The Cattlemen’s Beef Promotion and Research Board is dedicated to improving producer profitability, expanding consumer demand for beef, and strengthening beef’s position in the marketplace.
Figures presented within this report are based on data compiled by individual contractors. Unless indicated otherwise, results are based on October 1, 2017 to September 31, 2018 data.
More Bang Per Buck

That’s always been the unwavering purpose of the Beef Checkoff program: to make every dollar go to work as a strong ambassador for beef, to maximize the presence of beef across all markets, to uphold and celebrate our standards of quality — and above all else, drive demand. The Beef Checkoff is the voice our farms and ranches need to defend, protect and promote, and I am proud to serve as a voice for our livelihood.

In 2018, in conjunction with beef contractors, the Beef Checkoff has: helped attract new celebrities and famous chefs to promote beef; developed new recipes to reach more consumers; updated standards for health and safety; and as always, embraced the latest technologies to boost our long-held traditions.

As a result of these efforts, millions have been reached stateside and worldwide across numerous channels — both digital and traditional — to ensure the consumption and perception of beef remains stronger than ever. Beef continues to be steadfastly versatile, nutritious and above all, delicious.

So keep raising beef with pride – and together our dollars will continue to support the life we love.

JOAN RUSKAMP
Cattlemen’s Beef Board Chairman
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BOARD MEMBERS

PROMOTIONS

CONSUMER

INFORMATION

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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.

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

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 in U.S. beef.

Informs producers and importers about how their Beef Checkoff dollars are invested.

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.
BOARD MEMBERS
2018 Cattlemen’s Beef Board

Mary Jo Rideout  ARIZONA
Bruce Jackson

William Blackmon  COLORADO
Kent Bamford
Steven Hobbs
Hugh Sanburg
Jo Stanko
Cliff Coddington
Dwain Johnson

Jared Brackett  IDAHO
Lynn Keetch
Nick Brander
Sara Prescott
Norman Voyles
Stephanie Dykshorn
Cindy Greiman

Jenni Peters
Brian Sampson
Randall Debler
D.J. Edwards
Byron Lehman
Beth Patterson
Philip Perry

Kirsti Priest  KENTUCKY
Ryan Miller
Shane Wiseman
Amelia Kent
Ken Blight
Jeffrey Isenmann
Laurie Bryant

Sean Jones
Rob Williams
Steve Matthees
Ted Reichmann
Larry Jefcoat
Tammy Bartholomew
David Hutsell

Leon James
Bill McLaren
Katie Cooper
Lynda Grande
Turk Stovall
Bill Baldwin
Jim Eschliman

Kristy Lage
Torri Lienemann
Herbert Jones
Joan Huskamp
Bill King
Richard Brown
Robert Crabb
SEASON 10 OF NBC’S “AMERICAN NINJA WARRIOR” FEATURED LANCE PEKUS, A MUSCLE-BOUND CATTLE PRODUCER FROM IDAHO, HAMMERING HOME TO MILLIONS THAT BEEF IS A FOOD FOR STRENGTH. DIGITAL CONTENT FEATURED PEKUS SHARING BEEF-POWERED DIETS AND WORKOUTS, HIS PROUD BEEF-RAISING HERITAGE AND HIS MESSAGE ON RESPONSIBLE BEEF PRODUCTION.

RESULTS

+ 75,000 strength page views on BeefItsWhatsForDinner.com
+ Pekus’ beef-boosting content reached 30 million consumers
+ 8 million social media impressions

Spinach had Popeye, Beef has Lance Pekus
BEEF. IT’S WHAT’S FOR DINNER. SUCCESSFULLY RELAUNCHES BRAND

For more than 25 years, NCBA, on behalf of the Beef Checkoff, has managed the Beef. It’s What’s For Dinner. brand. In 2018, the brand was relaunched to promote beef’s unbeatable taste, quality production, variety, ease of cooking and sheer nutritional strength. A new logo, new website, new creative ad campaign and new content accompanied. The brand relaunch was an undeniable success attracting millions of views.

RESULTS
NCBA

+ 160+ million consumer touchpoints and positive beef messages this year alone
+ 60 million views from Nicely Done, Lance Pekus and Rethink the Ranch videos combined
+ 7,000+ Google keywords associated with beef running constantly
BEEFSHI MAKES ITS DEBUT

A new culinary concept that ‘beefs up’ traditional sushi was launched by the North American Meat Institute (NAMI), a contractor to the Beef Checkoff. Developed by a Culinary Institute of America-trained chef, Beefshi integrates prepared beef favorites — from pastrami and bologna, to hot dogs — into sushi style rolls. Eight videos, shot in a traditional sushi restaurant, depicted how to prepare each recipe. This generated considerable interest among consumers and retail and food service channel marketers.

