



3RD GOVERNOR'S SUMMIT On Local Food & Agriculture

— Montana 2026 —



Free the Seeds Pre-Summit Regional Meeting

33x33 for Montana Initiative

2026 Governor's Summit
on Local Food & Agriculture

Welcome & Agenda

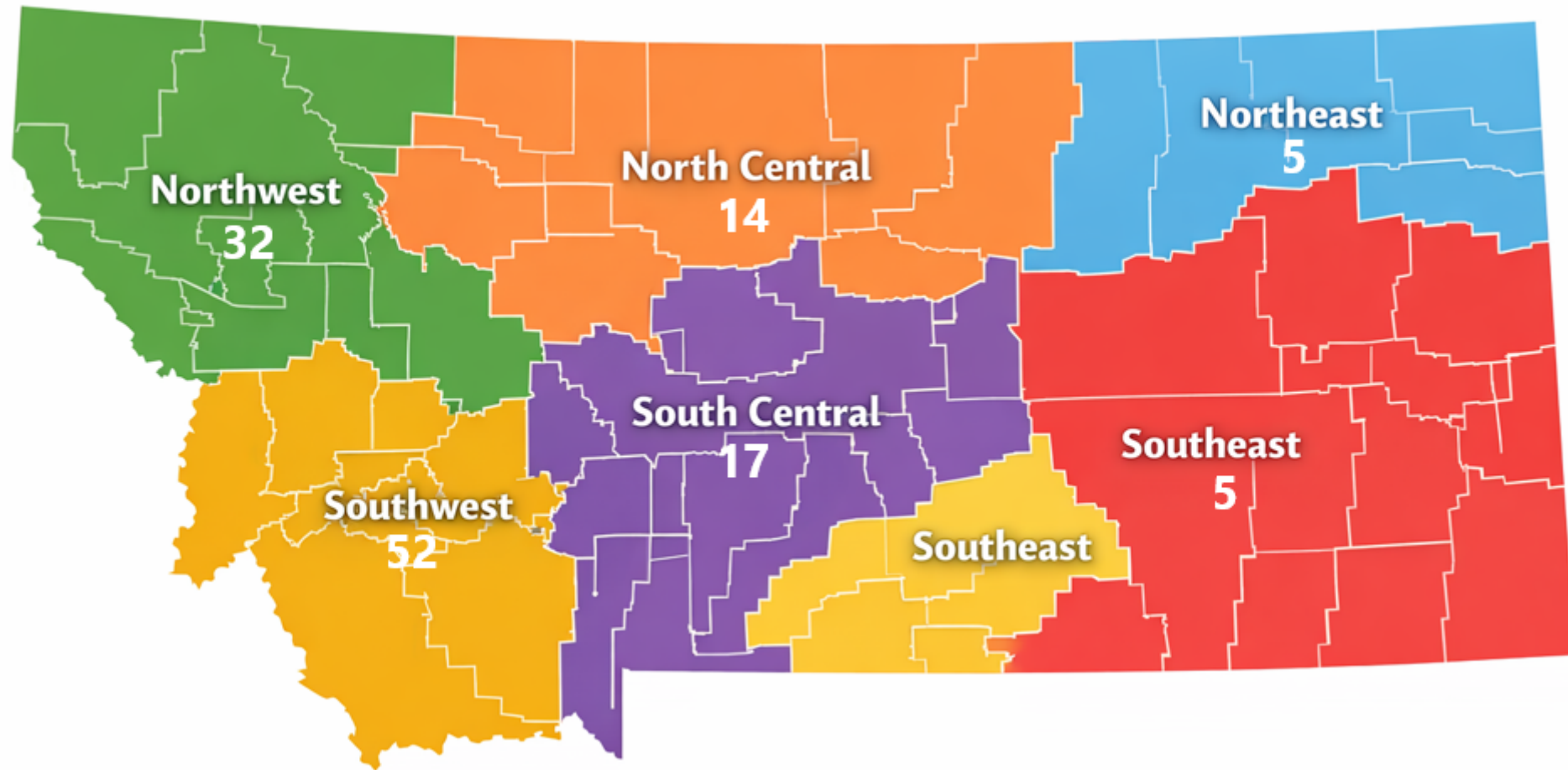
- Introductions
- Setting the stage
 - 33x33 for Montana
 - 2026 Governor's Summit on Local Food and Agriculture
- Let's hear from you!

