

Report from Vermont Dairy Task Force On-Farm Processing Survey September 2006

In 1995, on-farm processing was just beginning to take hold with nine on-farm processors of dairy products in Vermont. These on-farm processors produced the following dairy products: yogurt, fluid milk and cheese. In 1995, organic milk was being processed in Vermont into fluid milk and butter beginning a new trend for the Vermont dairy industry.

On-farm dairy processing has increased dramatically since 1995. In 2005, there are 38 on-farm processors of dairy products in the state. The product mix has expanded and now the following dairy products are produced by on-farm processors: blue cheese, Gouda cheese, Colby, cheddar cheese, Italian style hard cheeses (Parmesan and Romano), organic fluid milk, organic ice cream and yogurt. The growth in on-farm processing meets a niche market for a variety of cheese styles and a growing demand for artesian cheese in major markets in the Northeast as well as milk, yogurt and ice cream. The growing demand for organic milk and dairy products has fueled the on-farm processing of organic milk in fluid, yogurt, cheese and ice cream. Dairy farmers have chosen to produce products on-farm as a means to add value to their raw milk and to acquire control over the sale and price of those products. On-farm processing and sale of dairy products has been a viable alternative for Vermont's dairy farmers.

The Vermont Dairy Task Force appointed by the Governor in April of 2005, reviewed the information on the growth of the on-farm processing sector of the dairy industry and requested a survey of on-farm processors to determine the needs and opportunities for growth of Vermont on-farm processors.

The results of this survey will be used by the Vermont Dairy Task Force to direct its goals and work plans in the future regarding on-farm processing of dairy products. The report may also be useful to other organizations in Vermont in their endeavors to assist Vermont's on-farm processors.

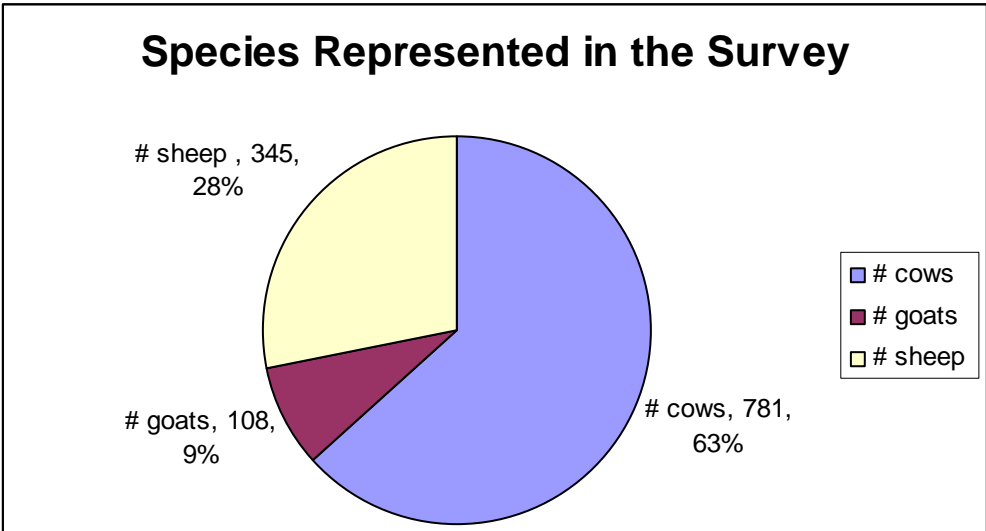
Method

The survey questions were developed for the Vermont Dairy Task Force by two UVM 2 + 2 Students as a class project under the guidance of Bob Parson, Professor UVM Extension and Diane Bothfeld, Vermont Agency of Agriculture. Students, Ransom Conant, a Dairy Task Force Member, and Seth Chapelle researched information regarding on-farm processing and what surveys had been completed in the past, developed the survey questions and reviewed their questions with on-farm processors in the state.

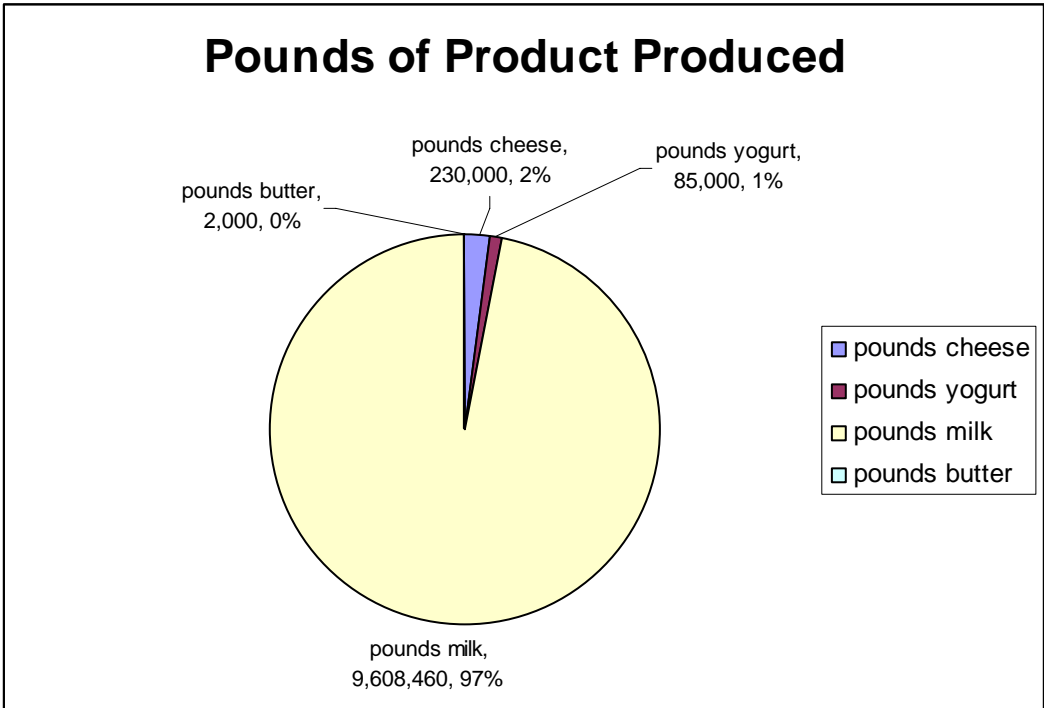
The completed survey was sent to 35 on-farm processors in Vermont and was available on the Vermont Agency of Agriculture web site. The sample included on-farm cheese, yogurt, butter, fluid milk and ice cream processors. Sixteen completed surveys were returned for a rate of 45.7%. The results were tabulated and used to generate this report. Results are available by question in Appendix 1.

Results

On-Farm Processing Information



The respondents to the survey represented over 1,000 animals and three species. The average size herd for all of the respondents' was 75 animals with the largest milking 360 cows and the smallest milking 5 cows. From the information provided, the responding participants produced over 18 million pounds of milk per year. The greatest volume of milk was over 10 million pounds of milk per year and the least volume was 45,000 pounds. Only two of the respondents indicated that they milked more than one species on their farm with the species being goats and cows. These participants milk over 50 goats and had less than 10 cows.

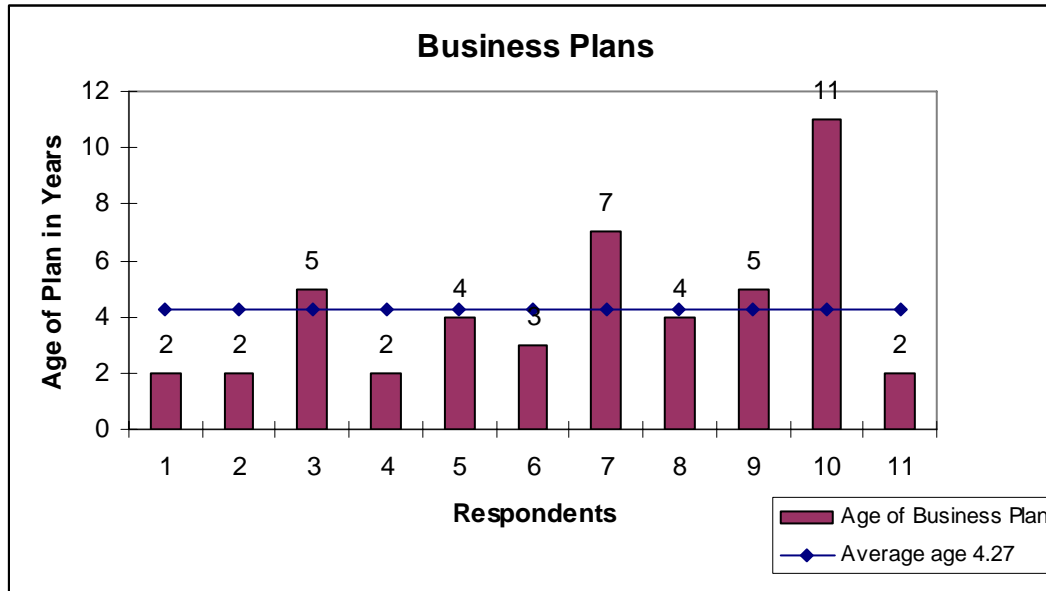


The participants produced a variety of products on their farms. These included cheese, yogurt, fluid milk and butter. Not all respondents indicated the amount produced for each product type. Eleven respondents reported making cheese with a total of 230,000 pounds produced pre year. Two respondents indicated that they produced yogurt at 85,000 pounds per year. Three respondents indicated that they produced fluid milk at 9.608 million pounds or 1.115 million gallons per year. One respondent indicated that they

produced 2,000 pound of butter per year. This shows the range in size and variety of products produced by the respondents.

The respondents on average processed dairy products an average of 2.97 days per week and employed 2.91 non-family employees. The respondents indicated that on average 2.87 family members are involved in the business.

Business Planning



The survey included questions on business planning. 75% percent of the respondents indicated that they have a business plan and the average age of that business plan was 4.27 years. Fifty percent of the respondents did not receive assistance in writing their business plans. The 25% that did receive assistance with their business plans received that assistance from Vermont Housing and Conservation Board Farm Viability program, Small Business Administration, an independent consultant and a family member. The majority of respondents did not respond to the question if having a business plan made obtaining capital easier. For those that did respond, many found that business plans were more helpful in getting grant funding than loans from commercial lenders. Several responded that they were self funded.

Obtaining Capital

The survey included questions on obtaining capital. 62.5% of the respondents felt that they did not incur capital limiting costs to meet regulatory issues. 25% of the respondents felt they had incurred capital limiting expenses and these expenses centered on the need for septic systems and engineering requirements. On average, the process to obtain a loan for the business took 2.2 months. Cross referencing this information with the question on business planning showed the following result: respondents that had business plans showed an average time to obtain a loan was 2.7 months. 31.3% of the respondents applied for an ag loan with 12.5% applying for both an ag and commercial loan. Respondents were asked for the obstacles to applying for either an commercial or agricultural loan. Five respondents cited lack of dairy experience, skepticism of viability of on-farm cheese making, and interest rates and collateral issues as obstacles to obtaining a loan.

