# UNDERSTANDING THE DEMAND FOR LOCAL MEAT IN THE GRAND RAPIDS REGION OF MICHIGAN

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MICHIGAN STATE UNIVERSITY
Center for Regional Food Systems

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# INTRODUCTION

The Michigan State University Center for Regional Food Systems livestock work group has, for the past five years, been looking at and documenting trends in and challenges to local and regional meat value chains in Michigan. The work group is made up of faculty and staff from MSU CRFS, MSU Extension, MSU Product Center, MSU Center for Economic Analysis, and MSU departments including Animal Science, Crop and Soils, and Veterinary Medicine. From early in its creation, the work group engaged meat value chain stakeholders from across the state to identify challenges and opportunities that were faced in selling Michigan meats to local markets (Barry & Pirog, 2013).[1] The combination of stakeholder input and a cross-disciplinary research team helped identify areas that needed further research specific to Michigan. These include better understanding of:

- The capacity of the producers and processing industries
- The demand for local meat
- The bottlenecks in the meat value chain hindering supply

Through United States Department of Agriculture funding (AFRI award number 2014-68006-21870) and market intermediary assistance, research was conducted to begin to comprehend the capacity to produce and the demand for local meats. This paper strives to look at market trends for local meats and provides some specific data on the market—consumer demand, pricing and supply in the Grand Rapids metro region.

This paper presents an assessment of Grand Rapids, including both a study of demographic data and an outline of the methodology used to assess the potential for an expanded local meat industry in the region. Both red meat and poultry are considered. The last section concludes and discusses that the Grand Rapids region has the potential to grow its local meat industry if increased efficiency in producers and distributors using processing capacity is achieved.

1 Barry, J. & Pirog, R. *Supplying Local and Regional Markets: Challenges and Solutions for the Michigan-Based Meat and Livestock Value Chains,* Michigan State University Center for Regional Food Systems, June 2013.

## Local Meat is Trending

Local meat sourcing has been identified as a growing culinary trend for a number of years (Torres et al, 2015; National Restaurant Association 2010-2015).[2,3,4,5,6,7,8] A survey of chefs conducted by the National Restaurant Association every year from 2010 to 2015 showed that they forecast locally sourced meats as the No. 1 trend for restaurants. The forecast for 2017 (National Restaurant Association 2016)[9] featured hyper-local sourcing as the No. 1 trend, but locally sourced meat and seafood remained among the top six trends. In addition to these studies, Torres et al. (2015) reviewed an additional 18 studies and concluded that consumers are seeking to source local meats and are willing to pay higher prices. One estimate in 2011 suggested that 60 percent of consumers are trying to buy local food (Brand Spark International and Better Homes and Gardens study, PR Newswire, 2011).[10] A 2010 survey (Curtis et al. 2011)[11] indicated that the three major attributes consumers were looking for in meat products were:

1) Products sourced from local farmers

2) Meat raised without antibiotics or hormones

3) "Natural" meat products

Local can be a quality cue for other attributes (Grunert, 2006)[12] that can be more difficult to accurately measure. An incomplete list of these attributes includes freshness, quality, safety, sustainability, and impact on the local economy. Locally produced products also create the opportunity for a consumer to feel connected to the product or the "story" that is attached to the product (ibid).

Discussions with academic staff and extension faculty in the Michigan State University Center for Regional Food Systems livestock work group highlighted three regions in Michigan where there was perceived potential demand for high-end local meats. These regions were located in and around Ann Arbor, Traverse City, and Grand Rapids. This study analyzes the demand for local meats in the greater Grand Rapids region. The primary focus is on the consumer, although the supply chain also is considered.

2 Torres, H., Barry, J., & Pirog, R. *Before We Seek Change is There a Demand for Local Meats?* A Review from 19 Reports from Across the Nation. Michigan State University Center for Regional Food Systems, 2014.

