

Market Analysis: Consumer Valuation of Meat Processing

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Photo courtesy the New England Meat Conference.

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Executive Summary

The relationship between the producer and processor is a symbiotic one in which each requires the other to succeed. If sales of producers' product go up, demand for processors' services rise. To this end, the goal of this study was to explore consumer perception of the livestock processing industry to identify strategies producers and processors could adopt to increase market share by responding to current and future trends in purchasing behavior.

The key finding was that while consumers don't want to think about where or how their meat is processed they want to be able to trust that "the system" works. They expect the system to provide food that is safe to eat from businesses conducting themselves in a manner that is ethical. They want to know who is producing their food, where it is from, what is in it. They want to buy meat that is appealing to look at, that is fresh and ready to cook. Top trends now and on the horizon are flavor-enhanced products such as "smoked," "dry-aged," and "cured," while the leading feature consumers will be looking for in five years will be "GMO-free" meat.

How producers and processors can work to meet these needs:

1. Focus on package and presentation appeal. Make product cuts look appealing to eat, make the label eye catching to see, and make the product easy for buyers to handle and stock (stackable packages).
2. Focus on fresh as opposed to frozen local meat. Consumers are thinking of their next meal when they shop, most meat sales are in the form of fresh vs frozen product. Selling "previously frozen" meat is a strategy many retailers employ to reduce shrinkage while enabling them to stock there fresh case. Use this as a way to begin getting more Vermont meat into the fresh display case.
3. Focus on adhering to production and processing protocols to improve ability to consistently deliver the same quality and presentation a product has come to be known for to retain consumer base.
4. Provide discrete, indirect marketing tools to educate consumers and raise awareness for how your products are raised and processed. For example, on packaging provide a link to your website for consumers to "learn more about your products and how they are made."
5. Consider joint marketing efforts in which producers and processors organize "open houses" to encourage consumers and buyers to develop a connection with their meat, and gain an understanding of who and how it is raised and the processes it goes through in between. Help create awareness and respect for the livestock industry and processor profession.
6. Consider investing in the infrastructure upgrades or management changes necessary to meet third party certifications to both production and processing practices so more

Vermont meat can meet the requirements of large scale retail buyers such as Whole Foods and regional aggregators such as Pineland Farms Natural Meats and be competitive with brands such as Niman Ranch.

7. Take advantage of trends in consumer marketing to drive sales:

- Focus marketing messages and visuals on promoting the family and people involved in the production and processing process. Focus on the Vermont connection. Consumers respond better to pictures of people, and are more interested in who grew the food and where it was grown than in the animals themselves.
- “Smoked,” “cured,” and “dry-aged” are in. Consider making products with these attributes and highlighting them in your packaging and messaging.
- GMO-free is the wave of the future. Consumers are increasingly asking for GMO-free meat. Explore the financial and logistical viability of offering GMO-free meat in your operation. Make a point of highlighting your GMO-free product lines in your packaging and messaging.
- Consider how your operation, product, or marketing efforts could be refined to best help Vermont meat take advantage of the top factors influencing consumer purchasing behavior. The top attributes influencing meat purchases were cited as follows:
 1. Price
 2. Being a Local Product/Family Story
 3. Visual Appeal at Point of Sale/Immediate Applicability Towards Meal Preparation
 4. Animal Welfare protocols
 5. Feed/Production protocols
 6. Food Safety protocols
 7. Flavor Enhancers/Ingredients
 8. Social and Environmental Justice

Introduction

The Vermont Meat and Poultry Processors Association conducted interviews with retail buyers and processors in the regional and national meat industry to investigate whether consumers' perception of slaughter and processing impacted their perception of meat quality and safety and influenced purchasing behavior. The goal of this research is to increase market share for the Vermont livestock industry through providing producers and processors with information that can help fine tune operations and marketing to respond to current and future trends in purchasing behavior.

Research Methodology

Interview Technique

In-depth first person interviews were conducted with a targeted list of key constituents in the buying and processing chain of the livestock industry to obtain a robust dialogue on the consumer valuation of processing in their meat purchasing decision-making. The objective was to generate a descriptive picture of participants' opinions on current and future marketing trends within the industry.

Interview Question Content Development

The Vermont Meat and Poultry Processors Association developed an interview questionnaire based on criteria associated with livestock production and processing that the association was interested in understanding from the consumer's perspective. Questions focused on uncovering current and future influencing factors driving meat purchasing making decisions, gauging current and projected levels of consumer interest in knowing how meat is processed, understanding whether and how to best market this information, understanding whether and which specific elements of animal production and processing resonate with the consumer base, and identifying recommendations for what Vermont could be doing to increase market share for the Vermont livestock industry.

