



New England Beef-to-Institution Marketing Study

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Executive Summary

The goal of this study is to assess the institutional demand for regionally grown ground beef; analyze the logistics and infrastructure required to support such demand; and if feasible, propose a model that could be replicated amongst the New England states to source, process, market and distribute regionally grown ground beef to institutions.

The study concluded that:

- There are opportunities for growth in the use of local beef in institutional markets in all six New England States
- The bulk of the need (86%) is for raw, bulk ground beef, with no additional processing (pasteurizing, cooking, spicing, shaping, or scoring) required
- Two models are currently in use that could be replicated on a regional basis to service this demand.

Conclusions

Buyers and price sensitivity

Within this market segment we discovered two distinct audiences:

- 1) Buyers who have more autonomy and decision-making control, whose primary decision making factors are the animal management practices used to produce the beef they are buying and a desire to support the local economy. These are buyers who are willing to make the effort to seek out local beef if it is available. These buyers are largely hospitals, higher education institutions, and private establishments.

29% of the respondents said they would prefer to buy their locally sourced product direct from a producer.

These buyers have a maximum price threshold of \$4-5/lb for locally sourced ground beef.

- 2) Buyers who are price sensitive and driven by routine. Buyers whose primary purchasing decision making factors are price and the degree to which the product is incorporated into their existing order and purchasing mechanisms. These buyers are largely K-12 schools, higher education, and food service management companies, and the distributors that service them.

53% of the respondents said they would prefer to buy their locally sourced product from their distributor.

These buyers price sensitivity hovers around \$2-3/lb.

Market Size, Scope - Buyer Responses Extrapolated to Total Institutional Population

Survey respondents represent 8% of the total institutional population in New England. Survey respondents utilize a total of 495,264 pounds of ground beef annually. Of this, respondents noted that they would purchase up to 25% of their total volume needs from a local source if the source could hit a \$2-3 per pound price point. According to respondents, 86% of their demand is for un-pasteurized, un-cooked, bulk, ground beef.

If one extrapolates this to the total institutional population base, 495,264 pounds equals 8% of 6,190,800 pounds. Therefore total annual New England institutional demand for ground beef approximates 6,190,800 pounds. 86% of the total institutional demand, 5,324,088 pounds is for bulk, ground beef. 25% of 6,190,800 pounds equals 1,547,700 pounds.

This means at \$2-3 per pound, the initial size and scope for a local beef to New England institutional market equals 1,547,700 pounds per year of which 1,331,022 pounds is raw, bulk ground beef.

If one assumes the average 3-5 body condition dairy or non-freezer trade grade beef represents 384 pounds of ground beef,¹ then this market has the potential to divert up to 4,030 regional culls into the New England institutional food supply on an annual basis.

The table on the next page lists each state's price sensitivity threshold and the institutional market segments that support that price point. This table can help processors and producers evaluate potential geographic regions, types of institutions, and products to serve and conduct financial analysis to evaluate the feasibility for their enterprise.

¹ see Processor Analysis: Carcass Yields.

Price Sensitivity Threshold by State, Institution, and Product

	CT	MA	ME	NH	RI	VT	Average All States
Bulk	\$2.64	\$2.46	\$2.88	\$2.43	N/A	\$3.05	\$2.69
	C H S	C H S	C H S	C H S	N/A	H	
Patty (4 ounce)	\$3.04	\$2.55	\$2.00	\$2.78	N/A	\$3.08	\$2.69
	C H	C H	C H S	C H	N/A	C H	
Meatballs	\$1.88	\$2.14	\$1.83	\$2.53	N/A	\$2.83	\$2.24
	C S	C S	C S	C S	N/A	C S	
Frozen uncooked	\$2.55	\$1.88	N/A	\$2.13	N/A	\$2.95	\$2.38
	H	H S	N/A	H S	N/A	H	

C=College/University H=Hospital S=Schools K-12

Models

In our research we found examples of both price sensitive audience’s and source sensitive audience’s ground beef needs being met by a local product. Two models stood out as being replicable on a regional scale, a producer-driven model that is designed for the buyer with decision making control and a proactive desire to source local beef, and a processor-driven model designed to service the institutionalized process and price driven buyers. The models create opportunities for both beef producers and dairy farmers, as well processors in all six New England states.

The producer-driven model

- 1) is limited in its ability to create widespread regional impact on the amount of local beef sold to institution markets
- 2) is best suited for small scale volume producers:
 - who want to be involved in the sales transaction
 - for beef and dairy producers who are engaged in retailing beef and have direct sales channels for other cuts from the animal
 - for producers who are charging a premium for their product

institutions:

- who are actively seeking local food
- who want to take the time to develop a direct connection to the producer
- who value specific attributes of the beef they buy, such as grass fed

- who have a flexible cost structure or budget to pay a premium for those attributes and the relationship.

The producer-driven model requires the producer to be the point person selling the product, and coordinating its processing and delivery. The producer-driven model offers the most opportunity for educational outreach and community building because of the direct connection between the farm and the buyer; it also offers the greatest opportunity for profitability for the producer. The producer-driven model also presents the greatest logistical hurdles, it is time consuming and complicated on the buyer end, it is time consuming and complicated on the producer end, it can be difficult to secure processing services, and variability in quality of those services can be damaging to the long-term success of the business relationship.

Producer-Driven Model

Pros:

- Can provide direct sale profit margins for producers
- Premium product for buyer
- Ability for secondary benefits such as community education/ag education/food education
- Ability to “Know Your Farmer”
- Ability to develop direct, long lasting relationships
- Ability to make a deep, meaningful impact on a narrow audience of producers and institutions

Cons:

- Time consuming for producer and for buyer
- Small scale/single animal transactions
- May not be of value to beef producers who command a higher price point than even committed institutions with discretionary budgets can afford
- Will not alleviate the issue of dairy culls being shipped out of state and resold back as commodity ground beef
- Dependent on processor availability/quality of services
- Will make a significant impact on a few individuals but by and large will not benefit the majority of the producer or institutional population

The processor-driven model

1) offers the majority of the opportunity for regional beef to enter the institutional market.