3 National Restaurant Association (2010) What's Hot 2011 Culinary Forecast. Retrieved from: http://www.restaurant.org/Downloads/PDFs/News-Research/whats_hot_2011.pdf

4 National Restaurant Association (2011) What's Hot 2012 Culinary Forecast. Retrieved from: http://www.restaurant.org/News-Research/News/What-s-Hot-in-2012-chef-survey-shows-local-sourcin

5 National Restaurant Association (2012) What's Hot 2013 Culinary Forecast. Retrieved from: http://www.restaurant.org/Downloads/PDFs/News-Research/WhatsHotFood2013.pdf

6 National Restaurant Association (2013) What's Hot 2014 Culinary Forecast. Retrieved from: https://www.restaurant.org/Downloads/PDFs/News-Research/WhatsHot/What-s-Hot-2014.pdf

7 National Restaurant Association (2014) What's Hot 2015 Culinary Forecast. Retrieved from: http://www.restaurant.org/downloads/pdfs/news-research/whatshot2015-results.pdf

8 National Restaurant Association (2015) What's Hot 2016 Culinary Forecast. Retrieved from: http://www.restaurant.org/Pressroom/Press-Releases/Chefs-Predict-Top-Restaurant-Menu-Trends-for-2016

9 National Restaurant Association (2016) What's Hot 2017 Culinary Forecast. Retrieved from: http://www.restaurant.org/News-Research/Research/What-s-Hot

10 BrandSpark International and Better Homes and Gardens (2011) Top Consumer Trends Revealed in Third Annual BrandSpark and Better Homes and Gardens American Shopper Survey. PR Newswire, 2011. Retrieved from http://www.prnewswire.com/news-releases/top-consumer-trends-revealed-in-third-annual-brandspark-and-better-homes-and-gardens-american-shopper-study-116162934.html

11 Curtis, J., McKissick, C., & Spann, K. *Growth in the Niche Meat Sector in North Carolina*, Paper Presented at the Carolina Meat Conference, March 25-27, 2011.

12 Grunert, K.G. "Future trends and consumer lifestyles with regard to meat consumption," Meat Science, 74 (2006) 149-160.

# DEMOGRAPHICS OF THE GRAND RAPIDS REGION

After metro Detroit, the Grand Rapids area is the second-largest metropolitan region in Michigan, with a population of slightly over 1 million. Approximately 10 percent of the population of the state resides in the Grand Rapids metro region. The region includes Kent, Ottawa, Mecosta, and Barry counties; Grand Rapids is the largest city in Kent County. If other surrounding counties such as Muskegon and Newaygo are added, the population figure rises to more than 1.2 million. The population in the area is increasing faster than the state as a whole. Approximately 60 percent of the residents in the Grand Rapids metro area are residents of Kent County. Table 1 outlines some general demographic information about the city of Grand Rapids, Kent County, and, for purposes of comparison, the state of Michigan.

**Table 1: Demographic Analysis of Grand Rapids, Kent County and the State of Michigan**

| | CITY OF GRAND RAPIDS | KENT COUNTY | STATE OF MICHIGAN |
|---|---|---|---|
| **POPULATION (2014 ESTIMATE)** | 193,792 | 629,237 | 9,909,877 |
| **POPULATION UNDER 18 YEARS OLD (PERCENT)** | 24.7% | 25.1% | 22.4% |
| **POPULATION 65 YEARS AND OLDER (PERCENT)** | 11.1% | 12.2% | 15.4% |
| **MEDIAN HOUSEHOLD INCOME** | $39,227 | $51,667 | $48,411 |

*Source: U.S. Census Bureau*

The region skews towards being somewhat younger than the rest of the state. Median household income in the city is considerably lower than both the county and the state. This may be because the city's residents tend to be younger. Also, the data indicate that residents of Kent County who reside outside the city have much higher median incomes than city residents or residents of the state.

