

2026 Artisan Grain Collaborative Member Survey Executive Summary

Introduction

The Artisan Grain Collaborative (AGC) is a regional network of farmers, processors, end-users, and advocates working to strengthen a diverse regional grainshed in the Midwest. AGC connects stakeholders across the grain value chain to facilitate and enrich cross-sector relationships; to create, elevate, and pilot specific activities, tools, and resources that support a thriving and equitable Midwest grainshed; and to deepen consumer connections and engagement with grain chain actors.¹

The AGC Annual Member Survey (survey) helps inform, support, and track the growth of the Midwest grainshed, as well as AGC's unique role within this broader system. **AGC is the only entity collecting this type of information across the Midwest grain value chain**, and the results provide valuable insight into production, purchasing, needs, and the critical relationships that underpin the Midwest grainshed.

This Executive Summary presents key findings from the 2026 survey, which reflects member activity and experiences in 2025.

Survey Background & Process

AGC launched its first survey in 2023 as part of a broader strategy to better understand, articulate, and track the state of the Midwest grainshed and the unique role AGC plays in its development. The survey has since been conducted annually. Each dataset represents a snapshot of current AGC membership and provides insight into how members grow, process, purchase, and support regional grains. Because AGC membership evolves over time, each year's survey includes a slightly different set of respondents, allowing for cautious year-to-year comparisons.

“Connecting with another stakeholder along the value chain through AGC is like a secret passcode that opens the door to conversations that would normally be hard to access.”

- Survey respondent

While the survey has been refined over time to improve clarity and incorporate emerging topics, core questions have remained consistent to allow for longer-term analysis and tracking of trends.

To maintain membership with AGC, members are required to complete the annual survey. **The 2026 survey had an 86% response rate**, a decline of 7% from the 2025 survey. Members received multiple reminders and personalized outreach to encourage participation. Members who did not respond to the 2026 survey are welcome to reapply for membership in May of 2026.

Later in 2026, AGC will conduct member focus groups and discussions to explore how to better utilize the survey data, so that AGC members continue to find value in responding. Additionally, AGC recently received funding to partner with the University of Wisconsin-Madison Center for Integrated Agricultural Systems to perform advanced survey analysis on the first four years of survey data.

¹ AGC 2025-2027 Strategic Plan

Key Themes

Several key themes emerged from the 2026 survey that highlight both the growth of the regional grainshed and the challenges that remain.

- **AGC's membership continues to reflect the full breadth of the regional grain value chain**, reinforcing AGC's unique strength as a cross-sector network rather than a single-industry group. (Member Snapshot, Member Experience)
- **AGC builds and maintains essential relational infrastructure for the regional grainshed**. Members consistently identify connection, collaboration, and knowledge-sharing as the most valuable aspects of AGC membership. (Member Snapshot)
- **Interest in regional grains remains strong across the value chain represented by AGC members**. Both farmers and end-users report plans to maintain or expand their participation in regional grain markets, indicating continued growth potential. At the same time, purchasing trends tell a more complex story: when one outlying large-volume buyer is removed from the survey data, overall purchasing in 2025 declined from previous years. This may reflect ongoing shifts in AGC's membership composition, including business closures and changes in sourcing strategies. It is unclear currently how pervasive these shifts are across the larger ecosystem of Midwest industry end-users. (Supply Summary; Demand Summary)
- **Market development remains a persistent challenge**. Despite strong supply and demand, members report difficulty connecting products to markets, and express a desire for more consistent and accessible market opportunities. (Supply Summary; Demand Summary)
- **Member needs are evolving from relationship-building to value chain coordination**. While relationships remain foundational, members increasingly seek to translate these connections into stronger and more consistent economic opportunities. (Member Snapshot; open-ended survey responses)

Data Highlights

- **AGC's 77 farmer members collectively planted a total of 26,367 acres in food-grade grains in 2025**, with 48% of farmer members growing 40 or fewer acres of food-grade grains. (Supply Summary)
- **AGC's 111 end-user members purchased 26,934 tons of local and regional grains**; a small number of large purchasers account for a significant portion of total volume. (Demand Summary)
- **Most AGC member businesses operate at a relatively small scale**, with the majority reporting no part-time or full-time employees. (Labor & Business Capacity)
- **Most of AGC's 60 members who identify as a support organization/institution, researcher, and/or advocate have seen an increased interest in local and regional grains** among the people with whom they work. (Support Summary)

