U.S. Kitchen Incubators

An Industry Update

March 2016

ACT
AMERICAN COMMUNITIES TRUST

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URBANE
DEVELOPMENT

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ACT is a national community development partner dedicated to building strong, vibrant communities by partnering with nonprofit and for-profit organizations to develop community investment strategies that have lasting social impact and create economic opportunity.

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Econsult Solutions Inc. provides insights into economic problems, policy questions, and strategic thinking focused on providing customized economic expert services in Real Estate, Transportation, Economic Development, and Public Policy and Finance.

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Urbane Development is a community development venture that cultivates innovative solutions to build dynamic neighborhoods and positively impact underserved communities.

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Cover images courtesy of CommonWealth Kitchen, Dorchester, MA.

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Introduction

Between August 2013 and March 2016 the number of kitchen incubators in America has increased by more than 50% to over 200 facilities. Of the 61 facilities surveyed, 82% say their revenue has increased over the past three years, and 84% are breaking even or making money. During research for the first state-of-the-industry report "U.S. Kitchen Incubators: An Industry Snapshot" two and a half years ago, some appeared to feel that kitchen incubators were a post-recession fad that would peter out once the economy regained its footing. However, the industry has seen the opposite–sustained and explosive interest in food entrepreneurship that has led to the continued demand for shared-use food production space. According to the Specialty Food Association, the specialty food industry grew 21% between 2012 and 2014 into over a $100 billion industry.[1]

Over the past few years kitchen incubators have become larger and more sophisticated–grabbing headlines in local and national press. For example, CommonWealth Kitchen (formerly Crop Circle Kitchen) expanded into its beautiful new 36,000 square-foot home in Dorchester, MA. L.A. Prep opened its 56,000 square-foot space, launching with 54 commercial kitchens. At the same time, most kitchen incubators are still small facilities at 5,000 square feet or less. Some facilities focus on the high-end of the artisanal food market, while others continue to focus on immigrant and low-income communities. Today, 61% of kitchen incubators are for-profit and 39% are nonprofit.

Kitchen incubators continue to be risky endeavors with complex operations and low margins. The success of kitchen incubators continues to rely on operators going beyond just providing shared space and offering a more diverse set of resources for culinary entrepreneurs. These resources typically include small-business counseling and technical assistance, connecting with affordable capital, and providing access to new markets and contract opportunities. A small but growing set of kitchen incubators are part of multi-faceted facilities that also include retail, clustered commercial food producers, public markets, food distributors, and job training. For example, Findlay Market in Cincinnati is opening a kitchen incubator in addition to its successful and historic public market.

The continued growth of kitchen incubators makes sense because it is a concept that lands at the nexus of several trends: the artisanal food movement, the sharing economy, and the current spike in entrepreneurship as a career. Food is a powerful tool for job creation and economic development and this research aims to better understand the role of kitchen incubators in that equation. Still, the industry continues to evolve rapidly and may still be on the front end of what is and will continue to be an important movement in democratizing, localizing, and broadening the economic impact of America's food production and manufacturing sector.

[1] "The State of the Specialty Food Industry 2015," Specialty Food Association, April 7, 2015, https://www.specialtyfood.com/news/article/state-specialty-food-industry-2015.

Terminology

In 2013, Econsult Solutions, Inc. ("ESI") published "U.S. Kitchen Incubators: An Industry Snapshot" - a first of its kind study on national approaches to supporting culinary micro-enterprise. In researching the report, the project team found that a variety of terms referring to shared kitchen facilities are used interchangeably, including "shared-use kitchen," "kitchen incubator," and "kitchen accelerator." While these facilities all provide shared space for culinary businesses, it is important to note that there is a difference between a "shared-use kitchen" and an "incubator" or "accelerator." The main differentiator is that a shared-use kitchen provides little to no supportive services for entrepreneurs, which incubators and accelerators both offer. An incubator can be further differentiated from an accelerator by the fact that an incubator is focused on new and very early-stage businesses, whereas an accelerator is focused on established businesses looking to move on to a more robust stage of business development.

Many facilities run a fine line between being a shared-use kitchen and an incubator or an incubator and an accelerator. The project team determined that it was not truly feasible or productive to differentiate between these three types of facilities. Throughout this report, the term "kitchen incubator" is used to represent the facilities surveyed here, keeping in mind that some may be better defined as shared-use kitchens with limited business support services, and others as accelerators, focusing on later stage business growth.

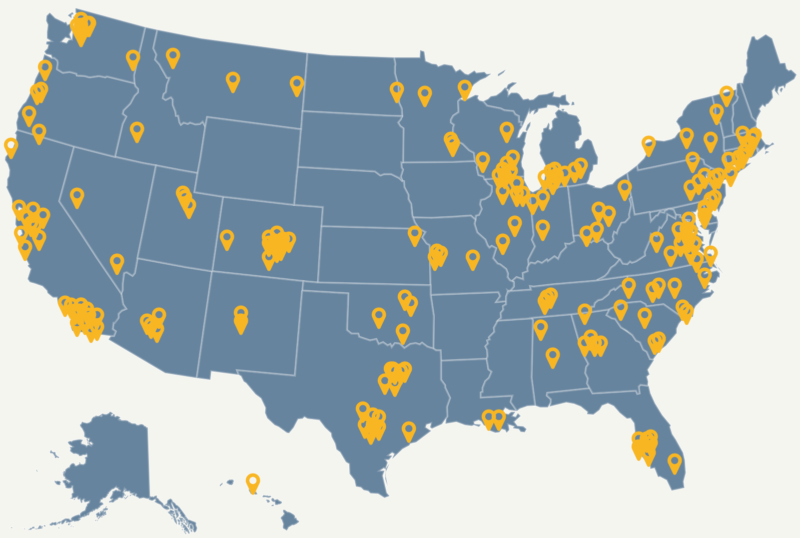
A **kitchen incubator** is a culinary production facility that can accommodate multiple tenants and is dedicated to growing early-stage wholesale, retail, and/or catering food businesses.

Location and Context

Kitchen incubators have a presence in 39 states throughout the country, with a slightly higher representation in the West and South. Incubators continue to be found mostly in urban and suburban contexts with concentrations in the largest cities.

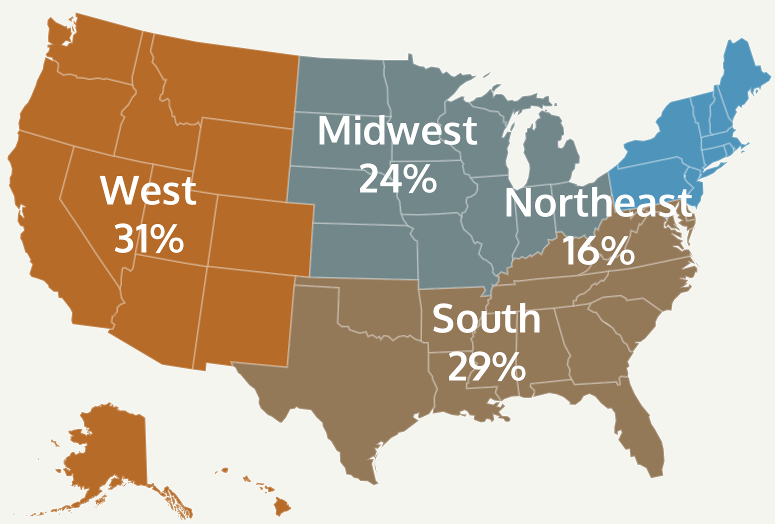
Incubators Have a National Reach Across the U.S.

Over 200 incubators are present in 39 states plus the District of Columbia, displaying a nationwide demand.



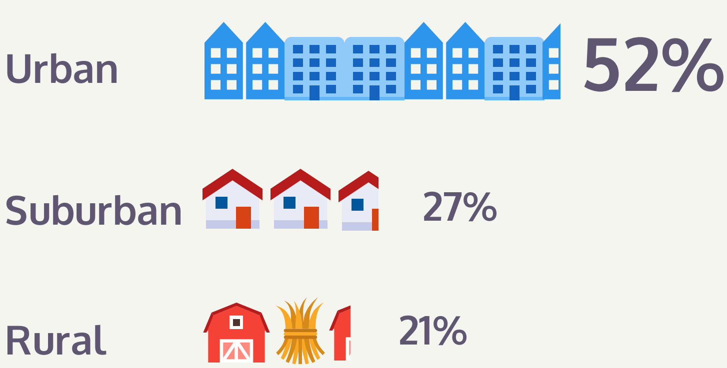
Regional Distribution But More Representation in the West and South

While incubators are represented relatively evenly across regions, the large numbers of incubators in California (30), Colorado (13), and Texas (11) drive higher representation in the West and South.



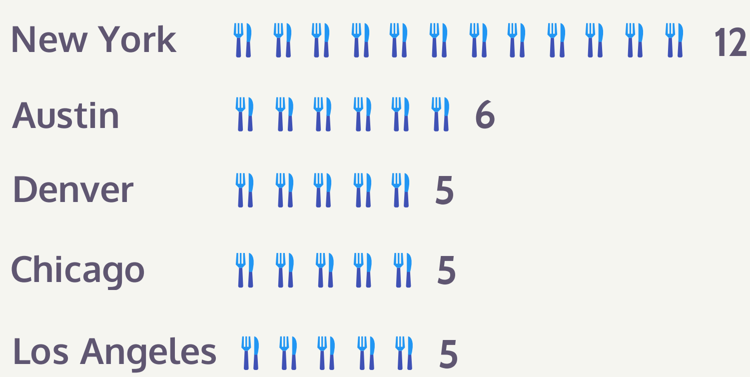
Half Are In Urban Areas

Fifty-two percent of kitchen incubators identify as being in an urban area in a distribution similar to the 2013 results of 58% urban, 22% suburban, and 20% rural.



Concentration Near Major Cities

Kitchen incubators continue to be an urban trend and are concentrated in certain metropolitan areas. The five cities with the most incubators represent 15% of all national incubators.



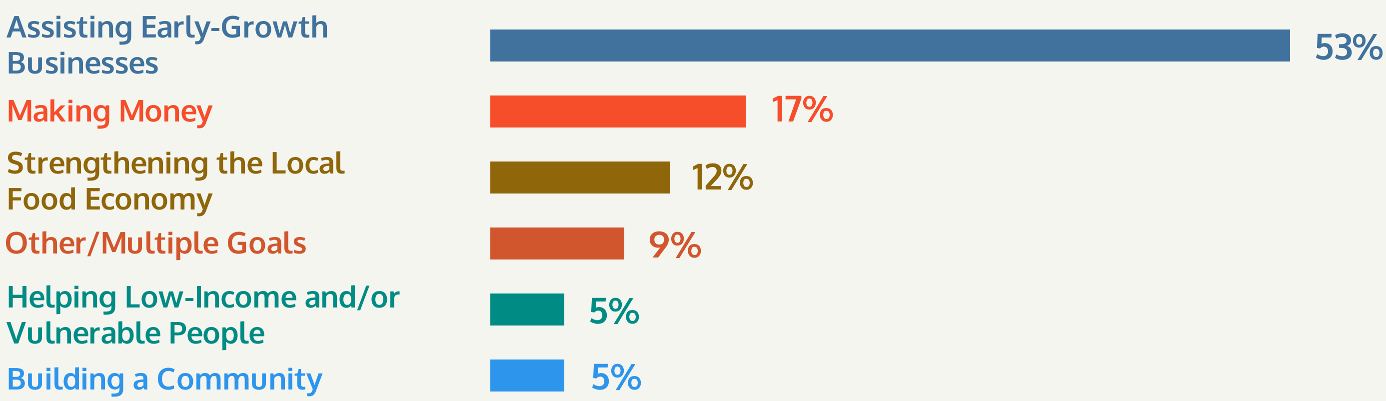
Characteristics

Over 50% of respondents identify the primary goal of their facility as assisting early-growth businesses, even while 61% operate as for-profit. Kitchen incubators remain a new phenomenon, as almost two-thirds were established since 2010.

