

AR Purpose and Description:

Research is foundational to the Beef Checkoff. Through scientific and consumer market insights/research, the outcomes of this AR inform the programs of other ARs and tactics and provide key decision-making insights for state beef councils (SBCs) and the industry at large. All research tactics address the Beef Industry Long Range Plan (LRP). In technical research areas, focused research roadmaps are established with industry experts in each discipline. Each year, project results are compared to the research roadmaps which inform future research questions and roadmap evolution. Thus, this AR is three years in length, allowing for standard research protocols and reviews by authoritative groups (for study design and methodology for human or animal subjects, necessary approvals with industry partners, and database and platform use agreements, etc.), contract initiation, project execution and reporting. Each project completion informs the research pipeline for beef in each tactic. As a result, new research is placed each year when the AR is funded, based on previous outcomes, and allows for continued progress against the roadmaps and LRP goals. For consumer insights, continuous monitoring and deep dives into consumer beliefs and behaviors guide beef demand-building programs within and outside the Beef Checkoff.

The historical impacts of this AR have been significant:

- Informed the industry and academia on the physiology of pathogens which was used to develop multiple hurdle interventions post-harvest and discovered pathogens important to human health could also be reduced pre-harvest;
- Improved consumer beef eating experience by generating benchmarks (National Beef Tenderness Survey) and recommending strategies to improve consistency while exploring innovations to merchandise beef muscles more effectively (muscle profiling, packaging evolutions);
- Improved beef's position compared to other proteins by validating its human nutritional value through scientific research (BOLD, Mediterranean diet, life stage nutrition, etc.) and market research data to reach consumers with impactful messages;
- Set an industry benchmark for sustainability through a Life Cycle Assessment (LCA) and used publicly available data to expand beef's sustainability benefits and put greenhouse gas (GHG) and other facts into perspective;

- Identified and refined the target beef audience while continuously assessing consumers' evolving beliefs and demographics to understand their retail and foodservice purchasing habits.

NCBA, as a contractor to the Beef Checkoff serves as a cooperative industry leader in beef safety, product quality, human nutrition, sustainability, and consumer market research providing insights to all Beef Checkoff programs, SBC partners and the industry to build demand now and into the future.

Through these programs, and to accomplish the stated deliverables and outcomes, traveling to/from and attending key influencer/stakeholder/partner meetings may be required. This will enable staff to gain or provide more strategic guidance and training, engage in briefings and/or educational sessions/events, and disseminate knowledge. To accomplish this, it may be necessary for the Checkoff to fund international travel to/from the U.S. AR funds may be used to communicate results to stakeholders, including producers, and to implement current and previously funded ARs. Also note that legal counsel may be sought for routine, day-to-day content development, program planning, and contracting to ensure compliance with federal rules or regulations.

CBB Budget Category: Research

Start Date: 10/1/2024

End Date: 9/30/2027

FY25 CBB/BPOC Funding Request		
Direct Costs	Implementation	Total
\$5,076,000.00	\$2,924,000.00	\$8,000,000.00

Beef Industry Long Range Plan (LRP) Core Strategies Addressed by this AR:

- Grow Consumer Trust in Beef Production
- Develop and Implement Better Business Models to Improve Price Discovery and Value Distribution Across all Segments
- Promote and Capitalize on the Multiple Advantages of Beef
- Improve the Business and Political Climate of Beef
- Safeguard and Cultivate Investment in Beef Industry Research, Marketing and Innovation

TACTIC DESCRIPTION:

NCBA, on behalf of the Beef Checkoff, leads the scientific research on improving beef safety in the segment where beef is raised, pre-harvest, and shares the insights gained across the industry and stakeholder community through scientific affairs. Research outcomes provide the pre-harvest beef production sector with evidence to evolve how cattle are raised to reduce the likelihood of cattle bringing chemical, physical, or biological hazards into the post-harvest production environment. Additionally, this research shows the dedication of producers to the broader community focused on improving the safety of beef. This is also the program that brings the industry together annually to hear food safety-related research and to tackle the industry's safety challenges at the Beef Industry Safety Summit. Building on the track record of tackling food safety issues and making scientifically valid recommendations for reducing *E. coli* O157 and the other shiga-toxin-producing *E. coli* (STECs) and *Salmonella* in the gastrointestinal tract, BSE and specified risk material, and recommendations for many of the post-harvest interventions utilized across the industry, this tactic has brought industry leaders together, commissioned key research and disseminated outcomes to stakeholders making daily beef safety decisions in the industry, to the regulatory environment and consumers.