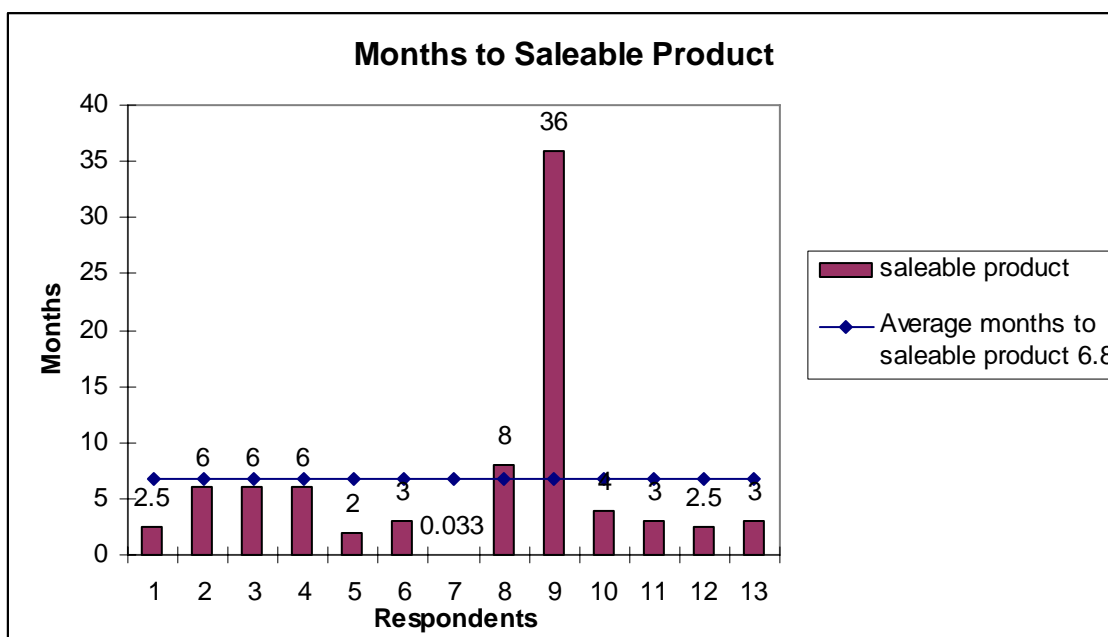
Regulations

There are many regulations that govern the processing of dairy products. The respondents indicated that for cheese State and Federal regulations have not affected the quality of their product. 81.3% of the

respondents stated that the quality of their product was not affected by regulations and felt that the state dairy inspector was very helpful, regulations helped to enhance their product and they understood that their cheese needed to be aged 60 days and that the quality was still there. 6.3% of the respondents felt that regulations did affect the quality of their product due to the fact that one of their cheeses is much better at 45 days than at 60 days of aging.

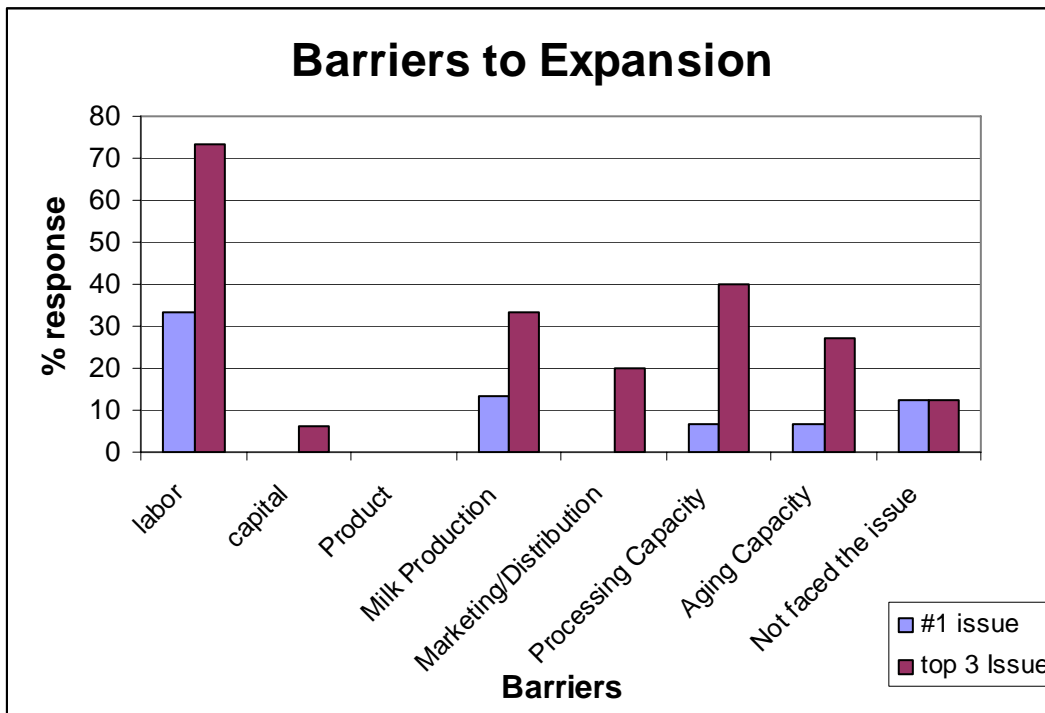
Start-up and Expansion

As on-farm processors began their businesses there is a time when demand for product does not meet the production goals of the business. Respondents on average felt it took 1.8 years for demand for their product to reach their production goals. Many felt that demand reached production goals quite quickly with a need for expansion and the facilities becoming the limiting factor in meeting demand. At the same time that demand reached production goals, respondents stated that the goal of production met the business capacity. The respondents may it clear that demand drove production to meet business capacity quite quickly and that processing capacity became a limiting factor for the business.



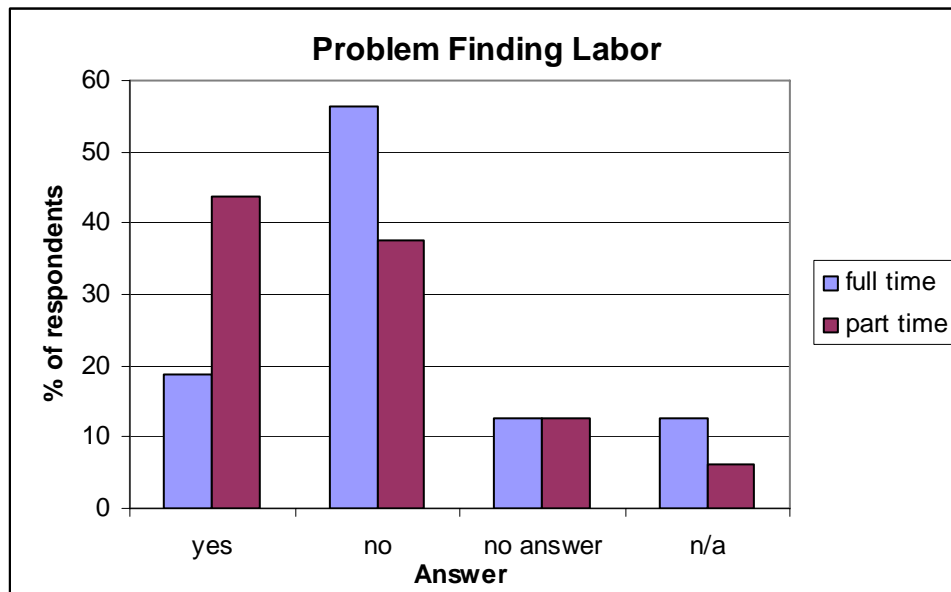
For on-farm cheese makers, the question was asked how long it took to reach a saleable product. On average the respondents took 6.8 months to produce a saleable product. 43.8% of the respondents stated that having assistance would have shortened that time frame. Respondents cited assistance from UVM Food and Nutrition Department, private consultants and experimentation on the kitchen stove as assistance that helped shorten their time to a saleable product.

As shown in the above question, demand for the product can grow quickly. Increased demand for product puts pressure on the business to expand. Respondents were asked to rank the number 1, 2 and 3 barriers to expansion of their business with 1 being the greatest barrier.



33% of the respondents ranked labor as the number one barrier to expansion of their business. 73% of the respondents ranked labor as a top three barrier to expansion. The next barrier to expansion for respondents was milk production with 13.3% ranking this as the number one barrier and 33.3% ranking milk production as a top three barrier to expansion. Processing capacity was also ranked highly as a barrier to expansion with 40% of the respondents ranking this as a top 3 barrier.

Labor



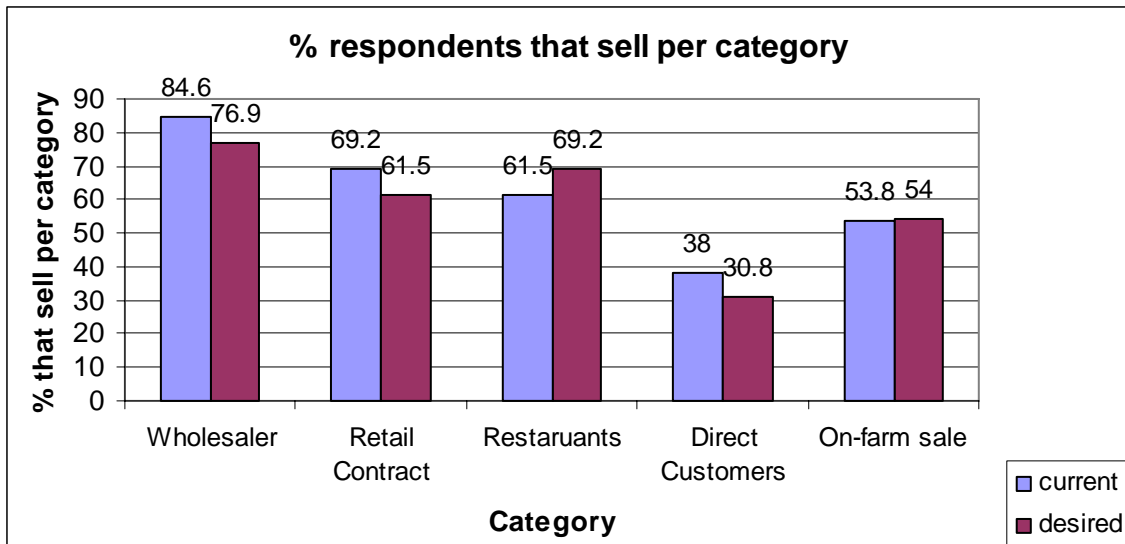
Labor is an issue for many farms and businesses in Vermont. The survey included questions on finding quality full time and part time labor. From the survey the majority of respondents were not having problems finding labor with 56.3% for full time labor and 37.5% for part-time labor. 43.8% of the respondents had trouble finding part time labor and 18.8% had trouble finding full time labor. Asked

what type of labor was hardest to find, 37.5% of the respondents stated that production labor was the hardest to find especially milking and on-farm help. 43.8% of the respondents stated that at this point in their business the cost of hiring another laborer would outweigh the benefit. Due to this factor, are on-farm processors actively seeking hired labor?

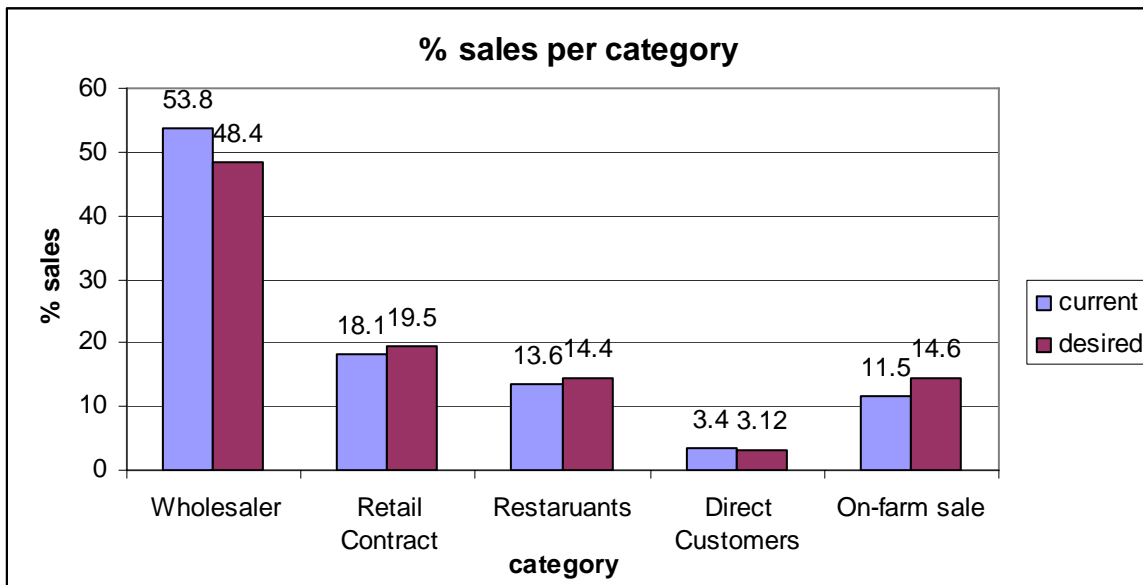
Sales

The survey asked what percentage of the farm’s milk volume was processed into product and what was marketed to a cooperative or handler. An average of 83.3% of the farm’s milk volume was processed into dairy products. On average 15.7% was sold to a co-op or handler. The remaining 0.63% was kept on the farm for other uses such as feeding young animals and family consumption.