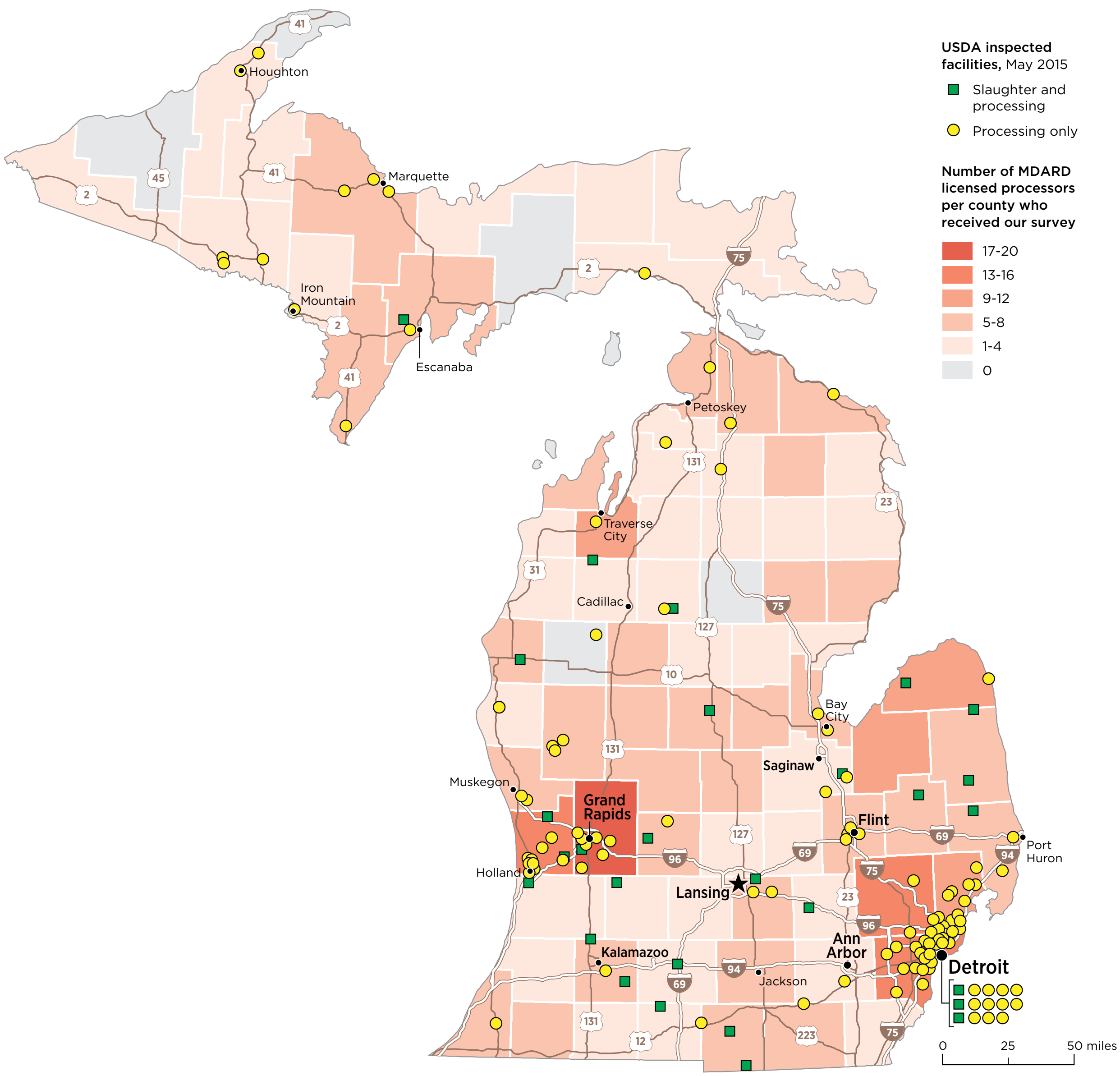
Like the U.S., Kent County is becoming more ethnically and racially diverse. According to the U.S. Census Bureau, in 2000, 8.9 percent of the residents of the county were black and 7.0 percent were Hispanic. In 2014, it was estimated that 10.4 percent were black and 10.1 percent were Hispanic.

