

# SUSTAINING THE PACIFIC NORTHWEST

## Food, Farm, & Natural Resource Systems

December 2008

Volume 6, No. 3



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### Local Meats for Local Meals: **An Assessment of Demand for a Mobile Slaughtering Unit in Pierce, King, Kitsap and Thurston Counties, for the Puget Sound Meat Producers Cooperative**

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#### Introduction

In Washington State, processing of meat from cattle, swine, sheep, and goats is regulated by the Washington State Department of Agriculture (WSDA) and, depending on the type of sale, by the USDA as well (Zenz et al., 2006). Animals slaughtered and processed by WSDA-licensed facilities are limited to "the sole consumption of the owner," and may not be re-sold (WSDA, 2008a) in direct markets (e.g., farmers markets) or wholesale markets (e.g., grocery or restaurants). Meanwhile, a large number of customers who purchase meat at restaurants, farmers' markets, and retail markets, are willing to pay premium prices for locally-produced and otherwise differentiated products. Local farmers' market managers, chefs, and retailers say demand outstrips current supply (Walpert, 2008; Curtis, 2008).

Producers who wish to sell meat products by the pound or to retail sellers must have the animals slaughtered and processed in USDA-inspected facilities (Zenz et al., 2006). The number of these facilities has fallen over the last 30 years, both nationally and in Washington State (Barkema et al., 2001; Gurion-Sherman, 2008). In Washington State, many of the remaining USDA-inspected facilities have minimum head requirements or work only on contract, and many process only beef (Zenz et al., 2006). These restrictions, combined with the loss in total numbers of slaughtering and processing facilities, have made it difficult for small to mid-size farms to access USDA-inspected slaughtering and processing services.

#### The Puget Sound Meat Producers Cooperative

Producers and butchers, along with interested agencies, governments, and community groups across the Puget Sound region have been working to overcome barriers for small meat producers through a wide range of efforts. The City of Enumclaw identified a need for USDA slaughter facilities in its community as a means to keep agriculture viable. Shortly after

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*Taos NM unit owned and operated by the Taos Co. Economic Development Corporation. Photo courtesy of Bruce Dunlop, Lopez Island Lopez Island Farm.*

the Enumclaw's Mayor hosted an Ag Summit in November 2007, the Puget Sound Meat Producers Cooperative (PSMPC) formed to provide and strengthen the infrastructure needed to allow local farmers to market local USDA meat to Puget Sound consumers.

The group is working to establish a mobile slaughtering unit to provide USDA-inspected slaughtering services to producers. After researching other mobile slaughtering units (MSU) state and nation-wide, the group believes an MSU will provide high quality services at a smaller scale, with higher flexibility, at a lower capital cost, and with less neighbor opposition than a fixed facility might provoke. The Island Grown Farmers Cooperative, located in Washington State, operated the first mobile unit in the nation, and continues to serve producers in Northwest Washington counties.

The Puget Sound Meat Producers Cooperative has received support from a variety of government agencies in its proposed service area and the Pierce Conservation District is hosting the project as it develops. The group plans to work with existing state-licensed processing facilities to upgrade to USDA inspection and provide USDA cut and wrap. To prepare a feasibility study, Puget Sound Meat Producers Cooperative collaborated with the Daniel J. Evans School of Public Affairs at the University of Washington to survey producers and determine the level of demand.

#### Farmer Assessment Survey Methodology

Before writing the survey, the logic model was used to identify what additional steps, beyond acquiring and operating the MSU, would be necessary for project success. Five steps were identified:

1. Producers have the skills and resources they need to successfully produce animals for the mobile slaughtering unit.
2. Once running, the mobile slaughtering unit will break even.
3. Existing cut and wrap facilities will be willing and able to upgrade to provide USDA-inspected cut and wrap services, at the times of year, and in the volumes, that the mobile unit will demand.
4. Producers will know how to access new markets that are open to them with USDA inspection.
5. There is existing unmet customer demand for USDA-inspected, locally-raised meat.

Not all of these targeted steps could be tested through the survey, but this allowed project partners to systematically write survey questions and to identify other work that needed to be done to complete a feasibility study. In designing [the survey](#), we assumed that responses would mostly come from those interested in using the unit and who

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were therefore more likely to reply to the survey. Based on this, we attempted to reach as many producers as possible, with the expectation that the results would show a conservative estimate of total demand in the four-county area. The survey was mailed through the National Agricultural Statistical Service's mailing list, to everyone who owned one or more broiler or fryer (but excluding pullets or layers), turkey, goat, sheep, hog, or cattle (including cow/calf operations, dairy, or cattle operations), a total of 1901 surveys. A mailed reminder was sent two weeks later. We also sent announcements through a variety of email list-serves in the counties, reminding people to answer the survey, and giving them a link to an on-line version of the survey. We received 395 responses from within the survey counties, an overall response rate of 20.7 %.