Possible Trends to Watch

- **Shifts in crop mix.** Soybeans became the most widely planted crop (25%) in 2025, replacing hybrid corn as the leading crop. Hybrid corn sunk to the sixth most planted crop. This raises questions about whether this reflects changing economic markets, agronomic decisions, or simply membership composition. (Supply Summary)
- **Increased use of grain elevators.** Sales to grain elevators increased to become the most common market channel, which may indicate changes in market access, pricing, or unsold food-grade grain. It also may be connected to the shifts in crop mix and their associated market channels, and/or membership composition. (Supply Summary)
- **Secondary markets vs. profitability.** Across AGC there are ongoing discussions regarding securing secondary markets for grains that do not meet food-grade specifications, yet 92% of farmer members report knowing what to do with grain that does not meet food-grade specifications. This suggests that while farmer members know what to do, they still have challenges in securing **profitable outlets** for their products when they do not meet food-grade specifications. (Supply Summary)
- **Emerging interest in larger-scale and wholesale market channels.** Both farmers and industry end-users indicate growing interest in expanding into new wholesale and institutional markets, suggesting potential opportunities to develop larger-scale and more consistent market pathways. (Supply Summary; Demand Summary)
- **Concentration in production and purchasing.** A very small number of large growers and/or buyers can significantly influence both the total and specific production and purchasing information, possibly masking trends or leading to incorrect narratives. (Supply Summary; Demand Summary)

Labor & Business Capacity

AGC member businesses span a wide range of sizes and structures, though most operate at relatively small scales. Most respondents report having no part-time or full-time employees (54%, and 55% respectively).² Additionally, most members do not employ seasonal labor (75%) nor contract labor (83%).³

A smaller subset of members report larger teams, up to a maximum of 100 full-time and 33 part-time employees, reflecting the diversity of business models within AGC's membership.⁴

In the upcoming year, 51% of respondents expect their labor needs to remain the same and 33% expect them to increase.⁵

Survey responses also suggest that differences in business size can shape how members experience AGC. Some larger-scale businesses noted that AGC programming does not fully align with their needs, while some smaller-scale members expressed similar concerns. Because these insights come from open-ended responses, it is unclear how widespread this sentiment is or how members are defining being "too large" or "too small" to benefit from AGC programming.

² Q61- In 2025, how many people worked in your operation in each of the following categories...

³ Ibid

⁴ Ibid

⁵ Q62- Looking ahead to 2026, how do you expect your staffing needs to change?

Member Snapshot

AGC's membership continues to reflect the full breadth of the regional grain value chain, bringing together farmers, millers, bakers, brewers, distillers, food businesses, maltsters, researchers, support organizations, and advocates. Farmers (29%) and bakers (16%) continue to represent the largest segments of the network.⁶

The overall composition of AGC's membership has remained relatively stable across roles in the grain value chain, year over year, despite a growing overall number of members. **This reinforces AGC's unique strength as a cross-sector network rather than a single-industry group.**

Geographically, AGC members remain concentrated in the Upper Midwest, with the largest number of members based in Wisconsin (25%), Minnesota (22%), Illinois (21%), and Michigan (13%); alongside smaller concentrations of members in Ohio (7%), Indiana (5%), and Iowa (4%).

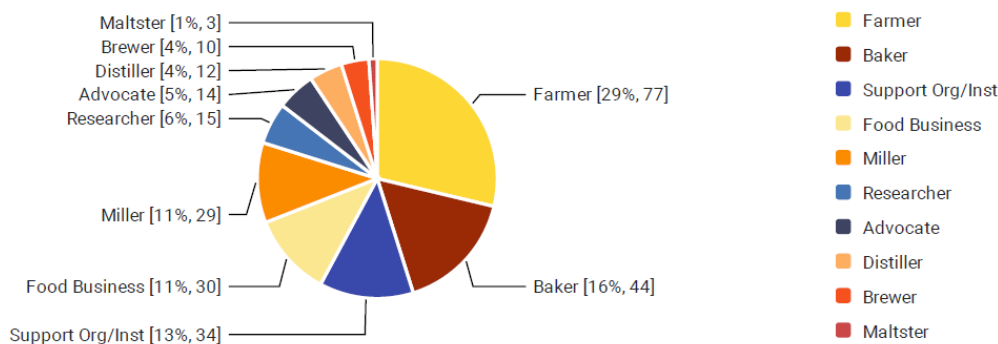
What do members value about AGC?