2) is best suited for:

farms:

- that have culls as a cost center and need to find the most efficient and economical return on investment for them.
- that are not seeking diversified markets or new enterprises.

buyers:

- That are price and process driven institutional buyers who may value the concept of buying local but whose budgets and routine still dominate their decision making.

processors:

- who are seeking opportunities to create markets for themselves
- who have established sales channels and markets
- who are interested in expansion or optimizing efficiency and return on assets of existing infrastructure
- who are resourceful

In this model, the buyer-seller relationship is anchored around the processor and the institution or wholesaler servicing the institution. The processor-driven model presents several advantages to serving the institutional market. These advantages enable the processor-driven model to overcome five otherwise insurmountable hurdles to large scale penetration of the institutional market:

- 1) Sufficient volume of product
- 2) Streamlined ordering and delivery system
- 3) Access to processing services
- 4) Cost efficient processing
- 5) Ability to compete on price

Processor-driven model advantages:

Access to unlimited raw materials

The average annual cull rate on conventional dairies is one third of the mature dairy head. The cull rate reported from the producers interviewed for this research ranged from 19% for dairy to 2% for beef. At the time of this report, New England had 216,100 mature dairy, not to

mention its beef herds. Even at a 19% cull rate, this represents 41,059 culls available to supply local demand, more than sufficient to meet the 4,030 cull needs on the institutional market. While 4,030 culls may be difficult for any one producer or group of producers to coordinate, processors have connections and relationships with a wide network of farms in their area, thus they have are well suited to initiate outreach and source culls as needed to meet buyer demand. Unlike producers, they are not limited by a single farm's production. Because of this, the processor-model immediately resolves issues of insufficient volume and provides a streamlined sales channel for the buyer.

Control of Processing Services

Because the processor also controls the processing services, they have the ability to resolve issues three through four at their discretion. By having authority over the processing schedule, the processor can elect to work overtime, evaluate the financial feasibility of expanding hours/days of kill floor use and cutting, and analyze the schedule to fit these animals in on slow days as ways to service the new market without compromising service to existing customers.² By controlling the cut sheet, the processor can create a cut sheet aimed at optimizing efficiency and turning out volume, further creating processing efficiencies. Cut time for a custom cut-sheet can reduce productivity by 50% or more, slowing the process from one hour to two or more hours per animal.³

Existing Sales Channels for Prime Cuts

According to the processors interviewed 50% of their volume is built around their own private label products in which they buy animals and resell the meat. Processors are experts at efficiently processing animals and harvesting all usable parts for sale. Their core competency is on processing and selling meat, in a business built around tight margins, it will be more effective for long term success and regional replicability for the processor to handle the responsibility of selling and marketing the remainder of the carcass to finance an institution's purchase rather than requiring the buyer or producer to assume the role.

²Willingness to work after hours on such a project was cited from conversations held with processors, including Herring Brothers Meats and Adams Farm, June 2011.

³Cut times cited from conversation with Bill Tripp Locust Grove Farm, NY June 23, 2011.

Processor-Driven Model

Pros:

- Improved (albeit marginal) price for culls to producer
- Competitive price for buyer
- Marginal per unit profit, but high volume for processor
- Ability to increase processor volume, improving return on assets, increasing cash flow, increasing retention and expansion of trained staff
- Ability for processors to automate the process to optimize efficiencies and potential for profitability
- Has the potential to make a broad impact to a large percentage of producers, processors, institutions
- Has the ability to redirect dairy culls to stay local
- Streamlines ordering procedures and ease of access for buyers- high volume single point of contact

Cons

- Sourcing regional beef does not fit most food service buyers' current business models resulting in little to no demand thus will be a slow market adoption process requiring market development, someone to push the effort
- Will never be a high margin business

While the processor-driven model does not represent significant monetary gain to farms or processors, it does present the opportunity for dairy farms to receive a better price for their culls than the traditional options currently at their disposal because it will pay the going commodity rate, without deducting commission or trucking fees, and since the animals' destination is local, they will likely arrive less dehydrated and in better condition, yielding a better live weight. For processors it represents the opportunity to make marginal profit per unit, but with a high turn-over potential, thus reasonable increase to overall income over time. This increase in work flow will also improve return on assets, increase year round cash flow, and encourage retention and expansion of trained work staff and hours of operation.

The processor-driven model works when the price point, including any distributor mark-up, falls within an institution's price sensitivity range. This range will be largely based on the current commodity pricing for ground beef, the type of institution, and the volume the institution is buying. The range will fluctuate up and down corresponding to the market. The feasibility for a

processor to be successful in this market will depend on operating expenses and the ability to derive income from the other parts of the animal. In general, what the processor charges per pound for the ground beef needs to at a minimum cover the cost of purchasing and processing the animal. The opportunity for profit will come from the income received for the other cuts of the animal. Theoretically, the main variable affecting the price of ground beef is the price paid for the animal. This occurs when the processor's operating expenses and volume of ground beef to live weight ratio stay relatively constant, and the spread between the price paid for the animal and the price charged for the ground beef covers the operating expenses. On average this is also the single variable affecting the price fluctuations of the global market. As long as the local product is competitive at any one point and time, it should remain competitive at any and all times, even with global market fluctuations because it will be trending up and down in a static ratio to the global market price at a ratio that has already been deemed acceptable by the buyer.

