

# **The U.S. Beef Packing Industry:**

## **Magnificent Marvel**

**or**

## **Mega Monopoly?**



**MADISONVILLE FFA CHAPTER**

**P.O. BOX 879**

**MADISONVILLE, TEXAS 77864**

**(936) 349-8002**

**TEXAS STATE QUALIFYING EVENT:**

**DECEMBER 3&5, 2020**



# ISSUE SUMMARY

## 1. List of course(s) in which instruction occurred.

- Advanced Animal Science (14 students) – studied the progression of beef cattle marketing through the cow/calf, stocker, and finishing phases. Evaluated the merits of retained ownership and compared the beef cattle supply chain to poultry and pork production models.
- Livestock Production (17 students) – identified major beef packing companies and explored Dr. Temple Grandin’s contributions to processing facility design. Discussed the mandated and optional grading and inspection standards for beef harvesting and discovered domestic and international distribution channels for meat products.
- Professional Communications (22 students) – practiced professional interviewing etiquette and developed oral presentation and written communication skills.
- Dual Credit Economics (16 students) – used the beef market as a case study in tracking correlated supply and demand curves and compared the organizational structure of the majority of ranching operations to private and publically traded packing corporations.
- Business Information Management (14 students) – covered online research techniques, source credibility, and the use of Microsoft PowerPoint® software.

## 2. What is the nature of the issue and why is this issue important now?

The growing size of beef packing companies since the 1980’s remained largely unnoticed by the general public until the spring of 2020. When Covid-19 outbreaks led to the closure of twenty major beef packing plants and limited the production of many others, empty shelves in the meat markets of grocery stores was the result. As consumers sought to stock up on food during the early stages of the pandemic, demand quickly outstripped supply and the price of beef products increased by over a dollar a pound in just one week (Radke, 2020). Meanwhile, ranchers and feedlots were stuck with market ready cattle they could not sell. As cattle prices fell to extreme lows while beef prices hit all-time highs, economists, ranchers, political leaders, and consumers begin to question the structure of the United States beef packing industry (Nosowitz, 2020). The four largest companies control 84% of the U.S. market and just 50 large plants nation-wide account for 98% of beef processed in America (North American Meat Institute, n.d.). Seventeen senators recently signed a letter demanding the Federal Trade Commission investigate beef packers for violations of anti-trust laws. This action, as well as the recent introduction of several new bills in Congress designed to assist smaller packers and ranchers, offer proof that this issue has definitely come to the forefront within the livestock industry and in the minds of American consumers (Ward, 2020).

## 3. Who is involved in the issue?

There are multiple players involved in this debate. The companies that are being scrutinized in detail and are being accused of collectively holding monopolistic power are Tyson, Cargill, JBS, and National Beef, the four largest beef packing companies in the United States (Food and Water Watch, 2010). Ranchers and feedlot owners are directly impacted by the actions of these four companies as they jointly buy and process the lion’s share of market ready cattle (North American Meat Institute, n.d.). Indirect impacts are felt by grain farmers and feed suppliers because the amount and type of inputs cattle raisers will purchase depends on the price they anticipate they will receive when the livestock go to market. Government agencies come into play as USDA or state inspection is required at all packing facilities that vend products to the public (Davis, 2021). Retailers rely on packers for the meat products they stock and sell and are thus influenced by changes in the quantity and quality of processed beef. Finally, all consumers of beef products play a significant role in this issue as the overall demand for meat products drives the market and influences the price at all levels (Knox, 2020).