Consistent with responses from prior years, AGC members identify access to information (87%) and connections (66%) as the core benefits of membership.⁷ Participation in AGC leads to real relationship-building. **Seventy-seven percent of members report that they have expanded their network through AGC,** forming or strengthening an average of five new relationships per member.^{8,9} These relationships most often lead to peer learning and knowledge-sharing (85%), solidarity (47%), and business transactions (37%).¹⁰

When asked why they would encourage a peer to join AGC, members reference the strong, values-aligned network that AGC provides, highlighting the opportunities to connect with peers across the grain value chain, their ability to access trusted resources, and the opportunity to be part of a collaborative community working

Role in the Grain Value Chain

209 Responses



Role	2026	2025	2024	2023
Farmer	29%	28%	24%	23%
Baker	16%	19%	19%	17%
Food Business	11%	11%	15%	15%
Org./Institution	13%	11%	12%	16%
Brewer & Distiller	8%	8%	9%	8%
Researcher	6%	6%	8%	7%
Miller, Maltster, Cleaner	12%	11%	7%	9%
Advocate	5%	4%	6%	5%

⁶ Q4- Your role in the grain value chain is the primary job that you do in the grainshed. Select your primary role(s) in the grain value chain. (Please select up to your 2 most applicable roles)

⁷ Q45- What were the benefits of being a member of AGC in 2025? (Select all that apply)

⁸ Q11- Have you increased the number of relationships you have within the Midwest grain value chain because of your membership with the Artisan Grain Collaborative?

⁹ Q12- Please estimate the number of new relationships that you made in 2024 and/or the number of relationships that you deepened with people, businesses, and/or organizations along the grain value chain due to your participation in AGC.

¹⁰ Q13- What are the results of these relationships? (Select all that apply)

to strengthen the regional grainshed. Many also emphasize AGC’s unique ability to open doors to cross-sector and cross-region relationships and opportunities that may be otherwise difficult to access.¹¹

Why do AGC members grow and purchase local and regional grains?

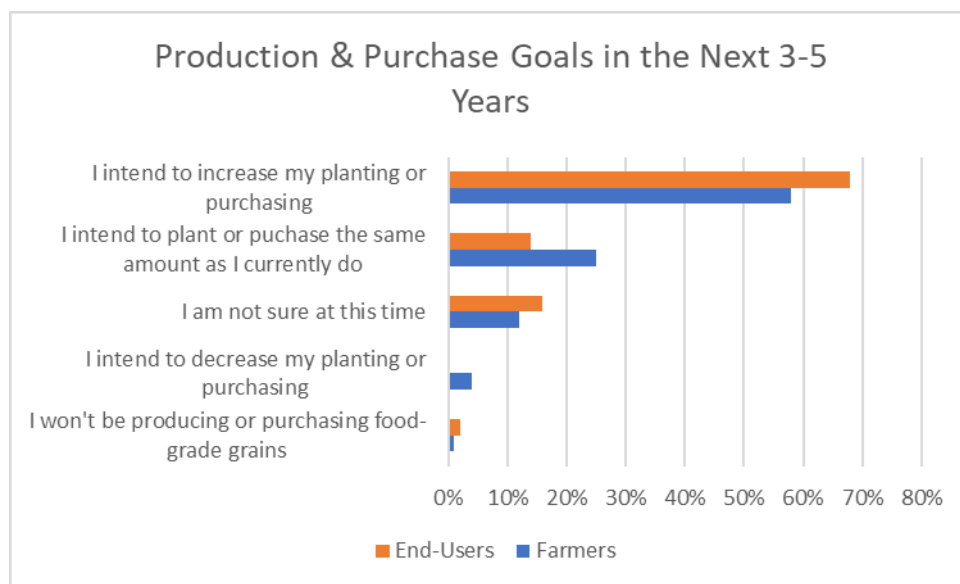
Members indicate shared values as key drivers of why they grow or buy regional food-grade grains. Farmers most often cite a desire to produce food for people to eat (64%), diversifying crop rotations (64%), achieving economic viability (52%), and diversifying markets (52%) as their top reasons for growing food-grade grains.¹² Similarly, buyers emphasize supporting local farmers (86%), being connected to the regional food systems (54%), the environmental benefits of buying local (50%), differentiating their products (39%), and superior flavor and quality (37%).¹³

What does the future hold?

