

## **Business Surveys**

A phone survey of local business that potentially purchase meat was conducted to estimate current and potential demand of local meat. A list of 74 business, which primarily consisted of restaurants, but also included some hotels and grocers, was constructed with the help of community members as well as internet research to attempt to construct an inclusive list of West End businesses.

Survey collection began May 1, 2020 and concluded on August 3, 2020. The survey extended over a significant period of time due to the COVID-19 pandemic. Because of the pandemic, many businesses appeared to be closed and were unable to be reached, even as multiple attempts were made over the course of the summer. A total of 12 businesses were reached over this period of time, with eight respondents completing 100 percent of the survey. The remaining four respondents finished a portion of the survey and their responses are also included in the analysis.

Respondents were first asked who their current meat supplier is, and responses were incredibly varied. Listed meat suppliers included Callaway, US Foods, Coleman, Kinikin, Gravy Brothers, Taylor Quality Meats, Shamrock, Laid Back Ranch, Vicky's, Farm Runners, Mavrick Ranch, and Cisco. Shamrock and Cisco were the only suppliers appearing in multiple responses, with two tallies for Shamrock, and four tallies for Cisco. One respondent indicated that they do not purchase meat, so their survey was terminated after this question.

Next, respondents were asked whether they would be interested in purchasing meat produced in the West End region (west Montrose, Ouray, and San Miguel Counties). Seven respondents indicated they would be interested in purchasing local meat, with an additional three respondents indicating they may be interested. Only one respondent indicated they would not be interested.

Moving to the next question, responses dropped down to the final eight respondents who completed the survey. Six of these eight indicated they would be willing to pay a price premium for local meat, while one indicated they may be willing to pay a price premium, and one individual indicated they would not be willing.

Respondents were then asked to rank their preference between serving local, grass-fed, or organic meat. Seven of the eight respondents indicated they would prefer to serve local meat over grass-fed or organic, with grass-fed receiving the remaining first place vote. The second place spot between grass-fed and organic was closer, with grass-fed receiving five tallies, and organic receiving two.

To measure the concern of consistency in the taste and quality of local and grass-fed beef, respondents were asked whether they, or their patrons, had their concern with local, grass-fed, or both types of meat. Five respondents indicated that they had concern over the consistency of taste and quality of both local and grass-fed beef, while two indicated they have concerns for only grass-fed, and one indicated they have no concerns.

Regarding the consistency in availability of local meat, six respondents indicated that they would still be willing to purchase local meat when it is available, even if it is not consistent. The remaining two respondents indicated they would not be willing to purchase local meat if it was not consistently available.

Moving on to preferences between purchasing fresh and frozen meats, four respondents indicate they do have a preference between fresh and frozen, and an additional four indicated they did not have a preference. Those that indicated they do have a preference indicated which they prefer. Two indicated they prefer fresh, while one respondent indicated it depends on the cost as to which they prefer. One respondent did not respond to the question. In the final question regarding fresh or frozen preferences, respondents were asked whether they would be willing to purchase frozen meat if it was produced locally. Only two of the eight respondents indicated they would be willing to purchase frozen if it was produced locally.

Finally, respondents were asked about their purchasing habits for beef, chicken, sheep/goats, pork, and wild game. Raw response data is displayed in each table below. It should be noted that some respondents refused to give price data for their purchasing and that some purchasing quantities appear to be much larger than is reasonable. This could be due to individuals responding on a yearly purchasing basis as opposed to the weekly basis that was asked of them.

<b>Meat Purchasing Habits of Respondents</b>		
<b>Beef</b>		
Cuts of Beef Most Commonly Purchased Each Week	Average Pounds Purchased per Week	Price Paid per Pound for Each Cut
Ground Beef	80 lbs	3.62
Ribeye, Bison	30 lbs each	
Ground Beef, Round, Rib,	8000	
Steak, Ground Beef	10 lbs	
Ground, Sausage, Ribeye,	10 lbs	4.00
Ground Chuck	30 lbs	6.00
Steak, Beef		
New York, Flank, Skirt		35 lbs
<b>Chicken</b>		
Cuts of Chicken Most Commonly Purchased Each Week	Average Pounds Purchased per Week	Price Paid per Pound for Each Cut
Breast	5000 lbs	
Breast	5000 lbs	1.56
Breast, Thigh	80 lbs	
All Cuts	10 lbs	
All Cuts		
Breast, Whole Chicken	30 lbs	
<b>Pork</b>		

Cuts of Pork Most Commonly Purchased Each Week	Average Pounds Purchased per Week	Price Paid per Pound for Each Cut
	8 lbs	
Farm Raised		
	10 lbs	
Loin and Tenderloin	20 lbs	
<b>Sheep/Goat</b>		
Cuts of Sheep/Goat Most Commonly Purchased Each Week	Average Pounds Purchased per Week	Price Paid per Pound for Each Cut
Whole Lamb, Local		8.00
<b>Wild Game</b>		
Cuts of Wild Game Most Commonly Purchased Each Week	Average Pounds Purchased per Week	Price Paid per Pound for Each Cut
Elk	10 lbs	

### **Business Survey Summary**

While the response numbers were lower in regard to the population for this survey, if it is representative of the population it indicates that there is interest in purchasing locally grown meats amongst West End businesses. Seven respondents indicated they would be interested in purchasing meat, with an additional three indicated they may be interested. Only one respondent indicated they would not be interested. Additionally, when given the option between serving locally-grown, organic, or grass-fed, seven of the eight respondents indicated they would be interested in serving locally-grown as opposed to either organic or grass-fed. Respondents did seem, however, to prefer fresh meat over frozen.

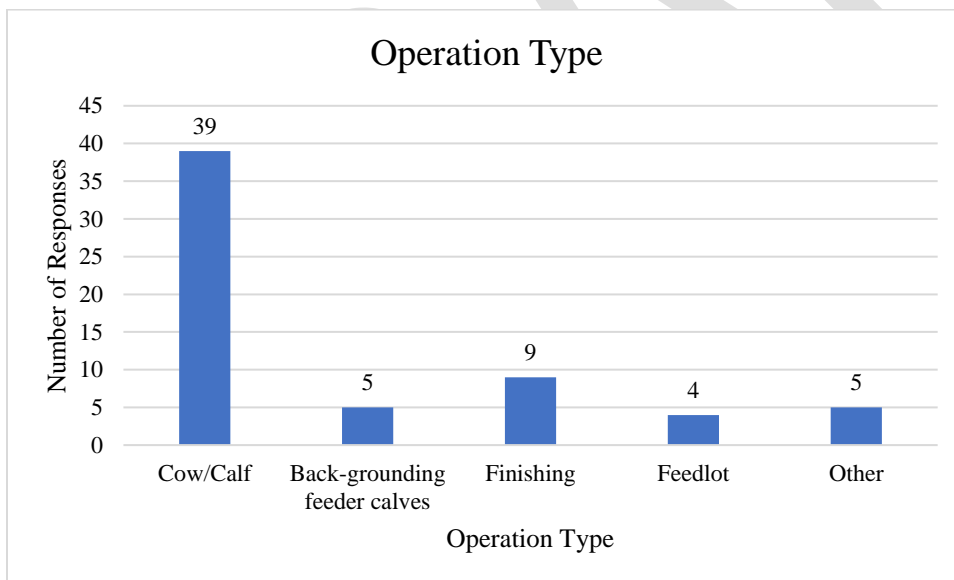
## Producer Surveys

Four producer surveys were conducted through an online survey tool. These four surveys targeted beef producers, hog producers, sheep and goat producers, and wild game hunters. The surveys were published February 21, 2020 and closed on August 20, 2020. The goal of the surveys were to estimate the amount of product that has the potential to be processed locally, as well as the interest producers and hunters have in sending their meat to either a new or updated meat processing facility in the region.

### Beef Survey Results

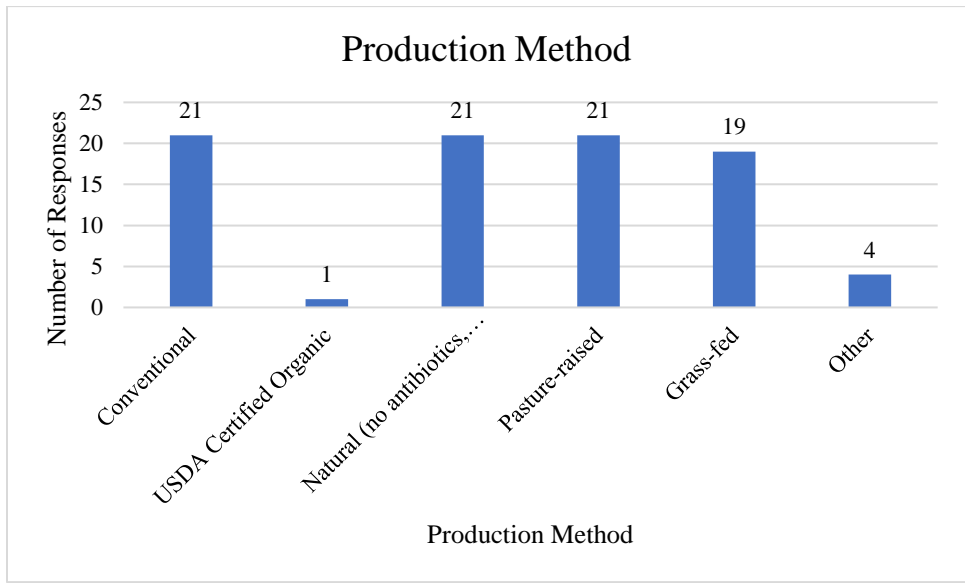
Over the course of the survey, 69 individuals opened the survey link, with 38 individuals completing 100 percent of the survey. An additional three respondents partially completed the survey with reportable responses. Many of the survey questions allowed for multiple responses, which is why some questions may appear to have more responses than number of total completed responses.

Regarding operation type, respondents were asked to indicate which option best describes their operation. Response choices included cow/calf, back-grounding feeder calves, finishing, feedlot, and other. The majority of producers (39 responses) indicate that they are a cow/calf operation, with finishing cattle coming in at a distant second (nine responses). “Other” responses included “backyard cattle raising”, “breeding seed stock”, “direct to consumer”, “4H”, and “two calves”.



Next, respondents were asked to describe their beef production method. Response choices included conventional, USDA certified organic, natural (no antibiotics, no hormones, etc.), pasture-raised, grass-fed, and other. Responses were fairly even distributed between conventional, natural, pasture-raised, and grass-fed, with conventional, natural, and pasture-raised each receiving 21 responses, and grass-fed receiving 19. “Other” responses included

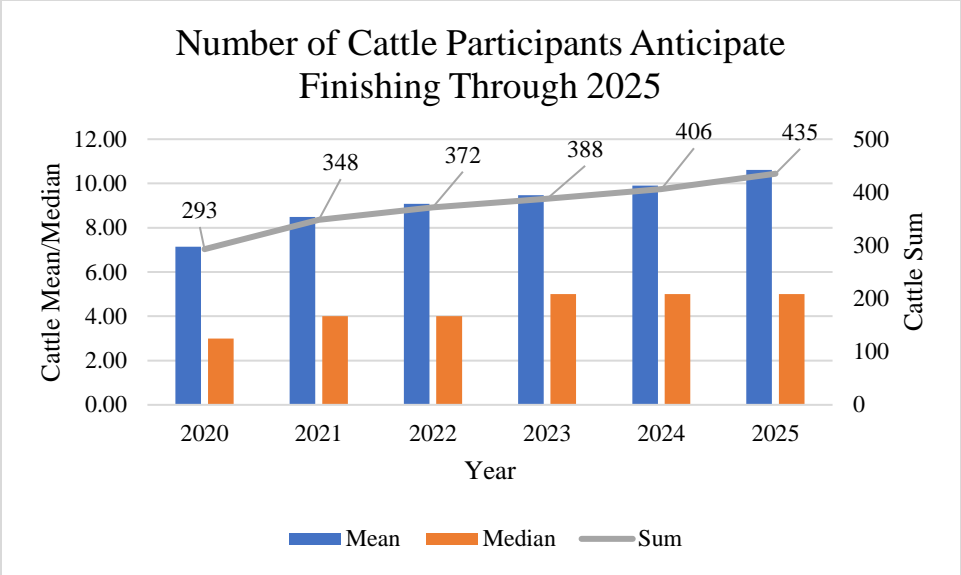
“small scale”, “USDA Triangle Stamp”, “grain-fed”, and “natural could be easily achieved with additional record keeping”.



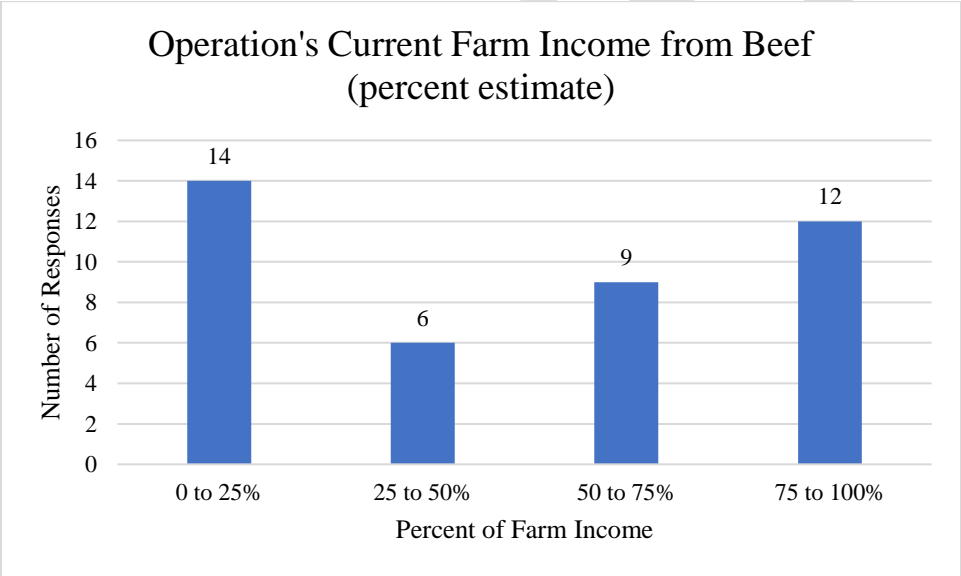
To determine average size of herd, respondents were asked to indicate the average number of head they raise in cow/calf pairs, feeder calves, finished cattle, and bulls. The following table illustrates descriptive statistics from this question and the large difference between the mean and median likely indicates that there are a much higher number of smaller operations, but the significantly larger operations cause the mean values to skew larger. The average number of finished cattle is 6.1, with the mode of the dataset being 2.0. Out of the 41 respondents, the sum of all finished cattle is 249.

Average Number of Cattle Raised Each Year								
Cattle Type	Mean	Median	Mode	Min	25th Percentile	75th Percentile	Max	Sum
Cow/Calf Pairs	156.2	45.0	20.0	0.0	12.5	97.5	1400.0	6402.5
Feeder Calves	70.2	2.0	0.0	0.0	0.0	37.5	1200.0	2880.0
Finished Cattle	6.1	2.0	0.0	0.0	0.0	8.0	50.0	249.0
Bulls	6.4	1.0	0.0	0.0	0.0	3.5	70.0	261.5

The following question asked respondents to indicate the number of cattle they anticipate finishing from 2020 to 2025. Similar to the previous table, the median and mean show some differences indicating that more operations are smaller. The following chart illustrates the mean, median, and sum of the data for the 41 respondents over the course of the six years. The sum of finished cattle is 293, slightly above that indicated in the previous question. It can also be seen that the number of cattle individuals anticipate finishing increased each year and results in a value of 435 in the final estimated year.



The next question sought to determine the percent of the operation’s farm income that came from the sale of beef cattle. This figure seems to reinforce the idea that there are a significant number of small, hobby farmers, in addition to the larger operations that receive a significant portion of their income from the sale of beef.



