



State & National Partnership The Federation of State Beef Councils



2023 INVESTOR REPORT



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Irwin, J.W.	South Carolina Beef Council	Shields, Pat	Texas Beef Council
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Dear Fellow Producers,

Since 1963, the Federation of State Beef Councils has been committed to building beef demand by inspiring, unifying and supporting an effective and coordinated state and national Checkoff partnership. During the 2023 Cattle Industry Convention in New Orleans, the Federation reaffirmed this vision along with the following Statement of Beliefs.



- We believe in the power of a strong state and national partnership resulting in increased consumer demand for beef.
- We believe in producer control of Checkoff funds through the Qualified State Beef Councils, which are the foundation of the Beef Checkoff.
- We believe greater knowledge about the Checkoff results in greater support for the Checkoff.
- We believe in the industry Long Range Plan as a guidepost for the Beef Checkoff and the principle of “one vision – one plan – one unified voice.”

Only one word was added to these beliefs, but it was a powerful one: unified. The Federation believes in one vision, one plan and one UNIFIED voice. It is the strong state and national partnership that unifies the Federation to speak with one voice and drive beef demand.

While how we drive that demand has certainly changed over the years, one thing remains constant and that is the industry’s dedication to continuous improvement. Whether it is adapting practices to improve animal well-being and conserve natural resources at the ranch or finding new ways to effectively reach consumers, we are stronger when we work together.

This “State of the Federation” provides an overview of Federation-funded programs that producers have helped to direct over the past year. From research and promotion to consumer and industry outreach, these efforts demonstrate the power of unity.

Sincerely,

Clark Price
Hensler, North Dakota
Chair, Federation of State Beef Councils

Federation of State Beef Councils Executive Committee

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Vice Chair Dan Gattis, Texas
Region I Allan Robison, Ohio
Region II Russ Uselton, Tennessee
Region III Janine Moore, Iowa
Region IV Jess Kane, Oklahoma
Region V Andy Kellom, Montana
Region VI Michael Smith, California
Region VII Gary Deering, South Dakota
Revenue Seat Dan Hanrahan, Iowa
Revenue Seat Larry Jones, Kansas
Revenue Seat Jim Ramm, Nebraska
Revenue Seat Pat Shields, Texas



Back Row, left to right: Clark Price, ND; Al Lyman, IL; Dan Gattis, TX; Scott Lake, WY; Larry Barthle, FL
Front Row, left to right: Travis Maddock, ND; Barb Downey, KS; Jenni Birker, IA; Nancy Jackson, MS; Chris Jeffcoat, PA

Federation Members-Beef Promotion Operating Committee

Clark Price, North Dakota
Dan Gattis, Texas
Larry Barthle, Florida
Jenni Birker, Iowa
Barb Downey, Kansas
Nancy Jackson, Mississippi
Chris Jeffcoat, Pennsylvania
Scott Lake, Wyoming
Al Lyman, Illinois
Travis Maddock, North Dakota

The Power of Partnerships



The Federation of State Beef Councils represents the 43 Qualified State Beef Councils (QSBCs), and collectively, these QSBCs include more than 700 state board members representing every segment of the beef industry. The following report includes an overview of national programs developed by the National Cattlemen's Beef Association, a contractor to the Beef Checkoff, which were supported by the Federation of State Beef Councils and extended by states locally.

The Federation of State Beef Councils builds a larger, more impactful, coordinated plan that is executed as a partnership between the Federation and individual state beef councils (SBCs). State beef councils voluntarily invest in the Federation each year. More than 50% of the Federation's annual budget supplements tactics within Authorization Requests (ARs) approved by the Beef Promotion Operating Committee (BPOC) and executed by NCBA, home of the Federation of State Beef Councils. Supplementing these tactics helps the national Checkoff program have a larger impact on consumer demand.

In 2023, with input from SBC staff, the Federation Executive Committee approved nearly \$3.8 million to supplement national efforts. Specific programs made possible by SBC contributions to the Federation include, but are not limited to:

PROMOTION



STATE BEEF COUNCILS SUPPLEMENT \$1,318,000

- Celebrity athlete Tony Romo was the spokesperson for *Beef. It's What's For Dinner.*, promoting beef across multiple campaigns including winter holiday content.
- With support from the Federation, content was created to showcase the *Beef. It's What's For Dinner.* brand focusing on moments throughout the year when families and friends gather together to enjoy beef.
- The Federation supported efforts to promote beef during the third annual *Beef. It's What's for Dinner. 300*, the 42nd season-opening race for the NASCAR Xfinity Series, at Daytona International Speedway in February 2023.