Over Half View a Mission-Based Focus as Their Primary Goal

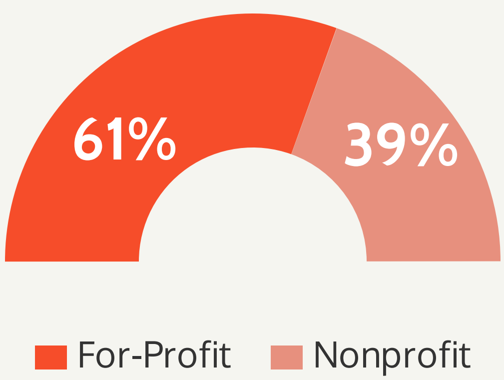
Asked about the primary goal of their facilities, a majority of respondents claim to prioritize a basic mission of incubators: assisting early-growth businesses. This response, in addition to another 12 percent who chose "strengthening the local food economy," indicate that, regardless of corporate classification, many kitchens are mission-focused.

How would you describe the primary goal of your facility?



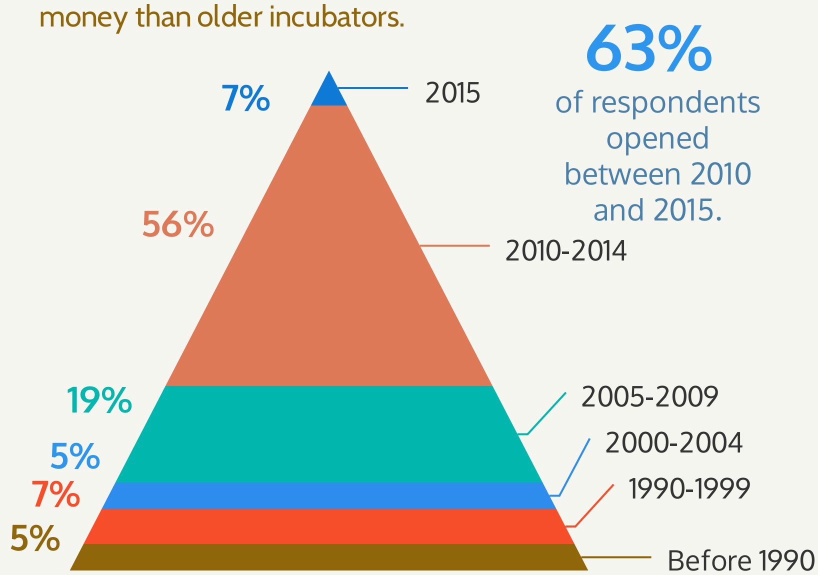
A Majority Operate as For-Profit

The majority of incubators classify as for-profit, at the same percentage as in 2013.



Two-Thirds Established Since 2010

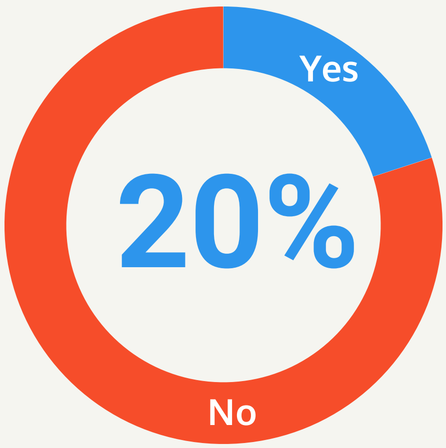
Most incubators were recently established, similar to the 2013 results. The newer establishments were slightly more likely to be for-profit and more likely to be losing money than older incubators.



One-in-Five Are Certified by the USDA

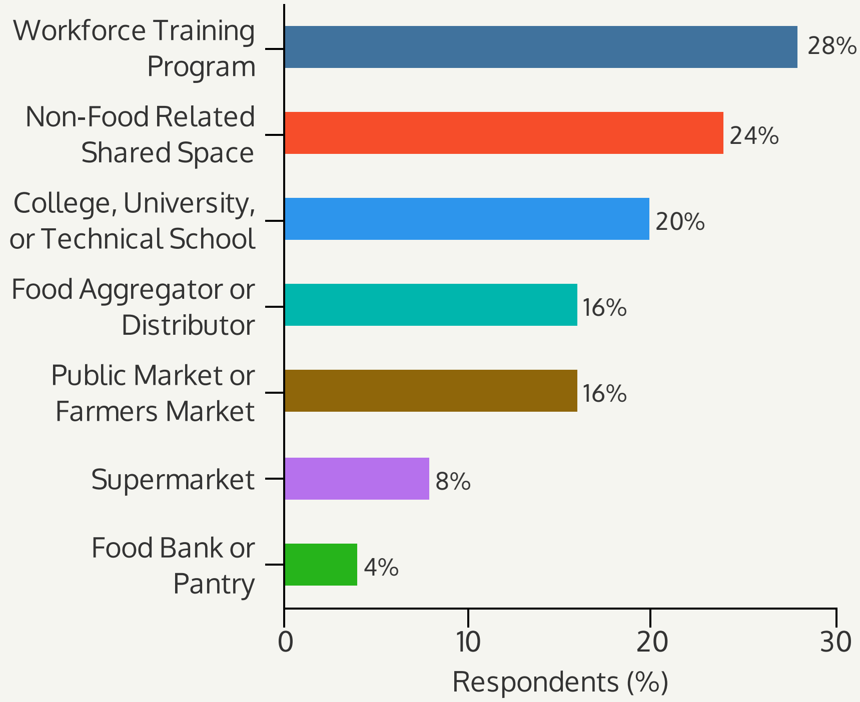
Twenty percent have USDA certification for processing meat, poultry, and egg products. Similarly, only 23% were certified in 2013.

Is your facility USDA certified?



40% of Incubators Are Involved in at Least One Partnership

Does your facility include or are you part of any of the following?



Role and Mission of Incubators Evolve Over Time

Has the name, function, or mission changed over time?

"As we grew the manufacturing of our own product lines and co-packing for other companies, we found that there was a huge need for commissary space for caterers and food trucks. Our business model changed from strictly manufacturing to leasing shared use kitchen, warehouse and cold storage space to those types of businesses."

"Used to be a true incubator conceptually, but most businesses never left the facility. Now more focused on business development and job growth on-site."

"We evolved from a shared use kitchen to incubator program and now have a special emphasis on low-income entrepreneurs as much as possible (depending on grant funds)."

"Constantly redefining the business incubation aspects of our program - particularly to fit the needs of our clients as they grow and change."

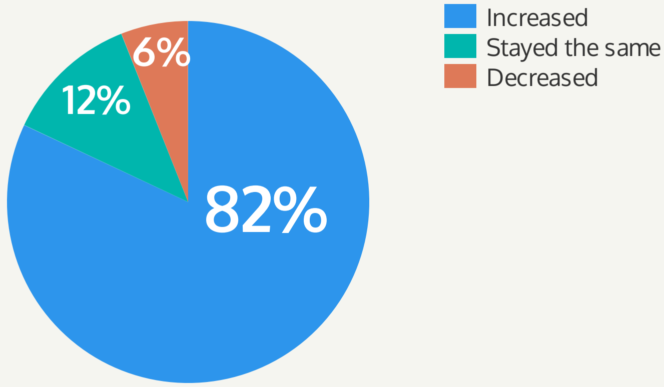
Financial Status

The financial status of many kitchen incubators appears to be strengthening. A larger portion of incubators report making money than in 2013 and 82% report earning more revenue than three years ago. Most nonprofit incubators and 40% of all incubators have received grant support.

82% of Incubators Have Seen Revenue Increase In Past Three Years

Encouragingly, 82% of incubators have seen revenue increase as compared to three years ago or when opened if less than three years old.

Has your revenue increased, decreased, or stayed the same compared to three years ago?



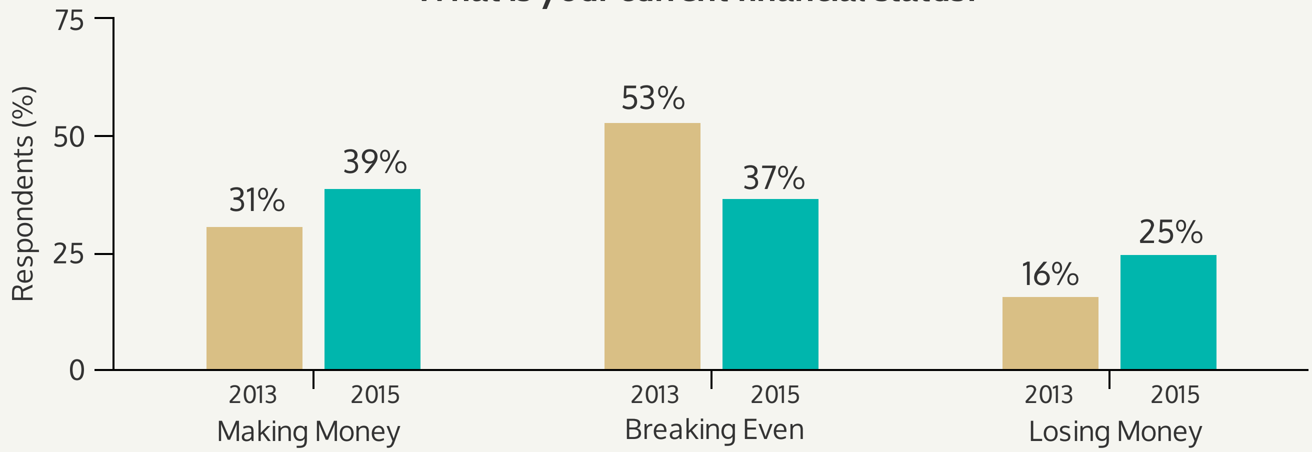
Most Nonprofit Incubators Have Received Grant Support

70% of nonprofit incubators and **40%** of all incubators have received grant support.

More Are Profitable, But More Are Losing Money Too

A growing number of incubators are reporting that they are profitable, although the number losing money also increased. Rural incubators in particular appear to be struggling as none reported making money and half of the incubators losing money are rural.

What is your current financial status?



