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Homegraze.

FARM TO FAMILY

Split a whole local animal with your neighbors. No shipping. No markup. No chest freezer required.

ATERNA LLC
Denver, Colorado
homegraze.com

What if you could buy meat directly from a farm with the same friction as a group dinner order?

Buying direct from a local farm is better and cheaper.
Two frictions stop most people.

FRICTION 01

Volume.

A quarter cow is more than one hundred pounds of frozen meat. That is a chest freezer, a budget commitment, and more than most households can use before quality drops. So they keep shopping at the grocery store, which sources from somewhere they cannot verify.

FRICTION 02

Trust and logistics.

If a buyer wants to try a local farm, they have to find one, vet it, send a deposit, coordinate a pickup, and trust the farmer will deliver in months. The trust gap and the logistics overhead kill the deal long before any meat is hung.

National DTC subscription boxes (ButcherBox, Crowd Cow, Moink) work around these by shipping marked-up curated portions across the country, which keeps the cold-chain cost and the markup. Local farm software (Barn2Door, GrazeCart, Local Line) makes each farm a better island. Neither aggregates a neighborhood's demand into a funded community pool.

The hyper-local group-buying marketplace for farm-direct meat.

A neighbor forms a pool to split a verified local farm's whole animal. Neighbors fund the pool transparently through an internal credit ledger. The pool funds before the farm commits. The farm processes and the pool members pick up locally at a coordinated event, with a QR code. No shipping. No chest freezer. No whole-cow commitment from any single household. Available on web at homegraze.com and on mobile.

Three things just opened the window.

MARKET

DTC meat is exploding.

The direct-to-consumer meat market grew from approximately $5.9 billion in 2024, projected to reach about $18 billion by 2033, a roughly 14.8 percent CAGR. Consumer demand for traceable, ethically sourced, regeneratively raised local protein is now mainstream, not fringe.

WHITESPACE

Crowd Cow vacated the local pool.

Crowd Cow validated the cow-pooling idea in 2015, then pivoted to a shipped national curated marketplace and abandoned the pooling mechanic. The community local-pickup niche they proved and then left is exactly what HomeGraze is reviving, done right this time.

COLD CHAIN

Local pickup avoids the tax.

National shipped DTC players carry a structural cold-chain shipping cost that compounds with every box. Local pickup eliminates it entirely. That is a real, durable cost advantage that pricing alone cannot offset.

Four steps from neighborhood to dinner.

01

A captain forms a pool.

An organizer in a neighborhood, gym, church, or friend group picks a verified local farm and a share size, then invites neighbors.

→

02

Neighbors fund the pool.

Each participant funds their share through an internal credit ledger. Money sits in escrow until the pool is full. The farm sees verified demand before committing the animal.

→

03

The farm processes.

The pool funds, the credit clears, the farm processes the animal at a USDA or state-inspected facility under the documented legal structure for the launch state.

→

04

Pickup, locally.

Pool members pick up at a coordinated local event with a QR-scanned redemption. No shipping. No chest freezer at any household.

A community ritual ("the Table") wraps the pool: members message each other, share recipes, plan pickups. The pool becomes recurring, the captain becomes a referral engine, and the neighborhood becomes the unit of growth.

A single pool, broken down honestly.

LINE ITEM	NATIONAL SHIPPED DTC (E.G. CURATED BOX)	HOMEGRAZE POOL
Sourcing	Aggregated, anonymized, often imported	One verified local farm, named, visited
Cold-chain shipping cost	$10 to $30 per box, structural	**$0. Local pickup.**
Curated markup	$1.50 to $3.00 per pound vs farm-direct	Pass-through farm price. Platform takes a transparent service fee.
Volume commitment per household	Subscription box, 5 to 10 pounds / month	Pool share, sized to fit a normal freezer (10 to 30 pounds)
Who you know	The brand, not the farmer	The farmer, by name. And the neighbors at pickup.

Source: 2024-2026 DTC meat-market analyses, ButcherBox / Crowd Cow / Moink pricing breakdowns, and farm-direct case studies. The cold-chain cost alone is the structural edge.

