REGIONAL FOOD ECONOMY STUDY

A SNAPSHOT OF THE FOOD SYSTEM IN AN 11-COUNTY REGION OF NORTHEASTERN AND EASTERN MONTANA

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TABLE OF CONTENTS

Cover Photos (left to right): ⬥Farver Farms, Scobey; ⬥Ijkalaka Grocery, Ekalaka; ⬥Bulletin Board, Ekalaka; ⬥Cold Storage, Glendive Chamber of Commerce; ⬥Produce, Hatchett Creek Farms; ⬥Farm Land with Grain Bins, Route 13.

Overview

Eastern Montana Food & Agriculture Development Center (Eastern Montana FADC), a project of Great Northern Development Corporation (GNDC) and Eastern Plains Economic Development Corporation (EPEDC), conducted this Regional Food Economy Study with support from No Kid Hungry and the Montana Department of Food and Agriculture Development Center Network.

The purpose of the Regional Food Economy Study is to determine how GNDC and EPEDC can support the development of a local/regional food system, to enhance economic development, food security and community health. This report will primarily be used as an internal-facing document for GNDC and EPEDC strategic planning and to guide and inform the work of the Eastern Montana FADC in its 11-county region: Valley, Daniels, Sheridan, Roosevelt, Garfield, McCone, Prairie, Dawson, Wibaux, Fallon, and Carter Counties.

Grain Elevators, Railroad Crossing and Bikes in Froid, Montana, October 2021.

Executive Summary

Rural communities in the area served by the Eastern Montana FADC are changing. Although each county has its own challenges, there are opportunities. The number of farms/ranches are decreasing across the region, yet the amount of farmland/ranchland is holding fairly steady, and there appears to be an increase in new and beginning farmers/ranchers as well as the overall population. The vast majority of Montana grown food is being shipped elsewhere. Although not all producers in the region express interest in local and regional food distribution and value-added production, there is interest and momentum among some producers to connect with local consumers — and it's already happening. Residents are unequivocally interested in locally and regionally produced foods. There are both perceived and real challenges in people providing — as well as accessing — locally and regionally grown and raised products, but next steps don't have to be done on a massive scale. There are exciting opportunities for the Eastern Montana FADC to continue to provide support and assistance.

Key Takeaways

- Activity exists. The potential for local/regional food pathways to develop organically from within the community is not a pipe dream. There is an opportunity for the Eastern Montana FADC to continue to "connect the dots" across vast distances and work through inevitable challenges and barriers.

- Interest in local/regional food is strong amongst consumers, despite price-consciousness. There is an opportunity for the Eastern Montana FADC to reinforce/develop this existing market through communications and education.

- The majority of farmers and ranchers in the region produce at commodity scale. While some producers have interest in local/regional and value-added, diversification/development of new food pathways requires capacity/risk, and not all producers are entrepreneurs or have the time/patience to work through logistics. The coordination, support and facilitation offered by Eastern Montana FADC, combined with grant-funded planning and R&D, will be invaluable in accelerating development of added-value in the region.

- Small population limits the availability of workers, volunteers, and champions. Despite this challenge, Eastern Montana FADC can continue to offer projects and programs that add capacity, support citizen leadership, and reward/recognize/incentivize volunteerism.

- Skepticism can be strong, people have seen failure. Local culture seems to have undercurrent inclinations/attitudes such as "do it the way it's been done," "it's good enough," or "that can't be sustained." At the same time, there is a tradition of entrepreneurial "can-do" energy and people recognize that change is happening and necessary. There is an opportunity for Eastern Montana FADC to continue to model collaborative, tenacious leadership. Celebrate small successes, help people recognize the significance even if economic impact is minimal and/or modest.

- By continuing to offer collaborative, tenacious leadership, Eastern Montana FADC can support development of local/regional food businesses and pathways. It can encourage problem solving

rather than giving up; avoid expectation of quick success; avoid unfair comparison of efforts in this population-sparse region to other more populated areas; and continue to offer down-to-earth, practical, positive energy.

- Emergency food and for-profit food distribution systems are distinct, but connections exist (eg: food recovery, potential to share distribution, food security depends on food available in-region.) Eastern Montana FADC can play an important role in helping to (a) maintain communication between sectors; (b) build from a can-do culture that includes generosity toward neighbors/community; and (c) reinforce creative, solution-oriented energy.

B & S Quickstop Convenience Store in Brockton, Montana. October 2021.

Introduction

Eastern Montana FADC, a project of Great Northern Economic Development Corporation and Eastern Plains Economic Development Corporation, recognizes that although this region is geographically challenged, there is “a large amount of opportunity for growth of emerging industries and expansion of existing agribusinesses.”

At the same time, the vulnerability of this remote region to food chain disruptions was made obvious by COVID-19. Inspired by the Montana Food Distribution Study (Nov 2020) and work completed for other communities, such as the Witchita-Sedgwick County Food System Master Plan (Fall 2020), Eastern Montana FADC sought to identify community-driven strategies to support local/regional food system development in the 11-county region of eastern Montana, including the Fort Peck Indian Reservation.

The purpose of the Regional Food Economy Study is to determine how Eastern Montana FADC, GNDC and EPEDC can support the development of a local/regional food system in ways that enhance economic development, food security and community health. As articulated in the proposal to No Kid Hungry, the intention is that this study “will act as the foundation to provide solutions to many issues faced by the current food system.” Anticipated solutions referenced include:

- Creation of a local, equitable food initiative to empower and revitalize diverse communities of eastern Montana through collaboration and positive changes in the food system.
- Support local, regional, family-scale, and sustainable food production as a means for community food security (i.e., “reducing food insecurity and shrinking food deserts”).
- Increasing distribution of Montana-grown food to the region, diversifying the local economy and sustaining/reinvigorating the region's agricultural heritage while simultaneously supporting the creation of new jobs in the region.

The core objectives of this Regional Food Economy Study were two-fold. First: document what currently exists, specifically: food system infrastructure; assets, opportunities, barriers and challenges; community members’ interest in local foods, regional food systems, and what they need/want; and social/cultural factors that influence food system development. Second: outline potential practical solutions that are informed by study findings.

The Regional Food Economy Study is intended to guide and inform Eastern Montana FADC work in this 11-county region. It is a resource, neither prescriptive nor — given the breadth of research — fully comprehensive.

Defining “Regional Food System”

Several definitions are used to describe the food production, processing, distribution, consumption and waste recovery that occur in “regional food systems”, “local food systems”, “community-based food systems”. In a nutshell, these terms and others are used to describe food pathways that exist separate from and/or interwoven with this nation’s dominant commercial food systems.

During this study and for the purposes of this report, the project team cited the USDA definition of a regional food system as “place-specific clusters of agricultural producers of all kinds—farmers, ranchers, fishers—along with consumers and institutions—engaged in producing, processing, distributing, and selling foods." (Source: USDA, 2015)

Another concise definition is offered by Jack Kloppenberg, a rural sociology professor at the University of Wisconsin-Madison, who describes “self-reliant, locally or regionally based food systems [as] comprised of diversified farms using sustainable practices to supply fresher, more nutritious food stuffs to small-scale processors and consumers to whom producers are linked by the bonds of community as well as economy.”[1]

Farm-to-Table Store in Glendive, Montana. September 2021.

[1] Social theory and the de/reconstruction of agricultural science: a new agenda for rural sociology. 1991. Jack Kloppenberg in Sociologia Ruralis 32(1), 519-548, McGinnis M V (ed).

Methods

This five-month study included several phases beginning in August 2021.

Phase 1: Initial Kick Off (August 2021)

Initial Kick Off: Reviewed initial documents provided by GNDC and EPEDC to build on an understanding of the breadth of the project. Met with GNDC and EPEDC to refine and coordinate the proposed work plan.

Phase 2: Initial Audit, Internal Workshop and Finalized Strategic Approach (September 2021)

Phase 2A: Initial Audit
Reviewed reputable sources to determine which information could be gleaned from secondary sources to answer questions regarding distribution; sustainability; economic diversification; and food insecurity.

Phase 2B: Internal Workshop
Conducted a workshop in Wolf Point, Montana at the GNDC offices with 14 participants (nine in-person and five via Zoom) to better understand the existing regional food economy landscape.

The objective of this workshop was to gather a small, knowledgeable group who represent various communities and perspectives to hear information that couldn't be gathered from published reports or other data. Group discussion informed and affirmed research priorities. Workshop topics included:

- ☐ **What exists:** What infrastructure, businesses, entrepreneurs, investors, and/or other assets exist? What parts of the existing food chain could be partners in the development of new local food/ag businesses?
- ☐ **What would you like:** What are the ways to get food, the types of food, and the kinds of food-related businesses that you want people/families to have access to throughout different seasons? What types of added-value ag-related businesses would you want to have and/or expand upon?
- ☐ **What is needed:** What are the biggest opportunities? What needs to be in place, what barriers need to be navigated, for those opportunities to become reality?

Phase 2C: Finalized Strategic Approach: After the Initial Audit and the Internal Workshop, finalized the strategic approach as outlined below on how to uncover information still needed.

Phase 3: Secondary and Primary Research (September to December 2021)

Phase 3A: Secondary Research
Reviewed more than 20+ sources of existing data, related studies and literature to understand distribution; sustainability; economic diversification; food insecurity; and other insights that GNDC and EPEDC wanted to understand. See Appendix—Resources.

Phase 3B: Qualitative Field Research
Facilitated and conducted one-on-one conversations with key contacts throughout the region. Conducted more than 50 in-person and via phone interviews, as well as in-region observations and market basket studies.

Drafted discussion guides used to direct the one-on-one conversations, as well as an email and/or phone script used to arrange for the interviews. Did not offer participants an incentive to participate in these conversations.

Conducted interviews with the following audiences, throughout the 11 counties:

- Producers
- Processors
- Distributors
- Grocers
- Restaurants/food trucks
- Institutions (schools/hospitals)
- Food pantries/banks
- Prospective entrepreneurs/investors
- Extension agents and other 'connectors' who work across food system sectors

Conducted 20 market basket studies in every county throughout the region, using the following study as a guide and inspiration: Montana Food Distribution Study, Challenges and Opportunities for Grocers in Rural and Tribal Communities, prepared in November 2020 by Native Ways Today LLC, Linda Howard and Mariah Gladstone, on behalf of Montana Cooperative Development Center, Native American Development Corporation, and National Center for Appropriate Technology.

In-person interviews, in-region observations and market basket studies were conducted on three separate occasions: Sept. 19-20, 2021; Oct. 12-15, 2021; and Dec. 2-3, 2021.

Phase 3C: Qualitative Online Survey
Gathered information from nearly 350 regional residents including more than 40 regional producers via a qualitative online survey that included both close-ended and open-ended questions. Given the qualitative nature of the survey, the results should be considered directional and insightful but not a true representative sample of the area's population.

Worked with GNDC and EPEDC to distribute the online survey via multiple communication channels: featuring the survey in the FADC monthly newsletter; sharing it with the board of directors; asking the greater FADC network to distribute it via email; promoting it at relevant events and gatherings; asking the Fort Peck Tribal Council members to distribute it via email; posting it to social channels; posting a link to the survey on the GNDC and EPEDC websites; and distributing a press release to local media. An Eastern Montana FADC representative also talked about the project on a local radio station.

To encourage participation, respondents were offered an option to enter their name and email address into a random drawing for one of five $100 VISA gift cards.

Phase 4: Actionable Insights and Regional Food Economy Study Report (November to December 2021)

Evaluated and analyzed the data and distilled the research findings into actionable insights including key takeaways, resulting in this report.

Clarification Notes

This study did not assess or evaluate non-edible crops and non-edible value-added products being produced in the region including flowers, wool, leather, etc.

Kelley Bean Company elevators in Terry, Montana. September 2021.

Agricultural & Demographic Trends/Data

Secondary data was captured to provide context and information as to what is happening in the region. Highlights are included below.

Agriculture Trends in NE/E Montana

Local Food Produced Being Consumed in State. The 2017 USDA Census noted that the value of food sold by farmers and ranchers directly to consumers in Montana was $9.8 million—less than 3% of the $3.5 billion market value of total Montana agricultural products. Sales of food produced in Montana sold directly to consumers per capita was $9.22, higher than Washington ($9.10), Wyoming ($6.08), North Dakota ($4.38) and South Dakota ($3.80), but lower than Idaho ($15.96).

However, when it comes to the value of agricultural products sold by farmers and ranchers directly to local retail markets, institutions or food hubs, Montana was behind its neighboring states when looking at those sales per capita. Retail, institution and food hub sales per capita in Montana was $8.67, significantly lower than Washington ($81.58), Idaho ($48.77), Wyoming ($32.10) and North Dakota ($24.65), but higher than South Dakota ($7.54). Sources: USDA, Table 2. Market Value of Agricultural Products Sold Including Food Marketing Practices and Value-Added Products: 2017 and 2012, 2019 Locavore Index

Number of Farms and Ranches. There are 3,905 farms and ranches in the 11-county region, a 12% decrease from the previous census. Per the USDA, the farms and ranches included in this number are all of the agricultural operations that have (or the potential to have) $1,000 or more in agricultural sales. As of 2017, the highest number of farms and ranches per county was Valley County with 557 operations noted. Roosevelt County had 501, and Dawson County had 487. Dawson County was the only county that saw an increase in the number of farms in the region between 2012 and 2017; however that change accounted for less than 1% and would be considered to be insignificant. Wibaux County had the largest decrease in the number of farms and ranches (-26%), followed by Daniels (-22%) and Roosevelt (-21%). Source: USDA, Montana Annual Bulletin 2021

Land in Farms and Ranches: Number of Acres. The 11-county region has more than 13.4 million acres in farmland and ranchland, a slight decrease (1%) from the 2012 census. In 2017, Garfield County had the highest number of acres in farms and ranches with more than 2.2 million acres. Other counties with at least 1.3 million acres include: Carter County (1.8 million), Valley County (1.6 million); McCone County (1.3 million), and Roosevelt County (1.3 million). The counties of Roosevelt, Sheridan, Garfield and Daniels all saw a slight increase in the number of acres in farms and ranches from 2012 to 2017, the most significant being Roosevelt County with an increase of 5%. Interestingly, Dawson County saw the greatest decrease (-11%) in the number of acres in farms and ranches; yet it was also the one county that saw an increase in the number of farms and ranches (but less than 1%). Source: USDA, Montana Annual Bulletin 2021

Average Size of Farms and Ranches. As of 2017, Garfield County had a significantly larger average size of farms and ranches than the rest of the region with an average of 8,519 acres

per farm/ranch. Carter County's average farm/ranch size was 5,473 acres; and Prairie County's average farm/ranch size was 4,175 acres. Sheridan County and Dawson County had the smallest average number of acres per farm/ranch at 2,323 acres and 2,326 acres respectively. Comparing 2017 to 2012, every county but two saw an increase in the average size of farms/ranches. The largest increases in average farm/ranch size were experienced in the following counties; Roosevelt (22%), Daniels (18%), Wibaux (16%), Sheridan (15%) and Valley (15%). Both Dawson County (-12%) and Fallon County (-6%) saw decreases. Source: USDA, Montana Annual Bulletin 2021

Number of New and Beginning Producers. There were 1,007 new and beginning producers in 2017. These producers, as defined by the USDA, were principal producers with less than 11 years on any operation. The numbers of new and beginning producers reported by the USDA for 2012 and 2017 are not easily comparable as 2012 numbers were defined as less than 10 years on any operation. However, even with the discrepancies in numbers, it appears that there are new and beginning producers in almost every county as of 2017. The counties with the highest number of new and beginning producers in 2017 include: Richland (160); Valley (159), Dawson (131), McCone (110), and Fallon (108). Wibaux County has the fewest number of new and beginning producers (17), and its numbers were the same as 2012. McCone County was the only county that saw a decrease from 122 in 2012 to 110 in 2017; again, these numbers should be considered directional due to the different criteria reported by USDA between the two years. Sources: USDA, National Agricultural Statistics Service, 2012, USDA, National Agricultural Statistics Service, 2017. 2012: Defined as less than 10 years on any operation. 2017: Defined as principal producers, less than 11 years on any operation.

Farm/Ranch Employment. Carter County has the highest percentage of farm/ranch jobs as a percent of total employment with 43% employed on farms and ranches, followed by Garfield County (37%) and McCone (36%). In Carter County, McCone County and Garfield County, farm and ranch proprietors also make up the greatest percent of farm and ranch employment (29.7%, 29.6% and 28.4% respectively). The counties with the lowest percentage of farm and ranch jobs are Roosevelt (12%) Dawson (9%) and Richland (8%). Source: Headwaters Economics, Using U.S. Department of Commerce, 2021 Bureau of Economics Analysis, Regional Economic Accounts, Washington, D.C.

Government Payments by County. In 2019, Sheridan County had the highest amount of government payments, totaling more than $18 million. The county also had the highest increase of payments year-over-year (31%). Wibaux County and Fallon County had the lowest amount of government payments in 2019, with $2.1 million and $2.8 million respectively. The biggest year-over-year change in government payments was the nearly 135% decrease seen in Garfield County from $10.5 million in 2018 to less than $4.5 million in 2019. In 2019 government payments to agriculture operators included countercyclical programs such as Price Loss Coverage (PLC) and Agricultural Risk Coverage (ARC); marketing loan programs such as the Loan Deficiency Program (LDP) and marketing loan gains (MLG); conservation program payments made to those participating in the Conservation Reserve Program (CRP), Environmental Quality Incentive Program (EQIP); and Conservation Stewardship Program (CSP); and other government programs including the Market Facilitation Program (MFP), and disaster and other emergency programs. Sources: USDA, Montana Annual Bulletin, 2020, USDA, Montana Annual Bulletin, 2021, USDA Economic Research Service

Imputed and Miscellaneous Income Received by County. Another component of income to consider is the amount of imputed and miscellaneous income farmers and ranchers receive, defined by the Bureau of Economic Analysis as "the value of home consumption and other farm/ranch related income components, such as machine hire and custom work income and income from forest products." Every county in the Eastern Montana FADC region except Roosevelt County saw an increase in imputed and miscellaneous income from 2017-2018 to 2019-2020. Source: Bureau of Economic Analysis

Market Value of AG Products Sold. In looking at the region, Richland County had the highest market value of agricultural products sold, totaling $100 million, in 2017. Valley County had a total of $97 million, followed by Sheridan County with $71 million. The lowest market value of agricultural products was in Wibaux County with $18 million. Comparing 2017 to 2012, Daniels County saw the largest decrease at 125%, going from $95 million to $42 million. The only county that saw an increase from 2012 to 2017 was Prairie County, increasing 28% from $31 million in 2012 to $43 million in 2017. Sources: USDA, National Agricultural Statistics Service, 2012, USDA, National Agricultural Statistics Service, 2017

Average Market Value of AG Products Sold per Farm/Ranch. Prairie County had the highest average market value of agricultural products sold per farm/ranch with an average of $242,000 in 2017, followed by Carter County with an average of $219,000 and Garfield County with an average of $210,000 per farm/ranch. Prairie County and Carter County were the only two counties that saw an increase in average market value of agricultural products per farm/ranch, comparing 2017 to 2012. Prairie County increased 31% and Carter County increased 88% in the average market of ag products per farm/ranch. The biggest decreases seen in the average market of ag products per farm/ranch, when comparing 2017 to 2012, were in Daniels County (-85%), Roosevelt County (-63%) and Sheridan County (-60%). Sources: USDA, National Agricultural Statistics Service, 2012, USDA, National Agricultural Statistics Service, 2017

Realized Net Farm/Ranch Income by County. When looking at 2019, Richland County had the highest realized net farm/ranch income ($27.6 million), followed by Prairie County ($5.8 million) and then Carter County ($3.6 million). Multiple counties in 2019 had negative realized net farm/ranch income, the highest being Sheridan County with -$12.4 million. Dawson County had $1.4 million in realized net farm/ranch income in 2019 but the most significant increase over 2018. Sources: USDA, Montana Annual Bulletin, 2020, USDA, Montana Annual Bulletin, 2021

Population Trends in NE/E Montana

Changing Rural Landscape. As noted by Benjamin Winchester, Rural Sociologist, Extension Center for Community Vitality from the University of Minnesota in his September 2021 presentation, "Rewriting the Rural Narrative", the rural landscape is changing but not dying. When newcomers arrive in Montana, their reasons include: moved primarily for a job (35%) and lived previously in the community (28%).

