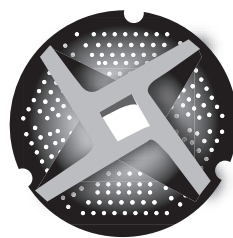




June 2018

Niche Meat Processor Assistance Network at 10 years

Connection, Community, and Peer
Problem-Solving for a Thriving
Niche Meat Processing Sector



**NICHE MEAT PROCESSOR
ASSISTANCE NETWORK**

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Too often, very small processors feel like they're alone out here; like no one else understands and lives our challenges. It's a rough business to make work; it can be a highly stressful business, economically and bureaucracy-wise. NMPAN matters because it shows that together we do have a voice. It shows us that other people are living the same thing.

- Producer/processor

Executive Summary



USDA co-packer Alleghany Meats in Monterey, Virginia. Credit: NMPAN

What is NMPAN?

The Niche Meat Processor Assistance Network (NMPAN) is a national network and community of practice focused on building and sustaining the processing infrastructure essential to the local and regional niche meat sectors. Members include meat processors, livestock producers, meat brands, suppliers, universities, public agencies, and nongovernmental organizations (NGOs). NMPAN is a peer learning community, a national information hub, and a valued source of targeted applied research and direct technical assistance.

The network's mission is to strengthen and expand slaughter and processing capacity, nationwide, for "niche" meats, such as locally

grown, certified organic, grass-fed, no antibiotics/added hormones, and humanely raised. To do this, NMPAN not only supports processors themselves but aims to improve communication and coordination with livestock producers, meat buyers, and all other links in the supply chain. In turn, this benefits the livestock and poultry producers, buyers, and other stakeholders engaged in making meat and poultry more sustainable.

NMPAN combines peer learning with an online information hub. Its core programs include a 1,200 member listserv, a resource-rich website, webinar series, peer consulting network, and applied research and technical assistance on a range of topics, from business planning to plant operations to regulations and more. NMPAN

has two part-time staff, a 12-member Advisory Board, and an annual budget of \$140,000. It is a Cooperative Extension-based network, housed at Oregon State University, and part of the national “eXtension” system.

History

NMPAN was launched in 2008 by Lauren Gwin and Arion Thiboumery. Their goals were to build a network of technical experts and advisors, backed by a comprehensive resource database and learning community, to support niche meat processors and the producers and consumers who depend on them.

10-Year Assessment

To mark a decade of operations, NMPAN conducted a ten-year review in early 2018 to assess its effectiveness to date and adapt for the future. The review included:

- ▶ An online survey of listserv members (135 participants; 11 percent of total listserv)
- ▶ An online survey of the Advisory Board
- ▶ In-depth interviews with 15 niche meat supply chain stakeholders.

A total of 161 people participated in the assessment, including processors, producers, brand/distributors, consultants, extension agents, NGOs, chefs, and equipment/supply companies. Some respondents wear multiple hats, as producer/processors, for example. Respondents were geographically diverse, coming from every region of the U.S. and at least three other countries.

Key Findings

*“NMPAN remains a gold standard.” –
Nonprofit partner*

The primary takeaway from this assessment is that NMPAN is a successful and useful community. NMPAN members and stakeholders feel satisfied and empowered by their participation. They are



On-farm poultry processing set up. Credit: Harvey Ussery

not looking for major changes in operations or focus areas. Key findings include:

- ▶ NMPAN has achieved its original goals of building a national community of practice and a respected, robust resource hub. Relationships and easy access to knowledge are the most valued outcomes of the network, and the 1,200-member listserv, website, and webinars are its most used tools.
- ▶ NMPAN’s biggest challenge is that demand for its services exceeds current capacity. Many members would like to see NMPAN to do more things for more people.
- ▶ Changes in the meat industry as a whole, and the evolution of the niche meat sector in

particular, will continue to present challenges to NMPAN members. Respondents perceive that the niche meat sector is gradually becoming more consolidated, bifurcated, and specialized, which creates difficulties including: an increasingly complex regulatory environment, which can present barriers to beginning or expanding a business; labor – not just skilled, but any – is increasingly hard to come by; concerns about small business profitability and long-term viability. Enhanced communication and collaboration with other organizations is essential to understand and address these challenges more comprehensively while determining the best role that NMPAN can and should play.

Accomplishments

NMPAN is “invaluable” in creating community and connecting people in what can otherwise be a small and isolated field. The network is tremendously successful at facilitating relationships, collaboration, and information exchange between people who otherwise might not meet, including giving new and aspiring processors access to experienced processors.

NMPAN provides access to a wealth of knowledge and information, whether in resources collected on the website, in webinars, or through the collective wisdom of the listserv community. Processors and non-processors alike said that if they have a question, NMPAN likely has the answer.

When asked how well NMPAN is “meeting its mission,” stakeholder respondents gave an average of 4.4 of 5. Those who provided a score of less than 5 did so because they appreciate the network’s existing work and would like it to do more. 87 percent of listserv survey respondents (115 out of 135) consider the network achieving its mission “moderately well” to “very well.”

As noted above, one of NMPAN’s core principles is that increased coordination and communication between livestock producers and processors – and also between processors and meat buyers further along the supply chain – are essential to processor viability. This requires mutual understanding of each other’s roles, capacities, and constraints. Respondents were asked if, over the last decade, non-processors have an improved understanding of the role of processors and processing in the supply chain. While there was no clear consensus (see full report for specific responses), NMPAN does appear to have helped make processing “less of a black box.”

For example, as one meat company explained, “The better we can understand the challenges the processor is facing, the more smoothly we can work with them. . . and make fewer unreasonable demands.” At a broader level, participation in NMPAN has also opened the “box” for sustainable agriculture advocates, informing their policy choices and recommendations.

NMPAN surveys its membership annually and included many of those questions in the survey for this evaluation. Responses reflect NMPAN’s clear value for businesses and other stakeholders:

“NMPAN has...” [check all that apply]	%
increased my awareness about regulatory compliance and where to find answers	67%
increase my understanding of meat supply chain and local meat processing	53%
increased my knowledge about good business practices	45%
increased my openness to learning and hearing from others	43%
renewed my sense of excitement to be in this industry	35%
changed how I do business or led to new business opportunities	21%



Well packaged pasture-raised chicken processed under federal exemption. Credit: Alicia Jones

Areas for Improvement

► NMPAN is not reaching all the people it could be and should do wider outreach. Illustrating a point made by many survey respondents, in a room of approximately 60 meat processors at a recent regional conference, only four were members of the NMPAN listserv. Custom and retail butchers, in particular, are not well represented in the network.

