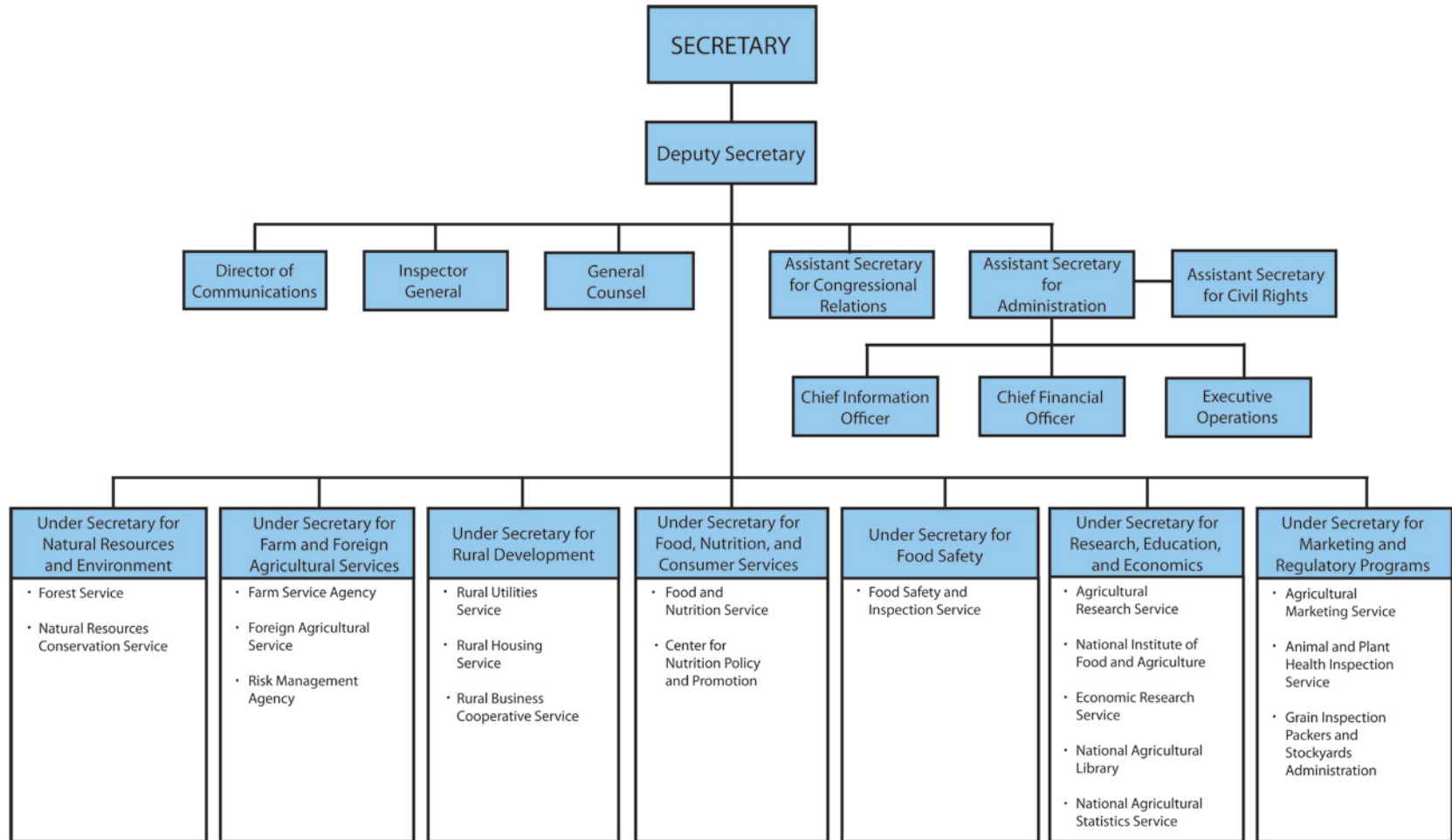




Agricultural Marketing Service and the Livestock, Poultry & Seed Program

Dr. Craig A. Morris
Deputy Administrator

USDA Organizational Structure



About AMS

- i Part of USDA Marketing & Regulatory Programs (also APHIS and GIPSA)
- i **Mission:** To facilitate the competitive and efficient marketing of agricultural products.
- i **Vision:** We envision a marketing system that quickly and efficiently moves wholesome, affordable agricultural products from the farm to the consumer.

