



Funded by the Beef Checkoff.

BEEF NEVER BACKS DOWN

CATTLEMEN'S BEEF BOARD 2020 ANNUAL REPORT



Funded by the Beef Checkoff.

Cattlemen's Beef Board

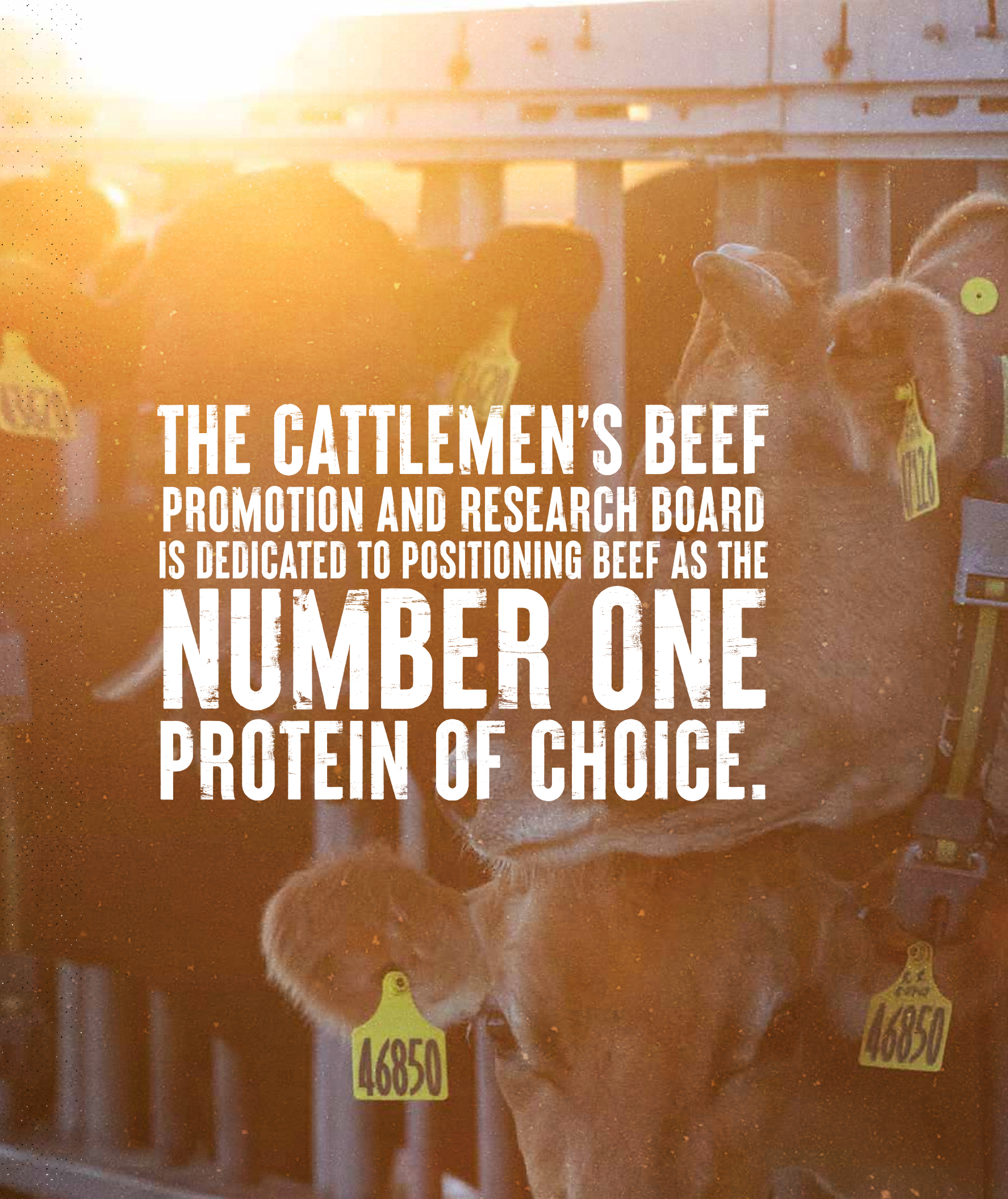
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BeefBoard.org/AnnualReport



THE CATTLEMEN'S BEEF PROMOTION AND RESEARCH BOARD IS DEDICATED TO POSITIONING BEEF AS THE NUMBER ONE PROTEIN OF CHOICE.

The Cattlemen's Beef Promotion and Research Board, usually referred to as the Cattlemen's Beef Board (CBB), along with the United States Department of Agriculture (USDA), oversees the Beef Checkoff program which was established in the Beef Promotion and Research Act as part of the 1985 Farm Bill. CBB manages the collection of \$1 per head on all cattle sold in the U.S. and \$1 per head equivalent on imported cattle, beef and beef products. CBB is also responsible for approving the annual Beef Checkoff budget for its national Checkoff-funded programs.

