



Market Analysis and News Branch

1428 South King Street
Honolulu, HI 96814-2512

In Cooperation with the United States Department of Agriculture
National Agricultural Statistics Service, Pacific Region

Hawaii Commercial Agricultural Marketing Outlets 2020

Marketing outlets play a vital role in channeling on-farm products along the agricultural supply chain to other value-added producers and ultimately to end consumers. A recent commercial agriculture survey published by USDA-NASS¹ indicates that 23% of the 1,062 participating farmers and ranchers in Hawaii singled out insufficient access to marketing outlets as one of many barriers preventing them from engaging in further production expansion. State and county patterns of utilizing marketing outlets are also different.

Agricultural products are most commonly sold by intermediaries (brokers) between buyers and sellers. This is Hawaii State's top marketing outlet as are Hawaii County, and Kauai County. The remaining counties, Honolulu and Maui rely more on supermarkets/groceries/supercenters and produce wholesalers to market their products.

Brokers, on-farm producers, produce wholesalers, and supermarkets/groceries/supercenters (four leading marketing outlets) collectively account for 66.4% of total agricultural sales in Hawaii, 77.0% of sales in Honolulu, 68.7% of sales in Kauai, 61.3% of sales in Maui, and 60.5% of sales in Hawaii County (see Table 1).

On-line and e-commerce have emerged as primary marketing outlets for the state and counties, decreasing the traditional reliance on brokers, on-farm, produce wholesalers, and supermarkets/groceries/supercenters. These sales surpass those to restaurants and caterers by a wide margin.

Community supported agriculture (CSA), food hubs, and government facilities are less significant marketing outlets.

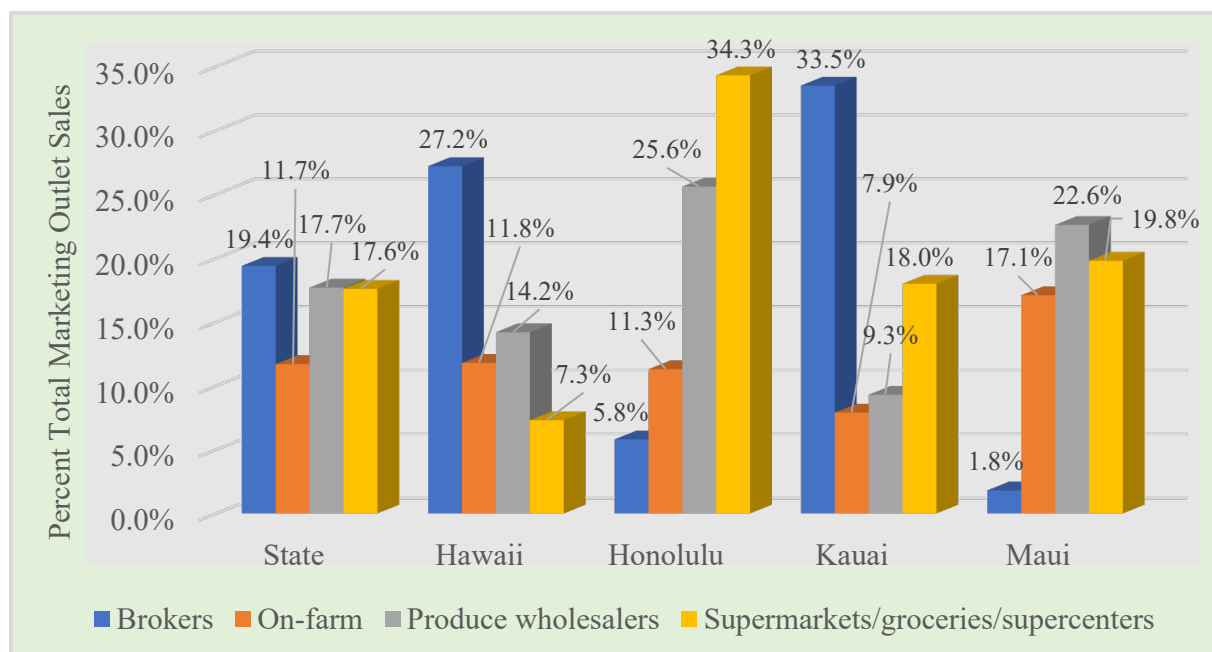
¹ USDA-NASS, November 2021. *Hawaii Commercial Agricultural Expansion Survey Highlights*. Available at: https://hdoa.hawaii.gov/add/files/2021/11/AGEXPAND_Nov2021r.pdf (Accessed 06.25.2022).

Table 1. Marketing Outlets of Agricultural Products Sold by State and County, 2020

	State	Hawaii	Honolulu	Kauai	Maui
Brokers	19.4%	27.2%	5.8%	33.5%	1.8%
CSAs	0.3%	0.1%	0.0%	1.8%	0.8%
Farmers markets	1.7%	2.1%	0.7%	1.5%	3.1%
Food hubs	0.2%	0.3%	0.1%	0.1%	0.6%
Meat packers	1.4%	2.4%	0.0%	0.4%	1.9%
On-line/e-commerce	8.4%	8.5%	8.4%	8.5%	7.4%
On-farm	11.7%	11.8%	11.3%	7.9%	17.1%
Produce wholesalers	17.7%	14.2%	25.6%	9.3%	22.6%
Restaurants/caterers	2.0%	1.3%	2.7%	2.5%	3.3%
Roadside stands	0.7%	0.1%	0.7%	0.2%	4.9%
Schools/hospitals/correction facilities	0.2%	0.2%	0.1%	0.1%	0.3%
Supermarkets/groceries/supercenters	17.6%	7.3%	34.3%	18.0%	19.8%
Other	18.7%	24.5%	10.3%	16.2%	16.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: USDA-NASS, Hawaii Commercial Agricultural Expansion Survey Highlights. Available at: https://hdoa.hawaii.gov/add/files/2021/11/AGEXPAND_Nov2021r.pdf (Accessed 06.25.2022).

Chart 1: Agricultural Marketing Outlets by State and County, 2020



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