Meat Production And Processing

Infrastructure and Labor Study In The Central and South Puget Sound Region

Pierce County

THURSTON COUNTY
WASHINGTON
SINCE 1852

EXECUTIVE SUMMARY

Livestock producers throughout the nation face many challenges obtaining slaughter and meat processing services. Producers may need to transport their livestock long distances for slaughter and meat processing services, or they may have difficulty scheduling for services in times of high demand. Slaughter and meat processing businesses also struggle to satisfy producer demand for services due to labor shortages and inadequate infrastructure and equipment. In addition, setting the cost of slaughter and meat processing low enough for producers to pay but high enough to cover costs and generate adequate income is a difficult business decision.

While labor shortages, aging infrastructure, and equipment have been challenges facing the meat industry nationwide, particularly during the pandemic, Pierce and Thurston counties have issues and solutions that are unique to the central and south Puget Sound region, specifically Pierce, Thurston, Lewis, Grays Harbor, Mason, Kitsap, King, and Snohomish counties (the region). To better understand these unique challenges and potential solutions, Pierce and Thurston counties have partnered with their consultant, Maul Foster & Alongi (MFA), to identify regional issues and provide recommendations for consideration by local governments to support meat production and processing.

APPROACH

To identify needs and solutions for the meat industry in the region, Pierce and Thurston counties partnered with MFA to conduct a study that includes the following:

- A literature review of the meat production and processing industry logistics and policies.
- Direct stakeholder feedback from 67 farms and 14 slaughtering and processing facilities.
- GIS analysis of current producer, processor, and slaughterer locations throughout the region.

FINDINGS

Key barriers reported by producers, processors, and slaughterers are captured in the table below.

TABLE ES-1: BARRIERS.

BARRIERS	PRODUCERS	SLAUGHTERERS	PROCESSORS
Limited availability of services	●		
Need for advanced scheduling	●	●	●
Cost	●		●
Available land	●		
Available equipment to haul animals	●		
Experience and education gap	●		
Waste management		●	●
Facility/equipment challenges		●	
Varying capacity (seasonality)		●	●
Fuel and travel time		●	
Storage space			●
Labor challenges			●
Expanding capacity			●

GIS analysis showed that driving distances to United States Department of Agriculture (USDA)-licensed slaughtering and processing (S&P) services can be more than 100 miles for some producers. Most meat products must be slaughtered and processed at USDA-licensed facilities for cuts of meat to be sold in retail outlets. Some processing, butchering, and packaging of USDA-inspected meats can occur at facilities that meet the Retail Exemption to federal regulations (See Appendix A Figure A-1). Lack of USDA-licensed S&P facilities in the region is a major constraint limiting marketing opportunities for the region's producers. Although S&P facilities licensed by the Washington State Department of Agriculture (WSDA) are more conveniently located throughout the region, the marketing potential of meat processed at a WSDA-licensed custom-exempt facility is very limited because it does not allow for the sale of packaged cuts of meat. Only animals that were sold before slaughter can be processed at a WSDA-licensed custom meat shop and can only be processed for the owner(s) of the animal for their personal use. Some states have opted for state meat and poultry inspection programs to increase intrastate retail opportunity for state-inspected meat (see Appendix B).

RECOMMENDATIONS

The following recommendations are informed by stakeholder feedback, policy research, GIS analysis, and review of solutions in other regions. It is important to note that the goal of this study was to provide actionable recommendations, but additional resources, funding, and partnership development would be needed to implement the recommendations and actions noted below.

- **New S&P facilities:** Invest in additional S&P facilities, for fixed facilities and mobile slaughtering units (MSUs), to help make S&P services more accessible and help increase opportunities for producers to sell their meat products.
  - » **County Actions:** Share recommended general locations with industry partners, pursue a feasibility study, and identify possible funding opportunities
- **S&P scheduling portal:** Create a scheduling portal serving producers, processors, and consumers regionwide. The portal would allow users to view and schedule times with S&P services and could help producers find services more easily that fit their schedules and match their preferred driving distance. Processors can benefit by more easily filling cancelled appointments, reducing lost time, and wasted resources.
  - » **County Actions:** Identify private industry partners to develop S&P scheduling portal on behalf of the region, help identify and apply grant funding, and assist with outreach to introduce local producers and S&P facilities to the scheduling portal.
- **Central service hub:** Create a central service hub with a fixed S&P facility or the ability to regularly accommodate MSUs to reduce the distance producers need to transport their livestock to both USDA-licensed and WSDA-licensed S&P services. Hubs should be designed with the fixed infrastructure needed by MSUs and could include a lending library of trailers for transporting animals to slaughter. These sites could potentially, and provide controlled access to cold storage and other equipment.
  - » **County Actions:** Identify private industry partners to run a lending library, identify possible funding opportunities, and support local producers by helping secure grant funding to expand infrastructure like holding pens and concrete slabs for MSUs.

- **State policy:** Advocate for state legislation that creates cooperative programs like a meat and poultry inspection (MPI) program and cooperative interstate shipping (CIS) program. An MPI program can allow for S&P facilities with federally equivalent inspection processes to prepare meat for retail sales throughout Washington State. A CIS program enables state-inspected meat to be sold in interstate commerce and exported to other countries.
  - » **County Actions:** Gauge interest of regional stakeholders in pursuing policy changes in future legislative sessions. If regional support exists, collaborate with industry experts and elected officials to identify financial barriers that prevented the MPI program described in SB 5045 from passing in 2021 and collaborate with other states that have MPI and CIS programs – Oregon and Montana – to explore the benefits and drawbacks of their cooperative programs.
- **Increase capacity through state grants:** Support producers and processors in applying for, matching, and managing state grant funds for equipment upgrades and increased storage space.
  - » **County Actions:** Advocate for additional funding if there is stakeholder support.
- **Increase infrastructure through federal grants:** Support processors in acquiring federal funding to upgrade from WSDA- to USDA-licensed S&P facilities or build new USDA-licensed S&P facilities. Support processors with applying, matching, and managing federal grant funds.
  - » **County Actions:** Support bills and advocate for additional funding if there is stakeholder support.
- **Mentorship program:** Establish a mentorship program to help onboard new producers, share necessary information for successfully entering the meat production industry, and help establish business relationships with S&P service providers and consumers.
  - » **County Actions:** Identify funding and interested partners, like the NW Meat Processors Association, local conservation districts, WSU-Extension offices, technical schools, and outreach organizations to develop new programs and/or expand existing programs.

- **Apprenticeship program:** Establish an apprenticeship program to recruit and train new S&P workers for career positions.
  - » **County Actions:** Identify funding and interested partners, like the NW Meat Processors Association, technical schools, and outreach organizations to develop new programs and/or expand existing programs.

- **Marketing and Purchasing of Custom-Exempt Meat:** Expand demand for WSDA-licensed custom-exempt meat through advertising and decreasing barriers to purchasing large quantities of meat.
  - » **County Actions:** Partner with WSDA to produce outreach and marketing materials to encourage consumers to purchase custom-exempt meat directly from farmers. Further study barriers to purchasing custom-exempt meat like consumers' understanding of the purchasing process and limited refrigeration space.

- **Buffalo and Beefalo:** Expand consumer demand for exotic animals, like buffalo and beefalo (a 3/8 bison and 5/8 domestic cattle crossbreed), through advertising and support producers through grant and technical assistance to begin raising buffalo and beefalo.
  - » **County Actions:** Gauge interest in raising buffalo and beefalo and help increase consumer demand through marketing. Determine if regional S&P operations are equipped and trained to handle these species.

NEXT STEPS

Pierce and Thurston counties will make this report available to all producers, processors, slaughterers, and partners who engaged in this study. The project team presented findings to the Pierce County Council and Thurston Board of County Commissioners in July 2023 prior to submitting the final report to these bodies. Pierce and Thurston counties will take the following next steps through the end of 2023 to begin refining and prioritizing recommendations:

- Distribute copies of the final report across the study area to local, state, and federal partners, and food system partners.
- Conduct a briefing with the Pierce County Agriculture Advisory Commission and any other official bodies in the sponsoring counties.
- Consult with interested stakeholders to clarify study findings and recommendations as requested.

It is important to note that additional resources, funding, and partnership development would be needed to develop a work program to implement the recommendations noted above and prioritize a preferred slaughtering and processing site for Pierce and Thurston County collective support.

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ACRONYMS AND ABBREVIATIONS

CIS	cooperative interstate shipping
FMIA	Federal Meat Inspection Act
FSIS	Food Safety and Inspection Service
MFA	Maul Foster & Alongi, Inc.
MPI	meat and poultry inspection
MPU	mobile processing unit
MSU	mobile slaughtering unit
the region	central and south Puget Sound region.
S&P	Slaughter and Process(-ing)
SB	Senate Bill
USDA	United States Department of Agriculture
WSDA	Washington State Department of Agriculture
WSU	Washington State University

GLOSSARY OF TERMS

Animals—refers to cattle, pigs, sheep, and goats.

Custom Meat Exemption—a federal exemption that allows producers to sell animals, while still living, directly to consumers. Animals sold through this exemption are called "custom meat" and are intended only for the personal household use of the (new) owner of the livestock (no resale allowed). Custom meat is exempt from inspection and can be slaughtered and processed at WSDA-licensed facilities rather than USDA-licensed facilities.

Driveshed analysis—analyzing the accessibility of an area by driving the road network in any direction from a point location.

Exotic animals—includes reindeer, elk, deer, antelope, water buffalo, bison, buffalo, or yak, under 9 C.F.R. § 352. Exotic animals can be sold within Washington State when slaughtered and processed at a WSDA-licensed food processing facility or under voluntary inspection at a USDA-inspected plant and at the request of the animal owner. Washington Department of Fish and Wildlife limits commercial raising of some exotic animals and import of some live exotic animals.

Federal Meat Inspection Act of 1906 (FMIA) and the Wholesome Meat Act of 1967—sets rigorous standards for the inspection, labeling, and packaging of meat products to protect public health and help ensure the safety of meat products available for purchase. The act applies to cattle, sheep, pigs, and goats (collectively referred to in this report as livestock, animals, or meat). The USDA is responsible for inspection requirements of the FMIA, 21 U.S.C. § 601 et seq. (1906).

Fixed Slaughter and Process (S&P) Facility—A fixed S&P facility refers to a brick-and-mortar S&P facility or a Mobile Slaughter Unit (MSU) that has been fixed in place to a concrete slab and operates exclusively from one location rather than moving from site to site.

Food Safety and Inspection Service (FSIS)—an agency of the USDA. Under authority of the FMIA, FSIS inspects and monitors all meat, poultry, and egg products sold in interstate and foreign commerce to ensure compliance with mandatory federal food safety standards and inspection legislation.

Livestock—refers to cattle, pigs, sheep, and goats.

Meat—includes meat from cattle, pigs, sheep, and goats.

Producer—a business that raises livestock for commercial purposes, especially a ranch or farm.

Slaughter and Process (S&P)—the tasks required to kill livestock and process their carcasses into meat products that are packaged and labeled. These tasks are carried out at facilities often called slaughterhouses and meatpacking plants.

Mobile Slaughter Unit (MSU)—self-contained slaughter facilities, built on trailers or as custom vehicles that can travel from site to site. Some MSUs operate from fixed locations as well. The term mobile processing unit (MPU) is sometimes used interchangeably with MSU in the meat processing industry.

United States Department of Agriculture (USDA)—the USDA, through the FSIS, is responsible for ensuring that the United States's commercial supply of meat, poultry, and egg products is safe and correctly labeled and packaged. Livestock must be slaughtered and processed at plants inspected by the USDA for meat products to be sold commercially.

Washington State Department of Agriculture (WSDA)—the WSDA Food Safety Program licenses businesses to slaughter and process livestock under the custom meat exemption. The meat from animals processed at a WSDA-licensed Custom Meat Facility is called "custom meat" or "uninspected meat" because it is not inspected.

INTRODUCTION

OVERVIEW

Livestock producers throughout the nation face many challenges obtaining slaughter and meat processing services. Producers may need to transport their livestock long distances for slaughter and meat processing services, or they may have difficulty scheduling for services in times of high demand. Slaughter and meat processing businesses struggle to satisfy producer demand for services due to labor shortages and aging infrastructure and equipment. In addition, setting the cost of slaughter and meat processing low enough for producers to pay but high enough to cover costs and generate adequate income is a difficult business decision.

Nationally, four large meat processing companies control 85 percent of the beef market (White House 2022). These large companies buy from farmers and sell to retailers like grocery stores, making them a bottleneck in the food supply chain. A natural disaster or other disruptions can result in closures of key slaughter and processing facilities; this leaves producers struggling to quickly find other slaughter and processing facilities for their livestock and consumers unable to find adequate supply of meat products in stores and restaurants.

PROBLEM STATEMENT

While labor shortages, inadequate infrastructure, and equipment needs have been challenges facing the meat industry nationwide, particularly during the pandemic, Pierce and Thurston counties identified issues and solutions that are unique to the central and south Puget Sound region, specifically Pierce, Thurston, Lewis, Grays Harbor, Mason, Kitsap, King, and Snohomish counties (the region). To better understand these unique challenges and potential solutions, Pierce and Thurston counties have partnered with their consultant, Maul Foster & Alongi, Inc. (MFA), to identify regional issues and provide recommendations that can be taken by local governments to support our meat producers and processors.

OBJECTIVES

The purpose of this study is to better understand the key constraints of the meat processing industry and provide county decision-makers with actionable recommendations to support strategic investments in the industry. The objectives are to do the following:

- **Summarize constraints** impacting processing capacity for regional livestock producers.

- **Provide actionable recommendations** that address industry challenges.
- **Identify locations** for additional slaughtering and processing (S&P) facilities to serve regional livestock producers.
- **Identify funding resources and programs** to support producers and processors.

STUDY AREA

Producers and processors within Pierce, Thurston, Lewis, Grays Harbor, Mason, Kitsap, King, and Snohomish counties (the region) are the primary focus of the study (See Figure 1). The study also includes a selection of S&P facilities, particularly USDA-licensed S&P facilities, located outside the region that provide significant services for regional producers willing to travel longer distances, and includes producers outside the region that participated in the March 2023 producer survey. Pierce and Thurston counties are the focal points of the study area.

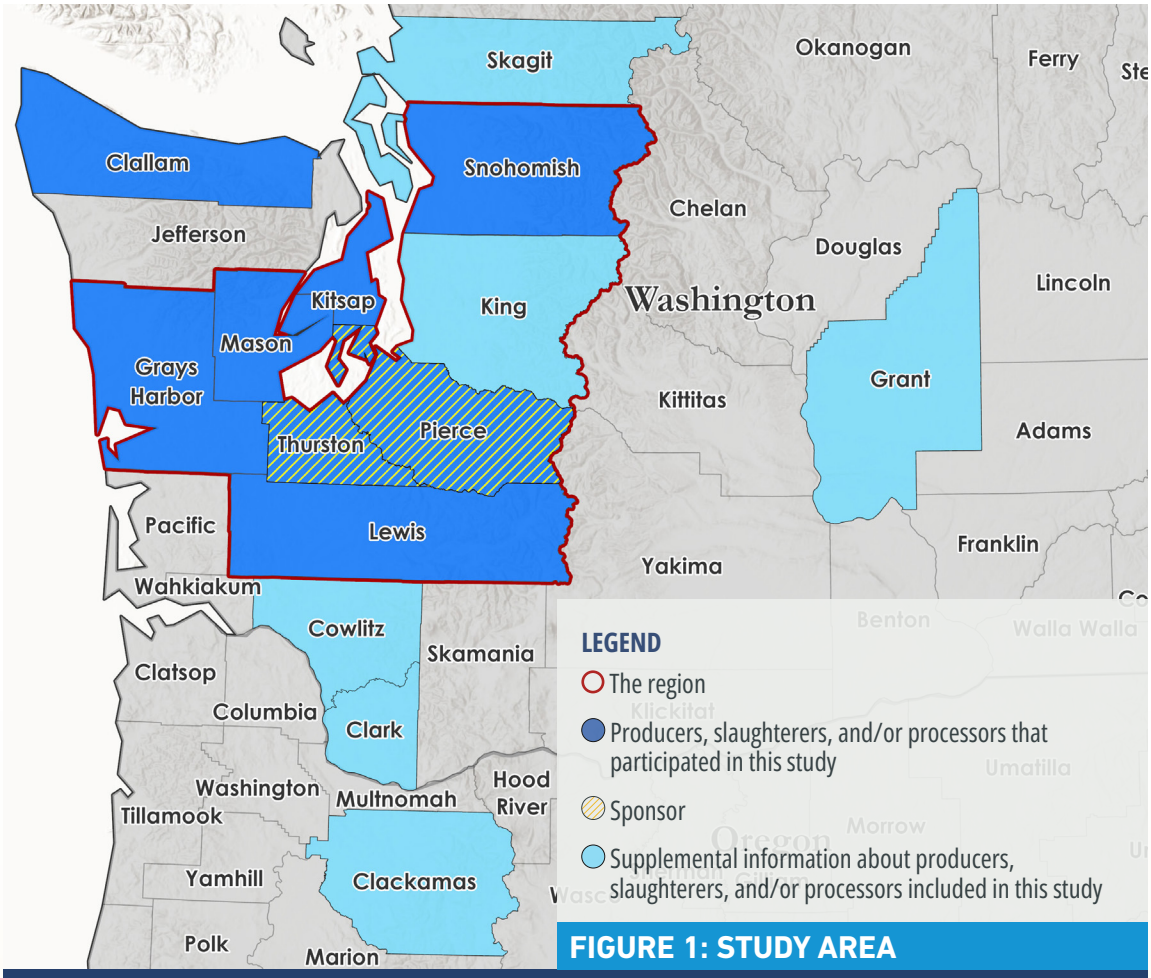
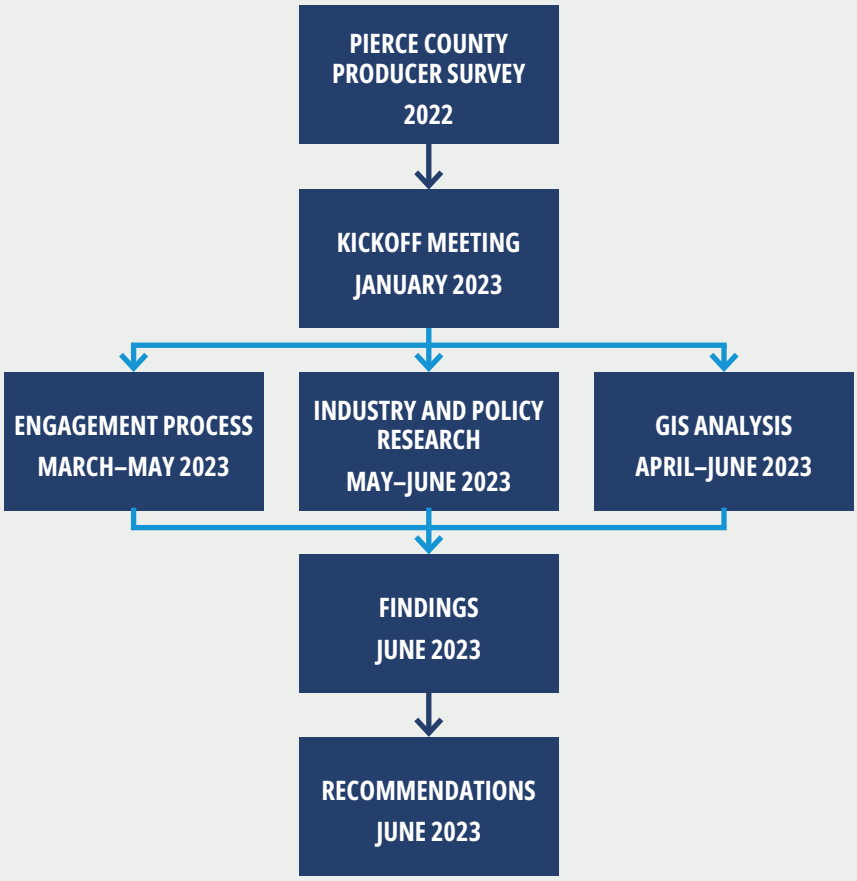


FIGURE 1: STUDY AREA

The study area includes meat producers and S&P facilities in the region, S&P facilities outside the region that serve producers in the region, and producers outside the region that participated in the March 2023 producer survey.

To identify needs and solutions for the meat industry in the region, Pierce and Thurston counties partnered with MFA to conduct a study that began in January 2023 with regional partners. The study was launched as a result of preliminary data from Pierce County's 2022 survey of 42 producers and landowners, and combines industry and policy research with direct stakeholder feedback from 67 farms and 14 S&P facilities. It also includes GIS analysis of current producer, processor, and slaughterer locations throughout the region to develop key findings and actionable recommendations (See Figure 2).

FIGURE 2: APPROACH TO MEAT PROCESSING STUDY



ENGAGEMENT PROCESS

The engagement process built on past engagement about producer barriers and constraints by the Washington State Department of Agriculture (WSDA) through their 2022 statewide survey of 54 processors, Pierce County through their 2022 survey of 42 producers and landowners, and Washington State University (WSU) through their 2019 Peninsula Survey of 77 producers throughout western Washington. Analysis and details of past surveys can be found in Appendix C.

To launch the 2023 study, Pierce and Thurston counties invited 15 regional partners to the January 2023 virtual kickoff meeting to collaborate on the process and assist with engaging their producers, processors, and slaughterers in engagement. While not all partners listed below could join the kickoff, all partners were key in helping identify variables of interest and/or distributing the survey to their communities of producers, processors, and slaughterers.

TABLE 1: PROJECT PARTNERS.

PARTICIPANT	SERVICE TYPE
Grays Harbor Conservation District	Education and Assistance
King-Pierce Farm Bureau	Industry Support, Education, and Assistance
King County Agriculture Program	Regulation, Education, and Assistance
Lewis County Farm Bureau	Education and Assistance
Lewis Conservation District	Education and Assistance
Mason Conservation District	Education and Assistance
Northwest Agriculture Business Center	Education, Assistance, and Industry Support
Northwest Meat Processors Association	Industry Support, Education, and Assistance
Pierce Conservation District	Education and Assistance
Pierce County Agriculture Program	Regulation, Education, and Assistance
Snohomish County Agriculture Program	Regulation, Education, and Assistance
Thurston County Agriculture Program	Regulation, Education, and Assistance
Thurston Conservation District	Education and Assistance
Washington State Department of Agriculture Regional Markets Program	Regulation, Education, and Assistance
Washington State University Thurston County Extension Office	Education and Assistance

Following the virtual kickoff meeting, Pierce and Thurston counties surveyed regional producers in mid-March 2023, and built on the 2022 survey engagement of producers and landowners by Pierce County. The 2023 survey received 67 responses. Following the completion of the survey, producers were invited to attend a virtual 90-minute focus group on the evening of either April 13 or April 18, 2023. The focus group discussions centered on the barriers producers faced in slaughtering and processing animals, and pathways to potential solutions. A total of 13 participants representing 11 farms participated (captured in Table 2 below).

TABLE 2: FOCUS GROUP PARTICIPANTS.

PARTICIPANT	SERVICE TYPE
Bright Ide Acres	Producer
Canfield Farms	Producer
Colvin Ranch	Producer
Harlow Cattle Company	Producer
Hercules Farm	Producer
North Prairie Ranch	Producer
Riverbend Ranch	Producer
Tracking Y Ranch	Producer
Withywindle Valley Farm	Producer
Thurston County Youth Market Animal Sales	Producer
Rainier Valley Wagyu	Producer

A survey of processors and slaughterers followed in late March 2023. Given the time constraints for this group, Pierce County primarily gathered data through follow-up one-on-one phone calls to both fill out the survey and ask follow-up questions to gather the information needed. Six slaughterers participated, two processors participated, and six slaughterer-processors participated.

INDUSTRY AND POLICY RESEARCH

MFA conducted a literature review of United States Department of Agriculture (USDA) and WSDA publications along with conservation district, WSU-Extension, and other technical assistance organization's publications to create a description of the industry landscape and provide context for the stakeholder engagement responses and GIS analysis (Appendix A). Research identified known challenges to meat production, processing, marketing, and available technical assistance and support. Research on the meat inspection system focused on the difference between USDA-inspected and WSDA-licensed services. Policy research included legislation that had recently been introduced or passed in Washington State as well as legislation that other states have used to strengthen their local meat industry. Research about available funding included federal and state sources.

GIS ANALYSIS

MFA developed a GIS knowledge base to examine the spatial relationships between producers and processors. The knowledge base is a web mapping application that includes point locations of producers and processors, information about each provided by authoritative sources (e.g., USDA, WSDA), and stakeholder engagement. Point locations are mapped from latitude and longitude coordinates or geocoded from street addresses. For a small number of producers, zip code was the best available location information, and in those cases a point at or near the center of the zip code area was used. These point locations serve as the basis for the spatial analyses that informed the findings and recommendations, including driveshed modeling and site suitability analysis. Driveshed modeling is modeling the accessibility of an area by driving the road network in any direction from a point location. The GIS knowledge base is a tool that can be used by Pierce and Thurston counties on an ongoing basis to perform additional spatial analyses for projects supporting the regional meat industry.

FINDINGS

BACKGROUND

Meat processing in the United States is regulated by the Federal Meat Inspection Act (FMIA). This act applies to processing livestock including cattle, sheep, pigs, and goats. To sell cuts of meat in commercial markets, the FMIA requires that each animal be inspected by the USDA and slaughtered and processed at USDA-licensed facilities. Some additional processing, butchering, and packaging of USDA-inspected meats can occur at facilities that meet the Retail Exemption to federal regulations (See Appendix A Figure A-1). Alternatively, the USDA provides for an exemption from the FMIA regulations called the "custom meat" exemption. Producers may only sell animals prior to slaughter through the custom meat exemption. The animals can then be slaughtered and processed at WSDA-licensed facilities specifically for the owner(s) of the animal for their personal use (no resale of the meat products is allowed). See Appendix A for more information.

ENGAGEMENT PROCESS

BARRIERS IDENTIFIED DURING ENGAGEMENT PROCESS

The following barriers were identified by producers, slaughterers, and processors throughout the region during the survey, focus group, and during one-on-one phone calls.

PRODUCERS

Lack of facility availability and advanced scheduling: The limited number of slaughter and processing (S&P) facilities in Pierce and Thurston counties was frequently named as a top barrier for producers in both the surveys and in the focus groups. **The lack of S&P facilities has direct impacts to producers' herd management, production capacity, and opportunities to expand.** Additional barriers and subsequent impacts resulting from the lack of S&P facilities include:

- **Long wait times:** Producers are frequently forced to schedule slaughter dates anywhere from 12–24 months in advance due to lack of capacity at S&P facilities. This causes producers to have to forecast animal availability into the future, which limits their ability to increase herd size or expand operation due to uncertainty. This issue is further exacerbated by the varying experience levels amongst producers, with less experienced producers not having established relationships with S&P facilities and experiencing lower priority in scheduling compared to those producers with more experience.

- **Non-prime slaughter dates:** Inaccessibility to S&P facilities and available dates often forces producers to slaughter animals when they are not in their prime. This may result in added costs of feed, warmth, and shelter to keep animals beyond prime, and causes producers to extend or shorten the animal's breed cycle, resulting in lower yield. More experienced producers are more comfortable managing herds to optimize meat quality when forced to schedule non-prime slaughter dates.
- **USDA facilities and regulations:** Many producers use custom exempt facilities due to a lack of USDA-inspected facilities. State and federal laws and regulations limit where custom exempt meat can be sold compared to USDA-inspected meats, which limits their ability to expand product sales. Additionally, in previous survey findings, producers noted a lack of USDA facilities in Thurston, Snohomish, Kitsap, Grays, Mason, and Lewis counties.
- **Transport to S&P:** When asked how far producers were willing to transport animals for S&P, 30 percent of producers noted that they have on-farm slaughter while another 29 percent noted that they would be willing to travel 25–50 miles. Only five percent would be willing to travel more than 100 miles. (See Figure C-1).

This finding was also echoed in the 2019 WSU Peninsula survey sent to producers in 12 western Washington counties. When discussing USDA-inspected slaughtering facilities, **difficulty scheduling slaughtering was tied with USDA facilities not being close enough.** When discussing USDA-inspected processing facilities, scheduling was a close second to facilities not being close enough.

Cost: Rising costs of S&P services cause producers to increase their sale prices, which diminishes their competitive advantage in the market.

Infrastructure and equipment: Many producers are constrained by their available land and infrastructure, as well as equipment to manage land and haul animals. Additionally, a lack of freezer and cold storage facilities in Pierce and Thurston counties limits producers' capacity to store their product.

Experience and education gap: There is a wide range of experience and knowledge among producers. This education and experience gap often results in varying approaches to herd management, willingness to compromise with slaughter practices, and inequities in scheduling with S&P facilities.

SLAUGHTERERS

Waste management: All participants indicated waste management as a challenge for their business. Of the various concerns listed, they identified the cost of disposal options as the most important concern and the lack of on-site cold storage to hold waste before disposal as the least important.

Facility/equipment challenges: Most participants indicated facility and equipment challenges as being a barrier to increasing their slaughter capacity. Of the various concerns listed, they indicated producer site accessibility and usability for mobile slaughter operations as the most important concern, while the cooler storage capacity and kill floor square footage as the least important.

Varying capacity: While most facilities slaughter throughout the year, they experience peak periods when they have limited capacity, mainly during the late summer to late winter months. This results in varying capacity throughout the year, which results in challenges for their business, especially retention of staff during the slower times.

Fuel and travel times: High fuel costs and long travel times between customers present major barriers to long-term sustainability for businesses operating MSUs. Customer cancellations also create sunk costs when advance notice is not given.

PROCESSORS

Storage space: Lack of adequate storage space was identified as a top barrier for expanding capacity, specifically a lack of cooler and freezer space to store carcasses after slaughter.

Waste management: Waste management was not a challenge for most participants' businesses. However, one business that did indicate it was a challenge listed permitting and inspection issues, lack of rendering services, and off-site disposal options as the most important concerns. Some of these findings were echoed in the 2022 WSDA survey of meat processing facilities. Approximately one-third of respondents (32 percent or 17 of 53) rated the ability to dispose of waste material as among the most limiting factors for their production facility, with lack of rendering services (27 percent) being one of the top limitations.

Labor challenges: Most participants indicated they are experiencing labor challenges that impact their ability to increase capacity. They indicated the most important concerns they were facing were access to apprenticeship programs, wages and benefits, retention, and training new staff. The 2022 survey also noted labor challenges. Nearly all (94 percent or 48 of 51) respondents said that finding trained employees is extremely or very challenging. Three-quarters of facilities said that more than 75 percent of their new hires have no or very limited experience in

meat processing the first day on the job. Offering high enough wages or benefits to recruit new employees was cited by two-thirds (63 percent or 32 of 51) as a reason workforce development is very challenging for these facilities.

Cost: Participants identified cost as a significant barrier to expanding their businesses given the cost of equipment and cost of hiring and training employees.

Expanding capacity: In both the 2022 and 2023 surveys, processors noted capacity constraints that kept them from expanding their businesses and/or processing more animals. In the 2022 survey, processors noted that the top two factors limiting their processing capabilities were freezer or refrigeration capacity and size or floor space of the facility.

EXAMPLE BOXED MEAT PROCESSOR

Boxed meat processors have their own unique barriers and constraints given the specific training needed to process primal and large cuts. Boxed meat processors purchase large boxes of meat, weighing approximately 80-pounds, from USDA-licensed slaughterers and further cut, process, and package the meat to resell at grocery stores, restaurants, and delis. One constraint facing boxed meat processors, as reported by a local boxed meat processor during the public engagement process, is availability of qualified labor. Boxed meat processors have more capacity in terms of cold storage space and labor but do not have the adequate equipment or training to handle carcasses. One industry expert reported that training employees to properly break down portions of carcasses from larger animals can take 6 months at 8 hours per day before the staff may develop the skills necessary to prepare the cuts in the same manner the 80-lb. boxes are currently prepared. (See Appendix A).

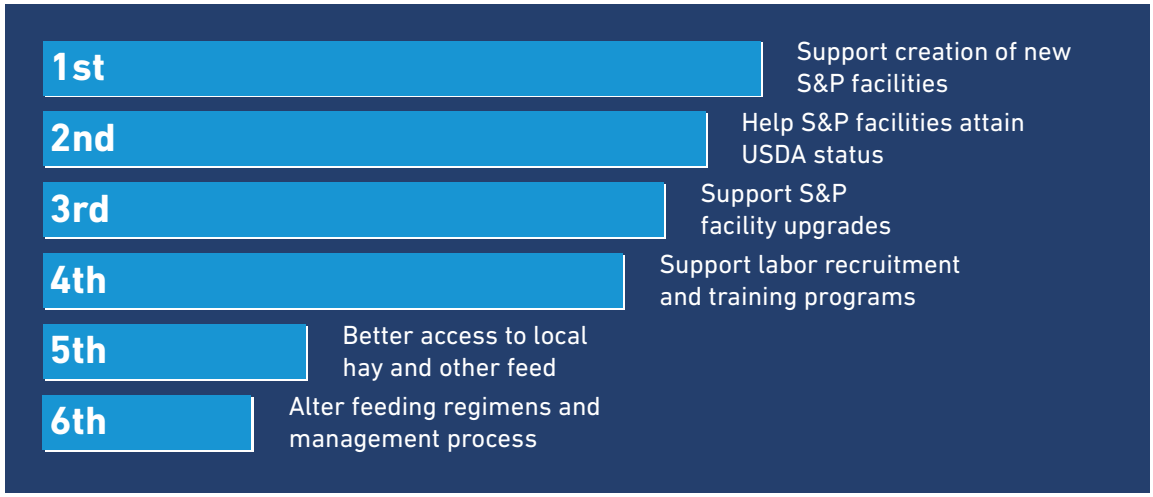
SOLUTIONS

Producers, slaughterers, and processors were encouraged to provide any creative solutions they had to address these barriers as part of the surveys and focus group.

PRODUCERS

During the producer focus group, participants were asked to rank solutions from most helpful to least helpful in reducing barriers to S&P services (see Figure 3). The top-ranked solution of supporting the creation of new S&P facilities echoed the findings in the 2022 and 2023 surveys which revealed that the highest number of producers selected lack of facility availability/advance scheduling and lack of available USDA facility as their highest barriers.

FIGURE 3: PRODUCER-RANKED SOLUTIONS FOR ADDRESSING S&P BARRIERS.



After engaging in discussion around the ranking, the following were identified as additional solutions that would be the most helpful in reducing barriers to the S&P services:

- Add new, or upgrade existing facilities to, USDA-certified facilities
- Support training, recruitment, and retention for S&P careers
- Mitigate costs and regulations of slaughter, processing, and sale of product
- Add mobile slaughter units at fixed locations

While producers noted that barriers were important to address, some farms that had been in the industry for a long time also noted the importance of maintaining a viable process for each business in the system so that all businesses could thrive. Some solutions that were shared to help maintain a viable process included:

- **S&P scheduling portal:** A portal to view and schedule times with S&P facilities may increase flexibility and create a more equitable system for producers. This system could reduce preferential treatment for some producers and potentially allow for additional slots to be added.
- **Education and outreach:** Many less experienced producers are often limited in their operations due to lack of knowledge, access to resources, and access to established relationships with processors and slaughterers. Increasing outreach to these producers or creating a mentorship program would help mitigate these barriers and empower producers to expand and grow.

- **Mobile slaughter units at fixed locations:** Having mobile slaughter units remain at the same location for an extended period (to serve as a temporary base of operations) would increase accessibility for many producers who are able to transport their animals, and this would increase efficiency and capacity for slaughterers by reducing drive time and fuel costs for mobile units.

SLAUGHTERERS

Newer slaughtering businesses are experiencing different challenges than those who are more established. This was demonstrated in the open-ended question related to funding, which asked how the businesses would spend $100,000 to increase their slaughter capacity. The more established businesses (ten to 15 years old) indicated they would spend money on equipment to help them increase capacity, while the newer business (two years old) indicated they would spend it on advertising to gain more customers. While we only had one response around potential available capacity from a newer business, it is important to note that advertising is a helpful tool for new businesses as they begin to build their customer base.

This is not an industry that is heavily dependent on online marketing tools, so alternative avenues of creating awareness of available service providers may be necessary. A scheduling portal for farms would help new or existing slaughter operations gain exposure to new customers while simultaneously help organizing slaughter dates and locations to increase operational efficiencies.

PROCESSORS

Processors proposed a few solutions as part of their one-on-one phone calls:

- **Grants and loans for processors:** Solutions that were indicated as being most impactful for addressing cost for processors included grants and loans for more land or building space for operations and hiring on-the-job trainees.
- **Funding to expand processing capacity:** When survey participants were asked how they would spend $100,000 to increase their processing capacity, most indicated they would spend it on upgrades to their equipment and facilities, especially cooler and freezer space, which would allow them to process and store more animals.

INDUSTRY UPDATE

During summer 2023, multiple projects were advancing along different timelines in the region:

- Plans continue to advance for a USDA-inspected facility in the final design of the SW WA Agricultural Business & Innovation Park in Tenino, WA. The target date for this project is in 2025.
- A new S&P facility--McFarland Ag Processing--offering USDA-inspected services to small producers, including a USDA-certified kitchen, is planning to open near Mossyrock, in Lewis County, by the end of the year.
- Puget Sound Processing and Heritage Meats, in Rochester, WA, are applying for federal grants to create two additional slaughter locations in western Washington and to expand the available value-added products for producers, respectively.

If these projects succeed, it is anticipated that much of the demand for USDA-inspected services will be met regionally. It is presently unknown if any of these facilities will provide services for farms operating through the WSDA custom meat program.

GIS ANALYSIS

PRODUCERS

Producers included in the GIS knowledge base were identified through two stakeholder engagement periods that took place in the region during 2022 and 2023 (See Figure 2). Those identified represent a small fraction of approximately 2,000 pastureland operators in the counties (USDA 2017). It is important to note that the USDA data does not distinguish between commercial farms and small family operations that are more subsistence oriented. Key information collected about producers included the type of livestock they raise, herd size, their willingness to travel for processing, and their preference for USDA- or WSDA-licensed services.

Producers are spread throughout the region primarily in rural areas. Operations may range from small-scale, backyard operations for goats and pigs to large-scale operations with nearly 1,000 cattle. Many producers run family-owned farms that have been in families for generations. Some producers raise livestock for niche markets such as organic, grass fed, and pasture raised.

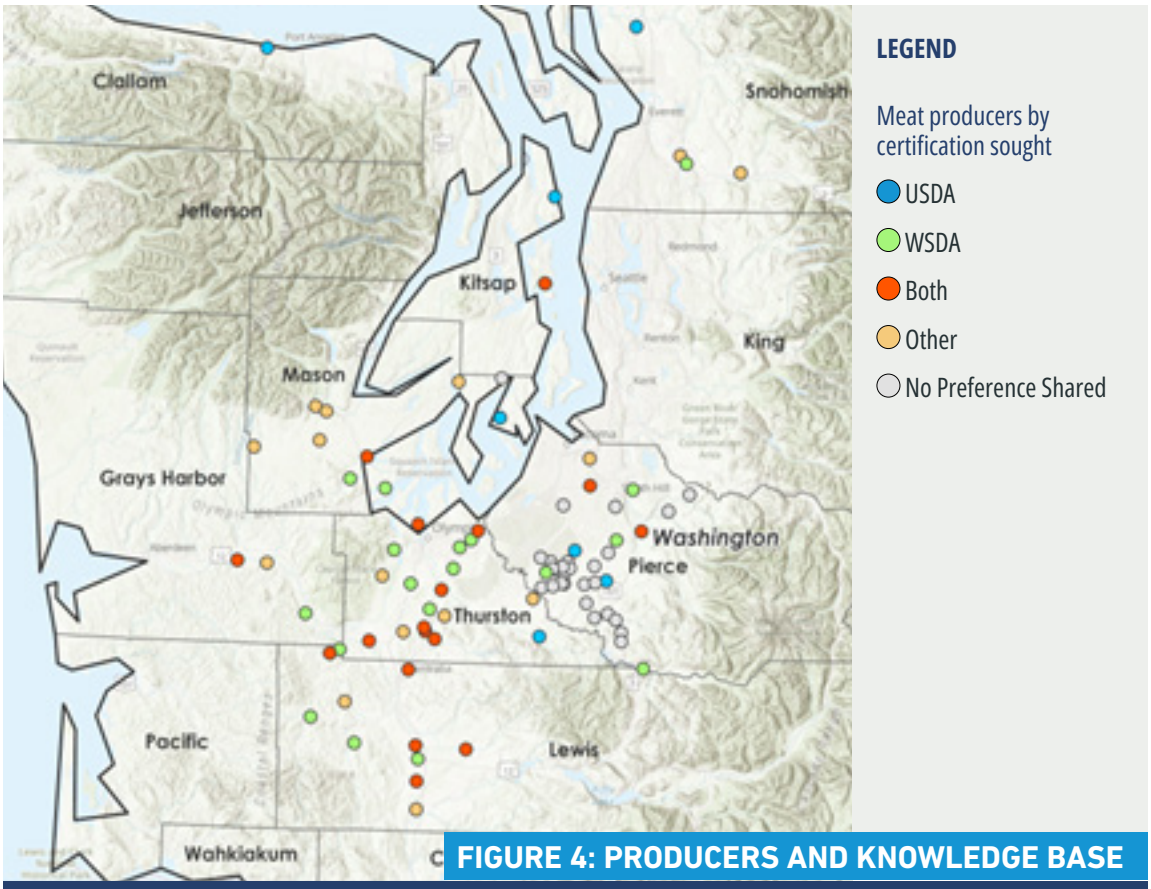


FIGURE 4: PRODUCERS AND KNOWLEDGE BASE

Producers that participated in the stakeholder engagement process and are included in the GIS Knowledge Base.

SLAUGHTERERS AND PROCESSORS

Slaughter and processing (S&P) facilities range from small-scale custom meat facilities to larger commercial processing plants. S&P facilities were identified from publicly available statewide registers published by USDA and WSDA and from information provided by the Northwest Meat Processors Association. Processors were limited to those operating in Puget Sound counties where producers in Pierce and Thurston counties are likely to travel for services. Key information about processors includes state and federal certification, types of services (e.g., slaughtering, packing), types of animals processed, and if they operate mobile slaughtering units (MSUs).

There are more than 100 slaughter and processing facilities of regional significance that were included in the GIS analysis. WSDA-licensed custom meat facilities are located throughout the region and the surrounding area. USDA-licensed S&P facilities are scarce in the region with only one regional facility serving Pierce and Thurston counties, near Rochester, WA (See Figure 5). Two commonly used USDA S&P facilities are located outside the region in Sandy, Oregon and Moses Lake, WA but they are typically only used when access to the Rochester facility is limited or unavailable. Local producers transport their livestock to these other two locations because they can accommodate more livestock at their facilities and will work to make openings for regional customers as needed. Producers seek out USDA-licensed S&P facilities if they wish to sell meat products to wholesale distributors and retail markets.

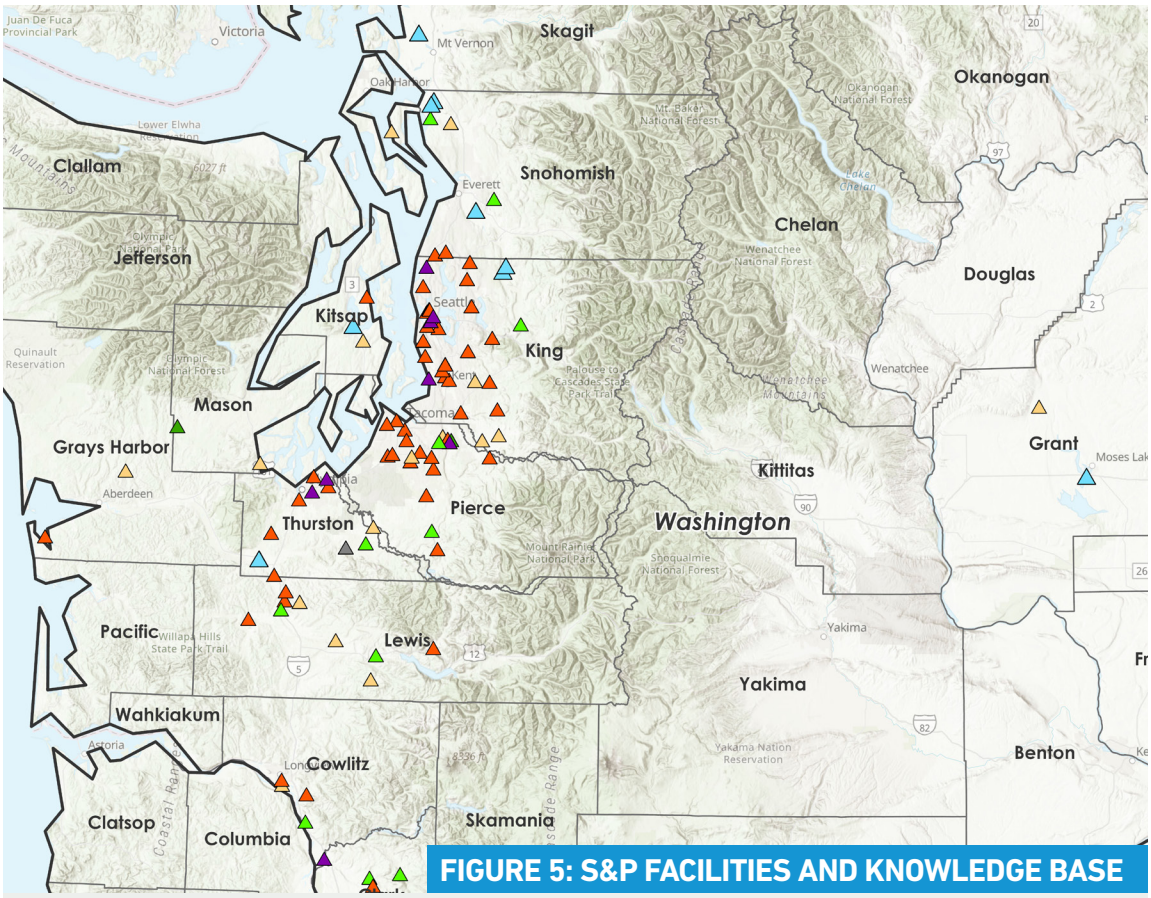


FIGURE 5: S&P FACILITIES AND KNOWLEDGE BASE

LEGEND

Meat producers by certification sought

USDA Slaughter/Processing | WSDA Farm Processor/Butcher | WSDA Slaughter | WSDA Slaughter/Processing

WSDA Processing | Boxed Imported Meats | Butcher Shop/Other | Farm Processor/Butcher

S&P facilities identified by USDA, WSDA, and Northwest Meat Processors Association that are included in the GIS Knowledge Base.

DRIVESHED ANALYSIS

Producers reported during the stakeholder engagement process that they preferred to drive less than 50 miles to S&P services. Survey results indicated that the long drives to USDA-inspected S&P are a challenge for producers. As you can see below, the highest concentration of producers within a 50-mile driveshed are in western Pierce County, and northern Thurston County.

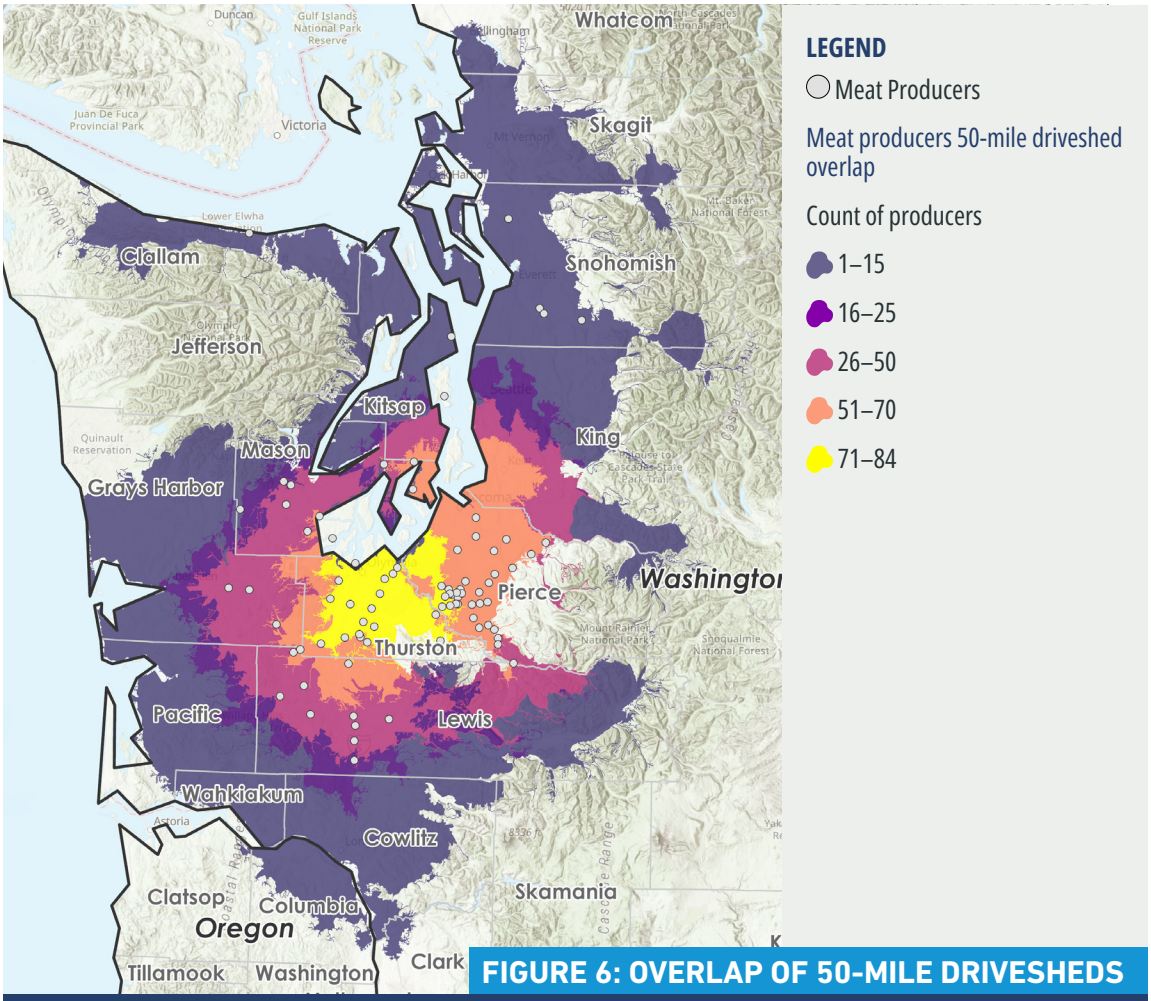


FIGURE 6: OVERLAP OF 50-MILE DRIVESHEDS

The area that is accessible by driving the road network 50 miles in any direction from a point location for all producers in the region. This highlights areas that would be accessible to the greatest number of producers and can help inform siting of additional S&P services.

