

Demand Study: **Assessing volume and attributes of farmer demand for slaughter and meat processing services in Massachusetts**

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Submitted by



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Introduction

Since 2007, Community Involved in Sustaining Agriculture (CISA) has heard from farmers in the CT River Valley region that slaughter and processing are a major constraint to starting and maintaining viable local meat businesses. We decided that it was essential to **assess the demand** for slaughtering and processing services, and work with several groups of farmers, experts, and partners to **determine options** for meeting this demand. This research is compiled in CISA's assessment "*Demand and Options for Local Meat Processing: Finding the way from pasture to market in the CT River Valley*".

In order to assess demand for slaughter and processing services, and thus to get a better handle on the need for additional slaughter and processing capacity in the CT River Valley, CISA worked with partners to develop a survey of meat producers. The goal of this survey was to gauge the volume of potential inputs for slaughter/processing operations, and the attributes of services desired by farming constituents. Our research focused on the needs of the farming community because they will serve as the customer base for any processing and slaughter operation and because it is this stakeholder group which is most negatively impacted by the current lack of options.

While a summary of survey findings is outlined in the assessment *Demand and Options for Local Meat Processing*, the details of the survey results, along with discussion and analysis, are outlined in this report. Below you will find a review of methods and context, a detailed assessment of survey responses, and comparisons with data from Southeastern Massachusetts.

Methods

Survey Tool

CISA reviewed a range of surveys used for other studies and developed a survey in collaboration with Community Action Brattleboro Area (CABA). This partnership was formed to enable comparisons between states and allow us to develop a fuller picture of the demand for slaughter and processing services. CABA has agreed to tabulate the data from Connecticut, Vermont, New Hampshire, and New York, while CISA tabulated data from Massachusetts.

Sampling Frame/Distribution

CISA distributed the survey electronically and over 600 hard copies were sent to livestock and poultry farmers between December 2007 and February 2008. The mailing list was comprised of memberships and listserves associated with livestock production including CISA's Local Hero program, Pioneer Valley Sheep Breeders Association, American Highland Cattle Association, Graze It Up listserv, etc. It was also distributed by request (i.e. word of mouth) and by our partnering organizations, including the Massachusetts Farm Bureau Federation, CABA, NOFA/Mass, Berkshire-Pioneer RC&D, New Entry Sustainable Farming Project, and the Berkshire County Farm Service Agency.

CISA and CABA distributed the survey to Connecticut partners, and at a Connecticut Meat and Poultry Producers' meeting. Connecticut partners were encouraged to share the survey with other stakeholders around the state, while CABA offered to gather and analyze the survey data from the region.

Response Rate

An estimated 600 hard copy surveys were mailed out to farmers, in addition to emails sent out to mailing lists by partners, and electronic announcements to over 800 farms. We estimate less than a 20% response rate considering that many farmers received electronic copies, in addition to the approximately 600 farmers who received the survey by mail.

Of the 114 surveys returned from Massachusetts farmers, two were removed because the respondents do not currently, or intend to, raise animals for slaughter. Out of the remaining 112 surveys, 104 of the respondents are currently raising livestock and arranging for slaughter/processing. Nine farms are not, but indicated that they have the potential and interest to raise livestock.

Representation

The table below illustrates how the survey results for number of animals harvested annually (“Current Annual Harvest”) compare with the number of animals raised¹ in the five counties most represented by our survey. Please note that the survey only accounted for the number of animals that are slaughtered and processed for meat, not total number of animals on a farm (which may be raised for other purposes, kept from year to year as breeding stock, etc.). This comparison demonstrates that, if anything, our survey underestimates the demand for slaughter and processing in the region. As *Table 1* shows, our survey captured between 1.4% and 22.9% of the total animals.

Table 1. Annual Harvest Numbers from Survey² as % of Total Livestock and Poultry in Five Counties (western and central Massachusetts)

County	Beef Cattle	Lambs	Goats	Pigs	Turkeys	Chickens
Berkshire	3.8%	22.7%	2.9%	32.7%	0.0%	0.2%
Franklin	7.8%	7.3%	1.0%	6.6%	0.9%	0.8%
Hampden	11.9%	2.4%	2.1%	17.1%	4.9%	1.2%
Hampshire	4.6%	6.4%	1.0%	2.3%	107.0%	29.0%
Worcester	1.8%	10.1%	0.0%	1.2%	1.6%	0.5%
<i>Average</i>	6.0%	9.8%	1.4%	12.0%	22.9%	6.4%

Scope

Geographic

This report covers survey results for Massachusetts respondents. While some surveys were sent through state-wide membership lists (e.g. Massachusetts Farm Bureau Federation), many were distributed primarily through farmer networks in **western and central** Massachusetts, and no responses were received from Barnstable, Dukes, Nantucket, and Suffolk counties³. This may be due to the higher concentration of farms in central and western counties, the inadvertent bias in distribution (through regional agricultural networks and additional snowball sampling), and an effort to avoid duplication of the 2006 survey implemented by the Southeastern Massachusetts Meat Producers (see below). This geographic bias is reflected in our results, where counties with the top five respondent counts are in western and central Massachusetts.

¹ Total livestock and poultry numbers provided by Massachusetts Department of Agricultural Resources, December 2007.

² These annual harvest numbers for Massachusetts used the maximum numbers reported by farmers when a range was provided (not the average of their range, which was used for the remainder of the study).

³ In order to present a more thorough state-wide analysis, we have included results from the Southeastern Massachusetts Meat Producers Questionnaire of 2006 in our analysis. (See *Southeastern Massachusetts*)

Table 2. Total Number of Respondents by County

County	Frequency	% of Total Responses
Franklin	39	34.8%
Worcester	22	19.6%
Hampshire	16	14.3%
Berkshire	11	9.8%
Hampden	7	6.3%
Middlesex	4	3.6%
Norfolk	2	1.8%
Plymouth	2	1.8%
Bristol	1	0.9%
Essex	1	0.9%
Unknown	7	6.3%
Total	112	100%

Southeastern Massachusetts

As CISA expanded distribution of this survey around the state, partners in southeastern Massachusetts suggested that we incorporate data collected through the *Southeastern Massachusetts Meat Producers Questionnaire* implemented in September 2006 rather than duplicating efforts with a new survey⁴. While several farms from eastern counties responded to CISA’s 2008 survey directly, we have also included some observations from the 2006 SMMP study to compliment our 2008 survey findings below.

Target Audience

We defined the target population for this study as farmers who raise livestock and poultry and arrange for their slaughter and processing. The survey tool was designed to avoid double counting animals raised by one farm and finished and processed by another.

