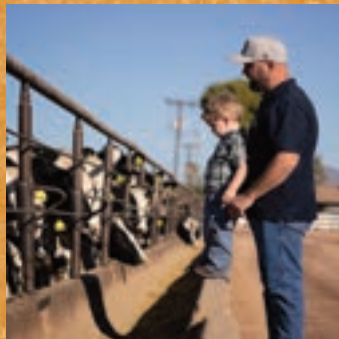
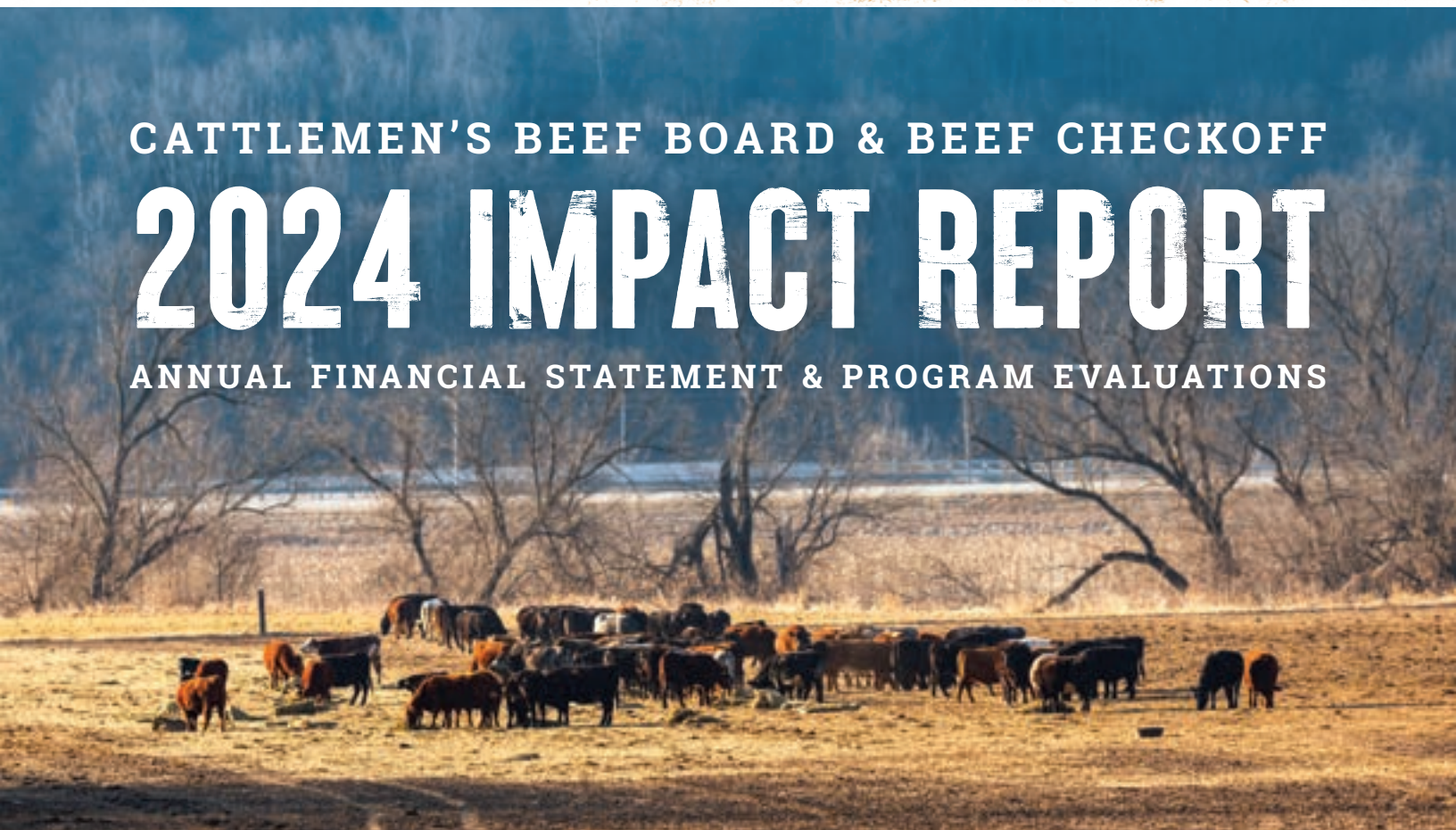




Funded by the Beef Checkoff

CATTLEMEN'S BEEF BOARD & BEEF CHECKOFF 2024 IMPACT REPORT

ANNUAL FINANCIAL STATEMENT & PROGRAM EVALUATIONS











Funded by the Beef Checkoff



**THE MISSION OF
THE CATTLEMEN'S
BEEF BOARD IS TO
SERVE AS STEWARDS
OF THE BEEF CHECKOFF
TO GROW BEEF DEMAND
AND OPTIMIZE
INVESTMENTS
MADE BY BEEF CHECKOFF
CONTRIBUTORS.**



CATTLEMEN'S BEEF BOARD AND LEADERSHIP

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A wooden sign is mounted on the side of a red barn. The sign is made of four horizontal planks. The top plank has the word 'FARMERS' in white, bold, sans-serif capital letters. The second plank features a white hand-drawn arrow with leafy ends. The third plank has the words 'WORK IN ACRES' in white, sans-serif capital letters. The bottom plank has the words 'NOT IN HOURS' in white, sans-serif capital letters. The barn's exterior is made of horizontal wooden planks, and a wooden door is visible to the right. A bright sun in the upper right corner creates a lens flare effect across the scene.

FARMERS

— — — — —

WORK IN ACRES

NOT IN HOURS



LETTER FROM THE CHAIR

The resilience of the American rancher never ceases to amaze me. It's that steadfast grit and unwavering optimism that have allowed farmers and ranchers across this great nation to build generational legacies, even in the face of tough times. When I reflect on this past year, my heart is with our fellow beef producers in Texas and Oklahoma, who endured devastating wildfires sweeping through the heartland. It's also with those across the Southeast, grappling with the aftermath of historic hurricanes and floods. Yet, I have no doubt their persistence will see them through, bolstered by the support of the beef family we all cherish.

Persistence is a trait every livestock owner holds dear. By definition, persistence means "firm or obstinate continuance in a course of action in spite of difficulty or opposition." When I think about it, this definition applies just as much to the Beef Checkoff as it does to our daily lives. Despite challenges like diminishing Checkoff dollars, the spread of misinformation from opposing groups, and increasing competition, the Beef Checkoff continues to promote beef to consumers, conduct essential research on safety, nutrition, and sustainability, and educate the public about the benefits and value of our incredible product.

This year, I encouraged Beef Board members to actively share the Checkoff story—helping producers and importers recognize the program's daily contributions to all of us. Many of you rose to the occasion, speaking at local producer meetings and industry events to explain how the Beef Checkoff works and to highlight its significant impact on those who support it.

This collective effort is a testament to the persistence that defines our industry. Just as we weather the storms, care for our herds, and protect our way of life, the Beef Checkoff continues its steadfast work on behalf of us all. It's that same persistence that will ensure our success for generations to come. Together, as producers, importers, and advocates, we embody the grit and determination that keep beef at the center of the plate and at the heart of our nation's meals.

Let's keep pressing forward—persistently, proudly, and united.



Andy Bishop
2024 Chair, Cattlemen's Beef Board
Cox's Creek, Kentucky



CATTELEMEN'S BEEF BOARD

The **Cattlemen's Beef Promotion and Research Board (CBB)**, in partnership with the **U.S. Department of Agriculture (USDA)**, oversees the **Beef Checkoff**, established by the 1985 Farm Bill. This program requires beef, dairy, and veal producers to contribute \$1 per head of cattle sold, while importers pay an equivalent amount for beef or beef products. These funds are used to support initiatives that promote beef, conduct research, drive product innovation, and educate consumers and stakeholders to increase beef demand.

The **CBB** is an all-volunteer board of 99 producers and importers. Members are nominated by certified organizations, appointed by the USDA Secretary of Agriculture, and serve unpaid, three-year terms. Membership adjusts annually based on the national cattle population. The board approves the annual budget for Checkoff-funded programs and evaluates funding proposals submitted by eligible national nonprofit, industry-governed organizations.



CHECKOFF EVALUATION COMMITTEE

The **Checkoff Evaluation Committee** oversees the evaluation of all **Authorization Requests (ARs)** funded by the **Beef Promotion Operating Committee (BPOC)**. It advises the BPOC on project outcomes, program performance, and the overall effectiveness of Beef Checkoff initiatives. Additional responsibilities include distributing quarterly program updates, conducting third-party external program reviews, and facilitating an annual survey to gauge **Qualified State Beef Councils' (QSBCs)** sentiment toward national Beef Checkoff programs.

The committee consists of **14 members**: six from the **CBB**, six directors from the **Federation of State Beef Councils**, and two ex officio **QSBC** staff executives. Among the 12 producer members, four must also serve on the BPOC—two from the CBB and two from the Federation. Members serve three-year terms, reviewed annually, and may serve up to two consecutive terms (six years).



Bilynn Johnson
Chair



Shannon Treichel
Vice Chair



Cheryl DeVuyst, PhD
Immediate Past Chair



2024 CBB LEADERSHIP AND STAFF



Andy Bishop
Chair



Ryan Moorhouse
Vice Chair



Cheryl DeVuyst, PhD
Secretary-Treasurer



Jimmy Taylor
Immediate Past Chair



Greg Hanes
Chief Executive Officer



Jeff Lutz
Chief Financial Officer



Sara Arp
Sr. Director of Operations



Cheryl Conley
Sr. Chief Accountant



Nancy Dugan
*Executive and Administrative
Coordinator*



Davis Gidney
Checkoff Education Manager



Sarah Metzler
*Sr. Director of Organizational
Communications*



Tom Novota
*Financial Compliance
Manager*



Chad Smith
*Sr. Director of Collections
Compliance*



Beka Wall
*Sr. Director of Evaluation
and Outreach*



2024 CATTLEMEN'S BEEF BOARD

ALABAMA:



Bill Lipscomb
Cow-Calf

IDAHO:



Trish Downton
Cow-Calf

KANSAS (cont.):



Larry Kendig
*Cow-Calf/
Feedlot*

MINNESOTA (cont.):



Bill Post
*Cow-Calf/
Dairy*

NEBRASKA (cont.):



Dave Hamilton
Cow-Calf

ARIZONA:



Sine Kerr
Dairy



Gwenna Prescott
*Backgrounder/
Cow-Calf/
Feedlot/Stocker*



Marisa Kleysteuber
*Cow-Calf/
Feedlot*



Janet Parker
*Backgrounder/
Stocker*



Gina Hudson
Cow-Calf

ARKANSAS:



Don Hubbell
Cow-Calf



Tucker Shaw
Seedstock



Amy Langvardt
*Auction Market/
Cow-Calf/
Seedstock*



Alfred Brandt
Dairy



Jas Livingston
*Backgrounder/
Cow-Calf/
Feedlot/Stocker*

ILLINOIS:



Caleb Plyler
*Cow-Calf/
Seedstock/
Stocker*



Doc Walker, PhD
Seedstock



Jacquelyne Leffler
*Backgrounder/
Feedlot/Stocker*



Marsha Corbin
Cow-Calf



Becky Potmesil
Cow-Calf

COLORADO:



Connie Hass
Cow-Calf



Ed Hildenbrand
Cow-Calf



Evan Lesser
Cow-Calf



Kalena Keeney-Bruce
Cow-Calf



Boe Lopez
Cow-Calf

IOWA:



Sallie Miller
*Cow-Calf/
Feedlot/
Seedstock*



David Bruene
Cow-Calf



Andy Bishop
Seedstock



Patty Wood
Cow-Calf



John Kriese
*Cow-Calf/
Seedstock*

INDIANA:



Jody Rogers
Seedstock



Ross Havens
Cow-Calf



Mitchel Logsdon
*Backgrounder/
Cow-Calf/
Feedlot/Stocker*



Verna Billedeaux
Cow-Calf



Brian Warren
*Backgrounder/
Cow-Calf/
Stocker*

FLORIDA:



Sarah Childs
Cow-Calf



Mike Holden
Cow-Calf



John Thompson
*Cow-Calf/
Stocker*



Ben Peterson
*Backgrounder/
Cow-Calf/
Feedlot/Stocker*



Mary Graner
Cow-Calf

GEORGIA:



Lujean Waters, DVM
Cow-Calf



Hayley Moss
Feedlot



Monte Bordner
*Purebred/
Seedstock*



Mike Crosley
Cow-Calf



Jason Schmidt
*Backgrounder/
Cow-Calf/
Stocker*

KANSAS:



Kristy Arnold
Cow-Calf



Jack Geiger
*Backgrounder/
Cow-Calf/
Feedlot/Stocker*



Jeri Hanson
*Cow-Calf/
Stocker*



Bree DeMontigny
Cow-Calf



Joe Foster
*Backgrounder/
Cow-Calf/
Dairy/Stocker*

MINNESOTA:



Bree DeMontigny
Cow-Calf

OKLAHOMA:



Rodney Cowan
*Backgrounder/
Stocker*

SOUTH DAKOTA (cont.):



