

# MAINE SUSTAINABLE AGRICULTURE SOCIETY



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## More Maine Meat Processor Survey Report

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### **Additional Documentation**

**Appendix A – Processor Survey Results**

**Appendix B – Processor Survey**

**Appendix C – March 29, 2014 Letter Introducing Survey and Intern**

**Appendix D – May 27, 2014 Letter Accompanying Mailed Survey**

**The survey and this report were made possible by a grant from the Horizon Foundation.**

# Maine Sustainable Agriculture Society

## More Maine Meat Processor Survey Report

### 1 INTRODUCTION

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In 2011 the Maine Sustainable Agriculture Society launched the More Maine Meat project. The intent of the More Maine Meat project is to foster the retention and expansion of existing farms and the creation of new farm enterprises by capitalizing on the development of needed local agriculture infrastructure, understanding consumer market data, and creation of new businesses and value added foods that will lead to more local products being consumed by the local consumer.

The production, processing, and distribution of local meats are much more involved than vegetables. The More Maine Meat (MMM) project, through the collaborative efforts of stakeholders within the industry, is designed to identify and resolve many barriers within this value chain. Ultimately, we are striving for lasting, sustainable change that will lead to more local red meat being accessible by a larger portion of the consumer market.

A key to producing, processing and distributing more Maine meat is to focus on three major stakeholder groups – livestock producers, slaughter facilities and processors, and consumers. Livestock producers need to scale their operations enough to provide the quantity and quality of meat that is being demanded by the marketplace. Slaughter facilities and processors have an important role in the value chain and are currently viewed as a limiting factor to growth of the industry. And consumers because their attitudes and preferences determine how much local meat is purchased in the Maine marketplace.

The focus of this report is on the results of a Processor Survey that was completed between March and June 2014.

### 2 SCOPE OF WORK

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The scope of work for the survey included the planning and implementation of an assessment of 28 slaughter and processing facilities that operate in the state of Maine. The Maine Department of Agriculture, Conservation and Forestry maintains a list of these facilities and it was that list that was used in compiling the names and addresses to conduct the survey. The survey of Facilities was originally conceived in early 2013 as part of a grant to the Horizon Foundation. This survey along with a survey of red meat Producers provides the necessary data to help advance the larger More Maine Meat project. After various versions of the survey were drafted the final survey was launched in March of 2014. The project ended in June of 2014 with the writing of this report.

### 3 METHODOLOGY

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In order to objectively collect the information necessary to meet the Scope of Work, a survey was developed. That survey is attached as Appendix B. Since the project focused on the slaughter and processing facilities as part of the red meat supply chain in Maine, a series of questions concerning numbers of animals, pounds of meat, type of inspection, and interest in expansion were built into the survey. In addition, questions relating to the desire of the facility to work with local producers, what barriers they face, and motivations to expand were also included. The purpose of the survey was to not only collect data on the slaughter and processing of red meat, but also to gauge the facilities interest in working MESAS and producers on expanding red meat production in Maine.

Once the survey was developed, an intern, Rebecca Champagne, with the University of Maine's Sustainable Agriculture Program was engaged to conduct the survey by Phone. A letter introducing Rebecca and the survey was mailed to the facilities on March 29, 2014. A sample is included as Appendix C. Rebecca was provided with an Excel workbook to help capture the data from each survey. Over the next two weeks Rebecca called the facilities to conduct the survey. Given the time of year there were a number of facility contacts that were not available. A number refused to complete the survey, and many asked to be contacted later or to call someone else who would be better suited to answer.

Once Rebecca had gone through the entire list she returned the Excel workbook to MESAS and completed her part of the Scope of Work. In all, eleven facilities were successfully completed by phone. As a follow-up to the phone survey, and in recognition that a number of facilities either did not have the time to answer when Rebecca called or where not available, a paper copy of the survey was mailed. A letter introducing the survey and asking those facilities that did not fill them out to do so was sent on May 27, 2014. A sample is included as Appendix D.

As a result of the mailing an additional five surveys were returned for a total of sixteen surveys completed. Once it was decided that no additional surveys would be returned, the data was compiled and analyzed. The results of the survey are included in Appendix A.

### 4 SURVEY RESULTS

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Overall the results of the survey were very positive. Of the total facilities surveyed, 16 or 57% answered or returned the survey. Of those responding 13 operated both a slaughterhouse and processing facility, one operated just a processing facility, and two did not respond. Facilities were also asked if they operated only for their own use with 81% responding no. The rest of the results will be discussed based on the section of the survey answered. This information will now be used by the More Maine Meat Working Group to assess the opportunities to expand red meat production in Maine and to improve the supply chain.

#### 4.1 SLAUGHTERHOUSES

The first part of the survey focused on slaughterhouses. A majority of the respondents, 81% indicated that they have a kill floor. The next set of questions wanted to determine the number of animals slaughtered per year. In Figure 1 a clear majority of facilities slaughter between 0 and 100 animals a year. For example, there are no facilities slaughtering over 100 goats per year. Beef and Hogs are the animals most commonly slaughtered. For beef there are a few facilities that do less than 100 with a majority of facilities in the 251 to 1000 range. A large number of hogs are slaughtered at 3 facilities in the state.

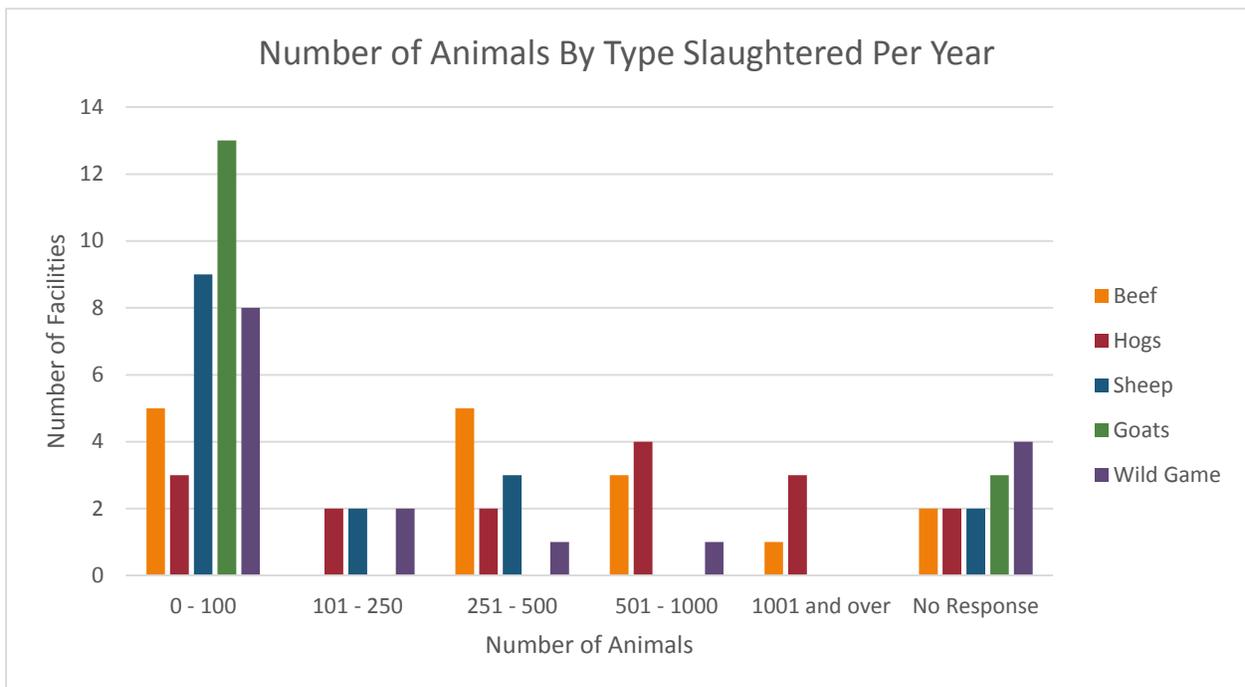


Figure 1

#### 4.2 PROCESSING FACILITIES

The next set of questions focused on facilities that process red meat. Again, a majority of the respondents operate both a processing facility and slaughterhouse. So a majority of the processing facilities also have kill floors.

Respondents were asked to report how many pounds of meat they processed each year. Figure 2 shows the number of pounds processed each year by facility for beef, pork, lamb, goat, and wild game.