Species Distribution

Most of the farmers who responded to the survey raise beef cattle (59 respondents) or sheep (38 respondents), along with other animals in some instances), see *Table 3*. This species distribution is not necessarily representative of all farms in Massachusetts, and may be due, in part, to a bias in the survey distribution methodology. While surveys were sent out to a range of agricultural organizations, we did not seek out mailing lists for most individual species (e.g. dairy cattle or poultry), other than one small organization each for beef cattle and sheep.

Table 3. Total Number of Farms Raising Meat Animals by Species

Species	#	Species	#
Beef Cattle	59	Dairy Culls	10
Lambs	38	Veal Calves	8
Hogs	26	Goats	7
Chickens	24	Geese/Ducks	6
Turkeys	16	Other	6

⁴ In September-October 2006, 850 questionnaires were sent out by Pilgrim RC&D and the Southeastern Massachusetts Meat Producers Steering Committee to livestock farms in Bristol, Plymouth, Barnstable, Dukes and Nantucket Counties. (Note: This survey was completed before the Adams Farm Slaughterhouse was destroyed by fire in Athol, Massachusetts December 2006.)

Respondent Characteristics

Many of the respondents represent small and diversified farms. Fifty-one respondents reported raising more than one species of animals, meaning that almost half (49%) of the farmers surveyed (who currently raise animals) have farms with somewhat **diversified** animal production. Also, many of the respondents own relatively **small** farms. Taking beef cattle ownership as one example, 77% of the beef farmers harvested 1-10 beef cattle per year, 13% harvested 11-30, and only 10% sent 31 or more beef cattle for slaughter annually.

Findings

Current Annual Harvest

The primary purpose of this study was to understand the volume and characteristics of demand for slaughter and meat processing services in the study area. The survey included the question: “How many animals do you harvest per year? (Current Annual Harvest)”, and provided a list of species, including beef cattle, dairy culls, veal, goats, pigs, turkeys, chickens, lambs, geese/ducks, and other. Answers for the “Other” category included adult sheep for mutton, rabbits, emu, and “guineas”. Many respondents provided a range for their current annual harvest (e.g. 4-5 beef cattle, 2-4 lambs). *Figure 1* below shows the **average** annual harvest number calculated per individual farm. Respondents reported roughly 2,845 chickens slaughtered each year, 1,052 lambs, and 664 beef cattle.

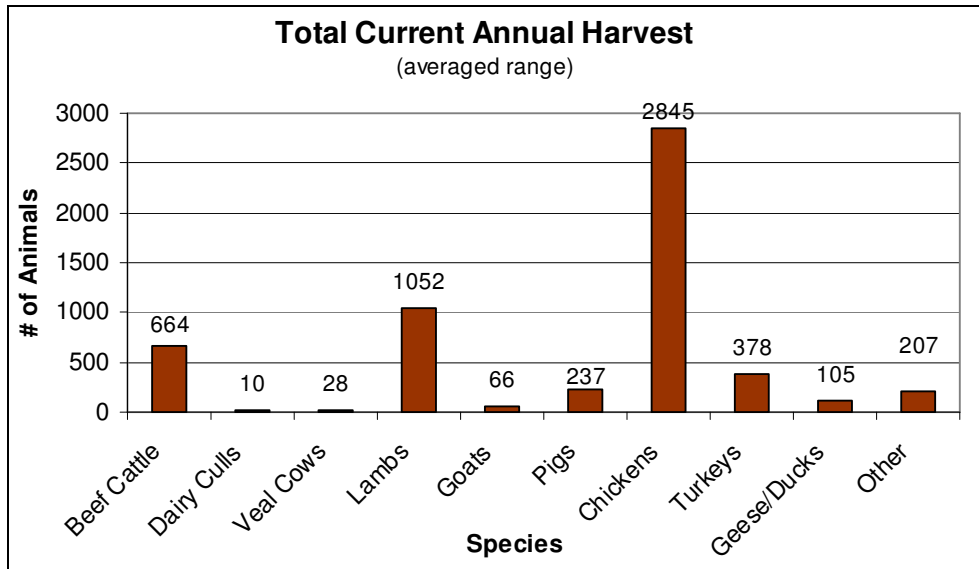


Figure 1. Total Current Annual Harvest (with averaged ranges per respondent)

The 2006 SMMP study asked southeastern Massachusetts farmers to provide annual production numbers (versus harvest numbers) with the question: “What type and how many animals do you raise (total annual number)?” Results were tabulated as follows:

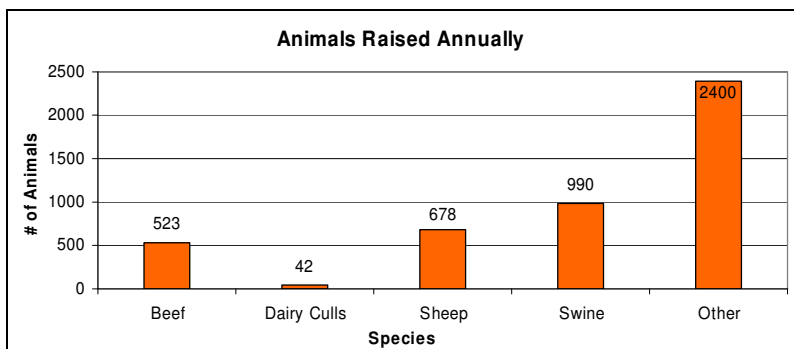


Figure 2. Southeastern MA 2006 Survey Results for Total Animals Raised Annually by Species

An alternative approach for estimating the volume of demand for slaughter and meat processing services would make use of total livestock numbers collected by the State or through the National Agricultural Statistics Service (NASS), rather than relying on this survey data, with its noted limitations⁵. Business planners could work with industry experts to determine what amount of the animal population by species would be headed to slaughter from Massachusetts every year. This estimate would take into account how many animals are bred, typical number of offspring per species, typical cull rate for young and mature animals, as well as how many would be slaughtered in-state versus sold at auctions to be slaughtered or raised elsewhere⁶.

⁵ NASS reports on number of cattle slaughtered (13,700) in New England in 2006, protecting individual slaughterhouse information by combining state-level data. As of 1/1/08 Massachusetts has the 3rd highest population of beef and dairy cattle after Vermont and Maine. <http://www.nass.usda.gov>

⁶ A study for the Hudson Valley calculates 35% of NASS inventory of “other cattle” for the target region as potential annual input for a slaughterhouse – the remainder being growing stock or feeder calves exported out of the region for finishing, and assumes 25% market penetration. Shepstone Management Company and Hudson Valley Livestock Marketing Task Force, *Meat Processing Facility Feasibility Study*, January 2000. p. 2-8.

The geographic distribution of current animal harvest numbers are illustrated by county in the maps below. While survey responses were highest from Franklin, Worcester, and Hampshire counties, Berkshire and Hampden also represent a substantial volume of animals.