Looking ahead, **both producers and buyers signal continued interest in regional food-grade grain markets.** A majority of farmer members intend to maintain or increase their acreage of food-grade grains over the next three to five years, while most industry end-users anticipate maintaining or increasing their purchasing of regional grains.^{14,15}

The 2026 survey results also suggest an important evolution in member needs. While

relationships and knowledge-sharing remain foundational, **members are increasingly seeking opportunities to translate these connections into stronger and more consistent market outcomes.** This includes identifying reliable buyers and suppliers, expanding access to markets, and strengthening pathways for business transactions across the value chain.¹⁶ Together, these findings reflect both the strength of the AGC network and the opportunities ahead.



¹¹ Q44- If you were encouraging a peer to join AGC, what are the top one to three reasons you’d give for why they ought to join?

¹² Q16- What are the top three reasons that you grow food-grade grains? (Select your top three choices)

¹³ Q34- What are the top three reasons that you purchase local or regional food-grade grains? (Select your top three choices)

¹⁴ Q15- In the next 3-5 years, what are your food-grade grain production goals?

¹⁵ Q33- In the next 3-5 years, what are your business goals in terms of the amount of local or regional food-grade grains that you purchase?

¹⁶ Q45- Are there specific ways in which you would like to receive more support from AGC?

Supply Summary

What grains do our members grow?

When responding to this survey, **77 members identified as farmers** and were subsequently asked to answer a set of questions that pertain to their food-grade grain production and sales in 2025.¹⁷

	2026	2025	2024	2023
Respondents	77	73	58	50
Total Acres	26,367	24,184	19,897	21,327
Average	342	331	343	427
Median	45	45	40	50
Minimum	0	0	0	0
Maximim	3,506	4,649	4,690	5,000

AGC farmer members planted a total of **26,367 acres in food-grade grains in 2025** (including cereals, pseudocereals, legumes, and oilseeds), with 48% of farmer members growing 40 or fewer acres of food-grade grains.¹⁸ Farmer members report a wide range in the share of their acreage dedicated to food-grade grains, from 0% to 100%, with both the average and median at approximately 50%.¹⁹ This suggests variation in how producers incorporate food-grade grains into their overall farming operations. Farmer members reported that an average of 70% of their grain that was grown with the intention of being food-grade met food-grade specifications.²⁰ Grain that did not meet food-grade specifications was primarily used on-farm as animal feed (24%), seed (23%), or sold to the commodity market/grain elevator (19%).²¹ Only six farmer members indicated they did not what to do with their grains that did not meet food-grade specifications.²²

Eighty-four percent of the total acreage planted in food-grade grains was planted in the following six crops:²³

- Soybeans (25%)
- Wheat (20%)
- Other (primarily popcorn) (14%)
- Rye (8%)
- Dry Beans (8%)

Grain	# of members growing this grain	TOTAL Acres	AVERAGE Acres	MEDIAN Acres	MIN Acres	MAX Acres
Barley	5	410	82	100	5.0	200
Buckwheat	7	920	131	200	5.0	250
Corn (hybrid)	16	1,524	370	60	1.0	1,891
Corn (OP)	18	360	20	5	0.1	175
Dry Beans	14	1,718	123	29	0.2	500
Einkorn	6	155	26	6	0.0	90
Kernza	4	171	43	31	10.0	100
Oats	12	418	35	21	3.0	100
Oilseeds	4	772	193	160	17.0	435
Rye	17	1,737	102	50	2.0	440
Soybeans	14	5,324	380	225	10.0	1,320
Spelt	6	261	44	16	5.0	170
Wheat	38	4,305	113	55	1.0	500

Other includes 2,586 acres of popcorn

Grains grown by fewer than 3 members are removed to protect anonymity of individual respondents

¹⁷ Q4- Your role in the grain value chain is the primary job that you do in the grainshed. Select your primary role(s) in the grain value chain. (Please select up to your 2 most applicable roles)

¹⁸ Q6- How many total acres of food-grain grains did you plant in 2025? (include cereals, pseudocereals, legumes, and oilseeds)

¹⁹ Q7- In 2025, what percentage of your total tillable acreage was intended for food-grade market channels?

²⁰ Q13- In 2025, approximately what percentage of grain that you grew with the intention to sell to a food-grade market met food-grade specifications?