Introductions

- Today's presenters / facilitators
- Raise your hand if...

Context

- In 1950, 70% of the food Montanans ate was grown in Montana. **Today, it's only 3%.**
- 3% → 33% by 2033 = 33x33 for Montana Initiative
- The Summit planning committee conducted a survey last year to get a basic understanding of the **major barriers and solutions** to increase the sale and consumption of Montana-sourced foods for Montanans



Total Number of Survey Respondents by Region
(more are rolling in too!)

Statewide Assets

What's working well? (Keep supporting the efforts below. This is our foundation!)

- **Education & marketing** efforts are increasing consumer demand for MT food
 - Abundant Montana, Harvest of the Month, Made in Montana, Buy Fresh, Buy Local
- **Direct-to-consumer** (DTC) access points are strong - i.e. farmers markets, CSAs, food hubs, farm stands
- **Retail signage** and labeling of "local" is increasing
- **Distributors**, especially WMGC and QFD
- **Co-op** development & increased aggregation
- **High quality food** is grown and made in Montana
- **Technical support** for producers, including the FADC Network
- **Grants & investments** into local food system and processing infrastructure (i.e. GTA, VAPG, etc)
- **A shared passion** for 33x33 and Montana food!

Statewide Barriers & Solutions

- **FUNDING**

- “Alternative capital” beyond traditional grants
- "Startup funding" for new businesses
- "Modest subsidies" to lower the cost of entry into local food systems.
- State-level funding to replace fluctuating federal dollars

- **DISTRIBUTION**

- More routes, coordination aggregation; regional solutions; "last mile" logistics
- Collaboration on “shipping routes” to reduce costs & travel time

- **INFRASTRUCTURE & PROCESSING**

- Cold storage; large scale commercial processing; and shared commercial kitchen space
- A "statewide, user-friendly hub" for ordering and inventory tracking could be a way to streamline the entire system
- Processing needed for meat & produce
- Storage & equipment needed in schools

Statewide Barriers & Solutions

- **LAND ACCESS & PRESERVATION | LABOR SHORTAGES & WORKFORCE**
 - Collaboration is needed to address the "prohibitive cost of land" and to implement "right to farm policies" to protect agricultural valleys from rapid development
 - Can we address OTHER costs (housing, healthcare) so a higher price-point for food IS doable?
- **MARKET & GROCERY STORE ACCESS**
 - Increase production at wholesale scale
 - Implement consistent state and federal programs that support institutional purchasing and farm-to-school efforts (i.e. LFS, LFPA)
 - Link growers \leftrightarrow markets / connect different parts of the food chain
 - Implementing policy or regulations to incentivize local (i.e. in Sysco contracts, government, schools, institutions)
 - More retail and restaurant markets for local food
 - Better labeling of local in stores \rightarrow incentives/tax breaks to buy local
 - Address concentrated power (Walmart, Sysco, etc.)

Statewide Barriers & Solutions

- **POLICY & REGULATIONS**

- Confusion and inconsistent enforcement
- Retail regulations feel prohibitive for producers (i.e. wholesale & liquor license); need support to navigate institutional requirements
- Policy - pass the "Agronomics Bill" to provide tax incentives for retailers, reform "Cottage Food Laws" to allow for broader retail sales, and pursue "zoning reform" at the local level

- **MARKETING & EDUCATION**

- Implement cohesive messaging statewide about local, including from state government, to drive culture change
- Standardize nutrition education for youth & adults
- Use TikTok & reels to educate consumers on how to eat local on a budget
- Revive and expand the "Harvest of the Month" program

- **COLLABORATION** - The Summit is an opportunity to build a "strategic network" that is proactive and easily accessible to all participants!

