

Final Report
Product Development and Market Research for Beef and Lamb
USDA Inspected Meat Products from Wallowa County

Executive Summary

Wallowa County is home to approximately 25,000 mother cows, with the primary livestock product being calves which are sold on the commodity market in the fall of the year. With rising costs of production, fluctuating commodity prices and the pressures of escalating land values, producers are taking note of the growing demand for value-added meat products and seeking ways to generate a premium or at least stabilize prices for their high quality livestock.

This study examined the potential markets for a Wallowa County grass-finished artisan quality beef product. Producers surveyed felt they could collectively produce between 300 and 1800 head of grass-finished animals annually. Outreach was conducted in the Portland area and other locations to evaluate the demand for and prices that could be achieved through sale of product in direct-to-consumer, retail and wholesale markets. Barriers to entry into the marketplace and models of success were also investigated.

Demand for grass-fed meats continues to grow and purveyors of quality meat are motivated to find ways to bring grass-fed product into their supply. Producers who have the time and resources to cultivate relationships with buyers, and with entities actively promoting local and sustainable food production, will likely generate sales and brand awareness. At this time, the ability to move larger amounts of grass-finished product into the market is constrained primarily by access to quality processing and distribution. There are opportunities for individual producers to act on their own to move some niche product and a few producers are exploring ways to share infrastructure and marketing costs to make these opportunities more attainable. Efforts to collectively supply larger volume buyers could move forward if the committed leadership of an individual or entity arises to support longer term relationship development, education, promotion and infrastructure development.

Background

Property values for agricultural lands are increasing beyond what can be supported by agriculture, deterring



young farmers and ranchers from returning to rural areas and limiting options for those young people who do return. Commodity prices are variable and costs of inputs continue to rise. These factors continue to chip away at the structure of the natural resource based economy of rural Eastern Oregon. Ranching remains one of the few sources of year-round employment, as well as continuing to uphold the values of the community and the desire to keep the landscape in agricultural production. Therefore, it is of great value to the economy and the community to find a way to improve the profitability of ranching so that some people can start new businesses and existing ranch businesses can have a more stable future.

Over the past few years a number of agriculture producers have contacted the Northeast Oregon Economic Development District (NEOEDD) to discuss value-added products. Many local meat producers were becoming aware of the growing demand for safe, healthy, differentiated meat. Nonetheless, many funders, policy makers, academics, members of the local public and conventional ranchers remained skeptical about the number of consumers willing to buy specialized products, in particular, grass-fed meats.

A number of local ranching entrepreneurs asked NEOEDD to investigate market and product development options. These producers were particularly interested in trying to determine the quantity and type of USDA inspected meat products that they could sell cooperatively in Portland and to local tourists. In addition, some producers who are already accessing the growing markets for specialty meat had identified a need to increase local meat processing capacity, including the possibility of USDA-inspected facilities.

Several entrepreneurs, including existing meat processors, indicated an interest in expanding or developing new slaughtering and processing facilities, including USDA inspected facilities. The local non-profit Wallowa Resources and its for-profit subsidiary, Community Solutions Inc., voiced support for the project and interest in helping fund a business plan for processing facilities if a project was determined feasible.

Methodology

NEOEDD committed funds and staff time and secured matching funds from a USDA Rural Business Enterprise Grant and Wallowa Resources to undertake the project. NEOEDD staff, contracted services and volunteers performed the work necessary to complete project activities. Participating meat producers helped collect information needed for meetings with potential buyers, marketing consultants, processors, policy makers, funders, and others to discuss markets, processing and distribution options.

Meetings were held with potential buyers in Portland (specialty food services, restaurants, larger natural grocery and coop stores). Specialty meat producers and processors were also consulted along with industry-related professionals at non-profit and government entities. Additional research focused on sale and/or disposal of byproduct, policy changes related to sale and processing of meat, development of value-based supply chains, and expansion of custom-exempt bulk sales. Information was collected on product supply, market and production barriers, and potential organizational structures.

Preliminary results were evaluated and next steps were considered. Final results were presented to producers, partners and the community at large in a public meeting. A complete file of project documents, contacts and activities was collected and is available at the NEOEDD office for review.

