



GLS GLOBAL
LOCATION
STRATEGIES®



2025



UNITED STATES

Best Places for Food Manufacturing

Key Trends & Market Update to the 2024
Industry Insights Report

letter from the GLS team

We all want to leave a legacy — to pour our lives into something that will survive us and thrive for generations to come.

It's why we start families, plant forests, design cities, and build businesses. On a fundamental level, we know that tomorrow matters as much as today, and we work to create the future we want for our children and generations to come.

Decision-makers who expand business operations and plan communities understand what's at stake better than most. It's your job to forge ahead, choosing a path forward that positively impacts lives. What a daunting responsibility. How do you know you've made the right choice? That you haven't overlooked some critical detail?

Global Location Strategies designed GLS Insights to answer questions like these and create clarity and confidence for decision-makers. With more than six decades of collective consulting experience, our team has advised industry leaders from around the world. While we've spent countless hours around board meeting tables, we've also spent our fair share wearing hard hats, walking sites in muddy steel toe boots, fighting off mosquitoes, and getting trapped by crossing trains. These experiences have allowed my team and I to make our mark while helping business and community leaders leave their own legacies.

Perhaps you are growing or expanding into a new market. Maybe you are scaling up a new technology. Your location investment decision will not only determine your success but will also have an indelible mark on the community, your company, and your employees. Wherever your location may lead, the GLS team is here to be your guide.

HERE'S TO TOMORROW,



Didi Caldwell

Didi Caldwell

President and CEO



Tess Fay

Tess Fay

Principal + VP of Location Intelligence

food manufacturing

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food manufacturing

ABOUT THE INDUSTRY

+ Fast Facts

The food manufacturing subsector encompasses industries that convert livestock and agricultural resources into consumable goods, either as intermediate products or for direct consumption. These industry groups are characterized by the types of raw materials, typically derived from animals or plants, that are processed to create food product.

Subsector Name Food Manufacturing

NAICS Code 311

Industry Groups

- Animal Food Manufacturing
- Grain and Oilseed Milling
- Sugar and Confectionery Product Manufacturing
- Fruit and Vegetable Preserving and Specialty Food Manufacturing
- Dairy Product Manufacturing
- Animal Slaughtering and Processing
- Seafood Product Preparation and Packaging
- Bakeries and Tortilla Manufacturing
- Other Food Manufacturing



1,801,200

Nationwide
Employment¹



35.8%

5-Years % change in
total wages²

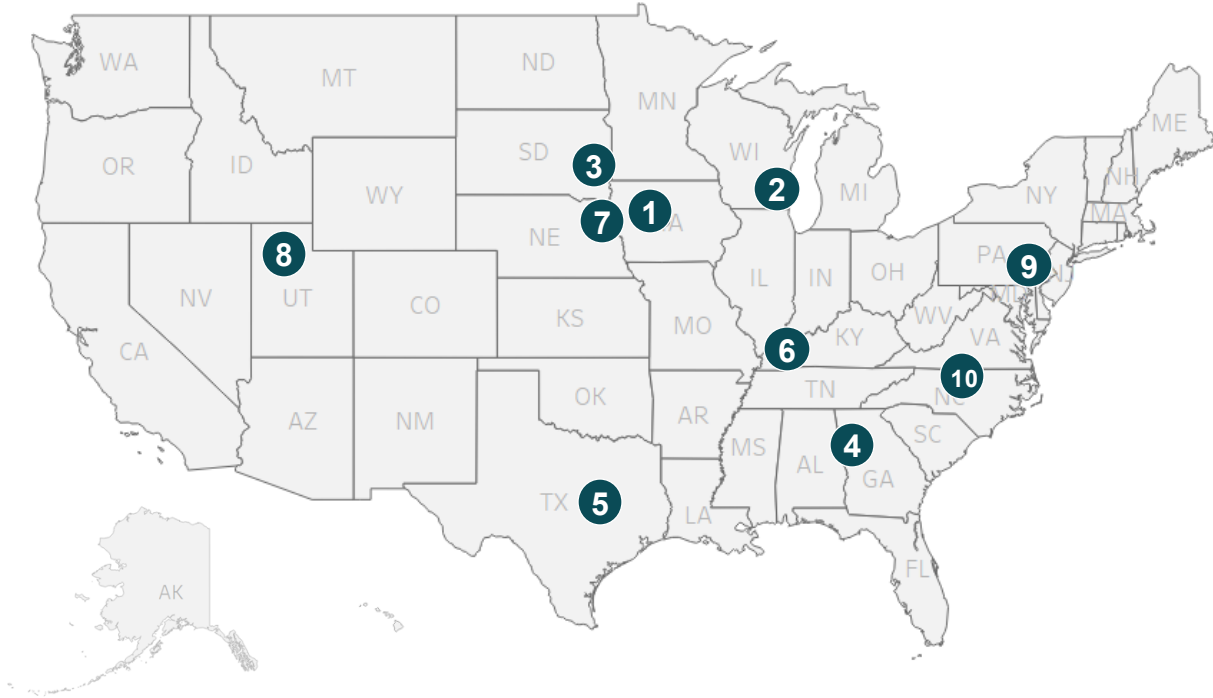


\$59.873

Average annual wage
per worker²

+ Recent Announcements

The map below highlights key investments in food manufacturing made since our previous report, covering the 2023–2024 period. It showcases some of the most prominent projects shaping the industry.



- 1 Daisy Brand** Boone, IA
Expansion: Dairy Products (2024)
\$626.5MM Investment, 106 Jobs
- 2 Kikkoman** Jefferson, WI
New Facility: Seasoning & dressing (2024)
\$560MM Investment, 83 Jobs
- 3 CJ Corporation** Sioux Falls, SD
New Facility: Fruits and Vegetables and Specialist Food (2024)
\$386MM Investment, 600 Jobs
- 4 Lee Kum Kee** LaGrange, GA
New Facility: Seasoning & dressing (2024)
\$288MM Investment, 267 Jobs
- Walmart** Robinson, TX
5 New Facility: Dairy Products (2024)
\$257.3MM Investment, 400 Jobs
- 6 Kitchen Food Company** Hopkinsville, KY
New Facility: Food Services (2024)
\$69MM Investment, 925 Jobs
- 7 James Richardson & Sons** South Sioux City, NE
Expansion: Grains & oilseed (2024)
\$220MM Investment, 342 Jobs
- 8 Groupe Le Duff** Salt Lake City, UT
New Facility: Bakeries & tortillas (2024)
\$217MM Investment, 300 Jobs
- 9 WK Kellogg** Lancaster, PA
Expansion: Snack Food (2024)
\$158.33MM Investment, 246 Jobs
- 10 Koch Foods** Mebane, NC
Expansion: Animal Slaughtering (2024)
\$145.5MM Investment, 128 Jobs

+ Industry Insights

The U.S. food manufacturing industry remains a vital pillar of the national economy and provides a strong opportunity for businesses seeking growth. As one of the largest manufacturing subsectors, representing 14% of manufacturing employees and 1.1% of total employment, it encompasses a vast network of producers, processors, and suppliers that transform raw agricultural products into the final goods. In recent years, the industry has undergone significant transformation, shaped by shifting consumer preferences, advancements in automation, supply chain disruptions, and evolving sustainability goals. For companies considering expansion or new facility investment in the U.S., understanding recent industry trends is essential to selecting optimal locations, identifying competitive advantages, and making informed investment decisions. While we covered broader trends in our previous report, this update focuses on what's changed recently and what it means for companies considering a new facility or expansion in the U.S.

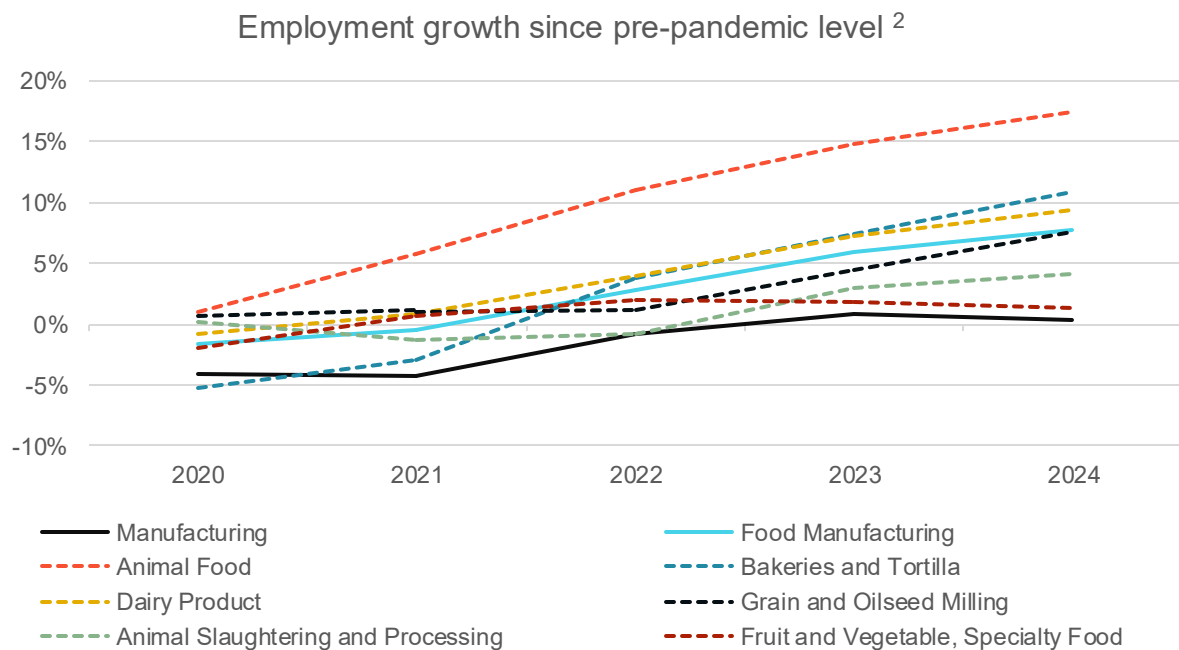
01 EMPLOYMENT TRENDS **Strong job growth underscores food manufacturing resilience**

For companies evaluating new facility investments in the food manufacturing subsector, understanding employment dynamics is essential for assessing the strength and sustainability of the local workforce pipeline and making strategic, data-driven location decisions. Since pre-pandemic levels, employment in food manufacturing has grown by 8%, significantly outperforming the national employment growth rate of 4% and the flat trends observed across the broader manufacturing sector.² Notable highlights include a 17% increase in Animal Food Manufacturing, 11% growth in Bakeries and Tortilla Manufacturing, and a 9% rise in Dairy Product Manufacturing², driven by growing consumer demand for premium pet food, convenient foods, and the rising popularity of high-protein diets.

This stronger employment recovery underscores food manufacturing as a stable and resilient investment opportunity. Looking ahead, food manufacturing employment is projected to grow 3.1% over the next five years further driven by Dairy Product Manufacturing and Animal Food Manufacturing, which are expected to see substantial increases of 6.1% and 5.1%, respectively.²

Chart 1. Cumulative employment growth in selected food manufacturing industry groups since pre-pandemic levels.²

Since pre-pandemic levels, Animal Food Manufacturing has recorded the strongest recovery, followed by Bakeries and Tortilla and Dairy Products.



Although employment growth in Animal Slaughtering has plateaued recently (just 1% in the past year)², the industry remains the largest employer in food manufacturing—providing a significant labor pool and accounting for over 30% of total sector employment. Even a modest 4% growth since pre-COVID translates to more than 21,500 new jobs², highlighting the scale and workforce capacity that site selectors must consider when evaluating regions with a strong presence in this subsector.

Conversely, seafood processing is the only segment within food manufacturing to show consistent employment decline (–9% since the pandemic)², underscoring growing structural challenges and raising concerns about long-term domestic competitiveness. The downturn stems from a combination of factors: stricter regulations, rising labor costs, and high operational expenses have driven much of the industry offshore. Coastal U.S. regions face added pressure due to the seasonal nature of seafood harvesting, which complicates staffing and limits year-round productivity. In contrast, offshore facilities benefit from lower labor costs and stable, year-round processing capacity. Meanwhile, an influx of low-cost imports has saturated the U.S. market, reinforcing offshoring trends and undercutting domestic output. While consumer demand for seafood remains relatively strong, it has plateaued in recent years, adding further headwinds. These conditions, compounded by COVID-19-related labor and supply chain disruptions, signal elevated risk for new investments in this segment, particularly in regions lacking cold chain infrastructure or workforce continuity.

While seafood processing is particularly sensitive to labor constraints, workforce challenges are emerging across the broader food manufacturing sector as well—despite a general recovery from post-COVID employment lows. One of the most pressing issues now facing the industry is the impact of tightening immigration policy. With over 20% of the food sector’s workforce comprised of immigrant labor³, stricter controls and further restrictions on work visas could lead to regional labor shortages, rising wages, and disruptions across supply chains. Mass deportations pose an additional threat, even to high-skilled industries. The American Immigration Council (AIC) reports that approximately 1.7 million undocumented immigrants — about 15% of the undocumented population — hold a bachelor’s degree or higher, and over 450,000 were enrolled in U.S. colleges and universities in 2022.¹¹ In manufacturing specifically, undocumented immigrants make up 5.4% of the workforce (over 700,000 people), while in agriculture, they account for 12.7% (more than 250,000 workers).¹¹ These numbers represent a labor force that cannot realistically be replaced by U.S.-born workers alone. The risks are particularly acute in labor-intensive subsectors such as animal processing, dairy, and specialty foods, where workforce demands are both high and difficult to automate.

Labor costs remain a central factor in site selection, and recent wage trends present both opportunities and cautionary signals. Since the pandemic, food manufacturing wages have increased by 23%, reaching an average of \$59,873 annually—outpacing general manufacturing wage growth (21%, now at \$84,207) but trailing the overall economy (26%).² Notably, wage growth appears to be moderating across industries; in food manufacturing, increases slowed to 4% over the past two years², suggesting a potential stabilization after several years of intense upward pressure.

Understanding further regional employment trends and dynamics is essential to making informed site selection decisions, as they reveal critical insights into a region’s labor availability, competitiveness, and long-term sustainability—ensuring workforce capacity and skills align with operational needs to optimize long-term productivity and growth potential.

02 INVESTMENT ACTIVITY

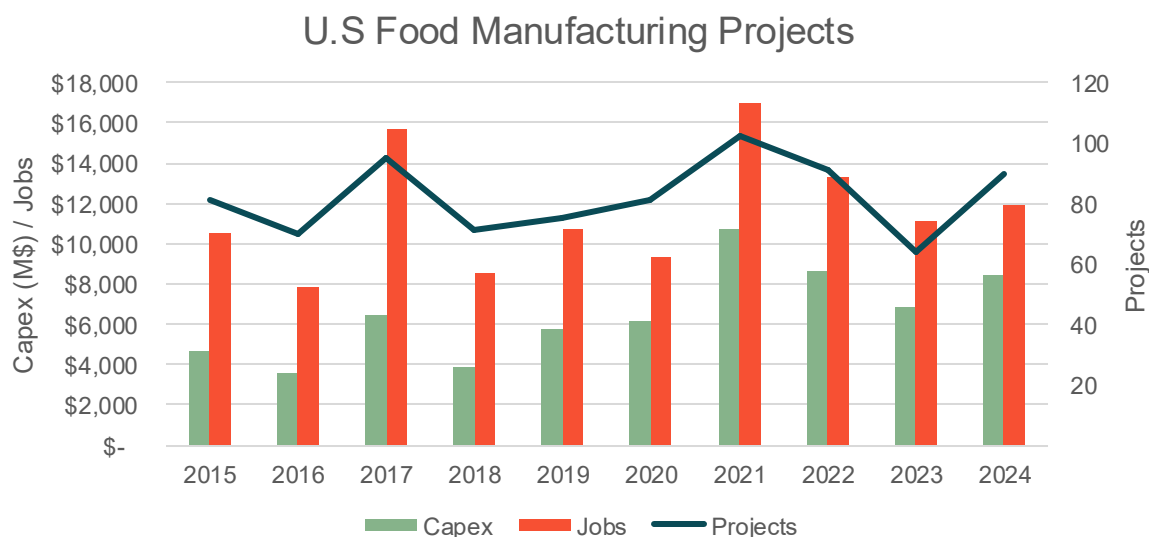
Capital-Intensive Growth Continues as East North Central and South Atlantic Regions Dominate as Investment Destinations

Understanding where food manufacturing investments are occurring and the trends driving them is critical for making informed site selection decisions. These trends reveal not only where capital is flowing, but also which regions offer the infrastructure, talent, and policy environments attractive to both domestic and international investors. The shift toward capital-intensive operations, as noted in the last report, continues—underscoring the growing role of automation and the importance of access to advanced logistics, utilities, and skilled technical labor. Meanwhile, regional dynamics—such as the East North Central’s broad sectoral strength or the South Atlantic’s appeal for foreign direct investment—offer valuable signals about competitive positioning and long-term market potential. For companies evaluating expansion or relocation opportunities, these insights help identify regions that align with operational priorities and are well-positioned to support sustained future growth.

According to fDi Markets data, 154 new food manufacturing projects were announced in the U.S. between 2023 and 2024, generating \$15.3 billion in capital investment and approximately 23,000 jobs.⁴ On average, each project contributed \$99 million in investment and created 149 new jobs, in line with the trend observed during 2021-2022.⁴ Projects remain capital-intensive rather than labor-driven, reflecting a sustained trend toward automation-driven investment. However, this dynamic may also be partially attributed to elevated construction costs, which rose sharply between mid-2021 and early 2023.⁵

Chart 2: Project activity in the U.S. Food Manufacturing.

The sharp rise in project activity in 2021 still stands out as a benchmark year for food manufacturing investment, driven by post-COVID supply chain rebuilding, surging demand for packaged goods, and expanded federal and state incentives.