The survey looked at how products are sold – through wholesalers, retail, restaurants, direct customer sales and on-farm sales. Respondents were asked to state how products were being currently sold by percent and then the desired method for the sale of products. The chart below shows the responses. Not every respondent answered the question fully. Only respondents that answered both the current and desired market plan were included.



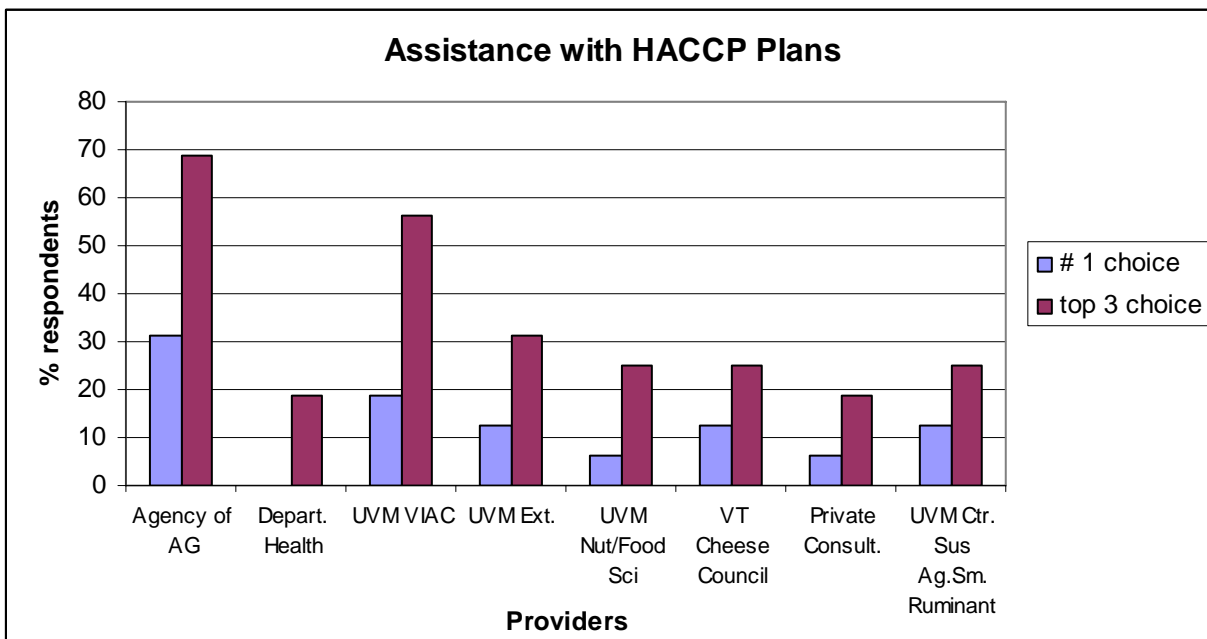
The respondents sell their product in many categories. Respondents would move away from wholesale, retail contracts and direct customers and move toward restaurants and on-farm sales. The next chart looks at the percentage of product produced on the farm as sold by category.



From this chart and survey question, currently the majority of products produced on farm are being sold through wholesale channels. The desired method of sales moves less product through wholesale and increases product moved through retail contract, restaurants and on-farm sales. One respondent felt greatest return was in on -farm sales. Another stated “We are comfortable with current % but would like more farmers market sales = higher profit level and more volume through wholesalers - less labor & hassle with large orders they make all retail accounts too small.”

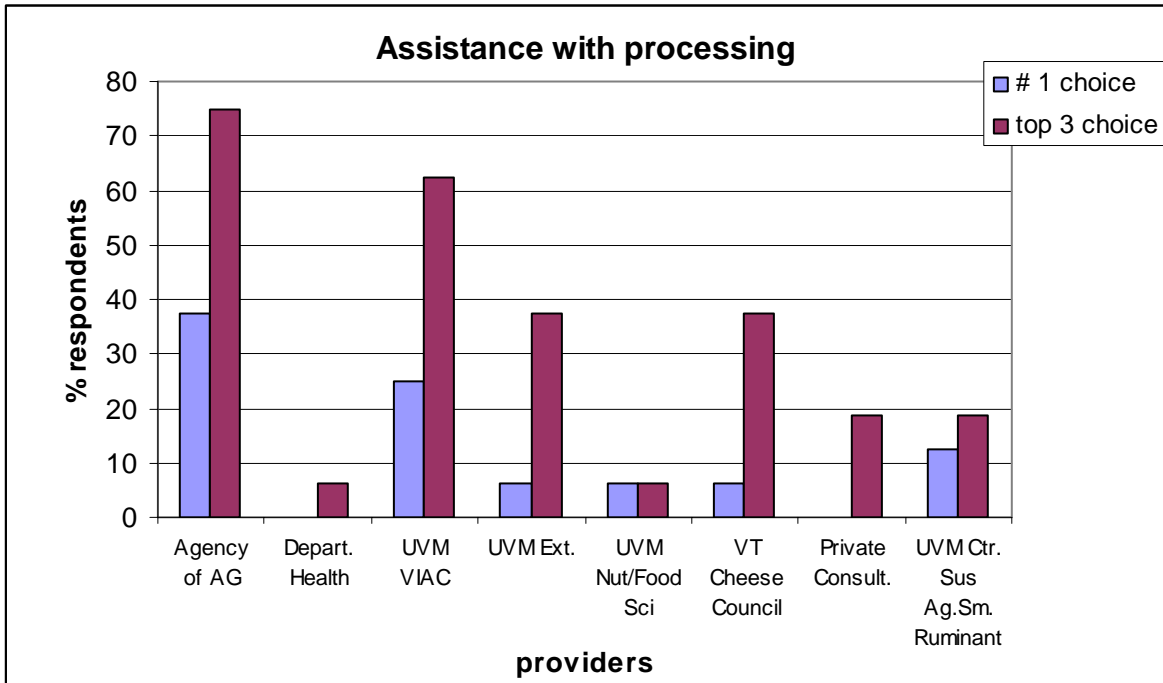
On-Farm Assistance

There are many issues facing on-farm processors. These include safety protocols (HACCP), assistance with on-farm processing and assistance with marketing and promotion of their products. A series of questions in the survey ask respondents to rank 1 to 3 who should provide assistance in the three areas with 1 being the most important.

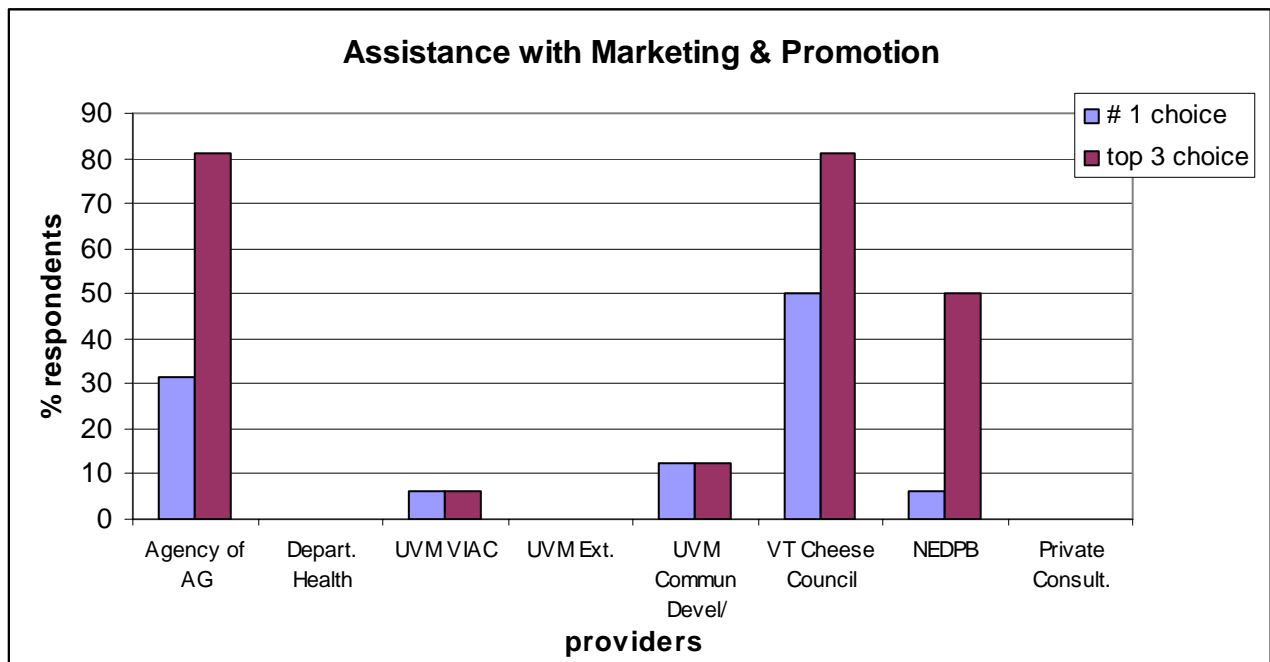


Asked who should provide assistance in developing HACCP plans for on-farm processors, 31.3% of the respondents ranked the VT Agency of Agriculture their top choice for assistance. 68.8% of the

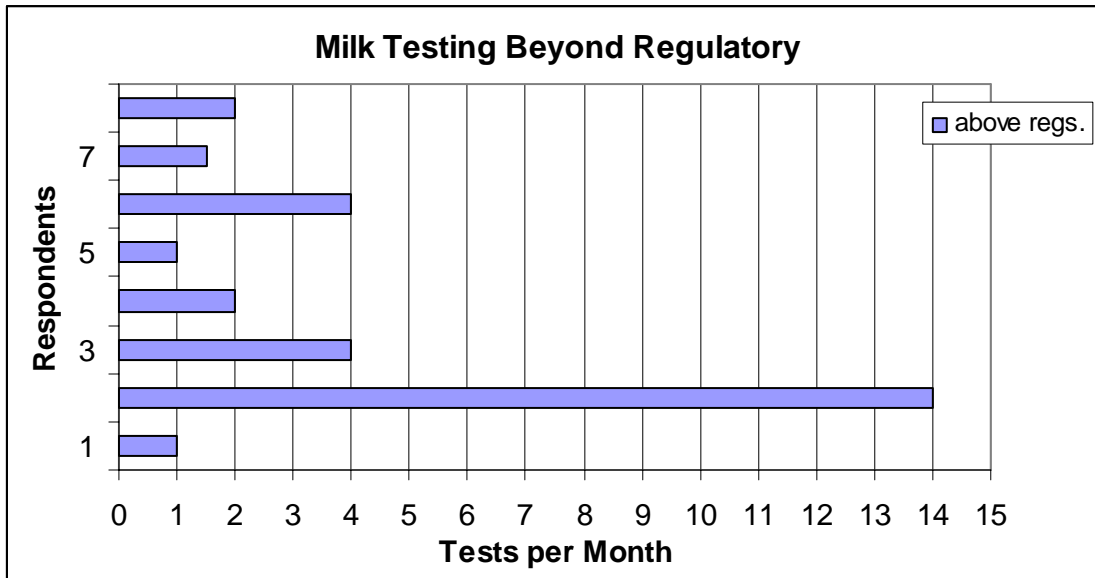
respondents ranked the VT Agency of Agriculture as their top 3 choice for assistance with HACCP plans. 18.8% of the respondents ranked UVM Vermont Institute of Artisan Cheese (VIAC) as their top choice for assistance with HACCP plans and 56.3% as their top 3 choice.



