



MARKETING LOCALLY RAISED BEEF

Lessons Learned from
Tennessee Value-Added
Beef Producer Focus Groups



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Twenty-six value-added beef producers representing 18 farms

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Introduction

Three focus group meetings were hosted in December 2013 and January 2014 to explore Tennessee beef producers' experiences with marketing value-added beef. The purpose of these focus groups was to gather information about market opportunities and constraints faced by value-added beef producers in order to develop educational materials for interested farmers and industry partners. A total of 26 individuals representing 18 farms participated in the focus groups. The meetings were held in Murfreesboro, Pleasant View, and Pigeon Forge, Tennessee. The number of participants and farms by focus group location is presented in Table 1.

Table 1. Participants by Tennessee Value-Added Beef Producer Focus Group Location

Location	Number of People	Number of Farms Represented
Murfreesboro	12	7
Pleasant View	8	6
Pigeon Forge	6	5
Total	26	18

Participants were asked to provide basic information about themselves and their farm operations. Topics discussed during the focus group meetings included market channels used, customer characteristics and preferences, promotional methods used, pricing techniques, payment methods accepted, and barriers faced when selling value-added beef. This publication summarizes findings from the focus group meetings. All information presented is based on participant experience with value-added beef production and marketing and perceptions of market opportunities.

Producer and Farm Profiles

Focus group participants were asked to provide some demographic information about themselves. Participants consisted of 15 males and 11 females. The average age of participants was 51 years, with an age range between 32 and 81 years of age. Seventeen participants identified an ethnic heritage: 15 “White/Caucasian,” one “African American” and one “American.”

Participants listed 22 counties where they had farms located, including one county in Kentucky. Acres owned ranged from 5 to 1,400 acres. Leased acres ranged from 25 to 1,000 acres. One producer did not own any land, and 10 producers did not lease any land. Average owned and leased acres were approximately 312 and 331, respectively.

Producers were also asked to provide some information about their beef marketing operations. On average, participants indicated about eight years of experience marketing beef directly to consumers, with a range of eight months to 50 years of experience. Participants estimated they had marketed between three and 120 head of cattle as meat to consumers in the last 12 months. On average, participants marketed 28 head.

Data describing focus group participants and their beef marketing operations are summarized in Table 2.

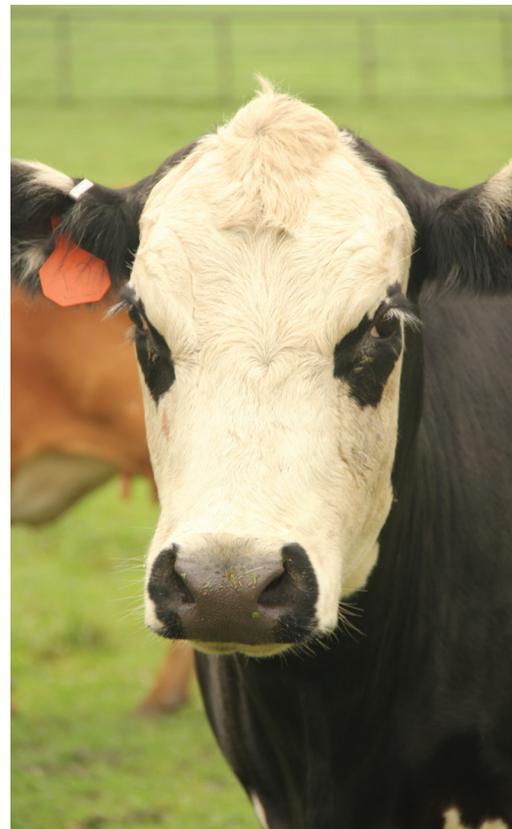


Table 2: Data Describing Tennessee Value-Added Beef Producer Focus Group Participants and Farms

Description	Minimum	Maximum	Mean	Median	Number	Percent
Gender						
Male					15	57.7
Female					11	42.3
Age (years)	32	81	51			
Farm Size (Acres)*						
Leased	25	1,000	330.6	160.0		
Owned	5	1,400	311.6	140.0		
Meat Marketing Experience	8 months	50 Years	8.3 Years	4.3 Years		
Approximate Head Marketed as Meat in Last 12 Months	3	120	28	15		

*Excludes farms reporting zero acres owned or leased.