NEW POTENTIAL S&P FACILITY LOCATIONS

Informed by the driveshed analysis, stakeholder feedback, and local expertise, six general locations were identified to further explore siting new S&P facilities:

- **Maytown:** This site was identified primarily due to its proximity to Interstate 5 and ability to transport animals quickly to the location and back out to the market. This location is also in a rural area with farms close by that raise livestock and is within a 50-mile driveshed of 79 producers. This is the only location near a major freeway as many producers prefer to drive on rural roads at lower speeds to ensure that higher speeds, noise, and traffic do not overstress animals prior to slaughtering and processing.
- **Tenino:** Thurston County Economic Development Council and Colvin Ranch are partnering on a plan for a small-scale USDA slaughter/processing facility to be located at the SW WA Agricultural Business & Innovation Park in Tenino by 2025. This location is accessible by a state highway and is accessible with a 50-mile driveshed by 78 producers.
- **Yelm and McKenna:** These sites are directly across from one another on the Pierce-Thurston County border and would draw producers from both counties. Both locations are accessible by rural two-lane highways. The Yelm site is accessible with a 50-mile driveshed by 79 producers, and McKenna is accessible by 76 producers. These sites are close to existing infrastructure in the city of Yelm, but the downside is that these sites are not as accessible for Lewis County farms.
- **South Creek:** This site is accessible to livestock farms in Thurston, Pierce, and south King counties, and within a 50-mile driveshed of 67 producers. The South Creek area is an agricultural area accessible via three two-lane state highways with feed stores and other farm service providers nearby. This proximity to other services could increase the convenience for producers needing S&P services.
- **South Prairie/Buckley:** This site was selected due to the proximity of the 20,000 acres of farmland on the Enumclaw plateau that is primarily used for livestock. Farms operating on the plateau did not participate in our survey, so the 50-mile driveshed of 51 producers is deceptively low for this site. The downside of this site is that traffic can bottleneck at the White River Bridge between the two counties, however it is accessible for farms in southern Pierce and eastern Thurston counties with limited traffic congestion.

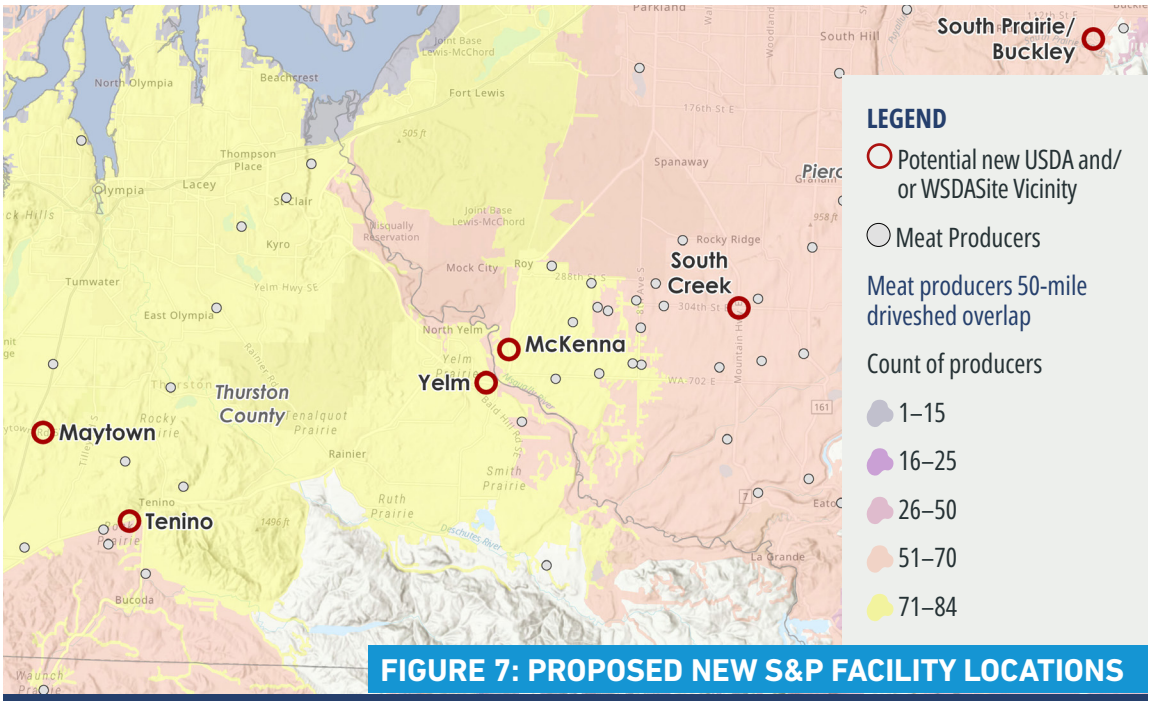


FIGURE 7: PROPOSED NEW S&P FACILITY LOCATIONS

Based on accessibility for producers.

POLICY RESEARCH

Federal and state policies govern the slaughter, processing, and sale of meat. Producers can choose to arrange for USDA-licensed S&P services or can take advantage of the custom-exempt meat program through WSDA-licensed S&P facilities, but this choice impacts the allowable end markets for the meat. While federal policies have nationwide applicability, states may choose federal exemptions and partnership programs that allow alternative options for how meat is slaughtered, processed, and sold. There is also funding made available through federal and state policies in response to barriers faced by produces nationally and in the region aimed to reduce bottlenecks in meat production. This section examines the policies that producers, S&P facilities, and retailers in the region must follow, possible variations, and available funding.

COOPERATIVE STATE INSPECTION PROGRAM

In 2021, Senate Bill (SB) 5045 proposed grant funding, education, and technical assistance to producers and processors in Washington State. A significant policy change proposed as part of SB 5045 was the establishment of a cooperative state inspection program. Under a cooperative agreement with Food Safety and Inspection Service, states may operate their own meat and poultry inspection (MPI) program if they meet and enforce requirements that are “at least equal to” those imposed under the Federal Meat Inspection Act, Poultry Products Inspection

Act, and Humane Methods of Slaughter Act of 1978. Twenty-nine states have cooperative agreements for MPI programs (See Appendix B). A cooperative state inspection program in Washington would allow meat to be slaughtered and processed at approved state S&P facilities with equivalent federal inspection levels and then sold in retail outlets throughout Washington state. This would expand marketing opportunities to producers who use WSDA-licensed S&P services; it currently limits producers to marketing their livestock through the custom meat exemption. USDA's FSIS provides up to 50 percent of the state's operating funds for MPI programs, as well as training and other assistance (USDA 2022).

Ultimately, the cooperative state inspection program was dropped from the bill due to the anticipated high cost of the program, according to an email exchange between Senator Warnick's office and MFA in May 2023. State inspectors were found by stakeholders to be just as expensive as USDA inspectors and were considered a duplication of service. The grant funding, education, and technical assistance portions of SB 5045 were incorporated into the state budget 2021 SB 5092, which passed in 2021.

COOPERATIVE INTERSTATE SHIPPING PROGRAM

Of the 29 states with cooperative state inspection programs, ten have cooperative interstate shipping (CIS) programs (See Appendix B). Under CIS, state-inspected meat can be sold in interstate commerce and can potentially be exported to foreign countries. To be eligible for the CIS program, an S&P facility must be in a state with a cooperative state inspection program, have 25 or fewer employees, have an adequate food safety system, and meet appropriate facility standards.

LOCATION-BASED MARKETING

SB 5341 passed in 2023 and creates a location-based branding and promotion program for Washington food and agriculture products. Products grown, raised, and sold in the State of Washington will get marketing assistance and branding from the state to help consumers support Washington producers and the state's agricultural economy. Washington is one of only five states in the nation without a location-based marketing program.

FUNDING

Many regions across the nation face meat processing challenges. Federal, state, and local governments are responding to the need with grant funding and assistance programs.

EXAMPLE GRANT RECIPIENT

Marzolf Meats in Snohomish, WA, received a $200,000 grant from the USDA's Meat and Poultry Inspection Readiness Grant in 2022. The grant will help Marzolf Meats increase processing capacity and upgrade their facility to offer USDA cut and wrap services and onsite USDA slaughter services. They currently operate as a WSDA-licensed custom meat facility and by upgrading their facility to meet USDA inspection, they will enable more producers to pursue retail sales opportunities. Marzolf Meats is also developing a primal cut online sales platform to buy and sell locally produced meats to restaurants, grocery stores and other butcher shops. This program will allow farmers to grow their operations knowing they have a reliable market for their product.

EXAMPLE GRANT RECIPIENT

In 2023, Island Grown Farmers Cooperative in Skagit County, WA, received approximately $815,000 in grant funds from USDA's Meat and Poultry Processing Expansion Program. They have operated a USDA-licensed MSU for 20 years and, with the grant funds, recently began work on a fixed S&P facility. Island Grown Famers Cooperative plans to expand their processing capacity and expand their cooperative membership to include other producers. Completing the upgrades will help more producers access USDA-licensed S&P services and enable more producers to reach consumers through farmer markets, food co-ops, restaurants, and direct sales.

FEDERAL

As part of the American Rescue Plan Act investment, $1 billion in funds were dedicated to expansion of independent meat and poultry processing capacity. USDA issued a request for information in July 2021 to ask stakeholders how to best allocate the funds to increase processing capacity. Based on the stakeholder responses, this funding will be delivered through a variety of USDA programs. Some programs are already underway, and others will be developed soon according to the USDA's webpage on meat and poultry supply chain funding opportunities (USDA 2023).

FEDERAL GRANTS

Most recently, USDA announced in April 2023 the availability of up to $125 million through two new grant programs that will create more options for meat and poultry farmers by investing in processing projects. The grants are (1) the Indigenous Animals Harvesting and Meat Processing Grant Program, and (2) the Local Meat Capacity Grant. Both applications were due on July 19, 2023.

The next funds planned to open through USDA are $100 million in grants to meat and poultry processors for new and existing facilities and $20 million in research and development to help create new or expand existing processing capacity. The grant funds will be announced on USDA's website when available (www.usda.gov/meat).

In 2023, Island Grown Farmers Cooperative in Skagit County, WA received approximately $815,000 in grant funds from USDA's Meat and Poultry Processing Expansion Program. They have operated a USDA-licensed MSU for 20 years and, with the grant funds, recently began work on a fixed S&P facility. Island Grown Famers Cooperative plans to expand their processing capacity and expand their cooperative membership to include other producers. Completing the upgrades will help more producers access USDA-licensed S&P services and enable more producers to reach consumers through farmer markets, food co-ops, restaurants, and direct sales.

STATE BUDGET

New funding was authorized in the 2023–2025 biennium through SB 5187 (2023) for grants, technical assistance, and outreach for processors and producers in Washington State. Similar to SB 5092 in the 2021–2023 biennium, SB 5187 supports meat and poultry production and processing. During the 2021-2023 biennium, it was permissible for state agencies to distribute funds from federal sources directly to Washington businesses through grant programs to aid in pandemic recovery. The funds in the 2023-2025 biennium will not be made available directly to businesses. The budget includes the following support for meat production and processing:

- **$400,000** of the Department of Labor and Industries workforce education investments for grants supporting registered apprenticeship programs for meatcutters.
- **$1 million** of the WSDA's coronavirus state fiscal recovery funding for technical assistance to producers and processors for meat and poultry processing.

STATE GRANTS

In March 2022, WSDA awarded $3.6 million through its Local Meat Processing Capacity Grant program, seeking to expand the number of small and intermediate sized meat processors. These funds were made possible by one-time funding from the state Legislature. According to the WSDA, the purpose of this grant was to increase access to local meat and poultry products for consumers in Washington State by increasing producer's access to livestock S&P services, especially, but not limited to, USDA-inspected services. Proposals to expand capacity included purchasing repair equipment, upgrading slaughter and processing equipment, and conducting facility planning and staff training. Small projects funded by this grant were due to be completed by June 30, 2022, and large projects were due to be completed by June 30, 2023.

More than 100 eligible applications were submitted by aspiring new processors and by established processors to upgrade existing equipment to add new capacity. Applicants across the state requested $27 million of funding, and applicants reported that if there were no funding or timeline limitations, they would request an additional $44 million to expand facilities and create new capacity. The WSDA estimates that the small projects completed by the end of June 2022 enabled an estimated additional $3.5 million annually in gross revenue for meat processing shops and additional $16 million annually in gross revenue for farms and ranches. Small project grants averaged $50,000 per award, but altogether they have yielded nearly $20 million annually for Washington businesses.

In September 2022, WSDA awarded 138 grants totaling nearly $16.5 million through its Local Food System Infrastructure Grant program to improve capacity along the local food supply chain and increase opportunities for Washington farms to sell products in local markets. Broadly, the grant funded projects for marketplaces, food processors, and businesses in the meat, dairy, produce, and grain industries.

EXAMPLE GRANT RECIPIENT

The WSDA grants have potential to make a big impact for regional processors. For example, one WSDA-licensed processor received $75,000 from the Local Meat Processing Capacity Grant program and $75,000 from the WSDA Local Food System Infrastructure Grant program. These funds helped the business double its cutting floor space, increase holding areas for animals scheduled for slaughter by available mobile slaughter services on site, and more than double its cold storage space. The expansion in this facility has more than doubled the business' total operating capacity and improved slaughter efficiency for mobile slaughter businesses that partner with the processor. The expanded facilities will allow the business to offer slaughter and processing services full-time, year-round. The grant funds addressed their primary constraint: a lack of storage space that led them to turn customers away.

RECOMMENDATIONS

The following recommendations are informed by stakeholder feedback, policy research, GIS analysis, and review of solutions in other regions. It is important to note that the goal of this study was to provide actionable recommendations, but additional resources, funding, and partnership development would be needed to implement the recommendations and actions noted below.

- **New S&P facilities:** Invest in additional S&P facilities, for fixed facilities and mobile slaughtering units (MSUs), to help make S&P services more accessible and help increase opportunities for producers to sell their meat products. Informed by the driveshed analysis, stakeholder feedback, and local expertise, six general locations were identified to further explore siting new S&P services.
  - » **County Actions:** Share recommended general locations with industry partners, pursue a feasibility study, and identify possible funding opportunities
- **S&P scheduling portal:** Create a scheduling portal serving producers, S&P operations, and consumers regionwide. The portal would allow users to view and schedule times with S&P services and could help producers find services more easily that fit their schedules and match their preferred driving distance. Processors can benefit by more easily filling cancelled appointments, reducing lost time, and wasted resources. It would also enable processors to schedule pickup and delivery times with consumers, which could help alleviate storage capacity limitations and ultimately allow them to process more meat products year-round.
  - » **County Actions:** Identify private industry partners to develop S&P scheduling portal on behalf of the region, help identify and apply for grant funding, and assist with outreach to introduce local producers and S&P facilities to the scheduling portal.

- **Central service hub:** Create a central service hub or hubs with a fixed S&P facility or the infrastructure to regularly accommodate MSUs to reduce the distance producers need to transport their livestock to both USDA-licensed and WSDA-licensed S&P services. Hubs should be designed with the fixed infrastructure needed by MSUs that can be challenging to provide on each individual farm. The hub could also include a lending library of trailers for transporting animals to slaughter and provide controlled access to cold storage and other equipment that is especially needed in busy seasons and by newer businesses. Figure 6 displays ideal locations for central service hubs to serve the greatest number of regional producers.
  - » **County Actions:** Identify industry partners or collaborators to run a lending library, identify possible funding opportunities, and support local producers by helping secure grant funding to expand infrastructure like holding pens and concrete slabs for MSUs.

- **State policy:** Advocate for state legislation that creates cooperative programs like an MPI program and CIS program. An MPI program can allow for S&P facilities with federally equivalent inspection processes to prepare meat for retail sales throughout Washington State. A CIS program enables state-inspected meat to be sold in interstate commerce and exported to other countries.
  - » **County Actions:** Gauge interest of regional stakeholders in pursuing policy changes in future legislative sessions. If regional support exists, collaborate with industry experts and elected officials to identify financial barriers that prevented the MPI program described in SB 5045 from passing in 2021 and consider potential solutions. Contact states with an MPI program, like Oregon, or both MPI and CIS programs like Montana, to explore the benefits and drawbacks of their cooperative programs.

- **Increase capacity through state grants:** Support producers and processors in applying for, matching, and managing state grant funds for equipment upgrades and increased storage space.
  - » **County Actions:** Advocate for additional funding if there is stakeholder support.

- **Increase infrastructure through federal grants:** Support processors in acquiring federal funding to upgrade from WSDA- to USDA-licensed S&P facilities or build new USDA-licensed S&P facilities. Support brick and mortar S&Ps, MSUs, and fixed location MSUs including the associated infrastructure needed to enable on-farm slaughter. Support processors with grant applications, identifying matching funding sources, and managing federal grant funds.
  - » **County Actions:** Support bills and advocate for additional funding if there is stakeholder support.
- **Mentorship program:** Establish a mentorship program to help onboard new producers, share necessary information for successfully entering the meat production industry, and help establish business relationships with S&P service providers and consumers.
  - » **County Actions:** Identify funding and interested partners, like the NW Meat Processors Association, technical schools, local conservation districts, WSU-Extension offices, and outreach organizations to develop new programs and/or expand existing programs.
- **Apprenticeship program:** Establish an apprenticeship program to recruit and train new S&P workers for career positions.
  - » **County Actions:** Identify funding and interested partners, like the NW Meat Processors Association, the Niche Meat Processors Assistance Network, technical schools, and outreach organizations to develop new programs and/or expand existing programs.
- **Marketing and Purchasing of Custom-Exempt Meat:** Expand demand for WSDA-licensed custom-exempt meat through advertising and decreasing barriers to purchasing large quantities of meat. Bolster custom meat sales through increased advertising and provide educational materials for consumers on how to buy directly from farmers and prepare unfamiliar cuts of meat (WSDA 2023). Explore rebate programs for freezers with proof of purchase of custom-exempt meat from a local producer. Consider incentive programs processing facilities can use to encourage prompt offtake of meat by customers. Consider offering refrigeration space as part of an S&P central service hub or partner with apartments, storage facilities, or food-based community programs to provide shared refrigeration lockers.
  - » **County Actions:** Partner with WSDA to produce outreach and marketing materials to encourage consumers to purchase custom-exempt meat directly from farmers. Further study barriers to purchasing custom-exempt meat like

consumers' understanding of the purchasing process and limited refrigeration space.

- **Buffalo and Beefalo:** Meat products from buffalo and beefalo can be sold in commercial markets within Washington State when slaughtered and processed at a WSDA-licensed facility. Producers may use USDA-licensed facilities for their buffalo and beefalo, but it is not required. If there are bottlenecks in USDA-licensed facilities, buffalo and beefalo can still be sold in Washington grocery stores and restaurants if slaughtered at a WSDA-licensed facility so consumers can still purchase meat through a familiar shopping experience. Expand consumer demand for exotic animals, like buffalo and beefalo (a 3/8 bison and 5/8 domestic cattle crossbreed), through advertising and support producers through grant and technical assistance to begin raising buffalo and beefalo.
  - » **County Actions:** Guage interest in raising buffalo and beefalo and help increase consumer demand through marketing. Determine if regional S&P operations are equipped and trained to handle these species.

NEXT STEPS

Pierce and Thurston counties will make this report available to all producers, processors, slaughterers, and partners who engaged in this study. The project team presented findings to the Pierce County Council and Thurston Board of County Commissioners in July 2023 prior to submitting the final report to these bodies. Pierce and Thurston counties will take the following next steps through the end of 2023 to begin refining and prioritizing recommendations:

- Distribute copies of the final report across the study area to local, state, and federal partners, and food system partners.
- Conduct a briefing with the Pierce County Agriculture Advisory Commission and any other official bodies in the sponsoring counties.
- Consult with interested stakeholders to clarify study findings and recommendations as requested.

It is important to note that additional resources, funding, and partnership development would be needed to develop a work program to implement the recommendations noted above and prioritize a preferred slaughtering and processing site for Pierce and Thurston County collective support.

LIMITATIONS

This report is based on current conditions in the central and south Puget Sound region. These conditions will continue to evolve after this report is delivered.

The services undertaken in completing this report were performed consistently with generally accepted professional consulting principles and practices. No other warranty, express or implied, is made. These services were performed consistent with our agreement with our client. This report is solely for the use and information of our client unless otherwise noted. Any reliance on this report by a third party is at such party's sole risk.

Opinions and recommendations contained in this report apply to conditions existing when services were performed and are intended only for the client, purposes, locations, time frames, and project parameters indicated. We are not responsible for the impacts of any changes in environmental standards, practices, or regulations subsequent to performance of services. We do not warrant the accuracy of information supplied by others, or the use of segregated portions of this report.

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APPENDIX A

Industry Landscape

INDUSTRY LANDSCAPE

This section summarizes the businesses and policies that shape the meat production and processing industry in the central and south Puget Sound region (the region) (See Figure 1, in the report).

PRODUCTION

Meat production begins on farms and ranches, where livestock are raised. Producers are responsible for ensuring the health and well-being of their livestock and adhering to various regulations and best practices related to animal welfare, nutrition, and environmental stewardship. When the animals reach the desired market weight, producers arrange for services with licensed slaughter and processing facilities. Producers may choose to transport their livestock to S&P services at brick and mortar or fixed MSU locations or arrange for service through a mobile slaughtering unit (MSU) that will come to the producer's property.

INSPECTION AND FOOD SAFETY

Meat processing in the United States is regulated by Food Safety and Inspection Service, under authority granted in the Federal Meat Inspection Act (FMIA). This act applies to processing livestock including cattle, sheep, swine, and goats. Slaughter and processing facilities may be licensed by the Washington State Department of Agriculture (WSDA) or inspected by the United States Department of Agriculture (USDA). The inspection/licensing level used for the slaughter and processing of livestock determines where the meat can be marketed and who may consume it.

USDA

All meat sold through retail outlets must be inspected by the USDA. After slaughter at a USDA-licensed facility, processing, butchering, and packaging can occur at facilities that meet the Retail Exemption to federal regulations (See Figure A-1). At USDA-inspected slaughter facilities, each animal is inspected before and after slaughter by an employee of the USDA's FSIS. USDA-inspected meat may be individually packaged and sold to individuals, restaurants, stores, and at farmers markets (as shown in Figure A-1). USDA-inspected meat may be shipped outside of Washington State.

The USDA plays a crucial role in ensuring the safety of the nation's meat products. The FSIS is an agency within the USDA that is responsible for implementing and enforcing regulations under the FMIA. The FMIA sets rigorous standards for the inspection, labeling, and packaging of meat products to protect public health and help ensure the safety of meat products available for purchase.

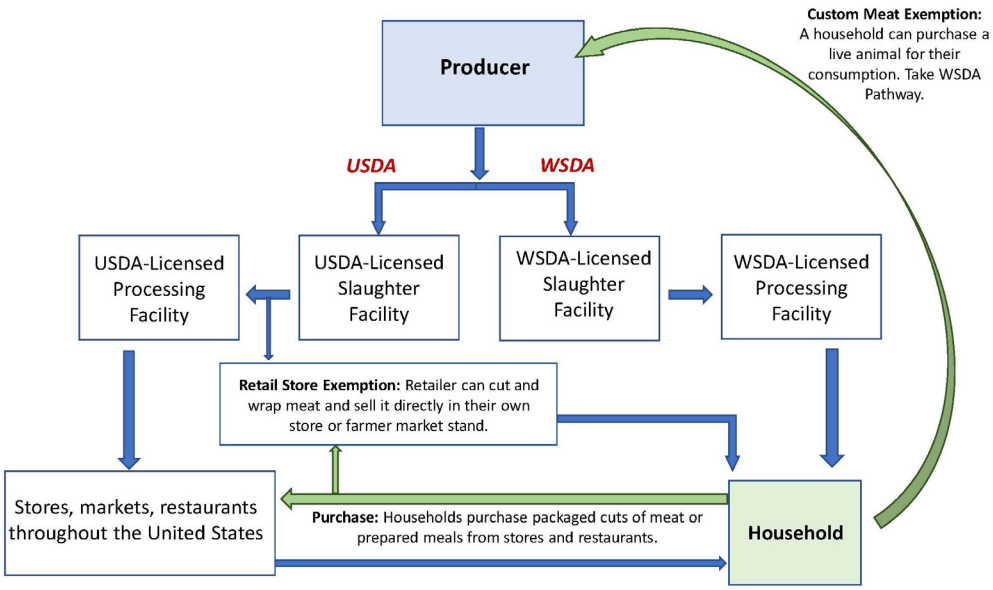
WSDA

The FMIA includes several exemptions from inspection, including the "custom meat" exemption. Meat processed under this exemption is exempt from inspection, but subject to several conditions, which gives producers the option of arranging for slaughter and processing of livestock at a facility licensed by the WSDA (See Figure A-1). The meat from animals processed through the WSDA food safety program is called "custom meat" or "uninspected meat" because it was not inspected (WSDA 2010). Only live animals can be sold through this exemption. Animals can be sold as whole, halves, quarters, eighths, or smaller portions if paperwork clearly documents that the animal is fully owned by multiple customers before slaughter (WSDA 2019). Custom meat is for the sole use of the owner in their household, for their immediate family, and non-paying guests. All sales, slaughter, cut, and wrap must occur in Washington State. Transfer of ownership of any portion of the animal after slaughter is illegal.

PRODUCTION TO HOUSEHOLD

There are several pathways meat can take to complete the journey from producer to household (Figure A-1). This graphic illustrates the limited marketing opportunity for WSDA custom meats compared to the greater marketing opportunities for USDA-inspected products.

FIGURE A-1: MEAT INDUSTRY PATHWAYS FROM PRODUCTION TO HOUSEHOLD IN WASHINGTON STATE.



KEY

- The pathways producers can choose for processing and marketing their livestock
- Purchase a household may make

USDA VS. WSDA

Producers who wish to market their livestock to retail establishments are limited to arranging for slaughter and processing (S&P) services at USDA-inspected facilities. Accessing USDA-inspected facilities is challenging for many small producers because there are few available and require long drive times (See Figure 7, in the report). WSDA-licensed custom meat facilities are more accessible throughout the state, but the marketing potential for these facilities is very limited because they cannot sell packaged cuts of meat. Only live animals that are slaughtered and processed for the sole use of the owner of the animal and the owner's household can use these services.

PRODUCERS

According to the USDA National Agriculture Census, there are 802 pastureland operations in Thurston County and 1,170 pastureland operations in Pierce County. Not all pastureland operations are currently raising livestock as a meat production business. Of these pastureland operations, 61 participated in the stakeholder surveys as a producer. It is likely that there are several hundred active producers in the region, somewhere in between the number of respondents to the survey and the total included in the census.

Producers are spread throughout the region primarily in rural areas (See Figure 4 in the report). Operations may range from small-scale, backyard operations for goats and pigs to large-scale operations with nearly 1,000 cattle. Many producers run family-owned farms that have been in families for generations. Some producers raise livestock for niche markets such as organic, grass-fed, and pasture raised.

TYPES OF HERDS

Of the 106 producers and landowners surveyed in the 2022 Pierce County survey and 2023 regional survey of producers conducted as part of this market study, producers most often mentioned maintaining and slaughtering herds or flocks of cows, pigs, chickens, lamb, and goats, as well as a few additional types of animals (buffalo, turkeys, rabbits, deer, and ducks).

Producers raise and slaughter cattle at a far greater rate than any other livestock. Fifty-eight producers reported herd sizes ranging from fewer than ten head up to one hundred. Eight producers reported herd sizes from 101–500, with one reporting herd sizes larger than 500 (at over 1,000). Twenty-eight respondents reported raising pigs, 32 raise lambs, 34 raise chickens, and 12 producers responded that they raise goats for slaughter.

Among respondents, Pierce County has the greatest number of cattle operations (33) with the largest reported numbers of cows (more than 1,000). Pierce County and Thurston County cattle herds averaged about 92 animals. The number of pigs at any one producer ranged from fewer than ten to 80, with the larger producers located in Kitsap and Snohomish County. The number of producers raising lamb is more evenly distributed among respondents, with producers in Kitsap, Mason, Snohomish, Lewis, Pierce, and Thurston counties reporting flock sizes of up to 60 in Kitsap, ten to 25 in Mason, 150 for one large producer in Snohomish, up to 125 in Lewis, up to 140 in Pierce, and 20 to 60 in Thurston counties. Goat herd sizes were smaller and reported by fewer respondents.

SLAUGHTERERS AND PROCESSORS

S&P facilities range from small-scale custom meat facilities to larger commercial processing plants. S&P facilities slaughter livestock and processing includes services like butchering, cutting, wrapping, and labeling.

Small-scale custom meat facilities are often licensed by the WSDA, and they primarily cater to individuals who raise livestock to be sold through the custom meat exemption. A small-scale facility can slaughter about six to ten cows per day. Larger commercial processing plants handle higher volumes of livestock and are often inspected by the USDA, which allows them to prepare meat products for wholesale distributors, retail markets, and interstate sales. Large processing plants can slaughter about 400 cattle an hour, although there are few facilities of this size in western Washington.

There are over 100 slaughter and processing facilities of regional significance that were included in the GIS knowledge base. WSDA-licensed custom meat facilities are located throughout the region and the surrounding area. USDA-inspected S&P facilities are scarce in the region (See Figure 5 in the report). Two commonly used USDA S&P facilities are located outside the region in Sandy, Oregon and Moses Lake, WA but they are typically only used when access to the Rochester facility is limited or unavailable. Local producers transport their livestock to these other two locations because they can accommodate more livestock at their facilities and will work to make openings for regional customers as needed. Producers seek out USDA-inspected S&P facilities if they wish to sell meat products to wholesale distributors and retail markets.

Large USDA-inspected slaughterhouses/processors (i.e., Walt's Wholesale Meats in Woodland, Schenk Packing Company in Stanwood) extract value from all the parts of the cow: hide, bones, organs, etc. Smaller processors and their smaller farm customers are only capturing value of about 300-400 lbs. of meat from each cow. The large operations are monetizing an additional 600-700 lbs. of materials from that same cow, and they generate enough of these lower-value by-products at scale to offset many operating costs. Small processors cannot provide enough volume to buyers of those by-products, and therefore they do not have the same operating margins as larger S&P facilities.

In July 2023, reports surfaced on plans for additional planned S&P facilities in the region. In addition to the plans under development for the creation of a new USDA-inspected facility at the SW WA Agricultural Business & Innovation Park in Tenino, WA, two other operations are planning new facilities or seeking funding to expand their current services across the region.

- McFarland Ag Processors is reportedly planning to open a new, small-scale USDA-licensed S&P facility near Mossyrock, WA, in Lewis County in September 2023. McFarland plans to serve smaller producers and will also provide access to a USDA-certified kitchen for local livestock and crop producers to have additional value-add opportunities.
- Puget Sound Processing and Heritage Meats, both currently based outside Rochester, WA, are seeking grant funding to create two additional USDA-inspected slaughtering locations in western WA and to offer more value-added processing services under USDA inspection, respectively.

MSUs

MSUs are self-contained facilities that are designed to provide on-site slaughtering and processing of animals. They are typically built on a large trailer or as a modified box truck and can be licensed/inspected by either WSDA or USDA. They commonly contain features such as a stunning and slaughtering area, space to clean and split carcasses, and containers to collect waste for disposal. After preparing the carcasses, most mobile units include refrigerated storage and can deliver the carcasses to a cut and wrap facility.

The host site needs to provide infrastructure for the MSU. Depending on local regulations, host sites may need to include an animal inspection area, condemned animal area, water connection, stunning chute, and bleed-out pad. Some counties require all wash water to be collected in holding tanks for off-site disposal.

One benefit of an MSU is that producers do not need to transport their animals long distances to slaughter, which is stressful for the livestock and time-consuming for the producer. It also can help bring USDA services closer to producers. The disadvantages are that MSUs still require infrastructure at the producer's site that may be difficult to provide. Additionally, service fees are usually higher for MSU services than brick and mortar S&P sites.

BOXED MEATS

Boxed meat processors purchase large boxes of meat, weighing approximately 80-pounds, from USDA-licensed slaughters. Meat is purchased from the USDA-licensed slaughters is from producers both inside and outside the region as well as imported from out-of-state. Some regional boxed meat processors purchase boxes from USDA-licensed facilities over 150 miles away. Boxed meat processors do not have the ability to break down full carcasses and instead purchase boxes of primal and other large cuts of meat. Boxed meat processors further cut, process,

and package the meat and then resell the smaller packages to grocery stores, restaurants, and delis. Additional processing may include value-added services like marinating, dry aging, and special cuts. The smaller cuts and packages are ready to be placed in retail cases without needing further processing or ready to be used in specific recipes at restaurants.

A constraint facing boxed meat processors, as reported by a local boxed meat processor during the public engagement process, is availability of qualified labor. Boxed meat processors have more capacity in terms of cold storage space and labor but do not have the adequate equipment or training to handle carcasses. One industry expert reported that training employees to properly break down portions of carcasses from larger animals can take 6 months at 8 hours per day before the staff may develop the skills necessary to prepare the cuts in the same manner the 80-lb. boxes are currently prepared.

One regional boxed meat producer reported the biggest challenges facing them are:

01| lack of exposure for services they can provide,

02| lack of marketing services that can connect regional producers to the final customer and consumer,

03| strategies for selling whole animals and taking carcasses from local farms,

04| needing more packaging equipment and options.

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APPENDIX B

STATE POLICY AND OTHER REGIONS

STATE POLICIES AND OTHER REGIONS

Obtaining slaughter and processing (S&P) services is a challenge for many producers nationwide due to labor shortages, long drive times, and other factors. Some states have responded by changing policies to alleviate bottlenecks in the food supply chain, boost their local economy, and help consumers purchase local meat.

COOPERATIVE AGREEMENTS FOR STATE INSPECTION PROGRAMS

States may enter into cooperative agreement with the United States Department of Agriculture (USDA) to operate state meat and poultry inspection (MPI) programs (USDA, 2023). Twenty-nine states have created or retained MPI programs that meet federal standards which allows them to provide more options for slaughter and processing services for retail-bound meat. Cooperative inspection programs allow for state-level inspections that enable the intrastate retail sale of meat. Under a cooperative agreement with USDA, states may operate their own MPI program if they meet and enforce requirements that are "at least equal to" those imposed under the Federal Meat Inspection Act, Poultry Products Inspection Act, Wholesome Meat Act, and Humane Methods of Slaughter Act of 1978. USDA's Food Safety Inspection Service provides up to 50 percent of the state's operating funds for MPI programs, as well as training and other assistance (USDA, 2022). Meat slaughtered and processed at WSDA-licensed facilities is limited to intrastate commerce only.

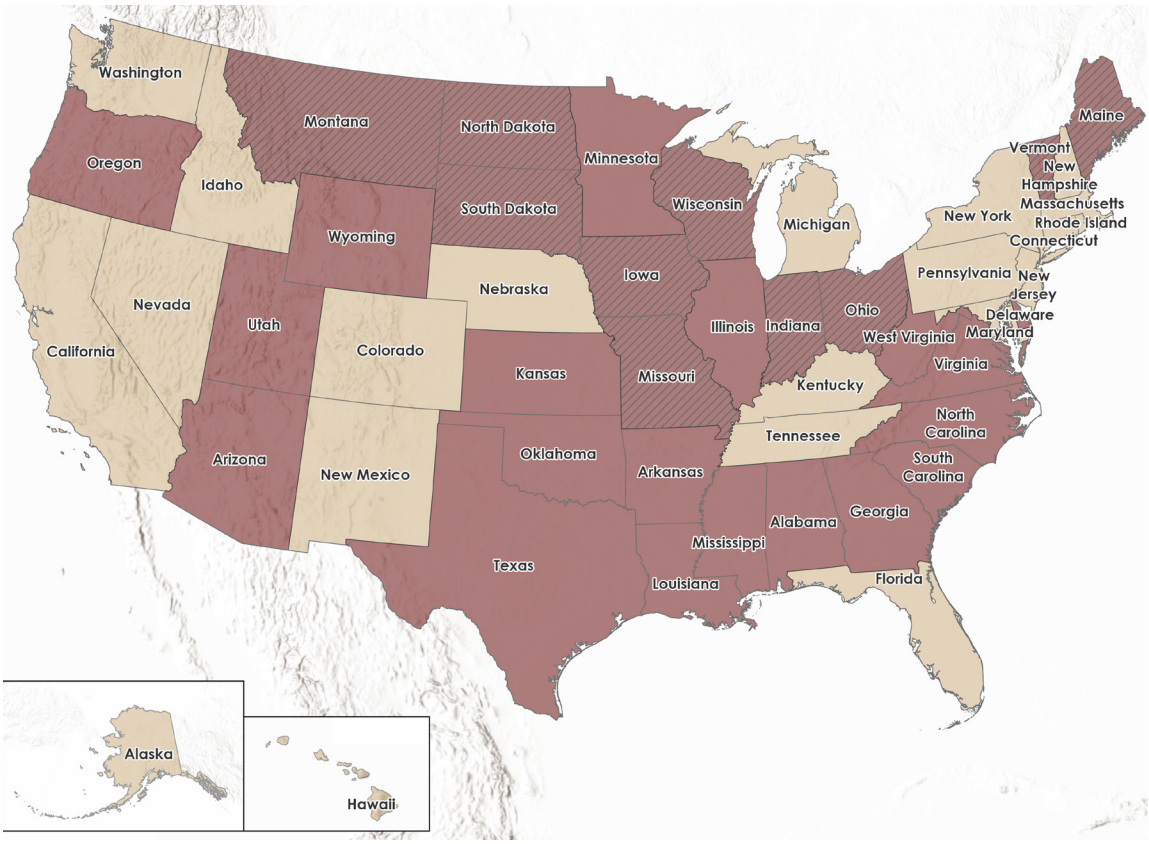
Washington State attempted to begin a similar program in 2021 through Senate Bill 5045. Ultimately, the cooperative state inspection program was dropped from the bill due to the anticipated high cost of the program, according to an email exchange between Senator Warnick's office and Maul Foster & Alongi, Inc., in May 2023. State inspectors were found by stakeholders to be just as expensive as USDA inspectors and considered a duplication of service. Additionally, the cost to upgrade S&P facilities to have federally equivalent processes was seen as prohibitively expensive by regional S&P facility owners.

States with their own MPI Programs: Alabama, Arizona, Arkansas (meat inspection only, not poultry), Delaware, Georgia (meat inspection only), Illinois, Indiana, Iowa, Kansas, Louisiana, Maine, Minnesota, Mississippi, Missouri, Montana, North Carolina, North Dakota, Ohio, Oklahoma, Oregon (meat inspection only, not poultry), South Carolina, South Dakota (meat inspection only), Texas, Utah, Vermont, Virginia, West Virginia, Wisconsin, Wyoming.

States without their own MPI Programs: Alaska, California, Colorado, Connecticut, Florida, Hawaii, Idaho, Kentucky, Maryland, Massachusetts, Michigan, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, New York, Pennsylvania, Rhode Island, Tennessee, Washington.

COOPERATIVE INTERSTATE SHIPPING PROGRAM

Of the 29 states with MPI programs, ten have cooperative interstate shipping (CIS) programs. The states with CIS programs are Indiana, Iowa, Maine, Missouri, Montana, North Dakota, Ohio, South Dakota, Vermont, Wisconsin. Under CIS, state-inspected meat can be sold in interstate commerce and can potentially be exported to foreign countries. To be eligible for the CIS program, an S&P facility must be in a state with an MPI program, have 25 or fewer employees, have an adequate food safety system, and meet appropriate facility standards.



OREGON

In 2022, Oregon became the most recent state to adopt an MPI program. Previously, Oregon had 13 USDA S&P facilities, and many producers still needed to drive three or more hours to obtain S&P services (Foden-Vencil 2023). A shortage of USDA meat inspection services during the pandemic exacerbated the difficulties producers faced obtaining S&P services and prevented producers from selling their meat products in retail markets. The Oregon Department of Agriculture (ODA) responded by arranging for an MPI program through a cooperative agreement with the USDA (KTVZ 2022). As of February 2023, ODA was working with 15 Oregon businesses to adopt the new inspection program and train new inspection staff. As a result of allowing smaller, local S&P businesses to operate under the MPI program, the ODA aims to reduce food supply bottlenecks and increase the amount of locally raised meat products in Oregon's stores and restaurants (Foden-Vencil 2023).

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APPENDIX C

ENGAGEMENT SUMMARY

ENGAGEMENT SUMMARY

OVERVIEW

As part of Pierce and Thurston counties' assessment of meat production and processing capacity in the central and south Puget Sound region (the region), Pierce and Thurston counties wanted to hear directly from producers, processors, and slaughter facilities. Pierce and Thurston counties were most interested in hearing about the barriers these groups faced when processing animals at regional slaughter and meat processing facilities. The counties also wanted to learn about any creative solutions the groups had for these barriers.

The engagement process built on past engagement by the Washington State Department of Agriculture (WSDA) through their 2022 producer survey, Pierce County through their 2022 producer and landowner survey, and Washington State University (WSU) through their 2019 Peninsula Survey. For this process, Pierce and Thurston counties began with a survey of producers that launched in mid-March 2023. The 2023 survey received 67 responses. Following the completion of the survey, producers were invited to attend a virtual 90-minute focus group on either the evening of April 13 or April 18, 2023. The focus group discussions centered on the barriers producers faced in slaughtering and processing animals and pathways to potential solutions. A total of 13 participants representing 11 farms participated.

A survey of processors and slaughterers followed in late March 2023. Given the time constraints for this group, Pierce County primarily gathered data through follow-up one-on-one phone calls to both fill out the survey and ask follow-up questions to gather all information needed. Six slaughterers participated, two processors participated, and six slaughters/processors participated.

This appendix summarizes the current engagement process and Pierce County's 2022 engagement of producers, and it ends with a summary of past engagement processes by WSU and WSDA.

PRODUCER FEEDBACK

SURVEYS

In 2022, Pierce County distributed a survey to producers and landowners in Pierce County and received 42 survey responses. In 2023, Pierce and Thurston counties expanded their engagement to distribute an online survey to livestock producers in the region and received an additional 67 responses.

The 2022 and 2023 survey questions were not identical as can be seen in the respective survey data in Appendix F and Appendix I. To manage survey fatigue, Pierce County did not ask producers who filled out the survey in 2022 to fill out the survey in 2023. Three producers filled out both 2022 and 2023 surveys.

This section summarizes key takeaways and overarching themes from the 2022 and 2023 surveys.

Target Dates for Animal Slaughter and Processing

Producers were asked to list the factors that contributed to their decision to slaughter animals when they did. Table C-1 provides the reasons given grouped by county and estimated size of county production of red meat based on qualitative responses given for average herd size. The top reasons for the decision to slaughter an animal included demand, the availability of food or pasture for the animal, and animal life cycle.

TABLE C-1: REASONS GIVEN FOR SLAUGHTER DATE BY COUNTY AND FREQUENCY

REASON FOR SLAUGHTER DATE	NUMBER RESPONDING
PIERCE COUNTY	
Animal life cycle (including breeding cycles)	7
Availability of food/pasture for animal	3
Demand (farmer's market, CSA, customer preference, meal traditions)	2
Quality of product (including age and size)	2
Temperature/weather—avoid heat, cold, flood	1
Availability/scheduling of processing	1
Convenience/fit/coordination with other farm, fair, or family considerations	1
Income need of producer	1
Provide steady supply	1
THURSTON COUNTY	
Demand (farmer's market, CSA, customer preference, meal traditions)	8
Availability of food/pasture for animal	5
Animal life cycle (including breeding cycles)	4
Convenience/fit/coordination with other farm, fair, or family considerations	4
Availability/scheduling of processing	3
Type of meat influences dates	3
Temperature/weather—avoid heat, cold, flood	2
Avoid cost of shelter	1
Provide steady supply	1
SNOHOMISH COUNTY	
Animal life cycle (including breeding cycles)	3
Convenience/fit/coordination with other farm, fair, or family considerations	2
Availability of food/pasture for animal	1
Temperature/weather—avoid heat, cold, flood	1
Demand (farmer's market, CSA, customer preference, meal traditions)	1
KITSAP COUNTY	
Availability of food/pasture for animal	2
Temperature/weather—avoid heat, cold, flood	2
Availability/scheduling of processing	2
Animal life cycle (including breeding cycles)	2
GRAYS HARBOR COUNTY	
Availability of food/pasture for animal	1
Availability/scheduling of processing	1
Demand (farmer's market, CSA, customer preference, meal traditions)	1
Quality of product (including age and size)	1
Convenience/fit/coordination with other farm, fair, or family considerations	1

REASON FOR SLAUGHTER DATE	NUMBER RESPONDING
MASON COUNTY	
Animal life cycle (including breeding cycles)	8
Availability of food/pasture for animal	7
Temperature/weather—avoid heat, cold, flood	2
Avoid cost of shelter	1
LEWIS COUNTY	
Animal life cycle (including breeding cycles)	6
Demand (farmer's market, CSA, customer preference, meal traditions)	4
Availability of food/pasture for animal	3
Availability/scheduling of processing	2
Temperature/weather—avoid heat, cold, flood	1
Convenience/fit/coordination with other farm, fair, or family considerations	1
Clallam County	
Availability of food/pasture for animal	1

At smaller estimated average herd sizes (of less than 100), the reasons for slaughter mirror the top reasons given across all respondents: animal life cycle, the availability of food/pasture, and demand. The reasons given were spread approximately evenly across counties in which respondents gave those answers.

At medium estimated average herd sizes (between 100 and 500), the reasons given for target dates centered on year-round customer demand for product, steady-income revenue, availability of food/pasture, and the lifecycle of the animal.

At larger estimated average herd sizes (of between 500 head and more), the reasons given for target dates centered on availability of food/pasture and animal life cycle, and the respondents giving these reasons were located in Kitsap and Pierce counties. It is also important to note that producers with herds of over 1,000 head work with processors and slaughterers outside of the study area given lack of capacity to accommodate size.

Barriers to Accessing Slaughter and Processing Services

Producers were also asked to name the barriers to accessing slaughter and processing services for their meat. Table C-2 provides the reasons given grouped by county and estimated size of county production of red meat based on qualitative responses given for average herd size. Cross-cutting reasons common in nearly every county were the lack of facility availability related to the need for advance scheduling (waits of a year were frequently mentioned) and the lack of a USDA-certified facility. The time and cost for transporting animals to distant facilities was also mentioned by many participants as a barrier.

TABLE C-2: BARRIERS FOR ACCESSING SLAUGHTER OR PROCESSING SERVICES BY COUNTY AND FREQUENCY

BARRIER TO ACCESSING SLAUGHTER OR PROCESSING SERVICES	NUMBER RESPONDING
PIERCE COUNTY	
Time, cost of travel; distance	1
THURSTON COUNTY	
Lack of facility availability/advance scheduling	11
Lack of available USDA facility	3
Facility limitations (lack of smaller cuts, fewer services, no special certification, slower speed, difficult communication)	3
Time, cost of travel; distance	2
Cost—unspecified	1
SNOHOMISH COUNTY	
Lack of available USDA facility	2
Lack of facility availability/advance scheduling	2
Facility limitations (lack of smaller cuts, fewer services, no special certification, slower speed, difficult communication)	1
KITSAP COUNTY	
Lack of facility availability/advance scheduling	1
Facility limitations (lack of smaller cuts, fewer services, no special certification, slower speed, difficult communication)	1
Lack of available USDA facility	1
Time, cost of travel; distance	2
GRAYS HARBOR COUNTY	
Lack of facility availability/advance scheduling	2
Lack of available USDA facility	1
MASON COUNTY	
Lack of facility availability/advance scheduling	6
Lack of available USDA facility	2
Facility limitations (lack of smaller cuts, fewer services, no special certification, slower speed, difficult communication)	2
Cost—unspecified	2
Time, cost of travel; distance	1
Herd size	1
LEWIS COUNTY	
Lack of facility availability/advance scheduling	7
Lack of available USDA facility	2
Facility limitations (lack of smaller cuts, fewer services, no special certification, slower speed, difficult communication)	1
Meat type	1
Lack of available USDA facility	2
CLALLAM COUNTY	
No responses given	--

At smaller estimated average herd sizes (of less than 100 head), the facility

availability related to the need for advance scheduling was the top-rated barrier (mentioned by 20 respondents in this category), followed by the lack of a USDA-certified facility (mentioned by nine respondents in this category). Facility limitations (lack of smaller cuts, fewer services, no special certification, slower speed, difficult communication) was third most often mentioned (by five respondents in this category).