Producer Interest, Supply, Product standards

Twenty five entrepreneurs were contacted with information about the project and asked to complete a survey (Appendix A). Several producers provided ongoing feedback during the project and volunteered additional time to assist with market research meetings. Group meetings were held, as well as meetings with individual producers. The purpose of the meetings was to:

- ◆ Assess interest and concerns, determine draft standards and supply for a cooperative product, and discuss organizational structures
- ◆ Discuss preliminary results and possible marketing strategies
- ◆ Provide information on NW Trade Adjustment Assistance, Sustainable Agriculture Research and Education and USDA Value-Added Producer grants as possible technical assistance funding
- ◆ Discuss next steps

Surveys

Eight beef producers completed surveys. This group indicated a willingness to supply a group marketing effort. Most preferred to sell finished animals directly to the buyer (retail/wholesale/ consumer) and pay a fee for marketing support, rather than to sell calves, yearlings or finished animals to an intermediary organization.

The group thought they could provide:

- ◆ grass-finished animals, 950-1,000 pounds
- ◆ artisan product with exceptional flavor, of limited supply and origin, healthy, consistent high quality
- ◆ locally born and raised, without use of antibiotics or hormones
- ◆ 300 - 500 animals in the short term (2 years)
- ◆ 1700 - 1800 animals in the longer term (3+ years)



Only one lamb producer expressed interest in the project, however, this producer opted not to complete a survey or provide lamb production capacity information. The study then proceeded to focus on beef.

Rancher motivations for entering new markets included:

- ◆ increased or more reliable income
- ◆ reduction of effect of fluctuations in grain prices
- ◆ reduction of need for off-ranch employment
- ◆ sustainability of ranch/family
- ◆ opportunity to enter the niche market at a good time.

The primary barriers identified included:

- ◆ limited capacity of local humane slaughter and processing facilities
- ◆ access to technical assistance to complete individual ranch business plans needed to transition to a grass-finished product

Concerns that were raised by producers included:

- ◆ access to processing
- ◆ cost of land leases
- ◆ seasonality of product (fresh)
- ◆ consumer attitudes regarding frozen product
- ◆ difficulty deferring income during switch to production of grass finished animals
- ◆ how to share the work load of a cooperative effort
- ◆ equity among producers in realizing sales
- ◆ ability to maintain consistent high quality product

Artisan and Grass-fed Product Standards

An artisan quality grass-fed meat product is the one of the highest value meat products raised in Wallowa County. An artisan quality product is the result of careful finishing of animals on grass, harvest using humane slaughter services (typically at 20 to 24 months of age), dry aging and skilled and detail-oriented processing. Like a fine wine, artisan meats are considered to be a product of the unique environment and culture in which they are raised and processed.

USDA recently released their requirements for labeling of meat for sale as “grass-fed.” The Food Alliance also completed a grass-fed standard for their third party certification program. This program serves meat producers who are promoting sustainable production as part of their product standards. Food Alliance and USDA production standards differ from what some Wallowa County producers are currently using to produce their grass-fed meat. In order to market a grass-fed labeled product, producers would need to meet the minimum grass-fed standards as set out by USDA or market under a different label.

Market and Product Research

Interviews and other methods were used to collect information on products, pricing, demand, supply chains, partnerships, requirements, organizational models and financing models. More than thirty individuals were contacted in addition to literature review and internet research (Appendix B contains a list of primary contacts). Producer entities with niche meat products were researched via phone, internet and in person contacts to collect examples of product standards, methods of sale, organization type, pricing and challenges.



Marketing and niche food professionals were asked to comment on opportunities and challenges of supplying a Wallowa County Artisan Meats product for wholesale, retail and direct-to-consumer markets.

Numerous articles and reports were reviewed regarding products and issues related to specialty meat. These articles helped illuminate the pulse of the consumer “green” food scene and players on that scene. Businesses and organizations which could become part of a supply chain for Wallowa County meat products were contacted, as well as entities which could provide support services.

During appointments with potential buyers, distributors and others, information was provided for a Wallowa County Artisan Meats product, emphasizing quality, and a desire for accountability to customers, Wallowa County ranching families and the communities where they live. The product was represented as a unique, seasonally available fresh product (or year round frozen product), with very limited supply, produced by Wallowa County ranchers in the early stages of organizing to cooperatively supply the marketplace. The desire of Wallowa County Artisan Meats to supply entire animals (sides) rather than cuts as a way to reduce costs and improve profitability was stressed, as well as producers’ interest in forming partnerships to assist with development of a supply chain.