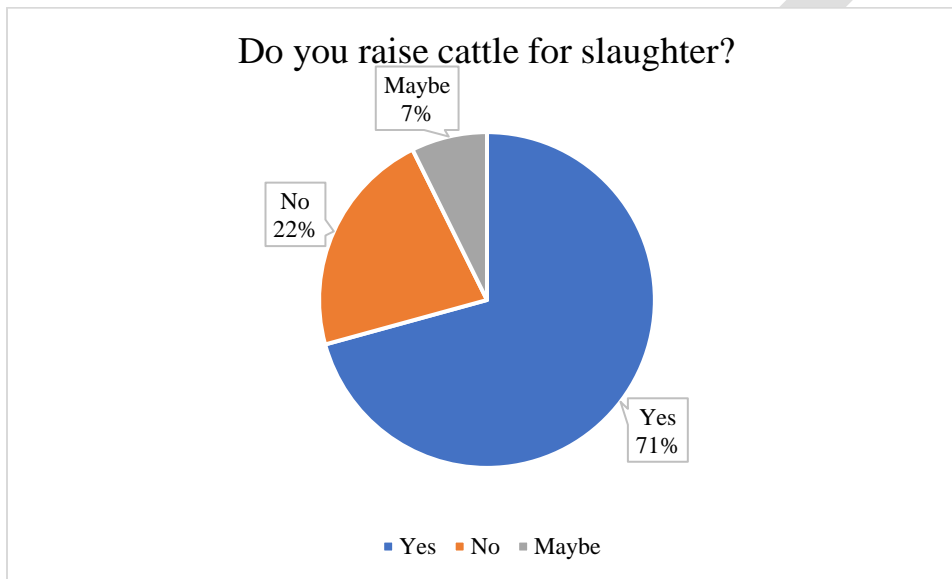
This idea may be again reinforced by the number of acres the respondents currently have in farmland. While the mean of the data set was nearly 1,200 acres, the median drops to 250 acres.

Number of Acres in Farmland						
Mean	Median	Mode	Min	25th Percentile	75th Percentile	Max
1196.4	250	80	5.4	88	1350	8500

Further, the number of acres that respondents have in pasture is described by the statistics illustrated in the following table.

Number of Acres in Pasture						
Mean	Median	Mode	Min	25th Percentile	75th Percentile	Max
1023.961	150	150	5.4	60	750	8500

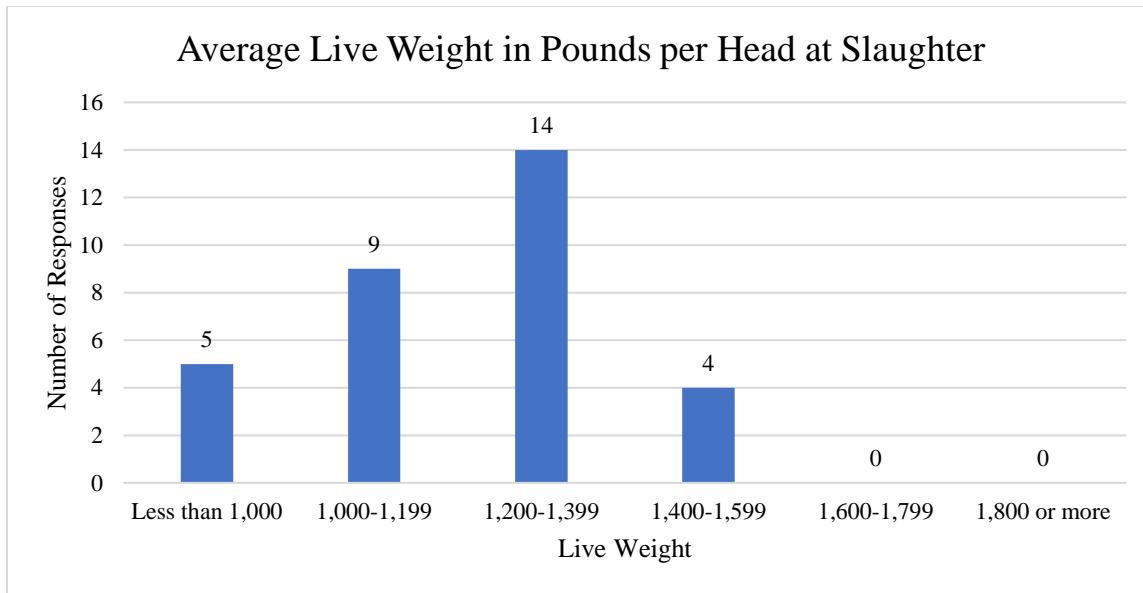
Moving back to the slaughter of cattle, the majority of respondents (29 responses) indicated that they raise cattle for slaughter.



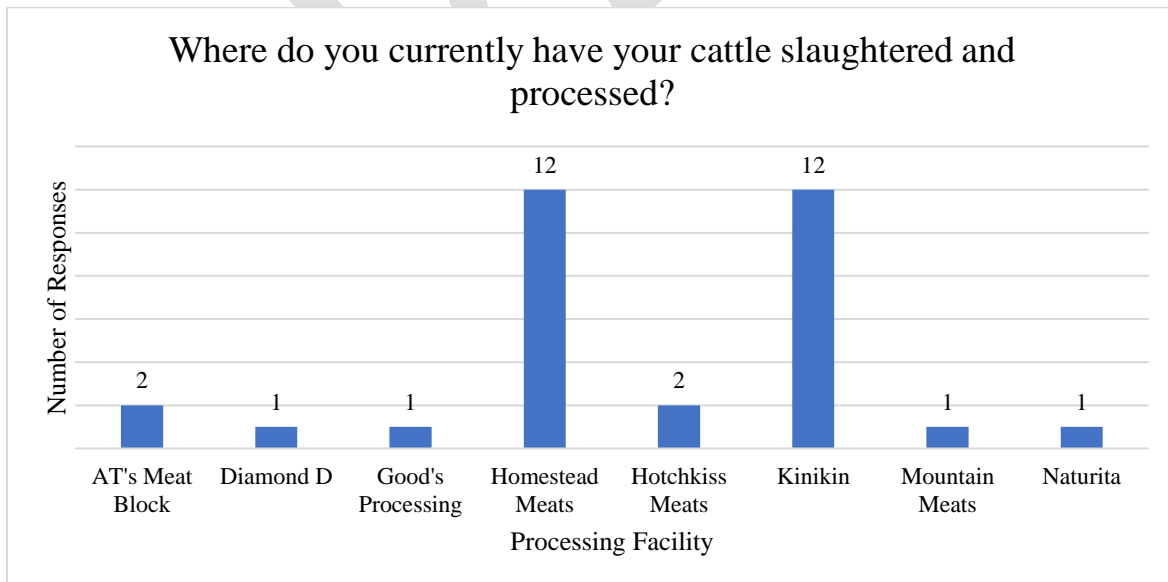
However, the mean and median again differ fairly significantly when those that do raise cattle for slaughter were asked how many are slaughtered in a typical year.

Number of Cattle Slaughtered in a Typical Year						
Mean	Median	Mode	Min	25th Percentile	75th Percentile	Max
31.34375	5	2	1	2	11.5	750

Most respondents also indicated that their cattle weight between 1,200 and 1,399 pounds at slaughter.



Respondents were then given the opportunity to indicate where they currently have their cattle slaughtered and processed. Respondents were allowed to enter their own answer as opposed to selecting from a pre-determined list. Homestead Meats and Kinikin were the two most popular facilities, with each receiving 12 responses.

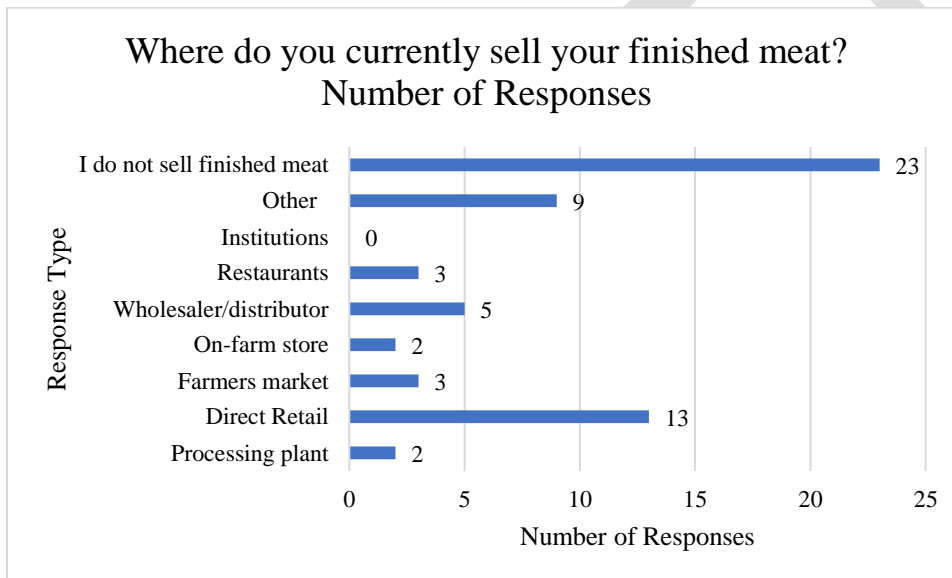


Respondents are driving an average of 73 one-way miles to take their cattle to slaughter, with a median of 80 miles, indicating that range is a fairly accurate depiction of actual miles traveled.

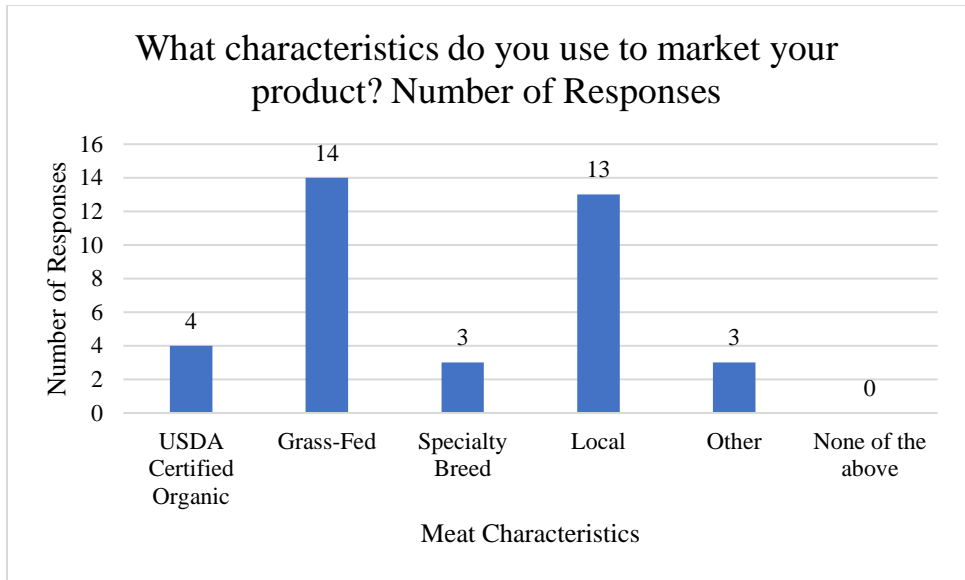


Please indicate the distance in one-way miles that you currently travel to take your cattle to slaughter.						
Mean	Median	Mode	Min	25th Percentile	75th Percentile	Max
72.75	80	100	2	51	100	150

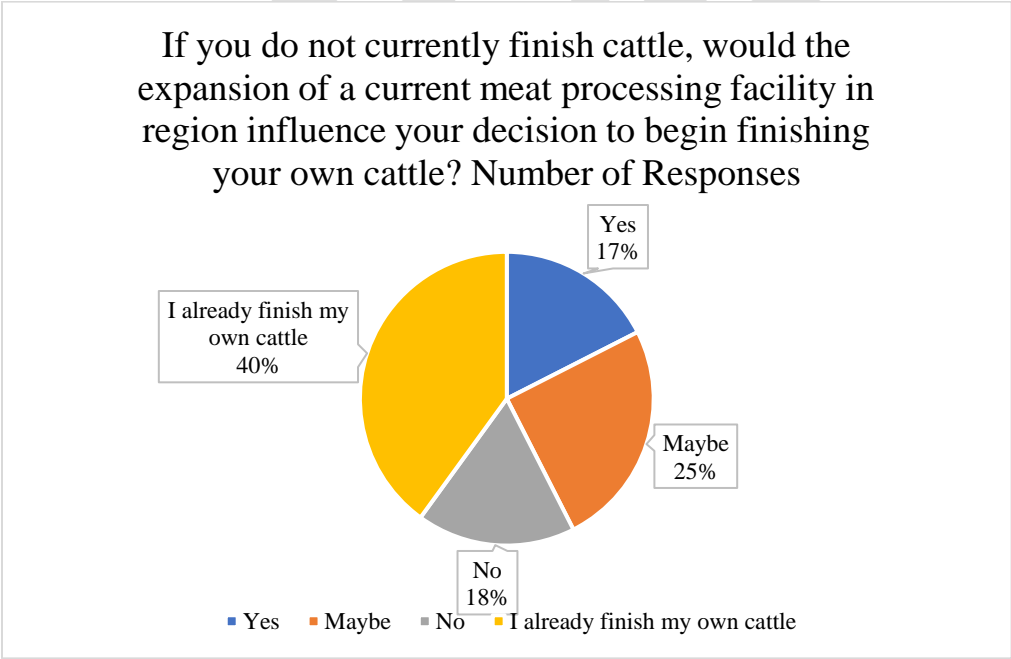
Regarding the sale of finished meat, respondents were asked where they currently sell their finished meat. Response choices included processing plant, direct retail, farmers market, on-farm store, wholesaler/distributor, restaurants, institutions, other, and I do not sell finished meat. 23 respondents indicated that they do not sell finished meat, while 13 indicated they sell direct retail, and nine selecting the “other” category. The low selection values for some other categories may indicate a market opportunity for meat sales in different arenas. Responses included in the “other” category included “family”, “online through website”, “friends”, “distributors”, “keep for food”, “1/2 and wholes”, “friends and family”, “CSA program & fresh food hub”, and “family”.



Next, respondents were asked what characteristics they use to market their product. Response choices included USDA certified organic, grass-fed, specialty breed, local, other, and none of the above. The two most popular choice were grass-fed and local, with 14 and 13 responses respectively. “Other” responses included “humanely raised”, “healthiest meat, unique best flavor, yaks”, and “grain fed”.

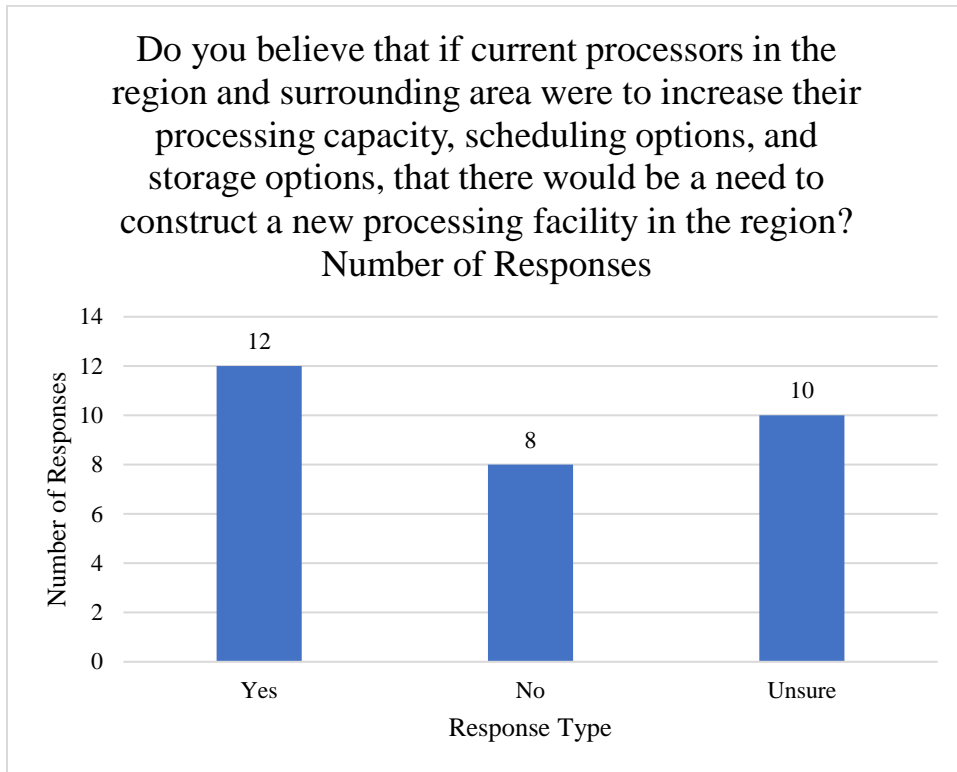


Moving to the expansion of a current meat processing facility in the region, respondents were asked whether the expansion of a current meat processing facility would influence their decision to begin finishing their cattle. Response choices included yes, maybe, no, and I already finish my own cattle. While the majority indicated that they already finish their own cattle, 17 percent indicated this would influence their decision, and another 25 percent selected “maybe”, indicating that the expansion may influence their decision.