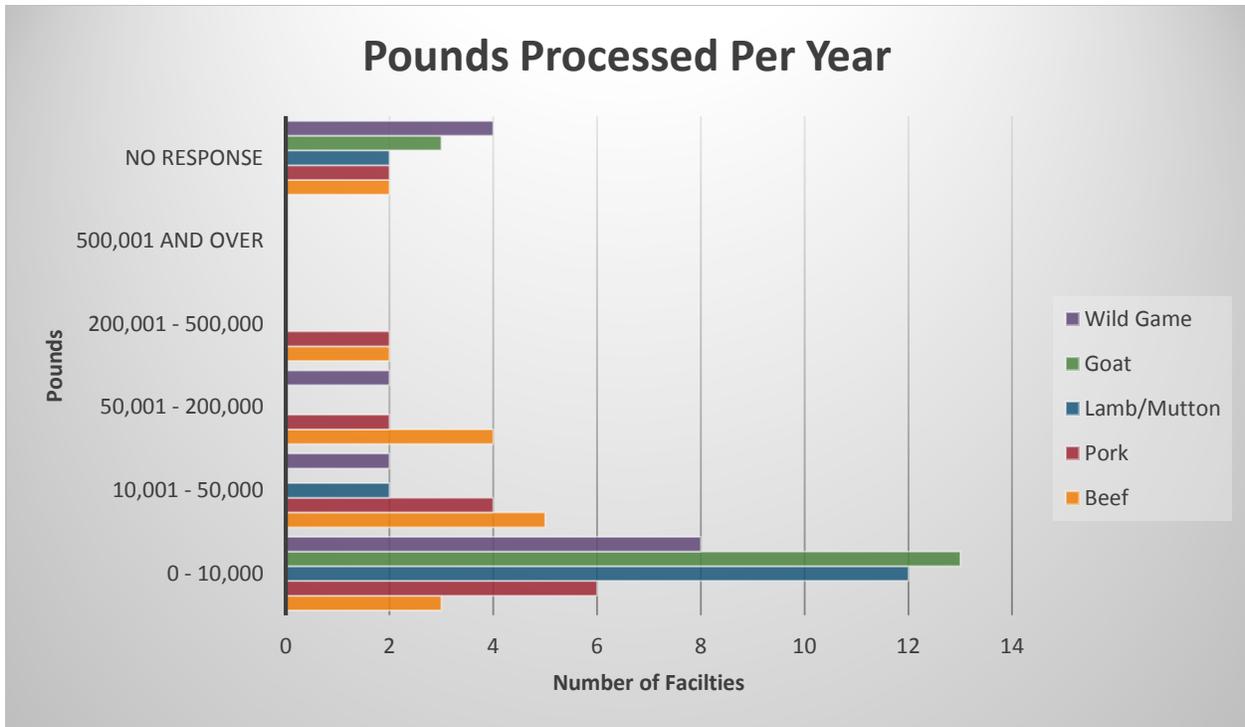


Figure 2

Again, a majority of the facilities responding process under 10,000 pounds of meat a year. Beef, pork, and wild game are the largest volume of processed meat in Maine. Goats are processed by 13 facilities but all under 10,000 pounds. Beef and pork are the highest volume of meat processed with two facilities both processing between 200,000 and 500,000 pounds. Interestingly there were no facilities that reported processing over 500,000 pounds.

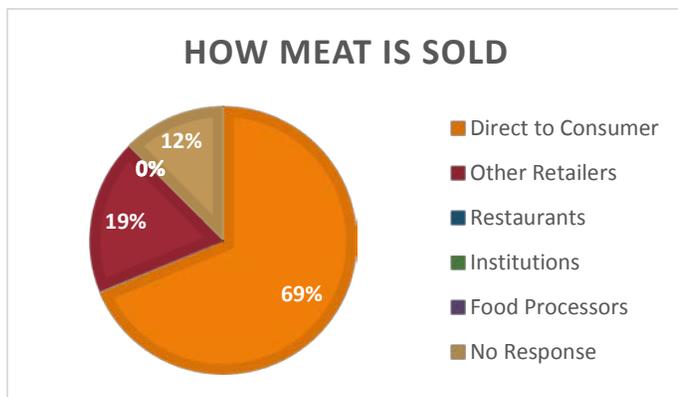


Figure 3

69% of the respondents indicated that they provided other services besides basic processing. Those services included smoking, 56% of respondents doing this, and dry aging, 13% doing this. Of the number of respondents answering the question “How do you sell your meat?” 69% sell direct to the consumer and 19% sell to other retailers. This is shown in Figure 3. When asked if they offered further processing, 69% responded no.

### 4.3 QUESTIONS RELATED TO BOTH SLAUGHTERHOUSES AND PROCESSORS

The next set of questions dealt with the seasonality of the facilities, how they are inspected, cost and finances, operations, and miscellaneous.

### 4.3.1 Season

This section focused on how much of the year the facility operated. A strong majority of respondents, 88% of the total, indicated that they operated between 9 and 12 months of the year. Only one said that they were open 1 to 3 months and one did not respond. Of the total respondents, when asked their busiest months, 38% responded it was October to December, 31% was July to September, and 19% between April and June. Figure 4 shows the breakdown for the busiest months for facilities.

When asked if they would like to be busy during the down months, 69% reported that they in

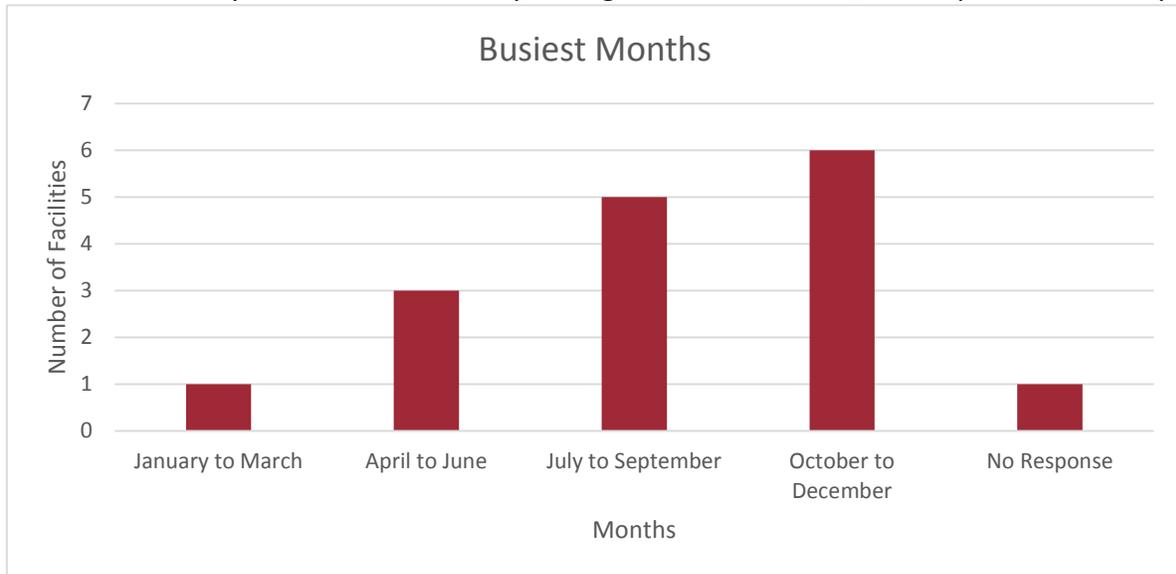


Figure 4

fact would be interested in being busier with only 25% responding no. Finally, the survey asked if by having more business during the down months if this would require more labor. Eight, or 50%, responded yes it would require more labor and 7, or 44%, said no. But 75% of respondents indicated that having more work during the down months would increase other costs associated with the business.

### 4.3.2 Facility Inspection

This section wanted to learn how the 28 facilities in Maine are inspected and their experience with the inspection they are currently governed under. Figure 5 shows that a majority of facilities responding operate as custom slaughterhouses and/or processors. Of the other respondents 5 are state inspected and 2 are federally inspected. The next question asked how

long they have been inspected under their current system. There were no facilities that have been inspected for less than three years. 31% have been inspected between three and seven