“We offer exceptionally flavorful beef that captures the essence of the environment in which it is raised. Our pasture-raised animals meet Food Alliance grass-fed standards. We never use hormones, steroids or antibiotics. Our beef is humanely slaughtered, dry aged and expertly hand cut. Our seasonal artisan meats are available fresh from May – November. Our high quality flash frozen product is available year round.”

All of the potential outlets and industry professionals contacted indicated a growing demand for grass-fed meats from consumers and a desire to be able to supply that demand. It was noted that several high volume buyers cannot currently source grass-fed meat from their existing suppliers and that those suppliers are working to find ways to add grass-fed meat to their product line. Potential buyers and industry contacts identified opportunities to increase brand awareness and sales in the direct-to-consumer (bulk and via buying clubs), retail and wholesale markets. They also saw that there were significant challenges in the availability of adequate processing and transportation from our corner of the state, as well as the ability of producers to provide consistent quality at a profitable pricing structure. Regulatory requirements designed for industrial food systems were acknowledged to be a hurdle for producers seeking to bring a lower volume artisan quality meat product into the retail and wholesale marketplace.

A few buyers have already developed strong relationships with selected grass-fed meat producers and are working to help them develop supply chains and improve product consistency in hopes of ramping up supply to meet future demand at a profitable margin. Some of the contacts indicated an interest in continuing conversations to try and overcome some of the similar obstacles faced by Wallowa County producers.

Most of the restaurants contacted want to convey a message of sustainability in sourcing their products. They prefer to support local, sustainably raised and harvested products, but often don't want to forgo the convenience of deliveries arriving on the Sysco truck. They also struggle with using a seasonal product, or the alternative, a frozen product. Of the restaurants surveyed, most (70%) were interested in sampling product. Of those that sampled product, all but one felt they had enough menu flexibility to vary their menu and accommodate a seasonal product. Two were willing to purchase beef by the cut for the price point we represented (30% higher than commodity natural beef) and one was willing to purchase a whole animal. One was already purchasing whole animals from another producer.

Consumer Demand and Perceptions of Grass-fed Beef

A variety of research has documented the increasing demand for differentiated food products, including meat. Demand for organic meat products had a 78% growth rate in 2003 and was expected to continue to grow at a rate of 43% through 2008 (USDA Research Report, Painter, 2008). It has also been noted that the appeal of locally produced foods is greater than that of organic foods. However, foods, including meat, must first meet consumer requirements of taste and food safety before attributes such as locally-produced will add additional value.

Wallowa County grass-fed meat producers who are currently marketing direct-to-consumers report that most of their customers are motivated by a desire for an antibiotic and hormone-free, good-tasting product. These consumers are often concerned about food-safety scares resulting from factory-farmed meats raised in feedlots and processed in high volume industrial supply chains. Some consumers are also motivated to buy grass-fed meat based on its lower fat and higher protein content compared to conventional beef. Some also indicate a desire to support locally and sustainably raised food.

Nonetheless, producers have commonly heard generic remarks about why consumers would not want to purchase a grass-fed meat product. These negative perceptions have generally centered on the idea that consumers think grass-fed meat will be tough, dry or "gamey."

In July of 2009, the Food Innovation Center conducted a Sensory Consumer Test (taste test) comparing conventional commodity ground beef to grass-fed ground beef from Wallowa County. This blind test involved 112 consumers who tasted two samples of cooked ground beef and answered a questionnaire on perceptions about meat.



Results showed that consumers found the grass-fed beef to be significantly more tender and juicy. Perceptions about grass –fed beef included:

- 88% perceived grass-fed to be healthier
- 76% perceived grass-fed to be more humane
- 71 % perceived grass-fed to be better for environment
- 13% perceived grass-fed to be gamy
- 5% perceived grass-fed to be tough
- 51% switched to natural/organic beef due to food safety concerns
- Most important attribute was no hormones/antibiotics
- 72% are willing to buy frozen beef
- > 20% had purchased bulk beef directly from a rancher
- 81% would consider direct purchase if they knew the producer or had a recommendation from a friend
- Main barriers to direct purchase of beef were too much meat and lack of freezer space

Opportunities

There appear to be a number of opportunities that Wallowa County ranchers can avail themselves of to access markets for a niche grass-fed artisan meat product. A summary of the comparative live weight per pound pricing for each of these opportunities is shown below. These prices can be compared to commodity live weight pricing (currently approximately 90 cents/pound) to give an idea of the premiums available. The attractiveness of the different market options will be influenced by each producer's cost-of-production and their willingness to invest time and financial resources in making contacts or working collaboratively.