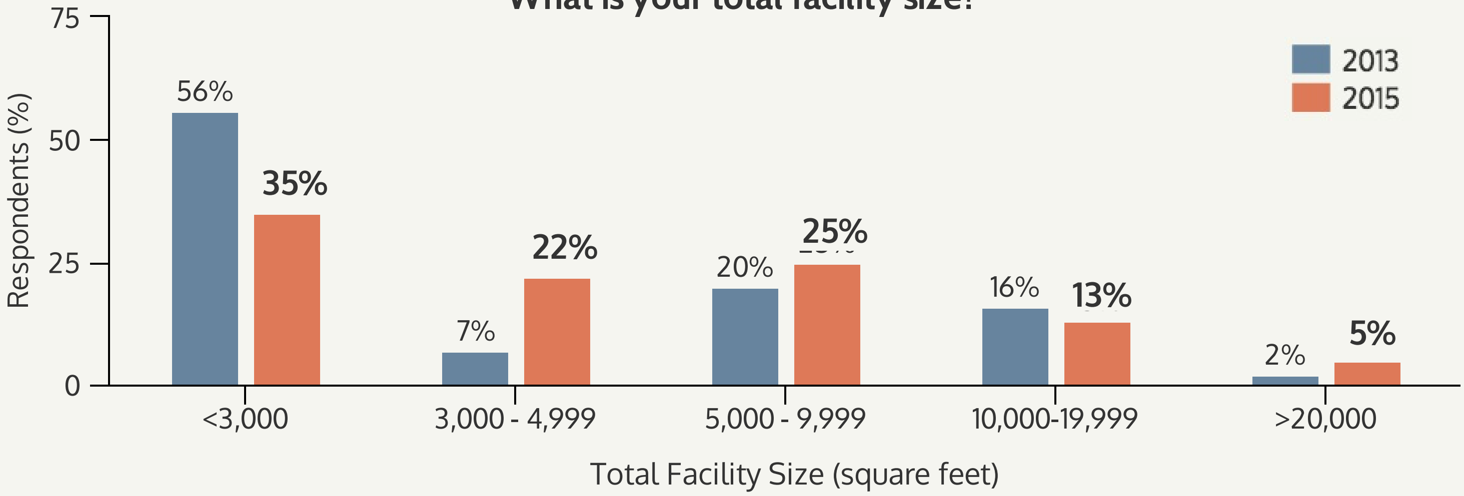
Facilities

Many kitchen incubators are small facilities, with over one-third occupying less than 3,000 square feet and over 80% occupying less than 10,000 square feet. Most facilities have cold, dry, and freezer storage, as well as packaging and food truck commissary space.

More Midsize Incubators Between 3,000 and 10,000 Square Feet

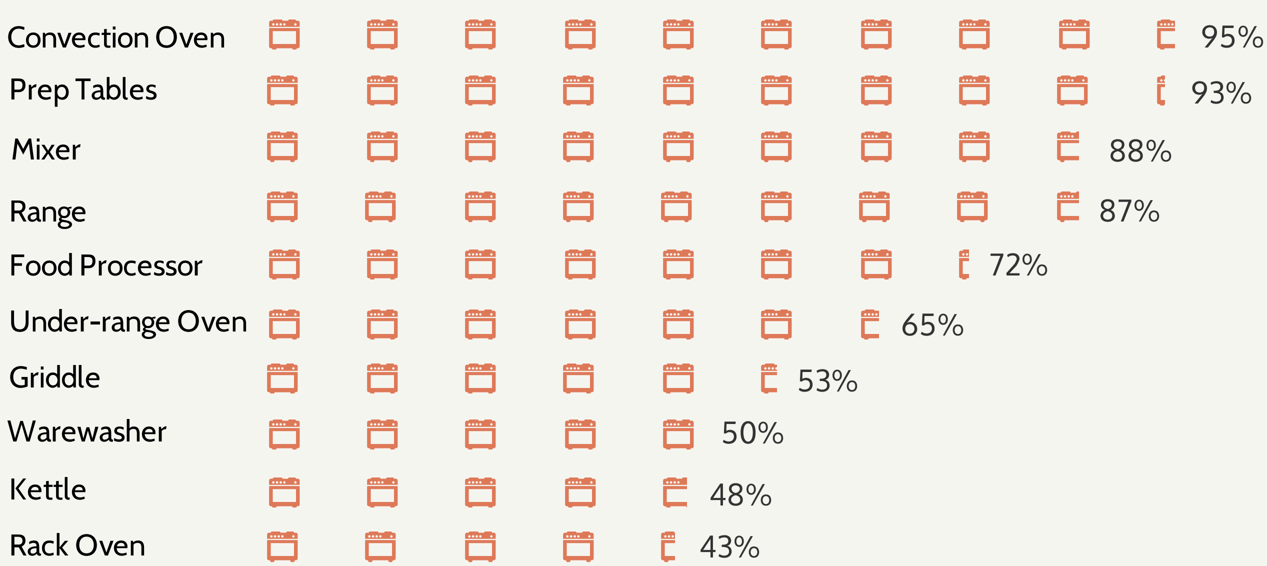
Kitchen incubators are generally small, with over 50% less than 5,000 square feet. Compared to 2013, there has been a decrease in facilities less than 3,000 square feet and an increase in those 3,000 to 10,000 square feet.

What is your total facility size?



Ovens and Prep Tables Are The Most Common Provided Equipment

What equipment do you provide to tenants/members?



Storage and Packaging Are The Most Common Facilities

Most facilities have cold, dry, and freezer storage, which were also the most common in 2013. Other less common but trending facilities are video production studios, food testing facilities, and copacking facilities each in 17% of respondents.

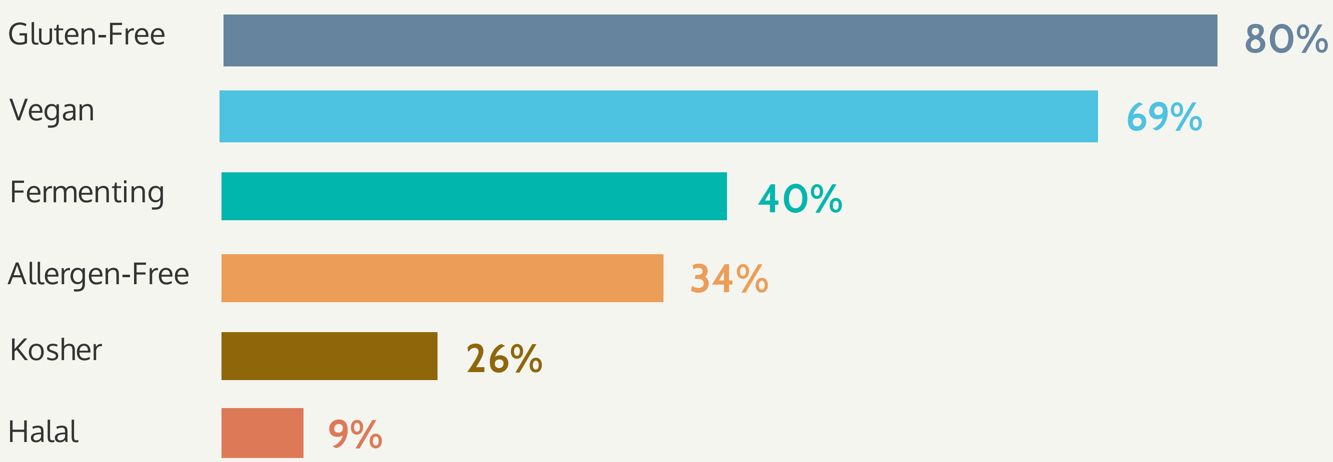
What facilities are available?

Shared Cold Storage	87%	Event Space	52%
Shared Dry Storage	85%	Classroom Space	47%
Shared Freezer Storage	83%	Permanent Food Production Space	47%
Packaging area	63%	Shared Bakery	45%
Food Truck Commissary	60%	Office Space For Tenants	45%
Shared Prep Space	53%	Food Retail on Premises	30%

80% Accommodate Gluten-Free Products

Many respondents are able to accommodate businesses serving a range of dietary restrictions with gluten-free the most common, in line with recent food trends.

Do you accommodate any of the following?

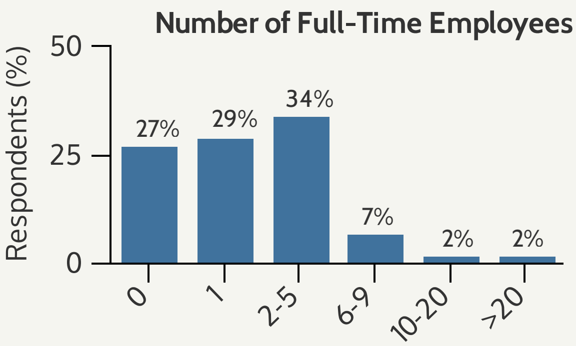


Operating Model

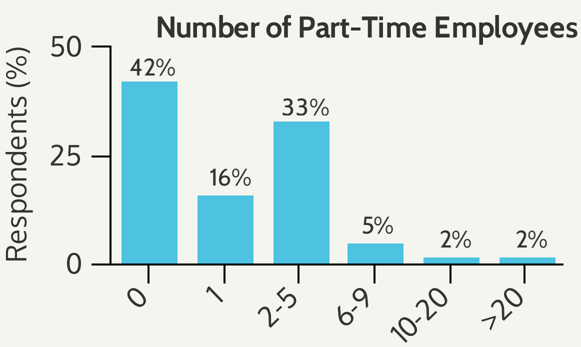
Kitchen incubators are very lean operations with few employees and modest operating budgets. Most costs go towards rent and salaries with lesser amounts to utilities and maintenance. Most revenue is generated from renting shared or permanent space, or through a variety of smaller revenue-producing activities.

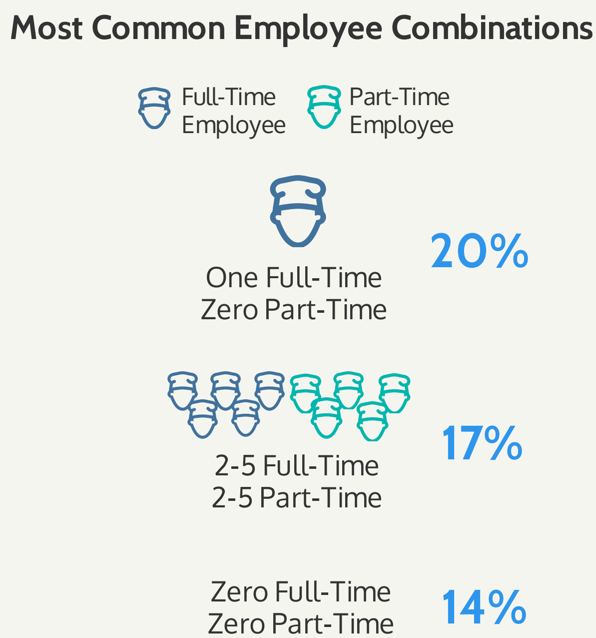
Kitchen Incubators Have Few, If Any, Employees

Most incubators have very few full- and part-time employees, including eight facilities that claim to have no full- or part-time employees at all. Ninety percent have five or fewer full-time employees, similar to 2013 when 87% had five or fewer.