This tactic targets the scientific community including established and emerging scientists recognized in their field of expertise, scientific organizations (American Meat Science Association, International Association for Food Protection, etc.), beef safety decision-makers throughout the industry (feedlot operators, packers, processors, retail, foodservice, corporate food safety scientist) and regulatory sectors.

In FY25, this program will invest in pre-harvest beef safety research that evaluates biological (pathogen) contamination/interventions/management strategies considering new regulatory requirements; physical contamination detection ante-mortem; and methodology advancements and contamination routes for detecting *Salmonella* as a leading cause of foodborne illness. Additionally, technical assessments/reviews will be commissioned to identify research gaps and/or to summarize existing research in the public domain to serve as an industry and scientific resource on a pre-harvest safety topic to reduce duplication of funding by entities (USDA, the beef industry, other Checkoff programs, private organizations, etc.). Scientific affairs programs will bring attention to beef safety research outcomes through engagement with advisory groups, industry and regulatory thought leaders at briefings, research summits, conferences, and written and visual tools (infographics). Through collaborations with state beef councils (SBCs), other NCBA Checkoff programs, other Checkoff contractors (e.g., USMEF, AFBFA FMPRE, etc.), as well as other science-based organizations, universities, and institutions, program results will be shared widely through publications, scientific conferences,

and deep-dive immersion experiences for broader impact. Strategic planning sessions will be conducted as needed to identify research gaps and collaborative research opportunities with third-party experts. This tactic directly addresses the demand drivers of eating experience and how beef is raised and grown.

Measurable Objectives:

Measurable Objective #1

Fund Research Projects: Conduct a minimum of three (3) original pre-harvest safety scientific research projects or technical assessments focused on biological contamination, interventions, and/or management strategies considering new regulatory requirements, physical contamination detection ante-mortem, and/or methodology advancements and contamination routes for detecting *Salmonella*.

Measurable Objective #2

Build Research Acceptance: To build broader scientific understanding in beef safety, conduct science briefings with targeted safety thought leaders on new beef research and key topics such as beef's safety evolution and progress, pathogen reduction methods and beef's role in a OneHealth approach (minimum of 35). Reach at least five (5) new thought leaders (ex. emerging investigators) to expand the quantity and quality of scientists with interest in conducting and communicating beef research.

Measurable Objective #3

Place Research Results: Increase the visibility of pre-harvest beef safety findings by securing placement of research results (minimum of 20) internally (in other tactics/ARs or SBC partners) or externally (conferences, industry meetings, supply chain partners, communication/educational outlets, etc.) to improve the understanding of beef safety and research advancements.

Performance Efficiency Measures:

N/A on Research ARs

LRP Initiatives Addressed by this Tactic:

Improve the Business and Political Climate of Beef

- Drive continuous improvement in food safety

Safeguard and Cultivate Investment in Beef Industry Research, Marketing and Innovation

- Encourage the cooperation and collaboration of existing industry advisory committees to identify and prioritize research efforts

Checkoff Program Committee(s): Safety & Product Innovation

TACTIC DESCRIPTION:

NCBA, on behalf of the Beef Checkoff, leads scientific research on beef's role in human health and conducts scientific affairs to build research acceptance within the nutrition science community. Research outcomes present opportunities for marketing and communications opportunities and are the foundation for educating and motivating health professionals to recommend beef. This is also the program responsible for providing scientific evidence about beef's role in health to authoritative bodies like the *Dietary Guidelines for Americans* and other leading health organizations that guide the public on what and how to eat. As the only beef-centric US-based beef nutrition research initiative, this program uniquely promotes, protects, and defends beef's role in the diet by providing scientific evidence and developing beef expertise among nutrition scientists. This program has generated compelling reasons to choose beef as a food for health (i.e., muscle health, weight loss, optimal infant and childhood growth and development, heart health, diabetes and healthy aging) which has helped build beef demand by strengthening beef's positive health perceptions with scientists, nutrition, health and medical experts, and consumers.