The Beef Board includes 99 dedicated members representing every beef industry segment, including cow/calf, stocker, feedlot, veal and dairy operations, as well as importers of beef and beef products. Members are nominated by certified nominating organizations and appointed by the Secretary of Agriculture to serve non-paid, three-year terms. The number of board members representing a state is determined by the total number of cattle in that state or region, with 500,000 head earning each state its first board member and 1,000,000 head for each additional member. Importer numbers are established in the same manner, using a per-head equivalent.

The appointed CBB members have the opportunity to serve on Checkoff Program Committees, Administrative Committees, the Evaluation Advisory Committee, as well as the Beef Promotion Operating Committee. CBB Checkoff program committees are comprised of approximately 20 CBB members and 20 members of the Federation of State Beef Councils. Together, these committed producers and importers determine the funding given to Beef Checkoff contractors and their projects every September.

The Checkoff program was designed to increase demand for beef and beef products by stimulating restaurants and grocery stores to sell more beef and encouraging consumers throughout the world to buy more beef. This is accomplished through consumer beef advertising, extensive research to improve beef quality and environmental sustainability, marketing partnerships, public relations, educational opportunities and new product development.

The Beef Checkoff keeps beef top of mind with consumers, restaurants, butchers and other food retailers. It also reaches out to educators, dietitians, medical personnel and other influencers. By law, Checkoff funds cannot be used to influence government policy or action, including lobbying. The Beef Checkoff does not own cattle, packing plants or retail outlets. It cannot control prices or single-handedly turn around a bad market.



BEEF NEVER BACKS DOWN

What I appreciate about our resilient industry is that we just keep at it, day after day, month after month, raising cattle and providing beef around the world. Yet this year has been rough. No one saw massive fires, floods or drought, let alone a worldwide pandemic on the radar for 2020, and yet, when those things happened, beef farmers and ranchers continued to do what they do best: work hard to provide a top quality, safe, consistent protein to the center of our plates. We met the challenge toe to toe, and didn't back down.

The Beef Checkoff's role as a producer-led promotion, research and educational program around all things beef – at both the state and national level – help advance beef to a top protein of choice. Despite packing plant issues at the start of the COVID-19 crisis, consumer demand for beef skyrocketed to levels unseen in recent memory. When faced with a choice of what to prepare for dinner at home, beef ruled the day. That sentiment and support for our product are the direct results of the Beef Checkoff's three-and-a-half decades of hard work building beef demand.

As chair of the Cattlemen's Beef Board, I witnessed how our programs had to morph and change this year to meet our new challenges. In-person educator trainings moved to virtual platforms, allowing thousands to attend. Our beef marketing promotions shifted to at-home recipes and videos to help consumers cook all that beef they purchased at grocery stores. Research refocused on how restaurants were changing their business models to deliver high-quality proteins to their customers, even when their front doors were closed.

We are proud of the work our volunteer cattlemen and women at the Cattlemen's Beef Board did alongside our Beef Checkoff contractors. Their ability to pivot their programs to continue to meet the needs of beef eaters around the globe shows our true resilience in tough times.

JARED BRACKETT
2020 Cattlemen's Beef Board Chair



CONTRACTORS KEY

AFBFA

American Farm
Bureau Foundation
for Agriculture

NCBA

National Cattlemen's
Beef Association

CBB

Cattlemen's
Beef Board

NEBPI*

Northeast Beef
Promotion Initiative

FMPRE

Foundation for Meat
and Poultry Research
and Education

NIAA*

National Institute for
Animal Agriculture

KSU*

Kansas State
University

NLPA

National Livestock
Producers
Association

MICA

Meat Import Council
of America

USCA

United States
Cattlemen's
Association

NAMI

North American
Meat Institute

USMEF*

United States Meat
Export Federation

**Subcontractor figures presented within this report are based on data compiled by individual contractors. Unless indicated otherwise, results are based on October 1, 2019 to September 30, 2020 data.*



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Includes advertising, merchandising and new product development, as well as training and promotional partnerships with restaurants and supermarkets to stimulate beef and veal sales.

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Develops international markets for U.S. beef through programs to expand market penetration, gain new market access, improve global consumer perceptions and build trust in U.S. beef.

CONSUMER INFORMATION ■ 19 - 22

Helps enhance beef's image by sharing nutritional data and other positive messages with media, food editors, dietitians, physicians and others who influence consumers' food knowledge.

INDUSTRY INFORMATION ■ 23 - 26

Strives for an accurate understanding of the beef and veal industries and helps maintain a positive cattle-marketing climate.