► NMPAN has some important questions to consider about its listserv. The listserv and its community were consistently cited as the most valuable element of NMPAN, but there are also concerns. Some processors, in particular, would like to have a more dedicated space to talk exclusively to other processors. The network has always included start-up processors, farmers and ranchers, NGO representatives, and others who may seem to experienced processors to be asking tangential questions and not have expertise to contribute to other people's inquiries. On the other hand, other respondents would like to see more links in the supply chain (e.g., renderers, plant designers/engineers, equipment suppliers, brands and distributors) represented on the listserv and in other resources. The question for

NMPAN is how to balance the need to facilitate expertise in conversations while also continuing to include a 360-degree view of the niche meat supply chain.

"We have met a lot of great operators and marketers through being associated with NMPAN." – mid-scale processor

► The State Affiliate program is not well utilized. Many contacts are out of date, website links are broken, or the people identified are not well versed in the niche meat space. The program should be reinvigorated or dropped.

What's Next?

Respondents want NMPAN to keep doing what it has been doing and do more. "More" includes:

► Broader outreach to a wider audience and more partnerships with both similar groups and with additional links in the supply chain. For example, a regional meat company that aggregates from multiple producers wants to see an NMPAN for their type of business. "We as regional players will increasingly depend on platforms like NMPAN

where these conversations have already started, to connect in other ways to create efficiency ... and have exposure to the great ideas.”

► More content on regulations, labor, and business viability/profitability. NMPAN already has considerable resources on these topics, but some material should be updated or made more accessible, including presenting more of it via video. The requests for this information could also indicate that is not obvious on the website, which is not as user friendly as it could be, and that NMPAN could do additional regular outreach within the network to remind members what resources are available.

The feedback from the assessment stimulates critical thinking about what both NMPAN and others are and could be doing more effectively. The actors and organizations in the niche meat space have changed since NMPAN began 10 years ago, and NMPAN could strengthen communication and collaboration with them. Potential enhanced and new partnerships could include American Association of Meat Processors, state and regional meat processor associations, college meat cutting programs, state meat and poultry inspection programs, and state departments of agriculture. NMPAN has connections with most of these already – for example, NMPAN joined AAMP shortly after its 2008 launch – but they could be expanded.

“The more open you can be about what you do and show people what you do, you’ll grow – and the whole industry will grow.” – Processor

In addition, the meat industry as a whole has evolved in the last ten years. On the one hand, demand and supply of niche meat and poultry have continued to grow, and value chain capacity

– not just processing, but distribution and marketing as well – has grown, albeit unevenly. This is a positive development but comes with challenges, including concerns about market and consolidation pressures from the conventional meat industry; increased regulatory pressure that can disproportionately burden smaller processors; and the durable challenges of labor: both finding skilled labor and coping with the aging-out of processors without succession plans, much as is happening across the agricultural sector.

Conclusion

“The website has been a great resource for case studies and actual ideas and mapping plans.” – small-scale processor

NMPAN is a national information hub and peer learning community for people, businesses, and organizations around the country working on challenges and opportunities related to the critical role of processors in the local, regional, sustainably-raised meat and poultry sector. The primary takeaway from this assessment is of a successful, useful network. Its members and stakeholders feel satisfied and empowered by their participation and are not looking for major changes in NMPAN operations or focus areas. In its next ten years, NMPAN can increase its value and impact by expanding its reach, building on existing partnerships and creating new ones, and developing additional programming on the durable challenges facing this industry

“NMPAN has been critical to the National Sustainable Agriculture Coalition’s work on livestock, meat processing, and food safety issues. – NSAC Senior Strategic Advisor”

1. Introduction



Small Plant Stakeholder Meeting with USDA-FSIS, hosted by NMPAN and NSAC, Oregon, October 2017. Credit: NMPAN

The Niche Meat Processor Assistance Network (NMPAN) was launched in 2008 by its current director, Lauren Gwin, and previous co-director Arion Thiboumery. Over years of work and conversations with processors, producers, and others, they saw the need for a space to share information on small-scale meat and poultry processing to meet growing demand in specialty meat markets. Ten years later, NMPAN has successfully filled that need, providing both practical resources and building a strong community of practice that many have come to rely on.

To mark this anniversary, NMPAN has conducted a ten-year review to assess its effectiveness, track changes in the sector, and adapt for the future. This assessment is based on in-depth interviews with 15

industry stakeholders as well as online surveys of listserv members and the Advisory Board.

Results show that NMPAN has achieved its goal of building a resource hub and a national community of practice. Respondents find NMPAN “invaluable,” particularly for the community and access to resources and support that it has created in an otherwise fairly small, isolated field. The 1,200-member listserv, website, and webinars are the most used services. The network’s biggest challenge is that demand for its services exceeds current capacity. Many members would like to see NMPAN to do more things for more people, including broadening its reach through greater outreach and more partnerships, and additional focus on regulations, labor, and business viability.

Ten-year Review Methodology

One-on-one interviews were conducted with 15 stakeholders from January to March 2018. Respondents and their affiliations are listed in Appendix I. Several of these wear multiple hats, as, for example, both producer and processor.

Fields represented:

Processor: 6

Producer: 4

Brand/Distributor: 3

Consultant: 3

Extension: 1

Non-governmental organization (NGO): 2

Other (including state meat inspection staff, co-

op manager, trade group manager, former head of livestock processing association): 4

Respondents are located in CA, IA, IN, ME, MN, MO, NC, NM, NY, PA (2), VA (2).

This assessment is also informed by written surveys of both the NMPAN listserv and the organization's Advisory Board. 135 listserv members completed the survey, or just over 11 percent of the 1,200-person membership. 11 of 12 Advisory Board members responded to a separate survey.

Questions for all three surveys are in Appendix II. Questions were similar among the surveys. The written surveys included both multiple choice questions and areas for more detailed responses.

2. Background



USDA co-packer Heritage Meats in Rochester, WA. Credit: NMPAN

History of NMPAN

In 2007, after completing research on barriers to scale in the sustainable beef sector and spending several years tracking local meat processing-related projects in California and nationally, Lauren Gwin, now the director of NMPAN, saw the need for a national working group to share information and best practices on small-scale meat and poultry processing serving local producers and markets. In exploring the concept, she connected with Arion Thiboumery, then a graduate student at Iowa State University, who had created a working group of small-scale processors in Iowa along similar lines. Together they developed the idea for what became

the Niche Meat Processor Assistance Network.

