



BEEF

The beef cattle sector is the single largest sector in the Kansas agriculture industry and is recognized nationally and globally for raising healthy cattle and producing high-quality beef. Kansas has the third largest number of cattle on ranches and feedyards and has a significant role in the nation's beef processing as well. Resources to support beef cattle are plentiful in Kansas, from the abundant feed supply to the pastureland to the efforts to conserve the water supply. The beef industry in Kansas includes leaders throughout the supply chain, as well as in research, health, marketing and advocacy. Agriculture-related education is a source of strength in the state. The beef cattle industry is well respected on a state and national level which has led to strong support from state and federal policy makers and agriculture agencies.

In addition to concerns of weather and fluctuating prices, challenges facing the beef cattle industry threaten to prevent its continued success. A number of local, state and federal policies have the potential to directly affect the beef industry, from transportation to environmental regulations and international trade. Fluctuating land prices, changes in land use, and generational transfer add to the challenges the industry must continue to address. The ability to access



markets — either physically or electronically — is critical to future success in the industry. There is a need to continue improving infrastructure to deliver products and information. The workforce required to maintain successful beef operations involves issues of education and immigration which adds complexity to operation management and sustainability, especially as the industry continues to become more competitive.

As the beef industry adapts to meet consumer demands, it must identify goals for strategic growth based on competitive advantages of raising and feeding cattle and processing beef in Kansas. Coordination between public and private leaders within the industry will direct efforts toward navigating the barriers which could prevent growth. A focus on workforce education, industry communication and policy development will assist in identifying opportunities to expand or grow the Kansas beef cattle sector. Collaboration will be key to developing a long-term growth strategy for the Kansas beef cattle industry, a strategy that not only builds upon earned brand equity and the tradition of this industry, but that encourages growth and future prosperity for the Kansas beef cattle community.

STATUS

The beef cattle sector has been and continues to be the single largest sector in the Kansas agriculture industry, with cattle and calves generating \$8.27 billion in cash receipts in 2017, which accounted for more than 50 percent of Kansas agricultural cash receipts that year. Not only does Kansas have the third largest number of cattle on ranches and feedyards at 6.35 million on Jan. 1, 2019, the state also has a significant footprint in the cattle processing sector. In 2017, Kansas produced nearly 5.69 billion pounds of red meat, or nearly 11 percent of the nation's total.

According to estimates prepared by the Kansas Department of Agriculture and based on the IMPLAN economic data model, beef cattle farming and ranching has a direct output of approximately \$6.3 billion and employs nearly 34,130 Kansans. In addition, animal slaughtering and meat processed from carcasses, except poultry, has a direct output of \$11.2 billion and supports a total of 17,292 jobs.

The beef industry is also recognized nationally and globally for raising healthy cattle and producing the beef which consumers demand. In 2017, exports of beef and beef products from Kansas totaled over \$1.25 billion, the largest export value in the past five years. Beef and beef product exports from Kansas have accounted for between 18 and 26 percent of total U.S. beef exports for each of the last five years. As the global middle class continues to grow, it is expected that global demand for protein will also increase, adding more value to cattle raised in Kansas. Through July 2018, the U.S. Meat Export Federation estimates that exports have added \$318.31 per head in value.

The success of the Kansas beef cattle industry has not come without significant challenges, though. Volatile markets, regulatory challenges, weather extremes and natural disasters, and a growing number of anti-agriculture and anti-meat activists spreading false information regarding cattle production practices and beef nutrition can make it difficult for the entire beef cattle community.

OPPORTUNITIES

In order to develop a strategic growth plan for the beef cattle community, it is important to understand the areas where Kansas has a comparative advantage and the best opportunities for growth or expansion.

Factor	Implications for Growth and Development Opportunities
Biosecurity	The Kansas beef industry has been aggressive and progressive in advancing biosecurity and foreign animal disease preparedness. In addition to participation in KDA-led foreign animal disease exercises, feedyard operators throughout the state are working with KDA to develop or update biosecurity plans. As of February 2019, 40 feedyards and 14 dairies have completed individual Secure Beef Supply Plans or Secure Milk Supply Plans and more are in progress. Kansas can continue to be at the forefront of development of biosecurity plans throughout the beef supply chain. It should be noted that many feedyards have existing biosecurity plans.
Education	The Kansas State University Department of Animal Sciences and Industry is recognized throughout the cattle industry as one of the premier animal sciences programs in the nation and a prime spot not only for superior education and a tremendous provider of qualified employees but also as a hub for cutting-edge research. As the Kansas beef industry looks to the future, the role of K-State as the knowledge base for the industry will be critical.