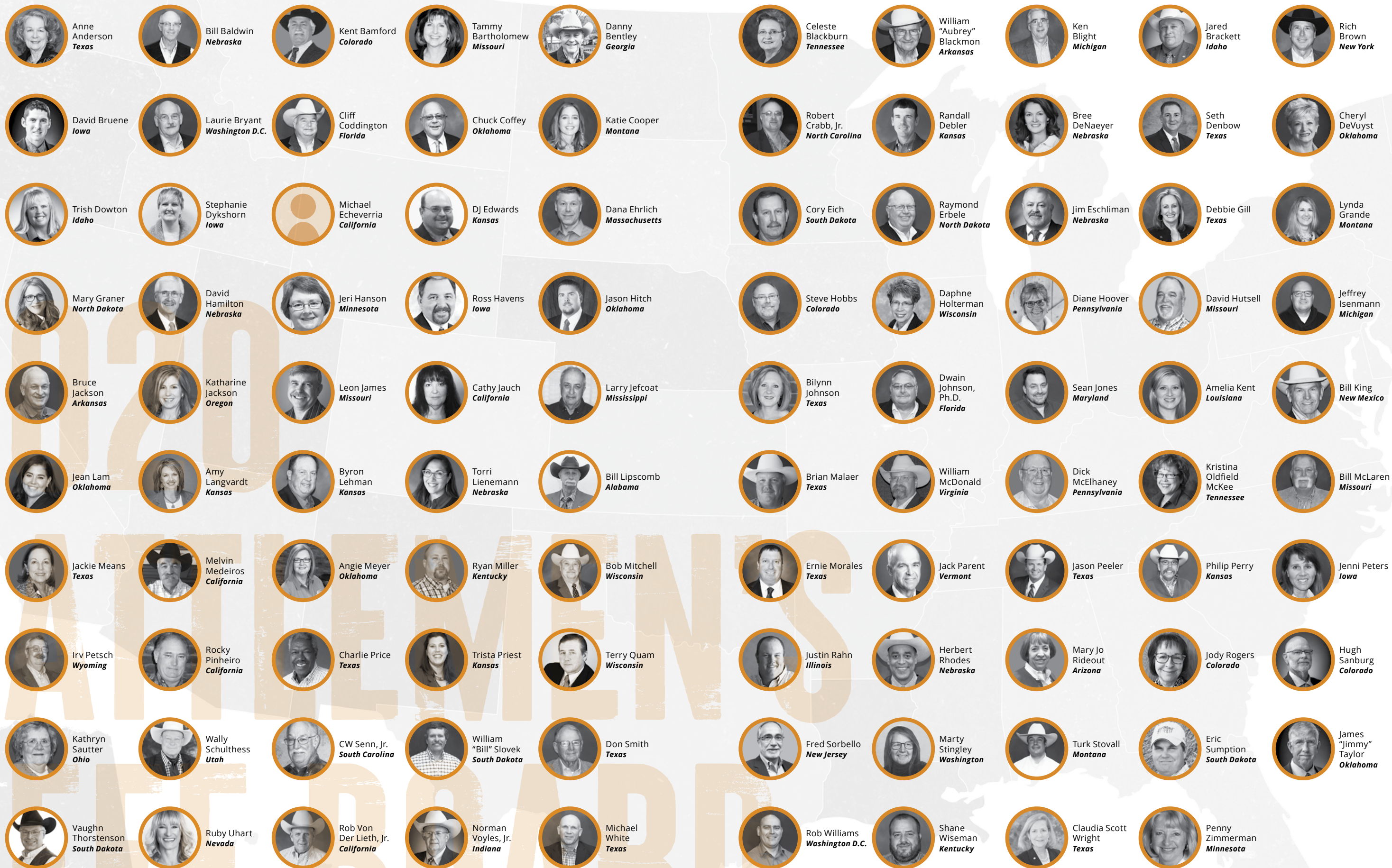
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Provides the foundation for virtually all Beef Checkoff-funded information and promotion by providing the science related to beef nutrition, beef safety and pathogen resistance.

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PROMOTION

The Promotion program develops and executes new approaches to connect directly with consumers in meaningful ways, so they can feel confident purchasing the beef and veal products they enjoy. Promotion efforts broadcast beef's powerhouse taste and nutrients while also bringing attention to the hardworking men and women who raise beef for the world.



NCBA

BEEF. IT'S WHAT'S FOR DINNER. MEETS CHANGING CONSUMER NEEDS

In the middle of a global pandemic, Checkoff-funded *Beef. It's What's For Dinner.* quickly developed new content and strategies to meet changing consumer needs, including:

- Sharing and promoting content designed to help consumers prepare beef meals at home. Extensive content libraries, including ads, recipes, cooking videos and educational materials about beef nutrition and beef safety were updated and leveraged. This content was widely distributed on social media and via press releases.
- Partnering with three nationally recognized chefs to launch a “Beef Substitutes” campaign. Each chef found a creative way to substitute beef for a more commonly used protein in one of their favorite dishes. The fun and high energy campaign was extended via news and social media outreach.
- Kicking off grilling season with a Memorial Day weekend video highlighting how beef producers are working to keep beef on grills. Other efforts included working with National Calendar Day to designate May 28 as National Beef Burger Day and releasing a new summer grilling campaign, “United We Steak,” to showcase 50 steaks and all 50 states.

RESULTS:

By highlighting beef's great taste through ads, digital efforts and engaging campaigns, these programs encouraged consumers to both purchase beef and feel confident enjoying its many positive attributes. *Beef. It's What's For Dinner's.* “United We Steak” campaign reached more than 283 million consumers through paid advertising, social media, earned media and influencer outreach. Social media alone drove more than one million website pageviews to UnitedWeSteak.com.

NAMI**THE CHECKOFF PREPARES HEALTH PROFESSIONALS TO BECOME BEEF ADVOCATES**

Through Beef Checkoff efforts, Registered Dietitian Nutritionists (RDNs) and health bloggers were empowered to speak up and advocate beef to their clients and followers.