Agricultural Marketing Service Organizational Chart

U.S. DEPARTMENT OF AGRICULTURE
AGRICULTURAL MARKETING SERVICE

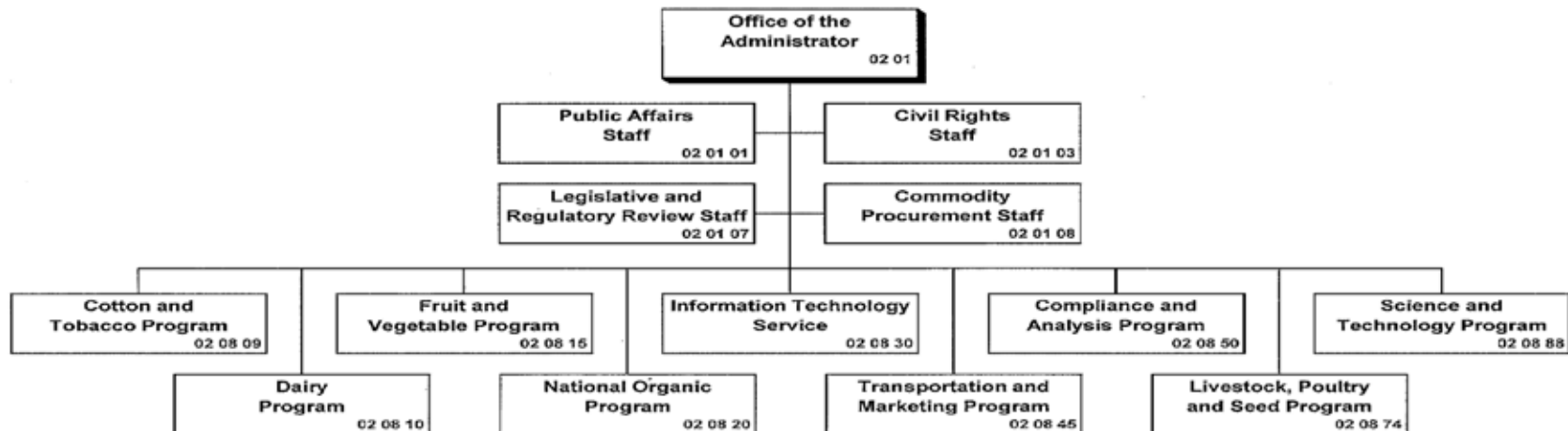
Supersedes AMS chart dated October 5, 2009

APPROVED: _____

[Signature]
Under Secretary for
Marketing and Regulatory Programs

DATE: _____

9-13-12



The mission of the Agricultural Marketing Service is to facilitate the competitive and efficient marketing of agricultural products.

AMS Programs

- | Livestock, Poultry & Seed
- | Dairy
- | Fruit & Vegetable
- | Cotton & Tobacco
- | National Organic Program
- | Transportation & Marketing
- | Compliance and Analysis
- | Science and Technology

AMS Service Examples

i Pesticide Data Program

- § Collects statistically-based data on pesticide residues in food and drinking water by cooperating with States
- § Assures international customers of the safety of sampled commodities
- § AMS Pesticide Recordkeeping Program: Ensures that records of Federally restricted use pesticides are maintained by certified applicators and available for official use

i Grading and Verification

- § Facilitate marketing of commodities
- § Provide impartial evaluation of product quality
- § Voluntary fee-supportive services

i Quality Verification Services

- § Voluntary third-party services for a fee
- § Support/protect buyers and sellers in commercial transactions
- § Basis for product and/or production marketing claims are commodity standards
- § USDA seal is especially important in international markets

AMS Service Examples

i Market News

- § Helps to equalize agricultural marketing opportunities across industry
- § About 1,500 daily, monthly, and annual Federal/State and international reports
- § Time-sensitive information
- § Internet access—50 million hits/year!
- § Covers all major agricultural products

i Standardization

- § Describe product quality attributes
- § Provide a common language of trade for buyers and sellers
- § Utilized in user fee grading and market news reporting
- § Over 475 U.S. and international standards in effect

Examples of AMS Services

Transportation Services

- § Analyzes agricultural products distribution in domestic and international markets
- § Assists shippers entering the export market
- § Represents U.S. agricultural interests on transportation issues before industry and governmental regulatory bodies

Wholesale and Farmers Markets

- § Assists in feasibility analysis and design of public wholesale marketing facilities
- § Provides technical assistance to improve farmer direct marketing
- § Operates USDA farmers market
- § Farmers Market Promotion Program

National Organic Program

- § Develops national standards with the National Organic Standards Board
- § Enhances marketing opportunities for organically produced foods
- § Accredits State and private certification agents



Examples of AMS Services

- | Commodity Procurement
 - § Removes surplus commodities from markets for distribution through National School Lunch Program and other Federal food and nutrition programs
 - § Emergency and disaster relief purchases

- | Marketing Orders and Agreements
 - § Stabilize market conditions (quality and quantity) and improve producer income
 - § Dairy and Fruit/Vegetable

- | Research and Promotion
 - § Federally legislated and industry-funded
 - § Administered by industry representatives but overseen by USDA
 - § Currently 22 R&P Programs within AMS

Livestock, Poultry and Seed Program Overview



Livestock, Poultry and Seed Program

- i One of the commodity programs in AMS
 - § Approximately 1,000 Federal staff members and an additional 1,000 State employees who work for the Program under cooperative agreements with all 50 States
- i Wide array of markets covered:
 - § Cattle/Beef, Hogs/Pork, Sheep/Lamb/Goats, Poultry, Shell Eggs, Aquaculture/Wild Caught Seafood, Grains/Oilseeds/Hay, Bioenergy, Organic, International