	Buying Club/ Farmer's Market	Bulk Sales– Whole, Side, or Quarter
Direct-to-Consumer	\$2.00	\$1.45
	Cuts of Beef	Whole animal
Restaurant	\$1.30	\$1.35
Food service/ Institutional	\$1.20	\$1.10

The above prices are based local or regional processing with an additional \$100/head cost for delivery and transportation. Prices do not include significant costs to develop these markets, which could be 10-20% of gross sales.

A number of models were identified for how producers are successfully accessing these niche markets. As individuals, producers have successfully accessed direct-to-consumer markets through sales of bulk beef. Others have been able to sell USDA inspected products by the cut at farmer's markets or through buying clubs, and to retail outlets. By marketing collectively, some producers have successfully accessed wholesale and institutional markets.

Individual Producer Opportunities

Custom Exempt Bulk Sales

Sale of grass-fed meat in bulk allows consumers to purchase a quarter, half or whole animal directly from the rancher. These animals can be harvested and processed using custom exempt (state inspected) facilities. Some Wallowa County meat producers are already selling in this market. Of the approximately 300 head of grass-fed beef that are processed locally, it is estimated that approximately 65% are sold to bulk buyers outside the County. Local producers have entered the marketplace under their individual ranch brands in a variety of locations including, Bend, Pendleton, Portland, Moscow, Pullman, Tri-Cities, Spokane and Seattle. Bulk sales are a proven model for producers to add value to their animals and the potential to increase bulk sales is good considering the growing demand from consumers for healthy high quality meat.

Advantages:

- Individual producers can pursue custom-exempt sales on their own
- Producers can utilize local slaughter and processing
- Significant price premium
- Inexpensive start-up
- Low cost resources are available to help market, such as Eatwild.com, localharvest.org, Rural Roots, other local food guides
- Variety of other support resources, Niche Meat Processors Assistance Network (www.nichemeatprocessing.org), university extension, USDA Rural Development

Challenges:

- Increasingly crowded marketplace, must have a way to differentiate product
- Distance to marketplace
- Need for consumers to purchase freezer storage and accept large volume of meat
- Limited processing slots available, especially in August – September
- Significant work to sell more than 5-10 head
- Producer must take on extra work, marketing, customer management, invoicing
- Producers must adhere to regulations– sell animal, not meat

USDA Inspected

Some producers, including several local producers, are also selling individual cuts of meat direct-to-consumer at venues such as farmer's markets, buying clubs, or through online sales. Product sold by the cut must be harvested and processed at USDA inspected facilities. Once a producer commits to using USDA processing, they also have the option of selling product to restaurants, retailers, distributors and institutions.

Advantages

- Price premium
- Great flexibility in how and where you sell
- Buying club model proven effective for some producers
- Resources available to help market, such as EcoTrust– Food Hub
- Resources for third-party certification of sustainable, organic, etc. Food Alliance, Oregon Tilth
- Some resources for business development such as USDA Value-Added Producer grants

Challenges

- Challenging to sell the entire animal– inventory management
- Challenging to set prices of various cuts
- Long distance from marketing venues
- Hard to sell low-end cuts to individuals
- Must transport animals to USDA slaughter and processing & transport again to market
- Hard to build reputation with retailers

Collective Marketing Opportunities

One successful model for collective marketing is where a single producer steps forward to market other producers' animals. Examples of this model include Thundering Hooves in Walla Walla and Eel River Organics in Northern California. Animals are raised to standards specified by the marketing producer who then purchases the animals for resale under his/her brand identity via any market outlets he/she chooses.

Advantages

- Provides opportunity for someone who is good at marketing
- Allows producers who do not want to market to focus on production
- Price premium available to producer with limited investment of time
- Easy to set-up
- Non-local producers/brands could be in the marketing role

Challenges

- Less premium available to producer
- Market is dependent on someone else's ability to grow and maintain market segment
- Locally, no one is offering to market others' animals at this time

Another successful collective model involves producers who maintain individual identities, but share certain marketing and infrastructure costs. Examples of this model include the Sonoma Meat Buying Club and Central Coast Agriculture Coop, both located in California. Several local producers in Wallowa County are currently exploring ways to develop shared marketing, customer and inventory management tools and services while maintaining their individual brand identities.