- The Beef Checkoff sponsored 23 television talk show segments where RDNs provided information on the nutritional benefits and great taste of prepared beef products and showed viewers creative and delicious ways to enjoy these products, including Beefshi.
- The Beef Checkoff worked with 22 of the top nutrition bloggers in the country to develop videos and content focused on Beefshi. In light of the pandemic, bloggers updated their messaging and approach. For example, many focused on enjoying Beefshi as a family activity while at home instead of going to a sushi restaurant.

RESULTS:

Consumers trust their RDNs' and nutrition bloggers' opinions and actively seek out their recommendations on food choices. Having these health professionals advocate prepared beef's positive attributes contributes to confidence in beef and prepared beef product sales. The talk show segments had an estimated reach of 15 million consumers.

**NAMI****EDUCATION PROGRAM SPOTLIGHTS
BEEF IN THE CLASSROOM**

NAMI successfully developed a prepared beef education pilot program for classrooms ranging from grade school to grad school. The program was implemented in dozens of schools in New York and Pennsylvania, where hundreds of students participated in a classroom exercise to create their own Beefshi recipe. Following the pilot program, NAMI is now poised to grow these programs nationally. Additionally, NAMI designed a Beefshi Chefs' Battle at the New Orleans Culinary & Hospitality Institute.

RESULTS:

Showing educators and students how to serve prepared beef products with a new twist encourages creative thinking on how to integrate beef into meals. More than 500 grade school students participated in the Beefshi in the classroom project, and the Beefshi Chefs' Battle reached approximately 5,000 culinary students and professional chefs.

NAMI**TIKTOK'S MOST VIRAL BEEF CAMPAIGN EVER**

To demonstrate how prepared beef is an essential part of our culture in good times and bad, and to reach a younger consumer audience, NAMI organized a #WienerWednesday hot dog campaign throughout July. Beef hot dog recipes were developed by the Food Renegades, a division of The Digital Renegades, a digital marketing agency and a chef alliance on TikTok, in partnership with the National Hot Dog and Sausage Council and Beef Checkoff. The Food Renegades' drool-worthy creations inspired hot dog fans to show their creativity and develop their own videos featuring a unique beef hot dog recipe using the hashtag #WienerWednesday.

RESULTS:

Forty unique recipes and fun facts about hot dogs were viewed more than 27 million times, generating nearly 3.5 million likes and 15.8 million hashtag views, making it the most viral beef campaign ever organized on TikTok. This is a major step toward engaging and promoting prepared meats in fun and interactive ways with millennials and Generation Z, both key consumer audiences.

**NAMI****TRANSFORMING VEAL'S CONSUMER EDUCATION**

NAMI identified veal consumption's biggest barrier of entry for millennials through research: low awareness and lack of understanding of veal's nutritional and taste benefits. To overcome this, veal promotional programs and communication platforms focused on creating awareness, educating consumers and driving sales for veal. Enlisting prominent food bloggers and online retailers was one way NAMI drove millennial veal demand.

- Food bloggers used the "Veal for Valentine's Day" promotion to educate their followers on how veal is raised and stimulate interest by creating an exciting veal recipe for Valentine's Day.
- The Summer Grilling promotion highlighted the different cuts of veal that are best for grilling, where to purchase those cuts and a summer grilling recipe.
- A first-time online retailer event for veal with the Fresh Direct online grocery service featured online promotions on the veal shopping page and branded banner ads running across the Fresh Direct website with links to the veal shopping page. A dedicated blog post on the website also featured a Checkoff-funded veal recipe.

RESULTS:

Recipe development and food blogger partnerships helped identify new and emerging trends to target the millennial audience. Creating and driving positive messaging by distributing content and collaborating with industry leaders and State Beef Council partners has contributed to a positive shift in consumer attitudes toward and acceptance of veal. More than one million consumers engaged with the veal promotion efforts.



FOREIGN MARKETING

The Foreign Marketing program maximizes market access in international markets for U.S. beef by expanding market penetration, gaining new market access, improving global consumer perceptions and building trust in U.S. beef.

USMEF*

BUILDING RELATIONSHIPS AND PROVIDING GOODWILL SUPPORT

As COVID-19 began impacting country after country during the first few months of 2020, U.S. Meat Export Federation (USMEF) adapted its programs worldwide to provide immediate support to trade partners. With in-country staff and Beef Checkoff support, USMEF was able to help foodservice partners develop new means of food delivery and takeaway. In some markets, USMEF staff participated in re-engineering menus and developing and using online platforms for ordering and delivery logistics. USMEF also initiated unique promotional campaigns for U.S. beef and produced new delivery materials.

RESULTS:

Strong foodservice partnerships allow the Beef Checkoff to encourage beef sales in key export markets and emphasize U.S. beef integrity.

USMEF*

CAPITALIZING ON OPPORTUNITIES IN CHINA

Market development programs paid dividends in China as expanded market access and protein supply constraints contributed to rising interest in U.S. beef and strong export growth. Tight supplies in Australia and African Swine Fever's impact on domestic pork prices also helped turn buyers' attention to high-quality U.S. beef.