## 4. How can the issue be defined?

This forum falls primarily under the topic area of “Economy and Trade” as listed in the *Focusing on Agricultural Issues* instructional materials (The Council for Agricultural Education, n.d.) but it also touches on “Animal, Agricultural Policy, and Food Safety” categories as well. Our forum is titled “The U.S. Beef Packing Industry: Magnificent Marvel or Mega Monopoly?” because these words accurately capture the opposing viewpoints surrounding this topic. Supporters of the modern U.S. beef packing industry feel large companies can leverage their power to promote beef and negotiate export contracts. They argue that large companies run more efficiently and produce beef at a more economical cost, all while supporting the economy of rural areas and helping blue collar workers earn a good living (Shaffer & Ray, 2020). Opponents, however, feel that the lack of competition among packers has resulted in producers getting less return when they sell their cattle (Knox, 2020). They believe that large plants are impersonal, profit-driven entities that treat their employees poorly (Fowler, 2020). Antagonists believe that consumers and producers would be better served if the packing industry was more diversified, with more plants operated by more companies (Kelloway, 2019).

## 5. What is the historical background of the issue and what caused it?

Before the Civil War, meat production and processing was localized. Producers would take the “fatted calf” to a nearby butcher, who would process the animal for the customer or purchase the animal, process it, and sell the meat to a nearby market (Brewin et al., 2006). This changed quickly in the late nineteenth century however, as the federal government gave hundreds of acres of federal land to railroads (U.S. History Primary Source Timeline, n.d.). Significant dates regarding the United States beef industry and recent price disparities between live cattle and beef are:

- 1870 to 1900 – 170,000 miles of rail lines are built, quadrupling the nation’s rail capacity and creating a means of transporting and marketing meat to urban, high demand areas (U.S. History Primary Source Timeline, n.d.).
- 1870 to 1910 – Cattle drives push thousands of cattle from Texas to railhead cities in the Mid-Western United States. These cattle are then shipped to cities on the East Coast to meet the demand for beef in what is at that time, the more populated portion of the United States (Lamb, 2011).
- 1906 – Upton Sinclair’s novel, *The Jungle*, describes immigrant workers being taken advantage of by packing houses. The book shocks the public with descriptions of unsanitary practices and poor working conditions (Boyle et al., 2014).
- June 23, 1906 – The Pure Food and Drug Act and the Meat Inspection Act are signed into law by President Theodore Roosevelt. These acts greatly improve the wholesomeness of American meat products (Gaughan, 2004).
- October 15, 1921 – The Packers and Stockyards Act is signed into law by President Woodrow Wilson. Its purpose is to assure fair competition, safeguarding farmers and ranchers from “unfair, deceptive, unjustly discriminatory and monopolistic practices” (Offutt, 2009).
- 1980’s – President Ronald Reagan’s economic philosophies discourage government interference in the free market. As larger packers begin to buy out smaller plants, the federal government does not intervene (History Channel, 2018).
- December 9, 1985 – The Supreme Court rules in favor of Cargill in a lawsuit filed against this company by Monfort. Monfort’s claim that Cargill could not acquire Spencer Foods under anti-trust laws was not upheld, opening the door for more buy-outs and mergers (Organization for Competitive Markets, 2020).
- August 9, 2019 – A fire at a Tyson plant in Holcomb, Kansas leaves 3,800 workers with no income and removes six percent of the processing capacity of the industry (Gabel, 2019).
- April 2020 – Panic buying due to the rise of the Coronavirus creates sudden demand for beef. In the meantime, processing plants are shutting down or operating at reduced capacity. Cattle prices drop and beef prices soar, causing many to question the structure of the industry (Paschal, 2020).
- April 28, 2020 – President Donald Trump signs an executive order declaring meat processors as essential workers during the Covid-19 pandemic (Trump, 2020).
- March 2, 2021 – U.S. Senators Deb Fischer and Ron Wyden introduce the Cattle Market Transparency Act of 2021. This bill would establish regional price minimums for cattle and would mandate additional reporting from packers, providing market information producers can use to negotiate for a favorable price (Nepveux & Bennett, 2021).
- May 30, 2021 – JBS is cyberattacked by the Russian speaking hacker group REvil. The company shuts down processing plants across the U.S. and Australia and pays \$11 million in ransom to secure data (Collier, 2021).