Flathead Valley Survey Results

Barriers (Theme: Competition & New Threats)

- Price competition from broadliners - producers struggle to match price points & efficiency of companies like Sysco
- Labeling - Frustration over "improperly labeled imports" and grocery stores whose definition of "local" includes out-of-state produce from WA or ID
- Resource Competition - A unique barrier identified in this region is the rise of AI data centers, which are viewed as a threat to individual water rights and electricity rates.
- More processing + storage infrastructure needed
- Better coordination between producers <> buyers
- Pricing & affordability barriers exist

Flathead Valley Survey Results

Solutions

- Currently going well:
 - DTC sales & marketing - strong enthusiasm for local food, farmers markets, CSAs
 - Seeing more local producers in larger grocery stores - i.e. Super 1
 - Existing aggregators & distributors - WMGC, MFBN, Farmers' Stand, Wicked Good, Rancher's Daughter
 - Rising network of collaborators - food hubs, MFU, MMFEC/FADCs, Abundant Montana, Harvest of the Month, Food Rx
 - Consumer education & awareness - Abundant Montana, K-12 Farm to School
- New ideas / Successes that could be replicated:
 - Support retail & institutional purchasing of Montana food
 - Change the Liquor Law (primary barrier for restaurants to buy MT-grown food)
 - Protection from industrial encroachment (large corporate food & AI data centers)
 - Brainstorm solutions to address the higher cost of local food (How to compete with Sysco/US Foods/out-of-state imports?)
 - Targeted support for rural & peri-urban communities to source locally, esp distribution
 - More meat processing plants
 - More cold storage
 - Standardized marketing/message of local/Montana-grown food; campaigns

- **Does the data that we have collected so far resonate with your experience? Are there pieces of the story missing?**
- **Which of these solutions are already working here?**
- **Which of these solutions would you be most eager to try?**
- **Which solutions are the most feasible and will have the biggest impact for your community?**

JOIN THE MOVEMENT

Take the 33x33 Pledge today and join
Abundant Montana's Local Food Club!



forms.gle/bs8dc5pxbgVjtaho7

CHEESE! Let's take a group photo!



3RD GOVERNOR'S SUMMIT On Local Food & Agriculture

— **Montana 2026** —

Maximizing Montana's Agriculture Opportunity

October 23-24, 2026 | Helena

Inviting sponsors! Invest in the Summit's success today.

growmt.org/summit-sponsorship

Statewide Barriers

(Font size corresponds to the number of times it was mentioned in survey answers.)

DISTRIBUTION

PROCESSING FACILITIES

HIGH LAND COSTS

Funding & Grants | Labor Shortages | Regulations

Grocery Store Access | Sysco/Big Box Competition | Inflation

Scaling Up | Meat Inspection | Aggregation | Transportation | School Budgets |

Workforce Housing | Aging Producers | AI Data Centers | Liquor Licensing

Statewide Solutions

(Font size corresponds to the number of times it was mentioned in survey answers.)

FUNDING

DISTRIBUTION

PROCESSING

Infrastructure | Land Access | Policy

Farm to School | Marketing | Wholesale | Cold Storage

Collaboration | Legislation | Coordination | Education | Consumer Outreach |

Landfill Diversion | Red Tape | AI Data Center Threats | Strategic Network

Billings Survey Results

Barriers (Theme: Distance and Habits)

- Distribution & logistical dead-ends - i.e. Products are rarely delivered past Billings, requiring businesses to spend more on labor & gas to pick up items themselves
- Commodity culture
 - Difficult to compete with large-scale retailers on price
 - Limited shelf space for local food (marketing/visibility)
 - Entrenched commodity markets make it difficult for producers to shift toward feeding local residents vs. exporting
- Far away from processing/manufacturing/shipping resources
- Clear labeling would be helpful (MCOOL/USDA)
- Need for stable funding & institutional commitment/policies to “codify” local food as a priority
- Marketing efforts and DTC access of local food still concentrated in urban areas (less rural, Tribal)

Data from Southeast Region

Billings Survey Results

Solutions

- Currently going well:
 - Individual ranchers/producers promoting their products
 - Farmers markets
 - Grant support - Local Food for Schools, GTA
 - Systemic support - Hopa Mountain, Abundant Montana
- New ideas:
 - Implement creative ideas to combat geographic isolation
 - Policies so [X]% of institutional food purchasing is from Montana (schools, etc.)