With Beef Checkoff Program support, U.S. beef was in a position to capitalize on new opportunities in China despite the impact of COVID-19. When social restrictions were implemented, U.S. Meat Export Federation (USMEF) shifted the weight of its educational and promotional programs toward e-commerce and social media to directly reach consumers at home. By mid-year, as restrictions were lifted, USMEF reignited promotions for U.S. beef with several partners in retail and foodservice.

RESULTS:

Thanks in part to these Checkoff-funded promotional programs, U.S. beef exports to China reached \$130 million through September 2020, a 136-percent increase over levels from one year ago.

USMEF***GROWING MARKET SHARE
IN SOUTH KOREA**

While South Korea's retail sector was able to adapt to changes brought on by COVID-19, the foodservice sector struggled under the weight of social distancing guidelines and ongoing consumer concerns about sit-down dining. With support from the Beef Checkoff, USMEF adjusted its programs to work directly with foodservice partners on campaigns that utilized e-commerce, delivery platforms and social media support. One such marketing promotion was called "Delivery Week" and involved a dozen craft burger restaurant chains.

RESULTS:

U.S. beef set a monthly record for exports to Korea in August and continues displacing Australian beef in the market. Social media reached 730,000 consumers during the "Delivery Week" promotion for U.S. beef in South Korea.

USMEF***"GO BEEF" MOBILE CAMPAIGN
PROPELS U.S. BEEF IN TAIWAN**

As restaurants in Taiwan began closing in April and restrictions related to promotions and in-store demonstrations impacted retail outlets, USMEF developed a new campaign to keep U.S. beef top of mind with consumers. Supported by the Beef Checkoff, "Go Beef" was a summer-long campaign that added a mobile component to support retail promotions and directly reach consumers. In addition to mobile carts for neighborhood food tastings, USMEF utilized a "restaurant-concept" truck to visit urban areas where large numbers of people would see and learn about U.S. beef. When opened, the truck featured a restaurant design with U.S. beef imagery and video panels that showed chefs preparing U.S. beef dishes. The campaign was also intended to show support for the foodservice sector by reminding consumers about the joy of restaurant dining.

RESULTS:

U.S. beef exports to Taiwan set a monthly record in August. Retail demand has remained strong as Taiwan's imports of chilled U.S. beef increased 15 percent through August, bringing U.S. beef to a 75 percent market share.



**U.S. BEEF
SET A MONTHLY
RECORD
FOR EXPORTS TO
KOREA
AND TAIWAN
IN AUGUST 2020**

CONSUMER INFORMATION

The Consumer Information program develops nutritional data and other information that will help consumers and others form opinions and make decisions regarding the purchase, preparation and consumption of beef and beef products. Efforts include consumer education and information, communications with health professionals, food and nutrition communicators, retailers and foodservice professionals.

NCBA

BEEF. IT'S WHAT'S FOR DINNER. PARTNERS WITH TEXAS ROADHOUSE AND CHICORY

To educate consumers and the supply chain on how beef is responsibly raised and highlight beef community members, *Beef. It's What's For Dinner.* began a multi-faceted project with foodservice operator and steakhouse, Texas Roadhouse. Beef's product and production information were shared via email, Texas Roadhouse's social media channels and their website. Other supply chain engagement and outreach included an e-commerce campaign with a third-party partner, Chicory, which made numerous beef recipes on recipe sites across the internet "shoppable" so consumers could add the beef from those recipes right into their online grocery carts.

RESULTS:

Chicory data showed 250 *Beef. It's What's For Dinner.* recipe items being added to consumers' shopping carts per week.

NCBA

BEEF SPOTLIGHTED IN TOP CONSUMER PUBLICATIONS

The media relations team secured numerous national stories to promote beef. Over the holiday season, the famous Beef Driol Log was featured in numerous outlets including *AdWeek*, *The Wall Street Journal* and *The New York Times*. During the summer grilling season, the team secured a "steak swap" story on FoxNews.com and a burger cooking demonstration on GoodMorningAmerica.com.

To kick off the summer grilling season, the Checkoff-funded "United We Steak" campaign connected producers and consumers in their love of beef. This multi-pronged campaign encouraged consumers to cook beef on the grill and serve up beef recipes all summer long. This campaign secured two cooking demonstrations on GoodMorningAmerica.com and included a satellite media tour, which resulted in more than 20 interviews with TV and radio stations across the country. The team also pitched and secured a story in *People* magazine showcasing rancher and beef advocate Kiah Twisselman's weight-loss journey and highlighting the role beef plays in her diet. That story went viral and was shared on *Good Morning America* and other outlets across the globe.

RESULTS:

Consumers saw first-hand that beef can be a protein staple in any weight-loss journey. The media exposure of Kiah Twisselman's story had an estimated reach of 1.5 billion.