Interview Contact List

An interview contact list was generated from the 2013 New England Meat Conference registration. Twenty four contacts were selected to represent perspectives from local, regional, and national Distributors, Aggregators, Retail, Chefs/Restaurants, Meat packers, Cutting Edge Processors, and Certifying Agencies.

Introductions were made to an initial sixteen contacts. Ten interviews were conducted and sample product packaging, point of sale and messaging from three Cutting Edge Processors/Aggregators were collected.

Distributor and Aggregator Interviews were held with Black River Produce, Hardwick Beef, Pineland Farms Natural Meats, and Savenors. Retail Interviews were held with City Market, Coop Food Stores, The Meat Market, and Whole Foods. Chef/Restaurant Interviews were held with The Farmhouse Group. Meat Packers and Processor Interviews were held with Lorenz Meats. Packaging, point of sale and messaging were collected for Applegate Farms, Niman Ranch, and Smart Chicken.

Findings

Ignorance Is Bliss

Overwhelming consensus from all ten individuals interviewed was that consumers place a surprisingly high level of trust in government's oversight of the American food system, in the retail and restaurant establishments they frequent, and in the meat brands they purchase. Consumers take for granted that their food supply must be safe and ethical otherwise the product in question wouldn't be offered for sale.

When pressed to consider where their meat is coming from, interviewees felt consumers resonate most with where and how an animal was raised.

Consumers avoid confronting any remaining aspects of the production process preferring instead to assume that if the animal was raised well it will die well. Consumers also tend to assume other practices of the production process such as labor conditions and environmental concerns are also being upheld. "As long as it's organic it's good. If it's local, it's slaughtered right" are examples of common assumptions consumers make noted Frank Pace, The Farmhouse Group.

Fifty percent (5) of those interviewed felt consumers actively avoid thinking about what happens between the time the animal leaves the farm and the meat is on display, and that trying to engage this discussion will, or has, resulted in negative purchasing behavior. Thirty percent (3) of those interviewed felt consumers neither actively or passively avoided the topic, but rather that it wasn't an important enough concern that it was rising to a level of conscious awareness; and twenty percent (2) said there may be a very small percentage of the population "maybe 1-3% of a highly educated consumer base" who would be interested, but that even within this sub-section "they are only mildly interested" Arion Thiboumery, Lorentz Meats, January 8, 2014.

CONSUMER PERCEPTIONS ON LIVESTOCK PROCESSING

"They don't think about the processing and don't want to think about what happens in between [leaving the farm and being on display in the meat counter] and I don't think talking about it is a good idea. They assume sanitation [for example] is a given. [A marketing campaign] Saying "hey, I'm cleaner than the next guy" is going to turn them off, really."
CHUCK LACY, HARDWICK BEEF

"There's a definite disconnect [about livestock processing], we have to be very careful. Nobody wants to get into what happens to the live animal. Consumers just want to trust that it was well cared for before it became retail meat."
JOHN NICHOLSON, WHOLE FOODS MARKET

"The reference of slaughter is very symbolic but it freaks a lot of people out. A lot of people become vegetarian after watching the movies, videos and books [about processing]. Definitely not [do not promote] on the label."
FRANK PACE, FARMHOUSE GROUP

When asked to prioritize which, if any, of the following industry practices (animal welfare, environmental sustainability, labor conditions, local ownership, and trained/skilled employees) as related to the livestock processing industry resonated with consumers, interviewees prioritized them from greatest to least influential as follows:

1. animal welfare
2. social justice (labor conditions and fair pay)
3. environmental sustainability (“green business practices”)

However, all respondents were quick to note that it was difficult to prioritize any of these as the processing aspect of the livestock industry is not one that consumers respond to. However, when pressed animal welfare would be the most likely to resonate, followed far behind by labor conditions, and even further behind by environmental sustainability.

Regarding local and the concept of trained staff, it was noted that many consumers value the skills of trained butchers but associate this with the butcher preparing cuts of meat in front of them at the meat counter or restaurant, not meat packing staff in the slaughterhouse.

Local is an increasingly important feature in the sale of many foods, but again, with respect to the slaughterhouse, while it is a feature that would resonate, consumers don’t want to think about the slaughterhouse, regardless of whether it is local or not. For the few consumers who would be interested in engaging, interviewees felt that knowing a processing facility is local and family owned and offers good jobs with full benefits packages would be of value, but it would need to be marketed discretely and indirectly.