"Crowd Cow validated
that people will pool
to buy a cow.

Then they abandoned it
to ship marked-up boxes.

We are reviving the idea
they proved and left,
done local."

The whitespace is documented. The proof exists. The execution is ours.

Transparent platform fee. Never a markup on the meat.

FARM SIDE

Subscription

$149/mo

Farms pay for filled demand they did not have to market for. Comparable to Barn2Door's $99-$299 range. The farm keeps every cent of the meat price the buyer pays.

BUYER SIDE

Pool service fee

3% of pool

Disclosed up front in the pool ledger. Covers escrow, dispute resolution, captain tools, and the pickup-event coordination. Transparent. Not a markup.

PREMIUM

Captain Pro + Farm Plus

$19/mo each

Recurring pools, analytics, priority placement, multi-pool dashboards. The Pro tier for the captains and farms running the most volume.

The brand line is direct: HomeGraze is a platform fee, not a markup on the meat. The internal pool credit ledger is non-transferable and purchase-locked. It exists to give buyers a transparent view of what they have funded, not as a token or stored value.

A single funded pool is the unit. Marketplace economics, compounding regionally.

SCENARIO	POOL SIZE (LB)	POOL DOLLAR VOLUME	HOMEGRAZE REVENUE PER POOL	FARMS / MONTH	FARM-SIDE RECURRING
Small (quarter cow)	**~150 lb**	**~$1,200**	**~$36 (3% buyer fee)**	**1**	**$149**
Medium (half cow)	**~300 lb**	**~$2,400**	**~$72**	**1**	**$149**
Large (whole cow, 4 families)	**~600 lb**	**~$4,800**	**~$144**	**1**	**$149**
Region (100 pools / mo, 20 farms)	**~30K lb**	**~$240K GMV**	**~$7,200 pool fees**	**20**	**$2,980 farm SaaS**

A single launch region at scale produces roughly $10K combined monthly revenue plus $240K GMV passed through to farms transparently. Three regions equals approximately $120K ARR plus $8.6M annualized GMV pass-through. The unit is the pool. The growth lever is the region.

Two markets. Neither owns the neighbor pool.

A growing market, a vacated niche.

$5.9B	$18B	14.8%	2015
DTC MEAT MARKET, 2024	PROJECTED, 2033	DTC MEAT CAGR	YEAR CROWD COW FIRST POOLED A COW

The DTC meat market is large and growing fast. The farm-direct software market (Barn2Door, GrazeCart, Local Line, $99 to $399 per month) proves farms will pay to sell direct. Crowd Cow proved consumers will pool to buy an animal. Nobody is doing community demand aggregation with local pickup. That is the open niche.

Sources: 2024-2026 DTC meat market analyses, farm-direct software pricing pages, Crowd Cow's pivot history. References slide in the appendix.

Two fronts. Neither aggregates local demand.

PLAYER	WHAT THEY DO	WHERE HOMEGRAZE WINS
Barn2Door	Single-farm SaaS storefront, $99-$299/mo, the category leader on supply side	Aggregates demand across farms, ships nothing, brings a buyer community to the farm
GrazeCart (close namesake)	Single-farm meat SaaS with catch-weight pricing. Acquired by PE in 2023, thinly staffed since.	Multi-farm demand aggregation, modern stack, growing team. Namesake flag noted.
Local Line	Multi-channel farm sales with wholesale and food-hub features	Consumer community pool model, not wholesale buyer network
ButcherBox	Retention leader in shipped DTC, grass-fed national subscription	Local farm, local pickup, no cold-chain cost, no markup
Crowd Cow	Originated the cow-pool idea, pivoted to shipped curated marketplace	Local first, community first, doing the original idea right
Moink, Porter Road, Good Chop	Subscription specialty shipped meat	Same local-vs-shipped story. No pooling. No community.
Market Wagon	Online local-food delivery aggregator	Community group buy splitting a whole animal,

The moat is the network, not the code. Three compounding edges. Honest about each.

01 / LOCAL LIQUIDITY

Density compounds region by region.