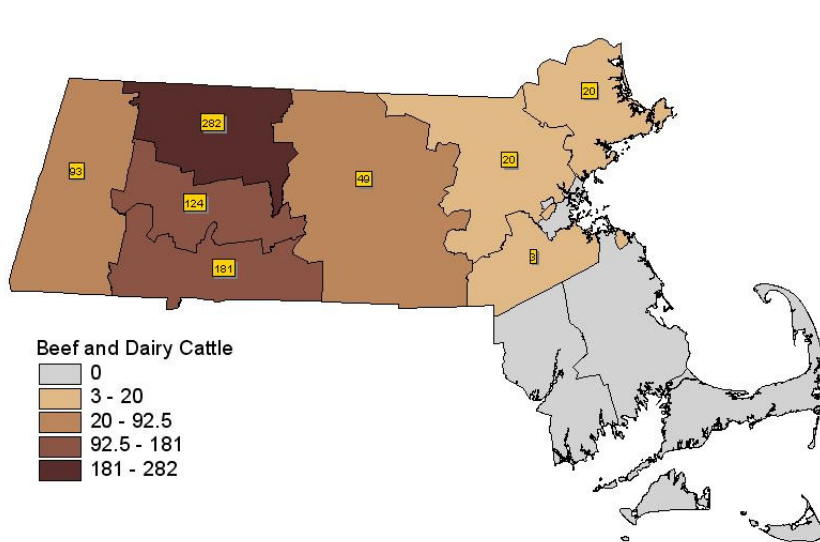


Figure 3. Annual Cattle Harvest by MA County

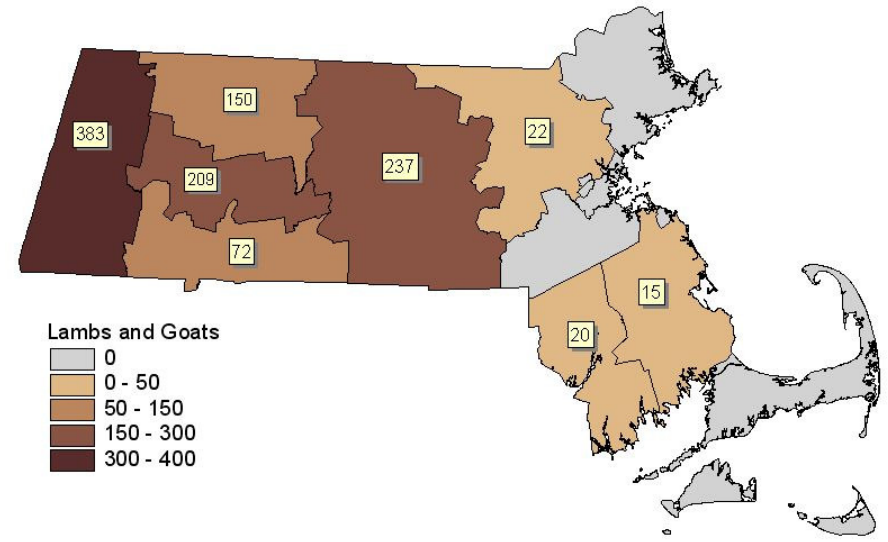


Figure 4. Annual Lamb and Goat Harvest by MA County

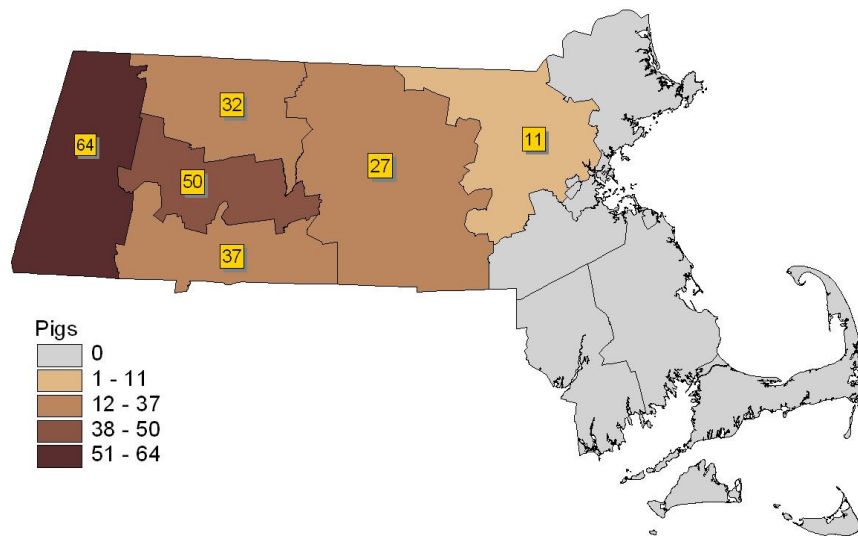


Figure 5. Annual Pig Harvest by MA County

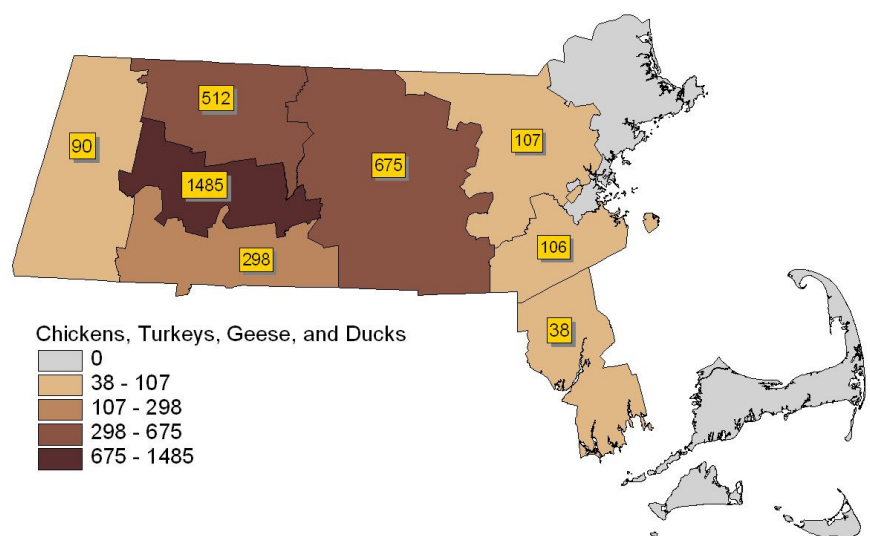


Figure 6. Annual Poultry Harvest by MA County

Seasonality

The seasonality of harvest is an important consideration for any slaughter or meat processing service. Fluctuations in the demand for services can dramatically impact the viability of an operation that relies on consistent capacity throughout the year in order to sustain the business and make efficient use of staffing and other overhead costs.

In some cases, quarterly tallies did not match the total “Current Annual Harvest” column. The research team did not adjust these numbers to ensure a match. When possible, the researchers contacted respondents to clarify their answers.

