Mapping A Decade of the Climate Policy-Livestock Industry Nexus in the United States

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Research Introduction and Overview

Methane emissions from livestock have been identified as a core contributor to changing global temperatures, among the highest sectoral contributors after the oil and gas industry. In October 2018, the IPCC released its second high-level report detailing methane emissions from the beef and cattle industry as a central contributor to rising global temperatures. Paired with this assessment, it offered a formula for reducing livestock-related emissions to , redirect the current climate trajectory.

Whereas global regulation and reduction of emissions from oil and gas warrants complex international commitments, checks and balances, pressure and transnational industrial transformation, a reduction in emissions from livestock is comparatively concentrated in the United States, as it is one of the two biggest industry producers and consumers globally. According to the 2018 Foreign Agricultural Service Circular Series report on Livestock and Poultry World Markets and Trade, 2019 US beef industry projected forecasted growth to reach, "a record 12.7 million tons." Exports were similarly set to grow to, "a record 1.5 million tons, almost 12 percent of production." In 2018, the United States produced more beef than India and China combined, although their collective 7.6B population far exceeds the US population of roughly 325M people. Although both have a fast-rising middle class, extreme poverty rates in both China and India along with religious beliefs which reduce beef consumption both make comparisons difficult. However, the United States also produced nearly twice as much beef in 2018 as the European Union, which boasts a totally population of just over 500M, where chronic poverty and nutrition rates are either roughly equal to or better than those found in the US.

According to a 2001 Foreign Agricultural Service Circular Series report on Livestock and Poultry World Markets and Trade, total beef production in the United States stood at 6,896,000 metric tons, which means that over an 18-year period, US-based production has grown by roughly 184%. Going back to at least 2014, the United States has been the world's leading producer of beef and veal, followed closely by Brazil, the EU, and finally, China.[1] As the material consequences of climate change begin to bear down on everyday life, what was potentially an abstract threat less than a decade ago for urban and rural civilian populations is now a lived reality across the globe, from protracted drought to unprecedented flooding. Advocacy toward adaptation, mitigation, and regulation have largely focused on oil, agriculture, and deforestation. Long acknowledged in the scientific community, public knowledge and awareness of the direct links between methane emissions produced by meat production and climate change is more recent. The EPA's GHG Inventory for 2017 shows that: "In 2017, the Agriculture sector was responsible for …8.4 percent of total U.S. greenhouse gas emissions. Methane emissions from enteric fermentation and manure management represent 26.413 percent and 9.3 percent of total CH_4 emissions from anthropogenic activities, respectively. Of all domestic animal types, beef and dairy cattle were by far the largest emitters of CH_4," and a rising percentage of total emissions.[2]

Given that the global center of livestock and beef production is located within the physical borders, and is subject to the legal and regulatory environment, of the United States, this research brief provides preliminary analysis on how different livestock industry interests and actors interface with a variety of Federal Offices, agencies, campaigns, and policy debates. Nearly doubling in production over a 20-year period, which also saw the scientific conclusion that methane emissions directly contribute to rising global temperatures, there are a wide range of research questions to consider regarding livestock industry growth, evolution, and industry-policy links.

This analysis brings into focus several parts of this evolving livestock industry-policy nexus and is broken down into six sections, including: (1) an overview of the structure of the beef and cattle industry and identification of key industry stakeholders at present; (2) a summary of significant changes in the structure or concentration of ownership in the beef and cattle industry over the last 25 years; (3) key turning points in the policy-industry nexus over the same period with exception to changes associated

with U.S. Farm Bills; (4) a constellation of lobbying relationships and campaign finance trends between 2006-2018, and; (5) a concluding section that outlines future areas for monitoring and analysis.

Methodology and Analytical Approach

The primary sources used to conduct this research include: (1) A review of relevant academic literature, policy literature, and corporate annual reports; (2) several policy, expert, and academic interviews; (3) use of datasets from the Office of Senate and House Records, records from the Federal Election Commission, and; (4) a scan of industry media and analysis websites and sources. All data used to generate these analyses are derived from relevant annual records from the Federal Election Commissions, Senate and House Offices of Public Records. All data was compiled by the Center for Responsive Politics through open data aggregation of these records onto its site, OpenSecrets.org. Datasets used for the following analysis come from datasets provided on this site.

This research brief sets out to map, at a high-level: trends and relationships in beef and cattle industry lobbying efforts over the last decade and into the present; industry segmentation of ownership, economic, and political interests and the distinctive or overlapping policy associations of each, as well as; analysis of proactive and reactive changes to Federal assistance programs for livestock producers directly related to environment and/or climate change.[1]

While dairy and hog producers both occupy significant portions of the livestock industry in the United States, with longer and more consistent histories of lobbying and policy involvement, neither has been given focus in this brief. Further, some of the largest non-animal commodity crops in the United States are produced to supply the livestock industry, and thus, are critical components of the livestock production industry and supply chain. These have also been excluded from this brief for the purpose of staying focused on industry actors that directly produce, process, or own livestock. However, for future research, both dairy and non-animal commodity crops should be incorporated into these analyses for a more complete picture of the livestock industry-policy nexus as it pertains to debates over methane emissions and climate change.

Key Beef and Cattle Industry Stakeholders

The structure of the beef and cattle industry is different from that of pork and poultry in a few ways. At a high level, the livestock industry involves three somewhat distinct, though interdependent, supply chains: animal feed, pork, and beef. This is interesting for research purposes since it means that political, economic, and investment interests might also be different across the three. Thus, their respective approaches to policy and regulation may also be varied. The poultry industry, and much of the pork industry, are vertically integrated, which means the major brands you see behind them own the animals from birth and contract out all the services needed to prepare them for slaughter and eventual processing. The beef industry relies more on a constellation of ranchers of different sizes that raise their own cattle, which they eventually sell to feedlots at auctions. From there, the cattle are then sold again to meatpackers. While the lifecycle and sale cycle of poultry and pork can be more closely linked with the corporations processing them, beef and cattle involve more disparate interests, pressures, and actors at each point of sale in the supply chain. Ultimately, this may mean that financial and political interests in the beef industry are more geographically and economically spread out than they are in others. This difference in market structure is the focus of this section.