Factor	Implications for Growth and Development Opportunities
<p>Export Potential</p>	<p>In 2017, exports of beef and veal products were \$1.25 billion and exports of hides and skins were \$208 million, according to the U.S. Census Bureau. Through July 2018, the U.S. Meat Export Federation estimates that exports have added \$318.31 per head in value. Beef produced from cattle raised, fed and processed in Kansas will be critical in meeting the strong demand from domestic consumers and the growing global middle class.</p>
<p>Human Capital</p>	<p>Kansas is not only one of the top beef producing states in the United States, it is also home to world renowned leaders throughout the supply chain. There is a wealth of knowledge driving the continual improvement in the beef cattle industry, including research and extension leaders at K-State (College of Veterinary Medicine, Department of Animal Sciences and Industry, the Beef Cattle Institute) and Fort Hays State University and throughout private industry, including industry consultants, companies located within the KC Animal Health Corridor, and cattlemen and women who are serving in leadership roles in industry associations. As the industry works to improve production capabilities, it will be critical to work alongside these well-recognized industry leaders.</p>
<p>Consumer Outreach</p>	<p>Today's consumers are increasingly interested in knowing how and where their food is grown, raised and processed. Throughout the beef supply chain, private operations have opened their doors to welcome consumers and influencers from urban and suburban areas in Kansas for learning opportunities. The Kansas Beef Council (KBC) has significantly increased its social media presence, promoting the health benefits of beef and advocating for beef production practices to consumers and influencers. Since refocusing its efforts on digital, the KBC has experienced a 1,264 percent increase in its Facebook following (from 2,008 to 27,400 followers) and received over 1.8 million video views on Facebook. The KBC Instagram account was created in 2017 and has over 2,100 followers, most of whom are 18-25 years old living in Kansas City and Wichita.</p>
<p>Policy Environment</p>	<p>Kansas tax law allows sales tax exemption for farm machinery and equipment and various ag-based inputs. These state tax code provisions make Kansas a more attractive state for growth or expansion.</p> <p>The High Performance Incentive Program (HPIP) provides a sales tax exemption on the construction, reconstruction, and remodeling of facilities for projects greater than \$50,000. Sales tax exemptions are also present for farm machinery and equipment and various ag-based inputs. These state tax code provisions make Kansas a more attractive state for growth or expansion.</p> <p>Also at the state level, KDA works closely with the beef cattle community to eliminate unnecessary and outdated regulations, and on the development of commonsense solutions to policy challenges in Kansas. Through the KDA Animal Health Board and key partnerships throughout the industry, KDA regularly meets with and seeks input on policy-related issues to ensure industry concerns are heard and included in policy decisions.</p> <p>At the federal level, Kansas is fortunate to have elected members of Congress who strongly support the beef cattle industry. The Kansas congressional delegation will play an important role in influencing positive changes related to federal regulations or legislation, including a national traceability system, international trade, marketing regulations, federal taxes, antibiotic use, transportation rules, human nutrition, natural resources and more. Appointed leaders in the federal government, including at the U.S. Department of Agriculture, Office of the U.S. Trade Representative, Environmental Protection Agency and more have worked with Kansas to seek solutions to policy challenges.</p>

Factor	Implications for Growth and Development Opportunities
<p>Supporting Institutional Infrastructure</p>	<p>Kansas has a solid foundation throughout the entire beef production community. With cow-calf production and stocker operations, a robust feeding sector, and a strong beef processing presence, Kansas has a well-established beef production network that results in efficiency benefits to all steps in the supply chain.</p> <p>Kansas feedyards are able to recruit feeder cattle from all four directions, including Canadian and Mexican feeder calves, as well as yearlings from the Rocky Mountains and calves from the southeast United States. As of Jan. 1, 2018, Kansas has 2.45 million cattle on feed. Kansas ranked second in fed cattle marketed with 4.94 million in 2017. That represents more than 22 percent of all cattle fed in the United States.</p> <p>As one of the top grain producing states (including corn, sorghum, and wheat), the Kansas beef cattle industry benefits from having a readily available supply of feed. There are also abundant supplies of roughages, including silage, alfalfa and other hays. In order to sustain and grow the cattle industry, especially the cattle feeding sector, maintaining the abundant feed supply is critical.</p> <p>Kansas is also among the top states for beef processing, with three of the four major beef processors operating in Kansas.</p> <p>Kansas is recognized as one of the best exercised states in foreign animal disease. The construction of the National Bio and Agro-Defense Facility and the existing Biosecurity Research Institute enhance the research capabilities for animal health and biosecurity for the state, national and global beef cattle community. Kansas has also stepped up as a leader in the development of an enhanced disease traceability system with the launch of the CattleTrace pilot project in 2018.</p> <p>Kansas also has a large presence of agribusinesses that directly support beef cattle production, including equipment manufacturers and equipment service providers, livestock feed manufacturers, livestock trailer manufacturers and semen/genetic companies.</p>
<p>Traceability</p>	<p>In response to calls to action from cattle producers in Kansas, a public-private partnership that includes the Kansas Livestock Association, KDA, K-State and private industry formed in early 2018 to explore opportunities to move the industry forward on the topic of traceability. In summer 2018, CattleTrace was launched as a pilot project with a goal of developing and testing a purpose-built infrastructure for disease traceability purposes. The launch of CattleTrace has established Kansas as a leader on the topic of traceability and provides an opportunity for the Kansas beef industry to be a driver in the development of a disease traceability infrastructure that could be expanded to a national-level system.</p>