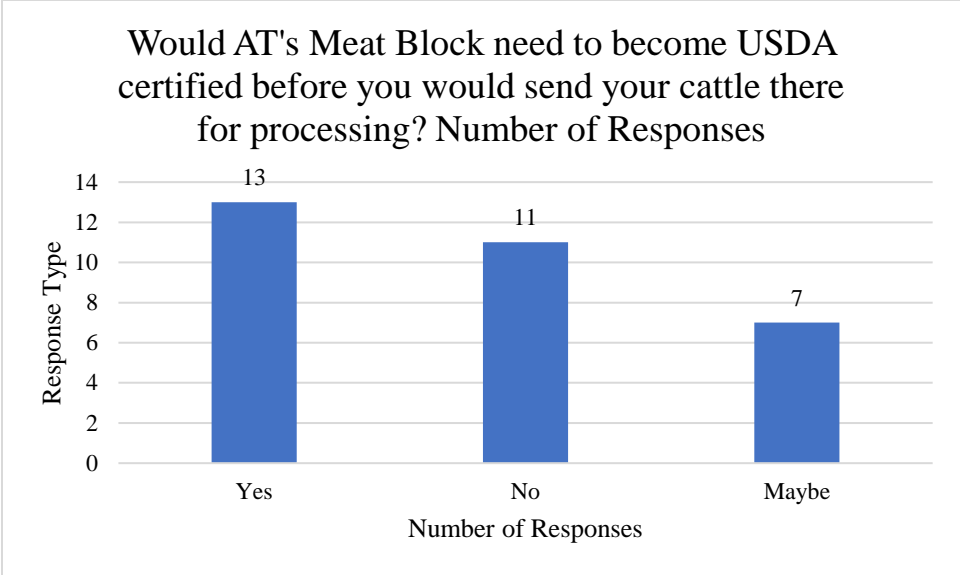


Regarding the issue of expansion of a current facility, or the construction of a new facility, respondents were asked whether they felt that a new facility would be necessary if a current facility in the region had their capacity expanded. Responses were fairly mixed to this question,

with 12 indicating that yes, a new facility would still be necessary, ten indicating they were unsure, and eight indicating they think a new facility would not need to be constructed if a current facility was expanded.

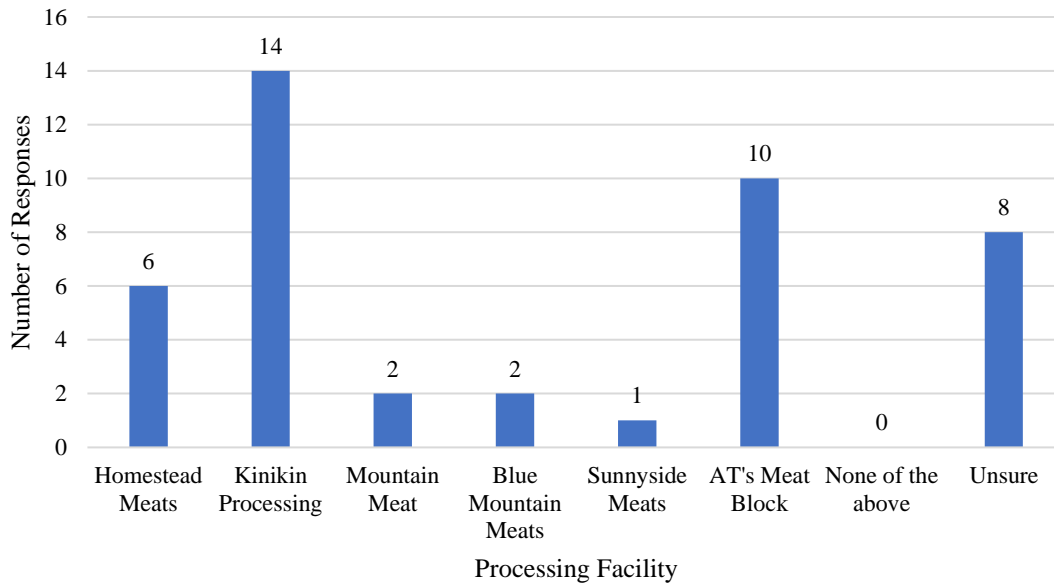


AT's Meat Block was asked to be included in the survey of producers to determine respondent interest in the facility becoming USDA certified. As with the last question, responses were mixed, with 13 respondents indicating that the facility would need to be USDA certified to send their cattle there for processing and 11 indicating that the facility would not need to be USDA certified.

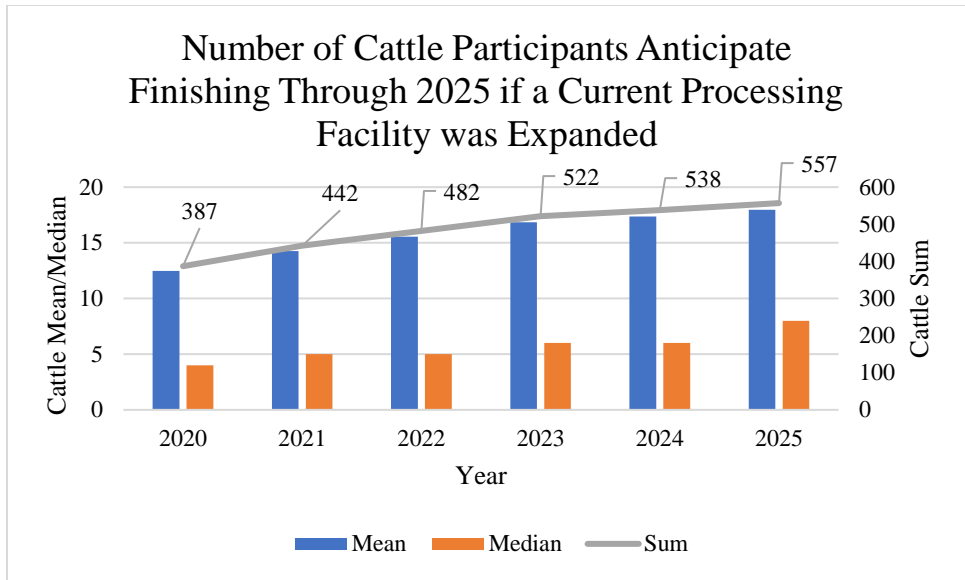


To determine which of the current facilities would be most beneficial to producers if it were to be expanded, respondents were given a list and asked to select which would benefit their operation the most if it were to increase its processing and storage capacities. The list of processing facilities included Homestead Meats, Kinikin Processing, Mountain Meat, Blue Mountain Meats, Sunnyside Meats, AT's Meat Block, none of the above, and unsure. Kinikin Processing received the most responses with 14, with AT's Meat Block coming in second with ten responses.

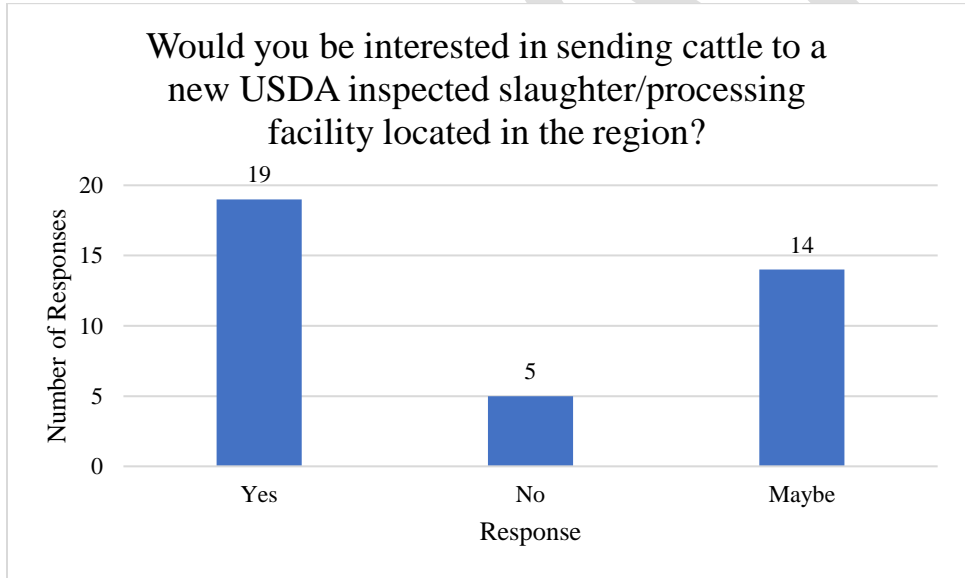
Of the processing facilities described in the previous question, which location(s) would most benefit your farming operation if it were to expand its processing capacity and increase available storage? It is assumed that capacity expansion would decrease



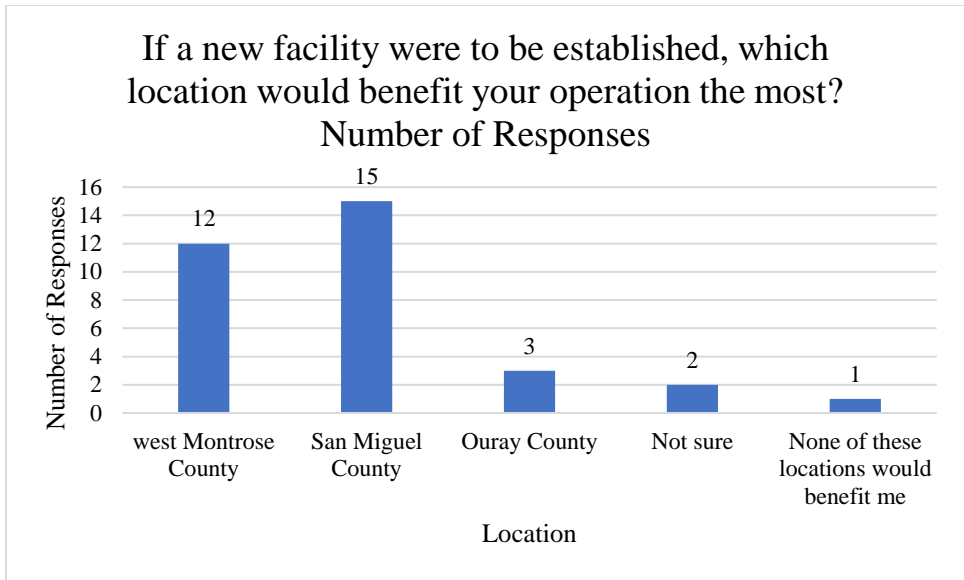
To determine whether there may be an effect on cattle production resulting from the expansion of a current processing facility, respondents were asked how many cattle they anticipate finishing from 2020 to 2025 if a current facility was expanded. The following table illustrates the mean, median, and sum number of finished cattle. When this question was asked previously under the assumption that all things remain constant, the sum of finished cattle ranged from 293 in 2020 to 435 in 2025. With the expansion of a current facility, this range increases to 387 in 2020 to 557 in 2025. This illustrates a roughly 30 percent increase in estimated production over the course of the six years if a current facility was expanded.



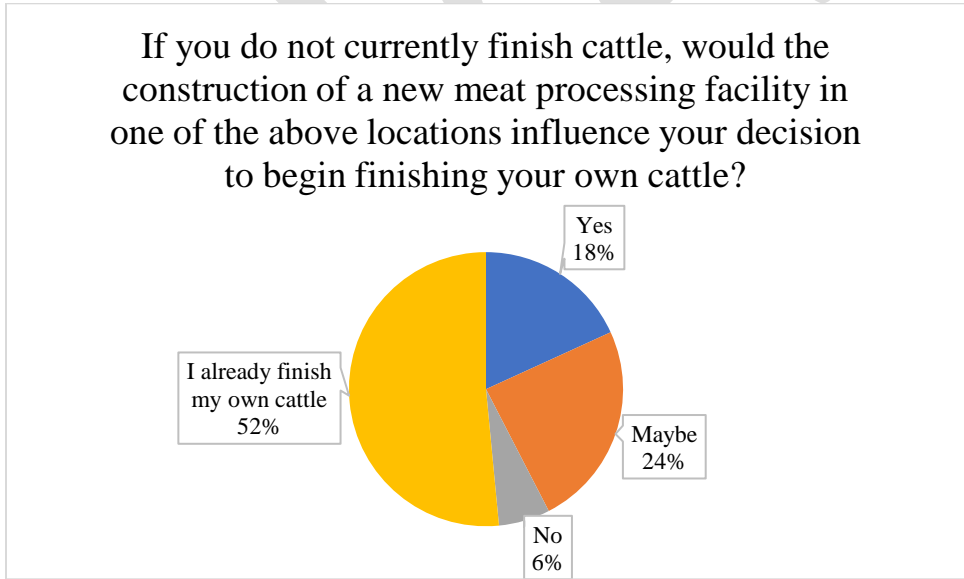
Moving on to the construction of a new facility, respondents were asked whether they would be interested in sending cattle to a new USDA inspected slaughter/processing facility. 19 respondents indicated they would be interested, with an additional 14 indicating they may be interested.



To help determine the optimal location for a new facility, respondents were asked to select the potential location that would most benefit them. Response choices included west Montrose County, San Miguel County, Ouray County, not sure, and none of these locations would benefit me. West Montrose County and San Miguel County were overwhelming more popular than Ouray County with 12 and 15 responses, respectively.

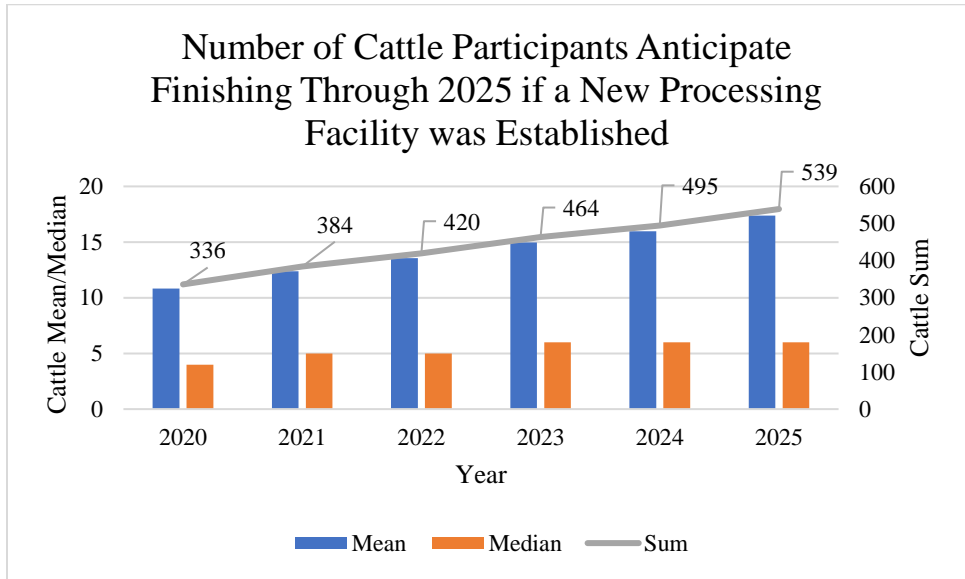


When asked whether the construction of a new meat processing facility would influence their decision to begin finishing cattle, the responses followed a similar trend to when this question was asked of expanding a current facility. While 18 percent do indicate that this would influence their decision, this is only a one percent increase compared to when the question was asked previously. This indicates that there does not seem to be a preference between a new or expanded facility when it comes to the decision of whether or not to finish cattle. However, there may be differences when it comes to the number of cattle being finished.



Interestingly, when asked to indicate the total number of head they would finish between 2020 and 2025 if a new facility was constructed in the region, the sums in 2020 and 2025 are slightly lower than when asked the same questions regarding an expansion of a current facility. In the previous question, these sums were 387 and 557, respectively. With the construction of a new

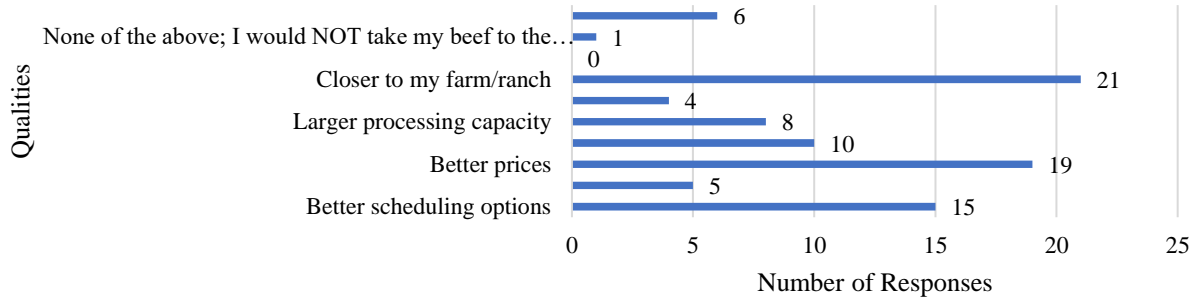
facility, these numbers slightly decrease to 336 for 2020 and 539 in 2025. However, this is still a 15 percent and 24 percent increase, respectively compared to the same two years in the original question where it was assumed all things remained the same. A conclusion can be drawn that producers may be willing to increase the number of cattle they finish if there are improved facilities for them to send their cattle to.