In terms of cattle production, there are three stages, “They are usually independent. They are at different farms in different parts of the country and the animals move between those places.” First, there the cattle

producers, "numbering in the tens of thousands, spread across the United States, though with higher concentrations in regions with cheap land for grazing.[3]" Cow-calf operations, which represent farms and ranches where cows are born and raised on pasture, number more than 700,000 around the United States.[4] Cattle producers, distributed all over the country, are represented largely by the National Cattle Producers Association, which: "is the largest organization representing America's cattle industry. NCBA's membership includes more than 29,000 independent cattlemen and more than 64 state and breed affiliates representing over 230,000 cattlemen across the United States. For more than one hundred years, we have been dedicated to influencing public policy to improve producer profitability and in preserving the industry's heritage and future.[5]" After they are weaned, the cows are often then "moved to stocker or backgrounder operations, where they are still mostly raised on pasture and start giving a little feed, give them more veterinary attention and begin sorting them." As Dr. James R. MacDonald notes, this is an intermediary stage which is also geographically spread out around the country wherever there is grass and cheap land.

The next stage is much more industrialized, consolidated, and a relatively new addition to cattle production and processing: concentrated animal feeding operations (CAFO), in which animals are confined outdoors within a pen.[6] These industrial feedlots often contain hundreds of thousands of animals at a time. They are generally geographically concentrated around slaughter operations creating mutually constitutive economies of scale.[7] Animal feedlots have long been a second, somewhat separate, concentrated link in this chain. The concentration and scale are notable, "Feedlots with less than 1,000 head of capacity compose the vast majority of U.S. feedlots, but market a relatively small share of fed cattle," contrasted with those that have more than 1,000 animals and, "comprise less than five percent of total feedlots, but market 80- to 90-percent of fed cattle. Feedlots with 32,000 head or more of capacity market around 40-percent of fed cattle.[8]" The industry continues to shift toward a small number of very large specialized feedlots, which are increasingly vertically integrated with the cow-calf and processing sectors to produce high-quality fed beef.[9]" It is this shift to highly industrialized, densely populated feedlots that represents a change in industry structure in recent decades.

Finally, a handful of large meat-packing corporations comprise another distinct industry actor with a business model that depends on, but is separate from, each of the others. While industry associations tend to represent the interests of cattle producers at the base of production, the largest meatpackers tend to engage in lobbying activities individually through firms hired directly by the corporations, In total, "Four companies produce 85% of all the beef in the United States: Tyson Foods, JBS, Cargill and Smithfield Foods.[10]" The largest among them, JBS, which is headquartered in Brazil, "has more than 230 thousand team members in 2017, has over 300,000 customers (including retail chains, wholesale clubs, and food service distributors) with production units more than 15 countries and commercial offices in more than 20 countries." Just over half (52%) of JBS's total revenue is generated in the United States, and the company's overall net revenue in 2017 was $51.5B, with a net profit was $7.5B.[11]

Changes in Beef & Cattle Industry Structure – 90s to Present

Several significant changes to market structure, demand, and concentration stand out in the beef and livestock industry over the past 25 years. This section highlights three: feedlot and meatpacker consolidation, growing demand from export markets, and technological change.

Technology and export markets have shaped incremental changes in the livestock industry over the last few decades. Changes in technological efficiency contributed to consolidation across livestock and non-animal industries alike over the same period. While nearly every part of non-animal agriculture experienced consolidation, beef and cattle remained comparatively distributed excepted for the rise and consolidation of feedlots and slaughterhouses, "On the crop side, the equipment we use is bigger, faster (crop sprayers), than what we used in the 1970s. Farmer can then manage more acres. In the last 20 years,

that equipment has gotten a lot smarter." For livestock, technologically-enabled efficiencies have been concentrated in, "livestock housing, feeding equipment, manure handling equipment." Most of these technologies are useful in feedlots.

Export markets have also enabled new opportunities for livestock industry growth over the past 20 years as "Beef consumption in US had peaked in the 70s, with per capita consumption having declined compared to poultry consumption, which has continued to grow in the United States." However, beef exports continue to climb as middle-class markets increase demand for beef and preferential trade agreements prioritize those imports from the United States. While all beef industry actors celebrate growing exports, feedlots and meat-packers can process meat imported from neighboring countries, putting these actors at odds with cattle producers in the United States regarding pricing and sourcing.[12]

In addition to technological change and exports, feedlot consolidation has significantly shifted industry structure and dynamics, perhaps even more so than the others.

In the 1960s, feedlots were much smaller and more distributed. Over a 30-year period through the 1990s, "…that industry developed into something more industrialized, with firms that now own multiple feedlots." Some of these lots have railroads running through them and nearly 100,000 animals warehoused. Share of market ownership has also shifted, "In 1980, the four largest meatpackers controlled 35% meat production in the US By 90s they controlled 80-85%, with rapid consolidation happening in the 1980s and 90s." MacDonald noted that two major changes contributed to this shift: (1) Bigger plants were built to drive better economies of scale, and; (2) cost-advantages achieved by big companies in the 80s through breaking unions and, subsequently, dropping wage premiums. Together, these two factors contributed to accelerated geographic and ownership consolidation in the meat-packing industry. Building more bigger meat-packing plants created demand for co-located feedlots which could also accommodate the same volume of animals, prompting an additional layer of geographic consolidation, "Slaughterhouses and feedlots consolidated together into pretty big operations, enabling co-located feed and slaughter operations.[13]"

The January 2018 purchase of JBS USA's Five Rivers Cattle Feedlot, an 11 feed yard operation with 980,000 cattle stretching from Oklahoma to Idaho--the largest feedlot cattle operation in the world--for $200M by Pinnacle Asset Management proved a hallmark in this timeline.[14] The sale brought two things into focus.

