



9/13/23 WWFSP LUNCH & LEARN

MEAT PRODUCTION AND PROCESSING INFRASTRUCTURE AND LABOR STUDY IN THE CENTRAL AND SOUTH PUGET SOUND REGION

MIKE POTEET, SENIOR PLANNER

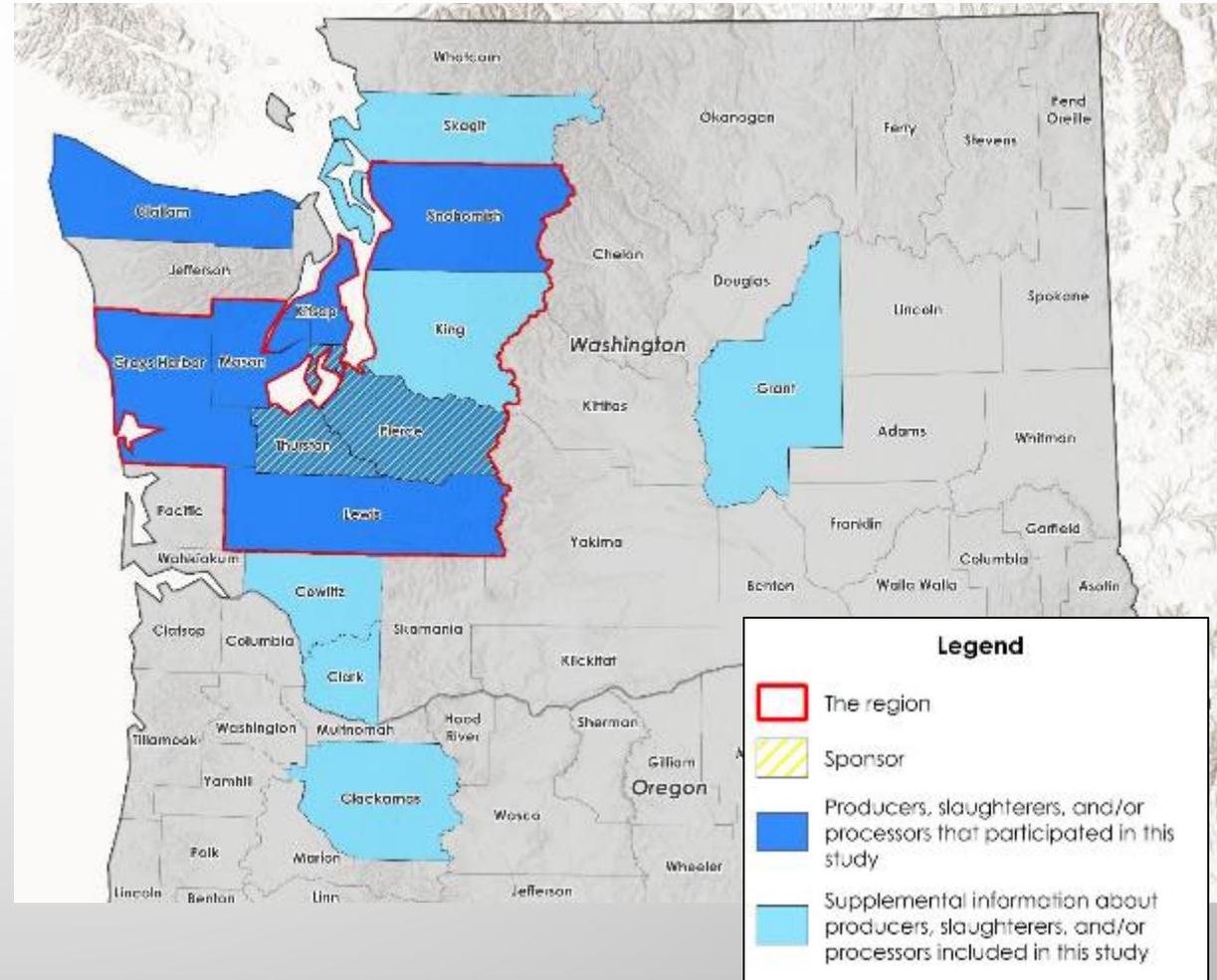
PIERCE COUNTY DEPARTMENT OF PLANNING & PUBLIC WORKS

OVERVIEW



PROBLEM STATEMENT

WHILE LABOR SHORTAGES, INADEQUATE INFRASTRUCTURE, AND EQUIPMENT NEEDS HAVE BEEN CHALLENGES FACING THE MEAT INDUSTRY NATIONWIDE, PARTICULARLY DURING THE PANDEMIC, THERE ARE ISSUES AND SOLUTIONS THAT ARE UNIQUE TO THE CENTRAL AND SOUTH PUGET SOUND REGION.