Producers were then asked what qualities a new facility would need to have for them to choose to bring their beef there. Response choices included better scheduling options, better communication, better prices, more storage, larger processing capacity, delivery, closer to my farm/ranch, none of the above; I would take my beef to the new facility regardless of these factors, none of the above; I would NOT take my beef to the new facility regardless of these factors, and other. The most popular response choices were closer to my farm/ranch, better prices, and better scheduling options, with 21, 19, and 15 responses respectively. “Other” responses included “allow for hanging 21 days of my meat”, “a small facility where my animals are not standing around”, “honesty and responsibility, customer service”, “quality”, better quality than AT's”, “need a feedlot”.

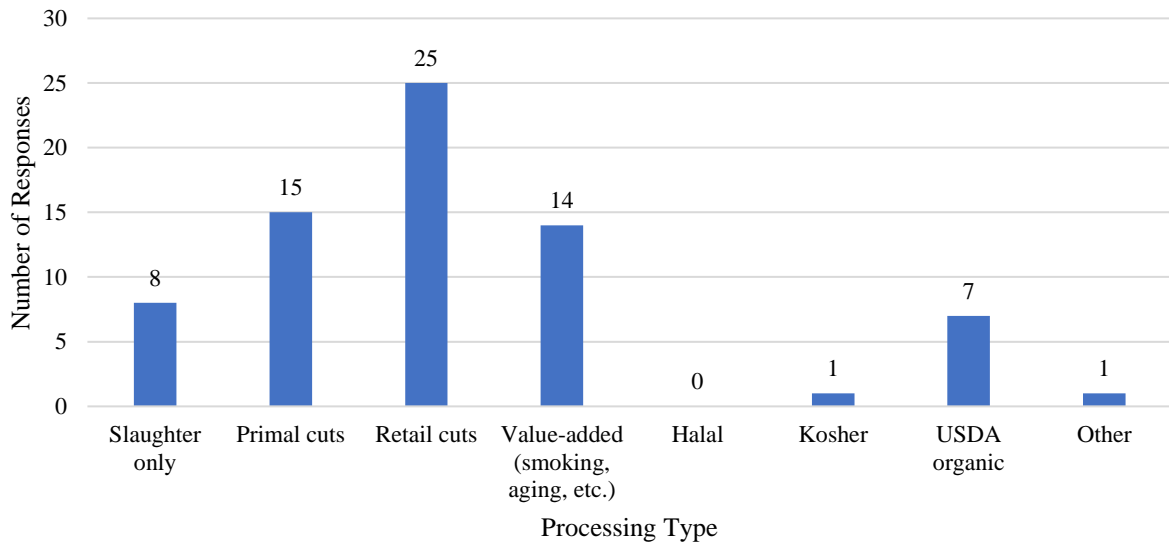


If a new meat processing facility were to be established, what qualities would it need for you to choose to bring your beef there?

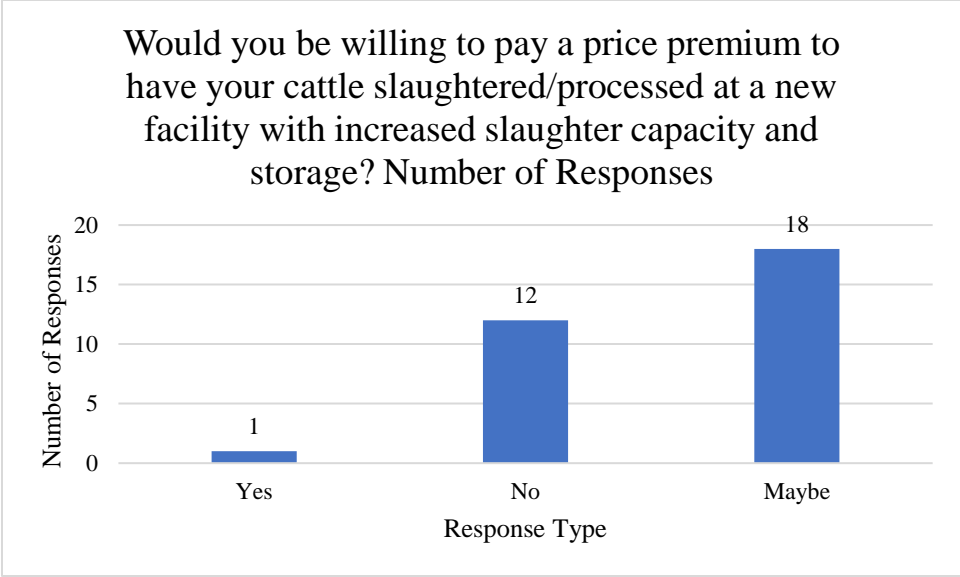


Respondents were then asked what type of processing they would like available to them. Response choices included slaughter only, primal cuts, retail cuts, value-added (smoking, aging, etc.), halal, kosher, USDA organic, and other. The most popular response was retail cuts with 25 responses, with primal cuts and value-added each garnering 15 and 14 responses, respectively.

What type of processing would you like to have available for your cattle?



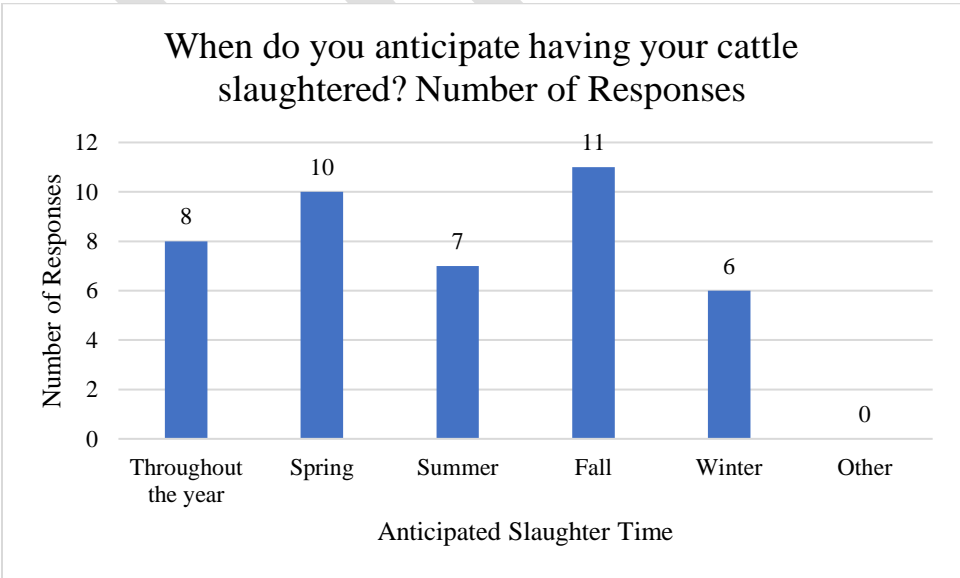
When asked whether they would be willing to pay a price premium to have their cattle slaughtered/process at a new facility, the majority of respondents indicated they may be willing to pay a price premium, but a large proportion also indicated they would not be willing to pay a price premium.



However, respondents indicated they would be willing to travel approximately 90 to 100 one-way miles to have their cattle processed, which is an increase from the 73 to 80 they currently travel.

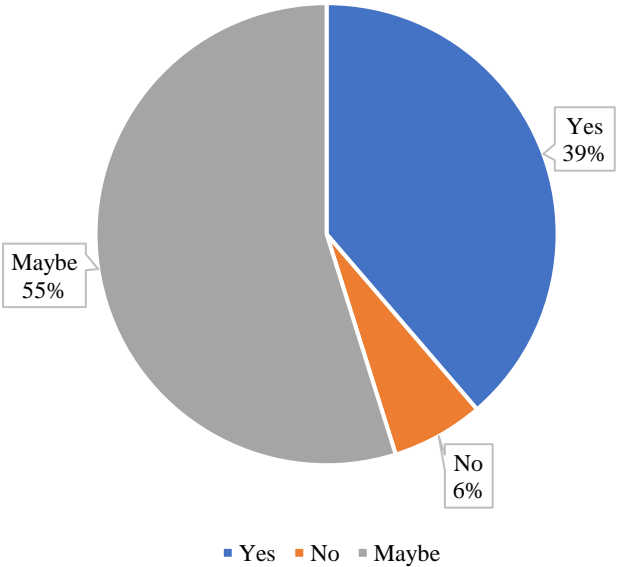
What is the maximum distance (one-way) you are willing to travel to have your cattle processed?						
Mean	Median	Mode	Min	25th Percentile	75th Percentile	Max
90	100	100	20	80	100	200

Time of slaughter is also an important factor when it comes to scheduling. When asked what time of year respondents intend to slaughter their cattle, responses were fairly evenly distributed, with winter being the least popular time of year.

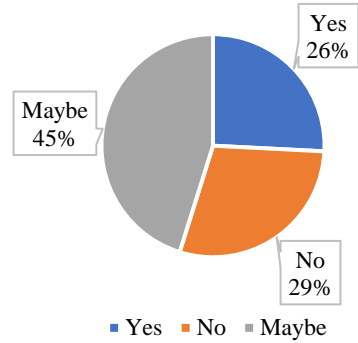


Regarding branding of the product, respondents were asked whether they would be interested in selling their meat to the facility as part of a brand. Brand choices presented to the respondents included “Colorado Branded Beef”, grass-fed beef, and USDA certified organic beef. The most popular branding option was Colorado Branded Beef, with USDA certified organic being the least popular option.

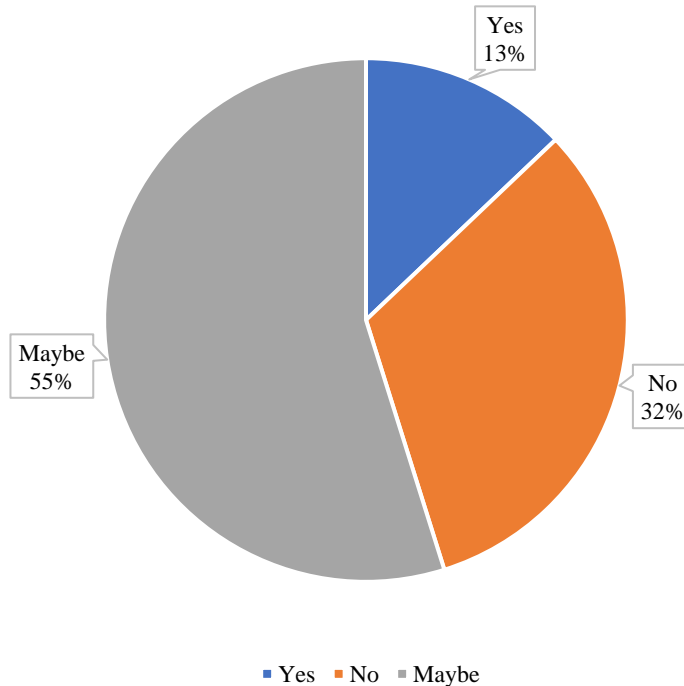
If a processing facility were to develop and market a brand of locally raised meat, such as "Colorado Branded Beef", would you be interested in selling your meat (specific cuts or whole animals) to the facility?



If a processing facility were to develop a grass-fed beef brand, would you be willing to raise your cattle as grass-fed and sell your meat (specific cuts or whole animals) to the facility?



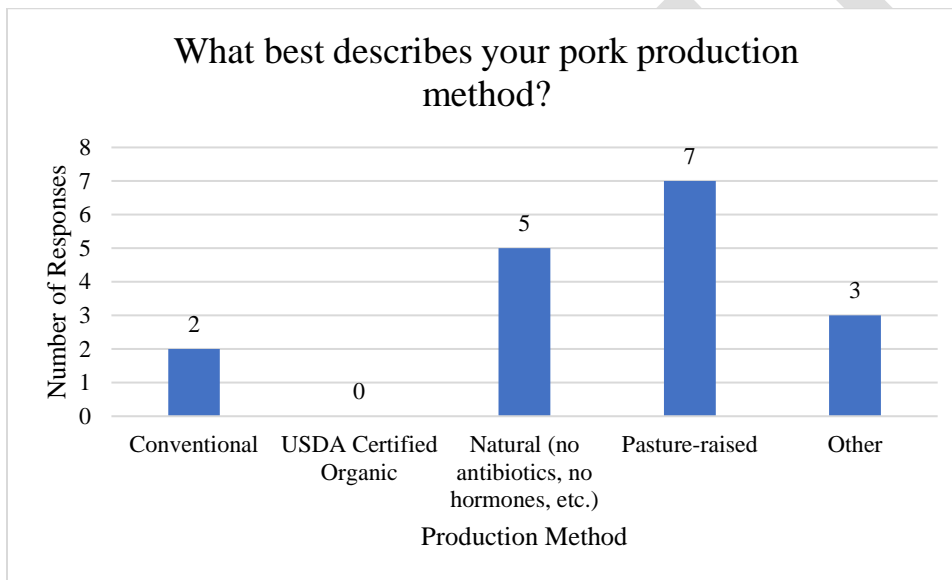
If a processing facility were to develop a USDA Certified Organic beef brand, would you be willing to raise your cattle as USDA Certified Organic and sell your meat (specific cuts or whole animals) to the facility?



## Hog Survey Results

Over the course of the survey, 13 individuals opened the survey link, with 8 individuals completing 100 percent of the survey. An additional respondent partially completed the survey with reportable responses. Many of the survey questions allowed for multiple responses, which is why some questions may appear to have more responses than number of total completed responses.

Respondents were asked to describe their operation type with response choices being conventional, USDA certified organic, natural (no antibiotics, no hormones, etc.), pasture-raised, and other. Seven respondents indicated their pork is pasture-raised, with an additional five indicating their pork is natural. “Other” responses included “humanely raised”, “supplemented with organic grain”, and “non-GMO”.



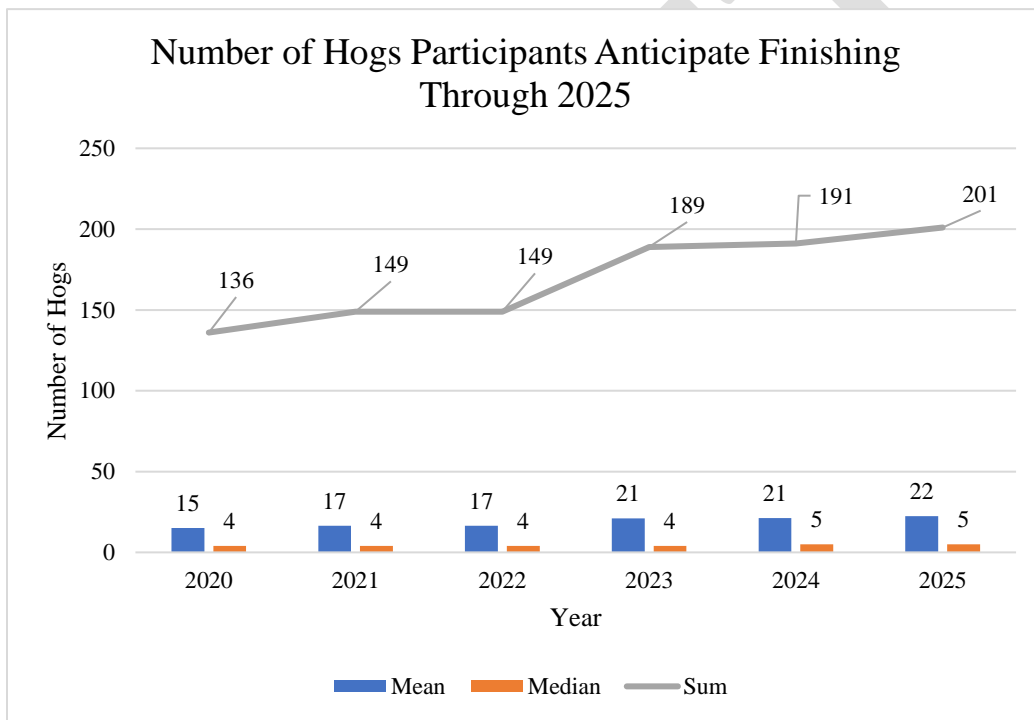
Size of operations varied as with the cattle operations. The mean and median number of hogs raised each year varied significantly, indicating that there are a larger number of smaller operations.

