

The Bottom Line of Trading Livestock: The Money Behind the National Animal Identification System

Backgrounder • July 2009

There are around 2.5 billion farm animals that the United States Department of Agriculture (USDA) wants to track under the proposed National Animal Identification System (NAIS). If and when this tracking system is put in place, it will mean two things:

1. A small number of private interests will make out big financially by supplying hundreds of millions of dollars worth of tracking devices and software to livestock producers.
2. Small producers, unable to cope with the costly technology demands associated with animal tracking, could be forced to give up their farms and ranches — allowing major players like Cargill, Smithfield and Tyson to exercise an even greater control of meat production.^{1,2}

For the time being, the animal tracking program is voluntary, though the USDA has invested more than \$125 million in the last five years³ trying to create the support and infrastructure needed to advance a mandatory NAIS for livestock. In particular, tracking cattle is a high priority for the agency because it is seen as a way to restore international confidence in American beef after the discovery of mad cow disease devastated the industry in 2003. Much of this money has gone toward registering farm premises where livestock are found throughout the United States into a central database, the first step in creating a national animal-tracking program.

In order to advance the NAIS agenda, the USDA agreed in 2005 to begin privatizing parts of the system,⁴ creating another incentive for powerful industry trade groups to support the program. By providing the hardware, software and tracking technology, private industry groups and technology companies have already been able to extract millions of dollars from the proposed NAIS.

NAIS is the product of more than a decade of planning — mostly by the private sector — but only really gained momentum as an animal health measure seven years ago in response to the discovery of mad cow disease in the United States. NAIS continues to be as much the prod-



uct of private industry and the non-profit trade groups that represent it as it is the USDA. Like wolves in sheep's clothing, these trade organizations loudly promote an animal-tracking system as necessary for the meat industry while positioning themselves or their industry partners to possibly reap the windfall revenues that a mandatory animal-tracking program would generate.

The Costs

In April 2009, the USDA released a cost-benefit analysis of NAIS which estimates that a full-traceability animal-tracking system will cost the livestock industry alone \$209 million annually.⁵

The most costly part of NAIS involves Radio Frequency Identification (RFID), which could cost about \$100 mil-

lion for cattle alone.⁶ The preferred method of tagging and tracing cattle, RFID uses tiny radio transmitters about the size of a grain of rice that are either implanted into an animal or into an ear tag that the animal wears. In theory, this technology gives livestock producers and slaughterhouses the ability to quickly “scan” each animal and determine where it came from, which could help trace diseases in the event of an outbreak.

RFID technology is extremely costly for ranchers, but extremely lucrative for private technology providers. Currently only nine RFID manufacturers are recognized by the USDA as approved providers of the devices,⁷ and a handful seem to have emerged as the dominant competitors, vying for the tens of millions of dollars in revenue⁸ that a mandatory NAIS would generate each year.

These RFID providers will likely generate revenue disproportionately from small livestock producers. USDA estimates show that among livestock producers that don't currently tag their beef cattle, the smallest producers — those with fewer than 50 head of cattle — would incur the highest RFID costs as a group, amounting to almost \$35 million dollars a year.⁹ This is approximately how much all other beef cattle producers combined would pay.

For small livestock producers working on tight profit margins, these costs could be devastating. Larger producers have deep pockets and the advantage of economies of scale, allowing them to more easily adjust to the technological requirements of NAIS, a point that the USDA readily acknowledges.¹⁰ The USDA estimates that the RFID costs per head of cattle are somewhere between 30 and 200 percent greater for the smallest producers than the largest producers under a full-traceability NAIS,¹¹ in part because big producers can buy larger quantities of RFID tags at a discount. Some estimates of the high costs small producers will pay are much higher than the USDA's,¹² with numbers surpassing \$40 a head (about five times greater than the USDA estimate) when costs of RFID readers are included.¹³

The costs that livestock producers could incur under NAIS include: buying an RFID tag for each animal, buying an RFID applicator, paying someone to implant the device, buying an RFID reader, buying a computer and paying monthly internet services, creating the necessary infrastructure on a farm to support animal tracking, and providing the time and labor needed to register individual animals in an Animal Tracking Database — which is also a privatized venture, mostly controlled by a small number of corporations and private interests.