## 6. What are the risks?

Opponents of mega-sized beef packing corporations:

- Claim that the ranchers’ revenue per head has dropped significantly because there is little market pressure for packers to earn business by offering a more competitive bid price for live cattle (Ogburn, 2011).
- Argue that workers are treated as robots who are asked to stand long hours, doing the same monotonous job thousands of times per day (Food Empowerment Project, 2020). Antagonists assert that profits are the main focus of daily operations, creating safety hazards and unreasonable demands for employees (Khara, 2020).
- Believe that the lack of diversity has created an unstable supply chain where disruptions at even one plant can severely impact our food supply (Weiss, 2010).
- Support pending legislation to offer government assistance to cattle producers and smaller processors, helping them compete more effectively in the market (Paschal, 2020).

## 7. What are the benefits?

Supporters feel large packing plants better serve the United States because:

- Large packers spend considerable resources promoting beef to retailers and negotiating export contracts, helping American ranchers sell more beef (Skerritt, 2020).
- Workers are trained to specialize on one or two tasks and earn significantly more revenue with faster promotion potential than comparable entry level jobs with no education requirements (Tyson Foods, 2020).
- Independent inspectors are required to be on-site when the plant is harvesting livestock, assuring compliance with accepted food and worker safety policies is strictly enforced at all times (Gaughan, 2004).
- Their efficient operation keeps the price of beef lower than is possible with smaller plants, making high quality protein more accessible to all consumers (Skerritt, 2020).

## 8. Is there strong disagreement on how the issue should be solved?

Yes. Our forums have revealed that feelings run deep on both sides. There is a belief among both ranchers and packers that the other party does not care or understand the demands and market pressures they deal with (Newlin, 2020).

Because of this mistrust, it would appear government intervention will be the most likely scenario for resolving the widening gap between producer and packer. The progression of this issue will absolutely impact Texas as the number one beef producing state (Texas Department of Agriculture, 2021) and Madison County, as beef cattle yields \$17 million in revenue to our local economy each year (Census of Agriculture, 2012).



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#### Additional Assistance

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## LOCAL FORUM PRESENTATIONS

When	Where	To Whom	# Present
October 1, 2020	Madisonville, TX	Madisonville Noon Lions Club	9
October 6, 2020	Madisonville, TX	KMVL Radio	2 + Listeners
October 13, 2020	Madisonville, TX	Mayor Bill Parten and Madisonville City Council	15
October 13, 2020	Madisonville, TX	Texas Aggie CattleWomen [sic]	37
October 16, 2020	Madisonville, TX	Madison County Farm Bureau Board of Directors	14
October 19, 2020	Madisonville, TX	Madisonville CISD School Board	15
October 19, 2020	Madisonville, TX	MHS Ag Department Advisory Committee Meeting	8
October 21, 2020	Madisonville, TX	Representative Trent Ashby	1
October 27, 2020	College Station, TX	Texas A&M AgriLife Extension Headquarters	4
October 27, 2020	College Station, TX	Texas Workforce Commission / BVCOG	7
November 2, 2020	Madisonville, TX	Bedias Creek Soil and Water Conservation Board	8
November 3, 2020	Madisonville, TX	STX Beef Processors - Mr. David Jacobs	2
November 4, 2020	Madisonville, TX	Madison County Beef and Forage Committee	6
November 5, 2020	Austin, TX	Texas & Southwestern Cattle Raisers Association	3
November 5, 2020	Austin, TX	Texas Public Policy Foundation	7
November 5, 2020	Austin, TX	BCL of Texas	7
November 5, 2020	Austin, TX	Texas Department of Agriculture	3
November 6, 2020	Madisonville, TX	Daughters of the Republic of Texas	8
November 9, 2020	Madisonville, TX	Texas Beef Council	3
November 9, 2020	Madisonville, TX	Alpha Delta Kappa Sorority	11
November 9, 2020	Madisonville, TX	MHS Ag Department Community Open House	25
November 10, 2020	Madisonville, TX	Texas Cattle Feeders Association	3
November 12, 2020	Livingston, TX	Sam Houston District Contest	3 Judges
November 19, 2020	Livingston, TX	Area IX Contest	4 Judges
November 25, 2020	Bryan, TX	Brazos Valley Livestock Commission	2
December 3, 2020	Zoom Presentation	Texas State Contest Semi-Finals	5 Judges
December 5, 2020	Zoom Presentation	Texas State Contest Finals	5 Judges