Population. More than 42,000 people live in the counties served by the FADC. Although many of the population increases from 2010 to 2019 are either not reliable and/or not statistically significant, all of the 11 counties but two experienced population increases. Garfield County saw a 15% decrease, making it the county with the smallest population in the area with 1,036

people, and Sheridan saw a decrease of less than 1%. The largest reliably attributed increase was experienced in Roosevelt County (9%) which also has the largest number of residents (11,175). Although noted as unreliable, Prairie County increased by 15%, reflecting a population size of 1,252 people as of 2019. Source: Headwaters Economics

Median Age. The median age for every county either decreased or stayed the same between 2010 and 2019. Roosevelt County had the youngest median age at 30.2 years old, followed by Fallon County at 39.3 years old. The greatest decrease in median age was in Prairie County changing from 55.5 years old in 2010 to 48.7 years old in 2019. The county with the highest median age in 2019 was Daniels County at 49.2 years old, which did not change from 2010. Source: Headwaters Economics

School Enrollments. School enrollments for the last eight years have experienced a variety of trends, depending on the county. The counties experiencing upward trends since the 2013-2014 school year through the 2020-2021 school year include: Carter (165 students in 2020-2021 vs. 121 students in 2013-2014); Daniels (279 students in 2020-2021 vs. 267 students in 2013-2014); and Fallon (572 students in 2020-2021 vs. 541 students in 2013-2014).

The counties with decreasing trends in school enrollments since the 2013-2014 school year include: Dawson (1,230 students in 2020-2021 vs. 1,342 in 2013-2014); McCone (230 students in 2020-2021 vs. 258 in 2013-2014); Sheridan (496 students in 2020-2021 vs. 564 in 2013-2014); and Valley (1,165 students in 2020-2021 vs. 1,258 in 2013-2014).

Other county school enrollments have fluctuated since 2013, having both highs and lows including: Garfield (186 students in 2020-2021 vs. a low of 159 students in 2017-2018); Prairie (138 students in 2020-2021 vs. a high of 159 students in 2015-2016); Roosevelt (2,467 students in 2020-2021 vs. a high of 2,592 students in 2016-2017); and Wibaux (154 students in 2020-2021 vs. a low of 132 students in 2018-2019). Source: Montana Office of Public Instruction

Graduation Rates. The counties all experience a high percentage of high school graduation rates with Garfield County at the highest (97%) and Roosevelt County and Prairie County with the lowest (88%). The average across all of Montana is 94% in comparison. Source: Headwaters Economics

Economic Performance Trends in NE/E Montana

Unemployment. After the impacts of COVID-19 in 2020, unemployment trends in 2021 are nearing the lower 2017 levels for the region. Comparing unemployment rate statistics in July 2021, Roosevelt County had the highest unemployment rate at 4.8%, followed by Richland County (4.2%). The lowest unemployment rates in the 11-county region were in McCone (2.0%), Daniels (2.1%) and Fallon (2.4%). Sources: Headwaters Economics, Bureau of Labor Statistics

Median Household Income. The county in the area served by the FADC with the highest median household income is Fallon County at $64,545, followed by Dawson County ($58,596). The lowest median household incomes are in Roosevelt County ($43,194) and Prairie County ($43,625). Source: Headwaters Economics

Labor Force. There are nearly 20,000 people in the labor force within the 11-county region, but those numbers have declined in every county but one since 2019. Garfield County has seen the sharpest decline with a 10% decrease, followed by Wibaux County (-8%). Sheridan County saw a slight increase of 1%. The total decrease in the labor force for the area served by the FADC is 4% since 2019. Source: Bureau of Labor Statistics

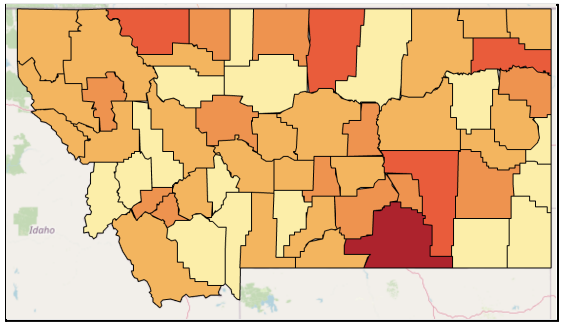
Health Trends in NE/E Montana

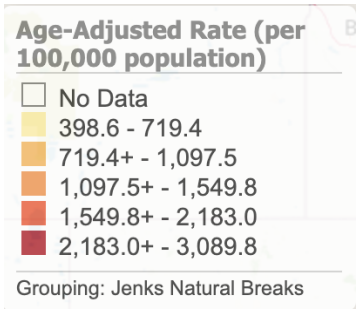
Although extensive health data is not available at the county-wide level for this region, a few points of data were accessed to provide some context.

People without Health Insurance. 12.3% of the area's population did not have health insurance in 2019. Source: Headwaters Economics

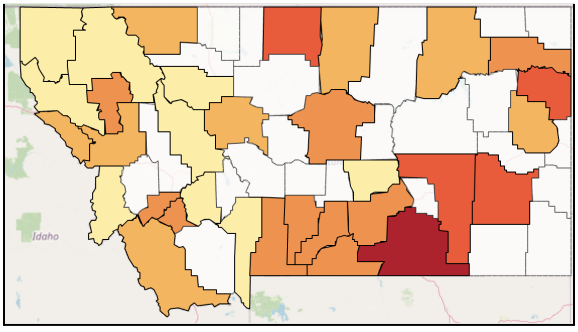
Diabetes Hospitalization Rate and Heart Failure Hospitalization Rates, 2012-2014. Data from the Montana Department of Public Health and Human Services shows that each county in the region had a minimum of an estimated 400 diabetes inpatient hospitalization age-adjusted rates per 100,000 people from 2012-2014. The diabetes inpatient hospitalization age-adjusted rate per 100,000 people shows the highest concentration in Roosevelt County with a range of an estimated 1,550 to 2,183. Sources: MT Public Health Information System: Diabetes, MT Public Health Information System: Heart Failure, Montana Hospital Discharge Data System, Office of Epidemiology and Scientific Support, Montana Department of Public Health and Human Services, Helena, MT 59620 http://dphhs.mt.gov/publichealth/Epidemiology

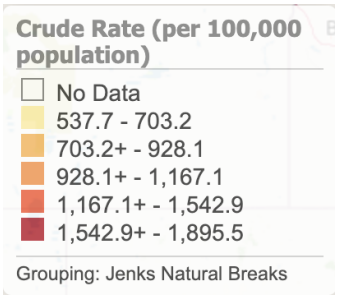
Diabetes Hospitalization Rate, 2012-2014





Heart Failure Hospitalization Rate, 2012-2014





Poverty and Food Access Trends in NE/E Montana

Poverty Rate. According to the U.S. Census, American Community Survey, during the 2015-2019 period, Roosevelt County had the highest number of individuals (28.3%) and families (24.4%) living below poverty. Daniels County had the lowest number of individuals (4.8%) and families (4.4%) living below poverty. Source: Headwaters Economics

SNAP Recipients. Fewer people in the 11-county region were receiving Supplemental Nutrition Assistance Program (SNAP) benefits in June 2021 than in June 2017. The highest number of recipients of SNAP benefits in June 2021 lived in Roosevelt County (3,031) but the number had decreased 6% since June 2017. The most significant decreases during that time period were Prairie County (57% decrease), Fallon County (31% decrease), and Valley County (24% decrease). Four counties had an increase in the number of SNAP recipients with Carter County (15% increase) and Daniels County (10% increase) being the most significant. The counties with the least amount of SNAP recipients were Carter (27) and McCone (26), both of which were trending up. Source: Kids Count

Food Insecurity Projections. Feeding America assessed and projected the increase in food insecurity rates across the U.S. on a county level based on the impacts of COVID-19. A total of 5,260 people in the area served by FADC were projected to experience food insecurity, between 2019 to 2020, with every county expecting to experience an increase. Interestingly, although not included in the 5,260 total, Richland County had the highest level of projected increase of food insecurity, both in the region and in the state of Montana at 38%. Counties serviced by FADC with the highest projected levels were Sheridan County (27%) and Dawson County (26%). The lowest projected increases were in Carter County (7%), followed by Roosevelt (11%), and Valley County (14%). Feeding America also projected the impacts of COVID-19 on food insecurity for children with an estimated number of 2,100 expected to be impacted in the 11-county region. The greatest increase in the number of children projected were in the following FADC counties: Dawson (33%); Sheridan (30%); Fallon (28%) and McCone (23%). Source: Feeding America: The Impact of Coronavirus on Food Insecurity

Produce at Reynolds Grocery Store in Glasgow, Montana. December 2021.

Current Food System Infrastructure

For this Regional Food Economy Study, the project team researched and documented as many examples as possible within the timeframe of the project to outline what currently exists within the region's food system infrastructure—everything from production to partners and collaborators.

SECTION 1: PRODUCTION

1. PRODUCTION

The 11-county region produces a significant amount of agricultural products. The majority is raised or grown as commodities, and travels out of state with little to no value added. This section outlines production; processing is outlined in Section 4: Processing.

a. Operations by Type

Beef cattle ranch and farm operations are the most common type of farm in the 11-county region with Carter County having the highest number of cattle operations (230). Below are the number of operations by type in each county, based on 2017 data from the USDA (with the Eastern Montana FADC county having the highest number noted in parentheses). It's important to mention that observations and information gathered in Fall 2021 noted increased numbers of some types of productions—i.e., greenhouses, fruit and nut tree farms, etc.—and the 2022 USDA Census will provide more accurate information once it's available.

Total # of Beef Cattle Ranch & Farm Operations:	1,536 (Carter County = 230)
Total # of Other Crop Farming Operations:	1,061 (Valley County = 195)
Total # of Oilseed & Grain Farming Operations:	919 (Sheridan County = 225)
Total # of Other Animal Prod & Aquaculture Operations**:	281 (Fallon County = 50)
Total # of Sheep & Goat Production Operations:	62 (Carter County = 14)
Total # of Cattle Feedlots Operations:	19 (Dawson County = 6)
Total # of Hog & Pig Farming Operations:	11 (Dawson County = 4)
Total # of Vegetables & Melon Farming Operations:	5 (Carter, Daniels, Dawson, Prairie and Sheridan = 1 each)
Total # of Poultry & Egg Production Operations:	5 (Dawson County = 3)
Total # of Fruit & Nut Tree Farming Operations:	3 (Valley County = 3)
Total # of Dairy Cattle & Milk Prod Operations:	2 (Garfield County = 2)
Total # of Greenhouse, Nursery Operations:	1 (Valley County = 1)

The chart below shows types of farms by county with some numbers bolded to indicate the counties with the highest numbers of farm types, using data obtained from Headwaters Economics.

Table 01. Types of Farms by County. Source: Headwaters Economics

	Carter	Daniels	Dawson	Fallon	Garfield	McCone	Prairie	Rich-land*	Roosevelt	Sheridan	Valley	Wibaux	Total (not including Richland)
All Farms (2017)	323	277	487	289	260	437	179	**527**	501	458	**557**	137	3,905
Oilseed & Grain Farming	6	89	83	14	17	139	11	75	161	**225**	**161**	13	919
Vegetable & Melon Farming	**1**	**1**	**1**	0	0	0	**1**	**2**	0	**1**	0	0	5
Fruit & Nut Tree Farming	0	0	0	0	0	0	0	0	**2**	0	**1**	0	3
Green-house, Nursery	0	0	0	0	0	0	0	**2**	0	0	**1**	0	1
Other Crop Farming	42	128	121	61	42	115	42	**197**	172	120	**195**	23	1,061
Beef Cattle Ranch & Farm	**230**	50	**217**	162	162	154	116	191	127	84	155	79	1,536
Cattle Feedlots	4	1	**6**	0	2	0	0	**9**	0	1	4	1	19
Dairy Cattle & Milk Prod	0	0	0	0	**2**	0	0	0	0	0	0	0	2
Hog & Pig Farming	0	0	**4**	1	0	1	1	0	2	**2**	0	0	11
Poultry & Egg Production	0	0	**3**	0	0	0	0	0	0	0	0	**2**	5
Sheep & Goat Production	**14**	1	4	1	**11**	8	3	4	6	2	8	4	62
Other Animal Production & Aqua-culture**	26	7	**48**	**50**	24	20	5	47	31	23	32	15	281

**Please note that all but one of these “Other Animal Productions & Aquaculture” farms are not related to aquaculture. As defined by Headwaters Economics: “Establishments classified as Other Animal Production are primarily engaged in raising animals and insects (except cattle, hogs and pigs, poultry, sheep and goats, and aquaculture) for sale or product production. These establishments are primarily engaged in one of the following: bees, horses and other equine, rabbits and other fur-bearing animals, etc., and producing products such as honey and other bee products. Establishments primarily engaged in raising a combination of animals with no one animal or family of animals accounting for one-half of the establishment’s agricultural production are included in this industry group.”

SECTION 1: PRODUCTION (CONT'D)

b. Livestock

In January 2021, the 11-county region had an inventory of 466,800 cattle and calves, 46,100 sheep and lambs, and more than 200 hogs and pigs. The area also had an unknown number of milk cows and heifers that have calved due to that data being withheld to avoid disclosing data from individual operations. Carter County and Garfield County had higher inventories of cattle and calves as well as sheep and lambs than the rest of the region. Garfield and Roosevelt were the only counties with disclosed numbers of hogs and pigs. Source: USDA, Montana Agricultural Bulletin, 2021

Table 02. Livestock Inventory by County, 2021

	Jan. 2021 All Cattle & Calves	Jan. 2021 Beef Cows & Heifers That Have Calved	Jan. 2021 Milk Cows & Heifers That Have Calved	Jan. 2021 All Sheep & Lambs	Dec. 1, 2020 Hogs & Pigs
Carter	**89,000**	**52,000**	(D)	**19,000**	(D)
Daniels	14,000	10,900	(D)	300	(D)
Dawson	35,500	23,500	(D)	1,900	(D)
Fallon	45,000	27,500	(D)	2,000	(D)
Garfield	**72,000**	**45,000**	(D)	**11,500**	**100**
McCone	39,500	(D)	(D)	7,600	(D)
Prairie	47,000	22,500	(D)	900	(D)
Richland*	62,000	31,500	(D)	4,200	(D)
Roosevelt	26,500	19,000	(D)	500	**100**
Sheridan	17,300	(D)	(D)	400	(D)
Valley	61,000	(D)	(D)	500	(D)
Wibaux	20,000	(D)	(D)	1,500	(D)
Total (not including Richland)	466,800 Cattle & Calves	200,400+ Beef Cows & Heifers That Have Calved (plus withheld data)	Data withheld to avoid disclosing individual data	46,100 Sheep & Lambs	200+ Hogs & Pigs (plus withheld data)

(D) = "Withheld to avoid disclosing data for individual operations," as defined by the Montana Annual Bulletin, 2021, USDA, National Agricultural Statistics Service.

SECTION 1: PRODUCTION (CONT'D)

c. Crops: Pulses, Grains, Oilseeds, Etc.

The following crops are being produced in the 11-county region: spring wheat; canola; durum wheat; dry peas; lentils; winter wheat; barley; oats; and chickpeas. Valley County and Roosevelt County produced the highest amount of spring wheat in 2020; Daniels County was the top producer of durum wheat; and dry peas and lentils were most prevalent in Sheridan County. Valley County was the top producer of canola and the only county listed with chickpea production. Many of the counties did not have data available to avoid disclosing information about individual operations. Source: USDA, Montana Agricultural Bulletin, 2021

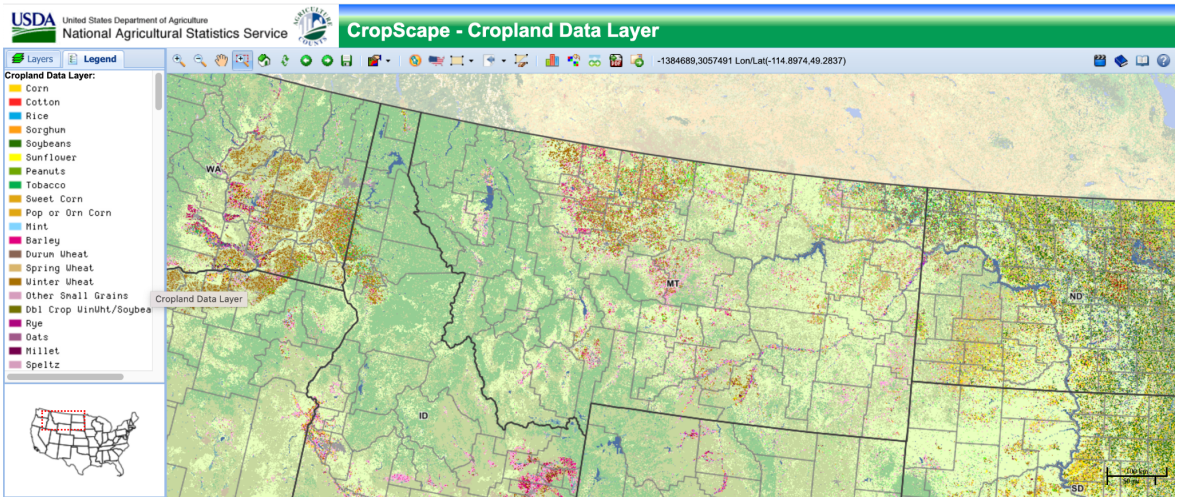
Table 03. Crop Production by County, 2020

	Winter Wheat (Bushels)	Spring Wheat (Bushels)	Durum Wheat (Bushels)	Barley (Bushels)	Oats (Bushels)	Dry Peas (Cwt)	Chick-Peas (Cwt)	Lentils (Cwt)	Canola (Pounds)
Carter	301,000	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Daniels	N/A	7,538,000	4,620,000	N/A	N/A	624,000	N/A	660,000	19,400.000
Dawson	N/A	6,533,000	N/A	N/A	N/A	394,000	N/A	N/A	N/A
Fallon	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Garfield	N/A	2,509,000	N/A	N/A	N/A	N/A	N/A	N/A	N/A
McCone	258,000	8,266,000	N/A	N/A	N/A	773,000	N/A	N/A	N/A
Prairie	187,000	671,000	N/A	N/A	N/A	70,200	N/A	43,000	N/A
Richland*	N/A	5,534,000	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Roosevelt	N/A	11,424,000	N/A	179,000	N/A	N/A	N/A	443,000	N/A
Sheridan	N/A	N/A	N/A	N/A	N/A	1,303,000	N/A	970,000	20,380,000
Valley	N/A	13,562,000	1,356,000	N/A	82,400	931,000	54,000	618,000	27,200,000
Wibaux	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
TOTAL w/o Richland	746,000 bushels	50.5 million bushels	5.9 million bushels	179,000 bushels	82,400 bushels	4.1 million cwt	54,000 cwt	2.7 million cwt	47.6 million pounds

N/A = "Counties with no acres planted or counties that are combined into 'Other' counties/districts to avoid disclosure of individual information," as defined by the Montana Annual Bulletin, 2021, USDA, National Agricultural Statistics Service.