AFBFA**EDUCATORS LEARN ABOUT BEEF PRODUCTION**

2020 was filled with challenges, barriers and constraints for school districts. The Beef Checkoff saw these challenges as opportunities to meet teachers where they were – in search of high quality remote professional development and free educational resources. Two livestream events discussed how the beef production process provides an excellent context for exploring science. Teachers learned how selective breeding and genetics can be used to meet human needs and how cattle interact within a grassland ecosystem. Educators from the top 10 largest school districts in the U.S. engaged with the livestream events, including teachers from New York City, Chicago and Los Angeles, along with representation from more than 800 other school districts across the nation. Teachers were also given the opportunity to attend On The Farm STEM virtual experiences. During the virtual September event, teachers toured the Ruskamp feedlot near Dodge, NE and Dr. Chris Calkins’ meat lab at the University of Nebraska-Lincoln. During the event, AFBFA highlighted all of its beef resources and hosted a workshop with attendees to figure out ways to implement those materials in their classrooms.

RESULTS:

Throughout 2020, the Beef Checkoff’s support helped AFBFA’s network expand to nearly 1,500 teachers and developed new partnerships to include several universities, beef producers and several state beef councils.

**MICA/NEBPI*****NORTHEAST CONSUMERS ENCOURAGED TO “EAT WHAT YOU CRAVE”**

The Beef Checkoff partnered with Fresh Direct, a New York City-based online grocer and meal kit delivery company, on the 4th of July and Labor Day holiday weekends. Fresh Direct’s beef campaign, “Eat What You Crave,” was strategically launched on their website to target consumers who buy both plant-based and animal proteins. The campaign spoke simply to beef’s overall “crave-ability” through beef recipe images, focusing on specific beef cuts and a Korean Beef Bibimbap recipe from *Beef. It’s What’s For Dinner*.

RESULTS:

More than 498,000 consumers were reached during this campaign. Over Labor Day, beef sales increased four percent while beef units increased 12 percent.

INDUSTRY INFORMATION

The Industry Information program maintains an accurate understanding of the beef industry and helps promote a positive cattle-marketing climate through information dissemination. These efforts work to develop new markets, marketing strategies and increase efficiency and activities through programs focused on issues, management, public relations and beef and veal quality assurance.

NAMI

WEBINAR HIGHLIGHTS DAIRY PRODUCERS' ROLE IN PRODUCING HEALTHY VEAL CALVES

An educational webinar, "Veal from Farm to Fork," attracted more than 100 stakeholders in education, government and allied industries related to beef and dairy. The webinar explained the veal industry, how veal is raised today and the interrelationship between the beef and dairy industries. *Progressive Dairy* magazine wrote a follow-up article on the webinar, including information about how dairy producers can ensure veal calf health and follow common veal production practices.



RESULTS:

A follow-up survey showed 86 percent of attendees rated the webinar as exceptional. When asked about their confidence in the quality of care for veal calves, 73 percent were confident in what they learned through the webinar.

NLPA/NIAA***SHOWING BEEF PRODUCERS THE IMPORTANCE OF COMMUNICATION**

At the 9th annual Antibiotic Symposium, funded in part by the Beef Checkoff, beef producers joined veterinarians, animal health professionals and additional animal agriculture leaders to learn, collaborate and develop solutions to become better stewards of antibiotics while combating antimicrobial resistance. This year's symposium studied how the industry can better communicate to the public effectively and positively. Presentations and a hands-on workshop developed in partnership with the Iowa State University Greenlee School of Journalism and Communication helped attendees understand how to take science updates and new advances in research, technology and innovation and convey that useful information to consumers.

RESULTS:

Beef producers had the opportunity to meet with key influencers from CDC, USDA, FDA and others. This one-on-one collaboration encouraged dialogue and created a better understanding of how beef production plays into the conversation of both human and animal health.

NCBA**BQA ACHIEVES ACCEPTANCE ACROSS BEEF INDUSTRY AND CONSUMER AUDIENCES**

Beef Quality Assurance (BQA) is a foundational program that connects cattle production practices with beef safety and quality, and it continues to grow in popularity and certifications. BQA's new resources, like the latest version of its online certification modules, helped increase total verifiable certifications and equivalents (dairy and youth-focused programs) to 483,141. BQA's high level of certifications and program growth over the past five years have allowed it to reach consumers through a promotional and advertising campaign that explained how beef is produced.

RESULTS:

Nearly 33 percent of all verifiable certifications came in 2020.

**NCBA****BEEF ADVOCATES SHARE BEEF'S STORY**

The Beef Checkoff's Masters of Beef Advocacy (MBA) program continued to have increased participation from advocates in email and social media campaigns. Additionally, the Beef Advocacy Training and Engagement (BATE) team trained more than 5,400 people at 40 events, and presentations, giving them the tools to address consumer questions and concerns about beef. The BATE team focused on more targeted communications with specific advocate activations to help disseminate beef-related information to consumers and actively ensure consumer confidence in beef.

RESULTS:

This year more than 2,700 advocates graduated from the MBA program, adding to the ever-expanding group of advocates focused on sharing beef's story.