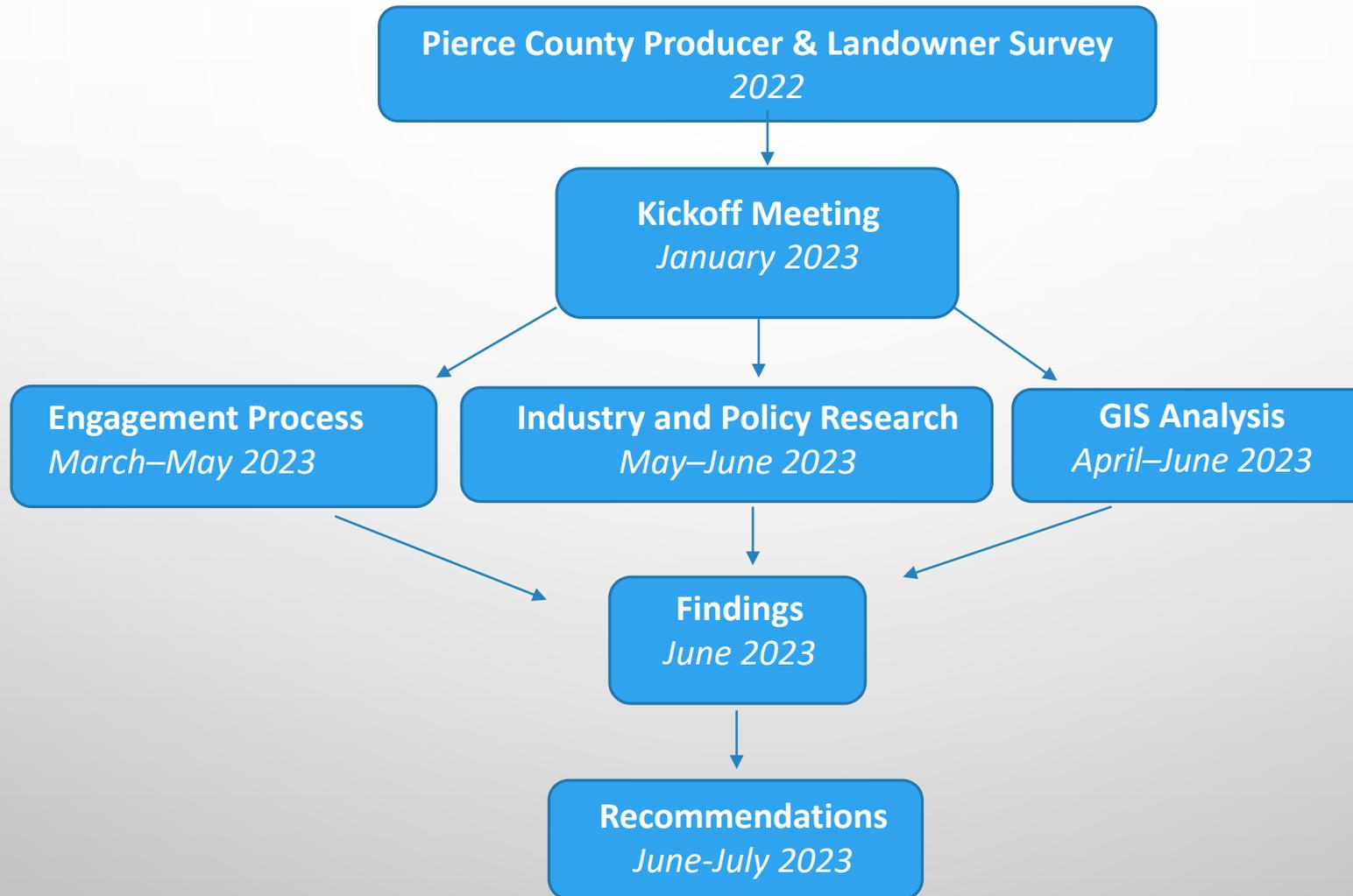
BACKGROUND



Two pathways for Slaughtering & Processing:

- **USDA:** Meat products can be sold through retail outlets and interstate commerce (stores, restaurants)