The increasing number of high-quality restaurants in the Grand Rapids region was captured by one reviewer of the Grand Rapids restaurant scene who reported that these restaurants focus on "farm to table cuisine" and in-house butchering and charcuterie (Rupersburg, 2015).[13] This category of high-quality restaurants uses fewer traditional cuts of meats which help processors find a market for the entire carcass. The local beer industry (Grand Rapids bills itself as "Beer City USA") has aided in the interest in local foods. Grand Rapids also has two farmers' markets—the Downtown Market, which is open seven days a week year-round, and the Fulton Street Market, which is open Tuesdays, Wednesdays, Fridays and Saturdays from May through December and on Saturdays from January through April.

13 Rupersburg, N. (2015) "The 14 Best Restaurants in Grand Rapids," https://www.thrillist.com/eat/detroit/grand-rapids-dining-guide-where-to-eat-in-grand-rapids-michigan

This region is also the second-most concentrated region in terms of meat processing capacity. According to the Census Bureau County Business Patterns, there are 12 processing and slaughtering facilities in the metro Grand Rapids region. Five plants are engaged in slaughtering (except poultry), four processing carcasses, and three processing poultry. The region has one major turkey processor that accounts for most of the employment in the animal processing sector in the region. A map of slaughter and processing facilities was produced (Bielaczyc et al., 2015)[14] from the Michigan Meat Processing Capacity Survey (Schweihofer et al., 2014)[15] which further highlights the concentration of meat processing activity in Grand Rapids. (Figure 1)

## Figure 1: Slaughter and Processing Facilities in Michigan




14 Bielaczyc, N., Schweihofer, J., Miller, S., & Pirog, R. (2015) Red Meat Survey – A Visual Guide to Responses to Michigan Meat Processing Capacity Survey 2014. Michigan Meat Processing Infographic Report. MSU Center for Regional Food Systems, East Lansing, MI. Retrieved from http://foodsystems.msu.edu/resources/michigan_meat_processing_infographic

15 Schweihofer, J., Wells, S., Miller, S., & Pirog, R. (Schweihofer et al.). *Michigan Meat Processing Capacity Assessment Final Report,* Michigan State University Extension and the Center for Regional Food Systems, 2014. http://foodsystems.msu.edu/resources/mi-meat-processing-report

# BETTER UNDERSTANDING THE MEAT MARKET IN THE GRAND RAPIDS REGION OF MICHIGAN

## Methodology

Information was gathered in two ways. First, an assessment of the market trends in the meat industry was carried out via an analysis of the literature. Reports from the market research firm Mintel were particularly important for this part of the research. Second, several meat market participants in the Grand Rapids region were interviewed. The questionnaire is included as an appendix.

Those interviewed represent a cross section of the local meat supply chain. They included a farmer who produces for the local market, two processors, a distributor, a manager of a food hub, a chef, and a dedicated specialty meat retailer. Some of these market participants have been in business for decades, others for only a few years. While the number of those interviewed is relatively small, it should be noted that a dedicated local meat system still is developing, and numbers involved in the sale of meat across the value chain are not large. There was consistency in responses to the questions asked in the survey with a few exceptions. The main exception was that there was a difference in the interviewee responses regarding barriers to the growth of a local meat system. The responses of those interviewed are included in the following analysis.