RESEARCH



STATE BEEF COUNCILS SUPPLEMENT \$1,000,000

- State investments in the Federation fund foundational research projects in the areas of product quality, beef safety, human nutrition, beef sustainability and market research. Research projects funded in FY23 include:
- **Product Quality:** Research is designed to improve beef quality, consistency, value and demand. Current projects include the study of new packaging technologies and the effects of freezing on beef quality and palatability.
- **Beef Safety:** Research focuses on cattle-borne pathogens and/or their resistance, such as a current project studying the impact of water and environmental management on Salmonella.
- **Human Nutrition:** Beef farmers and ranchers continue to support nutrition research to advance the understanding of beef's role in a balanced and healthy diet. A current project is studying the effects of beef consumption on skeletal muscle protein.

CONSUMER INFORMATION

STATE BEEF COUNCILS SUPPLEMENT \$995,000

- E-commerce efforts put beef in online carts, and partnerships with retailers, foodservice operators and state beef councils generated significant beef sales.
- Information about beef's role in a healthy diet was shared with health professionals through direct mailings to cardiologists and physicians.
- Popular food influencers shared beef recipes and educational content through their social media platforms, extending beef's positive message to consumers from coast to coast.
- Federation funding made it possible to place sustainability content in national publications.



INDUSTRY INFORMATION



STATE BEEF COUNCILS SUPPLEMENT \$485,000

- This past year, Masters of Beef Advocacy (MBA) sustainability content was updated.
- Ten Trailblazers from eight states were selected for the second cohort of beef community spokespeople, beginning the year-long program which includes in-person and virtual training opportunities to prepare the next generation of advocates who will help protect the reputation of the beef industry.
- The Beef Quality Assurance-Transportation modules were updated, and the National Beef Quality Assurance Awards recognized outstanding beef and dairy producers, marketers, and educators from across the country.
- Results from the National Beef Quality Audit, conducted approximately every five years, were shared to help improve quality, minimize economic loss, and aid in advancements in producer education for the U.S. beef industry.

Driving Beef Sales Through E-Commerce



Beef up the grill

Savor classic summer dishes—from burgers to steaks.

Shop now



Sponsored

As consumers continue to turn to online ordering for their grocery shopping needs, the National Cattlemen's Beef Association, a contractor of the Beef Checkoff, is partnering with national retailers and foodservice operators to encourage consumers to put more beef in their baskets and on their plates.

64% of consumers say they are ordering groceries online, with 44% of consumers including fresh beef in those grocery orders. When it comes to foodservice, online ordering has become overwhelmingly popular, with 80% of consumers saying they order meals online and 70% using online ordering for burgers.¹

To ensure that beef's positive message is reaching existing customers as well as new online buyers, NCBA and the Beef Checkoff partner with national grocery retailers for e-commerce efforts. Ads inspire consumers to purchase beef throughout the year. In addition, beef is front and center with consumers ordering meals online through e-commerce campaigns with restaurants, food delivery services and foodservice distributors.

Digital ads capture consumers' attention through attractive beef photography showcasing seasonally relevant cuts and the *Beef. It's What's For Dinner.* logo. Retail ads do not contain coupons but merely inspire consumers to add beef to their cart – either digitally or in-store. The ads are placed on the retailer's website and app, as well as placed on popular lifestyle sites and occasionally a retailer's social platforms such as Pinterest.

For foodservice campaigns, ads are created to highlight limited time beef offers. Beef Checkoff funds are utilized only for advertising, and any offers or discounts are 100% funded by the foodservice partner. The food delivery service and restaurant partners track sales data to show how beef sales increased over the course of the campaign.