At medium estimated average herd sizes (of between 100 and 500 head), the top-rated barrier mentioned by respondents was related to the facility availability for advanced scheduling (mentioned by nine respondents in this category), followed by facility limitations (mentioned by three respondents in this category). A lack of available USDA facilities was third most often mentioned (by two respondents in this category).

At larger estimated average herd sizes (of between 500 head and more), only one respondent in this category responded, citing the time and cost of travel and/or distance as the barrier to accessing slaughtering and processing services.

Willingness to Transport Animals

The 2023 survey asked producers how far they were willing to transport animals for slaughter or processing. The 67 survey respondents were able to select all answers that applied. Slightly less than one-third (30 percent) slaughter and/or process on-farm or use a mobile service for slaughtering and/or processing. Slightly less than one-third (29 percent) are willing to transport animals 25 to 50 miles and another 24 percent indicated that they were willing to drive less than 25 miles.

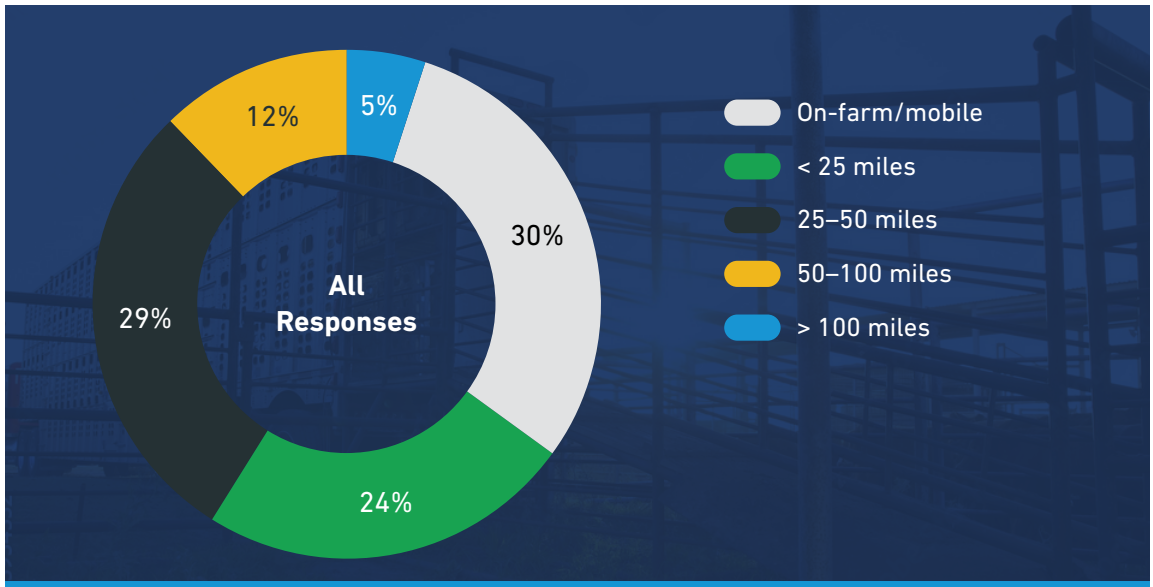


FIGURE C-1: DISTANCE PRODUCER IS WILLING TO TRANSPORT ANIMALS ALL LIVESTOCK—ALL RESPONSES

Willingness to Transport by County

The distribution of willingness to transport in Pierce County mirrored the overall distribution across all counties, with the exception that more producers reported using on-farm or mobile services (Table C-3). In Thurston County, more respondents reported willingness to transport animals 25 to 50 miles than did respondents in other counties. Lewis County producers, like Pierce County producers, more frequently reported using on-farm or mobile services and least-frequently indicated willingness to travel 50 or more miles for slaughtering and/or processing. Mason County producers also frequently reported using on-farm or mobile services and indicated no willingness to transport stock more than 100 miles.

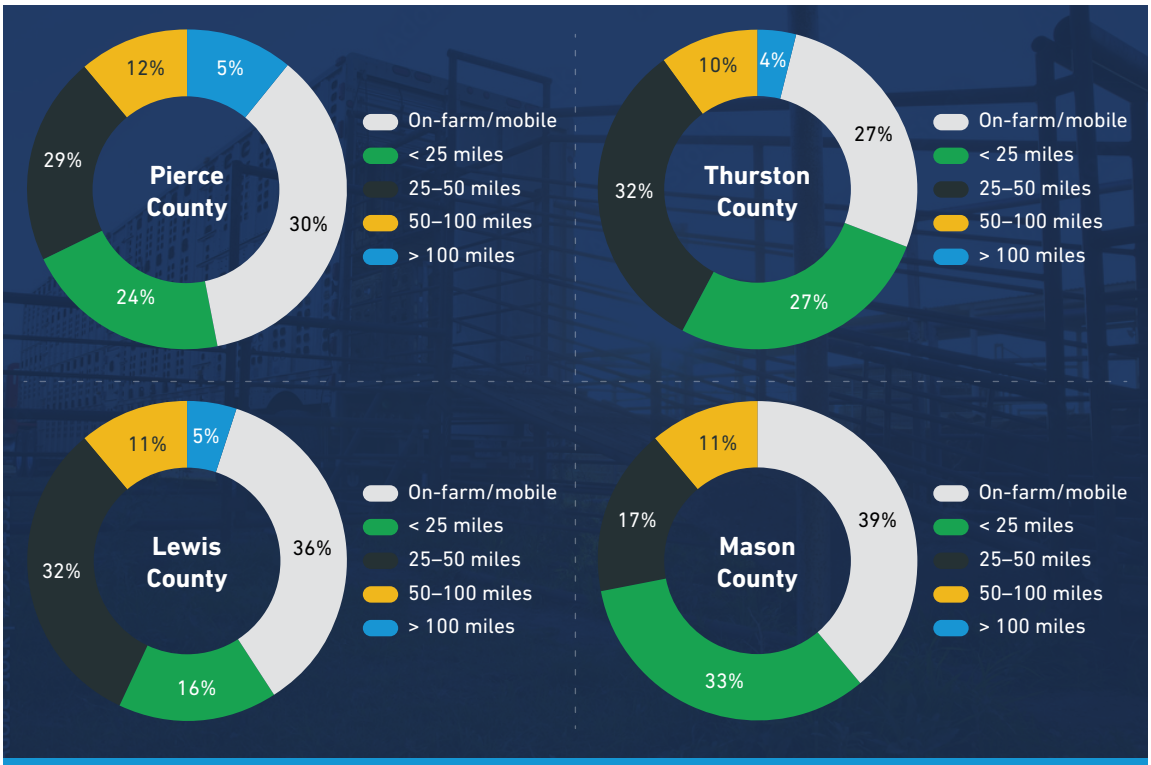


FIGURE C-2: DISTANCE PRODUCER IS WILLING TO TRANSPORT ANIMALS ALL LIVESTOCK—BY COUNTY

TABLE C-3: DISTANCE PRODUCER IS WILLING TO TRANSPORT HERD OR FLOCK, ALL LIVESTOCK—BY COUNTY

COUNTY	NUMBER REPORTING DISTANCE WILLING TO TRANSPORT (MILES)				USES ON-FARM OR MOBILE SERVICE
	< 25	25 – 50	50 – 100	> 100	
Pierce County	4	4	2	2	7
Thurston County	8	10	3	1	8
Snohomish County	1	3	1	--	--
Kitsap County	--	2	1	1	1
Grays Harbor County	3	2	--	--	--
Mason County	6	3	2	--	7
Lewis County	3	6	2	1	7
Clallam County	--	--	1	--	1

Note: -- = no data.

Willingness to transport did not vary by herd or flock size; responses in the distance categories were spread across all reported herd sizes.

Willingness to Transport by Livestock Type

Of the reported livestock types, only producers with cattle or lambs showed marked distributions in the responses regarding willingness to transport. Producers with cattle were more likely to use on-farm or mobile services than all respondents, were slightly more likely to drive more than 100 miles, and were less likely to drive 25 to 50 miles than all respondents. Producers with lambs were more likely to transport their stock 25 to 50 miles and indicated willingness to transport their lambs 50 to 100 miles for processing.

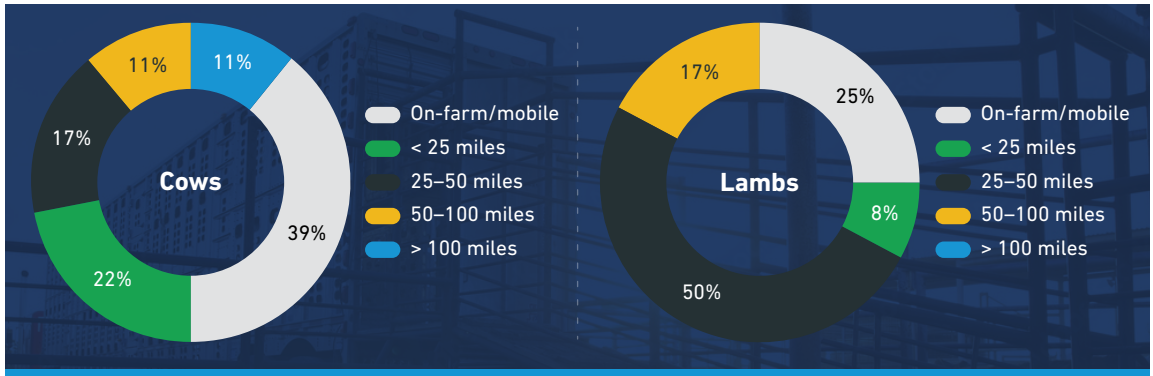


FIGURE C-3: DISTANCE PRODUCER IS WILLING TO TRANSPORT HERD OR FLOCK, ALL LIVESTOCK—BY LIVESTOCK

Focus Groups

This section summarizes key takeaways and overarching themes heard during the focus groups. All anonymized comments shared in the focus groups are in Appendix D.

Barriers

During the focus group, participants were presented with a list of the top barriers identified in the survey and were asked to expand on those listed barriers. Key themes and takeaways from the discussion are indicated below:

- **Lack of slaughter and processing facilities:** The limited number of slaughter and processing (S&P) facilities in Pierce and Thurston counties was frequently named as a top barrier for producers. **The lack of S&P facilities has direct impacts to producers' herd management, production capacity, and opportunities to expand.** Additional barriers and subsequent impacts resulting from the lack of S&P facilities include:

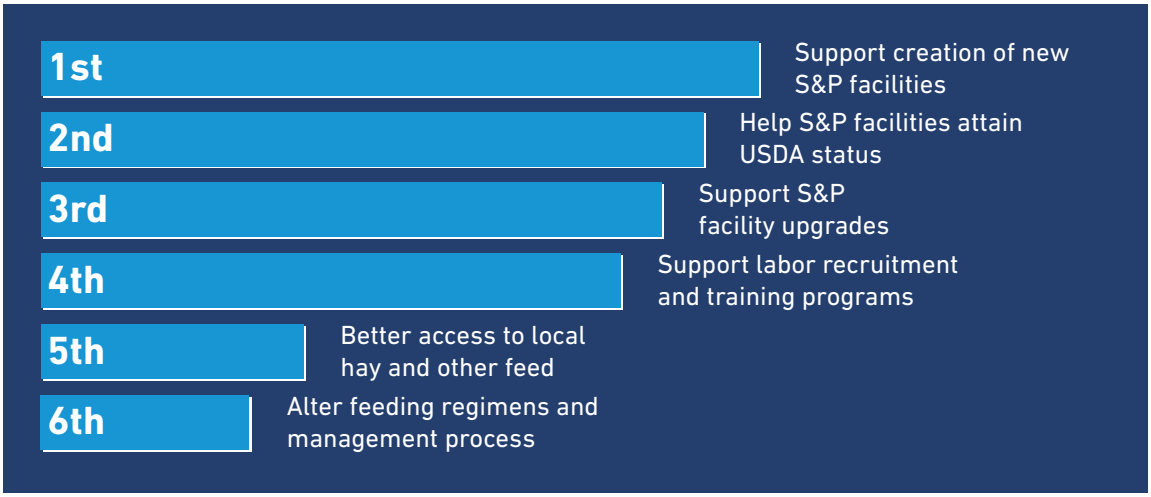
- » **Long wait times:** Producers are frequently forced to schedule slaughter dates anywhere from 12–24 months in advance due to lack of capacity at S&P facilities. This causes producers to have to forecast animal availability in the future, leading to an inability to increase herd size or expand operations due to uncertainty.
- » **Non-prime slaughter dates:** Inaccessibility to S&P facilities and available dates often forces producers to slaughter animals when they are not in their prime. This may result in added costs of feed, warmth, and shelter to keep animals beyond prime, and causes producers to extend or shorten the animal's breeding cycle, resulting in lower yield.
- » **USDA facilities and regulations:** Many producers use custom exempt facilities due to a lack of USDA-inspected facilities. State and federal laws and regulations limit where custom exempt meat can be sold compared to USDA-inspected meats, which limits their ability to expand product sales.

- **Cost:** Rising costs of S&P facilities cause producers to increase their product sale prices, which diminishes their competitive advantage in the market.
- **Infrastructure and equipment:** Many producers are constrained by their available land and infrastructure, as well as equipment to manage land and haul animals. Additionally, a lack of freezer/cold storage facilities in Pierce and Thurston counties limits producers' capacity to store their product.
- **Experience and education gap:** There is a wide range of experience and knowledge among producers. This education and experience gap often results in varying approaches to herd management, willingness to compromise with slaughter practices, and inequities in scheduling with S&P facilities.

Solutions

During the focus group, participants were asked to rank solutions from most helpful to least helpful in reducing the barriers to S&P services. Participants ranked the benefits in the following order:

FIGURE 3: PRODUCER-RANKED SOLUTIONS FOR ADDRESSING S&P BARRIERS.



Upon further discussion around the ranking, the following solutions were identified as being the most helpful in reducing barriers to the S&P services:

- Support overall creation of additional S&P facilities
- Add new or upgrade existing facilities to USDA-inspecteded facilities
- Support training, recruitment, and retention for S&P careers
- Mitigate costs and regulations of slaughter, processing, and sale of product

Additional Observations

Some producers were unable to attend the focus groups but sent feedback via email. Their thoughts largely echoed the feedback from the focus groups, but a few additional thoughts are captured below.

- **Fixed mobile slaughter location:** Having mobile slaughter units permanently or periodically remain at fixed locations would increase accessibility for many producers who are able to transport their animals and increase efficiency and capacity for slaughterers as it cuts down driving time for mobile units.
- **Viability of businesses:** It is important for each business—producers, slaughterers, and processors—to be viable in this process.

PROCESSOR FEEDBACK

Pierce and Thurston counties distributed an online survey to meat processors in the central and south Puget Sound region to better understand their capacity and barriers they are facing to retain and expand their processing capacity. Given the time constraints for this group, Pierce County primarily gathered data through follow-up one-on-one phone calls to the processors that were identified by producers as most frequently used. A total of eight respondents participated.

This section summarized key takeaways and overarching themes from these surveys. All anonymized survey responses are located in Appendix G.

Surveys

Barriers

During the survey and one-on-one phone calls, participants were asked to rank and comment on their top barriers. The primary barriers that processors faced included:

- **Storage space:** Lack of adequate storage space was identified as a top barrier for expanding capacity, specifically a lack of cooler and freezer space to store carcasses after slaughter.
- **Waste management:** Waste management was not a challenge for most participants' businesses. However, the business that did indicate waste management was a challenge listed permitting and inspection issues, lack of rendering services, and off-site disposal options as the most important concerns.

- **Labor challenges:** Most participants indicated they are experiencing labor challenges that impact their ability to increase capacity. The most important concerns they were facing included access to apprenticeship programs, wages and benefits, retention, and training new staff.
- **Balance of labor, storage, and capacity:** While most participants indicated a desire to expand their business, that expansion often hinges on building additional space and available labor. However, with fluctuating storage capacity due to the seasonality of demand, processors often experience labor retention issues. Processors face a challenge in finding a balance between labor and storage that works together in escalation.
- **Cost:** Most participants indicated they intend to expand their business, however the cost of doing so is the biggest barrier to growth.

Solutions

During the survey and one-on-one phone calls, participants were asked to identify solutions that would help solve their barriers. The solutions that processors identified included:

- **Facility and equipment upgrades:** When participants were asked how they would spend $100,000 to increase their capacity, most indicated they would spend it on upgrades to their equipment and facilities and adding more coolers, freezers, and storage space, which would allow them to process and store more animals.
- **Additional funding:** Participants identified receiving grants or loans to purchase more land or building space for operation as well as for hiring on-the-job trainees as the most impactful solutions to addressing barriers.

Additional Observations

As part of the survey's one-on-one phone calls, Pierce County had detailed conversations with each respondent that did not pertain to a survey question. Key takeaways from these conversations are summarized below.

- **Rapid growth:** All participants have been in business seven years or less, with the majority being in business two years or less. Despite being in business for a short amount of time, they have expanded rapidly and now serve hundreds of unique clients and process hundreds of animals annually.

- **Peak processing:** Participants indicated their peak time for processing dates ranged from September to March for beef, pork, and lamb, while their off-peak dates were from April to August.

SLAUGHTERER FEEDBACK

Pierce and Thurston counties distributed an online survey to slaughterers in the central and south Puget Sound to better understand their capacity and barriers they are facing to retain and expand their processing capacity. Given the time constraints for this group, Pierce County primarily gathered data through follow-up one-on-one phone calls to the slaughterers that were identified by producers as most frequently used. A total of 12 respondents participated.

This section summarized key takeaways and overarching themes from these surveys. All anonymized survey responses are located in Appendix H.

Surveys

Barriers

During the survey and one-on-one phone calls, participants were asked to rank and comment on their top barriers. The primary barriers that slaughterers faced included:

- **Waste management:** All participants indicated waste management is a challenge for their business. Of the various concerns listed, they identified the cost of disposal options as the most important concern and the lack of on-site cold storage to hold waste before disposal as the least important.
- **Facility/equipment challenges:** Most participants indicated facility and equipment challenges as being a barrier to increasing their slaughter capacity. Of the various concerns listed, they indicated producer site accessibility and usability for mobile slaughter operations as the most important concern, with cooler storage capacity and kill floor square footage as the least important.
- **Varying capacity:** While most facilities slaughter throughout the year, they experience peak slaughtering times periodically during the year and have limited capacity, mainly during the late summer to late winter months. This results in varying capacity throughout the year, which results in challenges for their business, especially retention of staff during the slower times.
- **Fuel and travel times:** High fuel costs and long travel times between customers present major barriers to long-term sustainability. Customer cancellations also create sunk costs when advance notice is not given.

Solutions

During the survey and one-on-one phone calls, participants were asked to identify solutions that would help solve their barriers. The solutions that slaughterers identified included:

- **Aggregation of animals:** Having farmers bring their animals to a central location for slaughter would increase efficiency for mobile slaughter units by decreasing travel time between farms.
  - » Systems to move animals to centralized facilities may be required to implement this.
  - » Lewis County experience with haulers may be informative.
- **Varied solutions based on experience:** Newer businesses are experiencing different challenges than those who are more established. This was demonstrated in the open-ended question related to funding, which asked how they would spend $100,000 to increase their slaughter capacity. The more established businesses (10-15 years old) indicated they would spend money on equipment to help them increase capacity, while the newer business (2 years old) indicated they would spend it on advertising to gain more customers.
- **Grant funding:** Many businesses are using state grant funding to support their operations and help expand their capacity, such as increasing cooler and storage space or upgrading equipment. However, USDA facilities face a challenge with using state grants due to the short time frame in which to spend the funds (often as short as a year). For many USDA facilities, they need at least two to three years to complete projects due to the regulatory cycles and a need to meet criteria for USDA inspections.

Additional Observations

As part of the survey's one-on-one phone calls, Pierce County had detailed conversations with each respondent that discussed issues that were not part of the survey. Key takeaways from these conversations are summarized below.

- **Planning and logistics:** There is a need for improved systems and logistics to increase efficiency for mobile and fixed S&P facilities. Many businesses are experiencing challenges with scheduling their clients and keeping them in clusters that are close to each other.
- **Aggregated locations:** While having an aggregated location would increase efficiencies for slaughterers, there are several barriers to implementing this

option. Many producers do not have the necessary equipment to move their animals to a central location. Additionally, there needs to be a planning and logistical structure to make possible this aggregated slaughter location, which is difficult in an industry that is fragmented.

- **Rapid growth:** Participants had been in business between two and 15 years and they each served 200+ unique clients and slaughtered hundreds of animals annually.
- **Slaughter scheduling coordination:** Many processing shops coordinate slaughter for the clients, which can create another layer of complexity as scheduling is being done directly by some farms and processing shops. Processing shops' involvement is critical since they provide the end-user the whole or portion of an animal carcass in conjunction with WSDA custom exempt requirements.

ADDITIONAL OBSERVATIONS

In addition to the engagement that was conducted in 2022 and 2023 by Pierce County, the Washington State Department of Agriculture (WSDA) and WSU conducted their own surveys about the same topic and shared their findings. The survey findings from both surveys are summarized below.

2019 Peninsula Survey

In 2019, WSU sent a survey to meat producers in 12 western Washington State counties (Clallam, Island, Jefferson, King, Kitsap, Kittitas, Mason, Pierce, San Juan, Skagit, Snohomish, and Thurston counties). A total of 77 respondents participated. Of the respondents, 81 percent (63 of 77) derive income from the sale of red meat. Anonymized survey responses are summarized below and in Appendix I.

Slaughtering Services

The survey asked producers of red meat about their level of satisfaction with the USDA-inspected slaughtering services. The majority (81 percent) reported not being fully satisfied with their current USDA-inspected service.

The top reasons for dissatisfaction included facility proximity, scheduling, and cost (Table 6).

TABLE C-4. REASONS FOR DISSATISFACTION WITH CURRENT USDA-INSPECTED SLAUGHTER FACILITIES

REASONS FOR DISSATISFACTION WITH USDA FACILITIES	NUMBER OF RESPONSES
Facility is not close enough	15
Processing is too hard to schedule	15
Cost	7
Lack of services (such as scalding, curing)	5
Unsatisfactory facility service (improper labeling, poor communications, handling of byproducts, lack of connection with processor)	4
Facility capacity	2
Cost	2
Unreliability	2
Distance to facility	1

Producers reported traveling an average of 110 miles one way to a USDA-inspected slaughter facility and 20 producers indicated that the average travel distance to a facility is 120 miles.

When asked under which conditions producers would use a new USDA-inspected slaughter service, the top three answers were (1) if it was closer to my farm, (2) if pricing was competitive, (3) if scheduling was easy.

Of the producers willing to transport their animals for slaughter, 26 indicated that they would be willing to travel up to 25 miles and another 17 would be willing to travel up to 50 miles.

The survey asked producers of red meat that do not sell USDA-inspected meat why they did not use the USDA-inspected facilities. The majority (26) reported that USDA-inspected facilities are not close enough. Other reasons given included the following:

- Cost at USDA-inspected facilities is prohibitive—20 mentioned
- Preference to not transport livestock—18 mentioned
- The producer is unaware of available USDA-inspected services—4 mentioned
- The producer is not interested in selling USDA-inspected meat—2 mentioned

If new USDA-inspected slaughter services were available, up to 73 respondents would (58) or might (15) consider using it.

Processing Services

Producers were asked to rate their satisfaction with processing facilities. About half report being satisfied (13 of 24) or partly satisfied (9 of 24) with processing facilities.

The top reasons for dissatisfaction with processing facilities included facility proximity, scheduling, and cost; however, 11 comments were made about dissatisfaction with the reliability and quality of the processing services (Table C-7).

TABLE C-5. REASONS FOR DISSATISFACTION WITH USDA-INSPECTED PROCESSING FACILITIES

REASONS FOR DISSATISFACTION WITH PROCESSING FACILITIES	NUMBER OF RESPONSES
Facility is not close enough	9
Slaughtering is too hard to schedule	7
Cost	5
Unsatisfactory facility service (improper labeling, handling of byproducts, lack of connection with butcher, poor communication, poor end product quality)	11
Dissatisfaction with number of services (such as cut and wrap, lack of curing)	4
Processing time/scheduling	2
Transporting animals is prohibitive	2

Suggestions to Improve

Producers offered the following suggestions to improve the slaughtering and processing facilities in the area:

- Access to USDA slaughtering and processing, both in proximity to and availability of high-quality services is the key issue for those surveyed.
- Change legislation to allow county or state inspection of facilities.
- Expand efforts to poultry processing.
- A key theme was offering slaughtering and processing services that provide for humane, halal, and/or organic processing.
- Slaughtering and processing that has the capacity to anticipate what one respondent called “natural conditions, drought, flood, temperature” would help several of the respondents who mentioned available pasture or need to shelter animals as a primary driver for when they slaughter their animals.
- More clarity on scheduling for slaughter of animals that have not even been born yet—this may be technical/farmer training effort where mentorship from more experienced farms may be an opportunity.

2022 WSDA Meat Processing Capacity Survey

In June 2022, the Washington State Department of Agriculture (WSDA) conducted a survey of statewide meat processing facilities to gain a better understanding of the state's capacity for meat processing after slaughter. Fifty-four processors participated.

While the data has not yet been published, at a high level, the findings from the processor survey largely reflect the findings from Pierce and Thurston County's 2023 outreach and engagement with processors, including limitations due lack of freezer capacity, size of facility, and labor challenges. This survey also echoed the 2023 survey findings in noting that waste disposal is a significant issue and limiting factor for production facilities

APPENDIX D

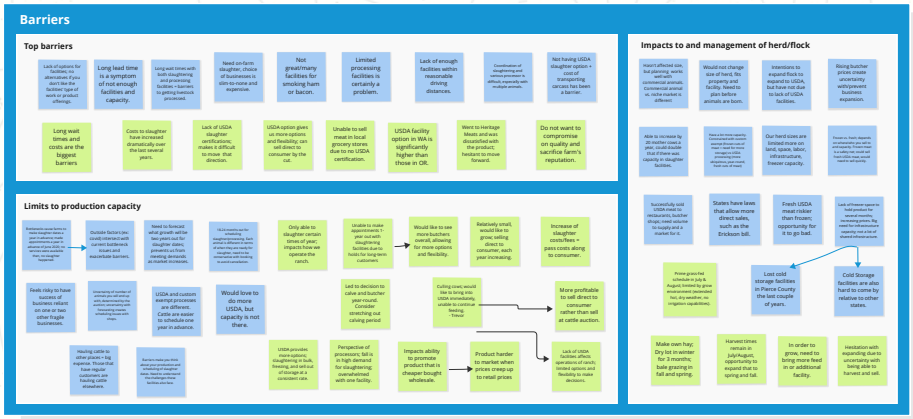
Producer Focus Groups Combined Miro Board

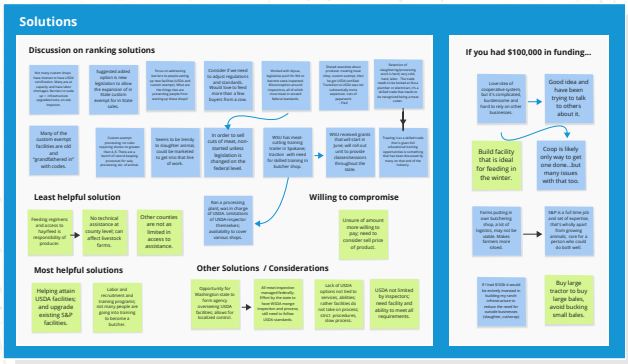
South and Central Puget Sound Producer Focus Groups

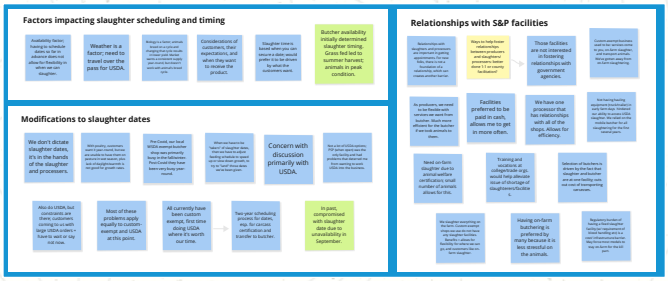
Pierce County

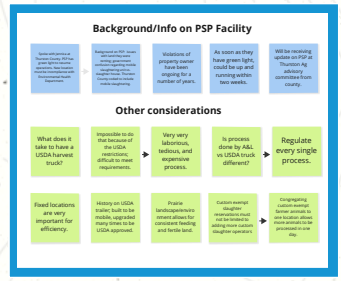
4/13 Focus Group Feedback

4/18 Focus Group Feedback









POLL RESULTS

Please rank the following solutions in order from being most to least helpful in reducing barriers to the slaughter/processing services:

1st	Support creation of new S&P facilities
2nd	Help S&P facilities attain USDA status
3rd	Support S&P facility upgrades
4th	Support labor recruitment and training programs
5th	Better access to local hay and other feed
6th	Alter feeding regimens and management practices

4/13 Focus group:

- 1st: Support creation of new S&P Facilities
- 2nd: Help S&P facilities attain USDA status
- 3rd: Support S&P facility upgrades
- 4th: Support labor recruitment and training programs
- 5th: Better access to local hay and other feed
- 6th: Alter feeding regimens and management practices

4/18 Focus group:

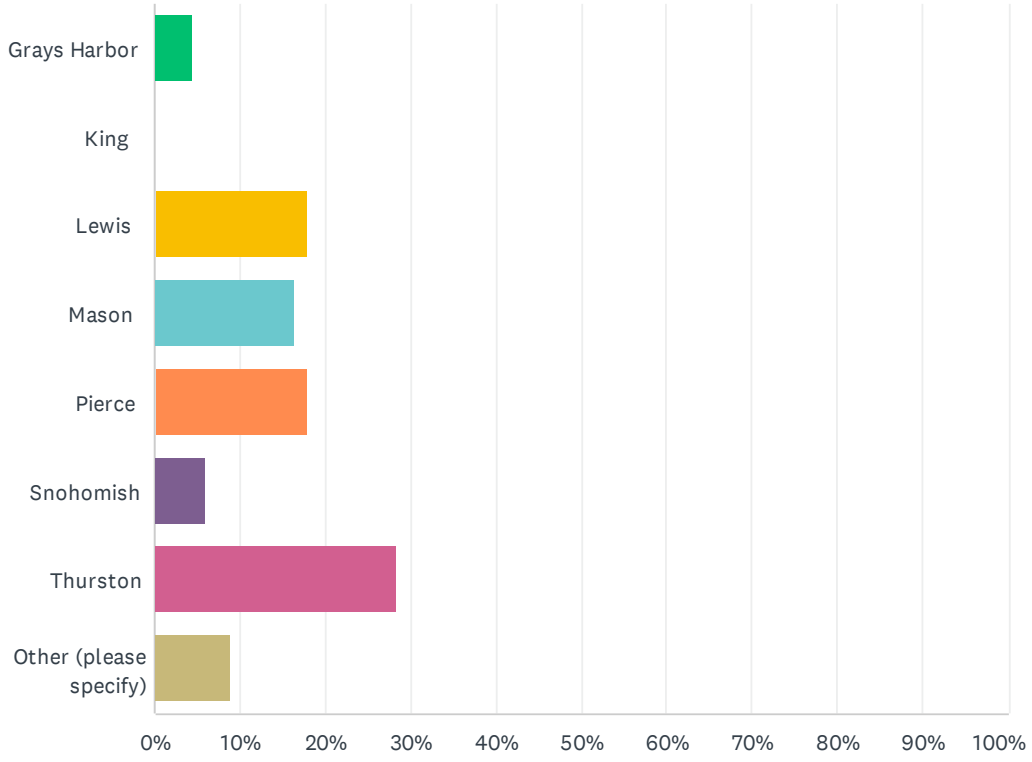
- 1st: Help S&P facilities attain USDA status
- 2nd: Support S&P facility upgrades
- 3rd: Support labor recruitment and training programs
- 4th: Support creation of new S&P Facilities

APPENDIX E

2023 PRODUCER SURVEY

Q1 What county do you operate in?

Answered: 67 Skipped: 0



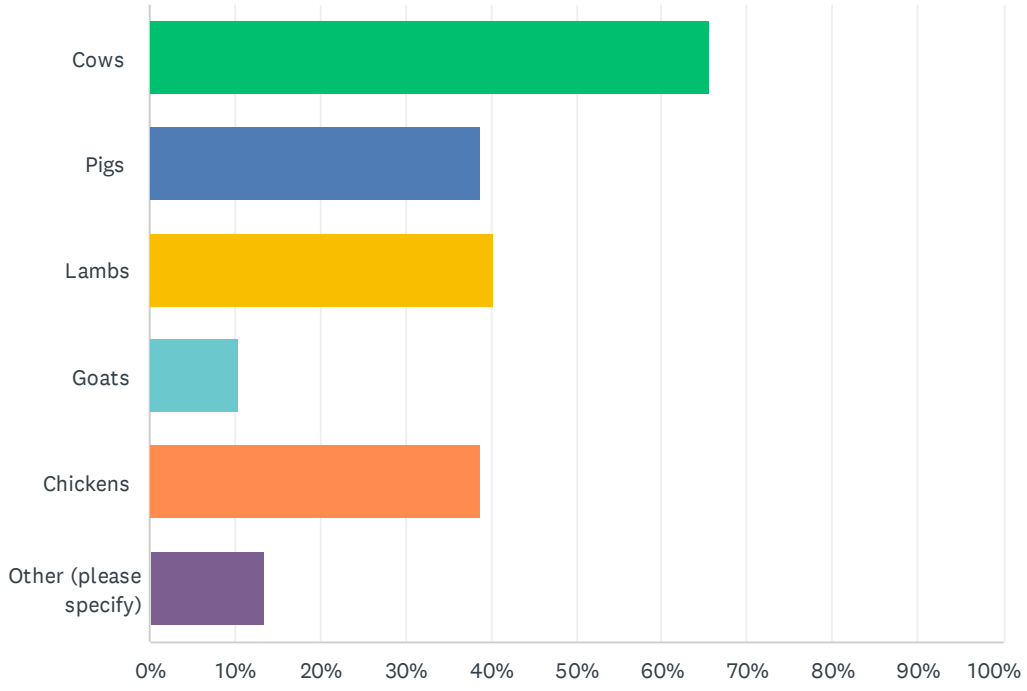
ANSWER CHOICES	RESPONSES	
Grays Harbor	4.48%	3
King	0.00%	0
Lewis	17.91%	12
Mason	16.42%	11
Pierce	17.91%	12
Snohomish	5.97%	4
Thurston	28.36%	19
Other (please specify)	8.96%	6
TOTAL		67

#	OTHER (PLEASE SPECIFY)	DATE
1	Kitsap	3/24/2023 5:34 AM
2	Kitsap	3/23/2023 9:03 PM
3	Kitsap	3/23/2023 7:56 PM
4	Clallam	3/23/2023 3:21 PM

5	KITSAP - which seems like a major omission for a regional processing site	3/23/2023 3:06 PM
6	Thurston, Mason, Grays Harbor, and Lewis	3/8/2023 1:44 PM

Q2 What types of herds and/or flocks do you maintain and slaughter each year?Check all that apply.

Answered: 67 Skipped: 0



ANSWER CHOICES	RESPONSES	
Cows	65.67%	44
Pigs	38.81%	26
Lambs	40.30%	27
Goats	10.45%	7
Chickens	38.81%	26
Other (please specify)	13.43%	9
Total Respondents: 67		

#	OTHER (PLEASE SPECIFY)	DATE
1	ryukyu sika deer (a federally protected endangered species	3/24/2023 12:24 PM
2	Ducks	3/23/2023 7:56 PM
3	Turkeys	3/21/2023 5:22 PM
4	heifers and steers	3/15/2023 8:11 AM
5	Turkeys	3/12/2023 11:29 AM
6	I am retired but had cattle. I also am part of Lewis County Farm Bureau and have knowledge of the issues of many of our producers	3/11/2023 10:53 AM

7	Rabbits as well, looking to add chickens and turkeys to the sale.	3/10/2023 6:15 AM
8	Turkeys	3/4/2023 10:27 AM
9	Turkey	3/3/2023 9:58 PM

Q3 What is your average maintained herd/flock size?Fill in average herd/flock sizes for all that apply.

Answered: 67 Skipped: 0

ANSWER CHOICES	RESPONSES	
Cows	67.16%	45
Pigs	37.31%	25
Lambs	41.79%	28
Goats	11.94%	8
Chickens	40.30%	27
Other (please specify type of animal)	11.94%	8

#	COWS	DATE
1	6	3/27/2023 11:20 AM
2	6	3/27/2023 8:52 AM
3	200	3/25/2023 12:47 PM
4	160	3/25/2023 7:30 AM
5	5	3/24/2023 8:35 PM
6	15	3/24/2023 12:24 PM
7	20	3/24/2023 5:34 AM
8	3	3/23/2023 9:03 PM
9	10	3/23/2023 7:56 PM
10	30	3/23/2023 7:06 PM
11	3	3/23/2023 4:45 PM
12	8	3/23/2023 3:21 PM
13	5	3/23/2023 3:06 PM
14	6	3/23/2023 12:40 PM
15	20-25 steers	3/22/2023 3:17 PM
16	36	3/22/2023 3:04 PM
17	50	3/21/2023 2:01 PM
18	12	3/17/2023 12:56 PM
19	9	3/17/2023 11:11 AM
20	0-30	3/16/2023 9:08 AM
21	115	3/15/2023 10:37 PM
22	85	3/15/2023 1:56 PM
23	2	3/15/2023 10:15 AM
24	75	3/15/2023 8:11 AM

25	50	3/11/2023 10:53 AM
26	60	3/10/2023 8:32 PM
27	120	3/10/2023 8:18 PM
28	5	3/10/2023 7:05 PM
29	12	3/10/2023 6:15 AM
30	12	3/9/2023 2:30 PM
31	100	3/8/2023 8:27 PM
32	150	3/8/2023 1:44 PM
33	45	3/8/2023 8:07 AM
34	15	3/8/2023 7:27 AM
35	35	3/8/2023 12:02 AM
36	15	3/7/2023 2:15 PM
37	20	3/7/2023 2:08 PM
38	4	3/7/2023 12:01 PM
39	6	3/7/2023 10:38 AM
40	150	3/6/2023 4:59 PM
41	10	3/6/2023 9:44 AM
42	5	3/6/2023 8:33 AM
43	10	3/4/2023 1:12 PM
44	8	3/3/2023 9:58 PM
45	130	3/3/2023 10:55 AM
#	**PIGS**	**DATE**
1	3	3/28/2023 6:09 PM
2	1-2	3/27/2023 8:52 AM
3	50	3/25/2023 12:47 PM
4	50	3/25/2023 7:30 AM
5	30	3/24/2023 5:34 AM
6	8	3/23/2023 9:03 PM
7	80	3/23/2023 7:56 PM
8	12 sows 30 butcher pigs, 4 boars assorted weaners	3/23/2023 4:30 PM
9	10	3/23/2023 3:06 PM
10	3	3/23/2023 12:38 PM
11	16	3/22/2023 3:04 PM
12	40	3/21/2023 2:01 PM
13	8	3/21/2023 1:50 PM
14	10	3/16/2023 9:08 AM
15	10	3/15/2023 10:37 PM
16	10	3/15/2023 1:56 PM

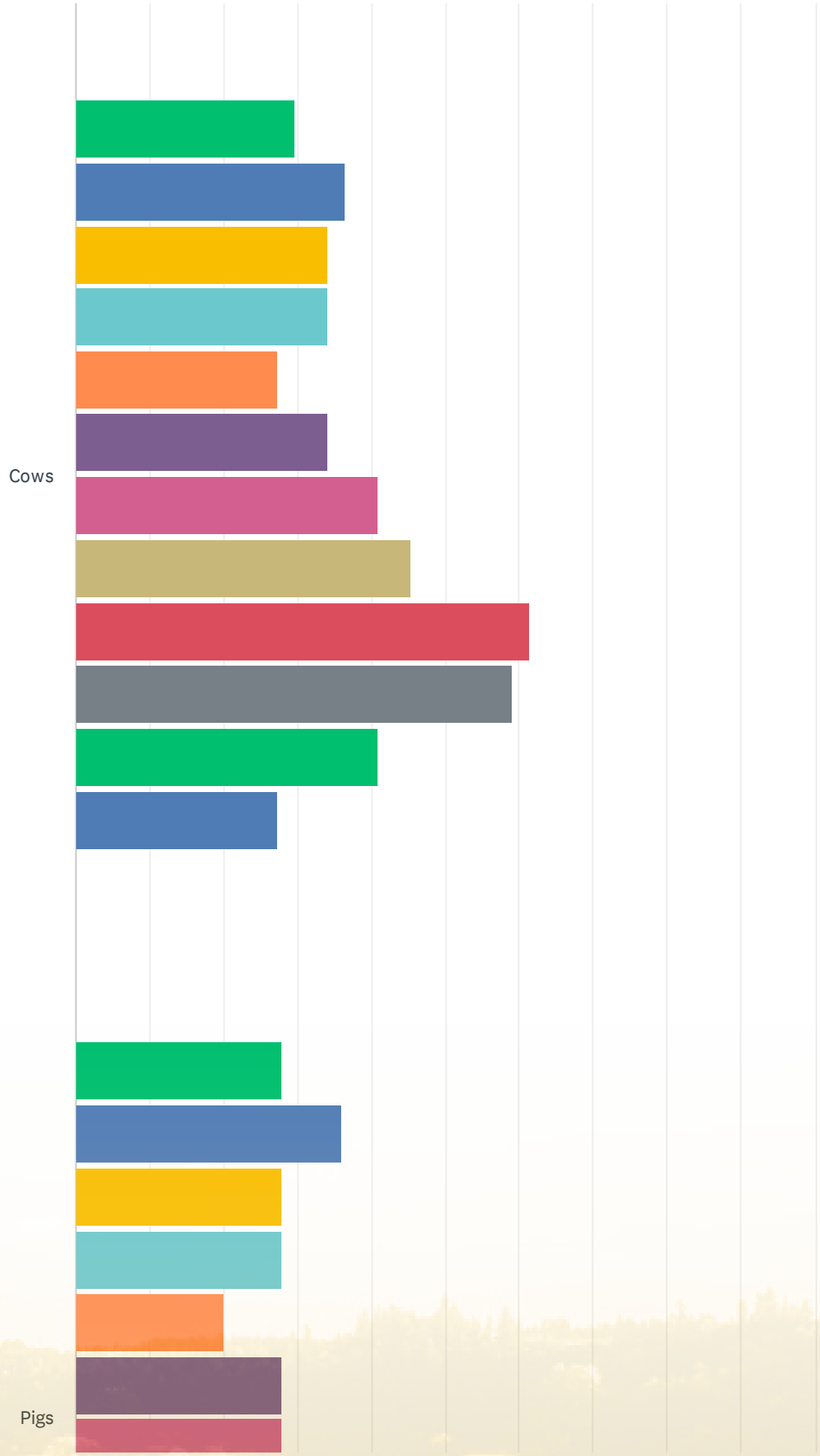
17	25	3/15/2023 8:11 AM
18	5-15	3/14/2023 7:26 PM
19	10	3/10/2023 7:05 PM
20	25	3/10/2023 6:15 AM
21	10	3/8/2023 7:27 AM
22	10	3/8/2023 12:02 AM
23	3	3/7/2023 10:15 PM
24	10	3/4/2023 1:12 PM
25	20	3/3/2023 9:58 PM
#	**LAMBS**	**DATE**
1	8	3/28/2023 6:09 PM
2	4	3/27/2023 8:52 AM
3	45	3/25/2023 12:47 PM
4	10	3/24/2023 8:35 PM
5	6	3/24/2023 5:34 AM
6	60	3/23/2023 7:56 PM
7	25	3/23/2023 5:01 PM
8	25	3/23/2023 12:38 PM
9	25	3/22/2023 3:04 PM
10	60	3/21/2023 11:22 AM
11	150	3/20/2023 6:54 PM
12	30	3/16/2023 9:08 AM
13	8	3/15/2023 10:15 AM
14	40-60	3/14/2023 7:26 PM
15	50	3/14/2023 3:19 PM
16	+/-20	3/12/2023 11:29 AM
17	7 ewes producing 8-9 lambs a year	3/11/2023 5:38 PM
18	60	3/10/2023 8:18 PM
19	20	3/10/2023 7:05 PM
20	30	3/10/2023 3:58 PM
21	40	3/10/2023 6:15 AM
22	10	3/8/2023 8:07 AM
23	0	3/8/2023 12:02 AM
24	2	3/7/2023 10:15 PM
25	125	3/7/2023 2:15 PM
26	30	3/7/2023 8:11 AM
27	9	3/6/2023 3:47 PM
28	20	3/3/2023 9:58 PM

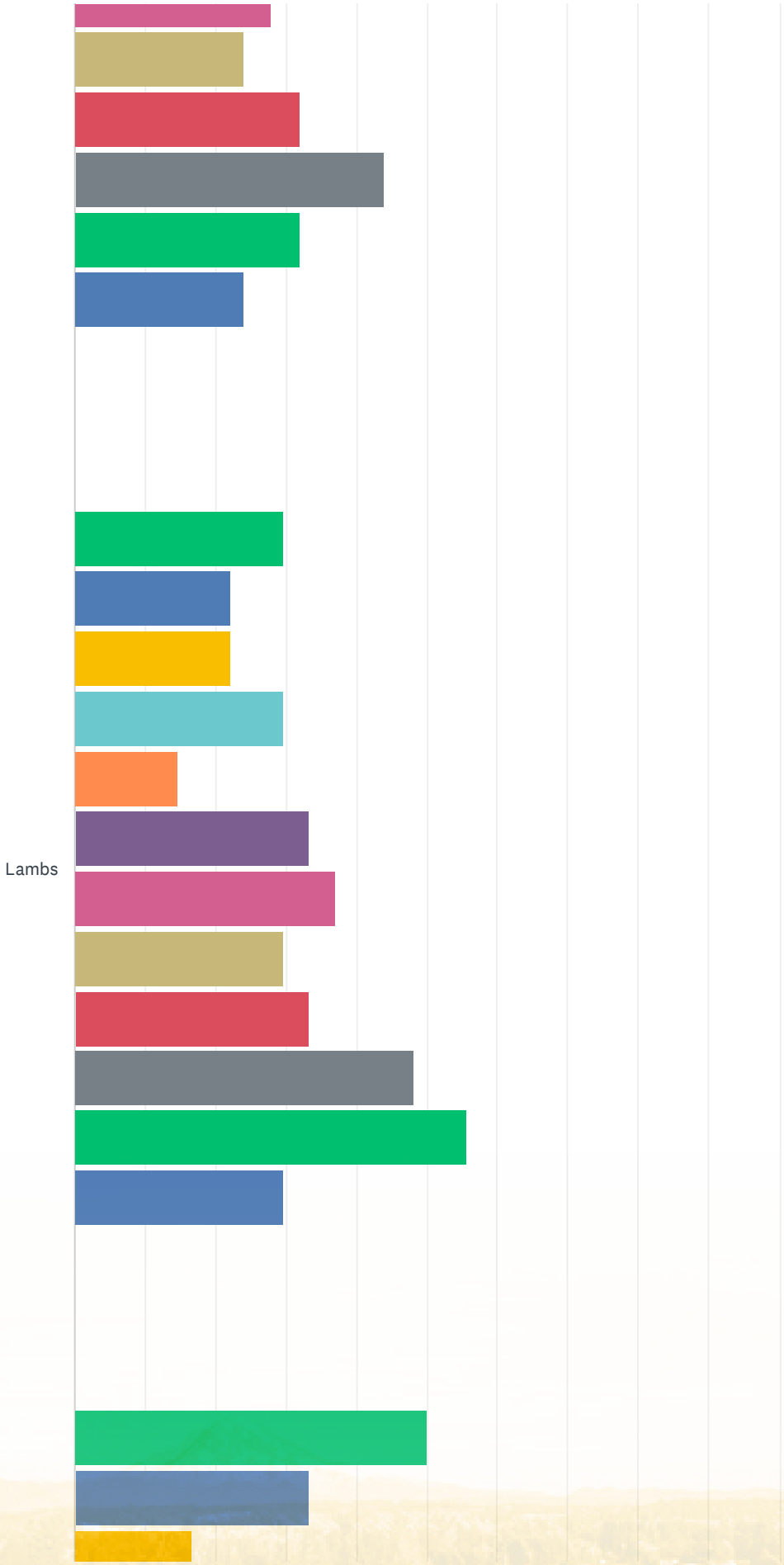
#	GOATS	DATE
1	0	3/27/2023 8:52 AM
2	15	3/25/2023 12:47 PM
3	50	3/23/2023 3:21 PM
4	6	3/14/2023 2:02 PM
5	15	3/10/2023 6:15 AM
6	15	3/10/2023 5:53 AM
7	50	3/8/2023 7:27 AM
8	15	3/7/2023 2:15 PM
#	CHICKENS	DATE
1	12	3/27/2023 11:20 AM
2	15	3/27/2023 8:52 AM
3	50	3/25/2023 12:47 PM
4	550	3/24/2023 5:34 AM
5	400	3/23/2023 9:03 PM
6	60	3/23/2023 7:56 PM
7	100	3/23/2023 4:45 PM
8	50	3/23/2023 3:06 PM
9	150	3/23/2023 12:38 PM
10	15	3/23/2023 12:23 PM
11	160	3/23/2023 12:04 PM
12	100	3/21/2023 5:22 PM
13	12	3/17/2023 11:11 AM
14	30	3/15/2023 10:37 PM
15	10,000	3/14/2023 7:26 PM
16	100	3/14/2023 2:02 PM
17	30 seasonally	3/12/2023 11:29 AM
18	60	3/10/2023 8:20 PM
19	400	3/10/2023 3:58 PM
20	0	3/10/2023 6:15 AM
21	100+	3/8/2023 7:27 AM
22	50	3/7/2023 10:15 PM
23	100	3/7/2023 2:15 PM
24	70	3/6/2023 3:47 PM
25	200-600	3/4/2023 1:12 PM
26	400	3/4/2023 10:27 AM
27	2000	3/3/2023 9:58 PM
#	OTHER (PLEASE SPECIFY TYPE OF ANIMAL)	DATE
1	80+	3/24/2023 12:24 PM

