

BEEF IN THE BIG CITY



BEEF CHECKOFF'S URBAN PUSH IN THE NORTHEAST

STORY CONTINUED ON NEXT PAGE ►

New York City, Washington D.C., Boston, Philadelphia and Hartford are among the major metropolitan cities in the Northeast. Home to nearly 74 million consumers with people outnumbering cattle 16:1, this area, extends from Maine to Virginia. Less than 2.7 percent of total Beef Checkoff assessments are collected within the region, and six of the 12 states do not have a local State Beef Council. **So, how does the Beef Checkoff extend beef promotion into the heavily populated Northeast region with limited State Beef Council support? Enter the Northeast Beef Promotion Initiative (NEBPI) as the key to amplifying beef's presence.**

PROGRAM HISTORY

As a subcontractor through Beef Checkoff contractor Meat Import Council of America (MICA), NEBPI is housed within the Pennsylvania Beef Council and builds beef demand in the Northeast metros, covering Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Virginia and West Virginia, through supply chain engagement, consumer outreach and work with nutrition experts.

In the early 2000s, the gap between limited Beef Checkoff dollar resources and a growing population of consumers in the Northeast became apparent, creating a clear opportunity to channel nationally collected Beef Checkoff dollars into this region. Here's how the program got started and evolved throughout the years:

- 2004**
Representatives from various Qualified State Beef Councils (QSBC) and industry organizations in the Northeast joined to discuss the opportunity to initiate a program specifically designed to channel national Beef Checkoff resources to that region.
- 2005**
The first funding was awarded by the Beef Promotion Operating Committee (BPOC).
- 2012**
The first QSBC funding partner invested additional dollars for regional programming efforts.
- 2015**
Additional QSBC partners gathered resources together to further the impact of programming.
- 2024**
During the nineteenth consecutive year executing programming, NEBPI continues to share return-on-investment numbers with six QSBC funding partners and works to meet the needs for beef promotion and education in the Northeast.

CORE PROGRAM AREAS

1. Connecting with Supply Chain Experts

As the go-to resource for all things beef on the menu and in the meat case, NEBPI collaborates with Northeast retail and foodservice partners. By building relationships with culinary schools, retail and foodservice professionals, e-commerce companies, and by partnering on regional beef campaigns, such as mobile pre-shopping apps, NEBPI ensures a positive beef purchasing experience and drives beef sales.

2. Executing Consumer Outreach

Bridging the gap between Northeast consumers and valuable beef

resources, NEBPI highlights beef's flavor, nutrient density, versatility and the integrity of cattle producers. NEBPI aims to reach and engage with metro consumers through Beef Checkoff-funded digital campaigns and in-person events, with an increased focus on high school and collegiate athletics.

3. Engaging with Influential Nutrition Experts

To empower health professionals with evidence-based nutrition science, NEBPI builds connections with health professionals and educators, helping them feel confident when recommending beef within their circles of influence. NEBPI grows relationships with key health professionals by hosting qualified speakers to share the science behind beef's nutritional profile. NEBPI also coordinates engaging immersion events to drive home key beef nutrition messages.

CONSUMER INSIGHTS

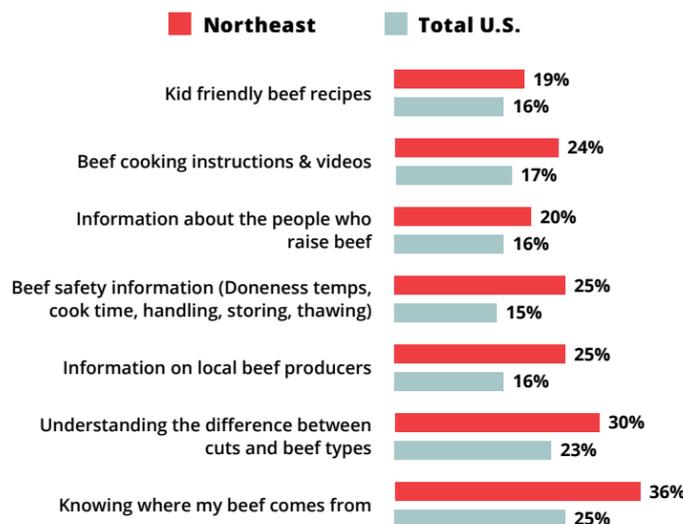
To successfully execute the core program areas, NEBPI must first understand the Northeast consumer and their buying habits. In 2023, the Northeast Dashboard Survey¹ revealed important information about the Northeast consumer. Here are key findings for the region:

Key Findings

1. Consumers in the Northeast are actively eating beef, with most (72%) doing so at least once a week, and they are unlikely to change their consumption habits in the future.
2. Consumers in the Northeast seem more nutrition-oriented since their top three consideration factors when choosing a meal with protein are taste, value for money and health.
3. Twenty-nine percent of consumers purchased beef directly from a beef producer at least once. The main driver for those purchases is to receive a better-quality product, followed by the desire to support the local economy.

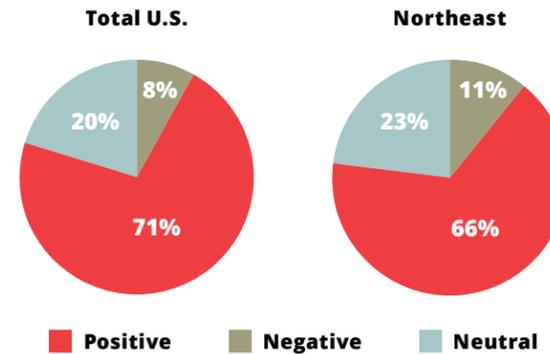
ENCOURAGING BEEF CONSUMPTION

Consumers across the Northeast region may be motivated to increase their beef consumption if they have access to more recipe ideas and cooking methods, specifically those that are healthy, quick and easy. These consumers express greater interest in knowing where their beef comes from, learning about local beef farmers and ranchers, and receiving nutritional materials and relevant safety information.



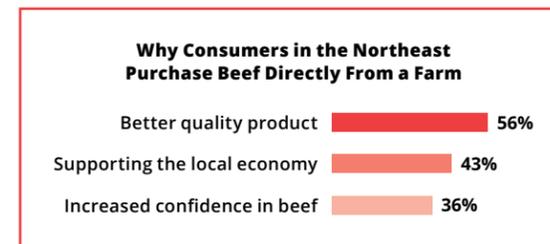
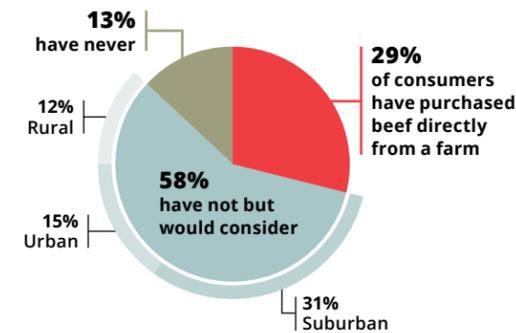
OVERALL PERCEPTION OF BEEF

Northeast consumer attitudes toward beef as a protein source are more favorable than their attitudes toward production practices. Overall, perceptions are lower than reported nationally, with more negativity towards raising cattle. These perceptions might be lower due to limited knowledge of the production process.



PURCHASING BEEF DIRECTLY FROM A FARM IN THE NORTHEAST

Nearly 30% of consumers have purchased beef products directly from a farm in the Northeast and do so because they believe they receive better-quality products and want to support the local economy.



Following this survey, NEBPI revealed opportunities for continued success. Beef Checkoff-funded programs will share more quick-and-easy beef recipes, highlight beef's positive story, show how cattle are raised responsibly and feature the Northeast Beef Directory as a resource for locating local beef producers.

To learn more about NEBPI, visit NEBPI.org.

Graph Sources:
¹Beef Tracker August 2023; National n=504. Qualtrics/PureSpectrum State Dashboard August 2023; Northeast Region n=503

NORTHEAST PROGRAM HIGHLIGHTS



BEEF ON THE TODAY SHOW
Beef was featured on the *Today Show* with Hoda and Jenna in their "Today Food" segment. Through a Beef Checkoff-funded partnership with Homemade Cooking, a Passover braised Chuck Eye Roast made its TV debut and affirmed that beef can be affordable and delicious for family holidays. The *Today Show* has a national TV audience of more than 1.4 million.



