2011 National Beef Quality Audit
Significant Findings

All Sector Findings (Phase I)

- **No Two Market Sectors Define Quality the Same Way.** This suggests a discontinuity in economic signals. For example, sectors closer to the consumer place greater importance on traits connected with social values (animal well-being, sustainable production), yet price-per-pound remains the sole market signal throughout the chain.

- **Increased Transparency Is a Must.** The industry must do a better job of “telling its story” to the public. Consumers want to know the story behind their beef, including
  - how cattle feed affects the beef product
  - accessibility of health and management records
  - accessibility of age and source verification
  - accessibility of third party audits documenting humane handling practices.

  “How and Where the Cattle Were Raised” had the greatest odds of being considered a “non-negotiable requirement” by all sectors.

- **Increased Importance of Food Safety and Eating Satisfaction across All Sectors.**
  - The importance of Food Safety is increasing for packers, foodservice, and retailers (sectors closest to consumers).
  - Eating Satisfaction is the only attribute for which packers, foodservice, and retailers are willing to pay a premium. All beef sectors most frequently define Eating Satisfaction as being related to tenderness and flavor.

- **Additional Opportunities.** Producing beef with ideal lean:fat ratios and managing cattle and carcass weights to create more uniform, consistent products are areas with potential to add value.

Packer Sector Findings (Phase II)

- **Individual Animal ID.** Almost all cattle coming into the packing plant are identified, with a numerical increase in those individually identified with visual tags (50.6%) compared to the 2005 NBQA (38.7%).

- **Increased Awareness of the Importance of Animal Handling.** The number of bruises on cattle entering the plant is decreased from the number in the 2005 NBQA.

- **Increased Hot Carcass Weights.** Hot carcass weights are increasing (825 lbs. for NBQA 2011 vs. 793 lbs. for NBQA 2005), and 95.1% of carcasses range between 600 and 1,000 lbs.

- **Increased Availability of Prime and Choice.** The percentage of Prime and Choice is at a 20-year high (61.1% for NBQA 2011 vs. 54.5% for NBQA 2005).
• **Increased Percentage of Conforming Carcasses.** Carcasses meeting targets of U.S. Select or higher and USDA yield grades 1 – 3 total 85.1% compared to 81.7% in NBQA 2005.

• **Human and Instrument Grading Are Aligned.** Cattle of comparable average carcass weight showed surprisingly similar measurements on ribeye area, adjusted fat thickness, USDA yield grade and marbling scores whether assessed by human graders or by camera.

**Producer Sector Findings (Phase III)**

• **Healthy Cattle Equal Quality.** To cattle producers, quality equals “raising healthy cattle and calves” and “producing safe and wholesome beef.”
  - Ninety-six percent of producer respondents believe they can influence quality via activities such as preventative health care.
  - Ninety percent of producers have a working relationship with their veterinarian. Though 95% had some level of routine vaccination and treatment protocols, only 31% had a written plan. Greater emphasis must be placed on documentation.

• **Injection Site Improvements.** BQA and its educators should be credited for the drop in injection-site lesions since the first audit in 1991. However, improvement is still needed, particularly within the dairy segment, with 41% of dairy producers still giving injections in the animal’s rump.

• **Low-Stress Handling Is a Priority.** Use of good stockmanship and animal-handling skills is the producer’s #1 method of intentionally influencing quality. Ninety-eight percent do not use an electric prod as their primary driving tool.

• **BQA Is becoming widespread.** Eighty-seven percent of respondents say they have heard of BQA and 71% have attended a BQA training or completed an online training. Receiving a premium for following BQA protocols is an ideal.

• **Identification and Traceability.** Seventy-eight percent of respondents used individual animal ID (ear tag) as a means to keep track of withdrawal times for animal health products.