

AUTHORIZATION REQUEST FOR FY 2019

CBB Budget Category: **Foreign Marketing**

Name of Contractor: **National Cattlemen's Beef Association**

Name of Organization Subcontracting: **United States Meat Export Federation**

Start Date: **10/1/2018**

End Date: **9/30/2019**

AR OVERVIEW

AR Description:

In support of the Beef Industry Long Range Plan to drive growth in beef exports, the United States Meat Export Federation (USMEF), funded in part by the beef checkoff, organizes its international programs in global markets around the following strategic priorities:

- A) Market Access- USMEF's global staff monitor and manage the impact of government requirements, consumer issues, and non-science based regulations that limit U.S. beef exports. To maximize the impact of market access initiatives, USMEF prioritizes issues that are likely to have the greatest impact on exports and where USMEF is in the strongest position to influence.
 - B) Market Development- A key component of USMEF strategic program planning, USMEF focuses on developing demand for U.S. beef among new and existing buyers by introducing new sectors to U.S. beef and expanding the volume and range of cuts purchased by current buyers. USMEF focuses on opportunities to utilize a wide range of cuts, bringing value to an entire carcass by promoting alternative cuts and variety meat products where culturally appropriate. With the expertise of on-ground marketing directors and staff, USMEF identifies sectors with the highest potential for export growth, and ultimately designs strategic objectives unique to each market. For sustained growth and expansion, markets may require a "develop", "displace", or "defend" approach depending on a variety of factors such as market access, competitor performance, market penetration level, and future outlook.
- 1). Develop – The development of new markets for U.S. beef is a top priority for USMEF and includes identifying market potential, establishing relations with importers, and introducing buyers to U.S. suppliers. USMEF evaluates new markets based on feedback from the U.S. beef industry and market profiles such as per capita consumption, domestic production, import market share, etc. USMEF also develops new outlets for U.S. beef within more "mature" markets by penetrating new market subsectors.

- 2). Displace- As global production improves, competition among exporting countries and domestic suppliers in each market continues to intensify. USMEF works to displace competitor product and capture additional market share by promoting the unique attributes of U.S. product, focusing on safe production, marbling characteristics, grading structure, and other features to convince buyers that U.S. beef is superior to the competition.
- 3). Defend- It is essential that the U.S. beef industry never assumes that markets currently held will remain U.S.-dominated. Just as USMEF works to displace competitor products, competing suppliers are working to displace U.S. beef. Defense strategies, especially in high-stake markets where high volumes of U.S. beef are exported or where U.S. beef holds significant market share, are employed to hold market share stable against the aggressive tactics of competitors.

In developing programs to achieve strategic objectives, USMEF breaks each market into four sectors roughly corresponding to the distribution flow of product, and reflective of the level of market penetration of U.S. beef as follows: Trade (importers, distributors, processors), HRI (Hotel, Restaurant, and Institution), Retail, and Consumer. To further create opportunities for U.S. beef in each market, each sector is then divided into smaller subsectors characteristic of each market. For example, HRI may be divided into family-style eateries, BBQ chains, white tablecloth restaurants, local cuisine, fast-food, etc. As consumer trends change, these subsectors may evolve, presenting opportunities for U.S. beef export growth.

USMEF tactics and programs designed to achieve strategic objectives are similar in many markets; however, the implementation, target audience, and specific messages delivered through these initiatives are characteristic of each market. Examples of USMEF Market Access and Market Development activities are listed below:

Trade Servicing: Includes ongoing activities conducted in the market to build and maintain relationships, gather and disseminate relevant information between the market and the U.S. beef industry, connect buyers and sellers, and communicate the U.S. industry's commitment to target accounts.

Trade Shows: USMEF attends relevant trade shows to bring buyers and sellers together with the opportunity to discuss business needs, reinforce relationships, exchange information about trends, and demonstrate current and new products. Trade shows are a primary tool used to generate interest in U.S. product and engage new and existing buyers. Exhibitions often feature a U.S. or meat pavilion in which USMEF and U.S. beef suppliers have booths for displaying product. Shows may range from large-scale international events, to smaller events focused on specific sectors or regions, as well as very targeted importer-hosted shows.

Seminars/Training/Cutting Demonstrations: Targeted, and customized seminars are used to introduce U.S. beef to new customers, to establish trust in U.S. product with existing buyers, and to showcase the range and versatility of available U.S. beef cuts in each market. USMEF recognizes that education at all

levels, from importers/distributors to retail meat department staff, is a key cornerstone of market development. Seminars may include hands-on cutting demonstrations, cooking demonstrations, menu development trainings, etc. These activities may be customized for company-specific training and may even be directed towards the buyers of a specific importer/distributor as a support mechanism to generate more downstream sales.

Trade Teams: USMEF hosts numerous international trade teams of importers/distributors, decision-makers from targeted foodservice and retail companies, and media influencers to give participants a thorough and interactive overview of the U.S. beef industry. Demonstrating U.S. beef production techniques, range of products available, safety and inspection procedures, and foodservice/retail trends, USMEF trade teams are an important means to facilitate business relationships between buyers and sellers, and a primary opportunity to showcase the superiority of U.S. product.

Communications: USMEF may utilize traditional or online communications to distribute information about U.S. beef among targeted buyers and consumers. Using print material such as newspapers, advertisements, magazines, and even online materials such as social media posts, articles, and video content, these activities can help introduce new products, provide information about where to purchase U.S. beef, generate goodwill among consumers, and promote the quality and safety of the product.

Promotions: Supporting retailers and foodservice operators, USMEF utilizes promotions in conjunction with a full range of other activities (i.e. training, communications) to develop long-term sales of U.S. beef. Promotions may take many forms, including in-store tastings, menu features, events/contests/etc. Results are often used to communicate the value in U.S. beef to first-time users or to encourage buyers to expand the portfolio of U.S. beef products on their menu or on their shelves. In addition, promotions increase buyer familiarity with U.S. product, and deliver messages about the quality, taste, safety, and versatility of U.S. beef directly to targeted consumers.

Issue Monitoring, Analysis, and Reporting: As part of the Market Access initiative, USMEF is committed to monitoring U.S. beef access in international markets. USMEF frequently updates U.S. exporters, industry trade associations, and government agencies with information and analysis on import policies, requirements, and changes that have the potential to restrict U.S. beef exports, including traceability requirements and competitor programs. Attendance at conferences, formal communications, and informal meetings are examples of activities where market access information may be gathered and shared.

Government and External Relations: USMEF communicates information about U.S. production practices, U.S. meat safety systems, U.S. export requirements, and science-based assurances about the U.S. industry to foreign government authorities, opinion leaders, the media, the trade, and the general public in international markets. Specific activities may include hosting seminars or teams,

distribution of educational material, relationship-building, public relations, and research, and may include in-market port inspection personnel.

Technical Support: USMEF provides details to the trade and local authorities on U.S. export specifications, certification procedures, safety inspection measures and quality assurance programs. Specific activities may include conducting seminars, distributing educational material, and hosting teams.

Cost for this AR

Source of Funding	Direct Costs	Implementation	Total
CBB/BPOC Funding Request:	\$5,811,600	\$2,488,400	\$8,300,000
Federation of SBCs Funding Request: <i>(Informational Only)</i>	\$260,800	\$111,600	\$372,400
Other Funding Source(s): <i>(Informational Only)</i>	\$3,584,795	\$0	\$3,584,795
Total Cost	\$9,657,195	\$2,600,000	\$12,257,195

Long Range Plan Core Strategies Addressed by this AR *(Check all that apply)*

Grow Beef Exports	Consumer Trust	Protect & Enhance	Beef's Value Proposition
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Digital properties and target audience(s) addressed by this AR:

ASEAN – Facebook (Trade, HRI, Consumer)

China/HK – Websites, WeChat Weibo, Facebook (Trade, HRI, Consumer)

Europe- Website, Facebook, Twitter, YouTube, Instagram (Trade, HRI, Consumer)

Japan- Websites, Facebook, Twitter, YouTube, Instagram, Mobile Apps (Trade, Consumer)

Korea- Websites, Facebook, Instagram, Naver Post, Mobile Apps (Trade, HRI, Consumer)

Mexico- Websites, Twitter, Facebook, YouTube, Instagram (Trade, HRI, Retail, Consumer)

South America- Website, Facebook, Instagram (Trade, HRI, Consumer)

Taiwan – Websites, Facebook, YouTube (Trade, HRI, Retail, Consumer)

PROGRAM INFORMATION FOR THIS AR**Tactic A****Tactic Name:** ASEAN – Market Development**Tactic Description:**

Market Profiles:

	Indonesia	Philippines
Per Capita Beef Consumption	3.0 kg	3.7 kg
U.S. Share of Total Beef/BVM Import Market	9%	7.5%
Other Beef/BVM Suppliers & Market Shares	Australia 54%	India 31%
	India 28%	Australia 25%
	New Zealand 8.5%	EU-28 21.5%
Domestic Self Sufficiency	62%	54%
U.S. Beef Exports (not including variety meat)	6,426 mt	9,305 mt
U.S. Beef Variety Meat (BVM) Exports	7,322 mt	3,599 mt
Top Imported U.S. Beef Cuts: middle meats, rib and chuck items, some thin meats		
Top Imported U.S. BVM Items: livers, kidneys, hearts, tongue, tripe, tendon		

In 2017, exports of U.S. beef plus variety meat to the ASEAN region were up 37 percent in volume to 40,954 mt, while value was up 34 percent to nearly \$211 million. Exports to Indonesia, Philippines, and Vietnam, the three leading export markets for U.S. beef plus variety meats in the region, were all higher in 2017. Although the smallest of the three leading markets, exports to Vietnam led growth in 2017 with volume up 62 percent to 10,066 mt, and value up 50 percent to over \$60.25 million as Paraguay, the EU, Australia, and Brazil all lost significant market share according to global export data. U.S. beef plus variety meat exports to Indonesia were up 27 percent (13,748 mt), and exports to Philippines, the second largest importer of U.S. beef plus variety meats in the region, were also up 27 percent in volume (12,904 mt). Access for bone-in beef to Thailand was granted in late 2017.

Export Forecasts		
2018	47,100 mt	\$239.9 million
2019	47,515 mt	\$244.5 million

USMEF ASEAN Market Development Strategies:

Foodservice Demand	<ul style="list-style-type: none"> • Traditional street food like bakso balls (Indonesian meatball) are still popular, and lower quality Indian buffalo, Australian grass-fed, and Spanish beef compete in this segment. • Increasing tourism throughout the region is spurring growth in upscale restaurants and subsequent usage of high quality U.S. beef. • Chefs are willing to use alternative cuts to maintain profitability without sacrificing quality. • Growing popularity of Japanese and Korean restaurants presents opportunities for U.S. beef cuts commonly used in yakiniku and other notably ethnic cuisines from other Asian markets. • Consumers are broadening their tastes and seek menu diversity while a growing middle class is more willing to spend on high-quality menu items. • International restaurant chains are expanding into this region and are serving more beef.
<i>Strategic Objective</i>	<p>Introduce HRI buyers to U.S. secondary cuts such as hanging tender, short plate, heel meat and rib fingers that only require simple preparation but present a higher perceived value and menu variety, while reinforcing the value in U.S. beef.</p>
<i>Tactical Response</i>	<p>Conduct seminars and other activities to teach foodservice end-users about the profitability of underutilized U.S. beef cuts, demonstrate innovative cooking options outside traditional recipes, and show demonstrated successes of U.S. beef secondary cuts in Japanese and Korean cuisines.</p>

Retail Sector Modernization	<ul style="list-style-type: none"> • Traditional markets are still very prevalent throughout the region, selling low quality beef options. • The retail sector across the region is transitioning to modern supermarkets, though most consumers are not very knowledgeable about frozen meat. • Expansion of foreign retailers familiar with U.S. beef such as Aeon (Japan) and Lottemart (Korea) present opportunities to further penetrate the retail sector. • Consumers demonstrate a willingness to pay more for imported beef products, especially the growing middle class as food safety becomes a top priority. • Some importers are adding cutting/processing facilities to their operations to produce retail tray-pack items for easy inventory replenishment. • Traditional grocery retailers are starting to move into the ecommerce market, reflecting consumer preferences for convenience.
<i>Strategic Objective</i>	<p>Work with distributors to provide merchandising assistance to help retailers effectively handle and promote U.S. beef (e.g., make frozen meat and the freezer case more attractive).</p>

<i>Tactical Response</i>	Team up with the trade to enhance U.S. beef's retail presence through more point of sale activities, both in-store and online, including cooking/tasting demos, with specific tactics customized for each retailer.
CVS & QSR Growth	<ul style="list-style-type: none"> • Convenience stores are the fastest growing food outlet in the region. • Convenience stores and quick-serve restaurants are looking to source lower-cost cuts. • Similar to other Asian markets, convenience stores continue to establish a presence in the region, creating opportunities for ready-made fresh products. • Price increases and supply challenges are necessitating modifications, including different grades, cuts or preparation methods for quick serve restaurants.
<i>Strategic Objective</i>	Demonstrate how U.S. beef items such as short plate, cow rib roll and beef loin tail—with proper handling and treatment—can produce an excellent product for quick preparation.
<i>Tactical Response</i>	Develop specialized training on incorporating quality U.S. beef alternative items into convenience store meals.

Other Key Initiatives

- Explore the untapped market opportunities in Laos, Cambodia, and Myanmar with initial trade servicing to gather information on current market needs.
- Further develop HRI opportunities for U.S. bone-in beef in Thailand, where market access was granted in late 2017 and buyers are still unfamiliar with U.S. bone-in cuts.
- Respond to consumer concerns regarding food safety by positioning U.S. beef as a safe, reliable, and consistent protein source.
- Emphasize the benefits of grain-fed U.S. alternative cuts (vs. grass-fed traditional cuts from other sources) in this developing region.
- Educate processors on using U.S. beef variety meat such as hearts and livers as standard input material.
- Explore expanded use of sirloin and round cuts, and increase the market for >30-month and no-roll items.
- Target key food distributors, chefs, purchasing managers and restaurant owners to address company-specific opportunities and challenges.
- Continue to focus on new opportunities, including expanding the marketing reach to new HRI and retail subsectors in targeted markets, and continue to support new outlets for U.S. beef with merchandising suggestions, POS material, etc.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- 85% of targeted trade accounts understand the profit potential of and have a favorable attitude towards U.S. beef based on information provided by USMEF.
- 83% of targeted HRI accounts understand the unique quality and profit potential of U.S. beef compared to competing products based on information provided by USMEF.

- 77% of targeted HRI accounts regularly feature and promote U.S. beef on their menus.
- 100% of targeted retail accounts understand the quality attributes of U.S. beef based on information provided by USMEF.
- 100% of targeted retail accounts regularly stock U.S. beef.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<ul style="list-style-type: none"> ■ Adopt traceability systems ■ Increase market access ■ Promote unique attributes of U.S. beef 	<ul style="list-style-type: none"> <input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety ■ Protect beef's image <input type="checkbox"/> Engage beef advocates 	<ul style="list-style-type: none"> <input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations ■ Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity 	<ul style="list-style-type: none"> <input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability ■ Research & communicate beef's nutritional benefits ■ Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic B

Tactic Name: ASEAN – Market Access

Tactic Description:

In the ASEAN, noteworthy market access issues for U.S. beef include the following:

- A) A ban on certain pathogen reduction treatments, registration requirements for processed beef and beef offal, and EV requirements for beef from imported Canadian cattle;
- B) Vietnam's non-transparent import requirements for "white offal";
- C) The Philippines non-transparent reference pricing system at custom clearance;
- D) Indonesia's requirement for on-site audits for plant approval; and
- E) Other non-science based barriers throughout the region.

To mitigate the effects of these market access issues and improve market access conditions for U.S. beef, USMEF will work closely with U.S. industry organizations to contribute to and support initiatives to eliminate trade-restrictive policies and requirements in the ASEAN region. This includes educating government decisions makers about U.S. production standards, relying on science-based technical material to drive home the message that U.S. beef is safe and reliable.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- USMEF will collect and disseminate to government personnel stakeholder feedback regarding the affects these market access issues have on export growth to help prioritize elimination of these policies.
- USMEF will facilitate communication between appropriate government officials, offering science-based evidence on the safety of U.S. beef, and will contribute to U.S. government initiatives to eliminate trade-restrictive policies.
- At least 90% of USMEF members will report that they receive the information they need from USMEF related to market access issues.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input checked="" type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input type="checkbox"/> Research & communicate beef's nutritional benefits <input type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic C

Tactic Name: Caribbean- Market Development

Tactic Description:

Market Profiles:

	Bahamas	Jamaica
Per Capita Beef Consumption	n/a	n/a
U.S. Share of Total Beef/BVM Import Market	76%	60%
Other Beef/BVM Suppliers & Market Shares	Brazil 14%	Australia 14%%
	Argentina 5.5%	Brazil 11%
	EU-28 4%	Costa Rica 9%
Domestic Self Sufficiency	n/a	n/a
U.S. Beef Exports (not including variety meat)	2,988 mt	1,687 mt
U.S. Beef Variety Meat (BVM) Exports	36 mt	3, 299 mt
Top Imported U.S. Beef Cuts: top sirloin, inside round, strip loin, rib eye, ground beef, tenderloin		
Top Imported U.S. BVM Items: liver, kidney, heart, feet, oxtail		

In 2017, three notable hurricanes- Harvey, Irma, and Maria- landed in the Caribbean, destroying several islands and causing over \$250 billion in damages. While some islands, such as Barbuda and the U.S. Virgin Islands, were destroyed, others remained well in-tact with only minor repairs needed. The region is still recovering, but exports of U.S. red meats continued to islands throughout the remainder of 2017.

In 2017 exports of U.S. beef plus variety meat to the Caribbean region were up nearly 1.5 percent to 17,542 mt with value down 5.5 percent to \$105 million. According to global export data, which differs slightly from U.S. export data, the U.S. was again the top supplier of beef and variety meats to the Caribbean region, accounting for 59 percent of exports to the Caribbean in 2017, up from 50 percent in 2016, although global beef and beef variety meat exports to the region were down 2,702 mt. Jamaica (4,987 mt, up 5 percent) and the Bahamas (3,023 mt, down 8 percent) were the top two volume destinations in the region, reaching \$16.6 million and \$21.9 million, respectively.