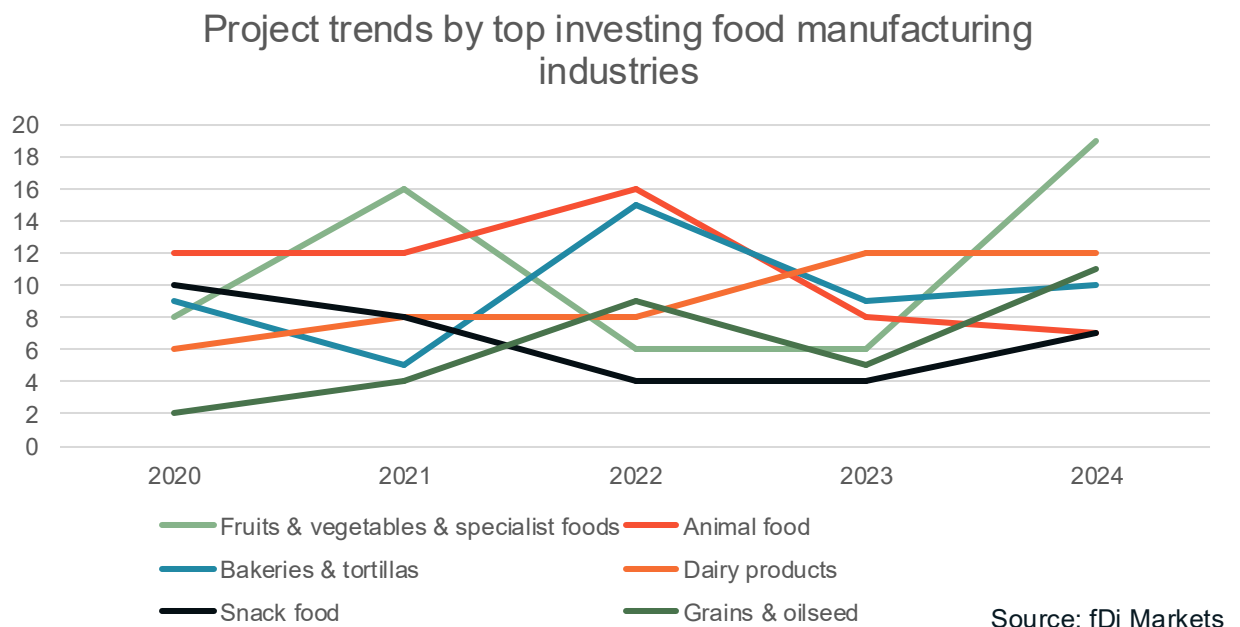


Source: fDi Markets

While 2023 marked a significant slowdown in project activity, 2024 brought a strong rebound, led by a sharp increase in Fruits & Vegetables and Specialty Foods investments. This segment alone recorded 19 new projects in 2024, up from just six in 2023, accounting for \$2.5 billion in capital investment over the last two years.⁴ It also led in job creation, accounting for nearly 4,800 new positions—roughly 21% of all food manufacturing jobs announced between 2023-2024.⁴ Dairy Products and Bakeries & Tortillas also sustained strong momentum, with 24 new projects totaling \$3.3 billion in capital investment and 19 projects totaling \$1.4 billion, respectively.⁴ Although Animal Food Manufacturing has tapered off from its 2022 peak, it remains active, with 15 projects over the past two years representing \$1.6 billion in investment.⁴ In contrast, Animal Slaughtering has experienced a notable pullback in investment, with only four new projects between 2023-2024 compared to 26 during 2021–2022.⁴ A noticeable shift within this industry is the rise of smaller, more specialized investments, often led by boutique operators pursuing vertically integrated models across both upstream supply and downstream distribution.⁶ One more industry group worth highlighting is Grains & Oilseeds, which saw increased investment in 2024 with 11 new projects—16 in total when including 2023.⁴

Chart 3: Trends by top investing food manufacturing industries.

Between 2023–2024, fruits & vegetables, specialty foods, and dairy led the nation in new investments, collectively accounting for nearly one-third of all food manufacturing projects.



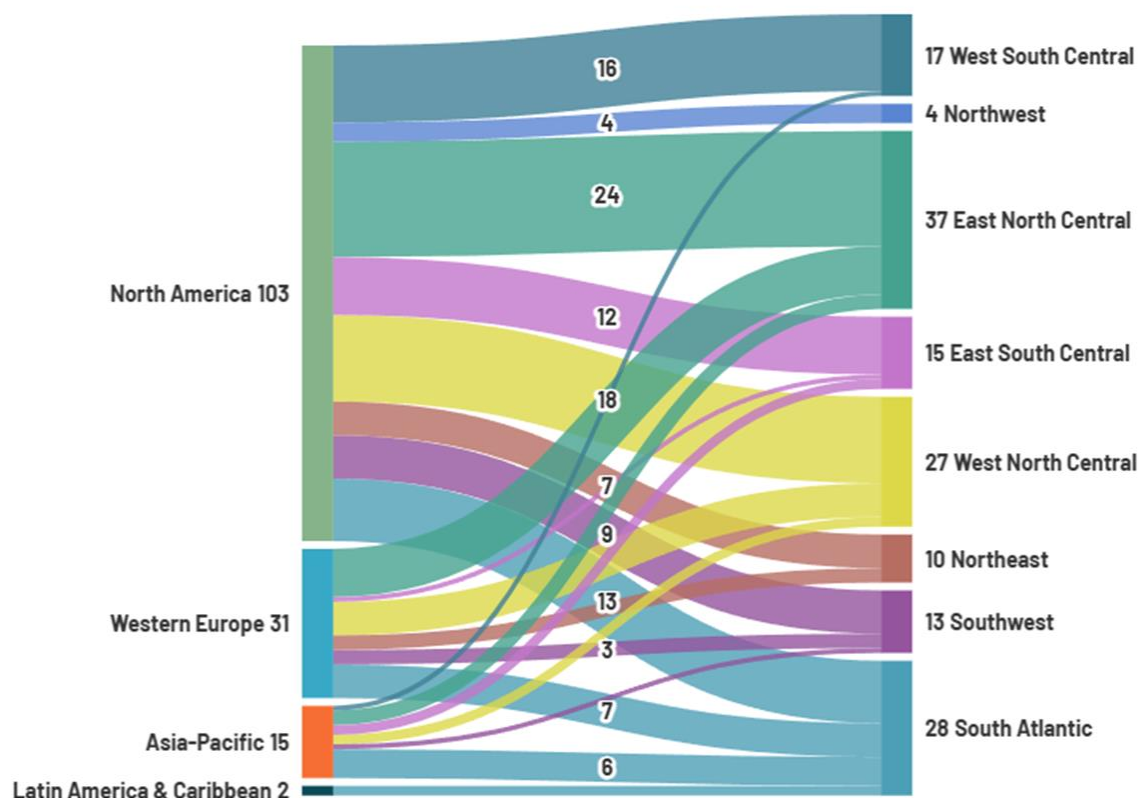
*The total number of projects does not add up to 154 because some projects do not have a specifically assigned origin or destination.

North America (the U.S. and Canada) continues to dominate food manufacturing project origination. Between 2023 and 2024, approximately 68% of new food manufacturing projects in the U.S. (103 projects) originated from within the region, with the U.S. alone accounting for 60% (92 projects).⁴ Western Europe originated 31 projects, while the Asia-Pacific region contributed 15 projects.⁴

Chart 4: Projects Origination by World Region into the U.S. regions (the regional map is included on the next page)*.

North America overwhelmingly leads in food manufacturing project origination into U.S. regions. East North Central attracted the highest number of projects (37 total), with significant contributions from North America (24) and Western Europe (9).

Projects Origination by World Region into the U.S. regions



*The total number of projects does not add up to 154 because some projects do not have a specifically assigned origin or destination.

Source: fDi Markets

Regional Project Activity Dynamics

In our previous report, the East North Central region, spanning from Wisconsin through Ohio, slightly trailed the South Atlantic, spanning from West Virginia through Georgia, in terms of project attraction. However, over the past two years, the East North Central has solidified its position as the top destination, representing 25% of all US food manufacturing announcements. By comparison, the second most active region for this investment, the South Atlantic, announced 19% of projects.

Regional Breakdown of the US

The US is divided into 8 regions as shown on the map below.

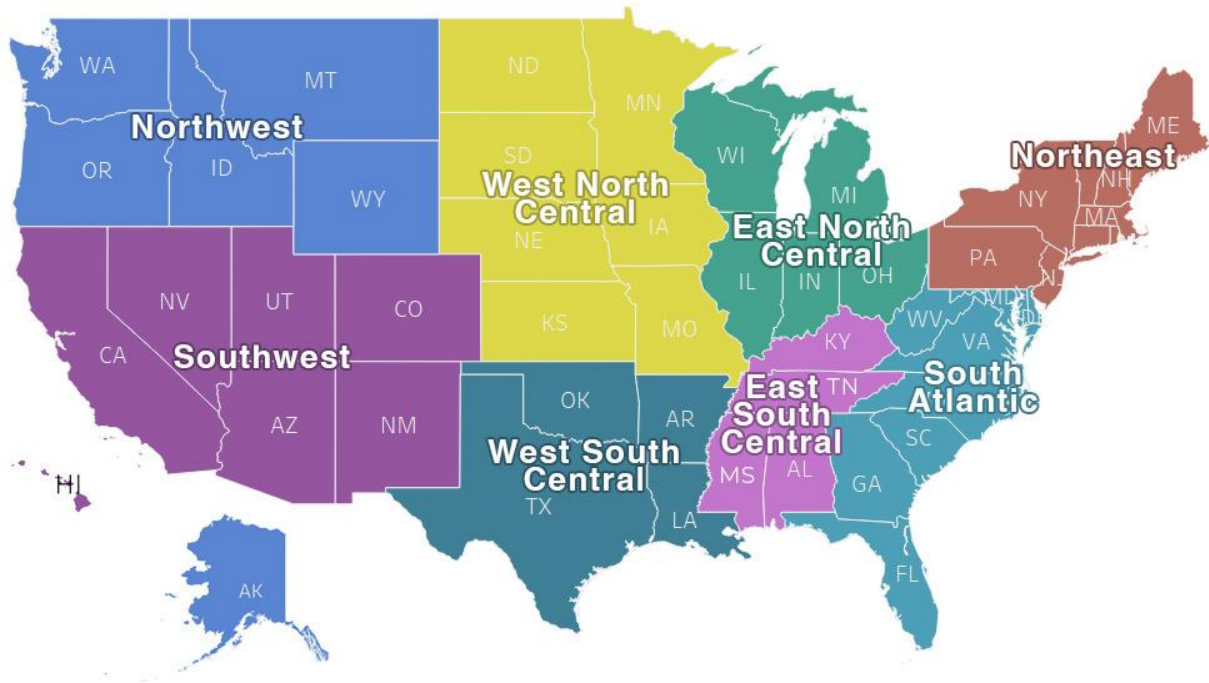
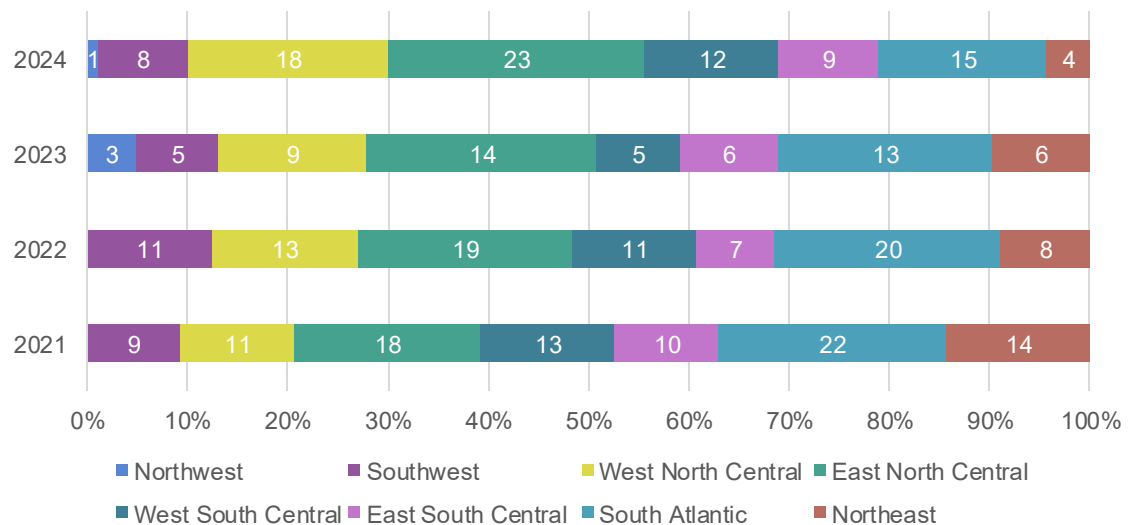


Chart 5: Projects Announcements by region – East North Central magnet for food manufacturing investment.

The East North Central and South Atlantic regions consistently attracted the highest number of project announcements from 2021 to 2024, with the East North Central region surging ahead in 2024.

Project Announcements by Region



Source: fDi Markets

When analyzing food manufacturing investment trends across U.S. regions, the East North Central region stood out for its broad-based strength across multiple sectors. It led in Fruits, Vegetables & Specialty Foods investments, capturing nearly one-third of all projects in the sector (8 projects). The region also played a dominant role in Seasoning, Snack, and Sugar Manufacturing, and was a key destination for both Dairy Products (4 projects) and Animal Food (4 projects), highlighting its appeal across a range of food processing activities.

The West North Central region, spanning from North Dakota through Missouri, also emerged as a major hub, particularly in Animal Food manufacturing, where it accounted for the highest number of projects (6), and in Grain & Oil manufacturing, securing nearly 40% of total investments (6 projects). It also attracted several Dairy Products investments (4 projects).

The South Atlantic region demonstrated strength in targeted areas of food manufacturing, leading the nation in Dairy Products investments with five projects. It also emerged as the top destination for Coffee and Tea manufacturing. These trends highlight the region's continued appeal for specialized and niche food production, reinforcing its role as a competitive player in select segments of food manufacturing.

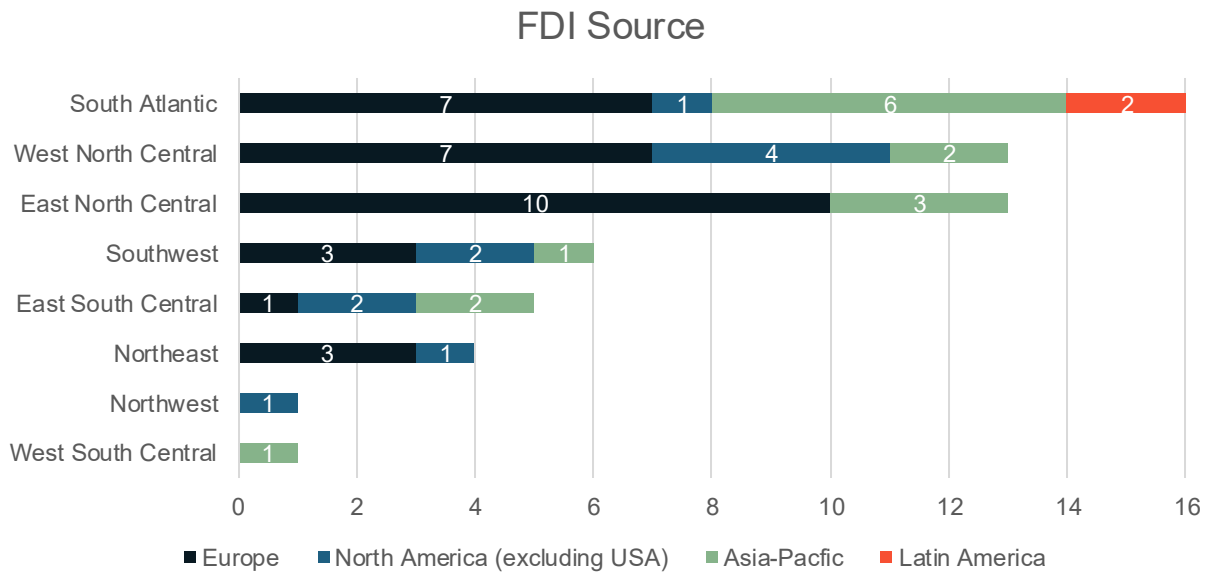
Meanwhile, the East South Central region, spanning from Kentucky through Mississippi, recorded a solid presence in Dairy Products as well, with 4 projects, showing rising regional competitiveness in this space.

Overall, these patterns underscore the dominance of the East North Central region over the past two years, and a decline in the attractiveness of the South Atlantic, though it remains one of the top regions. There has been a significant increase in investment attractiveness in the West North Central region.

In 2023–2024, the South Atlantic region led the nation in food manufacturing FDI projects, attracting 16 in total from 11 countries. This strong performance reflects a broader trend over the years, as the region has consistently captured the largest share of foreign direct investment in the sector, underscoring its continued appeal to global investors. The East North Central and West North Central regions followed, each accounting for 13 projects.⁴ While the East North Central region attracted the most European projects (10), the South Atlantic captured a significant number of Asia-Pacific projects (6, primarily Japanese), as well as European projects (7).⁴ It also received the only two projects from Latin America (Colombia and Brazil).⁴ Meanwhile, the West North Central region attracted the highest number of Canadian projects, with a total of four projects.⁴

Chart 6: FDI Source breakdown by World Region into the U.S. Region

South Atlantic Emerges as a leading hub for foreign direct investment in food manufacturing, followed by West North Central and East North Central.



Source: fDi Markets

Canada remains the leading foreign investor in the U.S. food manufacturing sector in terms of project count.⁴ In 2023 and 2024, Canadian investments accounted for 8% of total capital investment (\$1.2 billion USD) and contributed 16% of all jobs created (over 2,500 jobs) through 12 projects.⁴ The majority of Canadian investment went into fruits & vegetables & specialist foods, grains & oilseed, and animal food industries.⁴ Additionally, 9 out of 12 projects were expansion projects of existing operations.⁴

Japan also played a significant role, generating nearly 1,300 jobs (8%) and contributing \$1.72 billion (11%) in investment. Among European investors, Switzerland remains as the most active, with eight projects totaling nearly \$900 million (6%) in capital investment and creating 928 jobs (6%).⁴ When considering the cumulative number of projects from 2019 to 2024, Switzerland stands out as the top foreign investor overall.⁴

Geographically, Japanese investment was primarily concentrated in the East North Central and South Atlantic regions. Meanwhile, European projects were also prominent in the West North Central region.⁴

From a site-selection perspective, investment flows clearly signal where competitive advantages in U.S. food manufacturing are converging. Over the past two years, the East North Central region has strengthened its dominance, while the West North Central has emerged as a rapidly growing destination—driven by their ability to offer an optimal balance of cost efficiency and location quality. For companies planning greenfield builds or capacity expansions, tracking peer investments is an effective way to de-risk decisions: locations vetted by competitors have already demonstrated permitting efficiency, incentive alignment, and cost-efficient access to suppliers and markets. Growing clusters also foster opportunities for partnership, co-location synergies, and shared logistics, further reducing operational risk.

Conversely, regions struggling to draw projects can use these leaders as yardsticks—examining in detail which gaps in infrastructure, talent development, or policy support must be closed to compete. In short, mapping investment activity not only pinpoints today's most promising locations but also clarifies the strategic moves regions must make to become tomorrow's food-manufacturing hotspots.

03

REGULATORY SHIFTS

Regulatory Changes Reshaping the Food Industry

The U.S. food industry is in the midst of a transformative shift, as sweeping regulatory changes reshape compliance, safety, and international trade. The redefinition of “healthy” labeling and bans on controversial additives last year, together with the rollout of the Make America Healthy Again (MAHA) initiative and new trade policies, have created an increasingly complex landscape. As transparency requirements tighten and international trade rules are recalibrated, companies must factor these developments into their expansion plans, assessing how they will affect day-to-day operations and long-term growth. Firms that proactively adapt through innovation, reformulation, and strategic sourcing will not only stay competitive but also position themselves for sustained success in a rapidly evolving market.