**Madisonville Noon Lions Club**  
**October 1, 2020 – Kimbro Community Center, 12:00 P.M.**  
**Number in Attendance: 9**



**The Lions Club thought this was a very relevant and timely topic for our community and current world events. They asked about the efficiency of large packing plants.**



Dear FFA Ag Issues Contest Judges:

On October 1, 2020, the Madisonville FFA Ag Issues Team presented to the Madisonville Noon Lions Club at 12:00 p.m. at the Kimbro Community Center. There were 9 Lions Club members present. The presentation on the large size of the beef packing industry was well received. In an agricultural community, this issue is very important.

Tammy Hoke *Tammy Hoke*  
 Treasurer, Madisonville Noon Lions Club

**KMVL Radio AM 1220 and FM 100.5**  
**October 6, 2020 - KMVL Radio Station, 8:00 A.M.**  
**Number in Attendance: 2 + Listeners**



**KMVL FM broadcasts on 13,000 watts, extending in a 70-mile radius into parts of twelve counties. The AM station covers Walker, Grimes, and Madison counties.**



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This letter is documentation that Madisonville FFA Ag Issues Team members were guests on KMVL's morning show from 8:00 A.M. to 8:30 A.M. on Tuesday, October 6, 2020. They participated in a live broadcast with morning show hosts, Bill and Sharon Cavill. The morning show broadcasts on both our AM and FM stations and can be heard in 13 towns in the listening area.

*Paul Wright*  
 Paul Wright, Station Manager

**Madisonville City Council**  
**October 13, 2020 – Madisonville City Hall, 6:30 P.M.**  
**Number in Attendance: 15**



**Our mayor and city council asked about the economic impact this issue has on beef ranchers in our community and why there is such a price disparity in the market.**



*City of Madisonville*

210 West Cottonwood • MADISONVILLE, TEXAS 77864  
 Phone (936) 348-2748 • FAX (936) 348-3815

To the Judges of the Ag Issues FFA Event:

The City Council of Madisonville Texas was pleased to host Madisonville FFA students on October 13<sup>th</sup> at 6:30 PM. The students discussed the beef packing industry with the council, including an explanation of the market volatility created by the Coronavirus. These young people conducted a professional discussion and answered questions from the 15 audience members after the presentation.

Bill Parten, Mayor of Madisonville *Bill Parten*

**Texas Aggie CattleWomen**  
**October 13, 2020 – Online Zoom Meeting, 7:30 P.M.**  
**Number in Attendance: 37**



**The Aggie CattleWomen provided great feedback on electronic presentation adaptations and helped us refine our presentation to emphasize the most relevant points.**



The Madisonville FFA Chapter Ag Issues Team presented to Texas Aggie CattleWomen on October 13<sup>th</sup>, 2020. There were 37 Texas Aggie CattleWomen members in attendance for the 7:30 p.m. online meeting. Please contact Morgan Mathis at [morganleemathis@gmail.com](mailto:morganleemathis@gmail.com) if you have any further questions.

Sincerely,  
*Morgan L. Mathis*  
 Texas Aggie CattleWomen President  
 Texas A&M University  
 Animal Science Department

**TEXAS AGGIE**  
*CattleWomen*

**Madison County Farm Bureau Board of Directors**  
**October 16, 2020 – Lakeside Restaurant, 8:00 A.M.**  
**Number In Attendance: 14**



**As most of the board members are ranchers, they felt that beef packers are profit driven mega-corporations who do not reward ranchers adequately for production.**



Dear Judges of the FFA Ag Issues Contest:

On October 16, 2020 the Madisonville FFA Ag Issues team presented a debate over beef packing to the Madison County Farm Bureau Board Meeting. The breakfast meeting kicked off at 8:00 a.m. at the Lakeside Restaurant. There were 14 in attendance. The debate was very informative to our members.