David Uhrig
Seedstock

TEXAS (cont.):



Ryan Moorhouse
*Feedlot/
Stocker*

WISCONSIN (cont.):



Tammy Wiedenbeck
*Cow-Calf/
Feedlot/
Seedstock*

SOUTHWEST (cont.):



Ted Kingsley
(California)
Cow-Calf

TENNESSEE:



Cheryl DeVuyt, PhD
*Cow-Calf/
Stocker*



Celeste Blackburn
Dairy



Ernie Morales
Feedlot



Gwen Geis
Cow-Calf



Cortney Lawrence
(California)
Cow-Calf



Jason Hitch
Feedlot



Gary Daniel
Cow-Calf



Wesley Ratcliff
Seedstock

UNITS:

**MID-ATLANTIC
(South Carolina,
West Virginia):**



Angie Meyer
Dairy



Anne Ilse Anderson
Cow-Calf



Mark Sustaire
Dairy



Creed Ward
(West Virginia)
*Cow-Calf/
Stocker*



Kristin McQueary
(Nevada)
Cow-Calf

IMPORTERS:



Gaye Pfeiffer
*Backgrounder/
Cow-Calf/
Seedstock/
Stocker*



Jojo Carrales
Cow-Calf



Chloe Wilson
Cow-Calf

**NORTHEAST
(Connecticut, Delaware,
Maine, Maryland,
Massachusetts, New
Hampshire, New Jersey,
Rhode Island, Vermont):**



Matt Allan
(Washington
D.C.)
Importer



Andrew Banchi
(Florida)
Importer

OREGON:



Wendy Bingham
Cow-Calf



Seth Denbow
*Cow-Calf/
Stocker*



Claudia Wright
Cow-Calf



Warren Nop
(Vermont)
Dairy



Kim D'Anella
(New Jersey)
Importer

PENNSYLVANIA:



Diane Hoover
Dairy



Debbie Gill
Cow-Calf



John Ferry
Feedlot

**NORTHWEST
(Alaska, Washington,
Hawaii):**



Jason Frost
(Washington
D.C.)
Importer

SOUTH DAKOTA:



Laurie Johnson
Cow-Calf



David Henderson
Cow-Calf

VIRGINIA:



Jay Calhoun, Jr.
Cow-Calf



Marty Stingley
(Washington)
Cow-Calf



Steve Hobbs
(Montana)
Importer

WISCONSIN :



Larry Stomprud
*Cow-Calf/
Seedstock*



Bilynn Johnson
Cow-Calf



Arin Crooks
*Backgrounder/
Cow-Calf/
Stocker*



Melissa Daniels
(California)
Cow-Calf



Andrew Kopic
(Florida)
Importer



VeaBea Thomas
Seedstock



Pat McDowell
*Backgrounder/
Cow-Calf/
Stocker*



Terry Quam
Seedstock



Cathy Jauch
(California)
Cow-Calf



Doug McNicholl
(Washington,
D.C.)
Importer



FY 2024 FINANCIALS

CATTLEMEN'S BEEF PROMOTION AND RESEARCH BOARD

Statement of Assets, Liabilities, and Net Assets
Sept. 30, 2024 and Sept. 30, 2023

ASSETS	2024	2023
Cash and Cash Equivalents	\$4,983,442	\$11,710,004
Short-Term Investments	\$16,957,328	\$9,974,887
Long-Term Investments	\$3,996,282	\$1,979,904
Capital Assets, Net of Accumulated Depreciation of \$50,499 and \$48,252	\$7,516	\$9,226
Other	\$208	\$4,848
Total Assets	\$25,944,776	\$23,678,869

LIABILITIES & NET ASSETS	2024	2023
Due to Qualified State Beef Councils & Other	\$7,725	\$9,169
NET ASSETS, WITHOUT DONOR RESTRICTION:		
Designated for Future Expenses	\$13,052,498	\$14,159,777
Designated – Board Reserve	\$4,350,000	\$4,350,000
Undesignated	\$8,534,553	\$5,159,923
Total Liabilities & Net Assets, Without Donor Restriction	\$25,937,051	\$23,678,869

REVENUES	2024	2023
Assessments	\$43,425,944	\$42,191,411
Interest	\$1,131,872	\$764,383
Other	\$37,723	\$26,791
Total Revenues	\$44,595,539	\$42,982,585

EXPENSES	2024	2023
PROGRAM EXPENSES:		
Promotion	\$9,929,313	\$9,235,954
Research	\$9,168,168	\$9,216,590
Consumer Information	\$7,172,640	\$7,782,624
Industry Information	\$2,805,565	\$2,588,998
Foreign Marketing	\$7,992,404	\$8,120,483
Producer Communications	\$1,926,774	\$1,930,081
Checkoff Communications	\$227,986	\$188,212
Program Evaluation	\$260,869	\$230,593
Program Development	\$596,572	\$566,369
Total Program Expenses	\$40,080,291	\$39,859,904
SUPPORTING SERVICES:		
State Services	\$180,400	\$141,786
USDA Oversight	\$351,030	\$611,456
Supporting Services & Litigation	\$114,150	\$105,350
Administration	\$1,602,317	\$1,646,335
Total Supporting Services Expenses	\$2,247,897	\$2,504,927
Total Expenses	\$42,328,188	\$42,364,831

ASSESSMENT REVENUES	2024
QUALIFIED STATE BEEF COUNCILS:	
Alabama	\$342,913
Arizona	\$331,941
Arkansas	\$418,713
California	\$1,651,036
Colorado	\$1,542,544
Delaware	\$2,325
Florida	\$319,588
Georgia	\$295,200
Hawaii	\$13,276
Idaho	\$1,098,033
Illinois	\$336,823
Indiana	\$284,106
Iowa	\$1,689,799
Kansas	\$3,771,303
Kentucky	\$650,317
Louisiana	\$151,990
Michigan	\$288,005
Minnesota	\$740,470
Mississippi	\$277,857
Missouri	\$1,284,895
Montana	\$797,609
Nebraska	\$3,508,059
Nevada	\$89,969
New Jersey	\$3,195
New Mexico	\$584,300
New York	\$303,875
North Carolina	\$141,403
North Dakota	\$597,091
Ohio	\$342,348
Oklahoma	\$1,705,415
Oregon	\$455,434
Pennsylvania	\$346,824
South Carolina	\$63,355
South Dakota	\$1,461,156
Tennessee	\$387,868
Texas	\$5,008,506
Utah	\$313,103
Vermont	\$34,741
Virginia	\$371,303
Washington	\$585,074
West Virginia	\$79,083
Wisconsin	\$729,320
Wyoming	\$504,463
Total Qualified State Beef Councils	\$33,904,628
STATES WITHOUT QUALIFIED STATE BEEF COUNCILS:	
Alaska	\$175
Connecticut	\$11,836
Massachusetts	\$16,211
Maine	\$19,279
Maryland	\$62,583
New Hampshire	\$6,943
Rhode Island	\$209
Total States Without Qualified State Beef Councils	\$117,236
Importers	\$9,404,080
Total Assessment Revenues	\$43,425,944



PROMOTION

Promotion enables the Beef Checkoff to connect with consumers in meaningful ways so they can feel confident purchasing beef, veal, and beef products. Efforts convey beef's incredible taste and nutritional benefits while saluting the hard-working men and women who raise and provide beef for the world.

AUTHORIZATION REQUESTS

TOTAL PROMOTION FUNDING: \$9,275,000

AR Number	AR Title	Contractor/ Subcontractor	Funds Awarded	Funds Spent
2401-P	Veal Promotion	NAMI/NYBC	\$275,000	\$271,849
2402-P	<i>Beef. It's What's For Dinner.</i> Promotion	NCBA	\$9,000,000	\$8,675,738

PROMOTION ARS BY THE NUMBERS

2
ARs

20
MEASURABLE
OBJECTIVES

11
Achieved

7
Exceeded

0
Still in Progress

2
Not Achieved

**PROGRESS
TOWARD
MEASURABLE
OBJECTIVES**

Veal Promotion

AR DESCRIPTION

This Beef Checkoff AR aims to increase consumer consideration of veal by promoting **Discovery, Access, and Confidence** in veal as a protein choice. Through Veal.org, *Veal – Discover Delicious*, and strategic partnerships, the program connects directly with consumers, elevates veal's image, and modernizes marketing efforts across digital and e-commerce platforms.



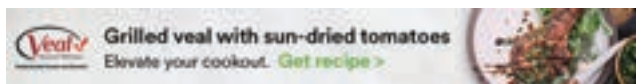
Social media platforms like Facebook, Instagram, and Pinterest inspire consumers to elevate their holidays and special occasions with flavorful dishes, such as the savory stuffed breast of veal (left) and hearty apple veal stuffing (above).

ACCOMPLISHMENT & RESULT HIGHLIGHTS

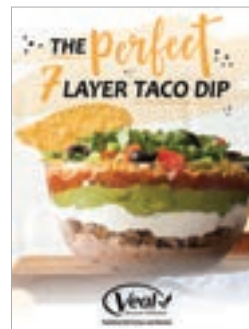
E-Commerce Campaigns Boost Veal Awareness and Sales: Veal gained greater visibility in the digital grocery space through targeted e-commerce campaigns that put the protein front and center for online shoppers. Through strategic banner ads and boosted product placements, these campaigns sparked interest and drove \$31,000 in sales across two major e-commerce platforms. One campaign in particular had a lasting



impact: within two weeks, veal gained 10.2% more total customers and attracted 52.3% new shoppers to the category, with sales momentum continuing even after the promotion ended. This digital push not only drove sales but also introduced new customers to veal as a delicious choice for home dining.



Engaging Consumers Through Social Media: This targeted social media ads successfully directed nearly 40,000 consumers to Veal.org, where they explored recipes, industry information, and more. Using paid content on platforms



like Instagram, Facebook, TikTok, and YouTube, the campaign targeted specific demographics and regions, maximizing Beef Checkoff investments. This effort not only led to a significant increase in website traffic compared to FY23 but also reached nearly 900,000 targeted consumers.

Virtual Veal Farm Tour for Classrooms: A live virtual farm tour engaged 334 mostly secondary school-aged students from over 20 New York and Pennsylvania classrooms. Led by a veterinarian overseeing the health and well-being of veal calves at one of the nation's leading veal barn systems, the tour offered valuable insights into the calf life cycle and the practices ensuring their comfort. More than 100 classrooms, representing over 1,500 students across the two states, initially registered for the event. To broaden its educational reach, a recorded version of the tour was provided to all registrants, offering a unique learning opportunity otherwise unavailable to students.



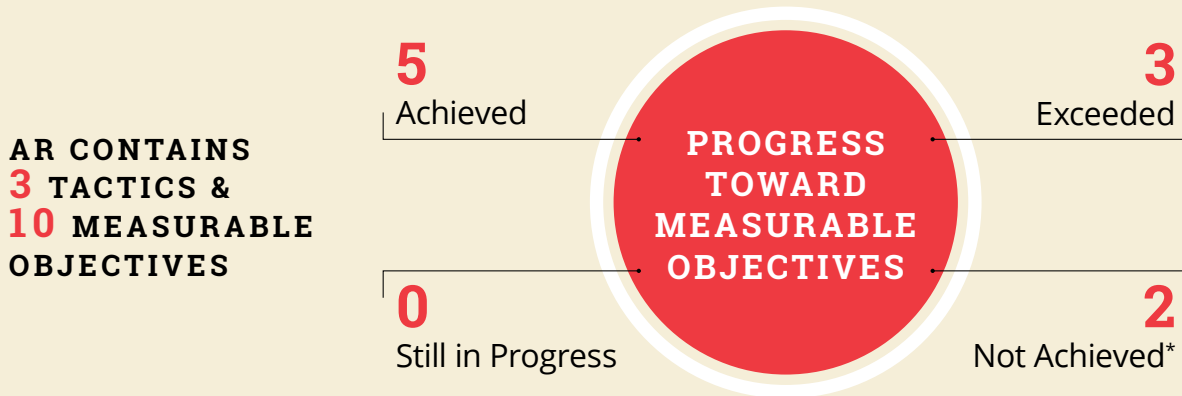
Contractor:
North American Meat Institute
Subcontractor:
New York Beef Council

Funds Awarded:
\$275,000

Funds Spent:
\$271,849

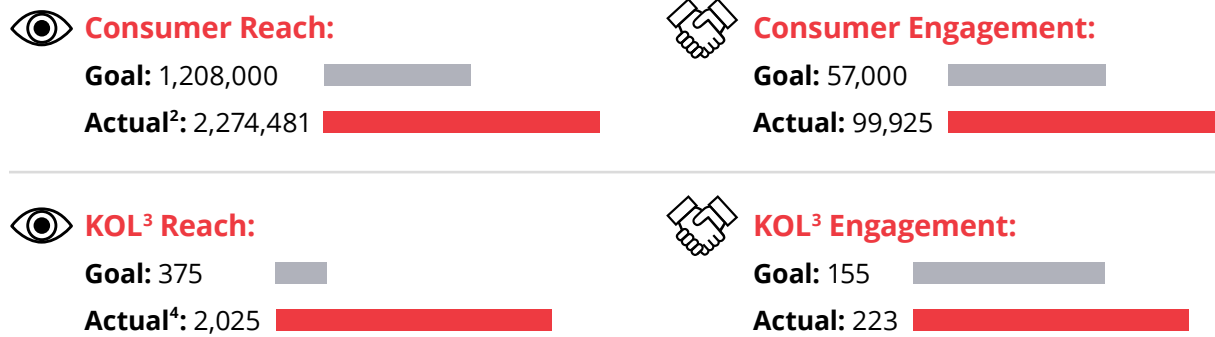


PROMOTION | 2401-P



* Measurable Objectives Not Achieved: Tactic C/MO #1: While influencers were engaged to share veal content, changes in Meta Platforms' analytics reporting affected the measurement of outreach metrics, impacting the ability to meet this goal. Tactic C/MO #2: This objective relied on cost-sharing with an industry partner. However, the partner sold its veal business during the program's fiscal year, making this objective unfeasible due to lack of additional funding.