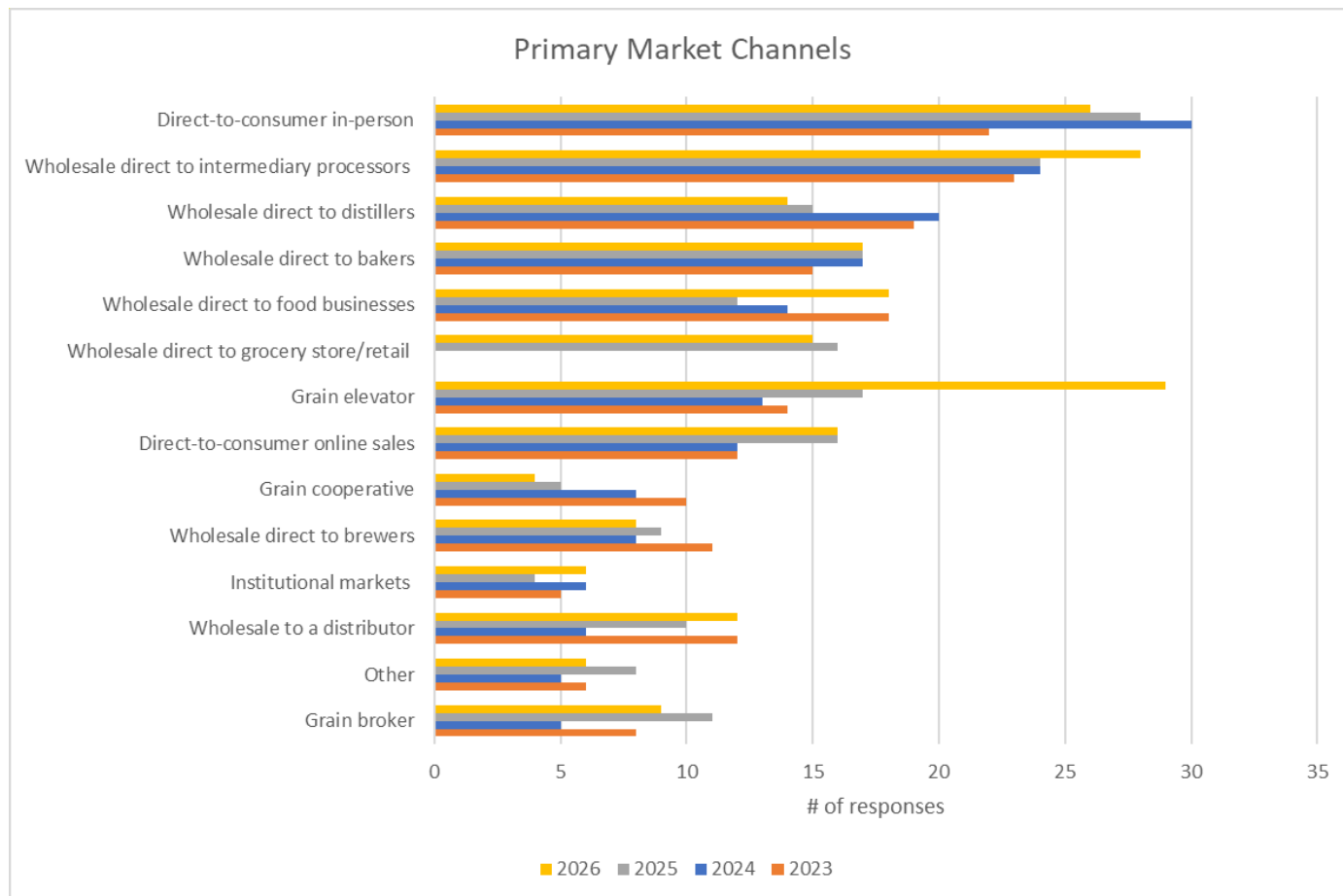
²¹ Q14- In 2025, if your grains did not meet food-grade specifications, what did you do with them? (Select all that apply)

²² Ibid

²³ Q8 – Please indicate the types of food-grade grains you grew in 2024 by entering the number of acres you grew in the box.

How do AGC farmer members market and sell their grain?

Since the survey's inception in 2023, **direct-to-consumer in-person sales** have remained the most consistently used market channel for farmer members (consistently holding at ~25-30 members per year). In 2026, sales to **wholesale direct to intermediary processors** (36%) and to **grain elevators** (38%) both saw notable increases, with sales to grain elevators increasing to become the most common market channel.²⁴ Several mid-tier channels (wholesale to distillers, bakers, and food businesses) remain relatively stable or fluctuate modestly. Overall, the data may indicate a gradual shift toward larger-scale or intermediary markets alongside a still-strong direct-to-consumer presence.