In an August 2007 planning document, they laid out goals for what they then called the “Small-scale Meat Processing Infrastructure Technical Assistance Project.” Long-term goals included:

- Design, create, and maintain a comprehensive set of resources (guides, planning tools, templates, cadre of consultants, trainings, mini-grants, networking opportunities), nationally relevant but locally adaptable, for anyone who wants to build, expand, upgrade small and mid-sized meat processing facilities (slaughter and fabrication).

► Identify and train a “Project Affiliate” in each state, a point person who knows the ins and outs of his/her state’s regulations and resources and could offer guidance to people in that state.

NMPAN was officially launched at the Sustainable Agriculture Research and Education (SARE) national Conference in Kansas City, Missouri, in March 2008. A one-pager set out the following:

Mission: Strengthen and expand slaughter and processing capacity, nationwide, for niche meats – such as locally grown, certified organic, grass-fed, no antibiotics/added hormones, and certified humane.

Approach: Build a network of technical experts and advisors, backed by a comprehensive resource database, to improve support for niche meat processors and the producers and consumers who depend on them.

Level A: Communication between assistance providers (national)

Level B: Communication between assistance providers, processors, producers, and others (local and regional)

NMPAN Today

“It remains a gold standard.” –Nonprofit partner

In ten years, NMPAN has realized and exceeded these goals, as well as added new ones as it adapts to the interests of the community of practice.

Today it is a national network of processors, producers, universities, agencies, and non-governmental organizations (NGOs) creating and supporting appropriate-scale meat processing infrastructure for niche meat markets. NMPAN coordinates, shares, and develops new information

and resources to improve access to processing infrastructure essential to the local and regional meat sectors. NMPAN’s goal is profitability and long-term viability for both processors and the producers who depend on them to market sustainably-raised meats.

NMPAN is part of the national Cooperative Extension System, through the eXtension initiative, and has been housed at Oregon State University since 2008. The NMPAN team is comprised of Director Lauren Gwin, Program Manager Rebecca Thistlethwaite, and a 12-member Advisory Board, drawn from industry, academia, NGOs, and government.

“We have met a lot of great operators and marketers through being associated with NMPAN.” – mid-scale processor

NMPAN is primarily a virtual network, based on email and the Internet. Its backbone is a 1,200-member listserv, with nearly 1,500 topics discussed since its inception in 2009. NMPAN produces a monthly newsletter, distributed to the listserv and other audiences by way of partner organizations. The NMPAN website (<http://www.nichemeatprocessing.org/>) has more than 20,000 hits monthly, and contains a wealth of information on getting started in meat processing, plant construction, running a processing facility, regulations and food safety, mobile slaughter, and much more. NMPAN hosts quarterly webinars on relevant and timely topics, often with processors as speakers. Webinars have an average attendance of 60 people, but viewership often grows exponentially once they are put on YouTube: a series of NMPAN webinar videos on mobile slaughter range from 44,000 to 175,000 views; others have from 100 to 22,000 views, depending on the topic. The NMPAN YouTube channel has more than 555 subscribers and 38 videos.



Cattle grazing California grasslands. Credit: Steve Quirt

What is “niche meat”?

The NMPAN website defines niche meat as: “locally-raised, certified organic, grass-fed, no hormones or antibiotics, certified humane.” Niche meats are often sold directly to consumers or into local and regional distribution systems. Niche meat processors are those who slaughter and butcher meat for farmer customers (called co-packing) or who slaughter or process for small brands and retailers, or some combination. Some niche meat processors are also producers who process only meat they raise, while others process both their own animals and those from other farmers. Some process wild game and other non-amenable species, such as bison, elk, or rabbit. Some niche meat processors do slaughter only, butchering only, further processing only, or a combination. As noted on the website, “we use ‘niche’ very broadly to refer to many types of market differentiation.”

Ten Years in the Niche Meat Sector

“The more open you can be about what you do, show people what you do – you’re going to grow, and the whole industry will grow.” –Processor trade group director

The ten years of NMPAN’s operation have corresponded with big changes in the natural/

organic food sector as a whole. Michael Pollen’s *The Omnivore’s Dilemma*, often seen as a tipping point for the local food movement, was published in 2006. “Locally grown produce” was the number two hot restaurant trend that year, according to an annual survey by the National Restaurant Association, and “grass-fed” was in the survey’s top 20. In the years since, broadly defined local/sustainable/organic foods have become much more than a trend. The Organic Trade Association reports that organic food sales grew by 8.4 percent in 2016, compared to 0.6 percent growth in the overall food market, while organic meat and poultry sales grew 17 percent in 2016 to \$991 million. Forty-four percent of chefs in a 2016 National Restaurant Association survey identified local sourcing as the culinary trend that has grown the most in the last decade and 13 percent pointed to environmental sustainability. Conscious eating appears here to stay: 41 percent of those chefs predict environmental sustainability will be the “hottest menu trend” in 2026, followed by 21 percent predicting local sourcing.

“Every time we had a crisis... having NMPAN as a resource is amazing.” – grass-fed beef producer and aggregator

