

KANE COUNTY LIVESTOCK MARKET ASSESSMENT

New Venture Advisors
December 13, 2023



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PROJECT SCOPE



Project Initiation & Design

Kickoff with Project Team
Create and maintain project plan and timeline
Conduct preliminary interviews to inform research plan
Design research plan
Design and manage stakeholder outreach plan



Market Assessment & Market Strategy (Model)

Surveys, interviews, secondary research, case studies, capacity modeling, and subject matter expert input for:

- Production Capacity Analysis
- Demand Analysis
- Processing Capacity
- Market Access Strategies
- Capacity Model of Current System

Compile findings and review with Project Team

ADDED: Local market retail demand analysis

ADDED: Geospatial mapping of production, processing, and demand factors by category



Stakeholder Meeting

ADDED: Plan and facilitate in-person stakeholder meeting

- Summarize findings to share with stakeholders - report on surveys, interviews, secondary research, capacity model, and case studies
- Gather stakeholder input on findings and implications
- Update findings based on stakeholder input



Synthesis & Finalization

Finalize recommendations and review with Project Team

Compile final report

ADDED: Graphic design of final report

ADDED: Create executive summary and present to Ag Committee (remote)

PROJECT TIMELINE

	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR
Initiation											
Project Design & Research Plan											
Part 1: Production Capacity Analysis											
Part 2: Demand Analysis											
Part 3: Processing Capacity Analysis											
-- Ag Committee Review											
Part 4: Market Access Strategies & System Model											
Stakeholder Meeting											
Synthesis & Finalization											

RESEARCH PLAN - OVERVIEW

Research Goal: *To identify untapped market opportunities for Kane County livestock producers*

Key information Areas:

- Production Capacity
- Processing Capacity, Processing Demand, and overall Processing landscape
- Retail Demand and Analysis

Research Instruments:

- Interviews – livestock and dairy farmers, buyers, processors
- Survey – livestock and dairy farmers
- Secondary Research – Landscape of Livestock Sector; Processing Landscape; Retail Demand Analysis

PRODUCTION CAPACITY ANALYSIS:

- Agricultural Landscape

From the scope:

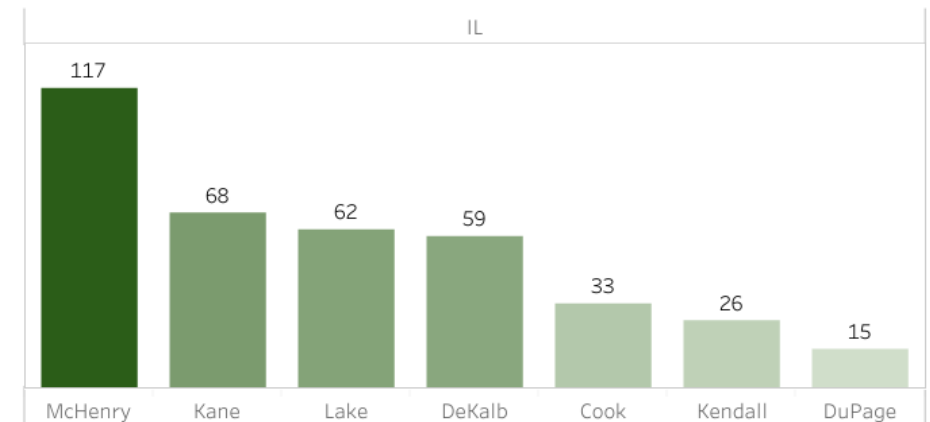
- Assess the current scale and scope of Kane County's livestock sector, including production categories, output levels, product mix/inventory, and production methods (e.g. , rotational grazing, organic, grass-fed vs. grain-fed, etc.).
- **These findings would provide producers with an area view of the livestock sector's current operations and capacity,** illuminating potential opportunities to distinguish their businesses with new or alternative products.

AGRICULTURE LANDSCAPE

- **Kane Co Foodshed:** There are **3,139 farm operations** in the seven county foodshed of Kane, Cook, DeKalb, DuPage, Kendall, Lake, and McHenry Counties
 - One in four farms are livestock operations.
- **Land Use:** Only 4% of the 932,926 acres in production are used as pastureland; 199 operations practice rotational grazing management
- **Average income per operation:** Foodshed avg. income is \$35,403, which is *significantly lower* than the state average of \$69,418
- **Organic:** 8% of farms are certified organic
- **Local Sales:** 14% of farms in the foodshed sell through local channels; McHenry County has the highest number of farms selling through local channels followed by Kane Co.

	Kane	Cook	DeKalb	DuPage	Kendall	Lake	McHenry
Farm Operations (#)	605	182	779	77	313	302	881
Livestock Farms (#)	187	80	210	22	65	126	318
Livestock Sales (\$)	27.6M	2.1M	150M	95K	7.7M	5.8M	40.4M
Farm Organically (%)	11%	2%	1%	0	8%	20%	13%
Practice rotational or manage intensive grazing (#)	41	9	26	1	17	23	82
Average Income per Farm (\$)	32,965	11,877	109,767	14,026	70,751	21,999	14,489

Farms, number selling through local marketing channels, 2017
Number of farms selling through local marketing channels



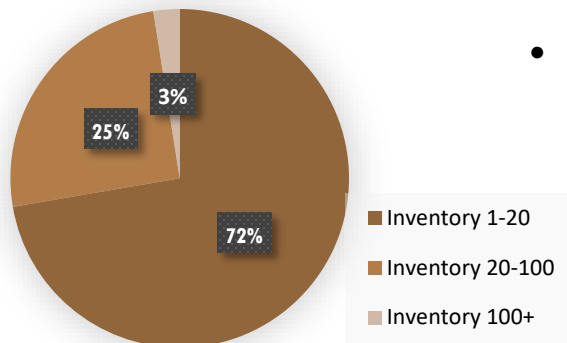
Sources: United States Department of Agriculture. (2017). *Census of Agriculture*

LIVESTOCK OPERATIONS IN THE FOODSHED

- There are **282 cattle** (beef), **115 pig**, **141 sheep**, **92 goat** (meat), **58 dairy** (cattle), and **429 poultry** operations (only 48 are chicken, broilers) in the 7-county foodshed