- **WSDA:** Live animals can be sold through the Custom Meat Exemption (household use only)

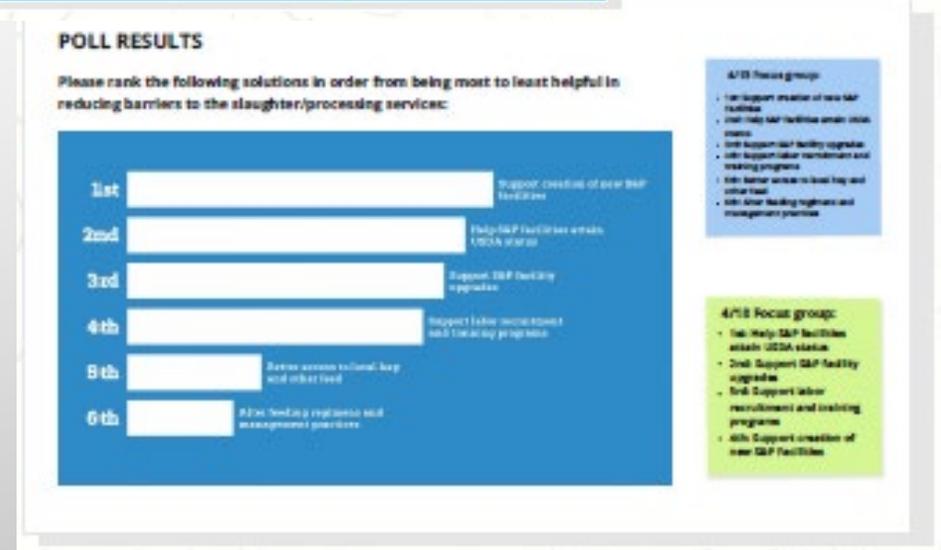
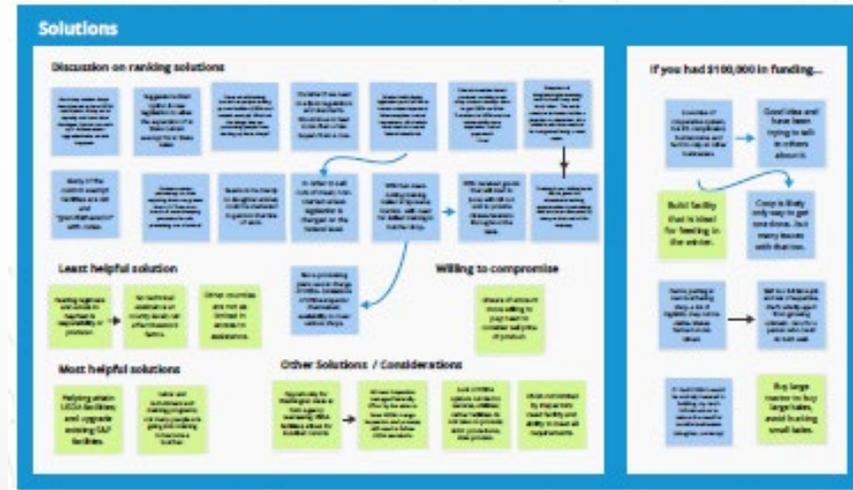
Picture credit: WSDA