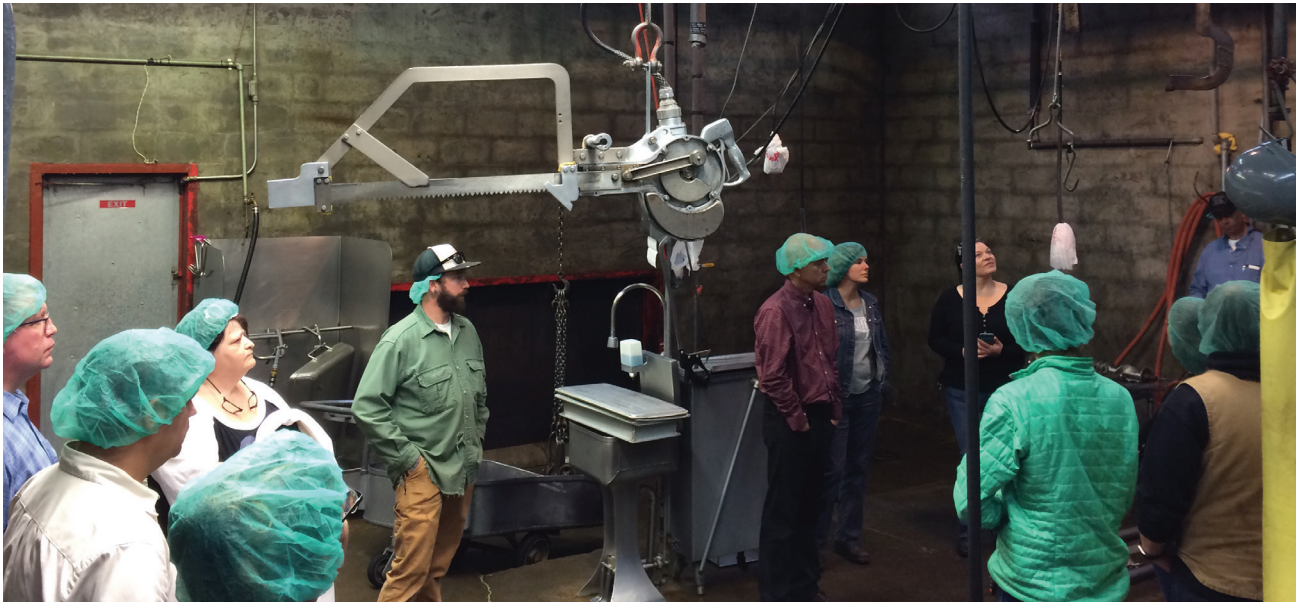
Putting numbers on just how the niche meat sector has changed in response to that demand over the last decade is a more challenging proposition. While the U.S. Department of Agriculture (USDA) produces volumes on conventional meat and poultry production and slaughter, its data on niche meat are spotty at best. In lieu of federal data, a 2017 report by Stone Barns Center for Food and Agriculture on the market for grassfed beef provides some insights. According to the report, retail sales of labeled fresh grassfed beef grew from \$17 million in 2012 to \$272 million in 2016, doubling every year. An estimated 3,900 producers finished grassfed cattle in the U.S. in 2017, up from about 100 producers in 1998. They finish an estimated 232,000 head of grassfed cattle for slaughter annually. While this accounts

for a miniscule proportion of the 30 million cattle slaughtered every year in the US, the growth of grassfed production is impressive given the overall decline in national per capita beef consumption, which fell more than two percent every year from 2006 to 2015.

Despite the decline in beef consumption, U.S. meat and poultry production overall have grown steadily in the last 25 years. Commercial red meat production increased 25 percent from 1990 to 2015 and poultry nearly doubled. Production continues to be dominated by ever-fewer players in increasingly vertically integrated supply chains. The last 25 years

have also seen a decline in both federally inspected and non-federally inspected slaughter plants around the country, reflecting a response to the 1996 implementation of the Hazard Analysis and Critical Control Point (HACCP) food safety protocols, larger patterns of industry consolidation, a decline in small and mid-sized livestock and poultry producers that would use these plants, and other factors. Since 1990, federally inspected establishments have decreased by 36 percent, from 1,268 to 808 in 2016. Non-federally inspected establishments declined 42 percent from 3,281 in 1990 to 1,910 in 2016.

3. Evaluation Findings



Tour of Revel Meats in Canby, Oregon. Credit: NMPAN

How has the industry changed?

In the decade of NMPAN's existence, demand for niche meat has increased while the meat industry as a whole has changed. The 15 NMPAN stakeholder respondents were asked for their take on the changes in the last 10 years for both their business and the sector. All discussed the growth of the local food and niche meat market, considering it a positive trend, either for their specific business or for the sector at large. Some also discussed concerns, including:

- Big meatpackers are now offering some types of niche meat, which creates downward price pressure for smaller players. At the same time, consumer

interest in sustainable meat and poultry does not necessarily mean consumers understand the higher costs and are willing to pay higher prices. And even when consumers are willing to pay, distributors or wholesalers are not and act as restrictive gatekeepers between producer/processor and consumer.

- Processors face a lack of skilled labor and a tighter regulatory environment, in which small plants can face disproportionately higher costs of compliance than large plants.

- Some producers feel that there are still not enough processors or enough doing the kind of processing they may be looking for, causing an ongoing bottleneck for the growth of their meat businesses.

- For the growing number of pastured poultry producers who want to meet increased demand by scaling up from custom exempt/on-farm processing to an inspected plant, there are significant challenges and no obvious path.

When asked how respondents think their business and the industry will evolve in the next decade, two primary themes emerged: the importance of skilled labor and a related concern about succession planning, and how to grow the business. Processor respondents felt they are under increased pressure to grow and that small businesses will continue face increased competition and marketing power of the “big guys.” One multi-generational farmer/processor observed, “These days, you need 40-50 percent [annual] growth just to stay even.” Some non-processors felt that processing will continue to be the bottleneck in the supply chain due to small number of available facilities – or that as demand continues to grow such that more processors can get online, these plants will be bought by vertically integrated players and shut down, or will shut down due to related pressures such their producers entering contracts with large suppliers.

Yet despite these concerns, there was a strong sense from most respondents that small and very small niche meat processing will continue to exist and even thrive. Finally, several people pointed to the current and growing importance of collaboration and partnerships in building and maintaining both viable businesses and the sector as a whole.

Greater understanding of processing

A final question about changes in the sector asked if non-processors in or adjacent to the supply chain – whether producers, buyers, banks, regulators, NGOs, or others – understand meat processing better than they used to. This question yielded the widest range of answers, from “absolutely!” to “NOPE,” with “yes and no”s in between. There was no correlation based

on area of work; for example, the five processors had very different answers from each other. One processor suggested that this understanding varies a great deal by region, though the survey results did not bear that out. Here are the range of comments, sorted by “yes,” “maybe,” and “no”:

Yes, there is more understanding of meat processing

- Farmers used to have more mythology and negativity towards processors; that has much improved.
- With more attention and transparency, processors have become more honest and some bad actors have been forced out of the business.
- Banks are much more willing to lend to a small processor, seeing it as a viable business. Regulators are slowly coming around too, though it will be another 10-15 years before there is a real cultural shift there.

Maybe/It depends

- NGOs and similar entities are starting to get it, but not investors. Investors still seem to expect tech-level returns from agricultural businesses in order to invest.
- Everyone wants local meat, but no one wants a slaughterhouse in their backyard.
- Increased interest in butchering (e.g., many artisanal meat cookbook/butchery guides compared to years ago);
- Mainstream banks are not much help, but smaller ag-oriented banks respect this kind of business more than they used to, and the industry is in a much better position than a decade ago.

- There are so many variables that processors handle with our small customers; some understand our challenges, some do not.

No, there is not more understanding of meat processing

- Banks especially do not understand what we as processors do. Our plant has been in town for 50 years and some local business leaders still do not know what we do. Nonetheless, processors need to keep being increasingly transparent.
- Processors also need to understand other perspectives; e.g., banks are not going to start lending more freely, so processors need to create more value and become entrepreneurial.
- No one understands it, including the rural economic development office. The customer/buyer must be the one to demand pastured meat, not the processor.
- There is still a lot of ignorance along the supply chain about the challenges of cash flow, labor, regulatory requirements, etc., that processors deal with.
- If people understood processing, they would make more of an effort to solve the problems. Customers understand the benefits of pastured poultry to the farmer, the bird, the environment, but they don't want to think about the processing side... until processing disappears and then we have to all think about it.