Financial viability will therefore be dependent on the spread between the going rate for culls, the going rate for ground beef, and the spread needed in between for the processor and distributor to break-even/make a profit. In general the processor/price sensitive driven model can work as long as:

- the processor can generate break even or better off the ground beef and generate profit from harvesting and selling other parts of the carcass such as tenderloins and rib eyes.
- the price to institution including any distributor markup can still hit the \$2.00-3.00/lb price range for bulk ground beef.

Hurdles/Making It Happen

Up until now, the effort to increase sourcing of local ground beef into the institutional market has been largely accomplished on an individual basis. Until stake holders decide to push (invest the time and energy to cultivate the markets), and buyers decide to pull (demand local product), distributors and food service management companies will not allocate resources to supporting local ground beef, and the effort will be of little impact.

Katherine Sims of the Green Mountain Farm to School Network expressed it this way: "We still need to actively reach out to schools with access to locally grown ground beef; the schools are not yet begging for it."⁴ Unless there is buyer demand, distributors will not push the product because warehouse space is limited and priority is given to products with high turnover.⁵

⁴Louise Calderwood conversation with Katherine Sims, August, 2011.

⁵Distilled from conversations with distributors, including Sysco, August 2011.

To capitalize on the opportunities and encourage large scale, regional adoption, significant investment in time and resources will be required for market development. Because of low profit margins it is unlikely that any effort could be driven long term by a third party, but as producers and processors may already have limited access to manpower and financial resources, having initial assistance from a third party to drive market acceptance and create pull would greatly expedite the rate of acceptance along the supply and demand chain.

Trends

With respect to trends, the study found minimal difference in responses by state. Rather the differences were found to be from the type of institution and producer responding. For example, regardless of what state was being researched, price was volume dependent. Hospitals currently demand the least volume of ground beef, and were paying the most, followed by colleges who used more than hospitals but who paid less than hospitals, and K-12 who used the most and paid the least. Similarly, regardless of state, the producers fell into two groups: dairy producers who have culls as a by-product of their primary operation and who try to minimize their sunk cost when they discard these assets; and beef producers whose profit centers around their beef animals, who have few non-prime animals, and who are selling even their non-prime beef for a premium.

There were two exceptions to a general lack of geographic trends:

1. Vermont's institutions had a higher price sensitivity threshold than the other states.
2. Rhode Island institutions by and large did not participate in the research.

Perhaps Vermont's price threshold can be at least partially attributed to the attention being given to local food through recent initiatives such as the statewide buy local campaign, the burgeoning localvore movement, and the various recent studies centered on the local agricultural economy. It may be that over time these have begun to influence a change in the customer mindset regarding buying local, price sensitivity, and qualitative properties of the products they purchase.

With respect to Rhode Island, it is believed that the higher prevalence of the use of contracted food service companies was what led to zero completed responses, and that this could signify or exemplify the disinterest of outsourced food service providers in altering existing business models to accommodate local or regional meat.

Findings

Producers

From the producers interviewed, which included a sampling from organic and conventional beef and dairy, small and large herds across each state, the conclusion is that producers,

whether beef or dairy, selling culls or prime animal, have two primary decision making factors they use to gauge new markets/outlets: price and the value of their time.

On average, producers interviewed offered \$0.65/lb live weight as a fair price for dairy culls and \$0.81/lb live weight for non-prime beef animals. Given the present value-proposition for engaging the institutional market is only marginally better or equivalent to the current outlets producers have at their disposal it is not worth a producer's time to pursue unless the buyers and processors initiate the transaction.

In ending comments, many of the producers contacted expressed similar hopeful sentiments for providing local beef to the community. Their comments tempered hope with caution and skepticism from experience. In general, producers interviewed were interested in the project and longed for local institutions to serve local beef to their communities, mentioning children, other family members, and friends who eat at such institutions as personal reasons why they would like local meat to be served.

Processors

Similar to the producers, processors expressed skepticism mixed with a sense of hope that this could work out. They were aware of the reality of the commodity driven landscape, yet maintained a personal and empathetic desire to be able to keep things local if it were possible.

"I do think there is a need for this, if it could happen. We are shipping loads and loads of beef out of New England, and it should stay here, because it comes back here anyway. There is a need to keep things local."⁶

Processors do feel that even with their existing infrastructure they could increase what they are doing and fulfill some institutional volume. They are used to working on margins and are not only looking at the profit this opportunity represents but how it might boost other elements of their business for over-all improved viability. A proven processor-driven model that can be replicated and is in use in at least two states with favorable outcomes reported for all parties is one in which the processor buys in animals for resale, develops relationships with the buyers or distributors, services their needs, and harvests other elements of the carcass for resale to help make the model financially viable while remaining within the institutional market's price sensitivity for ground beef.

⁶ Kate Rumley telephone conversation with Arnold Luce, Luce's Maine Grown Meats, June 27, 2011.

Two examples of the Processor-Driven Model are presented for Financial Analysis

Processor 1 in 2011 was

- paying \$0.80/lb live weight
- charging \$2.15/lb for 80:20; \$2.25/lb for 85:15
- average spread to cover operating expenses = \$1.40/lb;
- 27% of income came from non-ground beef product sales
- distribution: some institutions retrieve the product themselves, others use a wholesaler who applies a 12-15% mark up (\$.34/lb).
- Total cost of ground beef to institution: \$2.15-\$2.59/lb

Processor 2 in 2010 was

- paying \$0.61/lb live weight
- charging \$2.30/lb
- average spread to cover operating expenses = \$1.69/lb
- 14% of income came from non-ground beef product sales
- regular K-12 wholesaler stored and delivered the meat, potential surcharge to school of 12% (\$.27/lb).
- Total cost of ground beef to institution: \$2.30-2.57/lb

Distributors

While distributors maintain large, efficient warehouses, their business models require rapid movement of goods in and out of their buildings. Sales staff make frequent requests for the addition of new items into the product line offered, however, the products that receive attention and longevity in the line-up are those that can demonstrate demand and high turnover. To date, locally sourced fresh ground beef for the institutional market has not been in high enough demand to warrant strong consideration and push by the distributors.