PERFORMANCE EFFICIENCY MEASURES (PEM)¹



¹ Consumer and KOL goals, along with actual results, are aggregated across the AR's tactics.
² Actual Consumer Reach exceeded the goal by over 50%, driven by the strong performance of e-commerce campaigns and the positive impact of retargeted paid social media ads.
³ KOL=Foodservice Professionals, Influencers, Chefs, Culinary Experts, and Industry Stakeholders
⁴ Actual KOL Reach exceeded the goal by over 50% due to the inclusion of key stakeholder groups that were not initially targeted when goals for this metric were set.



KEY LEARNINGS

- Leveraging Traditional Recipes to Expand Veal Awareness:** Traditional recipe keywords like “veal parmesan” and “veal meatballs” remain the primary drivers of Veal.org search traffic. This creates an opportunity to attract consumers with classic dishes and Italian-inspired content, encouraging them to explore beyond familiar recipes and discover versatile ways to use veal in diverse cuisines.
- Evaluating Influencer Reach and Engagement Strategies:** Each year, the reach and engagement of the program's influencer content have declined, despite partnering with the same number of influencers with similar-sized audiences. This trend is likely due to increased competition in the influencer space. Moving forward, it will be crucial to explore innovative strategies to better leverage influencers, ensuring strong veal awareness and optimal cost-per-engagement.
- Benefits of Pre-Recorded Content:** Based on program feedback, pre-recorded, high-quality veal farm content would be more effective than live-streamed tours. This method offers classrooms increased flexibility, particularly for schools that cannot attend the live event but plan to incorporate the recording into their curriculum later. While live sessions can still feature interactive Q&A, pre-recorded content ensures that all students can engage with the material at a time that works best for them.

Beef. It's What's For Dinner. Promotion

AR DESCRIPTION

The *Beef. It's What's For Dinner.* AR creates and executes strategic marketing to elevate the brand and encourage beef consumption. Through high-quality content—including videos, ads, infographics, and web assets—these campaigns highlight beef's nutritional benefits, taste, and versatility. By inspiring and educating consumers, the program seeks to boost purchase intent, strengthen perceptions about beef and cattle producers, and position beef as the top protein choice.



Live sports advertisements highlighted beef as fuel for outdoor adventures.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

Beef. It's What's For Dinner. Storytelling: The *Beef. It's What's For Dinner.* program launched Chef's Night In, an extension of the Together We Bring More campaign, offering a glimpse into chefs' personal lives. This initiative brought audiences into chefs' homes as they prepared and enjoyed their favorite beef dishes with friends and family, offering a relatable, human touch to their stories. Through engaging videos and social media, the campaign reached 3.6 million views across web, social media, YouTube, and chefs' channels, connecting with a highly interested audience.



contributed an additional 300K video views from live sports fans who watched *Beef. It's What's For Dinner.* baseball- and mountain biking-themed commercials.

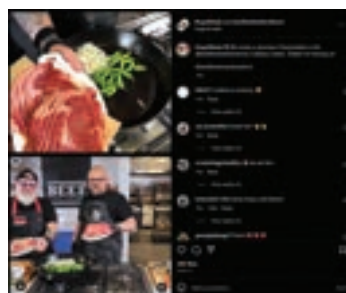


Beef. It's What's For Dinner. Connected TV (CTV)

Live Sports Advertising: This year, *Beef. It's What's For Dinner.* leveraged CTV to reach 78 million U.S. consumers watching live sports, placing ads across major networks like ESPN, NBC Sunday Night Football, Peacock, and the NFL Network. These placements reached nearly 3 million viewers, resulting in 2.8 million complete video views. The Summer Games broadcast on NBC and Peacock

Beef. It's What's For Dinner. Social Media Live

Cook-Alongs: *Beef. It's What's For Dinner.* hosted five live cook-along events on social media, offering



engaging, educational content to inspire beef purchases. By partnering with third-party chefs and influencers, the events reached over 800,000 people, expanding the program's audience. These live cook-alongs not only provided valuable real-time interaction but also remain available as a lasting resource for consumers to reference in the future, continuing to encourage beef consumption.

Contractor:
National Cattlemen's
Beef Association

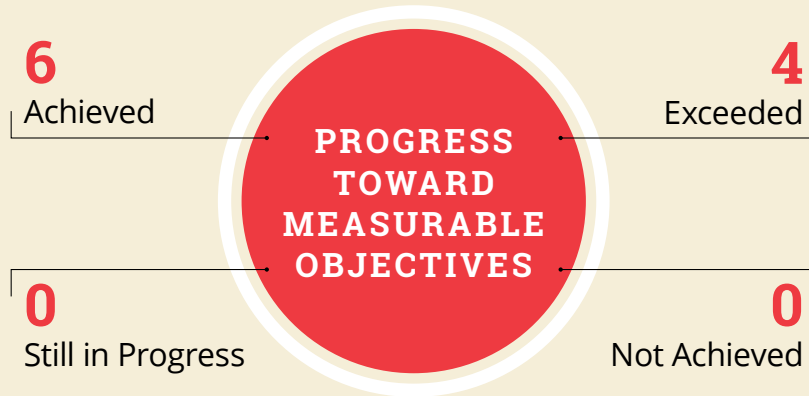
Funds Awarded:
\$9,000,000

Funds Spent:
\$8,675,738



PROMOTION | 2402-P

AR CONTAINS
2 TACTICS &
10 MEASURABLE
OBJECTIVES



PERFORMANCE EFFICIENCY MEASURES (PEM)¹



Consumer Reach:

Goal: 728,468,400

Actual: 1,088,903,404



Consumer Engagement:

Goal: 3,310,100

Actual: 4,102,449



KOL² Reach:

Goal: 7,000

Actual: 10,400



KOL² Engagement:

Goal: 400

Actual: 497



¹ Consumer and KOL goals, along with actual results, are aggregated across the AR's tactics.

² KOL=State Partners/Agencies, Retailers, Brand Partners, Influencers, Educators, and Producers



KEY LEARNINGS

• Engaging Viewers With Authentic Content:

Reviewing key metrics like average view duration—a vital KPI for video content—shows that viewers are drawn to behind-the-scenes glimpses into chefs' lives outside the restaurant. Additionally, consumers engage more when they either gain valuable knowledge, such as through how-to videos, or connect with the personalities on screen in a genuine, meaningful way.

• Expanding Connected TV (CTV) Opportunities:

Building on the strong performance of FY24 CTV live sports and Summer Games media placements, and in response to the ongoing shift from linear TV to streaming platforms, *Beef. It's What's For*

Dinner. plans to expand its CTV advertising efforts. This includes continued investments in premium placements, particularly within live sports programming, to effectively reach the growing streaming audience.

- **Diversifying Social Content:** Expanding the Instagram live cook-along series by featuring a variety of chefs and experts, and experimenting with different video formats, allowed the program to reach a larger audience. By diversifying both talent and content styles, we improved production efficiency while broadening our reach through the influencers and experts showcased in the videos.



RESEARCH

Research provides science-based information in beef nutrition, beef safety, and pathogen resistance. It grows consumer confidence in beef through strong and effective communication, and is used to respond to industry, media, and regulatory inquiries, as well as influencer and consumer concerns.

AUTHORIZATION REQUESTS

TOTAL RESEARCH FUNDING: \$8,300,000

AR Number	AR Title	Contractor/ Subcontractor	Funds Awarded	Funds Spent
2410-R	Post-Harvest Safety Research	FMPRE	\$500,000	\$165,405*
2411-R	Pre-Harvest Safety & Foundational Research	NCBA	\$7,800,000	\$4,953,681*

RESEARCH ARS BY THE NUMBERS

2
ARs

19
MEASURABLE
OBJECTIVES

5
Achieved

11
Exceeded

3
Still in Progress

0
Not Achieved

**PROGRESS
TOWARD
MEASURABLE
OBJECTIVES**

* Scientific research ARs receive three-year funding allocations to accommodate the time needed to conduct studies. Because these projects are ongoing, Funds Spent in this category is often lower than in others.

Post-Harvest Safety Research

AR DESCRIPTION

This multi-year research AR focuses on post-harvest beef safety by identifying and improving science-based interventions. A standing advisory committee, along with expert industry representatives, establish research priorities, evaluate proposals, and guide project development. Each fiscal year, findings are shared with processing sectors and stakeholders through integrated communication, educational initiatives, and outreach to enhance beef safety practices.

Outreach & Communications

- Meat Industry Food Safety Conference
- International Association for Food Protection
- Food Safety and Inspection Service
- Beef Industry Safety Summit

FOUNDATION FOR MEAT & POULTRY RESEARCH & EDUCATION
A contractor to the Beef Checkoff

BEEF
Funded by the Beef Checkoff

Beef Checkoff-funded safety research was presented at multiple conferences, where industry leaders exchanged insights on food safety in the meat industry, including research updates and best practices.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

Showcasing Research Supported by the Beef Checkoff: Key beef safety research supported by the Beef Checkoff was featured throughout the year at major industry events like the Meat Industry Food Safety Conference (MIFSC) and the Beef Industry Food Safety Council's (BIFSCO) Safety Summit, reaching hundreds of food safety professionals, dietitians, and students. Presentations at MIFSC covered topics like *Salmonella* baselines, genetic relatedness, and pathogenic testing in beef. A 2024 BIFSCO Safety Summit session, titled "*Salmonella* Implications and Virulence Testing Programs," focused on detecting virulent *Salmonella* strains, enhancing testing accuracy, and improving beef safety. Sharing these findings advances pathogen understanding, supports safe beef practices, and underscores beef's role in a healthy diet, contributing to a stronger foundation of knowledge within the industry.



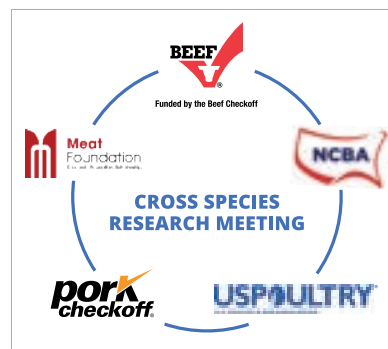
Addressing Knowledge Gaps Through Research: To improve the safety profile of beef products, the following research is being conducted: A) Compiling a comprehensive, representative *Salmonella* baseline for the U.S. beef industry across seasons and regions



to more accurately understand the pathogen's presence in ground beef, and B) Analyzing beef *Salmonella* outbreaks using a single nucleotide polymorphism (SNP) analysis pipeline to enhance outbreak traceback reliability. These and other ongoing safety research efforts strengthen pathogen-mitigation

strategies. By filling these knowledge gaps, the program is building a roadmap to ensure safe, high-quality beef products worldwide.

Research Collaboration Enhances Beef's Profile: Quarterly cross-species research meetings resumed in FY24, fostering collaboration among meat industry groups like the Beef Checkoff, Pork Checkoff, and U.S. Poultry & Egg Association. These meetings support the Beef Industry Long Range Plan by encouraging cooperation across industry advisory



committees to identify and prioritize research efforts. This regular dialogue enhances insights, consumer perceptions, and the safety and nutrition profiles of U.S. meat—including beef—and poultry products.

Contractor:
Foundation for Meat and Poultry Research and Education

Funds Awarded:
\$500,000

Funds Spent:
\$165,405



**AR CONTAINS
1 TACTIC &
3 MEASURABLE
OBJECTIVES**



Performance Efficiency Measures are not required for Research ARs.

Advancing the Scientific Dialogue:

Research funded by beef producers led to a novel *Salmonella* risk assessment approach, prompting the Food Safety and Inspection Service to use that approach in their poultry assessment, which was included in the recent *Salmonella* Framework proposal. The beef industry's leadership in scientific innovation advances the discussion of *Salmonella* risks among industry stakeholders and regulators, highlighting its proactive approach to research that enhances beef safety.