RESEARCH

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

USCA/KSU*

MEAT DEMAND MONITOR UNCOVERS KEY PANDEMIC INSIGHTS

Funded in part by the Beef Checkoff, the Meat Demand Monitor issued its first-ever multi-month report, leveraging more than 10,000 survey responses spanning from February to June 2020. The data collected provided valuable insight into consumer purchasing behaviors, including several key trends on beef demand and consumption during the COVID-19 pandemic:

- Grocery beef demand peaked in April, while foodservice beef demand was lowest in April.
- Taste, freshness, safety and price are persistently the most important factors in protein purchasing decisions, with price increasing in importance since the pandemic began.
- The fast-casual category across restaurant groups gained share, perhaps reflecting drive-thru or curbside capabilities, while the local independent category lost share.

RESULTS:

The Beef Checkoff can use the information collected from this survey to make informed decisions on where and how to invest future Checkoff dollars.

FMPRE**DEMONSTRATING PREPARED BEEF'S ROLE IN A HEALTHY DIET**

The Beef Checkoff is working to position beef as a healthy option for any lifestyle. One way to do so is by investing Checkoff dollars into prepared beef nutrition research. One specific FMPRE white paper, *A Guide to Meat Processing for the Nutrition Community*, serves as a guide for nutrition experts and the scientific community. This white paper assesses how meat is processed, common categories of processed meats and their characteristics, the meaning of different labeling claims and an overview of the nutritional benefits of meat consumption and public health implications. Simply, this white paper shows all the ingredients used in prepared beef products, why they are used, how they're safe and why they're processed in a certain capacity to ensure food safety.

**RESULTS:**

A greater understanding of the science of prepared beef products will help demonstrate their role in a healthy and balanced diet. The white paper was submitted to the 2020 Dietary Guidelines Advisory Committee, subsequently approved by the Beef Checkoff and distributed to the key opinion leaders in the nutrition community.

FMPRE**POST-HARVEST BEEF RESEARCH ENSURES BEEF SAFETY**

The Checkoff's post-harvest safety research program identifies and improves science-based interventions and process controls to ensure beef safety, which maintains and bolsters consumer trust in and demand for beef. Four post-harvest beef safety research priorities addressed topics like outbreak investigations on E.coli, the efficacy of common antimicrobial interventions and improving validation methods for salmonella lethality.

RESULTS:

Foodborne illness outbreaks from beef products substantially reduce consumer confidence, which in turn has a significant negative impact on channel market demand and live cattle prices. The primary accomplishment of the post-harvest beef safety this year was continuing to build the body of scientific evidence available to meatpackers, processors and others in the marketing chain to help ensure the safety of beef products.

NCBA**NATIONAL BEEF TENDERNESS SURVEY UNDERWAY**

This year marked the initiation of the National Beef Tenderness Survey, a benchmark study completed every five years that documents tenderness improvements the industry has made over time. Following the study, outreach to all sectors of the supply chain will occur to report improvements in tenderness and address challenges and inconsistencies.

RESULTS:

Checkoff-funded product quality research fills a unique need to revolutionize beef and explore better carcass utilization and fabrication to increase beef's value proposition. Flavor enhancement efforts have built upon findings from previous Checkoff-funded studies and are gaining recognition in scientific and industry communities.

NCBA**SHOWING BEEF'S ENVIRONMENTAL LIFECYCLE**

One of the Sustainability Research and Scientific Affairs program's cornerstone projects is the beef environmental lifecycle assessment. This year marked the completion of an updated assessment that will be published in 2021. This study will be used as a benchmark for improvements in beef's environmental assessment and also identifies areas for improvement moving forward.

RESULTS:

Checkoff-funded beef sustainability research provides science-based evidence to inform and engage industry stakeholders about beef's sustainability.

NCBA**IDENTIFYING CONSUMER PURCHASING BEHAVIORS**

Channel intelligence gathers data on consumers, retail and foodservice. It provides key insights into what the consumer is purchasing and how much. During the unprecedented market disruption caused by the COVID-19 pandemic, this research effort provided monitoring to show beef sales at retail with increased demand compared to pre-pandemic and the drastic decline and slow recovery of beef demand at foodservice. Also, through the COVID-19 pandemic, additional insights about consumer online grocery and meal-ordering habits and their "stocking-up" behaviors provided insights to new opportunities for beef.

RESULTS:

Audiences want an accurate and reliable source for information about beef and competing proteins purchased in the retail and foodservice channels. This research gathers retail scanner data, menu trends and other data subscriptions to supply information that enables national and state Checkoff programs to monitor consumer purchasing trends and identify other program opportunities.



PRODUCER COMMUNICATIONS

The Producer Communications program relays how Beef Checkoff dollars are allocated, shares investment results, highlights program successes and builds understanding of Checkoff roles, responsibilities and processes to producer stakeholders.