However, if the ground beef providers can meet the buyers' needs, there is opportunity, even in the face of vertical integration within the industry, and the product need not be pasteurized. A simple, fresh, bulk, ground beef will suffice. To provide an example of the degree to which there is opportunity: Sysco owns USDA inspected facilities for in-house fabrication of meat products, however, due to liability concerns it refuses to produce its own ground beef. Ground beef is one of the few products in which distributors want to maintain a clear demarcation between their company and ground beef processing, and given this, they are more than willing to work with outside vendors.

Institutions

Of the three institutional market segments, the healthcare industry represents the easiest point of entry for both producers and processors. There are several reasons:

- Hospitals appear to be early adopters
- They have the highest price point and elasticity
- From large scale to small scale (less than 100 beds to greater than 250 beds) they are interested in local beef.
- They are aware of the potential health benefits of certain types of meat and are willing to pay a premium for these attributes.
- They are evenly split between those who want to buy direct and those who want to buy through a distributor.
- They tend to have more autonomy and are independently managed.

While hospitals represent the easiest point of entry for both the producer and processor-driven models, they represent the smallest volume needs of the institutional market and therefore higher education and K-12 should not necessarily be overlooked.

The bottom line is, if we extrapolate out the survey results to the entire New England Institutional Market:

1. 29% of the institutional population is seeking a direct relationship with a producer and has a sensitivity threshold that can reach as high as \$4-5/lb for ground beef, if the product has certain attributes such as single source, grass fed, certified organic, etc.
2. 53% of the institutional population is interested in purchasing local product with local being the key attribute, if it came from their existing distributor.
3. The total New England institutional market uses approximately 6.2 million pounds annually.
4. Institutional buyers are willing to replace up to 25% of their total volume, representing an opportunity to source up to 1.55 million pounds, with a locally sourced product if suppliers can hit a \$2-3/lb price point.
5. 86% of this volume, 1.33 million pounds is purchased as bulk, ground beef, requiring no further processing (no pasteurizing, shaped and formed, cooked, flavored, etc).

Recommendations

Based on the conclusions, the research recommendations are as follows:

Needs

1. Processor Enterprise Analysis

To ensure as positive and successful a long-term outcome as possible, it is important for each processor to make certain it makes financial sense for them before focusing on the institutional market. It is recommended that business planning/financial consultants be hired to assist processors evaluate the opportunity one-on-one, as it pertains to their business.

Key questions:

1. what are their per unit operating expenses?
2. would the spread between what they paid for the animal and what they could charge to the institutions for the ground beef cover their per unit operating expenses?
3. Do they have outlets for any other cuts they could salvage, what are the price points they could receive for those products, and any costs associated with selling them?
4. What is the net per unit income potential from the processor-driven model for this particular business? Is it break-even or better?

2. Market Development

- **Facilitate Processor Outreach**
Assist processors connect with the buyers and distributors in their area to assess market demand, and begin the sales relationship process. Continue to cultivate product demand and awareness, and nurture the buyer-seller relationships through on-going outreach to processors, distributors, and institutional buyers.
- **Facilitate Producer Outreach**
Conduct outreach to producers raising beef for direct sale and present them with the opportunity to make outreach to interested institutional buyers in their area. Assist them with connecting the dots with the buyers seeking a direct connection to the farmer. Focus on buyers and distributors in Higher Education and Hospitals.
- **Affect long term change through championing revisions to the commodity bid program in the Farm Bill at the federal level.** If New England wants to encourage local agricultural economic development, it must look at bottlenecks in the larger system and how they can be overcome.

Advocate for the following changes:

1. The commodity bid program could be broken into a state by state bidding process. Having each state as a separate bid enables all businesses both large and small, local and non-local, the opportunity to bid. With the current bidding process, bids are not broken out by state or region, precluding small or regional businesses from participating. Having each state as a separate bid will encourage local businesses to consider serving the needs of their states and surrounding states.
2. Advocate for a definition for micro-enterprises for beef processing. At present the commodity bid program gives preference to “small businesses” but the designation for a small meat processing business is 500 employees. This definition is still far larger than any of the processors in New England, and provides no advantage.

Action Plan & Budget

1. Secure funding for each interested processor to conduct an enterprise analysis/feasibility study for entering the institutional market

Cost: \$4,000-10,000 per processor

2. Hire Agency of Agriculture Staff or coordinate with another third party entity to assist with market development. Goal: to expedite adoption of the producer and processor driven models by both the buyers and suppliers.

Tasks include:

- outreach/networking (marketing and logistics facilitation) to processors, distributors, and institutional buyers to begin the conversation of the processor driven model, create awareness and demand, and assist individuals overcome hurdles
- outreach/networking to producers to disseminate the report with the list of pre-qualified prospects for direct sale, and assist them with communication and overcoming hurdles.
- Work with K-12 to help schools creatively allocate commodity and non-commodity dollars.
- Advocate supporting and encouraging changes to the Farm Bill as recommended.
- Should changes in the Farm Bill be implemented,
 - educate processors about the opportunities
 - assist them with the bidding procedures
 - provide education and outreach to institutions to make them aware when local suppliers are available and are bidding on state or regional bids.

Cost: 1.0 FTE at a (Vermont) state employee pay grade of 21.

Fixed Expenses

Salary and Benefits	\$60,000
Travel, estimate 200 miles per week at \$0.48/mile	<u>\$ 5,000</u>
	\$65,000

Contacts for Next Steps

On the following five pages readers will find contact information for individuals interviewed who were interested in participating in either supplying or purchasing local ground beef. The information is in table format. For producers, processors, and distributors there is a column indicating which model each individual would prefer to operate under. For all audiences there are columns identifying how the individuals might wish to be involved in helping launch this initiative, from passive participant to leading the effort.