First, it was the first time in decades that, "no major U.S. meatpacker (including today's three major players: JBS, Cargill, and Tyson) own any cattle." The behemoth Five Rivers Cattle Feedlot, "…isn't a rancher, a feedlot operator or even a meatpacker. Instead, it's Pinnacle Asset Management, L.P., 'a private … alternative asset management firm,' based at 712 Fifth Avenue, New York — just catty-corner from Trump Tower and only three blocks south of Central Park.[15]"

Second, it signaled that asset managers are key players in the beef and cattle industry. In Pinnacle Asset Management's announcement of the acquisition, it cited two additional asset managers that would be operationally or strategically involved including Arcadia Asset Management and Ospraie Management.[16] This completely new set of actors quickly became the subject of discussion and debate among industry analysts, "Three new firms are now the functional equivalent of the former one and none have explained what their exact roles in America's biggest cattle feeding company will be other than to supply cattle to its former owner.[17]" Mega-feedlot sales have been routine over the past few years, including large sales by Cargill in its shift away from cattle feed, the largest lot with capacity for 155K+ cattle at any given time.[18]

Significant Shifts in the Industry-Policy Nexus – 90s to Present

Beyond internal industry changes, industry-policy interactions reflected different dynamics over the past few decades. The main arenas for these changes have been in environmental subsidies, disaster assistance policies, Farm Bills, trade negotiations, and broader environmental and climate policy debates. This section aims to provide insight regarding the industry-policy nexus related to climate change focusing on disaster assistance and environmental subsidies. The Farm Bills and international trade proposals and agreements are mentioned, though largely absent from overall analysis, and would benefit from specialized focus in future reports.

Environmental and conservation subsidies, paired with disaster insurance programs, compromise the lion's share of Federal public assistance for the livestock industry, related to the environment and, in theory, to climate change.

In a 2018 USDA report which analyzed three disaster assistance programs—the Livestock Forage Program (LFP), the Livestock Indemnity Program (LIP) and the Emergency Assistance for Livestock, Honeybees, and Farm-Raised Fish (ELAP) programs—all were ad hoc in 2008 and have since become permanent parts of annual Congressional budgets.[19] Following a 2012-13 drought which caused unprecedented losses across livestock production heavy regions, a nationwide surge in LFP payments followed.[20]" From October 2011 until the passage of the 2014 Farm Act, authorization for these ad hoc programs had expired, and thus, they were disbursed reactively to loss caused by unprecedented levels of drought. The 2014 Farm Act, "…reinstated funding for these disaster programs, made them permanent, and modified their terms," while also instituting retroactive payments issued for losses occurring between October 2011 and January 2013 constitute a sizeable portion of LFP outlays to date.[21] The 2014 Farm Bill also raised the income cap for receiving disbursements to $900,000 in the 2014 Farm Bill, a figure nearly double the $500,000 income cap that had been in place a few years prior.[22]

Moving disaster assistance from ad hoc to permanent at this scale marked a shift, indicating that federal disaster assistance planning related to crops, at least since 2014, has codified the expectation of widespread, and frequent, damage caused by weather and climate extremes.

Another new *temporary* Federal program has since been adopted for disaster assistance called the Wildfire and Hurricane Indemnity Program, inaugurated with a $2.3B fund in 2017 to address accelerated and unprecedented damage from hurricanes and wildfires during that year.[23] Beyond Federal responses, states are formulating their own emergency responses to the effects of weather extremes on the livestock industry. In March 2019, the State of Nebraska, a national center of livestock production, opened an emergency livestock insurance program in response to extreme flooding, "Nebraska Gov. Pete Ricketts calls the recent flooding the "most widespread disaster we have had in our state's history. The Nebraska Cattlemen and the Nebraska Farm Bureau have announced disaster relief funds for cattlemen affected by the flood.[24]"

Paradoxically, while Federal proclamations seek to limit the attribution of these events to climate change, a new Federal and State programs have emerged to address its abrupt and unsustainable impacts as, "farmers can't really ignore storms or every 500-year floods coming every 10 years, more droughts, and more hurricanes. With weather extremes, farmers are starting to get hit in the face with it more." Livestock producers are also increasingly confronting the reality of increased disease among herds in the aftermath of natural disasters, "…one of the long-run concerns that we have regarding cattle and climate change is expectation that we're going to have more animal diseases and pests to deal with and pests.[25]"

Tracking industry-policy encounters with climate change through disaster assistance has more of an ad hoc, real-time quality to it, whereas environmental subsidies and conservation programs have adapted and

changed more incrementally. In terms of environmental subsidies, there are, "Several hundred things you can apply for, some [of which] could probably be classified under climate adaptation and mitigation.[26]" The Environmental Quality Incentives Program (EQIP) is a cost-sharing program which provides subsidies to farmers implementing environmental quality safeguards into their farming practices and infrastructure, "From weather to pests, and from a lack of time to markets, each American farmer faces a unique set of challenges. It helps agricultural producers confront those challenges – all while conserving natural resources like soil, water and air.[27]" The program works one-on-one with farmers to design a custom conservation plan aligned with their economic interests, after a bidding and approval process. A certain amount of that budget is, " directed specifically to livestock operations, roughly 60%." The program was expanded in the late 90s and 2000s, with larger subsidies going to larger farms, "Now, the bigger the farm, the bigger the subsidies. Because larger farms are more mechanized with less labor, the subsidies basically allow them to have a bigger income. It's not based on economies of scale. It's economies of size. The efficiency doesn't get much better but the volume is incredibly high. That's what feeds into the consolidation of the industry.[28]"