Regards,  
Shirley Perry - Office Manager

**Madisonville CISD School Board**  
**October 19, 2020 – MCISD Central Office, 6:30 P.M.**  
**Number In Attendance: 15**



**Board member Dr. Jason Cleere is a beef specialist at Texas A&M. He taught us more about fluctuations in cattle prices and trends in the industry.**



Dear FFA Ag Issues Team Judges:

The Madisonville Consolidated Independent School District Board of Trustees was honored on Monday, October 19, 2020 to have the Madisonville FFA Ag Issues Team present at the 6:30 P.M. monthly school board meeting. The discussion truly made an impression on all 15 individuals present concerning beef packers and producers. The presentation was very informative and the team was extremely genuine in representing the opposing sides. We wish them well in all future competitions. God Bless and Go Mustangs!

Keith W. Smith  
Superintendent of Schools  
Madisonville CISD

P.O. Box 879 • Madisonville, Texas 77864 • Phone (936) 348-2797 • Fax (936) 348-2751



**MHS Ag Department Advisory Committee Meeting**  
**October 19, 2020 – MHS Ag Building, 7:30 P.M.**  
**Number In Attendance: 8**



**Upon being invited to speak at the advisory meeting we specifically invited a leading rancher Laura Rudis and owners of Jarrett's Meat Service to attend and teach us.**



I was honored to be a special guest at the MHS Ag Department Advisory Committee Meeting on 10-19-20. At this 7:30 p.m. gathering, I had the opportunity to listen the Ag Issues team discuss price disparity in the cattle market and the role the increasing size of processing companies plays in this. As a rancher, I offered insight on the difficulty faced by the reduction of competition among potential buyers. The team listened with eagerness and we enjoyed a stimulating discussion on the topic at hand.

Laura Rudis

**Representative Trent Ashby**  
**October 21, 2020 – MCISD Central Office, 9:30 A.M.**  
**Number In Attendance: 1**



**Representative Ashby was formerly employed by Cargill and offered valuable information related to standards of this company and the packing industry as a whole.**



STATE OF TEXAS  
HOUSE OF REPRESENTATIVES  
**TRENT ASHBY**  
District 57

Dear Madisonville FFA Ag Issues Team:

It was a pleasure to meet with you on October 21, 2020. I believe you chose an excellent topic to highlight. The presentation showed a great understanding of the beef industry and the players involved. I congratulate you on an impressive performance and wish the team much success throughout the competitions ahead.

Trent Ashby  
State Representative

**Texas A&M AgriLife Extension Youth Development Staff**  
**October 27, 2020 – 4-H Youth Dev. Center, 10:30 A.M.**  
**Number In Attendance: 4**



**In talking with the 4-H Youth Development Leadership Staff, we learned more about the fire at the Tyson plant and the resulting disruption in the supply of beef.**



To: Judges of the Ag Issues Event  
 From: Jana Barrett, Texas 4-H Youth Development Program  
 Re: Madisonville FFA Agricultural Issues Presentation on Beef Packing

It was a pleasure for the Texas 4-H Youth Development Office to have the Madisonville FFA Ag Issues Team present to us on October 27, 2020 at 10:30 a.m. It was great to see young people accept the challenge of understanding a topic that is multi-faceted and real-world. If you have any questions, please feel free to contact Jana Barrett at 979-458-0910 or jbarrett@ag.tamu.edu.