Export Forecasts		
2018	17,787 mt	\$110.6 million
2019	18,432 mt	\$115.1 million

USMEF Caribbean Market Development Strategies:

Keep U.S. beef top-of-mind among buyers in the Caribbean by distinguishing its quality, consistency, and eating experience in order to a) Defend market share against the competition and other alternative protein sources and b) Further develop demand for a wide range of items, especially those targeted for high-end foodservice, and BBQ concepts.

Growing Foodservice Sector	<ul style="list-style-type: none"> • Some islands are rebuilding after several hurricanes in 2017, and foodservice outlets are servicing the construction crews brought in for repairs. • Recovered islands are keeping pace with tourism demand, fueling the foodservice sector. • Restaurateurs are seeking affordable cuts while retaining well-marbled characteristics. There is also growing interest in portion-controlled cuts (i.e. pre-cut steak-ready) that reduce labor and excess trim costs in restaurant kitchens. • Foodservice operators express a need to differentiate, presenting potential for U.S. beef alternative cuts. • Alternative cuts also present an opportunity for resorts to add an affordable protein to menus developed for staff. • HRI buyers have inquired about ways to use high quality beef to improve local burgers.
<i>Strategic Objective</i>	Maintain a presence for U.S. beef on restaurant menus by illustrating the cost benefits of purchasing underutilized U.S. beef cuts at the highest possible/affordable quality grade.
<i>Tactical Response</i>	Focus on assisting foodservice operators recover and grow business with in-house chef trainings promoting value cuts such as bottom sirloin flap/ball tip/tri-tip, brisket, chuck eye roll, shoulder clod and top sirloin, while reiterating the impact of quality and consistency on profitability.

Transitioning Retail	<ul style="list-style-type: none"> • Retail outlets continue to transition from frozen to chilled beef products. • Retailers face issues such as shrink, inconsistent cold chain infrastructure, and high employee turnover. • There is new demand for smaller case-ready cuts with >21 days shelf life. • Demand for high-quality value-added products such as dry-aged beef, all-natural, or organic beef is rising in the retail marketplace. • Anti-U.S. sentiments linger with local populations presenting a challenge for country of origin labelling at the retail level.
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<i>Strategic Objective</i>	Work with retail chains to educate employees on the value/quality benefits of U.S. chilled beef, train staff on proper handling and marketing of products, and support the launch and merchandising of value-added or niche high-quality items.
<i>Tactical Response</i>	Introduce a range of chilled cuts and demonstrate correct handling, storage, and merchandising procedures to better display and promote U.S. beef.

New Cooking Styles	<ul style="list-style-type: none"> • Locals predominantly use slow cooking methods and stew recipes for beef due to the availability of low-quality beef. • Increased availability of high quality beef has spurred interest in other cooking techniques like grilling and barbecuing, although BBQ is still excluded from many culinary training programs. • Retailers are seeking to introduce new items suitable for the grill.
<i>Strategic Objective</i>	Demonstrate a variety of grilling techniques to chefs, retailers, and their customers to increase sales of appropriate mainstream and lesser-known U.S. beef cuts suitable for grilling and move consumers away from just stewing meat.
<i>Tactical Response</i>	Develop educational materials for the meat case that include recipes promoting “Great on the Grill” concepts and provide training for meat department staff on promoting cuts for grilling. Encourage integration of formal barbecue courses into local culinary curriculums.

Other Key Initiatives

- Facilitate communication between potential buyers and U.S. suppliers via participation in events such as USMEF’s Latin American Product Showcase.
- Enhance buyer understanding of the U.S. beef grading system and highlight the value/price relationship between quality grades and affordable cuts.
- Present the maximum SKUs (individual items) from each cut and identify ways distributors can work with their customers to broaden menu and retail offerings.
- Demonstrate the profit potential of case-ready and portion control products (e.g. strip, ribeye, top sirloin, burgers and flat iron) to retail and HRI accounts.
- Introduce U.S. exporters to buyers looking for chilled and portion control beef cuts.
- Educate chefs and wait staff on the attributes of U.S. beef and new cooking methods (e.g. low & slow BBQ or sous vide) and support targeted restaurant promotional efforts.
- Work with retailers to review their fabrication and storage facilities, meat case setup, pricing, and product labeling and provide recommendations for improvement in order to maintain the integrity of U.S. beef products and increase sales.
- Support the development of a modern cold chain and educate buyers on proper handling techniques.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- 95% of targeted importers and distributors understand the supply, quality, and value relationships in U.S. beef products based on information provided by USMEF.
- 80% of targeted HRI distributors promote new ways to use popular cuts or an alternative cut of U.S. beef to their customers.
- 100% of targeted retailers understand proper cold chain management, handling, and merchandising of U.S. beef.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input checked="" type="checkbox"/> Adopt traceability systems <input checked="" type="checkbox"/> Increase market access <input checked="" type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input checked="" type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input checked="" type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input checked="" type="checkbox"/> Research & communicate beef's nutritional benefits <input checked="" type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic D

Tactic Name: Caribbean – Market Access

Tactic Description:

In the Caribbean, noteworthy market access issues for U.S. beef include the following:

A) Jamaica's excessively high import duties on U.S. beef at 86%.

USMEF will work closely with U.S. industry organizations to contribute to and support initiatives to eliminate trade-restrictive policies and requirements in the Caribbean

region and keep the U.S. industry informed on critical changes in local government regulations and emerging issues in the region.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- USMEF will contribute to government initiatives to eliminate trade restrictive policies using in-market expertise.
- USMEF will facilitate communication between appropriate government officials, offering science-based evidence on the safety of U.S. beef, and will contribute to U.S. government initiatives to eliminate trade-restrictive policies.
- At least 90% of USMEF members will report that they receive the information they need from USMEF related to market access issues.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input checked="" type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input type="checkbox"/> Research & communicate beef's nutritional benefits <input type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic E

Tactic Name: Central America & Dominican Republic – Market Development

Tactic Description:

Market Profiles:

	Dominican Republic	Guatemala
Per Capita Beef Consumption	7.0 kg	5.7 kg
U.S. Share of Total Beef/BVM Import Market	98%	37%
Other Beef/BVM Suppliers & Market Shares	EU-28 2%	Nicaragua 49%
		Costa Rica 7%
		Honduras 4%
Domestic Self Sufficiency	88%	83%
U.S. Beef Exports (not including variety meat)	6,076 mt	4,964 mt
U.S. Beef Variety Meat (BVM) Exports *	284 mt	350 mt
Top Imported U.S. Beef Cuts: strip loin, outside skirt, coulotte, flatiron, ranch cut, round, clod, gooseneck, inside skirt		
Top Imported U.S. BVM Items: liver, heart, tongue, tripe		

In 2017, exports of U.S. beef plus variety meat to the Central America + Dominican Republic region were record large, increasing 2 percent to 19,248 mt in volume, but down in value nearly 3 percent to \$125 million. Exports were record large to Guatemala (5,314 mt, up 24 percent), El Salvador (1,600 mt, up 1 percent), and the Dominican Republic (6,360 mt, up 4 percent), but were lower to Honduras (2,080 mt, down 3 percent), and Panama (1,491 mt, down 32 percent).

Export Forecasts		
2018	19,304 mt	\$125.3 million
2019	21,128 mt	\$141.8 million

USMEF Central America & Dominican Republic Market Development Strategies:
 Educate the trade and end-users across sectors on the quality, consistency, and profit potential of U.S. beef, while introducing value cuts and their suppliers to buyers throughout the region to continue developing the market.

<p>Favorable Access</p>	<ul style="list-style-type: none"> • The U.S.-Panama FTA presents increased export opportunities for both top-graded cuts and variety meats. • Growth for a range of items and reduced tariffs continue in Guatemala, Honduras, El Salvador, and Nicaragua with the CAFTA-DR FTA. Select Grade beef is becoming more accessible as tariffs are reduced, although USDA Select Grade is competing with domestic beef. • Lack of domestic beef products due to export to Mexico creates opportunities for U.S. beef penetration, although Nicaragua is a growing supplier across the region.
<p><i>Strategic Objective</i></p>	<p>Leverage the benefits of the region's FTAs by identifying niche HRI and retail segments for high-grade U.S. beef, identify retailers willing to bring in Select grade beef to build consumer familiarity with the product, and increase demand in segments willing to utilize variety meats.</p>
<p><i>Tactical Response</i></p>	<p>Develop region-wide programs with large regional retailers such as Walmart and local retail chains and continue to focus on expanding new opportunities in new sectors, especially for Select grade beef.</p>
<p>Opportunities in Diverse Retail Segments</p>	<ul style="list-style-type: none"> • Traditional wet markets, small meat boutiques, and modern supermarkets all compete in this region, with the majority of consumers in each country shopping at different types of retail. • Opportunities exist for diverse cuts, especially variety meats, in wet markets. • Retailers are starting to integrate USDA Select Grade beef to diversify from domestic. • Retailers and consumers are still relatively unfamiliar with U.S. beef and need additional instruction on handling, merchandising, cooking, etc. • Consumers are generally accustomed to low quality domestic beef and need training on new ways to cook and utilize U.S. beef so as to not overcook and jeopardize the eating experience.

<i>Strategic Objective</i>	Educate buyers on the U.S. beef products available to expand their portfolios, and train them on proper meat merchandising techniques and cold chain practices for optimal yields.
<i>Tactical Response</i>	Offer hands-on trainings for retailers via a Continuous Improvement Program to optimize product display; educate all buyers, including end-consumers, on cutting and cooking U.S. beef such as grill concepts; continue to enhance joint partnerships to establish trust with U.S. beef by capitalizing on relationships with familiar brands; and demonstrate the quality in U.S. Select grade beef over domestic beef.

Foodservice Growth	<ul style="list-style-type: none"> • With more U.S. beef in the region, new restaurants are adding value cuts such as the clod and chuck tender. • Consumers are getting a taste of flavorful U.S. beef cooked “medium,” rather than tough local beef cooked medium-well and marinated. • Costa Rica and Panama have highest per capita incomes, where consumers are more likely to break traditional eating habits and dine out more often. • Growing tourism in the Dominican Republic presents opportunities for U.S. beef at resorts and hotels for guests, and also for staff meals.
<i>Strategic Objective</i>	Assist leading importers and distributors in sourcing additional U.S. beef cuts such as inside round and introduce buyers across sectors to value cuts while teaching appropriate preparation methods.
<i>Tactical Response</i>	Promote value cuts (e.g. top blade “California cut,” sliced shoulder clod “Texas steak,” arm roast, and petite tender) to new HRI segments, and provide support with recipe development.

Other Key Initiatives

- Focus on building relationships with integrated importers, processors, and distributors to maximize efficiency in training and create the most impact in downstream sectors.
- Introduce the trade and their downstream customers to lower-cost alternative cuts (e.g., chuck tender, shoulder clod, top sirloin butt) to address relatively high beef prices.
- Further advance channel development in the region and build demand by broadening the reach of educational programs to more countries and into more locally owned supermarket and meat shop chains.
- Work with processors in the Dominican Republic to target the “local” population with more affordable, processed products.

Measurable Objectives (List at least three outcome-based objectives for this tactic):

- 70% of targeted importers/distributors consistently source and successfully promote U.S. beef to their downstream customers.

- 75% of targeted HRI accounts understand the quality and profit potential of U.S. beef based on information provided by USMEF.
- 83% of targeted retailers consistently incorporate suggested merchandising methods to promote the quality attributes of U.S. beef.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
---------------------	---------------------	------------------------------------	--------------------------

- | | | | |
|---|---|--|--|
| <input type="checkbox"/> Adopt traceability systems
<input checked="" type="checkbox"/> Increase market access
<input checked="" type="checkbox"/> Promote unique attributes of U.S. beef | <input type="checkbox"/> Ensure antibiotic stewardship
<input type="checkbox"/> Certify & verify production practices
<input type="checkbox"/> Ensure beef safety
<input checked="" type="checkbox"/> Protect beef's image
<input type="checkbox"/> Engage beef advocates | <input type="checkbox"/> Research & innovate new production tech.
<input type="checkbox"/> Ensure beef's inclusion in dietary recommendations
<input checked="" type="checkbox"/> Motivate producers & stakeholders to engage
<input type="checkbox"/> Develop crises management plans
<input type="checkbox"/> Attract, develop & enable the next generation
<input type="checkbox"/> Defend beef's product identity | <input type="checkbox"/> Revolutionize beef marketing & merchandising
<input type="checkbox"/> Measure & improve sustainability
<input checked="" type="checkbox"/> Research & communicate beef's nutritional benefits
<input checked="" type="checkbox"/> Connect & comm. with consumers
<input type="checkbox"/> Improve product & production efficiency |
|---|---|--|--|

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic F

Tactic Name: Central America & Dominican Republic– Market Access

Tactic Description:

In Central America, noteworthy market access issues for U.S. beef include the following:

- A) Some countries do not allow for frozen meat to be thawed for sale at retail; and
- B) Bilingual and other challenging label requirements are inconsistent in this region.

USMEF will focus on building alliances with importers, researchers and others, encouraging them to lobby their governments to drop unreasonable restrictions on beef imports from the U.S.; educating government decision makers about the safety of U.S. beef and the ability to thaw frozen product; and working with U.S. and regional government agencies to resolve trade-restrictive issues.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- USMEF will present scientific evidence on the safety of U.S. beef to the region’s importers, researchers & decision makers.
- USMEF will work with the region’s key government officials to provide information about the U.S. beef industry and facilitate communication between government personnel and industry stakeholders.
- 90% of USMEF members will report that they receive the information they need from USMEF related to market access issues.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
---------------------	---------------------	------------------------------------	--------------------------

- | | | | |
|--|--|---|--|
| <input type="checkbox"/> Adopt traceability systems
<input checked="" type="checkbox"/> Increase market access
<input type="checkbox"/> Promote unique attributes of U.S. beef | <input type="checkbox"/> Ensure antibiotic stewardship
<input type="checkbox"/> Certify & verify production practices
<input type="checkbox"/> Ensure beef safety
<input type="checkbox"/> Protect beef's image
<input type="checkbox"/> Engage beef advocates | <input type="checkbox"/> Research & innovate new production tech.
<input type="checkbox"/> Ensure beef's inclusion in dietary recommendations
<input type="checkbox"/> Motivate producers & stakeholders to engage
<input type="checkbox"/> Develop crises management plans
<input type="checkbox"/> Attract, develop & enable the next generation
<input type="checkbox"/> Defend beef's product identity | <input type="checkbox"/> Revolutionize beef marketing & merchandising
<input type="checkbox"/> Measure & improve sustainability
<input type="checkbox"/> Research & communicate beef's nutritional benefits
<input type="checkbox"/> Connect & comm. with consumers
<input type="checkbox"/> Improve product & production efficiency |
|--|--|---|--|

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic G

Tactic Name: China/ Hong Kong- Market Development

Tactic Description:

Market Profiles:

	China	Hong Kong
Per Capita Beef Consumption	5.7 kg	23.3 kg
U.S. Share of Total Beef/BVM Import Market	<1%	18%
Other Beef/BVM Suppliers & Market Shares	Uruguay 29%	Brazil 52%
	Brazil 27.5%	Argentina 4.5%
	Australia 17%	Australia 4.5%
Domestic Self Sufficiency	71%	1%
U.S. Beef Exports (not including variety meat)	2,981 mt	116,277 mt
U.S. Beef Variety Meat (BVM) Exports	39 mt	14,449 mt
Top Imported U.S. Beef Cuts: middle meats, boneless/bone-in short rib, chuck short rib, short plate, chuck roll		
Top Imported U.S. BVM Items: omassum, backstrap, pizzle, tripe, tendon, diaphragm, oxtail, tongue, inside skirt, outside skirt, feet		

Demand for U.S. beef and variety meat in Hong Kong rebounded after a slow start to post a strong performance in 2017, increasing 16 percent in volume (130,726 mt) and 29 percent in value (\$884.1 million) over 2016 export levels. After China's mid-year lifting of its ban on U.S. beef, exports to China totaled 3,020 mt valued at nearly \$31 million. While eligible supplies remain limited due to China's import restrictions, the market holds significant growth potential and is already one of the highest value markets for U.S. beef on a per-pound basis.

Export Forecasts**

****Note, forecasts are not reflective of damages to exports due to July 6, 2018 retaliatory tariffs.**

2018	140,000 mt	\$1.023 billion
2019	184,512 mt	\$1.33 billion

USMEF China/Hong Kong Market Development Strategies:

- A) Build customer loyalty by educating buyers about U.S. beef safety/inspection systems, unique production capabilities, quality, and profitability; B) Create

demand in untapped segments in the China/Hong Kong region and reestablish distribution channels in China, focusing on a broad range of cuts and specifications to ensure that U.S. beef remains affordable for a growing set of buyers.