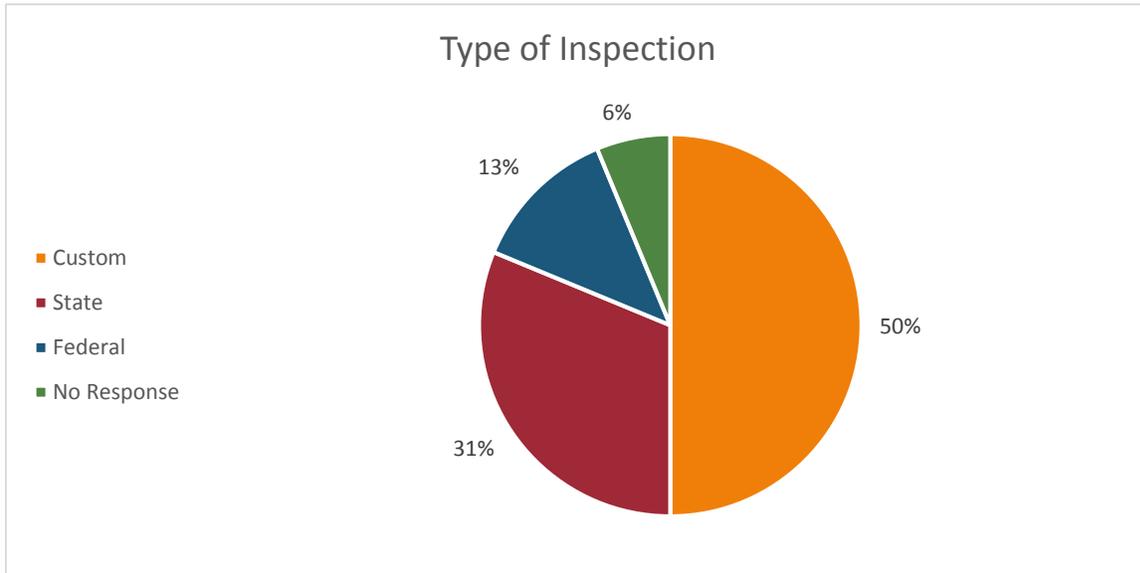


Figure 5

years, 44% between 7 and 15 years, and 13% over 15 years. The results here indicated that the facilities serving Maine’s red meat industry have been established for a number of years meaning that they most likely have the relationships and connections to help them be efficient and profitable. Table 1 indicates that overall the facilities are satisfied with the level of inspection they currently operate under.

| Level of Satisfaction  | Number of Responses | Percentage |
|------------------------|---------------------|------------|
| Extremely Dissatisfied | 0                   | 0%         |
| Dissatisfied           | 1                   | 6%         |
| Neutral                | 1                   | 6%         |
| Satisfied              | 9                   | 56%        |
| Extremely Satisfied    | 4                   | 25%        |
| No Response            | 1                   | 6%         |

Table 1

When asked if they would like to go to the next level of inspection, 31% of the facilities responded indicated that they would like to and 56% said no. There was also a large majority of respondents (94%) who responded no to the question “Would it help your daily operations to have a grader?”

#### 4.3.3 Cost and Finances

The next section focused on cost and finances. As Figure 6 shows the highest variable costs for the facilities responding to the survey are labor and utilities.



Figure 6

Another question sought to find out how willing facilities were to aggregate these costs with other facilities in the industry to lower overall costs for everyone. Half of the respondents indicated that indeed they would like to do this with 38% responding no. Facilities were also asked if they have considered restructuring their operations into a farmer owned cooperative or LC3 to spread financial risk. 75% answered no to this question. But a majority of respondents (63%) indicated that they would be interested in financing options and business assistance to upgrade their facility. And 88% would be interested in learning about alternative energy options for their facility. Finally, when asked if they would be interested in investing in alternative energy options if assistance were available, 81% responded yes.

#### 4.3.4 Operations

The next set of questions sought to find out about the scale of the operation and potential for growth. Table 2 shows that facilities either envision no change to their current operation or they would like to be somewhat larger than they are now. Only one indicated that they would

| Desired Scale    | Number | Percent |
|------------------|--------|---------|
| Much Smaller     | 0      | 0%      |
| Somewhat Smaller | 0      | 0%      |
| No Change        | 6      | 38%     |
| Somewhat Larger  | 8      | 50%     |
| Much Larger      | 1      | 6%      |
| No Response      | 1      | 6%      |

Table 2

like to be much larger. Of those interested in achieving their desired scale, 50% indicated that capital would be needed to achieve scale and 6% indicated labor. As for the top limitation Figure 7 shows that to be labor and capital. When asked if they had help accessing capital would they make changes, 75% responded yes. Interestingly, 19% responded no.

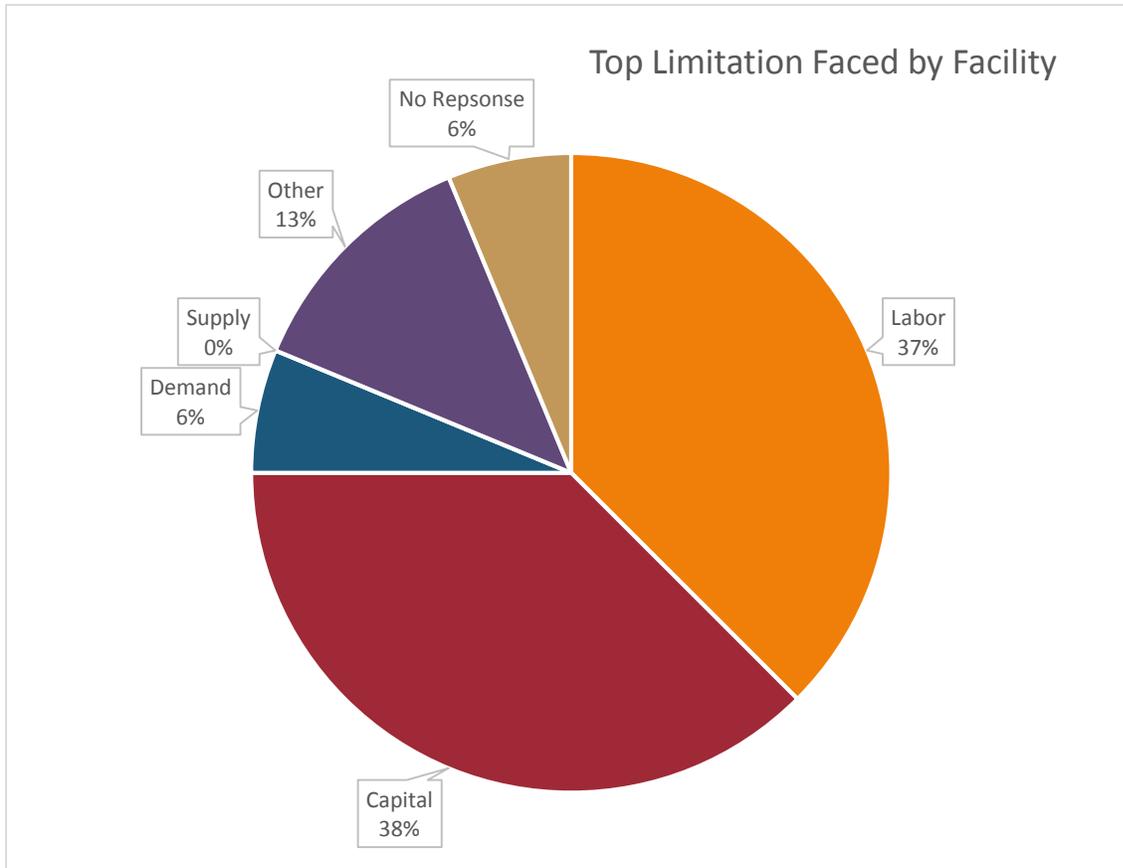


Figure 7

#### 4.3.5 Miscellaneous

This section asked a number of general questions regarding the operation and the relationship of the facility with farmers. As Figure 8 indicates, a larger majority of respondents (88%) said that there needs to be better communication between producers and processors.

