

MOUNTAIN

EST.  2021

MEAT SUMMIT

- BRIDGING THE CONTINENTAL DIVIDE -

JANUARY 11-12 2023

2023 SUMMIT EVALUATION



In partnership with:

ILF



International Livestock Forum
a program of NWSS and CSU



FOOD SYSTEMS INSTITUTE
COLORADO STATE UNIVERSITY



OVERVIEW

On January 11th and 12th 2023, Colorado State University hosted the **9th annual International Livestock Forum and the inaugural Mountain Meat Summit**. The event brought together 173 attendees including students, producers, industry leaders, government professionals, and members of academia to discuss domestic and international livestock and food production. Attendees came from 20 different states and two countries.

The event was hosted by Colorado State University Department of Animal Sciences, Colorado State University Office of Engagement and Extension, the National Western Stock Show, and the National Meat Summit Committee. The event was sponsored by the National Western Stock Show, CoBank, Farm Credit, United States Department of Agriculture Agricultural Marketing Service, Western Sustainable Agriculture Research and Education, and Colorado State University Food System Institute, and took place in two locations. Industry tours departed from Denver on January 11 to explore meat value chains for large, mid-scale and small processors and their partners, and the conference itself was held at the Colorado State University campus in Fort Collins on January 12.

The overarching goal of the event was to advance market opportunities, build connections, and support collective skills development and learning across many segments and scales of the Mountain West's meat supply chain. This was accomplished through:

- Unique tours of Colorado's livestock and meat enterprises, behind-the-scenes access to the National Western Stock Show and the new CSU Spur campus,
- An industry sector update featuring Randy Blach with CattleFax, Erin Borrer with the US Meat Export Federation, and Sara Place with CSU AgNext,
- Interactive and dynamic panel discussions featuring 24 different panelists, moderators and speakers,
- Curbside consulting opportunities representing nine different technical assistance providers, and
- Networking sessions.



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PRE AND POST SURVEY RESULTS

Online pre- and post-surveys were conducted to evaluate the conference outcomes for the participants (meatsummits.com/summit-2023/survey). We received 93 usable responses for the pre-survey and 50 usable responses for the post-survey. Linking pre and post survey respondents, we obtained 38 respondents for whom we could measure outcomes from participating in the conference.

In the pre-survey, participants were asked to describe their role in the meat industry (**Figure 1**). There was nearly equal participation from ranchers/producers and educators/researchers. Educators also included technical assistance providers and non-profit organizations focused on producer outreach and engagement. Fifty-five percent of respondents were female and 42% were male. Eighty-three percent of respondents identified as white, 9% identified as Black or African American, 5% identified as Hispanic or Latino, and 1% identified as American Indian or Alaskan Native. The average age of participants was 40 years old.