Data from Southeast Region

Bozeman Survey Results

Barriers (Themes: Rapid Growth & High Costs)

- The prohibitive cost of land and a lack of affordable workforce housing are major roadblocks for beginning farmers and the labor they need to hire
- Frustration over “confusing food safety regulations” and a lack of a “process authority” in the state for specialized food manufacturing
- Markets
 - Concern regarding concentrated market power, where large grocery chains have corporate rules that restrict them from buying locally
 - Need better coordination between producers & buyers
 - Competition from large retailers
 - Need for more market development + local supply chain capacity
- Need more processing and storage infrastructure, including cold storage
- Distribution - i.e. shipping lines other than WMGC
- State and federal rules around meat inspection need to be revised to become more rancher-friendly

Data from Southwest & South Central Regions

Bozeman Survey Results

Solutions

- Currently going well:
 - Consumer education/demand building, storytelling - Abundant Montana, Edible Bozeman, Made in Montana label
 - DTC sales and marketing, especially farmers markets
 - Nutrition incentive programs - Double SNAP Dollars, WIC, SFMNP
 - Food hubs & growth of distribution channels - WMGC, QFD
 - MT Dept of Ag's grants
 - Co-op development - i.e. WMGC, Glacier Processing, Triple Divide Seeds
 - Resources - Farm Connect Beginning Farmer/Rancher, MT Manufacturing Extension, FADCs
- New ideas / Successes that could be replicated:
 - Institutional purchasing and Farm to School programs are expanding (Bozeman Co-op a model)
 - Regulations
 - Identify and implement solutions to regulatory hurdles for entrepreneurs
 - Modifications to wholesale licenses to make it easier to sell at retail stores for small producers
 - Implement structural tax incentives for buying Montana food
 - Explore waste management opportunities
 - A standardized "Eat Local" campaign, including from State of MT government
 - Cost of local food – Can we address OTHER costs (housing, healthcare) so a higher price-point for food is doable?
 - Consistent funding for local food programs (i.e. Local Food for Schools)
 - Year-round & winter markets - O'Hara Commons, Fat Toads Farm Pantry, Winter Kissed, SweetRoot
 - Restaurants - expecting and embracing ordering complexity

Data from Southwest & South Central Regions

Glendive Survey Results

Barriers

- Distribution & logistical dead-ends - i.e. Products are rarely delivered past Billings, requiring businesses to spend more on labor & gas to pick up items themselves
- Far away from processing/manufacturing/shipping resources
- Commodity culture & competition
 - Difficult to compete with large-scale retailers on price
 - Limited shelf space for local food (marketing/visibility); clear labeling would be helpful (MCOOL/USDA)
 - Entrenched commodity markets make it difficult for producers to shift toward feeding local residents vs. exporting
 - Challenges with local food supply consistency
- Need for stable funding & institutional commitment/policies to “codify” local food as a priority
- Marketing efforts and DTC access of local food still concentrated in urban areas (less rural, Tribal)
- Maybe a cultural barrier in schools, where "school cooks' preference for precooked meals" limits the use of fresh, local ingredients

Data from Northeast & Southeast Regions

Glendive Survey Results

Solutions

- Currently going well:
 - Individual ranchers/producers promoting their products
 - Education and awareness campaigns, including 33x33
 - Farmers markets
 - Grants & support for regional processing and food hub development
 - Systemic support - Hopa Mountain, Abundant Montana
- New ideas:
 - Implement creative ideas to combat geographic isolation
 - Policies so [X]% of institutional food purchasing is from Montana (schools, etc.)
 - Add more processing infrastructure, esp for meat (ideally USDA)
 - Add more distribution
 - Increasing local production
 - Pass COOL
 - Events to connect local producers & buyers