Even with this range of responses – the widely varied attitudes about banks, for example – it is clear that NMPAN is making a difference in helping producers, non-profits, local governments, and others better understand processing. Non-processor respondents said that involvement with NMPAN has led to a

better understanding of how their work impacts the processor, the role of the processor in the supply chain, and the challenges processors face. “Being part of NMPAN has made processing less of a black box,” said one meat brand representative, noting that because of NMPAN she is more aware of the impact of special requests she makes of her processor partners. A food safety consultant said she has also learned a great deal from NMPAN about how to advocate for processors.

Current Role of NMPAN

NMPAN mission: Strengthen and expand slaughter and processing capacity, nationwide, for niche meats – such as locally grown, certified organic, grass-fed, no antibiotics/added hormones, and certified humane.

Stakeholder respondents were asked how well NMPAN is meeting its mission, on a scale of one (not at all) to five (100 percent). The average score was 4.4. Those who provided a score of less than 5 did so because they appreciate the network's existing work but would like it to do more. Eighty-seven percent of membership survey respondents said NMPAN is doing “moderately well” to “very well” in meeting its mission.

“I think it's fair to say we could not have opened our own processing plant and been successful without NMPAN.” – retail butcher/processor

How NMPAN Excels

According to all surveys, NMPAN is clearly accomplishing its goal of making resources and information more widely available. Sixty-seven percent of listserv member survey respondents said that NMPAN has increased awareness of regulatory compliance and where to find answers. Nearly 53% percent said it has increased their understanding of

the meat supply chain and local meat processing; about 45 percent said it both increased knowledge about good business practices and increased openness to learning and hearing from others. Thirty-five percent said it has renewed their excitement to be in this industry, and 21 percent said it has changed how they do business. (Respondents could check as many options on this question as applied.)

When asked to reflect on where NMPAN excels, nearly all stakeholder respondents discussed the community aspect and the wealth of information NMPAN makes available. They pointed to the ways in which the network facilitates connections between individuals who otherwise might not meet, including giving new and aspiring processors access to experienced processors. These mentoring relationships are critical to the success of new processors. Two respondents referred to it as an excellent community of practice, and eight pointed to the value of NMPAN's "networking," "community creation," "connection," or "bringing people together." Members of the Advisory Board also noted collaboration and community as reasons for joining the board, as well as the unique niche it fills. "There is nothing else like NMPAN out there," wrote one.

"It's completely changed the landscape for people who want to get into small processing – it used to be an information void," said one farmer/processor, observing that now it would be difficult to start talking about getting into niche meat processing without being directed to NMPAN. All respondents who are not processors themselves said they refer the processors they work with to NMPAN "all the time."

Where to Improve

Respondents who gave NMPAN a lower score (3.5 was the lowest score given in the stakeholder survey) said they did so for the following reasons:

- It is not reaching all the people it could be; NMPAN should do wider outreach
- They need to be careful about being a victim of their own success, e.g., with the listserv becoming unwieldy
- Other supply chain entities should be more represented in the community, since these businesses are all so intertwined

Some of these points are elaborated on in later sections about how NMPAN might address challenges in the industry.

Use of NMPAN Resources

"I know that through the listserv or the people in the organization, I can get to almost any resource that I need." – Processor

Three of NMPAN's extensive resources rise to the top in all three surveys. The Advisory Board survey lists (in order) the listserv, webinars, the website, and the newsletter as the most used. The website and listserv are essentially tied in the 2018 member survey, followed by webinars.

Respondents in the stakeholder survey noted the listserv as the top resource, along with the website and webinars. "The people component of NMPAN is one of the best resources out there," said one trade group representative. Three people described the templates and technical planning tools as very useful. One long-time producer/processor discussed participating in the peer-to-peer consulting service, reviewing blueprints for aspiring processors. "That's a really neat service; it's amazing to have someone look at specific plans and give advice" based on their own experience, he said.

Some non-processors (extension, consultants,

distributor) noted that they direct the people they work with to the website and listserv regularly. (“I probably send an email once a week saying, ‘if you look at the NMPAN website, you’ll find...,’” said a food safety consultant). They also said how useful it is to stay on the listserv even when the discussions are not directly relevant, in order to keep up with what is happening in the field and to answer questions.

“The website has been a great resource for case studies and actual ideas and mapping plans.” – small-scale processor

Five interviewed stakeholders reported some kind of change in practice based on NMPAN resources, including:

- ▶ Soliciting the listserv for examples of a distributor agreement; she now uses these templates in her business;
- ▶ The structure and architecture of the Wallace Center’s food system communities of practice are modeled on the NMPAN listserv;
- ▶ Assistance from listserv was invaluable in several unique situations, in operational decision-making; and in plans for starting one person’s next venture.

The only resource that was mentioned as being unused or under-utilized was the State Affiliates program, highlighted by three members of the Advisory Board. No one else mentioned the program, and links for many states on the State Affiliates section of the website are no longer active, seemingly corroborating that the program is not actively used.

Challenges for the Future of Niche Meat Processing

The goal of NMPAN, its members, and its partners is retention and recruitment of small and very

small processors who are part of the niche meat sector. Surveys of the Advisory Board and of key stakeholders both asked respondents to discuss challenges in the way of that goal.

Members of the Advisory Board identified the following as major challenges:

- ▶ Rapidly evolving marketplace; changing consumer preferences (mentioned by almost half the respondents; can be a challenge or an opportunity)
- ▶ Regulations, especially those for which small plants face a higher cost of compliance than large plants
- ▶ Farm viability and the economics of small scale production/processing
- ▶ Access to and retention of skilled labor
- ▶ Aging out of operators without succession plans
- ▶ Increasing industry consolidation and vertical integration

The stakeholders identified a similar set of issues, with some additions:

- ▶ Lack of succession planning for those aging out; recruitment challenges for the next generation; training for new players coming to meat processors from other industries (this group of concerns was expressed by almost a quarter of respondents)
- ▶ Labor: recruitment, succession, generational transition
- ▶ Economics of small scale processing: small businesses will always have some challenges due to being small, but small meat processors in particular have many vulnerabilities

- Need to tell the story better, both internally and for the public: failures of new plants do not help the market, but we also must learn from them; we also must be as transparent as possible about what the industry does, with a focus on the positive



Mobile poultry slaughter trailer. Credit: Mike Badger

- Processors must see themselves as part of the supply chain and recognize the value of the other parts of the chain (e.g., producers) to their own business
- Access to capital is challenging, given all the costs processors face (e.g. HACCP, other regulations)
- Some processing businesses could benefit from increased emphasis on profitability and entrepreneurship
- Lack of commitment from customers – the processing plant is not the anchor; buyer demand is, but not everyone understands that.