Visual of Crops Produced in the Region

Source: [USDA, CropScape—Cropland Data Layer]



d. Vegetables

According to the USDA 2017 Census, very little land throughout the region is used for "vegetables and vegetables harvested for sale" as defined by the USDA. The following counties each had one farm that was categorized as "in-the-open vegetable operation with area in production" during the USDA 2017 Census: Carter, Daniels, Dawson, McCone, Prairie and Sheridan. Valley County had two such vegetable operations, as did Richland County. The USDA 2017 Census also showed that there were no "in-the-open vegetable operations with area in production" in Fallon, Garfield, Roosevelt and Wibaux. Source: [USDA, National Agricultural Statistics Service, 2017]

Community-scale vegetable production information is captured below including mixed-crop produce farms (h), community gardens (i), and greenhouses (j). Information about individual gardens was not captured.

e. Fruits, Nuts and Berries

There are only a few orchards in the region, as categorized by the USDA 2017 Census as "operations with area bearing and non-bearing." Counties with land in orchards include Roosevelt County with two operations and Prairie County and Valley County with one operation each. Items being grown include apples and sweet cherries. Roosevelt County also has one operation with land in berries, according to the USDA 2017 Census. Dawson County also had one operation with land in berries noted in the 2012 Census, but no operations were reported in 2017. Source: [USDA, National Agricultural Statistics Service, 2017]

In 2018 and 2019, Hatchett Creek Farms, located in Fallon, planted apples trees and berry bushes as noted on its website: "In 2018, several hundred apple trees were planted on the farm and that was followed up with one hundred more apple trees as well as a great deal of berry bushes in 2019." Source: [Hatchett Creek Farms]

f. Aquaculture

According to the 2017 USDA Census, there is one operation in the region, located in Valley County, that is categorized as a farm with aquaculture sold under the categories of trout and/or sport or game fish. Source: USDA, National Agricultural Statistics Service, 2017

g. Bees

- More than 25 apiaries in the region have registered with the Montana Department of Agriculture with many of the apiaries having locations in more than one county, and there are 11 farms in the 11-county region with recorded honey sales. Sources: Montana Department of Agriculture, USDA, National Agricultural Statistics Service, 2017
- McCone County had the highest number of farms with honey sales (4), according to the 2017 USDA Census. Other counties noted by the USDA as having farms with honey sales include: Richland (3), Carter (2), Daniels (2), Roosevelt (2) and Dawson (1). Source: USDA, National Agricultural Statistics Service, 2017
- One example of an apiary producing and selling locally is Huseby Apiary that sells High Prairie Bouquet honey out of Circle to the Farm-to-Table store in Glendive. Another example is Big Sky Honey from Fairview, also being sold at the Farm-to-Table store.

h. Mixed-Crop Produce Farms

- Hatchett Creek Farm. Produce available during the growing season at 4-corners Convenience Store in Terry; weekly at a road-side stand in Baker; weekly on-site, a few miles outside of Fallon.
- Across the border in North Dakota, mixed-crop produce farms also raise livestock for local production.
    - Rolling Hills Farm (Beach, ND) offers a CSA (Community Supported Agriculture[2]); produces heirloom vegetables, free-range chicken eggs, grass-fed lamb & beef; and "is committed to helping others learn how to grow their own food and get the very most out of their garden!"
    - Turtle Cove Farm (Williston, ND) offers a CSA; produces chemical-free, non-GMO fruits and vegetables, plus mixed dairy goats, Icelandic sheep, and free range chickens.

[2] Community Supported Agriculture (CSA) is a production and marketing model whereby community members buy shares of a farm's harvest in advance. Typically, CSA shareholders receive weekly (or monthly/seasonal) boxes of produce, meat, and/or other farm products. For a more detailed description, visit https://www.nal.usda.gov/legacy/afsic/community-supported-agriculture.

SECTION 1: PRODUCTION (CONT'D)

i. Community Gardens

- Glendive. Glendive Community Garden is currently run by Jackie Stinnett. Cherry tomatoes for Beaver Creek Brewery sourced from here. Also in the works, with partners: an urban forest, with fruit trees.
- Glasgow. Community gardens at Milk River Activity Center built 2011. Produce raised goes to the community; in 2014, produce went to the local food bank, senior center, and Women's Resource Center. Glasgow Courier, 7/2/2014.
- Hinsdale. Run by FFA advisor Patti Armbrister. Farm to Cafeteria/success story.
- Wolf Point.
    - A new greenhouse constructed with FFA at Wolf Point High School. Northern Plains Independent, 9/2/2021. In addition to using this facility for education, reports suggest they intend to sell what is grown to support the program.
    - Reports that a garden near the park has been managed by someone at the school in past years. Unclear if this is the same or different from reports that Wolf Point Community College used to manage a huge garden, with produce going to the food bank and farmers' market.
- Fairview. Farm to School/sweet corn success story. Hope to build a greenhouse.
- Plevna. Plevna FFA and Plevna Schools began construction of school gardens in May 2020. By August, harvest of produce to use in school lunches had begun. Fallon County Times, 8/28/2020.
- Plentywood. Plentywood Lutheran Church has built 8-10 raised beds for community use.

j. Greenhouses

- A list of greenhouses compiled from word-of-mouth, on-site visits, Google searches, interviews and news articles appears below.

Table 04. List of Known Greenhouses in Region

Name	Location	Notes
Hatchett Creek Farm	Terry	David Graham.
In My Plants	Jordan	Larry Pat Murnion. Grows starts, plants, flowers, vegetables. Sell produce via Ryan Grocery.
Barkley's Home Grown Greenhouse	Baker	Will start selling in 2022. Geothermal greenhouse, built partially underground.
Beaver Creek HomeGrown	Ekalaka	Bruski Family.
Little Red Greenhouse	Ekalaka	Doug Marsten. Starts.
Beaver Creek Gardens	Ekalaka	
off-shoot from Beaver Creek Garden	Ekalaka	2020 was first year
Glendive Community Garden High Tunnels	Glendive	One at community garden, one to be placed at correctional facility.
Dawson County High School greenhouse complex	Glendive	2014: "plans call for four buildings: two 72-foot-by-30-foot polycarbonate-sided greenhouses; a 30-foot-by-24-foot metal-sided head house; and a 20-foot-by-60-foot shade house" Dawson County News 3/4/2014
Bloom & Vine	Glendive	Greenhouse with coffeehouse, eatery & evening wine bar.
Friesen's Floral & Greenhouse	Wolf Point	Primarily flowers.
Cleo's Green Acres	Wolf Point	Incorporated May 2019.
Eileen's Place	Fort Peck	Greenhouse, per Google listing.
Fort Peck Community College Greenhouse	Poplar	FPCC Dept of Ag Tribal Journal 11/15/2005
Jensen Gardens, LLC	Scobey	Primarily starts, flowers. New FaceBook page, April 2021.
Patty's Greenhouse	Glasgow	Two greenhouses, run by Patty's Floral & Greenhouse (Malta)
Yellowstone Valley Greenhouse	Sidney	Google Listing

SECTION 1: PRODUCTION (CONT'D)

k. Estimates on Number of Organic and Conventional Farms

- There were a total of 16 farms in the region (including Richland County) with total organic product sales, as defined by the USDA, as of the 2017 Census. Richland County has eight operations that fit that category; Sheridan County has three; and the following counties each have one: Carter, Daniels, Prairie, Roosevelt and Valley. Not including Richland County, there are eight organic operations within the 11-county region. Source: USDA, National Agricultural Statistics Service, 2017
- Certified organic farming makes up a small percentage of the total number of farms in the region; however, anecdotally, several farmers and ranchers who were interviewed noted that they incorporate organic practices but are not seeking the certification.
- The total number of farm operations in the 11-county region, as of the 2017 USDA Census, was 3,905 (not including Richland County).

l. Farmers and Ranchers with Demonstrated Interest in Local/Regional, Sustainable, Regenerative Agriculture

There are farmers and ranchers throughout the region who have a demonstrated interest in local/regional, sustainable and regenerative agriculture. Below are several organizations and online resources that list the area's farmers and ranchers who are participating in these practices.

- Eastern Montana Regenerative Agriculture – contact: Barkley's Home Grown, LLC
- Made in Montana – listing
- Abundant Montana – directory and map
- Montana Organic Association – organic business and resource directory
- Montana Local Food Challenge – Local Food Map

SECTION 2: TRANSPORTATION

2. TRANSPORTATION (from the farm/ranch to next destination)

a. Main Pathways for Moving Raw Product

Raw products take a variety of possible pathways from the farm to their next destination, depending on what's been grown and harvested and/or raised. Much of the commodity products are moved out of the region through the existing and extensive highway, rail and river pathways.

Farmers and ranchers interviewed during this project used one or more of the following methods of transportation in moving raw product off of their land: hauled their own; used word of mouth to figure out a local carrier; contacted a local dispatcher to get a semi-trailer; and/or worked with the purchaser of their products to arrange the trucking.

> "If I had to ship spring wheat to Fargo, I would try to get a local to do it. Some can't leave the state. If I couldn't get a local to do it, then I would work with the purchaser [elevator] to see who they would recommend. If I'm shipping locally, there are 10 that I'm already aware of who I have noted in my phone who can help me." — Rancher from within this 11-county region

An online search reinforces the easy availability of transportation resources. For example, Quick Transport Solutions, Inc. is one website that offers the ability to search trucking companies by town in Montana. A query into Froid, Montana resulted in 10 options, including Bergstrom Farms that is noted as having 12 trucks.

The U.S. Department of Transportation's Federal Motor Carrier Safety Administration provides a Safety and Fitness Electronic Records (SAFER) System to confirm which trucking companies are authorized to operate interstate and/or intrastate and to transport what types of cargo. Using the Bergstrom Farms example noted above, the SAFER System outlines that this carrier is authorized for intrastate transportation of grain, feed, hay as well as agricultural and farm supplies.

b. Jobbers and Hot Shots

Jobbers are often categorized as independent transporters helping move raw and finished products.[3] Others will simply refer to them as neighbors or "mom and pop" hauling businesses.

However they may be described, jobbers need to be licensed if transporting and distributing milk, as one example. According to 2021 Montana Code Annotated, Title 81. Livestock, Chapter 23. Milk Price Control, Part 2. Licensing, 81-23-201. Licenses to producers, producer-distributors, distributors, and jobbers: "In a market where the provisions of this chapter apply, it is unlawful for a producer, producer-distributor, distributor, or jobber to produce, transport, process, store, handle, distribute, buy, or sell milk unless the dealer is properly licensed as provided by this chapter. It is unlawful for a person to buy, sell, handle, process, or distribute milk that the person knows or has reason to believe has been previously dealt with or

[3] Montana Food Distribution Study: Challenges and Opportunities for Grocers in Rural and Tribal Communities. November 2020. Linda Howard & Mariah Gladstone for MCDC, NADC, and NCAT.

handled in violation of any provision of this chapter. The board may decline to grant a license or may suspend or revoke a license already granted upon due cause and after hearings." Source: Montana Code Annotated 2021

"Hot shots" were another term mentioned by one of the interviewees as someone locally available with a smaller truck who helps haul products, especially something that is time sensitive. One example found through an online search is Billings Hot Shot.

3. STORAGE

Based on what was learned during this project, storage is often a challenge and is usually done at an individualized level, unless specific to commodity products. Below is a sampling of facilities, anecdotal in nature, and is not meant to be exhaustive.

a. Storage on Farms and Ranches

Storage on farms and ranches is done through grain bins, hay stacks, corn silage, totes of corn, etc. Before transporting, farmers and ranchers will store their crops on their own place or in rented grain bins on their neighbors' farms. Storage can often be hard to find, as noted by one interviewee: "You pay the bill even if you don't have anything to put in it, if you can find a grain bin lease. You don't want to let it go."

Another interviewee mentioned that for those ranchers who sell beef directly to consumers, they will have a meat locker license to store the products—i.e., a personal, operation-specific meat depot.

b. Grain Elevators

Other storage facilities include elevators such as CHS Farmers Elevator and Columbia Grain. The chart below shows the location, the type of elevator and the products being stored, based on information found on the websites for CHS Farmers Elevator and Columbia Grain. The list below is not meant to be an extensive list of grain elevators but gives an example of what exists in the region.

Table 05. Sample of Grain Elevators in the Region

Grain Elevator Location	Company	Type	Products
Macon	CHS	Shuttle Loader	Spring Wheat Winter Wheat
Glendive	CHS	Shuttle Loader	Spring Wheat Winter Wheat
Glasgow	CHS	48 Car Loaders	Spring Wheat Winter Wheat
Glendive	CHS	48 Car Loaders	Corn Peas Lentils Barley
Wolf Point	CHS	26 Car Loaders	Durum Yellow Peas Lentils
Circle	CHS	Truck Stations	Spring Wheat

			Winter Wheat
Richey	CHS	Truck Stations	Spring Wheat Winter Wheat Durum
Scobey	CHS	Truck Stations	Spring Wheat Durum
Wolf Point	Columbia Grain	Non-Shuttle Loader Pulse Processing	Not Specified
Whitetail	Columbia Grain	Non-Shuttle Loader	Not Specified
Plentywood	Columbia Grain	Organic Shuttle Loader Pulse Processing	Not Specified

c. Cold Commercial Storage

Some cold commercial storage options currently exist in Glendive at the Chamber of Commerce location and at the Eastern Plains Event Center (EPEC).

At the Glendive Chamber of Commerce, cold storage exists and is used to store the Yellowstone River Caviar. Storage space includes:

- 1 Walk-in Refrigerator: 7' x 7' (with shelving on only one side)
- 1 Deep Freeze: 24'" x L x 35" x 26" deep
- 1 Walk-in Freezer: 7' X 7'

A loading dock does not exist at the Glendive Chamber, but there are double doors going into the back of the chamber.

At the Community Kitchen in the EPEC in Glendive, the following exists:

- 1 Walk-in Freezer: 8’ x 8’ (estimated)
- 1 Walk-in Cooler: 16’ x 8’ (estimated)

Glendive Chamber’s Walk-In Freezer. October 2021.

The Community Kitchen has a hand truck, a receiving dock and a ramp that goes into the main part of the building. A visit to the space in September 2021 showed that the refrigerated section was being used for dry storage at that time.

SECTION 4: PROCESSING

4. PROCESSING

a. Meat

Meat processing is a dynamic landscape in Montana. One rancher described taking meat to several processors over just the past three years due to meat processors closing, new processors opening, and the demand for local processing that has many processors scheduled out as far as 12+ months. People are frustrated by limited capacity, long waits, confusing regulations, construction permit delays (due to the lack of qualified inspectors in-region), and staffing shortages. In a nutshell, as several people said, “Meat processing is a huge issue.”

A limited availability of skilled workers and the hard physical nature of slaughter and butchering meat contribute to this dynamic landscape. As one rancher put it, “There’s a high turn-over rate. You make good money, but it’s hard on the body: arthritis, long hours, joints….” If a processing plant burns down, rumors fly.

The need for skilled workers has led to two new training programs, one through Miles Community College and one through MSU Northern. Miles Community College offers a one-year processing certificate, and welcomed its first students in January 2021. (Prairie Star, 1/5/2021) Even in this first year of apprentice placements, demand appears to exceed supply: not all processing facilities who expressed interest received an apprentice this first year. At MSU Northern, the curriculum is still in development. Once launched, students will be able to “earn anywhere from a one-year certificate to a bachelor’s degree with a focus on business management and marketing.” Articles report that MSU Northern’s program will be “the first ever meat processing curriculum in the country that teaches meat processing from harvest to retail utilizing the mobile processing unit.” (Northern Ag Network article, 11/2/2020)

Re-investment in small- and mid-scale meat processing gained momentum during the pandemic, with nearly $12 million invested through the MMPIG (Montana Meat Processing Infrastructure Grant) program. Using federal relief dollars made available by the Coronavirus Aid, Relief, and Economic Security (CARES) Act, MMPIG awarded funds to processors across the state (State of Montana Newsroom, 11/23/2020). In Eastern Montana FADC’s 11-county region, 10 MMPIG grants ranging from $20,106 to $150,000 were awarded, with another 3 MMPIG grants awarded in Richland County.

For State and USDA certified meat processors, the availability of inspectors is reported to be an issue. There is a sense that State inspectors are more responsive to Montana businesses, when available. Given these and other challenges, the 2021 Montana Legislature passed HB 336, ‘Establishing the Cooperative Interstate Meat Compact’, and it is possible that new pathways to sell and transport meat across state lines with other “compacting states” will emerge.