## Findings

### Consumer Demand and Influences

From a national perspective, the red meat sector is facing some challenges. Due to drought, high feed prices and increased demand from other countries, the price of red meat has risen, especially when compared to stagnant incomes. This has reduced the demand for red meat with 40 percent of those surveyed indicating they are eating less red meat (Mintel Packaged Red Meat, 2015).[16] The demand may decrease further because of news with respect to health effects of red meat in general, and in particular the consumption of processed meat being related to an increased risk of cancer (O'Connor, 2015).[17] The shift in consumption as a result of a reduced demand for red meat has led to an increase in poultry purchases as consumers have substituted less expensive chicken—and to a lesser extent turkey—for more expensive beef and pork (Mintel Poultry, 2014).[18]

The Avian Influenza outbreak in 2015 in other parts of the country did not impact the Grand Rapids area; no cases were recorded in that area. Many turkeys in other parts of the country had to be destroyed to stop the outbreak. This resulted in an increased demand for turkeys raised and processed in West Michigan. This increased demand also increased the price of turkeys. Prices are likely to remain high until flocks in other states are rebuilt.

As the price of feed returns to more-average prices, the returns to beef, pork, and lamb production will increase. This, in turn, will put downward pressure on prices as supplies of beef, pork, and lamb become more abundant. There is some uncertainty as to whether demand will return to the levels experienced prior to recent publications raising health concerns in processed red meat, and other factors may continue to adversely impact the demand for some types of meat. While lamb, goat, and game meats such as bison and venison have potential to expand their market share—especially as part of a local meat system, due to an increased interest in alternatives to traditional meat products—they still only account for 3 percent of meat sales (Mintel Packaged Red Meat, 2015). Pork and beef are likely to remain the dominant sources of red meat.

Our participants surveyed in Grand Rapids indicated consumers of beef were most interested in products that are all-natural, have no additives or preservatives, and are hormone- and antibiotic-

16 Mintel. Packaged Red Meat US. Chicago: Mintel, February 2015.
17 O'Connor, A. "Meat is Linked to Higher Cancer Risk, W.H.O. Report Finds," *The New York Times,* October 26, 2015.
18 Mintel. Poultry US. Chicago: Mintel, November 2014.

free. Similar indications were demonstrated in the literature highlighting market research studies. Consumers of pork were interested in the same product characteristics (Mintel Packaged Red Meat, 2015 p.34,36). Women and younger consumers also tended to be the most interested in products with these "natural," "no additives or preservatives" and "hormone- and antibiotic-free" characteristics (Mintel Packaged Red Meat, 2015). While less important than how the animal was raised and processed, local-farm-sourced meat products are also an important attribute for some consumers (Mintel Packaged Red Meat, 2015). Those interviewed in the Grand Rapids area agreed with these findings and suggested Grand Rapids followed a similar pattern in demand.

Ethnicity also plays a role in meat purchases. White and African-American communities tend to buy similar products, but data shows the Hispanic population tends to eat more pork, lamb, and other types of meat (Mintel Package Red Meat, 2015). Hispanic populations also appear to be more likely to purchase organic or free-range poultry, buy farm-sourced poultry (Mintel Poultry, 2014), and buy prepared meat products from a food truck (Mintel Packaged Red Meat, 2015).

Two areas of increasing interest for consumers are knowing the origins of meat and how the animal was raised (Mintel Packaged Red Meat, 2015; Mintel Poultry, 2014). Data shows that for poultry consumers, despite it being illegal to use hormones to produce poultry, products with no artificial ingredients and that are antibiotic- and hormone-free are of particular interest (Mintel Poultry, 2014). These product attributes also were mentioned several times by those interviewed. A local meat system may be better equipped to address these concerns because the volumes handled are smaller, making it easier to preserve the identity of the farm and processing facility, and product claims could conceivably be easier to verify. Also, some consumers feel more connected to a local producer or processor. These factors could be used to enhance consumer confidence that the animal was raised and processed in a manner consistent with the consumer's values (Curtis, McKissick and Spann, 2011), although there is no guarantee this is actually the case. The source of the meat and the way the animal was raised play a role in the locavore movement which is a major trend throughout the food system (Mintel Packaged Red Meat, 2015).