<p style="text-align: center;">China Market Reopening</p>	<ul style="list-style-type: none"> • In June 2017, mainland China reopened to U.S. beef, with online and offline retailers such as Womai, Sam's Club, and a few high-end shops immediately selling U.S. beef. • Retaliatory tariffs on U.S. beef have raised the duties from 12% to 37%, with the additional 25% duty implemented July 6, 2018. • China's middle class now includes 430 million people, yet overall per capita beef consumption is growing. • As the middle class continues to grow and spending power increases, high quality grain-fed beef, including chilled beef, will become more popular. • Unique Chinese import conditions, including cattle traceability and zero hormone and ractopamine residue tolerances, result in higher cost U.S. beef and pressure on exporters to send full sets. • Expanded U.S. beef access in Hong Kong and Macau, and firm foodservice markets, has boosted exports of a wider range of U.S. beef products. In addition, some buyers in Hong Kong purchase product for mainland China. • Grain-fed beef imported directly is generally distributed in Tier 1 & Tier 2 cities. • Bilateral trade friction and the threat of additional tariffs is limiting interest in U.S. beef as it is deemed risky.
<p><i>Strategic Objective</i></p>	<p>Increase buyer knowledge on the safety, quality and availability of U.S. beef to build awareness, and reestablish relationships.</p>
<p><i>Tactical Response</i></p>	<p>Create customized, hands-on training for both retail and HRI segments to renew buyer knowledge of U.S. beef, highlighting the affordability and versatility of alternative cuts, which helps distribute the additional costs of producing beef for China across more cuts.</p>
<p style="text-align: center;">Foodservice Expansion</p>	<ul style="list-style-type: none"> • Grain-fed U.S. beef offers foodservice operators an opportunity to expand and differentiate menus, although training is required on U.S. beef's attributes and potential profitability vis-à-vis beef from competing suppliers. • Foodservice users of U.S. beef range from small local restaurants to large chains, including quick service operations. • Grain-fed beef demand is increasing rapidly, led by the proliferation of hot-pot and Korean barbecue chains, and western-style steak houses throughout China and Hong Kong. • Other beef concepts are growing (e.g. beef bars) as consumption increases and the overall foodservice sector expands. • The variety of restaurants in Hong Kong presents opportunity for diverse beef cuts to be marketed including established Asian cuts such

	<p>as short ribs, short plate, chuck eye roll, but also new items such as sirloin and clod meat. The latter are important as traditional Asian cuts reach record prices.</p> <ul style="list-style-type: none"> • China's foodservice sector is the main outlet for imported beef, as restaurant chains are building more centralized kitchens, improving food safety, and offering better value.
<i>Strategic Objective</i>	Introduce and promote the adoption of not only traditional cuts, but also new items including secondary cuts from the chuck, rib, plate and round for casual and family-style dining in Hong Kong. Encourage U.S. beef usage across all cuts, by targeting foodservice accounts in China.
<i>Tactical Response</i>	Provide educational and promotional support, including hands-on chef trainings and cutting demonstrations, to potential end-users of U.S. beef with an emphasis on fast food, family-style, western and ethnic dining sectors. Include importers and distributors in such sessions.
Diverse Retail Sectors	<ul style="list-style-type: none"> • Retail in mainland China is still relatively fragmented, with mom and pop shops and wet markets dominating the retail sector. • Sales of imported beef in traditional supermarkets are growing in the double digits annually. • Fierce competition among large retailers has led to exclusive beef store brands. • Chain retail store growth has slowed as e-commerce has taken sales away from brick and mortar operations. However, e-commerce companies are expanding into the traditional retail environment. • Online sales of fresh foods, including meat, is still a small percentage of total fresh food retail sales, but is still growing as consumers demand more convenience. • Retailers are allocating more space to portioned, case-ready packaged products. • Convenience items now include deli meats and ready-to-use frozen meat packs for hot pot. Overall, this segment is in its nascent stage.
<i>Strategic Objective</i>	Explore new lower-cost chilled U.S. beef cuts with mass retail chains in Hong Kong, while focusing on training for new U.S. beef users in mainland China. Work with distributors to promote portion-controlled U.S. beef items- chilled and frozen- in both China and Hong Kong.
<i>Tactical Response</i>	Develop recipes and merchandising ideas for new cuts at retail and introduce value-added convenience items including U.S. beef pre-packaged products, while developing customized training opportunities for both online and offline retailers.
Food Safety & Consumer Perception	<ul style="list-style-type: none"> • Consumers are increasingly concerned with and aware of food safety issues, and many consumers are turning to natural and "organic" for increased assurance. • Concerns over BSE continue to linger among the consumer population in mainland China.
<i>Strategic Objective</i>	Build awareness of U.S. beef production, processing, and inspection procedures, highlighting the safety and consistency in U.S. beef.

<i>Tactical Response</i>	Develop educational POS materials to increase visibility of U.S. beef's safety message, and utilize popular bloggers, social media influencers, and video content to revive consumer trust in U.S. beef.
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Other Key Initiatives

- Help match and facilitate communication between U.S. beef suppliers and buyers and share Chinese market needs gathered from interaction with the USMEF Meat Trader's Club with the U.S. beef industry.
- Educate the trade on applications for new-to-market underutilized cuts in Hong Kong, Macau and main land China.
- In addition to working with well-known importers, also drive further market penetration through the development of promising startup companies eager to expand their share of the imported U.S. beef market.
- Build a following for U.S. beef integrity and culture with restaurateurs and lifestyle media by hosting consumer-oriented events including BBQs, cooking demos, cooking classes, etc.
- Utilize mass/social media to educate consumers on both high-end and value U.S. beef options, and inform them about ongoing U.S. beef promotions, events, and activities.
- In China, develop more e-commerce channels and promotions to sell U.S. beef.
- Introduce U.S. bison to retail and foodservice operators in Hong Kong as a niche product for the high-end consumer.
- Expand interaction with large HRI operators, such as high-end and casual dining establishments in Macau.
- Continue to build relationships with government officials and key influencers, including local beef industry stakeholders to draw attention to the benefits of U.S. beef to Chinese consumers in terms of offering safer and high quality protein options. Work with U.S. government officials and relevant Chinese organizations, especially port inspectors, to resolve commercial and technical trade issues.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- 50% of targeted importers/distributors in China and Hong Kong understand the supply capabilities and quality attributes of U.S. beef based on information provided by USMEF.
- 55% of targeted mainland China importers/distributors have a favorable attitude toward U.S. beef and are knowledgeable about the range of U.S. beef products available based on information provided by USMEF.
- 33% of targeted Hong Kong HRI outlets/chains regularly feature 4 beef cuts including at least 1 underutilized cut.
- 57% of targeted Hong Kong HRI outlets/chains actively participate in and/or contribute to USMEF promotions to their customers.
- 37% of targeted Hong Kong retailers regularly feature 5 U.S. beef cuts.
- 15% of targeted mainland China online or offline retailers feature or actively promote U.S. beef to end-consumers.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input checked="" type="checkbox"/> Increase market access <input checked="" type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input checked="" type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input checked="" type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input checked="" type="checkbox"/> Research & communicate beef's nutritional benefits <input checked="" type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic H

Tactic Name: China/Hong Kong- Market Access

Tactic Description:

In China/Hong Kong noteworthy market access issues include the following:

- A) Due to current trade tensions between the U.S. and China, China is threatening an additional 25 percent tariff on U.S. beef including chilled and frozen product effective July 6, 2018; However, trade relationships are constantly evolving, and there is potential for change over the next few months;
- B) China's zero tolerance policy on the presence of beta-agonists, hormones and pathogens in red meat imports;
- C) China's opaque and inconsistent quarantine clearance procedures/regulations;
- D) China's registration requirements for processed meat exporters;
- E) Bans on specific beef products (i.e. selected beef offal products); and
- F) Inspection of 100% of U.S. beef shipments, which substantially delays customs clearance times.

USMEF strategies for addressing these issues—in cooperation with U.S. industry organizations—focus mainly on collaborative engagement with stakeholders within China's government, academia and industry. Short-term strategies include the

following: 1) provide information on U.S. industry practices to Chinese key influencers, as well as provide the U.S. industry with analysis of newly-issued Chinese food safety, trade, quarantine, customs and other domestic regulations that may impact U.S. red meat access and export opportunities; and 2) monitor and respond where needed to media coverage of relevant issues to U.S. red meat exports. Enhancing market analysis by engaging with key opinion leaders to promote science-based technologies is a key component of the overall market access strategy.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- USMEF will contribute to and support U.S. government initiatives to eliminate trade restrictive policies.
- USMEF will collaborate and engage with key influencers within China's government, academia, and industry to demonstrate the safety in U.S. beef.
- 90% of USMEF members will report that they receive the information they need from USMEF related to market access issues.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input checked="" type="checkbox"/> Adopt traceability systems <input checked="" type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input type="checkbox"/> Research & communicate beef's nutritional benefits <input type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic I

Tactic Name: Europe- Market Development

Tactic Description:

Market Profile (EU-28):

Per Capita Beef Consumption	15.6 kg
U.S. Share of Total Beef/BVM Import Market	7%
Other Beef/BVM Suppliers & Market Shares	Brazil 28%
	Uruguay 18%
	Argentina 16%
Domestic Self-Sufficiency	100%
U.S. Beef Exports (not including variety meat) *	23,140 mt
U.S. Beef Variety Meat (BVM) Exports *	2,194 mt
Top Imported U.S. Beef Cuts: middle meats, full hindquarter sets and approximately 50% of forequarter sets	
Top Imported U.S. BVM Items:	

According to U.S. Census data, 2017 exports of U.S. beef plus variety meat to the EU were down 1 percent in volume to 23,334 mt, with value up 3 percent to \$252 million. According to EU import data, which is considered a more accurate measure of U.S. trade activity in this market, imports of U.S. beef were up nearly 5.5 percent in volume to 16,811 mt, and down 1 percent in value to \$206.5 million.

Export Forecasts		
2018	22,650 mt	\$245.3 million
2019	25,001 mt	\$273.5 million

USMEF Europe Market Development Strategies:

Build demand for U.S. beef in Europe by educating targeted buyers on the potential profitability and enhanced culinary experience available from both traditional and underutilized cuts of U.S. beef, and expand targeted reach to include lesser developed markets such as the Baltic States, Slovakia, Romania, Bulgaria, Hungary, Poland, and the Czech Republic.

Premium Products	<ul style="list-style-type: none"> • There is growing demand for high-quality (and high-priced) beef in niche segments, and while consumers may reduce the frequency of
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	<p>purchasing premium foods, they spend more as they seek the best quality in high-end restaurants and specialty shops.</p> <ul style="list-style-type: none"> • Some wealthy populations, such as consumers in Sweden and Germany, choose imported product for quality and general “uniqueness” factor. • Among the trade and many top chefs, U.S. beef is considered superior, with quality standards above other beef; however, buyers lack knowledge about non-traditional alternative cuts that could help offset the high prices of U.S. beef. • As importers generally purchase full sets (16-22 cuts), they sometimes face difficulty in marketing some of the lesser-known cuts.
<i>Strategic Objective</i>	Build distribution links for U.S. beef and educate distributors/chefs on the availability of and culinary uses for quality alternative beef cuts that are more affordable and improve margins.
<i>Tactical Response</i>	Expand the reach of U.S. beef masterclasses to provide training on a wide range of U.S. beef items, conduct cost-effective joint activities with distributors, and work with influencers (press, social media, bloggers, etc.) to raise awareness of various cuts and cooking styles.
High-end Restaurants	<ul style="list-style-type: none"> • U.S. beef is facing pressure from shipments of cheaper grain-fed beef from Australia, Uruguay and Argentina under the duty-free quota, while strong national/regional promotional campaigns marketing European beef are also a growing threat. • Despite intensified competition, higher-end restaurants represent a fantastic niche for quality U.S. beef as they tend to focus more on image, high margins and service, rather than on turning large volumes. • In some parts of the EU, there is a trend to eat less, but eat higher quality. Some restaurants are using techniques like dry-aging to add value and differentiate their menus; however European chefs, restaurant managers, and consumers often state a preference for local beef, although inconsistent quality in domestic production is a well-recognized issue. • Gourmet burger outlets are also growing in popularity, presenting a strong opportunity for the growth of chuck rolls and underutilized cuts, although cut education is key.
<i>Strategic Objective</i>	Drive the attention of distributors and downstream HRI buyers to U.S. beef, focusing on a range of cuts that offer value, versatility, and the characteristic marbling found in U.S. beef.
<i>Tactical Response</i>	Implement chef training to educate those influencers that can impact consumer purchasing decisions and expand demand for not only traditional U.S. beef cuts, but also alternative cuts.

Retail Differentiation	<ul style="list-style-type: none"> • U.S. beef has a presence in niche ecommerce in established markets such as Germany. • Although constrained by lower price points and margins, most retailers (including discounters) are nonetheless offering premium products to attract wealthier consumers. • Beyond specialty shops, more supermarkets are interested in having U.S. beef on their shelves, and cash & carry retailers are open to including alternative beef cuts as a means to reach a wider range of customers.
<i>Strategic Objective</i>	Build awareness among retailers and their customers about the attributes of high-quality U.S. beef and how to use different cuts.
<i>Tactical Response</i>	Conduct educational and promotional events in coordination with retailers to raise awareness of U.S. beef and the varied culinary uses, while positioning U.S. beef as safe and reliable.

Other Key Initiatives

- Focus on educating buyers in primary markets of Germany, Italy and the UK; secondary markets of France, Netherlands, Finland, Spain and Sweden; third-tier markets of Romania, Bulgaria, Latvia, Slovakia, Hungary, Poland, and Czech Republic; and continue to work in markets where importers are not very active as a means of opportunity for growth.
- Identify new markets, niches and trends to further build demand for high-quality U.S. beef.
- Conduct enhanced trade servicing and training and gather market intelligence to better understand the needs of local stakeholders, including segments that interact directly with end-consumers such as butchers.
- Demonstrate to EU importers and distributors that the U.S. beef industry is committed to the EU market despite short-term uncertainties with market access (duty-free quota), trade deals, etc.
- Raise the image of U.S. beef by showcasing quality cuts in high profile meals for chefs and journalists with possible continued collaboration with FAS.
- Expand online social media activities on Facebook, YouTube and Twitter to educate chefs and buyers about U.S. beef and increase exposure in the market.

Measurable Objectives (*List at least three outcome-based objectives for this tactic*):

- 95% of targeted distributors consistently purchase U.S. beef year-round.
- 45% of targeted distributors are purchasing muscle cuts other than traditional loin steak cuts.
- 90% of newly targeted distributors make trial purchases of U.S. beef.
- 60% of newly targeted retailers make trial purchases of U.S. beef.
- 40% of targeted retailers regularly offer U.S. beef to their customers.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
---------------------	---------------------	------------------------------------	--------------------------

- | | | | |
|---|---|--|--|
| <input type="checkbox"/> Adopt traceability systems
<input checked="" type="checkbox"/> Increase market access
<input checked="" type="checkbox"/> Promote unique attributes of U.S. beef | <input type="checkbox"/> Ensure antibiotic stewardship
<input type="checkbox"/> Certify & verify production practices
<input type="checkbox"/> Ensure beef safety
<input checked="" type="checkbox"/> Protect beef's image
<input type="checkbox"/> Engage beef advocates | <input type="checkbox"/> Research & innovate new production tech.
<input type="checkbox"/> Ensure beef's inclusion in dietary recommendations
<input checked="" type="checkbox"/> Motivate producers & stakeholders to engage
<input type="checkbox"/> Develop crises management plans
<input type="checkbox"/> Attract, develop & enable the next generation
<input type="checkbox"/> Defend beef's product identity | <input type="checkbox"/> Revolutionize beef marketing & merchandising
<input type="checkbox"/> Measure & improve sustainability
<input checked="" type="checkbox"/> Research & communicate beef's nutritional benefits
<input checked="" type="checkbox"/> Connect & comm. with consumers
<input type="checkbox"/> Improve product & production efficiency |
|---|---|--|--|

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic J

Tactic Name: Europe- Market Access

Tactic Description:

In Europe, noteworthy market access issues for U.S. beef include the following:

- A) High tariffs and relatively small tariff rate quotas;
- B) Rules surrounding access to the duty-free beef quota which permit other supplying countries to utilize more than 50% of the available quota volume;
- C) Restrictions on the use of most pathogen reduction treatments (PRTs) that are used in the U.S.;
- D) Failure to establish consistent and clear procedures regarding the testing of imported product for the presence of bacteria and the resulting diverse positions of Member States' veterinary services in deciding the consequences of incidents when product has tested positive;
- E) Ban on the use of beta-agonists and hormones in red meat production;
- F) Possible future extension of restrictive measures regarding animal welfare, cloned animals, and other production practices to imports.

USMEF strategies for addressing these issues—in cooperation with U.S. industry organizations—focus on building alliances with beef processors in the EU in support of

PRTs; working toward the elimination of technical and sanitary barriers, as well as expansion of the beef duty-free quota; providing assistance to help balance the number of farms/feedlots enrolled in the NHTC program with the demand in the EU; working closely with EU industry federations on animal welfare issues; and supporting U.S. government objectives to get all trade partners to adhere to science based safety and risk analysis in food production.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- USMEF will work with beef processors in the EU to educate about the safety and efficacy of PRTs and increase the number of EU processors that express support for approving PRTs to the EU.
- USMEF will educate beef producers on opportunities in the EU market by providing information on the requirements of the NHTC program.
- USMEF will contribute to U.S. government initiatives to eliminate trade restrictive policies.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input checked="" type="checkbox"/> Adopt traceability systems <input checked="" type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input type="checkbox"/> Research & communicate beef's nutritional benefits <input type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic K

Tactic Name: Japan- Market Development

Tactic Description:

Market Profile:

Per Capita Beef Consumption	10.1 kg
U.S. Share of Total Beef/BVM Import Market	43%
Other Beef/BVM Suppliers & Market Shares	Australia 47%
	New Zealand 3%
	Canada 4%
Domestic Self Sufficiency	37%
U.S. Beef Exports (not including variety meat)	258,267 mt
U.S. Beef Variety Meat (BVM) Exports	49,292 mt
Top Imported U.S. Beef Cuts: short plate, chuck eye roll, chuck flap tail, middle meats, boneless short rib, chuck short rib	
Top Imported U.S. BVM Items: tongue, outside skirt, hanging tender, intestine	

In 2017, Japan was the leading market for U.S. beef plus variety meat exports, with exports increasing 19 percent in volume to 307,559 mt and value increasing 25 percent to nearly \$1.9 billion, a new post-BSE record. U.S. beef chilled exports to Japan increased rapidly in 2017, reaching 148,688 mt (up 32 percent), and valued at \$1.102 billion (up 37 percent), capturing more than half of Japan's imported chilled beef market. While a top market for U.S. beef, market access is a continued concern with imports of Australian and Mexican beef subject to significantly lower duties, and beef from Australia, Canada, New Zealand, and Mexico all poised to gain further tariff relief through the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTP).

Export Forecasts		
2018	319,000 mt	\$2.05 billion
2019	322,508 mt	\$2.09 billion

USMEF Japan Market Development Strategies:

A) Highlight the unique product attributes of U.S. beef to increase the volume of both popular and underutilized cuts and defend market share; B) Displace the competition through expansion of U.S. beef as a substitute for Japanese and other imported beef; C) Identify new food trends to develop growing, untapped segments by conveying the consistent supply, safety, quality and versatility of U.S. beef.