SECTION 4: PROCESSING (CONT'D)

SUMMARY OF MEAT PROCESSING CAPACITY

(Additional details can be found in Appendix: Meat Processing Facilities)

→ **Custom Exempt** (as of 9/21/2021): 15 certified within this 11-county region, 2 in Richland Co, 13 in adjacent/nearby counties

→ **State** (as of 11/5/2021): none in this 11-county region, 1 in Richland county, 2 in adjacent/nearby counties

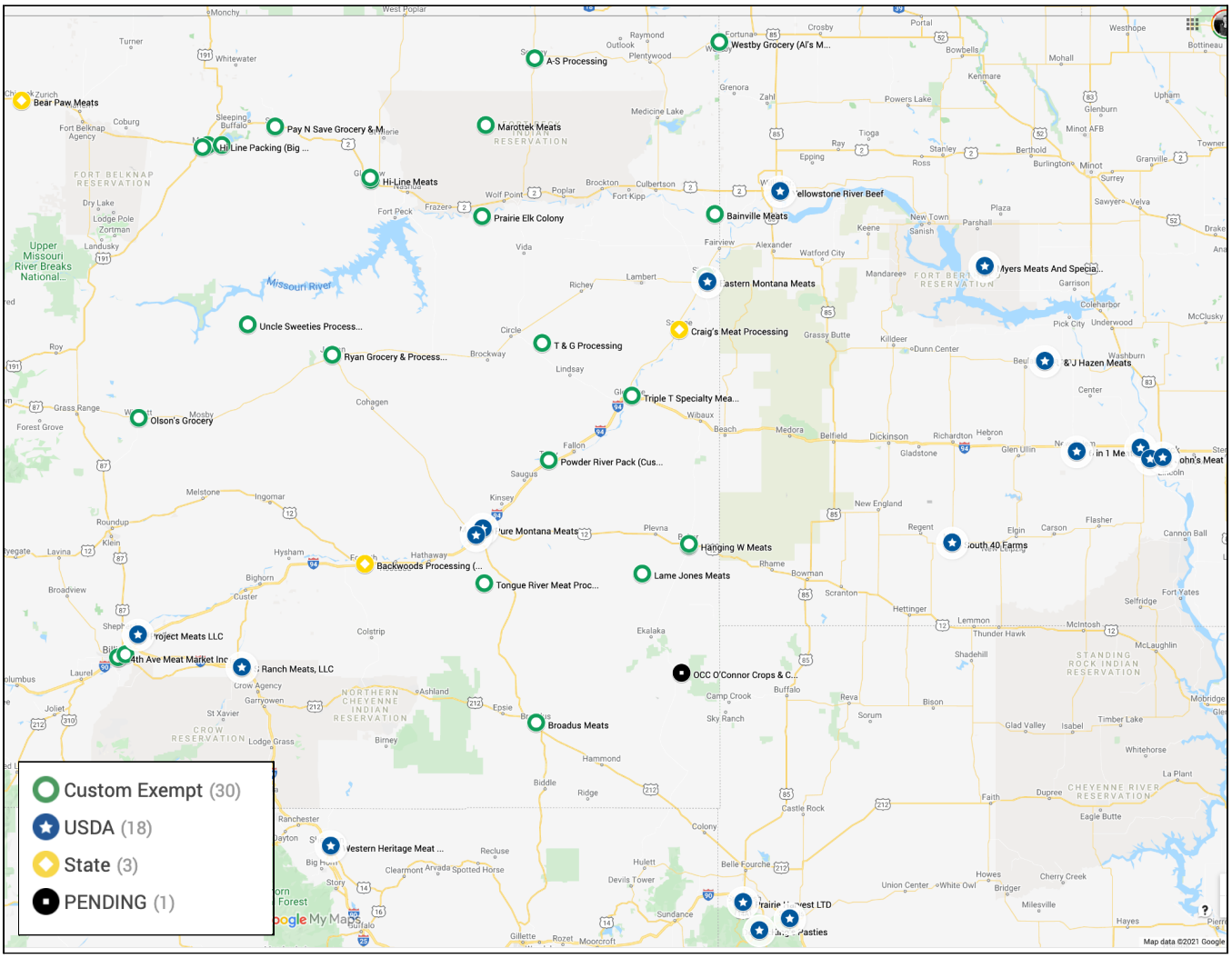
→ **USDA** (as of 9/22/2021): none in this 11-county region (OCC intends to be USDA/Organic), 5 adjacent/nearby (3 in MT, 1 in ND, 1 in WY), and another 8 around periphery (only as far as Rapid City, SD and Bismarck, ND)

→ **Mobile**: Wild Idea Bison Co, Rapid City, SD, has processed meat in eastern Montana.

Map 01. Location of Processing Plants in the Region

Note: Even in communities with meat processing facilities, capacity and certification status still limits availability of slots for processing and access to local meat for institutions, retail, and individuals.

Explore map online: Meat Processing — Eastern MT FADC



SECTION 4: PROCESSING (CONT'D)

b. Crops: Pulses, Grains, Etc.

Online research shows that Columbia Grain does pulse processing in two locations: Wolf Point and Plentywood. As explained on the Columbia Grain website, the Plentywood location has a "new, innovative, high-tech processing plant…[that] has increased our ability to receive and process grower pulse crops by 60 percent; processing upwards of 100,000 MT per year. In this area alone, we work with more than 150 producers, taking in dry peas, lentils, and chickpeas from northeastern Montana and North Dakota." This pulse processor is used by Farver Farms as one of the first steps in creating its value-added products and preserves the identity of the pulses.

CHS Farmers Elevator offers a certified portable seed cleaner at its Richey location for spring wheat, winter wheat, barley and pulses; however, this seed cleaner is not for human consumption. Human consumption seed cleaners are believed to be in Culbertson as well as Beech, ND, but have not been verified. Another seed cleaner is rumored to be in a Glendive basement.

As explained by one interviewee, the majority of the commodity crops for human consumption are exported out of state for processing due to the reduction in shipping costs for finished products and the increased availability of labor. For example, wheat is typically sent to the West and overseas; durum is often shipped to the Midwest; and lentils are exported, frequently to India.

Additional examples of crop/grain/pulse processors identified are listed below in Section 4: Processing, Value-Added Products (e).

c. Produce

Produce aggregation and/or processing is a critical piece of local/regional food systems, yet viable business models can be tricky to establish where production is seasonal. In northern climates, these businesses tend to source "local first" and augment with produce from nearby regions. Signs/labels to indicate where produce was grown help reinforce understanding and increase customer loyalty.

In Montana, examples of produce aggregators and/or processors include farmer-led efforts, such as Yellowstone Valley Food Hub (Billings), Western Montana Growers Coop (Missoula), Mission Mountain Food Enterprise Center (Ronan), Wicked Good Produce (Flathead Valley), and The Farmers' Stand (Whitefish), and Root Cellar Foods (Belgrade). The Produce Market in Billings is a new business specializing in fresh produce and locally sourced products (launched Jan 2021), while Intermountain Produce Company in Bozeman has redistributed fruit from Washington and Oregon since 1982. No produce processors or aggregators were identified in this region.

d. Licensed Kitchens

Licensed kitchens, also known as commercial kitchens, are most simply defined as "commercial-grade facilities that are licensed for food service providers to prepare and store food," according to the Food Liability Insurance Program. Per the Montana Department of

Agriculture, Hi-Line Kitchen Processing in Malta is the closest commercial kitchen in Montana. However, licensed kitchens exist in the 11-county region. Most are located in fairgrounds, churches, schools and other institutions.

The Community Kitchen in Glendive's Eastern Plains Event Center (EPEC) is managed by Community GATE, and is used for everything from catering to community dinners to private baking parties. During the Bakken oil boom, the space was successfully rented to entrepreneurs who catered to oil workers. Just recently, this kitchen was used to cook and serve more than 1,000 meals for an annual Christmas dinner, both take-out and dine-in. Turkey, ham, dressing, gravy, salads, vegetables and 120 pies were all made from scratch in the commercial kitchen.

Community Kitchen, located at the EPEC, Glendive, Montana. September 2021.

Licenced kitchens identified during this study include:

→ Community Kitchen in Glendive's Eastern Plains Event Center: licensed with equipment
→ Glendive Chamber of Commerce: licensed, minimal equipment at this time. This facility has not been available to rent in the past; this policy is being reconsidered.
→ Milk River Activity Center in Glasgow: licensed, reported to receive little use.
→ Fort Peck Community College: a small galley kitchen is used to prepare foods for events. Plans exist to construct a larger teaching/commercial kitchen.

As community leaders and entrepreneurs consider how existing or new licenced kitchens would add value to the regional economy, the definition used by Kansas Department of Agriculture offers a useful framework:

> "Commercial Kitchens are food facilities that have multiple users that can be a good resource for small food business startups. The overhead costs of using an incubator kitchen can be much lower than renovating, building, or renting a facility. Many incubator kitchens also have commercial equipment that might be cost prohibitive for a small startup. For 'cottage food' (foods made at home for sale directly to the end consumer) businesses, the incubator kitchen provides a separation from personal use kitchens.
> - Commercial Kitchens can be a non-profit or for-profit operation
> - Commercial Kitchens sometimes have a waiting list due to lack of capacity
> - Commercial Kitchens are sometimes an ideal place to be educated in cooking or baking
> - Some Commercial Kitchens have extended services (mentoring, sales efforts, etc) while most do not
> - A Food Innovation Center is usually associated with a college or an incubator"

In addition, licensed commercial kitchens can provide teaching facilities needed for workforce development programs, such as the Culinary Training offered by Livingston Food Resource Center.

It is important to recognize that commercial kitchens require management and coordination, and this capacity issue is vital to address in any business plan. Also, it's worth noting that incremental growth can increase feasibility. For example, Mission Mountain Food Enterprise Center in Ronan — remote, but located near much larger population centers than this region — took over 20 years to reach its current capacity.

e. Value-Added Products

Within the area served by Eastern Montana FADC, 38 operations reported having sales related to "value-added, retail, directly marketed, human consumption" in 2017; only three noted having sales related to "value-added, wholesale, direct to retailers, institutions, food hubs, local or regionally branded, human consumption"; and 10 reported producing and selling value-added products. Source: USDA, National Agricultural Statistics Service

Although the majority of crops grown and livestock raised here leave the region as raw commodities, there is expanding capacity to add value to meat through in/near-region processing, as noted in Section 4: Processing, Meat (a). Launching and sustaining other value-added products is less common, and a majority of these products — jams, baked goods — are found only at farmers markets. There are a handful of value-added food producers that market and distribute their products more widely.

Table 06. Example of Value-Added Products and Businesses in the Region

Value-added products made in/nearby this region, including examples of businesses in/nearby this region that have closed or been sold.

Status	Business	Product(s)	Notes
active	Farver Farms Scobey	lentil crunchers, meal mixes, dessert mixes	Products developed specifically to add value to a locally grown crop.
active	Ganruds Lefse Shack Scobey	lefse, lefse chips	Founded in Opheim in 1977, purchased and moved to Scobey in 2018. Uses flour from Great Falls, potatoes from Kinsey.
active	Western Trails Food Glendive	baking and flapjack mixes; soup mixes; whole grains/pulses (barley, garbanzo beans, flax)	Founded in Bozeman, purchased and moved to Glendive in 2006. Business has since changed hands; new owners have moved production facility to a new site within Glendive. Website promotes locally sourced ingredients.
active	Yellowstone River Caviar	paddlefish roe	Glendive Chamber of Commerce and Agriculture partnership with MT FWP; profits fund fisheries management and community grants. Big Sky Journal, summer 2019
active	North of Nowhere	grass-fed beef sticks, hotdogs, patties	Currently processing at Mission Mountain Food Enterprise Center in Ronan.
start-up phase	41 Grains	chickpea flour, wheat flour	Goal: turn local pulses and grains into products Montanans can eat, such as chickpea flour. Product

			launch anticipated January 2022.
closed	Montola Growers Inc. (1997-2009)	safflower oil	One of 5 safflower processing plants in the world when it started, used an oilseed processing plant built in Culbertson in 1954. ● Billings Gazette, 3/30/2002 ● Western Farmer-Stockman, 4/26/2009
active	Wood-N-Woven	textiles	Located in Terry. Uses wool from Prairie and Dawson Counties to weave blankets, scarves, etc. ● Montana Farm Bureau Federation, 10/26/2020
active	Big Sky Honey	honey	One example of a local apiary. Based in Fairview, this MT-based business is an interstate operation. Varietals sold include ND alfalfa; hives provide pollination services in Bakersfield, CA.
closed	Whoopup Creek Luffas	luffa *also: "Montana Sugarbeet (facial) Scrub"*	Existed for a time on the outskirts of Glendive. Reported to be profitable and successful, no longer in business because the owner's situation changed.
unknown	Kreiman's Farm	whole wheat flour	As of September 2021, being sold in bulk at the Farm-to-Table store in Glendive and noted as being ground in the Community Kitchen.
active	Montana Cow Pies	bakery	Based out of Sidney. Sold at regional grocery and convenience stores, including Reynolds.
active	Wild Calf Coffee	coffee bean roasting and grinding	Facility based in Bainville. Made in Montana product, processing outsources beans.
closed	Bushel 42 Pasta Company	pasta	Located in Crosby, ND, the plant closed after less than a year when its partner company, American Italian Pasta Co, decided the venture would not be profitable enough. Williston Herald, 7/28/2003
sold	Dakota Growers Pasta Co.	pasta	Founded in 1990 as a wheat-growers cooperative, this company went public in 2003. The brand has now been sold a number of times, and is no longer locally owned.

5. DISTRIBUTION

a. Grocery Distribution

It's fairly obvious that distribution across vast regions with small populations is challenging. Contemporary food systems — which operate at multiple scales across multiple sectors and are optimized for large population centers — offer valuable but constrained solutions. Add the variability of people's preferences and buying patterns; the reality that perishables go bad; and the logistics involved with moving product safely from point 'A' to points 'O' and 'K', and food distribution takes on layers of complexity that require patience to puzzle through.

In this 11-county region, distribution falls into overlapping territories, routes, capabilities, institutions served, products and ownership structures. Table 07 on pages 42-43 outlines the range of distribution entities operating within this 11-county region. Map 02 on page 44 shows the lead distributors serving grocery stores in this region, including a handful of smaller stores that provide food access in more remote communities.

b. Grocery Distribution Notes

→ Major interstate distributors often utilize smaller independent local/regional companies to move their product.
→ Some products can be ordered through multiple distributors.
→ Minimum order requirements can force smaller businesses to get creative, pooling orders and finding whatever solution is available to move product the last mile (definition: 'the last mile').
→ Grocery stores are deeply tied to their main distributors. Major grocery distributors offer incentives: the more you buy, the more discounts you get. Major distributors also offer assistance with business operations (e.g., POS system trouble-shooting), as well as support tracking and understanding industry trends. For capacity-limited rural stores, this support can be essential.
→ Loyalty to one's lead grocery distributor can run deep. One grocer reported that their distributor recognized their store as serving a remote community, and during COVID-19 shortages, the distributor actually prioritized that rural location over urban centers. This distributor's rationale: "Bigger population centers have more options for getting essentials."
→ Loyalty can also come from the headache it would be to shift distributors. As one interviewee quipped, "if it ain't broke, why fix it?" In other words, it's working well enough.
→ A less positive reason for loyalty is fear. When COVID-19 hit in 2020, there were a handful of remote grocery stores in Montana that lost their distributors with 24 hours notice. As one interviewee said, "How were they supposed to find a new source for their customers that fast?" And although never in writing, there are reports of distributors threatening Montana grocers — i.e., "if you bring in another product source, we'll drop you."
→ While the advantages/disadvantages of different business structures is beyond the scope of this study, it's worth noting that distribution businesses' structures can range from sole proprietor to international corporation, from national co-op to LLC. The incentive for businesses to give back or invest profits within smaller, remote communities inevitably varies, too.
→ FedEx is often used for delivery of specialty orders.
→ There is growing capacity in the greater region that could serve eastern Montana, either in the near-term or long-term. For example:

- Quality Foods Distributing (Bozeman) specializes in natural, organic, specialty and local/regional foods. This company is interested in serving eastern Montana. At this time, one route reaches as far east as Billings; another route overnights in Havre and returns via Chinook/Lewistown. Customers from beyond the distribution route can arrange to pick-up orders. Establishing a new route that reaches further east would require sufficient orders and back-haul to make this sustainable and viable.
- Yellowstone Valley Food Hub (Billings) is interested in serving eastern Montana in the future, as their capacity increases.
- Western Montana Grower Co-op offers wholesale and delivery of fresh, quality products from Montana farms in the Flathead, Jocko, Mission and Bitterroot Valleys. This co-op is exploring partnerships to increase the amount of fresh, local produce available to all Montanans. They are a partner in Montana's new Local Food for Local Families Coalition, and a founding member of the Northwest Food Hub Network.
- The Northwest Food Hub Network is a collaboration founded by three cooperative, farmer-owned food hubs: Western Montana Growers Co-op, Local Inland Northwest Cooperative (LINC Foods), and Puget Sound Food Hub Cooperative. Working together, this network makes it simpler to access healthy, wholesale local foods from over 200 sustainable farms in the Northwest region.
- Charlie's Produce (Spokane) specializes in produce distribution. They serve Montana; trucks have been observed as far east as Bozeman.

c. Direct Distribution

When considering food availability and access, it is common to overlook or undervalue the role that direct farm-to-customer sales can play. Of the 30 producers who answered the online survey question as to where they sell or distribute what they grow/raise/harvest, more than 50% noted that they sell at least some products direct to consumers.

Direct sales may take place at a farm stand, via farm truck, during a farmers market, via an aggregator, or within another business. The range of pathways is essential, because people have different schedules to juggle; for example, some people love farmers markets, while others find them inconvenient or impractical.

Farmers markets are a familiar direct farm-to-customer distribution tool, and there are several in the region:

- Glasgow Farmers Market* *(Saturday mornings, July→killing frost, usually until Thanksgiving)*
- Glendive Saturday Farmers Market* *(Saturday mornings, June→Oct)*
- Richland County Farmers Market* *(Saturday mornings, July→killing frost)*
- Plentywood Montana Farmers Market
- Wolf Point Farmers Market
- Circle Farmers Market *(periodic/irregular)*

** listed on state-wide promotional materials: 2021 Guide to Montana's Farmers Markets*

Buying clubs are another tool for receiving fresh produce directly. While this produce isn't grown locally, delivery caters to local individuals through cooperative buying clubs that are managed through social media such as FaceBook. The produce may originate from similar sources as the

produce in grocery stores, but it comes from aggregation sites tailored to serving remote households. There are a minimum of two active buying clubs in this region: Outpost Buying Club out of Outlook, northwest of Plentywood, and Hell Creek Buying Club.

Other examples of direct-to-customer distribution pathways in this 11-county region include:

- The freezer case located within TSO Cantina in Ekalaka, where OCC Legacy Cuts sells their local organic beef.
- The two hardware stores in Plentywood, both of which sell local food products. Plentywood Hardware sells Montana branded beef from one local family; Zeidler Hardware sells a range of local products including lamb, buffalo, eggs and beef.
- Prairie Elk Colony sells produce, meat and baked goods to customers directly from their truck. They maintain a regular weekly schedule in communities such as Wolf Point and Poplar.
- Online sales through Facebook Marketplace and producers' websites.
- Pop-up farm stands, such as the pick-up produce sales pictured here.