Paired with U.S. Farm Bills, NAFTA "has played a major role in expanding the CAFO model of production for pork, poultry, beef and dairy. The agriculture sector is [now] the fifth-highest source of GHGs in the U.S., according to the EPA. The primary sources of agriculture emissions are linked to large-scale industrial operations—the heavy use of synthetic fertilizers (linked to the GHG nitrous oxide) particularly for corn, and methane emissions associated with livestock (mostly from confined animal feeding operations or CAFOs). California has identified methane emissions from their giant dairy CAFOs as an important target for the state's climate mitigation strategy." [29]As EQIP sought to align environmental safeguards with economic interests, the program inadvertently this incentivized consolidation, favoring "…fewer and larger enterprises has brought environmental issues to the forefront of public policy regarding the U.S. livestock industry. As animal density (number of animals per unit of land area) increases, so do concerns regarding air and water quality, occupational health, and waste management.[30]"

According to the Environmental Protection Agency site which provides guidance on rules and regulations related to different agriculture sectors, CAFO environmental regulatory protocols and indicators relate to water contamination and air quality (from waste), among other categories focus primarily on mitigating measurable pollution to the local environment.[31] There are no categories which deal with GHG emissions as there is no corresponding National Clean Air or Water Act against which they can be upheld or enforced.

Beef and Cattle Industry Lobbying Efforts, Activities and Firms –2008 to 2018

Lobbying takes place across all centers of industry production and activity and actively engages Federal and local electoral campaigns, legislative bodies, and other Federal Agencies including the EPA, USDA, OMB, and USTR among others. The following section shares lobbying trends and analysis by industry and industry association actors as well as trends among recipients—whether individual elected officials, parties, or specific agencies. All data used to generate these analyses are derived from relevant annual records from the Federal Election Commissions, Senate and House Offices of Public Records. All data was compiled by the Center for Responsive Politics through open data aggregation of these records onto its site, OpenSecrets.org. Datasets used for the following analysis come from datasets provided on this site.

According to data from the Senate Office of Public Records, 2018 spending by lobbyists representing the beef and pork industry reached $3.8M, with beef and cattle interests alone accounting for approximately $1.7M, or 44%. Compared to 2001, when total lobbying expenditures peaked at $840K and beef and

cattle interests accounted for roughly $640K, or 76%. Since 2001, although beef lobbying expenditures have nearly doubled, it has slowed in compared to overall livestock lobbying which has nearly tripled.

Top 20 Members of Congress Receiving funds from PACs and individuals giving $200+ associated with the Livestock Industry[32]

			2012	2014	2016	2018
Name	State	Party				
Ted Cruz, Texas	TX	Republican	-------	$43,950	$444,818	$279,968
Marco Rubio	FL	Republican	-------	-------	$154,476	-----
Steven Daines	MT	Republican	-------	$145,175	-------	
Denny Rehberg	MT	Republican	$124,549		-------	
Steve Pearce	NM	Republican	$74,555	$73,467	$113,526	----
Mitch McConnell	KY	Republican	$42,700	$70,225	-------	
Greg Gianforte	MT	Republican	-------	-------	-----	$258,681
Jon Tester	MT	Democrat	$64,133	-------	-----	$170,781
Beto O'Rourke	TX	Democrat	-------	-------	-----	$111,410
Mike Conaway	TX	Republican	$59,700	$88,100	$83,450	$100,165
Will Hurd, Texas	TX	Republican	-------	-------	$102,475	$85,100
Paul Ryan	WI	Republican	-------	-------	$100,670	
Devin Nunes	CA	Republican	-------	-------	-----	$71,743
Andy Barr	KY	Republican	-------	-------	$69,737	$69,925
Greg Walden	OR	Republican	-------	-------	$43,826	$64,178
David Valadao	CA	Republican	-------	$56,650	$86,900	$58,619
Randy Neugebauer	TX	Republican	$55,000	$45,200	-------	-------
Tom Udall	NM	Democrat		$45,100	-------	-------
Kevin McCarthy	CA	Republican	$35,190	$46,800	$86,500	$57,600
Martha McSally, Arizona	AZ	Republican	-------	-------	-------	$48,178
Jeff Denham, California	CA	Republican	-------	$54,800	-----	$46,950
Bill Cassidy	LA	Republican	-------	$53,150	-------	-------
Pat Roberts	KS	Republican	-------	$48,750	-------	-------
Frank Lucas	OK	Republican	-------	-------	-------	-------
Kristi Noem	SD	Republican	$48,550	-------	-------	-------
Quico Canseco	TX	Republican	$46,450	-------	-------	-------
Jim Costa, California	CA	Democrat	$39,100	$47,150	$61,699	$46,897
Mike Enzi	WY	Republican	-------	$42,050	-------	-------
John Boehner	OH	Republican	-------	$41,560	-------	-------
Scott Tipton	CO	Republican	-------	$40,300	$59,625	-----
Michael Bennett	CO	Democrat	-------	-------	$53,480	-----
Chuck Grassley	IA	Republican	-------	-------	$49,600	-----
Pete Gallego	TX	Republican	-------	$40,500	-------	
Roy Blunt	MO		-------	-------	$45,550	-----
Cory Gardner	CO	Republican	-------	$103,115	-------	
John Cornyn, Texas	TX	Republican	-------	$117,750	-----	$46,000
Ron Paul	x	Republican	-------	-------	-------	-------
Roger Marshall, Kansas	KS	Republican	-------	-------	-----	$43,700
Bill Nelson, Florida	FL	Democrat	-------	-------	-----	$42,852
Kevin Brady	TX	Republican		-------	$49,400	-----
Mac Thornberry, Texas	TX	Republican	$67,025	$83,400	$68,725	$38,325
Ryan Zinke	MT	Republican	-------	-------	$61,699	-----
Jerry Moran	KS	Republican	-------	-------	$43,325	-----
Bernie Sanders	------	Democrat	-------	-------	$41,975	-----
Doug LaMalfa, California	CA	Republican	-------	-------	-----	$36,175
Dean Heller, Nevada	NV	Republican	-------	-------	-------	$35,541
Steven A King	IA	Republican	$34,750	-------	-------	-------
Allen West	FL	Republican	$33,755	-------	-------	-------
Total			$725,457	$1,287,192	$1,376,638	$1,712,788