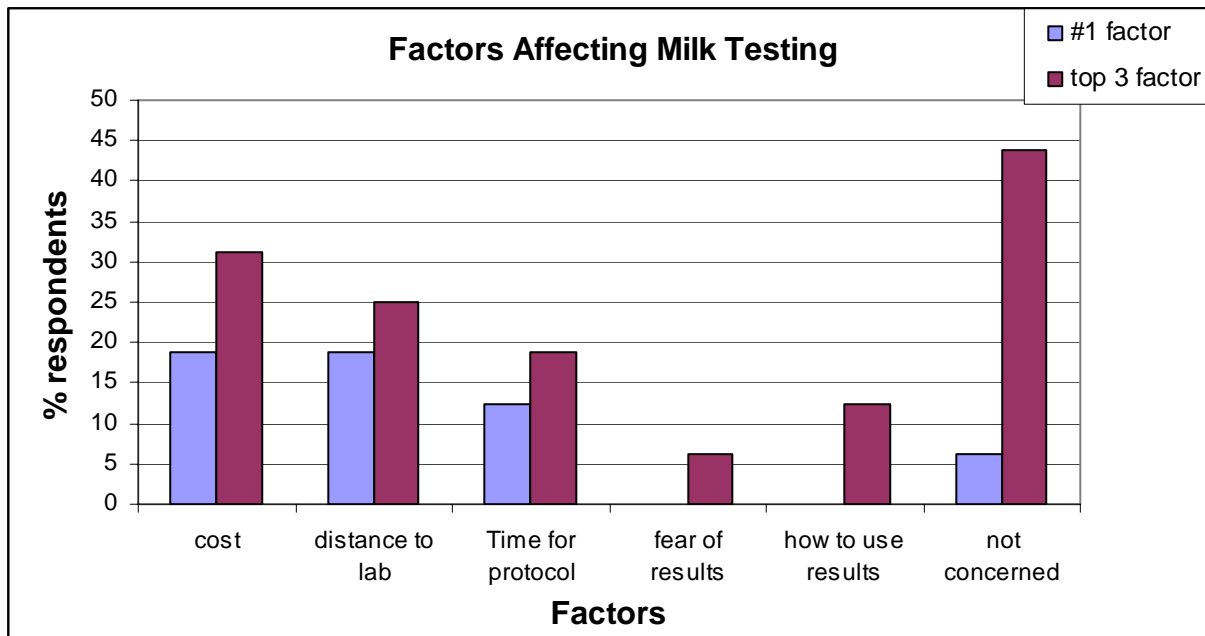
Asked who should provide assistance with on-farm processing, 37.5% of the respondents ranked the VT Agency of Ag as their top choice with 75% ranking the Agency as their top 3 choice. 25% of the respondents ranked VIAC as their top choice for on-farm assistance with 62.5% ranking VIAC as their top 3 choice.



Asked who should provide assistance with marketing and promotion of on-farm processed dairy products, 50% ranked the VT Cheese Council their top choice with 81.3% ranking the Vermont Cheese Council as their top 3 choice. 31.3% of the respondents ranked the VT Agency of Ag as their top choice for assistance with marketing and promotion with 81.3% ranking the Agency as their top 3 choice.

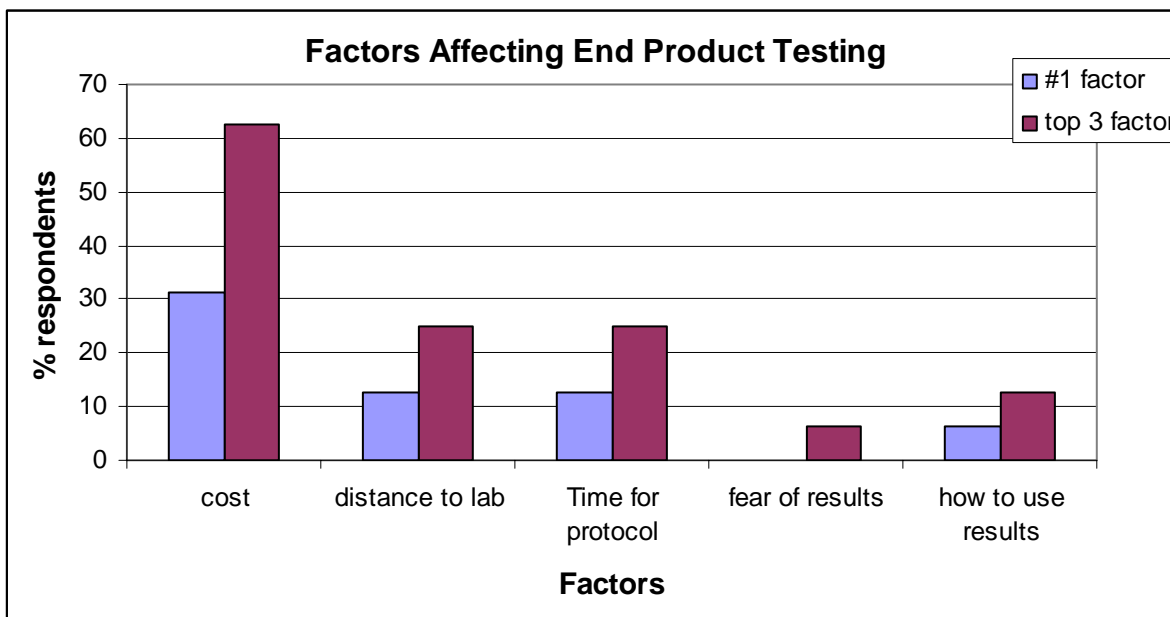


The survey questioned how often milk and end products were tested. Milk is tested once per month for regulatory purposes. On average the respondents test their milk 2.77 times per month above the required testing. 50% of the respondents do end-product testing and on average 16 tests are completed per year.



The survey then delved into the reason behind the rate of testing of milk and end products. Respondents were asked to rate 1 to 3, 1 being most important what factors made it difficult to test milk quality. 18.8% ranked the cost of testing as the number one factor that makes it difficult to test for milk quality with 31.3% citing cost as a top 3 concern. Many respondents answered “not concerned as long as the end product meets business standards” – this was a top 3 choice for 43.8% of the respondents. There were several comments by respondents with most stating that the buyer of their milk that is not used on the

farm does additional testing – for free. Others stated that milk quality had never been an issue. One respondent felt additional testing was necessary stating “It is not difficult at all, we need to know and we have been tested since day 1.”



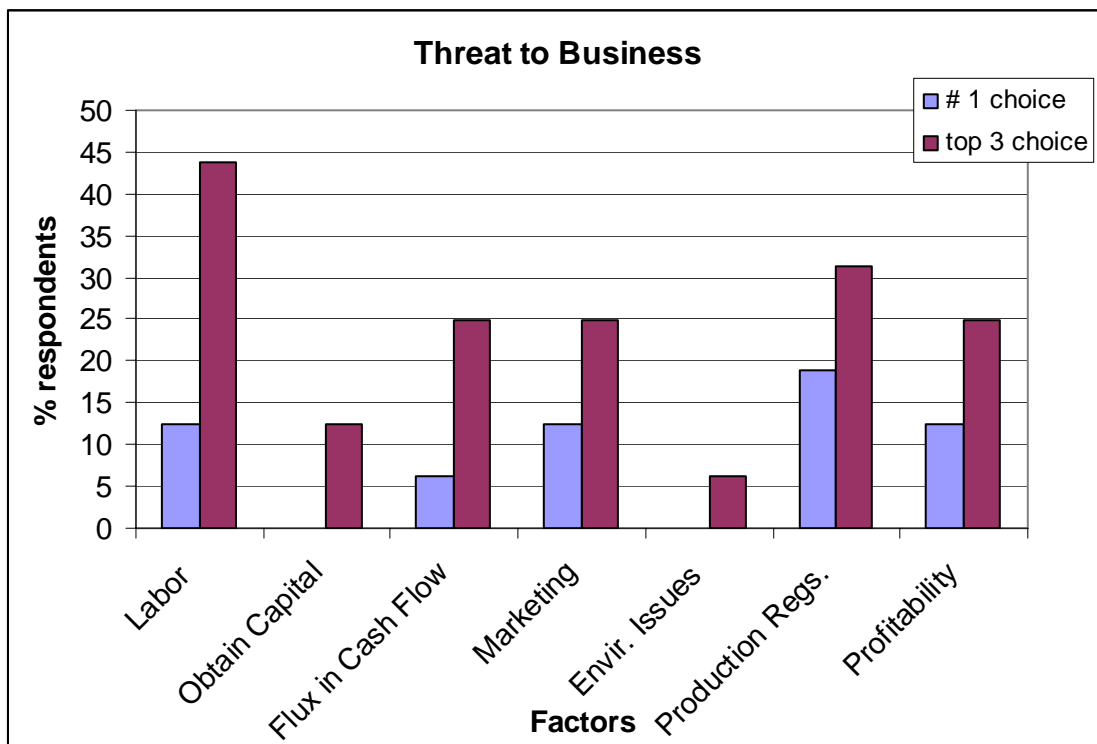
When asked what factors make it difficult to test end product for quality, 31.3% of the respondents stated that cost was the number 1 issues with 62.5% citing cost as their top 3 issue. Time and fear of the results were also listed as concerns with 25% of the respondents having this issue as a top 3 response. One respondent stated that testing was “not necessary with 90+ day cheeses, risk too low to make testing cost effective.”

The survey asked respondents to name one staff position in Vermont that would serve producers – what would that person do and what organization would they be a part. The following responses were provided:

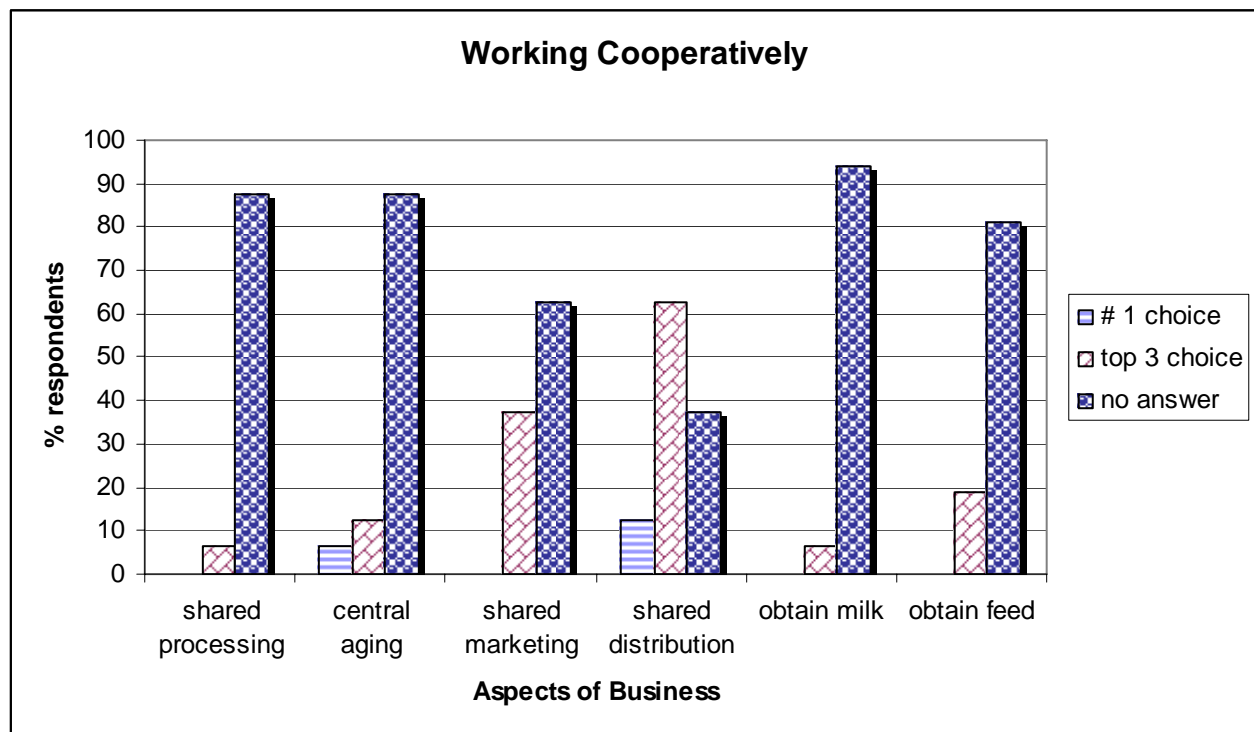
- Carol Delaney is it.
- Non-regulatory help with quality control and safety
- Coordinator for VT Cheese Council
- Governor's office in charge of appropriating funds to help market small diverse quality on-farm production - assistance in transportation costs to.
- Network, Joint Marketing etc. - VT Cheese Council
- Big subject
- Product testing coordinator - go around collect samples, test, confidential, UVM Extension not sure.
- Someone to organize temp labor and insure temporary workers, minimal training - hygiene mostly and milk production fundamentals.
- Someone in the VT Department of AG to start a farm labor service to help dairy farmers find labor/relief workers.

Business Objectives and Goals

The survey requested respondents to think about their businesses and the future of these businesses.