Factor	Implications for Growth and Development Opportunities
Verification/ Certification Programs and Quality Assurance	<p>Beef producers have shown a strong willingness to participate in voluntary certification or verification programs, including the Beef Quality Assurance program and multiple third-party programs. In addition to providing education and training on animal handling, management and production practices, some of these programs can result in earning a premium at the marketplace while also potentially increasing transparency in the supply chain, allowing for information to be provided to consumers about how the animal was raised and processed. In Kansas, more than 90 percent of the fed cattle in the state are handled by BQA certified handlers.</p> <p>As Kansas beef producers continue to increase herd size, there may be opportunities to add value to cattle raised in Kansas through increased participation in third-party audited certification/verification programs to meet specific consumer demands for increased transparency as well as packer and retailer demand for specific traits and qualities.</p>
Weather and Natural Resources	<p>The semi-arid climate in Kansas is suitable for cattle production year-round.</p> <p>Not all land in Kansas is suitable for growing crops, but cattle are able to graze on grasses and plants growing on the 16.3 million acres of pastureland throughout the state and convert these resources, which would otherwise likely be unused, into high quality protein for human consumption.</p> <p>Raising cattle not only allows Kansas farmers and ranchers to maximize production on land not conducive for farming, it is a higher value product compared to farming.</p> <p>Kansas is also taking significant proactive steps to preserve and extend the usable life of water supplies in Kansas. In recent years, voluntary, flexible and producer-driven water conservation tools have been implemented to help farmers and ranchers manage their water rights while continuing to raise crops or livestock. Additionally, Kansas has developed a <i>Vision for the Future of Water Supply in Kansas</i> with goals and specific action items to help ensure a reliable water supply while continuing to grow the economy.</p>

CHALLENGES

Just as the beef cattle industry has endured challenges from weather, economic fluctuations and consumer perception in recent years, the threat of additional barriers to growth will continue to exist. Identifying those challenges and developing proactive solutions will be key to future growth.

Challenge	Details of Challenge
Access to Capital	<p>Growth and expansion in the beef industry can often require large amounts of financial capital. Finding enough financial institutions with the ability to competitively lend at the levels necessary for some beef operations to grow in Kansas is a challenge and barrier to growth.</p>

Challenge	Details of Challenge
<p>Critical Infrastructure</p>	<p>As beef packers and processors identify when and where to grow their presence, one factor they will consider is utility rates. There are challenges with competitive utility rates in Kansas that have resulted in burdensome and unnecessarily high utility rates.</p> <p>With technology continuing to advance, there is growing reliance on live feeds and video auction services to conduct business transactions in the beef cattle industry, especially in the seedstock sector. The lack of consistent, reliable broadband access limits the ability of some Kansas producers to reach additional customers and expand their business through the use of Internet video auction services and other online business services.</p> <p>Unlike other sectors of agriculture, the beef industry relies solely on trucks and the highway system to transport live animals and beef products. With the utmost focus on safely and efficiently transporting products, it can be a challenge for larger trucks and vehicles on smaller two-lane highways, especially in western Kansas. Federal transportation regulations related to hours of service and electronic logging devices also challenge the ability to safely and efficiently transport livestock.</p> <p>While Kansas is home to several major beef packing facilities, there has also been a decrease in the number of local processing facilities, mostly in rural communities. Without a nearby processing plant, cattlemen are forced to drive longer distances in order to process smaller groups of animals.</p>
<p>Generation Transfer</p>	<p>As the current generation of primary owners and operators approach retirement age, identifying the next generation of management can be a challenge when a son or daughter, or other family member, is not interested or able to take over an operation that may have been built for multiple generations. Beyond identifying the actual next generation of management, challenges related to capital requirements in agriculture can also be a barrier when it comes time to transition a beef cattle operation from one generation of ownership to the next.</p>
<p>Industry Capacity and Competition</p>	<p>Historically and even still today, Kansas, Nebraska and Texas have been the top three beef producing states nationwide. Industry growth and expansion in other states may present a challenge for growth in Kansas.</p> <p>After multiple years of expansion, increases in the beef herd are moderating. From Jan. 1, 2017, through Jan. 1, 2018, the total number of cattle and calves on ranches decreased by 2 percent, but the number of heifers retained was up 4 percent.</p>
<p>Industry Fragmentation</p>	<p>Unlike the vertically integrated pork and poultry industries, the U.S. beef industry remains composed of multiple independent segments working together to comprise the beef supply chain. This independent organization of the industry can be a challenge when producers within the sectors fail to recognize the importance of working cooperatively with each segment up and down the supply chain.</p>