RESEARCH ARTICLE
The genomic and epidemiological virulence patterns of *Salmonella enterica* serovars in the United States

Gavin J. Fenwick*, Jane G. Pezowicz, Riggs Poulton, Daniel D. Taylor, Soheila Costantini, Francesca A. Zingales*

EPH Analytics, Fort Collins, Colorado, United States of America
* GJF@EPHAnalytics.com

Abstract
The success of *Salmonella enterica* depends on differences in pathogenesis and host preferences. We developed a process (patent pending) for grouping *Salmonella* isolates and serovars by their public health risk. We collated a curated set of 12,207 *S. enterica* whole genome sequences from human, beef, and bovine sources in the US. After conducting a virulence gene catalog for each isolate, we used unsupervised random forest methods to estimate the probability (similarity) between isolates based upon the genomic presentation of virulence traits. We then grouped isolates (virulence clusters) using hierarchical clustering (Ward's method), used non-parametric bootstrapping to assess cluster stability, and externally validated the clusters against epidemiological virulence measures from FoodNet, the National Outbreak Reporting System (NORS), and US federal sampling of beef products. We identified five stable virulence clusters of *S. enterica* serovars. Cluster 1 (high virulence) serovars yielded an annual incidence rate of domestically acquired sporadic cases roughly one and a half times higher than the other four clusters combined (Clusters 2-5, lower virulence). Compared to other clusters, cluster 4 also had a higher proportion of infections leading to hospitalization and was implicated in more foodborne and beef-associated outbreaks, despite being isolated at a similar frequency from beef products as other clusters. We also identified subpopulations within 11 serovars. Remarkably, we found *S. infantis* and *S. typhimurium* subpopulations that significantly differed in genome length and clinical case presentation. Further, we found that the presence of the *stx2B* element accounted for the genome length differences between the *S. infantis* subpopulations. Our results show that *S. enterica* strains associated with highest incidence of human infections share a common virulence repertoire. This work could be updated regularly and used in combination with foodborne surveillance information to prioritize serovars of public health concern.

Beef Checkoff-funded *Salmonella* risk assessment publication

Quantitative Risk Assessment for *Salmonella* in Raw Turkey and Raw Turkey Products

Quantitative Risk Assessment for *Salmonella* in Raw Chicken and Raw Chicken Products



KEY LEARNINGS

- Importance of Innovation in Beef Safety:** Innovation is essential for maintaining beef safety. Understanding and applying emerging technologies (e.g., genome sequencing, artificial intelligence and machine learning, and rapid pathogen detection systems) is crucial to further enhance the safety and integrity of the beef supply, ensuring its continued protection against evolving risks.
- Importance of Targeted Research in Beef Safety:** Timely research priorities are crucial for building and maintaining the safety of beef products. In addition to annual proposals, long-term, focused research is necessary to understand how pathogens are distributed within animals, regions, and climates. This knowledge is key to effectively mitigate beef safety risks.

- Processed Beef Nutrition Research Impacts and Long-Term Benefits:** In scientific research, building evidence takes years, so outcomes extend beyond the three-year funding period. This is true for processed beef nutrition research. Although Beef Checkoff funds are no longer used, the Foundation continues to share findings. Results from previous studies remain relevant, with impacts lasting at least five years through publications, presentations, and webinars.

WEBINAR
By American Meat Science Association and Meat Institute

Understanding the Science Behind Processed Meats and Health: A Comprehensive Review
THURSDAY | SEPTEMBER 26 | 1:00 PM CST

Wendy Daniels, PhD
Research Director, Food Research Institute, University of Arkansas System, Fayetteville, Arkansas

Andrew Kretschmann, PhD
Senior Professor, Department of Animal and Food Science, University of Arkansas System, Fayetteville, Arkansas

[REGISTER NOW](#)

Pre-Harvest Safety & Foundational Research

AR DESCRIPTION

This multi-year research AR focuses on beef safety, nutrition, product quality, sustainability, and market research to solidify beef's standing as a leading protein of choice. Based on sound data, research supports Beef Checkoff efforts and informs strategies to enhance consumer demand. By addressing key consumer demand drivers (nutrition, production practices, etc.), the research ultimately drives informed science-based decisions that reinforce beef's position as the top protein.

Insights from the latest consumer market research were shared in the webinar "Today's Beef Consumer—Insights for Retail," hosted on *Supermarket News*, one of the industry's most visited B2B food retail websites.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

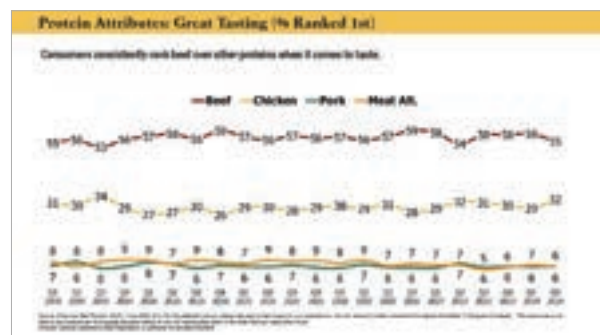
Immersive Beef Production Experience for Nutrition Scientists: This immersive experience engaged leading nutrition researchers in a two-day ranch tour, providing firsthand insights into sustainable beef production. Hosted with the Texas Beef Council and beef production partners, the program fostered trust and open dialogue between scientists, ranchers, and land managers. As a result, nutrition experts gained practical knowledge to support evidence-based recommendations for healthy, sustainable dietary patterns as part of public health guidance in the U.S. and globally. Over time, additional impacts will emerge as the scientists' acquired knowledge reaches new audiences and stakeholders through presentations, interviews, discussions on beef production, and other outreach efforts.



role in shaping media stories by providing spokespersons with key facts, offering compelling "news hooks"—timely, attention-grabbing information that makes a story newsworthy—and delivering comprehensive analysis on issues impacting beef consumers. Additionally, these findings inform and support Beef Checkoff

programs at both the state and national levels, driving alignment with consumer needs and guiding future industry initiatives.

Extending Beef Consumer Insights: In 2024, the consumer market research program broadened its reach by placing insights over 175 times across producer outlets, supply chain webinars, trade media, and consumer publications. These insights play a critical



Source: www.OklahomaFarmReport.com

Contractor:
National Cattlemen's
Beef Association

Funds Awarded:
\$7,800,000

Funds Spent:
\$4,953,681



**AR CONTAINS
5 TACTICS &
16 MEASURABLE
OBJECTIVES**

2

Achieved

11

Exceeded

**PROGRESS
TOWARD
MEASURABLE
OBJECTIVES**

3

Still in Progress

0

Not Achieved

Performance Efficiency Measures are not required for Research ARs.

Red Meat Yield Research: New technologies, such as 3D imaging, computed tomography (CT) scanning, and radar technologies, have been shown to improve the accuracy of beef composition measurements. Recent studies funded by the Beef Checkoff demonstrate that these tools can predict composition with high precision, significantly reducing human bias. CT scanning can measure whole carcass composition with near-perfect accuracy, though challenges remain with production speed and carcass size. Similarly, radar technology shows promise as a predictor of red meat yield prior to harvest by explaining variations in live cattle composition. As these technologies continue to evolve and undergo further validation, they will establish a gold-standard foundation for industry

advancements. Accurate, unbiased carcass data will ultimately enhance feedback to beef producers, supporting innovation in red meat yield measurement across the beef supply chain.



KEY LEARNINGS

- **Optimizing Beef Checkoff Resources:** With limited resources, leveraging Beef Checkoff insights across programs is essential. For example, National Beef Quality Audit findings from the Industry Information AR have helped address knowledge gaps in animal welfare and pre-harvest safety within this AR. Additionally, research on product quality and market trends has informed *Beef. It's What's For Dinner.* promotions and channel marketing focused on convenience and versatility.
- **Evolving Consumer Perspectives on Beef and Health:** Consumer market research focus groups have provided valuable insights into shifting views on health, nutrition, and the role food—particularly

beef—plays in consumers' health and wellness journey. This understanding will guide future Beef Checkoff programming at both national and state levels, ensuring alignment with consumers' health-focused priorities.

- **The Importance of Thought Leader Engagement:** A key learning from 2024 was the value of thought leader engagement in driving research impact. Feedback from the Beef Industry Safety Summit revealed that 96.7% of attendees would recommend the event, highlighting the importance of scientific engagement with key leaders to advance research initiatives and foster knowledge-sharing.



CONSUMER INFORMATION

Data and information go a long way toward helping consumers and others form opinions and make decisions about their beef purchase, preparation, and consumption. Efforts here include consumer education, as well as information for health professionals, food and nutrition communicators, retailers, and foodservice professionals.

AUTHORIZATION REQUESTS

TOTAL CONSUMER INFORMATION FUNDING: \$7,600,550

AR Number	AR Title	Contractor/ Subcontractor	Funds Awarded	Funds Spent
2420-CI	Northeast Nutrition & Health Expert, Consumer, and Athletic Program Outreach & Engagement	MICA/NEBPI	\$900,000	\$892,864
2421-CI	Beef-Based Curriculum Resources & On The Farm STEM	AFBFA	\$800,000	\$799,704
2422-CI	Thought Leaders, Experts, Media, and Channel Marketing Engagement	NCBA	\$5,900,550	\$5,585,367

CONSUMER INFORMATION ARS BY THE NUMBERS

3
ARs

28
MEASURABLE
OBJECTIVES

16
Achieved

12
Exceeded

**PROGRESS
TOWARD
MEASURABLE
OBJECTIVES**

0
Still in Progress

0
Not Achieved

Northeast Nutrition & Health Expert, Consumer, and Athletic Program Outreach & Engagement

AR DESCRIPTION

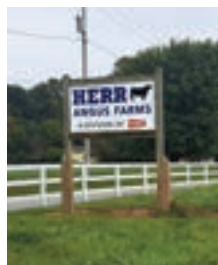
This AR targets the Northeast region, home to nearly 74 million consumers, including major cities like New York City, Boston, Philadelphia, and Washington, D.C. It engages nutrition professionals, healthcare experts, and stakeholders to promote beef through media, educational webinars, conferences, and athletics. Furthermore, by partnering with foodservice and retail experts, the initiative seeks to enhance consumer confidence and encourage beef as the top choice for protein.



UConn women's and men's basketball players take a behind-the-scenes tour of the UConn beef herd.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

Pasture-to-Plate: Beef Culinary and Farm Tour Immersive Experience: This invitation-only event engaged eight Northeast dietitians from various disciplines such as sports nutrition, media, private practice, retail, culinary, and publishing. The immersive experience provided an authentic look at beef from pasture to kitchen, empowering participants to confidently discuss beef's role in sustainable diets within their broad circles of influence. The event fostered stronger relationships, enhanced knowledge of beef nutrition, production, and culinary techniques for various cuts, and paved the way for future media and outreach collaborations.



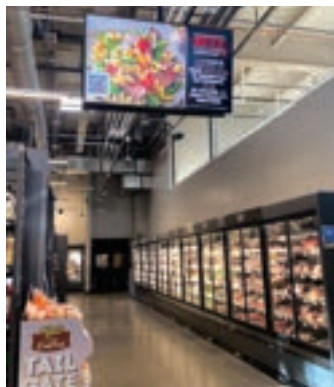
ideas. The campaign generated nearly 2.4 million impressions and over 16,500 hours of display time, leading to increased

beef sales: fresh beef sales rose by 0.93% at Amazon Fresh and 2.16% at Whole Foods, with frozen beef sales up 1.77% at Amazon Fresh. These strong results highlight the campaign's success in engaging consumers and boosting beef purchases.

Beef, the Preferred Protein of the UConn Huskies:

A strategic partnership with UConn Athletics leveraged digital ads, prominent in-arena signage, and a feature in the UConn Basketball Yearbook to highlight the campaign—Beef, the Preferred Protein of the UConn Huskies. The partnership also included onsite activities at both women's basketball and men's hockey games, directly engaging nearly 15,000 fans. In-arena signage featuring beef messaging secured over 66 minutes of screen time, while UConn basketball broadcasts reached over 9 million viewers. This multi-touchpoint approach consistently reinforced positive associations with beef,

building trust and consumer confidence throughout UConn's flagship sports events.