<p>Niku (Meat) Boom - Evolving Foodservice Trends</p>	<ul style="list-style-type: none"> • Per capita beef consumption has increased by over a pound in just the last year. • The niku boom is resulting in a growing presence of “niku” restaurants specializing in meat dishes and new concepts, such as sushi-style meat bars. • Restaurants serving meat, steak, and roast beef are increasing due to a consistent and high-quality supply of beef compared to other proteins such as seafood, of which consumption is declining due to rising costs. • Gourmet hamburgers provide an opportunity to promote U.S. beef in authentic American-style steakhouses and burger chains. • Tourist arrivals to Japan grew nearly 22 percent in 2016 (to over 19 million people) and is expected to continue to grow to over 40 million by 2020 when the Tokyo Olympics will be held. • The \$7 billion yakiniku segment with over 22,000 restaurant outlets and growing relies heavily on large volumes of variety meats. • Increasing U.S. beef production allows for consistent supplies of a wider range of foodservice items including higher-grade beef and bone-in steaks.
<p><i>Strategic Objective</i></p>	<p>Ensure each HRI segment understands the unique quality and value of relevant cuts, including higher-end cuts, such as U.S. prime grade beef, and other cuts (tongue, skirt, hanging tender, short plate, boneless short rib, chuck short rib, chuck eye roll).</p>
<p><i>Tactical Response</i></p>	<p>Educate chefs on U.S. cuts and products for evolving foodservice trends and use chef competitions and promotions to raise the visibility of U.S. beef, defend U.S. market share, and displace the competition in a diverse set of foodservice outlets.</p>

<p>Convenience Stores and Home Meal Replacements</p>	<ul style="list-style-type: none"> • Convenience stores are one of the fastest growing retail categories, with about 58,000 outlets serving 16 million customer visits per day. • Chains focus on fresh and convenient foods, with many offering ready-made meals with meat items. • Japanese consumers appreciate the convenience and high-protein benefits of meat snacks such as beef jerky. • Demand for convenient foods and home meal replacements is a result of an increase in double-income couples and working singles who have less time to prepare meals. • Due to intense market competition, convenience stores are diversifying, offering consumers specialized experiences with coinciding shopping departments, such as FamilyMart’s sports gym and health supplement department combo.
<p><i>Strategic Objective</i></p>	<p>Increase U.S. beef usage in bento boxes and prepared meals as well as menu items such as jerky, salami, sausage, roast beef, smoked beef, pastrami, and corned beef at CVS and “deli” chains; although</p>

	individual portion sizes may be small, the daily volumes sold are huge.
<i>Tactical Response</i>	Collaborate with CVS chains, bento boxes and their suppliers to develop new items using a variety of U.S. beef cuts and highlight the ability to differentiate with U.S. beef.
American BBQ and Thick Cuts	<ul style="list-style-type: none"> • Japanese style meat is typically thin sliced; however, the premium flavor of U.S. beef is showcased in thick steak cuts. • Japanese consumers are accustomed to small portioned steaks, about 4-6 oz. • American BBQ is an evolving trend in Japan, and USMEF's "Urban BBQ" campaign has successfully highlighted this American culinary style in Japanese retail and foodservice outlets.
<i>Strategic Objective</i>	Continue introducing new culinary styles like American BBQ using thick cut steaks, highlighting the cut/cooking options and regional flavors to retail and food service sectors.
<i>Tactical Response</i>	Collaborate with both foodservice operators and retailers to develop promotions and campaigns to stimulate consumer interest in thick cut beef and encourage buyers to purchase more volume with thicker cuts.
Regional and National Retail Chains	<ul style="list-style-type: none"> • National chains typically sell imported beef, and some have developed Australian brands due to previous U.S. beef market access loss. • Regional chains, which there are over 16,000 of in Japan, were previously unable to offer U.S. beef due to inconsistent supplies. • Buyers are looking for quality, health, and value, as well as products with a story or brand.
<i>Strategic Objective</i>	Develop customized strategies, including "stories" and brands, to meet the needs of national, small, and mid-sized retail chains outside major metropolitan areas to promote a wide range of items including grilling cuts.
<i>Tactical Response</i>	Develop company-specific strategies for target accounts, provide education and promotional support to develop demand and displace the competition, and provide educational point of sale material such as recipe cards, cooking demonstrations, etc. to build consumer confidence in using new cuts, especially thick or block items.
Social Media & Online Shopping	<ul style="list-style-type: none"> • Food-related blogs, forums and networks are well received by Japanese consumers. • Consumers look for "Instagenic" food that is interesting and visually appealing, so they can post to popular social media sites. • Major retailers are adjusting their retail strategies to move towards the digital marketplace, to better compete in the e-commerce sector.

<i>Strategic Objective</i>	Leverage social media, bloggers and other online media to educate buyers and consumers on the quality, safety and value of U.S. grain-fed beef.
<i>Tactical Response</i>	Support traditional activities by conducting consumer activities highlighting the overall eating enjoyment of U.S. beef, featuring locally renowned social media influencers and popular websites such as Instagram and Facebook.

Other Key Initiatives

- Demonstrate the positive attributes of a protein-dense diet to seniors and educate active seniors on the benefits of U.S. beef in the diet as Japan’s population ages. Work with nutritionists to develop customized “senior” delivery meals featuring U.S. beef.
- Emphasize the opportunity that underutilized cuts, such as round and chuck portions, present in developing a cutting-edge menu.
- Feature the U.S. beef story across sectors to capture new market segments and differentiate U.S. beef from the competition.
- Provide cooking and merchandising information on new-to-market items (e.g., T-bone, bone-in ribeye, pound steak).
- Conduct consumer programs to provide U.S. beef nutritional information and healthy “functional” recipes that are “Instagenic”.
- Work with retailers offering online shopping to broaden the selection of cuts and customer base for U.S. beef.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- 77% of targeted importers/distributors are confident in the safety of U.S. beef.
- 77% of targeted importers/distributors are confident in the reliable supply of U.S. beef.
- 60% of targeted importers/distributors consistently purchase two or more U.S. beef alternative cuts.
- 75% of targeted HRI and retail accounts consistently feature two or more U.S. beef cuts.
- 65% of targeted HRI and retail accounts add additional U.S. beef items on the menu/in the meat case.
- 35% of targeted bento box/ convenience stores offer menu items featuring U.S. beef.
- 26% of targeted consumers are confident in the safety of U.S. beef
- 37% of targeted consumers report having purchased U.S. beef within the last 2 weeks.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
---------------------	---------------------	------------------------------------	--------------------------

- | | | | |
|---|---|--|--|
| <input type="checkbox"/> Adopt traceability systems
<input checked="" type="checkbox"/> Increase market access
<input checked="" type="checkbox"/> Promote unique attributes of U.S. beef | <input type="checkbox"/> Ensure antibiotic stewardship
<input type="checkbox"/> Certify & verify production practices
<input type="checkbox"/> Ensure beef safety
<input checked="" type="checkbox"/> Protect beef's image
<input type="checkbox"/> Engage beef advocates | <input type="checkbox"/> Research & innovate new production tech.
<input type="checkbox"/> Ensure beef's inclusion in dietary recommendations
<input checked="" type="checkbox"/> Motivate producers & stakeholders to engage
<input type="checkbox"/> Develop crises management plans
<input type="checkbox"/> Attract, develop & enable the next generation
<input type="checkbox"/> Defend beef's product identity | <input type="checkbox"/> Revolutionize beef marketing & merchandising
<input type="checkbox"/> Measure & improve sustainability
<input checked="" type="checkbox"/> Research & communicate beef's nutritional benefits
<input checked="" type="checkbox"/> Connect & comm. with consumers
<input type="checkbox"/> Improve product & production efficiency |
|---|---|--|--|

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic L**Tactic Name:** Japan- Market Access**Tactic Description:**

In Japan, noteworthy market access issues for U.S. beef include the following:

- A) Trade-distorting effects of the gate price system;
- B) The U.S. government's decision to withdraw from the TPP, which eliminated an opportunity for the U.S. industry to benefit from parallel improvements in access to the Japanese market;
- C) The lack of full access for U.S. beef, and the limitation to beef from cattle under 30 months of age;
- D) Still relatively isolated but growing concerns among the general public about U.S. production practices, including feed additives, antibiotic use/allergens, and environmental issues; and
- E) Japanese producer groups' active and effective lobbying of the Japanese government to maintain protectionist import policies.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- USMEF will contribute to and support U.S. government initiatives to eliminate trade restrictive policies, such as sanctions for residue findings.
- USMEF will support U.S. government initiatives to create a bilateral agreement with Japan.
- 90% of USMEF members will report that they receive the information they need from USMEF related to market access issues.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
---------------------	---------------------	------------------------------------	--------------------------

- | | | | |
|--|--|---|--|
| <input type="checkbox"/> Adopt traceability systems
<input checked="" type="checkbox"/> Increase market access
<input type="checkbox"/> Promote unique attributes of U.S. beef | <input type="checkbox"/> Ensure antibiotic stewardship
<input type="checkbox"/> Certify & verify production practices
<input type="checkbox"/> Ensure beef safety
<input type="checkbox"/> Protect beef's image
<input type="checkbox"/> Engage beef advocates | <input type="checkbox"/> Research & innovate new production tech.
<input type="checkbox"/> Ensure beef's inclusion in dietary recommendations
<input type="checkbox"/> Motivate producers & stakeholders to engage
<input type="checkbox"/> Develop crises management plans
<input type="checkbox"/> Attract, develop & enable the next generation
<input type="checkbox"/> Defend beef's product identity | <input type="checkbox"/> Revolutionize beef marketing & merchandising
<input type="checkbox"/> Measure & improve sustainability
<input type="checkbox"/> Research & communicate beef's nutritional benefits
<input type="checkbox"/> Connect & comm. with consumers
<input type="checkbox"/> Improve product & production efficiency |
|--|--|---|--|

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic M

Tactic Name: South Korea- Market Development

Tactic Description:

Market Profile:

Per Capita Beef Consumption	16.0 kg
U.S. Share of Total Beef/BVM Import Market	46%
Other Beef/BVM Suppliers & Market Shares	Australia 46%
	New Zealand 6%
	Canada 1%
Domestic Self Sufficiency	34%

U.S. Beef Exports (not including variety meat)	170,517 mt
U.S. Beef Variety Meat (BVM) Exports	13,635 mt
Top Imported U.S. Beef Cuts: chuck roll, chuck eye roll, top blade, chuck flap tail, outside skirt, hanging tender, short rib, chuck short rib, rib finger clod, brisket	
Top Imported U.S. BVM: femur bone, large intestine, tendon, feet, abomasum	

Outpacing the record set in 2016, U.S. beef plus variety meat exports to South Korea increased 3 percent in volume to 184,152 mt, and climbed 15 percent in value to \$1.22 billion, setting a new record for the second consecutive year in 2017. Exports of chilled U.S. beef achieved tremendous growth, increasing 73 percent in volume (45,153 mt) and 78 percent in value (\$405.8 million). Demand was especially strong from the Korean retail sector, where consumer confidence in the quality and safety of U.S. beef continues to gain momentum. In 2018, Korea's imports of U.S. beef are subject to a 21.3 percent tariff, down from 24 percent in 2017 and well below the 40 percent rate in effect prior to implementation of the Korea-U.S. Free Trade Agreement (KORUS). Under KORUS, the tariff rate is scheduled to decline to zero by 2026.

Export Forecasts		
2018	208,400 mt	\$1.46 billion
2019	211,398 mt	\$1.50 billion

USMEF South Korea Market Development Strategies:

A) Defend market share by educating buyers about the quality, profitability and versatility of high-quality U.S. beef, and provide information across sectors about U.S. industry safeguards in place to ensure a safe and consistent supply; B) Further drive demand by informing end-users and consumers about U.S. beef's positive attributes as well as alleviating lingering consumer concerns over the safety of U.S. beef.

Growing Imported Beef Consumption	<ul style="list-style-type: none"> • Korea's beef production and self-sufficiency is expected to continue to decline for several years while at the same time consumption continues to increase. • Consumption of red meat is growing in Korea as there is a greater variety of culinary concepts and product availability to meet diverse market needs. • Decreasing tariffs due to KORUS-FTA is increasing U.S. imports and consumption by making imported U.S. beef more affordable. • Chilled beef demand is growing among all sectors. In 2017, the U.S. surpassed Australia as the leading supplier of chilled beef to Korea with 55 percent market share.
<i>Strategic Objective</i>	Connect a broader group of importers/distributors to U.S. beef suppliers through various trade sector activities, and showcase the safety, quality and taste of U.S. beef across sectors.

<i>Tactical Response</i>	Use seminars, demonstrations and other educational activities to build demand for a wide range of U.S. beef cuts and products among the trade and their downstream customers.
Foodservice Diversification & Distribution	<ul style="list-style-type: none"> • USDA Prime grade beef, branded beef, and Wagyu brands are in high demand among foodservice outlets. • The growing interest in American-style cuisine such as steaks, BBQ, bone-in beef, and gourmet burgers, is penetrating both high-end and family-style restaurants, increasing the use of secondary beef cuts. • Restrictions around food trucks are easing, presenting an additional foodservice sector for U.S. beef to integrate. • Although smaller HRI distributors face more inefficiencies resulting in higher costs to their customers, they are starting to develop strategies to grow their market share, allowing for greater penetration of higher-quality beef into new foodservice segments. • Reflecting a shift in consumer tastes, the traditional fast food sector is suffering; however, U.S. concepts advocating homemade recipes, such as Shake Shack, are still growing. • Institutions are the least penetrated HRI sector but are a potential venue to move volumes of secondary beef cuts such as chuck roll, shoulder clod, short ribs, and brisket.
<i>Strategic Objective</i>	Target a variety of foodservice subsectors which demand high-quality, value-priced inputs, and promote economically-priced items that can be consistently supplied.
<i>Tactical Response</i>	Work with targeted HRI operators on using higher grades of U.S. beef along with alternative cuts (e.g., hanging tender, chuck flap tail, chuck eye roll) and new culinary styles, to displace the competition.
Retail Opportunities for Chilled and Branded Product	<ul style="list-style-type: none"> • Demand for chilled beef on ecommerce sites is growing. • In 2017, Costco, a retail leader in Korea, switched chilled beef from Australian beef to 100% U.S. beef. In spring 2018, Costco continued the shift into their deli department, shifting their most popular SKU, beef bulgogi, from Australian beef to U.S. beef. • Consumers increasingly scrutinize quality and safety when making food purchasing decisions, making story and branded products more desirable. • E-mart is leading the aged and thick cut steak trends for beef at retail, installing their own dry-aging facility in their central processing plant. • Many single and two-person household are spending more on steaks at retail to mimic the “dining out” experience, with bone-in steak growing in popularity.
<i>Strategic Objective</i>	Build awareness for U.S. chilled and story/branded beef products and identify opportunities to develop the market for new items and preparation techniques/trends.

<i>Tactical Response</i>	Introduce U.S. chilled/branded beef to high-end retailers, integrating both their in-store and online shelves, and provide customized support to displace the competition.
Single-person Households	<ul style="list-style-type: none"> • Single-person households account for 27% of Korea’s total population, pushing demand for increased convenience; this has led to a boom in the home-meal-replacement (HMR) segment which has grown to well over \$1 billion/year. • The retail and HRI sectors now routinely use premium ingredients in HMR items and are expanding their offerings of easy-to-prepare beef dishes for quality meals. • To reduce expenses, many single or two-person households are spending more on steaks at retail to mimic the “dining out” experience, with bone-in steak growing in popularity. • According to Euromonitor, ready-made meal sales in Korea grew 157% from 2012 to 2017, growing from \$219 million to \$562 million. Demand for chilled ready-made meals has been driven by freshly made meals at convenience stores (e.g. bento boxes).
<i>Strategic Objective</i>	Demonstrate the versatility and quality of economical beef cuts such as chuck eye roll and roll to the foodservice and retail sectors and their distributors for use in HMR items and in other processed products available at convenience stores.
<i>Tactical Response</i>	Work with HMR manufacturers and chefs, as well as convenience store suppliers, to develop premium convenience foods in smaller portions using underutilized U.S. beef cuts.
Social Media & Online Shopping	<ul style="list-style-type: none"> • Food-related blogs, forums and networks are heavily utilized by Korean consumers. • Online retailing is one of the fastest growing shopping platforms, and is recently expanding into the fresh food sector, which is helping build demand for chilled beef. • In 2021, Korea is expected to have the highest per capita spending on internet food/drink according to Euromonitor forecasts.
<i>Strategic Objective</i>	Use traditional and online media to educate buyers and consumers on the quality, safety and value of U.S. grain-fed beef, particularly U.S. chilled beef.
<i>Tactical Response</i>	Conduct consumer activities such as online promotions, cooking classes, etc. highlighting the overall eating enjoyment of U.S. beef, and leverage social media forums and e-tailing websites to draw consumer interest.

Other Key Initiatives

- Promote the health benefits of consuming U.S. beef to the active senior segment, which is consuming more red meat.
- Focus on the positive attributes of U.S. beef through “World Class Beef” messaging while also highlighting the safety and quality of U.S. beef, especially to younger consumers/families.
- Promote the use of underutilized cuts that offer both quality and value, compared to domestic beef and other importers.
- Grow Korean imports of U.S. chilled beef through increased coordination with major retail chains and key distributors.
- Provide training to high-end restaurants and retailers on the handling, cooking and merchandising of specialty products such as dry-aged beef.
- Introduce “low & slow” BBQ techniques to further advance the spread of the growing U.S.-style steak culture.
- Develop a positive image for U.S. beef through the use of local spokespeople and celebrities, which are more effective than foreign contributors.
- Capitalize on growing tourism to Jeju Island by promoting U.S. beef to the high-end foodservice sector on the island and familiarize importers and distributors on Jeju with U.S. beef attributes.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- 65% of targeted trade accounts report confidence in the consistent supply of U.S. chilled beef.
- Targeted importers source 70% of their imported beef from the U.S.
- 50% of targeted Korean BBQ, steak & grill, salad bar (buffet), and burger & BBQ targeted accounts feature a new U.S. beef item on the menu.
- 75% of targeted hotel and banquet accounts feature U.S. beef on their menus.
- 75% of targeted retail accounts report merchandising a wide range of U.S. beef items.
- 81% of targeted media accounts report favorably on U.S. beef and incorporate recommended key message points.
- 56% of consumers express a willingness to purchase U.S. beef.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
---------------------	---------------------	------------------------------------	--------------------------

- | | | | |
|--|---|--|--|
| <ul style="list-style-type: none"> ■ Adopt traceability systems ■ Increase market access ■ Promote unique attributes of U.S. beef | <ul style="list-style-type: none"> <input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety ■ Protect beef's image <input type="checkbox"/> Engage beef advocates | <ul style="list-style-type: none"> <input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations ■ Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity | <ul style="list-style-type: none"> <input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability ■ Research & communicate beef's nutritional benefits ■ Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency |
|--|---|--|--|

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic N

Tactic Name: South Korea- Market Access

Tactic Description:

Noteworthy issues limiting exports of U.S. beef to South Korea include the following:

- A) Korea's ban on imports of U.S. beef from cattle over 30 months of age;
- B) Pending issues with 30-month beef access for BVM product (i.e. processed beef, small intestine, tongue, casings, etc.);
- C) Korea's regulations on labeling products as natural or antibiotic free at the point of sale, as well as failure to recognize the U.S. organic standards for red meat.