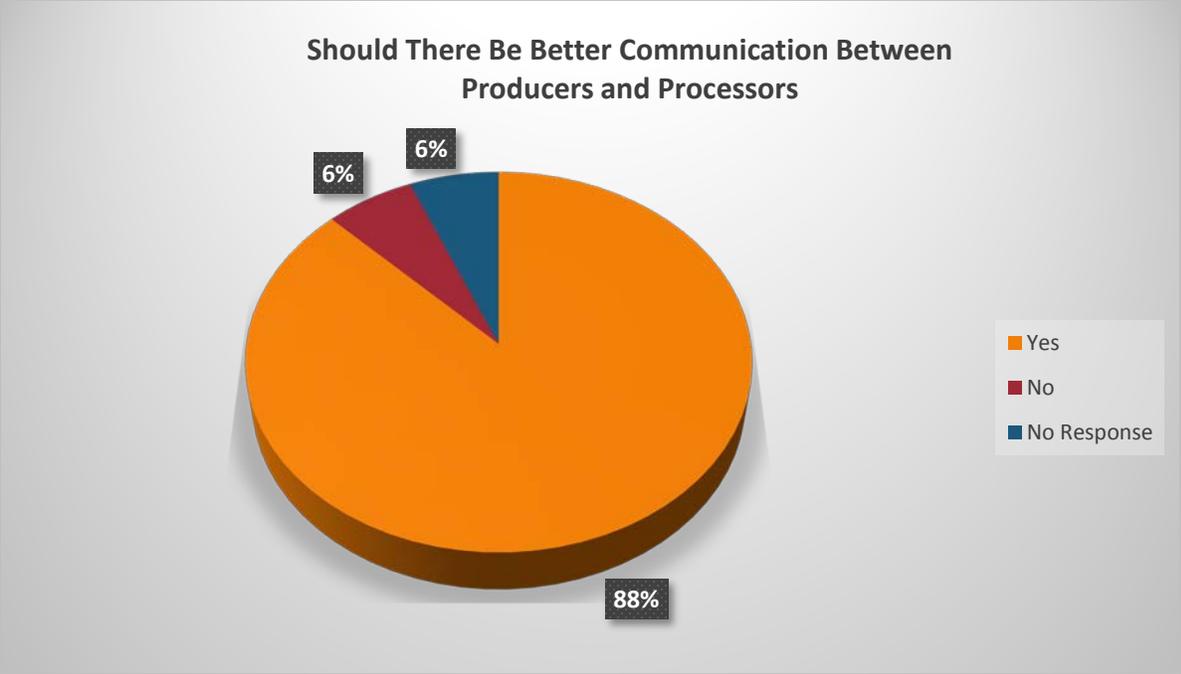


Figure 8

And an even split of respondents, 44% yes and 44% no, would or would not like to see an organization like MESAS develop a standard cut sheet. Somewhat of a surprise was the next response to the question “Should there be a standard contract developed between producer and processor?” where 44% said no and only 38% said yes. Table 3 shows the responses of facilities when asked what would help farmers make better customers.

| Know to be Better Customers | Number | Percent |
|-----------------------------|--------|---------|
| Scheduling                  | 8      | 50%     |
| Pricing                     | 1      | 6%      |
| Delivery Standards          | 1      | 6%      |
| Cut Sheets                  | 1      | 6%      |
| Other                       | 3      | 19%     |
| No Response                 | 2      | 13%     |

Table 3

Clearly, the facilities feel that better scheduling would help make farmers better customers. Finally, a clear majority of respondents indicated that they do not have trouble disposing of their waste.

4.4 EXPANSION OPPORTUNITY

This section attempted to get feedback on the opportunity to expand red meat production in

Maine. More specifically, this section wanted to know what facilities thought about adding more throughput of Maine animals to the supply chain.

A clear majority of respondents indicated that they would be willing to source more Maine grown animals with 94% responding yes. Additionally, 69% of facilities responding said they would be willing to expand to accommodate more Maine animals. Only four facilities indicated that they would not. With these facilities indicating that they would take more Maine animals and expand if needed, the next two questions sought to find out how many more animals and how many more pounds. Figure 9 shows the responses when asked how many more animals they would handle and Figure 10 shows how many more pounds they would be willing to process.

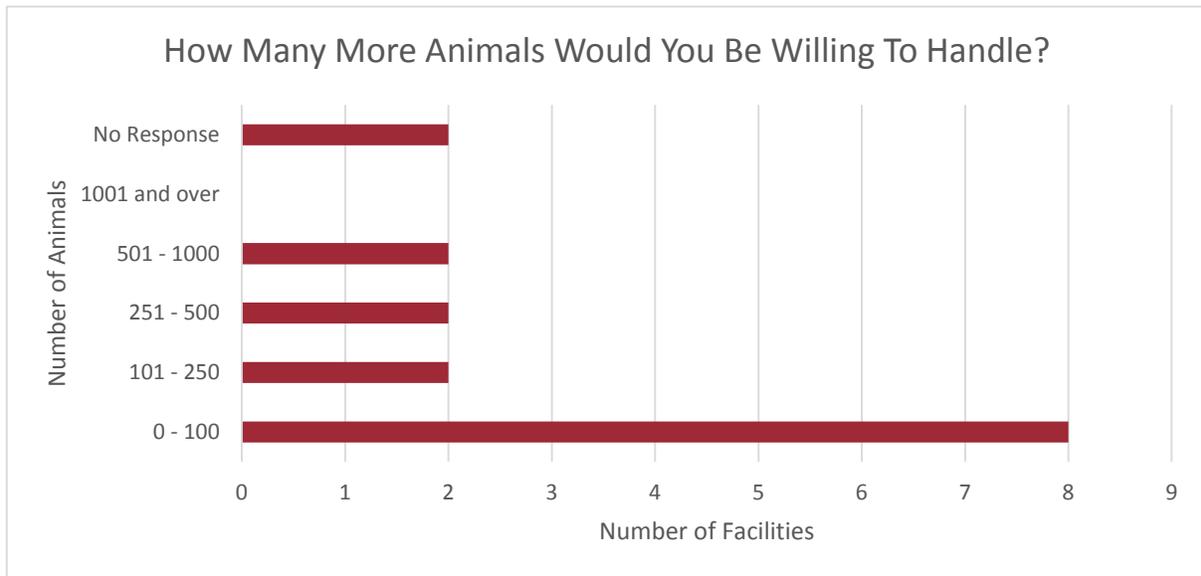


Figure 9

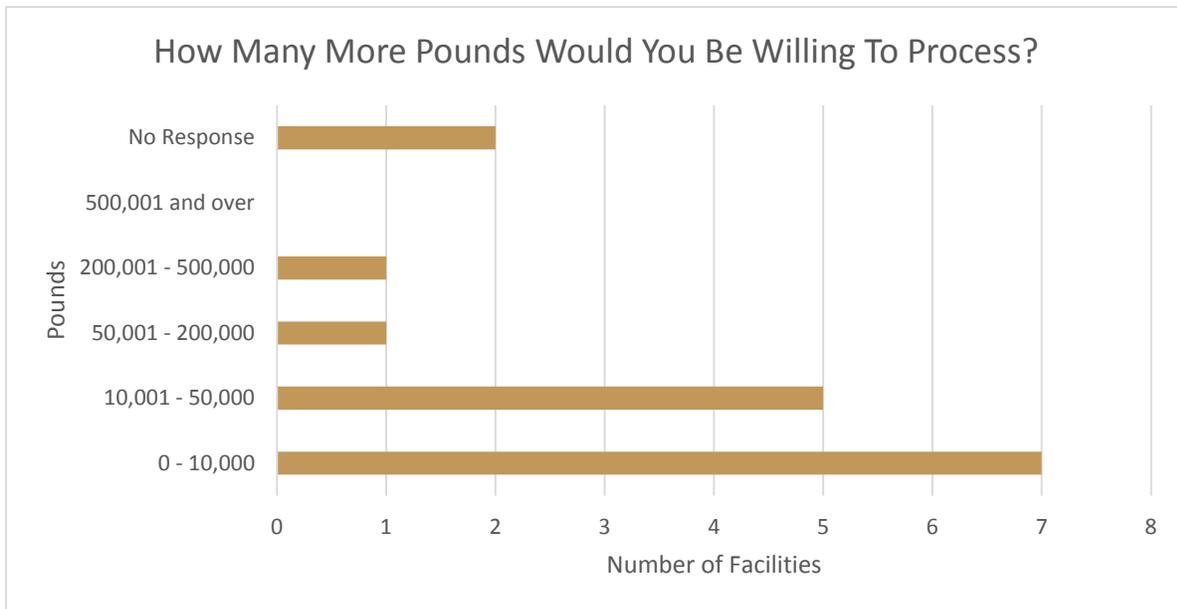


Figure 10

The final question of the survey asked how they would market this added Maine meat. 69% indicated that they would process for the farmer, 13% would distribute themselves and 13% would opt for some other option.

#### 4.5 COMMENTS

Certain questions asked in the survey had an option for a written response. The table below is the exact comments from the survey by question and the number of responses. Responses are separated by a semi-colon.

##### MMM Processor Survey Comments

| Question | # of Comments | Comments separated by semi-colons  |
|----------|---------------|--|
| 4C       | 4             | sausage links; sausage in bulk; sausage and jerky, vacuum sealing; sausage and smoking   |
| 6B       | 2             | "at whim of inspectors"; currently trying to become state inspected  |
| 10       | 10            | all of above; 1,3; answers 1 and 2; cleanliness of product; same as above; 1,3; pick-up times; doesn't deal with farmers much; need to be able to get animals in winter, spring, and summer; farmer education is key |
| 11       | 4             | not "trouble"; more of a nuisance; time to time; a company to pick up waste weekly would be good; composts it, if he had more money he would pay for it to be picked up.   |
| 13C      | 6             | answers 1 and 2; same as above; would help farmers market it; sell in his store; I would like to open a meat market; our own branding for larger chain grocery stores  |

## 5 CONCLUSIONS AND RECOMMENDATIONS

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This survey was part of an initial data gathering process for the More Maine Meat project to determine how the slaughterhouse and processing facilities in Maine operate and what their interest would be in expanding and/or taking on more animals to help expand the red meat industry in Maine. This survey was accompanied by a producer survey that was conducted by Donna Coffin with the University of Maine Cooperative Extension. Together these two surveys and their results will help provide information to the Maine Sustainable Agriculture Society (MESAS) and the More Maine Meat Working Group on how best to address issues and opportunities for expanding red meat production on Maine and to build a more robust supply chain.