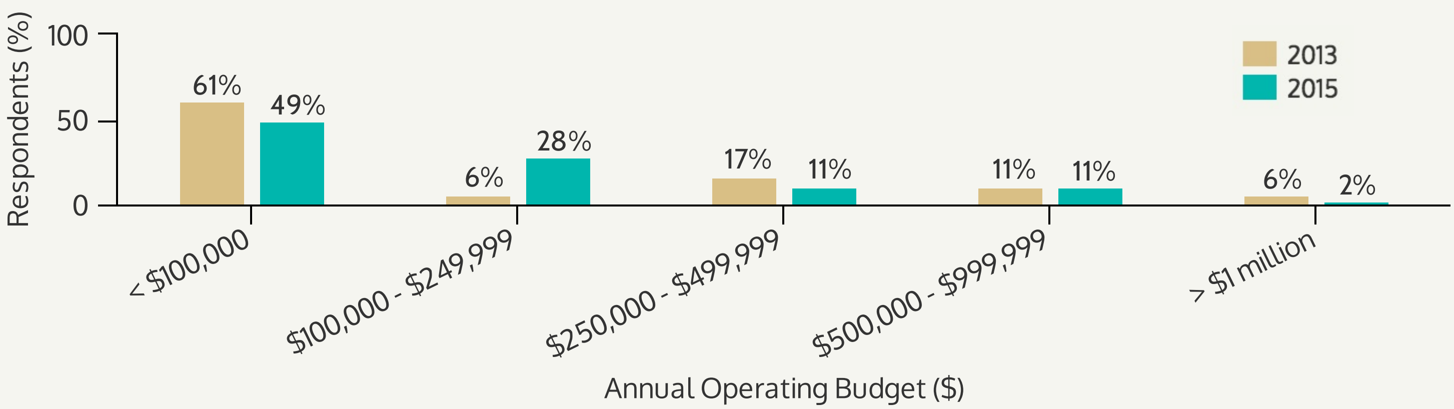
90% of respondents have five or fewer full-time employees





Half Operate On Less Than $100,000 With Midsized Operations Growing

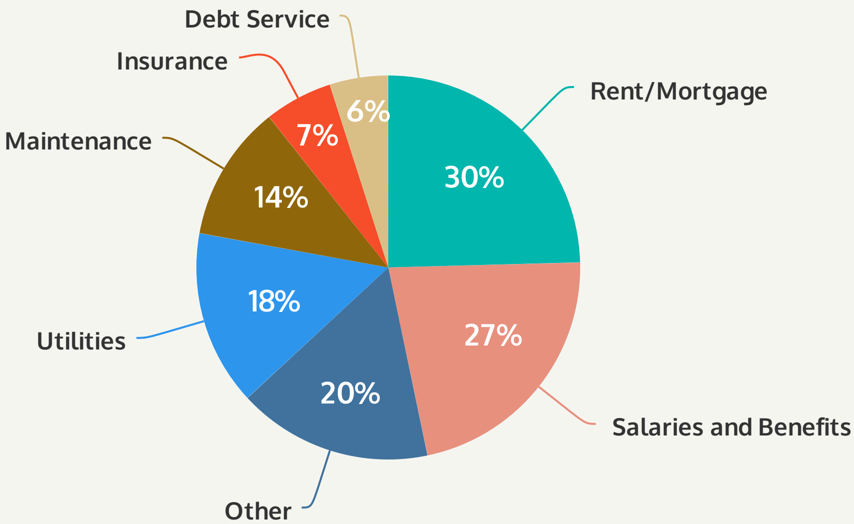
Incubators with operating budgets of less than $100,000 make up half of all respondents, down from 61% in 2013. Those with a budget of $100,000-$249,999 saw the most growth from 6% in 2013 to 28% in 2015.



Largest Operating Costs Are Rent and Salary

The highest operating costs for incubators are rent/mortgage, salaries and benefits, and other costs, with utilities, maintenance, insurance, and debt service making up smaller, but still significant portions of costs.

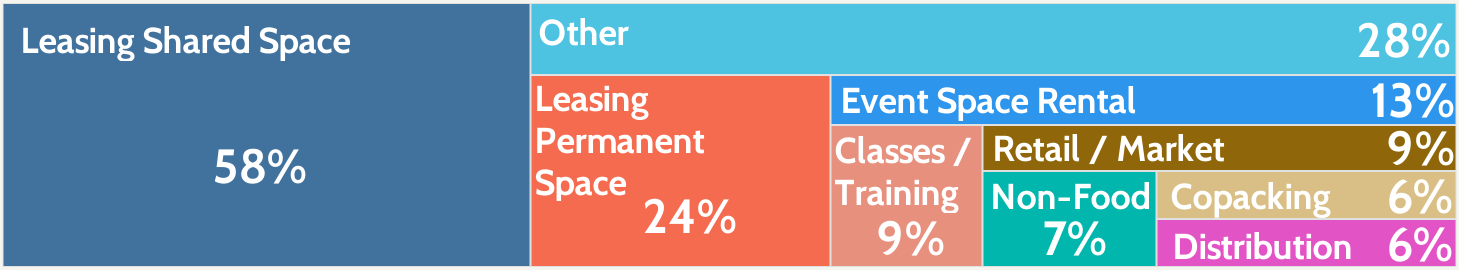
Average Total Operating Cost by Type



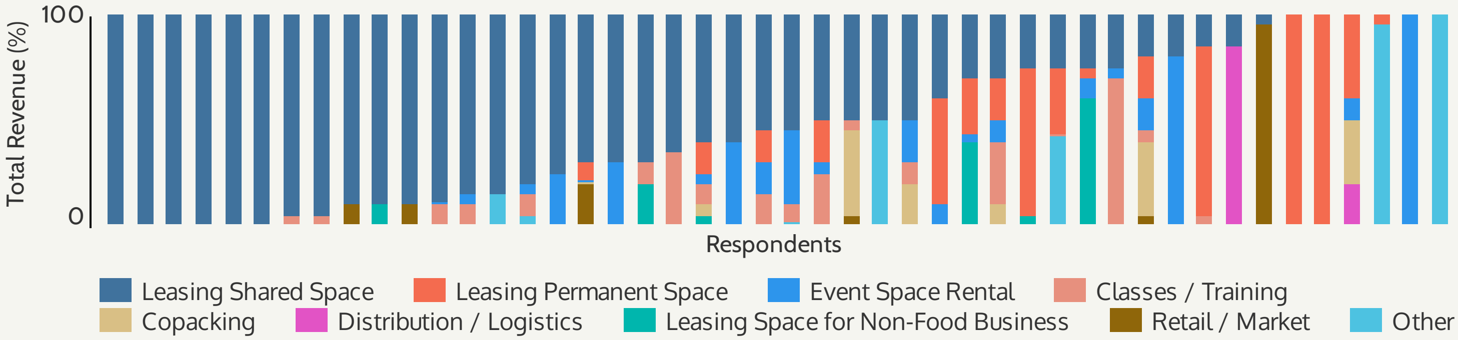
Leasing Shared Space Is the Primary Revenue Source for Most Incubators

Leasing shared space for food production is by far the biggest revenue source for incubators, making up an average of 58% of total revenue across respondents and accounting for 75% or more of total revenue for 37% of respondents. Leasing permanent space makes up a high portion of revenue for several respondents, indicating a greater focus for some facilities on full-time tenants than shared space.

Average Percent of Total Revenue by Revenue Source



Percentage of Total Revenue by Revenue Source



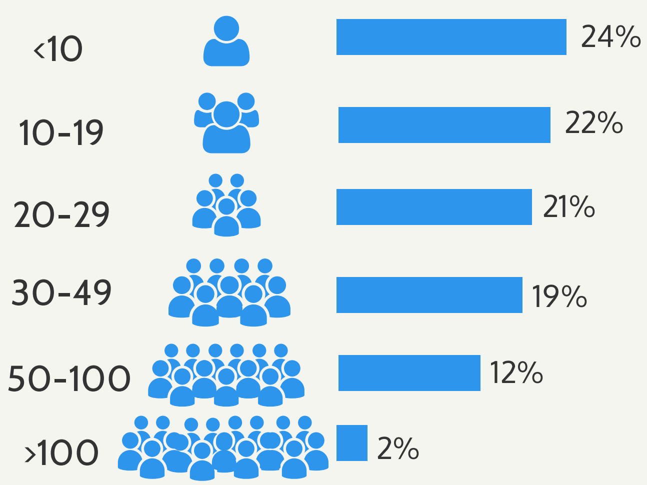
Tenants

Two-thirds of incubators have fewer than thirty tenants who utilize a small number of shared spaces. Tenants generally stay longer than a year, although few lease full-time space. On average, females make up slightly more than half of tenants and minorities make up almost 30 percent.

Two-Thirds Have Fewer Than Thirty Tenants

Most incubators have between zero and thirty tenants with a median in the range of 20-29 tenants.

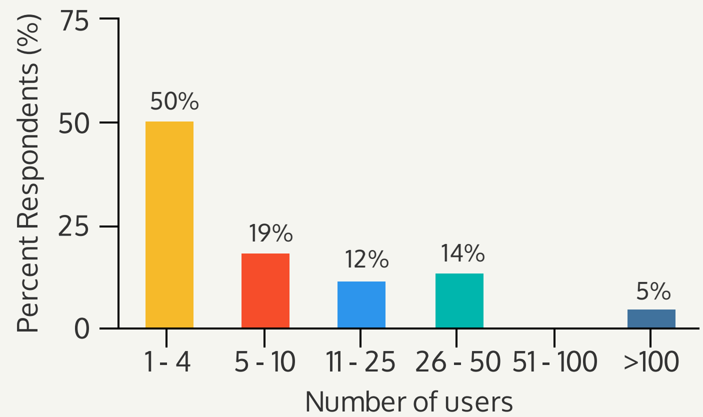
How many shared-space tenants/members do you currently have?



Half Can Accommodate Up To Four Shared Users at a Time

Kitchen incubators accommodate small numbers of shared users at a time. Facilities accommodating 1-4 shared users ranged in size from less than 3,000 square feet to 50,000 square feet, suggesting that some shared spaces may be a small part of a larger facility.

How many shared users can you accommodate at one time in your shared-use space?



75% Report Tenants Stay One Year or Longer

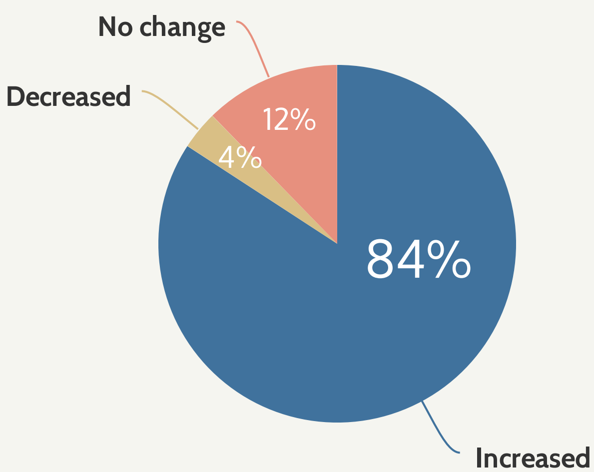
Respondents report long stays for their tenants, as almost half said their tenants stay 1-3 years and another 29% report tenancies of longer than three years. In 2013, only 35% reported their tenants staying more than 12 months.

How long do tenants/members typically stay in your facility before moving out?

84% Have Seen an Increase in Tenants in the Past Three Years

Indicating a higher interest in incubators, 84% of respondents reported that their membership has increased over the past three years.

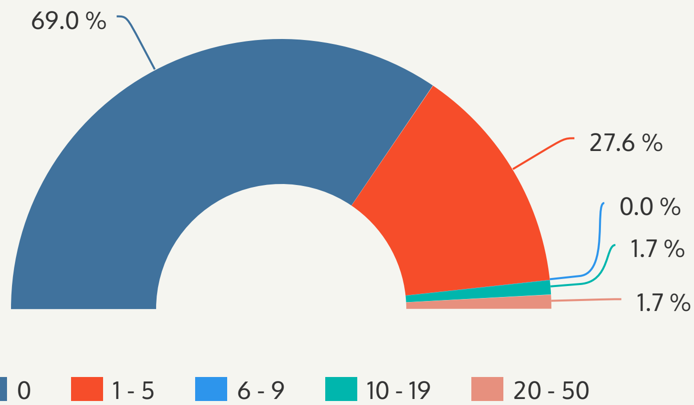
Has the number of your tenants/members increased, decreased, or stayed the same over the past three years?



Almost One-Third Lease Full-Time Production Space

31% of respondents report having at least one tenant who leased full-time production space - defined as space that is exclusive to one tenant and is not shared with others.