RESULTS

+ Consumer reach generated through Beefshi Campaign: 9.9 million
BOLOGNA AND NEW RECIPES FOR SUCCESS

A bologna promotion in conjunction with the Jacksonville Jaguars was a success, reaching millions of consumers and generating fresh perspectives about bologna and the many ways to prepare it. A special bologna sandwich developed for concession sales at the Jaguars’ home games has also been a hit — selling out at every game. NAMI won a platinum Hermes Creative Award for December’s Jacksonville Jaguars bologna promotion done in conjunction with the National Hot Dog and Sausage Council (NHDSC) on behalf of the Beef Checkoff.

RESULTS

NAMI

+ Consumer reach generated through 400 media stories: 350 million
THE NORTHEAST BEEF PROMOTION INITIATIVE (NEBPI), A SUBCONTRACTOR TO THE BEEF CHECKOFF, LAUNCHED A THREE-MONTH PANDORA ADVERTISING BUY AND A NEARLY FIVE-MONTH SOCIAL MEDIA CAMPAIGN, UTILIZING NATIONAL AND REGIONAL PHOTOGRAPHY AND CREATIVE CONTENT — AS WELL AS A NEW ANTHEM VIDEO FOR BEEF. IT’S WHAT’S FOR DINNER.

RESULTS

+ 2.2 million Pandora and social media impressions across the Northeast
+ 78,000 engagements
+ 139,825 video views
TRANSFORMING CHEFS INTO INFLUENCERS

As part of the NEBPI’s 2018 plan — supported by the Beef Checkoff — eight professional chefs were media trained to promote beef. This first-of-its-kind training elevated regional chefs into advocates for beef, covering topics ranging from tailgating with beef, to easy weeknight meals, each highlighting beef’s nutrient profile and versatility during peak beef consumption times.

RESULTS

+ 13 on-air demonstrations across Northeast TV stations

RAISING DEMAND FOR BEEF

The American Farm Bureau Foundation for Agriculture (AFBFA), a contractor to the Beef Checkoff, hosted a series of On the Farm events in 2018. Out of the 81 responses it received from post-event surveys conducted after the On the Farm events, 28 percent said that “In the future, I plan to eat more beef than I currently consume.” The On the Farm events drive immediate beef demand among the participants, with a long-term goal to drive beef demand among future consumers.

RESULTS

+ Estimated educational reach: 20,000 teachers and 3.8 million students
EARNED MEDIA HIGHLIGHTS BEEF. IT’S WHAT’S FOR DINNER. RELAUNCH

The Beef. It’s What’s For Dinner. team worked with media to promote the relaunch of the brand and website. They secured placements in the Wall Street Journal, Omaha World-Herald, and Wichita Eagle, as well as numerous agriculture media outlets including BEEF Magazine, Capital Press, High Plains Journal, Drovers, and Feedstuffs.

RESULTS

NCBA

+ 114 million consumers reached in 2018

LEAN BEEF TOUTS BIG BENEFITS

Research from Purdue University — co-funded by the Beef Checkoff program — found that incorporating lean red meat into a Mediterranean-style eating pattern can have positive effects. To promote these findings, the Beef Checkoff hosted a well-attended webinar. NCBA, a contractor to the Beef Checkoff, pitched stories to top-tier media, a radio media tour, and booked a segment on Celebrity Page TV. The Beef. It’s What’s For Dinner. campaign partner and celebrity chef, Dan Churchill, was also featured in two live cooking segments on FOX & Friends.

RESULTS

NCBA

+ Content shared: 22 local TV stations as well as Newsweek
+ 97 million total consumer impressions
+ 1,597 webinar attendees
BEEF MEANS BUSINESS

Funded by the Beef Checkoff, NCBA developed a four-minute video targeting chefs and foodservice operators. Chef Adam Hegsted of the Washington State-based Eat Good Group explained how beef is good for his bottom line. With a variety of restaurant concepts ranging from high-end to fast casual, Hegsted appreciates beef’s craveability and versatility, also touting the innovative ways he menus beef across his restaurant portfolio — such as the Wandering Table’s famous Spaghetti-Stuffed Meatballs and the Gilded Unicorn’s highly shareable Sparkle Burger.