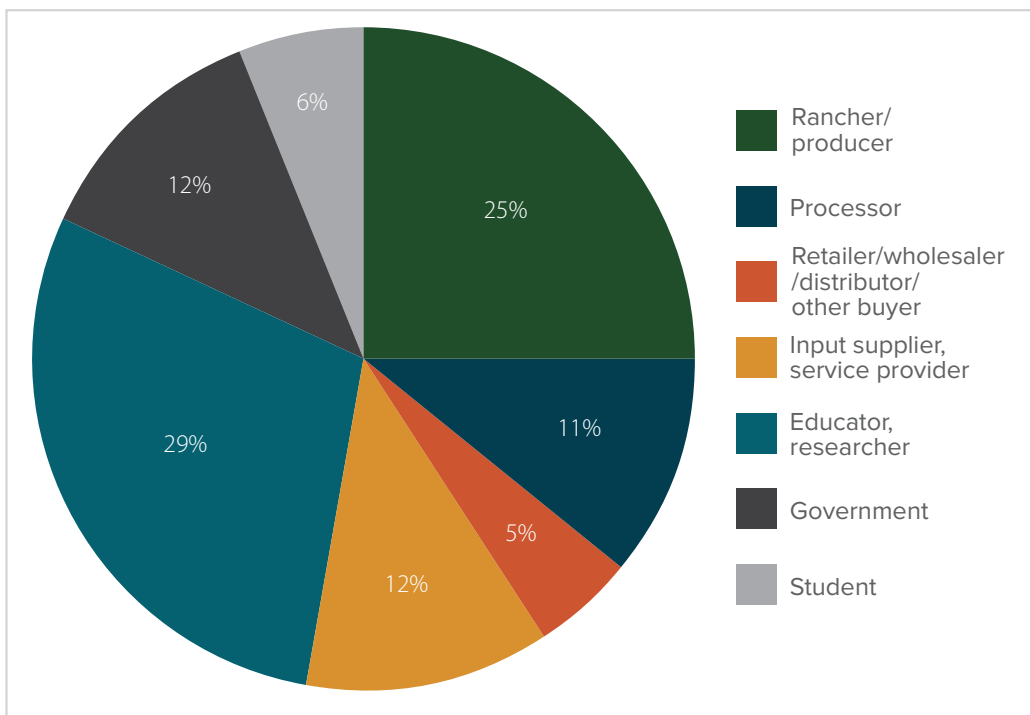


Figure 1: ILF/MMS attendees' role in the livestock/meat industry.



BARRIERS AND LEARNING

Survey participants were asked to indicate the top three barriers to advancing their meat-related work (**Figure 2**). Responses are presented for all respondents, and then for ranchers and producers as a group. Nearly half of the ranchers/producers respondents noted challenges with developing pricing strategies that enhance business profitability and accessing adequate capital to expand their operations.

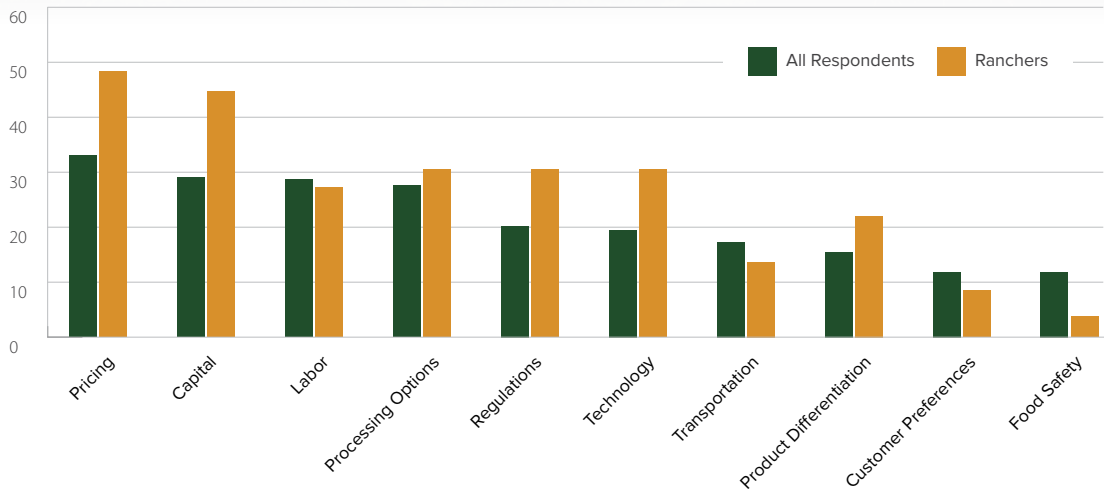


Figure 2: Comparison of all respondents' and ranchers/producers' identification of top three barriers to advancing their meat-related work.

In the post-survey, participants were asked to indicate if they learned something new regarding the barriers listed in the pre-survey (**Figure 3**). Seventy percent of the ranchers learned something new regarding developing pricing strategies that enhance their business profitability, and 57% said they had learned new information about the regulatory environment for meat sales.