Please note that the contacts list is not by any means exhaustive. It does not represent the entirety of any audience's total population base. There are institutions, processors, and producers who may not have been contacted or who may not have responded to the survey who may be interested in pursuing this market.

This list is intended as a template and an active database that can be added on to and updated to facilitate networking by providing a pre-qualified list of market prospect leads for processors and producers, and by providing a pre-qualified list of supplier contacts for proactive buyers.

Dairy Producers Interested in Selling Local Beef to Institutional Market

Preferred Participation Model	If a program were created to help initiate this effort (market development), how would you like to be involved?			Farm	Contact	Phone	Address
	Leader	Active participant	Passive Participant				
MA							
Processor-Driven			X	Devine Farm Inc	John	(413) 549-5253	26 Knightley Road, Hadley, MA 01035
Processor-Driven			X	Smith's Country Cheese	Dave Smith	(978) 939-2778 smithcountrycheese@verizon.net	200 Otter River Road, Winchendon, MA 01475
Processor-Driven			X	Shaw Farm Dairy & Ice Cream Stand	Warren Shaw	(978) 957-0031	195 New Boston Road, Dracut, MA 01826
Processor-Driven			X	Pearson's Elmhurst Dairy Farm	Robert Pearson	(508) 865-2158	342 West Main Street, Millbury, MA 01527
Both				Oake Knoll Ayrshires	Terri Lawton	(774) 219-6257 cell ; home (508) 543-6460; terri_lawton@yahoo.com	70 North Street, Foxborough, MA 02035
Both			X	Carter and Stevens Farm	Molly	(978) 355-4940; Molly's phone: 978-314-2879; carterandstevensfarm@gmail.com	500 West St. (Rt. 122), Barre, MA 01005
NH							
Both			X	Bohanon Farm	Jamie Robertson	(603) 746-4633	945 Penacook Rd, Contoocook, NH 03229
Maybe; Both				Crescent Farm	Sheldon Sawyer	(603) 756-4047 (maybe 4049)	420 Wentworth Rd., Walpole, NH 03608
VT							
Processor-Driven			X	Miller Dairy	Peter Miller	(802) 254-5304	Vernon, VT
Both		X	X	Brotherly Farm Organic	Craig Russell	(802) 276-9904	Brookfield, VT
Both		X		Kimball Brook Farm	Cheryl JD DeVos	(802) 425-3618	North Ferrisburgh, VT
ME							
Processor-Driven		X		Pine Hill Jerseys	Steven	(207) 872-6533 jwinrussel@roadrunner.com	475 Garland Rd Winslow, ME
Grassland Farm				T. Garin	(207) 474-6864	41 Grassland Ln., Skowhegan, ME	grasslandfarm@hotmail.com
Old Ackley Farm				Robert	(207) 374-5919	42 Ackley Farm Rd, Blue Hill, ME	
Processor-Driven			X	Castonguay Ayrshires, LLC	Mary	(207) 897-3724 marybastonguay@hotmail.com	39 Richmond Hill Rd Livermore, ME
Producer-Driven			X	Smith Family Farm	Lucian	(207) 288-4848	317 Crooked Rd, Bar Harbor, ME
CT							
Processor-Driven			X	Freund's Farm	Ben Freund	(860) 824-7524 Benjamin.freund@snet.net	324 Norfolk Rd, East Canaan, CT 06024

Beef Producers Surveyed Indicating an Interest in Local Beef to Institutional Market

Preferred Participation Model	If a program were created to help initiate this effort (market development), how would you like to be involved?			Farm	Contact	Phone	Address	e-mail
	Leader	Active participant	Passive Participant					
MA								
Both			X	Apple Valley Galloway Farm	Johanna	(413) 628-4773	1739 Hawley Road Ashfield, MA	johanna@ashfieldstone.com
Producer-Driven	X			Ioka Valley Farm	Don Leab	(413) 738-5915 and (413) 770 1657	PO Box 1045 Hancock MA 01237	info@iokavalleyfarm.com
Producer-Driven		X		Springdell Farm	Paula Robinson	(978) 486-3865 (978) 486-3726	571 Great Road Littleton MA 01460	springdellfarms@verizon.net
CT								
Both		X		Broad Brook Beef - From Double H Farm	Herb Holden	(860) 250-3311	47 Broad Brook Road, Broad Brook CT 06016; PO Box 307 Hartford County	herb@broadbrookbeef.com
Producer-Driven			X	Stuart Family Farm	Deb Stuart	(860) 210-0595; 860-210-1425	191 Northrup Street, Bridgewater, CT 06752; mailing address: 38 Town Line Road Bridgewater CT 06752	wstuartjr@aol.com
RI								
Processor-Driven			X	Heywood Farm	Robert Heywood, Adam Heywood, Joshua Heywood, Daniel Heywood	(401) 232-0554	1828 Atwood Avenue Johnston RI	heywoodfarm@msn.com
Both			X	Watson Farm	Don and Heather Minto	(401) 423-0005	455 North Road, Jamestown, RI	watsonfarm1796@yahoo.com
Producer-Driven			X	Windmist Farm	Martha Neale	(401) 529 9951 423 9767	71 Weeden Lane Jamestown, RI 02835	mneale13@hotmail.com
ME								
Producer-Driven		X		Archer Angus: Ray and Linda Buck		(207) 491-6354	209 Archer Road, Chesterville, ME 04938	archerangus.com
Producer-Driven				Grassland Farm	T. Garin	(207) 474-6864	41 Grassland Ln., Skowhegan, ME	grasslandfarm@hotmail.com
Producer-Driven				Old Ackley Farm	Robert	(207) 374-5919	42 Ackley Farm Rd, Blue Hill, ME	