Services segment value differences throughout the supply chain



Auditing quality management systems for unique marketing claims



Reporting on the markets



Adding value through grading and certification



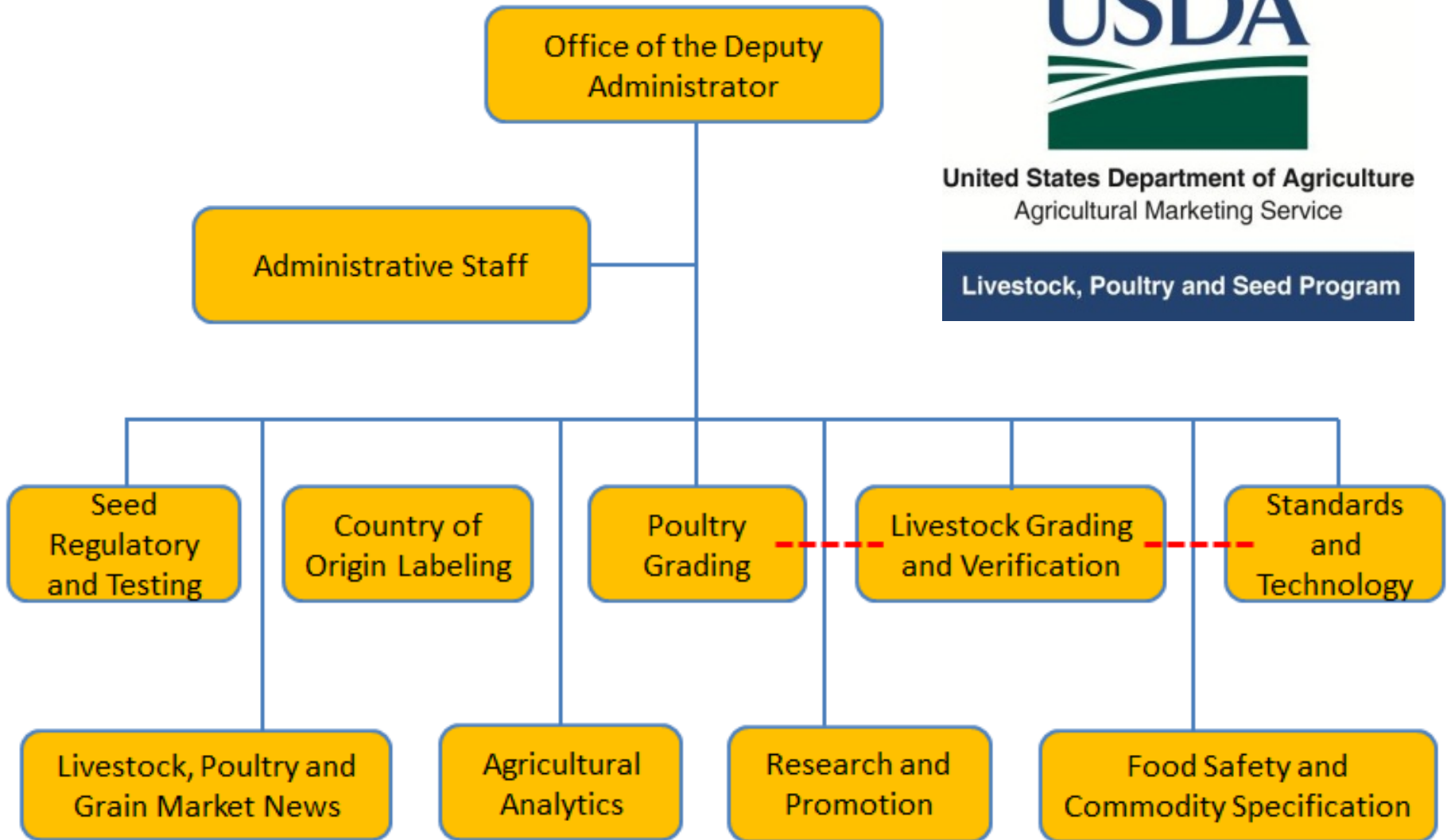
Helping convey quality attributes to the consumer





United States Department of Agriculture
Agricultural Marketing Service

Livestock, Poultry and Seed Program



LPS Divisions

- | Seed Regulation and Testing
- | Quality Assessment
 - § Grading and Verification
 - § Standardization
- | Food Safety and Commodity Specification
- | Market News
- | Marketing Programs (R&P)
- | Country of Origin Labeling
- | Agricultural Analytics

Seed Regulatory and Testing Division

Enhancing movement of U.S. seed in inter and intrastate commerce



Services & Benefits

- | Federal Seed Act enforcement to protect seed buyers
 - § Prohibits false labeling and advertising of seed in interstate commerce
- | Trueness to variety validation
- | Voluntary seed testing services
- | Accreditation programs
- | OECD Seed Scheme operations

Quality Assessment Division

ASSURING QUALITY OF
PRODUCTS AND
PRODUCTION PROCESSES



APPLYING STAMP AND
CERTIFICATION OF
APPROVAL



QAD Functions & Benefits

- | Instrument Grading
- | Official U.S. grade standards:
 - § Prime, Choice, Select
- | Marketing Claim Standards:
 - § Grass Fed, Naturally Raised, Meat Tenderness
- | Institutional Meat Purchase Specifications (IMPS)
- | International Standards (UNECE)
- | Federal Purchase Program Specifications

QAD Grading Services

- Provided for poultry, shell eggs, beef, lamb, pork, veal, and calf
- Voluntary; requested by industry
- Application of quality grades based on written standards
- Certification based on detailed specification requirements



Benefits

- Value guideline
- Marketing tool
- Consumer guide to palatability
- Ensured compliance with specifications and contracts for benefit of purchaser



Instrument Grading



Photo courtesy of Meatingplace.com

Beef Instrument Grading

- i Approved for use in 18 plants
 - § 68,000 daily carcass capacity
 - § 78% of carcasses graded
- i Officially used in 10 plants
 - § 36,000 daily carcass capacity
 - § 42% of carcasses graded
- i Number of plant that use instruments continues to expand

QAD Verification Services

- | Independent audits
- | Standards are internationally recognized
- | Ensure product quality and program conformance



QAD Verification Examples

- i Applying marketing claims
 - § Naturally Raised, Never Ever 3, Grass (forage) Fed
 - § Breed certification
- i Quality Systems Assessment Programs
- i National Organic Program
- i Export Verification Programs

Certification Programs



Beef Tenderness Marketing Program



ASTM Beef Tenderness Marketing Claim Standard

- Worked with academia and industry to develop an accurate system based on an objective scale, system ensures that specific beef cuts consistently meet these established thresholds.
- ASTM F2925-11 was reapproved 9/2011.
- In 2012 AMS began working with segments of the industry to have the Tenderness Marketing Claim applied to the retail level.