While we anticipated that January-March would have low demand for slaughter of beef cattle, the first quarter of the year was the designated harvest time for 160 cattle (or 27% of the 602 beef cattle that were reported by quarter).

Unfortunately, the other quarterly results (for April through December) may be invalid due to the inversion of quarterly columns on the first round of surveys distributed – the second, third, and fourth quarters were not listed chronologically as would be expected by respondents. We include them here, however, because we were able to validate the data with the top 20 largest beef producers and they had all filled in the survey accurately despite the misleading order. Also, from anecdotal cross-checking with beef growers, this distribution appears accurate – there is the least need for slaughter services in mid-summer when beef cattle have an abundance of pasture, and can be kept without too many costly inputs such as hay or other feed.

This data confirms the concern that seasonality is an important consideration for any slaughter or meat processing service in this region. The last quarter of the year is the peak harvest season for all animals surveyed except chickens and goats. Both spring and summer quarters show an annual harvest of roughly 80 fewer cattle and dairy culls than the peak season October – December.

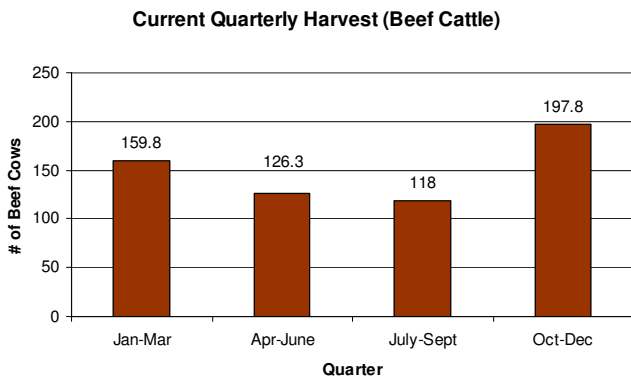


Figure 7. Current MA Quarterly Harvest- Beef Cattle

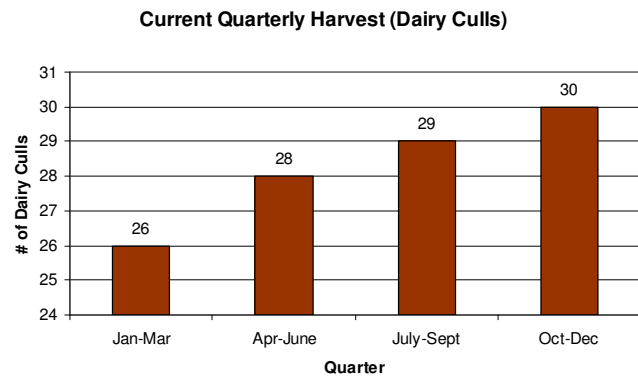


Figure 8. Current MA Quarterly Harvest- Dairy Culls

Current Quarterly Harvest (Lambs)

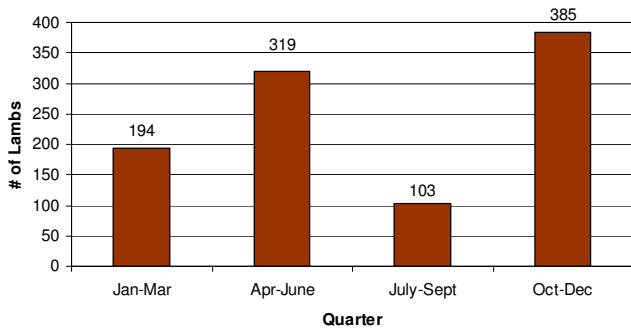


Figure 9. Current MA Quarterly Harvest- Lambs

Current Quarterly Harvest (Goats)

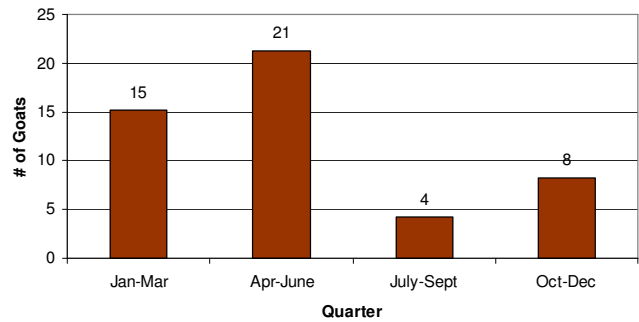


Figure 10. Current MA Quarterly Harvest- Goats

Current Quarterly Harvest (Chickens)

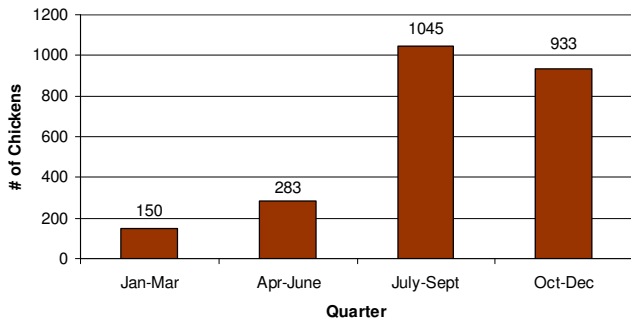


Figure 11. Current MA Quarterly Harvest- Chickens

Current Quarterly Harvest (Turkeys)

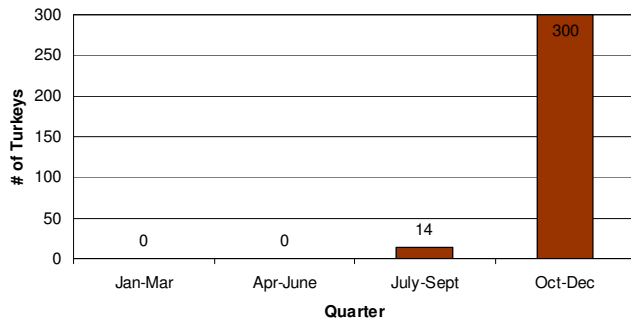


Figure 12. Current MA Quarterly Harvest- Turkeys

Current Quarterly Harvest (Pigs)

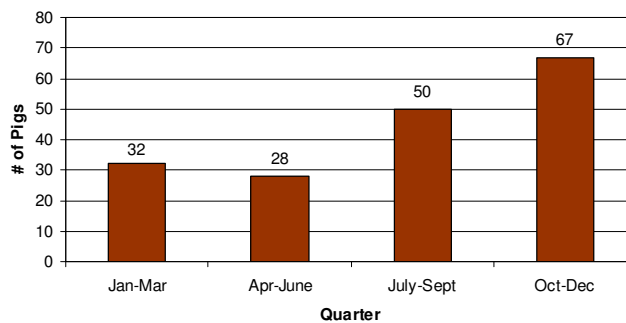


Figure 13. Current MA Quarterly Harvest- Pigs

This survey did not assess farms' willingness to adjust livestock and poultry production cycles to fill in for low volume slaughter periods in winter and summer months. However, the 2006 SMMP survey findings suggest that a majority of farms (56%) would be willing to adjust their production cycles to have their animals slaughtered during the months with typically slower demand for slaughter services (winter and summer), and 22% were not.