The question regarding the greatest threat to the continued success of the business showed the following results. Respondents were asked to rate the greatest threat 1 to 3 with 1 being the most important. 18.8% of the respondents stated that product regulations were the number 1 threat to their business with 31.3% showing this as their top three choice. 12.5% of the respondents ranked labor, marketing your products and profitability as their number one choice. Over all 43.8% of the respondents choose labor was a top three threat for their business. Other concerns that arose were age of the business owner and concern over the results of an injury or illness to the business. Another concern was the ability to expand the business due to regulations. There were concerns for food safety and product safety as well as “cost of doing business esp. workers comp and amount of paperwork for taxes and other requirements”.

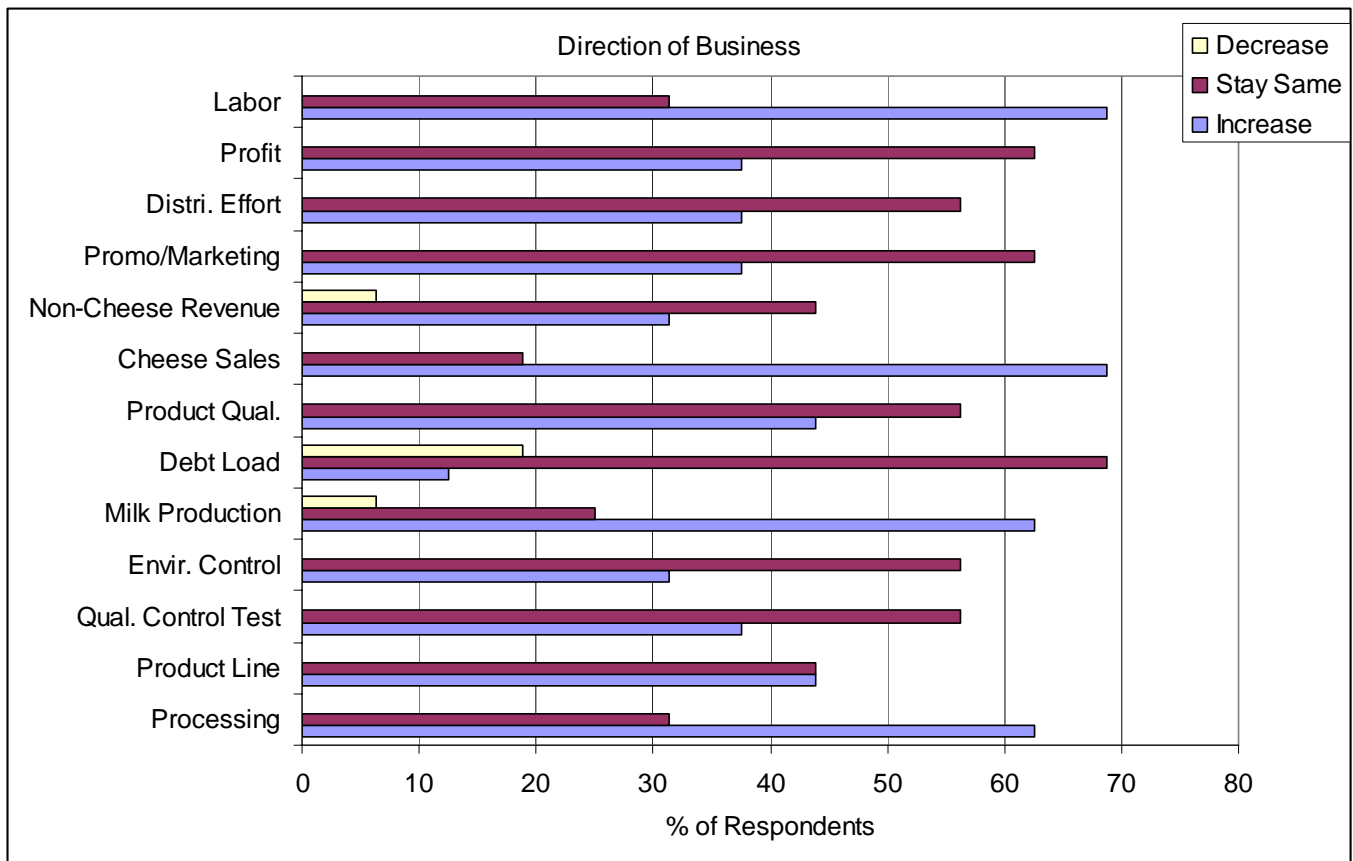


The respondents were asked if they would like to work cooperatively on several business aspects. 12.5% of the respondents cited shared distribution as their top choice in working together and shared distribution was the top three choices by 62.5% of the respondents. 37.5% of the respondents cited shared marketing as a top three choice for working cooperatively. Many did not respond to this question. Comments included the following:

- All of these are potentially valuable. In the future I see shared processing as a real possibility.
- Don't know I'm the only person in VT doing what I do.
- Shared affineur/employee (PT)

The respondents were asked if they kept separate the farm and on-farm processing finances. 50% of the respondents do not keep the finances separate with 37.5% keeping the finances separate. 12.5% either did not answer or keep some of the information separate.

The respondents were asked if they anticipated borrowing capital in the next three years. 50% of the respondents answered no to borrowing capital, 37.5% answered yes and 12.5% did not answer the questions.



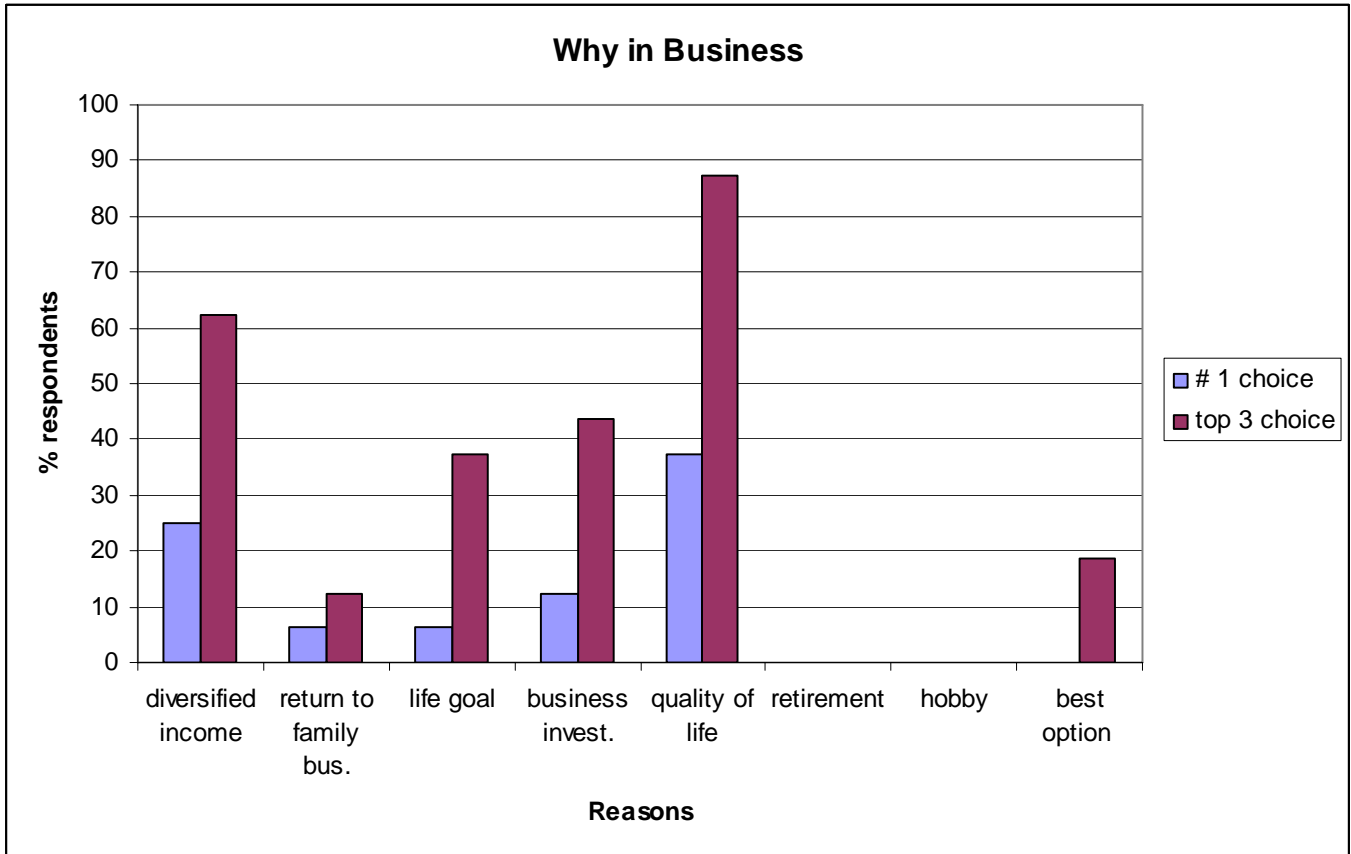
The survey also asked the direction of the business in the next three years. Respondents could answer increase, stay the same or decrease to a number of business aspects. Many respondents showed a willingness to increase aspects of their business but the greatest areas indicated for increase were 68.8% would like to increase labor and cheese sales. 62.5% would like to increase milk production and processing capacity. 68.8% of the respondents would like to stay the same on debt load with 62.5% would like to stay the same on promotion/marketing and profitability. 18.8% of the respondents would like to decrease their debt load.

The question was asked on thoughts for retirement in the next 5 – 10 years. Overwhelming, 93.8%, the respondents have no intention to retire in the next 5 to 10 years. Asked if when they did retire would they need to dissolve the business to support retirement 50% answered no with 37.5% unsure. The respondents also were unsure of who would continue their business with 56.3% stating they had no family member to transition the business ownership. Although they may not have a family member to take over the business, the 62.5% of the respondents would consider transition of the business to a non-family member. Many of the respondents – 43.8% were unsure if their business would end when they retired.

Respondents were asked if they had a vision or mission statement for their business and if they would be willing to share these statements. 50% do have a mission or vision statement. Mission and or vision statements provided included the following:

- Develop a business model which can be replicated. Making it easier for farmers to get into business.
- To provide a healthy, happy, profitable working environment for family, employees, animals & community.
- To make small scale grass based dairy visible in VT while producing a high quality product (cheese) which accurately reflects terroir.

- To create one additional on-farm job & eventually have a positive impact on the fluctuations of the milk price paid to the farm for fluid milk. We will not be stopping the sales of fluid milk.