Data from Northeast & Southeast Regions

Great Falls Survey Results

Barriers

- More local processing infrastructure needed - lack of capacity for dehulling and malting grains or processing pulse crops at scale
- Stronger distribution systems needed
- Support for local production
- Social barriers and an aging producer population / succession planning
 - One respondent highlighted a generational issue: "aging ranchers being too stubborn" to hand over operations to the younger generation.
- Pricing & affordability barriers exist
- Market access limitations exist

Data from North Central Region

Great Falls Survey Results

Solutions

- Currently going well:
 - DTC sales & support - farmers markets, Cottage Food Laws, Abundant Montana, FADCs
 - Marketing and development of local food markets - i.e. education for consumers, local processors, local producers, retail signage
 - Food hubs and cooperative development
 - Farm to School efforts - SCALES grant, Buffalo to School Program, Tribal Food Sovereignty Programs, Big Sandy, Rocky Boy
- New ideas / Successes that could be replicated:
 - Require food at events you host to be Montana-sourced → and provide venue with a list of Montana producers to source from
 - Montana-friendly institutional RFP language and state purchasing commitments
 - On-farm processing of grain and pulse crops
 - Brainstorm solutions to address costs of production & making CPG - economic, logistical
 - Unified statewide marketing and labeling campaign for Montana foods
 - Transportation investment for rural regions
 - Investment for processing and marketing / Identifying new financing partners

Data from North Central Region

Helena Survey Results

Barriers

- More processing + storage infrastructure needed
- Frustration over “confusing food safety regulations” and a lack of a “process authority” in the state for specialized food manufacturing
- Markets
 - A barrier cited is the tie between gambling and liquor licensure, which creates an "unregulated cost" for hospitality businesses and prevents new, innovative players from entering the market
 - Price competition from broadliners - producers struggle to match price points & efficiency of companies like Sysco
 - Concern regarding concentrated market power, where large grocery chains have corporate rules that restrict them from buying locally
 - Need better coordination between producers & buyers
 - Need for more market development + local supply chain capacity
- Pricing & affordability barriers exist
- Consumer awareness
- Need support for local production

Data from Northwest, North Central, and South Central Region

Helena Survey Results

Solutions

- Currently going well:
 - DTC sales & marketing - farmers markets, Cottage Food Laws, Abundant Montana, FADCs
 - Market development markets - processors, producers, associations (Berry Growers, Beef Council)
 - More food hubs and cooperative development
 - Farm & Beef to School efforts that are community-specific - SCALES grant, Buffalo to School, Tribal Food Sovereignty Programs, Big Sandy, Rocky Boy
 - Funding resources - MT Dept of Ag grants (GTA, etc.), TOPP
- New ideas / Successes that could be replicated:
 - Unified statewide marketing and labeling campaign for Montana foods
 - Protection from industrial encroachment (large corporate food & AI data centers)
 - Policies so [X]% of food purchasing is from Montana - for events, institutions, state
 - Implement structural tax incentives for buying Montana food
 - Processing - (1) On-farm processing of grain and pulse crops, (2) more small scale meat processing
 - Brainstorm solutions to address costs of production & making CPG
 - Transportation investment for rural regions
 - Investment for processing and marketing / Identifying new financing partners
 - Evaluate & revise current regulations or Montana food laws to primarily benefit Montana producers

Data from Northwest, North Central, and South Central Region

Lewistown Survey Results

Barriers

- There is a perceived barrier in consumer awareness; for example, many consumers only associate Montana fruit with cherries, making it hard for growers of "non-traditional" fruits to find a market.
- Marketing efforts and DTC access of local food still concentrated in urban areas (less rural, Tribal)
- Consumer pushback on higher cost of local food
- High cost of production means very small margins for producers, limiting their investment into 3rd party distributors, other growth
- Competition with big box stores / limited Montana food on retail shelves
- More resources for distribution & delivery, beyond western MT
- Cold storage
- The tie between gambling and liquor licensure creates an "unregulated cost" for hospitality businesses and prevents new, innovative players from entering the market