One of the biggest advantages of e-commerce promotions is the ability to show actual sales and results. A recent “back to school” e-commerce campaign with a national mass merchandiser promoted beef through digital ads, both on the retailer's website as well as popular consumer lifestyle sites that led back to the retailer's beef landing page. The nearly two-month promotion resulted in \$11.6 million in incremental beef sales, 30.5 million ad impressions and a return on ad spend of \$49. That means that for every one Checkoff dollar spent on the campaign, \$49 was returned in incremental beef sales.

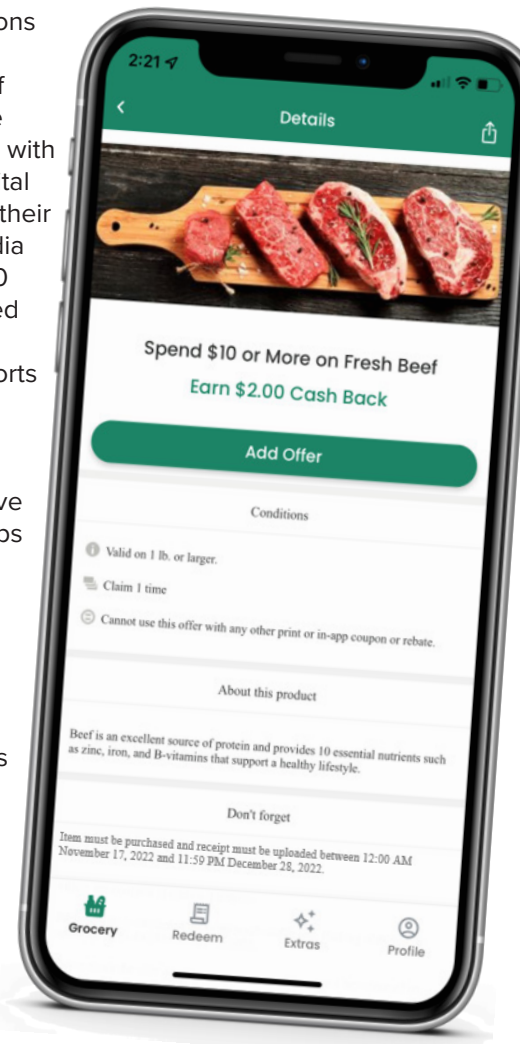
In addition, a December 2022 holiday e-commerce campaign with a national mass merchandiser promoted beef through digital ads. The promotion resulted in \$4 million in incremental beef sales, 37.8 million ad impressions and a return on ad spend of \$13.45. Twelve state beef councils and the Northeast Beef Promotion Initiative provided additional funding to increase ad exposure within their states.

A foodservice promotion with Uber Eats and a national burger chain resulted in a 200% increase in burger orders the week of the promotion, and an impressive 10% increase in beef sales. A partnership with a broadline foodservice distributor served consumers and foodservice operators beef ads online during their ordering process, and the two-month campaign drove an increase of 32% in cases of beef sold.

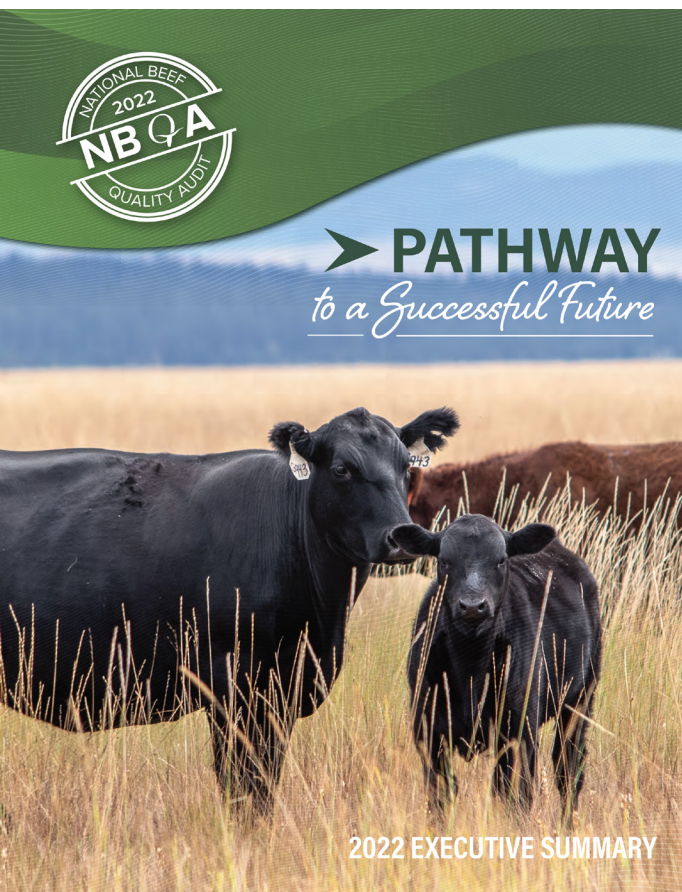
E-Commerce promotions go beyond national campaigns. State beef councils also have the opportunity to partner with NCBA to increase digital ad placements within their states or in major media markets. More than 20 states have contributed funds to participate in retail e-commerce efforts over the past year.