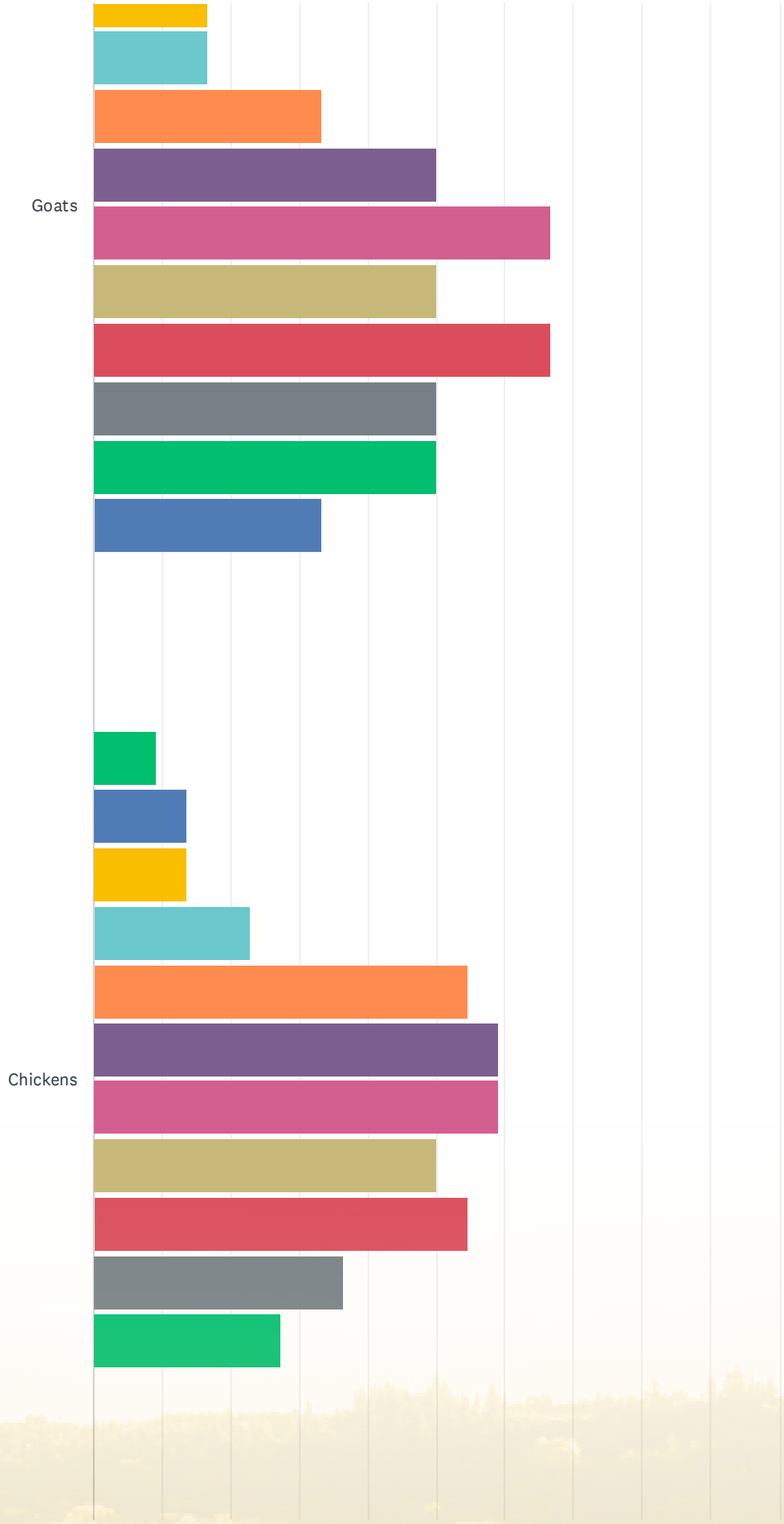
2	Ducks 30	3/23/2023 7:56 PM
3	Turkeys	3/21/2023 5:22 PM
4	heifers and steers 120	3/15/2023 8:11 AM
5	25-30 seasonally	3/12/2023 11:29 AM
6	15 rabbits	3/10/2023 6:15 AM
7	50	3/4/2023 10:27 AM
8	400 turkey	3/3/2023 9:58 PM

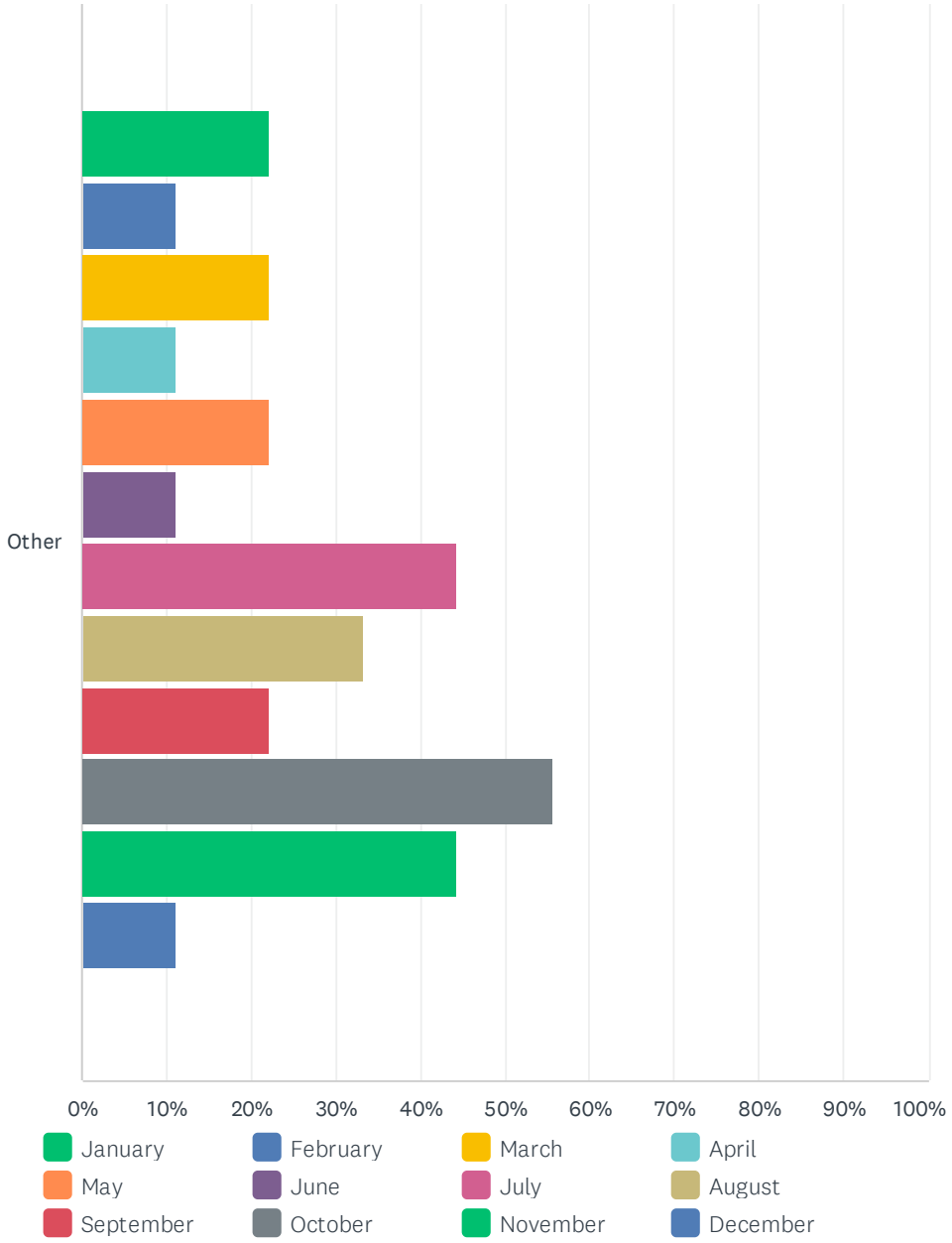
Q4 What are your target slaughter dates?Check all months that apply.

Answered: 67 Skipped: 0




Lambs


Goats
Chickens



	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBE
Cows	29.55% 13	36.36% 16	34.09% 15	34.09% 15	27.27% 12	34.09% 15	40.91% 18	45.45% 20	61.36% 27	59.09
Pigs	28.00% 7	36.00% 9	28.00% 7	28.00% 7	20.00% 5	28.00% 7	28.00% 7	24.00% 6	32.00% 8	44.00
Lambs	29.63% 8	22.22% 6	22.22% 6	29.63% 8	14.81% 4	33.33% 9	37.04% 10	29.63% 8	33.33% 9	48.15
Goats	50.00% 3	33.33% 2	16.67% 1	16.67% 1	33.33% 2	50.00% 3	66.67% 4	50.00% 3	66.67% 4	50.00
Chickens	9.09% 2	13.64% 3	13.64% 3	22.73% 5	54.55% 12	59.09% 13	59.09% 13	50.00% 11	54.55% 12	36.36
Other	22.22% 2	11.11% 1	22.22% 2	11.11% 1	22.22% 2	11.11% 1	44.44% 4	33.33% 3	22.22% 2	55.56

Q5 What are the factors that led to you choosing those target slaughter dates?

Answered: 67 Skipped: 0

#	RESPONSES	DATE
1	for the lambs it is when our pasture grass quits growing. for the pigs its before the heat really hits.	3/28/2023 6:09 PM
2	Grass fed, this is the best time for me and grass	3/27/2023 11:20 AM
3	Available Pasture for grazing	3/27/2023 8:52 AM
4	Have year around processing	3/25/2023 12:47 PM
5	Currently selling shares every 6-8 weeks.	3/25/2023 7:30 AM
6	Fresh forage end dates	3/24/2023 8:35 PM
7	ambient outdoor temps for on-site slaughter	3/24/2023 12:24 PM
8	Pasture growing season	3/24/2023 5:34 AM
9	Weather and breeding	3/23/2023 9:03 PM
10	Off season. Easy scheduling. We harvest year round but try to time our Harvest weights so that they hit outside the busy Slaughter season of fall	3/23/2023 7:56 PM
11	That when I feed them out.	3/23/2023 7:06 PM
12	Heading into winter, yearlings ready to slaughter	3/23/2023 5:01 PM
13	Before winter to save expense.	3/23/2023 4:45 PM
14	Farmers market dates	3/23/2023 4:30 PM
15	Time slaughter to grass availability	3/23/2023 3:21 PM
16	Weather, breeding schedule, forage availability	3/23/2023 3:06 PM
17	When cows are bred.	3/23/2023 12:40 PM
18	natural food sources and stock life cycle.	3/23/2023 12:38 PM
19	warm weather	3/23/2023 12:23 PM
20	Weather is better for raising chickens out on pasture	3/23/2023 12:04 PM
21	Stiers, health and tenderness	3/22/2023 3:17 PM
22	Fit me the best	3/22/2023 3:04 PM
23	Coordination with the start and end of our CSA	3/21/2023 5:22 PM
24	Fit best with our crop farming.	3/21/2023 2:01 PM
25	Piglets are most available in spring	3/21/2023 1:50 PM
26	Market demand	3/21/2023 11:22 AM
27	Grass/ graze timing, weather, flood- working my breeding cycle around all of this.	3/20/2023 6:54 PM
28	Age of steers and amount of pasture available	3/17/2023 12:56 PM
29	Date of birth	3/17/2023 11:11 AM
30	When the animals would be finished so I don't have to keep them in the barn and feed hay over winter. Also slaughter at other times depending on availability and demand	3/16/2023 9:08 AM

31	Other backup markets	3/15/2023 10:37 PM
32	We raise pigs seasonally, and sell beef all year.	3/15/2023 1:56 PM
33	Grass is going away at that time of year. Soils are getting squishy.	3/15/2023 10:15 AM
34	demand and available processing dates	3/15/2023 8:11 AM
35	sheep breeding season leading up to about a year for size, november is a good month to get pigs and sheep done before travel for holidays, customers want to to stock up on meat in the fall, we do our own chicken processing and it's according to the production season, if there were an alternative we would consider using it.	3/14/2023 7:26 PM
36	Thurston County Fair requirements for 4-H/FFA lambs. I didn’t want 2 breeding seasons.	3/14/2023 3:19 PM
37	Slow time and fits in with flock rotation	3/14/2023 2:02 PM
38	These aren't cast in stone. Lambs are responsive to various market needs, and also can follow Spring grazing before a move to cut hay. Turkeys are generally Thanksgiving specific	3/12/2023 11:29 AM
39	Lambs are greater than 6months old, before ewes are bred again by ram	3/11/2023 5:38 PM
40	Demand and type/age of animal desired. also based on rotation of calving dates.	3/11/2023 10:53 AM
41	2 head every other month	3/10/2023 8:32 PM
42	life	3/10/2023 8:20 PM
43	Calving and Lambing dates that lead to when they typically finish	3/10/2023 8:18 PM
44	Forage quality and customer demand	3/10/2023 7:05 PM
45	Availability, maturity of animal and access to feed	3/10/2023 3:58 PM
46	Dependent on dates of the Thurston County Fair.	3/10/2023 6:15 AM
47	Age and desired weight of animal. Also try to consider ethnic holidays.	3/10/2023 5:53 AM
48	weather	3/9/2023 2:30 PM
49	Demand	3/8/2023 8:27 PM
50	Pasture raised beef sales allow these dates to maximize pasture grass consumption without need for confinement feeding	3/8/2023 1:44 PM
51	Grass fed beef is best harvested while the cattle are putting on weight. 15-18 month old cattle are butchered while the grass growth is diminishing during the summer freeing up remaining grass for herd. Lambs need to be big enough to slaughter from Feb/March birthdates.	3/8/2023 8:07 AM
52	Grow out times based on birth	3/8/2023 7:27 AM
53	When stock are appropriately finished and processor availability	3/8/2023 12:02 AM
54	Weather and seasonal breeding	3/7/2023 10:15 PM
55	Huge demand	3/7/2023 2:15 PM
56	Spring and fall to meet customer needs	3/7/2023 2:08 PM
57	Availability of butcher shop and slaughter	3/7/2023 12:01 PM
58	patures dry up	3/7/2023 10:38 AM
59	holiday schedule, growth of animal	3/7/2023 8:11 AM
60	steady income revenue	3/6/2023 4:59 PM
61	weather and hanging weight	3/6/2023 3:47 PM
62	size and quantity of animals	3/6/2023 9:44 AM
63	Age of livestock	3/6/2023 8:33 AM
64	Grass growth	3/4/2023 1:12 PM

65	Personal schedule	3/4/2023 10:27 AM
66	Mostly seasonality	3/3/2023 9:58 PM
67	Need to offer my beef year around to provide customer product year around..	3/3/2023 10:55 AM

Q6 What was your slaughter count in 2021?Fill in slaughter counts for all that apply.

Answered: 67 Skipped: 0

ANSWER CHOICES	RESPONSES	
Cows	68.66%	46
Pigs	40.30%	27
Lambs	37.31%	25
Goats	10.45%	7
Chickens	34.33%	23
Other (please specify type of animal)	14.93%	10

#	COWS	DATE
1	6	3/27/2023 11:20 AM
2	4	3/27/2023 8:52 AM
3	200	3/25/2023 12:47 PM
4	35	3/25/2023 7:30 AM
5	5	3/24/2023 8:35 PM
6	on site only	3/24/2023 12:24 PM
7	20	3/24/2023 5:34 AM
8	0	3/23/2023 9:03 PM
9	4	3/23/2023 7:56 PM
10	6	3/23/2023 7:06 PM
11	0	3/23/2023 4:45 PM
12	2	3/23/2023 3:21 PM
13	3	3/23/2023 3:06 PM
14	2	3/23/2023 12:40 PM
15	20 steers	3/22/2023 3:17 PM
16	6	3/22/2023 3:04 PM
17	12	3/21/2023 2:01 PM
18	4	3/17/2023 12:56 PM
19	3	3/17/2023 11:11 AM
20	1	3/16/2023 9:08 AM
21	10	3/15/2023 10:37 PM
22	100	3/15/2023 1:56 PM
23	2	3/15/2023 10:15 AM
24	0	3/15/2023 8:11 AM

25	2	3/14/2023 3:19 PM
26	0	3/14/2023 2:02 PM
27	1	3/11/2023 10:53 AM
28	8	3/10/2023 8:32 PM
29	5	3/10/2023 8:18 PM
30	0	3/10/2023 7:05 PM
31	6	3/10/2023 6:15 AM
32	7	3/9/2023 2:30 PM
33	60	3/8/2023 8:27 PM
34	35	3/8/2023 1:44 PM
35	5	3/8/2023 8:07 AM
36	3	3/8/2023 7:27 AM
37	6	3/8/2023 12:02 AM
38	5	3/7/2023 2:15 PM
39	6	3/7/2023 2:08 PM
40	2	3/7/2023 12:01 PM
41	3	3/7/2023 10:38 AM
42	15	3/6/2023 4:59 PM
43	2	3/6/2023 9:44 AM
44	0	3/6/2023 8:33 AM
45	9	3/4/2023 1:12 PM
46	46	3/3/2023 10:55 AM
#	**PIGS**	**DATE**
1	2	3/28/2023 6:09 PM
2	2	3/27/2023 8:52 AM
3	50	3/25/2023 12:47 PM
4	30	3/25/2023 7:30 AM
5	24	3/24/2023 5:34 AM
6	6	3/23/2023 9:03 PM
7	22	3/23/2023 7:56 PM
8	30	3/23/2023 4:30 PM
9	5	3/23/2023 3:06 PM
10	4	3/23/2023 12:38 PM
11	16	3/22/2023 3:04 PM
12	40	3/21/2023 2:01 PM
13	3	3/21/2023 1:50 PM
14	10	3/16/2023 9:08 AM
15	10	3/15/2023 10:37 PM

16	50	3/15/2023 1:56 PM
17	12	3/14/2023 7:26 PM
18	15	3/14/2023 3:19 PM
19	0	3/14/2023 2:02 PM
20	1	3/11/2023 10:53 AM
21	0	3/10/2023 7:05 PM
22	10	3/10/2023 6:15 AM
23	60	3/8/2023 8:27 PM
24	7	3/8/2023 7:27 AM
25	6	3/8/2023 12:02 AM
26	8	3/4/2023 1:12 PM
27	40	3/3/2023 9:58 PM
#	**LAMBS**	**DATE**
1	4	3/28/2023 6:09 PM
2	45	3/25/2023 12:47 PM
3	3	3/24/2023 8:35 PM
4	20	3/23/2023 7:56 PM
5	15	3/23/2023 5:01 PM
6	10	3/23/2023 12:38 PM
7	25	3/22/2023 3:04 PM
8	0	3/21/2023 11:22 AM
9	27	3/20/2023 6:54 PM
10	30	3/16/2023 9:08 AM
11	8	3/15/2023 10:15 AM
12	30	3/14/2023 7:26 PM
13	10	3/14/2023 3:19 PM
14	0	3/14/2023 2:02 PM
15	6	3/12/2023 11:29 AM
16	6	3/11/2023 5:38 PM
17	15	3/10/2023 8:18 PM
18	0	3/10/2023 7:05 PM
19	10	3/10/2023 3:58 PM
20	20	3/10/2023 6:15 AM
21	15	3/8/2023 8:27 PM
22	0	3/8/2023 8:07 AM
23	5	3/7/2023 8:11 AM
24	3	3/6/2023 3:47 PM
25	20	3/3/2023 9:58 PM

#	GOATS	DATE
1	10	3/25/2023 12:47 PM
2	25	3/23/2023 3:21 PM
3	0	3/14/2023 2:02 PM
4	0	3/10/2023 7:05 PM
5	5	3/10/2023 6:15 AM
6	0	3/10/2023 5:53 AM
7	9	3/8/2023 7:27 AM

#	CHICKENS	DATE
1	0	3/27/2023 11:20 AM
2	5	3/27/2023 8:52 AM
3	50	3/25/2023 12:47 PM
4	500	3/24/2023 5:34 AM
5	250	3/23/2023 9:03 PM
6	0	3/23/2023 4:45 PM
7	50	3/23/2023 3:06 PM
8	150	3/23/2023 12:38 PM
9	10	3/23/2023 12:23 PM
10	300	3/23/2023 12:04 PM
11	100	3/21/2023 5:22 PM
12	30	3/15/2023 10:37 PM
13	9000	3/14/2023 7:26 PM
14	0	3/14/2023 2:02 PM
15	25	3/12/2023 11:29 AM
16	50	3/11/2023 10:53 AM
17	105	3/10/2023 7:05 PM
18	100	3/8/2023 7:27 AM
19	22	3/7/2023 10:15 PM
20	10	3/6/2023 3:47 PM
21	400	3/4/2023 1:12 PM
22	400	3/4/2023 10:27 AM
23	2400	3/3/2023 9:58 PM

#	OTHER (PLEASE SPECIFY TYPE OF ANIMAL)	DATE
1	on site only	3/24/2023 12:24 PM
2	15 Turkeys	3/21/2023 5:22 PM
3	Ducks - 40	3/21/2023 1:50 PM
4	95	3/15/2023 8:11 AM
5	0	3/14/2023 2:02 PM
6	25 Turkeys	3/12/2023 11:29 AM

7	.	3/10/2023 8:20 PM
8	6 rabbits	3/10/2023 6:15 AM
9	45	3/4/2023 10:27 AM
10	300 turkey	3/3/2023 9:58 PM

Q7 What was your slaughter count in 2022?Fill in slaughter counts for all that apply.

Answered: 67 Skipped: 0

ANSWER CHOICES	RESPONSES	
Cows	67.16%	45
Pigs	38.81%	26
Lambs	41.79%	28
Goats	11.94%	8
Chickens	31.34%	21
Other (please specify type of animal)	16.42%	11

#	COWS	DATE
1	6	3/27/2023 11:20 AM
2	2	3/27/2023 8:52 AM
3	100	3/25/2023 12:47 PM
4	40	3/25/2023 7:30 AM
5	6	3/24/2023 8:35 PM
6	on site only	3/24/2023 12:24 PM
7	15	3/24/2023 5:34 AM
8	0	3/23/2023 9:03 PM
9	4	3/23/2023 7:56 PM
10	6	3/23/2023 7:06 PM
11	0	3/23/2023 4:45 PM
12	8	3/23/2023 3:21 PM
13	4	3/23/2023 3:06 PM
14	0	3/23/2023 12:40 PM
15	Steers 21	3/22/2023 3:17 PM
16	6	3/22/2023 3:04 PM
17	15	3/21/2023 2:01 PM
18	4	3/17/2023 12:56 PM
19	3	3/17/2023 11:11 AM
20	1	3/16/2023 9:08 AM
21	15	3/15/2023 10:37 PM
22	110	3/15/2023 1:56 PM
23	0	3/15/2023 10:15 AM
24	18	3/15/2023 8:11 AM

25	0	3/14/2023 2:02 PM
26	1	3/11/2023 10:53 AM
27	10	3/10/2023 8:32 PM
28	5	3/10/2023 8:18 PM
29	0	3/10/2023 7:05 PM
30	8	3/10/2023 6:15 AM
31	8	3/9/2023 2:30 PM
32	80	3/8/2023 8:27 PM
33	40	3/8/2023 1:44 PM
34	9	3/8/2023 8:07 AM
35	3	3/8/2023 7:27 AM
36	4	3/8/2023 12:02 AM
37	5	3/7/2023 2:08 PM
38	2	3/7/2023 12:01 PM
39	2	3/7/2023 10:38 AM
40	30	3/6/2023 4:59 PM
41	1	3/6/2023 9:44 AM
42	3	3/6/2023 8:33 AM
43	11	3/4/2023 1:12 PM
44	4	3/3/2023 9:58 PM
45	46	3/3/2023 10:55 AM
#	**PIGS**	**DATE**
1	2	3/28/2023 6:09 PM
2	0	3/27/2023 8:52 AM
3	50	3/25/2023 12:47 PM
4	35	3/25/2023 7:30 AM
5	14	3/24/2023 5:34 AM
6	6	3/23/2023 9:03 PM
7	16	3/23/2023 7:56 PM
8	25	3/23/2023 4:30 PM
9	8	3/23/2023 3:06 PM
10	0	3/23/2023 12:38 PM
11	16	3/22/2023 3:04 PM
12	50	3/21/2023 2:01 PM
13	3	3/21/2023 1:50 PM
14	10	3/16/2023 9:08 AM
15	12	3/15/2023 10:37 PM
16	50	3/15/2023 1:56 PM

17	12	3/14/2023 7:26 PM
18	0	3/14/2023 2:02 PM
19	0	3/10/2023 7:05 PM
20	15	3/10/2023 6:15 AM
21	60	3/8/2023 8:27 PM
22	6	3/8/2023 7:27 AM
23	6	3/8/2023 12:02 AM
24	3	3/7/2023 10:15 PM
25	10	3/4/2023 1:12 PM
26	20	3/3/2023 9:58 PM
#	**LAMBS**	**DATE**
1	5	3/28/2023 6:09 PM
2	40	3/25/2023 12:47 PM
3	3	3/24/2023 8:35 PM
4	6	3/24/2023 5:34 AM
5	14	3/23/2023 7:56 PM
6	15	3/23/2023 5:01 PM
7	15	3/23/2023 12:38 PM
8	25	3/22/2023 3:04 PM
9	12	3/21/2023 11:22 AM
10	37	3/20/2023 6:54 PM
11	30	3/16/2023 9:08 AM
12	8	3/15/2023 10:15 AM
13	30	3/14/2023 7:26 PM
14	6	3/14/2023 3:19 PM
15	0	3/14/2023 2:02 PM
16	7	3/12/2023 11:29 AM
17	7	3/11/2023 5:38 PM
18	20	3/10/2023 8:18 PM
19	0	3/10/2023 7:05 PM
20	15	3/10/2023 3:58 PM
21	20	3/10/2023 6:15 AM
22	10	3/8/2023 8:27 PM
23	0	3/8/2023 8:07 AM
24	2	3/7/2023 10:15 PM
25	50	3/7/2023 2:15 PM
26	6	3/7/2023 8:11 AM
27	2	3/6/2023 3:47 PM

28	10	3/3/2023 9:58 PM
#	GOATS	DATE
1	20	3/25/2023 12:47 PM
2	20	3/23/2023 3:21 PM
3	0	3/14/2023 2:02 PM
4	0	3/10/2023 7:05 PM
5	5	3/10/2023 6:15 AM
6	0	3/10/2023 5:53 AM
7	4	3/8/2023 7:27 AM
8	10	3/7/2023 2:15 PM
#	CHICKENS	DATE
1	5	3/27/2023 8:52 AM
2	25	3/25/2023 12:47 PM
3	550	3/24/2023 5:34 AM
4	350	3/23/2023 9:03 PM
5	0	3/23/2023 4:45 PM
6	150	3/23/2023 12:38 PM
7	10	3/23/2023 12:23 PM
8	2000	3/23/2023 12:04 PM
9	75	3/21/2023 5:22 PM
10	30	3/15/2023 10:37 PM
11	9000	3/14/2023 7:26 PM
12	0	3/14/2023 2:02 PM
13	50	3/11/2023 10:53 AM
14	0	3/10/2023 7:05 PM
15	75	3/10/2023 3:58 PM
16	100	3/8/2023 7:27 AM
17	25	3/7/2023 10:15 PM
18	25	3/6/2023 3:47 PM
19	300	3/4/2023 1:12 PM
20	400	3/4/2023 10:27 AM
21	2400	3/3/2023 9:58 PM
#	OTHER (PLEASE SPECIFY TYPE OF ANIMAL)	DATE
1	on site only (state law prohibits transport live)	3/24/2023 12:24 PM
2	Ducks - 300	3/23/2023 12:04 PM
3	13Turkeys	3/21/2023 5:22 PM
4	Ducks - 50	3/21/2023 1:50 PM
5	105	3/15/2023 8:11 AM
6	0	3/14/2023 2:02 PM

7	25 turkeys	3/12/2023 11:29 AM
8	.	3/10/2023 8:20 PM
9	3 rabbits	3/10/2023 6:15 AM
10	50	3/4/2023 10:27 AM
11	400 turkey	3/3/2023 9:58 PM

Q8 What is your projected slaughter count in 2023?Fill in slaughter counts for all that apply.

Answered: 67 Skipped: 0

ANSWER CHOICES	RESPONSES	
Cows	67.16%	45
Pigs	41.79%	28
Lambs	43.28%	29
Goats	10.45%	7
Chickens	34.33%	23
Other (please specify type of animal)	14.93%	10

#	COWS	DATE
1	0	3/27/2023 11:20 AM
2	2	3/27/2023 8:52 AM
3	200	3/25/2023 12:47 PM
4	40	3/25/2023 7:30 AM
5	5	3/24/2023 8:35 PM
6	0	3/24/2023 12:24 PM
7	15	3/24/2023 5:34 AM
8	3	3/23/2023 9:03 PM
9	4	3/23/2023 7:56 PM
10	6	3/23/2023 7:06 PM
11	1	3/23/2023 4:45 PM
12	8	3/23/2023 3:21 PM
13	5	3/23/2023 3:06 PM
14	3	3/23/2023 12:40 PM
15	Steers 20-25	3/22/2023 3:17 PM
16	9	3/22/2023 3:04 PM
17	20	3/21/2023 2:01 PM
18	4	3/17/2023 12:56 PM
19	3	3/17/2023 11:11 AM
20	15	3/15/2023 10:37 PM
21	125	3/15/2023 1:56 PM
22	0	3/15/2023 10:15 AM
23	24	3/15/2023 8:11 AM
24	0	3/14/2023 2:02 PM

25	1	3/11/2023 10:53 AM
26	10	3/10/2023 8:32 PM
27	10	3/10/2023 8:18 PM
28	4	3/10/2023 7:05 PM
29	15	3/10/2023 6:15 AM
30	10	3/9/2023 2:30 PM
31	90+	3/8/2023 8:27 PM
32	45	3/8/2023 1:44 PM
33	15	3/8/2023 8:07 AM
34	3	3/8/2023 7:27 AM
35	4	3/8/2023 12:02 AM
36	20	3/7/2023 2:15 PM
37	3	3/7/2023 2:08 PM
38	2	3/7/2023 12:01 PM
39	2	3/7/2023 10:38 AM
40	40	3/6/2023 4:59 PM
41	2	3/6/2023 9:44 AM
42	5	3/6/2023 8:33 AM
43	8	3/4/2023 1:12 PM
44	4	3/3/2023 9:58 PM
45	43	3/3/2023 10:55 AM
#	**PIGS**	**DATE**
1	2	3/28/2023 6:09 PM
2	2	3/27/2023 8:52 AM
3	50	3/25/2023 12:47 PM
4	30	3/25/2023 7:30 AM
5	30	3/24/2023 5:34 AM
6	8	3/23/2023 9:03 PM
7	24	3/23/2023 7:56 PM
8	26	3/23/2023 4:30 PM
9	10	3/23/2023 3:06 PM
10	2	3/23/2023 12:38 PM
11	4	3/23/2023 12:04 PM
12	16	3/22/2023 3:04 PM
13	40	3/21/2023 2:01 PM
14	8	3/21/2023 1:50 PM
15	10	3/16/2023 9:08 AM
16	15	3/15/2023 10:37 PM

17	50	3/15/2023 1:56 PM
18	12	3/14/2023 7:26 PM
19	0	3/14/2023 2:02 PM
20	1	3/11/2023 10:53 AM
21	40	3/10/2023 7:05 PM
22	25	3/10/2023 6:15 AM
23	70	3/8/2023 8:27 PM
24	5	3/8/2023 7:27 AM
25	6	3/8/2023 12:02 AM
26	1	3/7/2023 10:15 PM
27	10	3/4/2023 1:12 PM
28	20	3/3/2023 9:58 PM
#	**LAMBS**	**DATE**
1	5	3/28/2023 6:09 PM
2	45	3/25/2023 12:47 PM
3	3	3/24/2023 8:35 PM
4	6	3/24/2023 5:34 AM
5	30	3/23/2023 7:56 PM
6	20	3/23/2023 5:01 PM
7	0	3/23/2023 12:38 PM
8	2	3/23/2023 12:04 PM
9	25	3/22/2023 3:04 PM
10	20	3/21/2023 11:22 AM
11	45	3/20/2023 6:54 PM
12	30	3/16/2023 9:08 AM
13	7	3/15/2023 10:15 AM
14	40	3/14/2023 7:26 PM
15	15	3/14/2023 3:19 PM
16	0	3/14/2023 2:02 PM
17	7	3/12/2023 11:29 AM
18	~5-8	3/11/2023 5:38 PM
19	25	3/10/2023 8:18 PM
20	10	3/10/2023 7:05 PM
21	15	3/10/2023 3:58 PM
22	30	3/10/2023 6:15 AM
23	15	3/8/2023 8:27 PM
24	12	3/8/2023 8:07 AM
25	2	3/7/2023 10:15 PM

26	100	3/7/2023 2:15 PM
27	15	3/7/2023 8:11 AM
28	8	3/6/2023 3:47 PM
29	10	3/3/2023 9:58 PM
#	**GOATS**	**DATE**
1	10	3/25/2023 12:47 PM
2	10	3/23/2023 3:21 PM
3	0	3/14/2023 2:02 PM
4	10	3/10/2023 6:15 AM
5	10	3/10/2023 5:53 AM
6	3-5	3/8/2023 7:27 AM
7	20	3/7/2023 2:15 PM
#	**CHICKENS**	**DATE**
1	5	3/27/2023 8:52 AM
2	50	3/25/2023 12:47 PM
3	550	3/24/2023 5:34 AM
4	400	3/23/2023 9:03 PM
5	30	3/23/2023 7:56 PM
6	10	3/23/2023 4:45 PM
7	200	3/23/2023 12:38 PM
8	15	3/23/2023 12:23 PM
9	3700	3/23/2023 12:04 PM
10	100	3/21/2023 5:22 PM
11	60	3/15/2023 10:37 PM
12	9000	3/14/2023 7:26 PM
13	0	3/14/2023 2:02 PM
14	30	3/12/2023 11:29 AM
15	50	3/11/2023 10:53 AM
16	60	3/10/2023 8:20 PM
17	75	3/10/2023 3:58 PM
18	100-150	3/8/2023 7:27 AM
19	30	3/7/2023 10:15 PM
20	20	3/6/2023 3:47 PM
21	300	3/4/2023 1:12 PM
22	400	3/4/2023 10:27 AM
23	2000	3/3/2023 9:58 PM
#	**OTHER (PLEASE SPECIFY TYPE OF ANIMAL)**	**DATE**
1	see other notes	3/24/2023 12:24 PM
2	Ducks 14	3/23/2023 7:56 PM

3	25 Turkeys	3/21/2023 5:22 PM
4	110	3/15/2023 8:11 AM
5	0	3/14/2023 2:02 PM
6	25 turkeys	3/12/2023 11:29 AM
7	Will retire older ewes this year: 3-4	3/11/2023 5:38 PM
8	9 rabbits	3/10/2023 6:15 AM
9	55	3/4/2023 10:27 AM
10	400 turkey	3/3/2023 9:58 PM

Q9 What is your projected slaughter count in 2024?Fill in slaughter counts for all that apply.

Answered: 67 Skipped: 0

ANSWER CHOICES	RESPONSES	
Cows	68.66%	46
Pigs	38.81%	26
Lambs	41.79%	28
Goats	10.45%	7
Chickens	32.84%	22
Other (please specify type of animal)	14.93%	10

#	COWS	DATE
1	4	3/27/2023 11:20 AM
2	2	3/27/2023 8:52 AM
3	300	3/25/2023 12:47 PM
4	40	3/25/2023 7:30 AM
5	5	3/24/2023 8:35 PM
6	0	3/24/2023 12:24 PM
7	20	3/24/2023 5:34 AM
8	2	3/23/2023 9:03 PM
9	16	3/23/2023 7:56 PM
10	4	3/23/2023 7:06 PM
11	?	3/23/2023 4:45 PM
12	10	3/23/2023 3:21 PM
13	?	3/23/2023 3:06 PM
14	2	3/23/2023 12:40 PM
15	Steers 20-25	3/22/2023 3:17 PM
16	9	3/22/2023 3:04 PM
17	25	3/21/2023 2:01 PM
18	4	3/17/2023 12:56 PM
19	3	3/17/2023 11:11 AM
20	10	3/16/2023 9:08 AM
21	20	3/15/2023 10:37 PM
22	150	3/15/2023 1:56 PM
23	0	3/15/2023 10:15 AM
24	24	3/15/2023 8:11 AM

25	0	3/14/2023 2:02 PM
26	1	3/11/2023 10:53 AM
27	12	3/10/2023 8:32 PM
28	15	3/10/2023 8:18 PM
29	10	3/10/2023 7:05 PM
30	15	3/10/2023 6:15 AM
31	8	3/9/2023 2:30 PM
32	100	3/8/2023 8:27 PM
33	55	3/8/2023 1:44 PM
34	20	3/8/2023 8:07 AM
35	4	3/8/2023 7:27 AM
36	6	3/8/2023 12:02 AM
37	30	3/7/2023 2:15 PM
38	5	3/7/2023 2:08 PM
39	2	3/7/2023 12:01 PM
40	2	3/7/2023 10:38 AM
41	50	3/6/2023 4:59 PM
42	2	3/6/2023 9:44 AM
43	8	3/6/2023 8:33 AM
44	10	3/4/2023 1:12 PM
45	4	3/3/2023 9:58 PM
46	43	3/3/2023 10:55 AM
#	**PIGS**	**DATE**
1	2	3/28/2023 6:09 PM
2	2	3/27/2023 8:52 AM
3	50	3/25/2023 12:47 PM
4	30	3/25/2023 7:30 AM
5	30	3/24/2023 5:34 AM
6	8	3/23/2023 9:03 PM
7	50	3/23/2023 7:56 PM
8	Not sure yet.	3/23/2023 4:30 PM
9	4	3/23/2023 12:38 PM
10	10	3/23/2023 12:04 PM
11	16	3/22/2023 3:04 PM
12	40	3/21/2023 2:01 PM
13	8	3/21/2023 1:50 PM
14	15	3/16/2023 9:08 AM
15	15	3/15/2023 10:37 PM

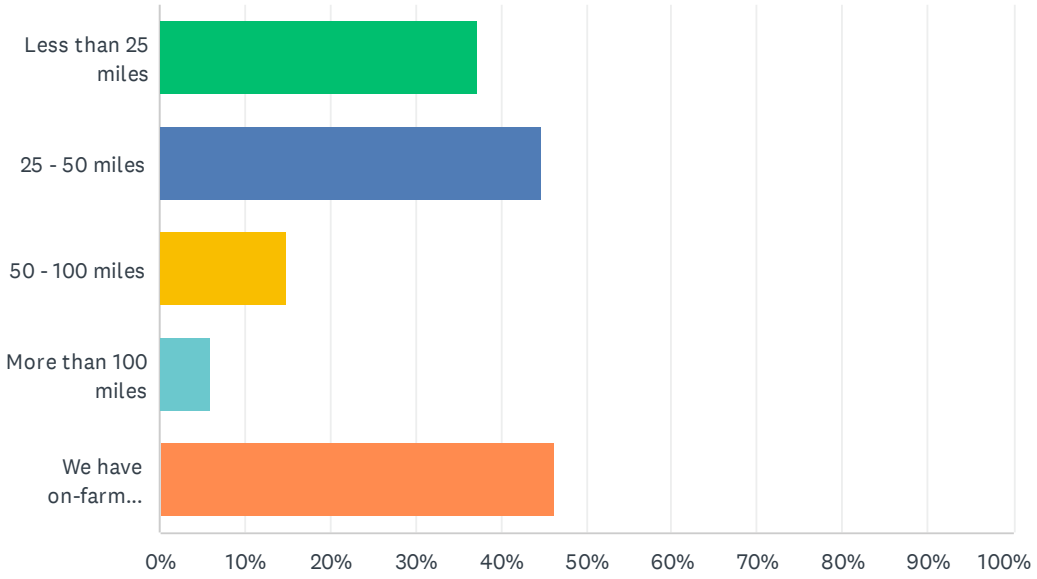
16	50	3/15/2023 1:56 PM
17	20	3/14/2023 7:26 PM
18	0	3/14/2023 2:02 PM
19	1	3/11/2023 10:53 AM
20	20	3/10/2023 7:05 PM
21	25	3/10/2023 6:15 AM
22	70	3/8/2023 8:27 PM
23	5-8	3/8/2023 7:27 AM
24	8	3/8/2023 12:02 AM
25	3	3/7/2023 10:15 PM
26	10	3/4/2023 1:12 PM
#	**LAMBS**	**DATE**
1	5	3/28/2023 6:09 PM
2	45	3/25/2023 12:47 PM
3	4	3/24/2023 8:35 PM
4	10	3/24/2023 5:34 AM
5	40	3/23/2023 7:56 PM
6	15	3/23/2023 5:01 PM
7	12	3/23/2023 12:38 PM
8	10	3/23/2023 12:04 PM
9	25	3/22/2023 3:04 PM
10	30	3/21/2023 11:22 AM
11	50	3/20/2023 6:54 PM
12	35	3/16/2023 9:08 AM
13	4	3/15/2023 10:15 AM
14	40	3/14/2023 7:26 PM
15	15	3/14/2023 3:19 PM
16	0	3/14/2023 2:02 PM
17	6	3/12/2023 11:29 AM
18	5-8	3/11/2023 5:38 PM
19	30	3/10/2023 8:18 PM
20	20	3/10/2023 7:05 PM
21	15	3/10/2023 3:58 PM
22	30	3/10/2023 6:15 AM
23	15	3/8/2023 8:27 PM
24	15	3/8/2023 8:07 AM
25	6	3/7/2023 10:15 PM
26	150	3/7/2023 2:15 PM

27	10	3/7/2023 8:11 AM
28	10	3/6/2023 3:47 PM
#	**GOATS**	**DATE**
1	10	3/25/2023 12:47 PM
2	20	3/23/2023 3:21 PM
3	2	3/21/2023 1:50 PM
4	0	3/14/2023 2:02 PM
5	10	3/10/2023 6:15 AM
6	10	3/10/2023 5:53 AM
7	5	3/8/2023 7:27 AM
#	**CHICKENS**	**DATE**
1	5	3/27/2023 8:52 AM
2	70	3/25/2023 12:47 PM
3	600	3/24/2023 5:34 AM
4	400	3/23/2023 9:03 PM
5	80	3/23/2023 7:56 PM
6	?	3/23/2023 4:45 PM
7	150	3/23/2023 12:38 PM
8	18	3/23/2023 12:23 PM
9	6000	3/23/2023 12:04 PM
10	100	3/21/2023 5:22 PM
11	60	3/15/2023 10:37 PM
12	10000	3/14/2023 7:26 PM
13	0	3/14/2023 2:02 PM
14	30	3/12/2023 11:29 AM
15	50	3/11/2023 10:53 AM
16	300	3/10/2023 8:20 PM
17	200	3/8/2023 7:27 AM
18	40	3/7/2023 10:15 PM
19	20	3/6/2023 3:47 PM
20	400/600	3/4/2023 1:12 PM
21	400	3/4/2023 10:27 AM
22	4000	3/3/2023 9:58 PM
#	**OTHER (PLEASE SPECIFY TYPE OF ANIMAL)**	**DATE**
1	see other notes	3/24/2023 12:24 PM
2	Ducks 40	3/23/2023 7:56 PM
3	25 Turkeys	3/21/2023 5:22 PM
4	Ducks - 15	3/21/2023 1:50 PM
5	115	3/15/2023 8:11 AM

6	0	3/14/2023 2:02 PM
7	25 turkeys	3/12/2023 11:29 AM
8	9 rabbits	3/10/2023 6:15 AM
9	55	3/4/2023 10:27 AM
10	400 turkey	3/3/2023 9:58 PM

Q10 How far are you willing to transport animals for slaughter and/or processing?Check all that apply.

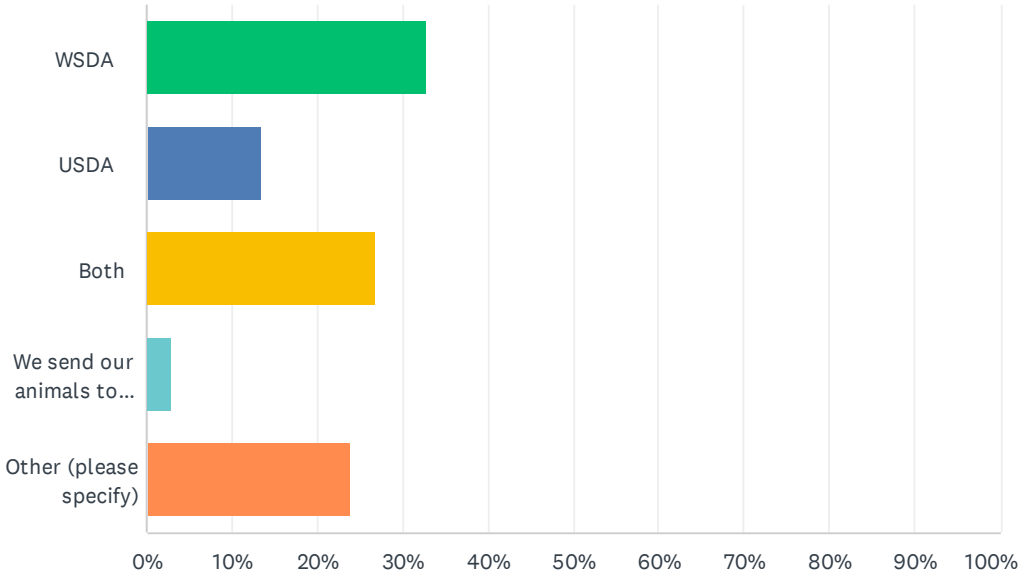
Answered: 67 Skipped: 0



ANSWER CHOICES	RESPONSES	
Less than 25 miles	37.31%	25
25 - 50 miles	44.78%	30
50 - 100 miles	14.93%	10
More than 100 miles	5.97%	4
We have on-farm slaughterSelf-slaughter or mobile unit	46.27%	31
Total Respondents: 67		

Q11 Do you use WSDA or USDA slaughter and processing facilities/services?