Based on the chart above, of the top 20 Congressional candidates receiving funds from livestock related lobbying interests between 2012-2018, some patterns emerge in terms of geography, party approach, and strategic concentration of lobbying funds targeted toward those with higher levels of influence and authority in Congress.[33]

While there was a marked spike in Congressional funds received by livestock industry PACs between 2014 and 2016, corresponding with the 2016 campaigns and elections, increased levels of spending remained in the following Congressional election, contrary to trends from previous non-Presidential election years. There was almost three times as much spending during the 2016 Presidential election as in 2012 and almost twice as much spending in 2018 Congressional election from 2014. Over the course of six years, total funds received by the top 20 Members of Congress more than doubled, surging from $725,457 to $1,712,788.[34]

Reaching beyond state-level Congressional candidates, beef industry lobbying activities appear to focus on the most influential offices in Congress, including both Speakers of the House and Senate Majority Leader, as evidenced by the presence of Paul Ryan, Mitch McConnel, and John Boehner have all been among the top 20 members of Congress to receive campaign contributions from the livestock industry over the past decade. Additionally, the only year for which Ryan Zinke and Senator Bernie Sanders registered in the top 20 was 2016, when Zinke transitioned from serving as a House Representative for Montana to serving as the United States Secretary of the Interior for the Trump Administration, and when Senator Sanders ran for President.

While Congressional lobbying has skewed heavily toward Republicans or historically Red states, spending occurs across party lines, as well as in historically Blue states like California. In 2018, Democratic campaigns also received $1,633,014 from the livestock industry.

For the National Cattlemen's Beef Association, presidential election years earned greater levels of spending until the most recent Congressional election year in 2018. Congressional spending in 2018 surpassed Congressional spending in 2016, a Presidential election year. This is a departure from a trend which involved higher Congressional spending during 2008 and 2012 than in 2010 and 2014. Across all categories, companies, and sectors related to spending, NCBA's outspending of themselves in 2018 (a Congressional election year) versus 2016 (a Presidential election year) is exceptional.

Livestock Industry Campaign Contributions – 2000-2012[35]

*These data report contributions semi-annually in the period listed above except for the period between 2002-2006.

	'00	'08	'10	'12	'14	'16	'18
National Pork Producers Council	$200,000	$1,199,395	$1,126,549	$1,099,335	$870,860	$1,640,000	$2,040,000
Baca Land & Cattle Co	$280,000	---	---	---	---	---	---
National Cattlemen's Beef Association	$400,000	$328,620	$286,706	$329,481	$353,281	$356,269	$456,335
Ranchers-Cattlemen Action Legal Fund	$29,220	$130,000	$200,000	$175,000	$200,000	$200,000	$150,000
Turner Enterprises		**----**	$200,000	$200,000	$200,000	$40,000	----
Tejon Ranch		**----**	$140,000	$100,000	$140,000	$140,000	----
Contigroup Cos	$135,000	----	----	----	----	----	-----
Contigroup Companies	$80,000	----	----	----	----	----	----
Concerned Livestock Dealers	----	----	----	----	---	----	$110,000
Canadian Cattlemen's Association		$110,000	$110.000	$170,000	$210,000	$105,000	$90,000
Livestock Marketing Association	---	$80,000	$80,000	$80,000	$30,000	$86,000	$57,000
National Beef Packing	----	$52,000	$40,000	$40,000	$40,000	$40,000	$40,000
US Cattlemen's Association	----	$40,000	$40,000	$40,000	$40,000	$40,000	$40,000
Agricultural Air Group	$40,000	---	----	----	----	----	----
Hollister Ranch Owners Association	$40,000	----	----	----	----	----	----
King Ranch	----	$40,000	----	----	----	----	
Beltex Corp	----	$36,000	$36,000	$36,000	----	----	
Western Range Assn	-----	----	$20,000	-----	-----	-----	
Wolf Spring Ranches	$10,000	-----	----	----	----	----	----
Wool Council of Australia	$0	----	----	----	----	----	----
Western Range Assn	$0	----	----	----	----	----	----
Bar T Bar Ranch	$0	-----	-----	-----	-----	-----	-----
Beef and Lamb New Zealand	----	----	-----	----	$20,000	---	----
Creekstone Farms Premium Beef	----	$0	----	----	----	---	----
Farm Animal Welfare Coalition	----	$0	$0	$0	$0	$0	-----
Mooretown Rancheria	-----	$0	----	----	----	----	----
King Ranch	----	----	$0	----	----	---	----
Lynch Livestock	----	----	----	-----	$0	---	-----
Wonder Ranch	-----	----	----	----	----	$0	
Waibel Ranch	----	----	----	----	----	----	$20,000
Woolfolk Inc	----	$0	----	-----	----	---	----
Hidden Villa Ranch	-----	---	----	$0	$31,875	$22,500	----
Public Lands Council	----	$0	$0	$0	$0	$0	$0
Total (excluding Nat'l Pork Producers Council)	$1,014,220	$816,620	$1,042,816	$1,170,481	$1,265,156	$1,029,769	$963,335

Notably, total contributions have fluctuated with few clear or steady increases or decreases within the period analyzed, although there appears to be a peak in the 2012 Presidential election year. The most consistent lobbying expenditures between 2008-18 came from industry associations, with sporadic expenditures by individual ranches contracting firms directly. Industry association models of lobbying are in contrast to the individual lobbying firms representing or acting as subsidiaries of the largest meatpackers, including JBS USA.