Fifty-two percent of farmer members report that they were able to find a market for all the food-grade grains that they grew.²⁵ The crops that some members struggled to sell included rye (12%), OP corn (12%), and wheat (9%).²⁶ An inspiring **82% of farmer members say that growing and selling food-grade grains increased the viability of their farm.**²⁷

²⁴ Q9- What are the primary market channels through which you sell your food-grade grains? (include cereals, pseudocereals, legumes, and oilseeds) (Select all that apply)

²⁵ Q12 Are you NOT ABLE to find consistent markets for any of the grains that you grow? (If so, please select all that apply from the list below.)

²⁶ Ibid

²⁷ Q84- Does growing and selling food-grade grains increase your overall farm viability, however you define it?

While 25% of farmer members report that they are not interested in expanding into other market channels, other farmer members indicate their interest in selling to the following markets in 2026:²⁸

- Wholesale direct to distillers (27%)
- Wholesale direct to food businesses/manufacturers (26%)
- Wholesale direct to bakers (26%)
- Wholesale direct to brewers (25%)
- Wholesale direct to intermediary processors (miller, maltster) (25%)

Demand Summary

What grains do AGC members buy?

When responding to this survey, **111 members identified as bakers, brewers, distillers, food businesses, millers, and/or maltsters²⁹** and were subsequently asked to answer a set of questions that pertain to their food-grade grain purchasing habits in 2025.

	2026	2025	2024	2023
Respondents	111	110	93	105
Total Tons	26,934	10,390	8,438	2,630
Average	243	94	91	39
Median	4	3	4	4
Minimum	0	0	0	0
Maximum	20,000	5,700	3,500	1,100

AGC members purchased a total of **26,934 tons of local and regional food-grade grains** (including cereals, pseudocereals, legumes, and oilseeds).³⁰ Despite this large increase from previous years, the median has remained relatively stable, indicating that a small number of large purchasers are driving this increase. One respondent indicated they purchased 20,000 tons. If we remove this outlying purchase, 2026 shows a decline in the overall amount of local and regional food-grade grains purchased by AGC members.

Because each year's survey data is a snapshot in time, the data is highly sensitive to who is – and who is not – represented each year. Between 2025 and 2026, several higher-volume end-users dropped out of the dataset due to lapsed membership with AGC (due to not completing the annual survey), business closure, or changes in their sourcing models away from local and regional grains. Meanwhile, new and existing end-users – many of whom tend to be smaller businesses – are demonstrating high levels of engagement with regional grains, but with inherently lower purchasing volumes. Taken together, it is unclear whether this signals an overall shift in the demand for local and regional grains or simply a change in the current representation of AGC members.

²⁸ Q80- In 2026, are you interested in trying to sell into any of the following market channels that you are not currently? (Select all that apply)

²⁹ An individual member may identify as more than one role in the grain value chain.

³⁰ Q19- How many total tons of local or regional grains* (whole grains, flour, malt, etc.) did you purchase for use in your business in 2025?

Grains from local and regional sources accounted for 63% of the total grain purchased on average, with a range of 0–100%.³¹ **Fifty percent of respondents purchased a minimum of 90% of their grains from local and regional sources.**³² Seventy-three percent of the respondents purchased identity-preserved grain, flour, malt, etc., while 21% did not and 6% were unsure.³³ End-user members purchase from an average of six farms and two mills.³⁴

Grain	# of members purchasing this grain	TOTAL Tons	AVERAGE Tons	MEDIAN Tons	MIN Tons	MAX Tons
Barley	18	533	30	2	0.03	320
Buckwheat	25	44	2	0	0.03	16
Corn (hybrid)	24	1,376	57	5	0.05	593
Corn (OP)	32	376	12	2	0.01	140
Dry Beans	14	74	5	0.2	0.00	51
Einkorn	16	73	5	1	0.01	50
Emmer	6	25	4	0.5	0.08	20
Kernza	13	42	3	0.5	0.01	13
Oats	28	390	14	0.4	0.01	305
Oilseeds	5	2	0	0.3	0.03	1
Rice	3	2	1	0.5	0.10	1
Rye	58	482	8	1.1	0.01	96
Spelt	37	139	4	1.0	0.01	40
Wheat	69	2,955	43	3.5	0.01	1,464

Grains purchased by fewer than 3 members are removed to protect anonymity of individual respondents

How do AGC members market and sell their grain-based products?