Answered: 67 Skipped: 0



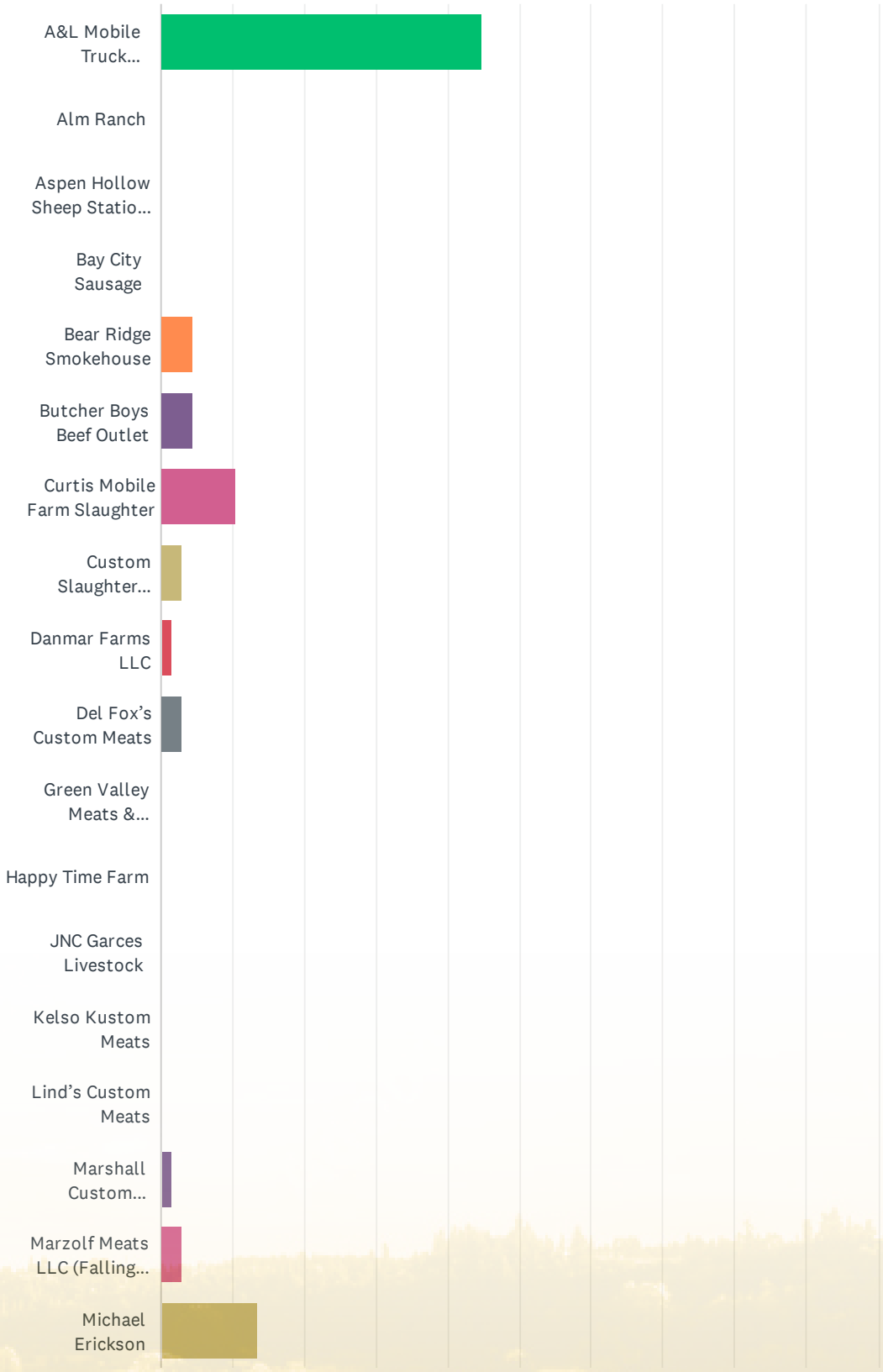
ANSWER CHOICES	RESPONSES	
WSDA	32.84%	22
USDA	13.43%	9
Both	26.87%	18
We send our animals to auction	2.99%	2
Other (please specify)	23.88%	16
TOTAL		67

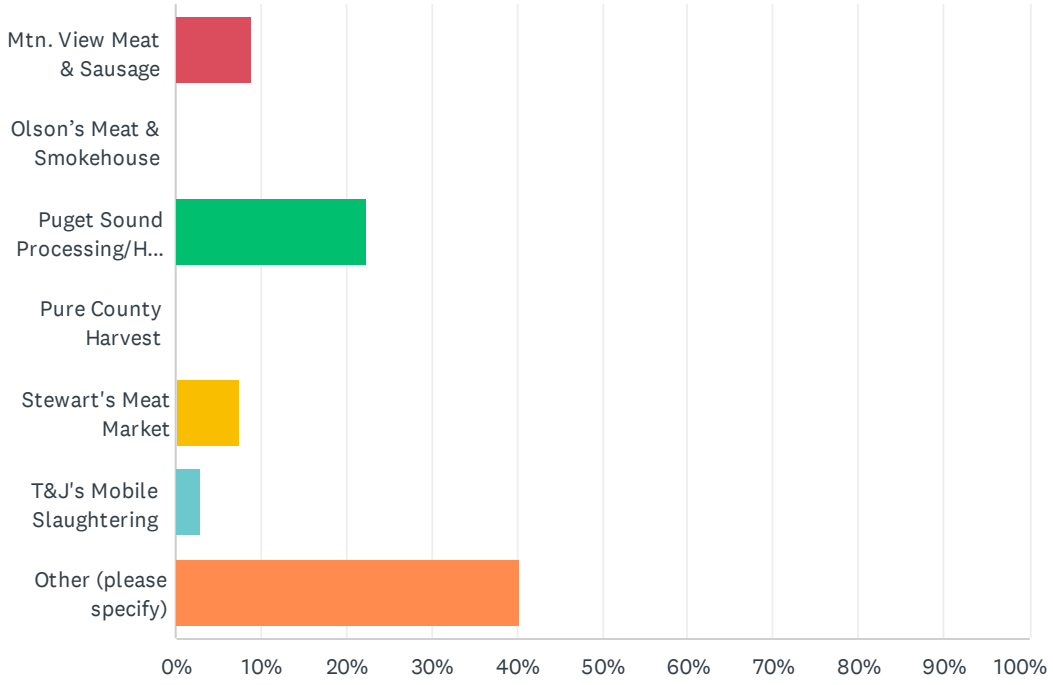
#	OTHER (PLEASE SPECIFY)	DATE
1	Custom slaughter and cut and wrap, not for sale	3/27/2023 11:20 AM
2	Home meats or wynochee	3/24/2023 8:35 PM
3	exclusive on farm	3/24/2023 12:24 PM
4	Self slaughter	3/23/2023 4:45 PM
5	Would like to (was hopeful about 10 years ago when project was initiated to have on-farm USDA slaughter mobile truck for home producers - but this never came to fruition). We have difficulty just breaking even as it is on meat - USDA would take us out of the market economically.	3/23/2023 12:40 PM
6	self	3/23/2023 12:23 PM
7	All of them.	3/21/2023 2:01 PM
8	WSDA currently, but we really want USDA pork processing	3/21/2023 1:50 PM

9	Haven't started yet. 1st slaughter of chickens will be in 2025.	3/14/2023 2:02 PM
10	For humane animal welfare designation and certification (A Greener World) We are required to slaughter on farm. Processing is always USDA	3/12/2023 11:29 AM
11	Could not get a date for slaughter service this year or last. I butchered on farm and did not sell any meat	3/11/2023 5:38 PM
12	Starting out	3/10/2023 8:20 PM
13	Buyer dependent	3/10/2023 5:53 AM
14	We use WSDA and send to auction	3/7/2023 2:08 PM
15	private	3/7/2023 12:01 PM
16	Personal equipment	3/4/2023 10:27 AM

Q12 What slaughtering facilities or services do you use?Check all that apply.

Answered: 67 Skipped: 0




Mtn. View Meat & Sausage
Olson's Meat & Smokehouse
Puget Sound Processing/H...
Pure County Harvest
Stewart's Meat Market
T&J's Mobile Slaughtering
Other (please specify)
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%

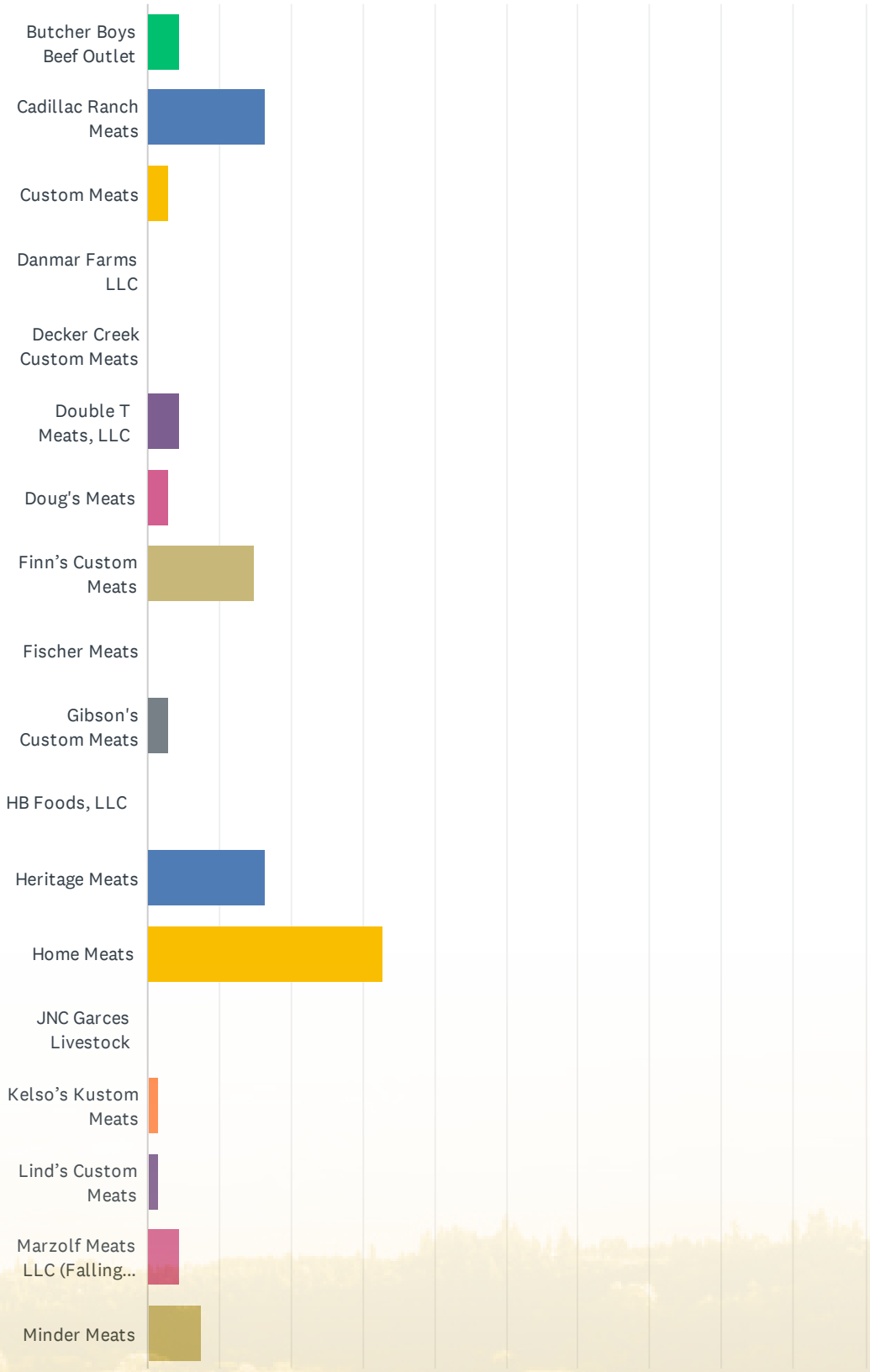
ANSWER CHOICES	RESPONSES	
A&L Mobile Truck Slaughtering	44.78%	30
Alm Ranch	0.00%	0
Aspen Hollow Sheep Station Mobile Harvest Unit	0.00%	0
Bay City Sausage	0.00%	0
Bear Ridge Smokehouse	4.48%	3
Butcher Boys Beef Outlet	4.48%	3
Curtis Mobile Farm Slaughter	10.45%	7
Custom Slaughter (Sodden family)	2.99%	2
Danmar Farms LLC	1.49%	1
Del Fox's Custom Meats	2.99%	2
Green Valley Meats & Mini-Market	0.00%	0
Happy Time Farm	0.00%	0
JNC Garces Livestock	0.00%	0
Kelso Kustom Meats	0.00%	0
Lind's Custom Meats	0.00%	0
Marshall Custom Slaughter	1.49%	1
Marzolf Meats LLC (Falling River Meats)	2.99%	2
Michael Erickson	13.43%	9
Mtn. View Meat & Sausage	8.96%	6
Olson's Meat & Smokehouse	0.00%	0
Puget Sound Processing/Heritage Meats	22.39%	15
Pure County Harvest	0.00%	0
Stewart's Meat Market	7.46%	5
T&J's Mobile Slaughtering	2.99%	2
Other (please specify)	40.30%	27
Total Respondents: 67		

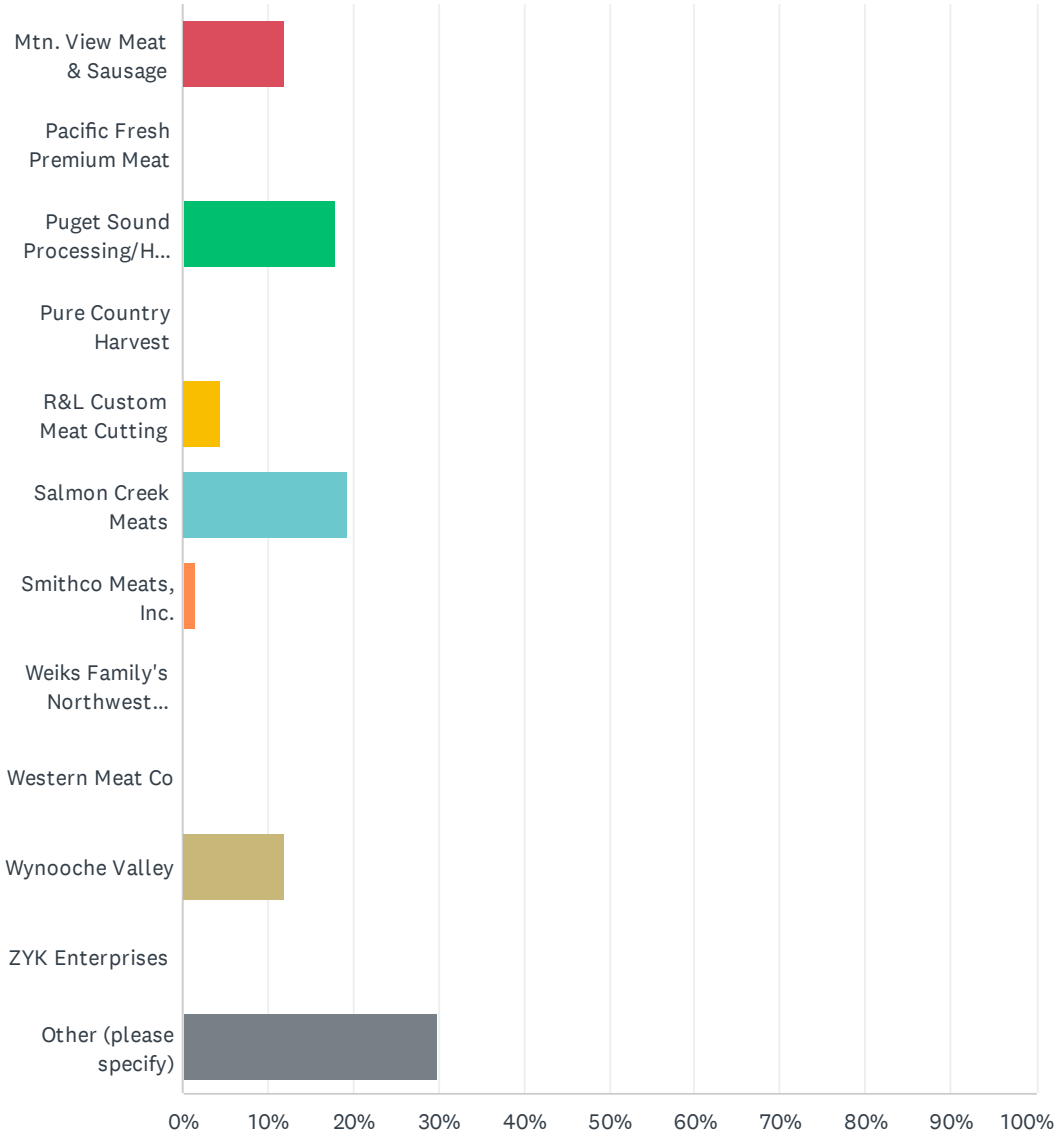
#	OTHER (PLEASE SPECIFY)	DATE
1	Cadillac Meats	3/25/2023 12:47 PM
2	self sufficient and we will stay that way	3/24/2023 12:24 PM
3	Farmer George	3/24/2023 5:34 AM
4	Farmer George Meats	3/23/2023 9:03 PM
5	Revel Meats in Oregon	3/23/2023 7:56 PM
6	Myself	3/23/2023 7:06 PM

7	Home meat Service	3/23/2023 4:45 PM
8	Peninsula Harvest mobile slaughter	3/23/2023 3:21 PM
9	Used Home Meats in 2021 - terrible experience. Tried reporting to WSDOA but process too convoluted - complaint never was processed. Have also used Wynoochee Meats couple of times: last time they mixed our order up - we think with someone else's and pick-up resulted in meat starting to thaw. Will never use again: Wynoochee, Home,	3/23/2023 12:40 PM
10	self	3/23/2023 12:23 PM
11	For chickens we rent facility at G&H Pastured Poultry	3/23/2023 12:04 PM
12	Home town meats	3/22/2023 3:17 PM
13	Salmon Creek Meats (Morton, WA)	3/21/2023 5:22 PM
14	Used Carnation Farms before they closed. Sometimes used Simple Plan Farms. Tried Marzolf and had a very bad experience.	3/21/2023 1:50 PM
15	Home Meat Service and Limit Bid Packing	3/15/2023 10:37 PM
16	Home Meats, Cadillac Ranch	3/15/2023 8:11 AM
17	none until 2025	3/14/2023 2:02 PM
18	Home meats is in kamilche, usually booked out during the season I'd like	3/11/2023 5:38 PM
19	Thurston Conservation District poultry trailer	3/10/2023 8:20 PM
20	Self	3/10/2023 8:18 PM
21	DanMar is a buyer of 'turned' sheep and lambs. Rabbits buyers are responsible for their own processing arrangements.	3/10/2023 6:15 AM
22	Havn't processed anything yet, still an early producer	3/10/2023 5:53 AM
23	Home Meats and Wynochee Meats killed onsite	3/8/2023 1:44 PM
24	Risleys mobile slaughter	3/8/2023 7:27 AM
25	Cadillac Meats	3/8/2023 12:02 AM
26	Home meats	3/7/2023 2:15 PM
27	Done by us	3/4/2023 10:27 AM

Q13 What processing facilities or services do you use?Check all that apply.

Answered: 67 Skipped: 0




Mtn. View Meat & Sausage
Pacific Fresh Premium Meat
Puget Sound Processing/H...
Pure Country Harvest
R&L Custom Meat Cutting
Salmon Creek Meats
Smithco Meats, Inc.
Weiks Family's Northwest...
Western Meat Co
Wynooche Valley
ZYK Enterprises
Other (please specify)
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%

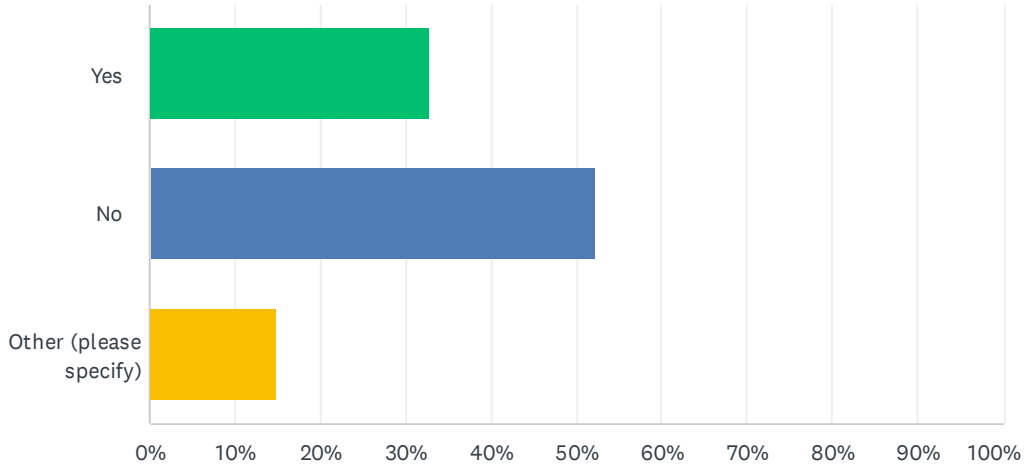
ANSWER CHOICES	RESPONSES	
Butcher Boys Beef Outlet	4.48%	3
Cadillac Ranch Meats	16.42%	11
Custom Meats	2.99%	2
Danmar Farms LLC	0.00%	0
Decker Creek Custom Meats	0.00%	0
Double T Meats, LLC	4.48%	3
Doug's Meats	2.99%	2
Finn’s Custom Meats	14.93%	10
Fischer Meats	0.00%	0
Gibson's Custom Meats	2.99%	2
HB Foods, LLC	0.00%	0
Heritage Meats	16.42%	11
Home Meats	32.84%	22
JNC Garces Livestock	0.00%	0
Kelso’s Kustom Meats	1.49%	1
Lind’s Custom Meats	1.49%	1
Marzolf Meats LLC (Falling River Meats)	4.48%	3
Minder Meats	7.46%	5
Mtn. View Meat & Sausage	11.94%	8
Pacific Fresh Premium Meat	0.00%	0
Puget Sound Processing/Heritage Meats	17.91%	12
Pure Country Harvest	0.00%	0
R&L Custom Meat Cutting	4.48%	3
Salmon Creek Meats	19.40%	13
Smithco Meats, Inc.	1.49%	1
Weiks Family's Northwest Delicacies LLC	0.00%	0
Western Meat Co	0.00%	0
Wynooche Valley	11.94%	8
ZYK Enterprises	0.00%	0
Other (please specify)	29.85%	20
Total Respondents: 67		

#	OTHER (PLEASE SPECIFY)	DATE

1	self processing	3/24/2023 12:24 PM
2	Farmer George	3/24/2023 5:34 AM
3	Farmer George Meats	3/23/2023 9:03 PM
4	Del fox	3/23/2023 4:30 PM
5	Moonlight Meats for custom	3/23/2023 3:21 PM
6	Sweeney's Country Style Meats, Brownsville	3/23/2023 3:06 PM
7	Decker Creek Meats is a 1/2 mi. from us - but we are a little nervous about services there (we know the owner - have decent relationship with him as a neighbor).	3/23/2023 12:40 PM
8	self	3/23/2023 12:23 PM
9	For chickens we rent facility at G&H Pastured Poultry	3/23/2023 12:04 PM
10	Sylvana Meats	3/21/2023 2:01 PM
11	Tried Marzolf and had a terrible experience.	3/21/2023 1:50 PM
12	Limit Bid Packing	3/15/2023 10:37 PM
13	none until 2025	3/14/2023 2:02 PM
14	.	3/10/2023 8:20 PM
15	Bear Ridge in Morton, Stewarts in Yelm	3/10/2023 6:15 AM
16	Havn't processed anything yet, still an early producer	3/10/2023 5:53 AM
17	Stewart’s	3/8/2023 7:27 AM
18	R and L meats is not business	3/7/2023 2:08 PM
19	We do our own	3/4/2023 10:27 AM
20	Uli's sausage, Salt Blade Salami	3/3/2023 9:58 PM

Q14 Do you currently have access to enough slaughter and processing services for your current herd/flock size?

Answered: 67 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	32.84%	22
No	52.24%	35
Other (please specify)	14.93%	10
TOTAL		67

#	OTHER (PLEASE SPECIFY)	DATE
1	We do but you have to book out over a year ahead of time	3/28/2023 6:09 PM
2	Cost to slaughter, cut and wrap have skyrocketed, and convenience of scheduling is terrible. Having to schedule slaugher for beef a year in advance is rediculous. It is very hard to project the condition of animals that far in advance	3/27/2023 11:20 AM
3	Barely. I have to schedule a slaughter almost a year in advance	3/27/2023 8:52 AM
4	Most of the time but not always.	3/25/2023 7:30 AM
5	Yes but it limits the time of year I can sell by beef	3/22/2023 3:17 PM
6	Yes, but lead time is way too long	3/15/2023 10:15 AM
7	sometimes yes, sometimes no. Some variability fue to time of year	3/15/2023 8:11 AM
8	N/A	3/14/2023 2:02 PM
9	Speaking for the industry I would say it is VERY difficult to find. Being retired from production I only require personal use.....it is very hard to find at desired times	3/11/2023 10:53 AM
10	Marginal. More options would be helpful	3/8/2023 12:02 AM

Q15 What are the barriers to accessing slaughter and processing services for your herd/flock size?

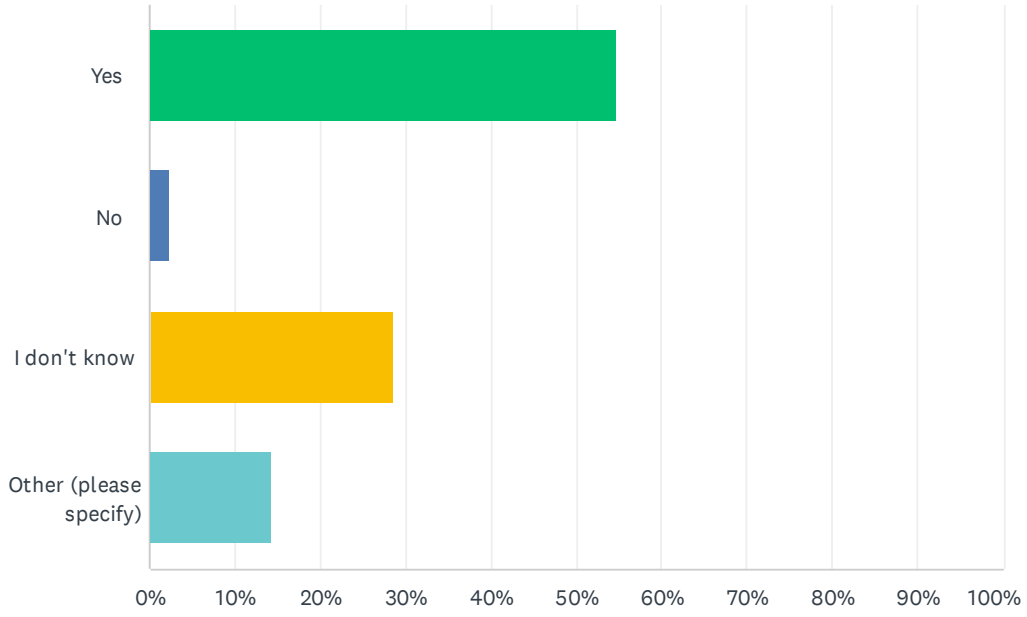
Answered: 42 Skipped: 25

#	RESPONSES	DATE
1	facilities are so busy they can't schedule you with in a years time	3/28/2023 6:10 PM
2	Scheduling a year in advance to get the prime fall butcher dates is a barrier	3/27/2023 11:21 AM
3	Wait time. Rendering services	3/27/2023 8:54 AM
4	Rail space at processors.	3/25/2023 7:32 AM
5	Few appointments available	3/24/2023 8:37 PM
6	Travel distance / cost	3/24/2023 5:36 AM
7	Distance	3/23/2023 9:09 PM
8	Dates. Location. High cost at PSP/Heritage and they dont portion so it limits my sales to restaurants and wholesale. I'm really only able to do retail Cuts direct to consumer.	3/23/2023 7:57 PM
9	Slaughter fee, availability (January slaughter date this year)	3/23/2023 5:03 PM
10	Time	3/23/2023 4:46 PM
11	Not being able to butcher sows	3/23/2023 4:33 PM
12	I would like access to USDA slaughter rather than custom farm exempt	3/23/2023 3:07 PM
13	It isn't the number of cattle we need slaughtered - it is being able to get in touch with the slaughter business - getting call back - although I will say - A & L was the only responsible actor in the fiasco with Home Meats in 2021. Scheduling is an issue - butcher shops are now scheduled out quite a ways.	3/23/2023 12:48 PM
14	available facilities are in high demand	3/23/2023 12:39 PM
15	having a large enough unit to process chickens at a faster pace, we would ultimately want to send our birds to a processing facility if possible but there aren't any close enough to make sense	3/23/2023 12:06 PM
16	Not enough processing facilities, one year in advance of slaughtering dates	3/22/2023 3:20 PM
17	Obtaining USDA inspection & obtaining slaughter dates	3/21/2023 2:03 PM
18	Lack of available processing dates. Lack of USDA mobile slaughter for hogs (we prefer to kill on-site, as we feel it's less stress for the animals)	3/21/2023 1:51 PM
19	Price is the biggest. We raise Icelandic sheep and they have smaller hanging weights, but butcher shops and slaughter are charging more for processesing than we are able to charge for the meat, meaning that they almost make more off each animal than we do. Also for pigs, not all shops are smoking and making bacon/ham and to get into a shop that does is sometimes a year long weighting list	3/16/2023 9:11 AM
20	Slaughter dates are full more than a year in advance.	3/15/2023 1:56 PM
21	Lead time. Distance from slaughter service to my farm. Lack of space in processing facilities. Lack of slaughter service with compatible approach/values (eg Halal)	3/15/2023 10:22 AM
22	scheduling, availability	3/15/2023 8:14 AM
23	Lead time to get into processing service.	3/14/2023 3:20 PM
24	N/A until 2025	3/14/2023 2:04 PM

25	We are required to do on-farm lamb slaughter to meet certification requirements from "A Greener World". They work hand in glove with FACT, a granting agency that has been very helpful.	3/12/2023 11:33 AM
26	Cost, small herd size, unable to sell cuts because no access to usda butcher site, transportation of live animals to services	3/11/2023 5:40 PM
27	Availability, especially in high demand periods....end of summer and fall.	3/11/2023 10:55 AM
28	X	3/10/2023 8:34 PM
29	Didn't find someone that would slaughter and process our chickens.	3/10/2023 8:21 PM
30	Dates when animals are properly fininshed, not a random guess 1-2 years ahead. USDA kill closer would be helpful	3/10/2023 8:20 PM
31	Need local chicken slaughter and processing	3/10/2023 7:07 PM
32	Our biggest hurdle is not knowing exactly how many animals we will have for the shops until the night of the auction. Shops are hesitant to hold spots for us due to this, but thankfully they see the value of supporting the youth in the market animal sale.	3/10/2023 6:18 AM
33	The advance notice to processors/shops being a year out is hard to plan for goats	3/10/2023 5:54 AM
34	no usda facility that is near and consistently open or accepting new customers	3/9/2023 2:31 PM
35	We can not get affordable USDA certified slaughter, carcass certification	3/8/2023 1:46 PM
36	Availability for select slaughter dates are a problem. I need more dates in September/October for cattle slaughter. Booking slaughter dates 12-15 months out is a problem for the industry as a whole. Slaughter, butchers and producers have a hard time working within those types of timelines. The lack of USDA slaughter in western Washington is also a huge problem. I'd have to truck my cattle to Oregon for USDA slaughter. This really limits our ranch's ability to market select cuts of beef, including ground beef, direct to consumer. Many times consumers do not want 1/2 beef, but instead want 4 ribeyes or 25 lb of ground beef.	3/8/2023 8:12 AM
37	Lack of available butcher dates. I breed and raise my own and 12-18 months for butcher dates is a lot	3/8/2023 7:29 AM
38	Availability, scheduling/timing based on stock finish condition.	3/8/2023 12:05 AM
39	Wait times for large animals; no poultry processors available	3/7/2023 10:16 PM
40	No halal service	3/7/2023 2:17 PM
41	not enough services ; i would butcher twice as much if their were more trucks	3/7/2023 10:41 AM
42	price and distance to slaughter	3/6/2023 9:46 AM

Q16 If more slaughter and processing services were available, would you plan on increasing herd/flock size?

Answered: 42 Skipped: 25

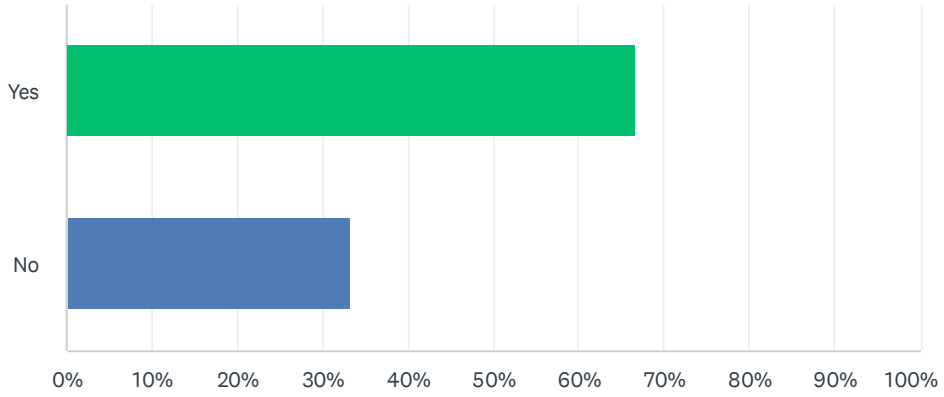


ANSWER CHOICES	RESPONSES	
Yes	54.76%	23
No	2.38%	1
I don't know	28.57%	12
Other (please specify)	14.29%	6
TOTAL		42

#	OTHER (PLEASE SPECIFY)	DATE
1	Maybe, we're a small operation	3/24/2023 8:37 PM
2	If we were to continue raising beef, the herd size with our available cutting hay and pasture would be about 4 - 5 animal units. We have always bred our cows, and raised the calves to slaughter age. We plan to retire to smaller property in couple years - so whoever takes this place over might have a different program, depending on how they wanted to operate.	3/23/2023 12:48 PM
3	I have moved away from commercial meat production due to lack of acceptable slaughter and butcher facilities. Not sure I will ramp back up even with new facilities.	3/15/2023 10:22 AM
4	maybe increase but also dependent on farm infastructure and availibility of land	3/15/2023 8:14 AM
5	Re; lambs, probably by 10-20%, access to grazing being the other factor- = 10 to slaughter/yr.	3/12/2023 11:33 AM
6	Yes, more importantly is to get access to USDA slaughter, and processing	3/8/2023 1:46 PM

Q19 Would you like to join us for a focus group to talk further with Pierce and Thurston counties about the barriers you face as a producer and potential solutions?

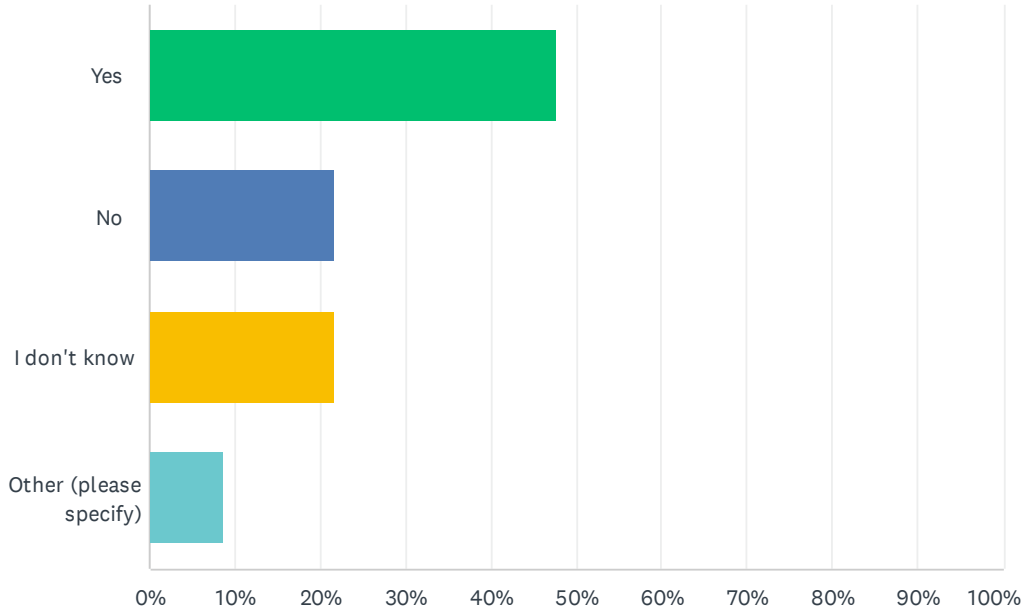
Answered: 39 Skipped: 28



ANSWER CHOICES	RESPONSES	
Yes	66.67%	26
No	33.33%	13
TOTAL		39

Q20 If more slaughter and processing services were available, would you plan on increasing herd/flock size?

Answered: 23 Skipped: 44

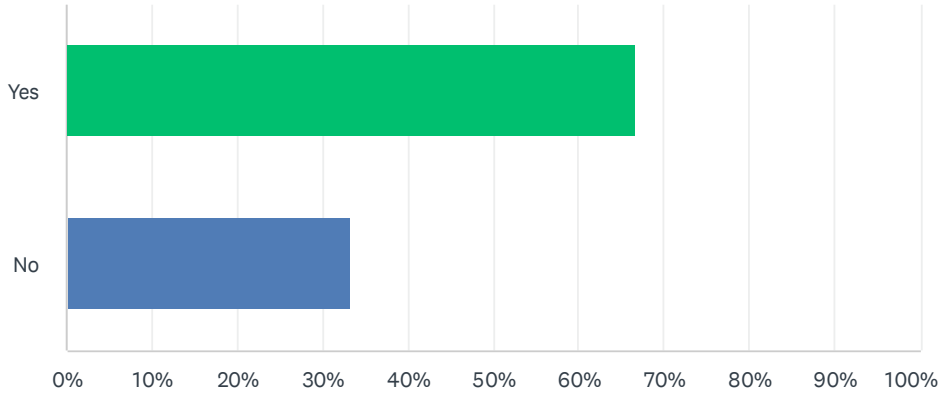


ANSWER CHOICES	RESPONSES	
Yes	47.83%	11
No	21.74%	5
I don't know	21.74%	5
Other (please specify)	8.70%	2
TOTAL		23

#	OTHER (PLEASE SPECIFY)	DATE
1	We have a limited timeframe to utilize our animals. We have to make one year in advance processing dates.	3/22/2023 3:14 PM
2	It is difficult to schedule far in advance but as long as you do that you can get a slot.	3/7/2023 2:10 PM

Q23 Would you like to join us for a focus group to talk further with Pierce and Thurston counties about the barriers you face as a producer and potential solutions?

Answered: 21 Skipped: 46



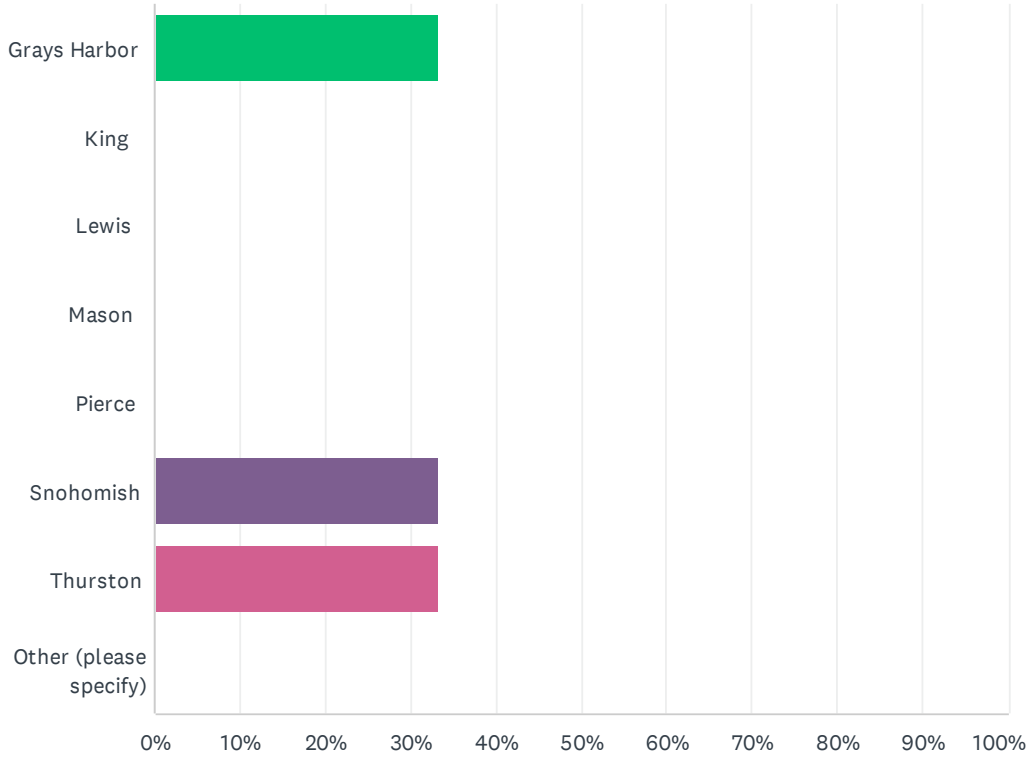
ANSWER CHOICES	RESPONSES	
Yes	66.67%	14
No	33.33%	7
TOTAL		21

APPENDIX F

2023 PROCESSOR SURVEY

Q1 What county do you operate in?

Answered: 3 Skipped: 0



ANSWER CHOICES	RESPONSES	
Grays Harbor	33.33%	1
King	0.00%	0
Lewis	0.00%	0
Mason	0.00%	0
Pierce	0.00%	0
Snohomish	33.33%	1
Thurston	33.33%	1
Other (please specify)	0.00%	0
TOTAL		3

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

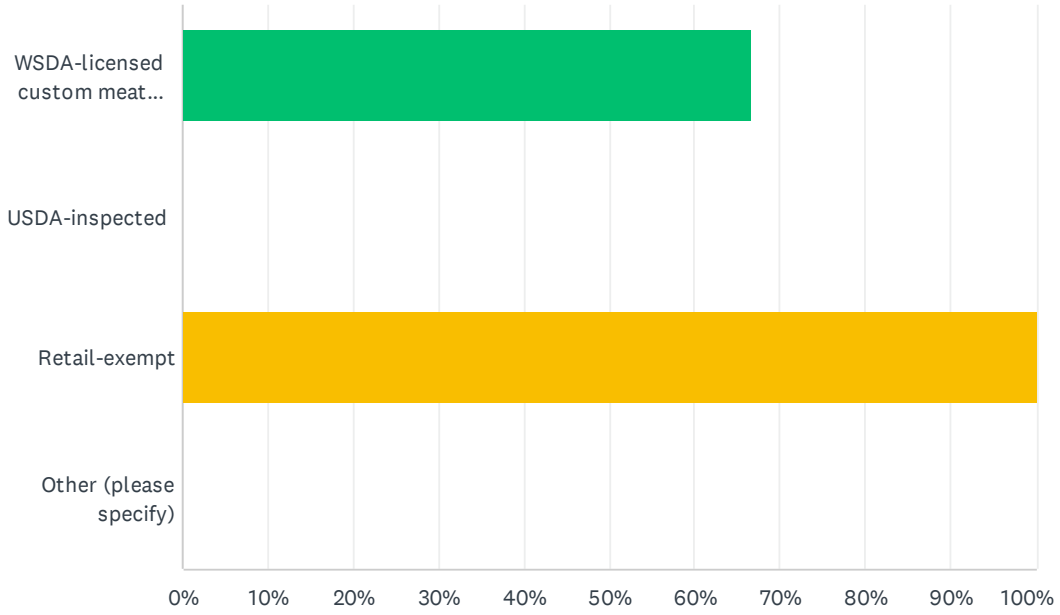
Q2 How many years have you been in business?

Answered: 3 Skipped: 0

#	RESPONSES	DATE
1	7	4/21/2023 5:28 PM
2	2	4/14/2023 4:42 PM
3	2	4/6/2023 1:38 PM

Q3 What type of WSDA or USDA licensed business are you?Check all that apply.

Answered: 3 Skipped: 0



ANSWER CHOICES	RESPONSES	
WSDA-licensed custom meat facility (cut & wrap)	66.67%	2
USDA-inspected	0.00%	0
Retail-exempt	100.00%	3
Other (please specify)	0.00%	0
Total Respondents: 3		

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

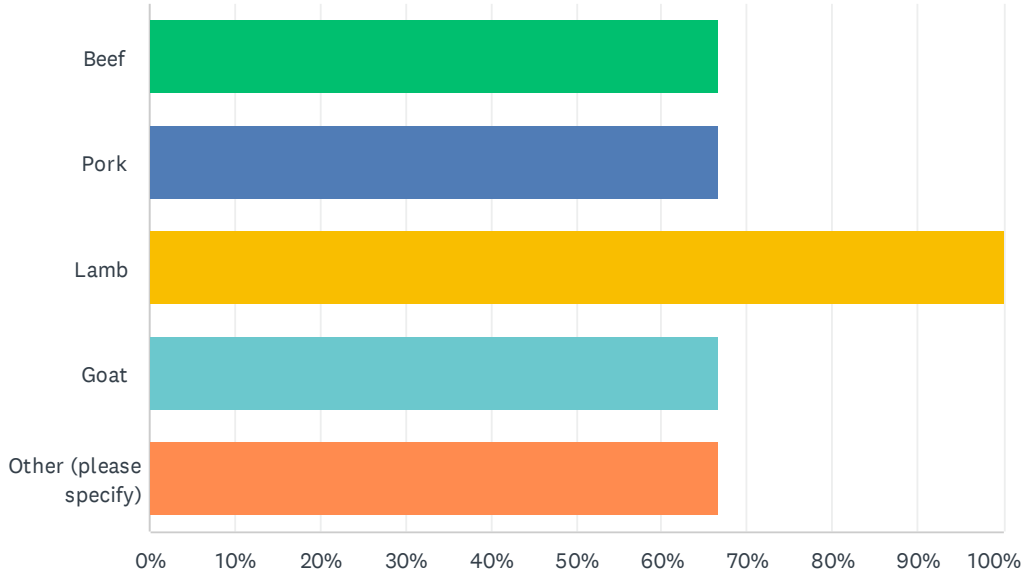
Q4 How many unique farm/ranch clients do you serve annually?

Answered: 2 Skipped: 1

#	RESPONSES	DATE
1	10	4/21/2023 5:28 PM
2	200	4/14/2023 4:42 PM

Q5 What type of meat does your business process?Check all that apply.

Answered: 3 Skipped: 0



ANSWER CHOICES	RESPONSES	
Beef	66.67%	2
Pork	66.67%	2
Lamb	100.00%	3
Goat	66.67%	2
Other (please specify)	66.67%	2
Total Respondents: 3		

#	OTHER (PLEASE SPECIFY)	DATE
1	Wild Game- Elk, Deer, Moose, Antelope	4/21/2023 5:28 PM
2	Game	4/14/2023 4:42 PM

Q6 How many animals did you process in 2021?Fill in processing numbers for all that apply.

Answered: 3 Skipped: 0

ANSWER CHOICES	RESPONSES	
Cattle	66.67%	2
Pigs	66.67%	2
Lambs	66.67%	2
Goats	100.00%	3
Other (please specify type of animal)	33.33%	1

#	CATTLE	DATE
1	8	4/21/2023 5:28 PM
2	200	4/14/2023 4:42 PM
#	**PIGS**	**DATE**
1	12	4/21/2023 5:28 PM
2	300	4/14/2023 4:42 PM
#	**LAMBS**	**DATE**
1	10	4/21/2023 5:28 PM
2	100	4/14/2023 4:42 PM
#	**GOATS**	**DATE**
1	2	4/21/2023 5:28 PM
2	20	4/14/2023 4:42 PM
3	2	4/6/2023 1:38 PM
#	**OTHER (PLEASE SPECIFY TYPE OF ANIMAL)**	**DATE**
1	Wild Game- Elk, Deer, Moose- 30-40	4/21/2023 5:28 PM

Q7 How many animals did you process in 2022?Fill in processing numbers for all that apply.