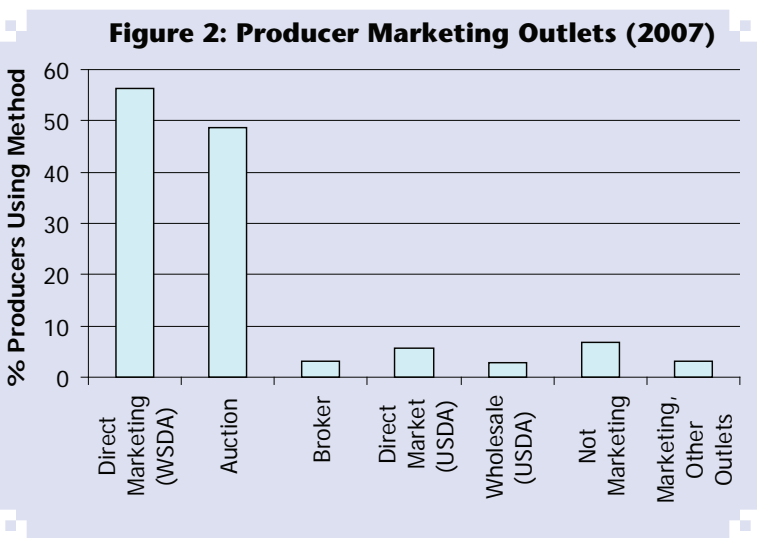
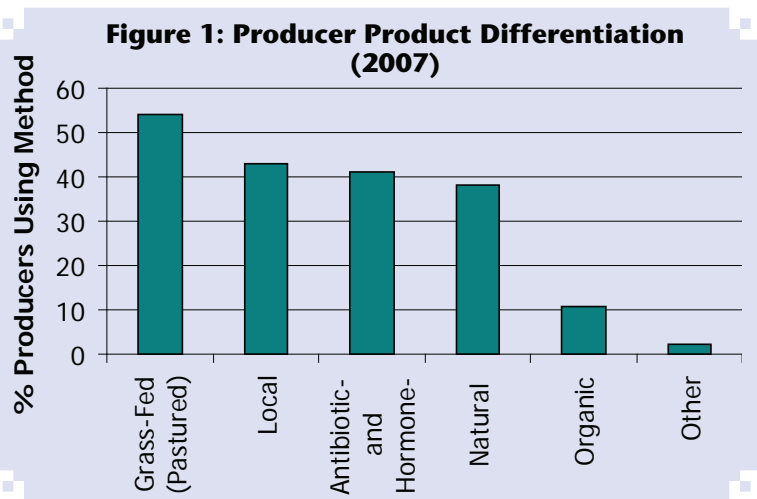
### Survey Results

Survey results confirmed what project partners suspected: most producers currently produce differentiated products suitable for premium markets, but market animals live or on the hoof, under WSDA inspection, rather than to markets requiring USDA-inspection (Figures 1 and 2). Once the MSU offers USDA-inspected slaughtering services, one might expect an increase in the number of producers selling to direct markets with USDA inspection.

When asked if they will use the MSU during its first five years of operation, 254 (82%) active producers (out of 309 relevant responses) expressed some level of interest in using the MSU. Limiting the anticipated start-up volumes to animals identified by these interested producers provides an extremely conservative estimate of demand, particularly given that not all interested individuals completed the survey. Based on this, the combination of guaranteed and possible demand may be closer to the true demand within the surveyed counties.

Table 1 shows anticipated volumes of livestock. Producers plan aggressive expansion in their use of the MSU over the first five years of operation, resulting in producer plans to slaughter 77% more beef cattle, 67% more swine, 139% more sheep, and 94% more goats. This projected increase is striking given that it will occur against a backdrop of a long-term decline in livestock populations in the surveyed counties.

Survey results also provided important information about how the MSU should structure services. For example, both the number of producers who would use the unit and the volume of animals producers would slaughter, diminish if producers have to transport their animals to a satellite location, even at fairly short distances (Figure 3). However, the number of animals slaughtered falls off somewhat more slowly than the number of producers, indicating that producers with more animals to slaughter may be more willing to travel than those with only a few livestock. To remain cost-effective, the MSU would likely be unable to travel directly to farms slaughtering only a few animals.