The processor survey questions were developed by the Board members and staff of MESAS and were not vetted through a professional data gathering service. It must also be pointed out that while we did receive a good response to the survey, both the phone interview and mailed returns, there is not anything of particular statistical significance that can be derived from the results. Care was taken to give all 28 facilities the opportunity to respond, and the results to offer insights into what can and should be done to help the slaughterhouse and processing facilities in Maine serve the red meat industry better. The information should be used to stimulate discussion on the needs and opportunities of those surveyed and to draw broad conclusions.

One of the assumptions going into this survey was that there was a lack of capacity within the slaughterhouse/processor facilities to handle the number of animals being raised each year. The results of this survey indicate that it may be less of an issue of lack of capacity and more of an issue of underutilized capacity. There are only certain periods of time that facilities are busy and many indicated that they would like more business during the down periods. This may take some additional investment in capital and labor and facilities indicated that if helped they would make those investments. There was not, however, a clear indication on the part of facilities to make their operations bigger or to move to the next level of inspection.

When it came to inspection, most of the facilities are satisfied with the inspection they are receiving and many were happy staying at the level of inspection they currently operate under. If this holds true then the question becomes “is there a need for additional state and federally inspected facilities in Maine?” With many of the operations custom slaughter/processing and a number comfortable at staying where they are, then that would indicate a need to explore more facilities that are state and federally inspected not from a capacity standpoint but to strategically place these kinds of facilities around the state to give producers more options.

It was interesting to note that while a majority of facilities indicated that they agreed with the need for better communication between producers and processors they did not see a need to have a standard contract. And they were evenly split on whether or not to have a standard cut sheet. This might indicate that what facilities want is for farmers to better understand their operations, when they can take animals, and what information would be most helpful from farmers to make the relationship more

productive. In this regard, scheduling was the most common response when asked how farmers could be better customers.

Processors and Slaughterhouses would consider other options for organizing their business, expanding operations, and having assistance with financing and capital. This survey is not scientific enough to determine the best way to go about that suffice to say that the More Maine Meat project should consider reaching out to facilities to find out if one on one assistance to talk through their needs and what options they have would be the best way to go. Certainly we can say with some confidence that scale can be achieved if the project were to focus on providing assistance on capital and labor needs.

Finally, there is positive indication that facilities are willing to take in more animals and process more pounds of Maine sourced red meat. This bodes well for the project because it indicates that we have the capacity in the supply chain to work in concert with producers as they work on expanding herds. What seems to be most helpful is to work with facilities on capital and labor issues but also to find ways to reduce the cost of energy consumption through alternative energy options and to improve the communications and relationships between producers and processors.

As stated previously the data collected is not necessarily statically significant given that the total number of facilities in Maine are a mix of slaughterhouse and processor and there is no good way of separating out the results without identifying an individual respondent. The survey responses do provide a snap shot of what the potential is for either farmers to scale their operations to supply more animals or facilities to make investments in their operations to better utilize their capacity. In either case, work needs to continue with farmers on business planning, enterprise budgeting, financing expansion, herd expansion and management. And work needs to focus on helping those facilities that are interested to work closer with producers to expand what they handle. Most importantly, better communication and relationships can be developed between producers and processors to help the supply chain expand and function more effectively. The results of the survey and this report can help inform the efforts of the More Maine Meat Working Group as they continue to address the needs of the red meat industry in Maine.

**Maine Sustainable Agriculture Society  
Slaughterhouse/Processor Survey  
June 20, 2014**

**Survey Count**

|                               |           |                           |
|-------------------------------|-----------|---------------------------|
| Number of Facilities Surveyed | 16        | 100%                      |
| <b>Total Surveys</b>          | <b>16</b> | <b>100%</b>               |
| <b>Total Possible Surveys</b> | <b>28</b> | <b>% Returned<br/>57%</b> |

**Number of Responses by Question**

|   | <b>Number</b> | <b>Percent</b> |
|---|---------------|----------------|
| <b>1. Do you operate a red meat Slaughterhouse, Processing Facility, or Both?</b> |               |                |
| Slaughterhouse  | 0             | 0%             |
| Processing Facility   | 1             | 6%             |
| Both  | 13            | 81%            |
| No Response   | 2             | 13%            |
| <b>Total</b>  | <b>16</b>     | <b>100%</b>    |

**1a. Do you use the facility only for your own use?**

|              |           |             |
|--------------|-----------|-------------|
| Yes          | 2         | 13%         |
| No           | 13        | 81%         |
| No Response  | 1         | 6%          |
| <b>Total</b> | <b>16</b> | <b>100%</b> |

**For Slaughterhouses**

**2. Do you have a kill floor?**

|              |           |             |
|--------------|-----------|-------------|
| Yes          | 13        | 81%         |
| No           | 1         | 6%          |
| No Response  | 2         | 13%         |
| <b>Total</b> | <b>16</b> | <b>100%</b> |

**2a. How many beef cattle do you slaughter per year?**

|                    |           |             |
|--------------------|-----------|-------------|
| 0 - 100            | 5         | 31%         |
| 101 - 250          | 0         | 0%          |
| 251 - 500          | 5         | 31%         |
| 501 - 1000         | 3         | 19%         |
| 1001 and over      | 1         | 6%          |
| No Response        | 2         | 13%         |
| <b>Total</b>       | <b>16</b> | <b>100%</b> |
| Mean               | 2.6       |             |
| Median             | 3         |             |
| Mode               | 3         |             |
| Standard Deviation | 1.3927    |             |

**2b. How many hogs do you slaughter per year?**

|               |   |     |
|---------------|---|-----|
| 0 - 100       | 3 | 19% |
| 101 - 250     | 2 | 13% |
| 251 - 500     | 2 | 13% |
| 501 - 1000    | 4 | 25% |
| 1001 and over | 3 | 19% |
| No Response   | 2 | 13% |

Appendix A

**Number of Responses by Question**

**Number**                      **Percent**

Total                              16                      100%  
 Mean                                3.1  
 Median                               3.5  
 Mode                                 4.0  
 Standard Deviation               1.5119

2c. How many sheep do you slaughter per year?

0 - 100                                9                      56%  
 101 - 250                            2                      13%  
 251 - 500                            3                      19%  
 501 - 1000                           0                      0%  
 1001 and over                       0                      0%  
 No Response                         2                      13%

Total                              16                      100%  
 Mean                                1.6  
 Median                               1.0  
 Mode                                 1.0  
 Standard Deviation               0.8516

2d. How many goats do you slaughter per year?

0 - 100                                13                     81%  
 101 - 250                            0                      0%  
 251 - 500                            0                      0%  
 501 - 1000                           0                      0%  
 1001 and over                       0                      0%  
 No Response                         3                      19%

Total                              16                      100%  
 Mean                                1.0  
 Median                               1.0  
 Mode                                 1.0  
 Standard Deviation               0.0000

2e. How much wild game do you slaughter per year?

0 - 100                                8                      50%  
 101 - 250                            2                      13%  
 251 - 500                            1                      6%  
 501 - 1000                           1                      6%  
 1001 and over                       0                      0%  
 No Response                         4                      25%

Total                              16                      100%  
 Mean                                1.6  
 Median                               1.0  
 Mode                                 1.0  
 Standard Deviation               0.9962

**For Processing Facilities**

3. Do you have a kill floor?

Yes                                      13                     81%  
 No                                        1                      6%  
 No Response                         2                      13%

Total                              16                      100%

3a. How many pounds of beef do you process a year?