Once a metro has enough verified farms and enough active pools, it becomes the obvious place for both sides to be. That density is hard to replicate and self-reinforces. Protect it by going deep in one region before going wide. This is the real moat.

02 / COMMUNITY LOCK-IN

The captain is the retention engine.

Each pool is a community ritual ("the Table"). A captain who rallies neighbors every season is a customer-acquisition and retention loop a national storefront cannot copy. Invites are the lowest-cost channel and they are built into the product.

03 / TRUST AND THE CREDIT LEDGER

Funded escrow before the farm commits.

THE HONEST FRAMING

Marketplace, not deep-tech.

Pre-launch. Product built. Waitlist open. Launch region selected.

Shipping today: the consumer web at homegraze.com, the Expo mobile app, the NestJS plus Prisma plus PostgreSQL API with the farm side (verification, products, allocations) and the consumer side (pools, the Table community chat, pickup, QR redemption). Stripe payments. An internal credit ledger that tracks funds transparently through the pool lifecycle. A waitlist module collecting initial demand by region.

In the use of funds: the launch-region GTM motion (verified farms, lighthouse contracts, captain recruitment), the regulatory and legal model for meat-share sales in the launch state, cold-chain pickup-event logistics, and the captain referral loop instrumented end to end.

Regulatory note: meat sales are state-regulated. The legal structure for whole-animal share sales is a first-class workstream, not an afterthought, with a documented launch-state strategy and processor partnerships ready for diligence.

Atanasio Juarez
Founder, ATERNA LLC

Atanasio is a multi-product builder running ATERNA, a venture studio shipping production AI and consumer products across vertical markets. HomeGraze sits inside ATERNA Labs alongside MEMY (voice agent), ROUTEXOR (LLM routing infra), and Melk (restaurant POS). The portfolio shares engineering standards, design language, and an infrastructure backbone.

WHY THIS TEAM FOR THIS MARKET

Marketplaces are won by execution and patience, not novelty. ATERNA ships durable consumer products and operates a multi-product studio with the discipline a region-by-region launch needs. Engineering, product, brand, and operations all run from one house.

HONEST ABOUT WHAT WE ARE NOT

We are not lifelong meat-industry operators. We are recruiting an advisor or part-time GM with deep farm and processor relationships in the launch region. That hire is line-itemed in the use of funds, and the conversation is already underway.

Liquidity-first. One region. Captains plus lighthouse farms.

CHANNEL	ALLOCATION	WHY
Lighthouse farm contracts in the launch region	**25%**	A farm that sells out through HomeGraze tells other farms. Supply side comes first.
Captain recruitment program (incentives, training)	**30%**	Captains are the demand-side growth loop. Each one becomes 5 to 15 households.
Pool launch events and pickup-day experience	**15%**	Make pickup day feel like a farmer's market with neighbors. That ritual is the retention.
Story-led local PR and content (operator-to-operator)	**15%**	Local food press, farmer-led testimonials, captain stories. Trust beats ads in this space.
Targeted paid (neighborhood-scoped, captain-focused creative)	**10%**	Once the loop is instrumented, paid amplifies it. Not before.
Brand and SEO collision-clearing work	**5%**	GrazeCart, "Homegrown," Crowd Cow live nearby. The launch-region brand needs to land clean.

Where the $1,500,000 goes. Twelve months. One region. Captains and farms.

Founder runway (18 months, modest draw)	$120,000
Engineering hire (mobile + full-stack, 12 months loaded)	$200,000
Regional GM and community lead (12 months loaded)	$180,000
Lighthouse farm contracts and onboarding	$150,000
Captain incentives and acquisition	$150,000
Regulatory and legal (meat-share structure, state-by-state)	$120,000
Marketing (story-led content, local PR, captain-focused creative)	$120,000
Cold-chain logistics for pickup events	$100,000
Infrastructure scaling (Postgres, payments, observability)	$80,000
Insurance, accounting, brand collision clearance	$80,000

$1,500,000. Pre-seed.
$6M pre-money. Standard SAFE or priced.