Reaching Amazon Fresh and Whole Foods Shoppers: In response to the growing trend of home cooking, a six-month campaign with Amazon Fresh and Whole Foods utilized in-store digital signage across Northeast locations to promote beef, featuring seasonal recipes and cooking



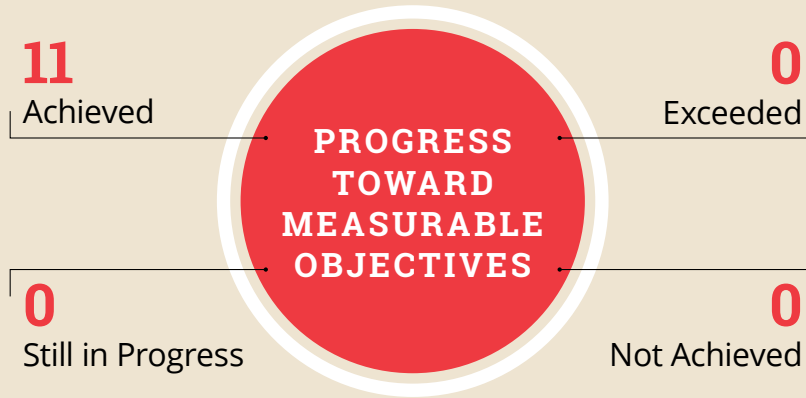
Contractor:
Meat Import Council of America
Subcontractor:
Northeast Beef Promotion Initiative

Funds Awarded:
\$900,000

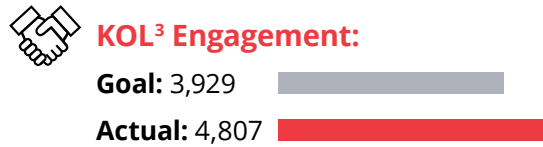
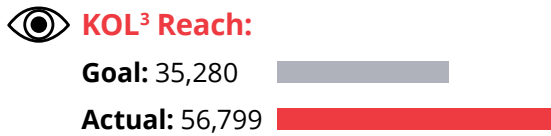
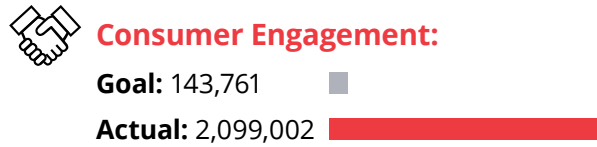
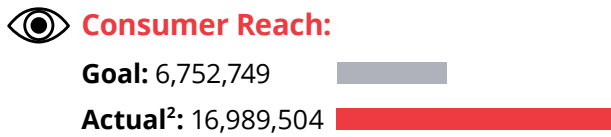
Funds Spent:
\$892,864



AR CONTAINS
3 TACTICS &
11 MEASURABLE
OBJECTIVES



PERFORMANCE EFFICIENCY MEASURES (PEM)¹



¹ Consumer and KOL goals, along with actual results, are aggregated across the AR's tactics.

² Actual Consumer Reach exceeded the goal by over 50% through retail partnerships and the program's monthly social media touchpoints with Northeast consumers.

³ KOL=Experts With Influence and Producer Advocates and Leaders



KEY LEARNINGS

- **Continued Relationship-Building and Engagement:** Ongoing relationship-building with key regional contacts through new approaches has fostered deeper engagement. This has created new opportunities and attracted a more diverse group to share beef messaging, enhancing the program's reach and impact in the region.
- **Maximizing Partnerships for Efficient Outreach:** Strategic partnerships significantly boosted program efficiency and outreach. In FY24, collaborations with the Pennsylvania Pork Council supported expanded initiatives, including the

Best Butcher Contest and the enhanced Healthcare Professional Webinar Series. Ongoing efforts to secure additional partners and funding further amplified the program's reach and impact, driving greater effectiveness in achieving outreach goals.

- **Adopting an "Always-On" Messaging Strategy:** Shifting to an always-on approach with ongoing sponsorships, rather than one-off events, allowed for a larger, more targeted reach while optimizing staff time and financial resources, resulting in greater program impact.

Beef-Based Curriculum Resources & On The Farm STEM

AR DESCRIPTION

This AR targets educators in the nation's largest school districts with its beef-centric professional development events, lesson activities, and online learning tools. Utilizing these resources that meet core science, technology, engineering, and math (STEM) requirements, urban educators become equipped to teach their students about STEM concepts through the lens of beef production. These learnings result in higher levels of critical thinking and further students' understanding of the importance of the beef industry to society.



Urban and suburban educators delve into production agriculture, discovering the role of beef cattle farming in daily life and its practical applications in science. This experience demonstrates how agricultural contexts can enrich students' understanding of real-world scientific principles.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

On The Farm STEM Immersive Beef Experience:

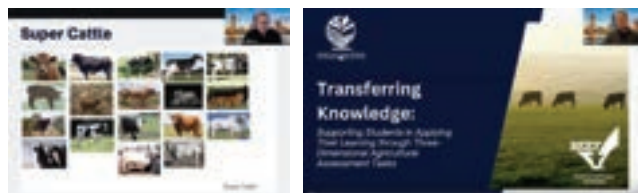
From over 300 applications, a cohort of 25 urban and suburban high school science teachers, administrators, and curriculum directors were selected to join virtual learning sessions and a four-day immersive experience in Kentucky. This program connected educators with cattle producers and industry experts, equipping them with insights into beef production and methods for integrating these concepts into Next Generation Science Standards. With over 60 hours of direct engagement, this national event fostered lasting partnerships and helped educators address misconceptions about production, animal welfare, and sustainability, while underscoring beef production's relevance to science education and society.



Science Through the Lens of Agriculture

Beef Webinar Series: This series engaged over 1,400 teachers, students, and administrators in three webinars and livestreams with industry experts, including geneticists, veterinarians, and microbiologists. The events explored scientific principles and STEM career pathways within the beef industry (e.g., geneticists, range-land scientists, food safety

inspectors, microbiologists, embryologists, and veterinarians), helping participants understand complex concepts they might not have encountered otherwise. With more than 223,000 exposures nationwide, the series supported teachers in integrating beef-focused educational materials into their classrooms.



On The Farm STEM Local Affiliate Program:

This program supported Colorado, Kansas, and New York State Beef Councils in launching state-run STEM programs to help urban and suburban educators connect science education with beef production. Over the course of a year, state partners learned to deliver impactful content while meeting national program benchmarks for quality and consistency. Post-event surveys showed strong engagement, with participants



rating the experience 4.9 out of 5. Kansas and New York reported neutral to positive shifts in perceptions of the beef industry, and 100% of participants reported an increase in their knowledge of beef production and greater confidence in incorporating it into their science curriculum.



Contractor:
American Farm Bureau
Foundation for Agriculture

Funds Awarded:
\$800,000

Funds Spent:
\$799,704



AR CONTAINS
1 TACTIC &
3 MEASURABLE
OBJECTIVES



PERFORMANCE EFFICIENCY MEASURES (PEM)



Educator Reach:

Goal: 2,500,000 
Actual: 2,905,369 



Educator Engagement:

Goal: 300,000 
Actual¹: 789,325 



KOL² Reach:

Goal: 125,000 
Actual: 128,898 



KOL² Engagement:

Goal: 10,000 
Actual³: 36,780 

¹ Actual Educator Engagement exceeded the goal by over 50%, attributed to higher-than-expected traffic and interaction with the On The Farm STEM application.

² KOL=Key Opinion Leaders

³ Actual KOL Engagement exceeded the goal by over 50%, thanks to a beef genetics unit that was circulated to KOLs in science education via the *NGSS Now* newsletter.



KEY LEARNINGS

• Impact of Immersive Professional Development:

Immersive professional development that combines experience with learning effectively shifts negative perceptions of the beef industry. The FY24 On The Farm STEM program showed that hands-on experiences reduced nearly 25% of pre-event negative perceptions, leaving 100% neutral or positive perceptions post-event—a trend observed since 2016.

• Developing High-Quality Instructional Materials (HQIM):

The demand for HQIM in science education is significant, as demonstrated by the increased access to the beef genetics unit featured in WestEd's *NextGenScience* newsletter.

This unplanned promotion helped the program surpass its reach goal with its targeted educator audience, highlighting that creating HQIM-compliant resources enhances access within the educational community.

• **On The Farm STEM Pilot:** This year's pilot of the On The Farm STEM Local Affiliate Program provided valuable insights from three state beef councils and their educational partners. By balancing national program standards with state-specific resources, an implementation guide and e-learning module were developed, laying the foundation for a train-the-trainer model in FY25 to expand local programming.

Thought Leaders, Experts, Media, and Channel Marketing Engagement

AR DESCRIPTION

This AR leverages strategic tactics to provide expertise to Beef Checkoff initiatives, state partners, and key global industry influencers, aiming to position beef as the leading protein choice for consumers. It also fosters relationships with third-party beef advocates, promotes positive media coverage of beef, and collaborates with supply chain stakeholders to highlight innovations and communicate beef's value proposition.



This program's public relations initiative launched a new media strategy that leveraged third-party experts for outreach. One such effort resulted in the feature of a classic New Orleans beef brunch recipe on the *Today Show*.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

Girls Who Grill Influencer Event: This event featured Pitmaster Erica Blaire Roby and Chef Marcia Smart, empowering 16 female influencers from travel, dining, and fashion backgrounds to explore grilling beef. It included grilling demonstrations, beef education by Dr. Jessica Lancaster, and networking with cattle producer Kimberly Ratcliff. The event generated over 200 pieces of content, reaching 421,000 consumers and achieving 75,000 engagements, expanding the exposure of the *Beef. It's What's For Dinner.* brand to new audiences.



A Science Dialogue on Improving Adolescent Health Through Nutrition: This program convened 50 nutrition scientists, physicians, dietitians, and public health experts to discuss the critical role of nutrition for adolescents (ages 9–19). The event identified research gaps and opportunities to improve diet quality and nutrient adequacy for teens and tweens, with

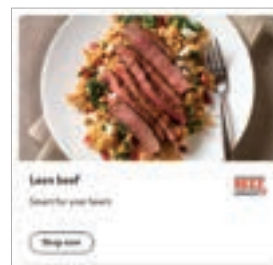


participants emphasizing the need for evidence-based dietary guidance to support adolescent health and well-being. To advance research and nutrition solutions for this critical developmental period, collaborators will develop published proceedings as an outcome of this event.

Launch of the Beef Media Expert Program: Three third-party experts were contracted to provide timely quotes, recipes, and content for media outreach, enabling quicker responses to media requests and greater leverage during key media moments. As a result, more high-impact placements were secured, including appearances on the *Today Show* and quotes on Fox.com. Through syndication and satellite media tours, the experts contributed to over 900 placements, reaching a potential audience of more than 1 billion.



Lean Beef E-Commerce Campaign: To promote beef as part of a healthful diet during American Heart Month, an e-commerce campaign was launched with a national club store. Nutrition-themed beef ads appeared on retailer sites, mobile apps, and popular platforms like Weather.com and the *Today Show* online.



The campaign generated \$31 in beef sales for every \$1 invested, resulting in \$11.2 million in incremental sales. Additionally, 26% of ad-exposed buyers were new customers, highlighting the power of e-commerce in driving beef purchases.

Contractor:
National Cattlemen's
Beef Association

Funds Awarded:
\$5,900,550

Funds Spent:
\$5,585,367



AR CONTAINS
4 TACTICS &
14 MEASURABLE
OBJECTIVES



PERFORMANCE EFFICIENCY MEASURES (PEM)¹



Consumer Reach:

Goal: 32,384,000 
Actual: 35,617,365 



Consumer Engagement:

Goal: 1,660,000 
Actual: 2,210,947 



KOL² Reach:

Goal: 568,500 
Actual: 784,916 



KOL² Engagement:

Goal: 124,250 
Actual: 131,436 

¹ Consumer and KOL goals, along with actual results, are aggregated across the AR's tactics.

² KOL=Thought Leaders, Nutrition Key Opinion Leaders, Media, and Channel Partners



KEY LEARNINGS

- **Cross-Disciplinary Advocacy:** A key takeaway for 2024 was the power of uniting advocates from diverse fields, as demonstrated by the Prime Partners Summit. Collaboration among cattle producers, food creators, and nutrition experts fostered deeper connections and a shared passion for promoting beef and nourishing consumers.
- **Collaboration on Shared Interest:** The NourishNow event highlighted the value of collaboration, bringing together a children's nutrition center and USDA Agricultural Research

Service experts to share research focused on improving adolescent health, demonstrating the power of engaging on common interests to drive impactful outcomes.

- **Leveraging Third-Party Media Experts:** Leveraging trusted, third-party media experts led to increased media outreach, faster responses, and more placements, resulting in greater brand visibility. This program's success with third-party experts will continue as a key strategy in the coming fiscal year.

A photograph of several brown cows with white markings on their faces and ears, standing in a metal pen. The scene is illuminated by the warm, golden light of a sunset, with a large blue metal barn in the background.

INDUSTRY INFORMATION

Having an accurate understanding of the beef industry helps its participants promote a positive cattle and beef climate. These efforts work to develop new markets and marketing strategies, and increase efficiency and activities through programs focused on issues, management, public relations, and beef and veal quality assurance.

AUTHORIZATION REQUESTS

TOTAL INDUSTRY INFORMATION FUNDING: \$2,819,450

AR Number	AR Title	Contractor/ Subcontractor	Funds Awarded	Funds Spent
2430-II	Veal Quality Assurance	NAMI	\$55,000	\$54,793
2431-II	Antibiotics Symposium	NIAA	\$60,000	\$60,000
2433-II	Issues and Crisis Management, Beef Advocacy Training and Engagement, and Beef Quality Assurance	NCBA	\$2,704,450	\$2,479,233

INDUSTRY INFORMATION ARS BY THE NUMBERS

3
ARs

17
MEASURABLE
OBJECTIVES

7
Achieved

10
Exceeded

0
Still in Progress

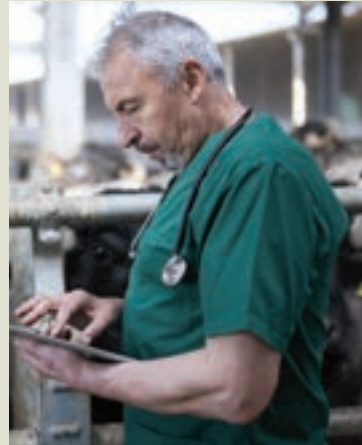
0
Not Achieved

**PROGRESS
TOWARD
MEASURABLE
OBJECTIVES**

Veal Quality Assurance

AR DESCRIPTION

The Veal Quality Assurance (VQA) AR provides education and certification to ensure ethical, science-based care for formula-fed veal calves. In collaboration with veterinarians and nutritionists, producers follow best practices and regulatory standards to prioritize animal welfare at every stage. The program aims to deliver a consistent, safe, and high-quality product that meets or exceeds consumer and regulatory expectations, ensuring wholesome veal produced with care and responsibility.