In late 2024, the FDA introduced a new definition of “healthy”⁷, requiring food products to contain meaningful portions of core food groups and meet stricter thresholds for sodium, saturated fat, and added sugars. Earlier that year, the FDA banned long-used additives like Red Dye No. 3 and Brominated Vegetable Oil, forcing many brands to reformulate recipes and secure new suppliers.^{8,9} Adding further momentum, the MAHA initiative, launched in early 2025, is expected to produce a sweeping national strategy by August, likely resulting in even tighter rules around food composition, labeling, and ingredient safety. For food manufacturers, these developments are not just regulatory—they are operational. Reformulation demands new ingredient sources. Compliance may require in-house R&D or faster access to technical talent. Shifting consumer expectations and legal exposure require agility in how and where products are developed and produced. From a site selection standpoint, these pressures make certain factors more critical than ever:

- Access to clean-label ingredient suppliers
- Proximity to food science and formulation expertise
- State-level support for innovation and permitting agility
- Incentives tied to health-forward or sustainable production

Regions with strong agri-food ecosystems, robust R&D infrastructure, and responsive regulatory environments will be best positioned to support companies navigating this next wave of compliance and innovation. These regulatory changes are no longer just a compliance issue—they are becoming a strategic operational consideration. For location planning, that means health-driven policy trends should be closely monitored and treated as a core input in the site evaluation process.

04 T A R I F F I M P L I C A T I O N S

The Rising Impact of Trade Policy on Food Manufacturing

Another major headwind facing food manufacturing—alongside many other industries—is the sweeping wave of tariffs imposed by the current U.S. administration. In 2025, President Donald Trump enacted a series of executive orders introducing broad tariffs on imports from Canada, Mexico, China, the European Union, and many other trading partners. While intended to protect domestic industries and encourage onshore production, these measures are significantly reshaping the operating landscape for food manufacturers by driving up costs, disrupting supply chains, and increasing uncertainty across both sourcing and export markets.

Over the past decade, the U.S. food sector has grown increasingly dependent on imported ingredients. The share of imports in total food consumption rose from 13.5% in 2013 to 17.3% by 2022, according to USDA data.¹⁰ This trend heightens exposure to trade disruptions, tariffs, and geopolitical tensions, making sourcing flexibility and supply chain resilience essential factors in site selection and investment planning. While this trend affects the industry broadly, certain categories are particularly import-dependent—such as grain and oilseed milling products, fruits and tree nuts, sweeteners, vegetables and melons, and sugar and confections—with import shares ranging from 35% to over 50%.¹⁰

Much of this import volume comes from close trading partners: Canada and Mexico supply large shares of U.S. grain, sugar, livestock, fruits, and vegetables, with Mexico alone providing more than half of all fresh-vegetable imports.¹⁰ With tariffs now raising costs on these essential goods, many companies face growing pressure to rethink their sourcing strategies, cost structures, and expansion plans.

The increase in steel and aluminum tariffs is further complicating capital planning. These materials are essential for food packaging (e.g., cans, foil) and construction of new facilities. For manufacturers investing in new plants and those producing shelf-stable or canned goods, this could mean millions in added material and equipment costs.

Meanwhile, the risk of retaliatory tariffs from trading partners adds another layer of complexity. Countries like Canada, China, and the EU have already responded with their own duties on U.S. food exports—including high-value categories like pork, dairy, and produce. For companies with significant export exposure, this affects not just competitiveness abroad but also profitability and long-term planning. In some cases, retailers abroad have responded with informal boycotts, removing U.S. products from shelves entirely—a move that can disrupt revenue streams overnight.

These shifting trade dynamics are not just macroeconomic concerns; they are now core variables in the site selection process. Food manufacturers in their location strategy must weigh:

- Proximity to U.S. crop-producing regions to reduce reliance on tariffed imports
- Access to alternative or domestic packaging materials to offset steel and aluminum duties
- Export infrastructure and Free-Trade Zones (FTZs) to maintain international reach
- State and local incentives that help soften capital cost inflation due to tariffs
- Supply chain flexibility, including diversified sourcing and shorter logistics corridors

Tariffs are a tangible cost driver that impacts raw materials, construction, packaging, and access to global markets. For food manufacturers considering new facilities or expansions in the U.S., integrating tariff-related risks into site screening criteria is now essential for building long-term operational resilience.

food manufacturing

METHODOLOGY

GLS Insights is a vision from the talented team at Global Location Strategies, an internationally-recognized location strategy firm with more than 60 years of location strategy experience and offices in the United States and Europe.

Our reports exemplify the same rigor and transparency we bring to our site selection evaluations. To produce our GLS Insights rankings, we combine data from more than a dozen public and private data providers to analyze over 100 criteria in categories including demographic and labor force, workforce availability, infrastructure characteristics, industry ecosystem, educational readiness and pipeline, community well-being and livability, operation and regulatory environment, and operating costs.

+ Analysis

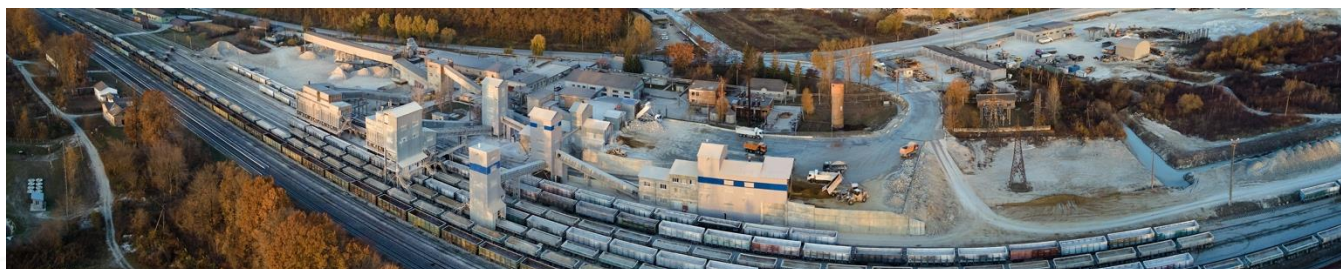
This analysis evaluates the location quality and estimated annual location-dependent operating cost for a food manufacturing operation in the 387 metros across the country. Metros, also referred to as Metropolitan Statistical Areas (MSAs), are defined by the US Census Bureau as regions with at least one urbanized area consisting of a city and its surrounding communities that are linked by social and economic factors with a minimum population of 50,000 residents.

The ranking consists of two components: **location quality score** and **location-dependent operating costs**. When combined, these factors identify metros with the optimal cost-benefit outcome.

Data Sources

Data came from various public and private data sources including:

- American Community Survey
- Bureau of Transportation Statistics
- Cato Institute
- CoStar
- County Health Rankings
- Federal Aviation Administration
- Federal Bureau of Investigation
- Federal Emergency Management Agency
- JobsEQ
- fDi Markets
- National Center for Education Statistics
- Tax Foundation
- US Bureau of Labor Statistics
- US Chamber Institute for Legal Reform
- US Energy Information Administration
- US Environmental Protection Agency

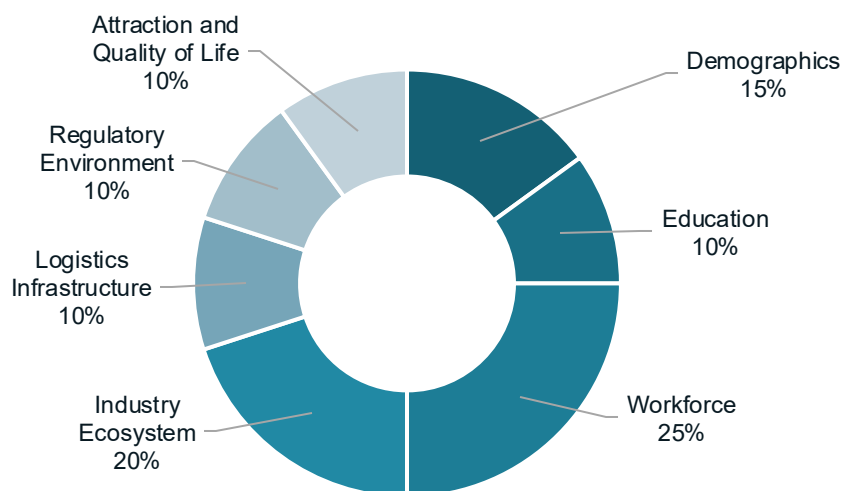


The **location quality score**, which contributes to two-thirds of each location's final ranking, assesses more than 100 datapoints to measure the competitiveness of each metro for food manufacturing, based the project profile of a typical food manufacturing operation.

The quality criteria included in the evaluation are grouped into the following primary categories:

- **Demographics:** Examines population characteristics with a focus on labor force readiness and the future workforce pipeline.
- **Education:** Assesses the talent pipeline, considering factors such as educational attainment, industry-specific awards, and the quality of the school system.
- **Workforce:** Evaluates the general manufacturing talent pool, with a specific focus on food manufacturing talent and industry presence.
- **Industry Ecosystem:** Includes the presence, outlook, and strength of supply chain-related industries.
- **Logistics Infrastructure:** Considers the overall road and interstate infrastructure, as well as accessibility to airports and rail networks.
- **Regulatory Environment:** Evaluates regulations, taxes, and the legal climate, with assessments conducted at the state level for each metropolitan area.
- **Attraction and Quality of Life:** Encompasses commuting patterns, cost of living, community health, and environmental factors like natural disaster risk and air pollution.

Primary Categories and Weights

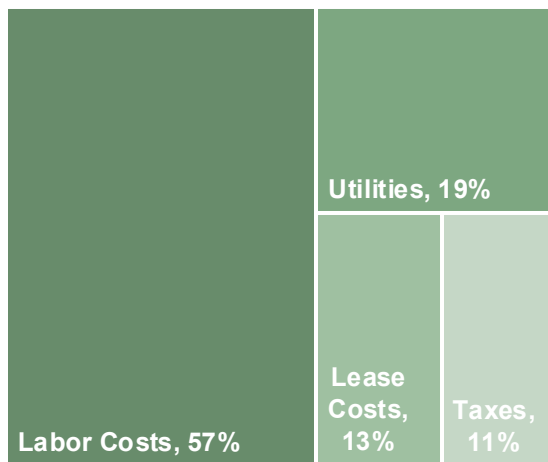


Each of the primary categories is comprised of a set of weighted secondary categories, which consist of a set of tertiary categories that are weighted and scored. The cumulative result is a detailed, data-driven evaluation of non-financial factors that will impact the viability and success of a typical food manufacturing project.

In addition to the quality analysis, the evaluation considers estimated, **location-dependent operating costs** that account for one-third of the location's final ranking. Costs that are immaterial and/or not location-dependent are not included in this analysis.

While often critical to a location's investment decision, logistics costs are highly variable and unique to each operation's supply chain, which includes the location and geographic spread of suppliers and customers as well as the commodities being transported. Therefore, logistics costs are also excluded from consideration in this analysis.

Location-Dependent Operating Cost Distribution¹²



The location-dependent cost criteria considered for this evaluation are grouped into the following primary categories:

- **Labor Costs:** Payroll for an industry-specific staffing profile, including benefits
- **Utilities:** Electricity, natural gas, water, and wastewater
- **Industrial Lease Costs**
- **Corporate Effective Tax Rate**

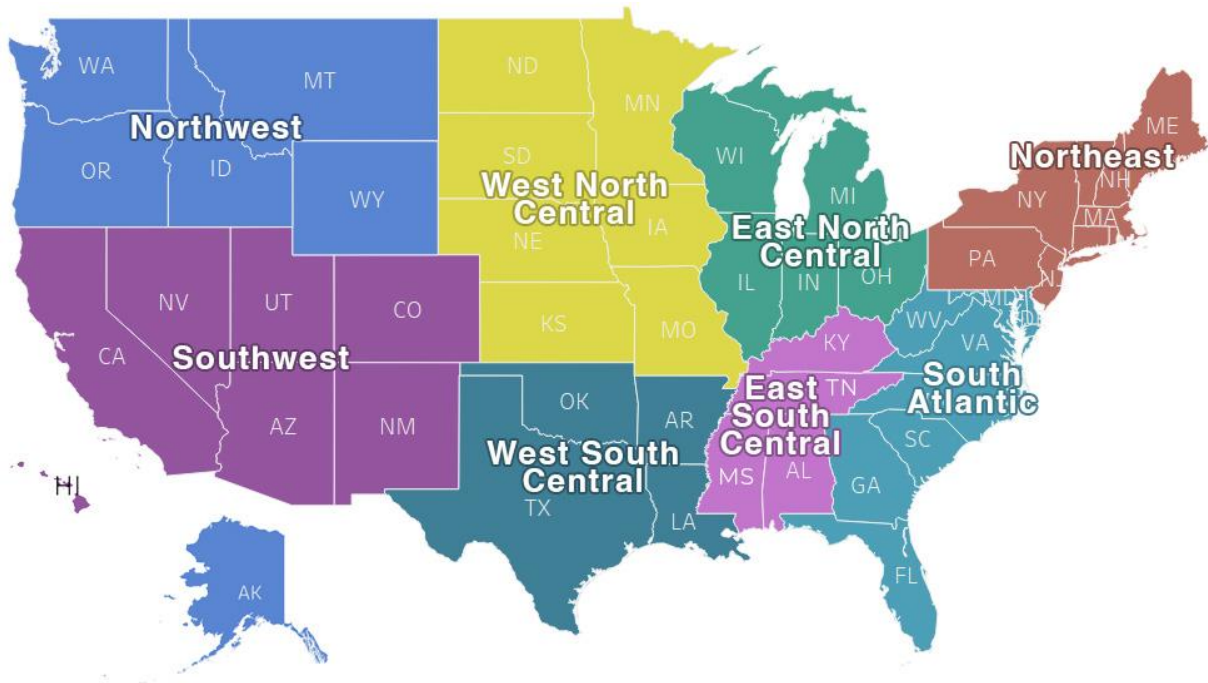
An evaluation of indicative costs across US metros shows that for this food manufacturing project, labor costs are expected to comprise 57 percent of all location-dependent costs, excluding logistics.

By comparison, utilities cumulatively contribute 19 percent of annual operating costs, followed by lease costs at 13 percent and taxes at 11 percent of the location-dependent operating costs evaluated. Except for logistics costs, which could drastically impact the operating costs for a food manufacturing operation, labor costs are expected to be the largest of the location-dependent expenses.

Optimal locations are those that offer an above-average quality score at a lower-than-average operating cost. The comparison of cost and quality metrics illuminates the strengths, weaknesses, opportunities, and threats for each metro, and allows corporations to make informed decisions about potential tradeoffs when choosing their location. Focusing on the highest potential metros based on these rankings allows site selection efforts to be focused only on the regions that will be the most optimal for their unique project.

+ Regions

For benchmarking purposes, the US has been divided into eight regions based on their geographic localization and shared socio-economic characteristics. It is understood that metros within each region may vary drastically, but they share a proximity to serve common markets, sit in similar time zones, and share some commonalities in both business costs and climate. In addition to the nationwide GLS Insights report, regional reports reveal localized strengths and weaknesses and are useful to identify the best metros for Food Manufacturing location decisions that are driven by regional supply chains.

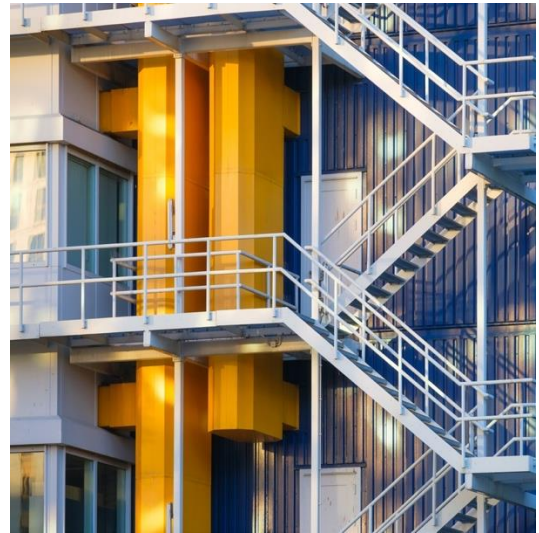


Region	States	Metro Count ¹³
Northwest	Alaska, Idaho, Montana, Oregon, Washington, Wyoming	35
Southwest	Arizona, California, Colorado, Hawaii, Nevada, New Mexico, Utah	53
West North Central	Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota	35
West South Central	Arkansas, Louisiana, Oklahoma, Texas	46
East North Central	Illinois, Indiana, Michigan, Ohio, Wisconsin	70
East South Central	Alabama, Kentucky, Mississippi, Tennessee	34
South Atlantic	Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia	84
Northeast	Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont	49

+ Project Profile

Every project is unique, even those within the same industry sector, and it is important to base location decisions on project-specific quality and cost considerations. However, many projects, especially those in the same sector, share common drivers.

For the purposes of this ranking analysis, GLS developed a food manufacturing project profile based on 60 years of industry experience and the commonalities of recently announced food manufacturing projects. The location-dependent operating costs and quality scoring matrix for this analysis have been based on this profile.



The chart below reflects the project-specific analysis inputs. The operation is assumed to run seven days a week with two eight-hour shifts per day. In addition to the total number of employees, a labor profile has been developed that includes a mix of industry-specific white- and blue-collar occupations to measure labor quality, availability, and cost.

This analysis is designed to allow for a customization of inputs, which would result in a modified ranking according to the unique needs of a specific project.

Food Manufacturing

REAL ESTATE	250K SF Building	30 Acres		
INITIAL INVESTMENT + EMPLOYMENT	\$100MM Capital Investment	150 Employees		
FINANCIALS	\$250MM Revenue	7% Earnings Before Taxes		
UTILITY DEMANDS	5 MW Electric Load Factor 0.70	25 MCFPH Natural Gas	200K GPD Water	150K GPD Wastewater

Unlike large industrial and warehouse operations, most food manufacturers require a relatively small footprint of less than 500,000 square feet. Some operations require rail, but most food manufacturers primarily rely on truck transport of raw materials and finished goods.