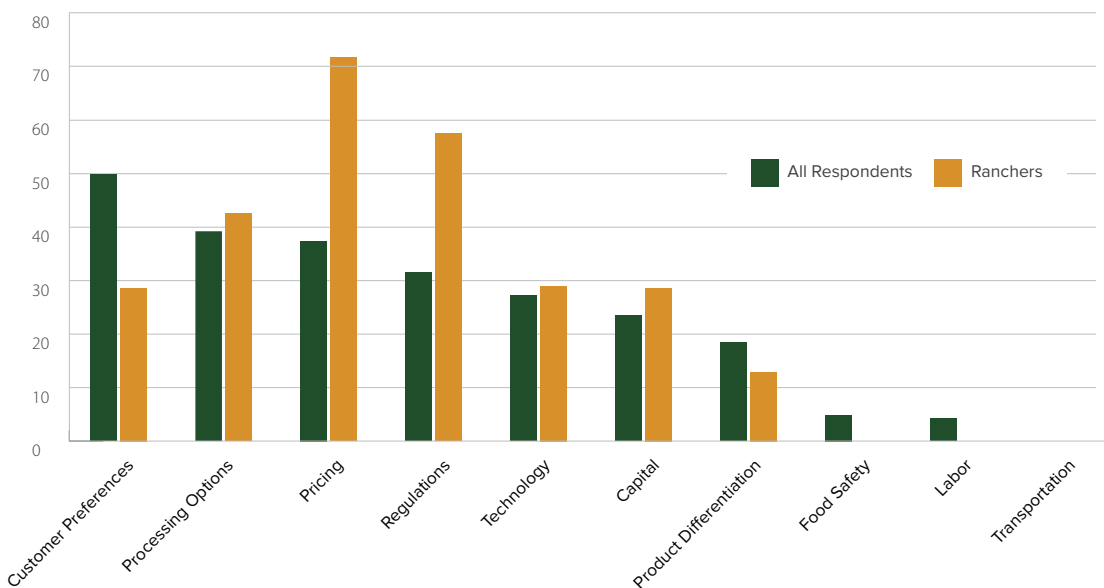


Figure 3: Comparison of all respondents' and ranchers/producers' knowledge acquired during the ILF/MMS event.



CONSTRAINTS AND INFORMATION SOURCES

Overall, the event helped participants gain knowledge about the constraints they had identified prior to attending. For example, processors indicated that they had 3 barriers addressed that they had identified, while ranchers and educators/researchers gained information on more than two of their constraints. Retailers and other buyers, in addition to input suppliers and service providers, had fewer than 2 barriers to business expansion addressed by the event (**see table below**).

	Ave Number of Barriers Addressed by Conference	Understanding Customer Tastes & Preferences	Information on Product Differentiation	Processing Options	Regulations around Meat Sales	Food Safety	Pricing for Profitability	Labor	Improving Technology	Accessing Capital
Ranchers	2.4	11%	14%	20%	33%	0%	36%	0%	20%	22%
Processors	3.0	21%	14%	13%	17%	0%	14%	0%	20%	22%
Retailers	1.7	0%	14%	13%	0%	0%	14%	0%	0%	0%
Input Suppliers, Service Providers	2.0	32%	29%	13%	17%	50%	0%	0%	30%	22%
Educators/ Researchers	2.5	37%	29%	40%	33%	50%	36%	100%	30%	33%

Table 1: Average number of barriers addressed during the ILF/MMS event. **Notes:** 1) Although we asked about restaurant buyers and chefs, none attended the event; 2) no one who identified transportation as a barrier also acknowledged having gained any information about it, therefore these two elements were eliminated from the table above.

In the pre-survey, we asked participants to identify the sources of information that they most frequently consulted to support their meat-related work. The table below summarizes results from those who also completed the post-survey so we can assess any relationship between who participants most frequently contact for information and the connections they made at the educational event.

	Ranchers	Processors	Retailers	Restaurant Buyers	Input Suppliers, Service Providers	Educators/ Researchers	Articles, Research Publications	Commodity, Livestock Organizations	Social Media, Online Searches	Other Sources
Ranchers	37%	24%	27%	0%	40%	23%	26%	29%	27%	0%
Processors	16%	12%	18%	0%	20%	15%	15%	6%	20%	20%
Retailers	11%	6%	9%	50%	0%	4%	7%	6%	7%	0%
Restaurant Buyers	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Input Suppliers, Service Providers	11%	18%	27%	0%	20%	23%	19%	35%	27%	60%
Educators/ Researchers	26%	41%	18%	50%	20%	35%	33%	24%	20%	20%

Table 2. Information sources consulted by respondents for their meat-related work. **Note:** Row values sum to more than 100% as respondents could choose multiple information sources.

As the table above shows, 40% of rancher-respondents rely on input suppliers and service providers for their information, and 37% turn to other ranchers. Processors obtain their information from a variety of sources, while retailers look to restaurants for their business information. Input suppliers and service providers look to their peers and to commodity organizations, social media and other sources. Lastly, as expected, educators and researchers obtain their information from a wide variety of sources along the supply chain.



NEW BUSINESS ACTIVITIES

In the post-survey we asked participants to list three new business activities they planned to engage in over the next six months as a result of attending the ILF/MMS event. More than one-fifth mentioned activities related to improving or maintaining the networking that they began at the ILF/MMS event, while others indicated they wanted to offer education based on information they gained. The table below summarizes these responses, indicating a variety of actionable business activities that participants would pursue.