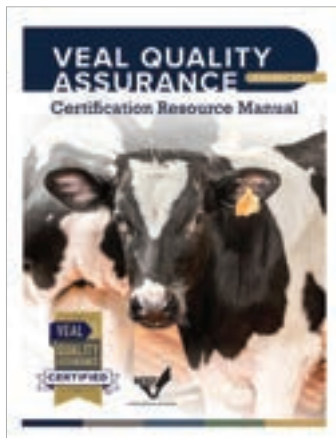


With a 95% industry certification rate, the VQA program requires participants to maintain a veterinarian-client-patient relationship, with a licensed veterinarian verifying and documenting compliance with certification standards on a three-year cycle.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

Technical Review of the Veal Quality Assurance (VQA)

Program: The VQA program recently completed a technical review, updating its Certification Resource Manual. The new manual outlines high standards for the care of formula-fed veal calves, emphasizing science-based practices and collaboration with veterinarians and nutritionists to prioritize animal welfare. Key changes



include incorporating the Five Domains of Animal Welfare model and focusing on expected outcomes for certification. Updated resources were shared with 90 stakeholders, including 26 who participated in an educational webinar. Over 200 people also reviewed the materials online through media and news coverage.



Veal Summit: Held virtually in April, the Veal Summit brought together 35 industry stakeholders, including veal farmers, Cattlemen's Beef Board members, and state beef council staff, to review key program initiatives. The event featured the updated VQA Certification Resource Manual and strategic plans for the upcoming

fiscal year and beyond. Attendees participated in a live poll to provide real-time feedback on program objectives, resulting in a positive rating of 4.3 out of 5 for the program's value to the industry. The summit also featured the latest consumer research on veal and updates on Beef Checkoff-funded programs, providing valuable insights for FY25 planning.

Contractor:
North American
Meat Institute

Funds Awarded:
\$55,000

Funds Spent:
\$54,793



AR CONTAINS
1 TACTIC &
3 MEASURABLE
OBJECTIVES



PERFORMANCE EFFICIENCY MEASURES (PEM)



Veal Farmer/Grower Reach:

Goal: 225

Actual¹: 238,619



Veal Farmer/Grower Engagement:

Goal: 115

Actual: 109



KOL² Reach:

Goal: 40

Actual³: 453



KOL² Engagement:

Goal: 20

Actual³: 431

¹ Actual Veal Farmer/Grower Reach exceeded the goal by over 50% due to unexpected media coverage of the updated VQA manual.

² KOL=Industry Stakeholders

³ Actual Veal Farmer/Grower Reach and Engagement results exceeded the goals by over 50% due to increased interest in the updated manual and additional VQA resources.



KEY LEARNINGS

- **Enhancing Engagement of Virtual Meetings:** Holding the Veal Summit virtually continues to be an efficient and cost-effective way to connect with industry stakeholders and veal growers. However, improvements in facilitation are needed to ensure all attendees can actively engage and provide feedback. Although the speakers and topics in FY24 were valuable, the full schedule restricted opportunities for discussion. This will be addressed in FY25 to allow for more interaction with attendees.
- **Establishing a Strong Program Framework:** The comprehensive technical review process in FY23, followed by the implementation of the updated VQA Certification Resource Manual and educational webinar in FY24, has laid a solid

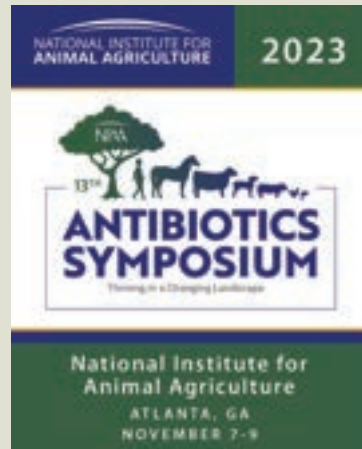
foundation for the veal industry over the next few years. In FY25, the focus will shift to enhancing veal farmer education and certification, including re-certification efforts.

- **Building Consumer Trust in Veal:** The VQA program was evaluated in FY23, with findings highlighting its widespread industry adoption and role in standardizing best practices to ensure product quality. It has also made progress in enhancing consumer trust in veal production. Growing consumer interest in food production underscores the continued need for programs like VQA. With the updated program in place, the focus will now shift to measuring its impact on enhancing consumer trust in veal.

Antibiotics Symposium

AR DESCRIPTION

Antibiotic stewardship continues to be a top priority for the beef industry, and this AR enhances the dialogue of science-based information between animal, human, and environmental health leaders. The knowledge and insights shared increase attendees' awareness of antimicrobial use in animal and human health as well as in sustainable food production. Further, program content empowers beef producers with factual talking points that enable them to effectively engage with influencers, consumers, and leaders who have the potential to impact decisions regarding antibiotic use.



Leaders in animal, human, and environmental health convened at the 13th Annual Antibiotics Symposium to exchange science-based insights and engage in open dialogue on responsible antibiotic use and antimicrobial resistance.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

Enhancing Relationships With Public Health Leaders:

As part of the FY24 program year, the 2023 NIAA Antibiotics Symposium strengthened collaboration among leaders in animal agriculture and human, plant, and environmental health. Focused on antimicrobial stewardship and resistance through a *One Health* approach, this unique event enabled direct engagement between farmers, ranchers, and key U.S. federal public health agencies—including the Centers for Disease Control and Prevention, U.S. Department of Agriculture, Food and Drug Administration, Environmental Protection Agency, U.S. Department of State, and National Institutes of Health. The symposium advanced partnerships critical



for research, education, and communication efforts aimed at promoting the health of people, animals, and ecosystems through responsible antimicrobial use.

their operations underscores the program's impact in positively shifting key leaders' perceptions.

Pre-Tour Responses:

- Biosecurity focused
- Defensive, political
- Important and mysterious
- Big, complex

Post-Tour Responses:

- Biosecurity leaders
- Committed, well-intentioned
- Innovative, sustainable
- Professional, data driven

Farmer, Rancher, and Veterinarian Engagement With Centers for Disease Control and Prevention (CDC) Leaders:

An interdisciplinary group of 18 agricultural leaders from organizations such as the Cattlemen's Beef Board, National Pork Board, and the American Veterinary Medical Association visited CDC campuses to engage with key officials. They presented topics affecting animal agriculture to the entire team in the Division of Foodborne, Waterborne, and Environmental Diseases. This engagement strengthened collaboration, particularly by training CDC scientists on better communication with agricultural leaders and CDC audiences, and addressing misconceptions, such as the unfounded link between confined animal feeding operations (CAFOs) and disease outbreaks.



Interactive Farm and Ranch Experiences:

The symposium fostered an environment to expand on-farm and ranch tours to include key opinion leaders (KOLs) from state and federal public health agencies. Covering topics like antimicrobial stewardship, animal welfare, environmental stewardship, and worker safety, these tours resulted in significant attitude shifts among KOLs. All respondents reported increased knowledge, stronger connections, and a high likelihood of applying insights into public health practices. Notably, the way participants described agricultural producers and

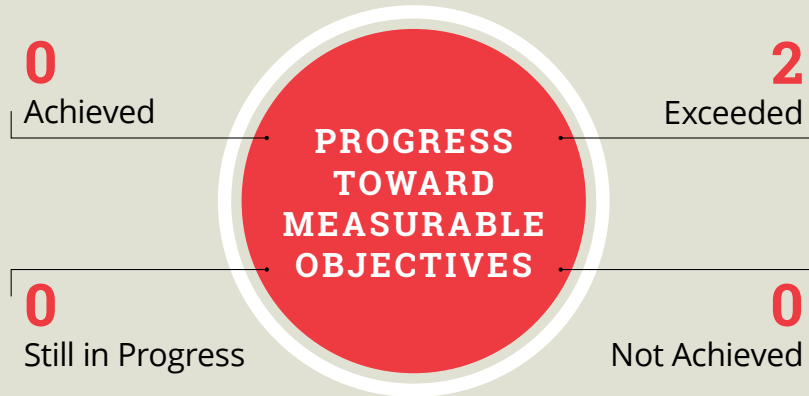
Contractor:
National Institute for
Animal Agriculture

Funds Awarded:
\$60,000

Funds Spent:
\$60,000



AR CONTAINS
1 TACTIC &
2 MEASURABLE
OBJECTIVES



PERFORMANCE EFFICIENCY MEASURES (PEM)



Producer Reach:

Goal: 65,000

Actual: 102,500



Producer Engagement:

Goal: 1,750

Actual: 3,150



KOL¹ Reach:

Goal: 1,100

Actual²: 4,200



KOL¹ Engagement:

Goal: 175

Actual²: 650



¹ KOL=CDC, USDA, FDA, etc. Leaders and Processor, Retail, and Restaurant Leaders

² Actual KOL Reach and Engagement results exceeded the goals by over 50%, thanks to strong media coverage of the program's press releases on the symposium and related engagements.



KEY LEARNINGS

• **Strengthening Trust Through Ongoing Collaboration:** Food safety remains a top priority for public health leaders. This program has fostered increased trust among state and federal public health officials in animal agriculture's policies and practices related to antimicrobial stewardship, food safety, environmental stewardship, and animal welfare. Ongoing collaboration has strengthened relationships and enhanced confidence in the industry's commitment to addressing these critical issues.

• **The Value of Real-World Experiences:** Onsite tours are a powerful tool for building understanding. Public health leaders value boots-on-the-ground experiences to gain deeper insights into beef production and the broader animal agriculture industry. These tours bridge knowledge gaps, foster appreciation of industry practices, and promote greater collaboration and informed decision-making.

Issues and Crisis Management, Beef Advocacy Training and Engagement, and Beef Quality Assurance

AR DESCRIPTION

This AR encompasses three key industry-focused areas:

- **Issues and Crisis Management:** Provides essential resources, including crisis plans, media outreach materials, response statements, and digital content, to effectively manage and respond to crises and emerging issues.
- **Beef Advocacy Training and Engagement (BATE):** Equips individuals within the beef community with the knowledge, skills, and resources to become credible advocates and engage in meaningful conversations addressing consumer concerns.
- **Beef Quality Assurance (BQA):** Delivers educational programs for producers, focusing on critical issues

that influence consumer trust—ranging from animal well-being to BQA certification—to ensure beef quality and strengthen demand.



The Prime Partners Summit brought producer spokespeople together with dietitians and influencers, empowering them to share positive beef stories through education and meaningful discussion.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

Issues Management of the Avian Influenza Outbreak:

The Issues and Crisis Management and Planning program effectively responded to the Avian Influenza (HPAI) outbreak in dairy cattle by closely monitoring the situation and developing critical resources. Timely situational and media updates were provided, offering essential guidance to beef industry partners. Through proactive crisis preparedness and comprehensive media monitoring, this effort played a key role in safeguarding consumer confidence in beef and ensuring the industry was prepared to manage the crisis.



better equipped to share accurate beef industry information across social media, generating over 260 posts and reaching a combined following of 3.2 million, further amplifying the beef message.

BQA Team Collaboration and Engagement: The BQA program fostered strong collaboration between national and state teams, effectively addressing challenges such as high staff turnover in state coordinator positions. In FY24, the national team engaged with 40 of 42 state coordinators, aligning BQA certification standards. Results showed that 92% of coordinators used the BQA HUB resources, and 98% were satisfied with the national program's guidance, providing valuable feedback to improve future collaboration and communication.

Prime Partners Advocacy Summit: This summit convened 30 influencers and beef advocates for an immersive learning experience, covering beef nutrition, culinary applications, sustainability, and ranching practices. It strengthened relationships with existing



advocates and fostered new collaboration opportunities within the Beef Checkoff program managed by NCBA. As a result, attendees were



Contractor:
National Cattlemen's
Beef Association

Funds Awarded:
\$2,704,450

Funds Spent:
\$2,479,233



AR CONTAINS
3 TACTICS &
12 MEASURABLE
OBJECTIVES



PERFORMANCE EFFICIENCY MEASURES (PEM)¹



Producer Reach:

Goal: 317,000

Actual²: 1,177,591



Producer Engagement:

Goal: 114,000

Actual: 211,163



KOL³ Reach:

Goal: 65,000

Actual: 94,488



KOL³ Engagement:

Goal: 15,500

Actual: 27,557

¹ Producer and KOL goals, along with actual results, are aggregated across the AR's tactics.

² Actual Producer Reach exceeded the goal by over 50% due to BATE's new state-level programs and partnerships, increased outreach, and additional calls to action.