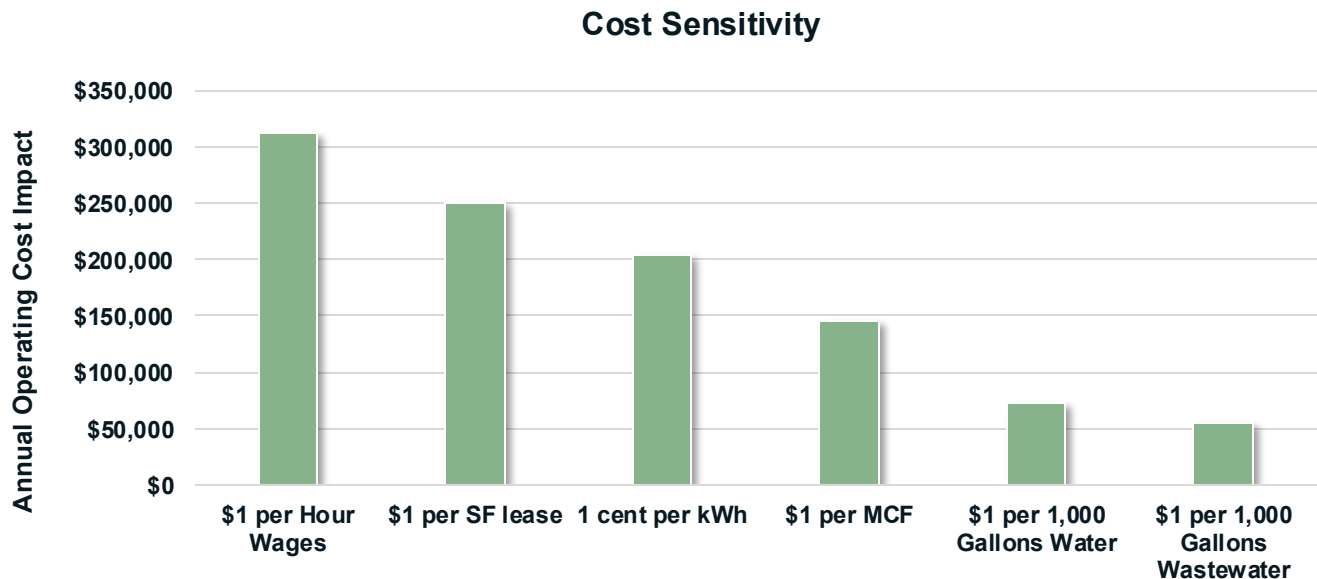
Electricity and natural gas requirements are typically low to moderate for food manufacturing, comparable to light or general manufacturing operations. Food operations with a baking process may require higher levels of natural gas. Water and wastewater requirements are typically greater for food manufacturing facilities than for general manufacturing operations, but the demand varies significantly by process.

Employment levels are typically moderate for food manufacturers, with most positions traditionally requiring a low level of skill. However, as food manufacturers become more automated, skill requirements have begun to mirror advanced manufacturing operations. A workforce that has experience in food manufacturing and the unique requirements related to food safety and cleanliness is highly desirable and sought after.

The most significant location-dependent cost drivers for food manufacturers are typically: proximity to raw materials and customers, labor costs, and utility costs.

Taxes, incentives, and lease costs may vary significantly from location to location and may differentiate the most competitive locations from one another.

Other project-specific considerations can include a requirement to locate away from airborne contamination and a sensitivity to any neighbors that may be concerned with the smells produced by some food manufacturing processes.



The chart above shows the additional cost per year if a location's labor or utility rates were to increase. Standard units for key cost drivers are used to gauge cost sensitivity; electricity sensitivity is measured in the difference of one cent per kWh, while other cost factors are assessed in one-dollar increments.

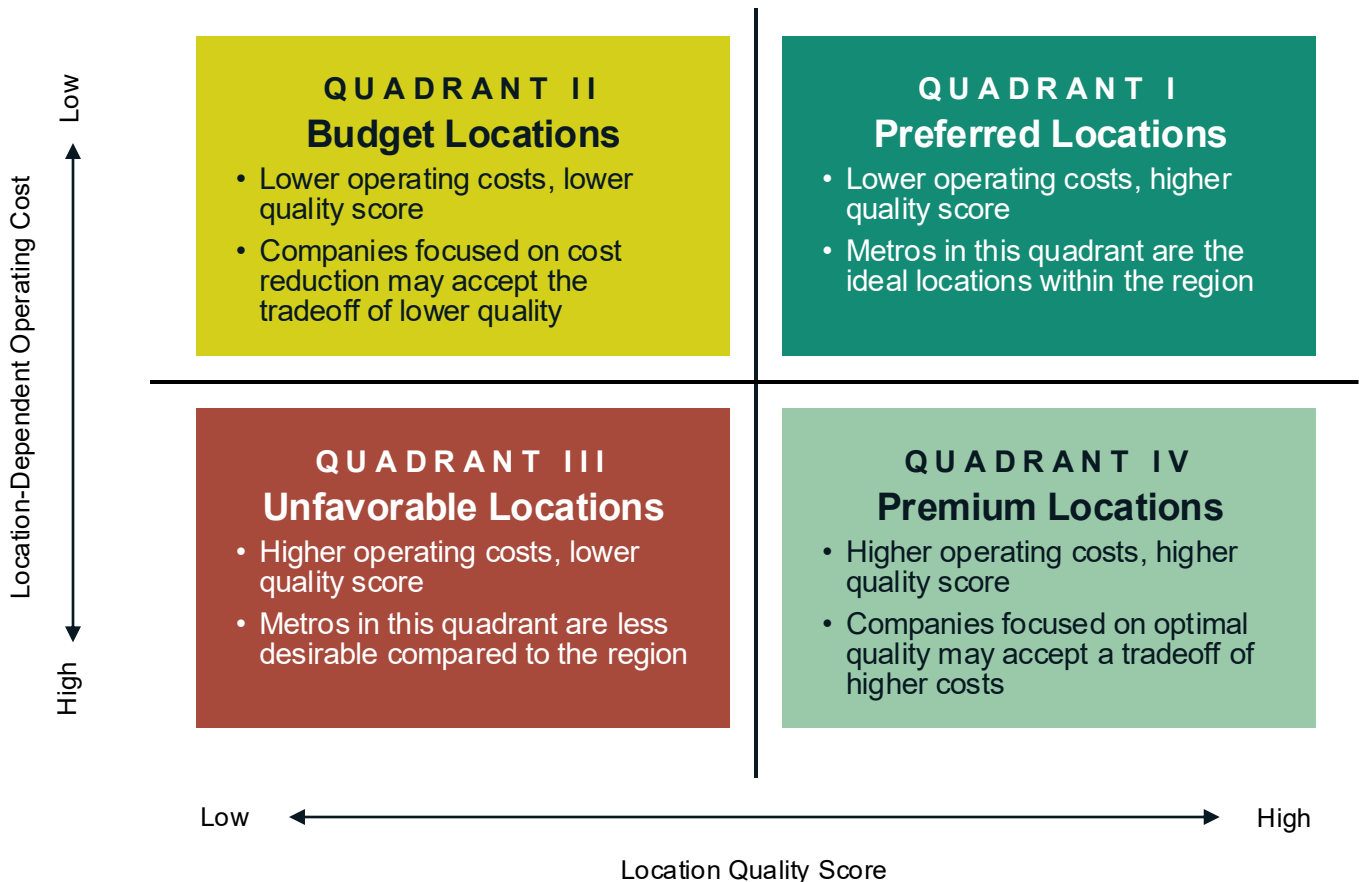
For this representative food manufacturing project, wages are the most sensitive operating cost, excluding logistics and taxes. The risk of labor cost escalation is likely to be among this project's greatest operating cost concerns.

+ Optimizing Cost and Quality

In the GLS Insights' composite model, each metro is assigned a position on the chart based on its location quality score and location-dependent operating cost. A location's position will change depending on the project specifications and the competing locations in consideration.

Locations falling within the top right quadrant (Quadrant I in the chart below) are considered preferred as they provide an optimal balance of a high location quality score and a competitive location-dependent operating cost within a specified region. On the other hand, metros that fall within the bottom left quadrant (Quadrant III) have relatively lower quality scores and higher operating costs, making them unfavorable locations and likely for elimination unless project-specific critical factors, such as the presence of a key supplier or customer, exist. Locations in the bottom right quadrant (Quadrant IV) have above-average location quality scores but also above-average location-dependent operating costs. The upper left quadrant (Quadrant II) includes locations with a location-dependent operating cost below the average but also a location quality score below the average. Lower costs often cannot make up for a lack of quality and therefore these locations should be considered cautiously.

The top-ranking metros fall within Quadrant I – Preferred Locations and Quadrant IV – Premium Locations. Premium Locations may be considered despite their higher costs, particularly if incentives can be leveraged to offset these cost implications or if the long-term benefits of higher quality attributes are weighed (for example, reduced turnover).



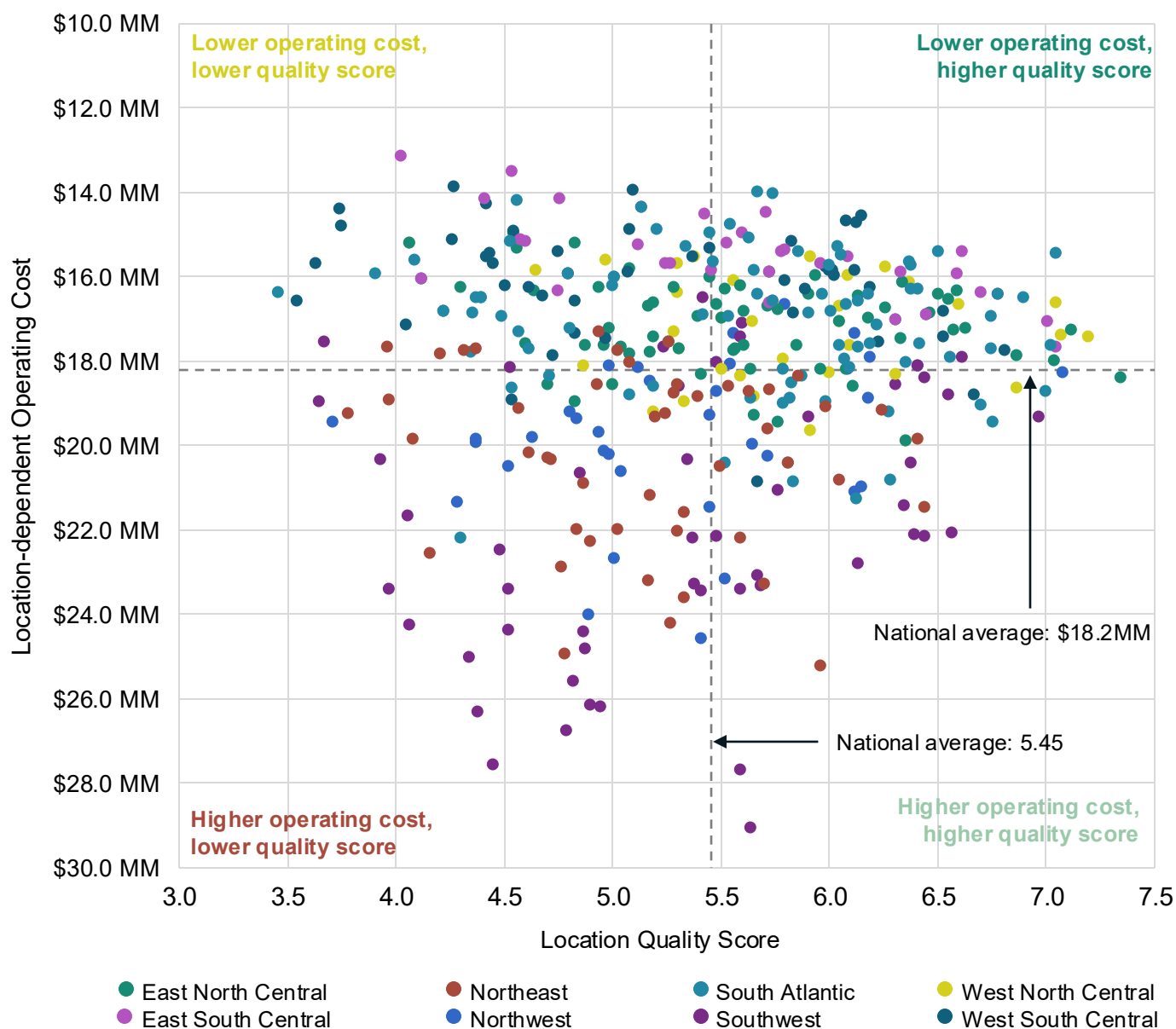
food manufacturing

BEST OF THE U.S.

+ Top Regions

The composite chart below shows the distribution of all metro areas based on location quality score and location-dependent operating cost. Ranges for location quality scores show that all regions provide both high- and low-quality locations; however, it is noticeable that metros in the Southwest, Northwest, and Northeast regions are generally associated with higher operating costs.

Quality Score vs Location-Dependent Operating Cost

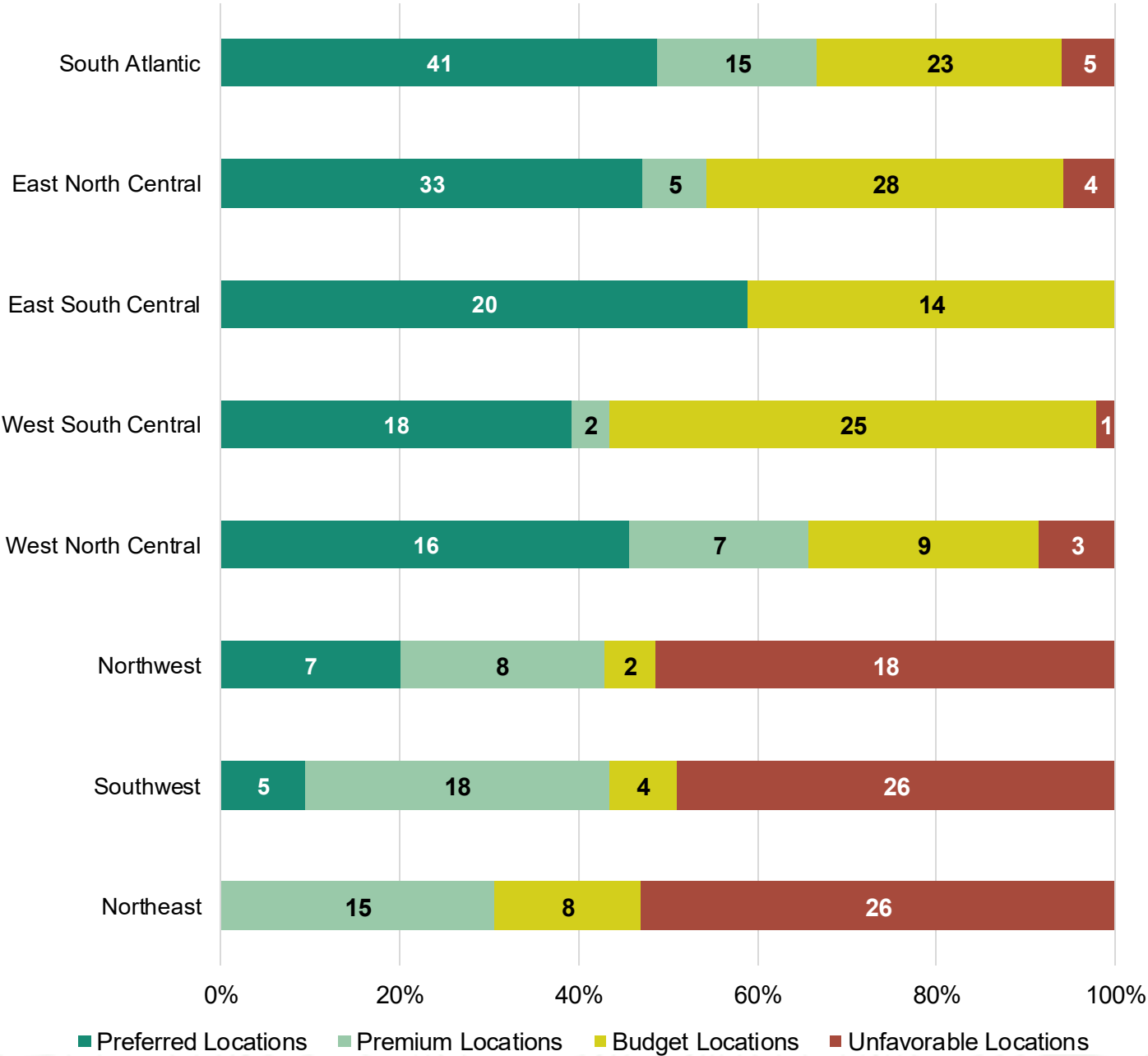


The chart below provides a snapshot of each region's metros divided into each of the four composite chart quadrants. Metros providing location quality scores above the national average and location-dependent operating costs below the national average offer the optimal balance between these two components.

Each region offers a select number of high-quality opportunities for food manufacturing projects; however, in the Northeast region, all the higher-quality locations come at higher location-dependent operating cost.

It is rare that a food manufacturing project would begin their location search by considering the entire United States; project-specific requirements such as proximity to crucial suppliers and cost sensitivity are often decisive factors in narrowing the search to fewer regions.

Composite Chart Metros Distribution by Region



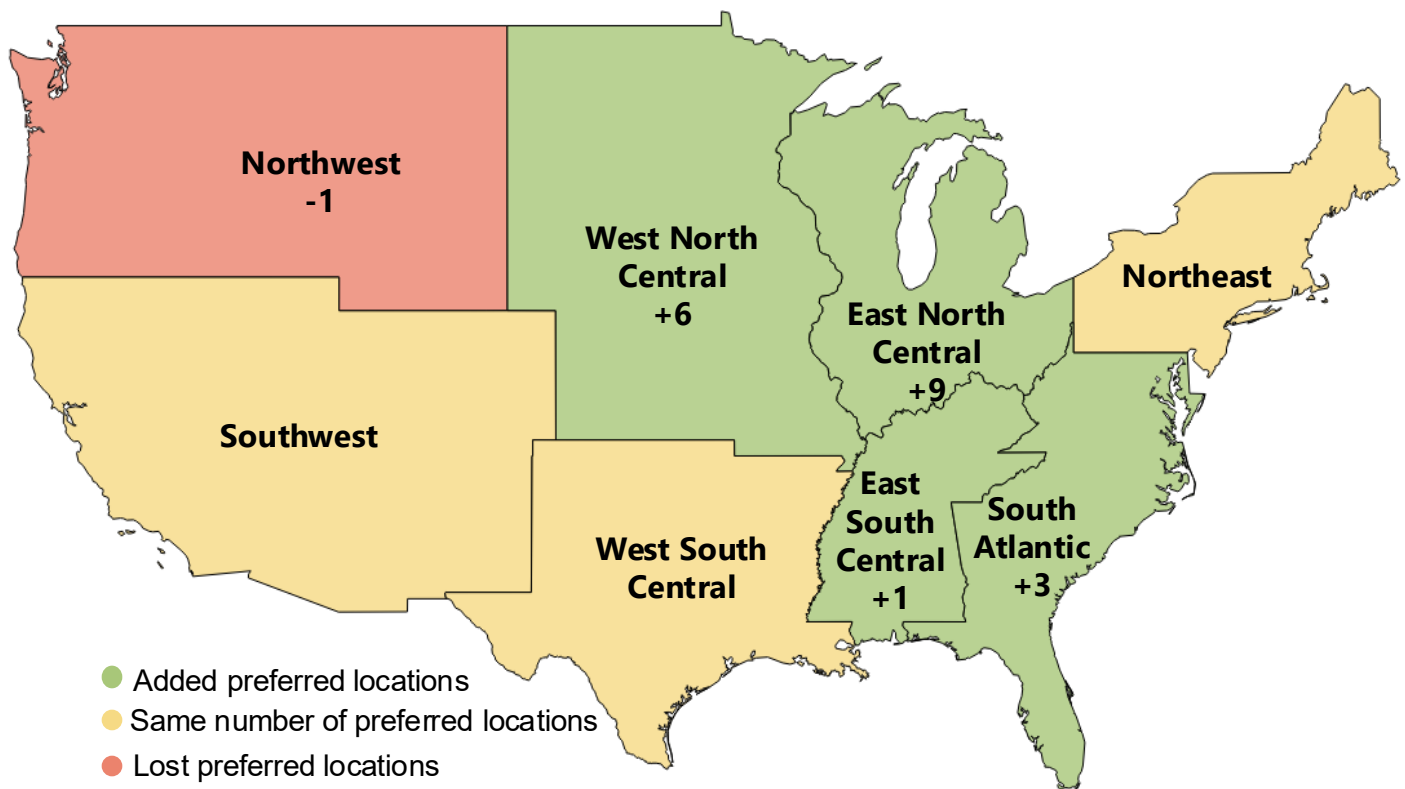
+ Regional Changes Between the Reports

Compared to the previous Best Places for Food Manufacturing report, the East North Central and West North Central regions have seen the most notable increase in the number of MSAs falling into the preferred quadrant, offering the optimal blend of location quality and operating cost. East North Central added eight more locations, while West North Central added six. Both regions benefited from favorable regulatory changes, leading to slight improvements in tax scores and more significant gains in the Freedom Score from CATO. Additionally, East North Central MSAs, on average, noted a slight improvement in the Attraction and Quality of Life categories, while West North Central also scored relatively better in demographic conditions compared to the nation.