Sincerely,  
 Jana Barrett *Jana Barrett*

**Texas Workforce Commission / Brazos Valley Council of Gov.**  
**October 27, 2020 – BVCOG Board Room, 1:00 P.M.**  
**Number In Attendance: 7**



**The discussion at this venue centered on if the beef industry is becoming more like the poultry industry with vertical integration becoming more prevalent.**



Brazos Valley Council of Governments  
 3991 East 29<sup>th</sup> Street  
 Bryan, TX 77802



Dear Ag Issues Forum Judges:

On behalf of the seven staff present, it was a pleasure to visit with the Madisonville FFA Ag Issues team on October 27, 2020 at 1:00 P.M. at our office in Bryan. The students did an excellent job addressing the economics of the beef industry. This topic is at the forefront of agricultural issues and the team is to be commended for selecting such an important subject.

*Betsy Ann Reynolds*

**Bedias Creek Soil and Water Conservation District**  
**November 2, 2020 – Living Truth Church, 9:30 A.M.**  
**Number In Attendance: 8**



**The Soil and Water Conservation District asked about the environmental impact of raising cattle and talked about how ranchers could gain a stronger market position.**



**BEDIAS CREEK**  
**SOIL & WATER CONSERVATION DISTRICT #428**  
 120 South Elm, Suite #110, Madisonville, Texas 77864 (936) 348-2173  
 Post Office Box 217, Centerville, Texas 75833 (903) 536-2940

The **Bedias Creek Soil & Water Conservation District** would like to thank the Madisonville FFA Ag Issues group for your presentation titled **"The U.S. Beef Packing Industry: Magnificent Marvel or Mega Monopoly?"** on Monday, November 2, 2020 at the Living Truth Church at 9:30 A.M. The team was very well researched in each point of view and gave a wonderfully informative presentation. The eight individuals present were honored to hear this performance.

Charlie Price, Chairman

*Charlie Price*

**STX Processors**  
**November 3, 2020 – Online Zoom Meeting, 1:00 P.M.**  
**Number In Attendance: 2**



**Mr. David Jacobs of STX offered us much needed perspective from the packers' point of view. STX is a medium size facility that processes 2000 head per day.**



Laney Smith



9001 Leopard St.  
 Corpus Christi, TX 78409

Dear Judges,

On November 3rd at 1:00 PM, I had the privilege of viewing the presentation developed by the Madisonville High School FFA students on the pros and cons of modern, large-scale beef packing firms. It was evident to me that the Madisonville FFA Team put a lot of time and effort into this project. They did a thorough job researching the issues and fairly addressing the advantages and disadvantages.

David Jacobs  
 Quality Assurance Manager, STX Beef

*David Jacobs*



**Madison County Beef and Forage Committee**  
**November 4, 2020 – County Extension Office, 11:00 A.M.**  
**Number in Attendance: 6**



**The Beef and Forage Committee meeting provided us another chance to meet with local agricultural producers. We learned that retained ownership is now less common.**



**Madison County Extension Office**  
 300 School Street, Suite #101 Madisonville, TX 77864



To the Judges of the Ag Issues FFA Contest:

Please allow this letter to serve as documentation of the Madisonville FFA Ag Issues Team performance on 11-4-2020 to the Madison County Beef and Forage Committee. The presentation occurred at 11 a.m. to an audience of six participants. The topic was extremely timely and the team was well prepared. Thank you for including our committee in your list of presentations. Please let us know if we can be of further service.

Cassidy Meyer  
 Madison County Assistant Extension Agent

**Texas and Southwestern Cattle Raisers**  
**November 5, 2020 – TSCRA Legislative Office, 8:30 A.M.**  
**Number in Attendance: 3**



**Texas and Southwestern Cattle Raisers offered a good discussion on market influences on the price of live cattle and how supply and demand curves interact.**



Texas and Southwestern Cattle Raisers Association

1301 W. SEVENTH ST. • SUITE 201 • FORT WORTH, TEXAS 76102-2665  
 817-332-7064 • 800-242-7820 • F:817-332-6441 • WWW.TSCRA.ORG

Dear Judges:

The Madisonville FFA Agricultural Issues Team gave a presentation to the Government Relations Office of the Texas and Southwestern Cattle Raisers Association (TSCRA) on November 5, 2020 at 8:30 a.m. at the TSCRA Austin office, with three staff members in attendance. One of the most heavily debated topics in the cattle industry relates to achieving robust price discovery through increased negotiated trade. The team did a phenomenal job interpreting this issue and clearly presented each perspective in a palatable manner. Their approach was both easily understood as well as insightful for those of us that grapple with this policy issue on a daily basis.