Advantages

- Producer can share in infrastructure costs and responsibilities, but retain brand identity
- Shared marketing services
- Web-based sales site for multiple producers
- Shared equipment, facilities
- Variation of product less important and expected by customers
- Some resources for business development, such as USDA Value-Added Producer grants

Challenges

- Start-up can require time and organizational investment
- If individual cuts are sold, inventory management can still be a challenge

The third model of successful collaboration involves producers creating a new shared brand and standards and shared marketing responsibilities. Examples of this model include Country Natural Beef (not grass-fed) and US Wellness Meats.

Advantages

- Price premium
- Producers share responsibilities and build on each other's assets
- Ability to work with high volume buyers– Institutions, Food Service.

Challenges

- Start-up can require significant time and organizational investment
- Variation in quality and characteristics of grass-finished product
- Difficult to achieve volume sales quickly to offset start-up time and investments
- Growth can be slow
- Outside expertise usually required

Other Opportunities

Many successful niche meat producers generate revenue through sale of by-product into the raw pet food market, such as bones, organs and ground trim. This can represent up to an additional \$100 in revenue per animal. Pet food product is often processed at a facilities used for product destined for human consumption and marketed in cryovac frozen packages. Pet food products sold direct-to-consumer online or by other methods often achieve prices similar to those for product sold for human consumption.

Obstacles to Increasing Access to Niche Markets

Processing Capacity

Significant growth of any of these models, whether individual or collaborative strategies, will require increased processing capacity. Custom exempt processing is available in or near Wallowa County via one mobile slaughter service and three fixed custom exempt cut and wrap facilities. Harvest and processing capacity is currently constrained during the high demand months of August and September, although additional capacity exists during June, July and October. Custom-exempt processors have little incentive to transition to USDA inspected capability as long as demand for custom-exempt processing remains high.

One additional slaughter facility (fixed) in the region is not currently in use, but could possibly be opened if there is demand to process at least 15 head per week. One fixed processor is considering an expansion and has met with a representative of the Oregon Manufacturing Partnership to discuss ways to increase capacity in his current location. Another local fixed processor is studying the feasibility of upgrading his facility to meet USDA inspection requirements.



The nearest USDA inspected facilities are located in Nampa, Idaho; Moscow, Idaho (University of Idaho); and Walla Walla, Washington. The Walla Walla facility is a fixed facility owned by Thundering Hooves and is the closest USDA facility which provides the dry aging required to produce a premium quality grass-fed beef product. Thundering Hooves also operates a mobile slaughter unit and processes their own grass-fed product. They have indicated that they cannot process any additional outside animals until 2010, when they hope to be able to accommodate an additional 12 head per week. Thundering Hooves has also indicated that they would consider bringing their mobile slaughter unit to Wallowa County for a 20 head minimum, at a cost approximately three times that charged for slaughter of animals transported to them.

Additional information on harvest and processing constraints and models was collected via literature review, interviews, in-person visits, and participation in workshops and the niche meat processor working group. Wallowa Resources' subsidiary, Community Solutions Inc, provided a comparison of regulatory

requirements for custom slaughter versus slaughter for retail sale, and case studies (Appendix C). Washington State University has an interactive planning tool for analysis of owning and operating a USDA inspected mobile slaughter unit (MSU). The cost for an MSU typically runs between \$250,000 and \$300,000. Studies analyzing the cost of a fixed cut and wrap facility range from \$1.5 million for a Nevada facility (2006) that would process in excess of 2 million pound of meat annually, to \$299,000 for a Wyoming facility (2004) that would process 950,000 pounds of meat annually. One of the challenges to development of additional slaughter and processing facilities is that revenue is seasonal due to the seasonal nature of harvest of grass-fed meats.