AGC members who purchase local and regional grains for use in their products are most likely to market and sell these products via **direct-to-consumer in-person methods** (59%), **wholesale direct to a grocery store or other retail establishment** (44%), or **direct-to-consumer via online methods** (37%).³⁵ This data is consistent with information from previous years.

While 30% of respondents indicated they are satisfied with their current market channels, some industry end-users indicate their interest in selling to the following new market channels in 2026:³⁶

- Institutional markets (schools, business campuses, hospitals, etc.) (23%)
- Wholesale to a distributor (19%)
- Wholesale direct to a grocery store or other retail establishment (18%)
- Direct-to-consumer online sales (18%)

³¹ Q20- In 2025, what percentage of your overall grain (whole grains, flour, malt, etc.) purchases were from local or regional sources?

³² Ibid

³³ Q22- In 2025, did you purchase identity-preserved* grains, flour, malt, etc.? *Identity-preserved means that you can identify the farm that produced the grains.

³⁴ Q23- From how many farms and/or mills did you purchase in 2025?

³⁵ Q30 What are the primary market channels through which you sell your products? (Select all that apply)

³⁶ Q85- In 2026, are you interested in trying to sell into any of the following market channels that you are not currently?

Which grains do AGC members want to purchase?

Respondents were asked to identify grains (type and form) that they would like to buy but are **unable to find** as well as grains (type and form) that they would like to buy but are **unable to afford**.^{37, 38} Forty-two percent of respondents indicated they were able to find all the grains they wanted to buy. Of those who could not, the most common grains (type and form) that they wanted to purchase but couldn't find a consistent source for were whole wheat (19 respondents), malted barley (14 respondents), and flaked oats (13 respondents). **Barley is the most common grain, across all forms, that members respondents would like to buy but cannot find a source**; thirty-one respondents indicated they were interested in purchasing barley in one or more forms. This remains consistent with data from previous years.

Eighty percent of respondents indicated there were no grains they wanted to buy but couldn't afford. Of those who identified a desired grain they could not afford, whole and milled/ground einkorn (11 respondents), Kernza® (10 respondents), and emmer (8 respondents) were the most frequently cited grains. Respondents were also asked whether they had an unmet demand for specific USDA-certified organic or certified gluten-free grains. In general, few respondents indicated this need; however, of those who did, USDA-certified organic barley (8 respondents) and certified gluten-free buckwheat (5 respondents) were the most common.^{39, 40}

Support Summary

How do AGC members support the development of the regional grain chain?

When responding to this survey, **63 respondents identified as a support organization/institution, researcher, and/or advocate** and were subsequently asked to answer a set of questions that pertain to their programming, research, communications, and alignment with AGC mission and goals. These respondents describe undertaking a wide range of activities to support the regional grain value chain, including purchasing and promoting local grains, conducting research and field trials, hosting educational events, providing technical assistance, and building connections between farmers, processors, and buyers. Many also highlighted efforts to expand markets, develop new products and grain varieties, engage in policy and advocacy work, and strengthen relationships through networks like AGC, even as some faced funding or infrastructure challenges.⁴¹

Ninety percent of respondents indicated that they share some AGC resources: most frequently member contact information (57%) and/or specific resources (48%).⁴² Seventy-three percent said that they frequently share information about local and regional food-grade grains with their community, and **72% have seen an increased interest in local and regional grains** among the people with whom they work.⁴³

³⁷ Q26- Please use the following matrix to indicate the type and form of grains that you would like to purchase from regional/local sources but have been unable to find a consistent source.

³⁸ Q27- Please use the following matrix to indicate the type and form of grains that you would like to purchase from regional/local sources but have been unable to afford.

³⁹ Q28- Please select the appropriate box if you struggled to source any of the following ingredients as Certified Organic ingredients.

⁴⁰ Q29- Please select the appropriate box if you struggled to source any of the following as Certified Gluten-free ingredients.

⁴¹ Q36- In 2025, please describe the ways in which you connected with, supported, and/or promoted the regional grain value chain.

⁴² Q40- What AGC resources did you share? (Select all that apply)

⁴³ Q38- Please respond to the following statements from your experiences in 2025, agree and strongly agree.