A local producer sells corn, squash and cucumbers from the back of their pick-up in Terry, Montana. September 2021.

A newer tool for fresh food delivery that is used in-region is meal delivery service. These services are beyond the reach of many household budgets, and the ingredients are not grown or raised in-region, but the convenience of these offerings is significant. Interviewees report that especially when compared to the "thaw-and-reheat, deep-fried bar foods" found at many area restaurants, these tools make sense. No in-region meal delivery business was identified during this study; the companies mentioned were Hello Fresh and Blue Apron. (The number of these services has proliferated, and reviews evaluating their offerings abound: Epicurious, 8/16/2021; CNET Wellness, 12/1/2021; Good Housekeeping, 8/31/2021.)

Emergency food distribution is another critical tool for getting food to households. This sector overlaps with for-purchase systems through benefits programs, food recovery efforts, and when trucks used for distribution are able to collaborate with for-profit distribution.

Table 07. Distribution Entities
Distribution entities currently serving this 11-county region identified during this study period. Montana companies that direct-deliver but are based outside of this region are not listed here.

Type	**Entity** — nearest distribution center (major companies) or company location (Montana-based businesses)	**Notes**
Major Grocery Distributors	• Associated Food Stores — Salt Lake City, Utah • UNFI (SuperValu) — Billings, MT; Bismarck, ND • Spartan Nash — Fargo, ND • Albertsons — North Salt Lake, UT; Denver, CO	These companies focus on full-service grocery stores.
Major Food Distributors	• Sysco — Billings, MT • US Foods (Food Service of America) — Billings, MT; Bismarck, ND	These companies focus on food service and serve a greater variety of institutions.
Major convenience, snack and beverage distributors	• Core-Mark — Spokane, WA • Frito-Lay — West Valley City, UT • Coca-Cola — Billings, MT; Williston, ND; Havre, MT; Sheridan, WY; Gillette, WY; Rapid City, SD	These companies often partner with smaller distributors for the distribution of beverages, tobacco, snacks, ready-to-go foods, and other items.
Regional Distributors	• Doyles Sheehan — Missoula, MT • Intermountain Produce Company — Bozeman, MT • Gaines Produce — Great Falls, MT • Bountiful Baskets — Fruita, CO • Badlands Distribution — Fargo, ND • Valley Distributing — Billings, MT • S&S Roadrunner Sales — Bismarck, ND	Intermountain, Gaines, and Bountiful distribute fresh fruit/produce directly to individuals or groups. Badlands specializes in frozen pizza, ice cream, and “grab ‘n’ go” items. Doyles Sheehan and Valley carry a selection of food and convenience items. S&S Roadrunner distributes a variety of specialty items produced regionally including pizza, soup, pickled asparagus, etc.
Local Distributors and Direct Store Delivery	• J&M Distributing — Wolf Point, MT • Northern Border Distributing — Scobey, MT	Distributors in this group transport a wide range of products, sourced from a variety of sources. For example: MeadowGold milk; Sysco items for smaller entities that don’t meet minimum order amounts; Wheat Montana; etc.
Company Direct	• Ganrud’s Lefse Shack • Farver Farms • Honey producers (multiple small operations)	While these companies may partner with jobbers/neighbors/distributors to transport product, they also make their own deliveries. Distribution generally involves juggling schedules, variable orders, manual ordering systems, and multiple transportation partners.

Jobbers		Jobbers are individuals with delivery trucks (temperature controlled or not) who assist with smaller jobs, intermittent delivery, and “the last mile”. Neighbors who assist fit in this category, as do “people I’ve met, they’re in my phone.”
Specialty: direct to individuals	• Alaskan Seafood Guys — Billings, MT • Prairie Elk Colony — Wolf Point, MT • Peeler’s Wild Alaska Seafood — Bozeman, MT 	Alaskan Seafood Guys offers one time or subscription options, delivery or shipment. Towns recently scheduled for home delivery include Glasgow, Wolf Point, Baker & surrounding area. Prairie Elk Colony keeps a regular weekly schedule through the growing season, parking their truck at different locations at different times. They sell produce, meat, pies, etc. directly to individuals. When there’s surplus, their produce may be found through local grocery stores. Peeler’s runs a variable route with their frozen seafood trailer. Towns recently scheduled for stops include Glasgow, Wolf Point, Circle, Sidney, Glendive, Baker, Wibaux.
Emergency Food Distribution	• Montana Food Bank Network (MFBN) • USDA commodity (TEFAP, etc) • Volunteer networks • Community-based organizations (schools, churches, agencies, etc.) • Local Food for Local Families Initiative (an alliance of Montana organizations, incl. MFBN, MMFEC, Hopa Mountain and others)	MFBN partnered with Dr. Carmen Byker Shanks/MSU to conduct an emergency food services needs assessment. Completed Sept-Dec 2021, the study goal is to outline existing resources, challenges, opportunities, and potential partners across all 56 counties in Montana.

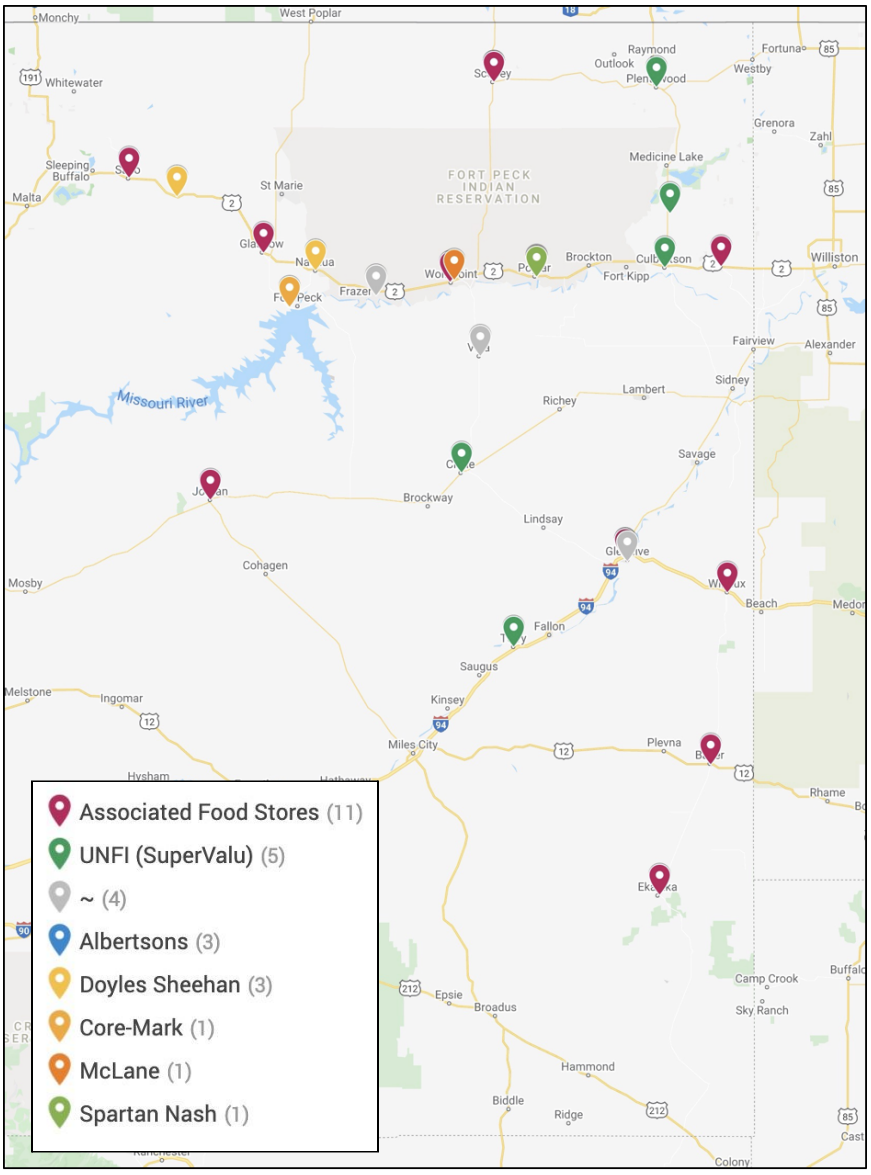
Sysco Food Truck headed towards Billings, Montana. October 2021.

Map 02. Lead Distributors in the Region

Lead distributors serving grocery stores in this 11-county region. Only full service grocery stores and a handful of smaller grocery/convenience stores serving remote communities are included here.

Not all pins can be seen in this snapshot. To access this as an interactive map, where you can zoom in/out, see store names, and determine if a grocery offers WIC, visit: GroceryDistributors—EMTFADC.

Primary data for WIC availability comes from Montana DPHHS. If 'WIC' field shows '*', this location offers WIC according to WIC Store Locator. However, this secondary data is unreliable. As of 12/12/2021, WIC Store Locator still listed the Main Street Market in Ekalaka, which is no longer in business, and several Shopko locations, despite the fact that Shopko closed retail locations in 2019 (The Montanian, 7/14/2020)



6. RETAIL

a. Grocers

For a succinct snapshot, Table 08 (p. 47-48) lists major grocers in this 11-county region, and includes the names of the lead distributors displayed in Map 02 (p. 44).

Cost. Prices at rural and remote grocery stores are typically higher than those found in more urban locations, although sometimes the variability can appear random or unexplainable. In the Montana Food Distribution Study completed in late 2020, when comparing prices between different stores, researchers found that "evaluating for population of a community (which should affect buying volume), and distance from an interstate highway of large city (which should affect transportation cost), did not reveal any clear pattern."[4] One pattern this study did observe was a correlation between proximity to an Indian reservation and cost. "Overall, the median price for groceries on a reservation is 23% higher than those found off a reservation."[5]

The project team for this Regional Food Economy Study repeated the market basket survey methodology used in the 2020 study to evaluate price variability within this 11-county region. Data is summarized in Appendix: Market Basket Study. At the four stores also surveyed in 2020, overall basket price increases ranged from 13.8% to 28.9%. Both the largest and smallest price increases were in Glasgow. Given the size of this 2021 dataset and the remoteness of all grocery stores surveyed, no factor consistently correlated with observed price differences.

More broadly speaking, grocery prices are influenced by a store's need to juggle two competing goals: (1) serve customers, and (2) make a profit. Without running in the black, a store goes out of business. But if prices are too high, customers may go elsewhere or feel resentment. It's not always easy to balance these competing goals, and perceptions of how well a store serves customers can vary widely. For example, one survey respondent noted, "It is pretty bad when local grocery store owners have high prices and employees never get raises and owners are still able to build a multi million home and take expensive vacations all off the money from local people and their employees." At the same time, another survey respondent shared, "The grocery store sometimes carries local items which is very convenient. I like that alot!"

The challenge of providing affordable, fresh food in small, remote communities is compounded by other factors, from the challenge of distribution to the limited number of potential employees. In addition, when a business owner is ready to retire, it can be difficult to find a buyer. Two stores visited during this study were for sale: Circle Country Market and Saco Pay-N-Save. Both have been on the market for multiple years.

Locally and Regionally Produced Foods. Local grocery stores carry an occasional local product, such as Prairie Elk Colony sweet corn when it is in season. In Jordan, when In My Plants began selling produce at a road-side stand, Ryan Grocery & Processing arranged to sell

[4] Montana Food Distribution Study: Challenges and Opportunities for Grocers in Rural and Tribal Communities. November 2020. Linda Howard & Mariah Gladstone for MCDC, NADC, and NCAT.
[5] Montana Food Distribution Study: Challenges and Opportunities for Grocers in Rural and Tribal Communities. November 2020. Linda Howard & Mariah Gladstone for MCDC, NADC, and NCAT.

the majority of this produce directly from the grocery store. Delivered Mondays and Thursdays, the produce usually sells out by evening. As one interviewee said, “Cucumbers! Couldn’t keep enough of them in the store. People’d be waiting for them.”

However, grocers’ willingness to sell locally grown produce varies. Interviews suggest grocery managers are hesitant to carry local produce due to irregular supply, inconsistent quality, shorter shelf life, or a perception that customers want “flawless” vegetables. No grocer cited government regulation as a reason not to carry local produce, but there does appear to be inconsistent understanding regarding what regulations may apply.

For meat products, regulations are clear. To be sold in-store, locally raised meat must be butchered under State or USDA inspection. It can then be further processed in any licensed facility, such as butcher shops within grocery stores, and sold to the public. Several grocery stores in this 11-county region sell Montana beef, including Reynolds, which offers Pure Montana Meats out of Miles City. Ruebs SuperValu in Plentywood reports selling beef from Eastern Montana Meats and displays a selection of cuts branded Angus Farms (Cargill). Ijkalaka Grocery — newly opened — had several local brands from Oregon on display.

Other grocers — including those with meat departments that are able to cut meat in-store — source meat through their grocery distributor. The main reason given for not sourcing local meat is availability: it may not be available, or is hard to source, or is unreliable due to limited local/regional processing capacity. The second most common reason cited was their relationship with a distributor. This second reason has four main threads. One: reliability. Disruptions in 2020 and 2021 don’t seem to have shifted the perception that the national meat supply chain is reliable. Two: incentives. Major distributors offer discounts based upon how much is ordered. Three: price. While meat prices have risen, commodity meat is usually still cheaper than local. Four: control. This last thread is often unspoken, but distributors are reported to disapprove of stores that carry competing product.

Meanwhile, of the 303 survey respondents who answered the question “How interested are you in purchasing locally/regionally produced foods and ingredients?”, 70% (213) answered that they were “definitely interested”. Only one respondent answered “definitely not”, and only one “probably not.” Given the interest in purchasing local foods, selling locally sourced foods is clearly a market opportunity.

At the same time, rural grocers only have so much time in a day. Keeping shelves reliably full of products that customers want — keeping shelf space moving — is vital to remain viable. Every additional distributor or supplier requires time to manage. Streamlining systems saves time, and with labor in short supply, even a grocer who believes in locally sourcing products may find it challenging to carry them. This is the reason one interviewee explained, “If it’s successful enough, if you can get it into the system and slotted at the warehouse and people buy it, I can carry it.” An example given was Redneck Sausage, out of Kalispell.

The Farm-to-Table Store in Glendive has a different model. For this store, the goal is to develop a viable pathway for local producers to sell their products to local buyers. The Farm-to-Table Store is one piece of a multifaceted Farm to Table initiative founded in 1998, in collaboration with Community GATE. “Dedicated to building a sustainable local food system for eastern

Montana," the initiative hit a setback when one of its founders passed away in 2019. The commitment to evolve this cooperative and offer more locally grown, raised, produced and processed offerings remains strong, and a new generation of community leaders is interested in helping local producers add value and get their products to market.

Table 08. Grocery Stores in the 11-county Region

Several convenience stores are included for comparison. Primary data for WIC availability comes from Montana DPHHS. If 'WIC' field shows 🔻, this location offers WIC according to WIC Store Locator. (Additional notes in Appendix—Market Basket Study).

Store Type	Store Name	Town	County	Main Distributor	WIC
grocery (sm)	Pay-N-Save	Saco	Valley	Associated Food Stores	
grocery (sm)	Cromwell's Convenience	Scobey	Daniels	Doyles Sheehan	
grocery (sm)	B&B Foods	Nashua	Valley	Doyles Sheehan	
grocery (micro)	the "Oh Yeah Store"	Vida	McCone	~	
grocery (micro)	Tribal Express	East Poplar	Roosevelt	~	Accepts WIC
grocery (micro)	Tribal Express II	Frazer	Valley	~	Accepts WIC
grocery	Reynolds	Baker	Fallon	Associated Food Stores	Accepts WIC
grocery	Ijkalaka Grocery	Ekalaka	Carter	Associated Food Stores	Accepts WIC
grocery	Corner Market	Wibaux	Wibaux	Associated Food Stores	
grocery	Albertsons	Glendive	Dawson	Albertsons	Accepts WIC
grocery	Reynolds	Glendive	Dawson	Associated Food Stores	Accepts WIC
grocery	Circle Country Market	Circle	McCone	UNFI (SuperValu)	
grocery	Tande's Grocery	Poplar	Roosevelt	Associated Food Stores	Accepts WIC
grocery	Main Street Grocery	Poplar	Roosevelt	Spartan Nash	Accepts WIC
grocery	Albertsons	Wolf Point	Roosevelt	Albertsons	Accepts WIC
grocery	Tande's Grocery	Scobey	Daniels	Associated Food Stores	Accepts WIC
grocery	Hometown Market	Culbertson	Roosevelt	UNFI (SuperValu)	Accepts WIC
grocery	Rueb's SuperValu	Plentywood	Sheridan	UNFI (SuperValu)	Accepts WIC
grocery	Ryan's Grocery & Processing	Jordan	Garfield	Associated Food Stores	Accepts WIC
grocery	Froid Grocery	Froid	Roosevelt	UNFI (SuperValu)	
grocery	Albertsons	Glasgow	Valley	Albertsons	Accepts WIC
grocery	Reynolds	Glasgow	Valley	Associated Food Stores	Accepts WIC
grocery	SuperValu	Terry	Prairie	UNFI (SuperValu)	Accepts WIC
farm to table	Farm to Table Store	Glendive	Dawson	~	
conv/grocery	Agland West	Wolf Point	Roosevelt	Associated Food Stores	
conv/grocery	The Welcome Shop	Bainville	Roosevelt	Associated Food Stores	
conv/other	Family Dollar	Wolf Point	Roosevelt	McLane	🔻

conv/ other	Lakeridge	Fort Peck	Valley	Core-Mark	
conv/ other	Raiders Quick Stop/Ezzie's	Hinsdale	Valley	Doyles Sheehan	

b. Restaurants/Cafes/Bars, Food Trucks, Caterers

Restaurants, cafes and bars are one of the top three places where the residents who took the qualitative online survey currently purchase their food. Nearly two out of three survey respondents get their food from this source.

Although 61% are getting food from restaurants, cafes and bars, only 34% would prefer to purchase their food that way. This discrepancy may be due to challenges that area residents have with the food they are currently experiencing at existing restaurants, cafes and bars. When asked what specific types of food-related businesses that they would like in their area, the most frequently mentioned responses were related to better dining out options, including ethnic choices. Many survey respondents noted that they wanted more variety and healthier food at their local restaurants; family friendly; longer hours; and places that were open seven days a week.

> “I would love to see a cook from scratch restaurant. One who doesn’t just fry up food truck food.” — Online survey respondent, town and age not shared
>
> “Veggies and fruit are missing from many menus or are limited. It's the same old tired Caesar salad.” — Glasgow resident, age 45-54
>
> “A restaurant to cater to those of us who work all day and late evenings.” — Nashua resident, age 45-54
>
> “We need more family-style restaurants that offer healthy food options for when this mamma needs a break from cooking.” — Glasgow resident, age not shared

When it comes to food trucks, 11% of survey respondents report getting food from food trucks, but 18% are interested in this option. As noted by one respondent from Wolf Point, “I would like a food truck that sells healthy but delicious and affordable food.”