General observations about processing:

- Many feasibility studies/business plans have been completed
 - Public planning tools and assistance available
- Several new small-scale processing plants are currently in operation
 - Private individuals can be hired to provide guidance (Thundering Hooves)
 - Co-op models can be built upon/copied (Pierce County, WA and Central Coast, CA)
- Locally– opportunity to work with existing processors
- Must continue to grow demand before it is likely that local processors will increase capacity or become USDA inspected

Distribution

Transportation and distribution costs, both in terms of time and equipment, present a challenge to producers accessing direct-to-consumer and retail/wholesale markets in Portland and other metropolitan locations. In 2009, Oregon State University presented a workshop featuring case studies on the development of value-based supply chains. A value-based supply chain is a strategic partnership committed to delivering benefits to all businesses involved in the chain, from producers to processors to distributors. According to the workshop, value-based supply chains are distinguished from traditional food supply chains by: “1) serving products differentiated by superior food quality, environmental stewardship and social responsibility, and 2) the types of strategic relationships that link together the supply chain actors.” Although the experiences of the case study participants varied, key lessons learned included the need to cultivate face-to-face relationships with all partners in the supply chain and to move forward with trial and error.

The ability of local producers to develop value-based supply chains via backhaul or shared distribution methods would increase their options. Currently one local producer is accessing limited shared distribution. Like processing capacity, volumes and seasonality present challenges to development of transportation and distribution infrastructure.

Regulatory Policy

A great deal of discussion is taking place regarding the barriers presented by federal food safety regulations to access to locally produced meat. The safety record of meat processed in state inspected custom-exempt facilities in Oregon is outstanding. However, meat from animals processed in custom-exempt facilities can only be purchased as a share of a live animal prior to slaughter. Since Oregon curtailed their state meat inspection program in the 1970s, all meat sold after slaughter in Oregon must now be processed at a USDA inspected facility, most of which are located in Western Oregon. Wallowa County producers must transport animals at least two hours to reach USDA processing facilities, creating added expense for producers and increased stress on the animals.

Some states have their own state-inspected meat programs which allow meat from state inspected facilities to be sold *within the state* in the retail and wholesale marketplace. A change in the 2008 Farm

Bill allows meat from state inspected processing facilities to be sold across state lines *if the state inspection program meets or exceeds federal standards*. In 2008 Oregon State University and the Oregon Department of Agriculture conducted a study to explore the requirements and feasibility of reinstating a state meat inspection program. A companion survey was used to assess industry interest (processors and producers) in reinstatement of a state meat inspection program in Oregon. This survey found that: “The possibility of a state inspection program has gathered considerable interest from producers and food and rural interest groups reflecting the need for rural development and interest in niche and local meat marketing.” The study recommended: “Further exploration of alternative ways to meet these goals should be considered in policy formulation.” There is also interest in developing legislation that would provide new federal exemption policy for sale of meat processed in small custom facilities with low volumes.

Leadership for Collaboration

While Wallowa County meat producers have proven that they can produce a desirable grass-fed artisan product, no individual producer or entity has emerged to take on a long term leadership role to organize producers to work collaboratively. Producers involved in the project observed that it could take a long time to make progress, but that they were also interested in finding ways to continue to learn from each other and access outside information that could help them solve barriers to greater market penetration.

Conclusions and Recommendations

Findings from this study include:

- Unmet demand exists in bulk, retail and wholesale markets, it takes work to find it
- Wallowa County image adds to product value
- Slow process to build customers, takes time/money
- Customers know a lot about product
- Consumers and producers are motivated
- Policy solutions need to remain on the table (federal and state regulatory changes)
- Momentum is building behind policy changes— Oregon Dept. of Ag, Oregon Rural Action
- Learning is never ending
- Large increase in processing capacity is not likely in the next few years
- Key leadership for cooperative venture has not yet emerged



Recommendations for next steps:

- Work with and support local/regional processors
- When possible, connect local/regional processors to resources that can help them plan for and fund expansion, i.e. Niche Meat Processors Assistance Network, Oregon Manufacturing Partnership, Workforce Training funds, etc
- Follow up with newly formed cooperatives to see how they work out, get copies of operating documents if possible
- Find ways to share information among producers about what is being tried and how it is working – i.e. markets, processing, transportation, technology, producer gatherings and product tastings
- Find ways to build and continue relationships with partners –customers, agencies, non-profit organizations, elected officials
- Access financial resources for individual and group efforts – USDA producer grants, Trade Adjustment funds, Sustainable Agriculture Research and Education grants, individual contributions, foundations, government
- Continue to educate consumers and build demand for high quality meat, host chefs/caterers, local food events, media coverage
- Stay abreast of and support policy change



www.neoedd.org