Overall, e-commerce efforts continue to drive beef sales. Partnerships with national supermarket chains, mass merchandisers and club stores resulted in more than \$30 million in incremental beef sales in the past year.

1 State of the Consumer Survey, August 2022



National Audit Shows Efficiency Improvements



Since 1991, the Beef Checkoff-funded National Beef Quality Audit (NBQA) has delivered a set of guideposts and measurements for cattle producers and other stakeholders to help determine quality conformance of the U.S. beef supply. Results from the 2022 NBQA indicate that the beef cattle industry is producing a high-quality product that consumers want more efficiently and the industry's primary focus across the supply chain remains food safety.

"The NBQA is an important tool for the industry to identify where improvements are being made and where there are opportunities to capture more value," said Josh White, senior executive director of Producer Education and Sustainability at NCBA. "The good news is, overall, the beef industry is providing a quality product to consumers that they enjoy."

Early NBQAs focused on the physical attributes of beef such as marbling, external fat, carcass weight and carcass blemishes. These cattle industry concerns have evolved to include food safety, sustainability, animal well-being and the growing disconnect between producers and consumers. As a result, over the past 30 years, NBQA researchers have made significant changes to the research, leading to an increasingly meaningful set of results.

Based on individual interviews with stakeholders from across the cattle industry as well as in-plant research, key learnings for fed cattle from the 2022 NBQA include:

- Market segments no longer consider food safety as a purchasing criterion, but an expectation.
- When comparing 2016 and 2022 NBQAs, the largest improvement was overall increased efficiency across the beef supply chain.
- Market sectors indicated that their companies strive to increase their sustainability, and work with the entire beef supply chain to do so.
- The entire industry felt the effects of the COVID-19 pandemic, nonetheless, beef proved to be a choice of consumers, and the industry persevered to provide products.
- Due to pandemic pressures, more cattle over 30 months of age were harvested.
- The beef industry's image improved within fed cattle market sectors.
- Foreign materials continue to present a problem, but the industry is making strides to decrease incidence.
- There was an increase in usage of electronic identification (EID).
- There was an increase in the frequency of Prime and Choice quality grades, while Select decreased drastically.
- While the industry is improving the quality of beef being produced, that quality is being accompanied by an increase in carcass weight and fat thickness, as well as large increases in percentages of Yield Grade 4 and 5 carcasses.

The NBQA, conducted approximately every five years, is foundational research that provides an understanding of what quality means to the various industry sectors, and the value of those quality attributes. This research helps the industry make modifications necessary to increase the value of its products. The efforts of the findings from the 2022 NBQA serve to improve quality, minimize economic loss, and aid in advancements in producer education for the U.S. beef industry. For more information about the 2022 National Beef Quality Audit, visit www.bqa.org.

Roll Out the Red Carpet for Beef



Beef's protein-packed saga features a sizzling central character and juicy plot line set in glamorous locations such as home kitchens, backyards and restaurants. While it is a familiar tale that many love, sharing it with new audiences is important. The National Cattlemen's Beef Association (NCBA), a contractor to the Beef Checkoff, rolls out the red carpet for beef and shares its story of taste, versatility and nutrition with audiences of all ages.

SETTING THE STAGE

With 63% of consumers viewing farmers and ranchers as the most credible sources of information when it comes to production practices,¹ it is important for producers to share their stories. Making personal connections gives the public a glimpse into the daily lives of the people behind the product that is on family dinner plates and sets the stage for ongoing relationships.