Challenge	Details of Challenge
Industry Opponents	The growing number and power of anti-animal agriculture and anti-meat activists will continue to challenge consumer perception of beef production practices, beef nutrition and beef safety. While the beef industry has and will continue to compete with other proteins, the emergence of synthetic meat, and issues related to labeling of the product in a manner that is clear and not misleading to the consumer, is a challenge the beef industry must address.
International Trade	A key area for growth will result from increasing global demand for beef. Kansas has the opportunity to increase exports not only of beef but also of live cattle to countries wanting to expand their own domestic herd. Since implementation, NAFTA has given duty-free access for U.S. beef into Canada and Mexico, markets that equal roughly \$2 billion in U.S. beef exports. The United States-Mexico-Canada Agreement, signed on Nov. 30, 2018, maintains market access for beef; the USMCA will have to be ratified by Congress. In addition, an intent to engage with Japan in bilateral negotiations is encouraging as Japan is the top market for U.S. beef exports despite a 38.5 percent tariff. With the opening of the China market in 2017, there is tremendous potential for Kansas beef, but regulatory hurdles, including traceability, limit the ability to export U.S. beef to China's 1.3 billion people. Additional opportunities exist in the European Union, throughout Asia and more.
Market Volatility	Market volatility continues to be a challenge for all segments of the beef industry.
Policy	<p>Kansas is one of fewer than ten states in the nation that has laws restricting corporations from engaging in farming and ranching. The Kansas law has been amended throughout the past to provide 18 specific exemptions, but the law still restricts who can do business in Kansas. This unfair restriction has resulted in potential agricultural operations choosing to relocate, grow or expand in states other than Kansas. A suit has been filed challenging the law, and the case is pending.</p> <p>The beef industry relies solely on trucks and the highway system to transport live animals and beef products. Federal regulations can make it challenging to transport live animals or beef products in a manner that is safe for drivers and animals alike. Regulations related to the use of Electronic Logging Devices and hours of service have resulted in challenges for the cattle industry. A one-year ELD exemption for livestock haulers is pending in Congress as of October 2018. The Federal Motor Carriers Safety Administration opened a public comment period related to potential revisions to hours-of-service regulations. The comment period closed in September 2018.</p> <p>Burning the Flint Hills is a critical range management tool to improve prairie grass production and prevent intrusion from weeds and woody plants that not only prevent growth of grasses but also can be dangerous fuel in a wildfire emergency, as evidenced by wildfires in both 2016 and 2017 in southern Kansas. Kansas has worked with industry stakeholders, local government and environmental partners to develop and implement the Flint Hills Smoke Management Plan to address concerns raised by downwind communities regarding air quality during the annual burning season. Despite this plan, there is concern that the federal government may propose regulations that may result in challenges to the ability of Flint Hills ranchers to burn rangeland.</p>