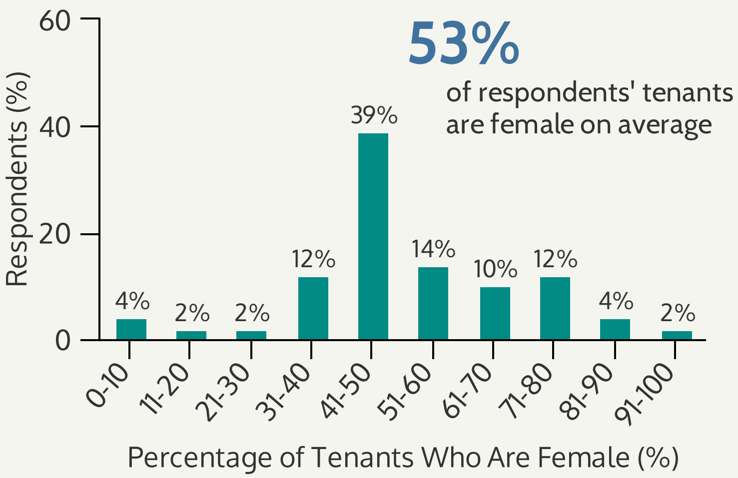
How many tenants do you have currently that lease full-time production space?



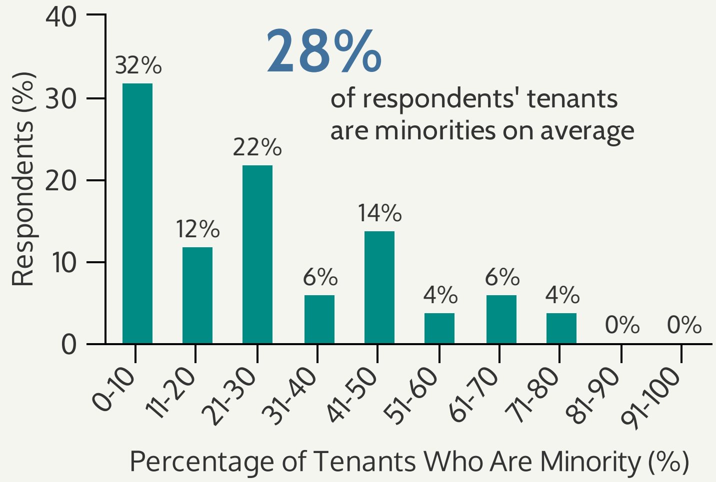
53% of Tenants Are Females and 28% Are Minorities

The highest number of respondents claim that women make up between 41%-50% of tenants with 42% reporting that women make up more than half of their tenants. On average, women make up 53% of tenants, down slightly from 61% in 2013. Minorities average 28% of tenants across respondents, down slightly from 32% in 2013, although 42% of respondents report that between 21% and 50% of their tenants are minorities.

What percentage of your current tenants are female?



What percentage of your current tenants are minorities?



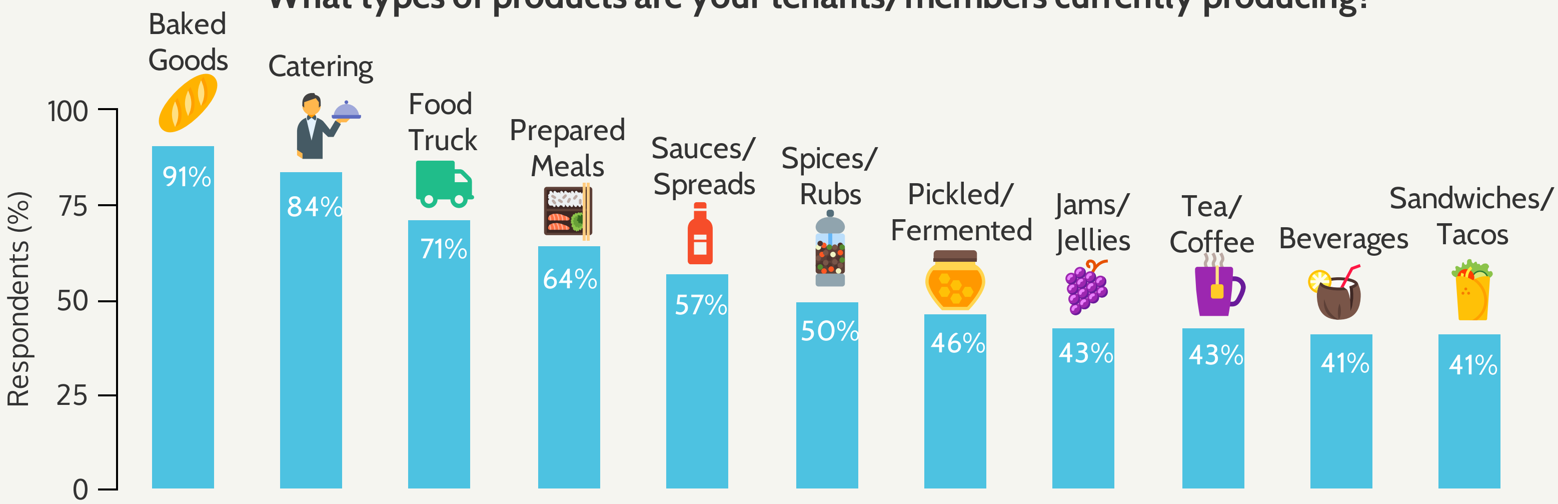
Products

Baked goods and catering remain the most common business products of incubators, although food trucks and prepared meals are quickly growing. Sales are made mostly in the local community, although 75% of respondents report that their tenants sell online, as well.

Baked Goods Remain the Most Common Product

Baked goods and catering, the two most common products in 2013, remain the most common business products at kitchen incubators in 2015. Food trucks jumped from a presence at 30% of facilities in 2013 to 71% in 2015 and prepared meals rose from 48% to 64%. Food trucks and prepared meals were also the two products most considered to have gained popularity in the last 3 years.

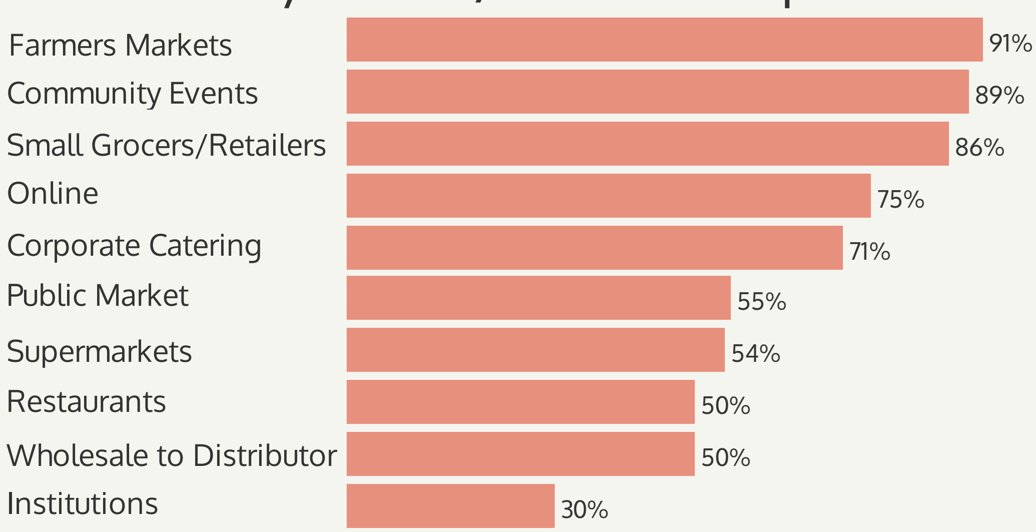
What types of products are your tenants/members currently producing?



Products Are Sold at Local Spaces and Online

Businesses are selling products at smaller community events and retailers, although 75% of respondents report that tenants are selling products online, as well.

Where do your tenants/members sell their products?



Other Products

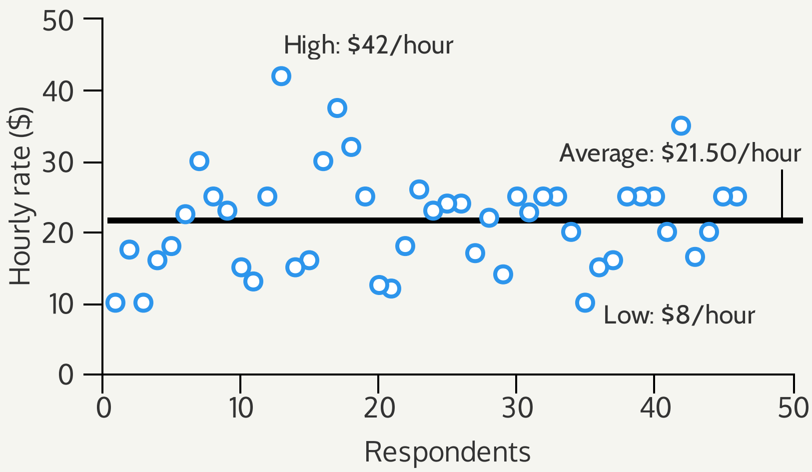
	Respondents
Chocolate	28.6%
Energy Bars	25.0%
Ice Cream	23.2%
Pasta	16.1%
Sausage and Meat Products	8.9%
Alcohol	5.4%
Energy Drinks	5.4%
Cheese	3.6%

Rates and Payment

Typically, kitchen incubators charge tenants for using shared space, storage, and prep space at rates calculated per use for blocks of 2-4 and 4-8 hours. Some variable rates are offered, which are most commonly price breaks for renting more hours or renting during off-peak times.

Hourly Rate Averages $21.50 Per Hour

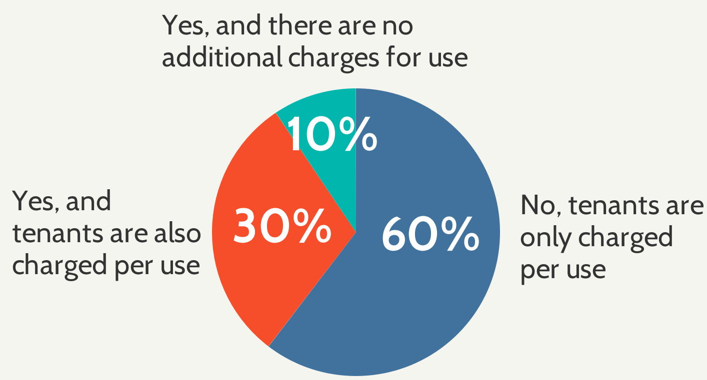
89% of respondents offer hourly rates. These rates range from $8 to $42 per hour and average $21.50, which is up slightly from $20.82 in 2013. Nonprofit incubators charge slightly higher at $23 per hour compared to $20 per hour for for-profits.



60% Charge Per Use With No Monthly Fee

60% of respondents charge tenants only by their use of the facility without a monthly fee, 30% charge a monthly fee and per use, and 10% charge a blanket fee that covers all usage.

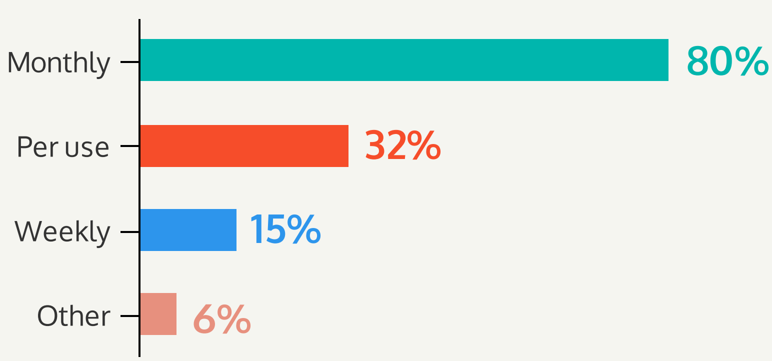
Do you charge a blanket monthly fee to your shared-use tenants?