The Beef Checkoff shares positive stories about beef, positioning beef as the top protein with consumers and driving beef demand. NCBA works with national publications as well as lifestyle and news publications in major metropolitan areas, such as [Sports Illustrated](#), [Texas Monthly](#), [Seattle Times](#), and [Atlanta Magazine](#) to place positive stories showcasing producers and the benefits of beef. Combined, these stories have, so far, reached more than 130 million consumers across the country.

ONLINE STARS

Working with food, culinary and agricultural influencers provides a way to amplify beef messages and to interact with consumer audiences through credible third parties. Influencers share their personal beef stories, recipes and tips to educate and inspire their peers and consumers.

The program creates compelling consumer content collaboratively and provides educational opportunities for influencers to tell the beef story in a knowledgeable and authentic manner in their own voice but armed with relevant information. Selected influencers and organizations are a natural fit for the *Beef. It's What's For Dinner.* brand because they are passionate about beef, credible in their field, create visually appealing content and have a highly engaged national audience. So far in 2023, 23 influencers have created 75 posts sharing beef recipes, meals and stories from the ranch, reaching more than 15 million consumers and generating 1.3 million engagements.

TAKE TWO

Following a successful health professional mailing highlighting Beef in the Early Years in 2022, two additional toolkits were sent out to provide health professionals with science-based information about beef's role in a healthy lifestyle. The kits aimed to equip healthcare professionals with valuable education, tools and resources they could then share with their patients and clients.

As part of the effort, more than 3,300 Strong Minds, Strong Bodies toolkits were mailed to pediatric and family physician offices to showcase how beef can contribute to healthy growth and development for school-age children and teens. Each kit contained a letter to the health professional, a MyPlate teaching tool and a tear pad with tips and a beef recipe for parents. According to surveys following the toolkit mailing, 91% of professionals have already recommended beef to patients and 95% of consumers have prepared or plan to prepare a meal that includes beef.

In addition, more than 850 Beef Nutrition and Heart Health cookbooks were sent to cardiologists and physicians, along with a cover letter from the author, relevant research and heart health consumer content. When recipients were asked about the information they received, one respondent stated, "The research studies were very informative for providing evidence for including lean beef in a healthy balanced diet."

The purpose of the Beef Checkoff's health professional outreach is to increase influencer and consumer understanding of beef's role as a wholesome and nutritious food that can be a part of a healthy and balanced diet. By engaging with health and wellness influencers such as physicians, registered dietitians, health and fitness professionals, and credentialed media influencers, the Beef Checkoff continues to deliver the message that the beef people love is good for them too. The positive recommendations made by health professionals regarding beef's role in a healthy diet have a significant impact on shaping public perception and influencing nutrition guidance.

From influencers sharing personal experiences with followers and reaching consumers where they find information on a daily basis, to connecting with health professionals from coast to coast, the Beef Checkoff finds innovative ways to make beef the star of the show.

BQA Doesn't End at the Farm Gate



Cow-calf producers, stockers and feedyards implement Beef Quality Assurance (BQA) practices on their operations to produce the highest quality cattle and provide consumers with the best possible eating experience. However, BQA doesn't end at the farm gate, and those transporting cattle can also become BQA Transportation (BQAT) certified.

"Hauling can be one of the most stressful times in the life of cattle," said Colby Carpenter with W&J Carpenter Trucking Inc., a 2022 BQA Award winner. "BQAT provides anyone transporting cattle with the information and resources they need to make sure animals are handled properly, resulting in less stress and a higher quality product for consumers."

BQAT is a comprehensive management program that incorporates responsible practices in all phases of transporting cattle. In-person training and free online courses are designed for both ranchers hauling cattle in gooseneck trailers and professional drivers who are transporting animals in semi-trailers. These courses teach proper methods for hauling cattle including biosecurity, fitness for transport, pre-trip planning and loading, and emergency management.