PENN STATE BUTCHER APPRENTICESHIP PROGRAM CLASS TAKEOVER
NEBPI got involved with the Penn State Butcher Apprenticeship Program in August and focused on beef carcass breakdown and cutting skills. The NEBPI team leads sessions on beef demand, Beef Checkoff resources and the versatility of beef cuts.



BEEF: THE PREFERRED PROTEIN OF THE PENNSYLVANIA TRACK & FIELD STATE CHAMPIONSHIPS
Beef was recognized as the preferred protein of the Pennsylvania State Track & Field Championships. Beef was promoted with samples, recipe inspiration and nutrition information among 2,600 student athletes from 350 schools and 15,000 spectators.

2025 BEEF CHECKOFF PROGRAM FUNDING

WHERE THE MONEY GOES: THE BREAKDOWN OF 2025 BEEF CHECKOFF FUNDING

The Beef Promotion and Research Act and Order authorizes Beef Checkoff funds to only be spent in the following program areas: beef promotion, research, consumer and industry information, foreign-market development and producer communications.

Each September, beef industry organizations present proposals – referred to as Authorization Requests, or “ARs” – to the Beef Promotion Operating Committee, comprised of members of the Cattlemen’s Beef Board and the Federation of State Beef Councils, to request funding for year-long marketing, education and research projects in these program areas. Those organizations approved for Beef Checkoff-funded work are referred to as Beef Checkoff contractors.

For FY25, the Beef Checkoff has eight contractors and two subcontractors. The contractors and their programs and projects are approved within each of the program areas for the fiscal year 2025 (October 2024 to September 2025).

INDUSTRY INFORMATION



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

MI

Administers the Veal Quality Assurance (VQA) program and fosters public awareness regarding VQA’s positive impact on animal well-being.
2025 Funding: \$60,000

NIAA

Promotes responsible antibiotic use and combats antimicrobial resistance by maintaining consistent scientific collaboration between the animal agriculture and human health sectors.
2025 Funding: \$95,000

NCBA

Conveys the message that beef offers unparalleled taste and nutrition while dispelling myths about beef to consumer audiences.
2025 Funding: \$2,800,000

CONSUMER INFORMATION



Strengthens beef’s image by proactively sharing nutritional data and positive messages with influential stakeholders, including media, food editors, dietitians, physicians and other key figures who shape consumers’ food knowledge.

MICA/NEBPI*

Builds beef consumption in highly populated Northeastern U.S. cities by working with restaurants and grocery store chains, marketing to specific consumer groups and garnering support from regional nutrition influencers.
2025 Funding: \$900,000

AFBFA

Provides science teachers with high-quality immersive experiences and materials to teach science through the lens of beef production.
2025 Funding: \$600,000

NCBA

Increases consumer awareness of the Beef. It’s What’s For Dinner. brand campaign and positions beef as the number one protein with restaurants, culinary leaders, grocery stores and other markets.
2025 Funding: \$6,000,000

PROMOTION



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

MI/ NYBC*

Empowers consumers with innovative approaches to access and purchase veal, elevating their veal-eating experiences through creative meal solutions that maximize taste, value and versatility.
2025 Funding: \$220,000

NCBA

Connects directly with consumers to promote beef through the iconic Beef. It’s What’s For Dinner. brand. Through beef marketing and merchandising, Beef. It’s What’s For Dinner. educates and inspires consumers to purchase, prepare and enjoy beef.
2025 Funding: \$8,900,000

RESEARCH



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

MF

Conducts post-harvest beef safety and science-based research on processed beef’s nutritional and health benefits.
2025 Funding: \$600,000

NCBA

Works alongside universities and institutions to conduct high-quality scientific research on beef’s nutritional benefits, providing a sound factual basis to promote beef’s role in a healthy diet.
2025 Funding: \$8,000,000

PRODUCER COMMUNICATIONS



Informs producers and importers about how their Beef Checkoff dollars are invested through a variety of efforts and initiatives.

CBB

Communicates to producers where their Checkoff dollars are spent through The Drive newsletter (printed and electronic versions), media relations, attendance at producer meetings, social media and other tactics.
2025 Funding: \$1,800,000

FOREIGN MARKETING



Develops international markets for U.S. beef through programs aimed at expanding market penetration, gaining new market access, improving global consumer perceptions and building trust.