³ KOL=Producer Advocates and Leaders and Producer Key Opinion Leaders



KEY LEARNINGS

- **Artificial Intelligence (AI) Insights to Improve Issues Monitoring:** The Digital Command Center integrated AI-driven summaries into its monitoring software, improving the team's efficiency in providing real-time updates and analyzing trends at both the state and national levels, ultimately enhancing overall responsiveness.
- **Collaboration Across Program Areas:** A key learning for the beef advocacy team was the value of internal collaboration, demonstrated by the Prime Partners Advocacy Summit. Bringing

together beef advocates, food creators, and nutrition experts fostered dynamic discussions and meaningful connections, amplifying the beef industry's message.

- **State and National Partnerships:** Strong partnerships between state and national BQA teams improved the quality and consistency of training efforts, resulting in a record high of over 212,000 active BQA certifications and showcasing the power of collaboration to achieve impactful results.

A chef in a kitchen, wearing a white shirt and a red apron with a white grid pattern, is cooking. Large flames are rising from a grill or stove in front of him. He is holding a fork and a piece of food. The background is a warm, orange-toned kitchen setting.

FOREIGN MARKETING

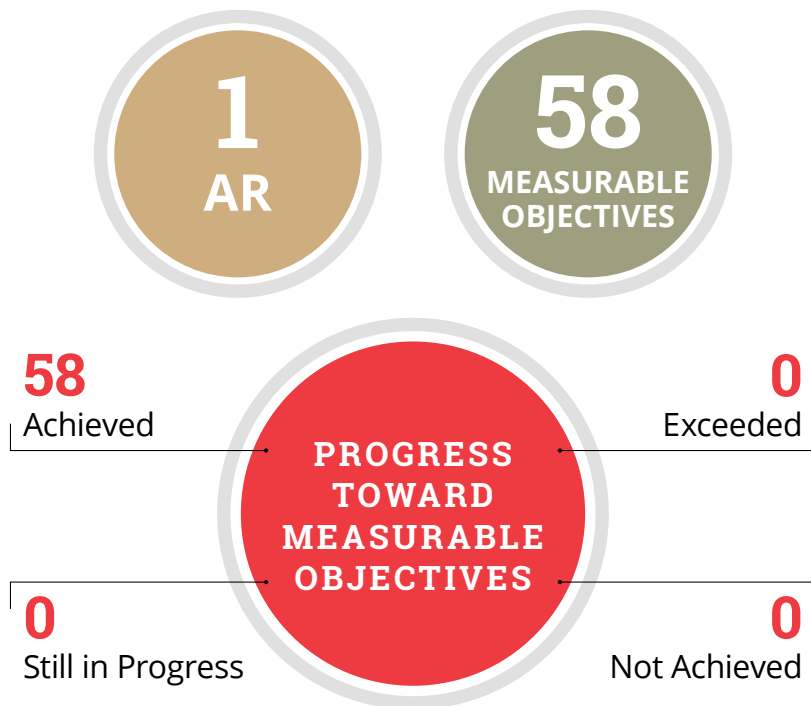
Through international marketing efforts, the Beef Checkoff maximizes U.S.-produced beef's access to foreign markets by expanding market penetration in existing locations, entering new and emerging markets, and improving global consumers' perceptions and trust in the product.

AUTHORIZATION REQUEST

TOTAL FOREIGN MARKETING FUNDING: \$8,150,000

AR Number	AR Title	Contractor/ Subcontractor	Funds Awarded	Funds Spent
2440-FM	International Market Development & Access	USMEF	\$8,150,000	\$8,147,333

FOREIGN MARKETING AR BY THE NUMBERS



International Market Development & Access

AR DESCRIPTION

This AR builds beef demand through in-country relationships, extensive market knowledge, and an understanding of each country's/region's unique consumer demand drivers. In addition, in-depth monitoring and understanding of global economic trends, beef consumption, domestic beef production, and import competitors are used to take advantage of growth opportunities and defend market share.



Retail promotions like tasting demonstrations, advertisements, and in-store signage are effective strategies for boosting interest in U.S. beef and driving sales.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

Innovation and Market Development for Variety Meats

- **South America:** A collaboration with a Peruvian chef led to the creation of the "Power Burger," a high-protein, iron-rich blend of beef liver and pork. Presented to Peruvian importers, the burger received positive consumer feedback, resulting in its commercial registration for production in Peru. Building on this momentum, efforts to promote U.S. beef liver as an iron-rich food will continue, driving consumption through value-added products like burgers and chorizos and expanding commercial opportunities for U.S. beef liver.



Building on this momentum, efforts to promote U.S. beef liver as an iron-rich food will continue, driving consumption through value-added products like burgers and chorizos and expanding commercial opportunities for U.S. beef liver.

- **South Korea:** Increased inventory of U.S. beef variety meats pressured importer revenues, prompting the search for new market channels. One of Korea's largest U.S. meat importers, a major supplier to Costco Korea, began offering boiled U.S. beef tendon at 18 outlets, marking the first heated item sold in the fresh meat section. The product was promoted with 14 days of tasting demonstrations in June and July, selling nearly 4,000 units (1.4 kg each) and moving 11,000 lbs. (approximately \$70,000) of U.S. beef tendons.



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Impactful Promotions With Major Retailers

- **China:** Sam's Club has a strong presence in China's retail market and plays a key role in U.S. beef sales. In 2023, Sam's generated \$11.2 billion in sales, with 47%



from online and 65% from U.S. chilled beef. To boost U.S. beef recognition, a promotional partnership was launched, including training for 121 employees at 11 stores and a trip to Korea by the Sam's purchasing team. The training enhanced cutting skills and reduced monthly meat loss by 0.1%, while the Korea trip offered valuable insights into the U.S. beef industry. This effort helped drive a 3% increase in the Sam's import volume of U.S. chilled beef, despite a 14% decline in overall U.S. beef imports to China.

- **Indonesia & Vietnam:** A major Indonesian importer launched U.S. beef sampling and branding in eight Lotte Mart and The FoodHall outlets, boosting market share. Cooking demos led to a 50% sales increase, from 12,000 lbs. to 18,500 lbs., with post-promotion sales remaining 32.14% higher. Both chains plan to expand the promotion in 2025. In Vietnam, Lotte Mart's U.S. beef promotion festival resulted in a 274% sales increase compared to the previous month, surpassing targets by 172% and significantly boosting U.S. beef awareness across 16 locations.



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Foodservice Expansion Through Training and Ongoing Support

- **Europe:** In collaboration with a key importer, workshops were held for top hospitality, restaurant, and institutional (HRI) clients. Led by a renowned Italian

Contractor:
United States Meat
Export Federation

Funds Awarded:
\$8,150,000

Funds Spent:
\$8,147,333



**AR CONTAINS
13 TACTICS &
58 MEASURABLE
OBJECTIVES**

58

Achieved

0

Exceeded

**PROGRESS
TOWARD
MEASURABLE
OBJECTIVES**

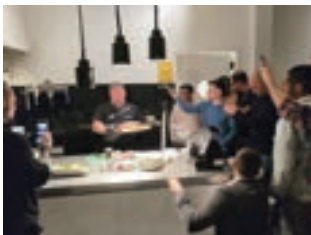
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Still in Progress

0

Not Achieved

Performance Efficiency Measures are not required for the Foreign Marketing AR.



pitmaster, the tasting sessions aimed to boost U.S. beef sales of secondary cuts such as chuck roll, striploin, inside cap off, inside skirt, and hanging tender. Over

530 chefs, restaurant owners, and wholesalers attended, responding enthusiastically and placing immediate new orders for these cuts.

- **Japan:** Promotional efforts in Okinawa targeted untapped buyers in the meat trade and foodservice sectors, showcasing the quality and



flavor of U.S. beef. In February, a seminar featuring six suppliers and a tasting session introduced over 140 regional meat trade

members to U.S. beef, leading to increased orders and menu placements. In June, a follow-up seminar for 24 buyers from 14 foodservice establishments showcased value-added U.S. beef offerings, leading to 10 companies incorporating U.S. beef into their menus.

- **Mexico:** *Meat on Wheels* showcased U.S. beef cuts through dishes across cities and venues like vineyards, hotels, restaurants, and haciendas. This mobile workshop visited five states known for vibrant tourism and culinary scenes, featuring sirloin, tenderloin, prime ribs, brisket, ground beef, and ribs. The program accelerated U.S. beef adoption in Mexico's foodservice sector, building a strong network of chefs, hotels, and restaurants, converting many establishments to U.S. beef.



KEY LEARNINGS

- **Partnership Quality Over Quantity:** Building strong, committed partnerships is key to boosting U.S. beef sales. Fostering deeper cooperation and targeting high-quality partners who prioritize U.S. beef leads to better sales outcomes than simply focusing solely on the number of partners.
- **Foundational Training for Foodservice Staff:** To address high turnover, the program will introduce foundational back-to-basics courses for new staff. Regular communication, in-person

events, and product sampling will strengthen the market presence and meet the growing demand for more in-depth training.

- **Strategic Social Media Engagement:** Partnering with carefully chosen influencers and local collaborators enables precise outreach to the right audience. This strategy maintains control over communication while delivering impactful content that drives sales and market growth through focused platforms and messaging.



PRODUCER COMMUNICATIONS

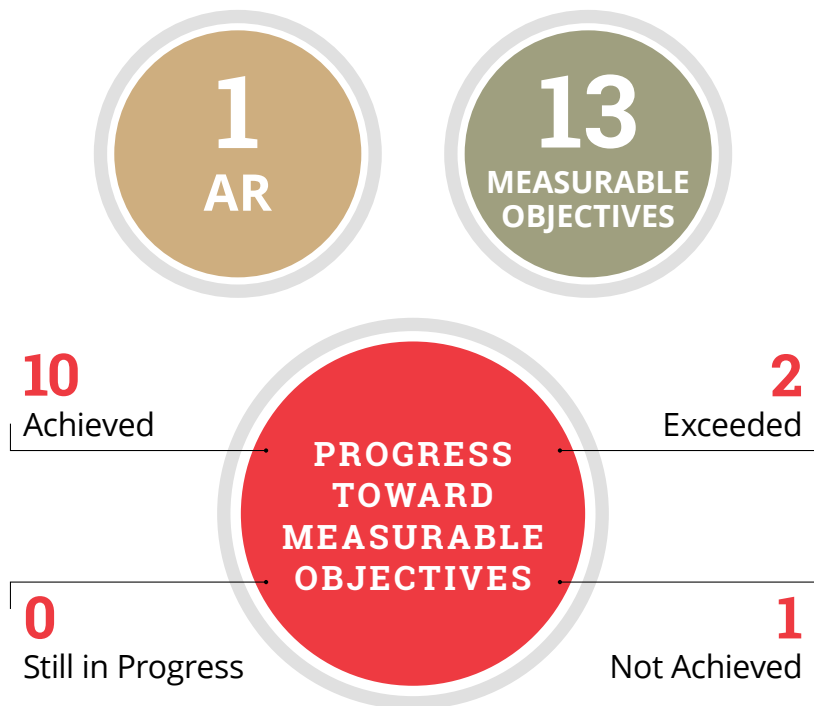
Producer Communications work establishes a direct and ongoing line of communication with the producers and importers who pay the Beef Checkoff. It reports how their Checkoff dollars are invested, shares program successes and results, and builds understanding about Checkoff roles, responsibilities, and processes.

AUTHORIZATION REQUEST

TOTAL PRODUCER COMMUNICATIONS FUNDING: \$1,800,000

AR Number	AR Title	Contractor/ Subcontractor	Funds Awarded	Funds Spent
2450-PC	Producer Communications of Beef Checkoff Programs	CBB	\$1,800,000	\$1,778,371

PRODUCER COMMUNICATIONS AR BY THE NUMBERS



Producer Communications of Beef Checkoff Programs

AR DESCRIPTION

This AR actively engages Beef Checkoff investors and key stakeholders to enhance the understanding of national Beef Checkoff-funded initiatives. It utilizes various channels—online, radio, trade media, print, and collaborations with Qualified State Beef Councils—to share information, address misconceptions, and improve transparency and communication across the industry.



The Drive has established itself as a vital communication tool, earning one of the highest honors in agricultural communications this year, as recognized by agricultural marketing peers and publishers.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

Expansion of Beef Checkoff Representatives on Industry Podcasts: In FY24, this program researched beef and agriculture podcasts, identified key influencers, and analyzed content formats. While creating a podcast was deemed inefficient, the team successfully placed Beef Checkoff representatives as guests on 12 leading podcasts. This initiative significantly expanded outreach, engaging diverse beef producers across the U.S. through high-profile platforms like *Farm to Table Talk* and *Agri Talk*, enhancing visibility and fostering stronger producer engagement.



250 posts per quarter, the initiative gained more than 5,000 new followers, boosting engagement across producer-focused platforms.