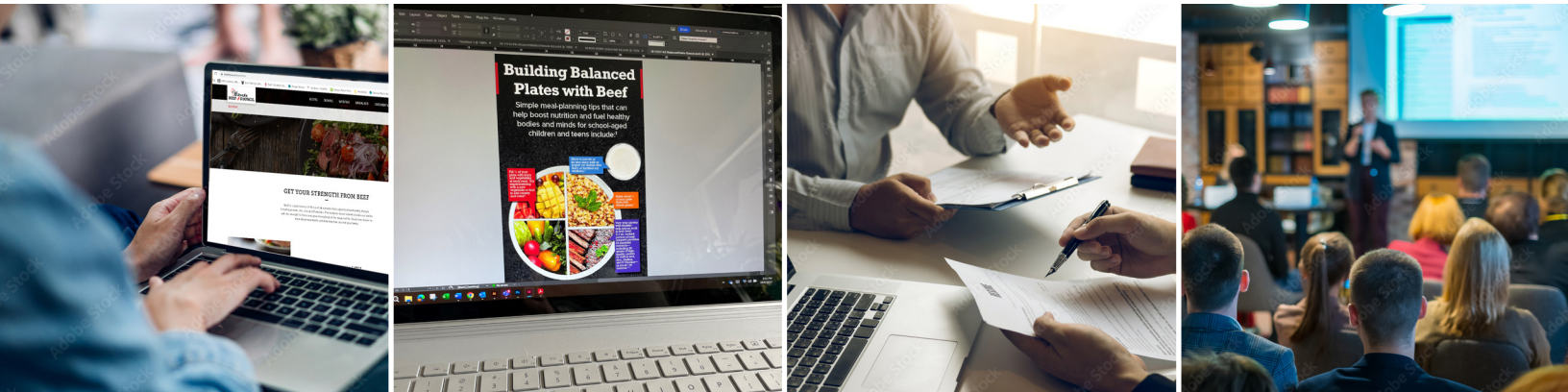
BQAT is science-based, and producer-driven and online modules have been updated. A working group of industry leaders from all sectors of the cattle industry came together to revise BQAT material and provide updates needed to fit industry needs for hauling cattle.

"As the industry changes and evolves, educational materials are revised," said Trey Patterson, Wyoming rancher and chair of the Beef Quality Assurance Advisory Group. "We work with producers and those hauling cattle to create a program that meets the needs of the animals and the industry."

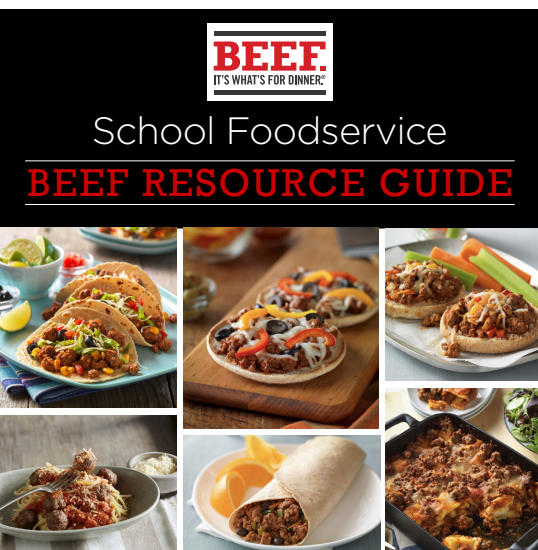
The Beef Quality Assurance (BQA) program, funded by the Beef Checkoff, provides information to U.S. beef producers and beef consumers about how common-sense husbandry techniques can be coupled with accepted scientific knowledge to raise cattle under optimum management and environmental conditions. BQA guidelines are designed to make certain all beef consumers can take pride in what they purchase – and can trust and have confidence in the entire beef industry.

BQA and BQAT certifications are available through in-person trainings and online courses. To learn more about BQA and to become certified, visit www.bqa.org.

The Federation is at Your Service



In addition to the funds invested which supplement the integrated state/national plan, state beef council investments also provide services for states and support the governance of the Federation. A variety of services are available at no cost to state beef councils, including creative and design services, communications assistance, IT and website help, human resources facilitation, staff and leadership development and training and education. Here are a few examples of how state beef councils have utilized some of these services during the last year.