New Business Activity	Percent of Total Responses
Improve/maintain networking	22%
Offer new education based on ideas gained	19%
Expand/explore new markets	17%
Explore grants/funding opportunities	11%
Improve own business practices	11%
Look at new/improved processing options	7%
Use industry publications/info to stay up to date	6%
Use Cornell Meat Price Calculator	4%
Address workforce issues	2%
Address biosecurity	2%

Table 3: Percent of ILF/MMS participants planning to engage in new business activity.



TECHNICAL ASSISTANCE SUPPORT

Participants were also asked to share any additional technical assistance support that they would like provided by CSU or other partners. Responses clustered on sharing information and continuing to build networks.

OPEN-ENDED SUGGESTIONS FOR ADDITIONAL TECHNICAL ASSISTANCE SUPPORT

Continue to do what you're doing! Partnering with other land grants to collaborate to better help us.

Collaborate with small businesses involved in R & D to help meat industry.

Share resources and get the information to our collective audiences.

Aside from funding, I would like to see **in-person hands-on training** for fabrication and value additions at the amazing campus facility.

More networking opportunities within and across states.

How would a producer **find better value in marketing** their regenerative practices to the consumer?

The focused **business and financial education programing** that FFI offers would be of excellent value to ranchers and producers.

Examples of food aggregation and storage options for local food in rural areas.

Information from the animal science department on integrating livestock into solar developments.

Using Maxwell Ranch for teaching and research.

Direct links to ranchers, animal protein operations, and processors to connect and implement CO animal proteins into institutional markets.

Inventory software or programs that are cheaper and helpful to new/small scale farms.

Information on the CSU website listing resources and support available to producers in the state relating to topics covered in the summit breakouts.

Grant writing, TA on grants, design of processing centers.

BUILDING CONNECTIONS

In addition to knowledge gained, one of the event’s goals was to help stakeholders build connections (**Table 4**). Eight ranchers/producers responded to the pre and post-surveys indicating they made 102 new meat supply chain connections, primarily with other ranchers. Interestingly, educators and researchers made the greatest number of new meat supply chain connections, followed by ranchers and then by input suppliers and service providers. The table below summarizes new connections acquired, while the charts that follow look at how those with different levels of engagement prior to the event, leveraged the event to increase their overall connectivity to different meat supply chain actors in the months following.

		Ranchers Processors	Processors	Retailers	Restaurants	Input Suppliers, Service Providers	Educators, Researchers
Ranchers (n=8)	Total	30	11	10	21	9	21
	Average	3.8	2.8	3.3	5.3	3.0	3.5
Processor (n=5)	Total	16	10	7	0	4	15
	Average	5.3	5.0	7.0	-	2.0	3.0
Retailers (n=3)	Total	7	5	5	3	3	12
	Average	3.5	2.5	5.0	3.0	3.0	4.0
Input suppliers/ service providers (n=8)	Total	26	28	6	0	1	27
	Average	5.2	4.7	3.0	-	1.0	3.9
Educator/ researcher (n=14)	Total	30	21	10	3	13	36
	Average	3.5	3.7	1.7	3.0	2.2	3.7

Table 4. Number of new meat supply chain connections by role in the livestock/meat industry.



POST-SUMMIT RANCHER & PROCESSOR ENGAGEMENT

The following charts look at the level of engagement that certain supply chain stakeholders had before the event, based on how often they connected with other supply chain actors at intervals of: 1) more than one time per month; 2) 5-10 times per year; 3) less than 5 times per year and 4) no interaction at all.

Rancher Engagement Post-Conference

New connections made to:

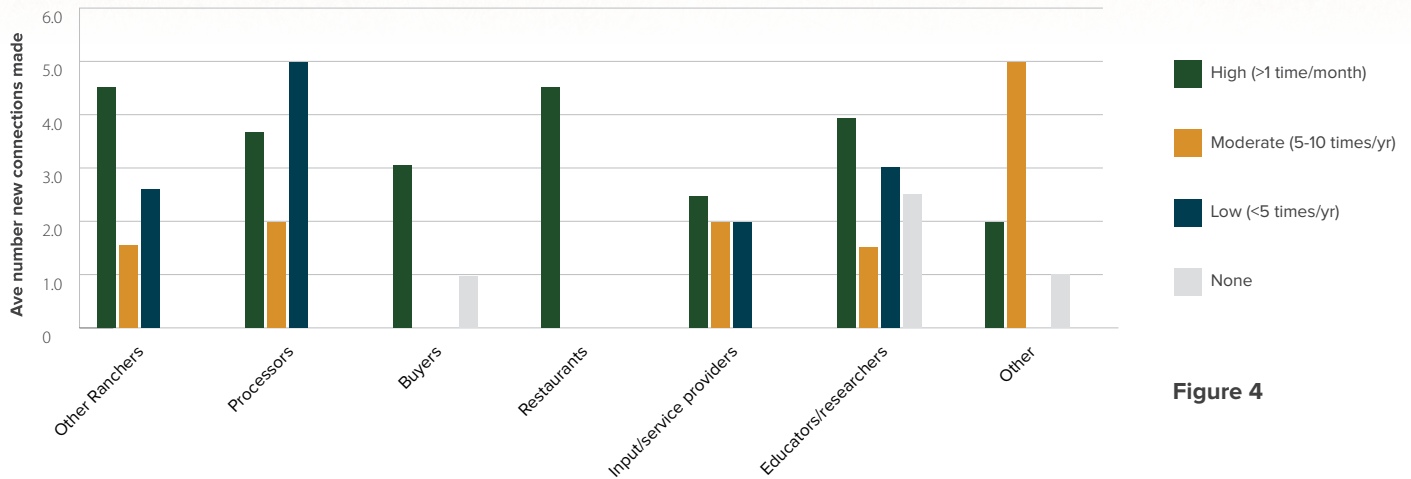


Figure 4

The above chart shows that ranchers with different levels of engagement in the supply chain, pre-event, made significant connections with new stakeholders, especially among those who came to the event with a high level of connectivity (more than one time per month). Those individuals generally made between 3 and 5 new connections, on average, with other ranchers, processors, buyers, restaurants and educators/researchers. Those with moderate connectivity before the event made fewer new connections overall, but those with low connectivity engaged with other ranchers, new processors, service providers and educators/researchers. Those with no pre-event connections met some new supply chain actors with whom they intend to connect in the coming months.

Processor Engagement Post-Conference

New connections made to:

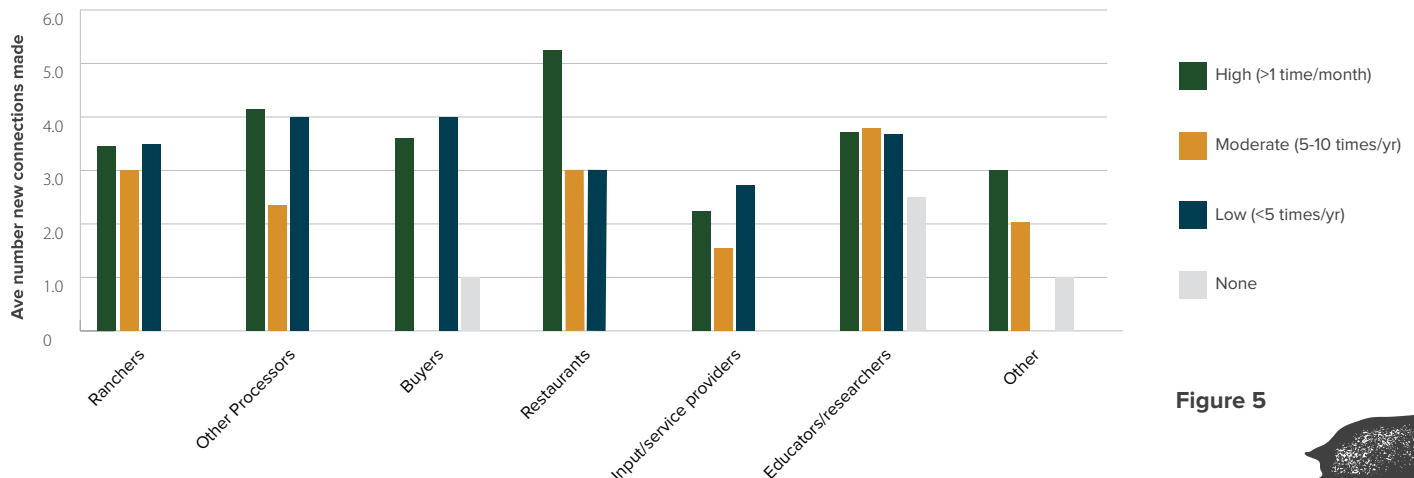


Figure 5



POST-SUMMIT BUYER ENGAGEMENT

Processors in the high engagement category gained a variety of new connections at the conference, including with ranchers, other processors, restaurants, and educators/researchers. Those with low pre-event connectivity (that is interactions of fewer than 5 times per year) made significant new connections to build on in the coming months.