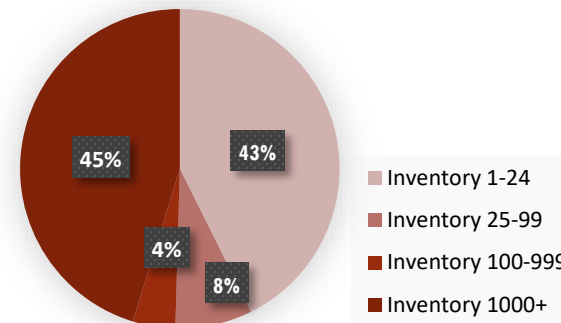
Type of Operation	Kane	Cook	DeKalb	DuPage	Kendall	Lake	McHenry
Cattle, Beef	52	13	69	1	28	9	110
Cattle, Dairy	15	2	7	0	1	1	32
Hog	9	9	49	3	11	1	33
Meat Goat	11	10	13	5	14	3	36
Sheep	25	13	23	7	10	9	54
All Poultry	70	30	68	12	34	48	167
Chicken, Broiler	10	0	5	1	8	1	23

Size of Beef Operations, 2017



- Beef operations increased** from 275 to 282- most operations are small with under 20 head in the 7-county foodshed

Size of Hog Operations, 2017



- Hog operations shrunk** from 132 to 115 – operations are split between very small (under 24 head) and large (over 1000 head) in the 7-county foodshed

PRODUCTION CAPACITY ANALYSIS:

- Farmer survey and interview findings

From the scope:

- Define the ongoing challenges faced by livestock producers in bringing their products to market
- Assess the **land and infrastructure** needs of grazing operations, the **market potential and producer interest for expanded grazing** operations, and the extent to which existing land use and zoning policies may allow or inhibit such expansion.

PRODUCER RESEARCH SUMMARY

Survey

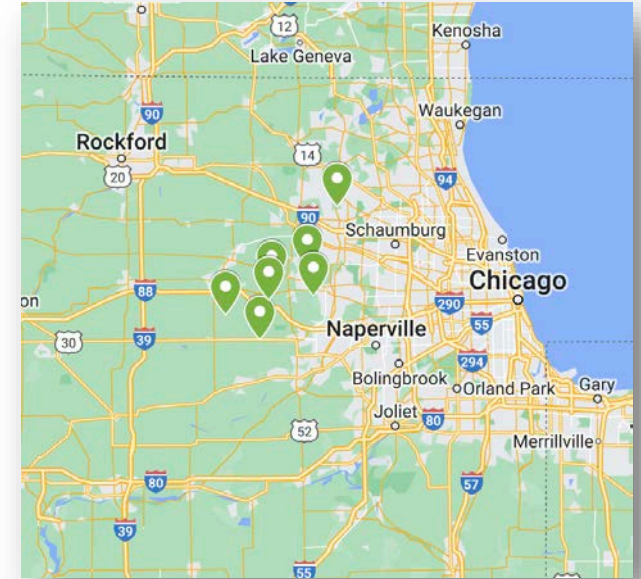
- The survey was open 10 weeks from June 30 to September 1, 2023.
- There were **16 total responses**. 2 of the farmer respondents were also interviewed.
- Most surveyed farmers were male, white, and between the ages of 55-64

"Land in close proximity to our farm for growing crops for the cows, and to naturally fertilize with liquid cow manure is critical to our existence"

Interviews

- **5 Livestock Farmer** interviews were conducted between June 29 – July 24, 2023

Interviewee Name	Farm Location	Size
Mike Peters	Creekside Cattle Far west of Kane County	900 Acres
Sarah and Andy Lenkaitis	Lenkaitis Farm Village of Campden Hills	60 Acres
Marc Bernard	Rustic Road Farm Kane County	Owns 5.5 Acres Leases 18 Acres
David Pitstick	Pitstick Pork Inc. Kane County	10,000 Acres
Cliff McConville	All Grass Farms Dundee	160 acres in Dundee 400 acres in Southern Wisconsin
Chris Gould (Emailed, only)	Gould Farm Western Kane County	



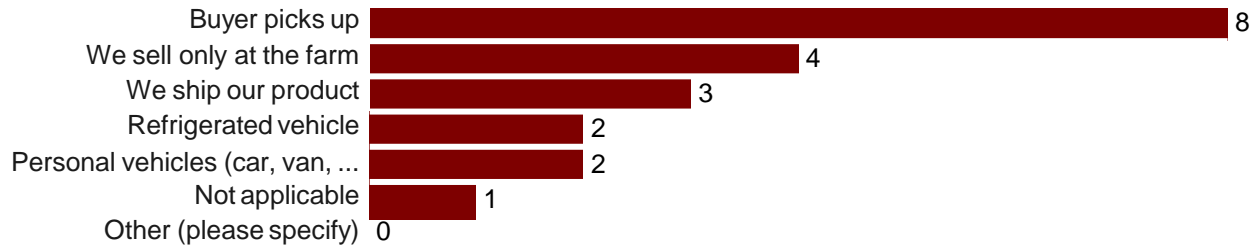
Interviewee location

"Local or regional [processing] facilities would be very helpful"