ENGAGEMENT



- INVITED 14 REGIONAL PARTNERS TO **PROJECT KICKOFF**
 - CONSERVATION DISTRICTS
 - COUNTY AGRICULTURE PROGRAMS
 - FARM BUREAU CHAPTERS
 - WSU EXTENSION
- **SURVEY OF >100 PRODUCERS, 6 SLAUGHTERERS, 2 PROCESSORS, AND 6 SLAUGHTERER/PROCESSORS**
- **FOCUS GROUP WITH 13 PRODUCERS, REPRESENTING 11 FARMS**



Engagement

PRODUCER BARRIERS

- LIMITED AVAILABILITY OF SERVICES AND SUBSEQUENT NEED FOR ADVANCED SCHEDULING
- COST
- AVAILABLE LAND
- AVAILABLE EQUIPMENT TO HAUL ANIMALS (IN SOME AREAS)
- EXPERIENCE AND EDUCATION GAP

PRODUCER PROPOSED SOLUTIONS TO BARRIERS

- SUPPORT CREATION OF NEW SLAUGHTERING & PROCESSING (S&P) FACILITIES
- HELP S&P FACILITIES ATTAIN USDA STATUS
- SUPPORT S&P FACILITY UPGRADES
- SUPPORT LABOR RECRUITMENT AND TRAINING PROGRAMS
- S&P SCHEDULING PORTAL
- EDUCATION AND OUTREACH
- MOBILE SLAUGHTER UNITS AT STATIONARY LOCATIONS

Engagement

SLAUGHTERER BARRIERS

- WASTE MANAGEMENT
- FACILITY/EQUIPMENT CHALLENGES
- VARYING CAPACITY
- FUEL AND TRAVEL TIMES
- SCHEDULING

SLAUGHTERER PROPOSED SOLUTIONS TO BARRIERS

- EQUIPMENT TO INCREASE CAPACITY (MORE ESTABLISHED BUSINESSES)
- ADVERTISING TO GAIN CUSTOMERS (NEWER BUSINESSES)



Picture credit: Pierce Conservation District



Picture credit: Puget Sound Processing

Engagement

PROCESSOR BARRIERS

- STORAGE SPACE & SCHEDULING
- WASTE MANAGEMENT
- LABOR CHALLENGES (BALANCING WITH SEASONALITY; SKILLED LABOR POOL)
- COST
- EXPANDING CAPACITY

PROCESSOR PROPOSED SOLUTIONS TO BARRIERS

- GRANTS AND LOANS FOR PROCESSORS
- FUNDING TO EXPAND PROCESSING CAPACITY, PRIMARILY WITH MORE COLD STORAGE SPACE



Picture credit: Niche Meat Processor Assistance Network

Industry & Policy Review

- STATE POLICIES
- FEDERAL FUNDING AND GRANTS
- STATE FUNDING AND GRANTS
- GRANT RECIPIENT SUCCESS STORIES



Picture credit: WA State Dept. of Enterprise Services

Industry & Policy Review

Grant Recipient Success Story – Marzolf Meats in Snohomish Co.

Received a \$200,000 grant from the USDA's Meat and Poultry Inspection Readiness Grant in 2022 which will help them:

- Increase processing capacity
- Upgrade their facility to offer USDA cut and wrap services and onsite USDA slaughter services
- Enable more producers to pursue retail sales opportunities through providing USDA processing and slaughtering services
- Develop a new platform to facilitate more purchases of local products by local retail outlets