Processors interested in Selling Local Beef to Institutions									
Preferred Participation Model	Name	Contact	Phone	Email	Activity	Street	City	State	Zip
CT									
Processor-Driven	Bristol Beef	Art Birallio	(860) 589-9969		Slaughter	785 Middle Street	Bristol	CT	06010
Processor-Driven	Baretta Provision	Bill or Dan	860-828-0802		Processing (no slaughter)	172 Commerce Dr.	East Berlin	CT	
Processor-Driven	Litchfield Locker	Bob	860-567-5448		Processing (no slaughter)	205 East Street, P.O. B	Litchfield	CT	06759
MA									
Processor-Driven	Adams Farm Slaughterhouse LLC	Ed Matlby	(978) 249-9441	emaltby@comcast.net	Slaughter Processing	854 Bearsden Road	Athol	MA	01331
ME									
Processor-Driven	Herring Brothers Inc.	Trey	(207) 876-2631	herringbros@hotmail.com	Slaughter, Processing	346 Water Street	Guilford	ME	04426
Both	Luce's Maine Grown Meats	Arnold Luce	(207) 635-2817		Slaughter, Processing	366 Embden Pond Road	North Anson	ME	04958
Processor-Driven	Sanford Butcher Shop	Paul	(207) 324-2800		Slaughter, Processing	578 Lebanon Street	Sanford	ME	04073
NH									
Producer-Driven	Lemay and Sons	Rick Lemay	603-622-0022	lsb2600@aol.com	Slaughter, Processing	116 Daniel Plummer Rd	Goffstown	NH	03045
RI									
Processor-Driven	Rhode Island Beef & Veal	Joel	(401) 474-6855; (401) 232-7220		Slaughter, Processing	60 Armento Street	Johnston	RI	02919
VT									
Both	Vermont Livestock, Slaughter & Processi	Carl Cushing	802-877-3421		Slaughter / Processing	76 Depot Road	Ferrisburg	VT	54569692
Producer-Driven	The Royal Butcher, LLC	Royal	802-728-9901		Slaughter / Processing	882 VT Rte 12A	Braintree	VT	05060
Both	Westminster Meats	Dan Mandich	(802) 722-3133	dmandich@westminsterme	Slaughter / Processing	52 Seafood Lane	Westminster	VT	05159
NY									
Processor-Driven	Hilltown Pork		518-781-4050			12948 Rte 22 (Mass Pike to	Canaan	NY	12029
Both	Locust Grove Farm		518-638-8591		Slaughter / Processing	4725 State Rte 40	Argyle	NY	

Distributors Who Responded Stating An Interest in Selling Local Beef to Institutions

Preferred Participation Model	If a program were created to help initiate this effort (market development), how would you like to be involved?			Business Name	Name First	Name Last	Business Street Address	Town	State	Zip	Region Served	Phone	Email
	Leader	Active participant	Passive Participant										
Processor-Driven	X			D&S Distributors	Don	Maynard	85 Ind Park Rd	Hardwick	VT		Northeast Kingdom		
Processor-Driven		X		Dennis Paper & Food Service Company	Chris	Caler	101 Mecaw Road	Bangor	ME	04401	ME	207-947-0321	Chris.caler@dennisexpress.com
Both			X	Reinhart (formerly burlington food service)	Fernando	Cresta	784 Hercules Drive	Burlington	VT		MA/VT/NH/NY	802-655-7595x310	
Processor-Driven				Sysco Northern New England	Louie	Cavallero	36 Thomas Drive	Westbrook	ME	04092	New England	800-632-4446; 207-871-0700	http://www.sysconne.com/orderze/1070/Page.aspx
Both			X	Upper Valley Produce	Allen	Freund		Waterbury	VT		VT	800-281-7161	afreund@uppervalleyproduce.com
Both				Black River	Tom	Biggs					VT	802 230 4800 x 14	tbiggs@blackriverproduce.com
				Dole & Bailey	Carl	Dematteo					New England	339-440-2200	carldematteo@mac.com
			X	Donabedian Brothers	Greg/Susan	Donabedian	475 S Broadway	Salem	NH	03079	Rockingham, NH	603-898-9781	donabedianbros@comcast.net