SURVEY: DISTRIBUTION, INFRASTRUCTURE, PROCESSING NEEDS

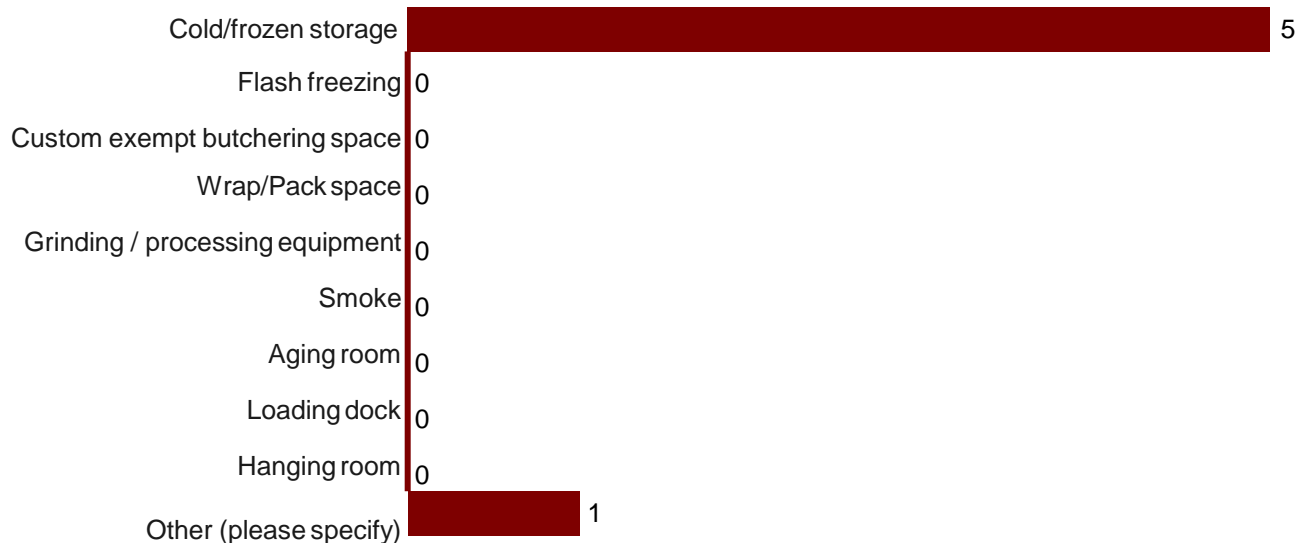
Q11 – Distribution Strategies

12 Responses



Q11 - Butchering / Processing Infrastructure

6 Responses



Distribution: Farmers employ a number of distribution strategies on their farms.

- 8 of the 12 of farmers **sell to a buyer who picks up directly from the farm.**
- 4 farmers report only selling product *at their farm*, indicating they have no other distribution strategies.

Minimal Infrastructure:

- 5 Farmers have cold/frozen storage on their farm (Q11).
- 2 farmers have refrigerated vehicles (Q12)
- The rest of the respondents report almost **no on-farm value-added processing or equipment space.**

Frequent Processing needed: Most farmers require Monthly or Quarterly slaughtering, processing, and fabrication services. (Q16-17).

Farmers travel far to access their preferred processor: Farmers primarily use a variety of processors throughout Illinois, Wisconsin, and Indiana (Q15)

INTERVIEWS: FARMER GOALS AND CHALLENGES

Farm Goals

- **Expand** farmland/acreage to consolidate animals into one place or grow production
- Increase **consumer education** about local farms
- Improve **Animal Care**
- **Self-brand** products
- **Succession planning**: Pass down farm to the next generation
- Increase **distribution**, build a food hub
- Increase **employee salaries**

Farm Challenges

- Lack of access to **sale barn** in county
- **Labor** shortages
- **Weather** unpredictability
- Must access services and materials coming from Wisconsin and Michigan due to **lack of options** in county
- Farmers have **multiple farm sites** for their animals in order to meet pasture needs of animals and production goals
- Farmers must have **off-the-farm income** and health insurance
- Hard to forecast and **predict demand**.

Practices

- Automated
 - (robotic milkers, automated manure systems, temperature-controlled building, auto-feeders)
- Conventional
- Pasture Raised
- Regenerative
- Biodynamic
- Grass Fed
- Certified Naturally Grown

Sales Outlets

- Through Processors
- Farm store onsite
- CSA
- Online sales

Customer Profile

- Individuals with disposable income
- Interested in quality
- Want to know where their meat comes from

PRODUCTION AND CAPACITY TAKEAWAYS

Grower Profile

- Small number of livestock producers in Kane Co as indicated by low survey response rate, input, and Ag. Census data
- Most raise beef, followed by pigs and sheep
 - In Kane, poultry is number two livestock product.
 - *Surveyed producers process more Hogs than any other species*
- Beef operations have increased while hog operations have shrunk in the region
- More farmers are growing their own feed due to limited availability of local feed services
- Organic certification is low

Livestock-focused Services Desired in Kane County

- Veterinarian and Nutritionist
- Added value processing for large animals
- Sale barn or auction house

Limited Land

- Only 4% of the 932,926 acres in production are used as pastureland in the region
 - Farmers in Kane County want more land for their animals: half of interviewees had their animals in multiple locations over an hour away from each other
- Farmers feel blocked in Kane Co. because of expanding suburban development and other competing interests
 - Forest Preserve and Land Conservancy may be competing with farmers for affordable land

Volatile market pricing

- Sale price is often unknown even through production, difficult to predict profit margin
- Current pricing: Dairy prices are low, Beef prices are high, Chicken prices are low
- COVID added complexity: industry pricing has shifted in the county and farmers pivoted into different product markets

PROCESSING AND SALES TAKEAWAYS

Top Barriers to Accessing Facilities

- The top farm barriers were Bottlenecks in Slaughtering (7) and Processing Facilities (6), followed by Distance to USDA Processing Facilities (6) and Availability/Cost of Labor (5)
- 4 respondents indicated they would be willing to travel **Over 120 Miles one way** to a slaughter / processor facility. 3 respondents indicated they would be willing to travel 60 Miles one way.

Processing Trends

- 3 out of 8 farmers will process more animals than last year
- 5 respondents indicated total numbers of animals processed in 2023 are likely to stay the same as last year.

Most Desired Processor Capabilities

- High Quality Packaging
- High Quality Customer Service
- USDA Inspected Slaughter and Processing
- A Variety of Cutting Options
- Convenient Location
- Private label

Additional Challenges

- Farmers may have too much OR too little meat to consistently use the same processor
- Packer capacity is limited, won't take on orders that are too small due to high demand
- Some processors can't take new customers with high volumes
- Packer capacity is limited, won't take on orders that are too small due to high demand