Tenderness Activities

- i Minimum Tenderness Threshold Values derived from shear force testing of Longissimus Dorsi muscle.
- i Tender value – 4.4WBSF or 20.0 Kg SSF
- i Very Tender value – Exceeds MTTV value by at least 0.5 kg for WBSF or 4.6 kg for SSF


Tenderness Activities

- i Muscles associated with Tender or Very tender are:
 - tensor facia late
 - vastis medialis
 - infraspinatus
 - teres major
 - rectus femoris
 - psoas major
 - spinalis dorsi
 - serratus ventralis
- i Qualify based on scale of testing.

Tenderness Activities

- AMS has begun working with four companies who have requested approval to use the USDA Certified Tender claim.
- Three companies have been approved and are selling product under the new label.
- Approved beef processors can now market products as USDA-Certified Tender or Very Tender through product labeling, advertisements, and promotions.

Small and Very Small (SVS) Producers




United States Department of Agriculture

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- [Let's Move \(108\)](#)

Expanding Opportunities for Small-Scale Beef Producers

Posted by [Craig Morris](#), Deputy Administrator of the AMS Livestock, Poultry and Seed Program, on April 29, 2014 at 11:00 AM



Using the USDA Certified Grass-Fed claim as its initial focus, a new USDA program will reduce costs for small producers wanting to market their cattle as USDA certified grass-fed.

SVS Marketing Claim Certification Process

- § Requires a farm/ranch plan
- § Plan is reviewed by AMS
- § Fee for program review is \$108
- § Approval granted for 2 years
- § Producers who are certified will receive a certificate that will allow them to market cattle and sheep as USDA Certified Grass-Fed
- § Note: For labeling of meat products as USDA Certified Grass-Fed, a QSA program is required at processor level

Small and Very Small (SVS) Producers

- i Grass Fed Program for SVS Producers
 - i Cattle
 - § 22 Approved Producers
 - § 4 Applications in the process
 - i Sheep
 - § 1 approved producer
 - § 1 application in process

Mexico Beef Grading

- i Working with California cattlemen and Mexican government and industry officials on issues surrounding the loss of packing capacity in Southern California.
- i Technical visit occurred in September and discussions ongoing.
 - § Assisting Mexico develop a beef grading program.
 - § Helping California producers find processors to USDA grade the cuts after return from Mexico.

Notice Requesting Comments Beef Carcass Standard

- | Notice published in Federal Register August 2014. Notice also distributed to industry stakeholders by email and publicized by press release.
- | Seeks comments on, but not limited to, carcass yield grade standard and methodology for maturity assessment.
- | Requests comments on American Meat Science Association's review of instrument grading.
- | Comment period ends November 13, 2014.

Lamb Instrument Grading Pilot

- Graded 34,555 carcasses, assessed them for presentation alignment, and analyzed for grade factors.
- Instrument validation variation less than 1.7% (between instrument and standard/card).
- May 2014, expert graded 2,100 carcasses and instrument captured over 5,900 images to align instrument quality grade with conformation and quality grade score of grading expert.
- August 2014, the instrument prediction equation was revised and approved.
- Implementation (in-plant use) is targeted for December 2014-January 2015.

U.S./Canadian Regulatory Cooperation Council (RCC)

- i AMS co-chairs RCC's initiative to harmonize U.S. and Canadian meat and poultry cut nomenclature.
- i Allows U.S. producers to ship their products with U.S. cut names without having to uniquely label or re-box the product in accordance with the prescriptive Canadian pork or beef terms.
- i Common trade language benefits both sides of the border and enhances trade opportunities for American producers.

U.S./Canadian Regulatory Cooperation Council (RCC)

- i AMS working closely with industry representatives, CFIA and NAMA
 - § Updating IMPS
 - § Harmonizing U.S. and Canadian documents
 - § Updating the meat and poultry products in the Meat Buyers Guide

U.S./Canadian Regulatory Cooperation Council (RCC)

- i February 24: CFIA pilot project began
 - § Full list of applicable meat cut names listed in the IMPS.
 - § Consumers not impacted—only applies to wholesale meat cuts.
- RCC focus is on relationship with Canada, but also building a strategy to work with Mexico to adopt IMPS or recognize them as the usable standard.

Institutional Meat Purchase Specifications (IMPS)

- | July 7: All revisions to IMPS finalized to meet translation and publication deadlines
 - CFIA translation from English to French, September 2014
 - AMS and CFIA will coordinate publishing of revised IMPS
 - NAMA's printed version of MBG, December 2014
 - AMS collaborating with NAMA and language translation group to translate IMPS from English into Spanish, November-December 2014

Uniform Retail Meat Identity Standards (URMIS)

- i Updates drafted resulting from discussions with AMS, FSIS labeling staff, and Industry Wide Cooperative Meat identification Standards Committee (ICMISC).
- i URMIS revisions intended to establish more consumer-friendly nomenclature for the retail cuts.