The South Atlantic has further reinforced its strong position by adding three more MSAs to the preferred list, maintaining the highest number of preferred locations. On average, South Atlantic MSAs benchmarked stronger in Attraction and Quality of Life, Demographics, and Industry Ecosystem compared to the nation. Meanwhile, West South Central and East South Central have seen minimal changes in their MSA distributions. East South Central still has the highest percentage of preferred locations relative to its total number of MSAs.

While the Northwest was the only region to lose a preferred location, the Northeast, Northwest, and Southwest saw more MSAs shift into the unfavorable quadrant from other quadrants, driven by declining scores in demographic categories.

Map showing changes in preferred locations by region between the previous and current reports.



+ Top MSAs

Several MSAs demonstrated consistency and strong performance, maintaining **their top 10 rankings** across both our original report and the current release:

- Previous report leaders Savannah, GA and Huntsville, AL each dropped by one spot, as Warner Robins, GA surged from 12th in the previous report to the top of the list.
- Atlanta–Sandy Springs–Roswell, GA and Knoxville, TN MSAs maintained their strong positions, holding steady at 7th and 9th place, respectively.
- Winston-Salem, NC, climbed from 10th to 4th maintaining its spot among the top 10 metros.

Beyond Warner Robins, GA, **new entrants to the Top 10** in 2025 include Clarksville, TN-KY; Kansas City, MO-KS; Chattanooga, TN-GA; and Gainesville, GA. Chattanooga, TN made the largest jump, up 18 positions, due to improvements in educational attainment, attraction and quality of life, and industry chain and competitiveness metrics. Clarksville, TN-KY experienced the second most significant increase among the top 10, rising 14 positions, driven by relatively strong growth in the manufacturing workforce, especially notable given the MSA's size, and improved performance in the target industry occupation metrics.

Overall, the top-ranked MSAs reflect a geographic concentration in the **East South Central and South Atlantic** regions—areas that continue to offer an attractive balance of cost and quality.

Top MSA Spotlight - Warner Robins, GA

Warner Robins surged from 12th place in the previous report to claim the top spot this year, driven by significant improvements across key quality categories. The MSA's strong performance was fueled by notable gains in demographics, workforce, and industry competitiveness. Factors contributing to this rise include healthy labor force growth, higher labor force participation rates, and a surge in employment within the manufacturing and food industries. Additionally, Warner Robins demonstrated increased competitiveness in both manufacturing and food manufacturing sectors, along with stronger supply chain scores on the buyer side, further solidifying its position as a top-performing metro.

Warner Robins, GA, has a strong food manufacturing presence, with a food manufacturing location quotient of 5.08, employment of over 4,500, and an employment increase of 14% over the last five years and 8.7% in the past year alone. This growth is driven by two specific industry groups: Animal Slaughtering and Processing and Snack Food Manufacturing. Both industries experienced notable employment growth in the past year, at 8.1% and 7.8%, respectively. Together, these industries account for the vast majority of employment in the food manufacturing sector. The most recent growth in these industries has been driven by Frito-Lay and Jack Link's Beef Jerky, which announced projects in 2020 and 2022, resulting in nearly 1,000 new jobs and a \$650 million investment.

food manufacturing

BEST OF THE REGION: EAST NORTH CENTRAL



TOP PERFORMING
Green Bay, WI



HIGHEST QUALITY
Indianapolis-Carmel-
Greenwood, IN



LOWEST COST
Mansfield, OH

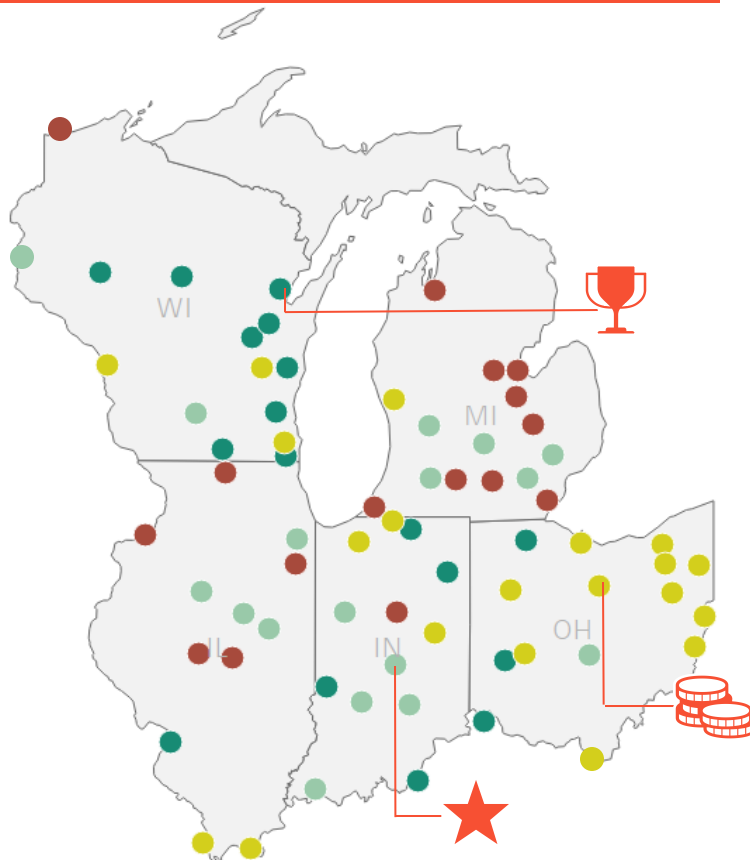
East North Central

Illinois, Indiana, Michigan, Ohio, and Wisconsin

The East North Central region, which includes 70 metros spanning from Wisconsin through Ohio, is one of the most attractive destinations in the nation for Food Manufacturing. None of the top ten metros in the United States are within this region, but five of the top 30 highest-ranking metros in the United States are located within this region.

Between 2023 and 2024, the East North Central region attracted a quarter of all Food Manufacturing projects, solidifying its position as the nation's top hub for the sector, driven by strong activity in the Fruits & Vegetables & Specialist food, and Animal Food subsectors.

The map to the right reveals how all East North Central metros rank in the quality and cost analyses relative to the region.



Regional Quadrants

- Higher Quality, Lower Cost (Dark Green)
- Lower Quality, Lower Cost (Yellow)
- Higher Quality, Higher Cost (Light Green)
- Lower Quality, Higher Cost (Red)

2025 Regional Ranking	Metro	2025 Score	2024 Regional Ranking	Δ Regional Ranking	2025 National Ranking
1	Green Bay, WI	85.70	4	+3	11
2	Lafayette-West Lafayette, IN	85.10	6	+4	14
3	Wausau, WI*	83.70	12	+9	20
4	Fort Wayne, IN	83.37	1	-3	T21
5	Kenosha, WI	82.13	— *	— *	29

*Due to the changes in delineation, as detailed in End Notes Section #5, the MSA previously named Wausau-Weston, WI (consisting of Lincoln County and Marathon County) has been renamed to Wausau, WI (Marathon County). Kenosha, WI (Kenosha County) has been designated as a new MSA, having previously been part of the Chicago-Naperville-Elgin, IL-IN-WI MSA.

food manufacturing

BEST OF THE REGION: EAST SOUTH CENTRAL



TOP PERFORMING
Huntsville, AL



HIGHEST QUALITY
Nashville-Davidson--
Murfreesboro--
Franklin, TN



LOWEST COST
Gadsden, AL

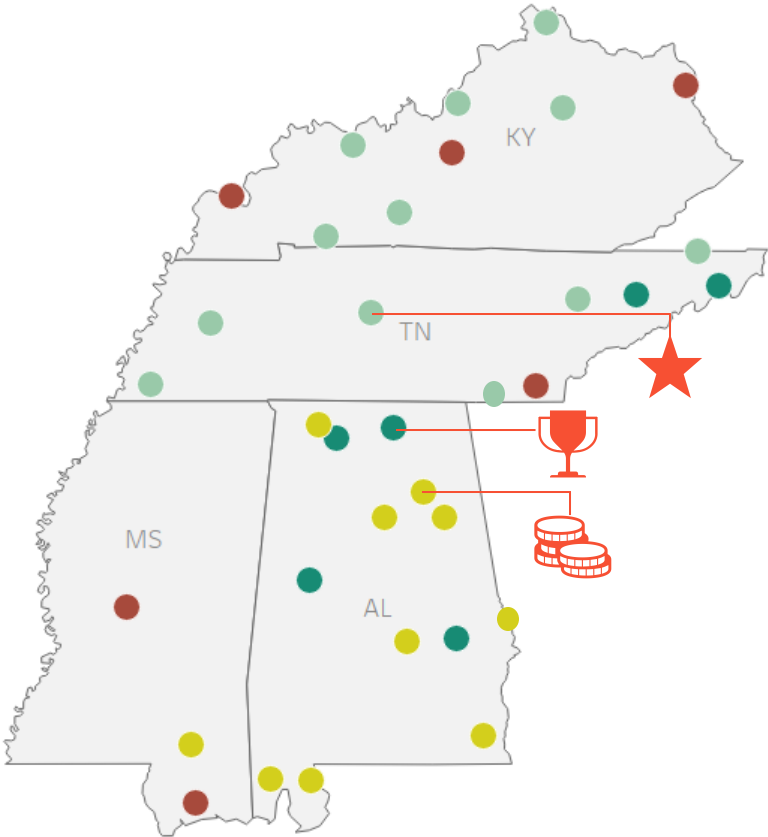
East South Central

Alabama, Kentucky, Mississippi, and Tennessee.

The East South Central region, which includes 34 metros spanning from Kentucky through Mississippi, is one of the most attractive destinations in the nation for Food Manufacturing. Four of the top 10 and nine of the top 50 highest-ranking metros in the United States are located within this region.

Between 2023 and 2024, the East South Central region accounted for 10% of all Food Manufacturing projects nationwide, driven by strong activity in the Fruits & Vegetables & Specialist food industry.

The map to the right reveals how all East South Central metros rank in the quality and cost analyses relative to the region.



Regional Quadrants

- Higher Quality, Lower Cost
- Lower Quality, Lower Cost
- Higher Quality, Higher Cost
- Lower Quality, Higher Cost

2025 Regional Ranking	Metro	2025 Score	2024 Regional Ranking	Δ Regional Ranking	2025 National Ranking
1	Huntsville, AL	91.53	1	-	3
2	Clarksville, TN-KY	87.97	5	+3	5
3	Chattanooga, TN-GA	86.93	7	+4	8
4	Knoxville, TN	86.67	4	-	9
5	Lexington-Fayette, KY	84.40	3	-2	16

food manufacturing

BEST OF THE REGION: NORTHEAST



TOP PERFORMING
Allentown-
Bethlehem-Easton,
PA-NJ



HIGHEST QUALITY
Portland-South
Portland, ME



LOWEST COST
Altoona, PA

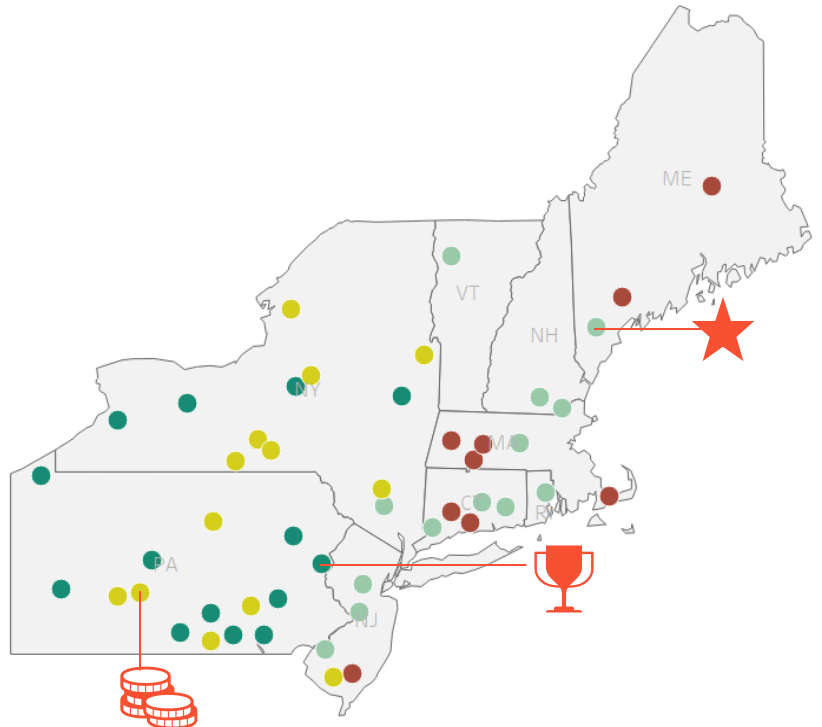
Northeast

Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont.

The Northeast region, which includes 49 metros spanning from Maine through New Jersey, may not be the most attractive destination in the nation for Food Manufacturing. None of the top 100 highest-ranking metros in the United States are located within this region.

Between 2023 and 2024, the Northeast region accounted for less than 7% of Food Manufacturing projects nationwide, with notable activity in the Dairy Products subsector.

The map to the right reveals how all Northeast metros rank in the quality and cost analyses relative to the region.



Regional Quadrants

- Lower Quality, Lower Cost
- Higher Quality, Lower Cost
- Lower Quality, Higher Cost
- Higher Quality, Higher Cost

2025 Regional Ranking	Metro	2025 Score	2024 Regional Ranking	Δ Regional Ranking	2025 National Ranking
1	Allentown-Bethlehem-Easton, PA-NJ	65.57	1	-	109
2	Harrisburg-Carlisle, PA	63.73	3	+1	119
3	Portland-South Portland, ME	63.37	5	+2	T124
4	Scranton--Wilkes-Barre, PA	57.30	11	+7	153
5	Lancaster, PA	56.33	4	-1	160

food manufacturing

BEST OF THE REGION: NORTHWEST



TOP PERFORMING
Boise City, ID



HIGHEST QUALITY
Boise City, ID



LOWEST COST
Pocatello, ID

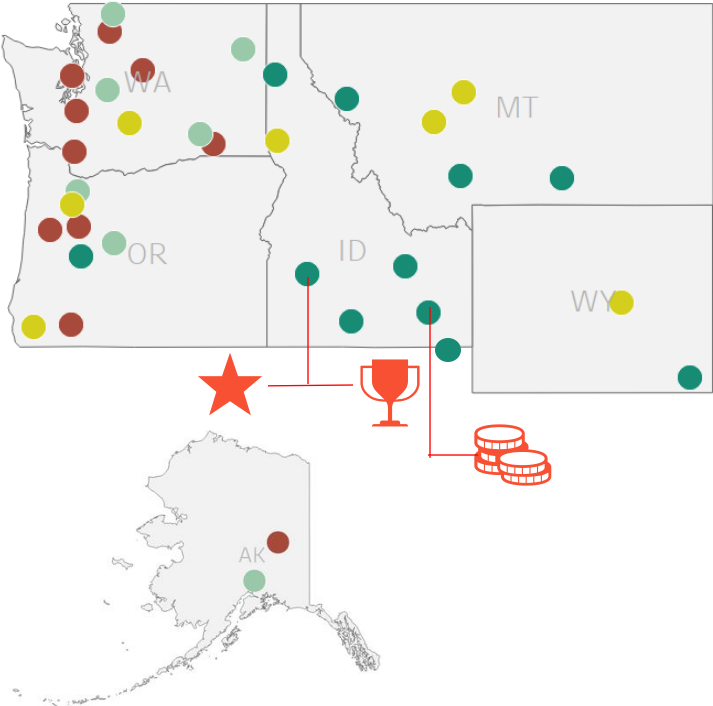
Northwest

Alaska, Idaho, Montana, Oregon, Washington, and Wyoming

The Northwest region, which includes 35 metros spanning from Washington through Wyoming then Alaska may not be the most attractive destination in the nation for Food Manufacturing. None of the metros in this region rank within the top 40, and only four are listed in the top 100 highest-ranking metros in the United States.

Between 2023 and 2024, the Northwest region accounted for less than 3% of all Food Manufacturing projects nationwide, with limited activity across Animal Food, and Fruits & Vegetables & Specialist food subsectors.

The map to the right reveals how all Northwest metros rank in the quality and costs analyses relative to the region.