This tactic reaches established and emerging nutrition scientists who are recognized for their academic or clinical achievements. They are members of academia, government, health organizations, scientific associations (including the American Society for Nutrition and Institute for the Advancement of Food and Nutrition Sciences), and industry (corporate scientists in food and/or health and wellness companies involved in product development). Their significant influence and credibility in their field of expertise establishes them as thought leaders of future research agendas or national nutrition recommendations.

In FY25, this program will invest in nutrition research projects that 1) evaluate the types and amounts of beef in emerging and/or popular eating patterns and its impact on metabolic health (heart health, diabetes, weight) and 2) evaluate the role of beef's unique matrix to support physical and cognitive health at key life stages (periods of growth and development and/or aging). In addition to original human research trials, technical assessments will also be commissioned to publish the finding in the public domain. Scientific affairs activities will be used to bring attention to beef nutrition research discoveries and include briefings, research summits, conferences, written materials and visual tools (infographics). Through collaborations with state beef councils (SBCs), other NCBA Checkoff programs, other Checkoff contractors (e.g., NEBPI, AFBFA, FMPRE, etc.), as well as research-based universities and institutions, program results will be shared widely through publications, scientific conferences and deep-dive immersion experiences for broader impact. Strategic planning sessions will be conducted as needed to

identify research gaps and collaborative research opportunities with third-party experts. This tactic directly addresses the demand drivers of nutrition that influence preference and consumption.

Measurable Objectives:

Measurable Objective #1

Fund Research Projects: Conduct a minimum of five (5) original nutrition scientific research projects or technical assessments focused on types and amounts of beef in emerging/popular eating patterns for heart health, diabetes and weight management and/or beef's unique matrix on physical and/or cognitive health during growth and/or development or aging.

Measurable Objective #2

Build Research Acceptance: To build broader scientific support for beef's role in healthy diets, conduct briefings with targeted nutrition scientists on new beef research and key topics such as beef's protein quality advantage, sustainable nutrition, nutrient density and improved scientific methods assessing beef (minimum of 35). Reach at least five (5) new thought leaders (e.g., emerging investigators) to expand the quantity and quality of scientists with interest in conducting and communicating research on beef.

Measurable Objective #3

Place Research Results: Increase the visibility of nutrition research findings by securing placement of research results (minimum of 60) internally (in other tactics/ARs or SBC partners) or externally (conferences, industry meetings, supply chain partners, communications/educational outlets, etc.) to improve understanding of the positive impact of beef on human health.

Performance Efficiency Measures:

N/A on Research ARs

LRP Initiatives Addressed by this Tactic:

Grow Consumer Trust in Beef Production

- Educate medical, diet and health professionals about beef and beef production

Promote and Capitalize on the Multiple Advantages of Beef

- Promote the role of beef in a healthy and sustainable diet

Improve the Business and Political Climate of Beef

- Ensure beef's inclusion in dietary recommendations

Safeguard and Cultivate Investment in Beef Industry Research, Marketing and Innovation

- Encourage the cooperation and collaboration of existing industry advisory committees to identify and prioritize research efforts

Checkoff Program Committee(s): Nutrition & Health

Tactic C | 2511-R
Product Quality Research and Technical Expertise

TACTIC DESCRIPTION:

NCBA, on behalf of the Beef Checkoff, leads the sole tactic focused on beef product quality and extends those findings to industry stakeholders. The outcomes of this tactic build the scientific foundation and expand the opportunities to increase product consistency, utilization, and ultimately consumer satisfaction. Additionally, the findings of this tactic fill an essential industry need for disseminating product quality research findings outside of a competitive environment. This research initiative focuses on the product and ultimate consumer satisfaction through product diversity, cooking methodology and enhancing product consistency. Historically, this program has generated scientific evidence for utilizing the carcass through product management (tenderness, aging, muscle utilization/optimization/value cuts) for continuously improving consumer satisfaction. This research tactic has been essential to safeguard the foundation of eating experience and continue to provide opportunities for increasing product consistency.