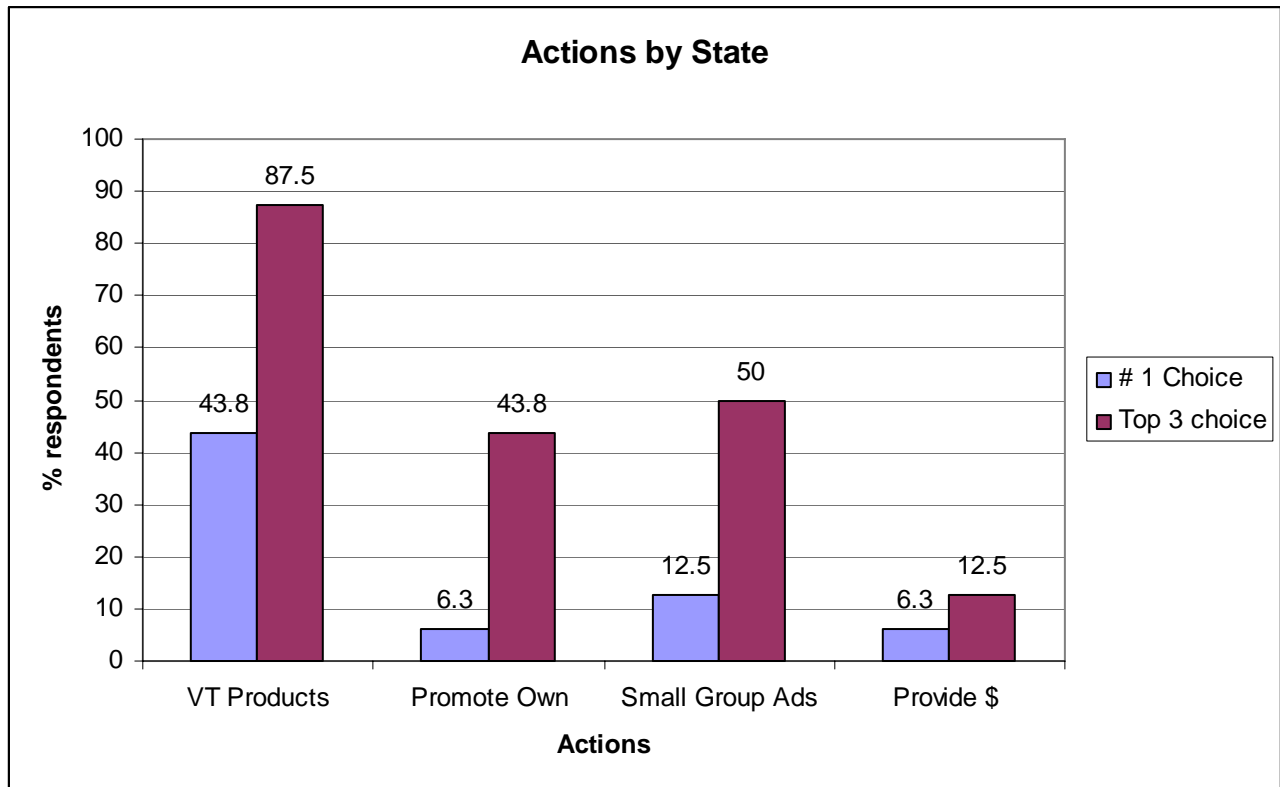


Respondents were then asked why they were in the business by ranking the 1-3 reasons – 1 being the most important. 37.5% of the respondents stated that “quality of life” was the number 1 reason they were in the business with 87.5% choosing this as their top 3 reasons for being in business. 25% stated that the on-farm processing business was a source of diversified income from farming with 62.5% choosing this as their top 3 reason for being in this business. One respondent stated that “love making cheese and thinking about food all day long”.

The respondents were also asked what best describes them – a farmer who started making cheese or a cheese maker who needed to farm to get the milk. 56.3% of the respondents were farmers that became cheese makers. 31.1% responded other and their comments are as follows:

- 76 year family business
- Desire to keep the farm relatively small by adding a value added product.
- Needed to farm, needed to produce cheese - had done neither.
- New career in rural environment
- Someone who wanted the whole package - we as farmers and cheese makers, each depends on the other.

Promotion



The first question in this section referenced a recent study of Vermont Artisan Cheese Producers. The study showed that all contacted wanted the State of Vermont to do more to promote the industry. The question in this survey asked what actions should the State take by ranking possibilities 1 to 3 with 1 being the most important. 43.3% of the respondents want the State to promote Vermont products with 87.5% of the respondents choosing this as their top 3 action. 12.5% of the respondents want the State to provide assistance for small group advertising with 50% of the respondents citing this as their top 3 choice. 43.8% of the respondents had providing assistance for promote their own products as a top three choice.

The respondents were asked if the state were to promote the industry through advertising – who should cover the cost and who should implement. This provided a mixed response with 35.5% of the wanting the state and regional dairy promotion funds to pay for the advertising but 50% of respondents wanted both the Cheese Council and the Vermont Agency of Agriculture to implement the program. In the comments many respondents stated the need for working together on this effort and supported joint funding from several sources.

Environmental Considerations

The survey included questions on environmental concerns. This was the section of the survey that had the greatest percent of unanswered questions. The first question asked respondents if environmental regulations or waste management issues had been a limiting factor in reaching goals of the business. 81.3% of the respondents stated no that these regulations and waste management issues had not been limiting to their business. There were concerns from many of what was to come in the area of environmental and waste management regulations. One respondent stated “Making regs fiscally reasonable for small producers - keeping it in Ag Dept” was an important issue.

Respondents were asked if they needed assistance with current, upcoming and or both for environmental issues. 68.8% of the respondents did not answer the question. For those that did respond 25% were concerned about upcoming regulations and 6.3% were concerned about both upcoming and current issues.

The respondents were asked if they needed technical or financial assistance to address environmental issues. Again over 60% - 62.5% did not answer the question. For those that did respond – 31.3% would like assistance with both technical and financial assistance to address environmental issues.

Observations and Recommendations

The survey made evident four areas where respondents were concerned, felt there was a weakness or felt there was an opportunity for improvement. These include:

- Labor
- Assistance
- Safety
- Future of the Business

Labor

It was clear from this survey that on-farm processors have issues with labor. Survey respondents indicated that labor was a top three barrier to the expansion and a top three threat to their business; indicated that finding part-time quality labor was an issue; the labor need was for on-farm work not processing; and a majority of the respondents would like to increase the use of labor in their businesses in the next 3 years. When asked in the survey if “At this point in the business, would cost out weigh benefit of hiring another person” 43.8% stated yes. The need for qualified labor for dairy farms in well known in Vermont and on-farm processors are not immune to this need. Many respondents felt a labor service that provides training for on-farm work would be beneficial. Other business changes may be needed to achieve the financial status of the business where there would be a greater benefit then cost to hiring an employee.

The survey inquired into the possibility of working cooperatively on many business aspects. The respondents would like to work cooperatively on shared distribution and shared marketing for their products. If a shared system could be formulated for marketing and distribution would this free up time and decrease the need for another employee for on-farm processors?

There are currently initiatives looking at on-farm labor. These include on-going training and information for owners and employees of dairy farms through UVM Extension, Vermont Farm Bureau and the Vermont Agency of Agriculture. A review of a past effort for a Farm Labor Service from UVM Extension and the potential of working cooperatively on shared marketing and distribution are two areas for consideration for future initiatives.

Assistance

In a previous survey of Artisan Cheese Producers – respondents stated that the State of Vermont should do more to promote the industry. In this survey, respondents were asked what should be done.

Marketing and promotion of dairy products were indicated frequently in this survey as areas for assistance. Respondents indicated that labor to assist with marketing and distribution was a concern; 20% of respondents had marketing and distribution as a barrier to expansion of their business; 25% of respondents had marketing as a top 3 threat to the success of their business; and 37% of respondents would increase marketing and promotion in the next three years and 62.5% would stay the same on their marketing and promotion efforts.

With marketing, distribution and promotion as concerns cited in this survey, respondents were asked what should be done and who should implement. Asked directly who should provide assistance with marketing and promotion, respondents choose the Vermont Agency of Agriculture and the Vermont Cheese Council as their #1 and top three choice. Comments were made by respondents concerning joint efforts in marketing and promotion by several state and promotion entities including, State Department of Tourism and the New England Dairy Promotion Board.

What to implement was also addressed. Action steps for the State of Vermont were requested and respondents choose State promotion of Vermont products, providing assistance for producers to promote their own products and provide assistance for small group advertising were all top three choices of respondents. When asked about advertising as a means to promote the industry, respondents wanted state and regional promotion groups to pay for the advertising and the Vermont Agency of Ag and the Vermont Cheese Council to implement the program.

This survey provides direction for the desired marketing and promotion assistance by on-farm processors. The Vermont Agency of Agriculture promotes Vermont Ag products through the Buy Local Program. There may be the potential to increase dairy related advertising through this program and or to explore an additional program specifically for dairy products. There may be the opportunity to work collectively on advertising and promotion of several Vermont products at a time. Examples include a cheese trail map that also includes wineries and breweries or a series of advertisements that include multiple dairy processors in the state with similar product lines.

Safety

This survey did not ask direct questions regarding food safety concerns. Safety was mentioned within comments by respondents and questions regarding HACCP plans and milk and end product testing are connected to food safety concerns.

The respondents indicated that the regulations governing processing of dairy products on-farm does not compromise the quality of their products. Respondents were asked who should provide assistance with HACCP plans on their farms. The top choices for the respondents were the Vermont Agency of Agriculture and the Vermont Institute of Artisan Cheese. These two entities were also selected as the top two choices for assistance with on-farm processing questions.

Safety was mentioned by one respondent as a threat to their on-farm processing business. The respondents answered questions regarding milk quality and end product testing. The respondents on a whole were not concerned with milk quality as long as the finish product met their specifications but many did more testing on milk than required. The factors affecting increased testing of milk for quality included cost and the distance to the laboratory. For testing of the end product, 50% of the respondents were testing their end products. The biggest issue affecting the testing of end product was the cost of the testing. Respondents were also concerned with the distance to the lab and the time required to implement a new protocol.

The Vermont Dairy Task Force was asked to look at Food Safety concerns by a member of the task force. From this survey, respondents indicated a willingness to accept assistance with HACCP plans from the Vermont Agency of Agriculture and the Vermont Institute of Artisan Cheese. The survey also indicated a concern for the cost of testing for milk and end product. These are two areas for consideration future initiatives.

Future of the Business

The on-farm processing businesses in Vermont have increased in number in the past ten years. It appears from this survey that a large majority will continue for the next 5 to 10 years with no retirement (93.8%) in site. On-farm processing is a “young to middle-aged” business in Vermont with potential still for growth of existing processors and the entrance of new on-farm processors. The transition of these businesses will be important when the time comes. At this point, many of the on-farm processors do not have family members to transition the business. Most are willing to look at a non-family member to take over the business. How will those transitions be made?

The respondents were asked why they were in the on-farm processing business. The top three choice was “quality of life”, then a source of diversified income for the farm and a good business investment with potential returns. Respondents were asked if they were a farmer that became a cheese maker or a cheese maker that became a farmer – the group responded that they were farmers first then cheese makers. How will new entrants be attracted to this business? Can existing farmers be attracted to on-farm processing or will new farms need to be started with the sole purpose of on-farm processing?

For new entrants to this business some areas will need attention. These new entrants should continue to take part in business planning but also seek out as much assistance as possible. The respondents answered that having assistance would have shortened the time needed to make a saleable product for their business. The respondents also answered that lenders were learning more about their businesses but there are still some obstacles to obtaining financing. A small number expected to borrow capital in the next three years (37.5%) and with 68.8% stating they would like to keep their debt load the same with only 12.5% stating that they would like to increase their debt load. Last but not least there is an area for improvement around environmental regulations and providing assistance through the regulatory process. Can these programs for assistance to on-farm processors be coordinated to allow farmers and interested new entrants a “one-stop shop” for all of their needs?

Conclusion

The on-farm processing industry in Vermont is vibrant and poised to grow. The growth from 1995 to 2005 has shown the viability of these businesses and that the industry has reached a point of recognition within Vermont’s dairy industry. This survey requested information on the needs and opportunities for the on-farm processing industry and all respondents were candid in their responses and information provided.

This vibrant business sector is requesting assistance and would like to see the organizations in the state partner in providing this assistance. Assistance needs were made evident for marketing, promotion and distribution for their products. Assistance in forming a labor pool was shown from the responses as well.

There were also areas of concern for the on-farm processing sector. The ability to find labor especially for the farm work required for these processors was sited as an issue. Safety of the product produced was also sited. Many buyers of on-farm processed products are beginning to request evidence of safety protocols (HACCP) from these processors. It may be possible to combine safety protocols with marketing of Vermont on-farm processed dairy products.

An area that may require further inquiry is for environmental regulations. The respondents were concerned about the future regulations that may be imposed on their farms and on-farm processing facilities. This may be affecting the willingness to expand processing capacity.

The results from this survey will be provided to many organizations in Vermont for their review. The Vermont Dairy Task Force who commissioned this survey will utilize the results to set direction and initiatives for on-farm processing in Vermont. It is the hope of the Dairy Task Force and its members that all organizations can coordinate their activities to provide the best information and assistance for on-farm processors of dairy products in Vermont.

The Vermont Dairy Task Force would like thank all of the respondents that took time from their busy schedules to complete this survey. They would also like to thank Ransom Conant and Seth Chapelle for their work on the survey questions.

Appendix 1

Vermont Dairy Task Force On-Farm Processing Survey - Results

35 Surveys Sent out	16 returned	45.7% returned
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Farm and On-Farm Processing Information

1. How many animals are you milking on your farm? _____ How much milk per year? _____

	Animals all species	Cows	Goats	Sheep
Total Number	1,202	781	108	345
Average # per respondent	75	71	36	115
Largest Number	360	360	44	200
Smallest Number	5	5	24	60

Milk Per Year

	All species	Cows	Goats	Sheep
Total pounds	18,711,000	18,536,000	95,000	80,000
Average per respondent	1,701,000	2,317,000	47,500	80,000
Largest Volume	10,200,000	10,200,000	50,000	80,000
Smallest Volume	45,000	54,000	45,000	80,000

Note: not all respondents identified milk volume.