Average Number of Hogs Raised Each Year							
	Mean	Median	Mode	Min	25th Percentile	75th Percentile	Max
Hogs	17.2	5	5	2	3	26.5	80

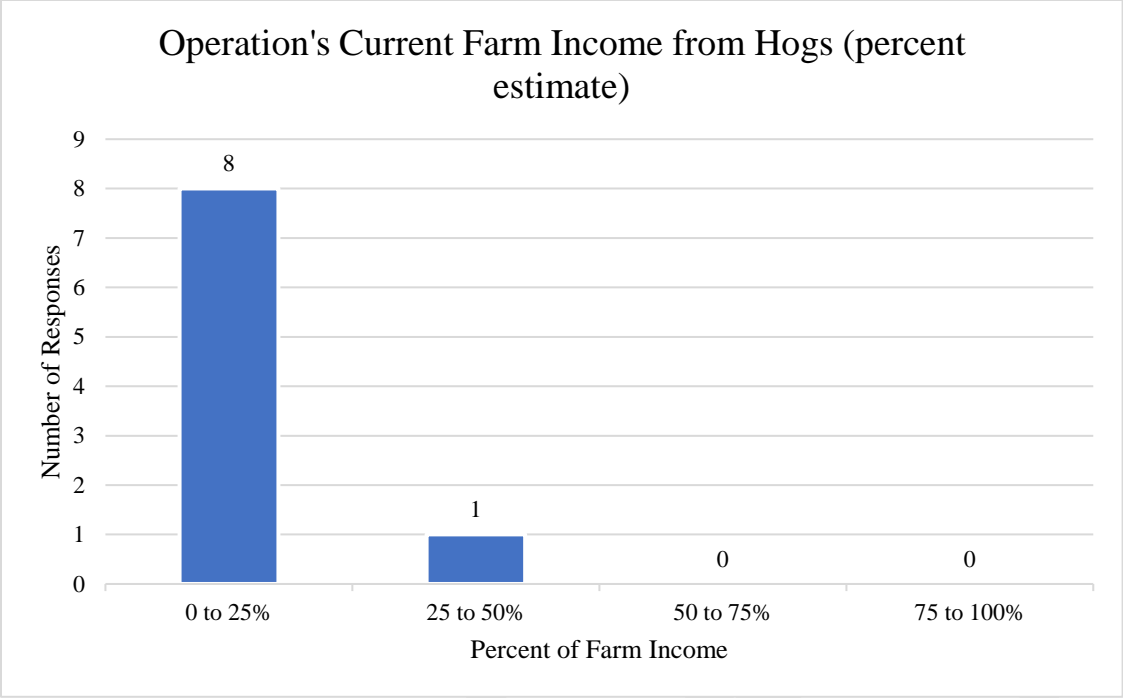
Average live weight as slaughter was more consistent across responses, with a mean of 249 pounds and a median of 250 pounds.

Average Live Weight in Pounds per Head at Slaughter							
	Mean	Median	Mode	Min	25th Percentile	75th Percentile	Max
Weight	249	250	300	20	223	300	380

To give a base for expected production through 2025, respondents were asked to indicate the total number of hogs they anticipate finishing for slaughter each year. Production is expected to increase, with the sum of all responses being 136 head in 2020, and 201 in 2025. The following chart displays the sum, mean, and median of responses.



Regarding farm income, all but one respondent indicated that zero to 25 percent of their farm income comes from hogs. This indicates that most individuals are making the majority of their income from other farming operations.



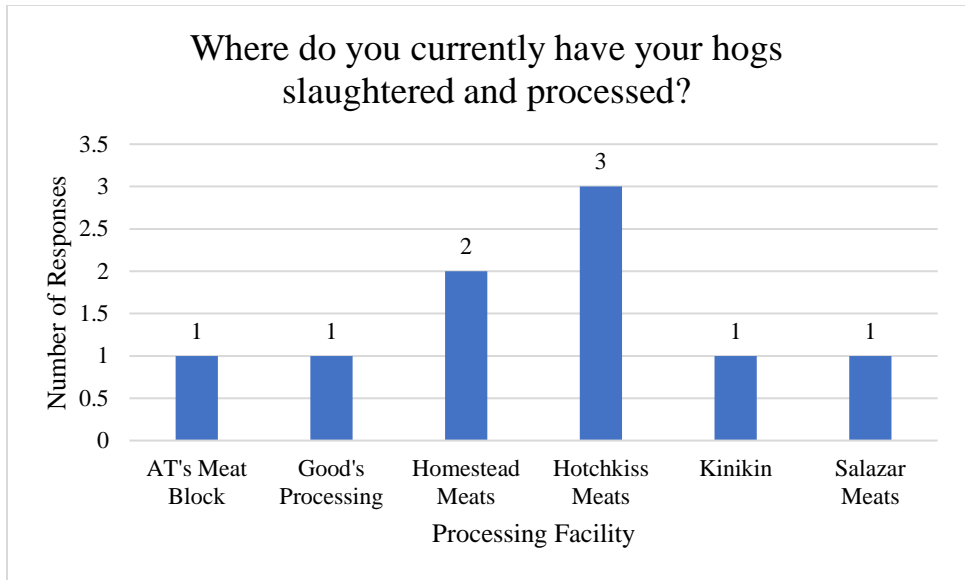
The farm size of the hog farmers seems to be considerably smaller than that of the beef farmers. The mean and median are also similar in value, which indicates a more consistent range in the data set.

Number of Acres in Farmland						
Mean	Median	Mode	Min	25th Percentile	75th Percentile	Max
77.7	80.0	120.0	0.4	36.5	120.0	160.0

Of total farm acreage, respondents indicate that approximately 60 percent of that acreage is in pasture.

Number of Acres in Pasture						
Mean	Median	Mode	Min	25th Percentile	75th Percentile	Max
55.8	50.0	50.0	0.3	8.5	82.5	160.0

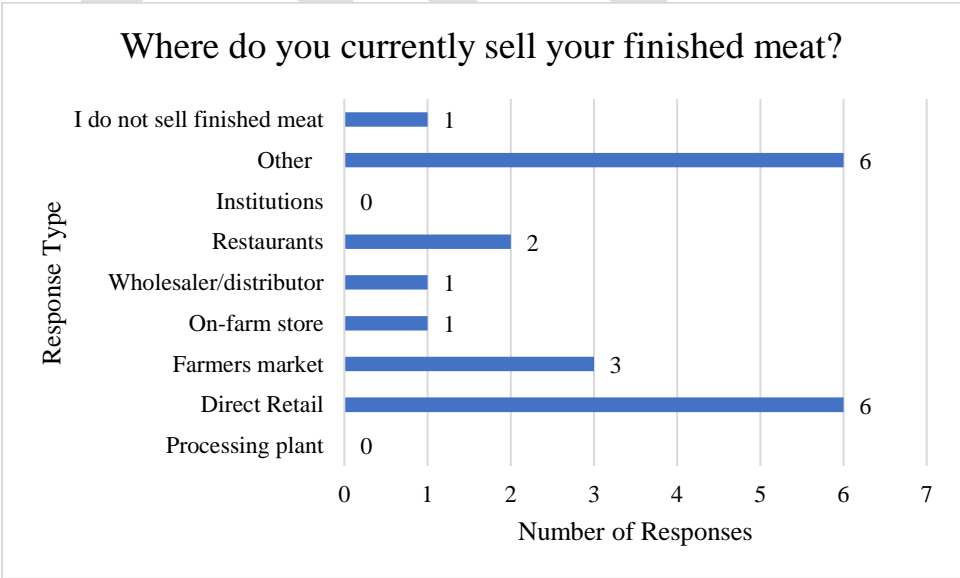
Regarding where hog farmers currently have their hogs slaughtered and processed, responses were fairly evenly distributed across facilities, with Hotchkiss Meats receiving three responses, and Homestead Meats receiving two.



Miles traveled to have their hogs slaughtered is similar to what was seen with the cattle. The data set had a mean of 80 miles, with the median being 90 miles.

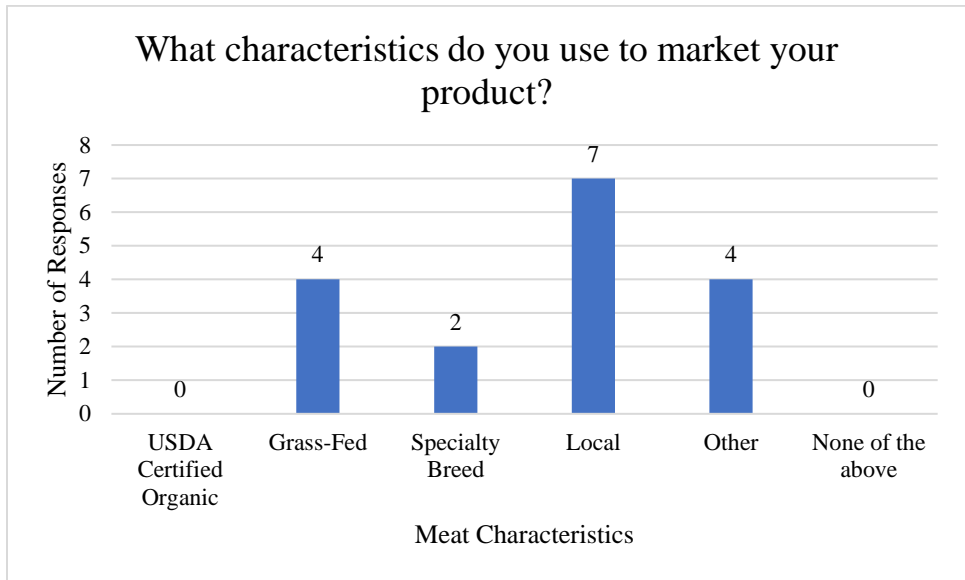
Please indicate the distance in one-way miles that you currently travel to take your hogs to slaughter.						
Mean	Median	Mode	Min	25th Percentile	75th Percentile	Max
80	90	65	3	65	103	120

Most of the surveyed hog farmers either sell their finished meat through direct retail, or other unique methods of sale. Responses in the “other” category included “friends/family”, “family and friends”, “direct custom customers”, “CSA program and fresh food hub”, “Alamosa food bank”.



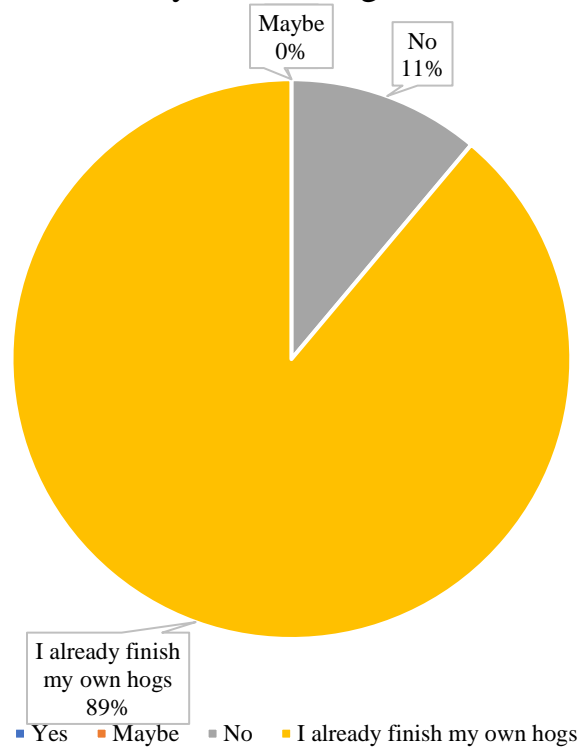


Regarding how these farmers market their meat, the most popular response option was local (seven responses), with grass-fed and other both receiving four responses. “Other” responses included “humanely raised”, “organic”, “non-GMO feed”, and “marbleized, non-GMO”.



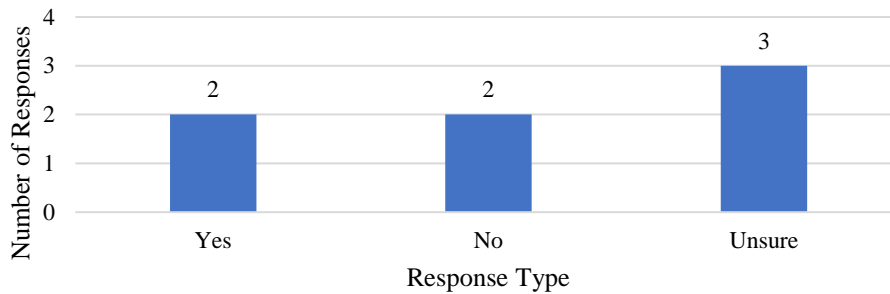
Regarding the expansion of a current meat processing facility, all but one respondent indicated that they already finish their own hogs, so the expansion of a current meat processing facility would not have an impact on their decision-making regarding finishing hogs for slaughter. The remaining respondent indicated that no, a potential expansion would not influence their decision.

If you do not currently finish hogs, would the expansion of a current meat processing facility in region influence your decision to begin finishing your own hogs?



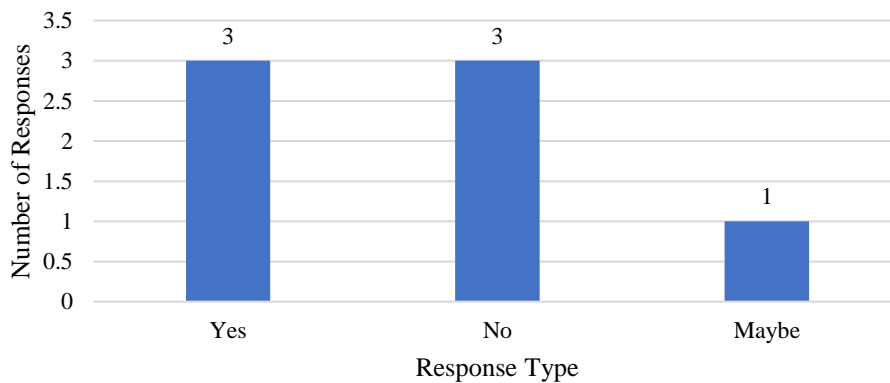
When asked whether they believe that a new facility would still be needed if a current slaughter facility was expanded, responses were almost perfectly evenly distributed amongst response categories. Two respondents indicated that yes, a new facility would still be needed, two respondents said no, and three indicated they were unsure.

Do you believe that if current processors in the region and surrounding area were to increase their processing capacity, scheduling options, and storage options, that there would be a need to construct a new processing facility in the region?



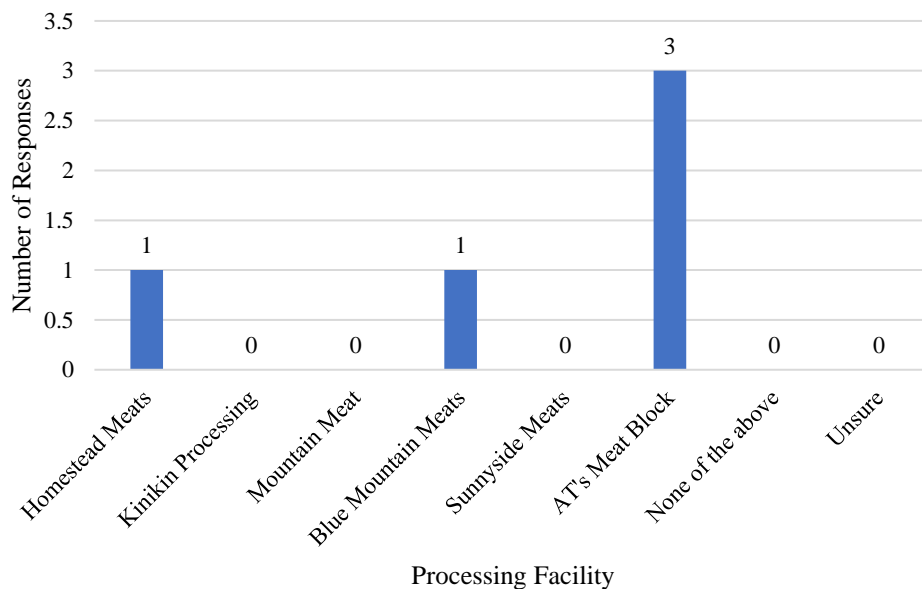
When asked whether AT's Meat Block would need to be USDA certified for respondents to send their hogs there for processing, responses were split, with three respondents indicated that it would need to be certified, and three indicating that it would not need to be certified.

Would AT's Meat Block need to become USDA certified before you would send your hogs there for processing?