Regional Quadrants

- Higher Quality, Lower Cost
- Lower Quality, Lower Cost
- Higher Quality, Higher Cost
- Lower Quality, Higher Cost

2025 Regional Ranking	Metro	2025 Score	2024 Regional Ranking	Δ Regional Ranking	2025 National Ranking
1	Boise City, ID	78.70	1	-	46
2	Logan, UT-ID	72.23	3	+1	T79
3	Idaho Falls, ID	70.23	4	+1	91
4	Twin Falls, ID	68.57	2	-2	99
5	Pocatello, ID	65.30	7	+2	110

food manufacturing

BEST OF THE REGION: SOUTH ATLANTIC



TOP PERFORMING
Warner Robins,
GA



HIGHEST QUALITY
Savannah, GA



LOWEST COST
Dalton, GA

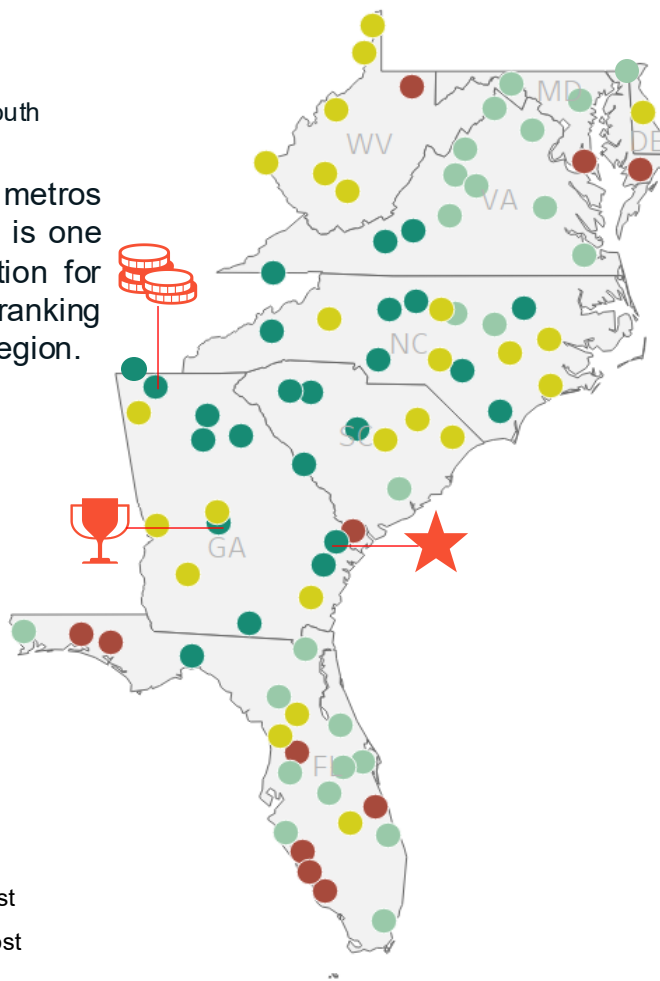
South Atlantic

Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, and West Virginia

The South Atlantic region, which includes 84 metros spanning from West Virginia through Georgia, is one of the most attractive destinations in the nation for Food Manufacturing. Six of the top ten highest-ranking metros in the United States are located in this region.

Between 2023 and 2024, the South Atlantic region accounted for roughly 19% of all Food Manufacturing projects nationwide, emerging as the second-largest top hub for the sector, with strong activity in the Dairy Products and Coffee and Tea subsectors.

The map to the right reveals how all South Atlantic metros rank in the quality and costs analyses relative to the region.



Regional Quadrants

- Higher Quality, Lower Cost
- Lower Quality, Lower Cost
- Higher Quality, Higher Cost
- Lower Quality, Higher Cost

2025 Regional Ranking	Metro	2025 Score	2024 Regional Ranking	Δ Regional Ranking	2025 National Ranking
1	Warner Robins, GA	94.70	T7	+6	1
2	Savannah, GA	91.97	1	-1	2
3	Winston-Salem, NC	89.47	6	+3	4
4	Atlanta-Sandy Springs-Roswell, GA*	87.07	5	+1	7
5	Chattanooga, TN-GA	86.93	15	+10	8

*Due to changes in delineation (i.e., the composition of counties), as detailed in End Notes Section #5, the MSA previously named Atlanta-Sandy Springs-Alpharetta, GA has been renamed to Atlanta-Sandy Springs-Roswell, GA.

food manufacturing

BEST OF THE REGION: SOUTHWEST



TOP PERFORMING
Ogden, UT



HIGHEST QUALITY
Phoenix-Mesa-
Chandler, AZ



LOWEST COST
Las Cruces, NM

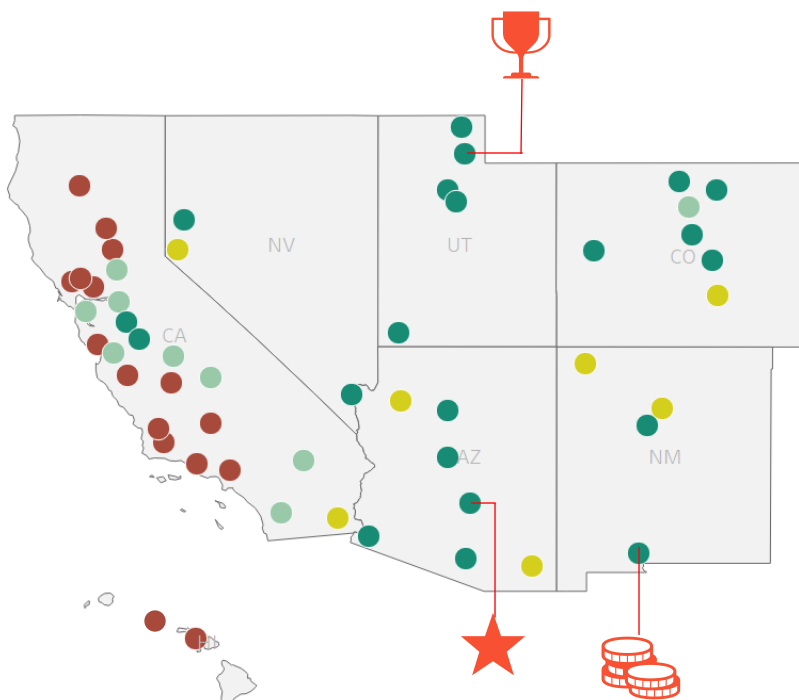
Southwest

Arizona, California, Colorado, Hawaii, Nevada, New Mexico, and Utah

The Southwest region, which includes 53 metros spanning from Utah through Hawaii, may not be the most attractive destination in the nation for Food Manufacturing. None of the top ten and only five of the top 100 highest-ranking metros in the United States are located in this region.

Between 2023 and 2024, the Southwest region accounted for roughly 9% of all Food Manufacturing projects nationwide, with notable activity in the Bakeries & tortillas subsector.

The map to the right reveals how all Southwest metros rank in the quality and costs analyses relative to the region.



Regional Quadrants

- Higher Quality, Lower Cost
- Lower Quality, Lower Cost
- Higher Quality, Higher Cost
- Lower Quality, Higher Cost

2025 Regional Ranking	Metro	2025 Score	2024 Regional Ranking	Δ Regional Ranking	2025 National Ranking
1	Ogden, UT*	76.90	1	-	51
2	Phoenix-Mesa-Chandler, AZ	72.50	5	+3	77
3	Logan, UT-ID	72.23	2	-1	T79
4	Provo-Orem-Lehi, UT*	71.23	3	-1	84
5	Salt Lake City-Murray, UT*	70.87	4	-1	T89

*Due to changes in delineation (i.e., the composition of counties), as detailed in End Notes Section #5, the MSA previously named Ogden-Clearfield, UT has been renamed to Ogden, UT; Provo-Orem, UT to Provo-Orem-Lehi, UT; and Salt Lake City, UT to Salt Lake City-Murray, UT.

food manufacturing

BEST OF THE REGION: WEST NORTH CENTRAL



TOP PERFORMING
Kansas City, MO-KS



HIGHEST QUALITY
Fargo, ND-MN



LOWEST COST
Cape Girardeau, MO-IL

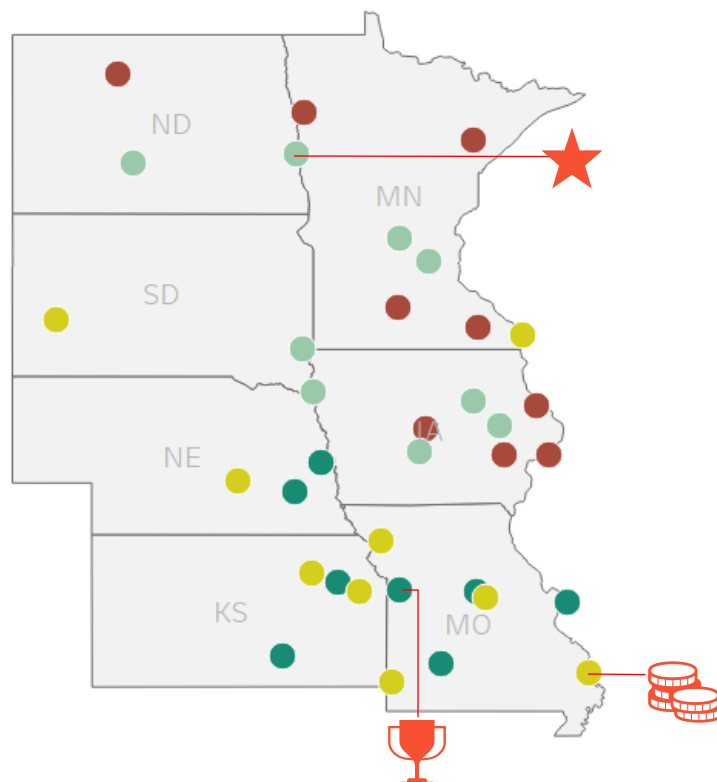
West North Central

Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, and South Dakota

The West North Central region, which includes 35 metros spanning from North Dakota through Missouri, is one of the most attractive destinations in the nation for Food Manufacturing. Four of the top 20 highest-ranking metros in the United States are located within this region

Between 2023 and 2024, the West North Central region accounted for roughly 18% of all Food Manufacturing projects nationwide, with strong activity in the Animal Food, Grains & oilseed, and Bakeries & tortillas subsectors.

The map to the right reveals how all West North Central metros rank in the quality and costs analyses relative to the region.



Regional Quadrants

- Higher Quality, Lower Cost
- Higher Quality, Higher Cost
- Lower Quality, Lower Cost
- Lower Quality, Higher Cost

2025 Regional Ranking	Metro	2025 Score	2024 Regional Ranking	Δ Regional Ranking	2025 National Ranking
1	Kansas City, MO-KS	87.73	1	-	6
2	Fargo, ND-MN	84.47	5	+3	15
3	Sioux Falls, SD-MN*	84.10	2	-1	18
4	Omaha, NE-IA*	83.90	3	-1	19
T5	Springfield, MO	82.97	6	+1	T25
T5	Wichita, KS	82.97	4	-1	T25

*Due to changes in delineation (i.e., the composition of counties), as detailed in End Notes Section #5, the MSA previously named Sioux Falls, SD has been renamed to Sioux Falls, SD-MN, and Omaha-Council Bluffs, NE-IA to Omaha, NE-IA.

food manufacturing

BEST OF THE REGION: WEST SOUTH CENTRAL



TOP PERFORMING
Oklahoma City, OK



HIGHEST QUALITY
Dallas-Fort Worth-
Arlington, TX



LOWEST COST
Monroe, LA

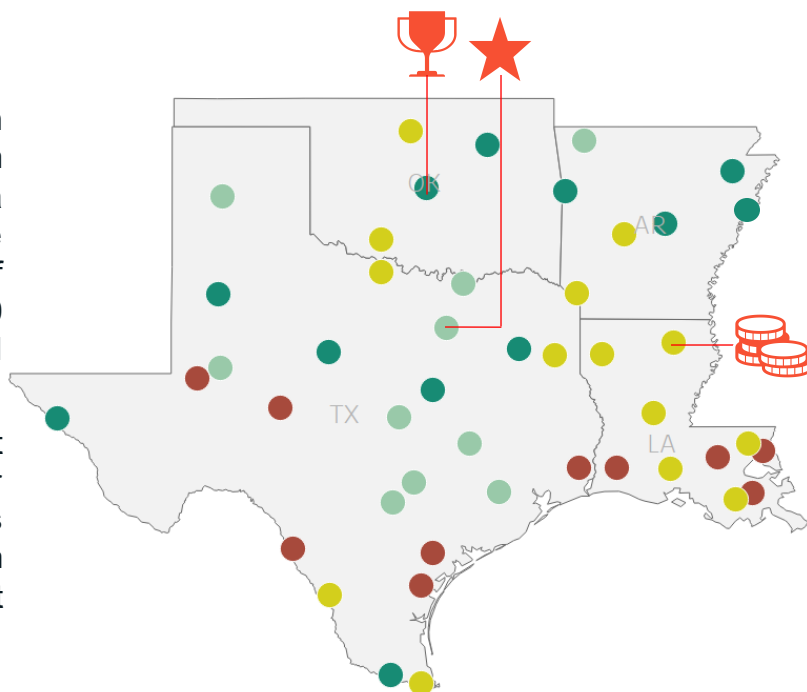
West South Central

Arkansas, Louisiana, Oklahoma, and Texas

The West South Central region, which includes 46 metros spanning from Oklahoma through Louisiana, is a somewhat attractive destination in the nation for Food Manufacturing. None of the top ten but eight of the top 50 highest-ranking metros in the United States are located in this region.

Between 2023 and 2024, the West South Central region accounted for 11% of all Food Manufacturing projects nationwide, driven by strong activity in the Fruits & Vegetables & Specialist food and Grains & oilseed subsector.

The map to the right reveals how all West South Central metros rank in the quality and costs analyses relative to the region.

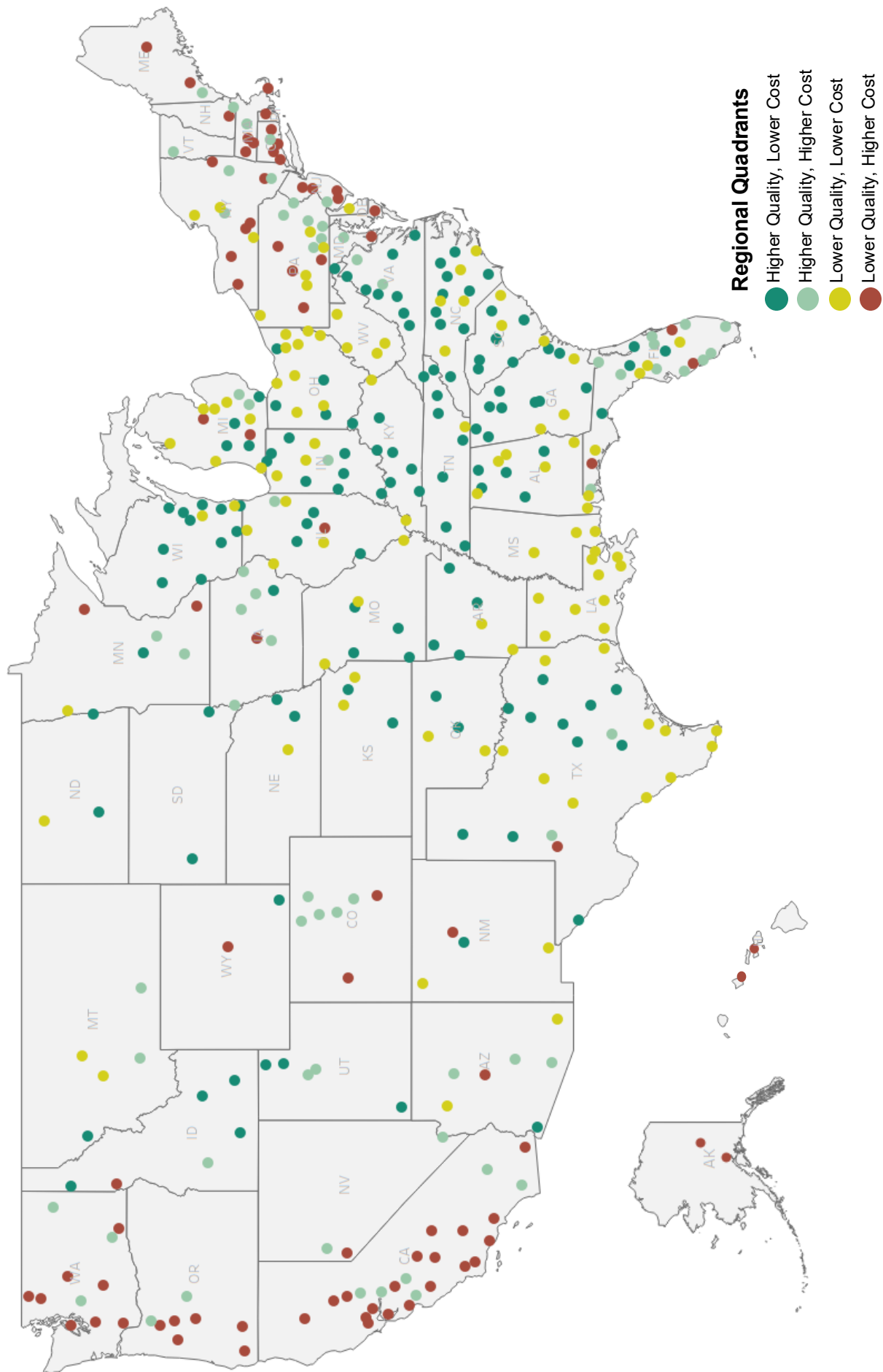


Regional Quadrants

- Teal dot: Higher Quality, Lower Cost
- Light green dot: Higher Quality, Higher Cost
- Yellow dot: Lower Quality, Lower Cost
- Red dot: Lower Quality, Higher Cost

2025 Regional Ranking	Metro	2025 Score	2024 Regional Ranking	Δ Regional Ranking	2025 National Ranking
1	Oklahoma City, OK	85.23	4	+3	13
2	Fort Smith, AR-OK	84.20	19	+17	17
3	Tulsa, OK	82.23	6	+3	28
4	Fayetteville-Springdale-Rogers, AR	81.50	1	-3	T32
5	Amarillo, TX	79.33	7	+2	39

+ Composite Model National Quadrant Map



food manufacturing

TOP PERFORMING PLACES RANKING

+ Important Considerations

It is important to note that since we published our first *Best Places for Food Manufacturing* report in 2023, there has been a change in official MSA delineations. In July 2023, the U.S. Office of Management and Budget (OMB) released updated delineations for Metropolitan Statistical Areas (MSAs), Micropolitan Statistical Areas (μSAs), and Combined Statistical Areas (CSAs). These updates led to several significant changes including boundary adjustments, reclassification of areas, and name changes:

- Some areas previously classified as MSAs were reclassified as μSAs or lost their Core-Based Statistical Area (CBSA) status entirely due to population declines or changes in commuting patterns. For example, Bloomsburg-Berwick, PA was reclassified as μSAs.
- Conversely, certain μSAs were elevated to MSAs, and new CBSAs were designated based on growth and increased integration. For example, Bozeman, MT and Eagle Pass, TX were elevated to MSAs.
- The composition of several CBSAs changed, with counties being added or removed to better reflect current demographic and economic ties. For example, Franklin County, AR was removed from Fort Smith, AR-OK MSA, and Haywood County, NC was removed from the Asheville, NC MSA. In addition to changes in county composition, 27 MSAs also underwent name changes. For instance, Atlanta–Sandy Springs–Alpharetta, GA was renamed Atlanta–Sandy Springs–Roswell, GA to better reflect changes in the counties that comprise the area.

Due to these changes, our rankings have been impacted, with some MSAs experiencing more drastic shifts than anticipated from the previous report due to changes in their composition. Additionally, the addition or removal of certain MSAs has amplified ranking shifts, making some changes more pronounced than they would have been without the delineation updates. For MSAs that were newly added or underwent major compositional changes, comparative rankings are not provided. However, for others—such as Fort Smith—while the name remains the same, the shift is still impacted by the removal of counties.