Processors Used by Kane Co Livestock Producers



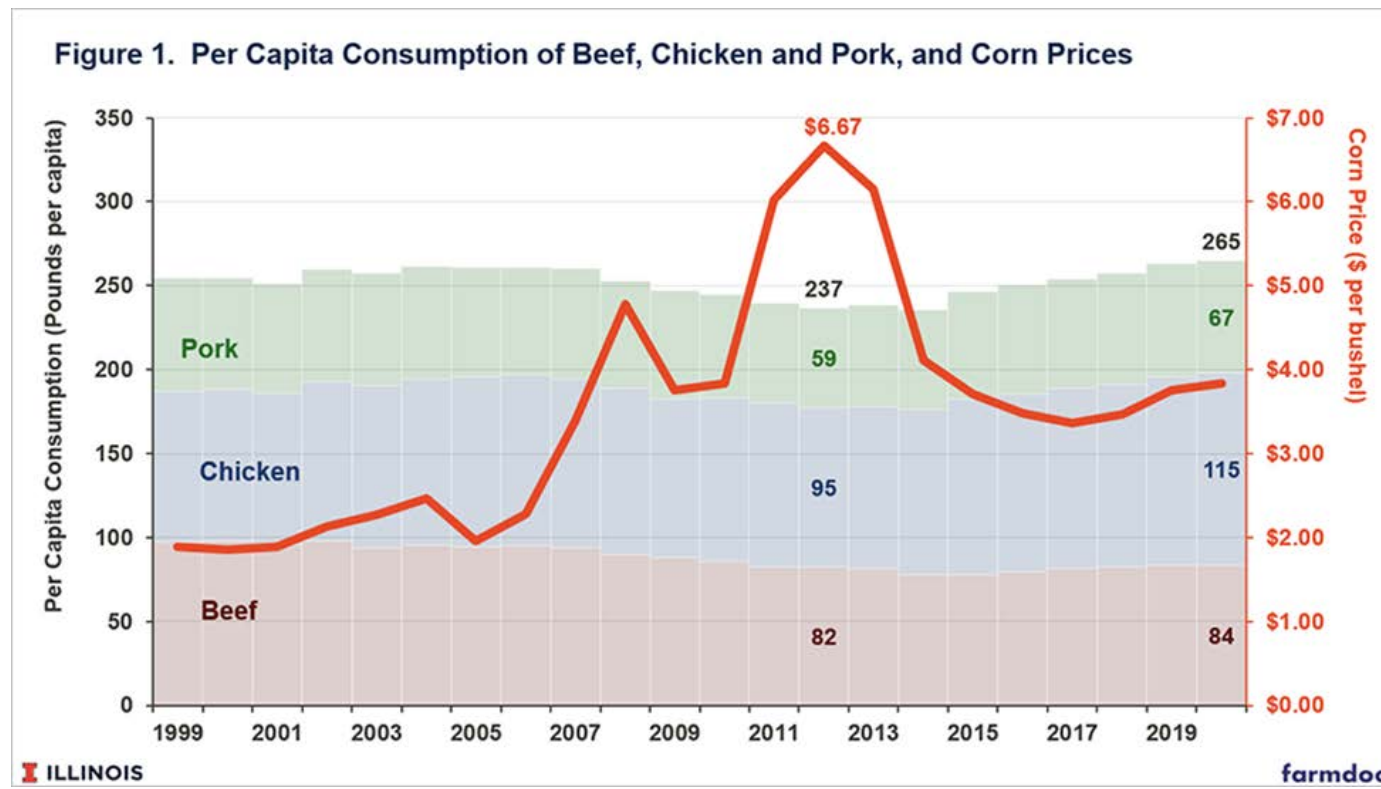
DEMAND ANALYSIS:

- Meat industry trends
- Consumer demand
- Regional Buyers

From the scope:

- Provide a complete demand analysis that **defines available market channels for local livestock products**. The analysis should identify high-demand products driven by consumer preference trends - including sales through restaurants, retailers, wholesalers, and direct-to-consumer.
- The analysis should also identify finished and value-added livestock products with consistent demand and/or higher sales margins. **These findings will likely draw on the feedback of regional buyers and secondary data sources detailing consumer preferences.**

US MEAT CONSUMPTION: HISTORIC TRENDS

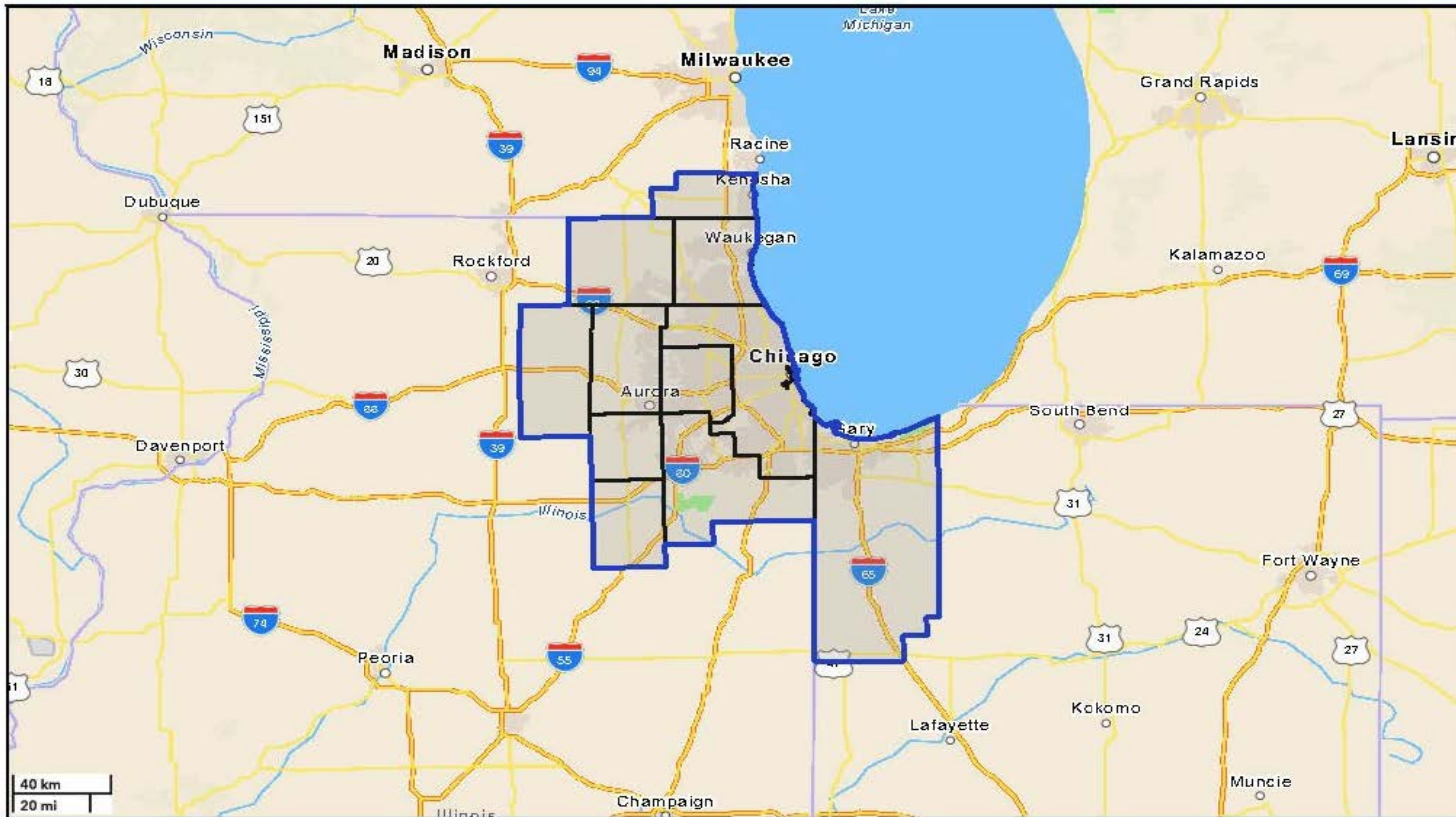


Source: Department of Agricultural and Consumer Economics, University of Illinois

Overall, U.S. meat consumption is relatively stable, temporally influenced by the economics of feeding livestock and general economic conditions.