RESULTS

Content has more than 130,000 impressions to date
A New Deal on Veal

TO FURTHER PUSH THE EFFORTS OF THE VEAL QUALITY ASSURANCE (VQA) PROGRAM, FOUNDED IN 1990, A REVISED AND UPDATED CERTIFICATION PROCESS WAS IMPLEMENTED IN 2018 BY THE NORTH AMERICAN MEAT INSTITUTE (NAMI), A CONTRACTOR TO THE BEEF CHECKOFF. THE PROGRAM UPDATE WAS SPEARHEADED BY A TECHNICAL ADVISORY GROUP THAT INCLUDED VEAL FARMERS, VETERINARIANS, INDUSTRY EXPERTS AND KEY EXECUTIVES.

RESULTS
NAMI

+ U.S. milk-fed veal production complying with VQA: 95%
The Beef Quality Assurance (BQA) program finished 2018 strong in all certification categories.

The Checkoff-funded national Beef Quality Assurance (BQA) team traveled to Southern California for a set of BQA Transportation training events — among the first in-person training events of their kind. Attendees were exposed to new information about safe and responsible transportation of live cattle, which led to earning their BQA Transportation Certification.

*Based on number completed BQA certificates.
SMARTER PREPARATION FOR ANIMAL DISEASE OUTBREAK

NCBA, a contractor to the Beef Checkoff, participated in the first nationwide drill for Foot-and-Mouth Disease (FMD) to strengthen a plan of action preparing for a nationwide or global outbreak. Participants included USDA APHIS, Qualified State Beef Councils, state departments of agriculture, commodity groups as well as groups such as the Livestock Marketing Association (LMA), the North American Deer Farmers, and the Association of Zoos and Aquariums.

RESULTS

MORRIS

+ More than 22 groups participated in the nationwide drill

MAKING HEALTHY CONNECTIONS

The National Livestock Producers Association (NLPA), a contractor to the Beef Checkoff, hosted the annual Antibiotic Symposium and the subsequent beef producer trip to the Centers for Disease Control and Prevention (CDC). This provided a platform of transparency for one of the most critical health topics of our time, connecting beef producers with One Health stakeholders from the USDA, the FDA and the CDC. Uniting the One Health world with the beef community spawned new collaborative relationships between human and animal health, and most notably, a new antibiotic-focused event hosted at the Hy-Plains Feedyard.
STATE TOP ADVOCATES
The Beef Training and Engagement program hosted State Top Advocate training workshops for members from six Qualified State Beef Councils. The multi-day training events helped top advocates become even stronger ambassadors for beef by fortifying skills including communication strategies, beef nutrition, media interviews, live-streaming videos and handling tough questions.

MASTERS OF BEEF ADVOCACY
The Checkoff's Masters of Beef Advocacy training course continues to grow. Thousands from the beef community have completed the five online lessons to strengthen their skills as advocates for beef, answering consumer questions about beef and how cattle are raised.

RESULTS
11,000+ course graduates since 2009

USMEF contributed to the foreign outreach efforts that aided in driving a 9% increase in U.S. Beef exports year-over-year

18% increase in export value vs. previous year’s record pace

*Figures based on USDA data compiled by the U.S. Meat Export Federation.
U.S. BEEF GOES BRAZILIAN

Brazil reopened to U.S. beef in Fall 2016, with the first shipments arriving in Brazil April 2017. With support from the Beef Checkoff program, the USMEF launched U.S. beef’s return to Brazil with an educational seminar, inviting importers, distributors and representatives from major supermarket chains. USMEF also worked with an importer/distributor in Brazil to introduce “rolling billboards” — delivery vehicles featuring images of U.S. beef that were viewed by consumers in 44 Brazilian cities. Through September 2018, U.S. beef-muscle cut exports to Brazil totaled 1,122 metric tons.

RESULTS

+ 50% increase in U.S. beef exports to Brazil year-over-year

PROMOTING U.S. BEEF IN JAPAN BY THE POUND STEAK

Japan has traditionally been the leading international destination for U.S. beef, but ever-changing consumer tastes continue to create new opportunities for growth in Japan. With support from the Beef Checkoff program, the USMEF promoted thick-cut U.S. steaks in Japan, where steaks are typically served at six to eight ounces. The Beef Checkoff-funded ‘pound steak’ campaign is designed to convince restaurants, supermarkets and foodservice operators to serve steaks that are 15 to 16 ounces. These efforts have contributed to another banner year for U.S. beef exports to Japan.