URMIS

- i July 2014: AMS, Beef and Pork checkoffs, Meatrack, Midan Marketing, and FSIS labeling:
 - § Reviewed the URMIS standard document and request for input.
 - § Reviewed the updated processed beef and pork descriptions and request for input.
 - § Asked for final comments on the lamb and veal URMIS common name list.
 - § Discussed review process for the new cut names.
 - § Discussed and requested guidance on the label approval process.

UNECE Standards: Beef and Pork

- Developed draft standards for beef and pork retail cuts and gained concurrence and subsequent adoption by the Working Party on the standards.
- Beef and retail pork cuts are posted on UNECE's website at http://www.unece.org/trade/agr/standard/meat/meat_e.html.

ISO Standards: Animal Welfare

- AMS Chairs the U.S. representation at the ISO animal welfare working group.
- Working to develop international welfare standards for food producing animals based on the World Organization for Animal Health (OIE) Chapters.
- Standards to be in place by the end of 2015.
- More information available here:
http://www.iso.org/iso/iso_technical_committee?commid=47858.

Food Safety and Commodity Specification

Providing nutritious and safe food



AMS Purchase Program Services and Benefits

- Economically assess livestock and seafood industries
- Support agricultural markets
- Maintain stable commodity prices
- Provide food to elderly, needy, and charitable organizations
- Safeguard health of students through National School Lunch Program



FY 2013 Purchases

Commodity	Total Cost	Total Pounds
Beef	\$336,073,991	157,372,000
Fish	\$29,447,679	9,799,432
Pork	\$28,015,842	20,244,040
Lamb	\$4,960,064	1,080,000
Chicken	\$322,233,225	333,658,900
Turkey	\$134,087,890	92,691,126
TOTAL	\$854,818,692	614,845,498

FY 2014 Purchases

(Week ending September 30, 2014)

Commodity	Total Cost	Total Pounds
Beef	\$300,063,969	113,336,000
Fish	\$49,045,944	25,140,576
Pork/Lamb	\$ 54,811,634	28,840,540
Chicken	\$260,300,878	254,567,800
Turkey	\$102,529,703	65,801,196
Egg	\$19,334,980	17,965,920
TOTAL	\$786,087,108	505,652,032

Market News

Providing current and unbiased, price and sales information to assist in the orderly marketing and distribution of farm commodities.



LPGMN Services

- Timely exchange of accurate, unbiased market information for poultry, eggs, livestock, meats, grain, hay, wool, biofuels, and organic grain and feed materials
- Collected under voluntary and mandatory parties
- Disseminated through public news media and the Internet
- Equal bargaining position for all parties

Livestock Mandatory Reporting

- | Enacted in 1999
- | First reports released April 2001
 - § Reauthorized September 2010 for 5 years
- | Reports cover 79% of slaughter cattle, 93% of boxed beef, 95% of slaughter hogs, 55% of slaughter sheep, and 38% of boxed lamb.



LMR Reauthorization

- i Up for reauthorization Sept. 30, 2015.
- i Producer trade associations (NCBA, NPPC, ASI) exploring potential regulatory changes to improve transparency and to keep the regulation relevant with current livestock and meat marketing practices.

More Market News Initiatives

- i Voluntary Monthly Grass Fed Beef Report
 - § Captures wholesale market price information for grass fed beef cuts.
 - § Includes prices paid for grass fed beef cattle.
- i AMS exploring ways to expand the report as the contact base grows.
- i Looking to add more information and graphs to further improve transparency.

More Market News Initiatives

- i What more can AMS do to improve organic market reporting and what commodity areas need more transparency (e.g. organic meat and livestock)?
 - § Partnered with NASS to conduct a survey of organic producers, which ended on March 15, 2014.
 - § Initial survey results showed much more outreach is needed in the organic community to raise awareness of market news

More Market News Initiatives

- i Working to expand market reporting into other growing niche' areas for livestock and meat products.
 - § Local markets
 - § Food hubs
 - § Farmers markets
 - § Farmers auctions
 - § Farm-to-school markets

LPS Research & Promotion



Research and Promotion

- Finances advertising, education, research, and market expansion
- Helps increase demand for the products
- Assessments collected from producers, feeders, exporters, importers, & first handlers



Research and Promotion

- i Annual assessments
 - § Beef \$70 million
 - § Pork \$70 million
 - § Soybean \$120 million
 - § Sorghum \$6 million
 - § Lamb \$2.3 million
 - § Egg \$25 million

- i Collectively AMS's 22 Checkoffs collect approximately \$850 million per year.

Beef Petition

- i The 2012 Census of Agriculture estimates 913,246 U.S. farms with cattle and calves.
- i At least 91,325 cattle producers required for Secretary to call referendum.
- i MCA has indicated to USDA it will start petition in September.
- i MCA would have one year to collect signatures.
- i To date, MCA has not been in contact with USDA to establish a start date.