A well-designed local supply chain has the potential to deliver fresher, higher quality meat products. Local production has been correlated to higher quality attributes such as juiciness, flavor, and overall palatability in blind taste tests that compared locally produced meats to grocery store meats (Maynard, Burdine and Meyer, 2003).[19] Several respondents in our Grand Rapids study reported that meat quality is critical, and meat taste remains important in the Grand Rapids region.

One issue is to determine what is "local." The term "local" is, to a great extent, in the eye of the consumer and is not well-defined. One study that gave consumers a choice determined 38 percent of those surveyed considered local as food coming from a region that is within 25 miles or less; another 28 percent considered food from a region within 100 miles as local; and 26 percent considered food within the state as local. Only 7 percent considered products grown within the region as local (Pirog and Rasmussen, 2008).[20]

Value chain participants from the Grand Rapids region surveyed in this study encountered the same issue. The consensus was that "local" meant different things to different consumers; however, several respondents believed consumers felt that anything produced in Michigan would be considered local. Others thought consumers would consider anything produced in West Michigan as local. It is suggested by the authors that to preserve consumer sovereignty, transparency disclosing the location of production and processing is necessary.

Those interviewed provided reasons some consumers support local meat sourcing. Some mentioned consumers believe buying local food supports the local community and improves the local economy. Some believe they have more options and choices when purchasing local meat. Some consumers want to direct their spending toward firms that share their values, and they express that by purchasing meat locally. Some market participants consider locally produced meat to be better, of higher quality, and safer.

19 Maynard, L.J., Burdine, K.H., & Meyer, A.L. "Markey Potential for Locally Produced Meat Products," *Journal of Food Distribution Research,* 34(2), (July 2003) 26-37.

20 Pirog, R., & Rasmussen, R. *Food, Fuel, and the Future: Consumer Perceptions of Local Food, Food Safety and Climate Change in the Context of Rising Prices.* Iowa State University Leopold Center for Sustainable Agriculture, September 2008.

### Supplier Pricing

Pricing of locally produced meat products is not well understood and is difficult to research, based on the need for collecting proprietary information from many small businesses and the limited number of comparable businesses that can share their pricing information, as has been attempted in Michigan previously. A key question that a market participant in a local meat system needs to answer is "What is the potential price premium for locally produced meat?" One typical method used to measure this is through surveys of potential consumers. One study indicated that most consumers were willing to pay 20 percent more for ground beef, steak, and sausage, and more than a third of respondents were willing to pay 50 percent more for locally produced chicken (Maynard, Burdinge and Meyer, 2003). However, it should be noted that consumers' stated willingness to pay often does not translate to actual behavior (Gwin and Hardesty, 2008).[21]

Those interviewed in the Grand Rapids region believed the price premium that could be obtained varied from 20 to 100 percent, with the average being closer to 20 percent. The higher potential price point was thought to be attainable when the product included additional attributes beyond just local; examples of additional product attributes are value-added items such as GMO free, antibiotic free, humanely raised, and products that offer a unique experience. Interviewees considered the greater the number of additional attributes—or the more exceptional the eating experience—the greater the potential for an additional price premium.

To be successful, a local firm needs to enhance the value proposition for the consumer. The value for the consumer can be expressed in the following equation:

$$V = \frac{PB}{P}$$

In the equation V = value, PB = perceived benefit, and P = price. It is important to note the perceived benefit is determined by the consumer. There are two ways for a meat supply chain business to add value: the first is to increase the perceived benefit, the second is to reduce the price. Given the lack of economies of scale in the Grand Rapids meat system, reducing the price is unlikely to be successful. Traditional, commodity-based production systems will be more successful. To improve the value proposition for the consumer, a firm will have to offer greater perceived benefits. For a subset of consumers, marketing a product as "local" is a characteristic that enhances the benefit of the meat product. Other characteristics such as "natural" and "antibiotic free" are other ways to increase perceived benefit.