Projected Increases

Fifty-nine percent of respondents projected increases in the number of animals they would bring for slaughter and processing with “better access to a reliable USDA-inspected facility”⁷. *Table 4* shows that between 45 and 80% of the farms who responded (depending on the species) would expand their capacity and that these increases would result in over a doubling of production per species for most farms.

Table 4. Anticipated Increases in Annual Harvest MA

Species	% of farms anticipating increase in annual harvest with convenient facility ⁸	Average increase in harvest per farm (%)	Average increase in harvest per farm (# of animals)
Beef Cattle	63%	139%	7
Dairy Culls	63%	269%	7
Veal Calves	50%	267%	13
Lambs	70%	152%	19
Goats	80%	102%	10
Pigs	62%	112%	10
Chickens	58%	616%	305
Turkeys	45%	586%	188
Geese/Ducks	80%	127%	23
Other	50%	181%	147

For the SMMP study, 42% of survey respondents said they would increase the number of animals they raise if USDA inspected processing were available nearby, and 46% wouldn't increase. The SMMP group noted they learned through discussion that many producers are not aware of the marketing options and benefits provided by USDA inspection. We should also note that the SMMP study represented predominantly smaller producers who raise meat primarily for their **own use** (see *Figure 19*), and therefore have different - often more **flexible - processing** requirements, and may not see USDA inspection as a limiting factor in their production.

Opportunities and Threats for Increased Farm Capacity

Besides accessibility to a USDA facility, farmers noted other factors (e.g. access to land, cost of production, market opportunities) that would inhibit or enable them to expand production beyond their current capacity. Making full and efficient use of agricultural land, and increasing income-generating options for farmers, is high on the priority list for many northeastern states. If USDA-inspected slaughter and processing were accessible for more farms, states would need to consider how to remove these additional barriers, or make use of these enabling conditions, to reach the agricultural potential for the CT River Valley.

Access to land was the most common factor, and cost of production was the second most popular response, that would constrain or promote expansion of farm capacity. The 'Market Forces' category primarily includes responses regarding the demand for products. The market is probably one of the strongest determining factors in encouraging or inhibiting growth, but as the question asked respondents to assume that a viable market exists for the products, responses in this category are mostly likely underrepresented. Many individuals noted growth of specific or niche markets (e.g. organic veal market) and interest in regional marketing opportunities as key factors in their ability to expand.

⁷ This includes respondents who do not currently produce a particular species but anticipate harvest in the future.

⁸ This does not include respondents who noted no current harvest, but anticipated harvest in the future. The number of new producers was reported as follows: 10 for beef cattle, 3 for veal calves, 2 for lambs, 7 for goats, 12 for pigs, 9 for chickens, 9 for turkeys, and 4 for geese or ducks.

'Labor concerns' includes both availability of dependable and affordable labor as well as ability for the primary operator to manage the additional workload of increasing capacity. 'On-farm infrastructure' includes responses regarding increasing freezer storage space, increasing or rebuilding fences, and replanting abandoned pastures. The regulations farmers listed were all noted as inhibiting the farmers from potential expansion and included: state and local environmental laws, regulations on land use, zoning, and immigration laws.

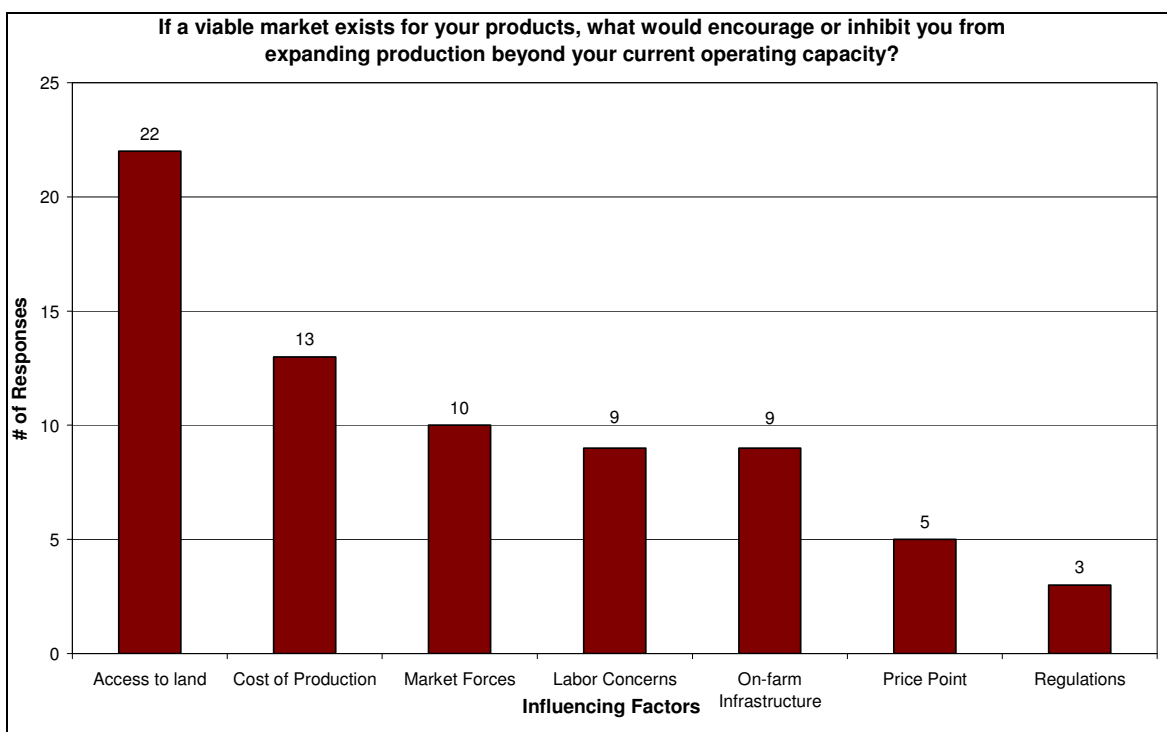


Figure 14. Factors that Encourage or Inhibit Farmers in Expanding Beyond Current Capacity

Travel Distances

Farmers face rising costs and increasingly difficult trips to bring their animals to slaughter. Farmers who transport their animals for slaughter travel an average of 52 miles one way. This means an average of 208 miles traveled to deliver each trailer of animals and pick up finished products. A large number of the respondents (see below) currently use custom slaughter facilities, and are therefore may be able to commute to and from slaughterhouses in their area rather than traveling longer distances to the few USDA-inspected facilities in the region.