Producers were also asked to list any other products they directly market to consumers. Seven producers marketed pork, and five sold eggs. Four producers marketed chicken and/or vegetables. Two producers indicated they sold blueberries, lamb and/or honey. Other products included organic grain, beefalo, bison, rabbit, jams and relish, goats, blackberries, turkeys, squirrel corn, and hay. Five producers did not direct market any other products.

Market Channels Used: Pros and Cons

A variety of markets were used by the value-added beef producers. Although most producers were selling through more than one market type, a couple of producers sold almost exclusively from their farms and one producer sold primarily to a restaurant. Some market types had similar advantages and disadvantages.

On-farm sales were conducted by most producers because this method minimized producers' time invested in selling beef (e.g., compared to farmers markets). Of the 10 producers selling from the farm, two sold only live animals in half or quarter shares rather than individual beef cuts. Some producers used other market opportunities, such as farmers markets, to build a customer base and then transitioned these customers to direct from-the-farm buyers. Producers who used this market outlet found benefits significantly outweigh the drawbacks and find most of the drawbacks manageable. Several producers noted this outlet keeps customers best connected with their farms. Some producers found liability issues, such as customer injuries that could occur on the farm premises and having customers invading their personal space, off-putting.

Farmers markets were used by nine focus groups participants. Four producers had previously used farmers markets but did not at the time of the focus group meetings. Producers noted time investment and logistical burden associated with farmers markets as factors that seem to keep producers from using this market outlet. Those who have had success using farmers markets point to sales volume and repeat customers as key benefits. Producers note that a first-time buyer at a farmers market will likely buy a small quantity of ground beef, and thereafter venture into different cuts and larger volumes.



Four of the 18 farms sold value-added beef through specialty grocers or butcher shops with a focus on local products. Several producers indicated they could not get retail prices through these market outlets, but those producers using these outlets found the consistency and volume of sales compensated for the lower wholesale price. Two of the four retail outlets used by producers accept half a carcass for further processing rather than individual cuts, which decreases the processing costs for the producer.

Producer opinions of restaurants as a market outlet, from the four farms that marketed their value-added beef through this outlet, are quite similar to those of grocers/retail outlets. However, restaurant sales may be less stable as some producers experienced unexpected order changes or cancellations.

Two producers offered CSAs¹, but one of the two sold to a market that arranged the CSA. This outlet is beneficial due to the preorder and prepayment characteristics of CSAs, however, the price is fixed at the beginning of the season.

One producer used LocalHarvest.org, a free online local food marketing service. Producers may also build an online store and conduct e-commerce through LocalHarvest.org. One producer had an independent online store. Several other producers marketed using a website but made the sales transaction through subsequent phone contact. Online sales offered potential exposure to a large number of people and facilitates delivery of information. The logistics and expense of delivering or shipping product was cited as a disadvantage as were sales commissions from e-commerce sites.

Word of mouth, retail room in a harvest and processing facility, the Pick Tennessee Products website and Facebook were also mentioned by producers as marketing channels used. Several of the market channels used by focus groups participants with pros and cons identified by users of each market are presented in Table 3.



¹CSA is the abbreviation for Community Supported Agriculture. Various types of CSAs exist. Producers are cautioned to adhere to all regulations for meat sales, including Weights and Measures regulations. More information is available in Retail Meat Sales in Tennessee: Basic Weights and Measures Regulations (D1) at extension.tennessee.edu/publications/Documents/D1.pdf.