USMEF strategies for addressing these issues—in cooperation with U.S. industry organizations—focus on reassuring customers at all levels of the safety of the product and the integrity of the U.S. beef production system and engaging the U.S. Department of Agriculture on the proper opportunity to engage the Korean government in expanding U.S. beef access.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- USMEF will contribute to and support U.S. government initiatives to eliminate trade restrictive policies in South Korea.
- USMEF will provide factual information about U.S. beef production and U.S. safety systems to government personnel, importers/distributors, and buyers of U.S. beef to help improve Korean confidence in the U.S. beef industry.
- 90% of USMEF members will report that they receive the information they need from USMEF related to market access issues.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
---------------------	---------------------	------------------------------------	--------------------------

Adopt traceability systems

Increase market access

Promote unique attributes of U.S. beef

Ensure antibiotic stewardship

Certify & verify production practices

Ensure beef safety

Protect beef's image

Engage beef advocates

Research & innovate new production tech.

Ensure beef's inclusion in dietary recommendations

Motivate producers & stakeholders to engage

Develop crises management plans

Attract, develop & enable the next generation

Defend beef's product identity

Revolutionize beef marketing & merchandising

Measure & improve sustainability

Research & communicate beef's nutritional benefits

Connect & comm. with consumers

Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic O

Tactic Name: Mexico- Market Development

Tactic Description:

Market Profile:

Per Capita Beef Consumption	14.9 kg
U.S. Share of Total Beef/BVM Import Market	83%

Other Beef/BVM Suppliers & Market Shares	Canada 9%
	Nicaragua 6%
	Australia 1 %
Domestic Self Sufficiency	105%
U.S. Beef Imports (not including variety meat) ¹	110,961 mt
U.S. Beef Variety Meat (BVM) Imports ¹	51,519 mt
Top Imported U.S. Beef Cuts: clod, goose neck, inside round, boneless chuck, outside round, inside skirt	
Top Imported U.S. BVM Items: tripe, outside skirt, liver, oxtail, tongue, lips, intestines	

Following the same trend as 2016, Mexico was again the second largest destination for U.S. beef plus variety meat exports in 2017 (237,972 mt, down 2 percent). Mexico was also the third largest value market in 2017, reaching \$979.7 million, up slightly from 2016. According to Mexican import data, which varies significantly from U.S. export data, imports of U.S. beef were up nearly 1 percent in volume to 162,480 mt, with value up nearly 6.5 percent to \$821 million. Mexico is a significant market for U.S. beef shoulder clods, rounds, and variety meats (taking 33 percent of U.S. variety meat exports).

Export Forecasts		
2018	242,010 mt	\$1.00 billion
2019	247,323 mt	\$1.04 billion

USMEF Mexico Market Development Strategies:

A) Capitalize on USMEF's established relationships with the trade to defend market share by demonstrating to HRI and retail decision makers and their customers the consistency and superior quality of U.S. beef; B) Build demand with a new set of buyers by demonstrating the unique attributes and profit potential of U.S. beef, and how to effectively handle and merchandise a wide range of products; C) Demonstrate the U.S. beef industry's commitment to the Mexican market to offset any Anti-American sentiments stemming from uncertainties in U.S.- Mexico trade relations.

Market Diversification	<ul style="list-style-type: none"> • Across sectors, U.S. beef is known mainly for high-end/high-cost cuts, which limits the perceived culinary applications. • Anti-U.S. sentiments create an obstacle for labelling product, especially at retail. • Concerns about reliable supply have forced Mexico to diversify beef imports, leading to an import quota for countries that do not have an FTA as well as negotiation of trade agreements with U.S. competitors.
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	<ul style="list-style-type: none"> • Nicaragua is a growing competitor in the region, and although volumes from Nicaragua are small, Mexico's imports of beef and beef variety meats from Nicaragua have more than doubled since 2015. • Developing diverse market segments for U.S. beef for a broad range of products is important for increasing buyers, meeting consumer needs, and defending market share.
<i>Strategic Objective</i>	Implement programs in a diverse range of market sectors to highlight new and more affordable items, possibly including top sirloin, flank steak, chuck tender, knuckle, and variety meats.
<i>Tactical Response</i>	Collaborate with importers to identify affordable cuts that will fulfill market needs, and train importers, HRI, and retail staff to ensure a wide selection of U.S. beef items properly presented, promoted, merchandised and origin-identified.
Medium-sized Importers & Processors	<ul style="list-style-type: none"> • Beyond the large importers/processors in Mexico, there are hundreds of smaller firms that either do not source, or could source more, U.S. product. • Many newer players do not have experience with U.S. beef and lack knowledge about the unique product attributes and specs. • U.S. beef presence in metropolitan areas is significant, but there is a need to push into regional areas of Mexico to capitalize on the opportunities in all regions.
<i>Strategic Objective</i>	Continue to broaden trade education programs to develop new segments, increase the number of committed U.S. beef buyers, and facilitate purchasing efforts.
<i>Tactical Response</i>	Provide customized support such as training seminars, handling and merchandising assistance, product positioning advice, buyer-seller linkages, and sales force training in new regions of Mexico with potential for growth.
High-end & Specialty Retail	<ul style="list-style-type: none"> • Significant depreciation of the peso has made U.S. beef a luxury for many consumers. • While older and low-income households still purchase meat at wet markets, a significant shift into shopping at supermarkets and meat boutiques is occurring in urban areas. • Meat boutiques are finding success selling high-quality U.S. beef on weekends, especially to men, and are looking to increase sales during the workweek. • Enhanced meats and water-added products are common at the retail level, keeping prices low for consumers; however, labeling is not required in Mexico.
<i>Strategic Objective</i>	Educate retailers on the profit potential of various grades of U.S. beef, and increase shelf space at selected higher-end retail outlets to displace domestic and other competing product.

<i>Tactical Response</i>	Intensify training and promotions with high-end retailers whose customers seek out quality products and are not price constrained.
Chef Product Knowledge	<ul style="list-style-type: none"> • With high beef prices, restaurants are looking for ways to keep input costs low. • The trend among resort properties of shifting from European-style dining operations to all-inclusive formats will continue to drive the push for affordability. • Chefs do not realize how alternative cuts compare on cost, flavor and cooking styles, while also providing a consistently enjoyable eating experience.
<i>Strategic Objective</i>	Work with restaurants and all-inclusive resorts to improve U.S. beef culinary applications to maximize profitability, demonstrate product consistency, and develop new users in HRI segments that move large volumes of meat.
<i>Tactical Response</i>	Demonstrate to chefs the use of value cuts such as those from bottom sirloin (tri-tip, flap, bottom butt), as well as top sirloin (coulotte), chuck tender, and the Vegas cut.
Consumer Level	<ul style="list-style-type: none"> • Noticeably more foodie bloggers gaining influence among consumers. • Consumers still need training on proper cooking techniques for high quality beef. • BBQ and grilling techniques becoming increasingly popular, presenting an ideal opportunity to push U.S. red meats for the “All-American” eating experience.
<i>Strategic Objective</i>	Work with importers, distributors, and retailers to engage more consumers with U.S. beef, U.S. cooking styles, and demonstrate the U.S. beef industry’s commitment to serving the Mexican market and fulfill consumers preferences and trends.
<i>Tactical Response</i>	Expand the reach of the USMEF’s grilling seminars to train both importers and consumers on a range of proper grilling techniques for high quality U.S. beef, and develop more recipe videos and social media material to capitalize on growing interests in the foodie blogger culture.

Other Key Initiatives

- Train importers, distributors and processors about the attributes, handling, versatility and profitability of U.S. beef for meeting a wide variety of downstream buyers’ needs.
- Leverage the growing competition in the family-style restaurant segment by promoting U.S. beef as a major point of differentiation among the top chains.
- Maximize foodservice cut utilization and profits by showing the consistency of the product and the different items that can be obtained from primals, while providing menu innovations that fit various dishes and dining formats.

- Further penetrate the regional supermarket segment, which has not consistently purchased U.S. beef, while cooperating only with retailers that do not alter/enhance the product as means to maintain the integrity and quality of U.S. beef.
- Implement web-based educational platform to train more customers along the supply chain about U.S. beef.
- Showcase U.S. beef variety meats in front of hundreds of buyers at Mexico City's huge Central de Abasto market, and similar markets in Monterrey, Guadalajara and Aguascalientes.
- Develop a social media presence on Facebook, Instagram, etc. to engage and educate the chef community as well as the trade.
- Further penetrate HRI sector as depreciation of the peso presents a strong opportunity for growth of high-end restaurants to target tourists willing to spend more.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- 75% of targeted importers/distributors/processors will actively promote a wide range of U.S. beef cuts, including value cuts, highlighting the products' quality attributes.
- 35% of targeted restaurant chains will actively feature/promote U.S. beef, including value cuts, to their customers.
- 35% of targeted restaurant/hotel groups will increase sales of U.S. beef by at least 10% (compared to the previous year) during USMEF promotions.
- 65% of targeted retailers will consistently incorporate suggested merchandising methods to promote U.S. beef to their customers.
- 65% of targeted retailers will increase sales of U.S. beef by at least 10% (compared to the previous year) during USMEF promotions.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input checked="" type="checkbox"/> Increase market access <input checked="" type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input checked="" type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input checked="" type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input checked="" type="checkbox"/> Research & communicate beef's nutritional benefits <input checked="" type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic P**Tactic Name:** Mexico- Market Access**Tactic Description:**

In Mexico, noteworthy market access issues for U.S. beef include the following:

- A) NAFTA renegotiation threatening zero duty market access.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- USMEF will contribute to and support U.S. government initiatives to mitigate or prevent trade restrictive policies.
- USMEF will provide key Mexican government decision makers with information about the benefits of liberalized trade, the U.S. food safety system, and the U.S. beef industry.
- 90% of USMEF members will report that they receive the information they need from USMEF related to market access issues.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
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- | | | | |
|--|--|---|--|
| <input type="checkbox"/> Adopt traceability systems
<input checked="" type="checkbox"/> Increase market access
<input type="checkbox"/> Promote unique attributes of U.S. beef | <input type="checkbox"/> Ensure antibiotic stewardship
<input type="checkbox"/> Certify & verify production practices
<input type="checkbox"/> Ensure beef safety
<input type="checkbox"/> Protect beef's image
<input type="checkbox"/> Engage beef advocates | <input type="checkbox"/> Research & innovate new production tech.
<input type="checkbox"/> Ensure beef's inclusion in dietary recommendations
<input type="checkbox"/> Motivate producers & stakeholders to engage
<input type="checkbox"/> Develop crises management plans
<input type="checkbox"/> Attract, develop & enable the next generation
<input type="checkbox"/> Defend beef's product identity | <input type="checkbox"/> Revolutionize beef marketing & merchandising
<input type="checkbox"/> Measure & improve sustainability
<input type="checkbox"/> Research & communicate beef's nutritional benefits
<input type="checkbox"/> Connect & comm. with consumers
<input type="checkbox"/> Improve product & production efficiency |
|--|--|---|--|

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic Q

Tactic Name: Middle East – Market Development

Tactic Description:

Market Profiles:

	Egypt		United Arab Emirates (UAE)	
	Beef	BVM	Beef	BVM
Per Capita Beef Consumption	6.6 kg		11.7 kg	
U.S. Share of Total Beef & BVM Import Market	<1%	81%	7%	>1%
Other Beef & BVM Suppliers & Market Shares	Brazil 59%	India 6%	India 40%	Australia 40%
	India 35.5%	Brazil 6%	Brazil 27%	EU-28 38%
	Paraguay 2.5%	Australia 5%	Australia 11%	Brazil 18%
Domestic Self Sufficiency	59%		15%	
U.S. Beef & BVM Exports	233 mt	70,586 mt	5,749 mt	10 mt
Top Imported U.S. Beef Cuts: flat iron, tenderloin, rib-eye, striploin, T-bone, chuck cuts (both high-quality graded beef, and standard cuts derived from cattle 30 months of age or older), brisket, round cuts, tri-tip, outside skirt flank, short rib, bone-in ribs				
Top Imported U.S. BVM Items: liver, kidney, heart				

In 2017, U.S. beef plus variety meat exports to the Middle East were down 19 percent in volume to 84,182 mt, with value down 6 percent to \$203 million. Despite economic instability, Egypt (70,586 mt, down 24 percent) continued to be the largest destination for U.S. variety meats, as the main destination for U.S. liver exports and an important destination for other variety meat items. Egypt floated its currency in November 2016, leading to foreign exchange challenges that are limiting imports. The leading muscle cut markets in the region in 2017 were the United Arab Emirates (5,749 mt) and Kuwait (2,784 mt, up 20 percent). In the summer of 2016, the Saudi Arabian market reopened to U.S. beef product; however, exports have been slow to begin due to restrictive feed regulations.

Export Forecasts		
2018	98,924 mt	\$249.08 million
2019	110,901 mt	\$275.16 million

USMEF Middle East Market Development Strategies:

A) Continue to develop the market by demonstrating the range of U.S. beef and variety meat available and build the image of U.S. beef as the premier Halal beef among new targeted buyers in all segments; B) Defend market share by reassuring buyers of the U.S. safety inspection measures, Halal certification, and premium value of U.S. beef to maintain loyalty and encourage target accounts to increase their activities with U.S. beef products.

Foodservice Expansion	<ul style="list-style-type: none"> • The flourishing HRI sector is a reflection of growing tourism, luxury hotels, and increasing demand for new dining concepts in the region. As a result, international cuisines are becoming more mainstream. • All Gulf Cooperation Council (GCC) countries are collaborating to develop new tourist attractions to further boost visitor numbers. In particular, GCC countries are preparing for the World Expo 2020 to be hosted in the UAE. • Competitive dining sector is the product of tourist centers; thus, restaurants require unique and memorable menus. • Upper-end restaurants require cost efficiency, but will not compromise on taste and quality, leading to increased interest in alternative cuts. • There is still a lack of understanding regarding proper usage of U.S. beef underutilized cuts, the internal marbling aspect of U.S. beef, and the proper degree of doneness. • Growth of mobile food trucks present an opportunity for U.S. beef. • Casual dining, fast food chains, and classic burger joints, and steakhouses are booming in the region, especially with the growing youth population, and Western chains, such as Applebee's and Chili's, have been establishing a presence in major metropolitan areas. • Lower-end, family-style restaurants are now the top destination for Select and Commercial grade beef middle meats. • More international and local culinary schools, cooking academies, and chef association are opening in Jordan and Lebanon, and are becoming highly active and influential.
<i>Strategic Objective</i>	<p>Capitalize on the growth potential in franchise restaurants for chuck roll, petite tender medallions and thin cuts. Educate chefs (and consumers) about various muscle and alternative cuts and on proper</p>

	cooking techniques to build acceptance and avoid overcooking—a common problem in the region.
<i>Tactical Response</i>	Provide culinary training on menu planning and preparation for various cuts, including flat iron, top sirloin butt, tri-tip, flank, outside skirt, ribeye, striploin, tenderloin, heel, shank, top round, brisket and chuck roll, etc.

Retail Sector Growth	<ul style="list-style-type: none"> • Modern retail growth continues at a rapid pace, and consumers increasingly seek convenience, ambiance, and a wider variety of products. • Standalone meat boutiques/gourmet stores are emerging in Jordan and Lebanon. Well-known stores include Paramount Butcher Shop, Butcher's Pride, and Chop & T-bone. • Distributors are hesitant to promote muscle cuts with retailers as they lack the marketing and merchandising knowledge to penetrate this sector. • Development and growth of convenience items, such as fresh pre-packaged, ready to eat, and portable items, in retail.
<i>Strategic Objective</i>	Educate retailers and their suppliers on proper handling and merchandising of U.S. beef, and support in-store promotions with a goal of consistent, year-round sales of chilled items.
<i>Tactical Response</i>	Provide retail staff training, and conduct demonstrations to showcase rib-eye, top sirloin butt, chuck roll, heel, shank and striploin to store customers.

Other Key Initiatives

- Position U.S. beef muscle cuts as the highest quality grain-fed option throughout the region.
- Work with the trade, particularly importers and distributors, to improve awareness of U.S. beef in light of increased competition from lower price/quality product from Brazil and India, as well as Australia's intensified brand imaging and promotional activity for chilled beef.
- Combine technical assistance with marketing support and involve targeted meat buyers from all sectors in the planning and implementation of promotion programs.
- Expand foodservice training to new accounts, focusing on beef cutting techniques, cooking instruction and an analysis of the profitability margin possible when using different cuts of U.S. beef.
- Conduct Junior Chefs' Tutorials to provide youthful chef groups education and training skills on U.S. beef production practices, grain feeding, marbling, grading, safety standards, and product consistency.