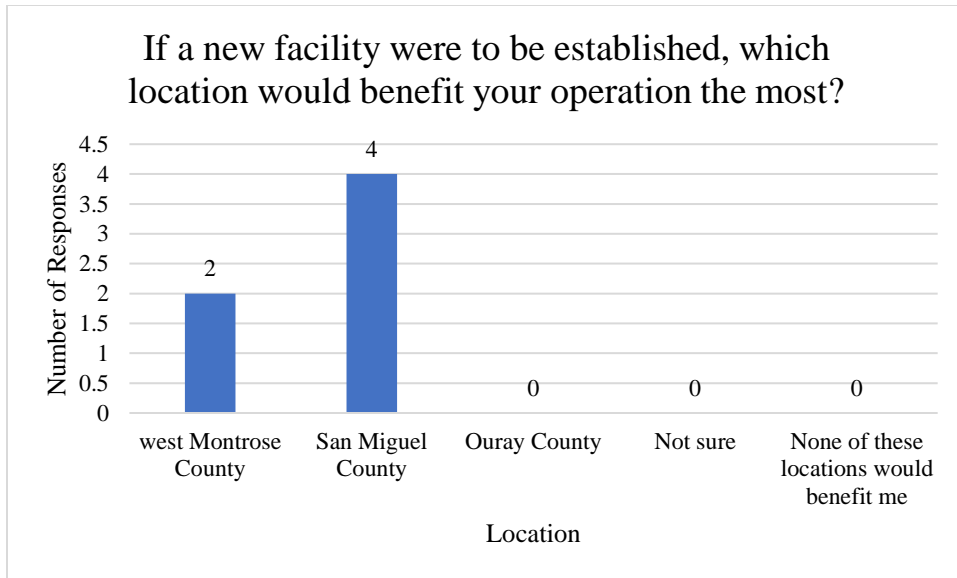
Next, hog producers were asked which of a list of local processors would most benefit their operation if it were to expand its processing capacity. Three respondents selected AT's Meat Block, and Homestead Meats and Blue Mountain Meats each received one response.

Of the processing facilities described in the previous question, which location(s) would most benefit your farming operation if it were to expand its processing capacity and increase available storage? It is assumed that capacity expansion would decrease

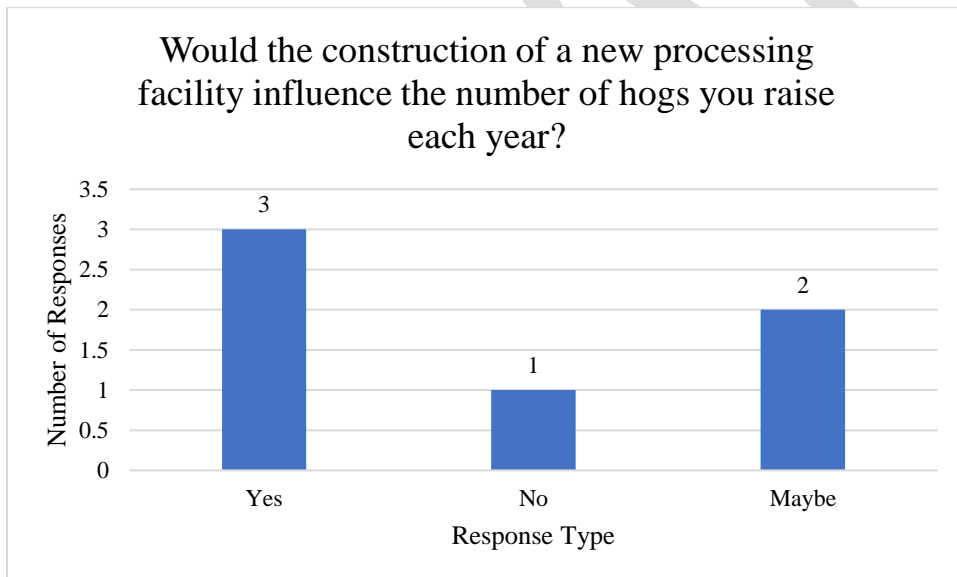


Respondents were then asked whether the expansion of one of the previously mentioned processing facilities would influence the number of hogs they anticipate finishing each year. Two respondents indicated it would influence their decision, while five indicated it would not. Of the two that indicated it would influence their decision, one individual indicated they would increase their herd size by 50 percent, while the other respondent indicated they would increase their herd size by 200 percent.

Moving to the construction of a new facility, respondents were asked whether they would be interested in sending their hogs to a new USDA inspected facility. Four respondents said yes, while two each said no and maybe. Similar to with the cattle responses, hog farmers indicated that a new facility in either San Miguel County or west Montrose County would be most beneficial to their operation.

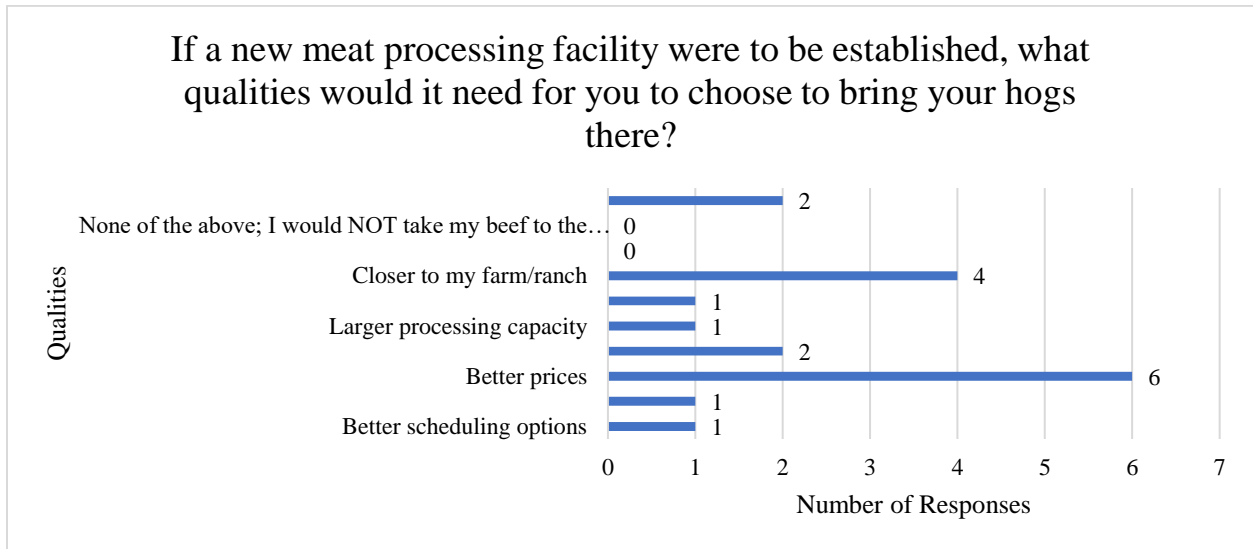


Responses varied from the original question when respondents were asked whether the construction of a new facility would influence the number of hogs they raise for finishing each year. Three indicated it would influence their decision, with an additional two indicating it may influence their decision.

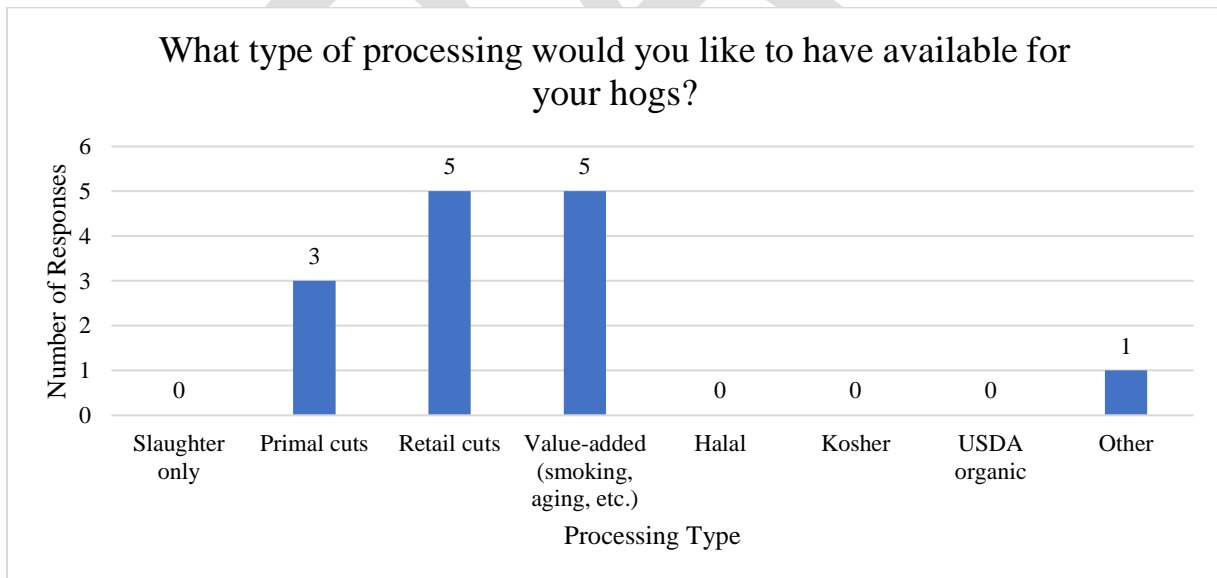


Regarding the anticipated increase in number of hogs raised, values for percent increase in herd size given were 50 percent, 7.5 percent, 200 percent, and 25 percent. This indicates that hog farmers may be more willing to increase their herd size for a new facility as opposed to an updated current facility.

In order for hog farmers to send their hogs to a new facility, farmers were most interested in the facility having better prices and being closer to their farm. “Other” responses included “custom butchery” and “no nitrates”.

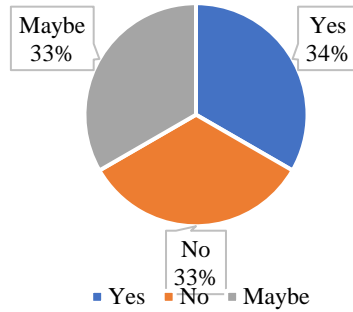


The most popular types of processing that hog farmers would like to be available at a new facility were retail cuts and value added (smoking, aging, etc.), with each receiving five responses.



Responses were evenly distributed when it comes to whether farmers would be willing to pay a price premium to send their hogs to a new facility with increased capacity.

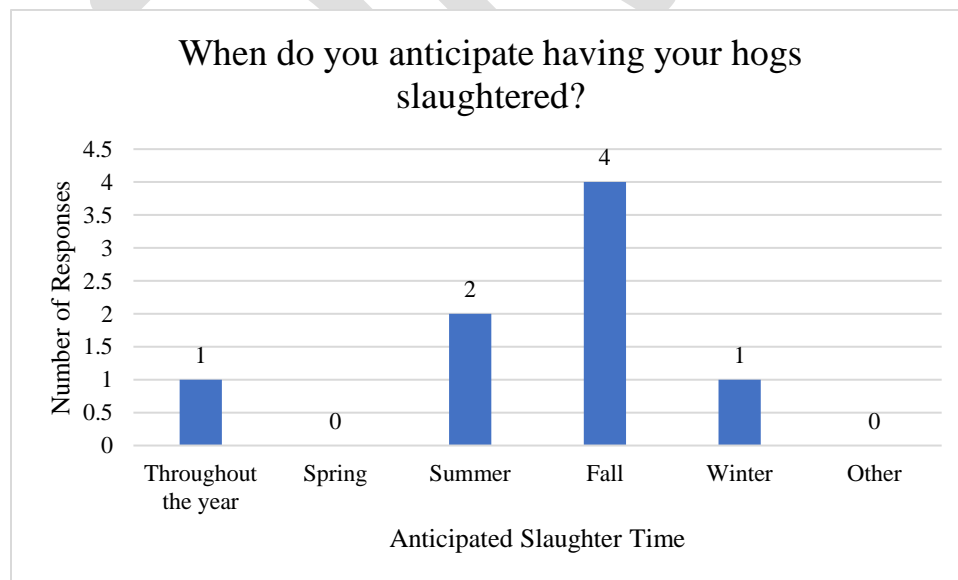
Would you be willing to pay a price premium to have your hogs slaughtered/processed at a new facility with increased slaughter capacity and storage?



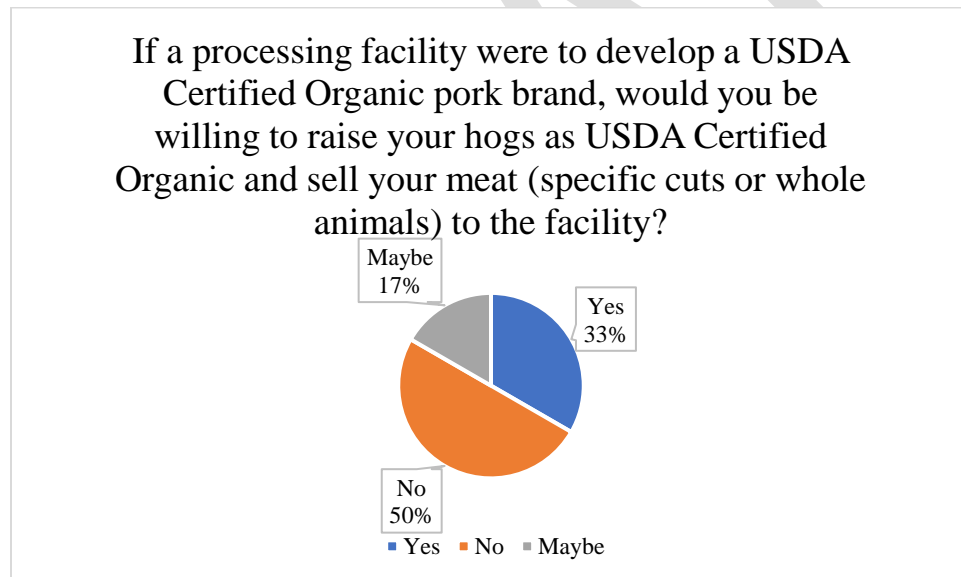
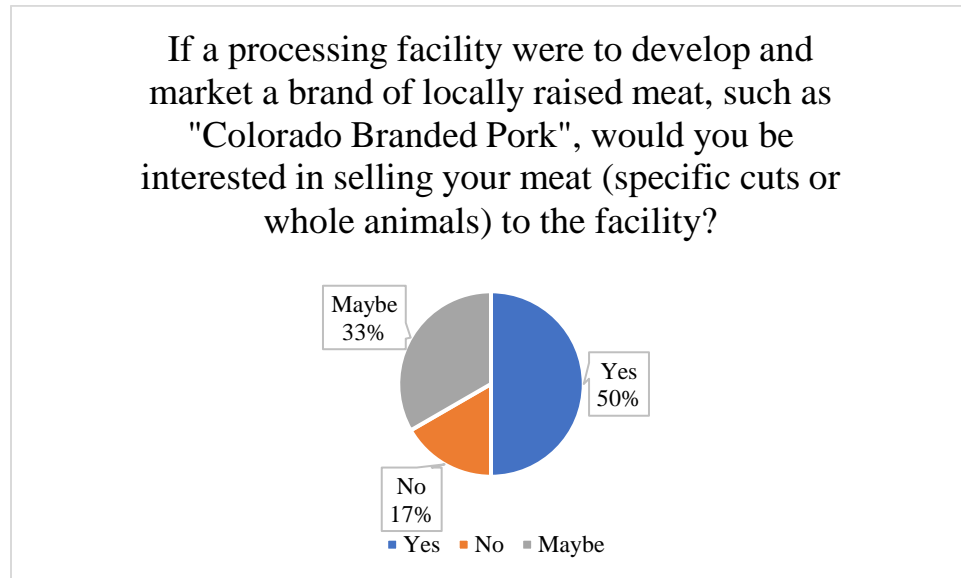
However, the distance farmers are willing to travel to send their hogs to slaughter does not vary much from the distance they currently travel. The dataset had a mean of 89.2 and a median of 92.5, indicating fairly consistent responses.

What is the maximum distance (one-way) you are willing to travel to have your hogs processed?						
Mean	Median	Mode	Min	25th Percentile	75th Percentile	Max
89.2	92.5	N/A	50.0	72.5	105.0	120.0

The slaughter time period for hog farmers seems to be more condensed amongst respondents than that of the beef farmers. Four respondents indicated they anticipate slaughtering in the fall, while two indicate they anticipate slaughtering in the summer.



Finally, respondents were asked whether they would be interested in selling their meat to the facility if the facility developed a “Colorado Branded Pork” brand or a USDA Certified Organic pork brand. Respondents seem to be more interested in the “Colorado Branded Pork” brand.

