rising costs, record demand, and the profound human impact of immigration enforcement on the communities they serve — with remarkable resilience, creativity, and commitment.

What stands out most from this round of consultations is not the scale of the challenges, but the quality of the response. Leaders expanded access models, deepened community partnerships, stretched every dollar further, and showed up for their neighbors in ways that went far beyond stocking shelves. At the same time, the data tells a clear story: the

structural pressures food shelves are absorbing — free food reductions, expiring grants, staffing strain, and rising food costs — are not temporary. They require sustained attention, strategic investment, and a sector that continues to learn and adapt together.

FFEN remains committed to supporting food shelf leaders through this work — not just with data and reports, but with the tools, connections, peer learning, and accountability structures that help leaders make decisions with confidence and lead their organizations with clarity. The 91% of leaders who made progress on their action steps this round is a testament to what becomes possible when food shelf leaders have the right support at the right time.

The work ahead is significant. But so is the network doing it.

Strategic Food Sourcing Resources

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

July - December 2025 Food Sourcing Data

- July - December 2025 Data Insights Webinar
- July - December 2025 Data Insights Slides
- July - December 2025 Program Characteristics
- July - December 2025 Campus Pantry Insights

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