Sincerely,  
 Kaleb McLaurin  
 Executive Director of Government Affairs, TSCRA



**Texas Public Policy Foundation**  
**November 5, 2020 – Texas Public Policy Building, 10:30 A.M.**  
**Number in Attendance: 7**



**This organization provides research to political agencies and leaders. They discussed the efficiency of operation that is seen with large processors vs. smaller companies.**



901 Congress Avenue  
 Austin, TX 78701



(512) 472-2700 phone  
 (512) 472-2728 fax  
 info@texaspolicy.com

To the Judges of the FFA Agricultural Issues Forum Contest:

We had the great pleasure of hosting the Madisonville CISD FFA team November 5, 2020 at our office on Congress Avenue in Austin at 10:30 a.m. The FFA students delivered an excellent performance, debating the issue of whether the beef packing industry has become a monopoly. We think Madisonville FFA is a stellar example of the rhetorical and analytical potential that is found in FFA youth across America and represents an ever scarce example of an institution that seeks to inculcate good civic virtue. All seven audience members present give them our vote of confidence.

Regards,  
  
 Graeme Taylor  
 Operations Manager

**BCL**  
November 5, 2020 – BCL Conference Room, 12:30 P.M.  
Number in Attendance: 7



**BCL is a consulting service for small businesses. They gave perspective on the challenges of running small businesses that are competing against big companies.**



1011 San Jacinto Blvd, Suite 500 | Austin | TX | 78701  
P: 512.912.9884 | F: 512.912.9869 | E: askus@bcloftexas.org

Dear Judges:

The Ag Issues team from Madisonville CISD presented to BCL of Texas on November 5, 2020 at 12:30 p.m. at the BCL conference room. Seven were in attendance to hear the performance as great points and counter points were debated. Should you have any questions feel free to reach out to me.

Pamela Guerra Garcia  
512-912-9884

**Texas Department of Agriculture**  
November 5, 2020 – TDA Press Conference Room, 2:00 P.M.  
Number in Attendance: 3



**Texas Department of Agriculture challenged us to think of the transportation costs of large vs. small processors and the resulting stress on the animal.**



TEXAS DEPARTMENT OF AGRICULTURE  
COMMISSIONER SID MILLER

Dear Judges of the Ag Issues FFA Competition:

Madisonville FFA students delivered an outstanding presentation on our modern beef production system to three staff members of the Texas Department of Agriculture on November 5, 2020 at 2:00 p.m. Jordan Gregory reported that significant time has obviously been invested in research. We encourage them to keep up the great work as future leaders of Texas.

Sid Miller

P.O. Box 12847  
AUSTIN, TEXAS 78711

TEXASAGRICULTURE.GOV

(512) 463-7476  
FAX: (888) 223-8861

**Daughters of the Republic of Texas**  
November 6, 2020 – Methodist Church, 10:00 A.M.  
Number in Attendance: 8



**These civically minded ladies questioned whether the federal government should enact legislation to limit the size of packing companies.**



Daughters of the Republic of Texas

On behalf of the Rev. John Haynie Chapter of the Daughters of the Republic of Texas, we thank the Madisonville FFA Ag Issues Team for presenting a program on beef production. This occurred Friday, November 6, 2020 at 10:00 A.M. at Wesley Hall of the First United Methodist Church. There were 8 persons in attendance. The students were professional and knowledgeable.