Table 3. Pros and Cons of Markets Channels Used by Tennessee Value-Added Beef Focus Group Participants

	Pros	Cons
On-Farm Sales	Producer is able to set prices, and payment is immediate.	Requires an established clientele, so it is not an ideal market outlet for new producers.
	Margins are good as there are little to no transaction costs (e.g., booth space or delivery fees), and there is less labor/time associated with marketing activities. There is no need to pack and transport product and equipment.	Location of the farm is an important factor for success. On-farm sales may be challenging for more remote or difficult-to-access farms.
	Schedules are set by the producer, and sales may be scheduled by appointment only.	The shopping experience must meet customer needs and expectations, e.g. the farm should be clean and well-kept, and bathroom access may be needed by customers.
	Schedules are set by the producer, and sales may be scheduled by appointment only.	Significant freezer storage may be required.
	Facilitates year-round sales.	Added risk of liability associated with customer visits to the farm.
	Creates opportunity to develop a customer email database to use in future marketing efforts.	Scheduling can be challenging. Customers miss scheduled appointments, and customers sometimes arrive without an appointment.
	Builds repeat customers by providing a farm experience to customers. Most customers are interested in seeing the source of the product. One producer describes the on-farm sales process as evolving from "We used to sell cows. Now we sell cows and relationships." Another producer noted that the experience is the key selling point of this outlet and mentioned "If they arrive with a child, they'll be coming back."	Must obtain certification. ² While this is noted as a "con" because some producers thought the certification process would be complicated or time-consuming, those producers who had gone through the process indicated the process was not as difficult as they expected.
	Provides an opportunity to sell other farm products and cross-promote beef sales and on-farm events such as summer camps and field trips.	
	Ability to pre-sell a large share of beef going to the processor.	
	Producers may be able to offer more variety in cuts, and customers can be informed in advance what cuts are available.	
Ability to communicate with the customer prior to the visit may help prepare the customer for what to expect and create a more positive experience, e.g. scheduling of visit, payment options accepted.		

²"Certification" refers to the Farm-Based Retail Meat Sales Permit required by the Tennessee Department of Agriculture for any retail sale of meat. More information about regulations for marketing beef, pork, lamb and goat may be found online at extension.tennessee.edu/publications/Documents/PB1829.pdf.

Table 3. Pros and Cons of Markets Channels Used by Tennessee Value-Added Beef Focus Group Participants (continued)

	Pros	Cons
Farmers Market	Producer sets the price.	Time consuming – the producer must be away from the farm for many hours (including travel and time at the market).
	Builds repeat customers by being at the same location over time.	Logistics can be challenging. Producers must load, unload and transport product. A lot of equipment may be needed (e.g., freezers, inverters, generators, tables, signage).
	Creates exposure and opportunities to make contacts to explore other market opportunities (e.g., restaurants).	Producers must arrive early to get in place and set up before pathways are blocked.
	Can build a customer base for year-round sales.	Preferred or reserved spaces at larger markets sometimes go to vendors who have long-term relationships with the market organizers.
		Producers must invest time in building trust with buyers, especially in addressing product safety issues.
		Accepting credit cards is essential.
		Sales volume can be highly variable from week to week due to factors such as customer traffic or weather. Customers may also be seeking cuts not available in the producer's inventory at the market.
		Consumers may not expect to see beef at the market, so the producer must invest a few weeks of "face time" to acclimate customers to their presence. The producers who successfully market at farmers markets noted consistency of attendance was important to building clientele at farmers markets. Sales may start slow as initially consumers made small "test" purchases before becoming regular customers.
	Most farmers markets are seasonal, and the overlap with the beef production cycle is not ideal.	



Table 3. Pros and Cons of Markets Channels Used by Tennessee Value-Added Beef Focus Group Participants (continued)