Beef Petition

- i Montana Cattlemen's Association (MCA) wants to initiate a petition to call for Beef Checkoff referendum
- i USDA developed Guidelines for the Beef petition: <http://www.ams.usda.gov/beefpage>
- i If 10% of total number of cattle producers want referendum, Secretary conducts referendum within one year after USDA announces results

New Beef Checkoff

- i In September, Secretary Vilsack announced his intention to increase USDA's involvement to help ensure that cattle producers obtain the additional Checkoff resources they need under a framework with broad-based producer support.
- i USDA intends to create a new Order to govern these additional beef checkoff resources under the Commodity Promotion, Research, and Information Act of 1996 (Generic Act). The terms of that Order will be determined after USDA has gathered information from industry stakeholders.

New Beef Checkoff

- i In the near future, USDA will seek information from the industry on how to move forward with a new Order that will govern the collection and disbursement of these additional beef checkoff dollars. USDA's intent is to have this new Order in place by the end of 2015.
- i USDA will continue to seek input and work with beef producers and industry representatives so that producers will soon have a program that provides them the resources they need to expand markets, make research investments into new uses, and fund other critical demand building initiatives.

Country of Origin Labeling (COOL)



Country of Origin Labeling

- § Provides consumers information on which to base their purchasing decisions
- § Requires retailers to notify customers of the country of origin of covered commodities
- § Conducts retail surveillance audits
- § Investigates any consumer complaints received
- § Carries out enforcement provisions for both retailers and suppliers that include civil penalties of up to \$1,000 for each violation



Scope

- Muscle cut and ground meats: beef, veal, pork, lamb, goat, and chicken
- Wild and farm-raised fish and shellfish
- Fresh and frozen fruits and vegetables
- Peanuts, pecans, and macadamia nuts
- Ginseng
- Became effective March 16, 2009.

The COOL Program



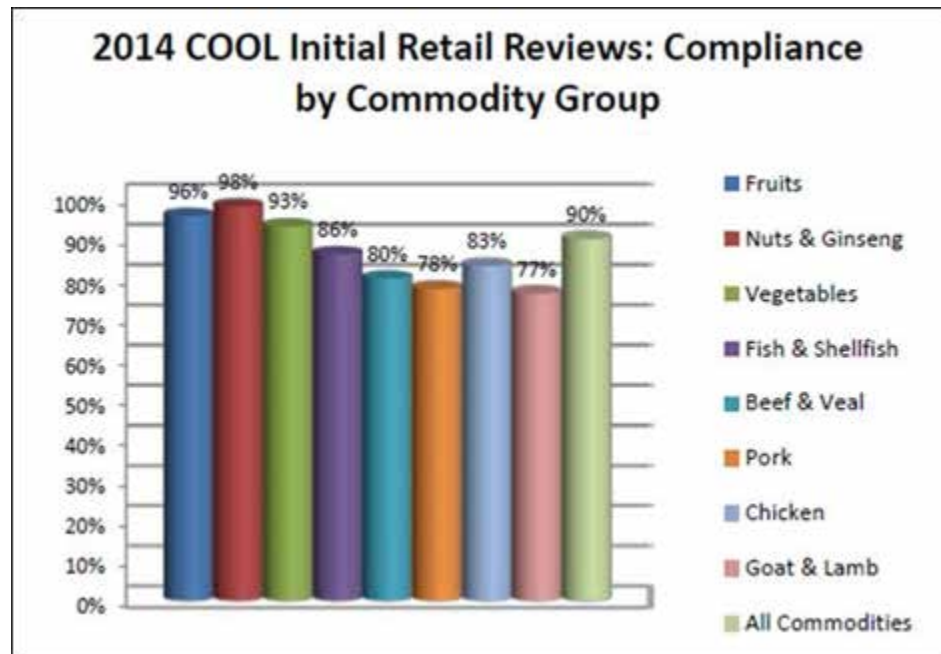
COOL Program Enforcement

- | Since implementing final rule in 2009:
 - o over 25,408 retail stores reviewed for compliance
 - o approximately 684 covered commodities audited through chain of commerce consisting of 1,529 suppliers.

COOL Program Enforcement

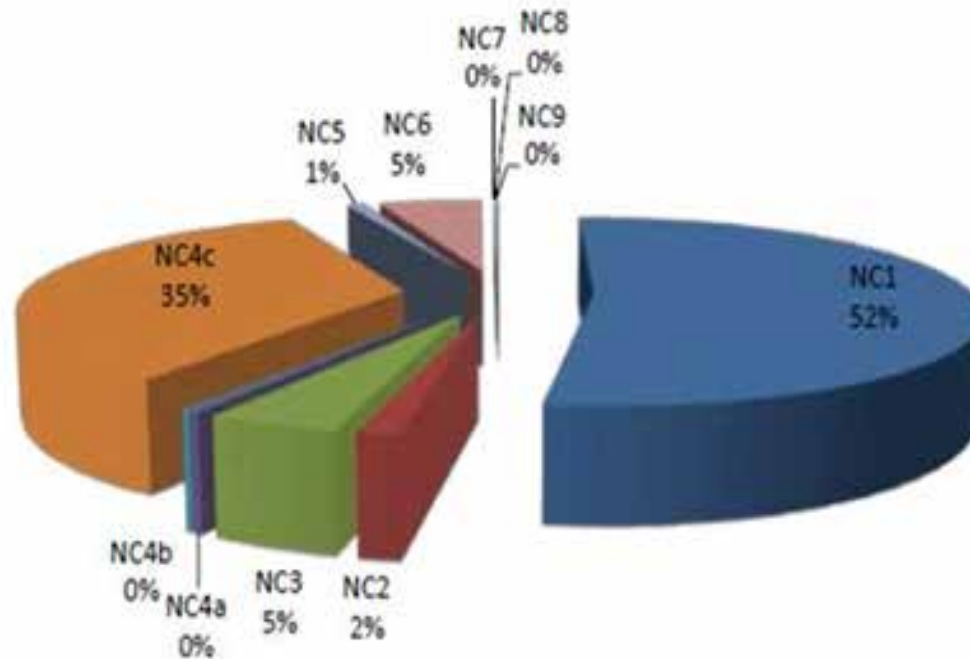
- | Cooperative agreements with 49 states. Federal employees conducted retail reviews in Kansas in 2014.
- FY 2014 allocation to state agencies valued over \$2,100,000. (3,335 retail reviews assigned.)
- Substantial training efforts for approximately 350 State Officials.
 - Webinars
 - Workshops in CA., VA., and SC.