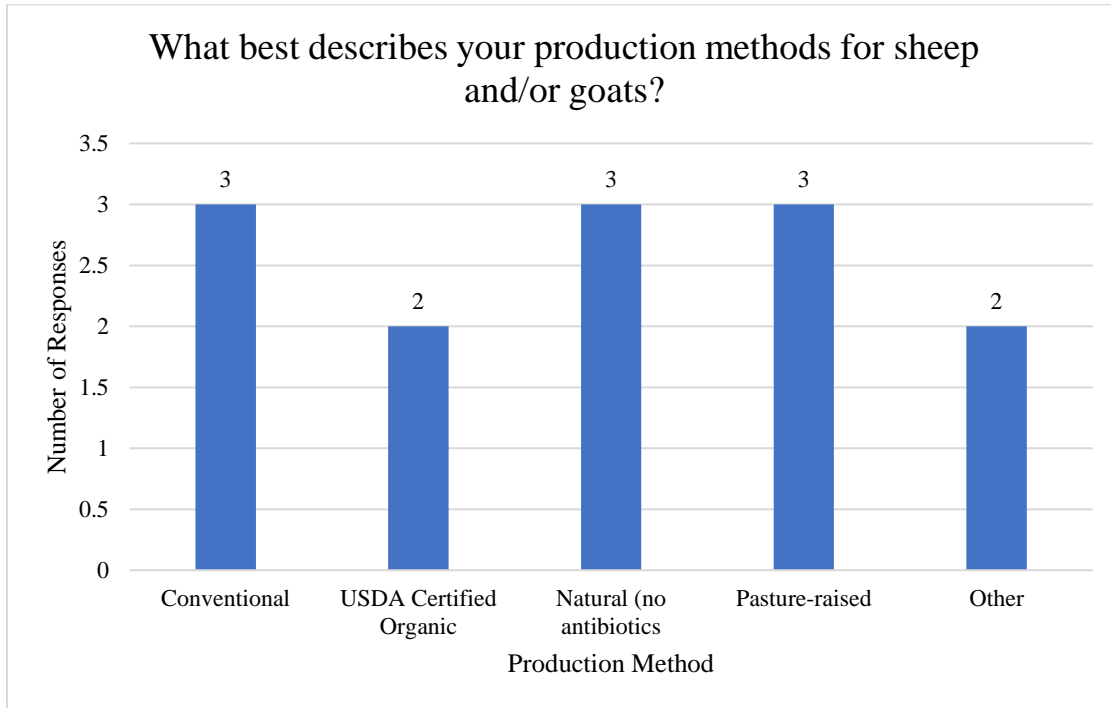


### Sheep and Goat Survey Results

Over the course of the survey, 11 individuals opened the survey link, with three individuals completing 100 percent of the survey. Many of the survey questions allowed for multiple responses, which is why some questions may appear to have more responses than number of total completed responses. Due to the low number of responses for this survey, results of all survey questions will be discussed in a more concise manner.



Of the three respondents, two raise only sheep, while one individual raises both sheep and goats. However, these three individuals seem to use many different production methods for their animals, with responses being fairly evenly split between the available response options. “Other” responses included “no hormones” and “natural could be achieved with additional record keeping”.



Of the four operations (counting the sheep and goat operations separately for the individual who raises both), herds of sheep are five, 20, and 80 head, and the goat herd is five head. Regarding live weight at slaughter, the three sheep responses resulted in live weights of 110, 125, and 150 pounds, with the goats also being 150 pounds.

When asked whether the expansion of a current processing facility would increase the number sheep or goats respondents anticipate finishing, the sum of sheep producers anticipate finishing did increase each of the six estimated years from 65 in 2020 to 140 in 2025, a 115 percent increase. The goat producer indicated that an increase in production would not be carried out until 2024.

Regarding farm income, two respondents indicated that zero to 25 percent of their farm income comes from sheep or goats, while one respondent indicated that sheep and/or goat production makes up 25 to 50 percent of their farm income. The sizes of the farm regarding acreage were varied, with responses including 160, 280, and 8,500 acres. Of the two smaller farms, 50 and 110 acres respectively are in pasture, while the entire 8,500 acre farm is in pasture.

Moving to current slaughter practices, one individual has their meat process at AT's Meats, and two individuals have their meat processed at Blue Mountain Meats. Mileage traveled to slaughter does not vary significantly from the previous surveys, with responses including 30, 100, and 96 miles. This gives an average one-way distance of 75.3 miles.

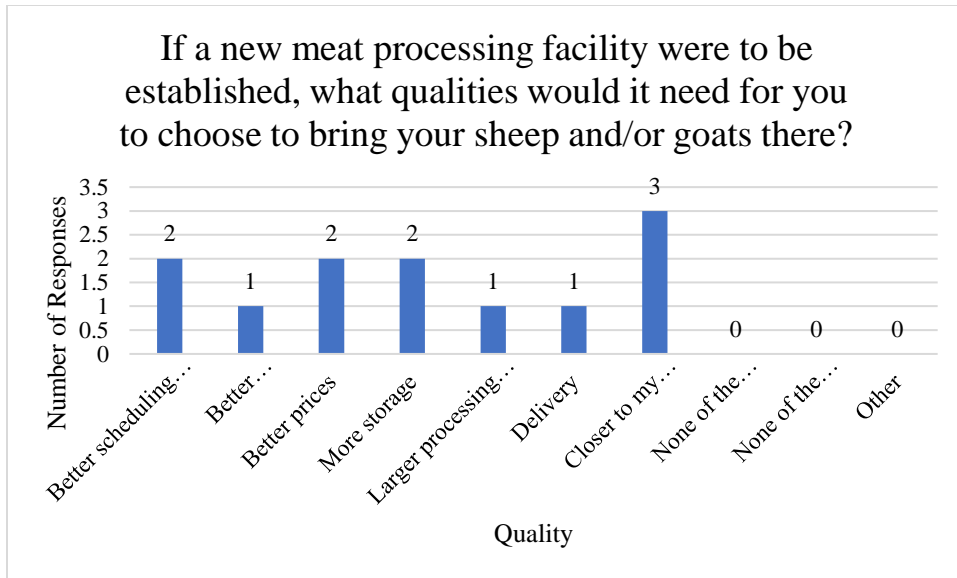
When asked where they sell their finished meat, the first respondent indicated they sell at a farmers market and an on-fam store, the second sells direct retail, and the third sell to restaurants as well as the fresh food hub and private parties. To market their product, each producer markets it as local, with one marketing it at USDA Certified Organic, and another marketing it as Colorado Lamb.

Two respondents indicated they were unsure whether increasing the processing capacity of a current processing facility would mitigate the need to construct a new facility, while one individual indicated that a new facility would still need to be constructed even if a current facility increased their capacity. Specifically for AT's Meat Block, one response each of yes, no, and maybe was received when asked whether it would need to be USDA certified for the producer to be willing to send their meat there.

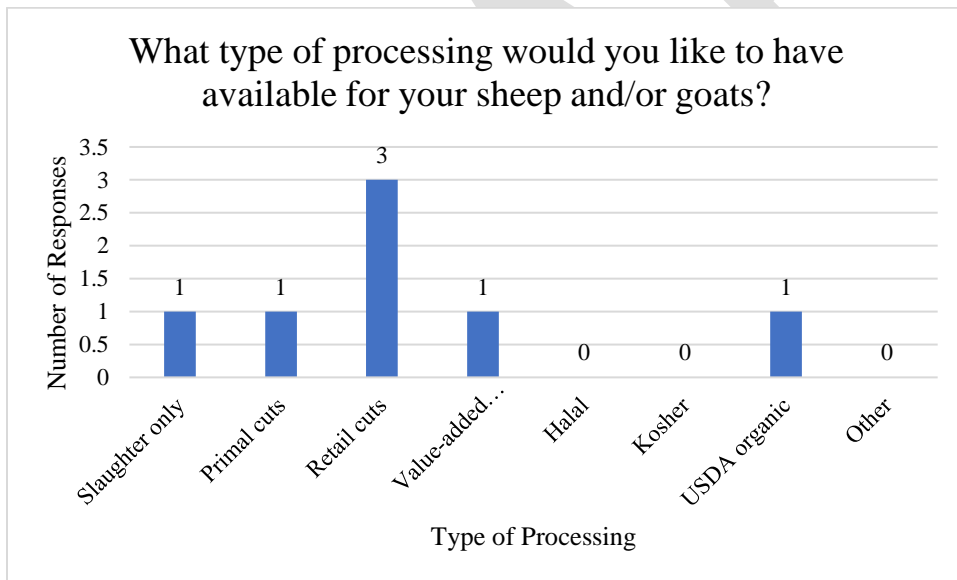
Of the local processing facilities provided to the respondents, results were mixed regarding which location would benefit them the most if it expanded. Homestead Meats received two responses, Kinikin received three, AT's Meat Block received two, and Mountain Meats received one. Respondents were allowed to select more than one response for this question. However, when asked whether the expansion of one of these facilities would increase the number of sheep or goats they raise for slaughter, one response each was received for yes, no, and maybe. Of the two respondents that said yes and maybe, they also indicated that they would increase their herd sizes by 20 and 25 percent if one of the current facilities were to be expanded.

When asked whether respondents would be willing to send their sheep or goats to a new USDA inspected facility, one response of yes was received, and two responses of maybe were received. Of potential locations, two respondents indicated that west Montrose County would be most beneficial, while one respondent indicated San Miguel County would be most beneficial. Responses were exactly the same when asked whether the construction of a new facility would influence the number of sheep or goats raised each year, with one response each for yes, no, and maybe. Additionally, the percent anticipated increase in herd size was again 20 and 25 percent.

Regarding the qualities that respondents would like a new facility to have in order for them to bring their sheep or goats there, respondents each seemed to select several categories that were important to them, with being closer to their farm or ranch receiving a tally from each respondent.



Regarding the types of processing individuals would like available at a new facility, retail cuts were the most popular feature, with one tally being recorded for several other services.



However, only one respondent indicated that would be willing to pay a price premium to send their livestock to the new facility, while the other two indicated they would not. Distance respondents are willing to travel to have their meat processed did not vary significantly from what they are already traveling, with one response of 30 miles, and two of 100 miles. This is an average of 76.7 one-way miles. For slaughter time, one individual indicated they slaughter in the spring and fall, while two individuals indicated they slaughter throughout the year.

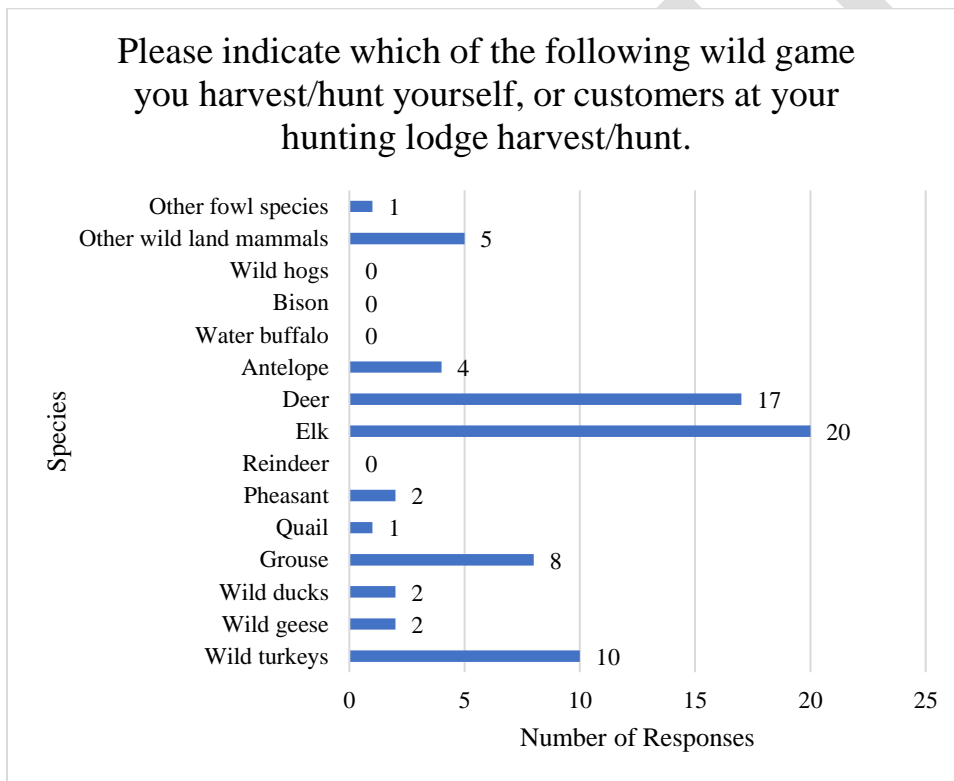
Regarding the potential of the facility developing “Colorado Branded Mutton/Chevon”, one respondent indicated they would be willing to sell their meat to the facility as part of the brand

effort, while the other two indicated they may be willing to participate. For a potential USDA organic branded mutton or chevon, one response of each was recorded for yes, no, and maybe.

### Wild Game Survey Results

Over the course of the survey, 37 individuals opened the survey link, with 18 individuals completing 100 percent of the survey. An additional three respondents partially completed the survey with reportable responses. Many of the survey questions allowed for multiple responses, which is why some questions may appear to have more responses than number of total completed responses.

The most popular wild game being hunted by survey respondents are deer and elk, with several individuals also hunting wild turkey and grouse.



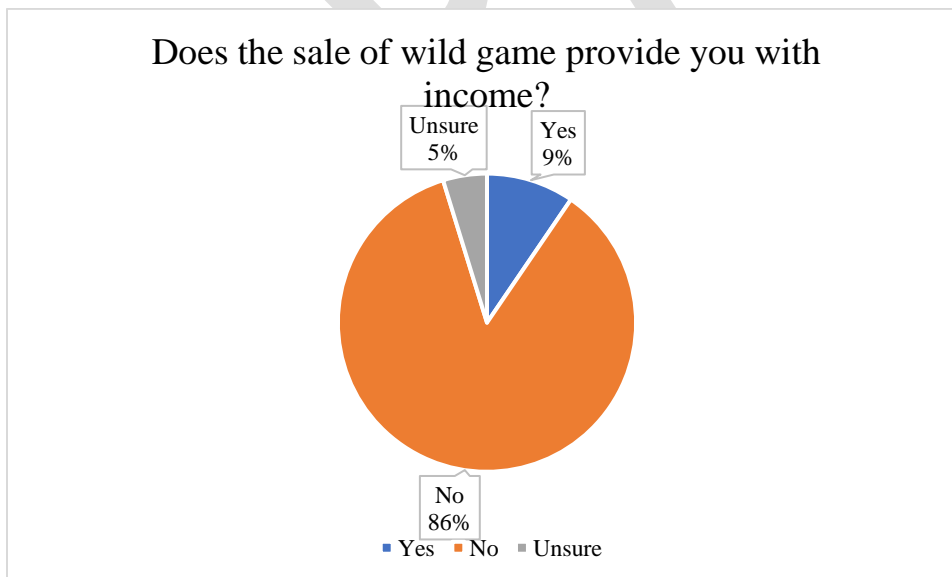
Further, the average number of animals hunted/harvest in a given year are presented in the following table. As is expected, elk, deer, and grouse had some of the largest totals.

On average, how many wild game animals do you harvest/hunt each year? Include animals that you personally harvest/hunt and animals that your customers harvest/hunt.						
	Mean	Median	Mode	Min	Max	Sum
Wild turkeys	1.5	1.0	1.0	1.0	4.0	18.0
Wild geese	6.5	6.5	N/A	3.0	10.0	13.0

Wild ducks	9.7	6.0	N/A	3.0	20.0	29.0
Grouse	6.6	4.0	4.0	2.0	20.0	46.0
Quail	15.0	15.0	N/A	15.0	15.0	15.0
Pheasant	15.0	15.0	N/A	10.0	20.0	30.0
Reindeer	0.0	0.0	0.0	0.0	0.0	0.0
Elk	3.5	1.0	1.0	0.5	30.0	74.5
Deer	3.0	1.0	1.0	0.5	20.0	45.5
Antelope	1.3	1.3	N/A	0.5	2.0	2.5
Water buffalo	0.0	0.0	0.0	0.0	0.0	0.0
Bison	0.0	0.0	0.0	0.0	0.0	0.0
Wild hogs	0.0	0.0	0.0	0.0	0.0	0.0
Other wild land mammals	7.0	7.0	N/A	4.0	10.0	14.0
Other fowl species	20.0	20.0	N/A	20.0	20.0	20.0
*Values of zero not included in data analysis if other numerical values were given by other respondents.						

Respondents were asked what percent of the wild game they hunt/harvest is processed locally. The median of the data set was 90, indicating that most individuals are having a majority of their wild game processed locally.

Next, respondents were asked whether the sale of wild game provided them with income. It should be noted that while the sale of wild game is illegal, it is possible that those who sell livestock such as farm-raised elk are also classifying these animals as wild game. As such, two individuals indicated they receive income from the sale of wild game.