- Economic growth in the U.S. may increase meat consumption marginally, but large increases should not be expected.
- **Meat consumption is on the rise:** In the last decade, overall meat consumption has increased from 250 lbs/person in 1999 to 264 lbs/person in 2020.
- **Beef consumption has declined** in the last decade, while poultry consumption has increased. Pork has remained stable.
- **Chicken consumption has more than doubled** in the last five decades.

MARKET AREA MEAT CONSUMPTION: TRENDS



The Chicago Market Area for meat consumption is ‘mature’ when compared to similar market areas (Houston TX) and national averages

- *Houston was chosen as a comparable US market to the Chicago MSA based on number of households and median income in addition to similar agricultural geography surrounding the urban center.*
- *Median household income is higher in the Chicago MSA compared to the Houston MSA*

Chicago has a higher percentage of households that bought/consumed organic meat

- **Likelihood that Chicago households buy organic meat is 14 times higher (114)** than the national average (100), the likelihood to buy organic meat products in Houston is 5 times higher (105) than the national average (100)
- This implicates that **Chicago is a more “mature” market in which meat niche and specialty products** (organic, game, and exotic meats) do appear to have a larger likelihood to find consumers

MEAT DEMAND IN MARKET AREA: HOUSEHOLD AND COMMERCIAL DEMAND

CONSUMER DEMAND

Total Household demand represents the highest meat spending out of all market channels, followed by restaurants (see table).

- **Household spending volume on meat is estimated to increase** by 12% over the next 5 years despite a very modest population/household growth by 0.21% between 2023 and 2028. This is in contrast to the national trend.
- **Households still spend the most for beef products** (\$440 on average annually), followed by pork (\$310 on average annually), and poultry (\$300 on average annually).
- **However, residents in the market area spend more on chicken parts (\$175)** than any other specific meat type
 - followed by ground beef (\$154)
 - and other lunchmeat (\$105)

RESTAURANT DEMAND

There are 3,262 independent restaurants in the Market Area

- While restaurants account by far for the largest number of businesses, they have the smallest average volume/demand per business.
- Restaurants that spend 25% of their food budget on meat spend an average of about \$66,381/year or about \$320M total*.
- Restaurants spending 30% of their food budget on meat are averaging \$79,657/year or about \$415M across all establishments in the 7-County market area.

Summary Annual Estimated Sales Volume (IL Counties of Market Area)	
Meat Retail	\$166,062,000
Restaurant	\$2,165,336,000
Meat Wholesale	\$1,973,409,000
Meat Related Manufacturing	\$2,012,142,000
2023 Household Demand	\$8,579,619,372
Total	\$14,896,568,372
Source: Data Axle, Inc., ESRI BIS, National Restaurant Association	

(Chart is modeled from sales data in the market area)

MEAT DEMAND IN MARKET AREA: BUYERS

11 total buyers interviewed, 5 of which were processors with meat retail outlets

Buyer interview summary



Type	Company
Buyer - Wholesale	Local Foods
Buyer - Retail	Freedom Sausage
Buyer - Retail	Ream's Meat Market
Buyer - Wholesale	Sodexo
Buyer - Institutional	U-46 School District
Buyer - Wholesale	Midwest Foods
Processor (with retail)	Country Village Meats
Processor (with retail)	Eickman's Processing Co.
Processor (with retail)	Lake Geneva Country Meats
Processor (with retail)	This Old Farm (TOFI Packing)
Processor (with retail)	Das Schlacht Haus

BUYER TAKEAWAYS

- **The meat supply chain is heavily consolidated.** There is little redundancy in the meat market, and if one or two processors went out of business, many farms could fold too, threatening a buyer's ability to source desired items.
- **Institutional buyers want products that align with existing specifications:** to enter the institutional market, new suppliers should match a product already being purchased (i.e. , 25 lb package of 3-ounce burger paddies)
- **Buyers will pay a premium for pre-processed, value-add items.** Convenience, ready to eat, pre-cooked, and pre-made all command a premium.
- **Buyers seek reliable and scalable farm suppliers** capable of consistently delivering bulk quantities of meat; for example, they need at least 100 pounds/per order.
- **Butcher shops often buy in from meat wholesalers, not local farms.** Processors with meat retail stores often utilize a meat wholesaler to stock their stores and do not buy local meat from their farm customers on the processing side.
- **"Source identified is more important than organic or grass fed"** – product should have a story.

MARKET OPPORTUNITIES

- **Farm to School:** Through state funding, the U46 school district can purchase local meat products within a specified radius. This, in addition to other federal procurement opportunities like the [PLANTS](#) grant, offers an opportunity to sell local meat in schools, where 99% of bought-in meat is frozen.
- **Predetermined sales:** Preseason contracting with buyers frees up time spent doing marketing and sales and creates more efficiencies in the supply chain by having a reliable market for the end product.
- **Value-chain coordination:** Distributors may be more willing to source from a new or local farmer if their restaurant customers have already set up the relationship and have vetted them.

"If you can get the chef and the farmer [connected], there is opportunity to get a distributor on board".

PROCESSING CAPACITY ANALYSIS

From the scope:

- The assessment should include an **inventory and capacity analysis of local processing facilities that cater to small and mid-sized livestock farms.**
- This assessment section should profile the services offered by local processors and summarize their requirements for farms needing them.
- This section of the assessment should also provide the following:
 - An overview of **regional pricing for common processing services**
 - Recommended strategies for processors and community partners to accommodate the product finishing needs of local livestock farms more effectively.