	Pros	Cons
Grocery Stores and Butcher Shops	Enable high-volume sales, relatively consistent timing of sales and winter sales that make up for lulls in farmers market sales.	Producer receives a wholesale/discounted sales price rather than full retail price.
	Provide excellent exposure of the farm brand to consumers.	Some logistical burden because farmer must deliver to the stores.
	The butcher shop and one of the grocers with a butcher shop in the store provide further processing, therefore some of the processing cost is incurred by the store and not the producer.	The farmer must invest time to establish relationships with retail outlets.
	Producers who use this market outlet described the marketing burden per unit of sales less than that associated with other market outlets. Time investment in product sales is limited to traveling to the processor which would be required to sell through any market outlet. Producers estimate this as one day per week.	A wholesaler must register as a wholesale meat handler with USDA FSIS. ³ (Producers who have registered described the process as fairly simple, and there is no fee associated with registration.)
Restaurants	Enable high-volume sales.	Some restaurant product requirements exclude smaller producers.
	Depending on the restaurant, demand can be consistent and year-round.	Depending on the restaurant, demand can be inconsistent and unpredictable (restaurants sometimes reverse or withdraw orders).
	Provide exposure to the brand (assuming the farm/producer is identified by the restaurant in the menu or other promotional materials).	Price is well below retail, and buyers pressure producers for price discounts.
	May accept fresh or frozen product.	Demand is limited mostly to steaks and ground beef.

³Producers interested in registering as a wholesaler can learn how in extension.tennessee.edu/publications/Documents/PB1829.pdf.

Table 3. Pros and Cons of Markets Channels Used by Tennessee Value-Added Beef Focus Group Participants (continued)

	Pros	Cons
CSAs	<p>Costs are covered up-front since CSAs are by subscription and are typically prepaid.</p> <p>Producers know what and how much product is needed on a scheduled timeline.</p> <p>Producer can determine what goes in the package, so cuts that might not sell well (e.g., roasts) are moved⁵.</p>	<p>The price is fixed at the beginning of the subscription period (typically six months or a year), so if production costs change, producers may not be able to earn the profit margin they expected.</p>
LocalHarvest.org	<p>Listing is free.</p> <p>Facilitates online sales without the producer having to be concerned with managing a website or payments.</p> <p>Producer sets the price.</p>	<p>Payments are significantly delayed through the e-commerce option.</p> <p>LocalHarvest.org takes a commission from e-commerce sales.</p>
General Online Sales	<p>Potential to reach a large number of customers.</p> <p>Facilitates easy delivery of information.</p>	<p>Requires effort to maintain a consistent customer base.</p> <p>Packing and shipping are expensive, and dry ice cannot be stored.</p>

⁵To assure satisfaction with the cuts, the producers provide cooking instructions and recipes.

Value-Added Beef Customers and Marketing Strategies

It is important for farmers interested in marketing beef to understand the consumers who may be willing to purchase it. Focus group participants shared information about their customers and how producers marketed to consumers.

Characteristics and Information They Want to Know

Producers described their typical value-added beef customer as one who wants to know detailed information about the product. Producers report that customers' questions trend with what is being discussed in the media. Questions usually asked by the average customer include:

1. How was the animal raised (including whether it was grain or grass fed)?
2. Were antibiotics and hormones given to the animal?
3. Was the animal confined?
4. How was the animal finished?
5. Was the feed genetically modified?
6. Is the product organic, natural, and/or local?

Producers report customers also have questions about product price, but, for many customers, the pricing questions are secondary to other questions (i.e., they occur after the conditions in which the animal was raised are discussed). Some customers do ask why this beef is more expensive than "at the grocery store."

Producers also reported customers are interested in the general nature of the farm from which the beef comes. They want to know whether the farmer is a full-time farmer and whether the operation produces products other than beef.

Some customers are unaware that the livestock must go to the processor and ask if the producer processes them. Some customers ask whether the beef is USDA inspected or whether the processor is USDA inspected. Other questions relating to processing involve fresh vs. frozen beef. Customers who are involved in a sale where the product is not present ask whether they will get fresh or frozen beef. This is the producer's opportunity to explain why the beef is frozen and how it relates to quality. At markets where the customer sees that the beef is frozen, many will ask why there is not fresh beef available.



Although some producers say their customers are individuals in a middle or upper-middle class, others report that customers' income varies, although most have discretionary income. Those with lower incomes buy less expensive items such as ground beef and soup bones. Producers noted different farmers markets draw different types of customers, and rural markets tend to draw customers from a wide income range.