USDA vs. Custom

A majority (54%) of respondents stated that they use USDA-inspected facilities for slaughter, 38% use custom slaughterhouses, and 6% used both types of services⁹.

In the 2006 SMMP survey, 73% of the 98 respondents to this question used **custom** slaughterhouses, only 21% used USDA slaughterhouses, and 7% used both.

⁹ This question had an 87% response rate (97 responses), and two percent of the responses listed only a state location with no town or facility name.

Desired Qualities of Slaughter and Processing Facilities

When asked about desired qualities of a proposed slaughter or processing facility, the most common responses were location and scheduling¹⁰. Eighty-six percent of the survey respondents (98 individuals) answered the question regarding slaughter facility qualities, and 63% (71 respondents) answered regarding processing facility characteristics. The following graphs illustrate the full question as well as the most common responses by total number of respondents listing a particular quality. Both questions were open-ended, and many respondents noted several desired qualities.

Location and scheduling were the most frequently reported qualities for both slaughter (*Figure 15*) and processing facilities (*Figure 16*). While communications could be considered an element of customer relations, these categories are distinguished in this report as separate attributes for the sake of specificity. ‘Customer relations’ represents responses regarding professional service (e.g., professionalism, good service, open to customer inspection) as well as characteristics of the staff and operation (e.g. reliable, trustworthy, honest, pleasant personnel). As one respondent noted, “We do need facilities, but... we need honesty in these facilities and then confidence in their services”. Meat tracking included responses such as “assurance we get our own animal back” and “accountability – I want my own meat back”.

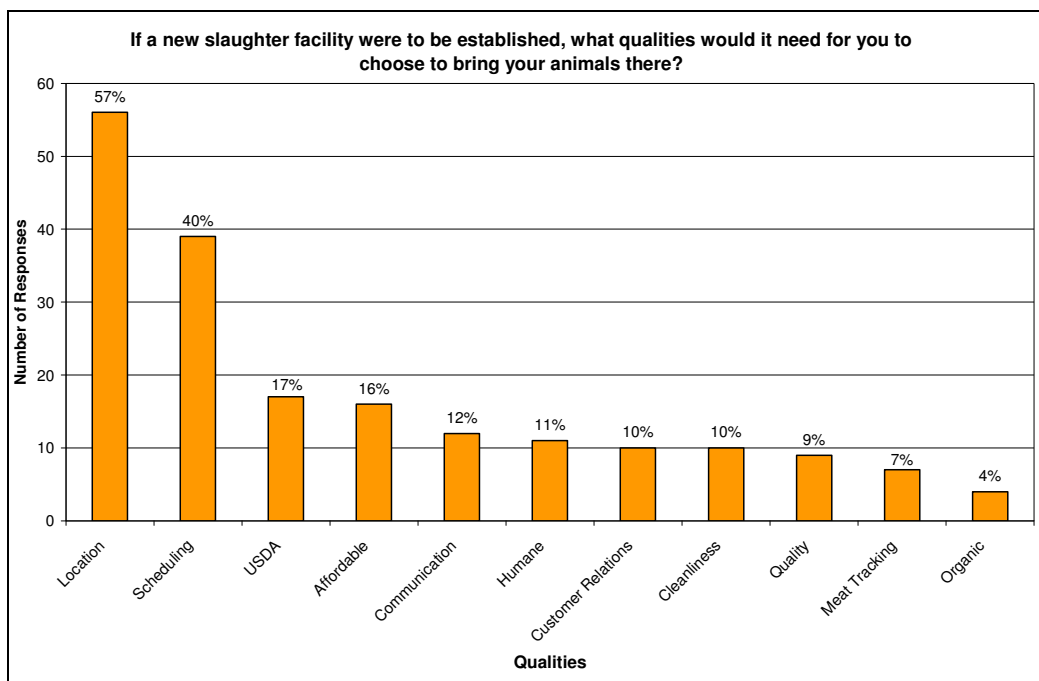


Figure 15. Qualities Desired for New Slaughter Facility

Many respondents indicated that they desired the same qualities from processing facility as they would a slaughterhouse and did not provide separate answers for each question. For those that differentiated between the types of services, communication was a more common response for processing, and the topic of packaging became prominent.

¹⁰ The full question read: “If a new processing facility were to be established, what qualities would it need for you bring your animals there? e.g.: Better scheduling? Better communication? Located closer to your farm? Other?” It should be noted that the two most popular “qualities” identified by respondents for slaughter facilities - and the three most popular “qualities” for processing facilities - were provided as examples as part of the question. These examples could have lead responses and skewed results toward those categories. Several respondents circled these examples or wrote “all of the above”.

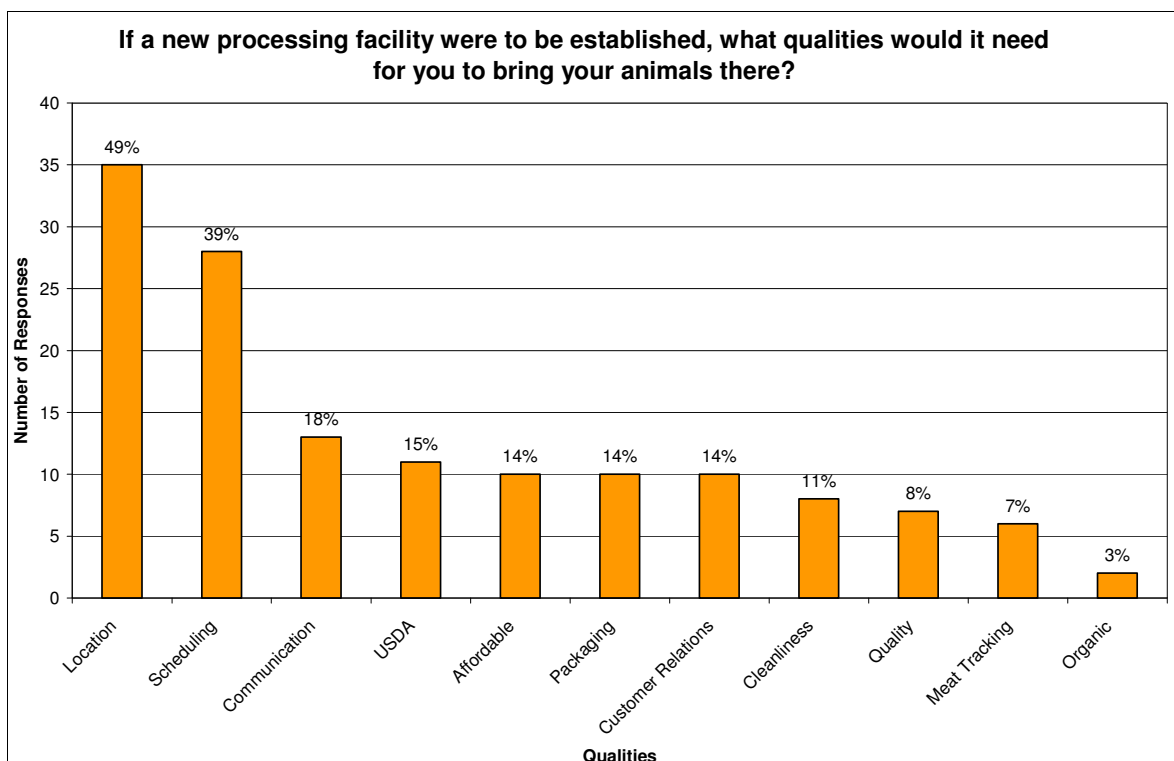


Figure 16. Qualities Desired for New Processing Facility

Location

Location was the most commonly noted quality desired in a new slaughter or processing facility, representing 56 farms. Of those farms, the majority (36%) reside in Franklin County.