Recommendations for the Future

All three surveys asked where NMPAN should go in the next decade. Specific questions focused on potential new resources or programs, new audiences, and how NMPAN should be part of the solution to the ongoing challenges in the sector.

New Resources / Practices

The member survey asked what two topics respondents would like to see covered in a future webinar, video, or webpage. Seventy-three people provided either one or two suggestions. Some clear themes emerged for new topics:

- Attracting, training, retaining, pay/benefits for processing employees (12)
- Meat marketing (11)
- Navigating bureaucracy & regulatory compliance (state & federal) (8)
- Processing profitability (5)
- Charcuterie/cured meats (4)
- Business planning consulting (4)
- Labeling/Claims documentation (3)
- Other value-added products, such as jerky, broths, stocks, etc (3)
- Improving cutting yields (2)
- Pricing meat (both at processor level & retailing) (2)
- HACCP basics (2)
- Whole animal models (selling whole carcass) (2)
- Slaughter methods & the science behind them (2)
- Humane handling in general (2)
- Scaling-up poultry processing (2)
- Start-up Funding (2)
- More video content (2)
- Organic pathogen interventions in small plants/ anti-microbial interventions (2)

Twenty-three additional topics were suggested just once.

The Advisory Board was asked, “What new things should NMPAN start doing?” Responses focused more on delivery methods than topic areas, including:

► Increasing visibility, including via greater presence at conferences; more use of social media; revamping website design

► Additional practical templates and trainings

Other things mentioned were strategic planning; policy advocacy (including regarding how FSIS enforces humane handling standards); working more closely with other links in the supply chain; more focus on farm viability.

The stakeholders were asked: “What other resources, tactics, or programs could NMPAN consider to better meet your needs?” Responses focused on guides, trainings, a conference, and the listserv.

► Suggested topics for new NMPAN Guides:

- Design reference for plant construction, including pros and cons of various options for flooring, material choices, etc.
- Creative options for how to expand access to processing other than building a new plant
- How to meet food safety regulations in non-chemical ways that are appropriate for small and very small plants.

► Suggested topics for NMPAN trainings:

- Business planning and management, including financial literacy, staff training, cash management, how processors can support the other supply chain partners they rely on, etc. (this theme was discussed in various forms by several people.)
- Technology and digital data capture systems
- Regulatory assistance

• Wastewater management

► An NMPAN conference was mentioned by three people; one suggested it be on the West coast; the other suggested it be done in partnership with other groups. All acknowledged that a conference is a lot of work.

► Listserv: suggestion for a processors-only subsection of the listserv, so that processors can have more private conversations when necessary.

How can NMPAN be part of the solution?

Several of the Advisory Board’s member responses noted how much NMPAN is already doing to meet the challenges facing the niche meat sector. Additional suggestions focused on four main areas:

- Use the NMPAN network in a more focused way to help new processors find training, internships, and mentoring;
- Build additional partnerships across the supply chain: for trainings; to build the market (e.g., connecting brands and suppliers); with groups like statewide processor groups, American Association of Meat Processors, etc.;
- Continued support for regulatory change;
- Educational programming on business development and marketing opportunities.

The stakeholder group was asked the same question. Their answers overlapped to a great extent with their responses about additional resources that NMPAN could provide, particularly in the area of trainings.

► Trainings

- Worker recruitment, training, and retention

- Regulations, including not only food safety, but taxes, property codes, and other issues that impact processing businesses
- Business planning
- Entrepreneurship and profitability
- ▶ Continued focus on building community, including:
 - More public awareness of NMPAN
 - Crossover with related communities like the COMFOOD listserv
- Broadening the audience of NMPAN to also include more of the affiliated supply chain (e.g., marketers, distributors, food service, etc.)
- Increased and strengthened partnerships
- ▶ Advocacy
- ▶ Guidance for processors (and others in the supply chain) who are interested in cooperative marketing

4. Themes for Consideration



On-farm poultry slaughter set up. Credit: Harvey Ussery

The above section looked at responses to specific questions and practical suggestions for additional resources and programs. This final section presents four themes that emerged in evaluating data from all three surveys. It was clear that these are issues that are on people's minds, as they came up again and again in conversations and in responses to varied questions. As NMPAN looks to the future, it should consider the following themes to guide its areas of work.

Broadening NMPAN's reach

Respondents to all three surveys said that NMPAN is doing a great job – but it simply is not reaching enough people. Suggestions included investment in more outreach (advertising, press, etc.), having a presence at more conferences, simply being more intentional with asking partners to recommend NMPAN, and redesigning the “somewhat clunky” website for an easier user experience.

The need for greater outreach also applies within NMPAN; several issues where respondents requested more content (e.g., regulations, business viability) are

covered extensively on the NMPAN website. Some of this material should be updated or made more accessible (e.g., presenting more of it via video), but the requests for this information also indicate that it is not obvious on the website. NMPAN could both update the website to be more user-friendly, and do additional regular outreach within the network to remind members what resources are already available.

"Some don't have access to be out and about and talking to other processors, so if they can get it through email or webinars or your website, it's just a very valuable source."

—Processor trade group rep

Many people also discussed both the importance of partnerships, including with other niche meat groups, and the desire to include more links of the supply chain in NMPAN, such as more distributors, marketers, and others. On the other hand, processors would like the option of smaller listserv threads, so that they can occasionally discuss processor-only concerns in a less public space. The question for NMPAN will be how to balance the need to facilitate expertise in conversation while also including a 360-degree view of the niche meat supply chain.

The State Affiliate program – a potential source of partnerships and outreach – is not well utilized. Many contacts are out of date, website links are broken, or the people identified are not well versed in niche meat. NMPAN should consider the program's future, whether or invest in reinvigorating it, or dropping it altogether.