Smart Chicken: The Anomaly

How come Smart Chicken promotes its processing and is successful with its message?

When asked how come Smart Chicken was successful using a marketing message focused on its differentiated processing, all interviewees were quick to point out that while Smart Chicken does bring up processing as a key message, the element of processing they bring up is how the technique used results in a better tasting product. It is because of this angle that they can bring up the processing discussion. They are conveying a message that says “buy this it tastes better.” Their secondary messaging does not further highlight their processing facility’s labor conditions or animal welfare, it jumps straight back to animal welfare, feed, and production protocols of live birds. See the marketing messages highlighted in the packaging below.



How Smart Chicken markets its processing: as a consumer benefit.

Tecumseh Farms



SMART CHICKEN

ROASTED CHICKEN BREAST

Tecumseh Farms Smart Chicken® roasted chicken breast features only hand-trimmed, premium chicken and spices, offering a savory, lightly smoked flavor.

*Our chickens are fed only the finest grain, and are raised without the use of antibiotics or animal by-products. Our combination of humane treatment, sustainable practices, and state-of-the-art facilities guarantee you a true, premium product.

TASTE THE AIR-CHILLED DIFFERENCE®

A FULLY COOKED PRODUCT
KEEP REFRIGERATED OR FROZEN



Distributed by
Tecumseh Poultry LLC
Producers of Smart Chicken®
Waverly, NE 68462
WWW.SMARTCHICKEN.COM

Ingredients: chicken breast, water, salt, sugar, corn starch, carrageenan, natural smoke flavor, and celery powder.

Rubbed with: sea salt, evaporated cane syrup, paprika, onion powder, dehydrated chicken broth, brown sugar, red bell pepper granules, and parsley.

Nutrition Facts

Serving Size 2 oz (56g)
Servings Per Container 3.5

Amount Per Serving

Calories 60 Calories from Fat 5

% Daily Value*

Total Fat 0.5g 1%

Saturated Fat 0g 0%

Trans Fat 0g

Cholesterol 0mg 0%

Sodium 350mg 15%

Total Carbohydrate 1g 0%

Dietary Fiber 0g 0%

Sugars 0g

Protein 12g

Vitamin A 0% Vitamin C 0%

Calcium 0% Iron 0%

*Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your calorie needs.

Calories	2,000	2,500
Total Fat	Less Than 65g	80g
Saturated Fat	Less Than 20g	25g
Cholesterol	Less Than 300mg	300mg
Sodium	Less Than 2,400mg	2,400mg
Total Carbohydrates	300g	375g
Dietary Fiber	25g	30g

Calories per gram: Fat 9 • Carbohydrate 4 • Protein 4

TASTE THE AIR-CHILLED DIFFERENCE®

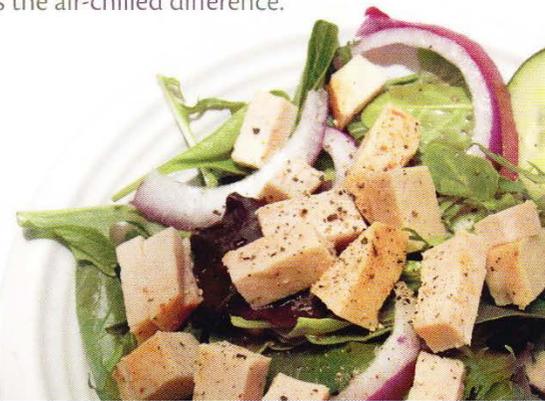
New!

SMART CHICKEN®
ROASTED CHICKEN BREAST

Healthy & Flavorful

Enjoy the savory, lightly smoked flavor of Smart Chicken® Roasted Chicken Breast on your favorite sandwich or salad, or add it to your favorite recipes. Our Roasted Chicken Breast is made with only premium, hand-trimmed, boneless, skinless chicken breasts and contains no preservatives, MSG, or gluten.

When you purchase Smart Chicken® Roasted Chicken Breast, you can be sure you're getting a premium, high-quality product that's raised in a humane and sustainable fashion, without the use of antibiotics, growth stimulants, or animal by-products. All Smart Chicken® products are 100% all-natural, and are processed using purified cold air instead of added non-potable water—that's the air-chilled difference.



Tecumseh Farms
SMART CHICKEN



How Smart Chicken markets its processing: as a consumer benefit.