Table 5: Total Number of Farms Indicating Location as Important Quality for a Slaughter/Processing Facility by County

County	# of Farms
Franklin	20
Hampshire	10
Worcester	10
Hampden	6
Berkshire	4
Middlesex	3
Bristol	1
Essex	1
Norfolk	1
Plymouth	1
Unknown	4
Total	56

Specific Services

Farmers noted several services that would convince them to go to a new slaughter and processing facility. The services in highest demand include: cryovac and vacuum packaging, aging, and smoking. Other services that were noted by at least two surveys include: curing, skinning, labeling, and minimal or no use of chemical preservatives.

The SMMP study revealed interest in different value-added meat processing as follows. Forty-three percent of respondents were interested in the processing of smoked meat products, 20% in sausage and cryovac packaging, and 7% hot dogs.

Target Markets and Attributes

Grass-fed or pastured, naturally-raised, local, and specialty breed are the most common attributes used by survey respondents to market their meat products. These characteristics may influence farmers’ demands for different types of services from slaughter/processing facilities, and indicate the attributes of throughput from which a slaughterhouse could develop its own brand of meat.

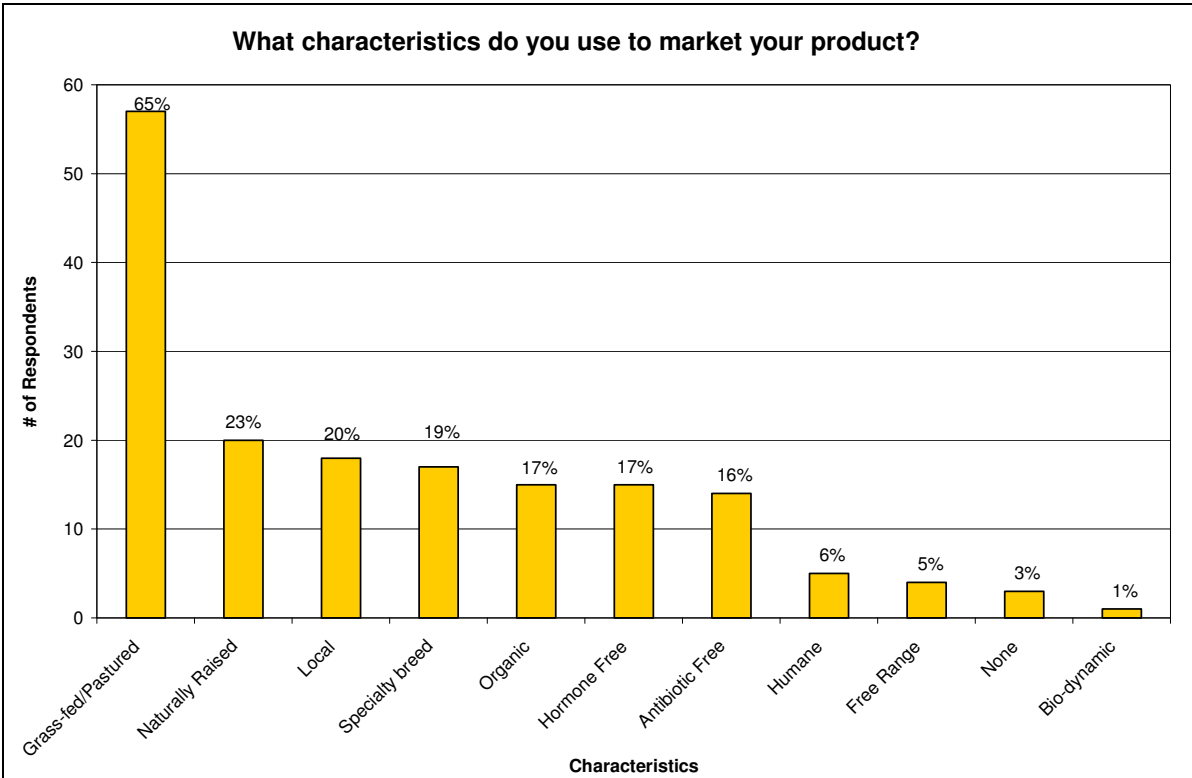


Figure 17. Marketing Attributes Used by Respondents to Promote Meat Products

We wanted to get a sense of how many survey respondents were willing to sell their animals wholesale versus those committed to selling their meat products through their own brand. The majority of respondents were interested in selling their animals or specific cuts to a slaughter/processing facility. This means that a slaughter/processing business might be able to balance thin margins with an additional revenue stream such as direct retail of slaughterhouse branded meat.

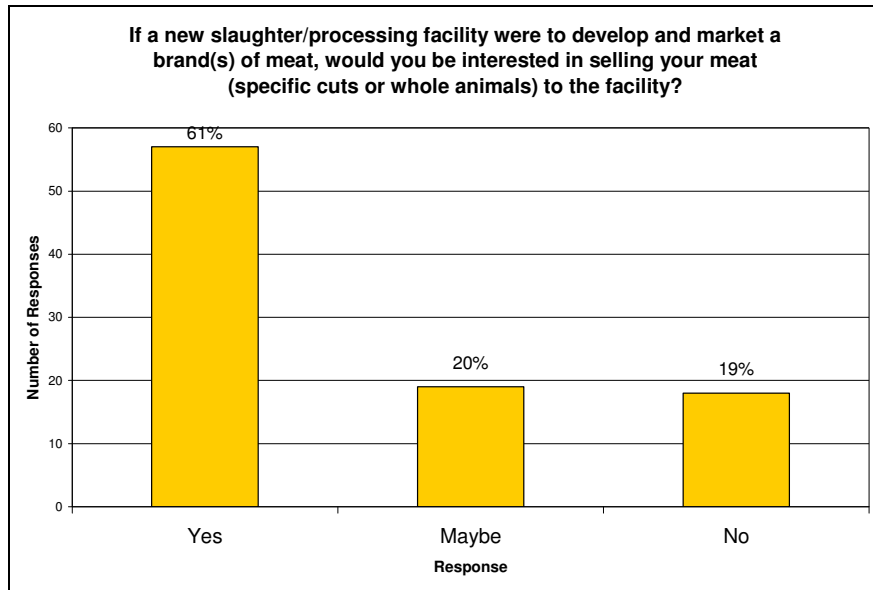


Figure 18. Interest in Wholesaling Animals or Meat to Slaughter/Processing Facility

In the Southeastern Massachusetts study, most respondents raised meat animals for their own consumption, and four times fewer respondents sold their meat retail or wholesale¹¹.