The costs and time needed to comply with program requirements would give the largest operations a competitive advantage. This further promotes an unhealthy control of the meat market among a handful of corporations. Ironically, large-scale operators use confinement methods and feeding practices that are viewed by many as increasing the risk of animal diseases that NAIS would track.

Very likely, consumers would have to pay for NAIS through higher meat prices. But unlike government programs like country-of-origin labeling or meat inspections, consumers would receive no day-to-day benefit from NAIS because tracking ends at the slaughterhouse, where most food safety issues originate.

Meanwhile, RFID providers and the private interests that represent them are getting rich — and you might be surprised to learn who is profiting.

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The Players

Consider the Kansas Farm Bureau, a non-profit group that, according to its Web site, “represents grassroots agriculture” and “supports farm families who earn their living in a changing industry.”¹⁴

In carrying out these missions, the bureau has also managed to position itself to be a major beneficiary of the tech-fest that would unfold under mandatory NAIS. The Kansas Farm Bureau aggressively promotes its Beef Verification Solution, an animal-tracking program developed through its Agriculture Solutions division, in conjunction with AgInfoLink,¹⁵ a private tech company¹⁶ that could be one of the leading beneficiaries of a mandatory NAIS. The Beef Verification Solution, according to the Web site, is the “one-stop shop for ISO compliant, USDA approved radio frequency identification (RFID) ear tags, RFID readers and data collection software.”¹⁷

Essentially, by contracting with private tech companies like AgInfoLink and using its members as its customer base, the Kansas Farm Bureau could generate large revenues for both itself and its private-sector partners.

And measured by the support it has received so far, the Kansas Farm Bureau seems to have done pretty well for itself. The Beef Verification Solution has received the endorsement of numerous trade groups and fellow farm bureaus in big cattle-producing states like Colorado,¹⁸ Oklahoma¹⁹ and Nebraska.²⁰ The American Farm Bureau, the parent organization to all the state affiliates,²¹ has endorsed the program, too.²² By 2007, the Kansas Farm Bureau was boasting that the Beef Verification Solution was primed to capitalize on 24 percent of the cattle market.²³

In marketing the Beef Verification Solution, the Kansas Farm Bureau and its partners encourage cattle producers to use other services provided by AgInfoLink,²⁴ one of six companies offering an animal-tracking database that the USDA considers fully functioning and capable of providing traceability.²⁵ In addition to promoting AgInfoLink's CattleCards and BeefLink software,²⁶ the Kansas Farm Bureau apparently also promotes business for the providers of RFID hardware, including the company Allflex.²⁷

Illinois Beef Association (IBA)

In addition to its partnerships with the farm bureaus, AgInfoLink has also partnered with the Illinois Beef Association (IBA),²⁸ a state-level affiliate of the powerful trade group the National Cattlemen's Beef Association (NCBA),²⁹ whose industry partners include corporate meatpackers like Cargill, Smithfield and Tyson.³⁰

From October 2006 to September 2007, during which time the IBA began endorsing AgInfoLink, the organization received \$1.2 million from the beef checkoff,³¹ a government-initiated program that requires every cattle farmer in America to pay one dollar for every slaughtered head of cattle, supposedly to promote beef.³² Most of that money, which amounts to around \$45 million a year,³³ ends up in the hands of the NCBA³⁴ and its affiliates like the IBA.³⁵ It needs to be examined whether the NCBA is using this money in its efforts to promote an animal identification

program, which would stand in contrast to its mission of supporting the interests of ranchers and cattle producers, many of whom may not support animal tracking.