This tactic engages key decision-makers and emerging leaders who are responsible for product management and scientific solutions. The audience consists of supply chain members, academia, government, and scientific associations (American Meat Science Association and International Community of Meat Scientists) focusing on the breadth of the industry from production influences on product management and ultimate end-user decisions. The expertise provided by these thought leaders delivers the opportunity to elevate them on technical agendas, symposia and outreach opportunities.

In FY25, this tactic will continue to build the scientific foundation by funding research focused on product optimization of today's carcasses population, cold chain management to reduce inconsistencies in eating experience, and opportunities to ensure product integrity for the ultimate consumer eating experience. Additionally, technical assessments/reviews will be commissioned to identify research gaps and/or to summarize existing research in the public domain to serve as an industry and scientific resource on a product quality topic to reduce duplication of funding by entities (USDA, Beef, and other Checkoff programs, private organizations, etc.). Key results are activated through technical summaries, peer-reviewed manuscripts, research presentations, science briefings, and other scientific affairs strategies. Furthermore, these will be leveraged through collaborations with state beef councils (SBCs),

other NCBA Checkoff programs, other Checkoff contractors (USMEF, FMPRE, AFBFA, etc.), and scientific associations. Strategic planning sessions will be conducted as needed to identify research gaps and collaborative research opportunities with third-party experts. Taste is the top reason consumers choose beef, and this topic addresses the demand drivers of eating experience, convenience/versatility, and price.^[1]

Citations:

[1] Consumer Beef Tracker. Dec 2023

Measurable Objectives:

Measurable Objective #1

Fund Research Projects: Conduct a minimum of 8 original product quality scientific research projects or technical assessments focused on product optimization, cold chain management, product integrity, and ensuring consistency of eating experience that leads to discoveries about beef quality and strengthens the scientific foundation and/or balances the body of evidence to reinforce beef's quality attributes within the scientific community.

Measurable Objective #2

Build Research Acceptance: To build broader scientific understanding in beef quality, conduct science briefings with targeted product quality thought leaders and provide industry relevant insights around product uniformity, opportunities to overcome eating quality inconsistencies, and optimization of product quality practices across the supply chain (minimum of 30). Target at least five (5) new thought leaders (ex. emerging investigators) to expand the quantity and quality of scientists with interest in conducting and communicating research on beef.

Measurable Objective #3

Place Research Results: Increase the visibility of research findings through placement of product quality research results (minimum of 45) internally (other tactics/ARs or SBC partners) or externally (conferences, industry meetings, supply chain partners, communication/education outlets, etc.) to improve the understanding of beef quality and research advancements.

Performance Efficiency Measures:

N/A on Research ARs

LRP Initiatives Addressed by this Tactic:

Develop and Implement Better Business Models to Improve Price Discovery and Value Distribution Across all Segments

- Use innovative methods and technologies to value carcasses based on eating satisfaction and red meat yield

Promote and Capitalize on the Multiple Advantages of Beef

- Engage consumers in a memorable beef eating experience
- Promote underutilized beef cuts and new variety meat products

Safeguard and Cultivate Investment in Beef Industry Research, Marketing and Innovation

- Encourage the cooperation and collaboration of existing industry advisory committees to identify and prioritize research efforts

Checkoff Program Committee(s): Safety & Product Innovation

Tactic D | 2511-R
Sustainability Research and Scientific Affairs

TACTIC DESCRIPTION:

NCBA, on behalf of the Beef Checkoff, leads scientific research to inform and engage industry stakeholders on the comprehensive topic of beef sustainability. Previous completion of the foundational U.S. beef sustainability Life Cycle Assessment (LCA) established a baseline measurement of beef's environmental footprint and identified areas of improvement throughout the supply chain for continual advancement of sustainable beef production. The collection of region-specific data continues to reflect the geographical differences in how beef is raised sustainably. The program continues to advance its research needs to reflect the true sustainability of beef more accurately, and better inform future sustainability assessments and opportunities for further improvement. It is critical for the beef industry to better understand these complex topics to maintain consumer confidence in beef production. This work also builds the scientific foundation for beef sustainability communications, thought leader education and consumer messages. Though a complex topic for all audiences, sustainability research continues to provide clarity for audiences by identifying and benchmarking areas for improvement.