0 - 10,000                            3                      19%

Appendix A

| Number of Responses by Question                                  | Number    | Percent     |
|--|-----------|-------------|
| 10,001 - 50,000  | 5         | 31%         |
| 50,001 - 200,000   | 4         | 25%         |
| 200,001 - 500,000  | 2         | 13%         |
| 500,001 and over   | 0         | 0%          |
| No Response  | 2         | 13%         |
| <b>Total</b>   | <b>16</b> | <b>100%</b> |
| Mean   | 2.4       |             |
| Median   | 2         |             |
| Mode   | 2         |             |
| Standard Deviation   | 1.0082    |             |
| <b>3b. How many pounds of pork do you process a year?</b>        |           |             |
| 0 - 10,000   | 6         | 38%         |
| 10,001 - 50,000  | 4         | 25%         |
| 50,001 - 200,000   | 2         | 13%         |
| 200,001 - 500,000  | 2         | 13%         |
| 500,001 and over   | 0         | 0%          |
| No Response  | 2         | 13%         |
| <b>Total</b>   | <b>16</b> | <b>100%</b> |
| Mean   | 2.0       |             |
| Median   | 2.0       |             |
| Mode   | 1.0       |             |
| Standard Deviation   | 1.1094    |             |
| <b>3c. How many pounds of lamb/mutton do you process a year?</b> |           |             |
| 0 - 10,000   | 12        | 75%         |
| 10,001 - 50,000  | 2         | 13%         |
| 50,001 - 200,000   | 0         | 0%          |
| 200,001 - 500,000  | 0         | 0%          |
| 500,001 and over   | 0         | 0%          |
| No Response  | 2         | 13%         |
| <b>Total</b>   | <b>16</b> | <b>100%</b> |
| Mean   | 1.1       |             |
| Median   | 1.0       |             |
| Mode   | 1.0       |             |
| Standard Deviation   | 0.3631    |             |
| <b>3d. How many pounds of goat meat do you process a year?</b>   |           |             |
| 0 - 10,000   | 13        | 81%         |
| 10,001 - 50,000  | 0         | 0%          |
| 50,001 - 200,000   | 0         | 0%          |
| 200,001 - 500,000  | 0         | 0%          |
| 500,001 and over   | 0         | 0%          |
| No Response  | 3         | 19%         |
| <b>Total</b>   | <b>16</b> | <b>100%</b> |
| Mean   | 1.0       |             |
| Median   | 1.0       |             |
| Mode   | 1.0       |             |
| Standard Deviation   | 0.8997    |             |
| <b>3e. How many pounds of wild game do you process a year?</b>   |           |             |
| 0 - 10,000   | 8         | 50%         |
| 10,001 - 50,000  | 2         | 13%         |
| 50,001 - 200,000   | 2         | 13%         |
| 200,001 - 500,000  | 0         | 0%          |

Appendix A

| Number of Responses by Question                  | Number    | Percent     |
|--|-----------|-------------|
| 500,001 and over                                 | 0         | 0%          |
| No Response                                      | 4         | 25%         |
| <b>Total</b>                                     | <b>16</b> | <b>100%</b> |
| Mean   | 1.5       |             |
| Median   | 1.0       |             |
| Mode   | 1.0       |             |
| Standard Deviation                               | 0.7977    |             |
| <b>4. Do you offer other services?</b>           |           |             |
| Yes  | 11        | 69%         |
| No   | 4         | 25%         |
| No Response                                      | 1         | 6%          |
| <b>Total</b>                                     | <b>16</b> | <b>100%</b> |
| <b>4a. If yes, what kind of service?</b>         |           |             |
| Smoking  | 9         | 56%         |
| Curing   | 0         | 0%          |
| Dry Aging  | 2         | 13%         |
| Delivery   | 0         | 0%          |
| Labelling  | 0         | 0%          |
| No Response                                      | 5         | 31%         |
| <b>Total</b>                                     | <b>16</b> | <b>100%</b> |
| Mean   | 1.4       |             |
| Median   | 1         |             |
| Mode   | 1         |             |
| Standard Deviation                               | 0.8090    |             |
| <b>4b. How do you sell your meat?</b>            |           |             |
| Direct to Consumer                               | 11        | 69%         |
| Other Retailers                                  | 3         | 19%         |
| Restaurants                                      | 0         | 0%          |
| Institutions                                     | 0         | 0%          |
| Food Processors                                  | 0         | 0%          |
| No Response                                      | 2         | 13%         |
| <b>Total</b>                                     | <b>16</b> | <b>100%</b> |
| Mean   | 1.2       |             |
| Median   | 1.0       |             |
| Mode   | 1.0       |             |
| Standard Deviation                               | 1.2536    |             |
| <b>4c. Do you offer further processing?</b>      |           |             |
| Yes  | 4         | 25%         |
| No   | 11        | 69%         |
| No Response                                      | 1         | 6%          |
| If yes, What kind?                               |           |             |
| <b>Total</b>                                     | <b>16</b> | <b>100%</b> |
| <b>For Both</b>                                  |           |             |
| <b>Season</b>                                    |           |             |
| <b>5. How many months a year do you operate?</b> |           |             |
| 1 to 3   | 1         | 6%          |
| 3 to 6   | 0         | 0%          |
| 6 to 9   | 0         | 0%          |
| 9 to 12  | 14        | 88%         |

Appendix A

| Number of Responses by Question   | Number    | Percent     |
|---|-----------|-------------|
| No Response   | 1         | 6%          |
| <b>Total</b>  | <b>16</b> | <b>100%</b> |
| <b>5a. What are your busiest months?</b>                                |           |             |
| January to March  | 1         | 6%          |
| April to June   | 3         | 19%         |
| July to September   | 5         | 31%         |
| October to December   | 6         | 38%         |
| No Response   | 1         | 6%          |
| <b>Total</b>  | <b>16</b> | <b>100%</b> |
| <b>5b. Would you like to be busier during your down months?</b>         |           |             |
| Yes   | 11        | 69%         |
| No  | 4         | 25%         |
| No Response   | 1         | 6%          |
| <b>Total</b>  | <b>16</b> | <b>100%</b> |
| <b>5c. Would this require hiring more labor?</b>                        |           |             |
| Yes   | 8         | 50%         |
| No  | 7         | 44%         |
| No Response   | 1         | 6%          |
| <b>Total</b>  | <b>16</b> | <b>100%</b> |
| <b>5d. Would this increase other costs?</b>                             |           |             |
| Yes   | 12        | 75%         |
| No  | 3         | 19%         |
| No Response   | 1         | 6%          |
| <b>Total</b>  | <b>16</b> | <b>100%</b> |
| <b>Facility Inspection</b>  |           |             |
| <b>6. What type of inspection do you have?</b>                          |           |             |
| Custom  | 8         | 50%         |
| State   | 5         | 31%         |
| Federal   | 2         | 13%         |
| No Response   | 1         | 6%          |
| <b>Total</b>  | <b>16</b> | <b>100%</b> |
| <b>6a. How long have you been inspected under this classification?</b>  |           |             |
| Less than 1 year  | 0         | 0%          |
| 1 - 3 years   | 0         | 0%          |
| 3 - 7 years   | 5         | 31%         |
| 7 - 15 years  | 7         | 44%         |
| Over 15 years   | 2         | 13%         |
| No Response   | 2         | 13%         |
| <b>Total</b>  | <b>16</b> | <b>100%</b> |
| <b>6b. What has been your experience with this level of inspection?</b> |           |             |
| Extremely Dissatisfied  | 0         | 0%          |
| Dissatisfied  | 1         | 6%          |
| Neutral   | 1         | 6%          |
| Satisfied   | 9         | 56%         |

Appendix A

| Number of Responses by Question | Number    | Percent     |
|---------------------------------|-----------|-------------|
| Extremely Satisfied             | 4         | 25%         |
| No Response                     | 1         | 6%          |
| <b>Total</b>                    | <b>16</b> | <b>100%</b> |

6c. If you are custom or state, would you consider going to the next level of inspection?

|              |           |             |
|--------------|-----------|-------------|
| Yes          | 5         | 31%         |
| No           | 9         | 56%         |
| No Response  | 2         | 13%         |
| <b>Total</b> | <b>16</b> | <b>100%</b> |

6d. Would it help your daily operations to have a grader?

|              |           |             |
|--------------|-----------|-------------|
| Yes          | 0         | 0%          |
| No           | 15        | 94%         |
| No Response  | 1         | 6%          |
| <b>Total</b> | <b>16</b> | <b>100%</b> |

Cost and Finances

7. What are your highest variable costs?

|                |           |             |
|----------------|-----------|-------------|
| Labor          | 7         | 44%         |
| Utilities      | 7         | 44%         |
| Supplies       | 1         | 6%          |
| Transportation | 0         | 0%          |
| No Response    | 1         | 6%          |
| <b>Total</b>   | <b>16</b> | <b>100%</b> |

7a. Would you be willing to aggregate these costs with other facilities across the industry to lower costs to each?

|              |           |             |
|--------------|-----------|-------------|
| Yes          | 8         | 50%         |
| No           | 6         | 38%         |
| No Response  | 2         | 13%         |
| <b>Total</b> | <b>16</b> | <b>100%</b> |

7b. Have you considered restructuring your operation into a farmer-owned cooperative or LC3 to spread financial risk?

|              |           |             |
|--------------|-----------|-------------|
| Yes          | 2         | 13%         |
| No           | 12        | 75%         |
| No Response  | 2         | 13%         |
| <b>Total</b> | <b>16</b> | <b>100%</b> |

7c. Would you be interested in financing options and business assistance to upgrade our facility and/or operations?

|              |           |             |
|--------------|-----------|-------------|
| Yes          | 10        | 63%         |
| No           | 5         | 31%         |
| No Response  | 1         | 6%          |
| <b>Total</b> | <b>16</b> | <b>100%</b> |