USMEF

Maximizes market access for U.S. beef around the globe, develops demand among new and existing buyers overseas and increases the value of the entire carcass through export support.
2025 Funding: \$8,000,000

CONTRACTOR KEY

| | |
|--|---|
| AFBFA American Farm Bureau Foundation for Agriculture | NIAA National Institute for Animal Agriculture |
| CBB Cattlemen’s Beef Promotion and Research Board | MI Meat Institute |
| MF Meat Foundation | NEBPI* Northeast Beef Promotion Initiative |
| MICA Meat Import Council of America | NYBC* New York Beef Council |
| NCBA National Cattlemen’s Beef Association | USMEF United States Meat Export Federation |

*=Subcontractor

BEEF CHECKOFF HIGHLIGHTS

U.S. Meat Export Federation Program Updates

Purchasing Managers from Sam’s Clubs in China Study Korea’s Retail Market

The U.S. Meat Export Federation (USMEF), is working closely with Sam’s Club to help the retailer grow its profitability with U.S. red meat. Already the largest retailer in China for chilled U.S. beef with 48 outlets, Sam’s Club plans to open six or seven new outlets per year. USMEF took representatives on a tour of four retail outlets to demonstrate packaging and merchandising techniques for U.S. beef.

U.S. Beef Introduced to Industry in Ghana, West Africa

In an initial step toward exploring Ghana and the West Africa region’s potential for U.S. beef, USMEF partnered with USDA’s Foreign Agricultural Service and African importer PGL Distribution for an introductory seminar and tasting event at the Polo Club restaurant in Accra, Ghana. USMEF Corporate Chef Germán Navarrete joined USMEF Africa Representative Matt Copeland and USMEF Regional Representative Monty Brown to present a “culinary journey with U.S. beef” to more than 20 guests, including the country’s largest retailer, high-end hotels and restaurants, and high-profile influencers.

Showcasing U.S. Beef Alongside Top Restaurants at Mexico Food Festival

USMEF partnered with a foodservice distributor in Mexico to show food lovers how to bring exceptional experiences from top restaurants into their homes. One of Mexico’s premier food events, Sabores Polanco Festival, served as a training ground for participants through a series of masterclasses conducted by leading chefs and hosted by the U.S. beef and pork industries. More than 300 participated in the masterclasses.

STRAIGHT TALK

Beef Checkoff Study Shows a **\$13.41 Return** on Each \$1 Invested

AN INDEPENDENT ECONOMIC ANALYSIS OF THE NATIONAL BEEF CHECKOFF PROGRAM

The Beef Checkoff recently commissioned a third-party independent economic analysis conducted by Dr. Harry Kaiser of Cornell University to thoroughly assess the effectiveness and additional financial benefits produced by the program's demand-driving activities during 2019-2023. This study's objectives were to measure:

- Whether national Beef Checkoff demand-driving activities increased demand for beef products (domestically and abroad).
- The combined benefits of those activities in terms of their incremental financial impact to beef producers and importers.
- The indirect benefits of national Beef Checkoff demand-driving activities to the broader macroeconomy.

Beef Checkoff's Return-on-Investment (ROI) Study

What were the impacts of the national Beef Checkoff on beef demand² and for those producers and importers who pay into the program?

- For every national Beef Checkoff program dollar invested³ in domestic and export demand-driving activities for the most recent five-year period (2019-2023), a total financial impact of **\$13.41** was given back to the producers and importers who pay into the program.
- Total domestic beef demand would have been **2.4 BILLION** pounds (8.5%) lower per year than actual results.

- The steer price would have been **7.8%** lower per year than actual results.
- U.S. export beef demand would have been **372 MILLION** pounds (11.5%) lower than actual results in the seven major importing countries included in the study⁴.

Beef Checkoff's Broader Economic Impact Study

What was the direct effect of the national Beef Checkoff to the beef industry?

The study also evaluated the national Beef Checkoff's direct effect on the beef industry (i.e. producers and importers that pay into the program) and its indirect effects on the broader U.S. economy. To quantify the total revenue impact of the national Beef Checkoff on the beef industry sector, the study utilized the beef demand (8.5%) and U.S. beef export (11.5%) percentages derived from the ROI market simulation analysis. Applying these percentages indicated that the national Beef Checkoff added an incremental **\$3.3 BILLION** to the beef industry in 2023.