Multiple audiences are targeted with this program work, both through direct tactic influence, including the scientific community, and indirectly by providing science-based information for the supply chain (retail, foodservice, packers, feedlot, and cow/calf), and those that influence consumer opinion (food, ag and culinary thought leaders, nutrition and health professionals,

consumer media, and NGOs).

The current research roadmap, developed and maintained with an industry expert advisory group, builds a foundation of research that addresses challenges and opportunities related to beef sustainability while focusing on the environmental, economic and social pillars of sustainability. The program has evolved to identify high-priority research needs and will invest in projects for FY25 that focus on community dynamics and beef production, land use evolution, benchmarking environmental metrics such as water quality and quantity, animal welfare, resource stewardship, and unintended consequences of beef sustainability to meet consumer demands. Scientific outreach will focus on leveraging research results and content to key audiences, including technical presentations and educational tools with other tactics. Strategic planning sessions will be conducted as needed to identify research gaps and collaborative research opportunities with third-party experts. Furthermore, these efforts will be leveraged through collaborations with state beef councils (SBCs), other NCBA Checkoff programs as well as other Checkoff contractors (e.g., AFBFA, USMEF, etc.) for a broader impact. This tactic directly addresses the demand driver of how food is raised/grown.

Measurable Objectives:

Measurable Objective #1

Fund Research Projects: Conduct a minimum of four (4) original sustainability scientific research projects or technical assessments focused on animal welfare, natural resource management, the socio-economic relationship of beef production within community dynamics, and benchmarking environmental sustainability metrics such as water quality and quantity. These areas of focus lead to discoveries about beef sustainability and strengthen the scientific foundation and/or balances the body of evidence to reinforce beef's positive sustainability role within the scientific community.

Measurable Objective #2

Build Research Acceptance: To build a broader scientific understanding in beef's sustainability, conduct science briefings with targeted sustainability thought leaders on varied topics including water and resource management, socio-economic relationship between communities and beef production, and animal welfare (minimum of 25). Target at least five (5) new thought leaders (ex. emerging investigators) to expand the quantity and quality of scientists with interest in conducting and communicating research on beef.

Measurable Objective #3

Place Research Results: Increase the visibility of beef sustainability research results, (minimum of 20) internally (in other tactics/ARs or SBC partners) or externally (conferences, industry meetings, supply chain partners, communications/educational outlets, etc.) to improve the understanding of beef sustainability.

Performance Efficiency Measures:

N/A on Research ARs

LRP Initiatives Addressed by this Tactic:

Grow Consumer Trust in Beef Production

- Measure, document, improve, and communicate the net climate and environmental impact of beef production

Improve the Business and Political Climate of Beef

- Demonstrate beef's positive sustainability message and key role in regenerative agriculture

Safeguard and Cultivate Investment in Beef Industry Research, Marketing and Innovation

- Encourage the cooperation and collaboration of existing industry advisory committees to identify and prioritize research efforts

Checkoff Program Committee(s): Consumer Trust

Tactic E | 2511-R
Consumer Market Research

TACTIC DESCRIPTION:

NCBA, on behalf of the Beef Checkoff, delivers valuable insights through this tactic to enhance the effectiveness of all Checkoff programs. Through exploration of crucial subjects, message and asset testing, and utilization of diverse industry data sources, NCBA supports the development and execution of data-driven, demand-generating initiatives. These efforts inform both state-specific and broader national and industry-wide plans aimed at bolstering and safeguarding demand for beef. Program insights guide channel marketing strategies impacting retail and foodservice beef sales, test messages used to manage issues or respond to media inquiries, evaluate content that shape consumer marketing efforts, and study third-party audiences and their influence on consumers. Industry stakeholders leverage the consumer insights from this program to develop their own marketing initiatives, contributing to the overall growth of beef demand. Over time, this program has undergone a significant transformation, consolidating various tactics into a cohesive and efficient approach aimed at tracking consumer behaviors regarding beef and exploring emerging beef-related topics. Some of the topics addressed include production and nutrition perceptions, changes in consumption patterns and willingness to pay, and expanded efforts to encompass diverse aspects such as purchase intent and actual buying patterns, leveraging both traditional and technology-driven (such as eCommerce) avenues for engagement.