7d. Would you be interested in learning about alternative energy options?

|     |    |     |
|-----|----|-----|
| Yes | 14 | 88% |
| No  | 1  | 6%  |

Appendix A

| Number of Responses by Question | Number    | Percent     |
|---------------------------------|-----------|-------------|
| No Response                     | 1         | 6%          |
| <b>Total</b>                    | <b>16</b> | <b>100%</b> |

7e. Would you be interested in investing in alternative energy options if assistance was available?

|              |           |             |
|--------------|-----------|-------------|
| Yes          | 13        | 81%         |
| No           | 2         | 13%         |
| No Response  | 1         | 6%          |
| <b>Total</b> | <b>16</b> | <b>100%</b> |

Operations

8. At what scale would you like to operate at?

|                  |           |             |
|------------------|-----------|-------------|
| Much Smaller     | 0         | 0%          |
| Somewhat Smaller | 0         | 0%          |
| No Change        | 6         | 38%         |
| Somewhat Larger  | 8         | 50%         |
| Much Larger      | 1         | 6%          |
| No Response      | 1         | 6%          |
| <b>Total</b>     | <b>16</b> | <b>100%</b> |

8a. What would it take to get to your desired scale?

|              |           |             |
|--------------|-----------|-------------|
| Capital      | 8         | 50%         |
| Labor        | 1         | 6%          |
| Supply       | 0         | 0%          |
| Other        | 0         | 0%          |
| No Response  | 7         | 44%         |
| <b>Total</b> | <b>16</b> | <b>100%</b> |

8b. What is the top limitation facing your operation?

|              |           |             |
|--------------|-----------|-------------|
| Labor        | 6         | 38%         |
| Capital      | 6         | 38%         |
| Demand       | 1         | 6%          |
| Supply       | 0         | 0%          |
| Other        | 2         | 13%         |
| No Response  | 1         | 6%          |
| <b>Total</b> | <b>16</b> | <b>100%</b> |

8c. If you had help or access to capital, would you make changes?

|              |           |             |
|--------------|-----------|-------------|
| Yes          | 12        | 75%         |
| No           | 3         | 19%         |
| No Response  | 1         | 6%          |
| <b>Total</b> | <b>16</b> | <b>100%</b> |

Miscellaneous

9. Do you think there needs to be better communication between producers and processors?

|              |           |             |
|--------------|-----------|-------------|
| Yes          | 14        | 88%         |
| No           | 1         | 6%          |
| No Response  | 1         | 6%          |
| <b>Total</b> | <b>16</b> | <b>100%</b> |

| Number of Responses by Question  | Number    | Percent     |
|--|-----------|-------------|
| <b>9a. Would you like to see an organization like MESAS develop a standard cut sheet?</b>  |           |             |
| Yes  | 7         | 44%         |
| No   | 7         | 44%         |
| No Response  | 2         | 13%         |
| <b>Total</b>   | <b>16</b> | <b>100%</b> |
| <b>9b. Should there be a standard contract developed between producer and processor?</b>   |           |             |
| Yes  | 6         | 38%         |
| No   | 7         | 44%         |
| No Response  | 3         | 19%         |
| <b>Total</b>   | <b>16</b> | <b>100%</b> |
| <b>10. What do farmers need to know to be better customers for you?</b>  |           |             |
| Scheduling   | 8         | 50%         |
| Pricing  | 1         | 6%          |
| Delivery Standards   | 1         | 6%          |
| Cut Sheets   | 1         | 6%          |
| Other  | 3         | 19%         |
| No Response  | 2         | 13%         |
| <b>Total</b>   | <b>16</b> | <b>100%</b> |
| <b>11. Do you have trouble disposing of your waste?</b>  |           |             |
| Yes  | 5         | 31%         |
| No   | 10        | 63%         |
| No Response  | 1         | 6%          |
| <b>Total</b>   | <b>16</b> | <b>100%</b> |
| <b>Expansion Opportuntiy</b>   |           |             |
| The project's goal is to expand red meat production in Maine. To add more throughput of Maine animals to the value chain. With this in mind please answer the following: |           |             |
| <b>12. Would you be willing to source more Maine grown animals?</b>  |           |             |
| Yes  | 15        | 94%         |
| No   | 0         | 0%          |
| No Response  | 1         | 6%          |
| <b>Total</b>   | <b>16</b> | <b>100%</b> |
| <b>13. Are you willing to expand to accommodate more Maine animals?</b>  |           |             |
| Yes  | 11        | 69%         |
| No   | 4         | 25%         |
| No Response  | 1         | 6%          |
| <b>Total</b>   | <b>16</b> | <b>100%</b> |

Appendix A

| Number of Responses by Question                                   | Number    | Percent     |
|---|-----------|-------------|
| <b>13a. How many more animals would you be willing to handle?</b> |           |             |
| 0 - 100   | 8         | 50%         |
| 101 - 250   | 2         | 13%         |
| 251 - 500   | 2         | 13%         |
| 501 - 1000  | 2         | 13%         |
| 1001 and over   | 0         | 0%          |
| No Response   | 2         | 13%         |
| <b>Total</b>  | <b>16</b> | <b>100%</b> |
| <b>13b. How many more pounds would you be willing to process?</b> |           |             |
| 0 - 10,000  | 7         | 44%         |
| 10,001 - 50,000   | 5         | 31%         |
| 50,001 - 200,000  | 1         | 6%          |
| 200,001 - 500,000   | 1         | 6%          |
| 500,001 and over  | 0         | 0%          |
| No Response   | 2         | 13%         |
| <b>Total</b>  | <b>16</b> | <b>100%</b> |
| <b>13c. How would you market this Maine meat?</b>                 |           |             |
| Process for Farmer  | 11        | 69%         |
| Distribute Yourself   | 2         | 13%         |
| Send Carcuses to Central Facility for Further Processing          | 0         | 0%          |
| Other   | 2         | 13%         |
| No Response   | 1         | 6%          |
| <b>Total</b>  | <b>16</b> | <b>100%</b> |



**Maine Sustainable Agriculture Society  
Slaughterhouse/Processor Survey  
May 26, 2014**

**Please Check  
the Response  
that Best Fits  
You**

**Survey Questions**

1. Do you operate a Red Meat Slaughterhouse, Processing Facility, or Both?

- Slaughterhouse
- Processing Facility
- Both

|  |
|--|
|  |
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|  |

1a. Do you use the facility only for your own use?

- Yes
- No

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|  |

**For Slaughterhouses**

2. Do you have a kill floor?

- Yes
- No

|  |
|--|
|  |
|  |

2a. How many beef cattle do you slaughter per year?

- 0 - 100
- 101 - 250
- 251 - 500
- 501 - 1000
- 1001 and over

|  |
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|  |

2b. How many hogs do you slaughter per year?

- 0 - 100
- 101 - 250
- 251 - 500
- 501 - 1000
- 1001 and over

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|  |

2c. How many sheep do you slaughter per year?

- 0 - 100
- 101 - 250

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|  |
|  |



251 - 500  
501 - 1000  
1001 and over

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|  |

2d. How many goats do you slaughter per year?

0 - 100  
101 - 250  
251 - 500  
501 - 1000  
1001 and over

|  |
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|  |

2e. How much wild game do you slaughter per year?

0 - 100  
101 - 250  
251 - 500  
501 - 1000  
1001 and over

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**For Processing Facilities**

3. Do you have a kill floor?

Yes  
No

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|  |
|  |

3a. How many pounds of beef do you process a year?

0 - 10,000  
10,001 - 50,000  
50,001 - 200,000  
200,001 - 500,000  
500,001 and over

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3b. How many pounds of pork do you process a year?

0 - 10,000  
10,001 - 50,000  
50,001 - 200,000  
200,001 - 500,000  
500,001 and over

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3c. How many pounds of lamb/mutton do you process a year?

0 - 10,000  
10,001 - 50,000

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|  |



50,001 - 200,000  
200,001 - 500,000  
500,001 and over

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3d. How many pounds of goat meat do you process a year?

0 - 10,000  
10,001 - 50,000  
50,001 - 200,000  
200,001 - 500,000  
500,001 and over

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3e. How many pounds of wild game do you process a year?

0 - 10,000  
10,001 - 50,000  
50,001 - 200,000  
200,001 - 500,000  
500,001 and over

|  |
|--|
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4. Do you offer other services?

Yes  
No

|  |
|--|
|  |
|  |

4a. If yes, what kind of service?

Smoking  
Curing  
Dry Aging  
Delivery  
Labelling

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|--|
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|  |

4b. How do you sell your meat?

Direct to Consumer  
Other Retailers  
Restaurants  
Institutions  
Food Processors

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|--|
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4c. Do you offer further processing?