Key industry association actors include the Canadian Cattlemen's Association, the Livestock Marketing Association, the National Beef Packing, and US Cattlemen's Association. Among the newest players are the Concerned Livestock Dealers, which contracted roughly $140K in lobbying activities by a firm called Meyers and X between 2017-18.[36] Two individual ranches stood among the others as consistently spending on lobbying activities between 2008-2016: Turner Enterprises and Tejon Ranch. Turner Enterprises is "a private company, manages the business interests, land holdings and investments of Ted Turner, including the oversight of two million acres in nine states and in Argentina, and more than 51,000 bison.[37]" Established in 1843 as a Mexican land grant, Tejon Ranch is located in Southern California with investments in real estate, agriculture, natural resource extraction, and conservation.[38] The total cost of contracting to these key players over the last 10 years just tops $6M.[39] Other big players seem to have

disappeared (or potentially reconfigured elsewhere) including two Contigroup Affiliates which gave a combined $215K in 2000, roughly 1/5 of total beef and cattle contributions that year.

The most recent changes in feedlot consolidation and sales have not yet been reflected in campaign contribution and lobbying trends, though with potentially significant efforts on the horizon.

While spending constitutes one metric of lobbying and influence, another is the frequency of lobbying activities by individuals or firms, related to specific legislation, policy proposals, or knowledge production by federal agencies. Within and across beef and cattle lobbying, the agencies most frequently cited in lobbying firm reports over the past ten years are the United States Department of Agriculture (USDA), Environmental Protection Agency (EPA), United States Trade Representative (USTR), OMB (Office of Management and Budget), and the House and Senate. These agencies register several hundred lobbying visits each year by just as many groups, from across the political spectrum.

The following chart highlights beef and cattle lobbyists who consistently register among the top 50 'clients' to the USDA from 1998-2018 (with a gap between 2000-2006), or who represent the top 5-10% of the total 500 to 900 lobbying groups visiting each year. Monsanto Co, the National Pork Producers Association, and the National Milk Producers Federation have been left in. Although not covered in this research brief more broadly, I have left these entities in for comparative scope and frequency.

USDA Agency Focus–Beef/Livestock in the Top 5-10% of Annual Lobbyists[40]

	1998	2000	2006	2008	2010	2012	2014	2016	2018
Total number of clients	512	758	775	925	954	873			
Total number of reports listing agency	522	776	798	950	975	888	823	703	842
Monsanto Co	4 reports	10 reports	6 reports	21 reports	16 reports	16 reports	12 reports	9 reports	---
National Pork Producers Council	3 reports	4 reports	5 reports	16 reports	14 reports	16 reports	13 reports	6 reports	10 reports
National Milk Producers Federation	3 reports	6 reports	7 reports	19 reports	16 reports	12 reports	15 reports	12 reports	12 reports
American Feed Industry Association	---	---	----	---	---	---	---	8 reports	---
International Dairy Foods Assn	4 reports	4 reports	6 reports	14 reports	8 reports	9 reports	8 reports	8 reports	8 reports
Agri Beef	---	---	---	---	---	8 reports	---	---	---
Smithfield Foods	---	---	---	10 reports	12 reports	---	---	---	---
Cargill	---	---	---	---	8 reports	8 reports	8 reports	8 reports	11 reports
American Meat Institute	---	---	8 reports	---	---	---	---	---	---
North American Meat Association	---	---	---	---	---	8 Reports	7 reports	---	---
McDonalds Corps	---	---	---	---	8 reports	?			
National Meat Association	---	---	---	8 reports	8 reports	?	?	?	?
JBS USA	---	---	---	8 reports	8 reports	7 reports	---	---	--
Select Milk Producers	---	---	---	---	---	---	---	---	9 reports
National Cattlemen's Beef Association	3 reports	4 reports	---	---	---	---	--	---	---
Ranchers-Cattlemen Action Legal Fund	---	---	4 reports	---	---	---	---	---	---
Nature Conservancy	---	---	4 reports	14 reports	9 reports	10 reports	10 reports	16 reports	19 reports

- When it says number of reports, it means the number of quarterly filings by lobbying groups which list this agency as a destination of lobbying in that quarter.
- Twenty years ago, beef industry lobbying at the USDA was virtually non-existent. While still comparatively low to its non-animal counterparts, there is a steadily rising presence of beef industry stakeholders including companies, newly consolidated feed associations. It is unclear whether this represents a decline or a low point in a cyclical process.
- In 2012 the top lobbying group for USDA was Monsanto. In 2016/2018 the top was the Nature Conservancy. This is a marked shift. Between 2012 and 2014, the Nature Conservancy surpassed Monsanto as the #1 lobbyist (measured by number of reports). This #1 spot is not just for lobbyists in agriculture, but #1 in terms of frequency (in 2018) out of 800+ groups. Although the presence of the Nature Conservancy implies that lobbying is not exclusive to industry actors, as the only environmental advocacy group consistently [apart from the occasional presence of a smaller, regionally specific group], lobbying at the USDA represents primarily industry interests.
- Cargill, Smithfield, and JBS have all lobbied the USDA. Cargill and JBS invested lobbying time and effort in the USDA since 2008 and 2010 respectively, though Cargill is the only company that has steadily focused lobbying efforts on this Agency, with increasing intensity since 2012. Smithfield appeared to try this strategy out, though just as quickly appears to have abandoned it.
- For broad comparison, pork and dairy have had a steady history of lobbying the USDA, while the beef industry's different key actors and sectors have had a more inconsistent presence.
- Pork and dairy have had a steady history of lobbying the USDA.

Lobbying Trends By and Among Major Meatpackers

Based on additional analysis from each company's spending, company-specific findings are below.