The direct effect of the national Beef Checkoff adding an incremental \$3.3 billion to the beef industry sector had positive indirect effects on the broader U.S. economy⁵, including increases in

- U.S. employment by almost **47,000** people
- U.S. employment income by **\$2 BILLION**
- Total value added to the U.S. economy of **\$4.1 BILLION**
- U.S. GDP by nearly **\$9.5 BILLION**

Furthermore, the national Beef Checkoff contributed to increased tax revenue at the federal, state and local levels, amounting to a grand total of **\$743 MILLION** in 2023, distributed as follows:

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

"We're extremely pleased with the results of this latest study," said Cheryl DeVuyst of Morrison, Oklahoma, former chair of the Beef Checkoff Evaluation Committee and current secretary-treasurer of the Cattlemen's Beef Board (CBB).

"The Beef Checkoff's primary goal is to increase beef demand here in the U.S. and worldwide. The statistics uncovered by this study tell us that we're achieving that goal and providing producers and importers with an excellent return on their national Checkoff investments."



To view the full ROI and Economic Impact Studies, visit, www.beefboard.org/return-on-investment/ ■

Sources:

¹The term "demand-driving activities" refers to national Beef Checkoff programs that influence beef demand such as promotion, education, trade servicing and influencer activities as well as research projects.
²Beef demand is the relationship between the price of beef and the quantity of beef purchased.
³The \$1 invested refers to national Beef Checkoff program dollars that were allocated to demand-driving activities from 2019-2023 by the Beef Promotion Operating Committee, a 12-member body of appointed producers and importers.
⁴Importing countries include Mexico, Japan, South Korea, Taiwan, Hong Kong, China and the European Union as they collectively represent the major destinations for U.S. beef exports.
⁵The term "broader economy" refers to the U.S. economy, which encompasses the beef industry (i.e., producers and importers,) input supply industries that benefit from increased purchase of inputs and services from the beef industry, and macroeconomic outputs.

BEEF CHECKOFF HIGHLIGHTS

Jan Lyons Receives Beef Checkoff Visionary Award



Congratulations to Jan Lyons of Manhattan, Kansas, for receiving the prestigious 2024 Beef Checkoff Visionary Award! This honor recognizes an individual in the beef industry who has shown outstanding support and commitment to the Beef Checkoff's goals and vision. Hear from Jan and learn about her years of dedication and leadership.

Watch Video:



<https://sw.n/sn/janlyons>

STATE BEEF COUNCIL PROGRAM SPOTLIGHT Bridging Science and Agriculture: Kansas Beef Council Hosts STEM Training for Educators

The Kansas Beef Council (KBC) hosted an On the Farm STEM training over the summer, bringing 15 Kansas middle and high school teachers together to explore how food and agriculture can be integrated into science education. Teachers were guided through hands-on experiences at Downey Ranch and Tiffany Cattle Company, demonstrating the intersection of STEM principles with modern ranching practices. Teachers learned about technologies like drones, GPS collars, and genetic testing, and received resources to bring these real-world applications into their classrooms.

Feedback from the event highlighted a shift in participants' trust in beef production practices, particularly regarding animal care and technology use, showing the program's impact on connecting agriculture to scientific learning.



Cattlemen's Beef Board

7555 E. Hampden Ave.

Suite 610

Denver, CO 80231

(303) 220-9890

What's Funded for 2025?

*See what Beef Checkoff
programs made the final cut.*

BEEF EXPORT
VALUE PERFORMANCE ¹

The graphic features a background image of several cows in a field under a blue sky. The text "BEEF EXPORT" is written in large, white, distressed-style capital letters across the middle. Below it, "VALUE PERFORMANCE" is written in smaller, white, clean capital letters, followed by a superscripted "1".

*Beef exports totaled
110,155 metric tons
(mt) in June, down four
percent from a year ago
but the second largest
monthly export total
in 2024.*

*June export value for
beef reached \$938.3
million, up three
percent year-over-year
and the highest since
August 2022.*

*June exports trended
higher to Japan and
were the third largest
on record to Taiwan,
while shipments to
Canada were the largest
in nearly a decade.*

*Through the first half
of the year, beef export
value climbed five
percent from a year ago
to \$5.22 billion, despite
a 4 percent decline in
volume (643,733 mt).*

Sources:

¹Data released by USDA and compiled by the U.S. Meat Export Federation (USMEF).

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