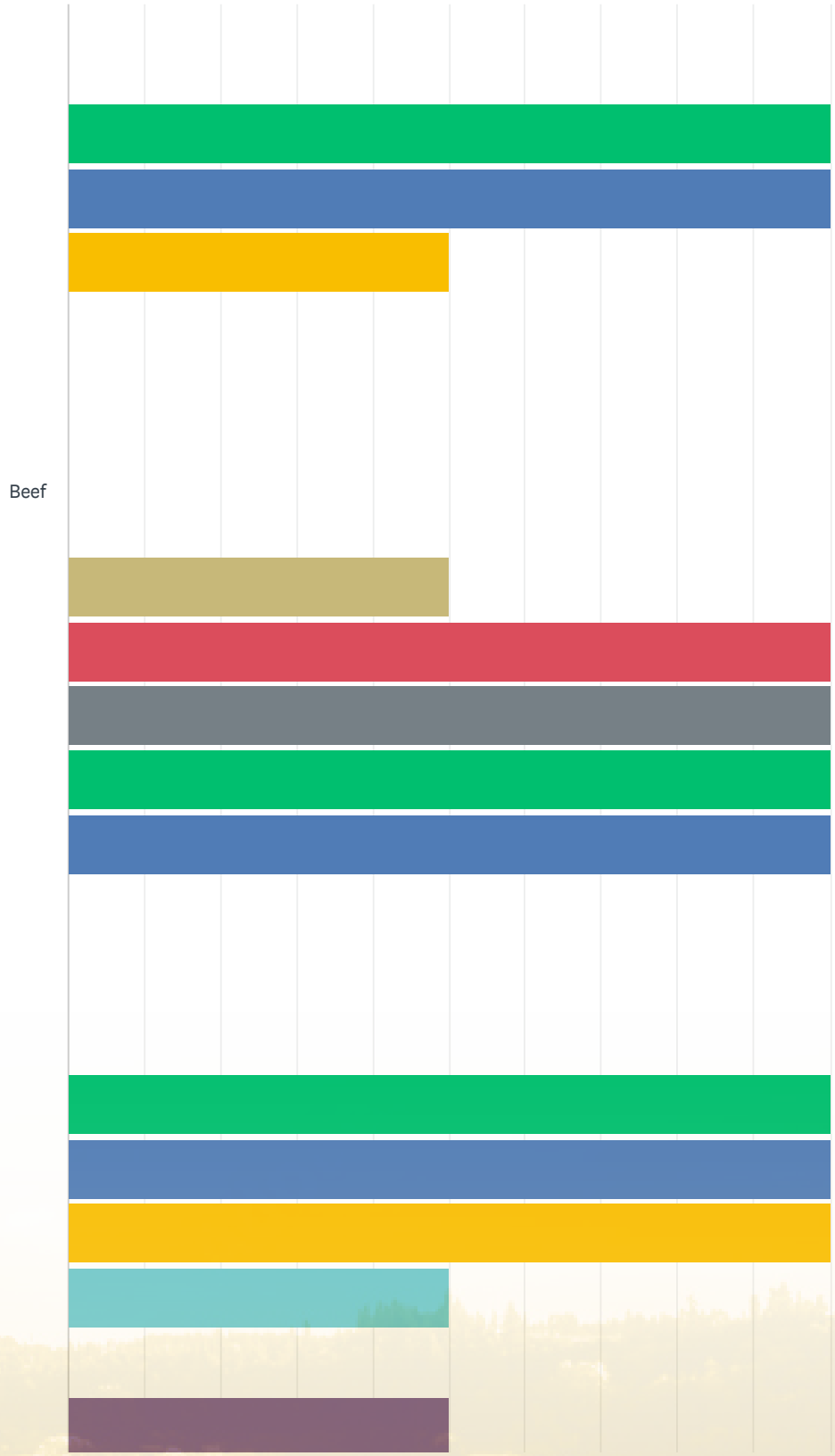
Answered: 3 Skipped: 0

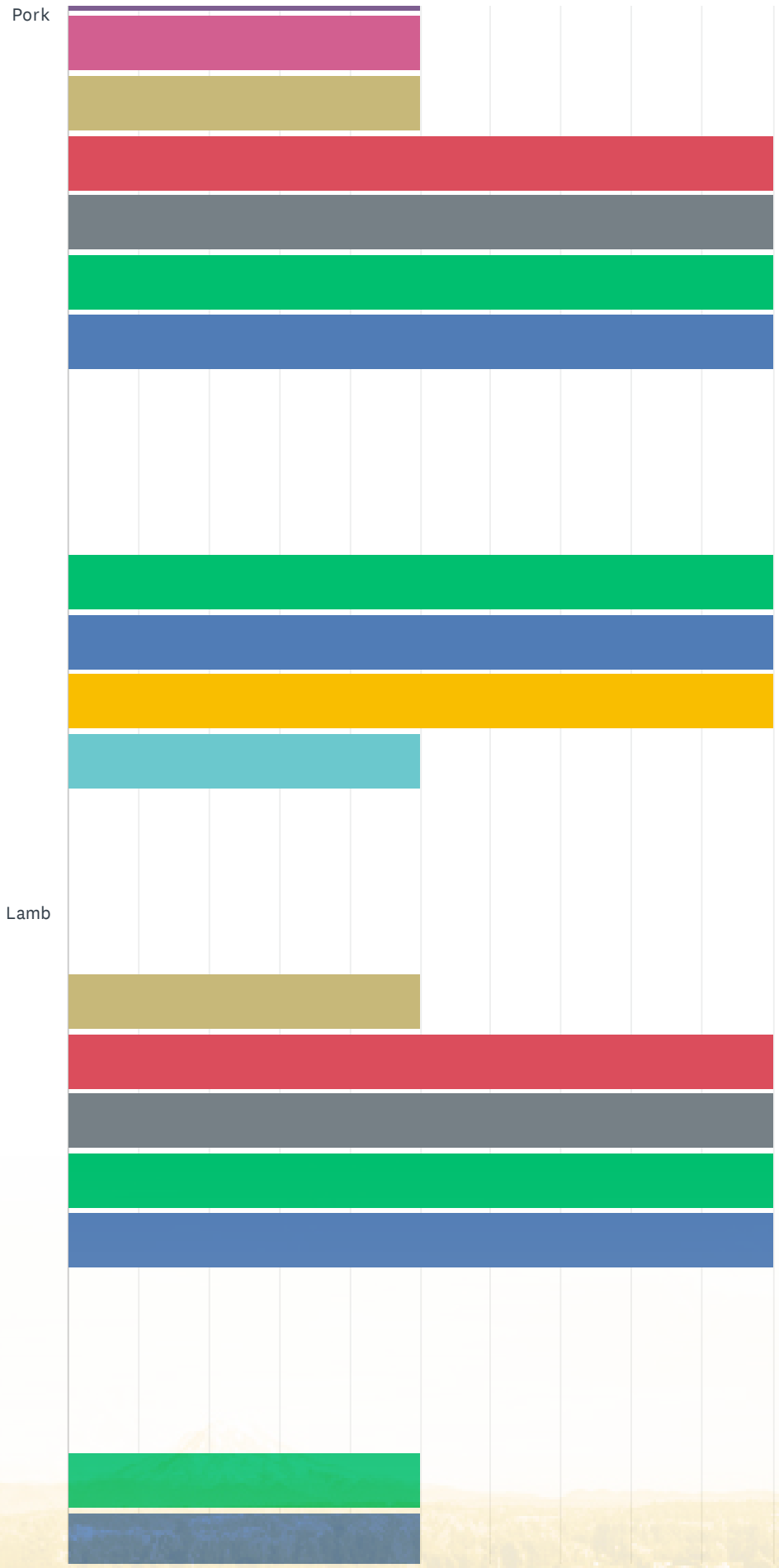
ANSWER CHOICES	RESPONSES	
Cattle	100.00%	3
Pigs	66.67%	2
Lambs	66.67%	2
Goats	33.33%	1
Other (please specify type of animal)	33.33%	1

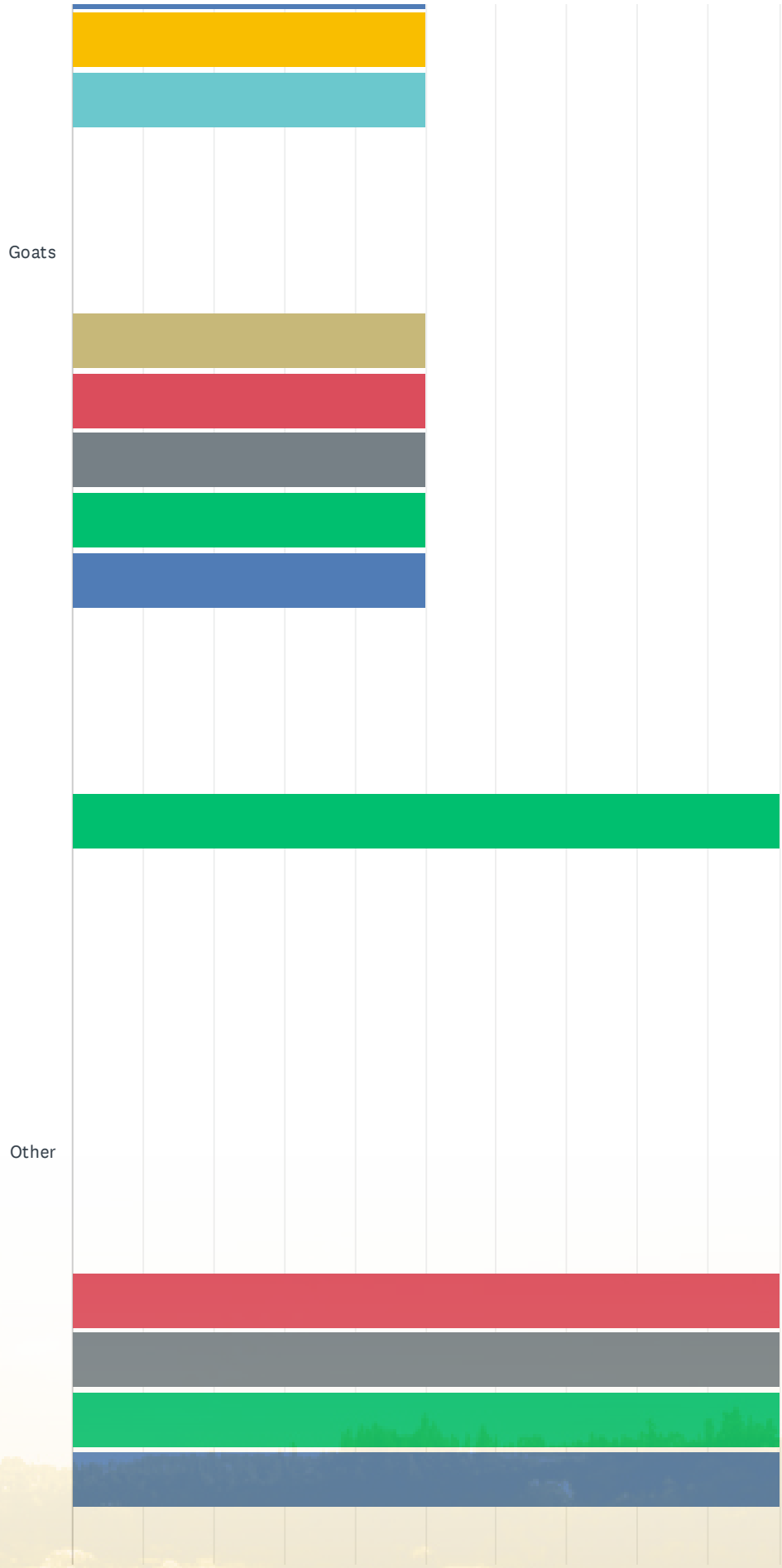
#	CATTLE	DATE
1	10	4/21/2023 5:28 PM
2	300	4/14/2023 4:42 PM
3	2	4/6/2023 1:38 PM
#	**PIGS**	**DATE**
1	15	4/21/2023 5:28 PM
2	400	4/14/2023 4:42 PM
#	**LAMBS**	**DATE**
1	10	4/21/2023 5:28 PM
2	100	4/14/2023 4:42 PM
#	**GOATS**	**DATE**
1	20	4/14/2023 4:42 PM
#	**OTHER (PLEASE SPECIFY TYPE OF ANIMAL)**	**DATE**
1	Wild Game- Elk, Deer, Moose- 30-40	4/21/2023 5:28 PM

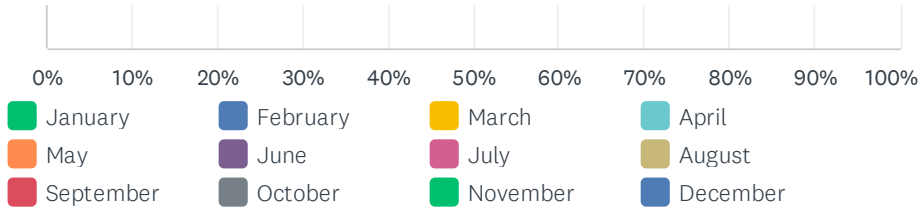
Q8 What is your peak time of year for the meat that you process?Check all months that apply.

Answered: 3 Skipped: 0




Pork
Lamb

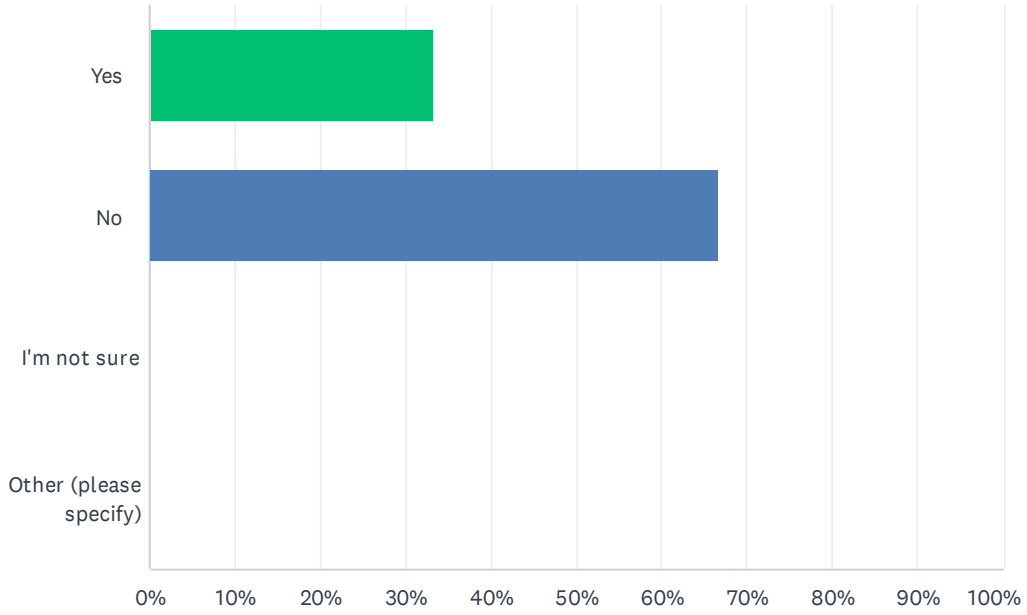

Goats
Other



	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER
Beef	100.00% 2	100.00% 2	50.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	50.00% 1	100.00% 2	100.00% 2
Pork	100.00% 2	100.00% 2	100.00% 2	50.00% 1	0.00% 0	50.00% 1	50.00% 1	50.00% 1	100.00% 2	100.00% 2
Lamb	100.00% 2	100.00% 2	100.00% 2	50.00% 1	0.00% 0	0.00% 0	0.00% 0	50.00% 1	100.00% 2	100.00% 2
Goats	50.00% 1	50.00% 1	50.00% 1	50.00% 1	0.00% 0	0.00% 0	0.00% 0	50.00% 1	50.00% 1	50.00% 1
Other	100.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 1	100.00% 1

Q9 Is waste management a challenge for your business today?Examples of waste management include wastewater, rendering, permitting and inspection issues, methods of disposal, etc.

Answered: 3 Skipped: 0

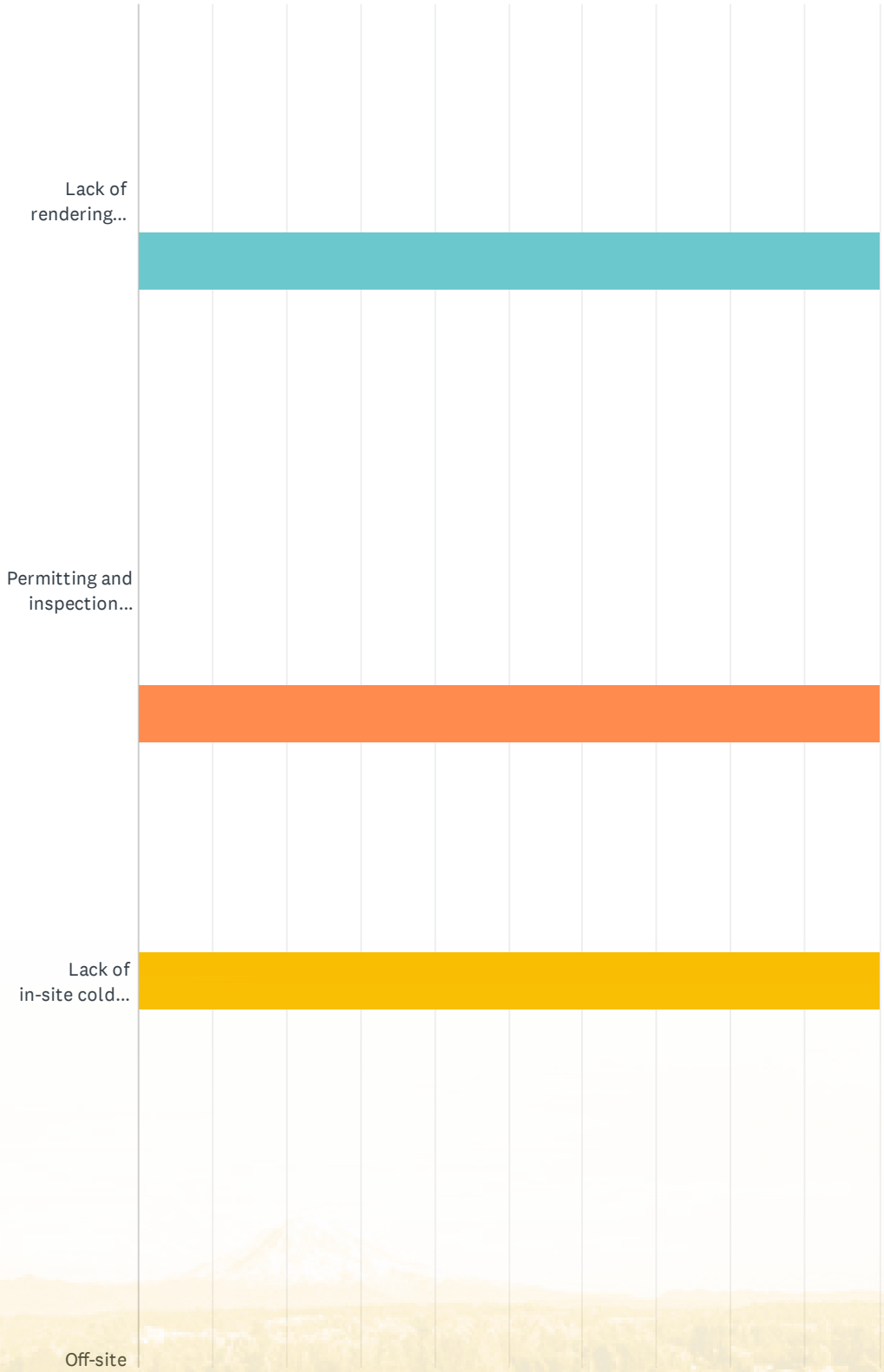


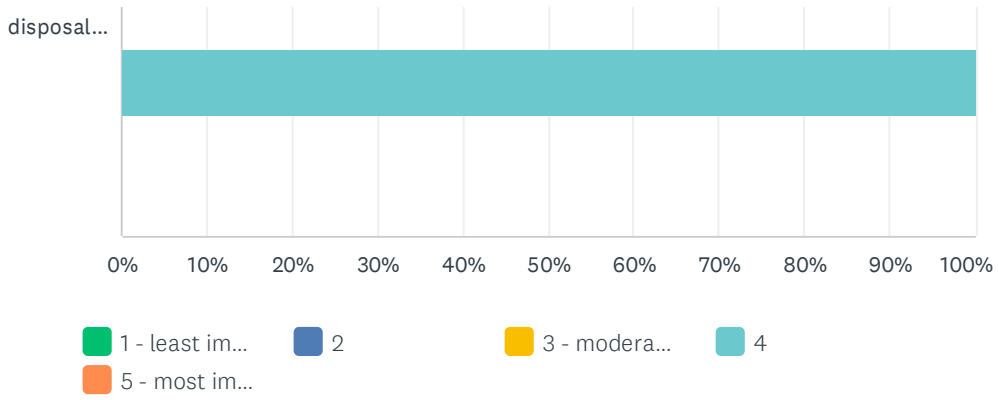
ANSWER CHOICES	RESPONSES	
Yes	33.33%	1
No	66.67%	2
I'm not sure	0.00%	0
Other (please specify)	0.00%	0
TOTAL		3

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q10 Of the waste management challenges listed below, rate the following concerns on a scale of 1 to 5, with 1 being least important and 5 being most important.

Answered: 1 Skipped: 2





	1 - LEAST IMPORTANT	2	3 - MODERATELY IMPORTANT	4	5 - MOST IMPORTANT	TOTAL
Lack of rendering services	0.00% 0	0.00% 0	0.00% 0	100.00% 1	0.00% 0	1
Permitting and inspection issues	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 1	1
Lack of in-site cold storage to hold waste before collection or hauling to dump	0.00% 0	0.00% 0	100.00% 1	0.00% 0	0.00% 0	1
Off-site disposal options	0.00% 0	0.00% 0	0.00% 0	100.00% 1	0.00% 0	1

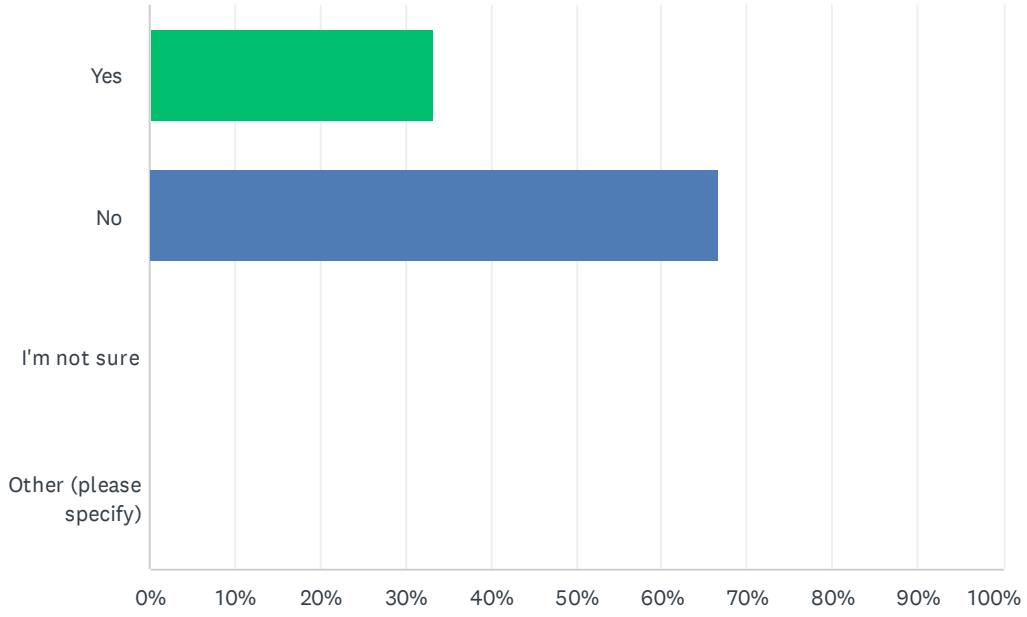
Q11 Are there any other waste management challenges that are a concern for your business today?

Answered: 1 Skipped: 2

#	RESPONSES	DATE
1	Blood and effluent disposal	4/14/2023 4:43 PM

Q12 Do you have site layout/functionality challenges that make it difficult to increase your capacity?

Answered: 3 Skipped: 0

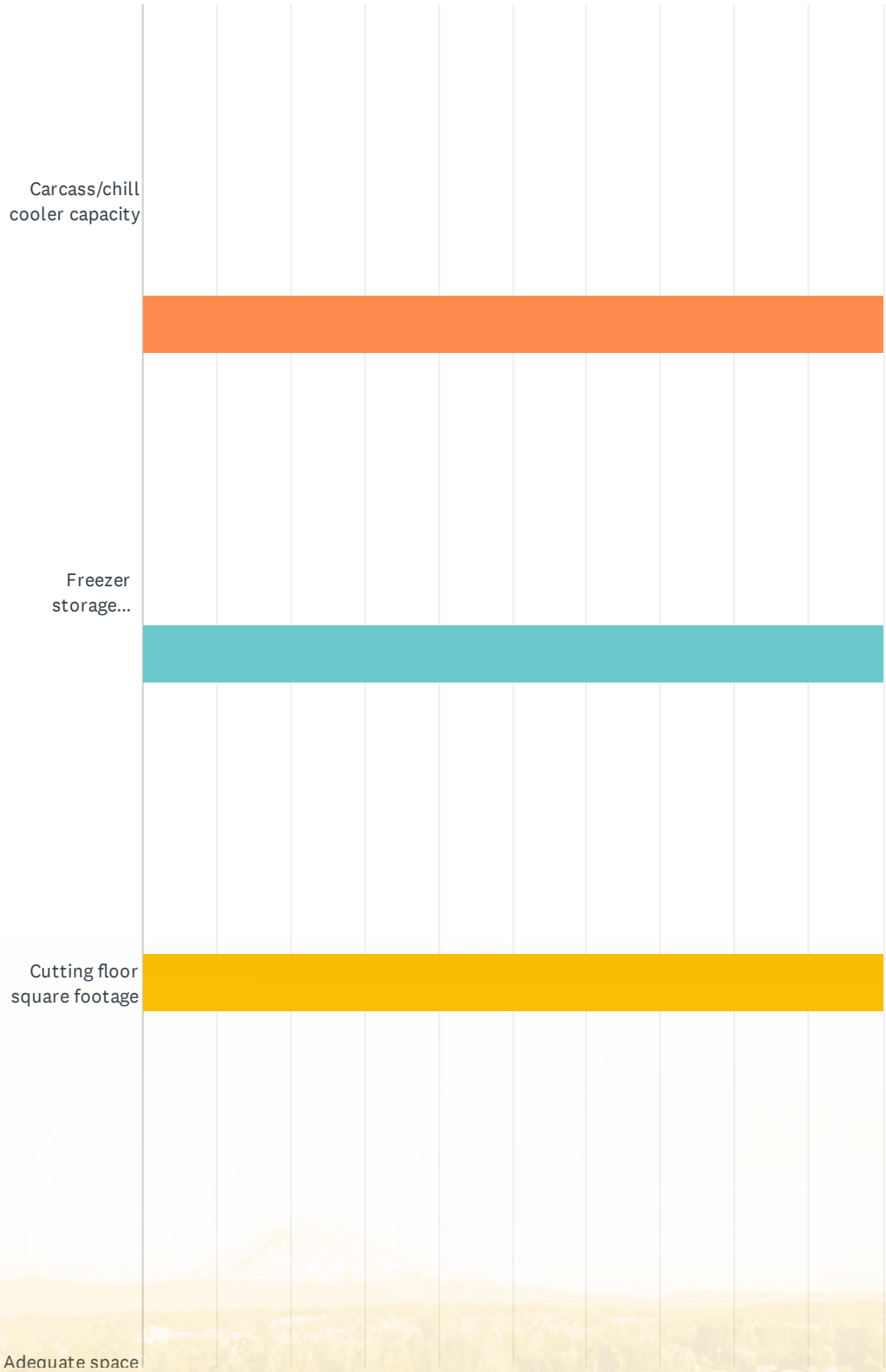


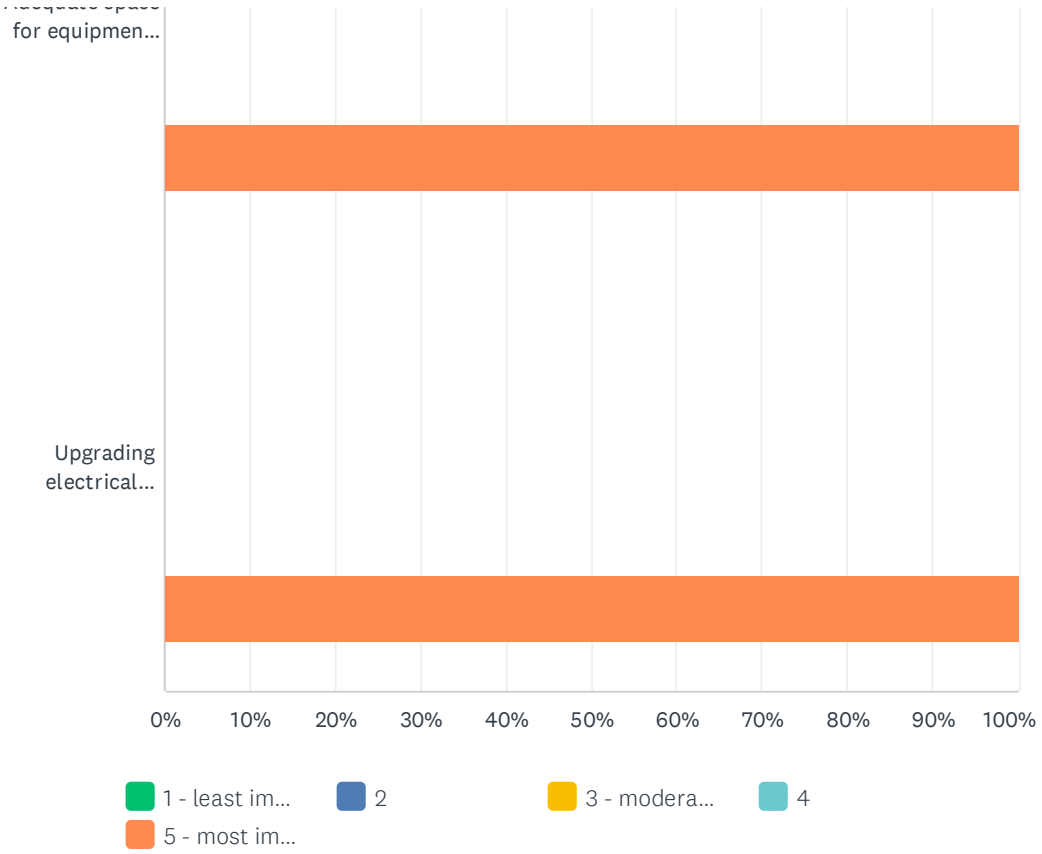
ANSWER CHOICES	RESPONSES	
Yes	33.33%	1
No	66.67%	2
I'm not sure	0.00%	0
Other (please specify)	0.00%	0
TOTAL		3

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q13 Of the site layout/functionality challenges listed below, rate the following concerns on a scale of 1 to 5, with 1 being least important and 5 being most important.

Answered: 1 Skipped: 2





	1 - LEAST IMPORTANT	2	3 - MODERATELY IMPORTANT	4	5 - MOST IMPORTANT	TOTAL
Carcass/chill cooler capacity	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 1	1
Freezer storage capacity	0.00% 0	0.00% 0	0.00% 0	100.00% 1	0.00% 0	1
Cutting floor square footage	0.00% 0	0.00% 0	100.00% 1	0.00% 0	0.00% 0	1
Adequate space for equipment upgrades	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 1	1
Upgrading electrical utilities	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 1	1

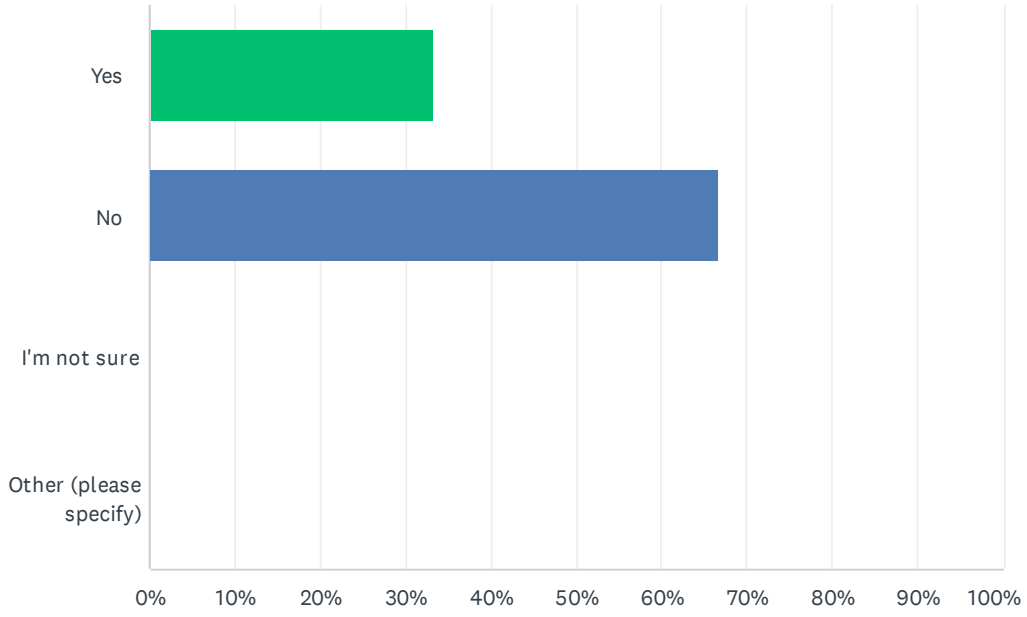
Q14 Are there any other site layout/functionality challenges that make it difficult to increase your capacity?

Answered: 1 Skipped: 2

#	RESPONSES	DATE
1	NA	4/21/2023 5:30 PM

Q15 Do you have equipment challenges that make it difficult to increase your capacity?

Answered: 3 Skipped: 0

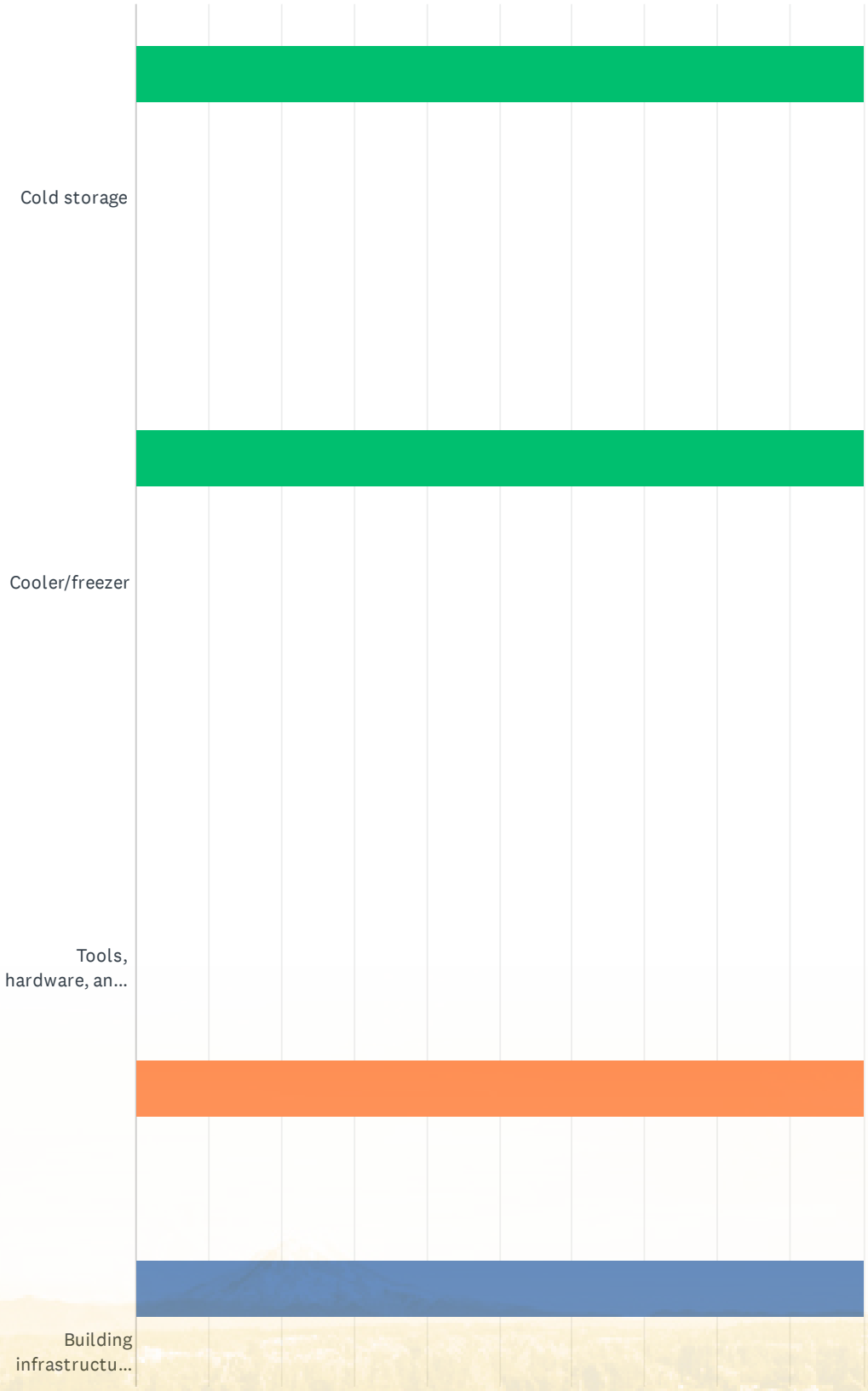


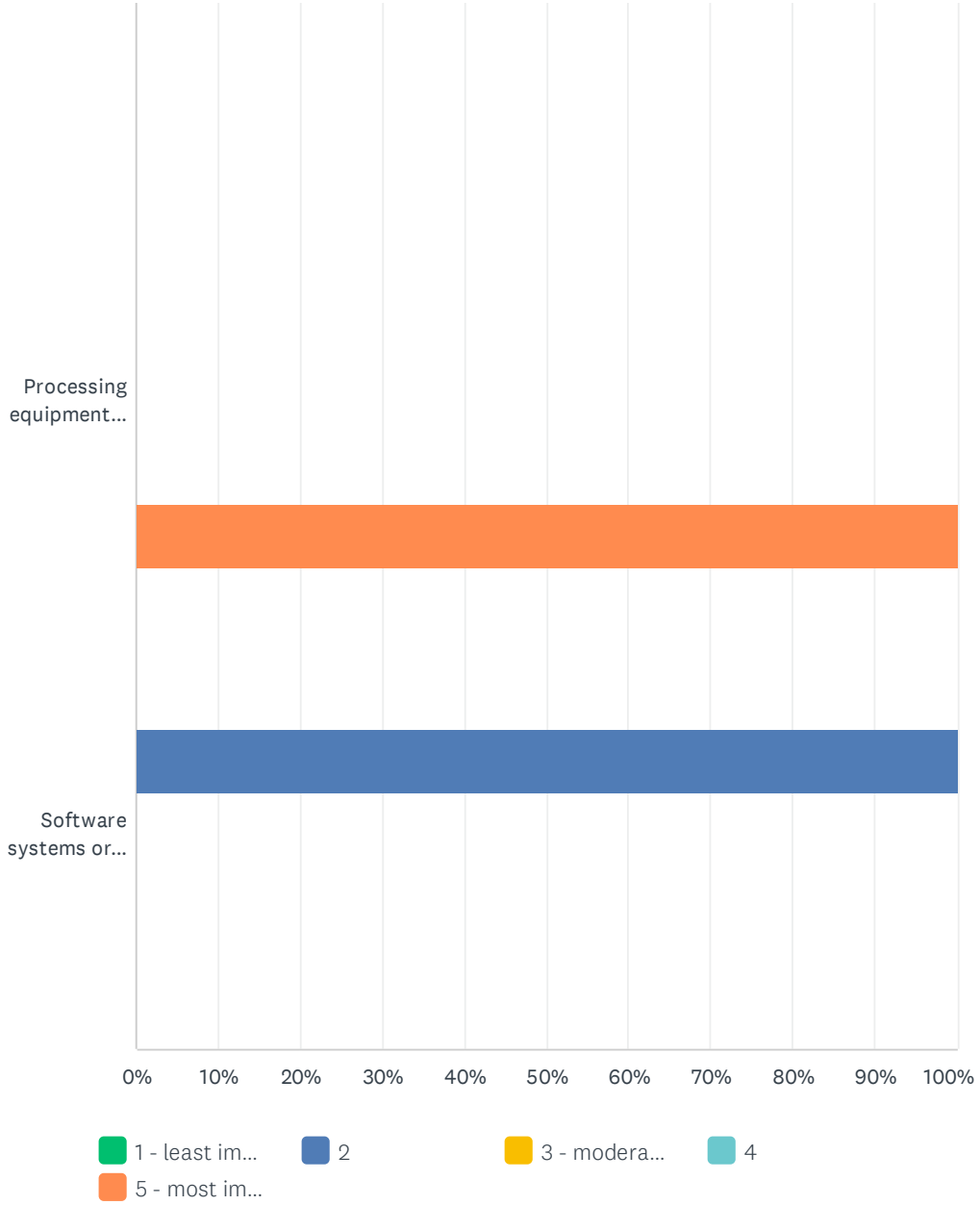
ANSWER CHOICES	RESPONSES	
Yes	33.33%	1
No	66.67%	2
I'm not sure	0.00%	0
Other (please specify)	0.00%	0
TOTAL		3

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q16 Of the equipment challenges listed below, rate the following needs on a scale of 1 to 5, with 1 being least important and 5 being most important.

Answered: 1 Skipped: 2





	1 - LEAST IMPORTANT	2	3 - MODERATELY IMPORTANT	4	5 - MOST IMPORTANT	TOTAL
Cold storage	100.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	1
Cooler/freezer	100.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	1
Tools, hardware, and equipment, (saws, knives, scales)	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 1	1
Building infrastructure (hooks, hanging rails)	0.00% 0	100.00% 1	0.00% 0	0.00% 0	0.00% 0	1
Processing equipment (grinders, smokers, vacuum sealers, etc.)	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 1	1
Software systems or other business management tools	0.00% 0	100.00% 1	0.00% 0	0.00% 0	0.00% 0	1

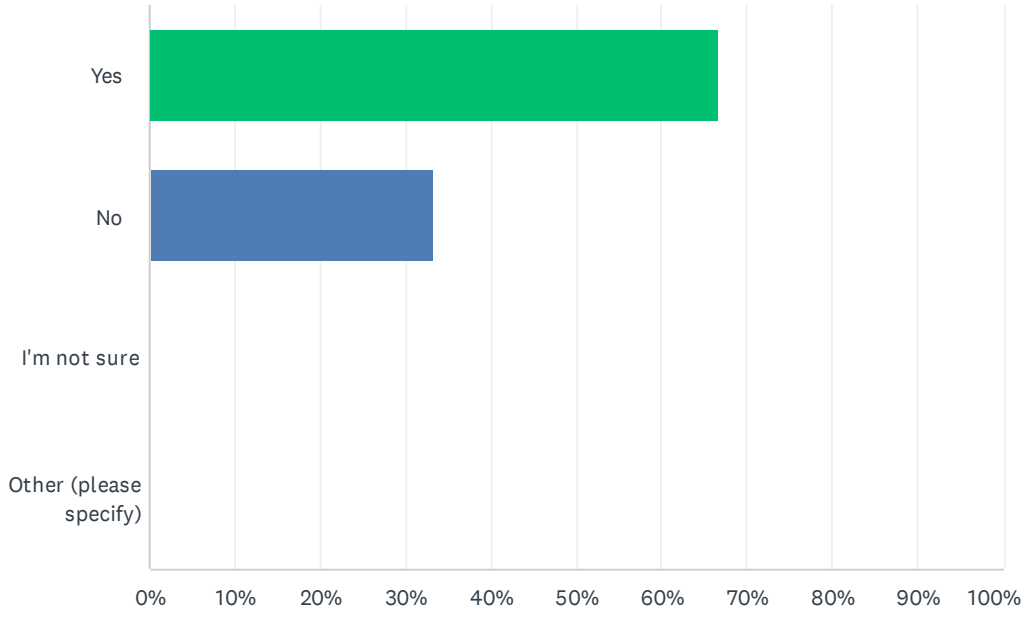
Q17 Are there any other equipment challenges that make it difficult to increase your capacity?

Answered: 1 Skipped: 2

#	RESPONSES	DATE
1	Tiper tie machine for burger	4/14/2023 4:45 PM

Q18 Do you have labor challenges that make it difficult to increase your capacity?

Answered: 3 Skipped: 0

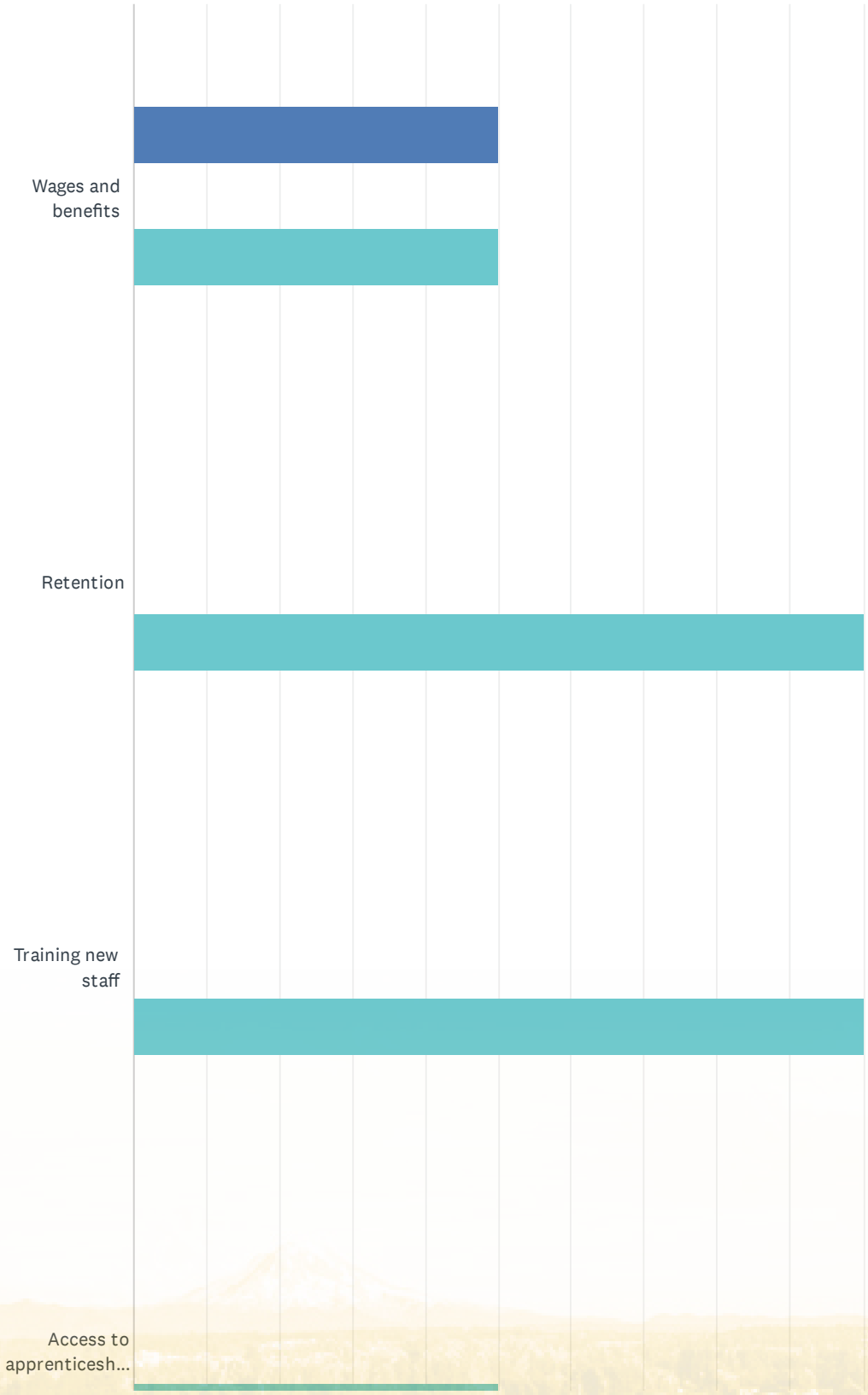


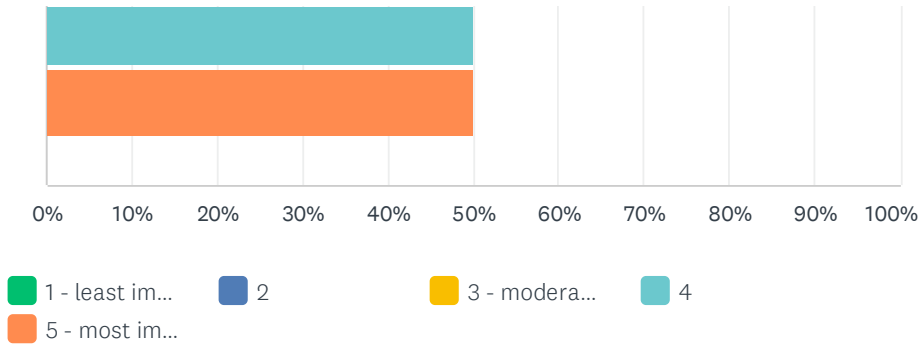
ANSWER CHOICES	RESPONSES	
Yes	66.67%	2
No	33.33%	1
I'm not sure	0.00%	0
Other (please specify)	0.00%	0
TOTAL		3

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q19 Of the labor challenges listed below, rate the following concerns on a scale of 1 to 5, with 1 being least important and 5 being most important.

Answered: 2 Skipped: 1





	1 - LEAST IMPORTANT	2	3 - MODERATELY IMPORTANT	4	5 - MOST IMPORTANT	TOTAL
Wages and benefits	0.00% 0	50.00% 1	0.00% 0	50.00% 1	0.00% 0	2
Retention	0.00% 0	0.00% 0	0.00% 0	100.00% 2	0.00% 0	2
Training new staff	0.00% 0	0.00% 0	0.00% 0	100.00% 2	0.00% 0	2
Access to apprenticeship programs	0.00% 0	0.00% 0	0.00% 0	50.00% 1	50.00% 1	2

Q20 Are there any other labor challenges that make it difficult to increase your capacity?

Answered: 2 Skipped: 1

#	RESPONSES	DATE
1	Hard to find skilled workers interested in the meat industry. It is a labor extensive job.	4/21/2023 5:32 PM
2	Slow season retention	4/14/2023 4:45 PM

Q21 Do you plan on growing your business? If so, do you have any additional barriers to growth?

Answered: 2 Skipped: 1

#	RESPONSES	DATE
1	Would like to grow, but biggest barrier is cost for expansion.	4/21/2023 5:34 PM
2	Yes, Money to upgrade.	4/14/2023 4:47 PM

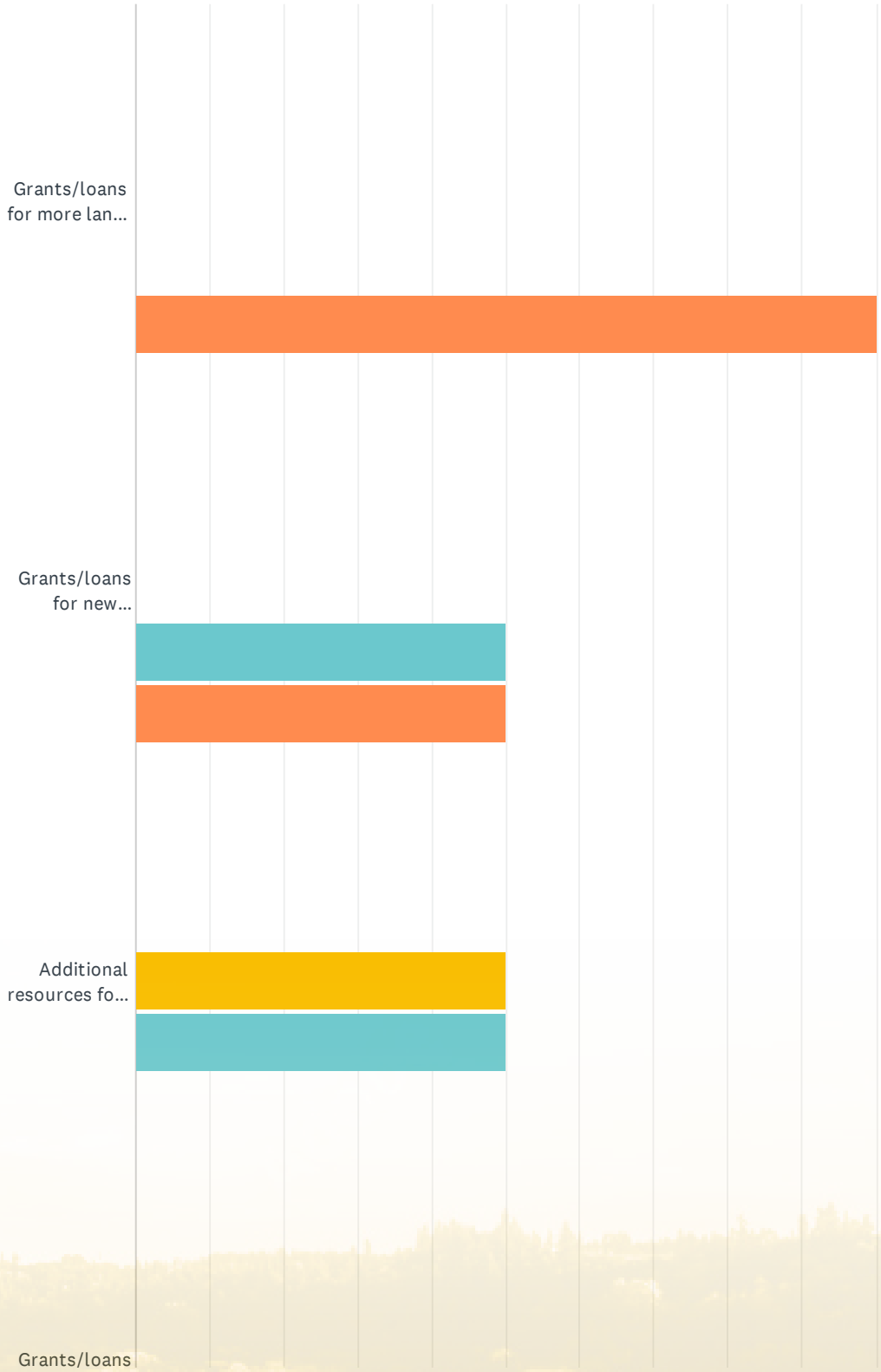
Q22 Will you be transitioning your business in the next 5 years? If so, do you have a succession plan?