Smithfield PAC[41]

In the 2017-18 fiscal year, 32 individual Smithfield PAC donors contributed a total of $61,000 to individual candidates, with 34% to Dems ($9,500) and 66% to Republicans ($27,000). Tyson's contributions by party in 2018 were much more leveled, with 43% of the $415,089 going to Democrats. Overall, Smithfield's House contributions per candidate averaged $1,000-$,2000. The two exceptions to this---out of 25 House recipients---were a $4,000 contribution made to David Rouzer (R-NC), and a $3,000 to Mike Conway (R-TX). In the Senate, Smithfield's 13 recipients averaged slightly higher, with $1,500-$2,500 donations. Contributions at the state and local level outspent Federal contributions by about 15%; with $60,000 spent Federally, and just over $70,000 spent on state and local candidates.

Among Smithfield's PAC donors, all but five of the 59 PAC donors (who contributed $200+) work for either Smithfield affiliates, John Morrell affiliates, or Murphy-Brown LLC. Among these donors, 30% have registered occupations associated with John Morrell, including: John Morrell Inc, John Morrell, John Morell & Co. Roughly 52% of donors have registered occupations of Smithfield affiliates, including: Smithfield Farmland, Smithfield Foods Inc, Smithfield Global Products, and Smithfield Int'l.

Gregory Schmidt of Warsaw, NC was the largest donor to Smithfield's PAC in 2018, contributing $10,000 in two separate payments. While roughly half of donors gave twice, Joseph Sebring of Cincinatti, OH, gave 14 separate contributions of $200 throughout the year.

Tyson PAC

Over the last 10 years, Tyson Foods contributions to Federal candidates or House/Senate has exceeded $2M.[42] In 2018, Tyson's total contributions ($415,89) amounted to nearly six times that of Smithfield, targeting 100 House and Senate recipients, more than double that of Smithfield. Smithfield PACs contributed between $35-$36K each to House members serving on the House Appropriations and

Agriculture Committees. Similarly, the Senate Committees on Agriculture and Environment and Public Works both each represented contributions of more than $30,000 through donations to members serving on those committees. The Senate Committee on Appropriations represented $26,000 in contributions. Tyson's average spending per recipient was $2,945, however, the range of amounts given proved exceptional to other companies. More than 25% of Tyson's Congressional recipients received $4,000 or more, topping off in increments of $9,000-$12,000 per person.

Members of Congress who received $5,000+ from Tyson PAC in 2017-18

Cotton, Tom (R-AR)	Senate	$12,400
Fischer, Deb (R-NE)	Senate	$12,340
Tester, Jon (D-MT)	Senate	$10,300
Womack, Steve (R-AR)	House	$9,200
Stabenow, Debbie (D-MI)	Senate	$7,925
Shelby, Richard C (R-AL)	Senate	$7,500
Boozman, John (R-AR)	Senate	$7,250
Hill, French (R-AR)	House	$6,750
Duckworth, Tammy (D-IL)	Senate	$5,900
Brown, Sherrod (D-OH)	Senate	$5,575
Strange, Luther (R-AL)	Senate	$5,405
McSally, Martha (R-AZ)	House	$5,400
Nelson, Bill (D-FL)	Senate	$5,400
Aderholt, Robert B (R-AL)	House	$5,000
Diaz-Balart, Mario (R-FL)	House	$5,000
McCaskill, Claire (D-MO)	Senate	$5,000
Moran, Jerry (R-KS)	Senate	$5,000

JBS Affiliates

JBS lobbying firms register under several different names, with totals different for each one. Below I have shared analysis on different pieces of this whole, although it likely remains incomplete until distilled into a single constellation of parent and subsidiary companies with associated internal and sub-contracted lobbying firms mapped out for each.

JBS Swift & Co

JBS Swift & Co has the most partisan spending of the big four meatpackers. With nearly all its expenditures on Federal candidates or officeholders going to Republicans. One House Democrat (Clyburn, James E (D-SC) from SC received $1,000, as did one Senate Democrat (Bennet, Michael F (D-CO).[43] The lobbying arm spent double on the House than the Senate, with a total of $46,000 across both. Spending across all recipients ranged, on average, from $1,000-$3,000. Two Republican House Members, Kenneth R. Buck (R-CO) and Adrian Smith (R-NE), each received $5,000 in 2018.

Apart from the Senate and House, JBS has consistently lobbied the USDA since 2013. It has additionally lobbied the USTR, White House, EPA, and Dept of Energy, though only once every few years.[44] Tyson, on the other hand, has been actively and consistently lobbying the USDA and USTR since (with at least four reports annually for each) at least 2008. Tyson lobbying visits filed for EPA are more intermittent.[45]

Keys Group, LLC which lobbies on behalf of JBS SA (parent company JBS USA LLC) spent $408,000 lobbying the USDA in four separate reports in 2018. All four quarterly reports list $102,000 each, spent on the first and second lobbying the Senate, House, and USDA on "Meat Inspection, GIPSA, Immigration.[46]"

JBS Main Lobbying Firm: Keys Group[47]

	2012	2014	2016	2018
Beef Products, Inc	----	$150,000	$150,000	$150,000
JBS SA	$120,000	$480,000	$444,000	$408,000
Johnsonville Sausage	----	----	----	$30,000
Propel	----	----	----	$15,000
Rural Community College Alliance	----	----	----	$16,000
AdvancePierre Foods	----	$75,000	$180,000	----
Total	$120,000	$705,000	$774,000	$619,000

Keys Group's first and only client in 2012 was JBS USA, with a $120K retainer. Although JBS USA lobbying has steadily decreased since that year, Keys Group's contracts have more than quintupled.

Cargill PAC[48]

Cargill PAC has the most even spending across parties, with 49% going to Democrats and 51% to Republicans in the 2018 election cycle. House Democrats received 2/3 what their Republican counterparts received, while the inverse was true for the Senate. Contributions to Senate Republicans were just more than half of what was forwarded to their Democratic counterparts. Total spending in the 2018 election cycle was $95,500, just under 25% of Tyson's expenditures, with average donations far closer to Smithfield's ranging, on average, from $1,500-$3,000 per candidate. All but one of the 102 donations of $200+ came from just ten individual donors, nearly all of whom registered occupations affiliated with Cargill, including, Cargill Inc, Cargill Incorporated, Cargill Meat Solutions Corp, Cargill Inc Foreign Subsidiary, and Cargill Inc Foreign Subsidiaries. Apart from two donors who contributed $1,000 or more (one of whom contributed $8,000 in two segments), the remaining 99 donations were made by eight individuals in increments of $461, $220, remainder of Cargill donors contributed in increments less than $500. The most common amounts were $417, $416, $220, $208, and $200.