Regulations

This word came up many times in the member survey, particularly in responses to what NMPAN should do in its next decade. Of the stakeholder

respondents, six out of 15 discussed regulations as a challenge they or the processors they work with face on a regular basis, in particular, that compliance is much more costly for the small and very small plants in the NMPAN network than for large plants. HACCP and the Food Safety Modernization Act came up most often, along with issues like zoning and tax codes that can impact processing plants. Regulatory compliance is complicated, unpredictable, and expensive. NMPAN was acknowledged as having some good resources to help with regulatory questions. Other ways NMPAN could address this issue included:

- Training or coaching on regulatory assistance broadly, with specific suggestions for a) FSMA implications for processors; b) how to write HACCP plans; c) meeting food safety standards in non-chemical or organic ways.

- Advocacy. Four respondents discussed the present and potential advocacy role for NMPAN, recognizing that as part of Cooperative Extension, NMPAN cannot lobby, but acknowledging its role in supporting small processor-friendly legislation through research and awareness building. One processor noted that as a small business, additional advocacy on issues like affordable employee health insurance would be useful. Others discussed regulatory advocacy, including for scale-appropriateness and compliance support. Two of these mentioned poultry regulations in particular. Asked how NMPAN can address future challenges in the sector, a trade group director said, "It depends on how political they want to get. Figuring out ways to streamline those compliance processes – that's the next ten-year fight."

"NMPAN has been critical to National Sustainable Agriculture Coalition (NSAC)'s work on livestock, meat processing, and food safety issues. We refer members and constituents to NMPAN webinars all the time, and look to NMPAN for cogent

analysis of the issues whenever NSAC needs to weigh in on a bill on Capitol Hill or regulation or guidance at USDA on these processing and supply chain issues.”

Labor

Many processors are in rural or semi-rural areas, and they often offer living-wage jobs that can be rare for their regions. A processor’s workforce can make the business be an important economic driver in depressed rural areas, but numerous stakeholders, particularly the processors themselves, discussed how difficult it is for them to find well-trained workers. One person interviewed remarked that an acute worker shortage is a concern when he considers expanding the business. Issues of healthcare affordability and immigration are paramount as well.

One nonprofit partner wondered if NMPAN might be able to play a role in developing something like a network of worker training programs at community colleges. Other ideas for NMPAN to consider include producing additional worker training materials, convening a stakeholder summit to determine how to effectively be part of the solution to this challenge, or developing a replicable model of a journeyman meat cutter apprentice curriculum.

Business viability

While the themes above all play a part in business viability; this subsection addresses concerns respondents raised about profitability for processing operations now and into the future.

Many members in the listserv survey are interested in growing their businesses and increasing profitability through value-added and other new products and services. As described above, this was the top requested webinar topic.

Several respondents – especially, it should be noted, people in support roles who work with processors more than processors themselves – would like NMPAN to offer more resources, trainings, and mentorship on the nitty-gritty of business planning. In addition to overall business planning, specific areas included staff training, management, financial literacy, and entrepreneurship. In many cases these resources already exist on the NMPAN website, but may be hard to find.

Building a new processing plant is often prohibitively expensive, and frequently is not a viable option for expanding access to processing in a given community. Stakeholders expressed desire for more open discussion and thinking about creative solutions for processing other than constructing a new plant. Some felt that high-profile failures of new plants in recent years did not help morale in the industry – and were missed opportunities to discuss important lessons about what led to the failures.

One aggregator appreciated that Lauren and Arion were some of the few voices “doing a lot of reality checks” several years ago when many counties were investing in plant feasibility studies; she would like to see them continue to express that opinion publicly. Others indicated that they would like more case studies on alternatives, such as Across the Creek Farm in Arkansas turning an existing beef plant into a mixed-use facility by adding a “poultry shed” to the back. Models for cooperatives were also discussed, including for marketing, finding markets for offal and other by-products, and across the supply chain as a way to compete with bigger operations.

Finally, much like farmers, processors are aging, and they and other stakeholders are concerned about who the next generation of processors will be. Many processors do not have a succession plan. Issues of training and financing also play in.

5. Conclusion



Moving sheep to new pasture in Oregon. Credit: Alicia Jones

“It’s drastically changed the landscape for people who want to get into the processing sector. Ten years ago, people had no place to turn when they wanted to get in; it was a complete void. It would be hard now to talk about starting a small processing operation without someone pointing you to NMPAN.”

–Producer/processor

Ten years ago, the Niche Meat Processors Assistance Network identified an important obstacle to the growth of the niche meat sector, and set out to overcome it by creating access to information and a community. The industry still faces many challenges, but isolation and lack of resources are no longer major considerations, thanks to the success of NMPAN. In particular, the listserv, website, and

webinars – and the relationships formed on the basis of those projects – have been transformative to many business ventures.

The primary takeaway from this assessment is of a successful, useful network. Its members and stakeholders feel satisfied and empowered by their participation and are not looking for major changes in NMPAN operations or focus areas. They agree that it should be better known through additional promotion and partnerships, and as they are thinking a great deal about regulations, labor, and business viability, they would like NMPAN to increase assistance in those areas. Otherwise, keep doing what has worked for the last decade.

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Pasture-raised heritage-breed pigs. Credit: Steve Knudsen

Appendix I: Stakeholder Interview Respondents

Lois Aylestock	VA	Blue Ridge Meats
Mike Badger	PA	American Pastured Poultry Producers Association
Joe Cloud	VA	True and Essential Meats
Jennifer Curtis	NC	Firsthand Foods
Keith Dehaan	MO	Food and Livestock Planning, Inc.
Jeff Farbman	VA	Wallace Center at Winrock International
Karen Giovannini	CA	University of California Cooperative Extension, Sonoma County
Greg Gunthorp	IN	Gunthorp Farm and Brushy Prairie Packing
Kathleen Harris	NY	Consultant
Janis Hochstetler	IA	Iowa Meat and Poultry Inspection Bureau
Julie Lorenz	MN	Minnesota Association of Meat Processors; Lorentz Meats
Kathryn Quanbeck	CA	Emmer and Co. (pastured poultry)
Michele Pfannenstiel	ME	Dirigo Food Safety
Mike Smucker	PA	Smuckers Meats
Steve Warshawer	NM	La Montanita Co-op; Mesa Top Farm

Appendix II: Interview and Survey Questions

Stakeholder Interview

Part I: Reflections on the last 10 years in general for business and area of work:

- ▶ Describe your business/area of work.
- ▶ How long have you been in business or in this sector?
- ▶ How has your business evolved over the last 10 years?
- ▶ How has the meat and poultry sector changed in that time?
- ▶ How have your customers/clients changed over the last decade?
- ▶ How do you think your business/the sector will evolve and adapt in the next decade?
- ▶ Do you think other people – e.g. livestock producers, nonprofits, banks, regulators, etc. – understand meat processing more than before? If not, what do they need to understand better?