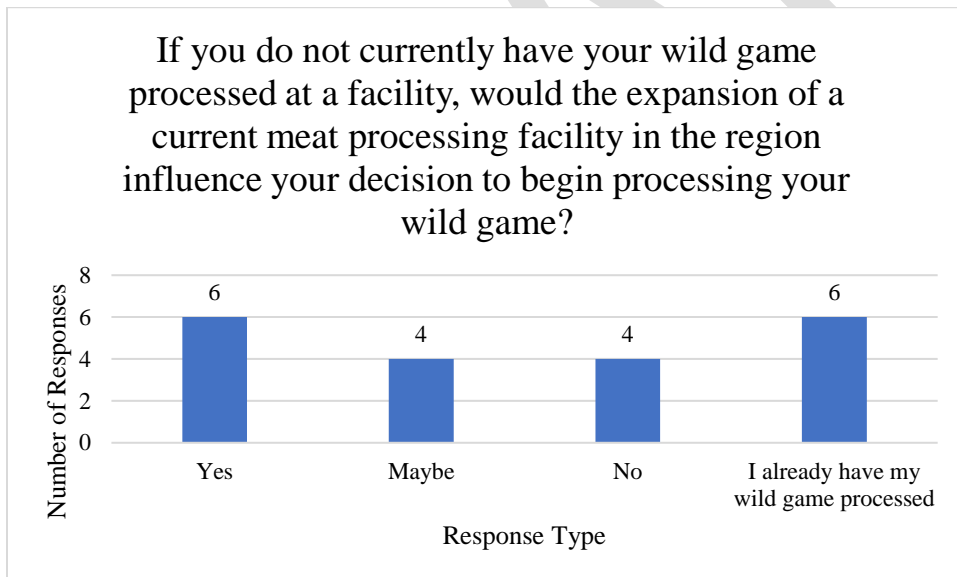
Relative to the previous question, respondents were asked how much of their income comes from the sale of wild game. Only three respondents indicated that any of their income comes from the

sale of wild game with two respondents selected the zero to 25 percent range and one individual indicating that they receive 75 to 100 percent of their total income from the sale of wild game.

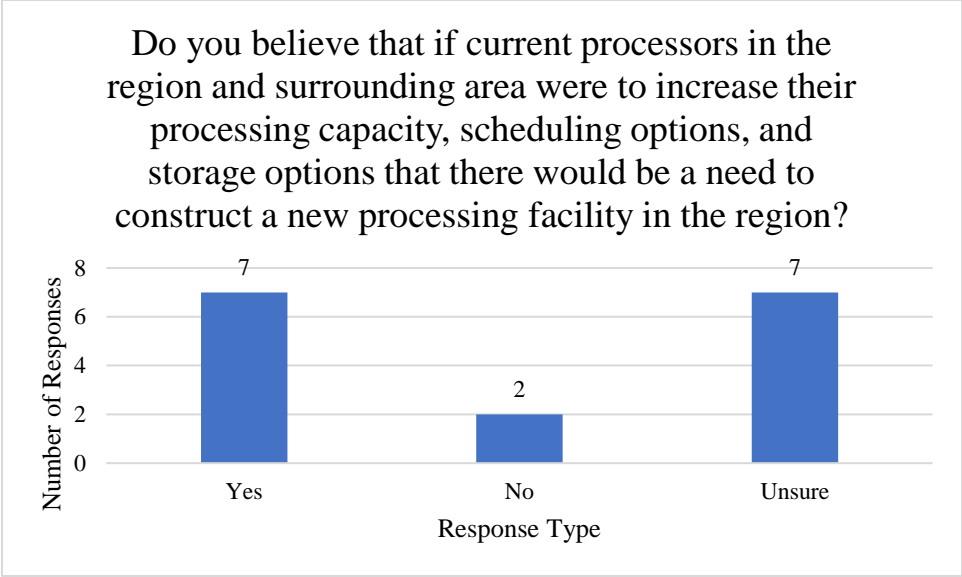
Differing from the previous surveys, only about half of respondents have their wild game processed at a processing facility, indicating that many individuals process their own wild game. Ten respondents indicated they have wild game processed at a facility, while 11 indicated they do not. Of those that provided information regarding where they have their wild game processed, four individuals use AT's Meat Block, four use Kinikin, and one uses Good's Processing. The average distance traveled by these individuals to have their game process is also less than that of the livestock producers. The data set had a median of 50 one-way miles traveled.

Moving on to where respondents currently sell their finished meat, 19 of the 20 respondents now indicated that they do not sell finished meat, while one respondent indicated they sell halves and wholes directly to customers. That one individual also indicated that they market their product as a specialty breed.

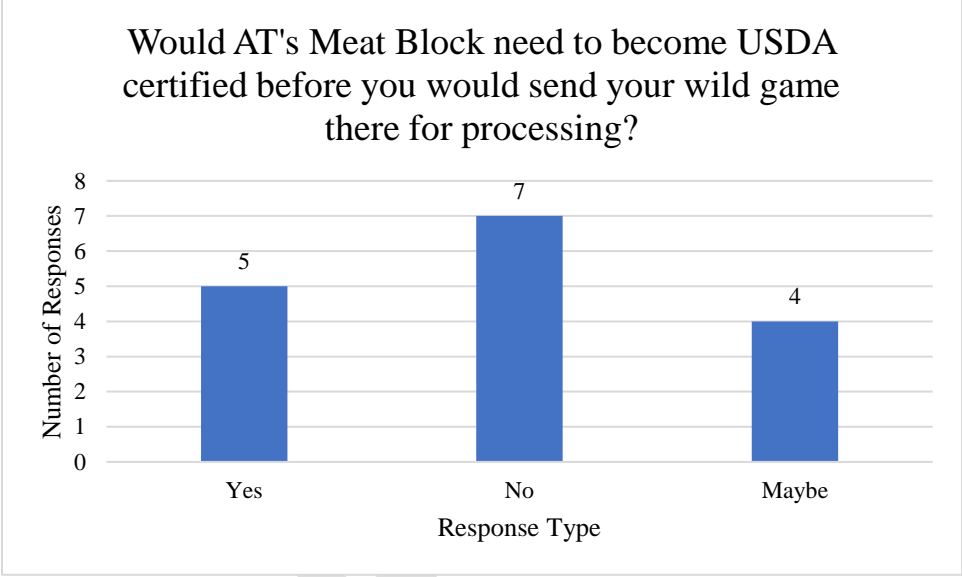
When asked whether the expansion of a current facility would influence their decision to begin processing their wild game, six respondents indicated that it would influence their decision, while an additional four respondents indicated that it may influence their decision.



However, respondents seem to also indicate that even if a current facility were to be expanded, there would still be a need to construct a new facility in the region.

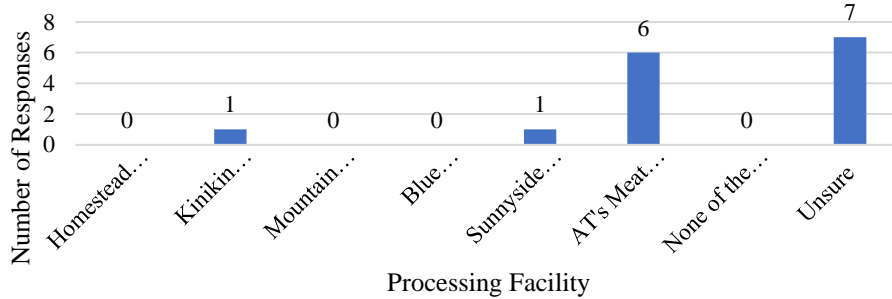


Regarding AT's Meat Block specifically, five respondents indicated that the facility would need to become USDA certified before they would send their wild game there for processing.



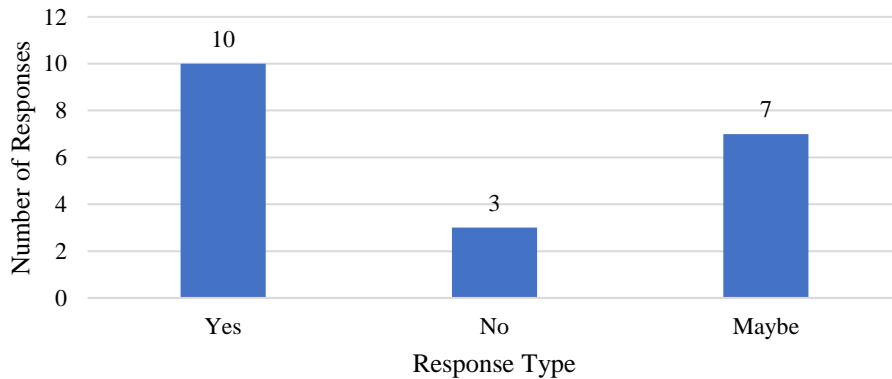
Dissimilar to the previous surveys, six respondents indicated that if AT's Meat Block were to be renovated that it would be the location that would benefit their operation the most, while seven indicated they were unsure which location would benefit their operation the most.

Of the processing facilities described in the previous question which location(s) would most benefit your operation if it were to expand its processing capacity and increase available storage?



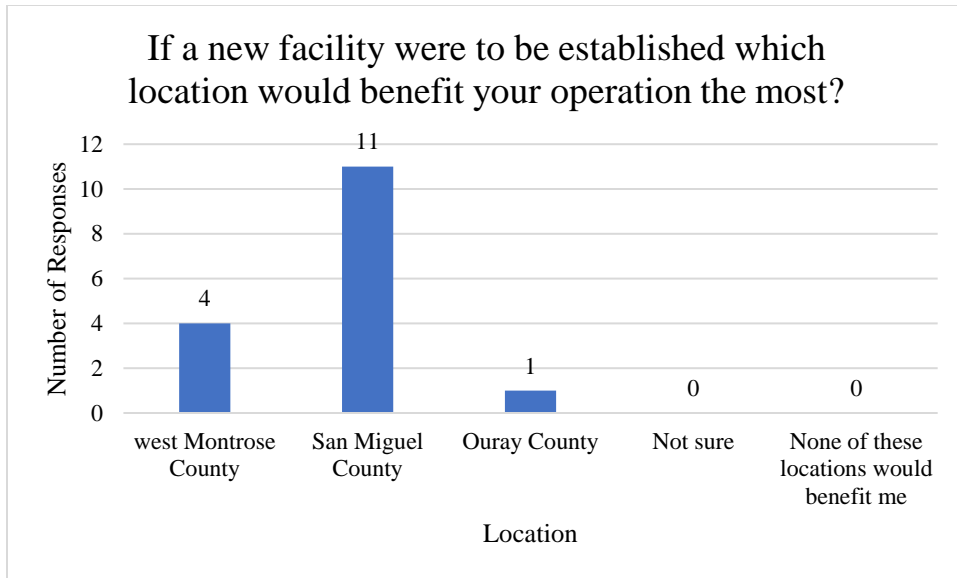
Ten of the 20 respondents indicated they would be interested in sending their wild game to a new USDA inspected slaughter facility, while an additional seven indicated they may be interested.

Would you be interested in sending wild game to a new USDA inspected slaughter/processing facility located in the region?

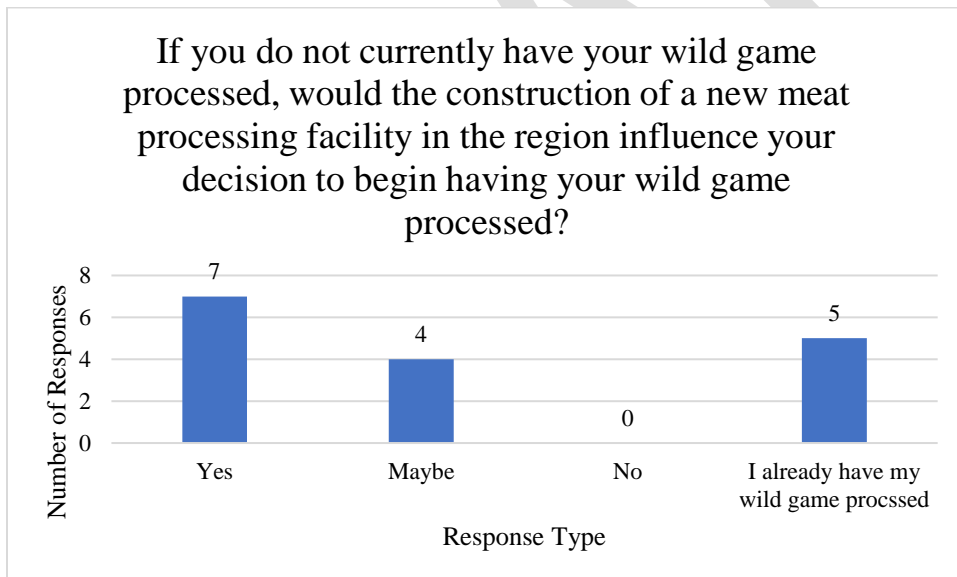


Of the potential locations given to respondents, 11 indicated that a new facility in San Miguel County would be most beneficial, with four indicating west Montrose County would be most beneficial. This is on trend with the previous surveys.



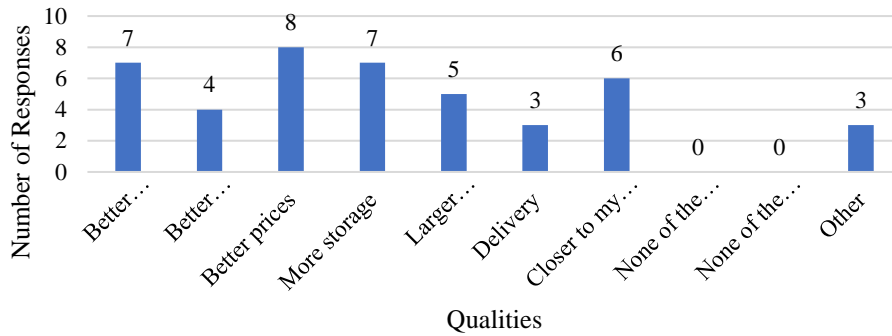


Moving on to the construction of a new facility, seven respondents indicated that the construction of a new facility would influence their decision to begin having their wild game processed.



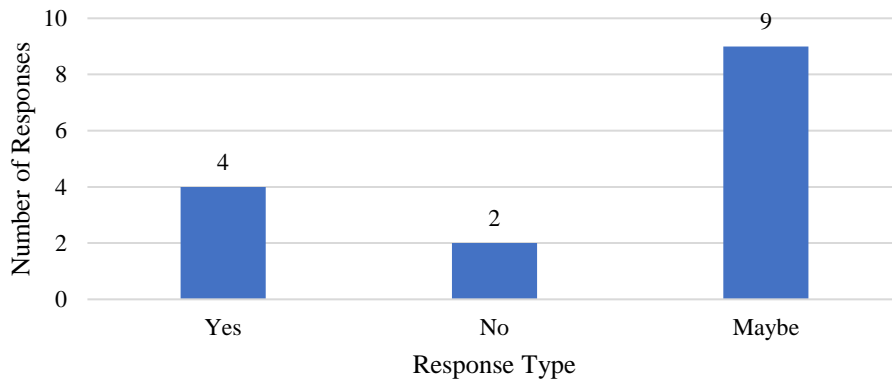
In order for respondents to use the new facility, there were several factors that respondents found to be important. Some of the most popular qualities were better scheduling, better prices, and more storage.

If a new meat processing facility were to be established in the region, what qualities would it need for you to choose to bring your wild game there?



When asked whether they would be willing to pay a price premium to have their wild game processed at a new facility with increased capacity, four respondents indicated that they would be willing to pay a price premium, while an additional nine indicated they may be willing to pay a price premium.

Would you be willing to pay a price premium to have your wild game processed at a new facility with increased slaughter capacity and storage?



Interestingly, when asked about the maximum distance respondents would be willing to travel to have their wild game processed, the data set had the same median value of 50 one-way miles as the question where respondents were asked how many miles they currently travel to have their wild game processed.

## **Summary of Producer Survey Results**

The survey with the most respondents and also the most animals being collectively produced by respondents was the beef survey. Production methods were relatively mixed amongst respondents across conventional, natural, pasture-raised, and grass-fed. The average number of cattle being finished for slaughter each year was 6.1 across 41 respondents. However, the sum of the number of cattle respondents anticipate finishing between years 2020 and 2025 was 293 and 435, respectively, indicating that respondents anticipate finishing more cattle in the future. If a current meat processing facility were to be expanded, respondents indicated they would finish 387 cattle in 2020, which would increase to 557 cattle by 2025. If a new processing facility was established, respondents indicated they would finish 336 cattle in 2020, which would increase to 539 in 2025. Responses to these questions indicate that farmers may be willing to finish more cattle if a current facility was expanded or a new one was established. Regarding location preferences for a new facility, respondents preferred a location either in west Montrose county or San Miguel county. Of the services and/or perks that may be offered at a new facility, respondents indicated they would prefer a facility that is closer to their farm or ranch, has better prices, better scheduling options, and more storage.