Institutions Interested In Buying Local Beef

Type of Institution	Preferred Method of Sourcing Local Beef	Being part of Effort/Interest in Buying Local Beef	Leader	Active participant	Join	Name	Job Title	Institution	Address	City/Town	State	Zip Code	Phone	Email
School	Distributor	Maybe	No	Maybe	Maybe	Gail Sharry	Child Nutrition Manager	New London Public Schools	134 Williams Street	New London	CT	06320	860-447-6064	sharryg@newlondon.org
School	Distributor	Yes	No	Maybe	Yes	Barry Sbordy	Food Service Director	Putnam Public Schools	33 Wicker Street	Putnam	CT	06260	860-963-6933	sbordyb@putnam.k12.ct.us
School	Distributor	Yes	Yes			Timothy Cipriano	Executive Director	New Haven Public Schools	75 Barnes Ave	New Haven	CT	06513	203-946-8813 ext 11	timothy.cipriano@new-haven.k12.ct.us
School	Distributor	Yes	No	Maybe	Yes	Tim Paquette	Food service Director	Stonington Public Schools	40 Field Street	Pawcatuck	CT	06379	869-599-0766	tpaquette@stoningtonschools.org
School	Distributor	Maybe	No	No	Maybe					Mansfield	CT			foodserv@mansfieldct.org
College/University	Distributor	Maybe	No	No	Yes	Jody Thompson	GM Sodexo	Western Connecticut State University	181 White St.	Danbury	CT	06810	203-837-8764	jody.thompson@sodexo.com
School	Distributor	Yes	No	No	Yes	Ernie Koschmieder	Director Food Services	Windham Public Schools	322 Prospect Street	Willimantic	CT	06226	860-465-2608	ekoschmieder@windham.k12.ct.us
College/University	Distributor	Maybe	No	Maybe	Maybe	Paul Denaro	Assistant Director Dining Services	Tufts University	89/91 Curtis St	Medford	MA	02155	617-627-3596	paul.denaro@tufts.edu
School	Distributor	Maybe	No	No	Maybe	Megan	Food Service Director	Town of Braintree	128 Town St	Braintree	MA	02184	781-380-0444	msardema@braintreema.gov
School	Distributor	Maybe	No	Maybe	Yes	John Overcash	Food Service Director	Littleton Public Schools	55 Russell Street	Littleton	MA	01460	9784868938 x 1243	jovercash@littletons.org
School	Distributor	Maybe	No	Maybe	Maybe	J. Mendes	Food Service Director	Berkley Public Schools	21 N. Main Street	Berkley	MA	02779	508 884 9434 x 318	jmendes@berkley.k12.ma.us
School	Processor	Maybe	No	No	Yes	Ken Whittier	FSD	Bedford Public Schools	97 McMahon Rd	Bedford	MA	01730	781-275-9129	thedders
School	Distributor	Maybe	No	Maybe		Catheine Donovan	FSD	Hamilton-Wenham Schools	787 Bay Road	Hamilton	MA	01982	978-468-0398	donovanc@hwschools.net
School	Distributor	Maybe	No	No	No	Susan Murray	Food Service Director	Duxbury Public Schools	130 St. George Street	Duxbury	MA	02332	781-934-7669	susan.murray@compass-usa.com
Hospital/Healthcare	Distributor	Yes	No	Yes	Yes	Roger M. Knysch	Director of Nutrition and Foodservices	Fairview Hospital, Berkshire Health Systems	29 Lewis Ave.	Great Barrington	MA	01230	413-854-9618	rknysch@bhs1.org
College/University	Distributor	Yes		Yes		Kathleen Zieja	Director	Smith College	30 Belmont Ave	Northampton	MA	01063	413-585-2300	kzieja@smith.edu
School	Distributor	Yes		Yes	Yes	Ann Pitzen	Food Service Director	Leicester/Auburn Schools	1078 Main Street	Leicester	MA	01524	508-892-7040 x113	apitzen@leicester.k12.ma.us
School	Farmer	Yes	Yes	Yes	Yes	Alden Cadwell	Food Service Director	Concord Public Schools	120 Meriam Rd	Concord	MA	01742		acadwell@colonial.net
School	Farmer	Yes	Yes	Yes	Yes	Bob Kinch	Food Service Director	Maynard Schools	3 Tiger Drive	Maynard	MA	01754	978-897-6100	kinch@maynard.k12.ma.us
College/University	Distributor	Yes	Maybe	Yes		Eric Johnson	Food Production Manager	Sodexo	100 State Street	Frammingham	MA	01701	508 626 4066	ejohnson@framingham.edu
School	Distributor	Yes	No	Maybe	Yes	Andrew Stratton	Director of Dining Services	Chartwells, Granby Public Schools & Easthampton Public Schools	200 Park Street	Easthampton	MA	01027	413-529-1535	andrew.stratton@compass-usa.com
College/University	Distributor	Maybe	No	No	Maybe	Frank Gillespie	FSM Sodexo	Gordon-Conwell Theological Seminary	130 Essex St.	South Hamilton	MA	01982	978-468-7111	fgillespie@gcts.edu
School	Farmer	Maybe		Yes		Judith Campbell	Director of School Nutrition	Scarborough schools	9 Wentworth Dr	Scarborough	ME	04074	207-730-4701	Jcampbe@scarborough.k12.me.us
School	Farmer	Yes		Maybe		Deborah Dolley	Food Service Director	Falmouth Public Schools	74 Woodville Rd.	Falmouth	ME	04105	781-7429	ddolley@fps.k12.me.us
School	Distributor	Yes	No	Yes		Ron Adams	Food Service Director	Portland Public Schools	28 Homestead Ave	Portland	ME	04103	207-874-8231	radamsr@portlandschools.org
School	Farmer	Yes	Yes	Yes		James Demers	Director	York School Nutrition Program	469 US Route One	York	ME	03909	207-363-6554	jdemers@yorkschools.org
School	Farmer	Yes	No	Maybe	Yes	Mary Emerson	School Nutrition Director	MSAD 55	137 South Hiram Road	Hiram	ME	04041	207-625-2490	memerson@sa55.org
College/University	Distributor	Yes	No	Yes		Mike Heffernan	GM	Sodexo@Colby-Sawyer College	541 Main St	New London	NH	03257	603-526-3770	mheffernan@colby-sawyer.edu
School	Distributor	Yes	Maybe	Yes	No	Jim Connors	Food Service Director	Manchester School District	195 McCreagor St.	Manchester	NH	03102	603-624-6300 x165	jconnors@mansd.org