Challenge	Details of Challenge
<p>Policy cont.</p>	<p>Though not unique to Kansas, there exist significant challenges due to federal laws and regulations, including: transportation, international market access, the Endangered Species Act, environmental rules and regulations related to air and water quality, and more. The 2018 Farm Bill includes provisions related to disaster assistance, foreign animal disease preparedness and response, workforce training, conservation and more that directly affect the beef cattle industry.</p> <p>Kansas is fortunate to have a federal congressional delegation that is highly supportive of agriculture and the beef industry. Beyond Kansas’ two senators and four representatives, however, there are an increasing number of federal lawmakers who have no understanding of agriculture, and this is becoming a challenge at the state level as well.</p>
<p>Talent Development and Quality of Life</p>	<p>Growth in the beef cattle industry, particularly in cattle feeding and cattle processing, will require a skilled workforce, which continues to be a significant challenge through the entire agriculture industry. In addition, a decline in the number of graduates from the K-State College of Veterinary Medicine with a desire to work in a food animal practice in rural Kansas presents a challenge.</p> <p>Beyond needs for specific job training and talent development, ensuring a long-term ability to recruit and sustain a high-quality workforce will require the state to consider issues surrounding quality of life in rural communities, including topics related to having a robust economy of support businesses necessary for the agricultural industry, strong schools, access to health care services, affordable and quality housing, and more. Increasing local property tax rates also present challenges throughout the beef industry and rural communities.</p> <p>At the federal level, challenges as a result of the nation’s immigration system can be difficult for the beef industry, which relies on a year-round, steady supply of migrant employees, especially in the cattle feeding and beef processing sectors.</p>
<p>Traceability</p>	<p>The lack of an end-to-end national traceability system inhibits export growth potential and could potentially create animal health threats.</p>
<p>Water and Natural Resources</p>	<p>Access to an abundant and reliable water supply is critical to growing any livestock operation. This can prove challenging in many areas of western Kansas that are closed to new water appropriations. New or expanding beef operations in these regions will have to purchase land with sufficient water rights.</p> <p>Delays in the amount of time it can take for approval of certain Kansas Department of Health and Environment permits can prevent beef industry operations from expanding in a timely manner.</p>

SUCCESSSES

Key successes in the beef industry:

- A collaborative partnership that includes the KLA, KDA, and individual producers came together to conduct a pilot project aimed at developing and testing a purpose-built infrastructure capable of tracing cattle movement through the supply chain for disease traceability purposes. CattleTrace will collect movement data on at least 55,000 cattle and will help inform and guide the development of enhanced disease traceability systems for the entire U.S.
- In 2017, exports of beef and beef products from Kansas totaled \$1.25 billion, the largest export value in the past five years, and beef and beef product exports from Kansas have accounted for between 18 and 26 percent of total U.S. beef exports for each of the last five years.
- The Kansas Beef Council (KBC) has significantly increased its social media presence, promoting the health benefits of beef and advocating for beef production practices to consumers and influencers. Since refocusing its efforts on digital, KBC has experienced a 1,264 percent increase in its Facebook following (from 2,008 to 27,400 followers) and received over 1.8 million video views on Facebook. KBC has created a YouTube channel that has received over 73,000 video views. The KBC Instagram account was created in 2017 and has over 2,100 followers, most of whom are 18-25 year olds in Kansas City and Wichita. The organization has also rebranded its website, which now receives over 1,000 pageviews per day. Lastly, KBC has focused on digital influencer marketing programs in the Kansas City Metro Area.
- Across Kansas, stakeholders are working to expand cellular coverage and broadband access. In early June 2018, the Kansas Farm Bureau was granted a waiver from the Federal Communications Commission to challenge the legitimacy of cellular coverage maps from various major carriers in Kansas. Challenging the map may provide opportunities to secure funding to expand cellular coverage in Kansas. Also, Governor Jeff Colyer secured a grant to complete a statewide broadband mapping project. Together, these efforts will help identify locations in Kansas that lack connectivity and coverage and will help allow for future cellular and broadband development.
- After multiple years of drought and wildfires, industry partners, KDA and other state leaders, federal partners, and community stakeholders took a proactive and collaborative approach to providing drought relief and stopping wildfires. These actions resulted in more than 50 fires in 2018 being extinguished without any major, catastrophic disasters as in previous years. They also secured early access to CRP acres for haying and grazing, and other expedited relief and additional flexibility.
- To prepare the next generation of beef leaders, a continuum of opportunities exist in Kansas. The KJLS LEAD Challenge, the K-State Animal Sciences Leadership Academy and the KLA Young Stockman's Academy provide opportunities for youth — from as young as 7 years old to young professionals — to learn about and prepare for careers in the beef cattle industry.

Beef

GROWTH OBJECTIVE:

Execute a long-term strategy for growth in the beef cattle industry that not only builds upon its strengths but that also encourages innovation, collaboration and trust throughout the production chain and with consumers.



OUTCOMES & ACTION ITEMS

Leaders from throughout the Kansas beef industry will continue to collaborate in the development and implementation of a long-term strategic growth strategy with input and discussion among key partners. Industry-identified desired growth outcomes, initially developed in 2016 and expanded to include action items, will be implemented by industry and key partners and updated annually at the Kansas Governor's Summit on Agricultural Growth. Following are the proposed action items to continue building on the achievement of the beef sector desired outcomes.