Customers' ages vary. One producer reported older customers are seeking "beef like they had when they were growing up." Younger customers are often those who are looking for meat without added hormones.

Both men and women are represented among customers, although there seem to be more female purchasers. Both genders seem motivated by qualities of the product. According to a producer who sells Kobe beef, buyers are mostly men who are looking for well-marbled beef. Female customers appear to be motivated more by product health benefits.

Producers observed special segments among customers. One group was customers with special health needs, particularly customers who had gastric bypass surgery or who had serious illness. Various ethnic groups were often looking for specialty cuts such as oxtail or tongue.

Strategies to Attract and Keep Customers

Producers noted they have to educate customers if they want to succeed in the value-added beef business. All new customers have many questions. Furthermore, customers must have additional information – typically beyond the information they seek – to assure that they understand the product and how to prepare it so that they do not diminish its quality. Information many customers do not seek, but need, relates to cooking loss and cooking methods. Producers provide information about cooking loss to help customers consider the difference between cost per pound of meat bought at the grocery store and meat buy directly from the producer, which, when cooked, retains more of its raw weight according to focus group participants. Producers also offer cooking instructions, especially for products other than ground beef, since ideal cooking temperatures and times can differ.

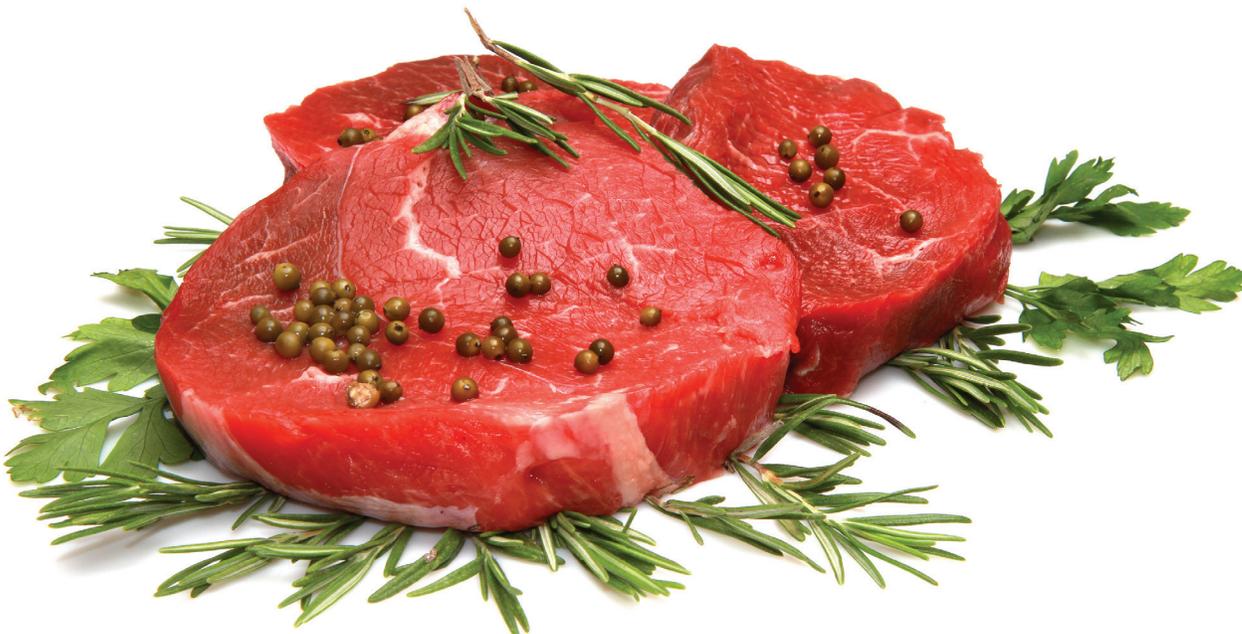


Customer Preferences for Beef Characteristics and Cuts

The characteristics of the beef that customers appreciate are reflected in the questions they pose to producers (e.g., locally raised, without added hormones or antibiotics). Additionally, producers believe customers return because, once they have cooked and eaten the beef, they find the product to be of high quality, having good flavor and texture and is easy to digest. Customers are aware this product is without preservatives or added colors.