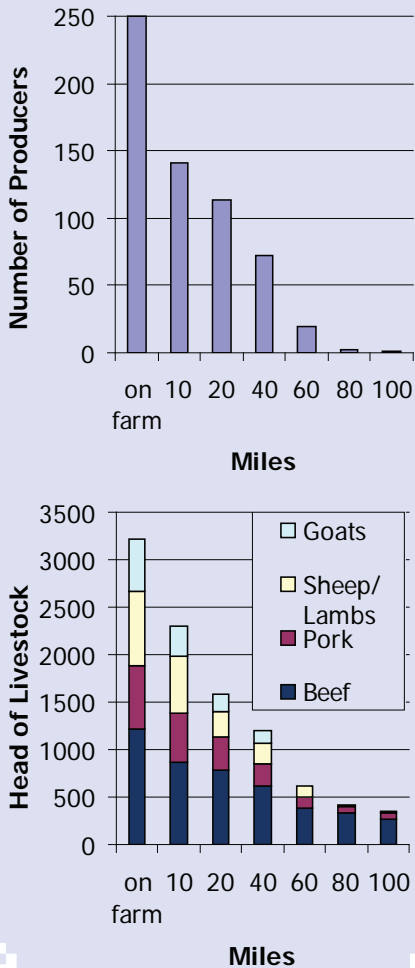
**Table 1: Demand for the MSU in Year 1 and Year 5**

Demand	Year 1				Year 5			
	Beef	Pork	Sheep/Lamb	Goat	Beef	Pork	Sheep/Lamb	Goat
Guaranteed	880	372	369	472	1559	620	883	916
Possible	309	302	411	70	593	334	265	150
<b>TOTAL</b>	<b>1189</b>	<b>674</b>	<b>780</b>	<b>542</b>	<b>2152</b>	<b>954</b>	<b>1148</b>	<b>1066</b>
Guaranteed/Total	74%	55%	47%	87%	72%	65%	77%	86%

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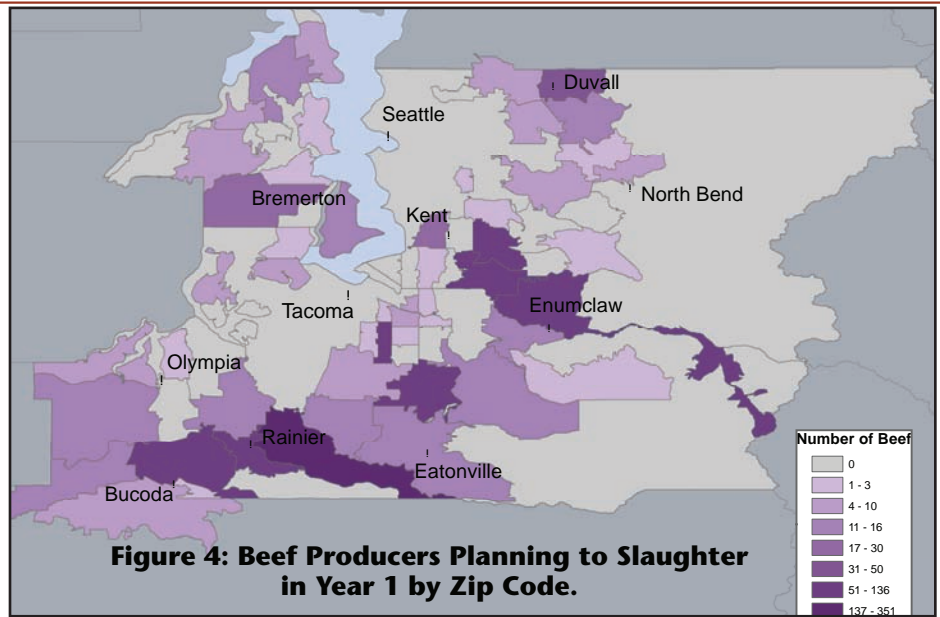


**Figure 3: Miles Producers Willing to Travel to Market & Animals Producers Willing to Slaughter at a Given Travel Distance In First Year**



Since animals are not evenly distributed, the project used ArcView GIS to construct maps depicting the location of each farm that indicated in the survey that it will use the MSU. Figure 5 is an example of a map of farms with of beef cattle to be slaughtered. The Puget Sound Meat Producers Cooperative will explore the possibility of operating the MSU at large farms close to the more concentrated areas of animals, allowing producers with only a few animals to travel to farm locations nearest them.

Producers were also asked what optional services they would use in conjunction with the MSU



**Figure 4: Beef Producers Planning to Slaughter in Year 1 by Zip Code.**

(Figure 5). As expected, most producers, more than 80%, said they would use USDA inspected cut and wrap and meat processing services in addition to USDA-inspected slaughtering services. With the exception of meat sold directly to consumers from a WSDA-licensed retail facility, meat slaughtered under USDA-inspection must also be processed under USDA-inspection. A significant number of producers said they would also use marketing assistance to sell to farmers' markets, farm stands, CSA's, or restaurants. This is consistent with the fact that few producers currently market through these outlets.