- Implement Butchering Master Classes and Butcher Training Workshops to coach and develop talented novice chefs and student chefs who are aiming towards a great career path in butchery. Classes are geared towards improving butchers' understanding of U.S. beef technical information, cutting techniques, and handling and storage techniques, making them better able to communicate with consumers, retailers and foodservice workers about U.S. beef.
- Host "American Beef Nights" in top steakhouses and restaurants to generate consumer
- Organize live cooking sessions in key retail accounts, using a professional chef to explain to shoppers about the different cooking applications and attributes of U.S. beef.
- Target housewives with Art of Cooking Classes that present alternative U.S. beef cuts and train homemakers how to cut, grill, braise, simmer, and sear the different cuts each according to its optimal cooking method.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- 65% of targeted importers/distributors have a favorable attitude toward U.S. beef/BVM based on information provided by USMEF.
- 53% of targeted importers/distributors regularly purchase U.S. beef/BVM.
- 88% of targeted HRI buyers regularly purchase U.S. beef/BVM.
- 77% of targeted fine dining and casual family-style restaurants/chains will hold U.S. beef promotions or use menu promotional materials to highlight U.S. beef.
- 85% of targeted retail chains/outlets report having a favorable attitude toward U.S. beef/BVM and are knowledgeable of U.S. beef quality based on information provided by USMEF.
- 75% of targeted retail chains/outlets identify the origin of U.S. beef/BVM and actively participate in USMEF promotions.
- 58% of targeted media reports favorably on U.S. beef and incorporates recommended key message points.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
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- | | | | |
|---|---|--|--|
| <input type="checkbox"/> Adopt traceability systems
<input checked="" type="checkbox"/> Increase market access
<input checked="" type="checkbox"/> Promote unique attributes of U.S. beef | <input type="checkbox"/> Ensure antibiotic stewardship
<input type="checkbox"/> Certify & verify production practices
<input type="checkbox"/> Ensure beef safety
<input checked="" type="checkbox"/> Protect beef's image
<input type="checkbox"/> Engage beef advocates | <input type="checkbox"/> Research & innovate new production tech.
<input type="checkbox"/> Ensure beef's inclusion in dietary recommendations
<input checked="" type="checkbox"/> Motivate producers & stakeholders to engage
<input type="checkbox"/> Develop crises management plans
<input type="checkbox"/> Attract, develop & enable the next generation
<input type="checkbox"/> Defend beef's product identity | <input type="checkbox"/> Revolutionize beef marketing & merchandising
<input type="checkbox"/> Measure & improve sustainability
<input checked="" type="checkbox"/> Research & communicate beef's nutritional benefits
<input checked="" type="checkbox"/> Connect & comm. with consumers
<input type="checkbox"/> Improve product & production efficiency |
|---|---|--|--|

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic R**Tactic Name:** Middle East- Market Access**Tactic Description:**

In the Middle East, noteworthy market access issues for U.S. beef include the following:

- A) Saudi Arabia's trade restrictive regulations on feed; and
- B) Egypt's potentially trade-limiting standards regarding hormones.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- USMEF will contribute to and support initiatives to eliminate trade-restrictive policies.
- USMEF will work with government officials throughout the region to disseminate science-based information about U.S. beef production and U.S. feed industries.
- 90% of USMEF members will report that they receive the information they need from USMEF related to market access.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
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- Adopt traceability systems
 Increase market access
 Promote unique attributes of U.S. beef

- Ensure antibiotic stewardship
 Certify & verify production practices
 Ensure beef safety
 Protect beef's image
 Engage beef advocates

- Research & innovate new production tech.
 Ensure beef's inclusion in dietary recommendations
 Motivate producers & stakeholders to engage
 Develop crises management plans
 Attract, develop & enable the next generation
 Defend beef's product identity

- Revolutionize beef marketing & merchandising
 Measure & improve sustainability
 Research & communicate beef's nutritional benefits
 Connect & comm. with consumers
 Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic S**Tactic Name:** Oceania – Market Development**Tactic Description:**

Market Profiles:

	Australia	New Zealand
	27.5 kg	15.6 kg
U.S. Share of Total Beef/BVM Import Market	4.5%	1.5%
Other Beef/BVM Suppliers & Market Shares	New Zealand 86%	Australia 94%
	Brazil 7%	Fiji 2%
		Sweden 1%
U.S. Beef Exports (not including variety meat)	1,019 mt	180 mt

U.S. Beef Variety Meat (BVM) Exports	2 mt	0 mt
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Exports of U.S. beef to Oceania were down 43 percent in volume 2017 (to 1,201 mt), and were down 3 percent in value to \$4.8 million, driven mainly by a drop in exports to Australia. As major beef producers and even global exporters of beef, Australia and New Zealand are both customers and competitors to the U.S. beef industry.

New Export Markets	<ul style="list-style-type: none"> • Australia and New Zealand are both self-sufficient beef producers, although drought has limited Australian production in previous years. • Seasonal herd size fluctuations may impact domestic supplies and require imports. • Interest in U.S. product is mainly for processed and canned beef. • Consumers tend to support local, domestic industries.
<i>Strategic Objective</i>	Introduce high-end niche buyers for retail or HRI to U.S. beef, highlighting processed product variety and quality, and the benefits of the U.S. grain-fed system, while remaining conscious of protectionist attitudes for domestic beef.
<i>Tactical Response</i>	Expose potential buyers to U.S. beef via increased presence at targeted trade shows, organize buyer teams to visit the U.S. for formal introductions to the U.S. industry and support existing buyers with trainings, promotions, etc., without drawing negative attention to the U.S. as a “foreign” supplier.

Other Key Initiatives

- Gather and disseminate information on market needs and introduce U.S. suppliers to potential buyers as appropriate.
- Introduce new products to potential buyers, and conduct desk-side trainings as requested to expand the range of U.S. beef products sold to this region.

Measurable Objectives (*List at least three outcome-based objectives for this tactic*):

- USMEF will attend at least 1 Oceania targeted trade show throughout the year to begin introducing buyers in the region to U.S. beef products.
- USMEF will organize and host at least 1 buyers’ team from Oceania to observe the U.S. beef production process.
- At least 60% of USMEF members will report receiving the information they need from USMEF regarding market access.

LRP Strategic Initiatives Addressed by this Tactic (Check all that apply)

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
---------------------	---------------------	------------------------------------	--------------------------

- | | | | |
|---|---|--|--|
| <input type="checkbox"/> Adopt traceability systems
<input checked="" type="checkbox"/> Increase market access
<input checked="" type="checkbox"/> Promote unique attributes of U.S. beef | <input type="checkbox"/> Ensure antibiotic stewardship
<input type="checkbox"/> Certify & verify production practices
<input type="checkbox"/> Ensure beef safety
<input checked="" type="checkbox"/> Protect beef's image
<input type="checkbox"/> Engage beef advocates | <input type="checkbox"/> Research & innovate new production tech.
<input type="checkbox"/> Ensure beef's inclusion in dietary recommendations
<input checked="" type="checkbox"/> Motivate producers & stakeholders to engage
<input type="checkbox"/> Develop crises management plans
<input type="checkbox"/> Attract, develop & enable the next generation
<input type="checkbox"/> Defend beef's product identity | <input type="checkbox"/> Revolutionize beef marketing & merchandising
<input type="checkbox"/> Measure & improve sustainability
<input checked="" type="checkbox"/> Research & communicate beef's nutritional benefits
<input checked="" type="checkbox"/> Connect & comm. with consumers
<input type="checkbox"/> Improve product & production efficiency |
|---|---|--|--|

Committee(s) to Score this Tactic (Check all that apply)

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic T**Tactic Name:** Russia & Surrounding Region- Market Development**Tactic Description:**

Market Profiles:

	Russia	Kazakhstan
Per Capita Beef Consumption	12.6 kg	26.2 kg
U.S. Share of Total Beef/BVM Import Market	0%	6%
Other Beef/BVM Suppliers & Market Shares	Brazil 33%	Ukraine 47%
	Belarus 30%	EU-28 37% (Italy-10%, Denmark 5%, France 1%)
	Paraguay 18.5%	Poland 18%
Domestic Self Sufficiency	73%	96%
U.S. Beef Exports (not including variety meat)	0 mt	30 mt
U.S. Beef Variety Meat (BVM) Exports	0 mt	82 mt

Top Imported U.S. Beef Cuts: ribeye, striploin, tenderloin, short ribs, top blade, short plate, hanging tender, skirt, flanks

Top Imported U.S. BVM Items: liver, trimming
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U.S. beef has remained locked out of Russia since 2013 when the country enacted an import ban due to political disputes. Prior to 2013, Russia was the U.S. beef industry's sixth largest export market. While it is unlikely that the import ban will be lifted in the near future, USMEF's staff in Russia maintains regular contact with major market players through meetings and attendance at major events. Neighboring countries in the region continue to represent solid untapped potential for U.S. beef, and USMEF targets the most promising markets, namely Ukraine, Kazakhstan, Azerbaijan, Moldova, Kyrgyzstan, Georgia and Uzbekistan. In 2017, U.S. beef exports plus variety meat exports to Kazakhstan increased from 10 mt in 2016 to 112 mt in 2017.

In addition to the current political ban on U.S. beef imports, Russia also remains closed to U.S. beef due to its zero tolerance for ractopamine residues. Further, Russia has been striving to harmonize its food safety standards with those of the EU and will not allow the use of hormones in beef production. Thus U.S. beef's return to Russia will face significant constraints. SPS barriers for the Euro Asian Economic Union (EAEU – Armenia, Belarus, Kazakhstan, Kyrgyzstan and Russia) are the same as for Russia. Other countries in the region allow for relatively easy access for U.S. beef, though this situation remains fluid as some countries seek closer integration with Russia (e.g., Tajikistan) or the EU (Georgia, Ukraine, Moldova).

Important considerations include the region's turbulent economic situation and the modest disposable incomes of the consumers, which are impacting demand from both processors and consumers. Further, increased production of Russian high-quality beef and concentrated Russian efforts targeted at larger exports to neighboring countries are changing the competitive environment. However, it remains to be seen whether Russian high-quality beef production will be sustainable, and if so, if it can compete with Australia and the U.S. in the region. This production could be seen as preferential to buyers in the EAEU.

Export Forecasts (Includes Regional Exports)		
2018	135 mt	\$845,914
2019	190 mt	\$1.17 million

USMEF Russia & Surrounding Region Market Development Strategies:

Increase availability of U.S. beef products including alternative cuts and variety meat and strengthen the image of U.S. beef throughout the region by differentiating U.S. beef from the competition, and educating buyers about the profitability and benefits of using high quality U.S. beef products.

<p>Regional Expansion</p>	<ul style="list-style-type: none"> • Russia is increasing investments in expanding domestic high-quality beef production to eliminate the need for foreign imports, but domestic production is still low and unpredictable. • The nascent regional markets outside of Russia represent potential for further penetration of U.S. beef and provide greater diversity for U.S. beef exports. • Ukraine, Kazakhstan, Azerbaijan, and some Central Asian countries are showing growth in beef consumption, and several countries have strong traditions of using offal products in ethnic cuisines. • In general beef remains expensive for the average consumer; however, opportunities exist for alternative cuts that are still perceived as high-quality beef. • Some high-end retailers have picked up U.S. beef in regions such as Kazakhstan, setting the stage for other retailers and increasing U.S. beef visibility. • While the number of U.S. beef users has grown, buyers have struggled with yield and end-product results, and most only know about the higher priced loin cuts.
<p><i>Strategic Objective</i></p>	<p>Reimage U.S. beef as affordable for the consumer by creating demand in regions such as Azerbaijan, Georgia, Moldova, Kazakhstan, and Uzbekistan with increased visibility and availability of U.S. beef.</p>
<p><i>Tactical Response</i></p>	<p>Involve more importers and their downstream customers in U.S. beef Masterclasses to demonstrate the versatility and profitability in U.S. beef alternative cuts and a variety of beef grades, and support promotions at willing retailers with tasting demonstrations, POS material, etc.</p>
<p>Foodservice Opportunities</p>	<ul style="list-style-type: none"> • Ukraine, Georgia, Kazakhstan, Uzbekistan, and Azerbaijan have well-developing HRI and retail sectors, which are viable targets for U.S. beef and veal. • In general, the foodservice sectors in intermediate cities throughout the region are improving and becoming more focused on offering quality, creating opportunities for U.S. beef. • As oil prices increase and the economy improves, foodservice operators can provide more high-quality products to meet the demands of wealthier consumers.

	<ul style="list-style-type: none"> • The HRI sector depends on imported beef, and interest in high quality beef and variety meats continues to grow; however, Russia's beef production and its drive for export opportunities may create a more competitive environment for U.S. beef in the region. • A prolonged ban in Russia has already led to high prices for domestic Russian steak, forcing some restaurants to switch to other proteins; however, marketing for domestic marbled beef may encourage consumption of high quality beef both at foodservice and retail as it cultivates beef usage traditions and improves perception of the protein. New knowledge of high quality beef in Russia will trickle down to other markets in the region. • High domestic prices and marketing efforts of domestic beef producers have already created opportunities for alternative beef cut usage.
<i>Strategic Objective</i>	Engage more restaurants to try U.S. beef, including alternative cuts for family-style dining and catering, and train on the advantages of using U.S. beef over domestic or regional supplies.
<i>Tactical Response</i>	Use reputable and "famous" chefs to host culinary training sessions for HRI buyers on proper cooking techniques (e.g. not to overcook), and how to differentiate high quality, marbled U.S. beef from competing product while demonstrating the versatility in U.S. beef alternative cuts.

Other Key Initiatives

- Advise and support regional distributors on the best ways to market high quality U.S. beef.
- Maintain long-term relationships and regular contact in Russia to regain share when the market reopens by quickly restoring buyer knowledge and confidence.
- Increase visibility for U.S. beef by attending world renowned and popular trade shows.
- Conduct workshops in newer markets in the region on fabrication, cutting, portion control, and the best methods of cooking both popular and secondary U.S. beef cuts.
- Demonstrate to chefs and distributors that U.S. beef cuts like shoulder clod, chuck roll, and top sirloin butt can be effectively used in foodservice and in-home settings due to the high marbling and optimal quality-price ratio.
- Educate larger processors on how U.S. beef can meet their needs, gather market intelligence on what attributes are most important (such as leanness and better packaging), and continue to build a strong U.S. reputation with these processing companies.
- Educate consumers on the unique attributes of U.S. beef to assist in building demand at HRI and retail.
- Continue to focus on new opportunities, including increased alternative cut usage, growth in chilled beef at retail, and online meat shops.

- Monitor the development of domestic beef production specifically targeting higher-end segments in order to adjust U.S. beef strategies accordingly.
- Penetrate the e-commerce sector with high quality U.S. beef as consistency in the e-commerce market is highly valued.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- 92% of targeted trade accounts understand U.S. beef’s quality attributes based on information provided by USMEF.
- 92% of targeted trade accounts understand how to properly handle U.S. beef.
- 86% of targeted HRI outlets/restaurant chains regularly stock U.S. beef.
- 93% of targeted retail outlets identify the origin of U.S. beef.
- 60% of targeted retail outlets actively promote U.S. beef products.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef’s Value Proposition
<input type="checkbox"/> Adopt traceability systems <input checked="" type="checkbox"/> Increase market access <input checked="" type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input checked="" type="checkbox"/> Protect beef’s image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef’s inclusion in dietary recommendations <input checked="" type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef’s product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input checked="" type="checkbox"/> Research & communicate beef’s nutritional benefits <input checked="" type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic U

Tactic Name: Russia & Surrounding Region- Market Access

Tactic Description:

Market Profiles:

In Russia & the Surrounding Region, noteworthy market access issues for U.S. beef include the following:

- A) Russia's current political ban on U.S. red meat imports;
- B) The Russian and Euro-Asian Economic Union (EAEU) zero tolerance policy on the presence of beta-agonists and synthetic hormones in beef;
- C) Russia's longstanding TSE-related restrictions on imports of U.S. beef;
- D) Russia's zero tolerance policy on the presence of selected pathogens (e.g., Salmonella) and Tetracycline;
- E) Other regional countries' attempts to harmonize standards in line with either the EU or EAEU, both of which include growth promotant bans and other increased veterinary restrictions (i.e. may threaten access in Kazakhstan, which currently maintains its own approved plant list).

Once the political situation in Russia normalizes, USMEF strategies for addressing these issues—in cooperation with U.S. industry organizations—will focus on educating Russian government decision makers about U.S. production processes, and supporting the U.S. government's efforts to press Russia to adopt international standards as it implements its new WTO commitments and obligations.

- Specific tactics may include a) restoring good working relations with Russia's veterinary service and increasing efforts to engage Russian government officials in various training/exchange programs to explain U.S. production practices; b) undertaking efforts to communicate on a regular basis with various Russian industry associations and leading producers to gain support for using new production technologies, and making the Russian market and its regulations more transparent and predictable; c) continuing regular contact with scientific institutions in the meat sector as well as policy institutions that develop Russian food standards and regulations to win support for and re-emphasize the safety of production enhancing technologies; and d) capitalize on Russia's efforts to develop beef exports to introduce and gain acceptance for new production technologies and internationally accepted standards.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- USMEF will educate the region's government decision makers about U.S. production processes to eliminate trade restrictive policies.
- USMEF will continue regular contact with buyers previously purchasing U.S. beef in preparation for market normalization.

- 90% of USMEF members will report that they receive the information they need from USMEF related to market access issues.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input checked="" type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input type="checkbox"/> Research & communicate beef's nutritional benefits <input type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic V

Tactic Name: South America- Market Development

Tactic Description:

In 2017, exports of U.S. beef plus variety meat to the South America region were up 24 percent to 28,383 mt in volume, increasing 23 percent in value to nearly \$115 million. Exports of U.S. beef increased to Chile, Peru, and Colombia, three of the main markets in South America. U.S. beef variety meats alone increased 29 percent to the region, up to 12, 611 mt from 9,793 mt in 2016. Peru was the leading export market for U.S. beef variety meats.

Export Forecasts		
2018	29,248 mt	\$125.1 million
2019	32,468 mt	\$142.3 million

USMEF South America Market Development Strategies:

Continue to develop the market by communicating the quality, consistency and profit potential of U.S. beef across sectors, and by introducing U.S. beef value cuts and variety meats to buyers.

	Peru	Chile
Per Capita Beef Consumption	6.7 kg	26.0 kg
U.S. Share of Total Beef/BVM Import Market	29%	5%
Other Beef/BVM Suppliers & Market Shares	Argentina 21%	Paraguay 47%
	Brazil 21%	Brazil 31%
	Bolivia 7%	Argentina 14%
Domestic Self Sufficiency	97%	43%
U.S. Beef Exports (not including variety meat)	1,453 mt	10,630 mt
U.S. Beef Variety Meat (BVM) Exports*	6,268 mt	1,744 mt
Top Imported U.S. Beef Cuts: chuck roll, short rib, knuckle, strip loin, ribeye, flank, coulotte, tri-tip, outside skirt		
Top Imported U.S. BVM Items: tripe, liver, heart		
Top Imported U.S. BVM Items: tripe, liver, heart		
Developing Markets	<ul style="list-style-type: none"> • Consumers in Peru and Chile are willing to pay higher prices for high-quality beef, and interest is growing in other markets. • Competition from Argentina and Uruguay is growing as the quality from these competitor beef suppliers is improving. • Infrastructure challenges make it difficult to reach intermediate cities. • Many market segments are unfamiliar with U.S. beef, and inefficient handling and a lack of product knowledge can result in low yields and an unfavorable eating experience. • Recent high U.S. beef prices and unfavorable exchange rates have impacted the competitiveness of U.S. product, amid a decline in the region's total beef imports. 	
<i>Strategic Objective</i>	Educate buyers on the quality and profit potential of U.S. beef, including value cuts and other more affordable products, and demonstrate effective merchandising of unfamiliar products.	