Most Common Frequency of Billing Is Monthly

80% of respondents bill tenants on a monthly basis, and 32% bill at the time of use either separate from or in addition to monthly charges.

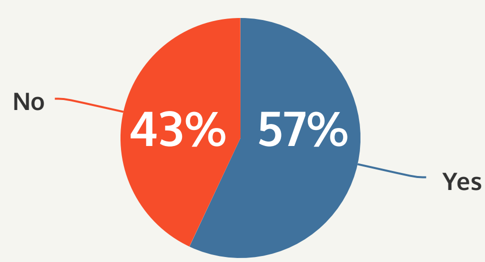
How often do you bill members/tenants?



57% Rent Out Prep Space Alone

57% of respondents offer renting prep space alone, often at lower rates or free if no equipment is used. Some provide a dedicated space for prep, while others repurpose event or general spaces with tables for prep use.

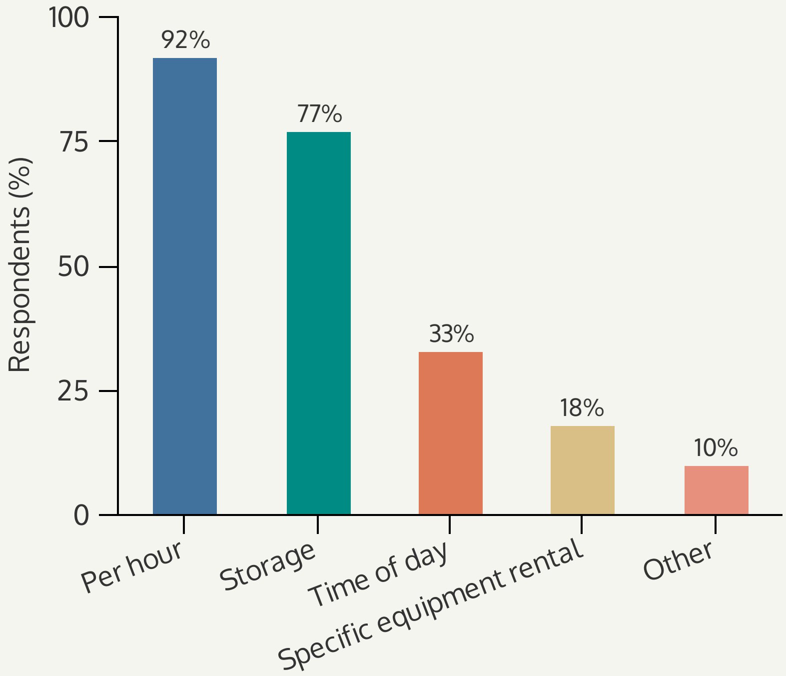
Do you rent prep space alone, without other kitchen equipment?



Per-Use Charges Common For Hours and Storage

Nearly all incubators charge by the hour, most charge for storage, and few charge based on the time of day or for use of specific equipment. Other charges respondents mentioned include: pricing for half day/whole day, charges based on the number of people, and charges on the amount of space used.

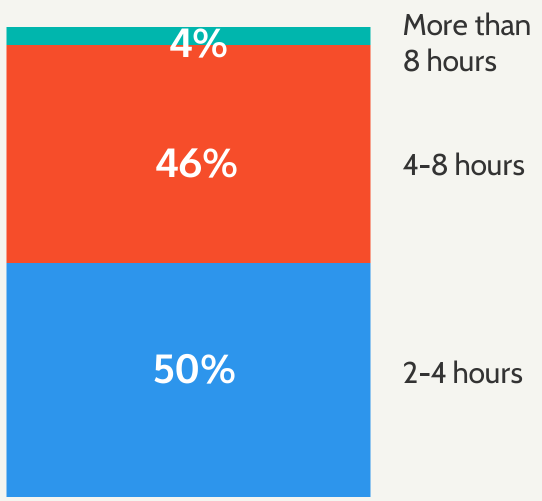
For your shared space, do you charge by the following?



Tenants Rent Sessions of 2-4 and 4-8 Hours

Respondents were mostly split between tenants renting blocks of time of 2-4 and 4-8 hours, with a small number who have tenants renting blocks of more than 8 hours.

What is the average block of time tenants/members will typically be in the facility in one session?



Discounted Rates Are Offered, Mostly For Renting More Hours

Many kitchens offer variable pricing on shared space rental rates for factors such as: the number of hours rented, peak and off-peak times, use of prep space only, tenants' income, size of operation, and non-profit pricing.

72% offer discounts for renting more hours

46% charge different rates based on the time of day (peak and off-peak times)

25% offer discounted rates for prep space only with no equipment use

6% offer discounts based on tenant's income

Other Factors Affecting Rates

- In-town vs. out-of-town residents
- Non-profit vs. for-profit tenant
- Size of operation
- Startup vs. established
- Community groups
- Incubator client vs. hobby/one-time clients

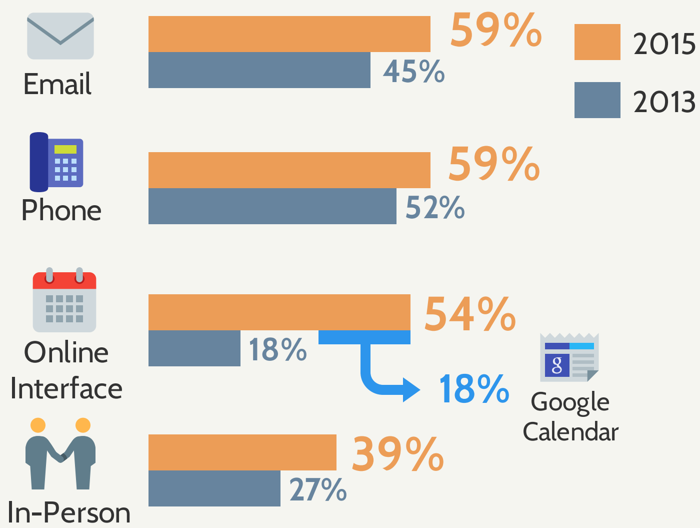
User Interface

While many traditional methods continue such as reserving space by phone and accessing facilities by key, kitchen incubators are making technological advances by offering online services for members and using digital entry to facilities.

Email and Phone Remain Most Common Ways to Reserve Space

Just over half of respondents manage reservations using an online interface such as Google Calendar, tripling in popularity since 2013.

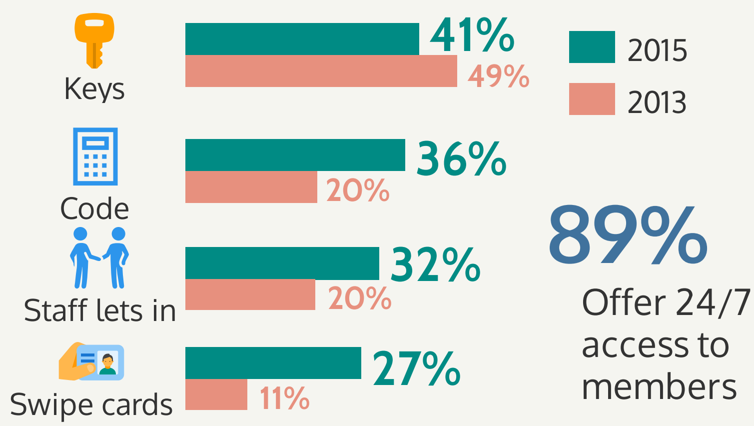
How do tenants/members reserve space?



Incubators Offer Flexibility in Accessing Facilities

Tenants most frequently access the facilities using keys, a code, or being let in by staff, but codes and swipe cards are on the rise as keys are used less frequently.

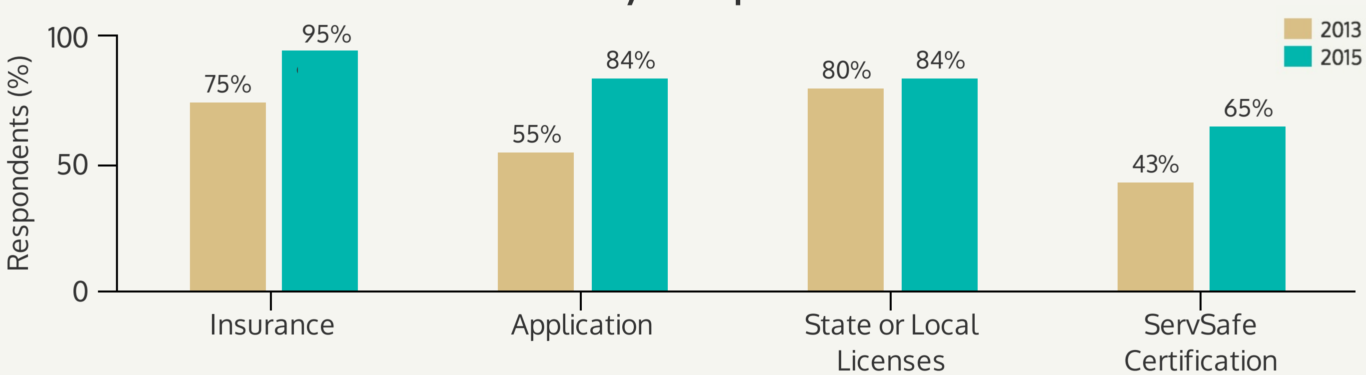
How do tenants/members access the facility?



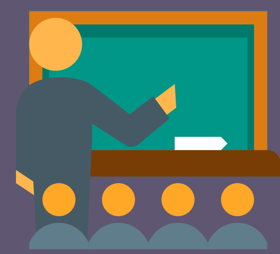
Most Require Formal Documentation for New Members

Documentation consists of formal paperwork such as insurance, applications, and licenses and certifications, while business-related items such as business plans, financials, and personal finances were requested by 25% or fewer of respondents. Requiring an application has become more common, rising from 55% in 2013 to 84% in 2015.

What documentation do you require for new tenants/members?



Business Support

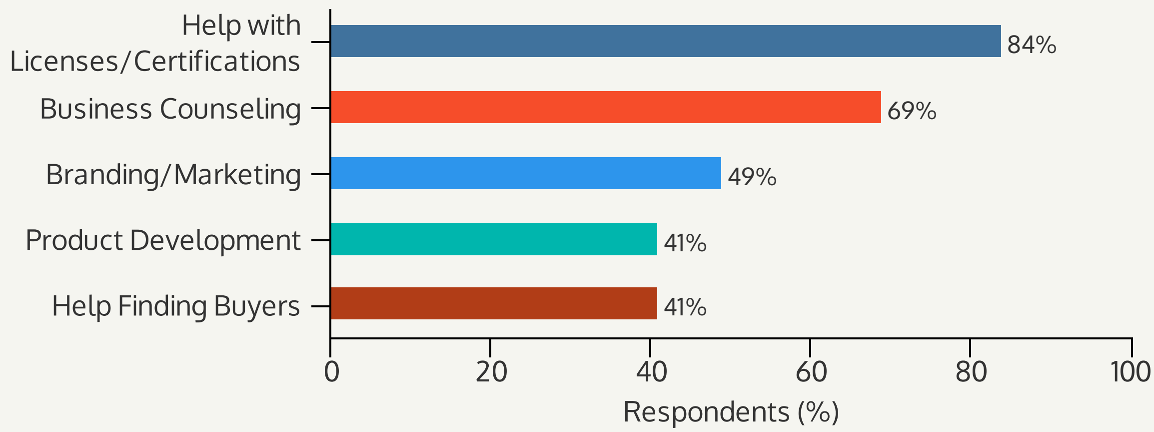


A core purpose of kitchen incubators is support for tenant businesses. Assistance with licenses and certifications, marketing, and business planning are among the top services offered and needed by tenants. About half of respondents track success outcomes, with job creation, product growth, and revenue growth as the most common.