The cuts sold by producers varied based on market outlet, season and buyers' preferences. Farmers market vendors reported new customers initially purchased primarily ground beef or, less frequently, steaks. Producers who marketed on the farm and/or at a farmers market note that customers' initial purchases may be limited in variety (i.e., primarily ground beef and steaks), but over time, and sometimes with encouragement of the producer, customers will expand the type of cuts they buy. For several producers, ground meat and steaks remained the primary cuts sold. A few of the producers make processing requests based on special orders, producing cuts like tenderloin and standing rib roast or newer cuts like flat iron and Denver cut steak. Several producers sold roasts only by special order, others sold them routinely, especially during winter. A few producers sold a 10-pound package of different cuts.⁶ Producers marketed less popular cuts by featuring a recipe that highlights that cut. Some producers were adding value by selling bones and liver for pet treats (where the liver is dried and baked into dog treats). Others gave away these products.

⁶Weights and Measures regulations indicate meat must be sold by net weight and cannot be sold by the piece, package or bundle of packages. Learn more at extension.tennessee.edu/publications/Documents/D1.pdf.



Purchasing Frequency and Volume

Producers noted customer purchasing frequencies and volumes vary widely but were dependent on the customers' freezer capacity. While most customers of the Pigeon Forge (East Tennessee) focus group participants were weekly buyers who purchased only a small amount, in other regions, purchase volumes seemed to be larger and frequencies more varied. Bulk-beef buyers were typically once-a-year customers. Customers buying individual cuts were weekly buyers but also included those who bought 10-pound packages monthly or made a \$100 purchase of a variety of cuts.

Packaging

All producers used vacuum sealed packaging because it maintains the quality of the product and consumers want to see the product. Customers usually want ground beef in 1-pound packages and steaks packaged individually.



Fresh vs. Frozen

Most of the products were sold frozen, except for sales delivered weekly to a restaurant, sales to a market and butcher shop, and occasional special orders. Whether the meat is fresh or frozen is a question routinely asked by first-time buyers, and most of them prefer fresh beef initially. Customers have preconceptions that quality is diminished because the product is frozen. The typical customer does not know that almost all store-bought meat has been previously frozen. Producers stated they must educate consumers about the relationship between quality and freezing. Producers reported occasionally losing a direct-to-consumer sale because the beef is frozen. However, they also reported customers who try frozen beef from a local producer return and have no objection to frozen beef thereafter.





Pricing

Producers used various techniques for pricing their beef. Every producer compared prices to traditional stores and specialty stores. Some producers reported only checking their competitors' prices, with competitors including specialty meat companies such as Omaha Steaks and higher end natural/organic stores such as Earth Fare. Several producers mentioned tracking input costs and setting a price to cover those costs.

One producer set different prices for each farmers market. Another producer noted that, once customers and the reputation product were established, price could be set at any level because customers valued the unique product characteristics compared to products sold through mainstream sources (i.e., groceries and big box stores). Some producers recommended "testing" prices with customers to make sure they sell for the top price that the customers are willing to pay.

Payment Types

Producers noted accepting credit cards payments may be important to avoid lost sales. Customers at farmers markets expect to be able to use credit cards, and therefore, some producers use wireless technologies (e.g., Square) that allow them to easily accept credit cards.

For on-farm sales, many producers limited payment to check (for established customers) or cash. Types of payment accepted are listed on promotional materials and discussed before the buyer arrives.

Only one producer accepted EBT directly. Producers perceived EBT monthly fees to be cost prohibitive. Some farmers markets are equipped to accept EBT, and producers can be paid through the market's system.

Marketing/Promotional Methods

Producers implemented a variety of promotional methods to market their products including websites and social media, email, newspaper ads, referral bonuses, first-time buyer discounts, and product donations. Producers who offer on-farm sales noted they market the farm experience rather than just a product.