National Cattlemen's Beef Association (NCBA)

The NCBA, which collects around \$45 million dollars a year in beef checkoff money,³⁶ has worked as a major stakeholder in the development of NAIS, hoping that an animal-tracking program would have been in place by 2007.³⁷ In that year, an NCBA affiliate called the National Cattlemen's Foundation³⁸ entered into a cooperative agreement with the USDA³⁹ to help register farm premises — part of a push to expand the NAIS database. Shortly before cooperative agreement was announced, the National Cattlemen's Foundation received more than \$2 million from the USDA.⁴⁰

Back in 2004, the NCBA began working with private technology groups that would benefit financially from NAIS. Called the Beef Information Exchange and apparently comprised of a group of animal-tracking service providers, the group was promoted by one of NCBA's members, Mark Armentrout, who was also the chief operating officer of AgInfoLink Global, Inc.⁴¹

Additionally, the NCBA sits with the American Farm Bureau on the board the United States Animal Identification Organization (USAIO),^{42,43} which has its own NAIS-compliant Animal Tracking Database,⁴⁴ a potentially big money-maker should NAIS become mandatory.

Most of the big names in animal identification have aligned themselves with NCBA, sometimes making cash donations to the organization. Both Allflex USA and Schering-Plough Animal Health (Schering-Plough owns Global Animal Management), two approved technology providers for NAIS, donated \$100,000 to the NCBA to become "Allied Industry Partner" Gold Level Sponsors.⁴⁵



Other technology providers like Destron-Fearing, Y-Tex and AgInfoLink count themselves as allied Industry Council members or associates.⁴⁶

United States Animal Identification Organization (USAIO)

Established to “oversee a database solution for tracking animals”⁴⁷ and built with members from some of the most powerful farm groups, the USAIO seems to have an interest in *controlling* a database for tracking animals — and perhaps benefiting from the huge revenues that would come with it.

Like the National Cattlemen’s Foundation, the USAIO entered into a cooperative agreement with the USDA to register farm premises. Shortly before the agreement was announced, the USDA awarded the USAIO \$1.5 million in taxpayer money.⁴⁸ The group planned to register as many as 100,000 new farm premises under the agreement, the first step toward initiating a fully functional National Animal Identification System.⁴⁹

The USDA has put \$9 million toward these cooperative agreements,⁵⁰ with non-profit organizations^{51,52} that frequently have close ties to industry. As one USDA official said about these organizations, “In many cases, these groups don’t just represent industry, they are industry...”⁵³

Big players like Microsoft may also leverage their financial power and political connections if NAIS becomes a mandatory program. In 2006, the USAIO teamed up with Microsoft and a company called Viatrace to offer what they called an “industry-led, multispecies animal tracking database to record movements of livestock from point of origin to processing.”⁵⁴

One report indicates that USAIO disbanded in 2007,⁵⁵ but the group’s animal-tracking database remains on the current USDA list of approved providers.

Agri Beef

Agri Beef, a vertically integrated cattle operation⁵⁶ that regularly ranks as one of the largest in America,^{57,58} serves as the first point of contact for USAIO’s Animal Tracking Database.⁵⁹ Though the exact relationship between the USAIO, a non-profit group, and Agri Beef, a for-profit meat producer, is unclear, it seems that their animal-tracking database could generate big money for both the groups.

The vice president of Agri Beef is Rick Stott,⁶⁰ listed as one of a handful of members on the USAIO in 2006.⁶¹ He also has served as a member of major industry groups like the NCBA.⁶² And Stott worked on a government-sponsored pilot NAIS project in the Pacific Northwest called the Northwest Pilot Project,⁶³ reportedly worth more than a million dollars.⁶⁴



As the chairman of the project, which was administered by the Idaho Cattlemen Association⁶⁵ (affiliated with the NCBA⁶⁶), Stott was able to help shape and test a pilot NAIS program based on the proposed national system, which he, his employer and his industry friends could benefit from enormously.

But also disconcerting is that Stott, as the head of a pilot project, apparently was overseeing the collection and processing of private data of dozens of other cattle producers participating in the program⁶⁷ — essentially giving him access to proprietary information about his competitors. Big agribusiness groups have pushed the USDA to keep the animal-tracking databases out of government’s hands, claiming that any other arrangement would subject a company’s data to Freedom of Information Act requests or new government regulations.^{68,69} But keeping the database in the hands of big agribusiness — whether with private companies or the trade industries that represent big agribusiness — could force small livestock producers to disclose confidential information about their operations (size of herd, types of animals, etc.) to competitors or the companies they sell to.