There were ten individual donors who contributed 102 separate donations during the 2017-2018 election cycle. This pattern of contributions is exceptional among the big four meatpackers, where individual contributions provided for others repeated, at most, twice over the course of the year.

Cargill PAC Recurring Individual Donors – 2018[49]

Name	**Occupation**	**Location**	**# of donations**	**Total donations**
MacLennan, David W	Cargill Inc	Wayzata, MN	**2**	$8,000
Kimmelshue, Ruth S	Cargill Inc	Wayzata, MN	24	$9,985
Willits, Alan D	Cargill Inc Foreign Subs & Cargill Inc	Ft. Worth, TX and Wayzata, MN	20	$8,320
Baudler, David P	Cargill Inc	Wayzata, MN	21	$4,620
Heithoff, Robert A	Cargill Inc	Wayzata, MN	23	$4,784
Bonecutter, Lee Paul	Cargill Meat Solutions Corp	Wichita, KS	1	$1,000
Scharfen, Jonathan	Cargill Inc	Washington, DC	2	$833
Keating, John	Cargill Meat Solutions Corp	Wichita, KS	3	$600
Teddy, Robert W	Cargill Inc	Charlotte, NC	1	$200
Warta, Charles R	Provimi North America Inc	Charlotte, NC	1	$200

Without any clear answers, the question that arises is why these donors chose very small recurring donations when larger donations are legally permissible.

Future Forecast and Considerations

Based on trends and analysis synthesized throughout this research brief, the concluding section outlines a future forecast of areas for greater or more consistent sub-analysis at the industry-policy nexus as it relates to greenhouse gas emissions regulation and climate adaptation or mitigation policy.

1) **Specialized focus on the evolving/emerging industry-policy nexus of the feedlot industry**
   - With accelerated concentration of ownership and economies of scale over the past 20 years, paired with a rise in ownership by a web of asset managers with no other previous stake in the livestock industry, this particular set of entities and owners is fairly new, and thus, there is limited to no information available on trends in political positioning or influence related to greenhouse gas emissions or climate policy. Political and financial influence from segmented industry perspective.
   - Neither dairy CAFOs nor non-animal commodity crops earned analysis in this research brief, however, both represent significant economic stake and interest in the current CAFO model and system. For that reason, it is important to draw out a comparative map of these three particular CAFO industry actors in terms of lobbying and messaging regarding methane emissions (with highly concentrated output from CAFOs).

2) **Monitoring rhetoric versus budgeting in disaster assistance and environmental subsidy trackers**
   - "Following-the-disaster-assistance-funds" is already providing insight on Federal (and State) policies toward the effects of climate change on livestock industry actors. As disaster assistance related to weather extremes transitioned from *ad hoc* and reactive to formal and annualized over the past ten years, there are likely to be pockets of acknowledgement that climate change must be considered more proactively due to its budgetary affect at all levels.
   - Along the same lines, as the realities of climate change linked weather extremes bear down on smaller and more distributed livestock producers, previously accepted messaging of climate change denial may be put into question. Where and how alternative messaging, tied to publicly funded disaster assistance, is provided is a different question.

3) **Deeper dives into complex conflicts of interest among industry-policy invested actors**
   - Analyze revolving door actors over the past twenty years to produce a picture of indirect industry interests and connections in the public sector as industry ownership, structure, lobbying models, and political relationships have evolved over the past two decades.
   - Conduct targeted research of funding and lobbying concentrated among House and Senate members of committees related to policy-making on related topics or budget and appropriations of related agencies, services, or programs.

4) **More consistent monitoring of industry presence and influence in Federal Agencies and House/Senate Committees**
   - Political influence through economic and lobbying relationships between industry actors and Federal actors or offices tends to focus on elected officials (or officials campaigning for elections). While these areas of focus are essential to understanding the roots of particular kinds and substance of policy-making, a highly understudied area is the lobbying relationships between industry actors and other Federal Agencies including the USDA, EPA, OMB, and USTR.

Lobbying in these terms is not about reelection or satisfying particular constituents, so analysis of influence is likely to take more forms than simply financial contributions.

- Tracking the number of visits by different industry (and civil society) actors during or preceding periods of policy, trade agreement, or Agency specific knowledge production can help understand which interests and potential data sources are being reflected more broadly across and by these Agencies.

5) Grassroots production of indicators

- There is an overall lack of indicators (apart from general calls for reduction) for tracking GHG emissions from agriculture at a local level corresponding to absence of Federal regulation against which standards might be developed. CAFO environmental regulation (and corresponding subsidies) is largely tied to the Clean Water and Clean Air Acts—which provide standards on pollution levels and thresholds. Absent any regulatory or legislative standards related to methane emissions, local and grassroots organizations have an important opportunity to begin developing standards at the state and local levels by which more progressive policy proposals---including but not limited to Green New Deal legislation---may be measured.
- State level analyses using open data to 'follow-the-money' but also to gauge the degree to which climate
- Provided that extreme flooding, fires, and drought have all had a direct impact on smaller and more distributed livestock producers in geographies historically opposed to climate adaptation and mitigation planning; there are new windows for engagement regarding a reality that has had material effects on their lives, livelihoods, and economic interests.[50]

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from PACs and individuals giving $200 or more. All donations took place during the 2017-2018 election cycle and were released by the Federal Election Commission on Friday, February 01, 2019. Numbers compiled through drop down menu for each year. Information aggregated by the Center for Responsive Politics.

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