CBB

THE DRIVE REACHES NEW HEIGHTS

Sharing the successes of Checkoff-funded programs and activities is at the heart of the Producer Communications program. Through multiple initiatives and a variety of formats, the Producer Communications team communicates all national efforts funded under the Beef Checkoff and shows how the Checkoff is investing producer dollars to successfully drive demand for beef. One of those initiatives is *The Drive* publishing platform. Through this multi-faceted platform, the CBB shares recent efforts and outcomes of projects funded with Beef Checkoff dollars. Producers can subscribe to complimentary quarterly print and monthly e-newsletter editions of *The Drive*, bringing important information directly to their mailboxes or inboxes. *The Drive* quarterly print newsletter is an award-winning publication and was recognized with NAMA and Livestock Publication Council awards in 2020. Both editions feature regular updates from Qualified State Beef Councils, providing producers with a beneficial mix of state and national Checkoff news. All stories and updates from *The Drive* are hosted on DrivingDemandForBeef.com and promoted on multiple social media platforms. Through these efforts, producers are learning in many ways how their Checkoff investment is being put to work for the industry.



RESULTS:

Between its printed and e-newsletter subscriptions, *The Drive* now reaches nearly 100,000 producers multiple times a year.



FY2020 FINANCIALS

CATTLEMEN'S BEEF PROMOTION AND RESEARCH BOARD

Statement of Assets, Liabilities and Net Assets

Sept. 30, 2020 and Sept. 30, 2019

ASSETS	2020	2019
Cash and cash equivalents	\$15,281,812	\$6,413,616
Short-term Investments	\$5,500,000	\$11,000,000
Long-term Investments	\$2,500,000	\$5,500,000
Capital assets, net of accumulated depreciation of \$39,170 and \$72,744	\$21,228	\$2,150
Other	\$9,240	—
Total Assets	\$23,312,280	\$22,915,766

LIABILITIES & NET ASSETS	2020	2019
Due to state beef councils & other	\$27,007	\$2,499
Due to Montana Beef Council	—	\$954,992

NET ASSETS, WITHOUT DONOR RESTRICTION		
Designated for future expenses	\$17,497,459	\$15,912,520
Designated – board reserve	\$4,350,000	\$4,350,000
Undesignated	\$1,437,814	\$1,695,755
Total Liabilities & Net Assets, Without Donor Restriction	\$23,312,280	\$22,915,766

REVENUES	2020	2019
Assessments	\$41,541,515	\$42,706,709
Interest	\$293,224	\$346,900
Other	\$46,255	\$35,555
Total Revenues	\$41,880,994	\$43,089,164

EXPENSES	2020	2019
PROGRAM EXPENSES:		
Promotion	\$10,206,858	\$10,580,409
Research	\$8,349,734	\$9,891,043
Consumer Information	\$7,260,148	\$7,571,245
Industry Information	\$3,392,835	\$3,357,876
Foreign Marketing	\$6,933,262	\$8,347,484
Producer Communications	\$1,553,796	\$1,637,234
Program Evaluation	\$202,046	\$158,875
Program Development	\$388,847	\$435,772
Total Program Expenses	\$38,287,526	\$41,979,938
SUPPORTING SERVICES:		
USDA Oversight*	\$761,214	\$596,367
Administration	\$1,505,256	\$1,729,852
Total Expenses	\$40,553,996	\$44,306,157

*Included in the USDA Oversight amount is approximately \$600,000 and \$404,000 paid by the Cattlemen's Beef Board to USDA for oversight fees during fiscal years 2020 and 2019, respectively. The remaining \$161,000 and \$192,000 is related to cost incurred by the Cattlemen's Beef Board for litigation, meetings with USDA, freedom of information act requests, settlement requests and authorization requests during fiscal years 2020 and 2019, respectively.

ASSESSMENT REVENUES:	2020
QUALIFIED STATE BEEF COUNCILS	
Alabama	\$328,021
Arizona	\$321,224
Arkansas	\$406,768
California	\$1,868,165
Colorado	\$1,611,967
Delaware	\$3,947
Florida	\$308,528
Georgia	\$263,280
Hawaii	\$18,327
Idaho	\$890,555
Illinois	\$300,507
Indiana	\$218,180
Iowa	\$1,704,544
Kansas	\$3,700,788
Kentucky	\$645,518
Louisiana	\$144,908
Maryland	\$39,580
Michigan	\$272,808
Minnesota	\$729,459
Mississippi	\$248,227
Missouri	\$1,210,455
Montana	\$901,391
Nebraska	\$3,484,131
Nevada	\$124,148
New Jersey	\$3,763
New Mexico	\$588,976
New York	\$331,447
North Carolina	\$150,613
North Dakota	\$563,929
Ohio	\$331,288
Oklahoma	\$1,781,692
Oregon	\$416,182
Pennsylvania	\$334,173
South Carolina	\$68,397
South Dakota	\$1,467,621
Tennessee	\$380,532
Texas	\$5,079,846
Utah	\$303,093
Vermont	\$43,510
Virginia	\$360,329
Washington	\$563,405
West Virginia	\$72,217
Wisconsin	\$713,676
Wyoming	\$499,442
Total Qualified State Beef Councils	\$33,799,557
STATES WITHOUT QUALIFIED STATE BEEF COUNCILS	
Alaska	\$194
Connecticut	\$10,515
Massachusetts	\$16,840
Maine	\$18,753
New Hampshire	\$8,801
Rhode Island	\$373
Total States Without Qualified State Beef Councils	\$55,476
Importers	\$7,686,482
Total Assessment Revenues	\$41,541,515