The Money Funnel

The financial windfall that has fallen from government to the private sector with NAIS has been mighty, and there seems to be no end in sight. The federal government has already spent more than \$125 million on the development of NAIS,⁷⁰ funneling money into private industries and state governments to promote the animal-tracking program.

Though NAIS is not yet a mandatory program, many technology providers have already benefitted financially in a big way. Global Animal Management⁷¹ and Digital Angel⁷² have both received more than half a million dollars in government contracts for animal tracking devices, while Allflex has raked in close to \$1 million.⁷³

It is important to note that these companies spend money in lobbying efforts around NAIS. The owner of Global Animal Management, a large pharmaceutical corporation called Schering-Plough, plowed millions of dollars a year into lobbying efforts in both 2007 and 2008, some of it on animal identification issues.⁷⁴ Between 2004 and 2007, Digital Angel spent more than a million dollars on lobbying efforts⁷⁵ and Allflex spent an undisclosed amount (under \$10,000)⁷⁶ in 2006, 2007 and 2008.

More disconcerting, it appears that two of these three competitors have partnered, further reducing competition among RFID providers. In 2008, Digital Angel and Global Animal Management (owned by Schering-Plough) announced a deal in which Digital Angel would acquire the rights to Global Animal Management's RFID tag^{77, 78} made by Geissler Technology.⁷⁹

Digital Angel's acquisition of a competitor's RFID-technology could prove to be a wise investment. As part of its 2009 budget, the USDA plans to spend millions of dollars on a campaign directed at the cattle industry called "840 Start Up."⁸⁰ The '840' refers to the United States' three-digit country code that precedes animal identification numbers. The number also refers to the RFID devices that can store and transmit the ID numbers. As more and more farm premises are registered in a national database, the next step in NAIS is to outfit all farm animals with these 840 RFID tags.

And because RFID devices are sold by privately owned companies, the USDA's multi-million dollar "840 Start Up" campaign may really serve to funnel millions of dollars into the bank accounts of the few tech companies that have been approved to sell these products.



Whether it is taxpayers or the farmers themselves who would end up paying for the technology under NAIS, it is clear that it will be the tech companies and the trade organizations they align with that will benefit.

Case Study: Wisconsin

One of the best places to follow the money behind NAIS is Wisconsin, where the Wisconsin Livestock Identification Consortium (WLIC) and its partner group, the Wisconsin Department of Agriculture Trade and Consumer Protection (WDATCP)⁸¹ have managed to secure close to \$7 million in federal funding and more than a million dollars in non-federal funding over the last eight years.^{82,83} Bolstered by a state law requiring every farm premises to be registered in a central database, these groups are serving as administrators of what amounts to a state-level pilot project for NAIS.

The WLIC, a consortium of private industry stakeholders and government agencies, has used these federal tax dollars to fund groups that could benefit financially from NAIS. By the middle of 2005, WLIC reportedly was funding more than a dozen research projects valued at close to \$400,000, with money going to the Wisconsin Pork Association,⁸⁴ which currently sits on the WLIC board of directors, and Smithfield, a current member of WLIC.⁸⁵

WLIC was founded in 2002 as "a proactive, livestock industry-driven effort"⁸⁶ with a mission "to create a secure, nationally compatible livestock identification system."⁸⁷ The members and affiliates of the consortium read like a laundry list of the corporate and private interests that stand to gain from a mandatory NAIS. The big animal-ID tech companies, like AgInfoLink, Digital Angel, Global Animal Management, Y-Text and Allflex USA, are all represented as members.⁸⁸

In coalition with the Wisconsin Department of Trade and Consumer Protection, the WLIC has developed its own USDA-compliant Animal Tracking Database — one of six that the USDA considers fully functional and capable of providing traceability.⁸⁹

The push for animal tracking in Wisconsin, however, has not gone smoothly. Some farmers continue to resist registering their premises or participating in animal identification — either because of privacy or property rights concerns, or, in the case of Amish farmers, on religious grounds.⁹⁰ In 2007, the Wisconsin Department of Agriculture began sending letters to dairy farmers on unregistered premises indicating their milk production licenses could be revoked if they failed to register their farms.⁹¹ This threat, which would have essentially forced non-compliant dairy farmers to go out of business, was eventually softened,⁹² but to critics of NAIS, it demonstrates the heavy-handed tactics that government agencies are willing to use to promote the program.