PROCESSOR LANDSCAPE

There are meat 41 processors in the region (Market Area to Indiana)

BY THE NUMBERS

Number and Location of Processors:

Processor Location	Count	Miles away (avg one way)
Tier 1 (Market Area)	20	40
Tier 2 (IL)	15	97
Tier 3 (WI, MI, IN)	6	97
Kane County	1	-

Inspection status:

USDA Inspected	29
Non-Exempt	12

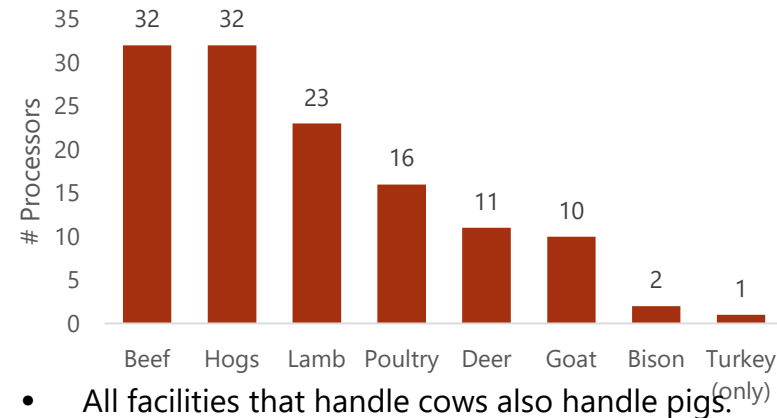
Meat slaughter:

Slaughter/Kill services*	23
Processing only	17

Most in Demand services:

- Private Labeling
- Vacuum Packaging
- Custom Cuts
- Slaughter
- Value added services

Animal Species Handled



LANDSCAPE TAKEAWAYS:

- In the market area, farmers are driving an average of 80 miles roundtrip to access processing services and as far as 194 miles outside the market area.
- Kane county lacks processors and has no slaughter facilities.
- 39% (16 out of 41) processors offer kill services
- Despite being a faster growing market than other meats, poultry has fewer processing options than Beef/Hogs

PROCESSOR INTERVIEW SUMMARY

6 Processors interviewed, all of which had slaughter services, and were identified as a preferred processor by a Kane farmer.

PROCESSOR TAKEAWAYS

- **Slots for cows and hogs are available**, and they all are taking new customers, however, slots for October and November fill up almost immediately once their book is opened for the following year
- **Seasonality in processing** needs causes demand and supply to be inconsistent (March-May is very slow) – processors are trying to find innovations for this slow period.
- **Labor availability** poses a major challenge to this industry, causing business stress and operating inconsistency.
- **Barriers to entry and facility expansion are high**, especially due to the rigorous regulatory environment.
- **Farmer customers are price-sensitive** and dislike paying a premium for extra processing or specialty packaging, but they need this to sell their products and may not understand the true costs associated with this service.

- **Quality labeling, packaging, and valued added services** is what set these processors apart and brings farmers from hundreds of miles away, safe handling of animals and high yields is also a differentiator.

“We’re used to paying for cheap food and cheap labor – we’re competing with the trades (like plumbing, electrician – they make \$100/hr) but we’re paying \$30 -\$35/hr. It’s a really hard challenge to explain the value proposition [to our customers] that “if you want to have this service, you have to pay for it”
-Processor

Interview Summary

Processor	Animals handled	Location	Miles from Kane (one way)
Country Village Meats	Beef, hogs, lamb, goat	Sublette, IL	55
Lake Geneva Country Meats	Beef, hogs, lamb, goat	Lake Geneva, WI	71
Eickman’s Processing Co.	Beef, hogs, lamb, goat, deer	Seward, IL	89
Twin Cities Pack	Poultry	Clinton, WI	92
Das Schlacht Haus	Beef, hogs, lamb, goat, bison, deer	Arthur, IL	153
This Old Farm (TOFI Packing)	Beef, hogs, lamb, goat	Colfax, IN	179

MARKET ANALYSIS SUMMARY

Regional Landscape

- Regional identity is changing as more areas suburbanize; 4% of land is in grazing operations
- Market area income is significantly lower than the state average
- There are not many mid-sized livestock producers in Kane Co
Beef operations in the region are mostly small, while hog operations are split: either very small or over 1000 head

Production

- Farmers would like to increase their sales / grow business but are seriously constrained by land access and labor
- Farmers are willing to drive 3+ hours to utilize the 'right' processor that they can trust with their products and that offers the services they want
- Desired livestock services in Kane:
 - Veterinarian and Nutritionist
 - Added value processing for large animals
 - Sale barn or auction house

Demand

- Overall meat consumption is stable but projected to decline in coming years
- Poultry is seeing the most significant growth in demand
- Buyers want local products to have a story, especially to command a higher price
- Large buyers desire convenience and pre-packaged products or value-add
- Institutional buyers have price sensitivity and require large volumes with specifications.

Processing

- The industry is consolidated with few options for processing
 - Barriers to or expanding within the industry are very high – primarily because of the regulatory environment
 - Labor constraints for small processors are the most significant challenge
- Processors differentiate by offering labeling, marketing, and high-quality value-added services
- Added value processing adds substantial costs to the end product
- There are no significant waitlists for slots

NEXT STEPS

Market Access Strategies and Market Model:

- Recommended strategies for processors and community partners to accommodate the product finishing needs of local livestock farms more effectively
- The assessment will **generate a set of market access strategies** for Kane County's small and mid-sized livestock farms, informed by the assessment data and based on proven case studies and best practice findings.
- This section of the report should highlight market access strategies that have proven effective at enabling local livestock farms to expand their reach to capture a larger share of the market demand for their products.
- The strategies should be designed with consideration for ongoing market challenges faced by Kane County's livestock operators.
 - **Includes:** Case Studies
 - **Includes:** A capacity model of the current system matching production and processing within local demand, labor, and transportation constraints.

Stakeholder Engagement/Feedback:

- Consolidate all findings and strategies to share with stakeholders for input on the implications of data and recommendations.
 - **How do we want to structure this engagement?**
 - Audience, format, content



APPENDIX

PROCESSOR PRICING SUMMARY

Costs are averaged from six interviewed processors. Value-added processing and packaging can add anywhere from \$.60 cents up to \$6/lb to the cost of processing for the farmer.