One challenge facing local supply chain partners is the wide range of product attributes desired by consumers of local meat products in the Grand Rapids region. Among the attributes consumers were interested in included where the animal came from, how it was raised and how it was slaughtered. A smaller subset of consumers was interested in organic and non-GMO products. These results are consistent with Mickelson's study (2014)[22] that suggested there was less interest in organic meat products. Some of these attributes are stackable, meaning value in the eyes of consumers could be enhanced by adding additional product attributes. Stacking product attributes could also allow a supply chain participant to obtain higher prices.

There is a wide range of price premiums that local market participants obtain above the commodity market. Price premiums in the range of 20 to 25 percent were the most commonly mentioned, but individual firms with truly specialized products were able to obtain premiums in the range of 100 percent. Given the higher cost structure of local meat systems, it should be noted it is important for market participants to measure the higher price with the higher cost of production to ensure an adequate rate of return.

The demographic data suggests smaller firms that lack the ability to capture economies of scale in meat production, processing, and distribution may have more chance to be profitable through commanding a higher price in areas of metro Grand Rapids where median household incomes are higher.

21 Gwin, L. and Hardesty, S.D. *Northern California Niche Meat Market Demand Study*, University of California Cooperative Extension Small Farm Program, March 2008.

22 Mickelson, J.M. (2014) A comparison of meat purchasing attitudes across generations. A thesis presented to California Polytechnic State University. Retrieved from: http://digitalcommons.calpoly.edu/cgi/viewcontent.cgi?article=2428&context=theses

## Supply of Meat to Meet Demand

Seasonality of production and processing tends to result in a fluctuating supply in locally produced meat products that can present challenges for marketing local meat. The climate in Michigan is well suited for spring births, which means many animals reach market weights at the same time of year. This creates periods of peak demand for processing, followed by periods of excess processing capacity when producers have fewer animals to process. This is especially true for beef and lamb. Processors tend to be nearing their processing capacity in July and August as animals sold at local fairs are slaughtered, with September-December being the busiest months for livestock harvest. Fall deer season further stretches the capacity of businesses that process wild game (Bielaczyc et al., 2015).

There are several factors contributing to the higher cost structure of a local meat system, creating barriers to the development of a local meat system. Logistics was mentioned more than once by interviewees. Managing a system with many small businesses with different demand characteristics is difficult. This difficulty is exacerbated by the seasonality of production and variations in the quality of carcasses.

Despite research from processors indicating they have surplus processing capacity in Michigan (Schweihofer et al., 2014), according to most of those interviewed in this study, the biggest barrier to the growth of a local meat system in the Grand Rapids region was the lack of processing capacity, either in the form of additional processors or an increase in the size of the existing processors. The lack of smaller-scale, federally inspected slaughtering facilities was considered by respondents as a particular shortcoming; large slaughtering facilities in the region tend to supply the commodity market. This disconnect between the available processing capacity identified by processors and the need for available processing capacity by livestock producers and meat buyers further highlights the need for better communication and addressing logistical challenges to help move meat more efficiently through the meat value chain, particularly at the processing level. The Michigan Meat network, established in 2016, has been striving to help with better communication to overcome some of the limitations of moving meat to where there is market demand. Respondents in this study indicated that a lack of qualified labor and a difficult regulatory environment were perceived to be major barriers to increased meat processing. These findings are consistent with previous analysis (Schweihofer et al., 2014; Miller, 2017).[23] One market participant who was interviewed mentioned the lack of marketing expertise as a shortcoming that restrains the growth of the local meat system. Barry et al. (2017)[24] identified opportunities for Michigan processors that might help to address some of the challenges mentioned here.