High Priority Outcomes

Market- and industry-driven traceability system to provide critical tools to manage a disease outbreak, enhance consumer confidence and trust in Kansas livestock, protect food safety, and provide opportunities to access export markets.

ACTION ITEMS:

- Continue to implement the CattleTrace pilot project in accordance with the established primary objectives, including:
 - Develop a purpose-built infrastructure for an animal disease traceability system.
 - Evaluate the efficiency and capabilities of the animal disease traceability system and infrastructure.
 - Determine the value of an animal disease traceability system throughout the supply chain.
- Utilize traditional media, social media, www.CattleTrace.org, and a monthly e-newsletter to provide regular updates and information about the pilot project to partners and interested stakeholders.
- Based on results of the initial pilot project, determine next steps in the advancement of disease traceability in the beef cattle industry.

Federal immigration reform with a focus on long-term visas for agricultural workers, and a potential immigration pilot program in Kansas.

ACTION ITEMS:

- Establish a coalition to support legislation to create an H2C guest worker program, or something similar, that allows for a year-round, multi-year, renewable visa. Consider a state pilot program.
- Compile resources to aid employers to work within the current federal immigration system.
- Compile educational resources about the importance of migrant labor to the Kansas economy.

Continued industry-led proactive social and traditional media outreach about the beef production chain and beef safety, quality and nutrition to encourage trust from consumers, influencers and media and a better understanding of the industry.

ACTION ITEMS:

- Coordinate with established beef industry organizations to continue social and traditional media outreach about beef production and beef safety, quality and nutrition.
- Identify influencers, including but not limited to retail outlets and food service providers, at the state level to expand reach of social and traditional media with general consumer audiences.
- Coordinate with agricultural industry organizations to provide more frequent training for farmers and ranchers about how to engage with consumers.

Simplified permitting requirements for farm vehicles, and transportation regulations that provide flexibility to requirements for commercial driver's licenses (CDLs) to ensure that live cattle and beef products are able to move safely and efficiently throughout the production system.

ACTION ITEMS:

- Coordinate with industry to influence federal policymakers on topics related to CDL exemptions, electronic logging devices and hours of service regulations.

Kansas established as a top choice for high-quality beef and cattle genetics for export opportunities.

ACTION ITEMS:

- Support bilateral and multilateral trade pacts that expand export potential for beef and beef products.
- Host inbound trade missions bringing potential new international customers to Kansas to showcase the whole Kansas beef industry, including ranches, stocker and background operations, feedyards, packers and processors, and retail and food service.
- Coordinate with industry organizations to recruit more beef producers willing to either host inbound trade missions or travel on outbound missions.
- Develop branded marketing materials to tell the Kansas beef story to potential new markets and in existing markets.
- Evaluate potential barriers (policy issues, exchange rates, trade agreement challenges, etc.) to increasing export potential for genetics.
- Develop informational materials regarding specific market trends in potential new markets — what cuts are preferred, what is their interest in beef products — in order to better meet the demands of new customers.

Rural broadband access throughout Kansas.

ACTION ITEMS:

- Support continuation of USDA Rural Development Telecom and Rural Utility Service grant, loan and loan guarantee programs.
- Support the Statewide Broadband Expansion Planning Taskforce, established in the 2018 legislative session, that will identify opportunities and potential funding sources to expand broadband infrastructure and increase access, remove barriers that may hinder deployment of broadband, and consider options for deployment of new advanced communication technologies.
- Support Kansas Farm Bureau's effort to challenge the FCC cellular coverage maps from various major carriers in Kansas. Challenging the map may provide opportunities to secure funding to expand cellular coverage in Kansas.
- Support a collaborative project led by Connected Nation and supported by Governor Jeff Colyer that will prepare a statewide broadband map of wireline and wireless coverage.

A competitive and competent workforce to meet the diverse and technical needs of the beef industry in Kansas. Talent development and educational training opportunities for students preparing for careers in the beef industry.

ACTION ITEMS:

- Support innovative educational opportunities that will provide hands-on experiences in beef cattle medicine and production.
- Work with Kansas beef producers at each step of the production chain to identify and list specific skills and skill sets needed.
- Identify Kansas Board of Regents institutions, community colleges, technical schools, industry and others who have the capacity and resources to provide training in specified subject areas to meet the needs of industry employers.
- Develop career and education programming at the 4-H level.
- Develop education and outreach campaign related to careers in the beef industry as a means to showcase the broad range of career opportunities and dispel myths about working in the industry.
- Encourage additional opportunities for English language training to break down linguistic barriers in the beef industry to foster personal and professional development for employees and improved business communication throughout the industry.
- Develop partnerships to place military veterans in positions of employment on beef operations.
- Explore opportunities to develop educational programs related to beef nutrition for pre-health, pre-medicine, nutrition and other human health related fields of study at Regents schools.