Maisie Temme, President

**Texas Beef Council**  
November 9, 2020 – Online Zoom Meeting, 1:30 P.M.  
Number in Attendance: 3



**The Texas Beef Council offered valuable insight into the promotional side of beef products. Packers actively promote beef, helping keep demand strong.**



TEXAS BEEF COUNCIL

Dear Judges of the Ag Issues Event:

On November 9<sup>th</sup> at 1:30 pm the Madisonville FFA Ag Issues team presented virtually to the Texas Beef Council. The group did a wonderful job preparing for the presentation with thorough research and organized points. Texas Beef Council is proud to work with students who have a passion for agriculture.

All my best,

Victoria Heller

Sr. Manager, Ag Communications and Education

**Alpha Delta Kappa Sorority**  
**November 9, 2020 – MHS Ag Building, 4:15 P.M.**  
**Number in Attendance: 11**



**The ladies of the Alpha Delta Kappa Sorority like to stay abreast of current topics. We talked extensively about impacts on local beef producers.**



**TEXAS EPSILON GAMMA CHAPTER**  
**District XV**  
**ALPHA DELTA KAPPA**

The Texas Epsilon Gamma Chapter of Alpha Delta Kappa would like to thank the Madisonville FFA Ag Issues team for presenting the pros and cons of the beef packing industry at 4:15 p.m. on November 9<sup>th</sup> at our meeting in the Madisonville High School Ag Building. The presentation was informative and all questions from the 11 in attendance were answered completely. Best of luck in your events.

Patti Rowley *Patti Rowley*  
 Secretary

**Ag Department Open House**  
**November 9, 2020 – MHS Ag Building, 6:00 P.M.**  
**Number in Attendance: 25**



**We had to limit attendance due to school health regulations. The maximum capacity audience asked us to compare smaller packers to the four large companies.**



Dear Judges of the FFA Ag Issues Contest:

I had the privilege of listening to the Ag Issues team present a vigorous discussion on the status of the beef packing industry. This occurred at the Madisonville FFA Community Open House held at the MHS Ag Building on November 9, 2020 at 6:00 p.m. The presentation was engaging and the students' ability to answer questions from the 25 in attendance was impressive. Each of the students maintained their poise and defended their respective positions with facts and research. I was very glad to be in the audience.

Sincerely,  
 Michele Armstrong *Michele Armstrong*

**Texas Cattle Feeders Association**  
**November 10, 2020 – Online Zoom Meeting, 1:15 P.M.**  
**Number in Attendance: 3**



**The Texas Cattle Feeders favored the current size and structure of the industry. They gave us information on processors' costs, equipment, and regulations.**



5501 I-40 Frontage Rd, Amarillo, TX 79106  
 (806) 358-3681

Dear Judges of the FFA Ag Issues Contest:

The Texas Cattle Feeders was privileged to hear a robust debate over American beef packers and the impact the consolidation of the meat packing industry has had on ranchers, workers, and consumers. The students tackled a very complex topic, with multiple factors impacting the supply and demand at each stage of the process. We were pleased to discuss the economics of the cattle market with these students on Zoom on 11-10-20 at 1:15 pm.

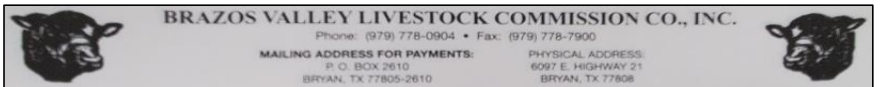
Sincerely,  
*Callie Ward*  
 Callie Ward



**Brazos Valley Livestock Commission**  
**November 25, 2020 – BV Livestock Sale Barn, 2:00 P.M.**  
**Number in Attendance: 2**



**Scott and Pete Scarmardo have forty years of experience in cattle marketing. They understand ranchers' frustrations but recognize the investment of packers.**



Dear Judges:

This letter is to certify that the Madisonville FFA Ag Issues Team presented to the Brazos Valley Livestock Commission at 2:00 P.M. on November 25, 2020. The meeting took place at the sale barn in Bryan, Texas. It was a pleasure to listen to these young people and help them understand the complexities of marketing cattle.

Pete Scarmardo *Pete Scarmardo*