Top Performing Places for Food Manufacturing

2025 National Ranking	Metro	2025 Score	Quadrant	2024 National Ranking	2024 Score	ΔScore	Δ Rank
1	Warner Robins, GA	94.70	●	12	85.00	9.7	+11
2	Savannah, GA	91.97	●	1	92.03	-0.1	-1
3	Huntsville, AL	91.53	●	2	90.10	1.4	-1
4	Winston-Salem, NC	89.47	●	10	85.77	3.7	+6
5	Clarksville, TN-KY	87.97	●	19	83.17	4.8	+14
6	Kansas City, MO-KS	87.73	●	11	85.47	2.3	+5
7	Atlanta-Sandy Springs-Roswell, GA	87.07	●	7	87.37	-0.3	-
8	Chattanooga, TN-GA	86.93	●	26	81.73	5.2	+18
9	Knoxville, TN	86.67	●	9	86.20	0.5	-
10	Gainesville, GA	85.90	●	14	84.90	1.0	+4
11	Green Bay, WI	85.70	●	28	81.27	4.4	+17
12	Augusta-Richmond County, GA-SC	85.53	●	21	83.10	2.4	+9
13	Oklahoma City, OK	85.23	●	51	77.33	7.9	+38
14	Lafayette-West Lafayette, IN	85.10	●	31	80.83	4.3	+17
15	Fargo, ND-MN	84.47	●	49	77.87	6.6	+34
16	Lexington-Fayette, KY	84.40	●	8	86.53	-2.1	-8
17	Fort Smith, AR-OK	84.20	●	142	57.97	26.2	+125
18	Sioux Falls, SD-MN	84.10	●	-	-	-	-
19	Omaha, NE-IA	83.90	●	-	-	-	-
20	Wausau, WI	83.70	●	-	-	-	-
T21	Charlotte-Concord-Gastonia, NC-SC	83.37	●	6	88.20	-4.8	-15
T21	Fort Wayne, IN	83.37	●	17	84.23	-0.9	-4
23	Bowling Green, KY	83.20	●	3	89.03	-5.8	-20
24	Greenville-Anderson-Greer, SC	83.17	●	-	-	-	-
T25	Springfield, MO	82.97	●	56	75.83	7.1	+31

2025 National Ranking	Metro	2025 Score	Quadrant	2024 National Ranking	2024 Score	ΔScore	Δ Rank
T25	Wichita, KS	82.97	●	45	78.37	4.6	+20
27	Spartanburg, SC	82.33	●	5	88.27	-5.9	-22
28	Tulsa, OK	82.23	●	54	76.50	5.7	+26
29	Kenosha, WI	82.13	●	-	-	-	-
30	Raleigh-Cary, NC	81.93	●	20	83.13	-1.2	-10
31	Nashville-Davidson-- Murfreesboro--Franklin, TN	81.70	●	22	82.97	-1.3	-9
T32	Madison, WI	81.50	●	59	74.87	6.6	+27
T32	Fayetteville-Springdale-Rogers, AR	81.50	●	23	82.90	-1.4	-9
34	Eau Claire, WI	80.70	●	65	74.20	6.5	+31
35	Evansville, IN	80.33	●	-	-	-	-
36	Cincinnati, OH-KY-IN	80.17	●	50	77.50	2.7	+14
37	Morristown, TN	79.60	●	48	77.93	1.7	+11
38	Grand Rapids-Wyoming- Kentwood, MI	79.40	●	-	-	-	-
39	Amarillo, TX	79.33	●	66	73.83	5.5	+27
40	Dallas-Fort Worth-Arlington, TX	79.10	●	43	78.70	0.4	+3
41	Fayetteville, NC	79.07	●	T38	79.23	-0.2	-3
42	Little Rock-North Little Rock- Conway, AR	79.03	●	86	69.57	9.5	+44
43	Athens-Clarke County, GA	79.00	●	58	74.97	4.0	+15
44	Richmond, VA	78.90	●	24	82.83	-3.9	-20
45	Kalamazoo-Portage, MI	78.80	●	27	81.43	-2.6	-18
46	Boise City, ID	78.70	●	18	83.60	-4.9	-28
47	Indianapolis-Carmel- Greenwood, IN	78.53	●	-	-	-	-
48	San Antonio-New Braunfels, TX	78.43	●	83	70.63	7.8	35
49	Lincoln, NE	77.27	●	67	73.50	3.8	18
50	Columbia, SC	77.10	●	36	80.13	-3.0	-14

2025 National Ranking	Metro	2025 Score	Quadrant	2024 National Ranking	2024 Score	ΔScore	Δ Rank
51	Ogden, UT	76.90	●	-	-	-	-
52	Appleton, WI	76.57	●	68	73.47	3.1	+16
53	Charleston-North Charleston, SC	76.13	●	15	84.73	-8.6	-38
54	Janesville-Beloit, WI	75.77	●	53	76.83	-1.1	-1
55	Louisville/Jefferson County, KY-IN	75.67	●	41	79.07	-3.4	-14
T56	Durham-Chapel Hill, NC	75.60	●	T63	74.27	1.3	+7
T56	Greensboro-High Point, NC	75.60	●	4	88.30	-12.7	-52
58	Lubbock, TX	75.50	●	94	67.47	8.0	+36
59	Waco, TX	75.47	●	34	80.20	-4.7	-25
60	Jacksonville, FL	75.23	●	61	74.57	0.7	+1
61	Jonesboro, AR	75.10	●	52	76.90	-1.8	-9
62	Tyler, TX	75.07	●	84	69.67	5.4	+22
63	Asheville, NC	75.00	●	16	84.70	-9.7	-47
T64	El Paso, TX	74.90	●	73	72.87	2.0	+9
T64	Des Moines-West Des Moines, IA	74.90	●	71	73.27	1.6	+7
T64	Topeka, KS	74.90	●	93	67.77	7.1	+29
67	Jackson, TN	74.83	●	115	62.43	12.4	+48
68	Rocky Mount, NC	74.57	●	140	58.50	16.1	+72
69	Valdosta, GA	74.50	●	101	64.87	9.6	+32
T70	Columbus, OH	74.03	●	40	79.17	-5.1	-30
T70	Staunton-Stuarts Draft, VA	74.03	●	-	-	-	-
72	Milwaukee-Waukesha, WI	73.57	●	98	65.57	8.0	+26
73	Johnson City, TN	73.07	●	161	55.13	17.9	+88
74	Austin-Round Rock-San Marcos, TX	72.80	●	-	-	-	-
75	Auburn-Opelika, AL	72.67	●	82	70.67	2.0	+7

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76	Toledo, OH	72.63	●	95	67.03	5.6	+19
77	Phoenix-Mesa-Chandler, AZ	72.50	●	T63	74.27	-1.8	-14
78	Dalton, GA	72.30	●	91	68.27	4.0	+13
T79	Logan, UT-ID	72.23	●	T38	79.23	-7.0	-41
T79	Tuscaloosa, AL	72.23	●	74	72.80	-0.6	-5
81	Houston-Pasadena-The Woodlands, TX	72.17	●	-	-	-	-
82	Wilmington, NC	72.00	●	55	76.27	-4.3	-27
83	Tampa-St. Petersburg-Clearwater, FL	71.80	●	81	70.87	0.9	-2
84	Provo-Orem-Lehi, UT	71.23	●	-	-	-	-
85	Lynchburg, VA	71.17	●	102	64.70	6.5	+17
86	Virginia Beach-Chesapeake-Norfolk, VA-NC	71.07	●	-	-	-	-
87	Orlando-Kissimmee-Sanford, FL	71.00	●	T78	71.73	-0.7	-9
88	Columbia, MO	70.93	●	70	73.30	-2.4	-18
T89	Salt Lake City-Murray, UT	70.87	●	-	-	-	-
T89	Roanoke, VA	70.87	●	127	60.77	10.1	+38
91	Idaho Falls, ID	70.23	●	80	71.03	-0.8	-11
92	Killeen-Temple, TX	69.83	●	89	68.60	1.2	-3
93	Blacksburg-Christiansburg-Radford, VA	69.40	●	-	-	-	-
94	Oshkosh-Neenah, WI	69.20	●	119	61.90	7.3	+25
95	St. Louis, MO-IL	69.17	●	116	62.17	7.0	+21
96	Rome, GA	68.97	●	143	57.93	11.0	+47
97	Harrisonburg, VA	68.93	●	77	71.93	-3.0	-20
98	Sherman-Denison, TX	68.87	●	T125	60.87	8.0	+27
99	Twin Falls, ID	68.57	●	35	80.17	-11.6	-64
100	Sioux City, IA-NE-SD	68.53	●	75	72.70	-4.2	-25

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101	Decatur, AL	68.27	●	176	51.67	16.6	+75
102	Memphis, TN-MS-AR	68.17	●	T78	71.73	-3.6	-24
103	Bismarck, ND	67.63	●	T191	49.40	18.2	+88
104	Tucson, AZ	67.40	●	135	59.43	8.0	+31
105	Macon-Bibb County, GA	66.70	●	169	53.40	13.3	+64
106	Tallahassee, FL	66.60	●	153	56.40	10.2	+47
107	Greenville, NC	66.27	●	42	79.00	-12.7	-65
108	Winchester, VA-WV	65.67	●	107	63.83	1.8	-1
109	Allentown-Bethlehem-Easton, PA-NJ	65.57	●	131	60.47	5.1	+22
110	Pocatello, ID	65.30	●	114	62.67	2.6	+4
111	College Station-Bryan, TX	65.03	●	156	56.03	9.0	+45
112	Birmingham, AL	64.97	●	-	-	-	-
113	Greeley, CO	64.90	●	99	65.37	-0.5	-14
114	Lakeland-Winter Haven, FL	64.70	●	97	66.20	-1.5	-17
115	Deltona-Daytona Beach-Ormond Beach, FL	64.37	●	113	62.80	1.6	-2
T116	Kingsport-Bristol, TN-VA	64.20	●	121	61.73	2.5	+5
T116	Palm Bay-Melbourne-Titusville, FL	64.20	●	104	64.50	-0.3	-12
118	Minneapolis-St. Paul-Bloomington, MN-WI	63.90	●	124	60.93	3.0	+6
119	Harrisburg-Carlisle, PA	63.73	●	T146	57.57	6.2	+27
T120	Reno, NV	63.70	●	92	68.23	-4.5	-28
T120	Missoula, MT	63.70	●	T125	60.87	2.8	+5
122	Lansing-East Lansing, MI	63.60	●	100	65.00	-1.4	-22
123	Montgomery, AL	63.40	●	159	55.37	8.0	+36
T124	Portland-South Portland, ME	63.37	●	168	53.63	9.7	+44
T124	Bozeman, MT	63.37	●	-	-	-	-

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T124	Burlington, NC	63.37	●	128	60.70	2.7	+4
T127	Terre Haute, IN	63.33	●	141	58.00	5.3	+14
T127	Owensboro, KY	63.33	●	60	74.70	-11.4	-67
129	Hinesville, GA	62.97	●	296	32.77	30.2	+167
130	Detroit-Warren-Dearborn, MI	62.83	●	T109	63.40	-0.6	-21
131	Denver-Aurora-Centennial, CO	62.60	●	-	-	-	-
132	Sheboygan, WI	62.10	●	136	59.37	2.7	+4
133	Dayton-Kettering-Beavercreek, OH	62.07	●	-	-	-	-
134	Fort Collins-Loveland, CO	61.90	●	-	-	-	-
135	Columbus, IN	61.50	●	118	62.00	-0.5	-17
136	McAllen-Edinburg-Mission, TX	61.43	●	T109	63.40	-2.0	-27
137	Las Vegas-Henderson-North Las Vegas, NV	61.27	●	-	-	-	-
138	Miami-Fort Lauderdale-West Palm Beach, FL	61.03	●	-	-	-	-
139	Joplin, MO-KS	61.00	●	-	-	-	-
140	Florence, SC	60.93	●	164	54.70	6.2	+24
141	Waterloo-Cedar Falls, IA	60.67	●	T146	57.57	3.1	+5
142	Bloomington, IN	59.87	●	139	59.13	0.7	-3
143	Elizabethtown, KY	59.37	●	-	-	-	-
144	Hickory-Lenoir-Morganton, NC	59.10	●	122	61.47	-2.4	-22
145	Jefferson City, MO	58.77	●	198	48.87	9.9	+53
T146	Abilene, TX	58.43	●	166	53.93	4.5	+20
T146	Rapid City, SD	58.43	●	158	55.47	3.0	+12
T148	Elkhart-Goshen, IN	58.40	●	69	73.37	-15.0	-79
T148	Cleveland, OH	58.40	●	-	-	-	-
150	Kennewick-Richland, WA	58.33	●	137	59.23	-0.9	-13

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151	Akron, OH	58.07	●	204	48.00	10.1	+53
152	Gainesville, FL	57.43	●	170	53.13	4.3	+18
153	Scranton--Wilkes-Barre, PA	57.30	●	211	45.90	11.4	+58
T154	St. Cloud, MN	57.00	●	144	57.73	-0.7	-10
T154	Goldsboro, NC	57.00	●	194	49.37	7.6	+40
156	North Port-Bradenton-Sarasota, FL	56.87	●	-	-	-	-
157	Washington-Arlington-Alexandria, DC-VA-MD-WV	56.77	●	148	57.20	-0.4	-9
158	Yuma, AZ	56.67	●	120	61.83	-5.2	-38
159	Portland-Vancouver-Hillsboro, OR-WA	56.43	●	103	64.53	-8.1	-56
160	Lancaster, PA	56.33	●	160	55.30	1.0	-
161	Lawton, OK	56.00	●	200	48.37	7.6	+39
162	Columbus, GA-AL	55.93	●	203	48.07	7.9	+41
163	Port St. Lucie, FL	55.90	●	152	56.60	-0.7	-11
164	Boulder, CO	55.83	●	133	60.37	-4.5	-31
165	Hagerstown-Martinsburg, MD-WV	55.73	●	172	52.67	3.1	+7
166	Grand Island, NE	55.63	●	226	43.77	11.9	+60
167	Ocala, FL	54.93	●	154	56.37	-1.4	-13
168	Cleveland, TN	54.70	●	90	68.37	-13.7	-78
169	Burlington-South Burlington, VT	54.67	●	145	57.67	-3.0	-24
170	South Bend-Mishawaka, IN-MI	54.60	●	T178	51.37	3.2	+8
171	Champaign-Urbana, IL	54.37	●	247	39.63	14.7	+76
172	Coeur d'Alene, ID	54.00	●	112	63.13	-9.1	-60
173	Las Cruces, NM	53.90	●	242	40.20	13.7	+69
174	Brownsville-Harlingen, TX	53.87	●	227	43.73	10.1	+53
175	St. George, UT	53.80	●	150	57.00	-3.2	-25

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T176	Cedar Rapids, IA	53.77	●	129	60.57	-6.8	-47
T176	Charlottesville, VA	53.77	●	88	68.83	-15.1	-88
T176	La Crosse-Onalaska, WI-MN	53.77	●	T257	38.67	15.1	+81
179	Flagstaff, AZ	53.73	●	186	50.43	3.3	+7
180	Jackson, MS	53.70	●	163	54.87	-1.2	-17
181	Daphne-Fairhope-Foley, AL	53.50	●	185	50.70	2.8	+4
182	Pensacola-Ferry Pass-Brent, FL	52.03	●	117	62.10	-10.1	-65
183	Reading, PA	51.93	●	241	40.23	11.7	+58
184	Peoria, IL	51.60	●	250	39.30	12.3	+66
185	Michigan City-La Porte, IN	51.50	●	188	49.63	1.9	+3
186	Lawrence, KS	51.47	●	175	51.77	-0.3	-11
187	Dover, DE	51.40	●	87	69.27	-17.9	-100
188	Bloomington, IL	50.97	●	301	32.30	18.7	+113
189	Monroe, MI	50.80	●	222	44.43	6.4	+33
190	Muskegon-Norton Shores, MI	50.43	●	-	-	-	-
191	Chicago-Naperville-Elgin, IL-IN	49.77	●	-	-	-	-
T192	Baltimore-Columbia-Towson, MD	49.60	●	184	50.77	-1.2	-8
T192	Canton-Massillon, OH	49.60	●	214	45.40	4.2	+22
T192	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	49.60	●	236	41.13	8.5	+44
T195	Dubuque, IA	48.97	●	181	51.27	-2.3	-14
T195	Cheyenne, WY	48.97	●	205	47.73	1.2	+10
197	Longview, TX	48.77	●	260	38.43	10.3	+63
198	Albany-Schenectady-Troy, NY	48.43	●	237	41.10	7.3	+39
199	Mankato, MN	48.37	●	182	50.93	-2.6	-17
T200	Cape Coral-Fort Myers, FL	48.33	●	202	48.17	0.2	+2

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T200	St. Joseph, MO-KS	48.33	●	199	48.43	-0.1	-1
202	Syracuse, NY	48.20	●	201	48.27	-0.1	-1
203	Boston-Cambridge-Newton, MA-NH	47.73	●	171	52.87	-5.1	-32
204	Ann Arbor, MI	47.37	●	165	54.03	-6.7	-39
205	Bend, OR	47.00	●	230	43.43	3.6	+25
T206	Colorado Springs, CO	46.83	●	215	45.37	1.5	+9
T206	Iowa City, IA	46.83	●	300	32.60	14.2	+94
T206	Jacksonville, NC	46.83	●	218	44.97	1.9	+12
T206	Albuquerque, NM	46.83	●	210	45.93	0.9	+4
T210	Myrtle Beach-Conway-North Myrtle Beach, SC	46.73	●	-	-	-	-
T210	Dothan, AL	46.73	●	271	36.87	9.9	+61
212	Racine-Mount Pleasant, WI	46.63	●	-	-	-	-
213	Youngstown-Warren, OH	45.90	●	-	-	-	-
214	York-Hanover, PA	45.83	●	224	44.17	1.7	+10
215	Grand Forks, ND-MN	45.73	●	299	32.67	13.1	+84
216	Pinehurst-Southern Pines, NC	45.70	●	-	-	-	-
T217	Fond du Lac, WI	45.27	●	196	49.13	-3.9	-21
T217	Spokane-Spokane Valley, WA	45.27	●	174	51.93	-6.7	-43
219	Midland, TX	44.50	●	303	32.23	12.3	+84
220	Davenport-Moline-Rock Island, IA-IL	43.97	●	207	47.27	-3.3	-13
T221	Erie, PA	43.90	●	195	49.20	-5.3	-26
T221	Billings, MT	43.90	●	157	55.50	-11.6	-64
T223	Bay City, MI	43.67	●	212	45.53	-1.9	-11
T223	Laredo, TX	43.67	●	266	37.70	6.0	+43
225	Lima, OH	43.30	●	T191	49.40	-6.1	-34