Part II: Reflections on NMPAN: Have we accomplished our mission?

Current NMPAN mission: NMPAN is a network and info hub for people and organizations who want small meat processors to thrive. It offers tools and information for small processors and the farmers, marketers, and meat buyers who depend on them. Its long-term goal is improved viability of the processors we need for the niche meat sector.

- ▶ On a scale of 1-5 (1 is not at all; 5 is 100%), how well do you think NMPAN is accomplishing their mission?
- ▶ In what areas do you think they excel and in what areas do you think they could improve?

Resources

NMPAN has many resources, including the listserv, website, peer consulting, newsletter, webinars, YouTube channel, State Affiliates, research, and so forth.

If you aren't a processor, has your involvement with NMPAN or use of their resources made you more cognizant of how your work impacts small processors and meat producers? Are you more aware of the meat processor's role in sustainable and local food systems, and if so, how has that changed how you work?

- ▶ Which of these have been useful to you and your business, and how? Any specifics?
- ▶ Have any NMPAN resources led you to implement a change in practice?
- ▶ What other resources, tactics, or programs could NMPAN consider to better meet your needs?

Part III: Future

If the long-term goal is retention and recruitment of small and very small processors who are part of niche type meat production, how can we get there? What are the durable, long-standing challenges that may be in our way?

Anything final you'd like to say about why NMPAN matters to you?

- ▶ What can NMPAN do about those durable, long-standing challenges?
- ▶ How should it evolve in the next decade? Are there important audiences that we are missing?

Advisory Board Survey

Q1: How long have you been on the Advisory Board?

Q2: In your own words, please describe what motivated you to join the NMPAN Advisory Board?

Q3: Please read the following statements and rank your thoughts on them. (1 is fully agree, 2 is somewhat agree, 3 is neutral, 4 somewhat disagree, and 5 is don't agree at all.)

- ▶ I am motivated to continue to serve on the Advisory Board
- ▶ We need more meat processors on our Advisory Board
- ▶ We need more meat producers (farmers/ranchers/or brands) on our Advisory Board
- ▶ We need other expertise on the Board: please describe below
- ▶ We should try to meet in person once a year or every other year

- ▶ I feel like the Advisory Board is well utilized
- ▶ I feel that my particular expertise is well utilized
- ▶ I feel like the Advisory Board could do more for the organization

Q4: Which NMPAN resources do you use the most in your work? Please rank in order of importance for the work that you do.

- ▶ Listserv
- ▶ Webinars
- ▶ Website
- ▶ Newsletter
- ▶ State Affiliates
- ▶ Publications
- ▶ Direct Consultation
- ▶ Videos

Q5: What other NMPAN resource is useful to you but wasn't on that list?

Q6: In your opinion, what programs and services of NMPAN are no longer useful and should end?

Q7: In your opinion, what new things should NMPAN start doing?

Q8: What important audiences are we not reaching well - or not reaching at all?

Q9: If the long-term goal of NMPAN is retention and recruitment of small and very small processors who are part of niche meat production, what significant challenges are in the way?

Q10: Given your previous answer, how should NMPAN be part of the solution?

Q11: Any other thoughts about NMPAN or your participation on the Advisory Board?

Membership Survey

Q1 - 1. Please let us know who you are (check your primary occupation and secondary occupation if applicable)

- ▶ Meat Processor (slaughter and/or cut and wrap)

- ▶ Retain Butcher
- ▶ Meat Brand/Distributor
- ▶ Chef/Food Service
- ▶ Farmer/Rancher
- ▶ Extension/Academia
- ▶ Government Agency Employee
- ▶ Nonprofit Employee
- ▶ Equipment/Supply Company
- ▶ Consultant
- ▶ Bank/Finance/Economic Development
- ▶ Other

Q2 - 2. For Producers or Processors: How long have you been in business? (skip question if you aren't either)

Q3 - 3. For Producers or Processors: What is your current level of satisfaction with your business in terms of financial viability? (skip question if you aren't either)

Q4 - 4. For Producers or Processors- What is your current level of satisfaction with your business in terms of quality of life (for both you and your employees)? (skip question if you aren't either)

Q5 - 5. How have you used NMPAN to benefit your business or organization? (select all that apply)

- ▶ Used information from the NMPAN website
- ▶ Learning from others on the NMPAN listserv
- ▶ Used information from the NMPAN webinars
- ▶ Watched NMPAN YouTube videos
- ▶ Direct consultation with NMPAN staff
- ▶ Peer to peer mentoring
- ▶ Read a NMPAN publication(s)
- ▶ Learning from the NMPAN newsletter
- ▶ Attended a workshop/presentation that NMPAN staff participated in
- ▶ Used a State Affiliate from the NMPAN website
- ▶ Other/Comments

Q6 - 6. Which TWO NMPAN resources have you utilized the most in the past year? (pick two only)

- ▶ NMPAN listserv
- ▶ Webinars/Videos
- ▶ Website
- ▶ Newsletter
- ▶ State Affiliates/State Processor Listings
- ▶ Publications
- ▶ Direct Consultation/Technical Assistance
- ▶ Other

Q7 - 7. What TWO topics would you like to see us cover more in a future webinar, video, or a webpage? (please describe)

Q8 - 8. Please complete this sentence: "NMPAN has....." (select as many as apply to you)

- ▶ increased my knowledge about good business practices
- ▶ increased my awareness about regulatory compliance and where to find answers
- ▶ increase my understanding of meat supply chain and local meat processing
- ▶ increased my openness to learning and hearing from others
- ▶ renewed my sense of excitement to be in this industry
- ▶ changed how I do business or led to new business opportunities
- ▶ other

Q9 - 9. NMPAN's mission is to be a network and info hub for people and organizations who want small meat processors to thrive. We offer tools and information for small processors and the farmers, marketers, and meat buyers who depend on them. How well do you believe NMPAN is achieving its mission?

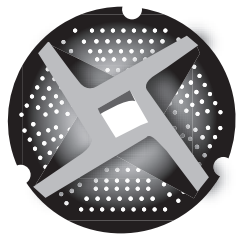
Q10 - 10. What should NMPAN do in our next decade?

- ▶ Keep doing the same thing: it's working!
- ▶ Do mostly the same thing, just minor changes
- ▶ It's time for NMPAN to make some big changes

Q11 - 11. If you recommended "big changes" or "minor changes," please say more

Q12 - 12. What region are you located in?

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NICHE MEAT PROCESSOR
ASSISTANCE NETWORK



Oregon State University
Center for Small Farms &
Community Food Systems