School	Processor	Yes	Yes			Justin	Kitchen Mgr	Milford High School	71 Souhegan St	Milford	NH	03055	603-673-4201 ext 3237	thammerstrom@sau40.com
School	Distributor	Yes	No	No	Yes	Morgan Trahan	Food Service Director	John Stark Regional High School	618 No. Stark Highway	Weare	NH	03281	603-529-5305	morgan.trahan@sau24.org
School	Distributor	Yes		Yes		Jeanne Pierce	Director	Exeter Cooperative Schools	1 Blue Hawk Dr	Exeter	NH	03833	603 775 8449	jpierce@sau16.edu
Hospital/Healthcare	Farmer	Maybe	No	Maybe	Maybe	Sam Fazio	Food Service Director	Alice Peck Day Memorial Hospital	125 Mascoma St.	Lebanon	NH	03766	603-448-3121	fazio@apdmh.org
College/University	Distributor	Yes		Maybe	Yes	ChrisMongeon	Food Service Director	Plymouth State University	MSC 20, 8 High St.	Plymouth	NH	03265	603.535.2710	cmongeon@mail.plymouth.edu
Hospital/Healthcare	Farmer	Maybe	No	No	No	Sheila R. Delworth	Food Purchasing	Northeast Vermont Regional Hospital	Hospital Drive	St. Johnsbury	VT	05819	802-748-7479	s.delworth@nvrh.org
School	Processor	Maybe	Yes	Maybe	Yes	Heather Champney	Kitchen Manager	Mettawa Community School	5788 VT Rte. 153	West Pawlet	VT	05775	802-645-9009	hchampney@brsu.org
School	Distributor	Maybe	No	Maybe	Maybe	Christine LaPoime	Director of Nutritional Services	South Burlington School District	500 Dorset St	South Burlington	VT	05403	802-652-7160	clapoime@sbschools.net
School	Processor	Maybe		Maybe	Maybe	Peggy Meunier	Food Service Director	Shelburne Community School	345 Harbor Road	Shelburne	VT	05482	802-383-1112	pmeunier@cssu.org
Hospital/Healthcare	Distributor	Yes	No	Yes	No	Laura Brace, CDM, CFPP	Director of Nutrition Services	Porter Medical Center	115 Porter Drive	Middlebury	VT	05753	802-388-4775	lbrace@portermedical.org
School	Distributor	Yes	Yes	Yes		Nicole Fournier	Food Service Director	The Abbey Group	6212 Vt Route 105	Enosburg	VT	05450	802-373-1242	nicole@abbeygroup.net
School	Distributor	Yes		Yes	Yes	Steve Davis	Food Service Director	Colchester School District	131 Laker Lane, PO Box 900	Colchester	VT	05446	802-264-5706	daviss@csdvt.org
School	Distributor	Yes		Yes	Yes	Wendy Howard	FSM	Montgomery Town School	249 School Drive	Montgomery Center	VT	05471	802-326-4618	whoward@montgomeryk8.net
School	Farmer	Yes		Yes	Maybe	Paul Morris	Food Service Director	Harwood Union High School	458 VT Rt. 100	South Duxbury	VT	05660	802 382 1113	pmorris@harwood.org
School	Farmer	Yes		Yes		Alison Forrest	Food Service Manager	Brewster Pierce School	120 School St	Huntington	VT	05462	802-434-2074	feedkidswel@hotmail.com
School	Farmer	Yes	Yes			Dave Homer	Food Service Director	Chittenden East Supervisory Union	211 Bridge Street	Richmond	VT	05477	802-249-2711	david.homer@cesu.k12.vt.us
School	Distributor	Yes	Yes			Steven Marinelli	Food Service Director	Fitz Vogt & Associates Barre City Schools	155 Avers Street	Barre	VT	05461	802 476 6362	smarinelli@fitzvoigt.com
School	Distributor	Yes	No	No	No	Anne Coolidge	Co-food Service Manager	Monkton Central School	PO Box 40 1036 Monkton Rd	Monkton	VT	05461	802-453-2314- ext 30	acoolidge@anesu.org
School	Distributor	Yes	No	Maybe	Maybe	Leo LaForce	Food Service Director	Champlain Valley Union HS	369 CVU Road	Hinesburg	VT	05461	802-482-7176	llaforce@cvuhs.org
School	Farmer	Yes	No	Yes	Yes	Karen Russo	OSSU School Nutrition Director	O.S. Supervisory Union	24 Central Street	Randolph	VT	05060	802-728-3397 or 728-9555	krusso@orangesw.k12.vt.us
School	Distributor	Maybe		Yes	Yes	Christopher Hunter	Food Service Manager	Ita	2531 Lin Rd Rd	Lynndownville	VT	05851	802-526-3209	chishunter@cruspschools.net
School	Not Specified	Maybe	No	No	Yes	Amanda Gifford	Admin/Food Service Director	Avalon Triumvirate Academy	1841 Main St	Fairfax	VT	05454	802-849-2488	atschool@surfglobal.net
School	Distributor	Maybe	No	Maybe	Maybe	Lisa Rock	Food Coordinator	Laraway Youth and Family Services	PO Box 621	Johnson	VT	05656	802-635-2805 x208	lisaR@laraway.org
School	Farmer	Yes	Maybe	Yes		Paul Lamarre	Ex Chef	Sodexo Services@ St Johnsbury Academy	100 Main St	St Johnsbury	VT	05819	802-748-1041	plamarre@stjacademy.org
School	Farmer	Yes	No	Yes		Annette L Burrington	Food Service & Nutrition Director	Barnet School	163 Kid Row	Barnet	VT	05828	802-633-4678	aburrington@kidrow.net
School	Farmer	Yes	Yes	Yes		Jennie Sweet	Food Service manager	Waits River Valley School	6 Waits River Rd	East Corinth	VT	05040	802-439-5534	jsweet@wrvs.org
School	Farmer	Yes	Maybe	Yes	Yes	John Vogt	GM	Sodexo	725 Veterans Ave.	Newport	VT	05855	802-624-0471	john.vogt@sodexo.com
School	Farmer	Yes		Yes	Yes	Scott St John	Food Director	Cabot School	PO Box 98	Cabot	VT	05647	802-563-2289	buckmaster72@yahoo.com
School	Farmer	Yes	Maybe	Yes		Laura Collaro	Food Services Manager	Lincoln Community School	1708 South Lincoln Rd	Lincoln	VT	05443	802-453-5877	lcollaro@anesu.org
College/University	Processor	Yes	Maybe	Yes		Melissa Zelazny	FSM Sodexo	University of Vermont	408 South Prospect St.	Burlington	VT	05405	802.656.4664	melissa.zelazny@uvm.edu