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226	Battle Creek, MI	43.00	●	223	44.33	-1.3	-3
227	Albany, GA	42.97	●	T243	40.17	2.8	+16
228	Florence-Muscle Shoals, AL	42.90	●	259	38.47	4.4	+31
T229	Worcester, MA	42.60	●	-	-	-	-
T229	Kokomo, IN	42.60	●	T178	51.37	-8.8	-51
231	Sacramento-Roseville-Folsom, CA	42.30	●	189	49.57	-7.3	-42
232	Mobile, AL	42.07	●	187	49.90	-7.8	-45
233	Stockton-Lodi, CA	42.00	●	-	-	-	-
T234	Hattiesburg, MS	41.93	●	197	49.10	-7.2	-37
T234	Lake Havasu City-Kingman, AZ	41.93	●	T239	40.43	1.5	+5
236	Hammond, LA	41.50	●	213	45.43	-3.9	-23
T237	Huntington-Ashland, WV-KY-OH	41.23	●	T272	36.73	4.5	+35
T237	Mansfield, OH	41.23	●	275	36.53	4.7	+38
239	Springfield, OH	40.47	●	T257	38.67	1.8	+18
240	Pittsburgh, PA	40.30	●	261	38.30	2.0	+21
241	Brunswick-St. Simons, GA	40.07	●	-	-	-	-
242	Enid, OK	39.93	●	284	34.83	5.1	+42
243	Anniston-Oxford, AL	39.77	●	T255	38.77	1.0	+12
T244	Naples-Marco Island, FL	39.67	●	180	51.30	-11.6	-64
T244	Eugene-Springfield, OR	39.67	●	155	56.27	-16.6	-89
246	Manhattan, KS	39.60	●	269	37.03	2.6	+23
247	Springfield, IL	39.40	●	346	20.60	18.8	+99
248	Saginaw, MI	39.33	●	248	39.60	-0.3	-
249	Hartford-West Hartford-East Hartford, CT	39.30	●	-	-	-	-
250	Kiryas Joel-Poughkeepsie-Newburgh, NY	39.10	●	-	-	-	-

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251	Prescott Valley-Prescott, AZ	39.07	●	225	44.03	-5.0	-26
252	Chambersburg, PA	38.83	●	-	-	-	-
253	Riverside-San Bernardino-Ontario, CA	38.73	●	220	44.77	-6.0	-33
254	San Jose-Sunnyvale-Santa Clara, CA	38.37	●	209	46.70	-8.3	-45
255	Ames, IA	38.03	●	265	37.87	0.2	+10
256	Niles, MI	37.87	●	T239	40.43	-2.6	-17
T257	Baton Rouge, LA	37.77	●	T255	38.77	-1.0	-2
T257	Gulfport-Biloxi, MS	37.77	●	254	38.87	-1.1	-3
259	Monroe, LA	37.73	●	285	34.80	2.9	+26
260	Buffalo-Cheektowaga, NY	37.47	●	245	40.10	-2.6	-15
261	Beaumont-Port Arthur, TX	37.33	●	298	32.70	4.6	+37
262	Flint, MI	37.30	●	T252	38.97	-1.7	-10
263	Traverse City, MI	37.27	●	-	-	-	-
264	Altoona, PA	37.17	●	293	33.00	4.2	+29
265	Lafayette, LA	36.87	●	279	35.63	1.2	+14
266	Helena, MT	36.80	●	-	-	-	-
267	Lebanon, PA	36.73	●	T276	36.20	0.5	+9
268	Sandusky, OH	36.53	●	-	-	-	-
269	San Angelo, TX	36.40	●	T267	37.37	-1.0	-2
T270	Seattle-Tacoma-Bellevue, WA	36.37	●	183	50.83	-14.5	-87
T270	Wichita Falls, TX	36.37	●	289	34.17	2.2	+19
T272	Gettysburg, PA	36.33	●	T272	36.73	-0.4	-
T272	Casper, WY	36.33	●	314	28.67	7.7	+42
T274	San Diego-Chula Vista-Carlsbad, CA	36.20	●	177	51.57	-15.4	-97
T274	Merced, CA	36.20	●	T267	37.37	-1.2	-7

2025 National Ranking	Metro	2025 Score	Quadrant	2024 National Ranking	2024 Score	ΔScore	Δ Rank
T274	Sebastian-Vero Beach-West Vero Corridor, FL	36.20	●	-	-	-	-
277	Texarkana, TX-AR	36.13	●	290	34.00	2.1	+13
T278	Kankakee, IL	35.87	●	331	25.20	10.7	+53
T278	Gadsden, AL	35.87	●	278	36.07	-0.2	-
T280	New Orleans-Metairie, LA	35.80	●	231	43.37	-7.6	-49
T280	Bellingham, WA	35.80	●	132	60.43	-24.6	-148
282	Shreveport-Bossier City, LA	35.47	●	263	37.93	-2.5	-19
283	Grand Junction, CO	35.23	●	233	42.97	-7.7	-50
284	Rochester, NY	34.40	●	217	45.03	-10.6	-67
285	Jackson, MI	34.33	●	235	41.87	-7.5	-50
286	Hilton Head Island-Bluffton-Port Royal, SC	34.03	●	-	-	-	-
287	Lake Charles, LA	33.87	●	238	40.50	-6.6	-49
288	Great Falls, MT	33.70	●	280	35.40	-1.7	-8
289	Slidell-Mandeville-Covington, LA	33.60	●	-	-	-	-
290	Alexandria, LA	33.57	●	294	32.97	0.6	+4
291	Cape Girardeau, MO-IL	33.53	●	T286	34.67	-1.1	-5
292	State College, PA	33.20	●	322	27.47	5.7	+30
293	Rochester, MN	33.17	●	270	36.93	-3.8	-23
294	Hot Springs, AR	33.10	●	304	32.07	1.0	+10
295	Crestview-Fort Walton Beach-Destin, FL	32.70	●	T286	34.67	-2.0	-9
296	Trenton-Princeton, NJ	32.67	●	234	42.80	-10.1	-62
297	Modesto, CA	32.60	●	262	38.17	-5.6	-35
298	Sumter, SC	32.33	●	T243	40.17	-7.8	-55
299	Fresno, CA	32.20	●	246	39.83	-7.6	-53
300	Duluth, MN-WI	32.07	●	335	24.03	8.0	+35

2025 National Ranking	Metro	2025 Score	Quadrant	2024 National Ranking	2024 Score	ΔScore	Δ Rank
301	Visalia, CA	31.97	●	292	33.60	-1.6	-9
302	Anchorage, AK	31.60	●	319	27.90	3.7	+17
303	Norwich-New London-Willimantic, CT	31.27	●	-	-	-	-
304	Minot, ND	30.67	●	-	-	-	-
305	Muncie, IN	30.10	●	312	29.00	1.1	+7
306	New York-Newark-Jersey City, NY-NJ	30.07	●	-	-	-	-
307	Wheeling, WV-OH	30.00	●	318	28.40	1.6	+11
308	Binghamton, NY	29.77	●	326	26.07	3.7	+18
309	Paducah, KY-IL	29.63	●	-	-	-	-
310	Morgantown, WV	29.60	●	321	27.57	2.0	+11
T311	San Francisco-Oakland-Fremont, CA	28.97	●	-	-	-	-
T311	Charleston, WV	28.97	●	313	28.73	0.2	+2
313	Manchester-Nashua, NH	28.73	●	264	37.90	-9.2	-49
314	Houma-Bayou Cane-Thibodaux, LA	28.60	●	-	-	-	-
315	Rockford, IL	28.53	●	327	25.97	2.6	+12
316	Sebring, FL	28.47	●	-	-	-	-
317	Parkersburg-Vienna, WV	28.33	●	323	27.27	1.1	+6
318	Corpus Christi, TX	28.30	●	324	26.93	1.4	+6
319	Bridgeport-Stamford-Danbury, CT	28.03	●	-	-	-	-
320	Panama City-Panama City Beach, FL	27.33	●	-	-	-	-
321	Olympia-Lacey-Tumwater, WA	27.13	●	274	36.57	-9.4	-47
322	Homosassa Springs, FL	26.67	●	308	30.27	-3.6	-14
323	Albany, OR	26.33	●	-	-	-	-
324	Providence-Warwick, RI-MA	26.30	●	330	25.27	1.0	+6
325	Longview-Kelso, WA	25.87	●	-	-	-	-

2025 National Ranking	Metro	2025 Score	Quadrant	2024 National Ranking	2024 Score	ΔScore	Δ Rank
326	Salem, OR	25.67	●	T276	36.20	-10.5	-50
327	Weirton-Steubenville, WV-OH	25.57	●	336	23.73	1.8	+9
328	New Haven, CT	25.43	●	-	-	-	-
329	Punta Gorda, FL	25.40	●	307	30.57	-5.2	-22
330	Midland, MI	25.17	●	337	23.63	1.5	+7
331	Decatur, IL	24.73	●	333	24.23	0.5	+2
332	Yakima, WA	23.93	●	329	25.57	-1.6	-3
333	Beckley, WV	23.90	●	334	24.17	-0.3	+1
334	Bremerton-Silverdale-Port Orchard, WA	23.80	●	232	43.03	-19.2	-102
335	Lewiston, ID-WA	23.43	●	342	21.33	2.1	+7
336	Eagle Pass, TX	22.83	●	-	-	-	-
337	Sierra Vista-Douglas, AZ	22.60	●	T315	28.60	-6.0	-22
338	Johnstown, PA	22.30	●	T349	20.23	2.1	+11
339	Victoria, TX	22.13	●	355	18.93	3.2	+16
340	Pueblo, CO	21.90	●	345	20.87	1.0	+5
341	Atlantic City-Hammonton, NJ	21.60	●	365	14.13	7.5	+24
342	Amherst Town-Northampton, MA	20.90	●	-	-	-	-
343	Wildwood-The Villages, FL	20.83	●	-	-	-	-
344	Utica-Rome, NY	20.70	●	T315	28.60	-7.9	-29
345	Salisbury, MD	20.43	●	-	-	-	-
346	Springfield, MA	19.97	●	343	21.03	-1.1	-3
347	Williamsport, PA	19.63	●	351	19.90	-0.3	+4
T348	Lewiston-Auburn, ME	19.47	●	375	11.37	8.1	+27
T348	Santa Maria-Santa Barbara, CA	19.47	●	341	21.53	-2.1	-7
T350	Walla Walla, WA	19.40	●	291	33.87	-14.5	-59

2025 National Ranking	Metro	2025 Score	Quadrant	2024 National Ranking	2024 Score	ΔScore	Δ Rank
T350	Odessa, TX	19.40	●	353	19.83	-0.4	+3
352	Fairbanks-College, AK	19.30	●	-	-	-	-
353	Watertown-Fort Drum, NY	19.23	●	339	23.23	-4.0	-14
354	Bangor, ME	19.10	●	372	11.73	7.4	+18
355	Los Angeles-Long Beach-Anaheim, CA	18.60	●	338	23.47	-4.9	-17
356	San Luis Obispo-Paso Robles, CA	18.50	●	325	26.13	-7.6	-31
T357	Farmington, NM	18.30	●	369	12.93	5.4	+12
T357	Elmira, NY	18.30	●	357	17.97	0.3	-
359	Vineland, NJ	18.17	●	-	-	-	-
360	Bakersfield-Delano, CA	17.90	●	-	-	-	-
361	Urban Honolulu, HI	17.13	●	352	19.87	-2.7	-9
362	Waterbury-Shelton, CT	16.87	●	-	-	-	-
363	Vallejo, CA	15.97	●	T252	38.97	-23.0	-111
364	Barnstable Town, MA	15.43	●	356	18.83	-3.4	-8
365	Santa Rosa-Petaluma, CA	14.97	●	309	29.37	-14.4	-56
366	Corvallis, OR	14.27	●	359	17.40	-3.1	-7
367	Medford, OR	13.50	●	281	35.13	-21.6	-86
368	Wenatchee-East Wenatchee, WA	12.90	●	-	-	-	-
369	Glens Falls, NY	11.87	●	364	14.33	-2.5	-5
370	Redding, CA	11.17	●	376	10.57	0.6	+6
371	Oxnard-Thousand Oaks-Ventura, CA	10.57	●	368	13.63	-3.1	-3
372	Ithaca, NY	10.47	●	381	8.43	2.0	+9
373	Hanford-Corcoran, CA	10.40	●	366	14.07	-3.7	-7
374	Santa Fe, NM	10.13	●	378	9.83	0.3	+4
375	Kingston, NY	9.97	●	371	12.37	-2.4	-4

2025 National Ranking	Metro	2025 Score	Quadrant	2024 National Ranking	2024 Score	ΔScore	Δ Rank
376	Mount Vernon-Anacortes, WA	9.37	●	283	34.93	-25.6	-93
377	Grants Pass, OR	8.77	●	363	15.57	-6.8	-14
378	Lexington Park, MD	8.37	●	-	-	-	-
379	Carson City, NV	8.17	●	T349	20.23	-12.1	-30
380	Napa, CA	8.13	●	374	11.47	-3.3	-6
381	Santa Cruz-Watsonville, CA	7.33	●	344	20.93	-13.6	-37
382	El Centro, CA	7.07	●	379	9.67	-2.6	-3
383	Pittsfield, MA	6.93	●	383	7.33	-0.4	-
384	Salinas, CA	6.50	●	370	12.57	-6.1	-14
385	Chico, CA	4.60	●	380	8.93	-4.3	-5
386	Yuba City, CA	4.27	●	377	10.50	-6.2	-9
387	Kahului-Wailuku, HI	0.33	●	-	-	-	-

food manufacturing

TAKING THE NEXT STEPS

+ Considerations for Your Business

The GLS Insights Best Places for Food Manufacturing Ranking leverages site selection methodology to focus a project's initial search region at the outset of a location search. Results point to the optimal search region based on a typical food manufacturing project and offer insight into the likely tradeoffs that can be expected within each metro area.

Project-Specific Considerations

Cost and quality scores and rankings will change depending on the project requirements and the search region.

- As a project's requirements deviate from the specifications defined for this ranking, results of the ranking may begin to change. For example, a project with a higher power demand will be more impacted by differences in electricity prices, which may impact the order of the highest-ranked locations. The GLS Insights quality and cost models have been developed to allow for quick sensitivity analysis that can provide an updated location ranking based on a project's unique requirements.
- This ranking assesses the best locations on a national, regional, and state level. However, supply chain factors frequently limit the geographical scope when searching for a suitable location for a food manufacturing project, with essential suppliers or customers playing a vital role in the site selection process. The GLS Insights Best Places ranking includes all metros across the 50 states of the United States and doesn't directly consider the unique supply chain footprint of a specific project. Rankings and placement in the ranking model vary based on the designated search region. Once a project's supply chain network defines a broader search region, the ideal location might also shift accordingly.

Next Steps

The GLS Insights Best Places for Food Manufacturing ranking is intended to identify potential search regions for a food manufacturing project. While this ranking incorporates the availability and pricing of industrial facilities, it does not guarantee that a location will possess a property suitable for a specific project's needs. When possible, companies should not limit their search region to one metro area, as it is not guaranteed that real estate optimal for that project will be available within the project's timeline. Furthermore, a multi-jurisdictional search will be more advantageous for competition and leveraging potential economic incentives.

Additionally, once real estate has been identified within optimal metros, property-specific quality and cost rankings should be performed. This evaluation should include factors such as property characteristics, permitting processes, utility infrastructure, workforce availability within a drive time, and other property-specific considerations that refine the metro analysis. Once specific real estate is incorporated into the model, a location may rank better or worse for the project.

Optimizing a Location

It is not always feasible to select a location that optimizes on both cost and quality. However, incentives can be leveraged strategically to bring a location closer to ideal.

Improve Quality

Workforce development incentives can improve the quality of a location's workforce relative to a project's requirements. These programs can include customized skill development, exclusive job advertisements and hiring events, and onboarding programs developed by the local community college.

Infrastructure improvements can be negotiated to improve logistics and utility access and reliability. For example, a community or state may commit to adding deceleration lanes or lighted intersections to provide a safer route for a project's trucking and employee traffic. Streamlined and expedited permitting can be either programmatic or offered for a specific project to allow for ease in navigating any regulatory obstacles and provide speed-to-market.

Decrease Cost

Cost-reducing incentives can offer a temporary reprieve or reduction in expenses to make a relatively high-cost location more attractive.

Investment cost incentives can range from free or reduced land to in-kind extension or upgrades of utility infrastructure. Depending on the project parameters, some locations may offer cash grants to directly reduce investment costs.

Incentives that reduce operating costs also vary. Many locations offer tax credits and property tax abatements that reduce tax liability for a set period. These incentives are often tied to project job and capital investment commitments. Utility rate discounts can also be negotiated, typically for a period of three to five years; for large users, special rates that extend for longer periods can be negotiated.

Not All Incentives are Created Equal

The focus of any incentive negotiation should be leveling the playing field between best-suited locations. Incentives alone cannot make a bad location good; they can only make a good location better. An optimal incentive package is one that focuses on the specific needs of a unique project and offsets lower-quality and higher-cost attributes of the finalist location.

In addition to negotiating a location- and project-specific incentive package to make the finalist location more attractive, it is critical that a project consider the true value of the incentives offered. Many states and localities will offer an incentive package with an overinflated value due to statutory cost offsets or tax credits that cannot be realized by the company. A full, multi-year financial pro forma and cost comparison should be conducted between finalist locations to ensure the project makes a well-informed, data-driven location decision.

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ENDNOTES

¹ US Bureau of Labor Statistics, 2024 Q4 Average

² JobsEQ, 2024 Q3 Average.

³ The American Immigration Council (AIC) ([Mass Deportation: Devastating Costs to America, Its Budget and Economy](#))

⁴ fDi Markets, Projects data

⁵ Federal Reserve Bank of St. Louis. *Producer Price Index by Industry: Commercial and Institutional Building Construction (PCU236211236211)*. U.S. Bureau of Labor Statistics. Retrieved from <https://fred.stlouisfed.org/series/PCU236211236211>

⁶ Based on the consultation with Gray

⁷ The U.S. Food and Drug Administration (FDA), [Use of the "Healthy" Claim on Food Labeling](#)

⁸ The U.S. Food and Drug Administration (FDA), [FDA to Revoke Authorization for the Use of Red No. 3 in Food and Ingested Drugs](#)

⁹ The U.S. Food and Drug Administration (FDA), [FDA Revokes Regulation Allowing the Use of Brominated Vegetable Oil \(BVO\) in Food](#)

¹⁰ U.S. Department of Agriculture, [Data Base](#)

¹¹ The American Immigration Council (AIC) ([Mass Deportation: Devastating Costs to America, Its Budget and Economy](#))

¹² The exact cost breakdown for each location will differ somewhat based on that location's cost structure. This cost distribution is an average for the food manufacturing project profile used for this analysis.

¹³ Some metros span across multiple states and therefore may belong to multiple regions. The 50 states of the United States are comprised of 387 unique metros.



Global Location Strategies is the leading site selection and incentive negotiation firm for manufacturing and industrial companies, strengthened by proprietary software and more than six decades of experience. Whether you are expanding into a new market or scaling up a new technology, your location investment decision will not only impact your success but will also have an indelible mark on the community, your company, and your team.

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