Data from South Central Region

Lewistown Survey Results

Solutions

- Currently going well:
 - DTC sales - farmers markets (summer & winter), farm stands
 - Marketing - “Made in Montana,” Abundant Montana, associations (MT Berry Growers, MT Beef Council)
 - More aggregators, food hubs
 - Beef to School programs that are community-specific
 - Great products being grown/raised/made in Montana!
 - Funding resources - MT Dept of Ag grants (GTA, etc.), TOPP
- New ideas / Successes that could be replicated:
 - More marketing & consumer awareness about benefits of choosing Montana food
 - Implement structural tax incentives for buying Montana food
 - Explore waste management opportunities
 - More small scale meat processing options, including on-farm/ranch
 - What are ways to build networks with other food system sectors or stakeholders?
 - Policies so [X]% of institutional food purchasing is from Montana
 - Evaluate & revise current regulations or Montana food laws to primarily benefit Montana producers

Data from South Central Region

Missoula Survey Results

Barriers (Theme: Rapid Growth & High Costs)

- The prohibitive cost of land and a lack of affordable workforce housing are major roadblocks for beginning farmers and the labor they need to hire
- Frustration over “confusing food safety regulations” and a lack of a “process authority” in the state for specialized food manufacturing
- Concern over concentrated market power, esp grocery stores’ corporate rules that restrict them from buying locally
- Need more processing infrastructure
- Competition from large retailers
- Market access and distribution capacity gaps exist

Data from Southwest Region

Missoula Survey Results

Solutions

- Currently going well:
 - Consumer education/demand building, storytelling - Abundant Montana, Edible Bozeman, Made in Montana label
 - DTC sales and marketing, especially farmers markets
 - Nutrition incentive programs - Double SNAP Dollars, WIC, SFMNP
 - Food hubs & growth of distribution channels - WMGC, QFD
 - MT Dept of Ag's grants
 - Co-op development - i.e. WMGC, Glacier Processing, Triple Divide Seeds
 - Resources - Farm Connect Beginning Farmer/Rancher, MT Manufacturing Extension, FADCs
- New ideas / Successes that could be replicated:
 - Institutional purchasing and Farm to School programs are expanding (Bozeman Co-op a model)
 - Regulations
 - Identify and implement solutions to regulatory hurdles for entrepreneurs
 - Modifications to wholesale licenses to make it easier to sell at retail stores for small producers
 - Implement structural tax incentives for buying Montana food
 - Explore waste management opportunities
 - A standardized "Eat Local" campaign, including from State of MT government
 - Cost of local food – Can we address OTHER costs (housing, healthcare) so a higher price-point for food is doable?
 - Consistent funding for local food programs (i.e. Local Food for Schools)
 - Year-round & winter markets - O'Hara Commons, Fat Toads Farm Pantry, Winter Kissed, SweetRoot
 - Restaurants - expecting and embracing ordering complexity

Data from Southwest Region

Wolf Point Survey Results

Barriers

- Distribution and food access barriers related to distance / geography
- Processing capacity and infrastructure gaps
- Commodity culture & markets
 - Entrenched commodity markets make it difficult for producers to shift toward feeding local residents rather than exporting raw goods
 - Challenges scaling
 - Challenges with local food supply consistency
- Marketing efforts and DTC access of local food still concentrated in urban areas (less rural, Tribal)
- Maybe a cultural barrier in schools, where "school cooks' preference for precooked meals" limits the use of fresh, local ingredients

Data from Northeast Region

Wolf Point Survey Results

Solutions

- Currently going well:
 - Individual ranchers/producers promoting their products
 - Education and awareness campaigns, including 33x33
 - Grants & support for regional processing and food hub development
- New ideas:
 - Implement creative ideas to combat geographic isolation
 - Policies so [X]% of institutional food purchasing is from Montana (schools, etc.)
 - Add more processing infrastructure, esp for meat (ideally USDA)
 - Add more distribution
 - Increasing local production
 - Pass COOL
 - Events to connect local producers & buyers

Data from Northeast Region

ONE LAST REQUEST!

Please take this survey to update the
“3%” number by the Summit.



surveymonkey.com/r/SG25LZV