FARM TO SCHOOL RESOURCE

- ▶ The Wisconsin Beef Council (WBC) worked with the Creative Services team to design a resource guide that helps school foodservice staff utilize beef more often and in different ways on their lunch trays. The resource guide encompasses beef's nutritional benefits for adolescents, utilizing various cuts of beef in recipes, ways to source local beef, safety tips and tricks when working with raw product, and a variety of recipes that are pre-credited for the directors' ease of use. This resource guide is available to all state beef councils on the new K-12 Nutrition page of www.BeefItsWhatsForDinner.com.

STREAMING CULINARY DEMOS

- ▶ The Federation's in-house video team assisted several state beef councils, including those in Arizona, Michigan, New York and Pennsylvania with streaming culinary demos. These live cooking demos elevated beef in consumer homes by sharing information about beef's taste, nutrition and versatility in a hands-on and engaging way.

[Watch video here.](#)





NUTRITION SEMINAR PROGRAM

- ▶ Nearly 30 states utilize this popular program every year. The Nutrition Seminar Program, funded by the Federation, works in collaboration with SBCs to provide influential, credentialed health and nutrition experts to speak on cutting-edge issues at State Academy of Nutrition and Dietetics meetings, as well as other statewide meetings and conferences whose audiences include credentialed health professionals. Topics and speakers are tailored to meet each state's needs.

For example, the Washington State Beef Commission (WSBC) invited Dr. Heather Leidy, to present to the Washington State Academy of Nutrition and Dietetics on the topic of Promoting Health & Well-being from Birth to Adolescence through Key Dietary Strategies: The Importance of Dietary Protein & Breakfast Consumption. To further enhance the experience, Jackie Madill with WSBC provided a cooking demonstration following the presentation.

BIG TIME

- ▶ No job is too big for the Federation Services team. From outdoor billboards and vehicle wraps to signage and banners, state beef councils turn to Creative Services for help with large format design and printing.

To promote beef to highway drivers, the Georgia Beef Board and other state beef councils requested Creative Services to design massive billboards featuring beautiful beef images and simple messages. And when the Iowa Beef Industry Council needed help with their booth design at the state fair, the team created a life-sized cardboard cutout of former quarterback Tony Romo holding a tray of burgers. The friendly athlete attracted fairgoers' attention, drawing them over to the display with information about beef. Other states also requested assistance with booth display backdrops, pop-up banners and educational materials for events.