	Beef	Hogs	Lamb/Goat	Poultry
Kill Services	Kill fee: \$140/head	Kill fee: \$65/head	\$67.50/head	Chicken: \$4.85-\$6.03 / bird Turkey: \$11.51-\$15.84/ bird
Hanging weight	\$0.19/lb on hanging weight (\$121 minimum per beef) includes standard dry aging	\$0.31-.35/lb hanging weight (\$46.59 minimum per animal)	N/A	N/A
Whole Animal	Half - \$.095 per lb. Quarter - \$1 per lb. Estimated Cost for a Whole: \$800 Estimated Cost for a Half: \$450 Estimated Cost for a Quarter: \$260 (Based on 1200 lb. live weight)	\$0.93 per lb. Based on Dressed Weight Estimated Cost for a Whole: \$280 Estimated Cost for a Half: \$160 (Based on 250 lb. live weight)	Lamb: Harvest and Process \$130.00 Whole Harvest Fee \$85.00 each	N/A
Basic Butchering	Cut wrap freeze \$1.00/lb	\$1/lb	\$1.20. Minimum of \$65 for processing	\$1.17/lb Deboning: \$3.89/chicken or \$8/turkey
Packaging	White paper wrap - .80/lb Vacuum sealed \$1.30 (for some its included in butcher fee)	White paper wrap - .80/lb Vacuum sealed \$1.30	White paper \$1.50/lb Vacuum sealed \$1.85	-
Value-added: Smoked, cured, specialty meats	\$1.25/lb (Paddies) - \$6.0/lb (jerky) Specialty labels:	Ground or Sausage - \$.60-\$4/lb Cured, Smoked Hams/Bacon \$1.05-\$3.55/lb \$3.99/lb (salami) -\$5.69/lb (meatsticks)	Processed Lamb Trim over 6 lbs. \$1.25 per lb. This includes ground lamb, stew meat, etc.	-

*Labeling and Marketing
Price summary from
This Old Farm:*

- **Standard White Label:**
No additional charge
- **Private Color Label:**
Starting at \$500 for
design assistance,
\$.45/label
- **TOF logo colored
label:** \$.45 for weights
/package
- **Private White Label:**
First time approval fee
\$66.55 then
\$19.97/order

KANE CO LIVESTOCK FARMERS: PREFERRED PROCESSORS

Animal or Main Product	Location	Products	Processor Offerings	Processor Limitations
Brummel's	Rock Falls, IL	Poultry, Beef		
Bushel and Peck*	Beloit, WI	Poultry	Bone Broth	
Central IL Poultry Processing	Arthur IL	Chicken		
Country Pride Meats*	Clinton, WI	Poultry, Beef, Hogs, Lamb		
Country Village Meat	Sublette, IL			Won't allow farmer to put their name on their product/label understaffed charge a fee for processing
Dairy Farmers of America	National (Rockford)	Milk	Co-op, Pickup from Farm, Pasteurization	
Das Schalt Haus	Arthur, IL			
Eichman's*	Seward, IL	Beef, Pork, Lamb	USDA processor	Packaging and Labeling Quality, vaccum sealing/labeling quality (holes in plastic reported) Staffing challenges / Customer service Limited availability (couldn't give customer dates needed) Questions about butchering skills/getting all meat possible from production having issues with farmers promising to produce orders and canceling
Eureka Locker, Bittner's	Eureka, IL			Packaging quality Meat butchering efficiency no slaughter
Hometown Sausage Kitchen	East Troy, WI	Pork, Turkey, Beef	Value-Add Processing, cut/package	
Johnson Processing Plant	Chadwick, IL			
Jones Locker	Jacksonville, IL	Beef	Custom Exempt	Packaging Quality
Lake Geneva Country Meats	Lake Geneva, WI	Beef	Vacuum pack	Had too many customers, dropped some/not accepting new clients Wouldn't vacuum pack product for customer
Lena Maid Meats*	Lena IL			
Livestock Auctions				
Smithfield Group Seaboard Foods, JBS, Tyson ("Big Guys")	National		1 yr contract - based on supply/pricing	Can't deliver 40% to Kane and 60% to Smithfield/"big guys" because big guys will not accept partial Commercial Industry has been trying to consolidate and force them out
This Old Farm	Colfax, IN	Pigs, Beef	Custom and quality labeling: FSMA label, "pasture raised" pork; "100% grassfed". Available processing dates, roll pack machine, work with direct-to-consumer farmers, packaging, value added processing, customization	Product quality
Twin Cities Pack*	Clinton, WI	Poultry: Chicken, Turkeys		

PROCESSOR LANDSCAPE IN MARKET AREA (1/3)