The majority of food trucks identified during this study offer burgers or barbeque. Many market home or scratch cooking, but only one specifically markets itself as “Farm-to-Truck.” Business models vary, but in this sparsely populated region, catering special events seem to be valuable to turn a profit. Several food trucks are reported to provide food in a regular location at regular intervals, although providing updates on location/menu via FaceBook is common practice. Reported challenges range from labor shortages to tight margins. When asked about sourcing local meat, one business owner reported that locally processed meat might work well for burgers, but would be impractical for other menu items. For example, sourcing a large number of a specific cut of meat, often on short notice, is not compatible with existing local meat processing, storage, and distribution capacity.

List of food trucks identified during this study:

→ Bin406 (Daniels County)

→ Turcotte Food Bus (Roosevelt County)

→ Baby Got Back Barbeque & Catering (Roosevelt County)
→ Bogey's BBQ (Fallon County)
→ O'Connor's Dinner Bell (Fallon County)
→ T's Traveling Table (Fallon County)
→ Burgers & Bites (Dawson County)
→ Berg House (Valley County)

c. Institutions: Schools, Hospitals, etc.

Schools, hospitals, senior centers, prisons and other institutions are valuable customers for local food producers, often providing the baseline income needed for a business to remain viable, experiment, and grow. For the institutions, the relationships and connection to community created by incorporating local foods into their meals offers value not measured in dollars, more often equated with wellbeing, belonging, community pride and mental health. In addition, when institutions are able to incorporate local ingredients into their menus, these offerings tend to be fresh, made-from-scratch, and healthier.

Challenges faced by those who express interest in farm-to-institution efforts range from budgeting processes (hard to advance-purchase); cost differences; inconsistent quantity/supply; availability/no local production; lack of kitchen capacity (both physical kitchen infrastructure or lack of staff to prepare foods); the extra time/effort/planning required to procure food from multiple/new sources; lack of interest/motivation; too few volunteers to help manage gardens; confusion or mis-understanding of food safety regulations.

The study team documented reports of local food being incorporated into the following institutions:

- Hinsdale School
- Plevna Schools
- Jordan Public Schools
- Fort Peck Community College
- Several Fort Peck schools, e.g., Poplar Middle School (bison)
- Garfield County Health Center (occasional use of produce from In My Plants)
- Glendive Correctional Facility (secondary source, related to gardens located at this facility)

d. Food Banks/Pantries

Emergency food distribution provides an invaluable source of nutrition/calories for food insecure Montanans. While there is consistent interest and commitment to make the food available as nutritious and fresh as possible, the time and attention focused on finding ways to source foods locally/regionally in ways that also benefit local community relationships and local economies is inconsistent.

The degree to which food pantries and similar programs source locally and regionally produced foods is generally limited by the capacity of each emergency food distribution site to identify, source, procure, and afford fresh local/regional food products. Creative partnerships (such as with community gardens) and local procurement often require a staff person and/or team of community members motivated to do what it takes: coordinate with partners, communicate with

local producers, inspire and organize volunteers, juggle schedules, adapt existing systems, and/or connect the dots between donors and local food sources.

In addition, there can be a disconnect between what people using emergency food services have time/ability/desire to prepare, the timing of distribution/ability to keep fresh foods from spoiling, and the local/regional foods that are available.

Ekalaka Food Pantry in Ekalaka, Montana. October 2021.

Emergency food services exist across all 11 counties, in varying capacities. COVID-19 funding, including increases in generosity/donations during the pandemic, provided significant benefits to some facilities. For example, one pantry was able to acquire a new shopping cart for the elderly, new shelving, a scale, and increase their supply of protein.

Concurrent with this study, the Montana Food Bank Network (MFBN) partnered with MSU to complete a Montana Communities Needs Assessment across all 56 counties. The goal of the MFBN needs assessment is to identify the quantity of need, demographic information, and food available for purchase in each county, and to learn more about gaps in access and opportunities for collaboration to increase access to emergency food.

Rather than replicate this work and develop a comprehensive list of food pantries, soup kitchens, school programs, and other emergency food services — including partners and potential partners, such as senior centers, churches, shelters, youth programs such as Boys & Girls Club/YMCAs, civic organizations such as Rotary Clubs, school districts, group homes, treatment facilities, and more — this Regional Food Economy Study prioritized research in other sectors.

SECTION 7: OTHER VALUE-ADDED BUSINESSES

7. OTHER VALUE-ADDED BUSINESSES (e.g., agritourism, food events/tours)

According to the USDA, 52 operations reported income from farm-related agritourism and recreational services in the 11-county region during the 2017 Census. Source: USDA, National Agricultural Statistics Service

Based on online searches, more than an estimated 15-20 ranchers and farmers are currently marketing various forms of agritourism. In addition, momentum is building around exploring how agritourism can benefit those in the area, and the FADC has a Montana Agritourism Webinar Series scheduled for January 2022.

a. Agritourism Definition

As defined by the GNDC website and for the purposes of this project, the following definition was used: "Agritourism is a form of commercial enterprise that links agricultural production or agricultural processing with tourism in order to attract visitors to a farm, ranch, or other agricultural business for purposes of entertaining or educating the visitors. In 2017, House Bill 342 was passed into law which added agritourism to the list of Montana Recreational Activities. Agritourism connects farms to communities. Examples of agritourism activities include farm and business tours, farm-to-table dinners, farm stays, workshops, and special events such as weddings. Read more about current Montana agritourism in the Agritourism Manual."

b. Interest in Agritourism

The qualitative online survey conducted for this project explored producers' interest in agritourism; however, the results should not be considered statistically significant due to both the sample size and the methodologies in collecting the data. Among the 31 producer respondents who responded to the agritourism survey question, they were nearly equally divided in their opinions about being involved (yes = 16; no = 12; 2 = maybe; 1 = not applicable).

Those interested saw it as an opportunity to diversify their operations, generate another source of income or provide an educational opportunity.

> "Yes, a little and on a limited basis. I don't have time to get everything done as it is, I can't provide entertainment nor motel accommodations but am considering allowing photographers out here to bring their own camper and camera." — Glendive resident, age 55-64

> "Yes! I'm finding that so few people understand what it takes to run a farm or ranch. It would be wonderful to be able to educate in a fun manner." — Circle resident, age 35-44

Those who weren't interested noted liability concerns and not having enough time or other resources to commit to it.

> "Nope. Too much liability and who can keep a place that tidy!" — Plentywood resident, age 35-44

c. Current Participants in Agritourism

A few resources currently exist to see who is already participating in agritourism including: LandTrust, a website that connects outdoor adventurers with farmers and ranchers; Hipcamp, a website that connects travelers with places to stay on farms, ranches and other locations; and several websites connected to the State of Montana including: Montana Agritourism, Missouri River Country Tourism, and Visit Southeast Montana Tourism.

In addition, there may be ranchers and farmers in eastern Montana who are participating in the One Montana's Master Hunter Program, a partnership between hunters and private landowners; however, none were identified during this project.

Below is a sampling of 15 locations in eastern Montana that offer—or have offered—various forms of agritourism.

Table 09. Sample of Agritourism Operations in Eastern Montana

Location	Name	Offering	Listing
Cohagen	Cross M Working Guest Ranch	Working cattle ranch experience	https://missouririvermt.com/listing/15399
Sand Springs	IOU Ranch	Farm and ranch operation	https://missouririvermt.com/listing/11915
Jordan	Sand Creek Clydesdales Ranch	*No longer operating as guest ranch	https://missouririvermt.com/listing/11866
Baker	Big Mac's Patch	Seasonal pumpkin patch with outdoor activities including hayrides, bouncing horse races, prairie golf and more	https://www.facebook.com/Big-Macs-Patch-114259163278324/
Circle	Mahlstedt Ranch	Hunting, outdoor experiences, also ranch tour available	https://landtrust.com/l/mahlstedt-ranch/60f7853c-3727-455e-bf54-84178e83fac3
Sand Springs	LO Cattle Company	Cabin with hunting on "real working family cow ranch"	https://landtrust.com/l/lo-cattle-company/60ce6376-3647-4cf0-83dc-db1302f5008a
Brusett	Coulter Ranch	Hunting with option of trailer camping	https://landtrust.com/l/coulter-ranch/5e6fc431-b576-4627-9864-f532043e25af
Baker	Vassar Ranch	Hunting with camping allowed on property	https://landtrust.com/l/vassar-ranch-montana/6081aeda-6279-4d40-98ff-ad8e0c5e7d55

Ekalaka	Alkali Ranch	Cabin rental with activities noted including: hunting, fishing, birding, farm/ranch	https://landtrust.com/l/alkali-ranch/618dbe10-f3bb-401b-ace6-9e7ccdb363aa
Ekalaka	F & R Ranches	Hunting available	https://landtrust.com/l/f-r-ranches/60ae6493-9305-43d6-9f11-ae93bf0353e5
Ekalaka	Meyer Ranch	Hunting with two-bedroom cabin available, plus camper space	https://landtrust.com/l/meyer-ranch/5e5e98df-8e3c-4da4-a6f1-30ae546d20d8
Terry	Brackett Creek Retreat	Cabin rental on working ranch	https://www.hipcamp.com/en-US/montana/brackett-creek-ranch/brackett-creek-retreat#group_size=1&adults=1
Dagmar	Christensen Farms	Camping sites, also willing to do farm demonstrations and allow visitors to help	https://www.hipcamp.com/en-US/montana/amanda-c-s-land-7/christensen-farms#group_size=1&adults=1
Brockton	CedarBlue	Camping sites	https://www.hipcamp.com/montana/nichole-s-s-land-1/deer-eagles-more
Westby	Visionary Acres	Camping sites on small organic farm	https://www.hipcamp.com/en-US/montana/lateef-b-s-land/visionary-acres#group_size=1&adults=1
Willard	Quiet Cattle Ranch	Camping sites on cattle ranch	https://www.hipcamp.com/en-US/montana/quiet-cattle-ranch/quiet-cattle-ranch#group_size=1&adults=1

Table 10. Number of Operations with Farm-Related Income from Agritourism and Recreational Services, 2017

Source: USDA, National Agricultural Statistics Service

County	Number of Operations
Carter	12
Daniels	1
Dawson	3
Fallon	2
Garfield	12
McCone	4
Prairie	6
Richland*	17
Roosevelt	4
Sheridan	2
Valley	3
Wibaux	3
TOTAL	69
TOTAL w/o Richland	52

8. PARTNERS & COLLABORATORS

Many organizations and agencies have capacity or aligned interests, and their partnership or collaboration will accelerate the development of local/regional food systems and new food/agriculture businesses in this 11-county region. Specific ways these entities may choose to become involved in the development of local/regional food systems range from workforce development to participating in farm-to-institution sourcing, local marketing initiatives to regional trainings and educational events.

a. In Region

- Eastern Montana Food and Agriculture Development Center
- Regional and local development corporations
- Extension offices/agents
- Chambers of commerce — for example, Glendive Chamber of Commerce owns a commercial kitchen, cold storage, and meeting space
- Dawson Community College
- Fort Peck Community College — recently received a small grant to develop dual-credit courses
- Community GATE — has long history of supporting farm to table efforts, and currently manages two facilities located at the EPEC in Glendive: the Community Kitchen and the Farm-to-Table Store
- Farm to Table Co-op — currently in the process of dissolving and re-organizing as a new form of cooperative

b. Beyond This Region

- Miles Community College offers a one-year (29 credit) certificate program in meat processing
- Montana Farm to School, Montana Beef to School
- Montana Food and Agriculture Development Center (FADC) Network
- Montana Meat Processors Association
- MSU Food Product Development Lab, run by Montana's first food scientist. Focus: food product development, sensory evaluation and food processing. Work currently falls within three categories:
    - Food science for food sovereignty: "develop environmentally-sustainable food products that honor indigenous knowledge, generate revenue for local economies, and improve children's nutrition. These programs provide training in value-added product development and marketing, foster entrepreneurship, and empower women and other community members."
    - Pulses, small fruits & berries, hemp: "studying and sharing information on the culinary, nutritional, and processing properties of Montana specialty crops to make them more competitive in the world market"
    - MSU Farm to Campus: "worked with Montana food companies on improving the texture of products supplied to Culinary Services, including a pancake mix and a gluten-free granola"
- Native American Foods Directory
- Niche Meat Processor Assistance Network

Community Landscape

Evolving Rural Communities. More than 42,000 people live in the 11 counties served by the FADC. Although each county within the Eastern Montana FADC region is experiencing its own ebbs and flows in population, median age and school enrollments, it's been noted by the University of Minnesota and its Extension Center for Community Vitality that rural communities are changing but not dying. This region appears to reflect that trend. As an example, an in-depth article, "Growing Home in Ekalaka" written by Eric Dietrich, published in the Montana Free Press, explores why Ekalaka is seeing an uptick in its population.

Affordability, Quality/Safety and Healthy/Nutritional Value of Food Matter Most to Area Residents. As part of the qualitative online survey, area residents were asked to share what matters most to them when it comes to food. Several themes emerged from the open-ended responses.

Affordability is key. 50% of respondents noted that the price and cost of food is one of the top three things that matters most to them and their family. Quality and safety (33%), healthy and nutritional (33%) aspects of food also ranked high for respondents. 30% of the top three answers included mentions of specific types of foods including produce, fruits, vegetables, meat and beef. Availability (27%) and freshness (26%) were also top of mind.

20% of the respondents mentioned the source of food as one of the top three things that matter most to their family and one in six specifically called out locally sourced as being important.

Area Residents Obtain Food Locally. Top locations for obtaining food include local grocery stores (97%) and local restaurants, cafes and bars (61%). More than half (52%) grow/raise/hunt their own food or have family members who do. One in three (33%) are getting food from farmers markets; and 28% are getting food directly from local producers and ranchers.

42% say that 90% or more of their food is purchased locally, and 30% say that 60-89% of their food is purchased locally, on average. When asked how they define "purchased locally", the most frequent response was local stores (73%), followed by local producers, including farmers markets (19%).

> "Purchased locally means my hometown or the next city closest and local farms." — Baker resident, age 25-34.
>
> "I define 'purchased locally' as a local small town grocery store, local small town meat market, farmers market. Occasionally shops at larger box store when unable to purchase in small town stores." — Terry resident, age 55-64.
>
> "It means from a store in town, meat processed by the butcher in town and meat raised nearby. All purchases but ones made online from a big retailer and shipped to my home." — Scobey resident, age 35-44

Big Box Retailers and Online Sources are Also Important. Residents are also buying food in bulk or online. Two in three (65%) purchase food from big box retailers. One in five (20%) are getting food from Amazon or other online retailers and 13% are getting from online food delivery services.

What's Working: Having Access to Local Stores and Multiple Sources. When it comes to getting food, having access to local stores is mentioned most frequently by residents as something that's working well. Many respondents use and appreciate a variety of sources to get food, including their local stores, growing/raising/hunting their own, sourcing directly and locally from ranchers and producers, plus buying in bulk at big box stores or shopping online.

What's Not Working: Affordability and A Variety of Food. The affordability of food, plus the availability and variety of food, are the top topics mentioned when it comes to what's not working well for area residents.

Area Residents Want to Obtain Locally/Regionally Produced Food. There is a significant demand for increasing access to locally/regionally produced food that is locally sold.

- 28% are currently getting food directly from local producers, but more than double (57%) would prefer to access food that way.
- Only 1 out of 3 (33%) are getting food from farmers markets, but nearly 2 out of 3 (61%) would prefer to access food at farmers markets.
- Only 8% said they get food from co-ops, but 24% are interested.
- Only 4 people (1%) said that they get food from a CSA, but 60 (19%) are interested.

There is also some interest in food trucks and buying clubs.

- 11% are getting food from food trucks; 18% are interested.
- 6% are getting food from buying clubs; 10% are interested.

Consistencies in Current and Preferred Sources. Some food sources are consistent with how people are currently accessing them and how they would like to access them.

- Most of the respondents or their families who want to grow/raise/hunt their own food are doing so. 52% are getting food from those sources; 58% would like to.
- 24% are getting food from friends/neighbors who sare; 29% would like to.
- 13% are getting food from online delivery services; 14% would like to.

Interesting Disconnects among Current and Desired Channels. Interestingly, there is a decrease in interest in accessing food at local grocery stores, big box stores, gas stations, convenience stores, Amazon and other online retailers, as well as restaurants, cafes and bars.

- 97% are getting food from local grocery stores, but only 81% would prefer that way.
- 65% are getting food from big box retailers; but only 27% would prefer that way.
- 61% are getting food from restaurants, cafes and bars; 34% would prefer that way.
- 26% are getting food from gas stations, convenience stores; 6% would prefer that way.
- 20% are getting food from Amazon and online retailers; 7% would prefer that way.

Some of these disconnects may be attributed to the challenges that area residents' have with the existing grocery stores and the existing restaurants, cafes and bars. For example, when residents were asked if there were any specific types of food-related businesses that they would like in their area, the top two themes were better restaurant options and better grocery store options.

For restaurants and cafes, they want more variety and healthier food; family friendly options; longer hours; and places that are open seven days a week. For grocery stores, respondents noted that they would like more selection, cleaner stores, more competitive prices and regional chains.

Also, when considering what matters most to area residents when it comes to food—e.g., affordability, quality, healthy/nutritious food, and availability—these disconnects between current channels and desired channels make sense.

94% are Interested in Purchasing Locally/Regionally Produced Foods and Ingredients. 94% of the respondents are definitely or probably interested in purchasing foods and ingredients grown/raised/harvested within 3-4 hours of their home, as defined in the survey.

For now, they buy what they can get when they can get it. The most popular locally/regionally produced food purchased by the region's residents include: vegetables (79%), eggs (74%), beef (73%), honey, jams, etc. (56%), pork (46%), jerky, sausage, etc. (45%), fruit (43%), chicken (37%), and grains, flour, and breads (36%).

Reasons to Buy or Not to Buy: Availability, Cost, Convenience and Access. When it comes to better understanding why residents decide whether or not to purchase locally/regionally produced food and ingredients, there are a few common factors: availability (60), cost (34), convenience (30) and access (18).

Availability was the most frequently mentioned theme among both those who purchase locally/regionally produced food and ingredients and those who do not. Two other common themes for both those who purchase locally/regionally produced and those who do not was cost and convenience. Some respondents noted that locally/regionally produced food was fairly priced and less expensive and convenient; and others noted it was too expensive or cost prohibitive and not convenient.

#1 Reason for Purchasing Locally/Regionally Produced Food is to Support Local Producers. Among the 176 respondents who said they have purchased locally/regionally produced food and ingredients, nearly half (48%) noted that supporting local producers was their main reason.