2014 COOL Program Compliance



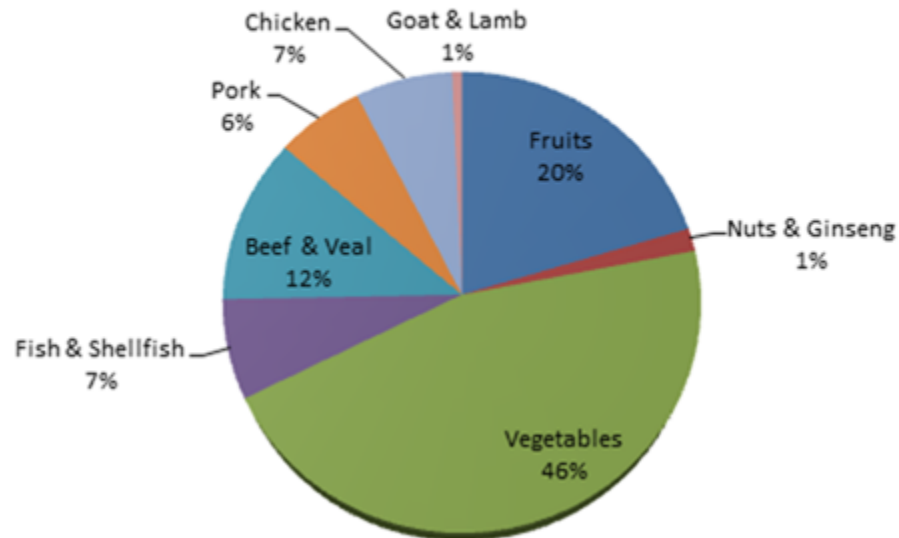
2014 COOL Program Compliance

2014 COOL Initial Retail Reviews: Non-Compliance by Code



2014 COOL Program Compliance

2014 COOL Initial Reviews: Commodity as a Percent of all Covered Commodities Reviewed



Agricultural Analytics Division

- Provides a wide range of economic, scientific, statistical, mathematical, and market analytic expertise in support of both Federal Government and industry.



EGGS

Production
April table egg production totaled 580 million dozen, up 3 percent from April 2013. There were 91.7 million broiler-type hatching egg produced, down 2 percent from last year. The broiler-type laying flock on May 2 was 51.5 million hens, even with 2013. Egg-type hatching egg production was 75 million eggs, down 6 percent from a year ago. Shell egg broken totaled 186 million dozen during April 2014, up 4 percent from April a year ago, and 3 percent above the 181 million broken in March. On May 2, the number of birds in the table egg flock was 295 million, up 2 percent compared to a year earlier.

Price
Egg prices had their normal late spring bounce in May. After their inevitable post-Easter crack, the price of one dozen large Grade A eggs rose 15 cents during May, closing the month at 138 cents/dozen. The price of breaking stock followed suit, rising 16 cents during the month and ending at 112 cents/1000. Liquid egg white prices have recently seen record highs. The average weekly price for liquid egg whites between April and mid-May (the latest available reported price) was 121 cents/lb, 78 percent above the 67 cents/lb average for the same period in 2013 and the last reported price of 127 cents/lb is an all-time high value. Demand for egg whites has risen steadily as several fast food chains have added egg white-based menu items over the past year in response to a mini health scare driven by concerns over cholesterol in egg yolks. The price for liquid egg yolk, in contrast, has fallen sharply this year. In response to egg-white supply shortages and increased prices, the Netherlands currently has an equivalence request in process with the Food Safety and Inspection Service to allow it to export egg products to the U.S. The process is expected to be completed over the next 60–90 days.

International Trade
Table egg exports in April were 13.7 million dozen valued at \$15.5 million, up 13 percent in volume and 36 percent in value compared to March, but down 24 percent and 5 percent, respectively, compared to April 2013. Egg product exports in April were valued at \$14.9 million dollars, up 2 percent from March but down 2 percent from April 2013. Year-to-date, table egg exports are down 4 percent in volume but up 17 percent in value compared to the same period in 2013, while egg products are up 6 percent in value.

Production
April lamb and mutton production rose to 15.2 million pounds, up 13 percent from both March 2014 and April 2013. Sheep slaughter totaled 221,500 head, 15 percent above last year. The average live weight was 137 pounds, down 3 pounds from April a year ago. Lamb and mutton in cold storage was 4 percent lower than the month before, but 25 percent higher than year earlier levels.