RESULTS

+ 7% increase in U.S. beef exports to Japan year-over-year*

*Figures based on USDA data compiled by the U.S. Meat Export Federation.
When Opportunity Knocks, Open Doors

To achieve the Cattlemen’s Beef Board’s (CBB) producer communication objectives in 2018, they focused efforts on the producer journey as it related to the typical cattle farmer and rancher’s understanding and attitudes about the beef checkoff. Through the Open Doors campaign, they brought facts to life by taking the audience on that journey, showing them the opportunities behind each door the checkoff opened.

Results

- 36 million impressions targeting producers
- 250,000 engagements or interactions with the content distributed
INTEGRATION WITH STATE BEEF COUNCILS

This year, there were efforts to work seamlessly with Qualified State Beef Councils so messaging could be extended and customized with local producers. The Beef Checkoff continues to work with states on their individual projects, providing design and production services, and other assistance.

RESULTS

+ 2018 efforts showed collaboration with 19 states

A YEAR OF CHANGES AND NEW VISION

In the spring of 2018, a task force consisting of five producer representatives conducted a formal request for proposal process to identify a new advertising agency to support the producer outreach efforts of the Beef Checkoff. As a result of these efforts, in 2019, the CBB will be working with Swanson Russell, a diverse branding, marketing and public relations agency based out of Lincoln, Nebraska.

PRODUCER ATTITUDE SURVEY

The CBB continued the practice of conducting an annual Producer Attitude Survey, the Beef Checkoff’s tool to receive input from producers and set benchmarks for communicating with farmers and ranchers in the future. The results showed cattle families continue to have very favorable attitudes toward the Beef Checkoff program and have been very consistent in their support over time. Currently, about three out of four producers approve of the program.

RESULTS

+ Overall approval rating is 5 points higher year-over-year*

*According to the January 2018 annual Producer Attitude Survey.
Retail Beef Demand Index: The Highest in Six Years

Retail meat case sales of beef for January through May 2018, compared to a year ago, have increased 7.5 percent in dollars and 5.2 percent in pounds. The average retail price in 2018 is 2.2 percent higher. Strong ground beef sales have been the primary driver behind the higher total beef sales.*

*Source: Tonsor, Schroeder, Creating and Assessing Candidate Food Service and Retail Beef Demand Indices, January 2017. IRI/Freshlook, Total US MULO ending 7/1/18; categorized by VMMeat System.
STEAK SATISFACTION REMAINS STRONG

Taste has always been the most important factor for consumers when deciding what to eat for dinner. The results of the Beef Checkoff’s March 2018 Steak Satisfaction Tracker show this continues to be the main driving factor in beef purchases.

*According to 2018 Steak Satisfaction Tracker.
CONSUMER BEEF TRACKER

Over the last year, the market research team at NCBA, a contractor to the Beef Checkoff, has refined and launched a new Consumer Beef Tracker, replacing the former Consumer Beef Index (CBI) and Consumer Image Index (CII). Data from this tracker showed that 65 percent of consumers felt positive about beef, with another 23 percent feeling neutral, and only 12 percent feeling negative about beef overall. Similar to what has been seen historically, ‘was great tasting’ is the top thing consumers considered when making a meal decision.

THE ROLE OF CATTLE IN SUSTAINABLE FOOD SYSTEMS

A new publication discussing beef’s role in a healthy, sustainable diet was in the July/August 2018 issue of Nutrition Today. Livestock produces more than one-third of the world’s protein, and ruminant animals have the unique capacity to upcycle human-inedible feedstuffs into high-quality protein. By being a part of the global food system, livestock enhances the sustainability of other food production and industries. This article was one of the top two articles downloaded from Nutrition Today in 2018.
BEEF SAFETY RESEARCH AND POSITIVE IMPACT

Beef Checkoff-funded post-harvest beef safety research activities administered by the Foundation for Meat and Poultry Research and Education (FMPRE), a contractor to the Beef Checkoff, resulted in the completion of five major research projects and the initiation of seven research projects addressing critical knowledge gaps. The microbial threat is constantly evolving. Beef Checkoff investments support research to improve the safety of beef products, and ultimately, drive demand by building and enhancing consumer trust. Without a doubt, the Beef Checkoff-funded research has saved lives and been instrumental in preventing numerous foodborne illnesses. Producers and their Checkoff leaders should take pride in their legacy of a positive impact on public health, now and for years to come.

RESULTS

FMPRE

7 research projects have been initiated on critical topics including antimicrobial and pathogenic interventions, beef export safety and more

BEEF SUBSTITUTE SALES AT RETAIL

Research showed beef substitutes make up about one percent of market share. While beef substitute sales increased at a 25 percent annual rate over the past year, their $53 million sales increase was dwarfed by the $1.24 billion increase in beef sales.