Selling meat into smaller local markets can present challenges with marketing the whole carcass. It appears in this case that finding a market for the entire carcass is not an issue in Grand Rapids. Some restaurants focus on more expensive cuts while others use less popular cuts for special dishes. Also, the increased ethnic diversity in the area suggested support in finding outlets for the entire carcass. While only mentioned by one market participant, the pet food market is another way to add value to offal and other less desirable parts of an animal.

23 Miller, S. (2017). Opportunities and barriers to growing Michigan's local food system: The case for meat processing (Technical Report 2017-001). East Lansing, MI: Michigan State University. Retrieved from http://ageconsearch.umn.edu/record/253439/files/sp2017_001.pdf.

24 Barry, J., Miller, S., & Schweihofer, J. (2017) Developing Michigan Meat Processing. Part 1: Processing and Regulation. East Lansing, MI. Michigan State University Center for Regional Food Systems. Retrieved from http://foodsystems.msu.edu/resources/developing-michigan-meat-processing-part-1-processing-and-regulation

## CONCLUSIONS

For the most part, based on a growing depth of knowledge of local food systems and the meat industry in Michigan, the Grand Rapids region appears to be well suited to support a local meat system. While most consumers are somewhat price sensitive and are mostly interested in obtaining a basic level of quality at the lowest price, there are enough consumers interested in other value-added product attributes that, combined with sufficient sales, can support a local meat system. Several people interviewed indicated that they felt there were sufficient animals grown to meet the demand of a dedicated local market in the Grand Rapids region.

In addition to collating existing data on the market for local meat, this study conducted interviews to gather information on the meat market landscape in the Grand Rapids region. Results indicate there is a comparatively strong demand for locally produced meat in this region from a subset of consumers. Furthermore, this subset of consumers is willing to pay more for locally produced meat than meat that is sold through conventional commodity markets. These buyers prefer local meat products for many reasons, including:

- Supporting the local economy and local farmers appears to be particularly important to buyers
- Perceived higher quality and healthier meat products are among other attributes associated with locally produced meat

The primary barrier to the development or expansion of a local meat system was identified, by the people interviewed in this study, as finding appropriate processing capacity; specialty slaughtering capacity may be especially limited. Studies show there is processing capacity in Michigan to meet demand, but factors may limit how this capacity is accessed (Schweihofer et al., 2014). This study indicated the regulatory environment and the shortage of workers appear to be some of the bigger issues facing the local processing industry. The authors believe ongoing work with groups such as the Michigan Meat Association and the Michigan Meat network will help address challenges with increasing the movement of local meat into markets where there is demand.

To summarize, the Grand Rapids region is well suited to develop a local meat sector, and with consumer demand, suitable pricing and adequate supply of meat products, such a system is slowly growing. However, to fully develop, addressing processing challenges is needed, as well as improved logistical support.

## APPENDIX

The questions for the interviews are listed below. Depending on the responses, individual follow-up questions were asked to obtain more information.

### Questions for the Survey

1. Supporting the local economy and local farmers appears to be particularly important to buyers

2. What do you consider "local"?

3. What do consumers find the most desirable in a meat product?

4. What cuts of meat are consumers the most interested in?

5. What is the price premium for local meat products?

6. What do you see as the barriers to having more locally produced meat available?

7. What do you think can be done to overcome these barriers?

8. What do you see as the benefits of buying local?

9. Anything I've missed?

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*CRFS envisions a thriving economy, equity, and sustainability for Michigan, the country, and the planet through food systems rooted in local regions and centered on Good Food: food that is healthy, green, fair, and affordable. Its mission is to engage the people of Michigan, the United States, and the world in applied research, education, and outreach to develop regionally integrated, sustainable food systems. CRFS joins in Michigan State University's pioneering legacy of applied research, education, and outreach by catalyzing collaboration and fostering innovation among the diverse range of people, processes, and places involved in regional food systems. Working in local, state, national, and global spheres, CRFS' projects span from farm to fork, including production, processing, distribution, policy, and access.*

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