Yes  
No  
If yes, What kind?

|  |
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|  |
|  |



**For Both**

**Season**

5. How many months a year do you operate?

- 1 to 3
- 3 to 6
- 6 to 9
- 9 to 12

|  |
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5a. What are your busiest months?

- January to March
- April to June
- July to September
- October to December

|  |
|--|
|  |
|  |
|  |
|  |

5b. Would you like to be busier during your down months?

- Yes
- No

|  |
|--|
|  |
|  |

5c. Would this require hiring more labor?

- Yes
- No

|  |
|--|
|  |
|  |

5d. Would this increase other costs?

- Yes
- No

|  |
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|  |
|  |

**Facility Inspection**

6. What type of inspection do you have?

- Custom
- State
- Federal

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6a. How long have you been inspected under this classification?

- Less than 1 year
- 1 - 3 years
- 3 - 7 years
- 7 - 15 years

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Over 15 years

6b. What has been your experience with this level of inspection?

Extremely Dissatisfied

Dissatisfied

Neutral

Satisfied

Extremely Satisfied

Comments:

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6c. If you are custom or state, would you consider going to the next level of inspection?

Yes

No

|  |
|--|
|  |
|  |

6d. Would it help your daily operations to have a grader?

Yes

No

|  |
|--|
|  |
|  |

Cost and Finances

7. What are your highest variable costs?

Labor

Utilities

Supplies

Transportation

|  |
|--|
|  |
|  |
|  |
|  |

7a. Would you be willing to aggregate these costs with other facilities across the industry to lower costs to each?

Yes

No

|  |
|--|
|  |
|  |

7b. Have you considered restructuring your operation into a farmer-owned cooperative or LC3 to spread financial risk?

Yes

No

|  |
|--|
|  |
|  |



7c. Would you be interested in financing options and business assistance to upgrade our facility and/or operations?

- Yes
- No

|  |
|--|
|  |
|  |

7d. Would you be interested in learning about alternative energy options to lower operating costs?

- Yes
- No

|  |
|--|
|  |
|  |

7e. Would you be interested in investing in alternative energy options if assistance were available?

- Yes
- No

|  |
|--|
|  |
|  |

Operations

8. At what scale would you like to operate at?

- Much Smaller
- Somewhat Smaller
- No Change
- Somewhat Larger
- Much Larger

|  |
|--|
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|  |
|  |
|  |
|  |

8a. What would it take to get to your desired scale?

- Capital
- Labor
- Supply
- Other

|  |
|--|
|  |
|  |
|  |
|  |

8b. What is the top limitation facing your operation?

- Labor
- Capital
- Demand
- Supply
- Other

|  |
|--|
|  |
|  |
|  |
|  |
|  |

8c. If you had help or access to capital, would you make changes?

- Yes
- No

|  |
|--|
|  |
|  |



Miscellaneous

9. Do you think there needs to be better communication between producers and processors?

- Yes
- No

|  |
|--|
|  |
|  |

9a. Would you like to see an organization like MESAS develop a standard cut sheet?

- Yes
- No

|  |
|--|
|  |
|  |

9b. Should there be a standard contract developed between producer and processor?

- Yes
- No

|  |
|--|
|  |
|  |

10. What do farmers need to know to be better customers for you?

- Scheduling
- Pricing
- Delivery Standards
- Cut Sheets
- Other
- If other, Explain

|  |
|--|
|  |
|  |
|  |
|  |
|  |

11. Do you have trouble disposing of your waste?

- Yes
- No
- If yes, Explain

|  |
|--|
|  |
|  |

Expansion Opportunity

The project's goal is to expand red meat production in Maine. To add more throughput of Maine animals to the value chain. With this in mind please answer the following:



12. Would you be willing to source more Maine grown animals?

Yes

No

|  |
|--|
|  |
|  |

13. Are you willing to expand to accommodate more Maine animals?

Yes

No

|  |
|--|
|  |
|  |

13a. How many more animals would you be willing to handle?

0 - 100

101 - 250

251 - 500

501 - 1000

1001 and over

|  |
|--|
|  |
|  |
|  |
|  |
|  |

13b. How many more pounds would you be willing to process?

0 - 10,000

10,001 - 50,000

50,001 - 200,000

200,001 - 500,000

500,001 and over

|  |
|--|
|  |
|  |
|  |
|  |
|  |

13c. How would you market this Maine meat?

Process for Farmer

Distribute Yourself

Send Carcasses to Central Facility for Further Processing

Other

If other, Explain

|  |
|--|
|  |
|  |
|  |
|  |



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## MAINE SUSTAINABLE AGRICULTURE SOCIETY

---

“Living Soils, Prosperous Farms, Healthy Communities”

### MESAS Board

March 29, 2014

**Nanne Kennedy,  
President,  
Meadowcroft Farm**

«ESTABLISHMENT»

«ADDRESS»

«Town», «State» «Zip»

**Penelope Jordan,  
Vice President,  
Jordan’s Farm**

Two years ago, the Maine Sustainable Agriculture Society (MESAS) launched a project called *More Maine Meat*. The purpose of the project is to improve economic returns for livestock producers in Maine, growing the meat industry in the state with more forage-based resources, and to improve the overall value chain for the red meat industry satisfying a larger proportion of Maine and New England’s demand for meat.

**Bill Eldridge,  
Secretary/Treasurer  
MOO Milk**

MESAS coordinates a Working Group of stakeholders representing farmers, slaughterhouses, processors, University of Maine Cooperative Extension, State of Maine, Agriculture Trade Groups and consumers. This working group has met twice over the last two years to identify goals and objectives of the project.

**Dick Brzozowski,  
UMaine CE**

**Molly Clark, Cold  
Spring Ranch**

As part of the project the Society received a small grant from the Horizon Foundation to conduct surveys of producers and processors to help shape the strategies that the Working Group can focus on. The producer survey was conducted by the University of Maine Cooperative Extension and has been completed. A summary of the findings was presented at the Ag Trade Show in January. To complete this portion of the project we are now ready to conduct the slaughterhouse/processor survey.

**Barry Higgins,  
Maple Lane Farms**

In a few days you will be contacted by an intern, Rebecca Champion, who is working with the Society to complete the survey. This will be a phone survey and she will be asking you a series of questions. The survey should not take more than 30 minutes of your time. Please help us by talking with Rebecca and answering the questionnaire.

**Ellen Mallory,  
UMaine CE**

Your responses will assist the Working Group identify the best strategies to help grow the red meat industry in Maine and increase revenues for the entire value chain.

**Brendan McQuillan,  
Morning Dew Farm**

On behalf of the Maine Sustainable Agriculture Society I want to thank you for helping with this portion of the project by taking the time to answer the survey. Your individual responses will be kept confidential. The results of the survey will be aggregated for presentation to the Working Group. If you have any questions please do not hesitate to call me.

**Ron Poitras, Small  
Potatoes Farm**

Sincerely,

Mark Hews, Executive Director  
Maine Sustainable Agriculture Society

**Paul Schultz, King  
Hill Farm**



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## MAINE SUSTAINABLE AGRICULTURE SOCIETY

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“Living Soils, Prosperous Farms, Healthy Communities”

### MESAS Board

May 27, 2014

**Nanne Kennedy,**  
President,  
Meadowcroft Farm

«ESTABLISHMENT»

«ADDRESS»

«Town», «State» «Zip»

**Penelope Jordan,**  
Vice President,  
Jordan’s Farm

Two years ago, the Maine Sustainable Agriculture Society (MESAS) launched a project called *More Maine Meat*. The purpose of the project is to improve economic returns for livestock producers in Maine, growing the meat industry in the state with more forage-based resources, and to improve the overall value chain for the red meat industry satisfying a larger proportion of Maine and New England’s demand for meat.

**Bill Eldridge,**  
Secretary/Treasurer  
MOO Milk

MESAS coordinates a Working Group of stakeholders representing farmers, slaughterhouses, processors, University of Maine Cooperative Extension, State of Maine, Agriculture Trade Groups and consumers. This working group has met twice over the last two years to identify goals and objectives of the project.

**Dick Brzozowski,**  
UMaine CE

**Molly Clark, Cold  
Spring Ranch**

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**Barry Higgins,**  
Maple Lane Farms

**Ellen Mallory,**  
UMaine CE

Please find attached a printed copy of the survey. This is a straight forward survey that will take about 20 – 30 minutes of your time. You simply need to check the response to each question that best fits your situation. Once complete please mail the survey back to the address below.

**Brendan McQuillan,**  
Morning Dew Farm

**Ron Poitras, Small  
Potatoes Farm**

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**Paul Schultz, King  
Hill Farm**

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Sincerely,

Mark Hews, Executive Director  
Maine Sustainable Agriculture Society