Expanded Producer-Facing Social Media Presence: The Beef Checkoff's social media presence was expanded by adding Instagram to reach younger producers, alongside established channels like Facebook, Twitter/X, LinkedIn, and YouTube. With nearly



The Drive Newsletter Earns Three National Awards:

The Drive print newsletter won two prestigious national awards: the Best of NAMA Award for Best Ag Industry Newsletter and the national Merit Award from the Agricultural Relations Council (ARC). In addition, *The Drive* e-newsletter won top honors for Best Digital Publication from the competitive Livestock Publications Council. Competing against leading agricultural companies, including John Deere, Farm Bureau, New Holland, Zoetis, and others, *The Drive* stood out for its excellence, further solidifying its industry reputation. These accolades position *The Drive* as one of the top national agricultural publications.



Contractor:
Cattlemen's Beef Board

Funds Awarded:
\$1,800,000

Funds Spent:
\$1,778,371



AR CONTAINS
**3 TACTICS &
13 MEASURABLE
OBJECTIVES**

10

Achieved

2

Exceeded

**PROGRESS
TOWARD
MEASURABLE
OBJECTIVES**

0

Still in Progress

1

Not Achieved*

* Measurable Objective Not Achieved: Despite efforts to grow *The Drive's* print and email databases by 10% in FY24, the database cleanup practices hindered growth, resulting in a 5.25% increase in subscribers.

PERFORMANCE EFFICIENCY MEASURES (PEM)¹



Producer Reach:

Goal: 21,310,238

Actual: 32,344,592



Producer Engagement:

Goal: 113,405

Actual²: 239,944



KOL³ Reach:

Goal: 10,102

Actual: 10,542



KOL³ Engagement:

Goal: 9,514

Actual: 13,346

¹ Producer and KOL goals, along with actual results, are aggregated across the AR's tactics.

² Actual Producer Engagement exceeded the goal by over 50% driven by increased participation at state producer meetings and the Livestock Marketing Association convention.

³ KOL=Producer Key Opinion Leaders



KEY LEARNINGS

- **Expanding Reach Through Agricultural Podcasts:** With podcasts growing in popularity among beef producers, key opinion leaders will continue to be featured on agricultural podcasts nationwide. This strategy enables the program to engage diverse audiences while ensuring operational efficiency.
- **Diversifying Engagement Through Social Media:** Social media, especially video and interactive content, plays a key role in driving producer engagement with the Beef Checkoff. Growth

on Instagram targets younger producers, while LinkedIn helps connect with agribusiness and industry leaders for updates.

- **Communicating Relevant Information:** In less than a decade, *The Drive* has become a top agricultural publication by consistently delivering timely, impactful stories. Supported by effective distribution channels, it has evolved into a valuable asset across print, email, digital, and video platforms.

PRODUCER ATTITUDES ON THE BEEF CHECKOFF

43%

recall seeing, reading, or hearing something about the Beef Checkoff in the past six months, up from 41% in 2023.

74%

say the Beef Checkoff has contributed to positive trends in consumer beef demand, down from 80% in 2023.

59%

trust the Beef Checkoff is being managed well, same as 2023.

Educate about beef over other proteins

72%

Educate about the benefits of beef

65%

Address misinformation by action groups

57%

IN WHAT AREAS DO PRODUCERS WANT BEEF CHECKOFF DOLLARS INVESTED?

57%

Influence consumer confidence in beef

55%

Advertise and promote beef to consumers

46%

Promote U.S. beef in foreign markets

Source: Cattlemen's Beef Board Producer Attitude Survey, Luce Research, January 2024

FY24 CONSUMER ATTITUDES & BEHAVIORS



86% of consumers say they always or often **consider taste** when **choosing a protein** for home meals.¹ (n=4,279) Since 2019, an average of **57%** of consumers have **ranked beef** as their **top choice** for **taste** over other proteins.¹ (n=36,356)



70% of consumers consider how their food is raised when **selecting a protein-based meal**. However, only **26%** are actively **altering their shopping behavior** based on sustainability claims.¹ (n=2,296), ²



52% of consumers use **recipes** at least weekly. In particular, **52%** prioritize **budget-friendly** options, **49%** consider **cooking time**, and **60%** are drawn to recipes with **appealing imagery**.³

In response to inflation,

- 37%** of consumers are **seeking deals** and **coupons** more frequently,
- 36%** are **dining out less**,
- 28%** are finding more ways to **use leftovers**, and
- 27%** are **stocking up** or **freezing** items more often.¹ (n=1,501)

Online grocery ordering has declined moderately, from



67% of consumers in 2020 to **59%** in 2024.¹ (n=7,655)

The top **3 reasons**



consumers plan to **eat beef more often** are:¹ (n=4,587)

- The taste
- Grilling more often
- It's quick and easy to prepare



Animal welfare remains the **top concern** for consumers regarding how cattle are raised, with

27% citing this as their primary issue.¹ (n=4,587)



¹ Consumer Beef Tracker (various datasets, 2019–2024) January–June 2024, n=1,501
• January–June 2024, n=1,501
• January–June 2024, n=2,296
• January–June 2024, n=4,279
• January–June 2024, n=4,587
• January 2019–June 2024, n=36,356
• January 2020–June 2024, n=7,655

² Kantar Sustainable Transformation Practice, 2024

³ Recipes Insights Survey, 2023, n=1,000

CATTLEMEN'S BEEF BOARD BY THE NUMBERS

99

members sit on the Beef Board.



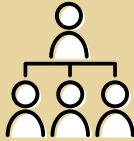
40

states are represented by Beef Board members.



10

CBB staff administer the national program.



1

government agency provides program oversight.



8

contractors received program funding in FY24.



2

subcontractors implemented program work.



2

major stakeholder meetings are held annually.



1

goal to increase beef demand domestically and globally.





Funded by the Beef Checkoff

NATIONAL BEEF CHECKOFF 2024 RETURN ON INVESTMENT & BROADER ECONOMIC IMPACT STUDIES



AN INDEPENDENT ECONOMIC ANALYSIS OF THE NATIONAL BEEF CHECKOFF PROGRAM
FOR THE MOST RECENT FIVE-YEAR PERIOD

© 2024 Cattlemen's Beef Board #061024-02



2019-2023 RETURN ON INVESTMENT STUDY

To estimate the impact of the national Beef Checkoff program, in terms of additional benefits and industry returns, a market simulation model was used to calculate an average return on investment (ROI). For this study, the average **ROI measured the incremental financial impact to producers and importers** for each \$1 invested¹ in national Beef Checkoff demand-driving activities².

WHAT WERE THE IMPACTS OF THE NATIONAL BEEF CHECKOFF ON BEEF DEMAND³ AND FOR THOSE PRODUCERS AND IMPORTERS WHO PAY INTO THE PROGRAM?

- The national Beef Checkoff had a positive and significant impact on beef demand in the U.S. compared to what it would have been in its absence. Had there not been any national Beef Checkoff demand-driving activities over the most recent five-year period (2019–2023), **total domestic beef demand WOULD HAVE BEEN 2.4 BILLION POUNDS (8.5%) LOWER** per year than actual results.

- The national Beef Checkoff had a positive and statistically significant impact on U.S. beef exports over the most recent five-year period (2019–2023). Specifically, had there not been any national Beef Checkoff program funds (along with other foreign marketing expenditures) spent on export demand-driving activities⁴, **U.S. beef export demand WOULD HAVE BEEN 372 MILLION POUNDS (11.5%) LOWER** per year than actual results in the seven major importing countries⁵ included in this study.

- Had there not been any national domestic demand-driving activities from 2019–2023, **the steer price WOULD HAVE BEEN 7.8% LOWER** per year than actual results.

- For every national Beef Checkoff program dollar invested in domestic and export demand-driving activities for the most recent five-year period (2019–2023), the program had a positive effect on beef demand, **resulting in a total financial impact of \$13.41 BACK TO PRODUCERS and IMPORTERS** who pay into the program.

This study **does not** assess the impacts of Beef Checkoff program dollars invested at the state level.



¹ The \$1 invested refers to national Beef Checkoff program dollars that were allocated to demand-driving activities from 2019–2023 by the Beef Promotion Operating Committee, a 12-member body of appointed producers and importers.

² The term "demand-driving activities" refers to national Beef Checkoff programs that influence beef demand such as promotion, education, trade servicing, and influencer activities as well as research projects.

³ Beef demand is the relationship between the price of beef and the quantity of beef purchased.

⁴ Funds expended on export demand-driving activities include national Beef Checkoff program funds as well as contractor-acquired contributions and government monies (USDA/FAS), which are referred to as "other foreign marketing expenditures" in this study.



2023 BROADER ECONOMIC IMPACT STUDY

The impact of the national Beef Checkoff on employment, labor income, value added, gross domestic product (GDP), and tax revenue creation were estimated using a **macroeconomic input-output model**. These findings offer insight into the **broader impacts of the beef industry**⁶ that are attributable to the national Beef Checkoff's demand-driving activities.

WHAT WAS THE *DIRECT EFFECT* OF THE NATIONAL BEEF CHECKOFF TO THE BEEF INDUSTRY?

The percentages for domestic beef demand (8.5%) and U.S. beef exports (11.5%) were used to calculate the national Beef Checkoff's contribution to the **incremental increase in total revenue** to the beef industry. Applying these percentages indicated that the **direct effect of the national Beef Checkoff added an incremental \$3.3 BILLION** to the beef industry in 2023. The \$3.3 billion incremental amount was achieved by **higher domestic sales volume (8.5%) and higher export volume (11.5%)** due to national Beef Checkoff domestic and export demand-driving activities.

WHAT WERE THE *INDIRECT EFFECTS* OF THE NATIONAL BEEF CHECKOFF TO THE BROADER GENERAL ECONOMY?

The direct effect of the national Beef Checkoff adding an incremental **\$3.3 BILLION** to the beef industry had **positive indirect effects** to the broader economy⁷, including:

• Increases in U.S. employment by almost **47,000 PEOPLE**.

• Increases in U.S. employment income by **\$2 BILLION**.

• Increases in total value added by **\$4.1 BILLION** in the U.S.

• Increases in U.S. GDP by nearly **\$9.5 BILLION**.



In addition, the existence of the national Beef Checkoff also **increased tax revenue** at the federal, state, and local levels. In 2023, this amounted to:

- **\$34 MILLION** in county tax revenue
- **\$205 MILLION** in state tax revenue
- **\$504 MILLION** in federal tax revenue

Grand Total: \$743 MILLION in total tax revenue.

⁵ Importing countries include Mexico, Japan, South Korea, Taiwan, Hong Kong, China, and the European Union as they collectively represent the major destinations for U.S. beef exports.

⁶ The term "beef industry" refers to producers and importers who pay into the program.

⁷ The term "broader economy" refers to the U.S. economy, which encompasses the beef industry (i.e., producers and importers), input supply industries that benefit from increased purchase of inputs and services from the beef industry, and macroeconomic outputs.



METHODOLOGY

RESEARCH PERIOD & PRINCIPAL INVESTIGATOR

The Return on Investment & Broader Economic Impact Studies were conducted by Dr. Harry Kaiser in 2024. Dr. Kaiser is the Gellert Family Professor of Applied Economics and Management at Cornell University in the Charles H. Dyson School. Dr. Kaiser has been involved in the research of commodity promotion for 40 years and has conducted over 130 economic evaluation studies of domestic and international checkoff programs in the United States, Canada, and Europe.



RETURN ON INVESTMENT STUDY

ECONOMETRIC MODELS

Econometric models were developed to filter out the effects of other demand drivers/factors (e.g., other protein prices, real disposable income, seasonal variables, etc.), which enabled the study to quantify the net impact that national Beef Checkoff demand-driving activities had on domestic and export beef demand.

Econometric models were estimated with beef demand driver/factor data observations from 2006–2023.

MARKET SIMULATION MODEL

Once estimated, the econometric models were used to develop a market simulation model, which was simulated under two scenarios: 1) baseline scenario, and 2) counterfactual scenario. The difference in beef demand between the two scenarios determined the ROI of the national Beef Checkoff for beef producers and importers.

The market simulation model utilized data observations from the most recent five-year period, 2019–2023.



BROADER ECONOMIC IMPACT STUDY

The Impact Analysis for Planning (IMPLAN) was the input-output model used to determine the benefits of the national Beef Checkoff on the broader economy. Using 2023 as the base year, the IMPLAN model measured the incremental impacts of the national Beef Checkoff on employment, labor income, value added, tax revenue, and gross domestic product (GDP).



ONLINE ACCESS

To access the full ROI and Broader Impact Studies online, scan the QR Code or visit BeefBoard.org/ROIstudy.

BEEF



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This is the official website of the Cattlemen's Beef Board and the national Beef Checkoff program. It serves as a hub for beef producers and importers, offering the latest program updates, access to *The Drive* content, meeting details, and additional valuable resources.



Resources

This page is a key section of the website, providing important information about the structure of the Beef Checkoff, including governing documents, audited financials, fiscal budgets, and annual reports.



Contractors

Discover more about the organizations currently executing national Beef Checkoff program work.



Knowledge Center

This platform provides CBB members and stakeholders with access to Beef Checkoff resources, including webinars, learning modules, and other valuable content.



Meeting Center

Beef Checkoff meetings are open to all Checkoff investors. Visit this page to access minutes from past meetings and stay informed about upcoming meetings and events.



The Drive

This collection of articles and videos showcases both current and archived stories, highlighting industry news, insights, and in-depth coverage of the Beef Checkoff program.



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