2. What species of animal do you milk? (circle all that apply) If more than one species how many of each?

Dairy Cows _____ how many Dairy Goats _____ how many
 Dairy Sheep _____ how many Water Buffalo _____ how many

	Cows	Goats
Farm #1	8	40
Farm #2	6	85

3. What products do you produce? (cheese (include types), milk, ice cream, yogurt.. etc.) How much of each on an annual basis? (If more than 6 varieties please describe on back)

Product _____ pounds or gallons/year _____

	Cheese	Yogurt	Fluid Milk	Butter
# respondents making product	11	2	3	1
Lbs/gallons	230,000 lb	85,000 lb.	1,115,141 gal.	2,000 lb.
Ave. lbs/gallons per respondent	20,909 lb	85,000 lb.	371,714 gal.	2,000 lb.

Largest	60,000 lb	85,000 lb.	1,113,600 gal.	2,000 lb.
Smallest	1,000 lb	85,000 lb.	81.2 gal.	2,000 lb.

Note: Not all respondents provided pound/gallons of product produced.

Average number of products per farm was 2. Largest 2 - smallest 1.

4. How many days per week do you manufacture product, on average? _____ Days/week

Average Number of Days	2.97
Highest number	7
Lowest Number	0

5. Number of non-family employees? _____ Number of family members involved in the business (farm and on-farm processing)? _____

	Non-Family Employees	Family Members involved
Average	2.91	2.87
Highest Number	28	10
Lowest number	0	0

Business Planning

Do you have a written business plan? y/n _____ If yes, what year was it completed? _____

Have Business Plan	75%
Do Not have Business Plan	25%
Average Age of Business Plan	4 years
Oldest	10 years
Newest	2 years

A recent study of Vermont Specialty Cheese Producers found that the greatest obstacle during business start-up was obtaining capital/credit. The same study found that lenders required comprehensive business plans and records to issue capital.

Did you get assistance in writing your business plan? y/n _____

- If you got assistance in writing your plan, who helped? _____
- Did this assistance help you secure capital? y/n _____

Assistance with Business Plan	25%
No Assistance with Business Plan	50%
Did not answer Question	25%
Who Provided Assistance	Farm Viability – 2; SBA – 1; Independent Consultant – 1; Family Member – 1
Assistance easier to obtain capital	12.5%
Did not make easier to obtain capital	18.8%
No answer	56.3%

Comments:

yes have a plan - no help	Yes through a grant program - no through lenders.	No - not enough assets to borrow from the bank. They did not emphasize any value on "the plan", only owned assets. We self funded the initial costs in 1998.
yes have a plan – helped	NO -all capital was internal	

Obtaining Capital

Have you had to incur capital limiting costs to meet regulatory issues? y/n _____ If so, please explain.

% yes	25%
% no	62.5%
% no answer	12.5%

If yes Explain:

We had to pay \$39,000 for a septic system for handwash sink.
Septic - need for a bathroom and a septic system
Engineering etc. to meet ACT 250 & VT ag regs
Between farm and processing too many to discuss here.

How long did the loan process take? (in months) _____

Average	2.2 months
Longest	6 months
Shortest	0.5 month

Note: comparison was made between respondents that had a business plan and those that did not on the length of time for the loan process. Not all respondents answer both questions.

No business plan – 0.5 months

With a business plan – 2.7 months

Did you apply for a commercial loan or an agricultural loan? _____

Commercial Loan	12.5%
Ag Loan	31.3%
Both	12.5%
No Answer	43.8%

- What were the obstacles you faced in applying for either a commercial or agricultural loan?

5 with obstacles	
	Didn't have dairy experience so it was considered a high risk loan.
	Skepticism on the viability of the cheese making process and small # of cows.
	We were hobbled by having to have our farm business partners complete paperwork for our cheese business loan. They are a separate business.
	Initially lenders were apprehensive about start-up cheese - now they have gained confidence.
	Interest rates and collateral issues
4 no obstacles	
	No obstacles for the loan but we secured the loan with the same lender that is thoughtfully familiar with our farm business.
	None
	None
	none - valuable land

Regulations

In relation to your cheese processing, have you had to meet state or federal regulations that have compromised the quality of your product? y/n _____ If so, please explain. _____

Yes	6.3%
No	81.3%
No Answer	12.5%

yes comments	
	One of our cheeses is much better @45 days. We have to age it at least 60.
no comments	
	On many of our issues "the state" or dairy inspector has been very helpful in getting us set up right, without having to redo much of anything.
	Regulations have only helped enhance our product.
	Improved quality generally
	However the types of cheeses we make were largely determined by the regulations concerning raw milk cheeses - must be aged 60 days.

Start-up and Expansion

When you felt that you were marketing cheese as a business, how long did it take before your demand increased to meet your production goals? _____

Average time	1.8 years
Longest	4 years

Shortest	Immediately
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Comments
Always had too much demand
We have had rapid growth with several expansions. Demand typically exceeds our capacity
We match our demand with our production goal.
Still hasn't
Immediate
In first 6 mo we doubled production. By year 4 we were maxed out for curing and storage.
Immediately
Not there yet

- At this same point, did your goal of production match your businesses capacity? y/n _____

Yes	40.0%
No	33.3%
No Answer	26.7%

Comment
Unclear-we make all we can, limited by # of cows, feed & storage - there is unlimited demand for our product.

Starting from the first batch of cheese that you made, how long did it take to get to a saleable product? (in months)

_____ Would assistance have shortened this period of time? y/n _____

Average Time to Saleable Product	6.8 months
Longest Time	3 years
Shortest Time	1 day

Comments
Sold when ready
I used the year it took me to get through the regulatory process to perfect my product.

Would Assistance Shortened the time to saleable product?	
Yes	43.8%
No	31.3%
No Answer	18.8%
Maybe	6.3%

Comments
YES -enjoyed assistance from UVM's Food & Nutrition Dept.
Yes hired a consultant
We had great luck working with Peter Dixon - couldn't have done it without him.
We experimented in the kitchen before we built our plant, so we knew cheese would be saleable.
No-that was 8 months of aging the cheese. The first batch was saleable.

Vermont producers have noted that increased demand for their product has generated pressure to expand their business. What have been the most significant barriers to expansion? (Rank top 3, 1 being most important)

_____ Labor _____ Capital _____ Product _____ Milk Production _____ Marketing/Distribution
 _____ Processing Capacity _____ Aging Capacity _____ Have not faced expansion issues
 Other _____

	Number 1 issue	Respondents top 3 concern
Labor	33.3%	73%
Capital	0.0%	6.3%
Product	0.0%	0.0%
Milk Production	13.3%	33.3%
Marketing/Distribution	0.0%	20%
Processing Capacity	6.7%	40%
Aging Capacity	6.7%	27%
Not Faced Expansion Issue	0.0%	12.5%

Other
Shipping costs
3- regulatory process to expand - now because of waste water issues, there is another reg agency involved along with Agency of ag.
No wish to expand significantly.

Labor

Do you have a problem getting quality full-time labor? y/n _____

Do you have a problem getting quality part-time labor? y/n _____

	Full Time Labor	Part Time Labor
Yes	18.8%	43.8%
No	56.3%	37.5%
No Answer	12.5%	12.5%
Not Applicable	12.5%	6.3%

A majority of producers in a recent survey of Vermont Specialty Cheese Producers said that they had issues with labor. What type of labor is most difficult to find? (Circle one)

○ Production Processing Marketing and Distribution

	Percentage	Comments
Production	37.5%	Milking and on-farm help
Processing	12.5%	Affinage
Marketing and Distribution	12.5%	

No Answer	37.5%	
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At this point for your business to hire another laborer, would the cost outweigh the benefit? y/n _____

Yes	43.8%
No	25.0%
No Answer	18.8%
Not Applicable	12.5%

Sales

What percent of your milk volume goes into cheese/milk/yogurt/ice cream? _____ Is any milk volume sold to a cooperative or handler? (What percent?) _____

	Percent to Products	Sold to Co-op Handler	On-Farm Use – raise young stock and household use
Average	83.3%	15.7%	0.63%
High	100.0%	97%	10%
Low	3.0%	0.0%	10%

What percent of your cheese/milk/yogurt/ice cream in pounds is marketed to the following? (in percent)

Wholesalers _____ Retailer Contracts _____ Restaurants _____

Direct Customer Order _____ On Farm Sales _____

What is your most desired market plan for sales? (In percent)

Wholesalers _____ Retailer Contracts _____ Restaurants _____

Direct Customer Order _____ On Farm Sales _____

	Current average % sold in this category	Desired average % sold in this category	% of respondents sell through this category	% of respondents desired sell through this category	Current more than 50% of sales through this category	Desired more than 50% of Sales through this category
Wholesaler	53.77%	48.38%	84.6%	76.9%	61.5%	61.5%
Retail Contract	18.12%	19.5%	69.2%	61.5%	23.1%	23.1%
Restaurants	13.62%	14.38%	61.5%	69.2%	7.7%	7.7%
Direct Customer Sale	3.35%	3.12%	38.0%	30.8%	0.0%	0.0%
On-Farm Sale	11.5%	14.62%	53.8%	54.0%	7.7%	7.7%

On Farm Assistance

Voluntary quality control measures, as well as buyer initiated measures such as HACCP (Hazard Analysis Critical Control Points) plans continue to become more of a real issue for producers. Which organization should provide assistance for the development of such plans? (Rank top 3, 1 being most important)

State Department of Agriculture
 State Department of Health
 UVM VIAC
 UVM Extension
 UVM Nutrition and Food Science Department
 Vermont Cheese Council
 Private Consultant
 UVM Center for Sustainable Ag/ Small Ruminant Project Other _____ .

	# 1 issue	Respondents top 3 choice
Agency of Agriculture	31.3%	68.8%
State Depart. Of Health	0.0%	18.8%
UVM VIAC	18.8%	56.3%
UVM Extension	12.5%	31.3%
UVM Nut. & Food Science	6.3%	25.0%
VT Cheese Council	12.5%	25.0%
Private Consultant	6.3%	18.8%
UVM Center For Sustainable Ag	12.5%	25.0%
Other – Comments		
Needs to be a cooperative effort. Cheese Council needs to promote but not implement.		
Let's keep it simple and streamline for processors.		

Which organization should provide assistance with on farm processing? (Rank top 3, 1 being most important)

State Department of Agriculture
 State Department of Health
 UVM VIAC
 UVM Extension
 UVM Nutrition and Food Science Department
 Vermont Cheese Council
 Private Consultant
 UVM Center for Sustainable Ag / Small Ruminant Project Other _____ .

	Number 1 issue	Respondents top 3 choice
Agency of Agriculture	37.5%	75.0%
State Depart. Of Health	0.0%	6.3%
UVM VIAC	25.0%	62.5%
UVM Extension	6.3%	37.5%
UVM Nut. & Food Science	6.3%	6.3%
VT Cheese Council	6.3%	37.5%
Private Consultant	0.0%	18.8%
UVM Center For Sustainable Ag	12.5%	18.8%
Other – no other choices or comments indicated		

Which organization should provide assistance with marketing and promotion? (Rank top 3, 1 being most important)

_____ State Department of Agriculture _____ State Department of Health _____ UVM VIAC
 _____ UVM Extension _____ UVM Community Development and Applied Economics Depart.
 _____ Vermont Cheese Council _____ New England Dairy Promotion Board
 _____ Private Consultant Other _____

	Number 1 issue	Respondents top 3 choice
Agency of Agriculture	31.3%	81.3%
State Depart. Of Health	0.0%	0.0%
UVM VIAC	0.0%	6.3%
UVM Extension	0.0%	0.0%
UVM Comm. Develop & Applied Econ	0.0%	12.5%
VT Cheese Council	50.0%	81.3%
New England Dairy Promotion Board	6.3%	50.0%
Private Consultant	0.0%	0.0%
Other – Comments	0.0%	12.5%
3 - organic organizations such as NOFA		

How often do you test milk outside of what is regulated? (Regulated once per month) _____

	Tests performed about monthly requirement
Average	2.77
Most	15
Least	0
No Answer	3

Do you do any end-product testing? y/n _____ If yes, how often? _____

	End Product Testing		If Yes How Often
Yes	50.0%	Average	16 test per year
No	37.5%	Highest	52 tests per year
No Answer	12.5%	Lowest	1 test per year

What factors make it difficult to test your milk quality? (Rank top 3, 1 being most important)

_____ Cost _____ Distance to Lab _____ Time it takes to implement a new protocol
 _____ Fear of knowing the results _____ Wouldn't know how to utilize the results
 _____ Not concerned as long as the end product meets your business standards Other _____

	# 1 issue	Respondents top 3 concerns
Cost	18.8%	31.3%
Distance to Lab	18.8%	25.0%
Time it takes to implement a new protocol	12.5%	18.8%
Fear of knowing results	0.0%	6.3%
Wouldn't know how to utilize results	0.0%	12.5%
Not concerned as long as the end product meets business standards	6.3%	43.8%
Other – Comments		
3- milk is sampled 2-3 times per month by fluid milk buyer. For free. This is all the info we need.		
We shipped milk 15 years & milk quality has always been #1		
Meeting existing business and regulatory standards		
Milk tested through handler		
It is not difficult at all, we need to know & we have been tested since day 1.		