Help With Licenses and Certifications and Business Counseling Are the Most Frequently Offered Services

Business services were reported as being offered both in-house and through outside partnerships. Other services at fewer respondents included: group ingredient purchasing (37%), help obtaining financing (33%), and distribution/logistics (31%).

What services do you provide your tenants/members?



Tenants Need Market Opportunities and Business Planning

Overall, apart from access to the kitchen space itself, tenants most need business assistance such as marketing and planning. Incubators with larger and smaller operating budgets had different priorities. Incubators with less than a $100,000 operating budget prioritize product development higher and incubators with greater than a $100,000 operating budget prioritize access to operating capital higher.

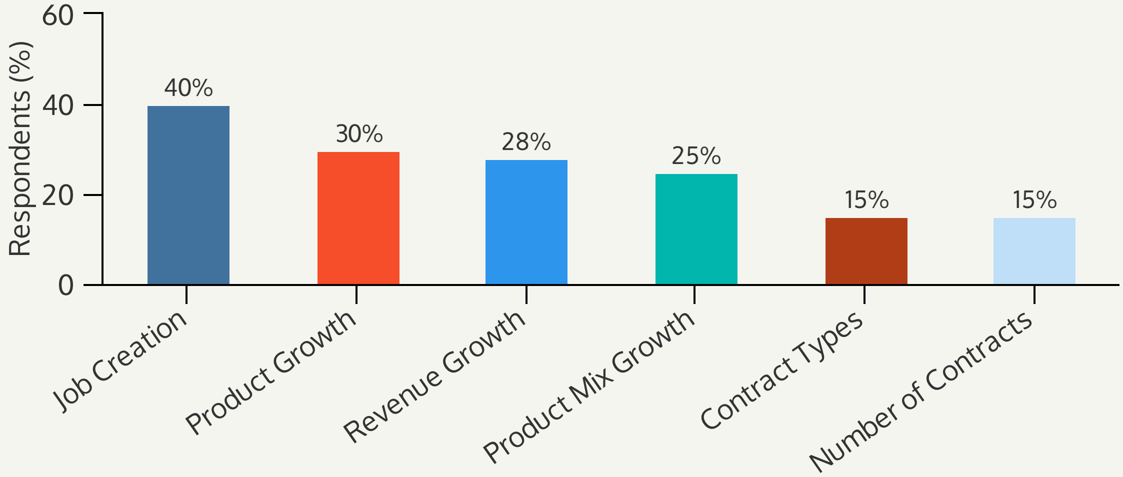
What are the greatest needs of your tenants/members?

#1 Access to Kitchen Space and Equipment
#2 Market Opportunities for Selling Product
#3 Business Planning
#4 Access to Affordable Ingredients
#5 Access to Operating Capital
#6 Product Development
#7 Distribution/Logistics

About Half Track Success Outcomes of Tenants

About 50% of incubators track at least one business progress outcome, similar to the rate in 2013. 80% of incubators that track one outcome track at least one other, as well.

What business progress outcomes do you track for your tenants/members?



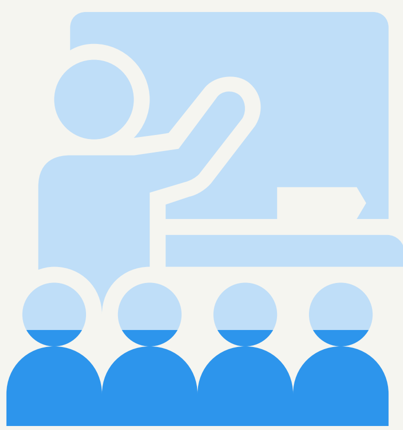
"We track this data only for clients who are specifically enrolled in our Incubator Membership program, not for people just renting kitchen time."

"We meet with members to discuss progress and growth."

"Our tracking is still very early and incomplete. We have trouble getting clients to complete surveys."

Almost One-In-Four Provide Job Training

23% of respondents report providing job training at the facility, similar to 29% of respondents in 2013. Trainings offered include operating commercial equipment, volume production, and product development. Culinary job training programs such as those run by the Catalyst Kitchen network exist but are more targeted at specific businesses and mission-based organizations than incubators.



23%
provide
job training

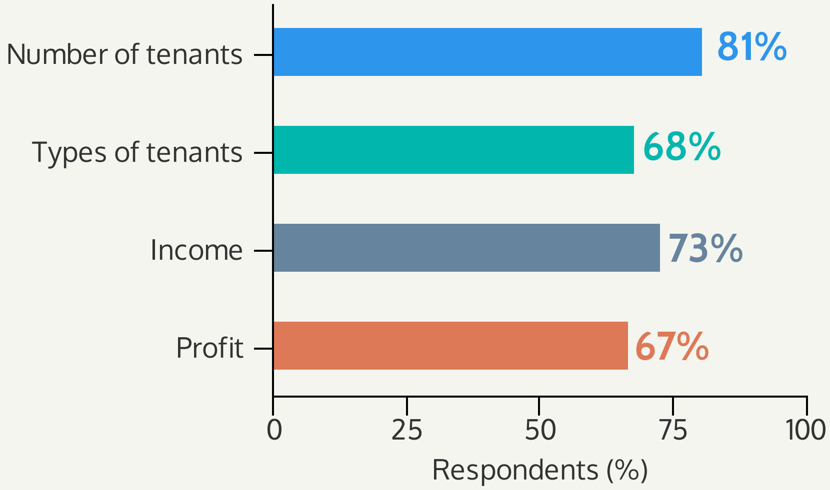
Trends and Challenges

Trends in the kitchen incubator industry point in the direction of more users, a wider variety of products, and a growing professionalism among food businesses and the operations themselves. Challenges remain, such as maintaining the facility and managing operations with lean resources.

Tenants Have Changed, Food Trucks Are Growing In Popularity, and Businesses Are Making More Specialized Products

Most respondents noticed changes in the past year in the number and type of tenants, as well as subsequent changes in income and profit. Several reported that their tenants are more familiar with the kitchen incubator model and are producing a greater variety of products, particularly from food trucks. The consensus seems to be that there is an increasing interest in kitchen incubators and a growing diversity of tenants renting space.

Have you noticed any changes over the previous year with the following?



- Tenants are more professional
- More understanding of the benefits of a commercial kitchen
- The food truck market is growing rapidly
- More variety of products
- More inquiries
- More tenants interested in making beverages
- More high end products
- Younger tenants
- Tenants need larger blocks of time

"In our first couple years, we accepted anyone who came through the door with an idea. Now we're much more committed to nurturing the growth of existing clients while identifying future clients who have strong growth potential / are more business savvy or at least coachable. We're also expanding and bringing on new clients."

"It does seem like they are getting more professional. People now look for commercial spaces where in 2011 no one knew about them. Not that they have money but they do realize that it takes money to start and operate a food business. I think it takes 4 plus years to get the idea across that they need a commercial kitchen space to work in. It was hard to convince people that they needed to pay for overhead that they weren't counting when they made at home."

Cleaning, Maintaining The Facility, and Finding New Customers Are The Greatest Challenges

Challenges related to cleaning and maintenance, managing tenants with small staffs, and earning, collecting, and spending money were common themes among respondents. Other issues involved finding skilled staff for the facility and attracting tenants with business skills to maintain a successful business.

What are your facility's greatest challenges?

"First year we had a small business anchor tenant so we had consistent capital. Now we have smaller, less consistent small business users, yet folks wanting to teach community classes or cooking classes have increased."

"The biggest challenge with an incubator will always be that you cannot increase revenues without creative programming. The whole point is to build up users and then get them out on your own. You are then left with a void of income which will take numerous smaller clients to make up. So if you are able to maintain the same amount of revenues from year to year then you are actually very successful."

"Money is always an issue. Maintaining the facility. Juggling the responsibility of 50 companies between 2 staff."

"Infrastructure and weather. We're in a location with old rising water tables, crazy blizzards, and buildings that are ill-equipped to air-condition in the scorching summer heat. Nuff said. But we love it."

Local Food Movement, Excitement About Incubators, and New Meal Delivery Concepts Among Other Recent Trends

What other trends/changes have you observed over the past few years?

- Mobile units / food trucks
- Local food movement
- Specialized foods, although some see these as fads that pass
- People needing and seeing value in incubator services
- Health awareness
- User collaboration and fun, creative spaces
- Pre-made meals
- New meal delivery concepts

"Shows like Shark Tank have allowed people to believe they can be entrepreneurs."

"We have increased the number of users that we have. There are more specialty users now, rather than predominately bakers and carts, we have more income due to more users and more use."

"We do see better prepared, higher quality of businesses come through. Area education has done a great job."

"Local, sustainable, "clean," "natural," allergen specific – all are rising trends. Fads rise and fall (cupcakes, jerky, pickling)."

"More people are looking for an income during retirement."

"Over the past eleven months, I've noticed that we've learned more, and that food entrepreneurs are awesome because they blew us away by showing an interest in our facility and turning it into one of the most unexpectedly creative and artistic spaces any of us have ever seen. We expected the shared kitchen to be a functional cash cow for our business to fund our forays into our own newfangled food production, but we're having much more fun cultivating those who are already making their own forays."

Appendix A
Methodology

In 2015, Econsult Solutions, Inc., in partnership with American Communities Trust and Urbane Development ("the project team"), conducted a 54-question survey of shared food facilities based on the original 2013 survey and refined based on lessons learned from the 2013 process, as well as trends in the marketplace that the project team wanted to track. Respondents were asked some survey questions using the same phrasing, while others changed based on past responses and to improve the clarity of the survey. In questions where the language was changed between surveys, the project team made best efforts to make comparisons in consideration of the changes. For questions that changed in a fundamental way, this report does not make a comparison between the 2013 and 2015 surveys.

Compiling the List of Shared Use Kitchens to Survey

The project team compiled a list of over 400 potential shared-use kitchens to survey using the 2013 survey recipients, kitchen incubator listing websites, and internet research on a list of key terms (below). The project team acquired email addresses and phone numbers for each facility.

Internet search terms used to create the list of facilities to survey were:

- kitchen incubator
- food incubator
- culinary incubator
- culinary kitchen incubator
- incubator kitchen
- test kitchen incubator
- kitchen accelerator
- food business incubator
- food business accelerator
- shared food manufacturing facility
- shared kitchen
- shared commercial kitchen
- shared production space
- shared-use kitchen
- shared-use commercial kitchen
- food innovation center.

This list was then refined to include only facilities in operation whose primary use was a shared kitchen. Businesses removed from the list included restaurants and caterers who rented out their kitchens when not in use and demonstration kitchens. In the end, the project team had a list of over 250 shared-use food facilities.

Surveying

The project team entered the survey into Survey Monkey and tested it for clarity and completion time. In July 2015, survey recipients received an email explaining the purpose of the survey and providing a link. Over the next two weeks, recipients who had yet to respond were contacted by phone and email to follow-up.

At the conclusion of this process, 61 food facilities (including ten who participated in the 2013 survey) responded to the survey, resulting in a 24% response rate. All responses were treated with confidentiality. Not all respondents answered each question and the following is a select reporting of survey data.