- Websites, social media and online tools use by producers include:
- Producer/farm-specific websites and blogs.
- Social media sites (Facebook and Twitter) where producers post pictures and stories from their farms. Producers noted the need to monitor comments on these sites, as negative comments can be a liability.
- “Buy local” promotional sites: PickTNProducts.org, LocalHarvest.org, Local table.
- Craigslist.

Most producers used email to promote their products, using lists of addresses of existing customers and individuals who request information at farmers markets or other events. Email contact was used to announce availability of product, set up sales dates, and distribute newsletters and recipes. Producers used email to share information about the product and maintain interest.

A few producers used newspapers to advertise their products. One producer offered existing customers a bonus on their next purchase for referring a new customer. Most producers did not use discounts or sales as marketing techniques, although one mentioned using a “first-time buyers” discount at a farmers market. When specifically asked, producers indicated they informed consumers they would not have to pay sales tax on their meat purchases, in cases where producers were exempt from collecting and remitting sales tax.

Some producers donated products for special events, e.g., silent auctions and benefit dinners. One producer noted “making donations markets your name, and donations have a snowball effect.”



Barriers to Marketing Value-added Beef

Producers were asked to identify challenges they experienced or continue to experience as sellers of Tennessee-grown value-added beef. The issues they identified ranged from logistical/operational issues to the lack of understanding about food and food culture in the United States. Barriers discussed are listed in Table 4 by categories including start-up challenges, operational/ongoing challenges, scaling up challenges and market/societal issues.

Table 4. Barriers to Marketing Value-Added Beef Cited by Tennessee Value-Added Beef Producer Focus Group Participants

Start-up Challenges	Front-end investment of time: From start-up to first sales can be 20-30 months, so some producers buy calves and finish them.
	Building the customer base requires considerable investment of time.
	Certifications and regulations are described as initially “intimidating” but ultimately “doable,” and not seen as a barrier.
Logistics	Time and energy – several of the producers have off-farm jobs ⁷
	Production costs can be highly variable because of swings in feed prices, calf prices and weather.
	Farmers markets are time consuming and exhausting.
	Need to educate the customers about the cost difference between Tennessee value-added beef and the stores’ products.
	Distance to a USDA-inspected processor. Drive times for many beef producers are well over an hour, one way.
	Limited availability of processors. It can be helpful to schedule far in advance and to schedule processing on a regular basis.
Scaling Up	Costs associated with scaling up are significant, especially land prices, and it is difficult to borrow capital because lenders have little experience with this type of market.
	Finding good labor makes expansion difficult or impossible.
Market and Customers Beliefs	Some local restaurants do not support local beef (this was only mentioned at the Pleasant View focus group) and expect the product to be priced like Sysco Food Service items.
	People do not understand the value of the product or the sources of their food, e.g., buyer saying, “I won’t eat any meat that comes from a farm.”

⁷This information was not asked of or reported by all participants. Several participants did mention other, off-farm jobs and their limited time available because of them.

Summary

Twenty-six producers representing 18 Tennessee value-added beef enterprises shared information about their operations and experiences in three focus groups held in December 2013 and January 2014. Participants exhibited a wide range of experience in direct marketing beef from eight months to 50 years and the number of head sold in the last year between three and 120. Market channels used included on-farm sales, farmers markets, restaurants, stores and e-commerce with on-farm sales and farmers markets used by the most producers. Producers noted specific advantages and disadvantages to each market type. Producers indicated customers asked a variety of questions about animal raising practices and product characteristics. Steak and ground beef were the most popular products. Customers desired 1-pound packages of ground beef and single steak packages. All producers used vacuum packaging. Producers considered various factors in setting prices with some tracking input costs, others checking competitor prices, and some testing prices to identify customer willingness to pay. Producers indicated accepting credit cards was beneficial to making sales. Only one producer accepted food stamps (EBT). Promotional methods used by producers included websites, blogs, social media sites, email, newspaper ads, donations, and discounts for referrals and first-time buyers. Participants identified several barriers to marketing value-added beef that may be categorized as start-up, logistics, scaling up, and market and customer beliefs.





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