Case Study: Michigan

The state of Michigan has gone a step farther than Wisconsin, issuing a requirement that every head of cattle in the state must now have an RFID tag, essentially creating a state-wide mandatory animal-tracking system.⁹³ Additionally, Michigan is using an animal-tracking system maintained by Holstein Association USA,⁹⁴ a large non-profit industry group.

Until late spring 2009, the Michigan Department of Agriculture's Web site directed farmers needing to purchase the mandatory RFID tags to Holstein Association USA, which sells tags at \$2 each,⁹⁵ plus a \$20 fee for the applicator,⁹⁶ the tool that attaches the ear tag to the cow. (A recent update to the site now includes another tag provider, but the site still emphasizes Holstein Association USA.) In 2007, the state announced that cattle producers had bought more than one million RFID tags.⁹⁷ That represents at least \$2 million in sales, with the proceeds apparently going to Holstein Association USA and the provider of its tags, a company called Allflex.⁹⁸ In addition to the revenues it may generate from the RFID hardware, Holstein Association USA also serves as the administrator⁹⁹ of Michigan's animal-tracking database,¹⁰⁰ which could provide another source of revenue. In 2007, Holstein Association USA boasted that its animal-tracking database is one of the world's largest, with more than 5 million cows registered.¹⁰¹

When the state of Michigan began requiring all livestock owners to register and tag their farm animals and then directing farmers to a single purchasing option for the animal-tracking hardware and software, the state essentially funneled millions of dollars into the Holstein/Allflex partnership.

(If you diligently scour the Michigan Department of Agriculture's Web site, you find that you can also order RFID tags from Northstar Cooperative,¹⁰² which sells tags from Allflex and one other tech company, Digital Angel.¹⁰³ The USDA has declared nine different RFID-providers as NAIS-compliant, so it is unclear why the state of Michigan would direct its livestock producers to a single provider.¹⁰⁴)

On top of these de facto state subsidies to Holstein Association USA, the federal government has also given the group millions of dollars directly. Holstein Association USA has received more than \$3 million in federal funding between 2000 and 2007 to develop animal-tracking programs.¹⁰⁵

NAIS Failure

If you take a hard look at the money associated with NAIS, you find that the numbers don't add up to a net benefit for consumers or livestock producers. The government has invested \$125 million so far trying to promote NAIS, a program that will cost producers \$200 million a year. These huge sums of money guarantee very little in terms of improved food safety because the tracking ends at slaughterhouses and meatpacking plants where most food safety problems occur. The money the USDA is plowing into NAIS would go far further if it were used instead to bolster existing food safety programs and existing animal health programs that aim to prevent disease.

The costs associated with NAIS threaten to increase the price of meat for consumers and to ruin the businesses of countless small producers, who would bear significantly greater financial pressure relative to larger producers adapting to the technological demands of NAIS. Because NAIS favors large-scale industrialized operations, which have deeper pockets to pay for the necessary technology, and puts financial pressure on small producers, a mandatory NAIS could contribute to a further concentration of the livestock industry among a few corporations.¹⁰⁶

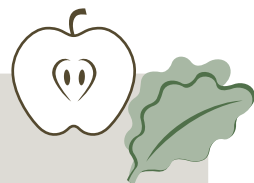
Indeed, the only sure outcome of NAIS are the windfall rewards, which tech companies and the trade groups that support them are currently jockeying to catch. The consortiums they form with private technology providers and federal and state governments are too cozy and too lucrative to give the system an appearance of anything but a cash cow for corporate beneficiaries. The tens of millions of dollars in taxpayer money that has already poured into NAIS has done more to enrich a handful of money-minded organizations than to ensure food safety, and it is time that the USDA jettison this program.

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