The dynamic nature of the target consumer audience necessitates continual adaptation. This tactic monitors demographic shifts, as well as evolving preferences and constraints influenced by generational and belief-driven factors, to better inform all Checkoff initiatives. This comprehensive data analysis extends beyond beef alone, gauging beef's competitive standing against both conventional animal proteins and alternative protein offerings.

In FY25, this tactic will enhance key knowledge about today's consumer by consistently monitoring, analyzing, and sharing insights on consumer behavior, attitudes, purchases, and perceptions through the Consumer Beef Tracker. This tracker, built upon years of valuable insights, involves surveying at least 1,000 consumers monthly, providing ample data for developing summaries to support both state and national programs. Compared to previous years, the Consumer Beef Tracker now boasts a larger sample size, enhancing analytical capabilities and accuracy, allowing for greater depth of data segmentation and cross-tabulation to better understand key consumer demographics. Additionally, the data allow for the development of comparative analyses between state and national consumer trends to inform strategic planning for SBC partner programs. By segmenting this data, valuable targeting insights are gained, which are crucial for all consumer-facing initiatives. Channel intelligence data will continue to be licensed, analyzed and disseminated such as retail checkout scanner data and foodservice operator data. Projects will be initiated to assess the effectiveness of content and the *Beef. It's What's For Dinner.* brand and digital properties. Further, deep-dive projects using qualitative focus group research with beef consumers will evaluate topics such as food waste/food loss and consumer perceptions and preferences around tradeoffs of product appearance, shelf life, and cost implications for beef and other timely demand driver-related topics. Where opportunities exist, other consumer market data and insights that may impact beef consumption and demand will be evaluated. This tactic not only directly addresses all demand drivers but also serves as the foundation from which these drivers are derived and updated.

Measurable Objectives:

Measurable Objective #1

Develop State Consumer Insight Dashboards: Conduct a minimum of 35 state and Designated Market Area (DMA) dashboard surveys for 20 unique state beef council (SBC) entities, along with subsequent follow-up presentations where appropriate, to utilize and leverage consumer insights for state partners, facilitating the development of impactful programming for state partners.

Measurable Objective #2

Fund Research: Conduct a minimum of six (6) research projects focusing on demand drivers, asset testing, or continuous consumer monitoring. These projects will guide campaign/program strategies by delivering insights into content and messaging preferences of the target audience.

Measurable Objective #3

Share Beef Insights Reports: Produce eight (8) beef insight reports aimed at comprehending consumer sentiment and knowledge levels regarding demand-driving topics. Disseminate these reports publicly through BeefItsWhatsForDinner.com and/or Beefresearch.org.

Measurable Objective #4

Place Research Results: Increase the visibility of consumer market research results or insights (minimum of 120) both internally (within other tactics/ARs or SBC partnerships) and externally (including conferences, industry meetings, supply chain collaborations, and communication/educational outlets). These placements will leverage science-based insights from this program on beef consumer perceptions, behaviors, and purchasing trends to existing and new audiences.

Performance Efficiency Measures:

N/A on Research ARs

LRP Initiatives Addressed by this Tactic:

Grow Consumer Trust in Beef Production

- Align and collaborate with traditional and nontraditional partners to tell the positive story of beef cattle production
- Educate medical, diet and health professionals about beef and beef production

Promote and Capitalize on the Multiple Advantages of Beef

- Develop targeted marketing programs focused on the highest opportunity market segments
- Engage consumers in a memorable beef eating experience
- Develop a more interactive and exciting beef purchasing experience

Checkoff Program Committee(s): Domestic Marketing

Supplemental Information for This AR

1. Please explain significant changes from the FY24 approved AR.

The tactics in this AR are foundational to other national and state Checkoff programs. Each technical research tactic will explore different research questions related to the pillars of each respective research roadmap that align with the Beef Industry Long Range Plan objectives.