> “We would love to have more locally grown produced options available and would love to support local people.” — Circle resident, age 35-44

Comparing the open-ended responses to what matters most to residents when it comes to food and the open-ended responses as to why they purchase locally/regionally produced food, the top themes are consistent as noted below. Essentially, locally/regionally produced food reflects what’s important to area residents when it comes to their food.

Table 11. Comparison of Why Residents Purchase Local and What Matters Most

	Top Reasons Why Area Residents Purchase Locally/Regionally Produced Food			**What Matters Most to Area Residents When It Comes To Their Food**
#1	Support Local Producers		#1	Affordability
#2	Better Quality		#2	Quality/Safety
#3	Known Source		#3	Healthy/Nutritious
#4	Freshness		#4	Specific Types of Food
#5	Better Nutrition/Healthier		#5	Availability
#6	Availability		#6	Freshness
#7	Locally Sourced		#7	Food Source/Locally Sourced
#8	Cost: Fairly Priced/Less Expensive		#8	Variety
#9	Convenience/Access		#9	Taste
#10	Tastes Better		#10	Access

The Region’s Residents Want Locally/Regionally Produced Produce and Meat. When asked what types of locally/regionally produced food and ingredients that they would like to purchase, here’s what was top of mind for area residents: vegetables (65); fruits (58); meat and beef (33); baked goods and bread (17); and produce as a whole (16).

Residents want Local/Regional Products to Be Convenient or Direct from the Source. The places most frequently mentioned as to where respondents want to purchase local/regional food products include: grocery stores (47); farmers markets (40); local stores or markets (24); and direct from the producers (19).

Residents are Interested in a Regional Food System. For the purposes of the survey, the study team used a USDA definition of a regional food system from 2015: “place-specific clusters of agricultural producers of all kinds—farmers, ranchers, fishers—along with consumers and institutions—engaged in producing, processing, distributing, and selling foods." Nearly half of the respondents are definitely interested (46%) in a regional food system and another 34% are probably interested.

Barriers & Opportunities: Key Takeaways

Universal Struggles and Eastern Montana Resilience. Some individuals and families struggle to access healthy, nutritious, fresh food. Some farmers and ranchers struggle to be fairly compensated for what they produce. Some retailers struggle to find a reliable and skilled workforce. None of these are anomalies for eastern Montana, and Eastern Montanans are resilient. There is an undercurrent of can-do culture, coming together to help one another and to celebrate at community and sporting events.

In general, Eastern Montanans are used to looking out for each other, especially in extremely remote areas. Among the 176 respondents who said they have purchased locally/regionally produced food and ingredients, nearly half (48%) noted that supporting local producers was their main reason. People are also often resourceful and will make the most of what they have.

> "We need to focus our food system on being closer to home. The world is going to get hungry."
> —Retailer interviewee

Population Size. One aspect of eastern Montana that may be noted as a challenge is that the area served by the Eastern Montana FADC has less than 50,000 people. The limited workforce and limited pool of community volunteers have real impacts. However, there are more direct connections across sectors with farmers and ranchers, as they are typically neighbors, fellow parents or former classmates or co-workers, friends, relatives. This sense of community — this reality of community — can be an asset.

Issues of Scale. One of the biggest barriers to local/regional food system development involves issues of scale. Most producers in this region operate at commodity scales, while local/regional food systems operate at a smaller scale. This creates several points of dissonance:

- For producers who sell by the semi-load, a local operation needing deliveries by the barrel doesn't easily fit their production model.
- With the majority of in-region producers' experience and knowledge coming from agriculture at larger commodity scales, there is less in-region knowledge to guide farmers and ranchers seeking to diversify their operations with smaller scale production.
- For community members looking for "big dollar economic development solutions", it can be tempting to dismiss smaller value-added operations as "quaint", "idealistic", or just "too small to matter."

Recognizing and accepting these tensions will make the development of local/regional food systems more feasible, as the reality *is* complicated. Meanwhile, opportunities to promote value-added ventures — as well as opportunities to share the knowledge of successful produce-producing greenhouses, market gardens, and mixed-crop produce farms — are increasing.

Communication Challenges and Word of Mouth Solutions. Communication challenges also exist in eastern Montana. Several online survey respondents noted not knowing where to find locally/regionally produced food as a reason why they hadn't purchased it. But word of mouth is also strong in this area and gathering information from neighbors and friends is an important component to solving problems. For example, as explained by one interviewee, if a farmer or rancher is trying to figure out how to

transport or process something, the first two places they'll go are the local bar and the local coffee shop. Conversations at those and other community locations help eastern Montanans figure out which rumors are most likely true.

> "I have purchased locally grown meats because of county fair livestock auctions or purchased animals from family or neighbors for butcher. I have not purchased locally grown produce because I do not know how to access it. I recently learned how to order from the Vida Fruit truck and intend to order from there in the future." —Vida resident, age 25-34

Local Isn't Always Easy. For area residents wanting to buy locally, finding local food options isn't always convenient or consistent. For example, buying locally can often mean buying in bulk — i.e., a quarter of a cow — and that's not always feasible or financially viable. Another example: some foods can only be purchased in-season, and many people are used to getting what they want when they want it.

Plus, preparing local, healthy food isn't always the easiest thing to do. As one survey respondent from Wolf Point noted, "Young people need to be taught how to harvest, prepare and process food for storage, how to reconstitute it for meals and how to cook it. I see so much fresh garden vegetables thrown away because the young do not have canners, jars, and spices and then don't want to learn because it costs too much to start! They get discouraged and do not want to do a garden the next year."

People want and need things to be easy, whether that's someone who needs to feed their family; a producer who needs to sell their beef; or a grocery store, restaurant or food truck operator who needs to decide which food sources to use.

Selling direct-to-consumer may not always be the most efficient way for farmers and ranches to sell. As one interviewee outlined all of the steps needed to take to get a premium price for their beef — i.e., processing it, packaging it, shipping it, it was apparent that it wasn't a simple approach. It can also be expensive to build a brand, create awareness and demand, develop direct-to-consumer channels such as a website, social presence, etc., and then drive traffic to the website. It's not as simple as "build it and they will come." Yet, ranchers and farmers have successfully navigated these challenges and have found success in selling direct.

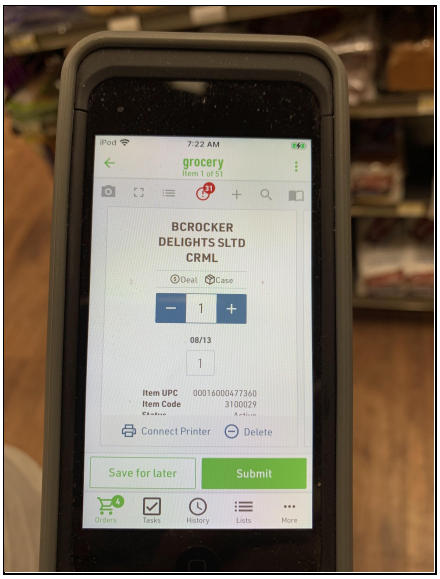
Sysco Truck Delivery at Garfield County Health Center in Jordan. October 2021.

Buying directly from local producers isn't always practical for restaurants, cafes and bars. As an example, one restaurant interviewee noted that they could only prepare and serve local roasts or ground meats, because deli meats such as pastrami (and other cuts) aren't available locally due to lack of processing capabilities. Another interviewee summarized, "It's easier to buy off of Sysco." But that doesn't mean they aren't willing to buy from local producers. As one interviewee shared, "I want to support more ag around here."

Supply Chain Disruptions. Supply chain disruptions have been experienced throughout the region. One interviewee couldn't get lids for the coffee cups they were using to serve customers; and one of the grocers interviewed shared that they had 31 items backordered from their distributor. Yet, they also have the attitude that they'll figure it out.

> "I'll make it work. I'll find what I need somewhere. I'm not having troubles with my regionally and locally sourced items — just nationally." —Retailer interviewee

Processing. As noted earlier in this study, lack of processing and processing availability is a challenge for the area served by the Eastern Montana FADC. This topic will need to be continued to be addressed as the realities of a more robust local/regional food system come into fruition.



Backordered List, Hometown Market in Culbertson. October 2021.

Examples of Existing Innovations & Potential Ideas

This section offers in-region examples of innovation at various scales, as well as case studies from similar regions, and ideas for new business ventures that were of interest and might be viable.

Table 12. Examples of Local/Regional Innovations — Within Eastern Montana FADC
Examples of local/regional food system innovation from within this 11-county region.

County	Brief Description
Valley	→ In Hinsdale, the Farm to School program features a passive solar greenhouse, outdoor classroom, and root cellar. In a typical year, gardens produce over 700 pounds of seasonally produced food for the school lunch program. FFA advisor Patti Armbrister began directing Hinsdale Farm to School in 2009. (Independent Record, 10/27/2018 updated 1/23/2019; Hensler, 10/2014) → Milk River Inc., a non-profit dedicated to helping individuals with developmental disabilities reach their highest level of potential and independence, incorporated gardens and a licensed kitchen into their Activity Center. → In early 2021, many convenience stores faced shortages of ready-to-eat sandwiches. Nikki Clein, manager at the Hinsdale Raiders Quick Shop/Izzie's, worked with an entrepreneur in Malta to offer locally made sandwiches.
Daniels	→ Farver Farms adds value to wheat and lentils grown in northeastern Montana in a certified kitchen located in Scobey. Products distributed in-region and beyond Montana. → Lefse Shack moved from Opheim to Scobey in 2018. Product distributed in-region and beyond Montana. Uses flour from Great Falls, potatoes from Kinsey.
Sheridan	→ In 2019, an AmeriCorps volunteer helped transform the local summer lunch program into a fun, family-friendly weekly event. With crafts, games, made-from-scratch offerings, and special visitors that ranged from the local fire department to farm animals, a secondary impact of this effort was to help reduce the stigma of food insecurity for vulnerable kids and families. → Rueb's SuperValu recently transferred/sold to the next generation, and reports carrying meat from a local processor (Eastern Montana Meats).
Roosevelt	→ At Fort Peck, community members are working to reconnect people with traditional foods and increase the availability of locally sourced foods. On 12/2/2021, Fort Peck Food Sovereignty Day offered an opportunity to learn about the bison hunt offered to reservation schools, a curriculum module at Poplar Middle School students that increases attendance, traditional recipes, and more. Meals featured ingredients like wild rice, corn, squash and bison; speakers included youth, elders, members of the Pté Group, and local gardeners (among others). → Developing commercial kitchen to support community garden at FPCC, received small grant to develop food/ag courses for dual-enrolled students (HS/CC).

	→ Salad bar in Poplar schools. → In Wolf Point, caterer Janice Bowman (Bowman Enterprises, Inc.) constructed a greenhouse and incorporates her locally grown produce into the foods she prepares.
Garfield	→ Jordan Public Schools serve 100% local beef. Billings Gazette, 4/23/2016 → In My Plants greenhouse delivers their locally grown produce to Ryan Grocery twice per week, and the produce typically sells out by evening.
McCone	→ 41 Grains' is working to turn local pulses and grains into products Montanans can eat, such as chickpea flour. Product launch anticipated soon.
Prairie	→ Hatchett Creek Farms converted sagebrush and crested wheatgrass pasture into a successful 3 acre market garden, selling produce on site, at the 4-Corners Convenience Store in Terry, at Miles City Farmers' Market, and in Baker.
Dawson	→ Founded in 1998, Glendive's multifaceted Farm to Table initiative put forward a vision: build a sustainable local food system for eastern Montana. This evolving initiative involves many pieces, including: ● The Farm-to-Table Store, a pathways for local producers to sell their products to local buyers and for community members to access locally/regionally produced products ● The EPEC kitchen, to be rented by entrepreneurs, caterers, community groups and others ● Glendive Community Gardens, which produce enough that some produce makes its way into local restaurants ● Glendive Farmers Market ● Producer Co-op, which is in the process of dissolving to allow restructuring and updated objectives ● Community GATE, which provides a non-profit umbrella for pieces of the vision and has provided significant volunteer support The Farm to Table Initiative hit a setback when one of its founders passed away in 2019. A commitment to evolve this work remains, and a new generation of community leaders is interested in helping local producers add value and get their products to market.
Wibaux	→ Beaver Creek Brewery, Gem Theatre & Pub incorporates locally/regionally produced foods and ingredients.
Fallon	→ Plevna Schools participate in Harvest of Month program. → Geothermal greenhouse, Molly & Todd Barkley → Eastern Montana Regenerative Agriculture (EMRA) considering CSA and other cooperative marketing options.
Carter	→ Ijkalaka Grocery can seem like an anomaly: a new grocery store in a county with only 1,415 people, in a town of 384, while other towns struggle to find buyers for existing grocery stores. Opened September 2021 (Ekalaka Eagle, 9/17/2021), Ijkalaka

	Grocery is not the only new business in this corner of Montana. There are several reasons for this trend, plus a critical ingredient: "...people who've chosen to put persistent sweat and occasional tears into making this a place worth being instead of just being from." — Growing Home in Ekalaka, 10/6/2021 → Ty & Sarina O'Connor are building an integrated operation, from production through processing to retail sales. The latest addition to OCC Crops & Cattle, OCC Legacy Cuts is TSO Cantina, opened December 2020. (Ekalaka Eagle, 12/11/2020) The O'Connors anticipate opening a new USDA facility licensed to process organic and conventional beef in 2022.
Sidney	→ Eastern Montana Meats in Sidney (USDA) supplies some grocery stores in region.

"Oh Yeah Store" in Vida, Montana. October 2021.

Table 13. Examples of Local/Regional Innovations — Located Nearby
Examples of local/regional food system innovation from adjacent or nearby regions.

Location	Brief Description
Montana	→ The People's Food Sovereignty Program installs over 50 garden beds across the Flathead Reservation: Char-Koosta News, 7/8/2021. → Northwest Food Hub Network, a collaboration founded by three cooperative, farmer-owned food hubs, makes it simpler to access healthy, wholesale local foods from over 200 sustainable farms in Montana, Idaho and Washington. → School House Meats, located at Missoula County Public School Agriculture Center, teaches students from Big Sky, Hellgate and Sentinel High School students. Completed in 2019, the facility helps this 100 acre farm turn a profit for the school district by adding value to the meat students help raise and process. Missoula Current, 10/12/2021; Missoulian, 6/22/2019 → Old Salt Coop: multi-faceted, large-scale effort to capture greater value from Montana-raised cattle. Blackfoot Valley/Helena area. One piece: Old Salt Outpost. Presentation describing this effort: Expo 21: New MT Food-Focused Cooperatives (minutes 32:25-48:35, plus Q&A) → Winnett ACES (Agricultural Community Enhancement and Sustainability) formed roughly 5 years ago.

	"Within 2 months we were serving locally produced beef in our school. And the good thing about it is that you have to wait 2 years for the opportunity to give a beef to the school." — Chris King, local rancher, Reimagining Rural presentation, 10/4/2021 (minutes 9:35-10:20) ➞ RegenMarket is a new "membership based online store featuring Montana-grown beef, pork, lamb, plant-based proteins & honey." Big Sky High School ➞ Master Gardeners created new gardens, planted fruit trees, built raised beds, attracted community volunteers who are first-time gardeners, and intend to donate produce to food banks. MSU News Service, 8/11/2021 ➞ The Produce Market (Billings) specializes in fresh produce and locally/regionally sourced products. Billings Gazette, 12/15/2020. KTVQ, 1/16/2021. ➞ The Farmers' Stand in Flathead County launched in 2021 to enhance market channels and increase farmers' share of profits. First-hand account of launching this business can be heard in this recording (minutes 19:25–29:01): New Markets Through Collaboration.
ND	➞ Between 2014 to 2020, full service grocery stores serving small communities in North Dakota dropped from 137 to 103. In 2016, NDAREC (ND Association of Rural Electric Coops) launched a series of efforts to support fresh food availability in small town grocery stores. E.g., "Homegrown Revolution" (short video) and ND Small Farms (website). "It's easier to get local produce into stores than most people think. We're trying to get rid of those myths that there's a lot of regulations or that it's illegal under health standards to purchase and sell local produce. We want to show grocers and growers how easy it is by simplifying the process of figuring out the regulations so they can make those connections." — Lori Capouch, NDAREC, (NDAREC 7/17/2020) ➞ North Dakota Hunger Free Garden Project, founded a decade ago, had facilitated the donation of 2.8 million pounds of produce across North Dakota by the end of 2019. In 2020, 600,000# of produce was donated. Donation sites are primarily food pantries, but also include group homes, head start programs, etc. Their map shows donation sites near the Montana border in Marmarth, Beach, and Williston.
MN	➞ White Earth Nation purchases food truck to offer mobile grocery and healthy foods to areas with little access to locally produced, healthy, traditional foods. Montana Public Radio, 7/27/2018.
PA	➞ Table Rock Markets Direct-marketing platform for farmers. Given that 161,953 people live in just Centre County, this is not a direct parallel. However, it is a reminder that motivated youth can do more than is often recognized. Lancaster Farming, 11/26/2021

Business and Product Ideas from Community Members

Throughout the study, people expressed interest in a range of businesses that they would like to see in their community, or mentioned business concepts that they felt would be worth exploring. The below list is not intended as a comprehensive list, and the feasibility of each idea would need to be assessed within the context of place-specific factors.

Potential ideas shared included:

- Locally milled flour
- Aquaponics
- Geothermal greenhouses, specifically due to reduced wind damage and decreased energy use/cost
- Composted slaughterhouse waste
- Healthy, fresh, home-cooked food. Many people expressed interest in alternatives to preparing their own meals, and indicated that they are tired of eating pre-made/reheated foods when they go out. Ideas mentioned include:
    - New fresh/healthy options within existing establishments
    - New establishments dedicated to healthy/fresh/local/scratch cooking, such as:
        - Food trucks
        - Deli or restaurant
        - Catering
        - Meal delivery service
- Mobile grocery store
- Added-value meat products

As part of the online survey, respondents were asked if there were any specific types of food-related businesses that they would like in their area. Some had detailed suggestions:

> “I would like a butcher, a baker, a delicatessen that sells not only cold cuts and fresh cheese and dips, but one that also sells fresh made sandwiches and daily soups that has sit down seating, but not located in the grocery.” — Plentywood resident, age 35-44

> “We need a better attended Farmers Market. It would be amazing to have a pavilion in town with electricity for ranchers to bring beef/pork/chicken/venison and sell direct to consumers. A better way for farmers to feel like it would be worth their time to bring items in... We also just need a really good steak house. The restaurants here seem to order from Sysco and don't take advantage of locally grown food or beef. Things aren't fresh. There needs to be more of a farm to table take on restaurants here.” — Glendive resident, age 45-54

> “More fresh food options from locally owned operators. I'd love a burrito restaurant, juice/smoothie place made without syrups, Taco food truck, bakery food truck, Italian (pasta) restaurant. Our community is blessed with all of our bars but their food is similar (deep fried items, burgers, pizza) so it would be nice to see something different and on a healthier level. I would support any locally owned food business but not franchises. Maybe there are grants to use as incentives for local people to open their own food service? — Baker resident, age 35-44

Below is a summary of ideas shared from the survey. Given the qualitative nature of the survey, these ideas should be considered directional and provide some insight but are not necessarily a statistical representation of what area residents would like.