Appendix B

List of U.S. Kitchen Incubators

	Incubator Name	Location
Alabama	Chef's Workshop	Birmingham, AL
	Shoals Entrepreneurial Center	Florence, AL
Arizona	Arizona Commercial Kitchen	Gilbert, AZ
	Chef's Shared Kitchen	Scottsdale & Mesa, AZ
	Kitchen CoOp	Prescott, AZ
	Wilbur's Bakery	Phoenix, AZ
California	APC Commercial Kitchen	Alameda, CA
	Bay Area Kitchen Rental	Fremont, CA
	Chefs Center of California	Pasadena, CA
	Cooking Block	Redlands, CA
	CSS Turlock	Turlock, CA
	Culiflex Kitchens	Orange, CA
	East End Kitchen	Santa Ana, CA
	El Pajaro	Watsonville, CA
	Extra Kitchen.com	Santa Cruz, CA
	Foodworks Culinary Center	Arcata, CA
	Foothill Kitchen	Upland, CA
	Just Call Us	San Diego, CA
	Kitchen by the Hour	Hayward, CA
	Kitchen Town	San Mateo, CA
	Kitchen@812	Pinole, CA
	L.A. Prep	Los Angeles, CA
	La Cocina	San Francisco, CA
	LGI Kitchen Rental	Fullerton, CA
	Mr. C's Kitchen Rentals - #1	Campbell, CA
	Peninsula Kitchen Rental	Redwood City, CA
	Rotary Community Kitchen	St. Sonoma, CA
	Sae Kitchen Rental	Vista, CA
	San Jose Kitchen Rentals	San Jose, CA
	Shared Commercial Kitchen	El Cajon, CA
	Shared Kitchen Rentals	San Diego, CA
	Summit Kitchen	Ventura, CA
	The Hood Kitchen Space	Costa Mesa , CA
	The Kitchen Station LLC	Temecula, CA
	The Kitchen Terminal	Redondo Beach, CA
	Unit 120	Los Angeles, CA

Note: The project team made best efforts to identify known operating kitchen incubators through the methods described in Appendix A, but this research may have missed some facilities and/or some incubators listed may have closed.

	Incubator Name	Location
Colorado	Back to Basics Kitchen	Broomfield, CO
	Bolder Natural Foods, LLC	Denver, CO
	Boulder Kitchen Share	Boulder, CO
	Business Incubator Center Kitchen	Grand Junction, CO
	Colorado Kitchen Share	Denver, CO
	Elizabeth Commissary	Elizabeth, CO
	Kitchen Network	Denver, CO
	Larimer 35	Denver, CO
	Mile High Co-pack	Aurora, CO
	Rocky Mountain Commissary	Arvada, CO
	Salad Ground Kitchen Share	Boulder, CO
	The Kitchen Coop	Broomfield, CO
	ZZ's Commissary	Denver, CO
District of Columbia	Eats Place	Washington, DC
	Mess Hall	Washington, DC
	Union Kitchen	Washington, DC
Delaware	Delaware Kitchen Share	New Castle, DE
	DSU Food Incubator Center	Dover, DE
Florida	Ez Pro Kitchen, LLC	Tampa, FL
	My Rent a Kitchen	Clearwater, FL
	Secret Garden Cafe at the Green Market	Boynton Beach, FL
	Shared Kitchen of Tampa	Tampa, FL
	Tampa Bay Kitchen	Tampa Bay, FL
	Your ProKitchen	Largo, Naples, FL
Georgia	24-7 Shared Kitchen	Lawrenceville, GA
	PREP Cook	Atlanta, GA
	Shared Kitchens	Marietta, GA
	The Edge Kitchen	Kennesaw, GA
Hawaii	Pacific Gateway Center	Honolulu, HI
Idaho	Food Technology Center @ UIdaho	Caldwell, ID
Illinois	CFC Kitchen	Frankfort, IL
	Dream Kitchen	Elgin, IL
	Eta's Commercial Kitchen rental	Highland Park, IL
	Good Food Business Accelerator	Oak Park, IL
	Kitchen Chicago	Chicago, IL
	National Foodworks Services LLC	Decatur, IL
	NWC Food Incubator	Evanston, IL
	River Forest Kitchen	River Forest, IL
	SAAGE Culinary Studio	Naperville, IL
	Share A Kitchen	Elk Grove Village, IL
	Trinity Kitchen Share	Chicago, IL
	United Kitchen	LaGrange, IL
Indiana	Cook Spring Fort Wayne	Fort Wayne, IN
	Indy's Kitchen	Indianapolis, IN
	Nana Clare's Kitchen	Valparaiso, IN

	Incubator Name	Location
Kansas	Glacial Hills Food Center	Horton, KS
Kentucky	Northern Kentucky Incubator Kitchen	Covington, KY
	The Hatchery	Newport, KY
Louisiana	Edible Enterprises	Norco, LA
Massachusetts	33 South Street	Somerville, MA
	Berkshire Harvest Rental Kitchen	Lee, MA
	CommonWealth Kitchen	Dorchester, MA
	CTI Shared-use Commercial Kitchen	Lowell, MA
	Darmouth Grange - Grange Kitchen	Dartmouth, MA
	Kitchen Inc	Somerville, MA
	Kitchen Local	Amesbury, MA
	Stock Pot Malden	Malden, MA
	Western MA Food Processing Center	Greenfield, MA
Maryland	Chesapeake Culinary Center	Denton, MD
	Greenbelt Community Center Kitchen	Greenbelt, MD
	Kitchen Rentals	North Bethesda, MD
	Supreme Caterer Rentals	Rosedale, MD
Michigan	Can-Do Kitchen	Kalamazoo, MI
	Detroit Kitchen Connect	Detroit, MI
	Downtown Market Incubator Kitchen	Grand Rapids, MI
	Facility Kitchens	Lowell, MI
	Flint Food Works	Flint, MI
	Grow Benzie Incubator Kitchen	Beulah, MI
	Kitchen 242	Muskegon, MI
	Niles Entrepreneur and Culinary Incubator	Niles, MI
	Proud Mitten Shared Kitchen and Bakery	Plymouth, MI
	The Culinary Studio	Southfield, MI
	The Menagerie	Pontiac, MI
	The Starting Block	Hart, MI
Minnesota	Clair Nelson Community Center	Finland, MN
	GIA Kitchen	Saint Paul, MN
	Harmony's Community Kitchen	Bemidji, MN
	Kindred Kitchen	Minneapolis, MN
Missouri	Begin New Venture Center	St Louis, MO
	Culinary Connection Kitchen Rental	Columbia, MO
	Farm to Table Kitchen	Kansas City, MO
	Independence Regional Ennovation Center	Independence, MO
Montana	Glendive Food and Ag Development	Glendive, MT
	Center	Ronan, MT
New Jersey	Rutgers Food Innovation Center	Bridgeton, NJ
New Mexico	Mixing Bowl Kitchen	Albuquerque, NM
	South Valley Economic Development Center	Albuquerque, NM
Nevada	4D Commisary	Las Vegas, NV
	One World Kitchen	Sparks, NV

State	Incubator Name	Location
New York	A Taste of Long Island NY	Farmingdale, NY
	Battenkil Kitchen Inc	Salem, NY
	Bed-Stuy Kitchen	Brooklyn , NY
	Brooklyn FoodWorks	Brooklyn, NY
	City Cookhouse	Manhattan, NY
	Cook and Bake Center	Mamaroneck, NY
	Entrepreneur Space	New York, NY
	Hana Kitchens	Brooklyn, NY
	Hometown Foods, LLC	Kinderhok, NY
	Hot Bread Kitchen	New York, NY
	Mi Kitchen es su Kitchen	New York, NY
	NYC Commercial Kitchen	Bronx, NY
	Organic Food Incubator	Long Island City, NY
	Shared Vegetarian Kitchen	Buffalo, NY
	Taste Buds Kitchen	New York, NY
	Union Food Lab	New York, NY
	WHEDco's Urban Horizons Kitchen	Bronx, NY
North Carolina	Blue Ridge Food Ventures	Asheville, NC
	Burgaw Incubator Kitchen	Burgaw, NC
	Carolina Commercial Kitchen	Charlotte, NC
	Eastern Carolina Food Ventures	Warsaw, NC
	Essers Commissary	Durham, NC
North Carolina	Piedmont Food and Agricultural Processing Center	Hillsborough, NC
	The Cookery	Durham, NC
	The Kitch	Charlotte, NC
North Dakota	Square One	Fargo, ND
Ohio	ACEnet's Food Ventures Center	Athens, OH
	Common Wealth Kitchen Incubator	Youngstown, OH
	Food Fort at ECDI	Columbus, OH
	Muskingham	Zanesville, OH
Oklahoma	Earth Elements Entrepreneurs' Kitchen	Oklahoma City, OK
	Kitchen 66	Tulsa, OK
	REI Oklahoma	Durant, OK
Oregon	Renegade Kitchens LLC	Salem, OR
	Sprout	Springfeild, OR
	Umpqua	Roseburg, OR
Pennsylvania	Anna's Commercial Kitchen	Allentown, PA
	Center for Culinary Enterprises	Philadelphia, PA
	East Side Community Kitchen	Lancaster, PA
	Kitchen Incubator at CTTC	Carbondale, PA
	YorKitchen	York, PA
Rhode Island	Hope and Main	Warren, RI
South Carolina	Coastal Kitchens	Goose Creek, SC
	Colleton Commercial Kitchen	Walterboro, SC

	Incubator Name	Location
South Carolina	DERkitchen	Columbia, SC
	Naked Kitchen	Greenville, SC
Tennessee	Chatt-Town Kitchen	Chattanooga, TN
	Grow Local Kitchen	Nashville, TN
	The Cooks' Kitchen	Nashville, TN
Texas	Capital Kitchens	Austin, TX
	Culinary Kitchen & Beyond, LLC	Dallas, TX
	DBD Commissary	Austin, TX
	Elixir Kitchen Space	Fort Worth, TX
	Hour Kitchen	Garland, TX
	Just Add Chef	Austin, TX
	Perfect Temper Kitchen	Plano, TX
	The Culinary Factory	Austin, TX
	The Green Cart Kitchen	Austin, TX
	The Kitchen Space	Austin, TX
	Z's Café Kitchen Incubator and Commissary	Fort Worth, TX
Utah	CBRC Kitchen	Logan, UT
	Spice Kitchen Incubator	Salt Lake City, UT
	USU Incubator Kitchen	Logan, UT
Virginia	Flavor Commercial Kitchen	Charlottesville, VA
	Frontier Kitchen	Lorton, VA
	Kitchen Share	Henrico, VA
	Kitchen Thyme	Richmond, VA
	Lavender House & Community Kitchen	Virginia Beach, VA
	Prince Edward Cannery and Commercial Kitchen	Farmville, VA
	Spencer Penn Community Kitchen	Spencer, VA
	The Highland Center Incubator Kitchen	Monterey, VA
Vermont	Hardwick Agriculture (Vermont Food Venture Center)	Hardwick, VT
Washington	Farm Kitchen	Poulsbo, WA
	From the Farm Bake Shop & Commercial Kitchen	Burlington, WA
	Kitchen Spokane	Spokane, WA
	Memorable Events and Catering Commissary Kitchen	Ferndale, WA
	Non Profit Commercial Kitchen	Snohomish, WA
	The Culinary Cooperative	Lynnwood, WA
Wisconsin	Courthouse Kitchens of Green Lake LLC	Green Lake, WI
	Farm Market Kitchen	Algoma, WI
	FEED Kitchens	Madison, WI
	Food Enterprise Center Kitchens	Viroqua, WI
	Kickapoo Culinary Center	Gays Mills, WI
	NWTC: Woodland Kitchen & Business Incubator	Niagara, WI
	Recipe For Success: Halo Incubator Kitchen	Racine, WI
	Sharing Spaces Kitchen	Prairie du Chien, WI
	The Village Hive: Bakery and Local Food Collective	Amherst, WI
	Watertown Farm Market Kitchen	Watertown, WI