<i>Tactical Response</i>	Provide hands-on deskside training on proper handling and cold chain management for the HRI and retail sectors to ensure a positive eating experience with a range of U.S. beef cuts.
Retail Development	<ul style="list-style-type: none"> • Retail ranges from wet markets, like Yerbateros in Peru, to modern supermarkets and hypermarkets such as Walmart. • While mainly sold in wet markets, beef variety meats can also be found in modern retail. • The growing middle class is spending more on premium food items, including imported beef. • With high meat prices, some consumers are looking to purchase smaller quantities at more affordable prices; however, high-quality beef is still a luxury item for many consumers. • Retailers in Colombia generally hesitate to label U.S. origin on product due to pressure from the domestic pork industry. • Retail giants, like Walmart, are slowly integrating ecommerce concepts into their retail models, adding services like a “click list” for added convenience.
<i>Strategic Objective</i>	Work with retailers to identify the U.S. origin and promote U.S. beef cuts by improving product labels and maintaining product rotation to increase consumer confidence.
<i>Tactical Response</i>	Conduct seminars for supermarket chains and buyers in wet markets to increase the number of U.S. cuts offered, demonstrate proper handling, and highlight the profit potential of portion-control packaging.
Favorable Access	<ul style="list-style-type: none"> • Brazil reopened to U.S. beef in 2016 after a 13-year absence; However, challenges with complex registration regulations have delayed shipments into 2017. U.S. livers, picanha, and tri-tip are in high demand, but opportunities for more cuts may exist with meat boutiques. • U.S. beef now has expanded access to Ecuador and Uruguay, though Ecuador remains non-transparent regarding their import licensing process. • The removal of the EV requirement for Colombia and Ecuador increases eligible U.S. exporter plants to over 500, while also increasing opportunities for value-added items.
<i>Strategic Objective</i>	Further build the image and visibility for U.S. beef among buyers who may be price-sensitive and must to be educated on the premium quality of U.S. beef.
<i>Tactical Response</i>	Provide training and promotional support to help expand sales of new U.S. beef items entering these emerging markets.

Other Key Initiatives

- Facilitate sales by conducting activities that directly bring buyers together with U.S. suppliers, especially medium/small suppliers interested in growing exports to South America, such as the Latin American Product Showcase.
- Continue to identify U.S. suppliers willing to offer smaller packaging and partial loads to South America.
- Demonstrate to importers and purveyors how to use the latest available technologies, including procedures to freeze and thaw meats, to preserve quality and food safety.
- Increase buyer awareness about U.S. beef variety meats and lower-cost alternative cuts and how to fabricate, package and promote them to increase sales.
- Strengthen the foodservice channel in Chile and other markets by working with newly identified trade partners (importers/distributors) to conduct joint educational and promotional activities.
- Use interactive merchandising and culinary education to drive sales in high-end foodservice, focusing on higher-graded and branded U.S. beef.
- Work with the HRI sector to promote U.S. burgers as a way to maintain volume sales and eating quality experience with affordable products.
- Provide training on proper cooking techniques to avoid overcooking and to maximize the taste experience.
- Coordinate promotions with HRI and retail partners to raise the visibility and image of U.S. beef.
- Expand activities into secondary cities with stable cold chain infrastructure in key markets throughout the region.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- 80% of targeted importers/distributors have a favorable attitude toward U.S. beef based on information provided by USMEF.
- 73% of targeted importers/distributors consistently source U.S. beef.
- 66% of targeted HRI outlets/chains regularly use U.S. beef.
- 90% of targeted retailers identify the origin of U.S. beef on product.
- 90% of targeted retailers actively promote the attributes of U.S. beef to their customers.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input checked="" type="checkbox"/> Increase market access <input checked="" type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input checked="" type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input checked="" type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input checked="" type="checkbox"/> Research & communicate beef's nutritional benefits <input checked="" type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic W**Tactic Name:** South America- Market Access**Tactic Description:**

In South America, noteworthy market access issues for U.S. beef include the following:

- A) BSE-related bans on beef to Argentina and Venezuela;
- B) Chile's restrictive beef labelling requirements;
- C) Brazil's onerous label registration process for beef products;
- D) Colombian rules which prohibit frozen meat from being thawed for sale at retail;
- E) Port issues related to dirty containers and documentation/labeling in Colombia;
- F) Ecuador's nontransparent import licensing process; and
- G) No negotiated export protocol for any red meat products to Bolivia.

USMEF strategies for addressing these issues—in cooperation with U.S. industry organizations—focus on building alliances with importers, researchers and others, encouraging them to lobby their governments to drop unreasonable restrictions on red meat imports from the U.S., and educating government decision makers about the safety of U.S. beef.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- USMEF will work with port officials and U.S. suppliers to disseminate information about import issues (such as dirty containers, labeling issues, etc.) and help streamline the export process.
- USMEF will present scientific evidence on the safety of U.S. beef to the region’s importers, researchers, & decision makers.
- 90% of USMEF members will report that they receive the information they need from USMEF related to market access issues.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input checked="" type="checkbox"/> Adopt traceability systems <input checked="" type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input type="checkbox"/> Research & communicate beef's nutritional benefits <input type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic X

Tactic Name: Taiwan- Market Development

Tactic Description:

Market Profile:

Per Capita Beef Consumption	7.1 kg
U.S. Share of Total Beef/BVM Import Market	37%
Other Beef/BVM Suppliers & Market Shares	Australia 28%
	New Zealand 18.5%
	Paraguay 6%
Domestic Self Sufficiency	4%
U.S. Beef Exports (not including variety meat)	44,552 mt
U.S. Beef Variety Meat (BVM) Exports	248 mt
Top Imported U.S. Beef Cuts: rib fingers, short plate, chuck roll, shank, BL short ribs, top blade, chuck flap tail	
Top Imported U.S. BVM Items: tendon	

U.S. beef and variety meat exports to Taiwan set a new value record in 2017, increasing 13 percent from 2016 levels to \$409.7 million. Volume was up 2 percent to 44,800 mt, hitting a new record in 2017. U.S. beef holds 72 percent of Taiwan's imported chilled beef market, the highest share of any Asian destination. Taiwan is a key market for secondary beef cuts such as the clod heart, petite tender, and top sirloin cap.

Export Forecasts		
2018	53,570 mt	\$509.83 million
2019	54,773 mt	\$526.48 million

USMEF Taiwan Market Development Strategies:

Maintain loyalty among key buyers to defend market share, and develop new customers by demonstrating the variety, profitability and superior quality of U.S. beef, emphasizing first and foremost the safety of the product, but also its value and versatility.

Diverse Dining Culture	<ul style="list-style-type: none"> Taiwan is a melting pot of various cultures and ethnicities, as a result there are many types of cuisines available—and they each tend to use beef cuts with specific attributes.
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	<ul style="list-style-type: none"> • With diverse options to choose from, consumers lack loyalty to a single type of restaurant; thus, to thrive in the long-term, operators must create menus that continually satisfy and intrigue consumers. • The number of outlets available per foodservice brand is declining as consumers grow bored with repetitive options. Instead, an increasing number of brands with only a few outlets are appearing in the market. • Similar to other Asian cultures, the eat alone trend is a nascent concept in Taiwan. • Successful promotions or marketing strategies from other Asian markets can typically be applied to Taiwan, where Japanese, Korean, and Chinese influences are strong.
<i>Strategic Objective</i>	Increase cut diversity within the HRI sector by promoting specific cuisines that have potential to utilize a variety of beef cuts, and that also coincide with consumer eating trends.
<i>Tactical Response</i>	Provide new cut information to importers and educate buyers on cuts for emerging trends and cooking methods, follow up with promotions to boost sales, conduct related consumer events to further grow demand for these dining styles, and continue to promote the “100 tastes of U.S. beef” slogan to highlight U.S. beef’s versatility.
High-End Restaurants	<ul style="list-style-type: none"> • Leading restaurants are willing to add unique items or concepts to create distinctive menu choices. • Dry-aged, wagyu and branded beef are traditionally media favorites. High-visibility coverage is invaluable in helping expand market reach and enhancing product image. • Japanese Wagyu is available in the market as of 2017, drawing attention from the high-end foodservice sector.
<i>Strategic Objective</i>	Reintroduce buyers and consumers to various high-quality U.S. beef products, and highlight the uniqueness (e.g., the “story”), versatility and profitability compared to the competition.
<i>Tactical Response</i>	Work with high-end restaurants on the utilization, preparation and promotion of U.S. beef items such as dry-aged, chilled American wagyu specialty cuts and branded products.
Evolving Retail	<ul style="list-style-type: none"> • Major foreign convenience store brands, such as Seven Eleven and FamilyMart, are continuing to expand in the market. • Convenience stores are offering fresh products, with FamilyMart bringing BBQ items to their shelves in 2017. • Wholesale markets, like Costco, offer U.S. beef. • Traditional retailers typically do not sell alternative cuts; however, consumers can find alternative cuts in newly popular meat boutiques or through vendors advertising on Facebook.

<i>Strategic Objective</i>	Integrate more U.S. beef into the Taiwan retail channel, especially more affordable alternative cuts, while building retailer confidence in U.S. beef for long-term use.
<i>Tactical Response</i>	Support willing traditional, convenience store, and meat boutique retailers with promotions, tasting demonstrations, and educational material to launch new alternative cuts and highlight U.S. origin.
Social Media and Consumer Confidence	<ul style="list-style-type: none"> • Consumers in Taiwan are heavy users of social media sites, such as Facebook, and rely on this platform to share information. • Past negative media and anti-U.S. beef campaigns have hurt exports, though perceptions of U.S. beef are gradually improving. • More consumers are seeking fresh/healthy convenience items, though food safety is a lingering concern in general among consumers. Improving and maintaining consumer trust is a priority.
<i>Strategic Objective</i>	Educate importers, restaurateurs and retailers on U.S. beef production safety, and use unified messages to create a favorable image among consumers and displace competitors.
<i>Tactical Response</i>	Create content to heighten visibility for U.S. beef and educate on U.S. beef safety and quality, including videos to be shared on Facebook, while collaborating with foodservice and retail partners to highlight specific promotions featuring cuts such as Tri-Tip and Delmonico steaks.

Other Key Initiatives

- Continually analyze the market to identify gaps in supply within desired price ranges, and position U.S. beef to take advantage of these opportunities.
- Work with U.S. packers to address global trends and capitalize on opportunities to quickly move specific cuts (e.g., currently boneless short ribs, bone-in short ribs, short plate, rib cap plate and plate finger) using specialized initiatives targeting importers, distributors, foodservice operators and retailers.
- Educate the foodservice sector on dry-aging for cuts beyond striploin and ribeye.
- Promote chilled beef in retail and help retailers distinguish U.S. origin.
- Broaden awareness of U.S. niche beef items, including natural/organic, branded and breed-specific products.
- Capitalize on the growing number of Chinese tourists traveling to Taiwan by training chefs in tourist regions on the range and quality of U.S. beef cuts available.
- Target younger chefs and consumers through events and social media to promote venues/menus featuring U.S. beef, and use PR activities to highlight Taiwanese consumers accepting and enjoying U.S. beef.
- Rotate highlighted cuisines, such as hot pot or steak, that are featured at consumer events to keep buyers' interest.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- 100% of targeted trade accounts will report having a favorable attitude toward U.S. beef based on information provided by USMEF.
- 87% of targeted trade accounts have a willingness to purchase additional U.S. beef items.
- 100% of targeted trade accounts collaborate with downstream customers to promote U.S. beef.
- 100% of targeted restaurants actively participate in and contribute to USMEF promotions to their customers.
- 80% of targeted restaurants use U.S. beef for a new menu item.
- 53% of targeted retailers stock/promote an alternative U.S. beef cut.
- 69% of targeted retailers actively promote the attributes of U.S. beef to their customers.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input checked="" type="checkbox"/> Increase market access <input checked="" type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input checked="" type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input checked="" type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input checked="" type="checkbox"/> Research & communicate beef's nutritional benefits <input checked="" type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic Y

Tactic Name: Taiwan- Market Access

Tactic Description:

In Taiwan, noteworthy market access issues for U.S. beef include the following:

- A) BSE-related restrictions on imports of U.S. ground beef and variety meat from cattle under 30 months of age and all products from cattle over 30 months of age.

USMEF strategies for addressing these issues—in cooperation with U.S. industry organizations—focus on communicating information about U.S. meat safety systems, U.S. government export requirements, and U.S. production practices, and providing government authorities, opinion leaders, the media, the trade, and the general public with science-based assurances about the U.S. meat industry.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- USMEF will contribute to and support U.S. government initiatives to eliminate trade restrictive policies.
- USMEF will provide factual information about U.S. meat safety and quality to Taiwan industry, government, and academic stakeholders.
- 90% of USMEF members will report that they receive the information they need from USMEF related to market access issues.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input checked="" type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input type="checkbox"/> Research & communicate beef's nutritional benefits <input type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Tactic Z

Tactic Name: Global Activities/New Market Research & Development

Tactic Description:

In light of growing global meat production, long-term and sustainable U.S. beef exports will be dependent on further identification and development of both new and existing export markets. Shifting global dynamics, including changes in global economies, trade relationships, demographics, and consumption patterns will continue to create new opportunities for the U.S. beef industry as USMEF evolves existing strategies and develops new programs for export growth. Committed to the long-term and sustainable growth of the U.S. beef industry, USMEF will continue to employ strategic market development tactics in key markets with high potential, such as China, in order to position the U.S. industry for rapid expansion and displacement of competitor product. USMEF recognizes the continual need to develop new outlets for U.S. beef, which will require further research in key strategic markets to identify the highest potential for export growth.

New markets demonstrating traits of rapid development, such as Sub-Saharan Africa, provide potential growth opportunities for the beef industry. In order to identify, develop, and capitalize on these additional opportunities as they become available for U.S. beef export, USMEF will continue to utilize the following tactics: A) Conduct market, economic, and technical research to identify and develop new opportunities for U.S. beef exports, B) Educate and support targeted buyers in new markets about the quality of U.S. beef products and the commitment of the U.S. industry to building and maintaining supply relationships; and C) Introduce U.S. suppliers to potential in-market buyers and increase opportunities for U.S. buyers and suppliers to meet face to face.

Measurable Objectives *(List at least three outcome-based objectives for this tactic):*

- USMEF will collaborate with U.S. beef industry stakeholders to identify and research potential new outlets for U.S. beef exports.
- USMEF will support U.S. government efforts to increase access for U.S. beef exports into new markets.
- USMEF will help the U.S. beef industry respond to changes in market needs, disseminating information from buyers regarding competition, demand, and U.S. beef performance.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input checked="" type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input type="checkbox"/> Research & communicate beef's nutritional benefits <input type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovations	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

SUPPLEMENTAL INFORMATION FOR THIS AR**1. Will all work detailed in this AR be completed by the end of the fiscal year?**

Yes

If not, please provide an explanation.

All objectives outlined in this AR are expected to be achieved by the end of the fiscal year. However, objectives are designed to be part of a long-term strategy plan, which will continue into the next fiscal year, and is subject to changes in trade access.

2. Please explain changes from FY 2018 approved AR:

In collaboration with the U.S. beef industry, USMEF makes an annual, systematic assessment of its resource allocation to each market where it conducts programs. Key elements contributing to market evaluation include but are not limited to the current and anticipated size of the market (export volume/value), current and medium term (3-5 years) market access conditions and competitive environment, degree of penetration of USMEF programs, various economic factors, the cost of doing business, and the measured results of program initiatives based on on-the-ground analysis. USMEF adjusts priorities accordingly, making recommendations

proposed to the U.S. beef industry via an annual meeting reflective of the “Unified Export Strategy” proposed to the Foreign Agriculture Service for the following fiscal year’s Market Access Program funding.

The U.S. beef industry will continue to face market access challenges in 2019 as the effects of withdrawal from TPP begin to surface, the direction of NAFTA renegotiation remains uncertain, and as rising tensions with China have resulted in additional tariffs on U.S. beef that may continue to fluctuate throughout the course of the year. The potential to disrupt exports to the beef industry’s largest international trading partners- Japan, Mexico, and Canada- will continue to be a major concern moving into 2019, especially as beef production from competitors, such as Australia, continues to improve. However, growing demand for chilled U.S. beef in Asia and access to China (despite tariffs) are opportunities for growth.

USMEF’s strategic priorities in FY19 are reflective of current market conditions: Japan will remain a top priority for beef export as the leading volume and value export market in 2017, although funding will be slightly less than in previous years due to recent market access restrictions. Strategies will focus on defending market share in Japan and shielding exports from the challenges of withdrawal from TPP. South Korea will also remain a top priority as demand for high-quality U.S. beef continues to grow and market access conditions appear to be stable. South Korea was the third largest volume market for U.S. beef exports in 2017, but the second largest value market. USMEF’s strategies in 2019 will capitalize on growing interest in high-quality beef from consumers in Korea. Mexico, another priority market for the U.S. beef industry, was the second largest volume market and third largest value market for U.S. beef exports in 2017. U.S. beef holds dominant market share in this region, although uncertainty with NAFTA may threaten the U.S. position as a main beef supplier. As a result, USMEF’s strategies will focus on defending market share in this region. Finally, despite recently imposed tariffs on U.S. beef, China remains a new opportunity for export growth. Strategies targeting this market will focus on educating all sectors on the unique properties of U.S. beef and the diversified applications of alternative cuts.