Buying Behavior

The top three influences on meat purchasing behavior are:

1. price
2. "local"
3. point of sale appeal

The issue of price is not new. Consumers have limited disposable income therefore price is always a concern. The other two top considerations, local and product appeal, however, provide some interesting opportunities for Vermont meat sales.

With respect to local, consumers want to know where there meat is from. More importantly, they want a connection with the farmer or farm family growing the food. According to John Nicholson from Whole Foods Markets, marketing campaigns highlighting the farm family with pictures of the people sell more product than marketing campaigns featuring the animals. Frank Pace, the Farmhouse Group, summed up this sentiment noting that the reason people come to Farmhouse Group restaurants is the location of the meat: where it was raised and *what farm* it comes from.

The third key feature cited was product appeal. Consumers make meat purchasing decisions based on immediate needs: the next meal. They are less focused on stocking the freezer. Consumers are highly influenced by what looks good, what is ready to cook, and what are the time and skill requirements necessary to cook what is on display. From these parameters consumers will narrow their options to those that could be feasible for the upcoming meal, then price and any other variables are entered into the equation and a final decision is made.

Consumer Purchasing Influences*

1. Price
2. Being a Local Product/Family Story
3. Visual Appeal at Point of Sale/Immediate Applicability Towards Meal Preparation
4. Animal Welfare protocols
5. Feed/Production protocols
6. Food Safety protocols
7. Flavor Enhancers/Ingredients
8. Social and Environmental Justice

*prioritized by number of times cited by interviewees

CONSUMER DECISION MAKING: HOW CONSUMERS THINK

Amanda's Buying Hierarchy:

- 1) Put food on the table. Buy whatever I can afford.
Benefit: ensure personal survival
- 2) Put safer food on the table. Use any extra money to buy safer/higher quality food, food with health and taste claims such as certified organic, grass fed, better tasting, more tender.
Benefit: improve personal quality of life
- 3) Do something good for someone else. Use any additional extra money to buy food with altruistic claims such as eco-friendly, fair trade, profits support charitable causes, etc.
Benefit: altruistic, improve quality of life for others

AMANDA CHARLAND, COOP FOOD STORES

"[My recommendation is to] Put 'product from Vermont' on the packaging. Vermont has great acceptance, [especially] in New York."

JOHN NICHOLSON, WHOLE FOODS MARKET

"If the steak looks good, they like the package, they buy it."

DAVID ORDWAY, PNFM

Added Value

In addition to the core factors influencing purchasing decision, when disposable income is available more features and benefits are entered into the equation. Factors listed in order from most to least cited as influencing purchasing behaviors were:

- animal welfare standards
- feed and animal raising protocols
- food safety
- taste attributes and ingredients (which can positively and negatively influence decisions for example additives such as water solution, salt, preservatives, and nitrates may deter, while additives such as smoked, cured, seasoned may drive a sale.
- Altruistic features such as social and environmental attributes, and charitable causes

“The # 1 thing people will pay more for is ‘dry aged’ and ‘smoked.’ They will pay more for these attributes than even the claim that it is ‘local.’”

AMANDA CHARLAND, COOP FOOD STORES

“Anything ‘green’ or socially conscious will resonate with 70% of buyers [in our store].”

JAMIE LEWIS, CITY MARKET

Trends

Over the next five years two trends are projected to emerge.

1. GMO-Free

The most highly referenced trend on the horizon was a growing demand for GMO-Free meat. In fact, Jamie Lewis at City Market felt this change was already in progress at his store.

City market is already seeing trends changing... “local trumps organic, and non-gmo trumps local.”

JAMIE LEWIS, CITY MARKET

2. Rising cost and reduced confidence in commodity beef may make Local beef desirable and accessible

The assumption is that the cost to produce commodity meat may rise at a higher rate than the cost to produce local, grass fed, or certified organic product and thus the margin in price difference could shrink, enabling more of the consumer base to consider local product as an option if they are going to buy meat.

Reasons for this assumption include the increasing recurrence of severe droughts as a result of climate change impacting feed lots in the west and mid-west; the reliance on the rising cost of grain in commodity operations; and the rising number of recalls in large commodity operations, which are predicted to continue increasing.

All these factors may create a retail environment in which the commodity product price goes up, consumer confidence goes down, and the local product sitting next to it looks more and more like a good value and the better choice.

Buzz words & Marketing Messages

When asked for any buzzwords, marketing terms or claims being used in the industry, interviewees came up with several, GMO free being the most prevalent followed by locally grown. The complete list below has the claims in order from those that surfaced from most to least frequently in the interviews.