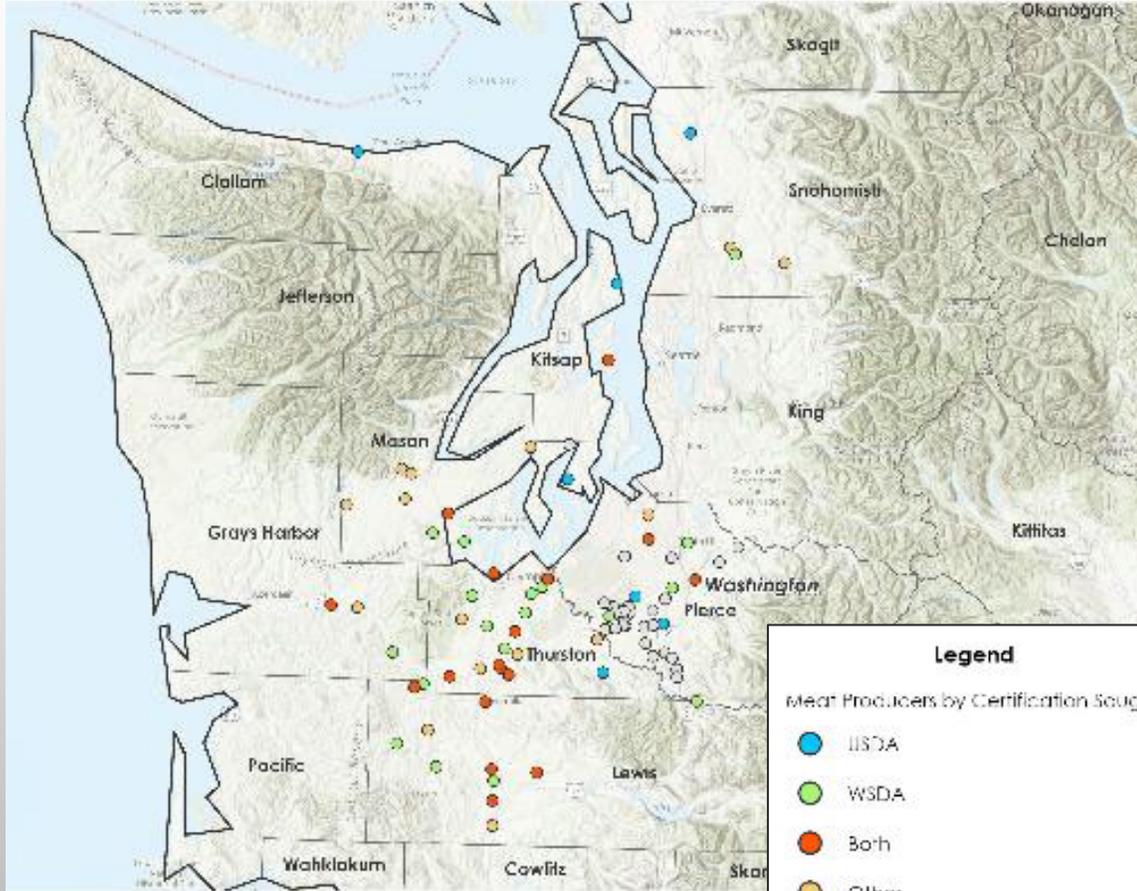
Industry & Policy Review

Grant Recipient Success Story – WSDA grants

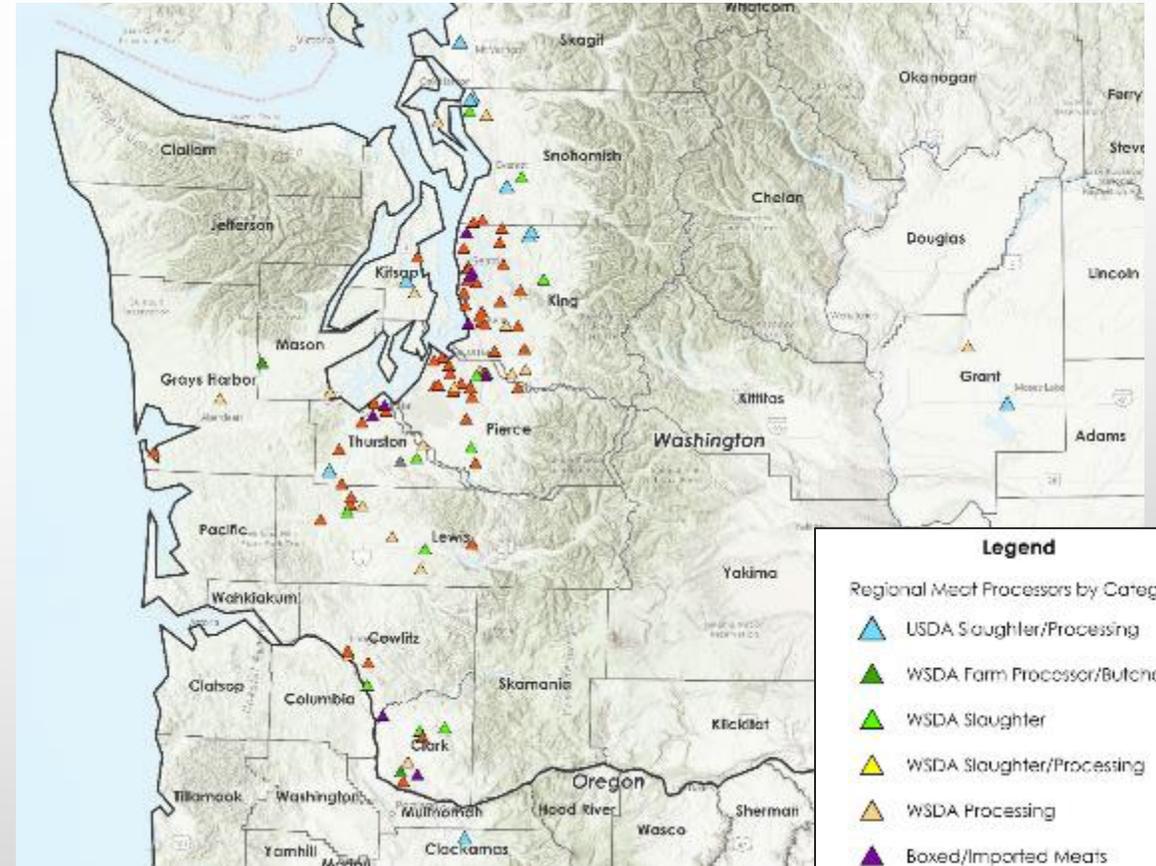
One WSDA-licensed processor received \$75,000 from the Local Meat Processing Capacity Grant program and \$75,000 from the WSDA Local Food System Infrastructure Grant program which has helped them:

- Double their cutting floor space
- Increase holding areas for animals scheduled for slaughter through available mobile slaughter services on site
- More than double their cold storage space
- Begin plans to offer slaughter and processing services full-time, year-round
- Potentially double their total operating capacity and improve slaughter efficiency