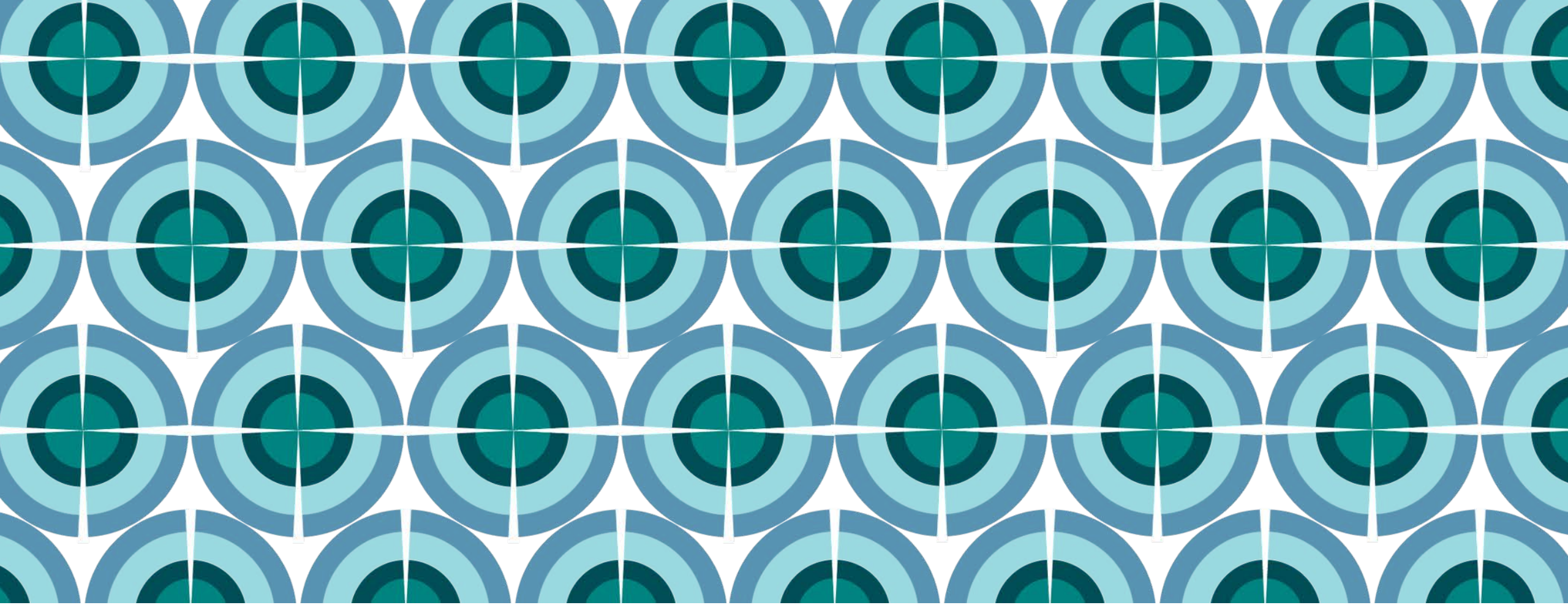
Processor Name	City	State	County	Distance to Kane Co (miles)	USDA or non exempt?	Slaughter	Animals (types)	Value-Add/ Other Services
Ream's Meat Market 130-21545	Elburn	IL	Kane	0	USDA	No	beef, pork, lamb, poultry	sausage, burger, charcuterie
Wheaton Meat Company, Inc. 130-00649	Wheaton	IL	DuPage	18	Non exempt	No	beef, pork, lamb, bison, poultry	sausage, burgers
Quality Meat Market	Carol Stream	IL	DuPage	21	Non exempt	No	beef, pork	
S & J's Lisbon Locker 130-23094	Newark	IL	Kendall	25	Non exempt	No	beef, pork, lamb, deer	
Ho Ka Turkey Farm	Waterman	IL	DeKalb	26	USDA	yes	turkey	no
Inboden's Meats, Ltd.	Dekalb	IL	DeKalb	30	Non exempt	No	beef, pork, poultry	sausages
Dreymiller and Kray, Inc. 130-00042	Hampshire	IL	Kane	33	Non exempt	No	beef, pork, poultry	smoked meat, bacon, sausage
Freedom Sausage	Earlville	IL	LaSalle	39	USDA	yes	beef, pork, lamb, goat, deer	Sausage, jerky, salami
Nea Agora Packing Company 130-00667	Chicago	IL	Cook	41	Non exempt	yes	lamb	
Heybeck's Market 130-00321	Palatine	IL	Cook	42	Non exempt	No	beef, pork, lamb, poultry	sausages, jerky
Pork King Packing, Inc	Marengo	IL	McHenry	42	USDA	No	pork	no
B.B.M. Packing Co., Inc. 130-00782	Chicago	IL	Cook	43	Non exempt	No	beef, pork, lamb, poultry	yes- sausage,
Columbus Meat Market, Inc. 130-00775	Chicago	IL	Cook	44	USDA	No	beef, pork, poultry	sausages
Paulina Market 130-11016	Chicago	IL	Cook	46	Non exempt	No	beef, pork, lamb, poultry	sausage, burger, meatballs, smoked meat
Whittingham Meats	Alsip	IL	Cook	46	USDA	No	beef, pork, lamb, poultry	sausage, burgers

PROCESSOR LANDSCAPE (2/3)

Processor Name	City	State	County	Distance to Kane Co (miles)	USDA or non exempt?	Slaughter	Animals (types)	Value-Add/ Other Services
Park Packing Company, Inc. 130-00213	Chicago	IL	Cook	48	USDA	Yes	pork	
Forza Meats 130-00507	Northbrook	IL	Cook	50	Non exempt	No	beef, pork, poultry and lamb	burgers, sausages, prepared foods
Chef's Quality Meats, Inc. 130-00701	Markham	IL	Cook	54	Non exempt	No	beef, unknown	make burger mix
Country Village Meats	Sublette	IL	Lee	55	USDA	yes	beef, pork, lamb, goat	
Olague Farms Meat Packing, Inc.	Harvard	IL	McHenry	60	USDA	yes	beef, goat, lamb	no
Meat by Linz	Calumet City	IL	Cook	61	USDA	no	beef, pork, lamb, poultry	no
T & J Meat Packing, Inc. 130-00060	Glenwood	IL	Cook	63	USDA	Unsure	beef, pork, lamb, goat, poultry	sausage, charcuterie
Lake Geneva Country Meats	Lake Geneva	WI	Walworth	71	USDA	yes	beef, pork, deer	no
Slagel Family Meats	Forrest	IL	Livingston	74	USDA	Yes	beef, pork	Yes- sausage, brat
Brummel Poultry	Rock Falls	IL	Whiteside	81	USDA	yes	poultry	no
Brummel's	Rock Falls	IL	Whiteside	81	Non exempt	yes	beef	no
Eickman's Processing, Inc	Seward	IL	Winnebago	89	USDA	yes	beef, pork, lamb, goat, deer	sausage
Hometown Sausage Kitchen	East Troy	WI	Walworth	89	USDA	no	pork, poultry	yes- sausages
Twin Cities Pack	Clinton	WI	Rock	92	USDA	yes	poultry	No
Country Pride Meats	Clinton	WI	Rock	95	USDA	yes	beef, pork, lamb, goat, bison	no
Johnson Processing Plant	Chadwick	IL	Carroll	97	USDA	yes	beef, pork, lamb	no

PROCESSOR LANDSCAPE (3/3)

Processor Name	City	State	County	Distance to Kane Co (miles)	USDA or non exempt?	Slaughter	Animals (types)	Value-Add/ Other Services
Lena Maid Meats	Lena	IL	Stephenson	111	USDA	yes	beef, pork, lamb, deer	yes- brats, sausages
Eureka Locker, Bittner's	Eureka	IL	Woodford	112	USDA	yes	beef, pork, deer	no
Das Schlacht Haus	Arthur	IL	Douglas	153	USDA	yes	beef, pork	sausage
Central IL Poultry Processing	Arthur	IL	Douglas	154	USDA	yes	Poultry	no
This Old Farm	Colfax	IN	Clinton	179	USDA	yes	beef, pork, lamb	no
Jones Locker	Jacksonville	IL	Morgan	208	USDA	yes	beef, pork, deer	yes- brats
Farmhouse Meat Co.	Carthage	IL	Hancock	236	USDA	Yes	beef, pork, lamb, goat, deer	no
Pinn-Oak Farms	Delavan	WI	Walworth	53	USDA	yes	lamb, goat	unsure
Chenoa Locker	Chenoa	IL	McLean	116	USDA	yes	beef, pork, lamb, goat, deer	yes
Arrow Farm Meats	Rock City	IL	Stephenson	78	USDA	No	beef, pork, deer	yes



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