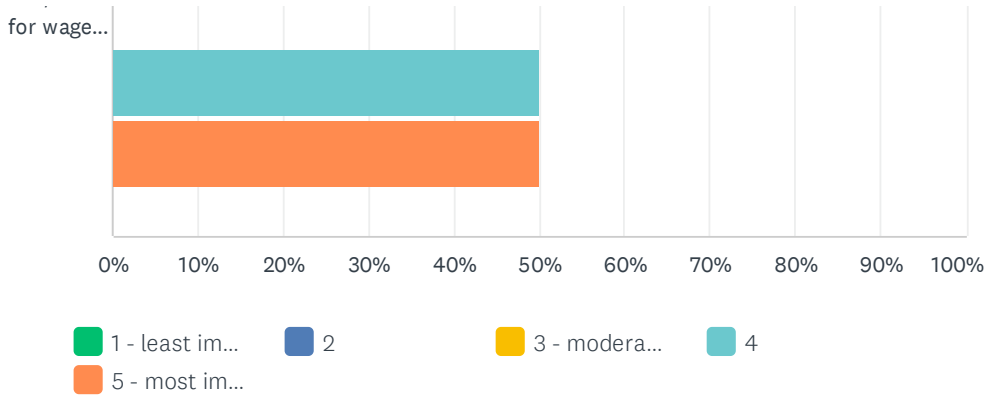
Answered: 2 Skipped: 1

#	RESPONSES	DATE
1	NA	4/21/2023 5:34 PM
2	Yes. No.	4/14/2023 4:47 PM

Q23 What solution would be most impactful to addressing your barriers? Rank the following solutions on a scale of 1 to 5, with 1 being least important and 5 being most important.

Answered: 2 Skipped: 1

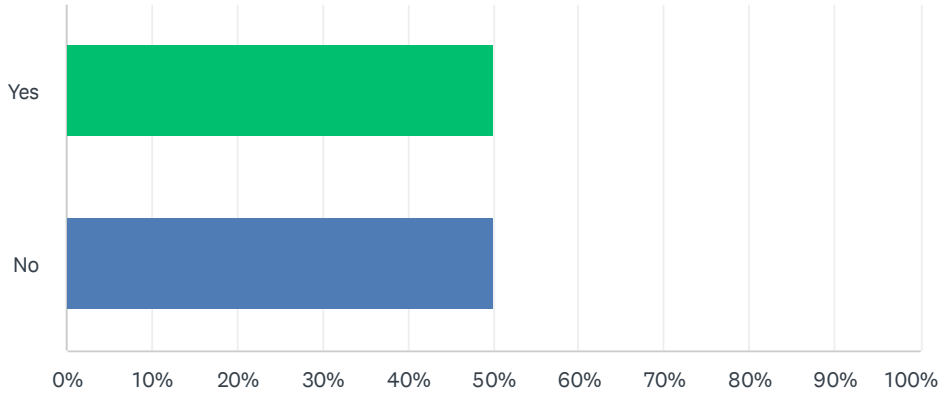




	1 - LEAST IMPORTANT	2	3 - MODERATELY IMPORTANT	4	5 - MOST IMPORTANT	TOTAL
Grants/loans for more land or building space for my operations	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 2	2
Grants/loans for new equipment	0.00% 0	0.00% 0	0.00% 0	50.00% 1	50.00% 1	2
Additional resources for workforce training	0.00% 0	0.00% 0	50.00% 1	50.00% 1	0.00% 0	2
Grants/loans for wage subsidies for on-the-job (OTJ) trainee hires	0.00% 0	0.00% 0	0.00% 0	50.00% 1	50.00% 1	2

Q24 Would you like to offer new value-added products to your farm/ranch clients?

Answered: 2 Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	50.00%	1
No	50.00%	1
TOTAL		2

Q25 What new value-added products would you like to offer to your farm/ranch clients?

Answered: 1 Skipped: 2

#	RESPONSES	DATE
1	Smoked products	4/14/2023 4:47 PM

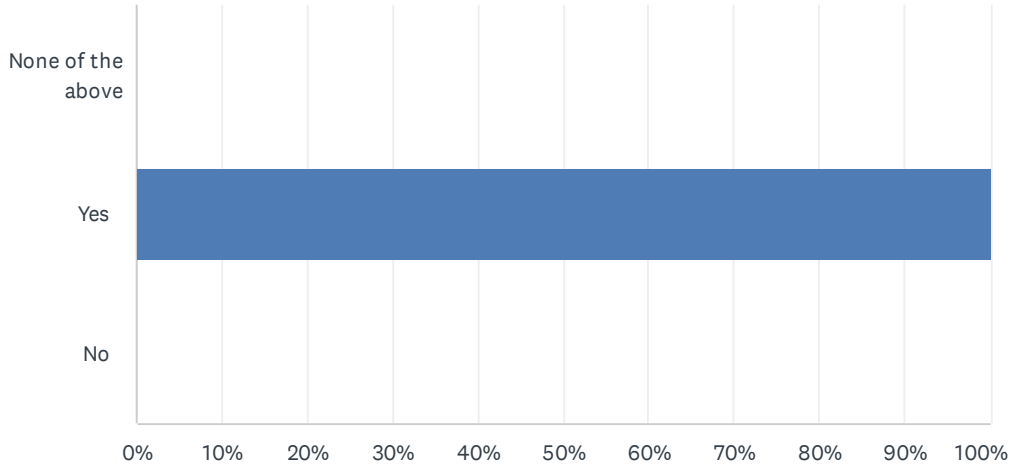
Q26 If you had $100,000 to increase your processing capacity, what would you spend it on and how much would your capacity increase?

Answered: 2 Skipped: 1

#	RESPONSES	DATE
1	I would spend it on upgrades of equipment, walk-in freezer space, more railing to hang more animals for processing, as well as more employees to aid in processing more animals.	4/21/2023 5:38 PM
2	Tiper tie machine It would increase production capacity by 50%	4/14/2023 4:50 PM

Q29 Would you like to join us for a focus group to talk further with Pierce and Thurston counties about the barriers you face and potential solutions?

Answered: 2 Skipped: 1



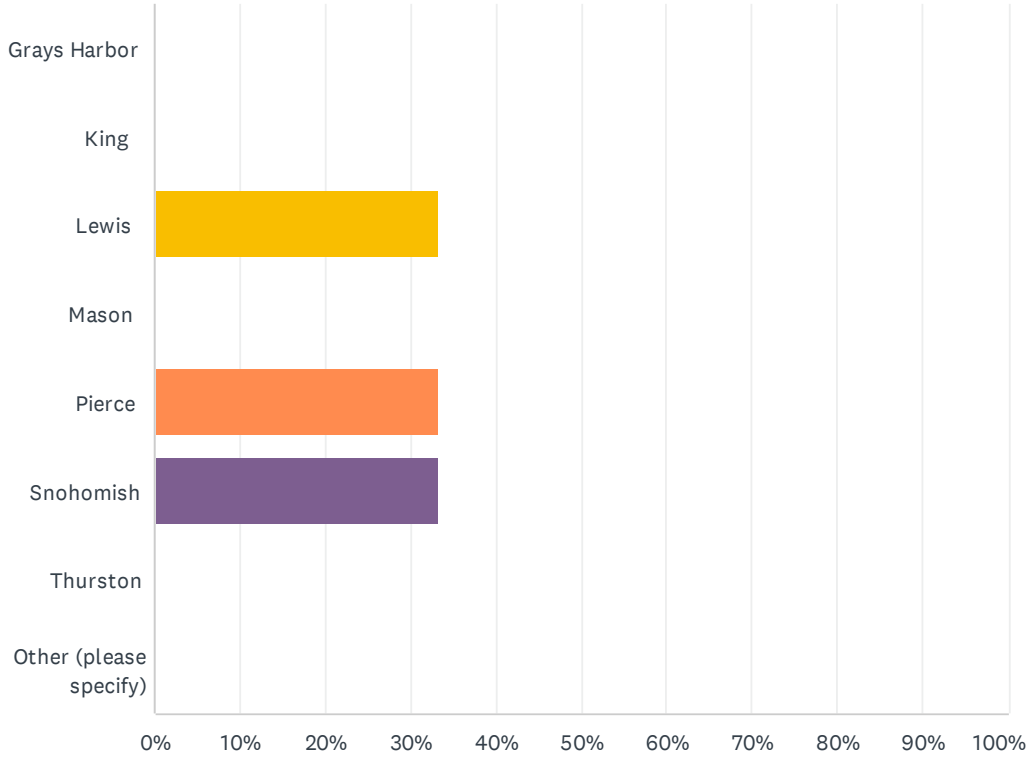
ANSWER CHOICES	RESPONSES	
None of the above	0.00%	0
Yes	100.00%	2
No	0.00%	0
TOTAL		2

APPENDIX G

2023 SLAUGHTERER SURVEY

Q1 What county do you operate in?

Answered: 3 Skipped: 0



ANSWER CHOICES	RESPONSES	
Grays Harbor	0.00%	0
King	0.00%	0
Lewis	33.33%	1
Mason	0.00%	0
Pierce	33.33%	1
Snohomish	33.33%	1
Thurston	0.00%	0
Other (please specify)	0.00%	0
TOTAL		3

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

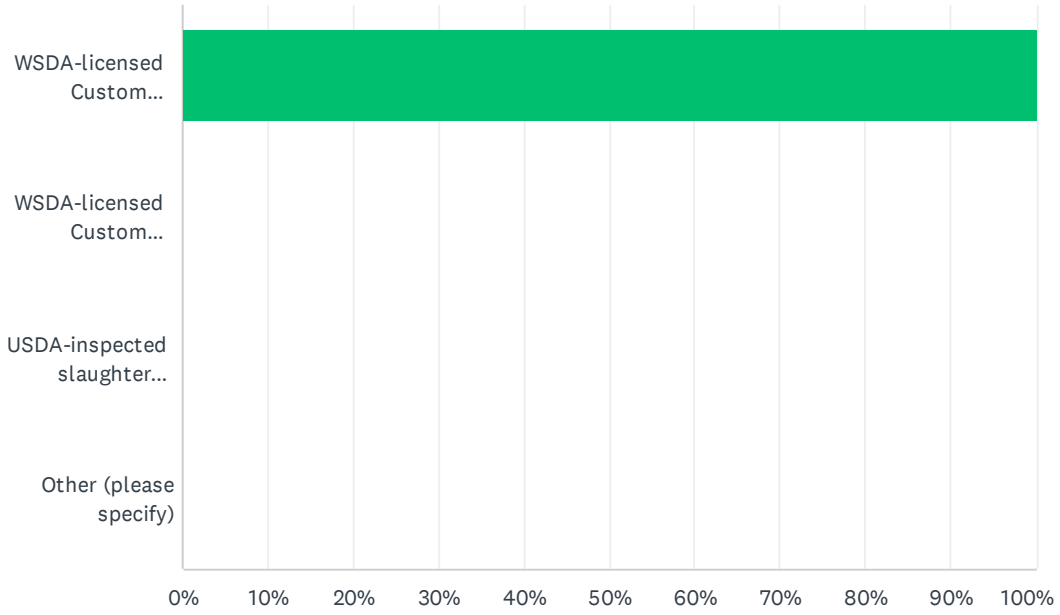
Q2 How many years have you been in business?

Answered: 3 Skipped: 0

#	RESPONSES	DATE
1	15	4/17/2023 9:17 AM
2	10	4/10/2023 11:15 AM
3	2	3/23/2023 5:15 PM

Q3 What type of WSDA or USDA licensed business are you?Check all that apply.

Answered: 3 Skipped: 0



ANSWER CHOICES	RESPONSES	
WSDA-licensed Custom Slaughterer (on-farm kill)	100.00%	3
WSDA-licensed Custom Slaughter Establishment	0.00%	0
USDA-inspected slaughter establishment	0.00%	0
Other (please specify)	0.00%	0
Total Respondents: 3		

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

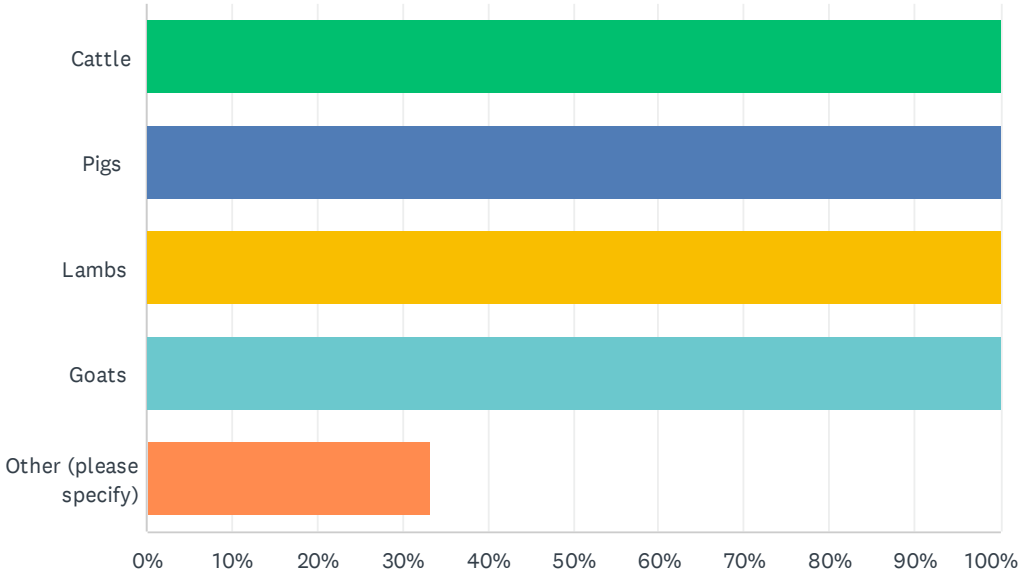
Q4 How many unique farm/ranch clients do you serve annually?

Answered: 3 Skipped: 0

#	RESPONSES	DATE
1	200	4/17/2023 9:17 AM
2	impossible to answer - hundreds?	4/10/2023 11:15 AM
3	300	3/23/2023 5:15 PM

Q5 What type of animals do you slaughter?Check all that apply.

Answered: 3 Skipped: 0



ANSWER CHOICES	RESPONSES	
Cattle	100.00%	3
Pigs	100.00%	3
Lambs	100.00%	3
Goats	100.00%	3
Other (please specify)	33.33%	1
Total Respondents: 3		

#	OTHER (PLEASE SPECIFY)	DATE
1	buffalo	4/17/2023 9:17 AM

Q6 How many animals did you slaughter in 2021?Fill in processing numbers for all that apply.

Answered: 3 Skipped: 0

ANSWER CHOICES	RESPONSES	
Cattle	66.67%	2
Pigs	66.67%	2
Lambs	66.67%	2
Goats	66.67%	2
Other (please specify type of animal)	33.33%	1

#	CATTLE	DATE
1	hundreds	4/10/2023 11:15 AM
2	400	3/23/2023 5:15 PM
#	**PIGS**	**DATE**
1	hundreds	4/10/2023 11:15 AM
2	200	3/23/2023 5:15 PM
#	**LAMBS**	**DATE**
1	hundreds	4/10/2023 11:15 AM
2	150	3/23/2023 5:15 PM
#	**GOATS**	**DATE**
1	hundreds	4/10/2023 11:15 AM
2	20	3/23/2023 5:15 PM
#	**OTHER (PLEASE SPECIFY TYPE OF ANIMAL)**	**DATE**
1	buffalo - 2	4/17/2023 9:17 AM

Q7 How many animals did you slaughter in 2022?Fill in processing numbers for all that apply.

Answered: 3 Skipped: 0

ANSWER CHOICES	RESPONSES	
Cattle	100.00%	3
Pigs	66.67%	2
Lambs	66.67%	2
Goats	66.67%	2
Other (please specify type of animal)	0.00%	0

#	CATTLE	DATE
1	150	4/17/2023 9:17 AM
2	too many to count: kent, forks, port angeles, woodland, montesano, etc.	4/10/2023 11:15 AM
3	400	3/23/2023 5:15 PM
#	**PIGS**	**DATE**
1	50	4/17/2023 9:17 AM
2	200	3/23/2023 5:15 PM
#	**LAMBS**	**DATE**
1	30	4/17/2023 9:17 AM
2	150	3/23/2023 5:15 PM
#	**GOATS**	**DATE**
1	20	4/17/2023 9:17 AM
2	20	3/23/2023 5:15 PM
#	**OTHER (PLEASE SPECIFY TYPE OF ANIMAL)**	**DATE**
	There are no responses.	

Q8 What is your average daily slaughter count?Fill in processing numbers for all that apply.

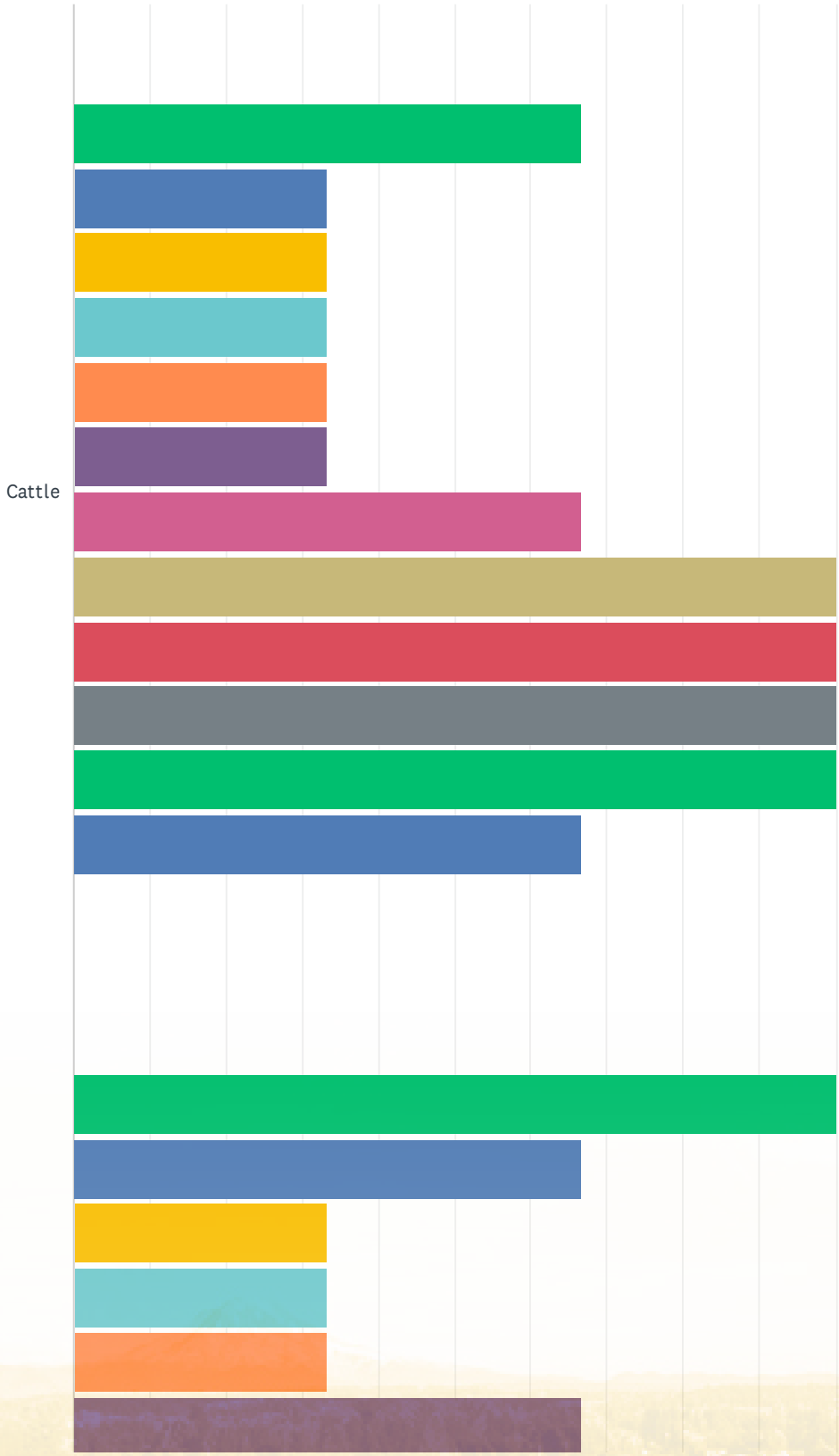
Answered: 3 Skipped: 0

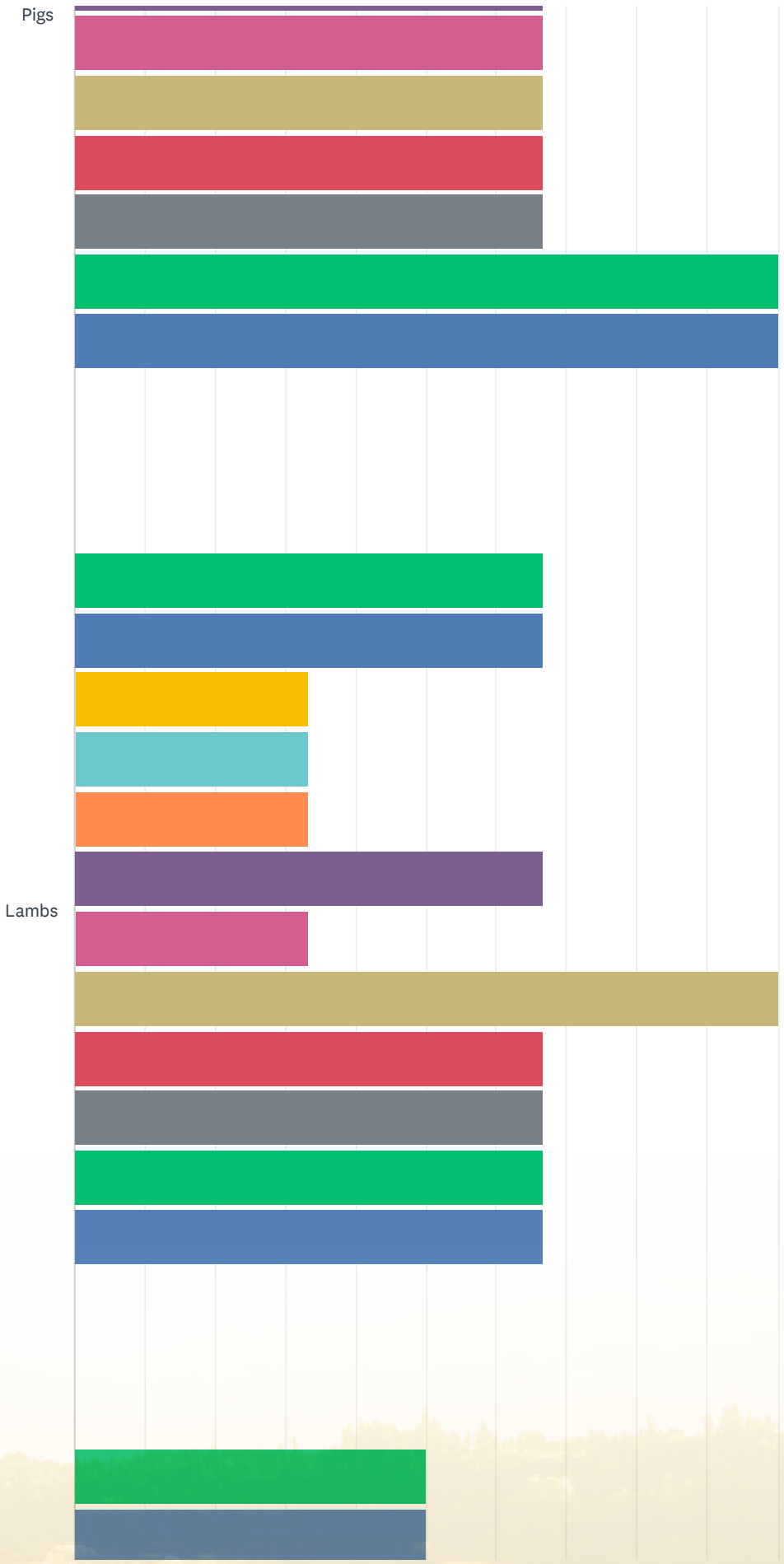
ANSWER CHOICES	RESPONSES	
Cattle	100.00%	3
Pigs	100.00%	3
Lambs	66.67%	2
Goats	66.67%	2
Other (please specify type of animal)	0.00%	0

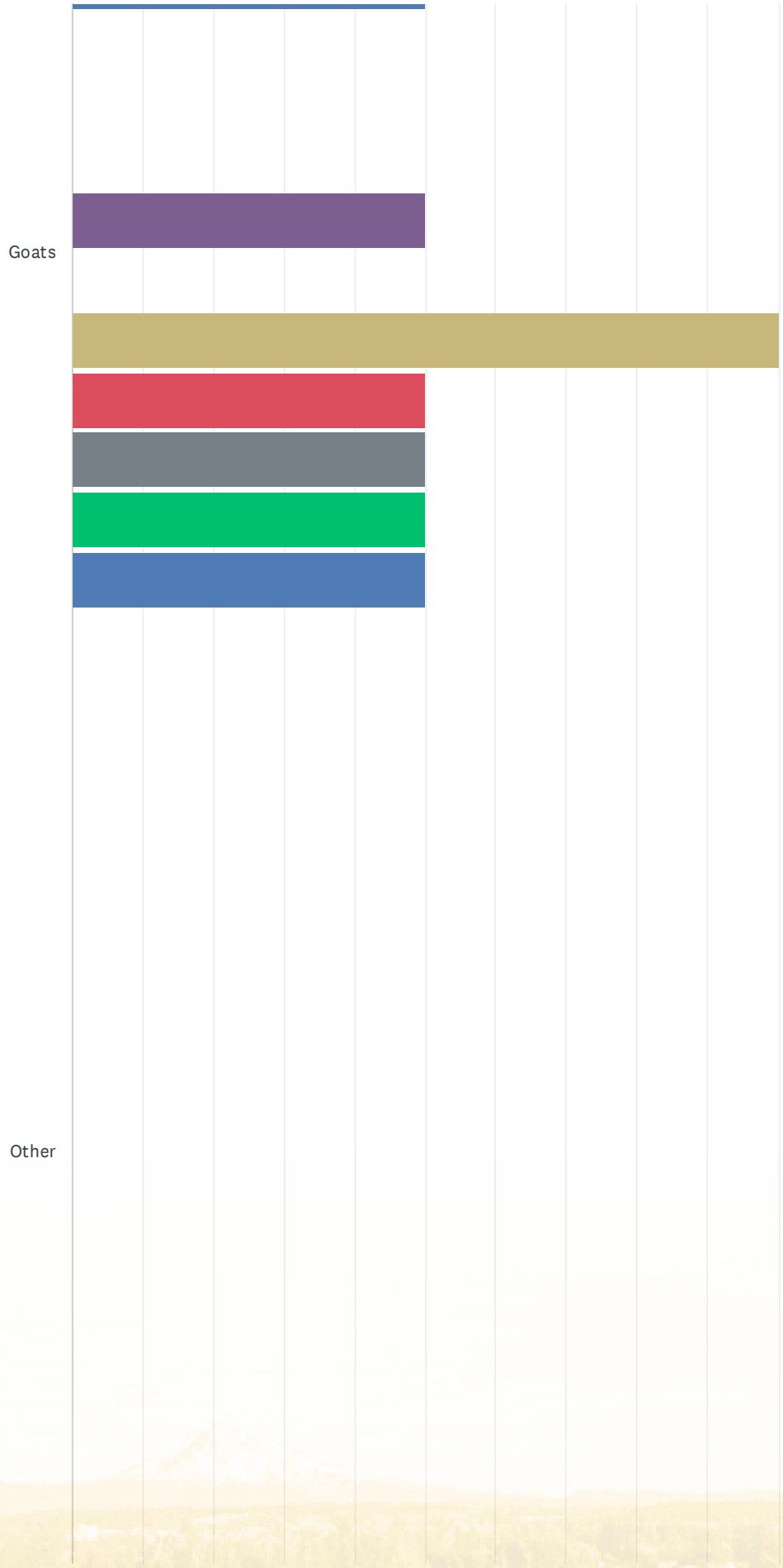
#	CATTLE	DATE
1	7-max	4/17/2023 9:17 AM
2	25	4/10/2023 11:15 AM
3	6	3/23/2023 5:15 PM
#	**PIGS**	**DATE**
1	8	4/17/2023 9:17 AM
2	40	4/10/2023 11:15 AM
3	2	3/23/2023 5:15 PM
#	**LAMBS**	**DATE**
1	15	4/17/2023 9:17 AM
2	4	3/23/2023 5:15 PM
#	**GOATS**	**DATE**
1	12	4/17/2023 9:17 AM
2	2	3/23/2023 5:15 PM
#	**OTHER (PLEASE SPECIFY TYPE OF ANIMAL)**	**DATE**
	There are no responses.	

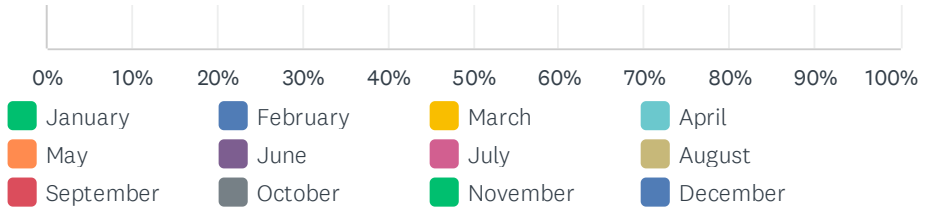
Q9 What is your peak time of year for the animals that you slaughter? Check all months that apply.

Answered: 3 Skipped: 0




Pigs
Lambs

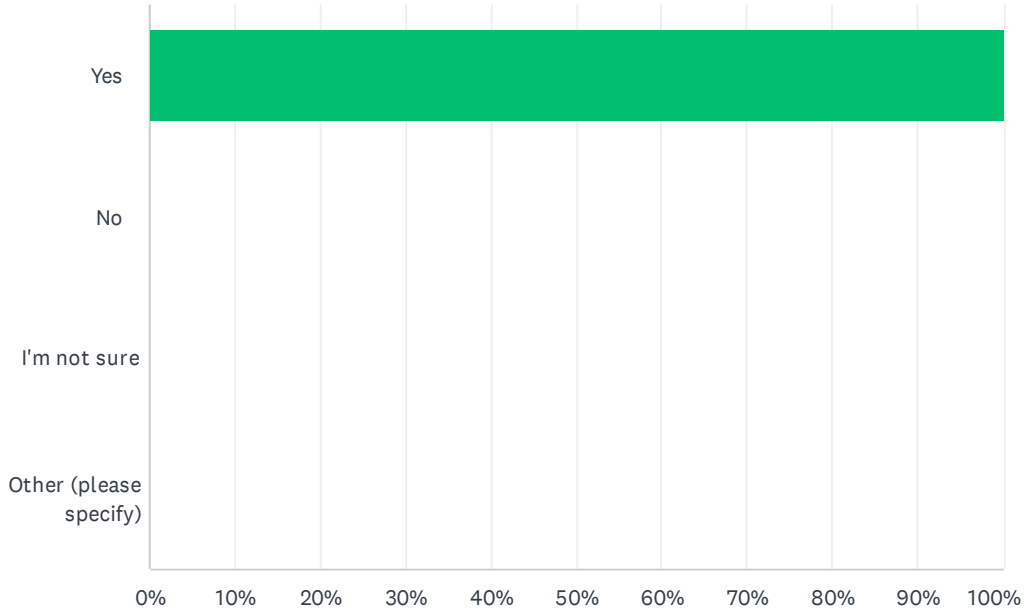

Goats
Other



	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER
Cattle	66.67% 2	33.33% 1	33.33% 1	33.33% 1	33.33% 1	33.33% 1	66.67% 2	100.00% 3	100.00% 3	100.00% 3
Pigs	100.00% 3	66.67% 2	33.33% 1	33.33% 1	33.33% 1	66.67% 2	66.67% 2	66.67% 2	66.67% 2	66.67% 2
Lambs	66.67% 2	66.67% 2	33.33% 1	33.33% 1	33.33% 1	66.67% 2	33.33% 1	100.00% 3	66.67% 2	66.67% 2
Goats	50.00% 1	50.00% 1	0.00% 0	0.00% 0	0.00% 0	50.00% 1	0.00% 0	100.00% 2	50.00% 1	50.00% 1
Other	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0

Q10 Is waste management a challenge for your business today?Examples of waste management include wastewater, rendering, permitting and inspection issues, disposal options (rendering, landfill, collection), etc.

Answered: 3 Skipped: 0

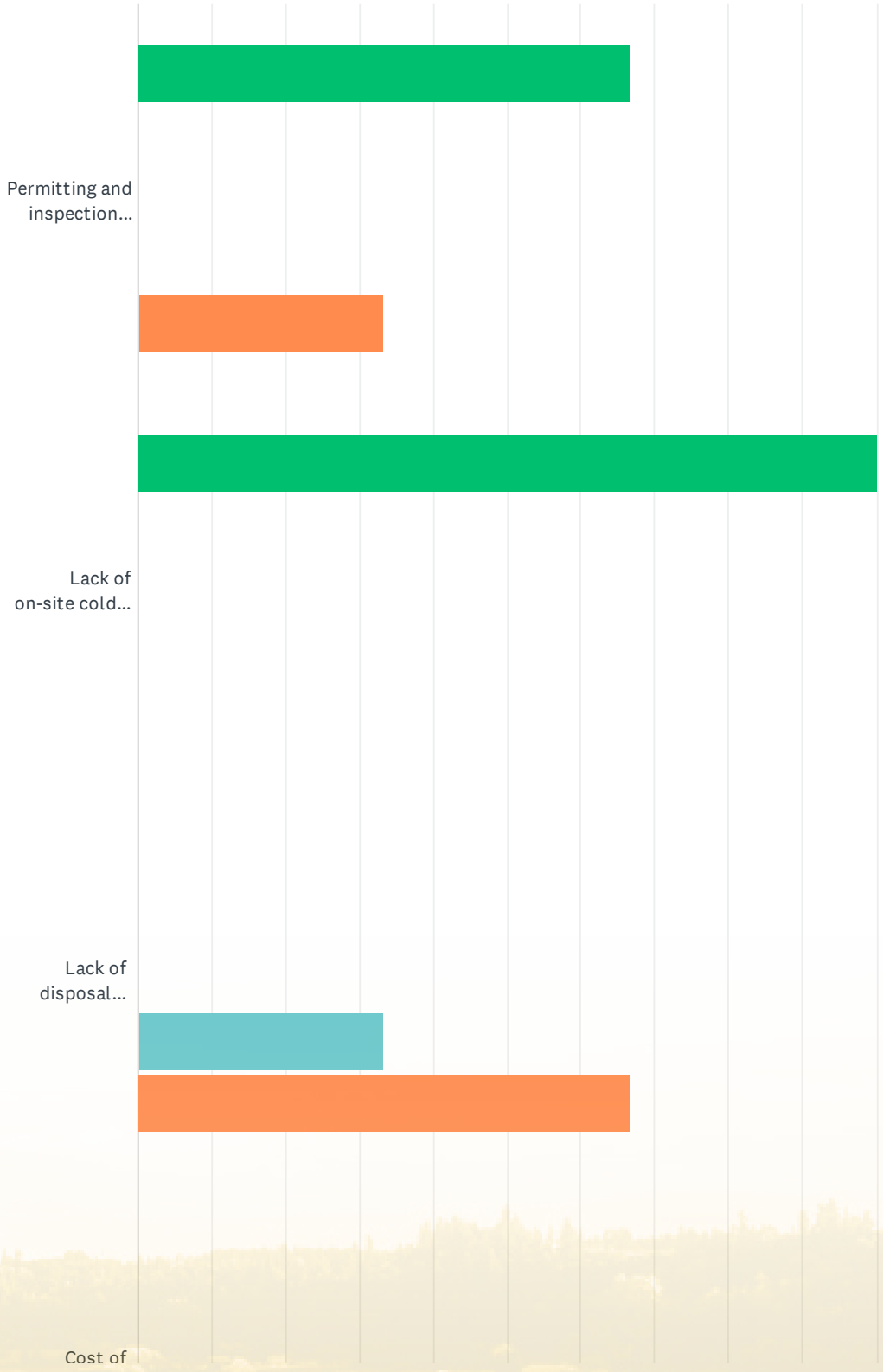


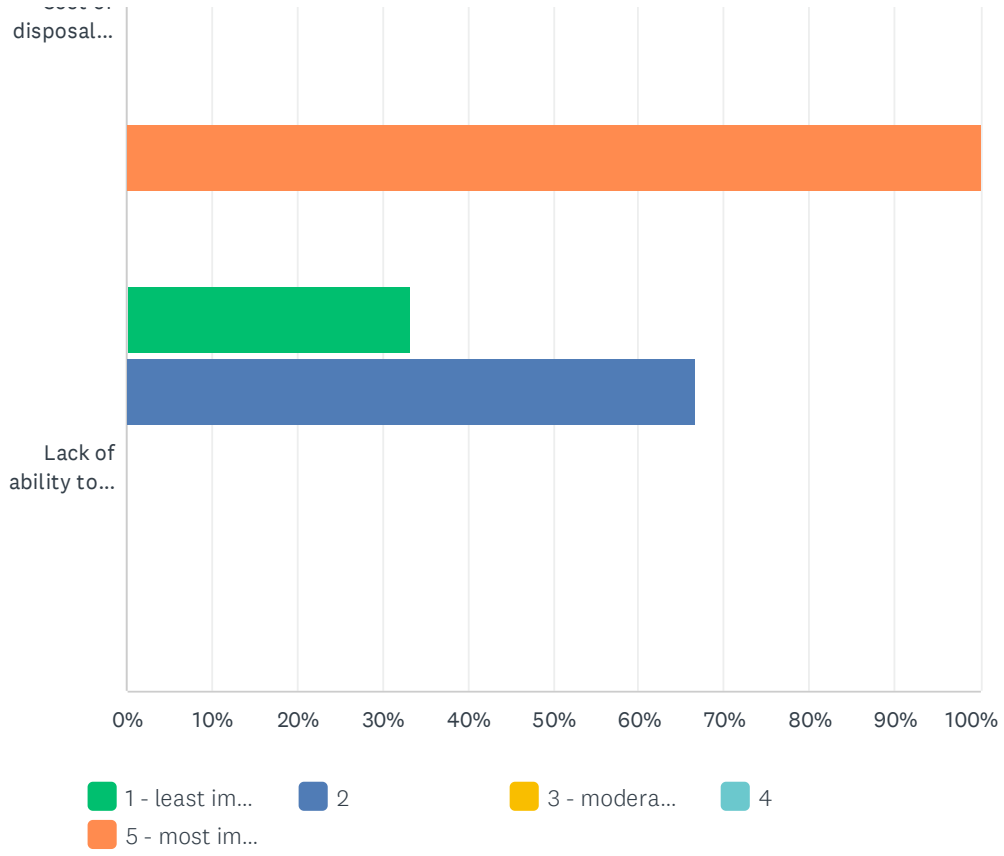
ANSWER CHOICES	RESPONSES	
Yes	100.00%	3
No	0.00%	0
I'm not sure	0.00%	0
Other (please specify)	0.00%	0
TOTAL		3

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q11 Of the waste management challenges listed below, rate the following concerns on a scale of 1 to 5, with 1 being least important and 5 being most important.

Answered: 3 Skipped: 0





	1 - LEAST IMPORTANT	2	3 - MODERATELY IMPORTANT	4	5 - MOST IMPORTANT	TOTAL
Permitting and inspection issues	66.67% 2	0.00% 0	0.00% 0	0.00% 0	33.33% 1	3
Lack of on-site cold storage to hold waste before disposal	100.00% 3	0.00% 0	0.00% 0	0.00% 0	0.00% 0	3
Lack of disposal options	0.00% 0	0.00% 0	0.00% 0	33.33% 1	66.67% 2	3
Cost of disposal options	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 3	3
Lack of ability to leave waste with farmer or rancher for on-farm composting or burial	33.33% 1	66.67% 2	0.00% 0	0.00% 0	0.00% 0	3

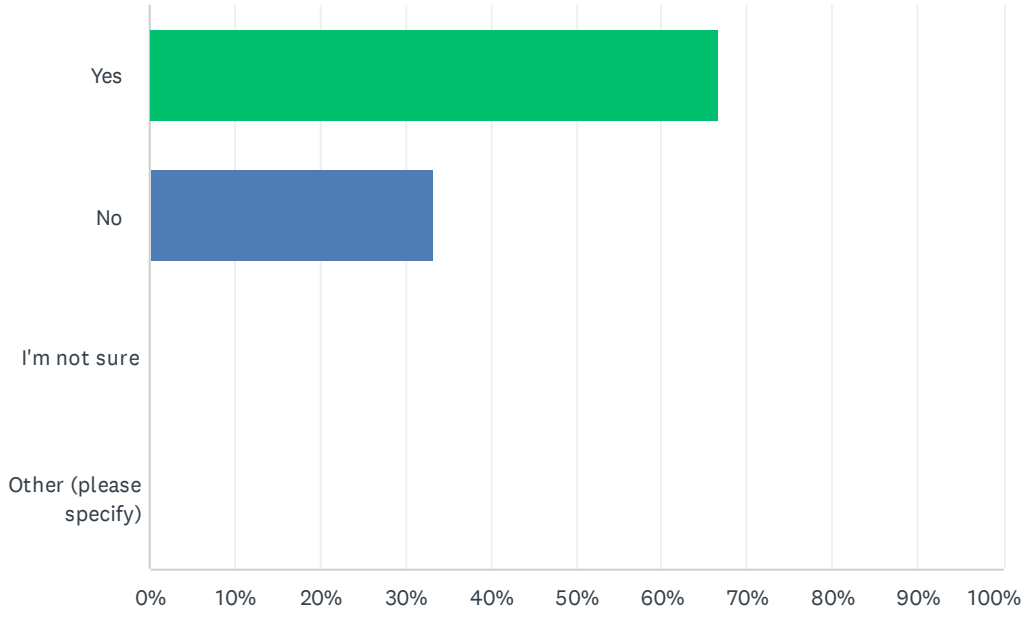
Q12 Are there any other waste management challenges that are a concern for your business today?

Answered: 3 Skipped: 0

#	RESPONSES	DATE
1	no	4/17/2023 9:19 AM
2	no	4/10/2023 11:16 AM
3	Sheep and goat rendering has to go into the garbage.	3/23/2023 5:17 PM

Q13 Do you have facility (on-farm or establishment) challenges that make it difficult to increase your slaughter capacity?

Answered: 3 Skipped: 0

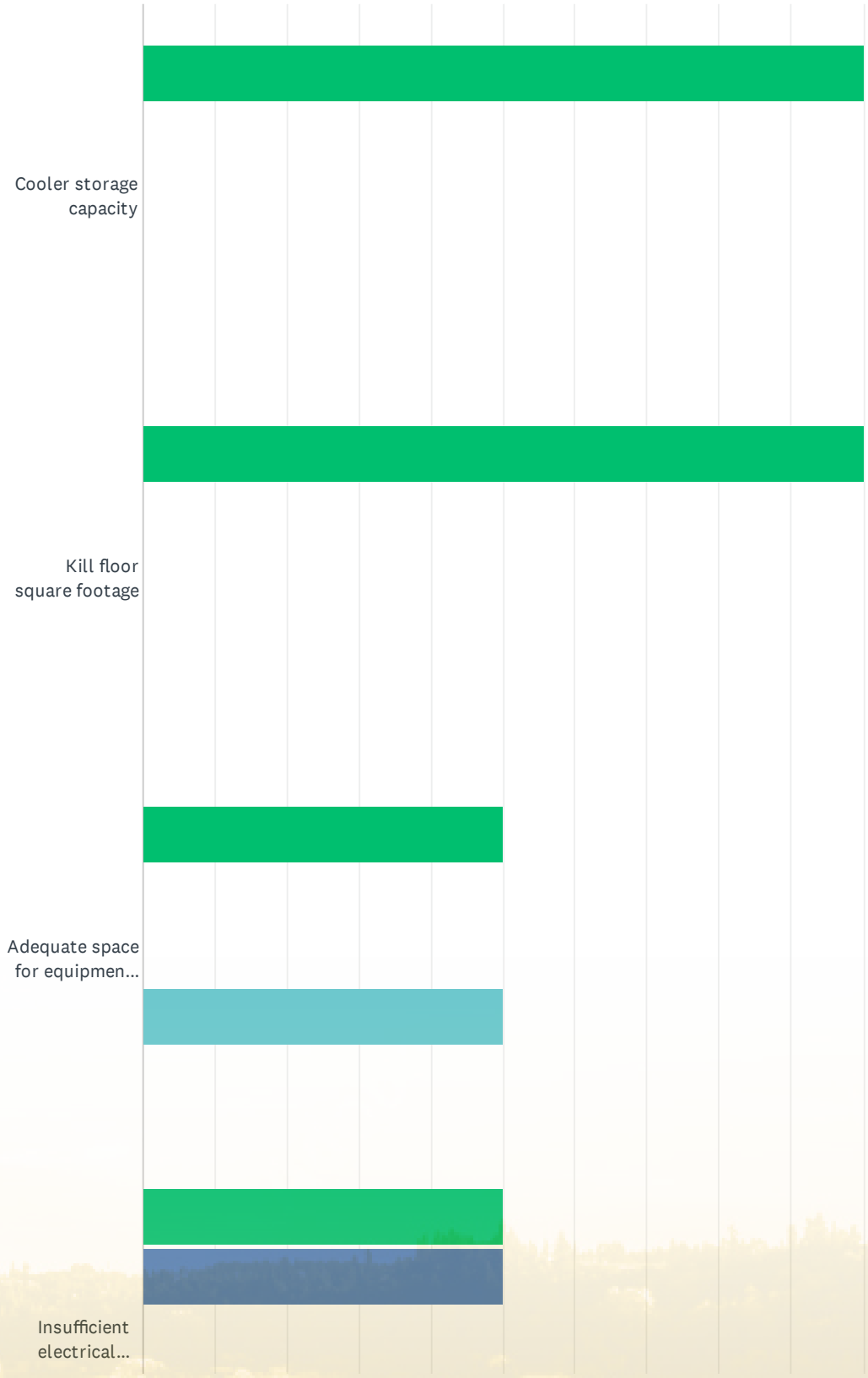


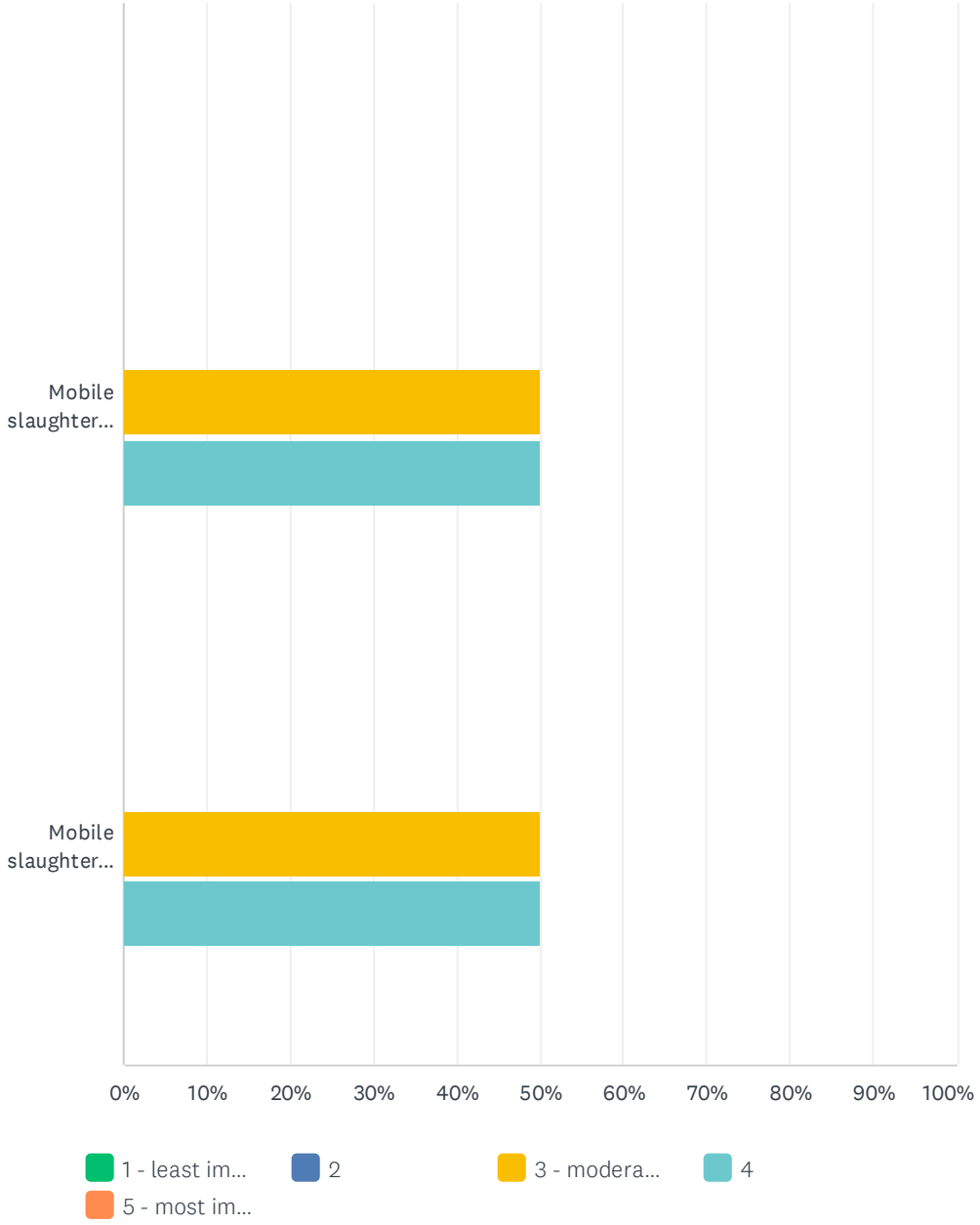
ANSWER CHOICES	RESPONSES	
Yes	66.67%	2
No	33.33%	1
I'm not sure	0.00%	0
Other (please specify)	0.00%	0
TOTAL		3

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q14 Of the facility challenges listed below, rate the following concerns on a scale of 1 to 5, with 1 being least important and 5 being most important.