What factors make it difficult to test your final product quality? (Rank top 3, 1 being most important)

_____ Cost _____ Location to Lab _____ Time it takes to implement a new protocol
 _____ Fear of knowing the results _____ Wouldn't know how to utilize the results Other _____

	# 1 issue	Respondents top 3 concerns
Cost	31.3%	62.5%
Distance to Lab	12.5%	25.0%
Time it takes to implement a new protocol	12.5%	25.0%
Fear of knowing results	0.0%	6.3%
Wouldn't know how to utilize results	6.3%	12.5%
Other – Comments		
Testday is easy - set up an account and go.		
2- not necessary with 90+ day cheeses, risk too low to make testing cost effective.		

If you could name one staff position to any organization in Vermont that would serve producers, what would they do, and in what organization would they be? _____

Person	Organization
Carol Delaney is it!	Non-regulatory help with quality control and safety
	Coordinator for VT Cheese Council
	Governor's office in charge of appropriating funds to help market small diverse quality on farm production - assistance in transportation costs to.
	Network, Joint Marketing etc. - VT Cheese Council
	Big subject
	Product testing coordinator - go around collect samples, test, confidential, UVM Extension not sure.
	Someone to organize temp labor and insure temporary workers, minimal training - hygiene mostly and milk production fundamentals.
	Someone in the VT Department of AG to start a farm labor service to help dairy farmers find labor/relief workers.

Business Objectives and Goals

What is the greatest threat to the continued success of your operating business? (Rank top 3, 1 being most important)

Labor _____ Obtaining capital _____ Fluctuations in cash flow _____ Marketing your product
 Environmental issues _____ Production regulation _____ Profitability _____ Other _____

	# 1 issue	Respondents top 3 concerns
Labor	12.5%	43.8%
Operating Capital	0.0%	12.5%
Fluctuations in cash flow	6.3%	25.0%
Marketing your product	12.5%	25.0%
Environmental Issues	0.0%	6.3%
Production Regulations	18.8%	31.3%
Profitability	12.5%	25.0%
Other – Comments		
Cost of doing business esp. workers comp & amount of paperwork for taxes & other requirements.		
3 - illness or injury		
regulations to expansion		
Challenges not threats		
Growth - we are too big to be small too small to be big.		
Safety Issues for all Producers		
Aging		
Not feeling threatened.		

Research has found that producers cooperatively working together could reduce costs and promote profitability. Which of the following areas in you operation would you seriously consider if available?

_____ Shared processing facilities _____ Central aging facilities _____ Shared marketing
 _____ Shared distribution _____ Obtaining milk _____ Obtaining feed Other _____

	# 1 issue	Respondents top 3 concerns
Shared processing facilities	0.0%	6.3%
Central Aging Facility	6.3%	12.5%
Shared Marketing	0.0%	37.5%
Shared Distribution	12.5%	62.5%
Obtaining Milk	0.0%	6.3%
Obtaining Feed	0.0%	18.75%
Other – Comments		
All of these are potentially valuable. In the future I see shared processing as a real possibility.		
Don't know I'm the only person in VT doing what I do.		
None		
None of the Above		
shared affineur/employee (PT)		

Do you separate your farm finances from your processing finances? y/n _____`

Do you anticipate borrowing capital in the next 3 years? y/n _____

	Separate Finances	Borrow Capital next 3 years
Yes	37.5%	37.5%
No	50.0%	50.0%
No Answer	6.3%	6.3%
Some	6.3%	6.3%

What is the direction of your business in the next 3 years? (Circle one which best apply)

- Processing capacity increase stay the same decrease
- Product line increase stay the same decrease
- Quality control (testing) increase stay the same decrease
- Environmental control increase stay the same decrease
- Milk production increase stay the same decrease
- Debt load increase stay the same decrease
- Product quality increase stay the same decrease
- Cheese sales increase stay the same decrease
- Non-Cheese sale revenue increase stay the same decrease

- Promotion / Marketing increase stay the same decrease
- Distribution effort increase stay the same decrease
- Profitability increase stay the same decrease
- Labor increase stay the same decrease

	Increase	Stay the Same	Decrease	No Answer
Processing Capacity	62.5%	31.3%	0.0%	6.3%
Product Line	43.8%	43.8%	0.0%	12.5%
Quality Control Testing	37.5%	56.3%	0.0%	6.3%
Environmental Control	31.3%	56.3%	0.0%	12.5%
Milk Production	62.5%	25.0%	6.3%	6.3%
Debt Load	12.5%	68.8%	18.8%	0.0%
Product Quality	43.8%	56.3%	0.0%	0.0%
Cheese Sales	68.8%	18.8%	0.0%	12.5%
Non-Cheese Sales Revenue	31.3%	43.8%	6.3%	18.8%
Promotion/Marketing	37.5%	62.5%	0.0%	0.0%
Distribution Effort	37.5%	56.3%	0.0%	6.3%
Profitability	37.5%	62.55	0.0%	0.0%
Labor	68.8%	31.3%	0.0%	0.0%

In the next 5-10 years do you plan on retiring? y/n _____

From a financial standpoint, will you be forced to dissolve your business in order to support your retirement? y/n .

Are there family members looking to transition into an ownership role in the business? y/n _____

- If no, would you consider transitioning a non-family member into an ownership role in your business? y/n _____

When you retire, will the business end? y/n _____

	Retire next 5- 10 yrs.	Dissolve Business support retirement	Family members transition to ownership	If no – non family member to transition	Will business end when retire
Yes	6.3%	6.3%	6.3%	62.5%	6.3%
No	93.8%	50.0%	56.3%	18.8%	31.3%
No Answer	0.0%	6.3%	0.0%	12.5%	18.8%
Unsure – Maybe	0.0%	37.5%	37.5%	6.3%	43.8%

Do you have a written vision or mission statement for your business, and if yes, would you share it? y/n

Yes	50.0%
No	31.3%
No Answer	18.8%
Mission Statements	
Develop a business model which can be replicated. Making it easier for farmers to get into business.	
To provide a healthy, happy, profitable working environment for family, employees, animals & community.	
To make small scale grass based dairy visible in VT while producing a high quality product (cheese) which accurately reflects terroir.	
Was to create one additional on-farm job & eventually have a positive impact on the fluctuations of the milk price paid to the farm for fluid milk. We will not be stopping the sales of fluid milk.	

Why are you in the business you are in? (Rank top 3, 1 being most important)

Source of diversified income from farming Returning to a family business
 Life-long goal Business investment where you saw potential returns Quality of life
 For retirement As a hobby As the best option for your available resources
 Other _____.

	# 1 issue	Respondents top 3 choice
Source of Diversified Income from farming	25.0%	62.5%
Returning to family business	6.3%	12.5%
Life Long Goal	6.3%	37.5%
Business investment with potential returns	12.5%	43.8%
Quality of Life	37.5%	87.5%
For Retirement	0.0%	0.0%
As a Hobby	0.0%	0.0%
Best Option with available resources	0.0%	18.8%
Other – Comments	6.3%	6.3%
1 -love making cheese & thinking about food all day long		

Please circle the statement that best describes you.

A farmer who saw opportunity in cheese and started making cheese.

A cheese maker who needed to farm to produce the milk for their cheese.

Other

Farmer to Cheese Maker	56.3%
Cheese Maker to Farmer	12.5%
Other – comments	31.3%
76 year family business	
Desire to keep the farm relatively small by adding a value added product.	
Needed to farm, needed to produce cheese - had done neither.	
New career in rural environment	
Someone who wanted the whole package - we as farmers and cheesemakers, each depends on the other.	

Promotion

In a recent Vermont study of Artisan Cheese Producers, every producer contacted said that the state should do more to promote the industry. What actions should the state take? (Rank top 3, 1 being most important)

___ Promote Vermont state products ___ Provide assistance to promote own products

___ Provide assistance for small group advertising

___ Provide financial assistance to individuals allowing them to spend as needed?

Other _____

	# 1 issue	Respondents top 3 choice
Promote VT State Products	43.8%	87.5%
Provide Assistance to Promote own products	6.3%	43.8%
Provide assistance for small group advertising	12.5%	50.0%
Provide financial assistance to individuals to spend themselves	6.3%	12.5%
Other – Comments	0.0%	6.3%
Help lower the barriers to entry - facility design technical assistance lower cost of capital		
Infrastructure support, from trucking to small USDA Slaughter houses.		
Promote something other than cows.		

If the state were to promote the industry through advertising, who should cover the cost, and who would be responsible for the promotional effort? _____

WHO PAYS	
State or Regional Promotion	35.3%
General Fund of State	5.9%
Tourism	5.9%
VT Cheese Council	17.6%
Cheese Makers	11.8%
Buy Local	5.9%
Cost Share	5.9%
Agency of Ag	11.8%
Comments	
Cost sharing by State/NEDPB/producers	
General fund, dairy promotion and interested farms	
Tourism \$, Dairy Promotion and VCC	
VT Dairy Promotion cover cost	
Share cost	
Buy local campaign/agency of ag	
In theory no one wants to pay for advertising, but the VCC if they had the skill set should probably be responsible.	
Dairy promotion board	
Cheese producers	

WHO IMPLEMENTS	
Tourism	25%
VT Cheese Council	50%
Agency of Ag	50%
Comments	
Agency of AG/Cheese Council	
State effort	
Department of Tourism	
Targeted advertising - It could be easy & cheap to finance tasting all over the country - need 1 person - cheesemakers would donate cheese.	
VT Cheese Council Effort	

Environmental Considerations

Have environmental regulations or waste management issues been limiting factors in reaching the goals of your business? y/n _____ If yes, how? _____

- What are the issues that need to be addressed? _____

Yes	18.8%
No	81.3%
No Answer	0.0%
If Yes – How	
The regs require toilets, bathrooms, which are redundant on farmsteads operations this requires full blown septic systems which otherwise would to be necessary. Otherwise no problems.	
Engineering for ACT 250	
Now they are involved in new plant construction.	
No – How	
Being the first farmhouse cheese makers in the state, we were grandfathered into a lot of these new regs.	
Clearer definition of what is "on-farm" business and what is "agri-business" and what rules fairly apply to each.	
Issues to Address	
Help for producers to meet these appropriate regs.	
Making regs fiscally reasonable for small producers - keeping it in Ag Dept.	

Does your business need assistance meeting: (circle one)

Current environmental issues Upcoming environmental issues Both current & upcoming environmental issues

Current Environmental Issues	0.0%
Upcoming Environmental Issues	25.0%
Both Current and Upcoming Environmental Issues	6.3%
No Answer	68.8%

What type of assistance does your business need to address environmental issues? (Circle 1)

Technical	Financial Assistance	Both
Technical		0.0%
Financial Assistance		6.3%
Both		31.3%
No Answer		62.5%

Thank you very much for completing this survey! The results will be used to determine next steps by the Vermont Dairy Task Force to meet the needs and opportunities surrounding on-farm processing of dairy products.

Survey questions prepared by Seth Chapell and Ransom Conant as part of their senior class project at the University of Vermont. The Dairy Task Force appreciates the work that Seth and Ransom put into background research and questions for this survey.