FINDINGS



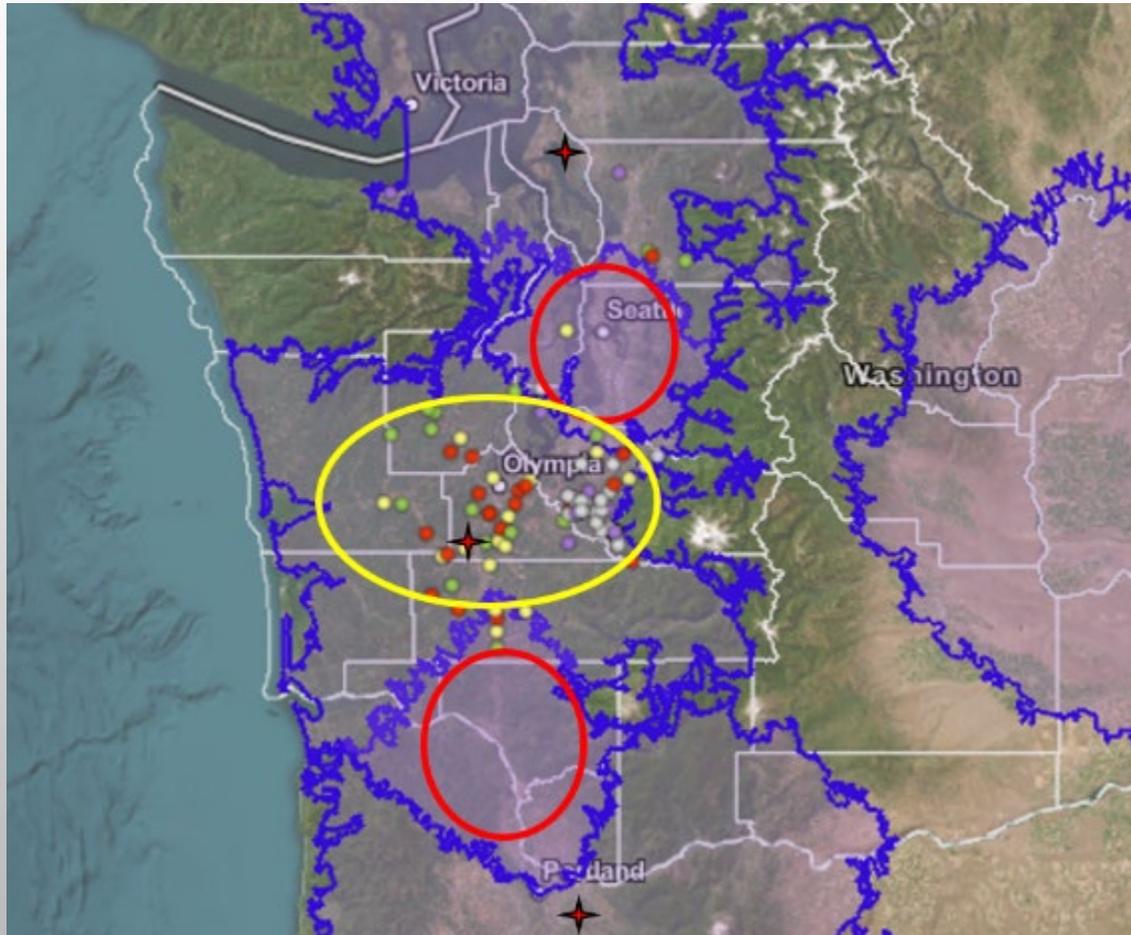
Producers that participated in the engagement process