Cooperation and strong public-private partnerships in the recruitment, expansion and development of livestock production and meat and dairy processing, as well as affiliated industry partners throughout Kansas to further solidify Kansas' role and reputation as a recognized leader in the beef industry.

ACTION ITEMS:

- Attend annual beef industry conventions and meetings and participate in trade show events to gain exposure for Kansas within beef industry enterprises.
- Work on all levels — state, regional and local — to be pro-business and open to agriculture development.
- Develop branded marketing materials to tell the Kansas beef story to potential new partners.
- Encourage and support research and innovation at the retail level in an effort to capitalize on consumer interest in beef products.
- Support expanded value-added beef processing in Kansas and concentrate recruitment in that sector of the industry.
- Encourage housing development programs to address housing shortages in areas with concentrated beef processing and feeding sectors.
- Explore the development of a branded Kansas beef program through the From the Land of Kansas program to provide value-added, niche marketing opportunities for Kansas beef products and information to navigate the local food marketing infrastructure in Kansas.
- Encourage and support opportunities to increase collaboration and information sharing among the different sectors in the beef production community in a manner that creates opportunity to foster trust, speak with one voice and add value throughout the supply chain.
- Discuss expansion of the Sunflower Supreme Replacement Heifer program statewide.
- Encourage more producer education opportunities related to risk management methods and cattle marketing.

Medium Priority Outcomes

Farm transition planning resources for farmers and ranchers to utilize during preparations for intergenerational transfer or alternative forms of succession planning.

ACTION ITEMS:

- Identify existing organizations and resources with farm transition information and assistance.
- Encourage the inclusion of farm transition presentations and materials at beef industry events.
- Make farm transition materials and resources available at KDA website.
- Distribute public information, including a press release, about the importance of farm transition planning.
- Identify farm transition success stories to use in outreach and education materials.
- Work with banking/financial sector professionals to develop and disseminate farm transition resources to farmers and ranchers.

State tax policies, economic incentives and business regulations focused on the reduction of burdens on agricultural entities.

ACTION ITEMS:

- Market the benefits of Kansas' business-friendly environment.
- Educate lawmakers how the current environment is good for business.
- Engage in legislation that affects Kansas' pro-growth business environment.
- Support efforts to repeal or otherwise eliminate current corporate farming laws in Kansas that limit certain ownership structures from operating in the state, which curtails investment and limits growth and modernization.
- Draft legislation to address the challenges related to existing economic development incentives and create new incentives that work for agriculture, based on feedback from industry.

Science-based environmental management and range management tools, especially for prescribed burning in the Flint Hills, which are accessible to producers.

ACTION ITEMS:

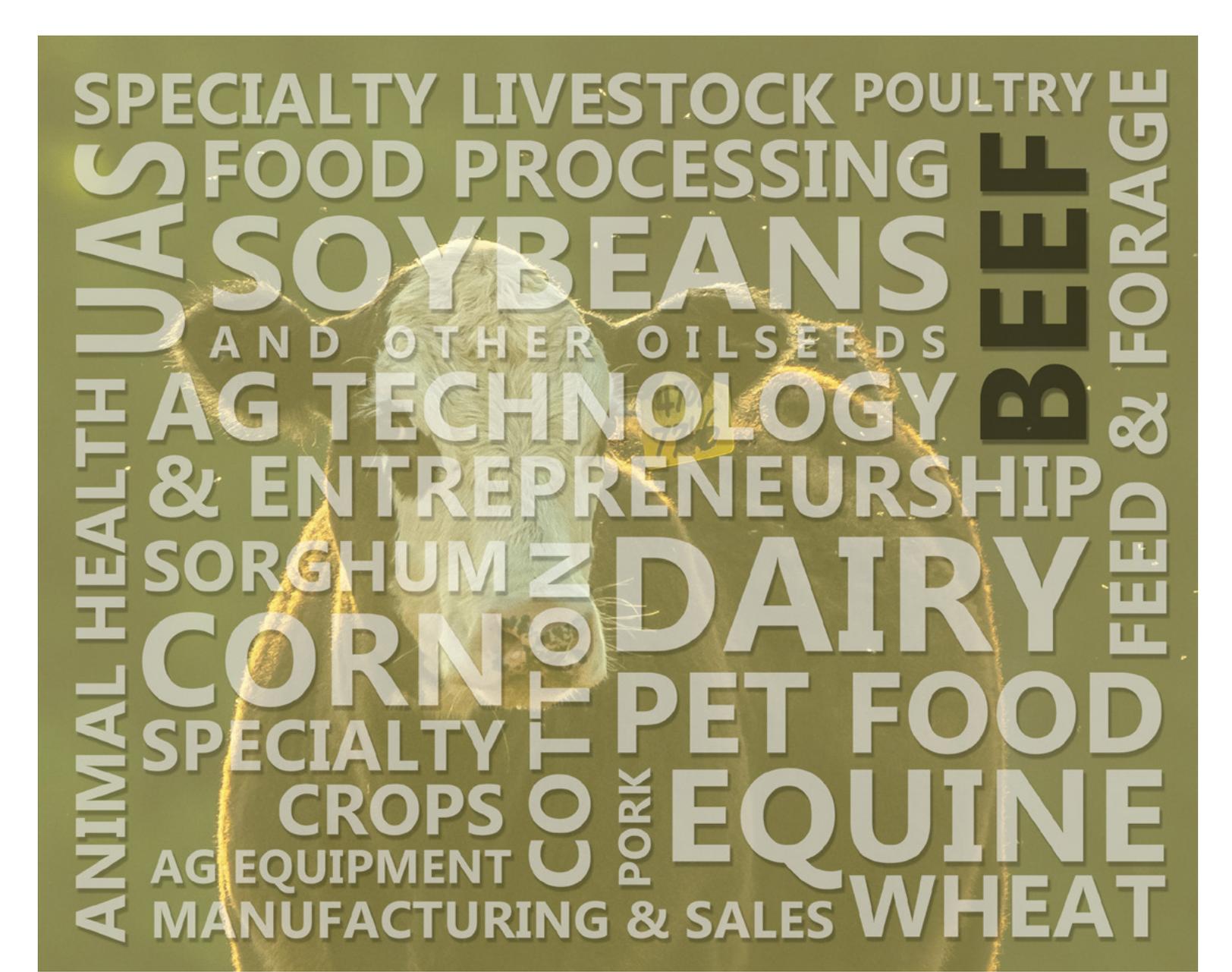
- Continue coordination with KDHE and industry on development and distribution of educational and outreach materials about the importance of prescribed burning that can be distributed to regional and statewide ag media.
- Coordinate with the Kansas congressional delegation to advocate for and protect the use of science-based range management tools, including prescribed burning.
- Work with the state of Nebraska to protect the ability to conduct prescribed burns in Kansas.
- Encourage K-State Research and Extension to assist landowners to prepare land management plans.
- Encourage university research related to alternative burning strategies, integrated approaches to invasive control, and multi-species grazing.

Competitive utility rates in Kansas that do not create a competitive disadvantage with other states and that allow Kansas to maintain existing enterprises and grow industry in the future.

ACTION ITEMS:

- Work with electric utilities to understand the most economical places to locate major processing facilities and what drives those economics.
- Include industrial electrical rate options and favorable locations in pre-selected site data.
- Evaluate options for adjusting the regulated nature of Kansas electricity such that rates can be more competitive.
- Encourage 0% loan program for infrastructure expansion.

Policies in this document are a reflection of industry discussion and not a representation of state government.

A close-up photograph of a cow's face, looking directly at the camera, set against a blurred background of a field. The image is overlaid with a dense collection of agricultural and industry-related terms in various sizes and orientations of white, bold, sans-serif font. The text includes: 'SPECIALTY LIVESTOCK POULTRY', 'FOOD PROCESSING', 'SOYBEANS', 'AND OTHER OILSEEDS', 'AG TECHNOLOGY', '& ENTREPRENEURSHIP', 'SORGHUM', 'DAIRY', 'CORN', 'PET FOOD', 'SPECIALTY CROPS', 'EQUINE', 'AG EQUIPMENT', 'PORK', 'WHEAT', 'MANUFACTURING & SALES', 'FEED & FORAGE', and 'BEEF'. The word 'BEEF' is notably larger and bolder than the other text. The overall composition is a word cloud centered on the cow's face.

SPECIALTY LIVESTOCK POULTRY
FOOD PROCESSING
SOYBEANS
AND OTHER OILSEEDS
AG TECHNOLOGY
& ENTREPRENEURSHIP
SORGHUM
DAIRY
CORN
PET FOOD
SPECIALTY CROPS
EQUINE
AG EQUIPMENT
PORK
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