NCBA

BEEF
$25,412,971,693
98.98% *

BEEF SUBSTITUTES
$261,194,360
1.02% *

*Source: IRI, Refrigerated/Frozen Meat Substitutes, 52 weeks ending 6/16/18; IRI/Freshlook, Total US MULO ending 5/28/18; Categorized by VMMeat System.
## CATTLEMEN’S BEEF PROMOTION AND RESEARCH BOARD

Statement of Assets, Liabilities and Net Assets
September 30, 2018 and September 30, 2017

### ASSETS

<table>
<thead>
<tr>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$9,250,308</td>
</tr>
<tr>
<td>Short-term investments</td>
<td>$9,000,000</td>
</tr>
<tr>
<td>Long-term investments</td>
<td>$5,500,000</td>
</tr>
<tr>
<td>Capital assets, net of accumulated depreciation of $74,768 and $70,652</td>
<td>$5,129</td>
</tr>
<tr>
<td>Other</td>
<td>– $480</td>
</tr>
</tbody>
</table>

**TOTAL ASSETS** $23,755,437 $20,416,936

### LIABILITIES & NET ASSETS

<table>
<thead>
<tr>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due to state beef councils and other</td>
<td>$2,622</td>
</tr>
<tr>
<td>Due to Montana Beef Council</td>
<td>$577,547</td>
</tr>
</tbody>
</table>

Net Assets, Unrestricted:

- Designated for future expenses $16,020,917 $15,025,245
- Designated – Board reserve $4,350,000 $4,350,000
- Undesignated $2,804,351 $975,424

**TOTAL LIABILITIES & NET ASSETS** $23,755,437 $20,416,936

### REVENUES

<table>
<thead>
<tr>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessments</td>
<td>$42,560,297</td>
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<tr>
<td>Interest</td>
<td>$155,700</td>
</tr>
<tr>
<td>Other</td>
<td>$42,763</td>
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</tbody>
</table>

**TOTAL REVENUES** $42,758,760 $41,055,902

### EXPENSES

**Program Expenses:**

- Promotion $9,225,691 $7,871,078
- Research $8,042,093 $9,102,863
- Consumer information $7,345,798 $7,913,258
- Industry information $3,560,607 $4,180,808
- Foreign marketing $7,640,567 $8,140,797
- Producer communications $1,179,898 $1,498,613
- Program evaluation $230,795 $202,832
- Program development $295,075 $292,090

**TOTAL PROGRAM EXPENSES** $37,520,524 $39,202,339

**Supporting Services:**

- USDA oversight $601,681 $465,853
- Administration $1,811,956 $1,796,725

**TOTAL EXPENSES** $39,934,164 $41,464,917

### ASSESSMENT REVENUES

#### Qualified State Beef Councils 2018

<table>
<thead>
<tr>
<th>State</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama</td>
<td>$359,353</td>
</tr>
<tr>
<td>Arizona</td>
<td>$323,279</td>
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<tr>
<td>Arkansas</td>
<td>$424,437</td>
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<td>California</td>
<td>$1,859,405</td>
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<tr>
<td>Colorado</td>
<td>$1,614,571</td>
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<tr>
<td>Delaware</td>
<td>$4,188</td>
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<tr>
<td>Florida</td>
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<td>Georgia</td>
<td>$283,119</td>
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<td>Hawaii</td>
<td>$18,898</td>
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<td>Idaho</td>
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<td>Illinois</td>
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<td>Kentucky</td>
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<td>Louisiana</td>
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<td>Maryland</td>
<td>$43,080</td>
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<td>Pennsylvania</td>
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<td>South Carolina</td>
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<td>Virginia</td>
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<td>Washington</td>
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<td>West Virginia*</td>
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<td>Wisconsin</td>
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<tr>
<td>Wyoming</td>
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**TOTAL QUALIFIED STATE BEEF** $35,303,797

#### States Without Qualified State Beef Councils

<table>
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<tr>
<th>State</th>
<th>2018</th>
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<td>$204</td>
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<tr>
<td>Connecticut</td>
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<td>Massachusetts</td>
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<td>Maine</td>
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<tr>
<td>New Hampshire</td>
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<tr>
<td>Rhode Island</td>
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<tr>
<td>West Virginia*</td>
<td>$129,015</td>
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**TOTAL STATES WITHOUT QUALIFIED STATE BEEF COUNCILS** $204,955

**TOTAL ASSESSMENT REVENUES** $42,560,297

*West Virginia became a Qualified State Beef Council as of June 1, 2018.*