2. List any proposed vendors/agencies that will be used to complete the work in this AR.

Various laboratories, universities, health science centers and their affiliated research scientists, independent research or science outreach companies, government agencies and other contractors and vendors may be used to complete research. Subcontractors will be chosen via a request for proposals process and/or through the development of targeted

research projects based on previous research expertise, budget rational, and industry need and/or research roadmap priorities.

Pure Spectrum and Qualtrics, or comparable vendors, will be utilized as the sample provider for cost-effective and efficient surveying and analysis. Work related to consumer tracking and segmentation will be conducted by Directions Research which was selected after a competitive bid process due to their deeper knowledge of consumer tracking and segmentation analysis as well as of the beef industry and competitive landscape. GlobalData will provide insights into the foodservice channel along with a suite of strategic services and proprietary databases by foundational market research to explore and act on a variety of foodservice insights. NielsenIQ and Circana provide custom systems for analyzing the value of beef sold at retail, starting with scanner data, and reassembling cuts back to beef primals, so that long-term value to producers can be tracked. Other contractors will be selected based on expertise in respective areas (e.g., nutrition, channel data analysis, focus group facilitation, etc.) and will be part of the competitive bid process where appropriate.

3. Will all work with vendors/agencies be competitively bid? If no, please provide a brief description as to why.

No. Because of the broad scope of the work in this AR, various entities will be utilized for expertise, see above.

4. Has this AR built upon past work or projects that have been previously funded by the BPOC? If yes, please provide a detailed list and background information on the project and contractor(s) involved.

The programs in this AR are built on, but do not duplicate work from previous ARs and are leveraged by other checkoff programs, key industry stakeholders and the research community.

Some of the research included in this AR is ongoing tracking research, funded for several years, and is critical to stay current on consumer trends and perceptions so programs and the broader industry can properly respond to changes as they occur.

5. If applicable, explain how this AR can be extended by state beef councils or other contractors.

Key insights from this and previous Research ARs are utilized by state beef councils (SBCs) as the foundation for programming in their state. As SBC conduct research, expertise and insights are shared as appropriate. Research results and other insights are shared on Beefresearch.org and upon request.

Detailed Budget Summary

The tables in the following three sections report program budget information from the following funding sources:

- Cattlemen's Beef Board/Beef Promotion Operating Committee (CBB/BPOC) Funding
- Other Funding sources such as:
 - Federation of State Beef Councils (FSBC) Funds
 - Individual Qualified State Beef Council (QSBC) Funds
 - Government Funds (e.g., Market Access Program, Foreign Market Development)
 - Grain/Oilseed Funds (e.g., National Corn Growers Association, American Soybean Association) Corporate Funds (e.g., tech and pharma companies)
- Other

Section 1 – FY25 Funding Requested by Tactic

FY25 CBB/BPOC Funding Requested by Tactic

The following table outlines the amount of CBB/BPOC funding that is being requested for each tactic within this AR, and the committee(s) that has been selected to score each tactic.

FY25 CBB/BPOC Funding Requested by Tactic					
Committee Name	Tactic	Tactic Name	Direct Costs	Implementation	Total
Safety & Product Innovation	Tactic A	Safety Research and Scientific Affairs	\$741,000.00	\$271,000.00	\$1,012,000.00
Nutrition & Health	Tactic B	Nutrition Research and Scientific Affairs	\$2,000,000.00	\$559,300.00	\$2,559,300.00
Safety & Product Innovation	Tactic C	Product Quality Research and Technical Expertise	\$835,000.00	\$300,400.00	\$1,135,400.00
Consumer Trust	Tactic D	Sustainability Research and Scientific Affairs	\$400,000.00	\$239,000.00	\$639,000.00
Domestic Marketing	Tactic E	Consumer Market Research	\$1,100,000.00	\$1,554,300.00	\$2,654,300.00
		Total	\$5,076,000.00	\$2,924,000.00	\$8,000,000.00

FY25 Other Funding Sources Requested by Tactic

The following table reports the amount of proposed and/or anticipated Other Funding sources that would be applied to this AR's tactics. The funding information in this table is for informational purposes only and demonstrates external collaboration as delineated in the 2021-2025 Beef Industry Long Range Plan.