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

Asia People Works	Regional Consultant	ASEAN
Exclamation Graphic	POS Production	ASEAN
Monica Regaspi	Regional Consultant	ASEAN
Melvin Ho	Regional Chef/Merchandiser	ASEAN
Talentnet Corp	Regional Consultant	ASEAN
Usaha	Travel Agency	ASEAN
Elizabeth Wunderlich	Regional Consultant	Caribbean
2050 Comunicaciones	Marketing and Logistics	Central America + DR
Arte en el Servicio de Alimentos	Marketing & Logistics	Central America + DR
Gomez Lee	Marketing & Logistics	Central America + DR
Grupo Campeon	Marketing & Logistics	Central America + DR
Hernandez Hermanos	Marketing & Logistics	Central America + DR
Irma Lucia Ruano Solares	Regional Consultant	Central America + DR
Pecuaría Exportadora	Marketing & Logistics	Central America + DR
Saul Bueso	Regional Consultant	Central America + DR
Servicios Logísticos y Auxiliares de Occidente	Marketing & Logistics	Central America + DR
GZ China Culinary Industry Assoc.	Chef Association	China/Hong Kong
Henan Shineway	Marketing & Logistics	China/Hong Kong
Min XU	Regional Consultant	China/Hong Kong
Rachel Deng	Foodservice Consultant	China/Hong Kong
Ren Yu	Marketing & Logistics	China/Hong Kong
Thousand Beyond Limited	Marketing & Logistics	China/Hong Kong
Monty Brown	Meat Consultant	Europe
T20 Media	Online Marketing	Europe
Alvis	Technical Translation	Japan
Dai Nippon	Printing	Japan
DeNA Travel	Travel Agency	Japan
Ei Publishing	POS Production	Japan
Eire Systems	IT Support	Japan
Hakuhodo	Agency	Japan
Image	Website Coordinator	Japan
IPSOS	Research Firm	Japan
JAC Japan	Employment Consultant	Japan
JTB Metropolitan	Travel Agency	Japan
Kinki Nippon Tourist	Travel Agency	Japan
ManPower Group	Dispatch Consultants	Japan
Rekids	Culinary PR	Japan
Sakaki Lab	Seasonal Publication Development	Japan
SP Ring	Marketing Agency	Japan

Tokyu Agency	Ad Agency	Japan
Topfield Marketing	Research/Publishing	Japan
ATOZ	Marketing & Logistics	Korea
Creative May	Ad/POS Production	Korea
Daymon-CDS Worldwide	In-store Promotions	Korea
Gooseul Hambak	Promotions	Korea
Greedeat	Promotions/Marketing	Korea
Haevichi	Promotions	Korea
HSIND	Booth Construction	Korea
Iji FHC	POS Production	Korea
KIM Terri Taekyong	PR Consultant	Korea
Korea Sauce	Sauce Manufacturer	Korea
MixNFix Co	Marketing & Logistics	Korea
Platcomm	Marketing & Logistics	Korea
Sharp Aviation	Travel Agency	Korea
Tae-Pyeong Salt	Seasoning Manufacturing	Korea
Timehurst	Consumer Events	Korea
Walk Company	Marketing & Logistics	Korea
Weber Shandwick	PR/Advertising	Korea
WithM	Retail Promotion/POS Production	Korea
Yujin Metro	Subway Advertising	Korea
Zestn	Cooking Classes	Korea
Alberto de Jesus Diaz Cadena	Translation	Mexico
Brand Synergy	Research	Mexico
Carat Mexicana	Media Agency	Mexico
Cerebro Kreativo	PR/Events	Mexico
Consultora de Servicios en Imagen	Marketing/Logistics Agency	Mexico
Cristian Zarabozo Enriquez de Rivera	Photography/Videography	Mexico
Ediciones del Norte	Marketing/POS Production	Mexico
Gomez Lee Marketing	Marketing/Logistics Services	Mexico
Grupo Arieliz	Promotional/POS Materials	Mexico
ITESM	Meeting Services	Mexico
Litografia Gil	Printing services	Mexico
M2	Booth Installation	Mexico
Operadora MeatBone	Promotions	Mexico
Pablo Chavarria Solorio	POS Material/Printing	Mexico
Promo Conceptos	Promotions	Mexico
Proyectos y Consultoria en Informatica	Research	Mexico
Sanborn Hermanos	Promotions	Mexico
Sylvia Basaldua Pohlenz	Graphic Design/Production	Mexico
Viajes El Corte Ingles	Travel Agency	Mexico
Agri Marketing International	Regional Consultant	Middle East

Arab Marketing & Finance, Inc.	Regional Consultant	Middle East
Sole Partnership V. Korupaev	Website Support	Russia & Region
Atlantic FS	Promotions	South America
Jessica Julca	Regional Representative	South America
Glaro	Marketing & Logistics	South America
Jorge Abella	POS Production	South America
Latone	Booth Installation	South America
Manya	Website Management	South America
Viviana Rodriguez	Regional Marketing Consultant	South America
Always Marketing	Marketing Agency	Taiwan
Bayshore	PR/Events	Taiwan
Focus Marketing	Social Media Marketing	Taiwan
General Innovation Services	Seminar Support	Taiwan
Target Exhibition Design	Booth Construction	Taiwan
Trend Young Marketing	PR/Events	Taiwan

4. Will all work with subcontractors be competitively bid?

Yes

If not, why not?

In agreement with USMEF's vendor selection policies, contracts greater than \$25,000 will undergo competitive bidding at least every three years. Selection will be based on qualifications and reasonableness of cost.

5. Please list any relationships between this AR and projects previously funded by the Operating Committee:

The FY19 AR is a continuation of the strategies and tactics outlined in the FY18 AR. Long-term, sustainable U.S. beef export growth is reliant on the combination of developing demand in existing and new markets, and is the result of compiled programs and activities focused on training, education, promotions, teams, improving relationships, etc.

DETAILED BUDGET SUMMARY**CBB/BPOC Funding Request:**

Committee	Tactic	Tactic Name	Funding Source	Direct	Implementation	Total
<i>Export Growth</i>	A	ASEAN- MD	BPOC	\$ 140,400	\$ 89,600	\$ 230,000
<i>Export Growth</i>	B	ASEAN- MA	BPOC	\$ 15,600	\$ 10,000	\$ 25,600
<i>Export Growth</i>	C	Caribbean- MD	BPOC	\$ 94,100	\$ 26,900	\$ 121,000
<i>Export Growth</i>	D	Caribbean-MA	BPOC	\$ 10,400	\$ 3,000	\$ 13,400
<i>Export Growth</i>	E	Central America - MD	BPOC	\$ 198,600	\$ 44,800	\$ 243,400
<i>Export Growth</i>	F	Central America - MA	BPOC	\$ 22,000	\$ 5,000	\$ 27,000
<i>Export Growth</i>	G	China/HK- MD	BPOC	\$ 309,900	\$ 380,700	\$ 690,600
<i>Export Growth</i>	H	China/HK- MA	BPOC	\$ 34,500	\$ 42,300	\$ 76,800
<i>Export Growth</i>	I	Europe- MD	BPOC	\$ 224,000	\$ 112,000	\$ 336,000
<i>Export Growth</i>	J	Europe-MA	BPOC	\$ 24,900	\$ 12,400	\$ 37,300
<i>Export Growth</i>	K	Japan- MD	BPOC	\$ 1,907,900	\$ 515,100	\$ 2,423,000
<i>Export Growth</i>	L	Japan- MA	BPOC	\$ 212,000	\$ 57,200	\$ 269,200
<i>Export Growth</i>	M	South Korea- MD	BPOC	\$ 766,200	\$ 331,400	\$ 1,097,600
<i>Export Growth</i>	N	South Korea- MA	BPOC	\$ 85,100	\$ 36,800	\$ 121,900
<i>Export Growth</i>	O	Mexico- MD	BPOC	\$ 662,800	\$ 268,700	\$ 931,500
<i>Export Growth</i>	P	Mexico- MA	BPOC	\$ 73,600	\$ 29,900	\$ 103,500
<i>Export Growth</i>	Q	Middle East- MD	BPOC	\$ 323,500	\$ 33,600	\$ 357,100
<i>Export Growth</i>	R	Middle East- MA	BPOC	\$ 35,900	\$ 3,700	\$ 39,600
<i>Export Growth</i>	S	Oceania-MD	BPOC	\$ 11,400	\$ 4,200	\$ 15,600
<i>Export Growth</i>	T	Russia- MD	BPOC	\$ 75,400	\$ 100,800	\$ 176,200
<i>Export Growth</i>	U	Russia- MA	BPOC	\$ 8,300	\$ 11,200	\$ 19,500
<i>Export Growth</i>	V	South America- MD	BPOC	\$ 150,300	\$ 22,400	\$ 172,700
<i>Export Growth</i>	W	South America- MA	BPOC	\$ 16,700	\$ 2,500	\$ 19,200
<i>Export Growth</i>	X	Taiwan- MD	BPOC	\$ 328,500	\$ 309,700	\$ 638,200
<i>Export Growth</i>	Y	Taiwan- MA	BPOC	\$ 36,500	\$ 34,500	\$ 71,000
<i>Export Growth</i>	Z	New Market Development	BPOC	\$ 43,100	\$ -	\$ 43,100
AR Totals				\$ 5,811,600	\$ 2,488,400	\$ 8,300,000

Federation of SBCs Funding Request: (Informational Only)

Committee	Tactic	Tactic Name	Funding Source	Direct	Implementation	Total
Export Growth	A	ASEAN- MD	Federation	\$ 6,300	\$ 4,000	\$ 10,300
Export Growth	B	ASEAN- MA	Federation	\$ 700	\$ 400	\$ 1,100
Export Growth	C	Caribbean- MD	Federation	\$ 4,200	\$ 1,200	\$ 5,400
Export Growth	D	Caribbean-MA	Federation	\$ 500	\$ 100	\$ 600
Export Growth	E	Central America - MD	Federation	\$ 8,900	\$ 2,000	\$ 10,900
Export Growth	F	Central America - MA	Federation	\$ 1,000	\$ 200	\$ 1,200
Export Growth	G	China/HK- MD	Federation	\$ 13,900	\$ 17,100	\$ 31,000
Export Growth	H	China/HK- MA	Federation	\$ 1,500	\$ 1,900	\$ 3,400
Export Growth	I	Europe- MD	Federation	\$ 10,000	\$ 5,000	\$ 15,000
Export Growth	J	Europe-MA	Federation	\$ 1,100	\$ 600	\$ 1,700
Export Growth	K	Japan- MD	Federation	\$ 85,600	\$ 23,100	\$ 108,700
Export Growth	L	Japan- MA	Federation	\$ 9,500	\$ 2,600	\$ 12,100
Export Growth	M	South Korea- MD	Federation	\$ 34,400	\$ 14,900	\$ 49,300
Export Growth	N	South Korea- MA	Federation	\$ 3,800	\$ 1,700	\$ 5,500
Export Growth	O	Mexico- MD	Federation	\$ 29,800	\$ 12,100	\$ 41,900
Export Growth	P	Mexico- MA	Federation	\$ 3,300	\$ 1,300	\$ 4,600
Export Growth	Q	Middle East- MD	Federation	\$ 14,500	\$ 1,500	\$ 16,000
Export Growth	R	Middle East- MA	Federation	\$ 1,600	\$ 200	\$ 1,800
Export Growth	S	Oceania-MD	Federation	\$ 600	\$ 200	\$ 800
Export Growth	T	Russia- MD	Federation	\$ 3,400	\$ 4,500	\$ 7,900
Export Growth	U	Russia- MA	Federation	\$ 400	\$ 500	\$ 900
Export Growth	V	South America- MD	Federation	\$ 6,700	\$ 1,000	\$ 7,700
Export Growth	W	South America- MA	Federation	\$ 800	\$ 100	\$ 900
Export Growth	X	Taiwan- MD	Federation	\$ 14,800	\$ 13,900	\$ 28,700
Export Growth	Y	Taiwan- MA	Federation	\$ 1,600	\$ 1,500	\$ 3,100
Export Growth	Z	New Market Development	Federation	\$ 1,900	\$ -	\$ 1,900
AR Totals				\$ 260,800	\$ 111,600	\$ 372,400

Other Funding Source(s): (Informational Only)

Committee	Tactic	Tactic Name	Funding Source	Direct	Implementation	Total
Export Growth	A	ASEAN- MD	USDA	\$ 115,930	\$ -	\$ 115,930
Export Growth	B	ASEAN- MA	USDA	\$ -	\$ -	\$ -
Export Growth	C	Caribbean- MD	USDA	\$ 96,015	\$ -	\$ 96,015
Export Growth	D	Caribbean-MA	USDA	\$ -	\$ -	\$ -
Export Growth	E	Central America - MD	USDA	\$ 82,100	\$ -	\$ 82,100
Export Growth	F	Central America - MA	USDA	\$ -	\$ -	\$ -

<i>Export Growth</i>	G	China/HK- MD	USDA	\$ 198,250	\$ -	\$ 198,250
<i>Export Growth</i>	H	China/HK- MA	USDA	\$ -	\$ -	\$ -
<i>Export Growth</i>	I	Europe- MD	USDA	\$ 162,950	\$ -	\$ 162,950
<i>Export Growth</i>	J	Europe-MA	USDA	\$ -	\$ -	\$ -
<i>Export Growth</i>	K	Japan- MD	USDA	\$ 1,590,470	\$ -	\$ 1,590,470
<i>Export Growth</i>	L	Japan- MA	USDA	\$ 30,000	\$ -	\$ 30,000
<i>Export Growth</i>	M	South Korea- MD	USDA	\$ 528,690	\$ -	\$ 528,690
<i>Export Growth</i>	N	South Korea- MA	USDA	\$ 20,000	\$ -	\$ 20,000
<i>Export Growth</i>	O	Mexico- MD	USDA	\$ 267,885	\$ -	\$ 267,885
<i>Export Growth</i>	P	Mexico- MA	USDA	\$ -	\$ -	\$ -
<i>Export Growth</i>	Q	Middle East- MD	USDA	\$ 164,610	\$ -	\$ 164,610
<i>Export Growth</i>	R	Middle East- MA	USDA	\$ -	\$ -	\$ -
<i>Export Growth</i>	S	Oceania-MD	USDA	\$ -	\$ -	\$ -
<i>Export Growth</i>	T	Russia- MD	USDA	\$ 78,275	\$ -	\$ 78,275
<i>Export Growth</i>	U	Russia- MA	USDA	\$ -	\$ -	\$ -
<i>Export Growth</i>	V	South America- MD	USDA	\$ 36,580	\$ -	\$ 36,580
<i>Export Growth</i>	W	South America- MA	USDA	\$ -	\$ -	\$ -
<i>Export Growth</i>	X	Taiwan- MD	USDA	\$ 213,040	\$ -	\$ 213,040
<i>Export Growth</i>	Y	Taiwan- MA	USDA	\$ -	\$ -	\$ -
<i>Export Growth</i>	Z	New Market Development	USDA	\$ -	\$ -	\$ -
AR Totals				\$ 3,584,795	\$ -	\$ 3,584,795

Total Cost Summary for All Funding Sources: (Informational only)

Committee	Tactic	Tactic Name	Funding Source	Direct	Implementation	Total
<i>Export Growth</i>	A	ASEAN- MD	All	\$ 262,630	\$ 93,600	\$ 356,230
<i>Export Growth</i>	B	ASEAN- MA	All	\$ 16,300	\$ 10,400	\$ 26,700
<i>Export Growth</i>	C	Caribbean- MD	All	\$ 194,315	\$ 28,100	\$ 222,415
<i>Export Growth</i>	D	Caribbean-MA	All	\$ 10,900	\$ 3,100	\$ 14,000
<i>Export Growth</i>	E	Central America - MD	All	\$ 289,600	\$ 46,800	\$ 336,400
<i>Export Growth</i>	F	Central America - MA	All	\$ 23,000	\$ 5,200	\$ 28,200
<i>Export Growth</i>	G	China/HK- MD	All	\$ 522,050	\$ 397,800	\$ 919,850
<i>Export Growth</i>	H	China/HK- MA	All	\$ 36,000	\$ 44,200	\$ 80,200
<i>Export Growth</i>	I	Europe- MD	All	\$ 396,950	\$ 117,000	\$ 513,950
<i>Export Growth</i>	J	Europe-MA	All	\$ 26,000	\$ 13,000	\$ 39,000
<i>Export Growth</i>	K	Japan- MD	All	\$ 3,583,970	\$ 538,200	\$ 4,122,170
<i>Export Growth</i>	L	Japan- MA	All	\$ 251,500	\$ 59,800	\$ 311,300
<i>Export Growth</i>	M	South Korea- MD	All	\$ 1,329,290	\$ 346,300	\$ 1,675,590
<i>Export Growth</i>	N	South Korea- MA	All	\$ 108,900	\$ 38,500	\$ 147,400
<i>Export Growth</i>	O	Mexico- MD	All	\$ 960,485	\$ 280,800	\$ 1,241,285

<i>Export Growth</i>	P	Mexico- MA	All	\$ 76,900	\$ 31,200	\$ 108,100
<i>Export Growth</i>	Q	Middle East- MD	All	\$ 502,610	\$ 35,100	\$ 537,710
<i>Export Growth</i>	R	Middle East- MA	All	\$ 37,500	\$ 3,900	\$ 41,400
<i>Export Growth</i>	S	Oceania-MD	All	\$ 12,000	\$ 4,400	\$ 16,400
<i>Export Growth</i>	T	Russia- MD	All	\$ 157,075	\$ 105,300	\$ 262,375
<i>Export Growth</i>	U	Russia- MA	All	\$ 8,700	\$ 11,700	\$ 20,400
<i>Export Growth</i>	V	South America- MD	All	\$ 193,580	\$ 23,400	\$ 216,980
<i>Export Growth</i>	W	South America- MA	All	\$ 17,500	\$ 2,600	\$ 20,100
<i>Export Growth</i>	X	Taiwan- MD	All	\$ 556,340	\$ 323,600	\$ 879,940
<i>Export Growth</i>	Y	Taiwan- MA	All	\$ 38,100	\$ 36,000	\$ 74,100
<i>Export Growth</i>	Z	New Market Development	All	\$ 45,000	\$ -	\$ 45,000
AR Totals				\$ 9,657,195	\$ 2,600,000	\$ 12,257,195

Summary of Prior Year Budget:	FY 2018 Approved Budgets						
	CBB/BPOC	FSBCs	Other Source(s)	Total	Direct Cost	Impl.	Total
AR Total	\$ 7,360,919	\$ 1,607,400	\$ 3,751,266	\$ 12,719,585	\$ 10,119,585	\$ 2,600,000	\$ 12,719,585

Summary of Prior Year Actual Expenses:	FY 2018 Actual Expenses (through April 30, 2018)						
	CBB/BPOC	FSBCs	Other Source(s)	Total	Direct Cost	Impl.	Total
AR Total	\$ 3,173,622	\$ -	\$ -	\$ 3,173,622	\$ 1,451,389	\$ 1,722,233	\$ 3,173,622

Historical Summary of Budgets and	Total Approved Budgets			Total Actual Expenses		
	FY 2017	FY 2016	FY 2015	FY 2017	FY 2016	FY 2015
AR Total	\$ 8,987,900	\$ 9,967,500	\$ 9,415,200	\$ 2,778,281	\$ 9,922,202	\$ 9,339,456