Answered: 2 Skipped: 1




Mobile slaughter...
Mobile slaughter...
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
1 - least im...
2
3 - modera...
4
5 - most im...

	1 - LEAST IMPORTANT	2	3 - MODERATELY IMPORTANT	4	5 - MOST IMPORTANT	TOTAL
Cooler storage capacity	100.00% 2	0.00% 0	0.00% 0	0.00% 0	0.00% 0	2
Kill floor square footage	100.00% 2	0.00% 0	0.00% 0	0.00% 0	0.00% 0	2
Adequate space for equipment upgrades	50.00% 1	0.00% 0	0.00% 0	50.00% 1	0.00% 0	2
Insufficient electrical capacity/need for electrical upgrades	50.00% 1	50.00% 1	0.00% 0	0.00% 0	0.00% 0	2
Mobile slaughter operation – producer site accessibility (ease of access to site)	0.00% 0	0.00% 0	50.00% 1	50.00% 1	0.00% 0	2
Mobile slaughter operation – producer site usability (facilities and animal handling infrastructure)	0.00% 0	0.00% 0	50.00% 1	50.00% 1	0.00% 0	2

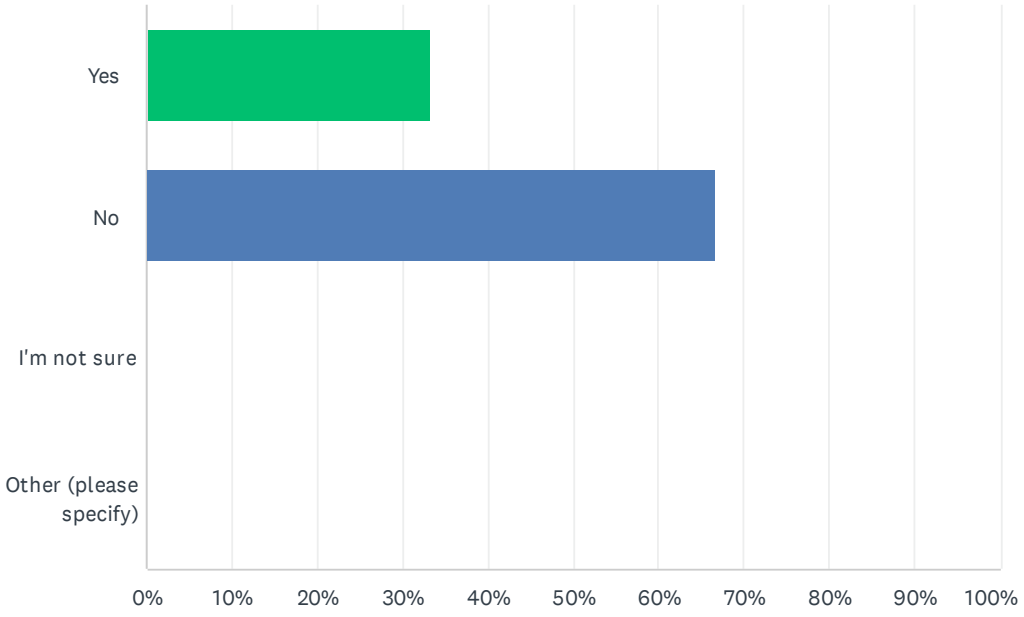
Q15 Are there any other facility challenges that make it difficult to increase your capacity?

Answered: 2 Skipped: 1

#	RESPONSES	DATE
1	meat shops are good for access	4/17/2023 9:22 AM
2	farmer organization of sites; fixed splitting saw for halving carcass	4/10/2023 11:20 AM

Q16 Do you have equipment challenges that make it difficult to increase your capacity?

Answered: 3 Skipped: 0

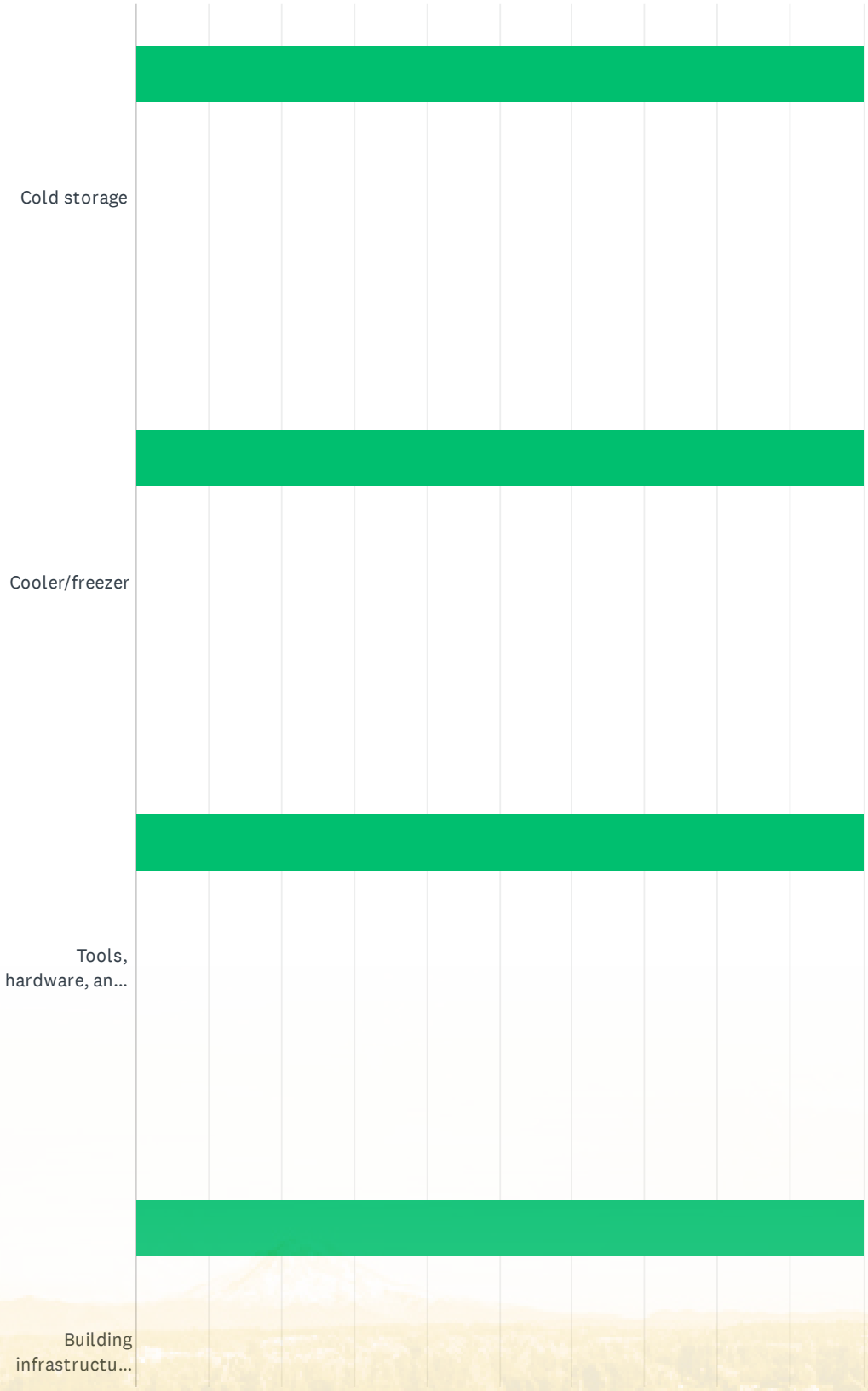


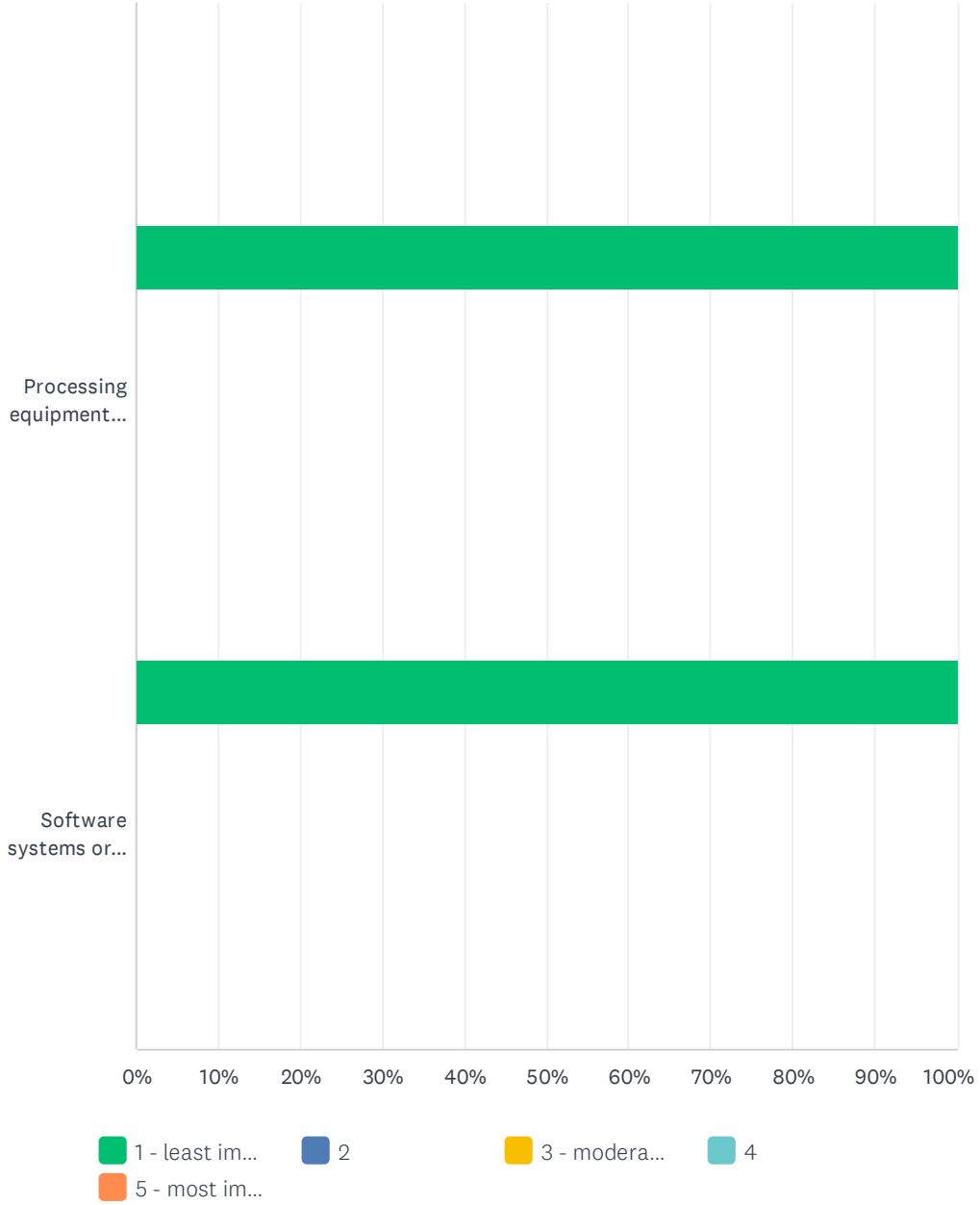
ANSWER CHOICES	RESPONSES	
Yes	33.33%	1
No	66.67%	2
I'm not sure	0.00%	0
Other (please specify)	0.00%	0
TOTAL		3

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q17 Of the equipment challenges listed below, rate the following needs on a scale of 1 to 5, with 1 being least important and 5 being most important.

Answered: 1 Skipped: 2





	1 - LEAST IMPORTANT	2	3 - MODERATELY IMPORTANT	4	5 - MOST IMPORTANT	TOTAL
Cold storage	100.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	1
Cooler/freezer	100.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	1
Tools, hardware, and equipment, (saws, knives, scales)	100.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	1
Building infrastructure (hooks, hanging rails)	100.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	1
Processing equipment (grinders, smokers, vacuum sealers, etc.)	100.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	1
Software systems or other business management tools	100.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	1

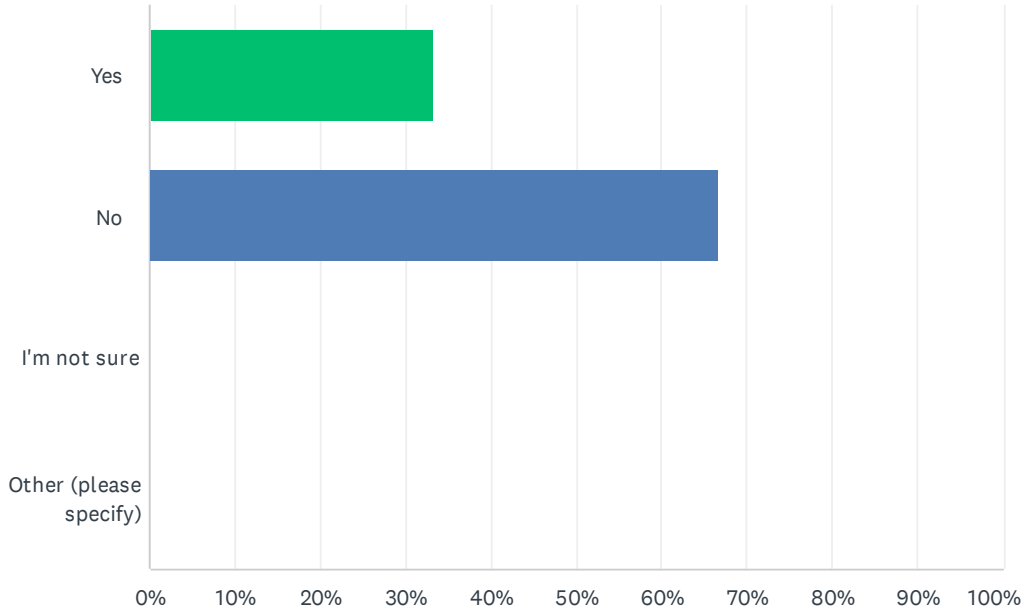
Q18 Are there any other equipment challenges that make it difficult to increase your capacity?

Answered: 1 Skipped: 2

#	RESPONSES	DATE
1	moving big trucks around, no scales to avoid conflict	4/10/2023 11:22 AM

Q19 Do you have business management challenges that make it difficult to increase your capacity? This includes labor, business planning, and financing.

Answered: 3 Skipped: 0

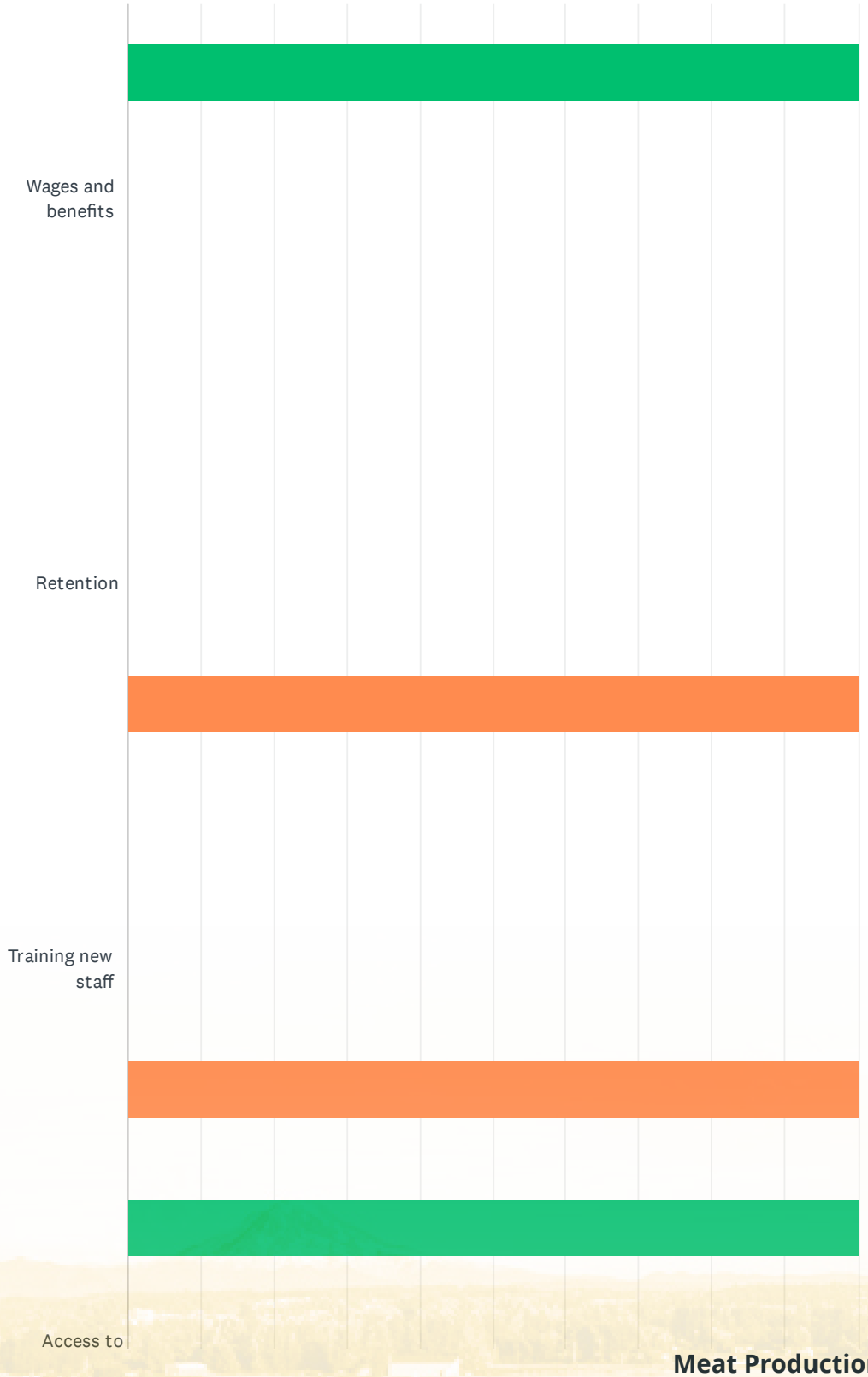


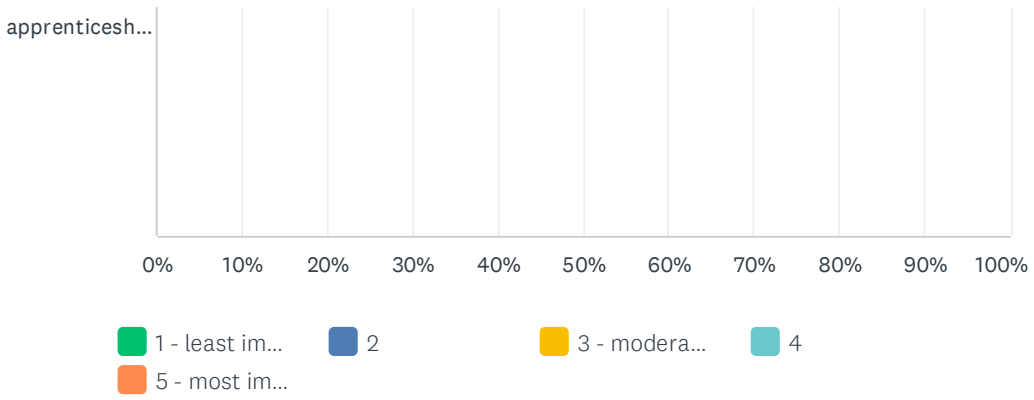
ANSWER CHOICES	RESPONSES	
Yes	33.33%	1
No	66.67%	2
I'm not sure	0.00%	0
Other (please specify)	0.00%	0
TOTAL		3

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q20 Of the business management challenges listed below, rate the following concerns on a scale of 1 to 5, with 1 being least important and 5 being most important.

Answered: 1 Skipped: 2





	1 - LEAST IMPORTANT	2	3 - MODERATELY IMPORTANT	4	5 - MOST IMPORTANT	TOTAL
Wages and benefits	100.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	1
Retention	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 1	1
Training new staff	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 1	1
Access to apprenticeship programs	100.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	1

Q21 Are there any other business management challenges that make it difficult to increase your capacity?

Answered: 1 Skipped: 2

#	RESPONSES	DATE
1	Slow times of the year	3/23/2023 5:19 PM

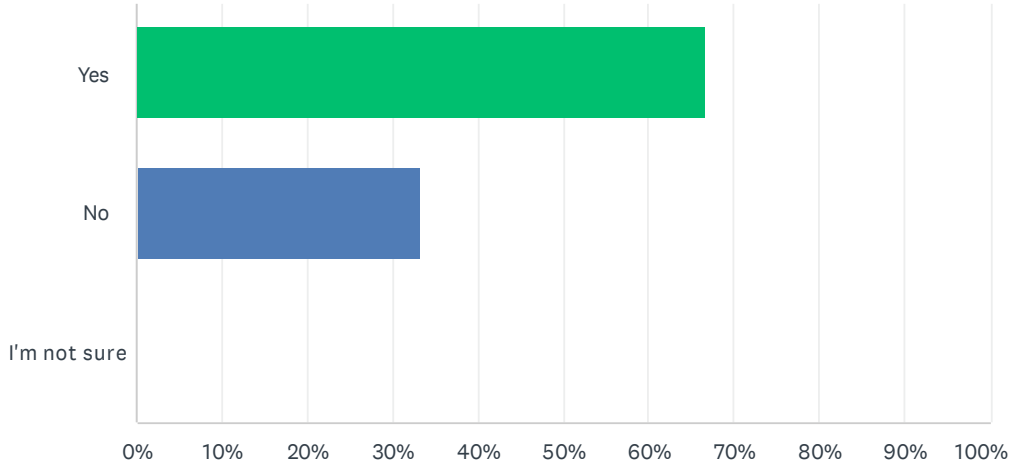
Q22 Besides waste management, facility, equipment, and business management, are there any additional barriers to increasing your capacity?

Answered: 3 Skipped: 0

#	RESPONSES	DATE
1	no	4/17/2023 9:24 AM
2	no - only way to increase is another truck, which isn't in the plan	4/10/2023 11:25 AM
3	No	3/23/2023 5:21 PM

Q23 Will you be transitioning your business in the next 5 years?

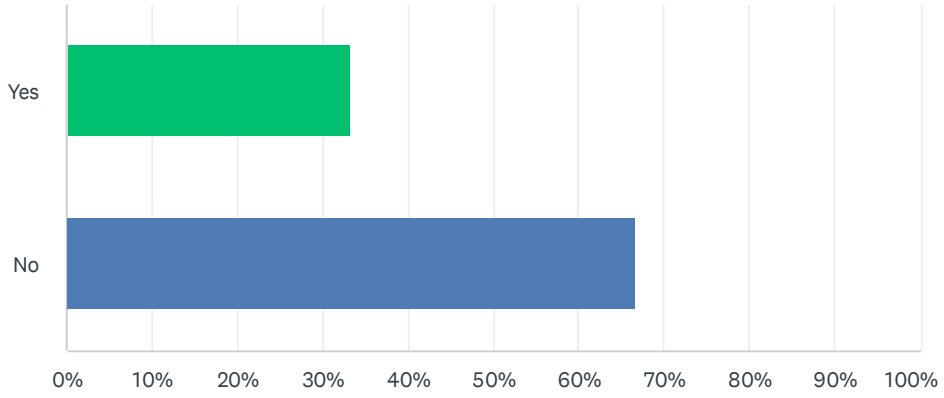
Answered: 3 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	66.67%	2
No	33.33%	1
I'm not sure	0.00%	0
TOTAL		3

Q24 Would you like to offer new services to your customers (i.e. halal, kosher, livestock types)?

Answered: 3 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	33.33%	1
No	66.67%	2
TOTAL		3

Q25 What new services would you like to offer to your customers?

Answered: 1 Skipped: 2

#	RESPONSES	DATE
1	alternative species would be ok as long as covered by license	4/17/2023 9:25 AM

Q26 If you had $100,000 to increase your slaughtering capacity, what would you spend it on and how much would your capacity increase?

Answered: 3 Skipped: 0

#	RESPONSES	DATE
1	new truck - box and everything - road wear	4/17/2023 9:31 AM
2	back-up equipment and generators/air compressors to reduce downtime. beef tags on hand.	4/10/2023 11:31 AM
3	Advertising to let farmers know that we are available to assist them.	3/23/2023 5:24 PM

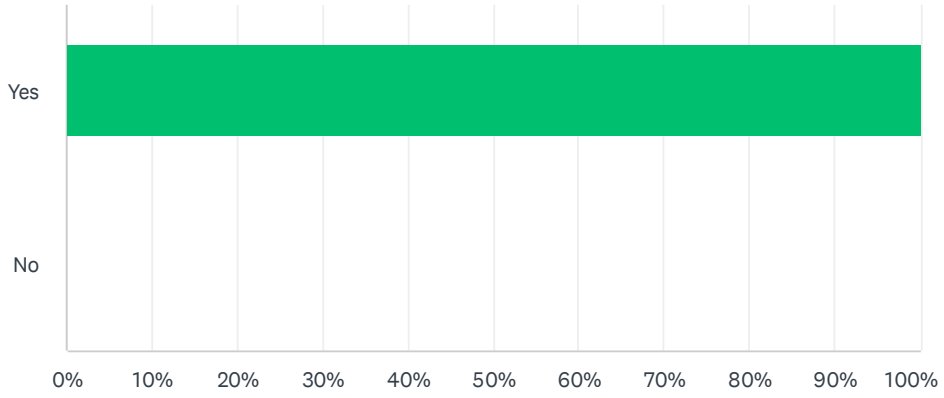
Q27 Are there additional solutions that would address your barriers?

Answered: 3 Skipped: 0

#	RESPONSES	DATE
1	better handling and preparation by farmers; aggregation, especially when trying to hit dock times at butcher shops - travel times are tough	4/17/2023 9:31 AM
2	waste mgmt to get to approved sites	4/10/2023 11:31 AM
3	I need more animals to kill and cut.	3/23/2023 5:24 PM

Q30 Would you like to join us for a focus group to talk further with Pierce and Thurston counties about the barriers you face and potential solutions?

Answered: 3 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	100.00%	3
No	0.00%	0
TOTAL		3

APPENDIX H

2022 PIERCE COUNTY PRODUCER SURVEY

Species	Acres grazed - self	Acres grazed - leased to others	Acres in hay - self	Acres in hay - leased to others	Animal units (each unit represents an estimate of total livestock, 1au=1,000 lbs	Beef	Pork	Lamb	Goat	Other Red	Chicken	Other Poultry	Breed(s)	Feed types	Target slaughter dates	Slaughter facilities used	Processors used	2020 slaughter	2021 slaughter	2022 slaughter (proj.)	2023 slaughter (proj.)	Lease land from others?	Employees
cattle	320	0	0	0	100?	140-160							Angus	Grazing & Hay	Every 4 weeks year-round	Puget Sound Processing (Centralia)	Heritage Meats (Rochester)	52	57	55	38	no	1
pigs, lambs, poultry, cattle	27	0	0	0		8	30	20		75 (Rabbit)	2400	300 (Turkey)	Beef- Murray Grey; Pork- mixed; Lamb-Finn Sheep; Chicken-Freedom Ranger; Turkey-BB & Heritage	Grass (Beef & Lamb); Pellets (Rabbit); Non-GMO for all others	Beef-Fall; Pork-year-round; Lamb-Fall; Rabbits-year-round; Chicken-Summer-Fall; Turkeys-	On-farm; Chicken, Lamb, Rabbits; Ron Curtis mobile butcher; Puget Sound Processing (USDA)	On-farm; Mtn View Meats; Heritage Meats	Pork=30; Lamb=20; Chicken=2000; Turkey=100	Pork=30; Lamb=20; Rabbits=50; Chicken=2200; Turkey=200	Beef=4; Pork=30; Lamb=20; Rabbit=100; Chicken=2400; Turkey=300	Beef=4; Pork=30; Lamb=20; Rabbit=100+; Chicken=2600; Turkey=300	no	8
cattle	730					1000+							Angus	Grass	summer *	Five Rivers (ID); AgriBeef (Moses Lake); Simplot Feeders (Burbank, WA)		650-700	650-700	1000	1000	no	
cattle	35		20			25							Hereford; Hereford x Angus	own hay; grain in feeders	fall	Mike Erickson	Double T Meats	4	5	8	6	no	3
cattle	55					33							Angus, Angus x Hereford	grass	Sept	A&L Farm Slaughter; Mike Erickson Slauehterine	Mtn View Meats & Sausage	14	25	15	15	no	2
cattle, pork, lamb, goat, chicken, turkey	30	60				5	8	30	15 (pets)		25 (layers)	3	Angus (cattle); Kune Kune (pork); Friesian (lamb); turkeys	grass, grain	Oct (cattle); Sept-sales (lamb); Nov (turkey); varies (pork)	?	?	2 cattle; 70 chickens		3 cattle; 1 prok; 2 lamb	2 cattle; 1 pork; 2 lamb; 70 chickens	no	1
cattle	75	50	25	55		30							Angus cross	hay, grass	April	self	self		1		1	yes, only family	1
cattle	30		20		75.9	17							Corriente			Lind's Meats	Lind's Meats	10	6	?	?	not anymore	1
cattle	50		40		30+	59							Angus	grass, hay	Sept-Nov	Mike Ericson	Mt View Meat & Sausage	1?	1?	1?	1?	no	3
			60																				3
cows					75																		
cattle	15		5		22.8	13							Hereford	Hay, pasture grass	Aug-Sept	Mike Ericson	Double T Meats	4	4	4	4	3 acres, but likely not after 2022	2
sheep	11							40 +/-					Barbados Blackbelly	local hay; rgain w/ 12% protein	random	DIY	Butcher Boys (South Hill)	1	3	3	4	n	3
cattle	30		30			18							Angus	Hay		Ron Curtis	Butcher Boys	4	4	4	4	no	1
cattle, pork, goat, chicken	10	45					1		4				goat: Nigerian (not for slaughter)	hay	already slaughtered 1 pig this season		Stewart's Meats		1	Beef=2; Pork=2;Chicken=10	Beef=2; Pork=2;Chicken=10	no	4
cattle	4				2.625	8								Grass	October	Erickson's Farm Slaughter		6	6	8	8+	4 acres - Schumaker (0317071010)	2
none				8																			
cattle, chickens	50		40			varies					varies		Hereford x Angus	grass, grain	fall	Mike Erickson	Stewart Meats	4 cattle, 30 chickens	3 cattle, 10 chickens	do not overwinter stock - slaughter in fall, but don't know year-to-year how many head		no	6 (all family)
				hay now, used to have cattle																			
cattle	200+		varies	varies		200+							any									yes	
sheep, llama, goat, chicken, duck	30						4 (every few years)	140	130 (Nigerian dwarf & lamancha; milk goats)				Black Welsh Mtn Sheep (heritage)	pasture; hay offseason; milking goats get grain	target at 10 months' age; shifting this year	Puget Sound Mobile Slaughter (hogs use Farmstead Meatsmith)	Heritage Meats (hogs with Farmstead Meatsmith)	27	27	54	40-50	no	~7
lambs	17							40					Icelandic	pasture grass, local hay, alfalfa, sheep mineral	mid-November	Jerry & Ron Curtis	Mountain View Meats	10	20	15	15	no	4
cattle, goats, chickens	130		65			30 Angus; 8 Longhorn			30 Nubian		15 (layer hens)		Angus for beef, Longhorns for hobby	hay; hay + alfalfa for goats	cattle-Oct; goats-Oct	Mike Erickson	n/a					no	2
cattle	33				24	15							variety	grass, hay		Anderson (in Enumclaw)		9	13	2	1	no	2
cattle	20		35			10							red angus	grass, hay	fall	Chehalis Auction & Mike Erickson		6	2	3	?	no	1
lambs, chicken, turkey, eggs	15							Katadhin			layers	turkey - gamebird		alfalfa/grain for lamb; pellet for poultry	lamb-Nov/Dec	on-site slaughter	custom to butcher	12 lamb, 200 chicken, 28 turkey	14 lamb, 250 chicken, 28 turkey	16 lamb, 200 chicken, 30 turkey	?	yes - 10 acres (Cheryl Ourlette & Beverly Fries)	3
cattle	60		30			12							Angus		Nov-Feb (auction)			6	6	4	6	no	
cattle	120	150	100	80		150							Angus, Angus crosses	hay, grass, haylage, silage, grain	year-round, monthly	A&L Mobile Slaughter; Custom Meats (Tacoma Mobile Slaughter)-primary	Custom Meats Tacoma LLC (primary); Bear Ridge Smokehouse LLC	15	25	60	100	yes: 240 acres grazing (Roy); 200 acres hay (Lewis Co).	2
cattle	40		30			40							Angus	hay								no	1
			14		21											Mike Erickson	Double T Meats	0	0	0	0	no	1
cattle, goats	120		varies			13			10				Angus; Boer	pasture, hay, grains	September	none	none	5	5	5	5	no	2
cattle		300+				200							Santa Gertrudis	pasture									2
cattle	130		30			50							B/WF (?)	pasture, hay, silage	September	Home Meats (Shelton)	Home Meats	5	5	5	5	no	3
			15		33																	no	4
cattle	85		45			30							Limousin/Angus	alfalfa hay, pasture	?	self	self & Custom Meats	2	0	2	1	no	2
cattle	25		89			24							white-faced mix *(probably hereford or simmental)*					0	0	0	0	no, just family	0
cattle	50		50			80							Angus	hay, pasture	September			2	2	2	2	yes, 100 acres from family	3
cattle	25		25		23	20-30							Hereford mix	pasture, grain, alfalfa hay	sale prior to commercial slaughter	Erickson	Mtn. View Meats	1	1	1	1	no	2
cattle	30		30			28							Brangus	pasture, local hay	unk	n/a	n/a	0	0	0	0	no	1
highland cows & calves	100		40		25.29	60					20	up to 10	English beef breeds; Barred Rock & Cornish (chickens); ducks & turkeys	pasture & hay for cattle; range fed and DuMoore feed for poultry	Varies yearly, but target fall for cattle; fall for turkeys; chickens occasionally (xmas)	Erickson	Mtn. View Meats, Double T Meats & Butcher Boys	10	10	10	10	no	2

APPENDIX I

2019 WSU PENINSULA SURVEY

2019 Meat Producer Survey Result Summary

77 Respondents – 63 currently derive income from the sale of red meat, 14 do not currently but may in the future

Responses by county:

Clallam – 13
Island – 2
Jefferson – 13
King – 15
Kitsap – 18
Kittitas – 1
Mason – 1
Pierce – 6
San Juan – 4
Skagit – 2
Snohomish – 1
Thurston – 1

Of those not currently producing red meat for sale, the following reasons were cited:

USDA processing not close enough – 8
Currently working another job – 4
Not profitable – 2
Lack access to farmland – 1
Regulations too prohibitive – 1

Of the 63 active producers:

31 produce beef
36 produce pork
27 produce lamb
14 produce goat
2 produce bison or yak

30 produce 1 type of red meat
22 produce 2 types of red meat
8 produce 3 types of red meat
3 produce 4 types of red meat

This survey did not include the production of poultry or rabbit

26 currently use USDA-inspected slaughter and processing services
26 do not currently use USDA-inspected slaughter and processing services
11 have used USDA-inspected slaughter and processing services in the past but do not currently

Of the 26 producers that currently use USDA-inspected slaughter services, the following services are used:

Island Grown Farmers Cooperative – 8
Malco's Buxton Meats – 6
North Cascade Meats – 2
Puget Sound Processors – 10
Smokey Ridge Meats – 1
LPCA – 1
Mount Angel Meat Company – 1

Of the 26 producers that currently use USDA-inspected slaughter services:

6 are satisfied with their current USDA-inspected slaughter services
15 are partly satisfied
5 are not satisfied
81% are not fully satisfied with service

The following issues were cited as sources of dissatisfaction:
Not close enough – 15 – 58% of respondents
Scheduling is difficult – 15 – 58% of respondents
Too expensive – 7 – 27% of respondents

Other comments about dissatisfaction:

- Not enough capacity
- With the distance we try to clump our animals making it harder to manage the quantities of meat in our storage
- Lack of pig scalding option. No good options for changing slaughter services if we are unsatisfied
- Constant issues with making sure we get all our product back, proper labeling, getting all our questions answers to our satisfaction and more.
- In order for you to use any processor other than Heritage Meats you have to pay an arm and a leg!!
- Reliability. Would like the slaughter to be connected with the processor for a more seamless operation.
- We cannot get all parts of the animals back, which are of high value to us as a small farm. For example, bones (all customers), sheep heads (Muslim market), hooves (pet food market), organ meats (all customers). These are all products that customers have requested of us, that we personally would like to have, and that we can use as foods for other areas of our farm. It is infuriating that we cannot have the animals that we raised and are paying to have this service done on for our use.
- Would like to have access to pig scalding facility.
- We are limited by space and aging equipment. There is a huge need for expanded services such as smoking, curing, ready to eat, and retail sales.
- the manner in which the animals are handled after slaughter, no scalding, basic butchery.
- The price is twice as high as Oregon. PSP only operates a few days a month. Ridiculously difficult to get on the schedule. This public asset, the MPU, is way underutilized. That hurts our area meat farmers. PSP should have improved with their new location but they only operated four

days in the month of May. Not okay. Not reliable. I have lost restaurant customers due to their concerns about my supply. I have to harvest my animals below or above weight because I simply cannot get an appointment for kill. Puget Sound Processing does not have a scalder. I lose customers if I need skin on pork or I have to go to Oregon.

Of the producers who do produce red meat for sale, but do not sell USDA-inspected meat, the following reasons were cited:

USDA slaughter services not close enough – 26
Prefer not to transport livestock – 18
Too expensive – 20
Not interested in USDA-inspected sales – 2
Don't know about available USDA slaughter services – 4

Other comments:

- Lost storage capacity
- No trailer
- Hasn't been an easily available option
- Too expensive to be worth it. The higher cost of transportation, slaughter, and cut and wrap can't be justified at our scale. Hamburger for example requires $3 per lb in expenses per lb of meat yielded from the process. As a rough comparison I can process through on the hoof sales at around a $120 slaughter fee and a $.60/lb cut and wrap putting fees at less than half of the USDA and with less hauling expense. Around the low $1/lb range on the meat yield. This pushes more farmers into skirting regulations and selling 'on the hoof' weather by the whole, half, or quarter animal
- Pierce Co Conservation District funded Mobile Slaughter Unit provided some early support has become primarily privatized and stationary. Mixed management had mixed results and quality. Also need access that supports animal welfare and slaughter.

If a new USDA-inspected slaughter service were available:

58 would consider using it
15 might consider using it
2 would not consider using it

Of the 73 respondents who would/might consider using a new USDA-inspected slaughter service, 24 are currently using USDA-inspected processing services.

In 2018 these 24 respondents produced:

- 185 USDA-processed beef
- 324 USDA-processed hogs
- 230 USDA-processed sheep
- 59 USDA-processed goats

On the Olympic & Kitsap Peninsulas:

- 140 USDA-processed beef
- 242 USDA-processed hogs
- 29 USDA-processed sheep

- 34 USDA-processed goats

(Assuming all these animals went to a new processor, and processing capacity of 8 beef, 20 hogs, and 30 sheep/goats per day, this is 32 days of processing per year, or 2.67 days per month. This does not consider seasonal variations)

These Olympic/Kitsap producers are willing to travel:

- Up to 25 miles – 1 producer
- Up to 50 miles – 4 producers
- Up to 75 miles – 1 producer
- Up to 100 miles – 3 producers
- More than 100 miles – 3 producers

The following were listed as conditions to use a new USDA-inspected slaughter service:

If it were closer to my farm – 11
If pricing was competitive – 11
If scheduling was easy – 6

Other comments:

- If I could rent a trailer or arrange transport
- If I felt good about the animal and carcass handling
- If it came to my farm.
- If they adopted more progressive technique
- If we can keep all animal parts.
- The slaughter service needs to be near or deliver to a USDA inspected butcher shop that does pork well.

If a new USDA-inspected slaughter service were available, producers would be willing to travel:

Not willing to transport, slaughter must happen on farm – 17
Up to 25 miles – 26
Up to 50 miles – 17
Up to 75 miles – 5
Up to 100 miles – 5
Over 100 miles – 3

The following number of animals were processed in 2018 under Custom Exempt:

Beef – 132 by 23 producers
Hogs – 231 by 27 producers
Sheep – 245 by 17 producers
Goats – 57 by 8 producers
Bison/Yak – 0

The following number of animals were processed in 2018 under USDA inspection:

Beef – 185 by 10 producers
Hogs – 324 by 11 producers
Sheep – 251 by 8 producers
Goats – 74 by 5 producers
Bison/Yak – 0

20 Producers indicated that they currently transport animals to a USDA-inspected slaughter facility, and they travel an average of 120 miles one-way.

Producers use the following USDA-inspected processing facilities:

Del Fox Meats – 2
Island Grown Farmers Cooperative – 7
Heritage Meats – 12
Malco's Buxton Meats – 5
Minder Meats – 2
Smokey Ridge – 1
LPCA – 1

Producers travel an average of 110 miles one-way to a USDA-inspected slaughter facility.

Of the 24 producers who currently use USDA-inspected processing services:

13 are satisfied
9 are partially satisfied
2 are not satisfied

54% of respondents are satisfied with their USDA-inspected processing services
46% of respondents are not fully satisfied with their USDA-inspected processing services

The following issues were cited as sources of dissatisfaction:
Not close enough – 9
Scheduling is difficult – 7
Too expensive – 5

Other comments about dissatisfaction:

- Butcher on property
- Cut and wrap very expensive. They don't offer much in the way of curing. Excellent top management and customer service keeps me going there however.
- Didn't know
- Difficult to communicate with office staff as a result lots of problems getting all our meat back, labeling mistakes, ingredients issues and more. Would like more autonomy with our products as well as a better and more direct relationship with butcher to help us get cuts we want and need.
- Does not come to my farm so I have never checked for affordability.
- Does not exist here!

- don't want my animals waiting in some pen somewhere for days.
- I am unsatisfied with current services.
- I can't comment on scheduling as we gave up in dealing with it about 3 years ago. As mentioned in another questions response we've found it easier to sell 'custom'. If the associated expenses were cheaper we would consider more USDA cut and wrap but when the cost of compliance increases it pushes more people toward custom cut and wrap. This seems contradictory to the intention of increasing public health and safety with the USDA cut and wrap protocols
- I want all of my animal returned to me. I only get half my kidneys or livers and I really want my pelts back on my lamb.
- Inconsistent cut quality and packaging, cut instructions not always followed.
- Inconsistent management in past. High cost and limited options for post slaughter processing.
- Is there one in Clallam County?
- Lack of information on location, and prices without looking really far into it.
- Lack of respect for animals during slaughter process
- Not attached enough with slaughter.
- Not cost effective for the small number of livestock I can produce on my property.
- Processors have limited need to work with clients' special request.
- Quality issues
  Missing boxes of meat, etc.
  Mislabeling of meat
  Lack of smoked meat options
- They misinterpret orders. I asked to have all the caul and leaf fat packaged separately, but they ground it into the sausage make really fatty sausage.
- Transporting live animals is challenging for us
- We can't keep all parts of the animals and it is stressful for the animals to travel so far.
- Where is it?

29 respondents indicated that they do not currently use USDA-inspected processing services, but would be interested in doing so.

- Of these 29 respondents, 25 cited distance to processing as the reason they do not use existing services, 15 cited high costs of services, 2 did not know about available services, and 1 felt regulations were too cumbersome.
- Of the 25 respondents indicating distance to services were a barrier:
  - 8 would not transport livestock off farm, slaughter would need to happen on farm
  - 13 would transport up to 25 miles
  - 3 would transport up to 50 miles
  - 1 would transport up to 75 miles

43 of 59 respondents indicated they planned to increase production in the next 5 years, 15 would maintain current production, and 1 would decrease production.

- 18 producers plan to increase by 1-25%
- 15 producers plan to increase by 26-50%
- 1 producer plan to increase by 51-75%
- 6 producers plan to increase by 76-100%
- 3 producers plan to increase by more than 100%
- 15 producers plan to maintain current production

- 1 producer plans to decrease by 1-25%

On a scale of 1-5, with 5 being of high importance, respondents indicated the following average values for factors influencing their plans to expand USDA-inspected animal processing:

- Access to USDA-inspected slaughter and processing services – 4.5
- Access to farmland – 3
- Market Development – 3.2
- Labor – 2.9
- Aging – 2.4

7 of 71 respondents are currently a member of a cooperatively-owned meat processing business.

Of the 64 respondents who are not currently members of a cooperatively-owned meat processing business:

- 35 would be interested in joining
- 27 would consider it
- 2 would not consider it

Comments of those who would consider it:

- Yes, if cost effective given low volume of use (15-20 pigs/yr?)
- Rather see a private for profit USDA plant
- Hard to pull off successfully
- Depends on location, what all is included and how much it cost for founding membership and how long it will take from initial start investment until it is up and running.
- Depends on being able to spread the costs across the limited number of animals I process in a year
- It depends on operational and labor costs in addition to quality of variety of 'products' that could be produced.
  Is the slaughter site mobile? Is the processing facility mobile? or easy transportable?
- Would need more info
- Yes, but only if our meat is able to retain our brand name on the label.
- The concerns are farmers being board members and not necessarily thinking of it as a business. Burn out too.
- The last time I heard of this, the cost of buy in was prohibitive
- It would depend on the price. I have seen some that are too expensive for me as a small farm.
- Would depend on the rules, costs and benefits
- Previous efforts to do exactly that have not been successful. Puget Sound Meat Producers Coop for example. I suggest privatizing to allow it to be run and operated consistently as a business and to build a base for future competitors. We need to revitalize the meat infrastructure to include slaughter, cut and wrap, post processing and marketing. That is how we get consistent products and production.
- We were members of PSMPC and while we like the co-op model in theory (and have seen it work in other locations obviously) we would want assurances that any new venture would not have the same problems that PSMPC did.
- Tried that and it was a mess IMO. Not likely going there again.
- If well managed
- I'm 62. By the time one of these springs up, I may be ready to retire.
- the mobile didn't seem to work very well but a regular location might be better

Additional survey comments:

- Having easier access to USDA processing would open up a lot more potential business than Custom/Exempt which is what I'm currently limited to (just not worth the drive to take one or two animals all the way to Chehalis!)
- Legislation "MUST" be changed so WSDA or County inspectors can be used.
- something is badly needed!
  THANKS!
- USDA poultry processing is desperately needed as well, not just large animals
- We grow organically, but are not certified. Clean meat is important to us, so organic harvest and processing needs to be an option or we won't use the service. No citric acid dips ect. And humane harvest is also necessary. We raise our animals with respect and humanity and need that to be a part of their last moments. Same day cull, no feed lot.
- We produce an additional 100 head of pigs that we end up selling live partially due to lack of USDA slaughter options in our area. I have visited with beef ranchers who pool their calves and ship to toppenish, WA for sale at auction. More of these animals could be sold directly to consumers here in Clallam County if we had additional capacity. The USDA and Custom processors are overbooked fall early winter.
- We would like to help and/or be involved in bringing more efficient USDA processing to the area
- You need to include natural conditions, drought, flood, temp etc. as production factors. It's extremely important to collect this type of data at every opportunity. Running a modest 5-600 acer birth to box cattle/grass farm on Lopez Island is being on the tip of the spear of weather/climate change. It's a very big deal!

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