FY25 Other Funding Sources Requested by Tactic (Informational Only)			
Funding Source	Tactic	Tactic Name	Total
Other: N/A	Tactic A	Safety Research and Scientific Affairs	
Other: N/A	Tactic B	Nutrition Research and Scientific Affairs	
Other: N/A	Tactic C	Product Quality Research and Technical Expertise	
Other: N/A	Tactic D	Sustainability Research and Scientific Affairs	
Other: N/A	Tactic E	Consumer Market Research	
		Other Funding Total	

Use the space below if you wish to provide additional comments/information on the FY25 CBB/BPOC or Other Funding amounts that are being requested for this AR's tactic(s).

N/A

Section 2 – Summary of FY24 AR Budgets and Expenses

Classification:

This AR is a continuation of, or builds upon, program work from last year. CBB will report information in the "FY24 CBB/BPOC Funding" table and the contractor will provide information for the "FY24 Other Funding Sources" table.

FY24 CBB/BPOC Funding

This table reports the amount of awarded and expended CBB/BPOC funding for this Authorization Request in FY24.

FY24 CBB/BPOC Funding			
<i>Note: The Cattlemen's Beef Board completed the fields in this table.</i>			
	AR# 2411-R		
	Direct Costs	Implementation	Total
Funds Awarded	\$4,283,500.00	\$3,516,500.00	\$7,800,000.00
Actual Expenses <i>(October 1, 2023 - June 30, 2024)</i>	\$1,503,155.00	\$1,853,579.00	\$3,356,734.00

FY24 Other Funding Sources

The following table reports the amount of committed and expended "Other Funding Sources" for this AR in FY24. The funding information in this table is for informational purposes only and demonstrates external collaboration as delineated in the 2021-2025 Beef Industry Long Range Plan.

FY24 Other Funding Sources (Informational Only)			
AR# 2411-R			
	Other Funding Source	Funds Committed	Funds Expended (October 1, 2023 – June 30, 2024)
A	Other: FSBC Funds	\$970,000.00	\$546,863.00

Use the space below if you wish to provide additional comments/information on the FY24 CBB/BPOC or Other Funding amounts that are being requested for this AR's tactic(s).

N/A

Section 3 – Historical Summary of AR Budgets and Expenses

Classification: This AR is a continuation of, or builds upon, program work from the last two years or more. CBB will report information in the "CBB/BPOC Historical Summary" table and the contractor will provide information for the "Other Funding Sources Historical Summary" table.

CBB/BPOC Funding – Historical Summary

The following table reports the amount of awarded and expended CBB/BPOC funding for this AR in FY21, FY22, and FY23.

CBB/BPOC Funding - Historical Summary				
<i>Note: The Cattlemen's Beef Board completed the fields in this table.</i>				
		FY23 AR# 2311-R	FY22 AR# 2211-R	FY21 AR# 2111-R
AR Period ¹	Start Date:	Oct. 1, 2022	Oct. 1, 2021	Oct. 1, 2020
	End Date:	Sep. 30, 2025	Sep. 30, 2024	Sep. 30, 2023
Funds Awarded		\$8,100,000.00	\$8,100,000.00	\$8,250,764.00
Actual Expenses ²		\$6,608,953.00	\$7,443,839.00	\$8,212,899.00

¹For multiyear ARs, the "End Date" reflects the date that the AR is scheduled to be completed.

²If the AR "End Date" has not occurred, actual expenses will be reflective of the following time period:
AR Start Date - June 30, 2024.

Other Funding - Historical Summary

The following table reports the amount of "Other Funding Source" expenditures for this AR in FY21, FY22, and FY23. The funding information in this table is for informational purposes only and demonstrates external collaboration as delineated in the 2021-2025 Beef Industry Long Range Plan.

Other Funding Sources – Historical Summary <i>(Informational Only)</i>						
	FY23 AR# 2311-R		FY22 AR# 2211-R		FY21 AR# 2111-R	
	Other Funding Source	Total Expenditures	Other Funding Source	Total Expenditures	Other Funding Source	Total Expenditures
A	FSBC Funds	\$895,315.00	FSBC Funds	\$657,500.00	FSBC Funds	\$736,630.00

Use the space below if you wish to provide additional comments/information on the historical CBB/BPOC or Other Funding budget and expense summaries.

N/A