Price
Negotiated slaughter lamb prices (Domestic Prime & Choice, under 170 pounds) dropped more than \$10/ret to \$341 at the end of May, and closed the month 39 percent below the historical average price for 2010-2012, but 11 percent above last year's price. The lamb cutout value fell 59 in May to \$360, 29 percent higher than in 2013 and 1 percent higher than the 2010-2012 average. Ling of lamb prices dropped \$15 since the start of May to \$362 per car, less than 1 percent below the historical average, but 20 percent above the price in 2013. Boneless lamb shoulder meat fell \$30 through May to \$136 per cwt, however, this remains 17 percent about the 2013 value, and 32 percent above the 2010-2012 average.

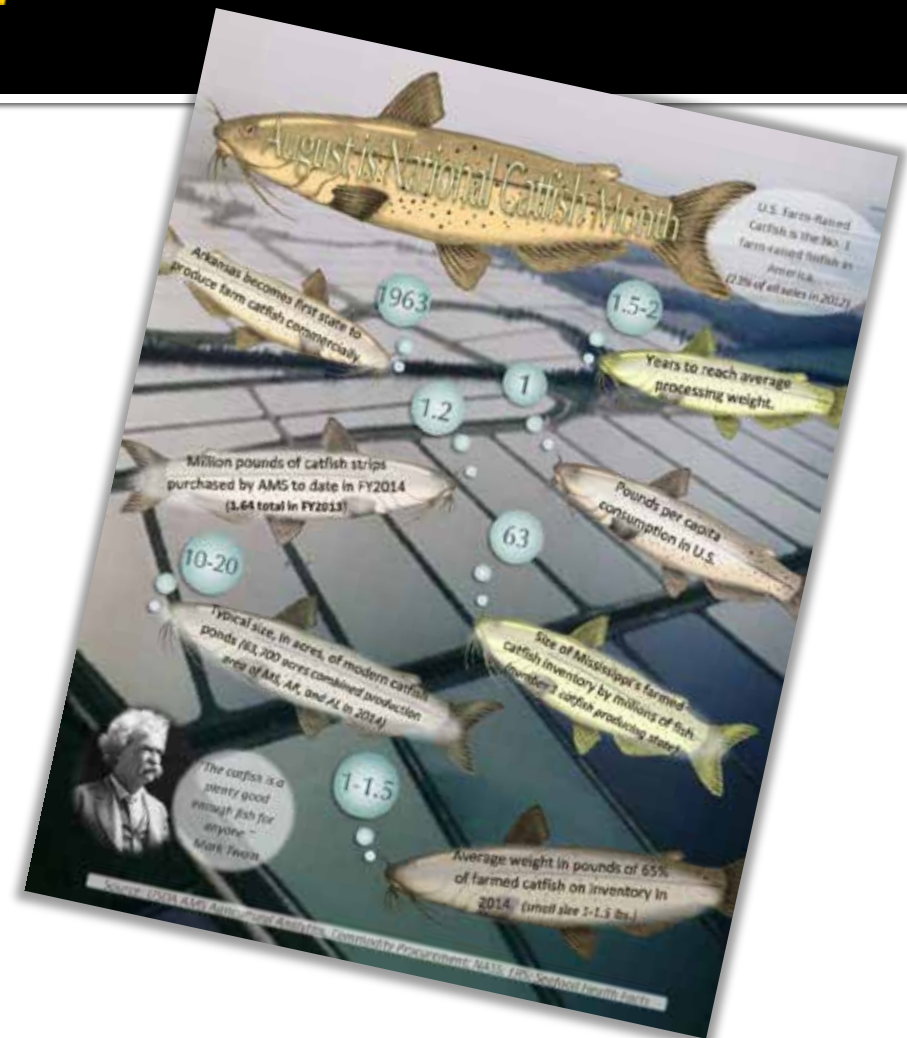
International Trade
The export market for lamb increased 80 percent in volume to 286.7 MT from March to April, while value of exports increased 78 percent to \$1.4 million. Relative to 2013, this was a decline of 34 percent in volume and 9 percent in value. Canada and Mexico were the largest markets for U.S. lamb and mutton. The U.S. imported 9.9 thousand MT of lamb in April, worth just under \$24 million, an increase in volume and value of 5 and 4 percent, respectively, over March. On a year-over-year basis, lamb import volumes rose 19 percent, and in value, rose 30 percent. Australia and New Zealand were the U.S.'s largest importing countries.

There were 72 weekdays, 4 Saturdays and no holidays in April 2014.

Source: USDA ARS Agricultural Analytics Division
This website represents approximate view of the market for the livestock products of the livestock and their equivalent to the equivalent of the Department. Page 1

The Economic Landscape

- Published monthly by LPS Agricultural Analytics Division.
- Distributed to interested parties upon request.
- Contact:
Michael Sheats
(michael.sheats@ams.usda.gov).



www.ams.usda.gov/AMSV1.0/AMSAgriculturalAnalytics

What's in the Economic Landscape?

- | Covers various commodities
- | Analysis of production (current, annual, monthly comparisons, etc.)
- | Prices (current, annual, monthly comparisons, etc.)
- | Export status (participating countries, volumes, values, etc.)
- | Includes special reports and features when necessary/available (e.g., holiday favorites; weather impacts; Super Bowl snacks.)

A Few Closing Points...



Questions and Contact

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...or visit us on the Web at:

<http://www.ams.usda.gov/AMSV1.0/LivestockandSeed>

Thank you!



United States Department of Agriculture
Agricultural Marketing Service

Livestock, Poultry and Seed Program