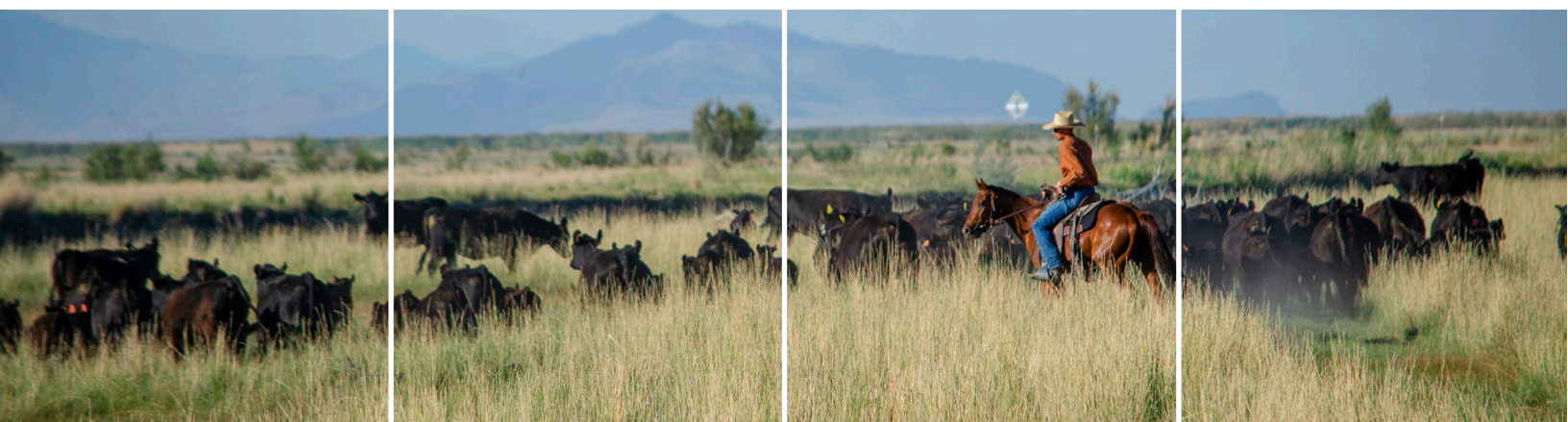
2023 Federation Expenses

For the year ending 9/30/2023

	BPOC/CBB	Federation	Total	Federation Percentage
Revenue				
BPOC/Federation	\$26,261,931	\$8,479,202	\$34,741,133	24%
Customer Service	—	\$135,836	\$135,836	100%
Other	—	\$173,260	\$173,260	100%
Total Revenue	\$26,261,931	\$8,788,298	\$35,050,229	25%
BPOC Program Expenses				
Promotion	\$9,404,049	\$2,230,827	\$11,634,876	19%
Research	\$8,259,692	\$1,082,625	\$9,342,317	12%
Consumer Information	\$5,972,013	\$2,095,140	\$8,067,153	26%
Industry Information	\$2,546,015	\$518,336	\$3,064,351	17%
Total BPOC program expenses	\$26,181,769	\$5,926,928	\$32,108,697	18%
Non-BPOC Program Expenses				
Federation Relations (a)	—	\$2,013,879	\$2,013,879	100%
Customer Service	—	\$264,729	\$264,729	100%
Governance (b)	—	\$762,279	\$762,279	100%
Other	\$80,162	—	\$80,162	0%
Total Non-BPOC program expenses	\$80,162	\$3,040,888	\$3,121,050	97%
Total expenses	\$26,261,931	\$8,967,816	\$35,229,747	25%
Net use of Strategic Reserves (c)	—	(\$ 179,518)	(\$179,518)	100%

Note: Excludes Federation Non-Checkoff (FS40)

- (a) Federation Relations includes expenses associated with services and materials provided to State Beef Councils.
- (b) Governance includes expenses associated with meetings and travel for NCBA's Officers, Board, Executive Committee and other committee members charged with governing the association. Governance costs are allocated to Federation and Policy divisions accordingly.
- (c) Net use of strategic reserves required to complete multi-year programs and State Beef Council support.



Summary of State Beef Council Investments

For the year ending 09/30/2023

State Beef Council	Overall Programs & Services	Earmarked for Specific Projects	SBC Investments
Alabama	26,000	30,000	56,000
Arizona	20,000	50,000	70,000
Arkansas	29,000	26,000	55,000
California	23,000	29,900	52,900
Colorado	62,000	46,000	108,000
Florida	19,000	60,000	79,000
Georgia	19,000	0	19,000
Hawaii	684	0	684
Idaho	124,943	0	124,943
Illinois	14,000	5,000	19,000
Indiana	17,000	5,000	22,000
Iowa	524,596	49,000	573,596
Kansas	2,024,352	69,000	2,093,352
Kentucky	31,000	42,000	73,000
Louisiana	17,000	0	17,000
Michigan	14,000	12,500	26,500
Minnesota	49,000	37,300	86,300
Mississippi	28,000	0	28,000
Missouri	198,911	5,000	203,911
Montana	101,000	0	101,000
Nebraska	1,633,676	65,773	1,699,448
Nevada	0	12,400	12,400
New Mexico	29,000	22,860	51,860
New York	14,000	15,000	29,000
North Carolina	19,000	0	19,000
North Dakota	237,709	26,500	264,209
Ohio	14,000	16,800	30,800
Oklahoma	305,000	72,500	377,500
Oregon	23,000	0	23,000
Pennsylvania	17,000	5,400	22,400
South Carolina	5,000	0	5,000
South Dakota	98,500	10,000	108,500
Tennessee	54,000	42,000	96,000
Texas	1,400,000	38,500	1,438,500
Utah	23,000	179,000	202,000
Virginia	20,000	48,673	68,673
Washington	20,000	28,800	48,800
West Virginia	3,724	0	3,724
Wisconsin	26,000	30,000	56,000
Wyoming	160,000	10,000	170,000
Total Investments	7,445,095	1,090,905	8,536,000
Deferred Investments Adjustment	(68,387)	11,589	(56,798)
Totals	\$7,376,708	\$1,102,494	\$8,479,202



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