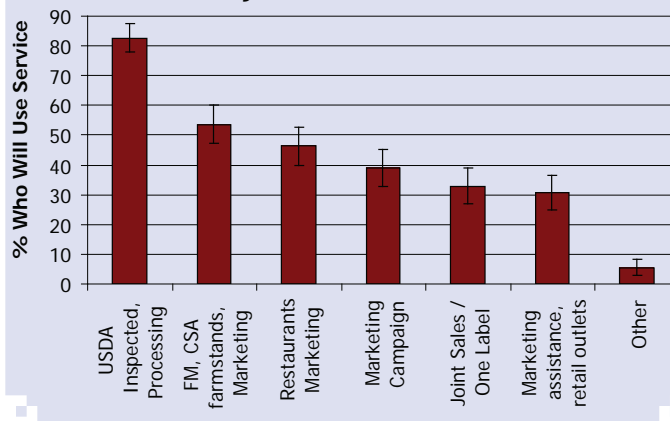
Among the many challenges facing the MSU will be the higher costs associated with USDA requirements

than for mobile facilities licensed under the WSDA Custom Meat program. Costs for equipment, record-keeping, and documentation meeting USDA requirements is high and expensive to acquire and maintain. Nevertheless, roughly 65% to 75% of producers interested in using the MSU were willing to pay an additional mark-up of up to 30% for USDA inspected slaughter, in addition to charges they already pay for WSDA Custom Slaughter. We did not ask whether producers would be willing to pay more than an extra 30%.

**Summary**

Market interest assessment information obtained directly from farmers provides a tool for educators, local governments, and food marketers to develop practical strategies to support the development of local meat sales. The Puget Sound Meat Producers Cooperative has presented survey results to potential funders and county officials to support the idea that a USDA-inspected mobile slaughtering unit will help support viable farm businesses in Western Washington. In addition, the data helps refine project planning because it

**Figure 5: Optional Services Producers Want in Conjunction with the MSU**



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empirically illustrates where producers of USDA inspected products are located and what services they would need.

To learn more about the Puget Sound Meat Producers Cooperative please contact: [Cheryl Ouellette](#), Project Coordinator, Pierce Conservation District, P.O. Box 1057, Puyallup, WA 9837.

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## The Experiences and Perspectives of Washington's Certified Organic Producers: Results from a Statewide Survey

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Organic farming is one of the fastest growing segments of U.S. agriculture. Washington State ranks third in the number of certified organic operations (USDA-ERS, 2008). Approximately 80,000 certified organic acres produce annual organic farmgate sales over \$144 million (Kirby and Granatstein, 2008). It is important to understand the characteristics, marketing strategies, information sources, challenges, and opinions of the state's organic producers. Therefore, I conducted a survey of all certified organic producers in Washington from October through December, 2007. The survey results will help Washington State University and other service providers better meet the needs of the state's certified organic producers.

### Survey Methods

I sent surveys to all certified organic producers in Washington: 670 certified by the Washington State Department of Agriculture's Organic Food Program and 14 certified by Oregon Tilth. I later excluded 49 individuals because of ineligibility (e.g., producers in transition to organic but not yet certified) and bad addresses. I contacted individuals four times by mail: an initial mailing with questionnaire, a reminder postcard, and two follow-up mailings with questionnaires. A link to an online version of the survey was provided in each mailing. Three hundred fifty-six individuals completed the survey (56% response rate).

### Who are Washington's Certified Organic Producers?

Nearly 78% of the survey respondents were male, while 22% were female. Nearly 95% of respondents were Caucasian, 3% Latino/Hispanic, and 1% Asian. Most respondents (88%) lived with a spouse or domestic partner. Slightly over half (54%) described their role on the farm as "the primary decision-maker," while 39% shared decision making with a spouse, relative, or non-family business partner. Male respondents more often saw themselves as primary decision-makers (61%) compared to female respondents (37%).

Respondents ranged in age from 23 to 82 with a mean age of 52 years. Respondents had spent 21 years, on average, as a farm owner, manager, or primary decision-maker and a majority (56%) had parents who farmed. Over one half (52%) had a four-year college degree and 15% had a graduate degree. One third (34%) worked at a regular off-farm job and 55% had a spouse or domestic partner with an off-farm job. Children under the age of 18 years lived with almost 40% of respondents.

Survey respondents belonged to many different types of agriculture-related organizations. Interestingly, an equal percentage of respondents (43%) claimed membership in Washington Tilth and the Farm Bureau. Equal percentages (26%) belonged to product-specific and organic-specific growers' associations. Approximately one-fifth were farmers' market association members. Nine percent of respondents held leadership positions in organic or sustainable agriculture organizations.

### Characteristics of Washington's Certified Organic Farms

One-half of respondents (52%) transitioned from conventional (non-organic) farming methods to organic methods, while 41% indicated they had always farmed organically. Men were over three times as likely to have transitioned from conventional methods compared to women.

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