Table 13. Food-Related Businesses Wanted in the Area

Theme	Number of Mentions
Better restaurant options (i.e., longer hours, 7 days/week, more variety, better food, family friendly, etc.)	35
Better grocery store options (i.e., more selection, cleaner, more competitive prices, regional chains, etc.)	25
Ethnic options	22
Bulk buying options (i.e., big box stores)	21
Butchers/meat shops	21
Bakeries	19
Locally grown/raised options	19
Inexpensive, convenient, ready-to-eat options (i.e., fast food)	18
Organic/natural food stores (i.e., Whole Foods, Good Food, 2Js)	14
Fresh produce options (i.e., fruits, veggies, etc.)	15
Healthier restaurant options	11
Bountiful Baskets, produce trucks	11
Farmers Markets	9
Co-op food stores	9
Coffee shops	5
Delivery options	5
Delicatessen	5
Anything	4
Seafood, fish	4
Catering, packaged meals	4

Recommendations

OVERALL THEMES

The rewarding but complex challenge of supporting local/regional food systems and value-added food businesses in remote eastern Montana will require patience, tenacity, collaboration, and creative, solution-oriented energy.

Overarching recommendations for the Eastern Montana Food and Agriculture Development Center (Eastern Montana FADC) and its partners include:

- Start small, help individual businesses and co-ops move forward one step at a time.
- Support communication and gatherings that help “connect the dots” across sectors, institutions, and eastern Montana’s vast distances.
- Help people work through inevitable challenges/barriers. Offer steady, practical, positive coaching.
- Find ways to build capacity for the facilitation and coordination needed to sustain and navigate collaboration.
- Reinforce and expand in-region interest in fresh, local foods by partnering with agencies, businesses, and community groups to offer a range of educational opportunities, celebrate successes, honor volunteers and citizen leaders, and tell the stories of value-added food and ag-related endeavors.

IMMEDIATE/SHORT-TERM RECOMMENDATIONS

To get started, here are a few immediate, short-term recommendations based on the preliminary findings from this study:

- **Collaborate with the MCDC team evaluating feasibility and developing a business model for enhanced rural & tribal food distribution**.
  In 2022, Montana Cooperative Development Center (MCDC) will evaluate the feasibility and develop the business model for a network that supports food availability in reservations and remote communities. This network is expected to include food distribution or aggregation centers of various types, as/where needed, to facilitate viable operations and maximize transportation efficiencies (including opportunities for back-haul). Work with contractor Linda Howard in 2022 as she leads this work for MCDC.

- **Continue to support the emerging storage co-op**.
  Producers who attended the Local Meat Market & Processing Workshop on November 3, 2021 began discussing their challenges with food storage, distribution, and shipping. The potential for a licensed meat depot, with additional storage and aggregation/shipping/distribution capacity growing over time, is a practical cooperative approach to solving challenges faced by remote producers.

- **Continue to participate in the Farm to Table Co-op transition**.
  Continue to collaborate with the Farm to Table Co-op and the Montana Cooperative Development Center (MCDC) as the Co-op dissolves and evaluates transitioning to a new co-op

structure. Formation of a steering committee to define the need, the potential, goals, and clear short-term objectives — as well as outline possible long-term objectives and how this entity relates to other organizations – will be an important process. If funds are available to hire a facilitator/coordinator to work with co-op leaders on this process, above and beyond existing leadership and support from MCDC, work with existing and potential Co-op members to affirm that this would be valued. If yes, determine how this role would be defined, hired, and managed.

- **Continue assisting entrepreneurs seeking to build viable value-added food & ag-related businesses**.
  This is central to the work of both GNDC and EPEDC, so this recommendation may seem obvious. None-the-less, recognizing the invaluable services offered by these two partners in the Eastern Montana FADC is important. Their work to assist entrepreneurs, such as 41 Grains and the two ventures seeking to market hemp products described in EPEDC's July 2021 Newsletter, is critical.

- **Incorporate new contacts from online survey into Eastern Montana FADC database.**
  Communication is critical in creating awareness, building networks, and connecting people to opportunities. Nearly 250 survey respondents agreed to be contacted by Eastern Montana FADC and provided email addresses and other contact information in the online survey. The project team recommends incorporating those contacts into the existing database, tagging them appropriately, and setting up a multi-step communication plan to reach out to them. Email topics could include: thank you for participating in the survey, with information about Eastern Montana FADC and what services are offered; welcoming them into the Eastern Montana FADC, introducing them to your newsletter(s) and upcoming trainings. After these steps, then incorporate these new contacts into ongoing communications from Eastern Montana FADC (unless they opt out).

- **Continue to promote trainings that may be of interest**.
  - January Lunch & Learn: Montana Agritourism Webinar Series.
    Toole County Extension is working with Montana Agritourism to host a series of webinars on Tuesdays from 12-1 PM throughout January, beginning January 4, 2022. Topics: Introduction to Agritourism, Production Options and Practices, Business Management for Agritourism Operators, and Communications and Marketing.

  - "Bringing the Farm to School" training for Montana producers, planned for 2022 but not yet scheduled. This training will be coordinated by the Montana professionals who attended "Bringing the Farm to School Agricultural Producers Training Program: Mountain Plains Regional Facilitator Workshop" in October, 2021. Contacts: Montana Farm to School (Aubree Roth), National Center for Appropriate Technology (Tammy Howard).

  - Certified Farm Startup Program
    This free training uses performance-based teaching methods to deliver the skills and tools needed to access farmland and to start, or improve, a farm business. Designed for new farmers and/or those seeking to diversify, the curriculum covers new and innovative production techniques, business planning, financial & risk management, and strategies

for diversification & marketing. Training runs March through September 2022. Applications due by February 15.

- National Rural Grocery Summit in Wichita, Kansas, June 20-21, 2022.
  - Offer to underwrite grocers in the region to attend. "The National Rural Grocery Summit is the premier networking and resource-sharing venue for independent grocers and rural food access stakeholders. It brings together grocery store owners and managers, community leaders, food suppliers, academic researchers, healthy food access stakeholders, policy makers, and funders to connect, share lessons learned, and innovate around best practices for sustaining locally-owned rural grocery stores and improving access to healthy food in rural communities." www.ruralgrocery.org/events/RuralGrocerySummit.html
  - Consider presenting at this conference with a local grocer (e.g., a business sourcing produce or beef locally, familiar with challenges and opportunities). Call for proposals will be issued later this fall, and registration will open in early 2022.

- Understanding Montana's Local Food Choice Act.
  Initial workshops held in November 2021 can be accessed here: Food Product Liability Workshop Series. Overview: Food Safety News, 4/30/2021. Additional workshops planned.

- Montana Organic Association (MOA)
  MOA offers training for producers and other professionals to learn how organic certification and production could work for their operation. 2022 dates for Organic University have not yet posted, but recordings from the virtual training offered in 2020 are available: 2020 Organic University: Virtual

❖ **Leverage in-region events.**
Gatherings are part of eastern Montana's culture, and an important part of the social fabric. Listed below are two ways to leverage events to support the local/regional economy, promote local foods, and increase awareness of regional food systems' benefit to communities.

- Work with existing events to feature local ingredients.
  Established events such as the annual dinner on the Wolf Point Bridge would be excellent places to feature local ingredients. Increased presence of local foods in events that are not necessarily focused on food & agriculture helps cross-promote and normalize the use of local/regional ingredients.

- Explore the potential to host an annual or bi-annual event.
  An event dedicated to celebration of local food and agriculture offers the opportunity to recognize specific accomplishments and highlight particularly powerful or important food system stories. It's also a fun way to network, build understanding, strengthen community, and promote local brands.

  Trestin Benson-Feagler is working with the Glendive Chamber of Commerce to host a 'harvest feast'/field dinner in 2022 with white table-tops, home-style locally prepared

dishes, and speakers. This event is likely to focus on diversifying operations, starting small, and include discussion of agritourism. Participate in planning and promotion of this event, and make time to debrief the event and then build from this to design and organize future events.

LONG-TERM RECOMMENDATIONS

- **Offer engaging educational opportunities: trainings, workshops, tours**.
  Trainings provide opportunities to gain skills, learn, network, explore what's possible, and bolster motivation. The Local Meat Market and Processing Workshop held 11/3/2021 is one example. Even if the Eastern Montana FADC doesn't organize or host these trainings, workshops or tours, it can help promote food & ag related opportunities. Below is a list of educational opportunities that came up through the course of this study. Eastern Montana's ability to host, co-host, support and/or promote these opportunities will benefit this region.

  - Leadership. The presence of a "champion" or team of motivated people who can lead or co-lead coordination, support collaboration, and maintain the vision/motivation for a specific endeavor is invaluable. The soft skills employed by "inspiring doers" are often unnoticed, yet dramatically increase the chance of success. There are several programs offering support for rural leadership and active citizenship listed in Appendix: Resources.

  - Farm tours. The FSA office and other agencies used to lead tours, hiring a bus to visit different farms/ranches/project sites. Developed and promoted by a range of grassroots and official channels, tours offer a tangible look and chance to discuss ways to diversify an operation, new ideas, and the nitty-gritty of an operation. If a topic is important but interest is low, a tour can incorporate other interesting stops (even if not directly on-topic) to broaden the appeal and encourage broader participation. Tour theme ideas that surfaced during this study include: ecotourism; geothermal greenhouses (and other active greenhouses); added-value facilities; school gardens and kitchens; community gardens; mixed destination, based on timing/opportunity/enthusiastic hosts; less input-driven weed control, etc.

  - Agency-led programs. Programs that can help build in-region capacity for growing food include programs often run by MSU Extension, such as master gardener programs, community/school garden groups, and "cooking/preserving local foods" workshops. Fort Peck Community College and other entities also offer valuable programs, workshops, and summits/conferences.

  - Workshops & trainings. Increasing in-region knowledge and expanding connections with people doing good work in-region and elsewhere is important. As the November 3, 2021 Local Meat Markets and Processing Workshop demonstrated, the connections made and information shared can lead to new ventures. Being in touch with individuals from across the region, in various sectors, will help the FADC determine what topics are timely.

  - Local Food Leader Certification. A partnership between Iowa State Extension and MSU Extension allowed this program to be offered in Montana for the first time in 2021. MSU

Extension agents will evaluate this inaugural training, modeled after Iowa State's LFL Certification, and plan to adapt the curriculum for future program offerings in Montana.

- Farm to Institution. Build upon the "Bringing the Farm to School" training to be offered in 2022. Consider researching and partnering with other Montana entities to develop a similar training for hospitals and other institutions.

❖ **Support the evolution of local food initiatives in the Glendive area.**
Many in the Glendive area are familiar with the multi-faceted vision promoted by former Glendive County Extension Agent Bruce Smith. Supported under the umbrella of Community GATE, the original vision included multiple pieces, some of which exist:

- Farm-to-Table Store
- Shared-use Community Kitchen at the EPEC
- Community Garden
- Glendive Farmers Market

Other pieces of the vision have not yet developed:

- Incubator program to support entrepreneurs building food, ag, and added-value businesses
- Effective marketing of local/regional sustainable food businesses and products
- Culinary arts program with ties to farm-to-table restaurant(s)
- A food hub in Glendive to serve eastern Montana and western North Dakota.

As local and regional food systems re-emerge and develop across the country, it's increasingly clear that a multi-faceted vision like this rarely occurs "under one roof." Collaboration is essential to empower different entities — from local community colleges to local businesses to community development agencies to local farmers/ranchers and producer co-ops — to align their programs and expertise in ways that amplify beneficial impacts to the local economy, community health, and food availability. Consider the roles that the Eastern Montana FADC will play in this evolving, multi-faceted initiative.

> "The whole is greater than the sum of the parts."— Aristotle

❖ **Evaluate the role Eastern Montana FADC will play in supporting eastern Montana's loose network of local food & ag leaders**. Opportunities to come together, to discuss opportunities and challenges and new developments, can be invaluable. Eastern Montana FADC could provide support and facilitation, and/or work with motivated community members to develop that capacity within another organization.

Given the history of displacement, genocide and discrimination that continues to impact individuals and community relationships, an authentic commitment to continue to strengthen, develop and nourish relationships with Fort Peck members is vital. For Eastern Montana FADC, open and respectful communication with individuals/groups demonstrating initiative in food, agriculture, food sovereignty, and eco/agritourism is essential to understand if/how/when

Eastern Montana FADC can support or partner with Fort Peck members working to enhance economic development, food security, and community health.

- **Explore pathways to enhance in-region workforce development**.
  Nearly every sector in remote eastern Montana is challenged to find and keep workers. Because low population is a real barrier, efforts to approach this challenge as a systems issue — looking at the entire context, including social factors and education/apprentice opportunities — is vital.

  Areas for further exploration, research & development in this region stood out during this study:
  - Hospitality: from convenience store clerk to agritourism, workers who interact with customers benefit from training. Could a certificate program add professionalism to "front desk" work? Would a campaign to honor & respect "everyday workers" as vital members of the community make a difference? ("Especially those who take their positions seriously," one person wryly noted.) If these positions don't offer a livable wage, what solutions exist that might be deployed or expanded within this region to shift consistently challenging situations?
  - Food Preparation, Agriculture, & Entrepreneurship: Fort Peck Community College (FPCC) is working toward new programming in horticulture/gardening, food preparation, food sovereignty, and related topics. Recently, FPCC received a small grant to develop new dual-enrollment classes, and interest in an expanded teaching/incubator kitchen exists. What resources exist that could be channeled toward these initiatives, allowing these programs to help address persistent health and food security issues?
  - Dawson Community College is located in Glendive, where significant investment in farm-to-table efforts persist. How might this institution partner with the network of agencies, businesses, individuals and organizations involved in value-added businesses, Glendive Community Garden, the EPEC Community Kitchen, and other efforts? How might DCC facilities or programs — at the club, course, and/or certificate level — support the development of local entrepreneurship and regional food systems?
  - Facilities such as Milk River Activity Center (Glasgow, has commercial kitchen) and Spotted Bull Recovery Resource Center (Poplar, has food preservation equipment) are examples of programs that could be evaluated as potential collaborators in the development of workforce development programming.

- **Develop a phased communication & marketing plan to reinforce in-region momentum toward increased availability of fresh and healthful foods, community health, and local economic resilience**. Potential elements of such a plan:
  - Partner with writers, photographers, podcasters and others, including students, to help local entrepreneurs tell their stories and help community members make the connection between food, health, community, and economic resilience.
  - Leverage emerging "local, sustainable, Montana-grown" channels for marketing, such as Abundant Montana (updates in progress). Consider partnering with AERO to fund an Abundant marketing representative & local food coordinator dedicated to remote eastern Montana.
  - Expand in-region marketing of local/sustainable foods and value-added agricultural products. Evaluate the feasibility of adding a directory to the Eastern Montana FADC website, or another website if another "home" for such a service would be more

appropriate. Consider embedding the Abundant Montana map/database as an iFrame, and/or develop a simple, visual way to differentiate meaningful categories of business, such as: locally grown/raised, locally processed, locally owned, co-op, organic, etc.

- **Continue to promote funding opportunities and assist with local grant applications.**
  GNDC and EPEDC already do excellent work promoting and helping community members submit grants to a wide variety of funding opportunities as they become available, such as GTA and ARPA. Two smaller funding opportunities designed to enhance food security that could be promoted by Eastern Montana FADC and/or their partners:
  - Growing Together Montana (GTMT) is a collaboration between the MSU Extension Nutrition Education Program and the Master Gardener program. GTMT provides grants to active Master Gardener volunteers with a focus on growing and donating produce to local food banks and supplying other emergency food resources. Master Gardeners also have the opportunity to work with SNAP-Ed instructors in their communities to deliver nutrition education to the individuals and families that utilize the food banks." (Blaine County Journal article, 8/25/2021)
  - Montana Farm to School periodically offers mini-grants. There is not an application process open at this time; watch for future opportunities.

- **Explore ways to enhance communication, planning and collaboration between Montana's Food and Agriculture Development Centers (FADCs)**.
  When the FADC network was established, the Department of Agriculture had a coordinator who worked with the network, and the work was less isolated. Given the truism that "Montana is a small town with long streets", monthly check-in calls and topic-specific calls may be insufficient to leverage the innovation that more deliberate coordination and strategic planning could support.

- **Initiate relationships with distributors interested in working with eastern Montana**.
  Quality Foods Distributing, Yellowstone Valley Food Hub, and Northwest Food Hub Network are interested in serving eastern Montana, yet current capacity and/or the time required to develop viable routes and partnerships will require long-term planning, coordination, and ongoing communication. Reach out to initiate direct communication, explore opportunities to build relationships (e.g., participation in workshops), and consider potential future partnerships.

Opportunities for Further Investigation and Consideration

This study uncovered opportunities that may warrant further examination and consideration, noted below.

- Review how Eastern Montana FADC currently evaluates its success. Consider how other experts evaluate and what metrics they use (e.g. Community Food System Assessment methods and tool kits.) Determine which easily obtainable and ongoing metrics and data Eastern Montana FADC is able to monitor and track to demonstrate success over time.

- Given the benefit of purchasing locally to local economies, food security and community health, consider researching what mechanisms have been employed to help institutions and individuals with limited income cover the “delta” between the cost of locally grown/processed foods and the cost of standard commercial products (e.g., Double SNAP Dollars).

- The deeper one works in food and health, the more jargon begins to sound normal. To support shifts in behavior, it’s valuable to understand what messages resonate for whom. Research to refine communication and marketing in-region can build from the survey done for this study, testing language offered by people in-region. This research could also test messages to see if they resonate, such as: “The USA spends less household income on food than any other country” (6.4% vs France 13.2%... USDA stat via Farver Farm website). Such a study could also conduct a thorough review of in-region food displays and signage.

- There is a significant amount of work, study and experimentation with in-store display techniques and how these impact customers’ purchasing patterns. Research cutting-edge, in-store display techniques and initiatives (e.g., “healthy corner store”, “healthy check-out”, “healthy retail”) and explore potential partnerships with in-region grocer(s) and others to sponsor a workshop. Such a workshop could be designed to include discussion with experts who can speak to trends, innovation, community relationships, impacts on health/sales, and the bottom line/triple bottom line.

- Deeper investigation into opportunities to add value to crops, crop byproducts or waste products that match production in this region would be valuable.

Appendix