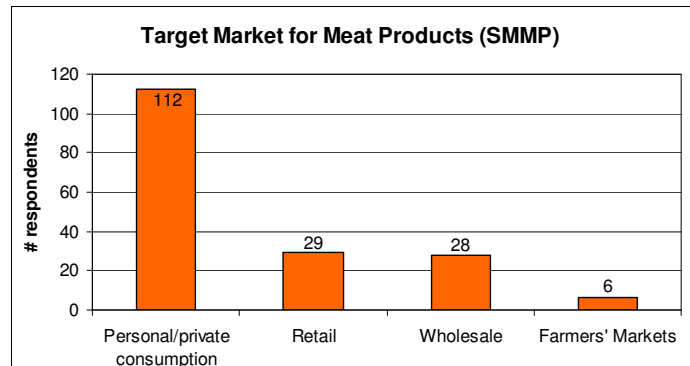


Figure 19. Target Market for Meat Producers in Southeastern Massachusetts (2006)

Conclusions

These survey findings can serve the purposes of a wide range of agricultural partners, and inform efforts to support farms that raise animals for meat in the Connecticut River Valley. This data can also serve as a resource for current and potential service providers to better understand their customer's needs. The overarching conclusions that we have drawn from this set of data include:

- There is significant **demand** for slaughter and processing services, and potential supply of inputs for slaughter/processing services.

In the five counties of central and western Massachusetts alone (those most represented by our survey findings) the survey suggests there are at least 730 cattle, 1050 small ruminants, 210 hogs, and 3,060 poultry that go to slaughter annually.

¹¹ SMMP's survey question regarding the target market and end use of meat animals: "You currently raise meat animals for: yourself __ retail __ wholesale __ farmers market __ other (explain) __"

- There is an opportunity for substantial **growth** of farms and improved farm viability, if the slaughter and processing bottleneck can be resolved.
59% of survey respondents would expand their operation with better access to a reliable USDA-inspected facility (depending on species), on average more than doubling the production on their farms.
- The farming community is characterized by predominantly **small**, somewhat diversified farms. This has implications for scheduling and slaughterhouse efficiencies, but also infers that servicing these farms is that much more significant because it would impact more farm businesses and landowners.
50%-86% of respondents who own cattle or small ruminants send 1-10 animals (of any particular species) to slaughter every year, 14-50% of respondents send 11 animals or more. 49% of respondents raise at least two species of animals.
- **Location** is the major factor for farmers deciding where to bring their animals for slaughter, and siting should consider the **distance** of farms and how to service them most efficiently. Larger facilities should take the regional context and animal harvest numbers into consideration.
Location was the most commonly noted quality desired in a new slaughter or processing facility, with 57% of respondents. Of those farms, the largest portion (36%) reside in Franklin County.
- **Seasonal** fluctuations in demand for slaughter and processing are significant, and would pose a challenge to a small facility. Incentives might encourage growers to adjust their scheduling for low demand periods (e.g. mid-summer).
For all species except for chickens and goats, the last quarter of the year is the busiest slaughter season. The high season for beef cattle slaughter (Oct-Dec) has 68% higher volume than summer (July-Sept)¹². Differences between highest and lowest seasons for other species are 267% for small ruminants and 139% for pigs. The majority of farmers (56% of respondents) in the 2006 SMMP survey are willing to have their animals slaughtered during winter and summer months, but it may take operations some time to shift their harvest schedule.
- **Scheduling, affordability, customer service** and quality assurance are high priorities for slaughter facility customers.

¹² Quarterly results for April through December may be invalid due to the inversion of quarterly columns on the first round of surveys distributed. See the *Seasonality* section for more details.

Survey Tool

Survey: Demand for Slaughter and Processing Services

ZIP code: _____

1. I currently raise livestock and arrange for slaughter/processing : Yes / No
2. I have the potential and interest to raise livestock and arrange for slaughter/processing: Yes / No

HARVEST CAPACITY

3. Please complete the table (below) with answers to the following questions:
 Column A: How many animals do you harvest per year?
 Column B: How many animals do you harvest in each 3-month period?
 Column C: How many animals could you harvest in the future with better access to a reliable USDA-inspected facility?

	A	Current Quarterly Harvest				C
	Current Annual Harvest (#)	Jan-Mar	Apr-June	Jul-Sept	Oct-Dec	Anticipated Annual Harvest with convenient facility (#)
Beef Cattle						
Dairy Culls						
Veal						
Goat						
Pigs						
Turkey						
Chicken						
Lamb						
Geese / Duck						
Other _____						

4. If a viable market exists for your products, what would encourage or inhibit you from expanding production beyond your current operating capacity? (apart from access to slaughter and processing services?)

SLAUGHTER

5. Where do you currently have your animals slaughtered? (Name, Town & State)
6. If applicable, how many miles do you have to travel ONE WAY to deliver your livestock?
7. What is the estimated cost per animal for slaughter? (Specify species)
8. If a new slaughter facility were to be established, what qualities would it need for you to choose to bring your animals there? e.g.: Better scheduling? Better communication? Located closer to your farm? Other?

PROCESSING

- 9. Where do you currently have your meat processed? (Name, Town & State)
- 10. If applicable, how many miles do you have to travel ONE WAY for processing?
- 11. What is the estimated cost per animal for processing? (Specify species)
- 12. If a new processing facility were to be established, what qualities would it need for you bring your animals there? e.g.: Better scheduling? Better communication? Located closer to your farm? Other?

MARKETING & DISTRIBUTION

- 13. Where do you currently sell your finished meat? (e.g. to processing plant, direct retail, farmers' market, on-farm store, wholesaler/distributor, restaurants, institutions)
- 14. What characteristics do you use to market your product? (e.g. grass-fed, specialty breed, organic)
- 15. If a new slaughter/processing facility were to develop and market a brand(s) of meat, would you be interested in selling your meat (specific cuts or whole animals) to the facility?

ADDITIONAL ISSUES

- 16. If the slaughter/processing facility were to manage the transportation of live animals from farm to facility, would you find this helpful?
- 17. Any comments?

If you wish, please provide the information below, and we will send you updates on the project.

Name: _____ Street/PO Box: _____

Farm: _____ Town, Zip Code & State: _____

Phone: _____ Email: _____