Trending Buzzwords

- GMO free
- Local/locally grown
- Grass Fed (non-corn/grain fed)
- Dry Aged
- Smoked
- Naturally Raised
- Pasture Raised
- Organic
- Air chilled (chicken)
- Whole Animal Butchery

In addition to buzzwords, some insight was given on what consumers are looking for in marketing messages or on packaging. For example one interviewee mentioned that consumers want to know whether a product has additives (such as sodium water solutions, or nitrates). Another noted that stating 'Product from Vermont' on packaging resonates with consumers, especially in metro regions, such as New York City. Another comment was made that stories and pictures about people and the farm families that grow the meat resonate better than pictures and stories of animals.

In stores that uphold social justice concerns such as environmental sustainability, fair labor practices, animal welfare, etc., in their business principles and decision

making (these include stores like City Market, Whole Foods Market, and the Coop Food Stores, as examples) incorporating anything 'green' or socially conscious about you, your product or your business in your marketing will resonate with approximately 70% of their buyers.

Recommendations for Increasing Sales of Vermont Meat

The study revealed several opportunities that producers and processors can leverage to increase market share for Vermont meat.

Presentation

Focus on presentation and fresh offerings.

The product has to be appealing to the eye and ready to eat/prepare. To do so, fresh is best.

Attractive packaging and label

Processors can help by making and packaging cuts so they look as appetizing and professional as possible. Also, make the easy to stack for retail staff. An attractive, well presented meat package will draw people's attention.

Producers can focus on designing an eye catching logo to stand out on the shelf and in promotional materials.

More fresh versus frozen.

The benefit of meat is that it can be frozen and thus has a fairly long shelf life. However, in a retail setting fresh product will sell at a much higher rate than frozen, and be of more interest to a greater percentage of the consumers. Use the ability to offer fresh product to your advantage.

Processors can help by offering to return fresh product to the producers rather than frozen.

Producers can help by making a point of having thawed product available for sale when in retail situations (such as farmers markets), and offering thawed or fresh product to their retail and restaurant accounts, and encouraging retail accounts to place some of their frozen product to thaw and display in the fresh counter, replenishing as needed with frozen product from the cooler. Retail accounts often place "previously frozen product" for sale in their fresh display counters for meat, poultry, and seafood.

Consumer Confidence

Focus on consistently providing above average quality and delivering on your customer expectations and brand promise

To establish and maintain a loyal following, securing repeat purchasers and winning over new consumers, local product quality must live up to the marketing promise made on the packaging AND the higher expectations consumers have of products selling at a premium. It is not enough to be local anymore. It has to be LOCAL and be GOOD.

Processors can help by ensuring they make their customers cuts and packaging look as appealing as possible and as easy for retail staff to handle as possible (make them stackable and easy to display). They can also help by placing a high priority on animal welfare to reduce stress prior to and during slaughter.

Producers can help by focusing on adhering to growing and feeding protocols that yield consistent taste, mouth feel, fat content, and size of animals. They can also help by focusing on sending animals in groups of several at a time which fosters a sense of herd on the trailer reducing stress during transportation.

Market the Farm Family & Local Connection

Stories about the farm families, the human connection, sells.

Consumers want to feel a connection to the family and the farm, not to the animal.

Processors and producers can both evaluate their marketing materials and consider how to improve what they currently use to include more pictures of the people involved and the stories of the people involved.

Market the Vermont Connection

If the product is from Vermont, let people know.

The Vermont brand continues to be a leading attribute that resonates with consumers both in and out of state.

Processors and producers can both benefit by ensuring the label and marketing materials say “Produced in Vermont,” “Processed in Vermont,” or “Produced and Processed in Vermont.” Etc.

Discretely Raise Awareness and Consumer Education

Provide indirect access to more information.

While consumers may not want to be faced with the reality of an animal's life while considering what to make for dinner, they do, ultimately want to know they are doing the right thing. For the small but growing percentage of consumers who are beginning to question the system, make an effort to provide a non-intrusive mechanism by which they can verify their assumptions are correct. For example, on your packaging invite them to your website to learn more about your production, processor, or processing techniques. Below are examples of how leading national brands are doing it.

How Applegate Farms does it





How Niman Ranch does it

Organize Processor and Farm Tours

Create a sense of good will and trust in the industry and in your business in particular.