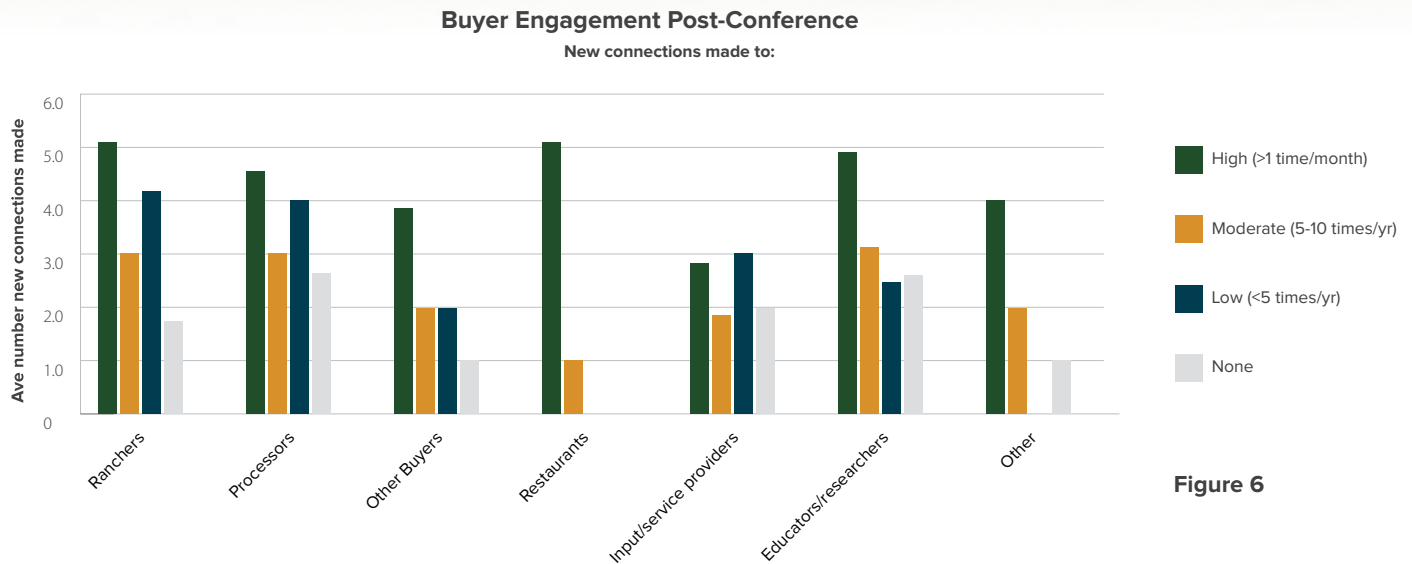


Figure 6



Lastly, buyers (retail and wholesale) made significant new connections across all stakeholder groups except input and service providers. Even those who reported low to no pre-event interaction with supply chain actors connected with ranchers and processors.



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CONCLUSION AND NEXT STEPS

The success of the International Livestock Forum and Mountain Meat Summit is part of a broader effort stemming from a three-year grant from the USDA's Western Region Sustainable Agriculture Research and Education program that also includes:

- Developing a tool to help meat producers more accurately use their costs of production to ensure their pricing will help them generate profits across different markets.
- Partnering with higher-ed technical assistance providers to offer an 8-week, online Western Meat School, which helps farmers, ranchers, butchers, and others learn the essentials for direct marketing niche meat products.

This adds to the list of existing resources found across CSU Extension, including from the Food Systems Institute and the Agricultural Business Management team, as well as the Extension county specialists and academic faculty across campus who have dedicated their attention and research into helping improve value chains for stakeholders across the meat industry.

The organizing team for ILF/MMS will continue to collaborate with the National Meat Steering Committee (meatsummits.com) and will support the next Mountain Meat Summit to be held in Montana in May of 2024.

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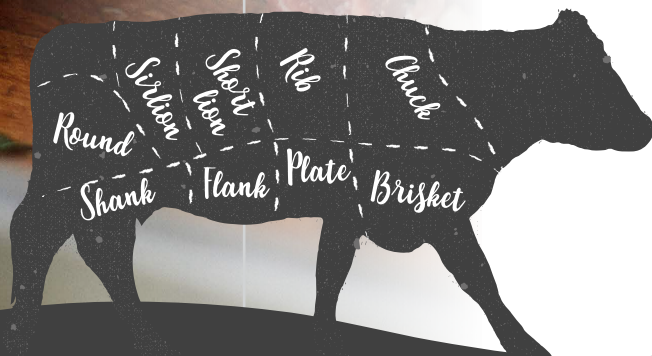


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