Slaughtering & processing facilities in the region

FINDINGS

DRIVESHED ANALYSIS



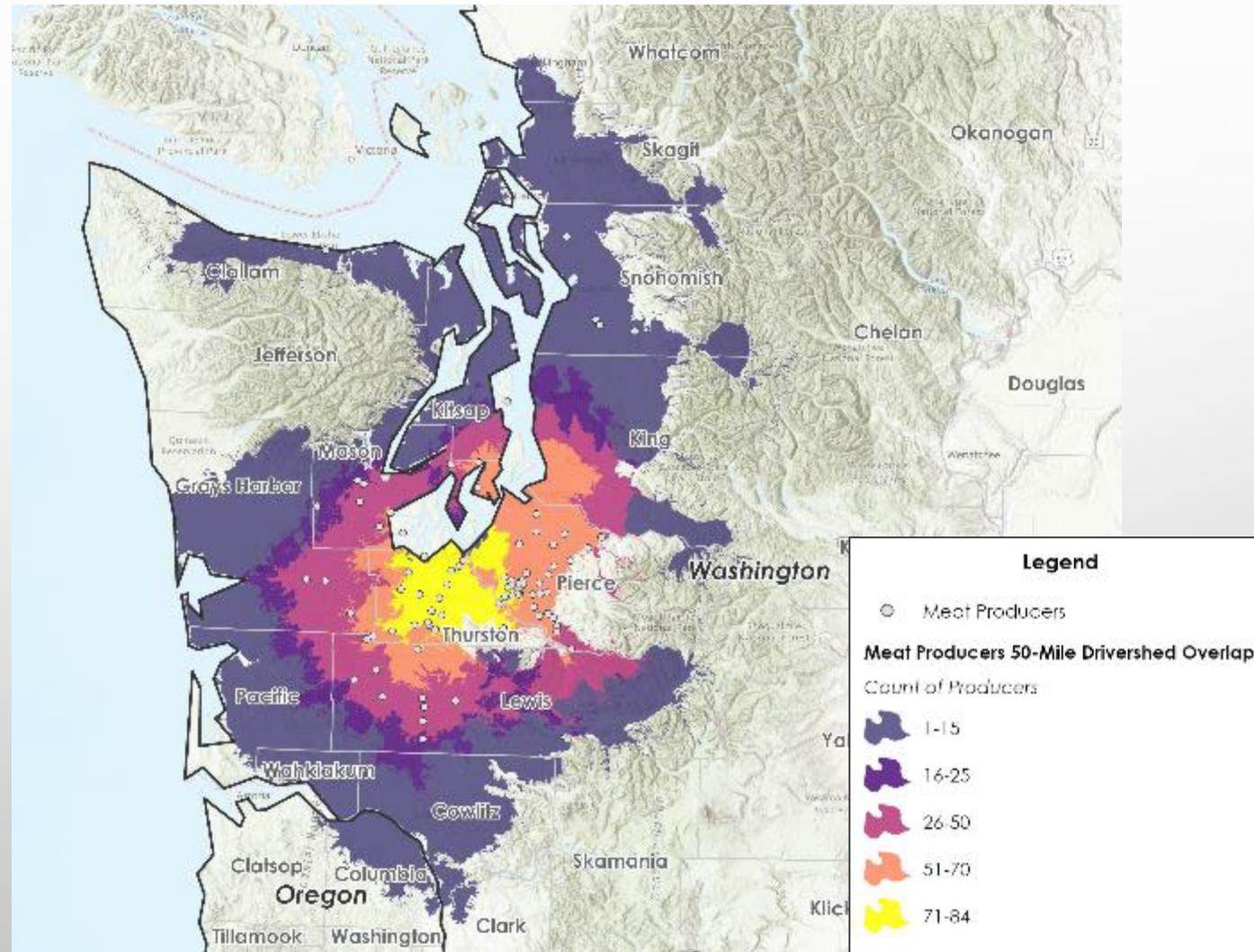
GEOGRAPHICAL OVERLAP OF USDA SERVICES

- AT TIME OF THIS STUDY, 3 USDA S&P FACILITIES OPERATING WEST OF THE CASCADES IN NW OR AND PUGET SOUND REGION
- PRODUCERS NORTH OF PIERCE AND SOUTH OF THURSTON COUNTIES HAVE 2 OPTIONS WITHIN THEIR 100-MILE DRIVESHEDS

FINDINGS



50-mile
driveshed
analysis for
producers



FINDINGS



FIGURE 7: PROPOSED NEW S&P FACILITY LOCATIONS

Based on accessibility for producers.

RECOMMENDATIONS



- NEW WSDA & USDA FACILITIES
- STATE POLICY
- INCREASE INFRASTRUCTURE THROUGH STATE GRANTS
- INCREASE INFRASTRUCTURE THROUGH FEDERAL GRANTS
- S&P SCHEDULING PORTAL
- CENTRAL SERVICE HUBS
- MENTORSHIP PROGRAM
- APPRENTICESHIP PROGRAM
- WSDA-LICENSED CUSTOM MEAT MARKETING
- BUFFALO AND BEEFALO

OUTREACH



- **JULY 11, 2023:** PRESENTATION TO PIERCE COUNTY COUNCIL
- **JULY 31, 2023:** PRESENTATION TO THURSTON COUNTY BOARD OF COMMISSIONERS
- **AUGUST 16, 2023:** DISTRIBUTION OF FINAL REPORT TO PROJECT PARTICIPANTS, LOCAL GOVERNMENTS, AND INDUSTRY PARTNERS
- **FALL 2023:**
 - BRIEFING TO THURSTON COUNTY AGRICULTURE ADVISORY COMMITTEE
 - BRIEFING TO PIERCE COUNTY AGRICULTURE ADVISORY COMMISSION
 - SHARE INFORMATION WITH LOCAL, STATE, AND FEDERAL PARTNERS
 - OUTREACH TO FOOD SYSTEM PARTNERS THROUGH LUNCH-AND-LEARNS



Questions?

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