Processors and producers can both help by working together to invite the public to see into the world of meat production and processing. The invitation whether or not accepted, has the psychological effect of instilling a sense of security that if the invitation is there, the person can feel confident the processors and processing system being toured must be “doing it right,” and those that do go are genuinely interested and gain a further appreciation for the local food system. Ultimately consumers don’t want to think about the process but they do want reassurance that their faith in the food system is well placed. Organizing and offering tours also elevates the level of accountability on all producers and processors, whether participating or not. It reinforces the standards all participants in the supply chain should be living up to, and that the public trusts they are adhering to.

The benefit of opening the processors and producers to visitors is not necessarily a direct sales driver but is a sales and marketing tool that can help gain customer loyalty from consumers and buyers. If producer sales are growing, processor sales will grow. Ultimately, this type of synergy and joint marketing will yield strengthened commitment on behalf of consumers and buyers to buy local, leading to a stronger, more viable

livestock production and processing industry in the state, and an industry consumers are proud of, and want to support.

To give an example, here's how Thousand Hills Cattle Company (the producer) and Lorentz Meats (their processor) are doing it.

[Thousand Hills Cattle Co. Provides Realistic Tour of Livestock Farming](#)

Posted in [Farms & Gardens](#) on Thu, 07/22/2010 by Angelique Chao -



Opportunities to escape the concrete jungle and get a taste of small-farm life abound in the Minnesota summertime. Whether you'd like to do a basic farm tour, enjoy dinner served up right on the pastures where the food was raised, or even help out with farm chores for a day as part of a "crop mob," you can find an option that gets your city-slicker self out in the fields for at least a few hours.



One fine Friday a couple of weeks ago, about 40 of us curious folk took advantage of one such opportunity to join a monthly tour run by [Thousand Hills Cattle Company](#), a beef producer based in Cannon Falls specializing in 100 percent grass-fed, primarily local, meat. And we got more than a stroll through the pastures, which is what makes this tour stand out among others that I've taken. In addition to guiding us through his ranch, Todd Churchill, the founder of Thousand Hills, gave mini-lessons in nutrition (human and cattle) and land management to explain the purported health and sustainability benefits of pasture-based farming. Plus, we ate a delicious free lunch featuring Thousand Hills burgers and

beef franks. Finally, we went where his cattle go after a lifetime of grazing has come to a conclusion -- [Lorentz Meats](#), the slaughter and processing plant that Thousand Hills uses.

Usually farm tours stick to the fun and photogenic parts of farming: the rolling hills, the pumpkin patch, maybe even the baby-animal barn, if you're lucky. This tour refused to allow you to ignore the grimmer side of raising livestock for food, and there's a lot to be said for that. As we all piled into the Lorentz Meats lunchroom, which ironically houses the viewing deck that overlooks the slaughterhouse's kill floor, people immediately gravitated to the window to see the action. A couple of parents brought their young children along, clearly intending for them to learn the whole story of where their food comes from. The mood was sober and respectful, but stopped short of being either sad or sentimental. In fact, most of the tour-goers were impressed with Lorentz's dedication to both humane animal treatment and clean, safe food, and told our tour leader so as they left the room.

That's not to say that no one was shaken at the sight of cows being led systematically to their deaths. One sometime-vegetarian I met was visibly disturbed, but said she felt better after seeing the cow herd at Churchill's ranch (which we visited after Lorentz Meats). The cows milling in the shade of huge old trees looked, she said, like they had a good life. Another visitor concurred, saying "They seem like happy cows to me!" And indeed, they were calm and collected as could be, even with a crowd of people gaping at them. The lush grass clearly trumped our presence as an object of interest.

If you are interested in exploring the lives of grass-fed cattle from beginning to end, Thousand Hills Cattle is offering two more tours this summer, on August 9 and September 10. Visit its [open house page](#) for details.

Meet Third Party Audit Standards

Processing and production standards

Many regional and national brands, such as Pineland Farms Natural Meats have customers (Hannafords, Whole Foods, Walmart, Costco) who require the producer's meat to be safe and to perform to very, very high standards. This places requirements on both the producer and the processor.

Processors can help by having the infrastructure available to be able to provide grading services, enabling customer's meat to be graded choice, prime, select or no-roll. Additionally they can be animal welfare approved and participate in third party food safety audits. If they can make these claims to their customers, then more customers

could begin selling to chain retailers. At present the closest processor that meets these three requirements according to Pineland Farm Natural Meats, is JBS in Pennsylvania.

Producers can help by providing source verification, becoming Global Animal Partnership animal welfare approved (<http://www.globalanimalpartnership.org/the-5-step-program/>), and following any further specific breeding, husbandry, handling, raising, feeding and finishing protocols.