ROUND SHAPE

$1.5M

Pre-seed round, priced at $6M pre-money. Equates to approximately 20 percent post-money equity. Standard pre-seed terms. Single lead at $500K to $1M plus a syndicate. Pro rata rights for the lead. No board seat at this round size.

WHY THIS SIZE

1 region

Funds the launch region completely: lighthouse farms, captain recruitment, regulatory and legal, pickup logistics, two named hires, brand work. Target: 100 funded pools and roughly $1M GMV in the launch region by month 12. That is the liquidity proof a seed round wants to see.

Standard pre-seed terms. SAFE or priced equity. We will syndicate, but a single aligned lead writing $500K plus is operationally easier.

Four things, in order.

01 / KNOWS MARKETPLACES

Has funded local marketplaces, community-commerce, or two-sided network businesses before. Understands liquidity-first launches and is comfortable with a region-by-region motion, not a national blitz.

02 / NETWORK IN FOOD OR AGRICULTURE

Connections to local-farm networks, ag advocacy, regenerative-meat operators, or food-policy circles. The first 20 farms come from warm introductions, not cold pitch.

03 / PATIENT ON THE REGIONAL MOTION

Comfortable with one metro getting visibly dense in year one rather than a thin national footprint. Marketplaces with thin coverage everywhere die. Our defense is depth in one region first.

04 / WILLING TO WRITE THE LEAD CHECK

Strong preference for a $500K to $1M lead check. We will syndicate the remainder. One aligned lead is operationally easier than a crowd of small checks.

Four honest failure modes, four operational defenses.

RISK	DEFENSE
Two-sided marketplace cold-start: no farms without buyers, no buyers without farms.	Liquidity-first launch. We win one region completely (verified farms + active pools + visible fill rates) before opening a second. Captains are the demand-side loop. Lighthouse farms are the supply-side proof. The use of funds is structured exactly around this.
Low technical defensibility. Anyone can build the software.	We say so. The moat is the local network, the community ritual, and the trust ledger. Marketplaces are won by execution and patience, not technical novelty. The right defense is going deep in one region before competitors notice.
Regulatory load. Meat sales are state-regulated and the share model has legal structure to get right.	Regulatory and legal is a first-class workstream and a $120K line item. Launch-state strategy and processor partnerships will be documented and ready for diligence. Internal pool credit is non-transferable and purchase-locked, deliberately framed as escrow, never as a token.
Brand collision (GrazeCart, Crowd Cow, "Homegrown").	Brand and SEO collision-clearing work is a line item. The launch-region creative differentiates the one-liner so HomeGraze is unmistakable in its market, even with nearby names in the space.

What success looks like in 12 months.

BY MONTH	MILESTONE
M3	Launch region announced publicly. 5 verified farms onboarded. 2 lighthouse farm contracts signed. Regulatory and legal model documented for the launch state.
M6	10 funded pools completed. ~$50K GMV. Captain referral loop instrumented end to end. First repeat-pool farms. Regional GM hired and shipped.
M9	25 funded pools completed. ~$200K GMV. Second farm cohort onboarding. Pool fill rate over 70 percent. First captain-driven referral chain documented.
M12	100 funded pools. ~$1M GMV. Pool fill rate over 80 percent. Second-region scoping begun. Ready to open seed round at $15M to $25M valuation step-up.

Targets are bottom-up. The unit is the funded pool. The growth lever is captain-to-captain referral inside one dense region. The marketplace proof a seed round funds is region density, not vanity totals.

03 / CLOSING

The neighbor pool was proven and left on the table.

Crowd Cow validated that people will pool to buy a whole animal. Then they walked away to ship marked-up boxes. The farm-direct software market proves farms want to sell direct but treats every farm as an island. The community local-pickup niche is open and growing inside a fourteen-percent-CAGR market. HomeGraze is built to occupy it, region by region.

Let us build this.

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Appendix materials available on request: launch-region selection and rationale, technical architecture overview, regulatory model and state-by-state legal structure, captain growth-loop economics, three-year financial model.