



Current state and potential future for livestock grazing and grass-fed/finished markets in Illinois: A qualitative study of stakeholder perspectives

INTRODUCTION

This paper explores the current state of cattle grazing for beef and, to a lesser extent, dairy production in Illinois resulting in grass-fed and grass-finished products that serve markets in and beyond the state. It is a qualitative study utilizing standardized, open-ended interviews with stakeholders directly and indirectly connected with the topic area in Illinois. Findings are summarized by themes identified, named, and categorized by the authors. A discussion on the findings, as well as the limitations of this study and future areas of study, are also included.

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The Wallace Center develops partnerships, pilots new ideas, and advances solutions to strengthen communities through resilient farming and food systems. The Wallace Center falls under the larger, global mission of Winrock International, which is to empower the disadvantaged, increase economic opportunity and sustain natural resources. Specifically, this paper is a product of the Pasture Project which is managed by the Wallace Center's Resilient Agriculture & Ecosystems team. The Pasture Project works to advance scalable solutions for regenerative grazing, agriculture, and land management practices that build healthy soil, viable farms, and resilient communities in the Upper Midwest. More information is available at www.pastureproject.org

BACKGROUND

The Pasture Project has been advancing managed, rotational grazing ("regenerative grazing") and associated agricultural practices (e.g. cover crops, agroforestry, riparian corridor rehabilitation, etc.) in Illinois for the past five years. This involvement has largely taken the form of supporting a cohort of current graziers in the state through technical support, as well as promoting regenerative grazing through broader informational resources and educational events throughout the state. This has resulted in data-backed case studies of Illinois grazing operations as well as an increasing number of relationships with Illinois farmers, graziers, landowners, agriculture educators, agency staff, and others interested and active in transitioning vulnerable acres to incorporate regenerative grazing across the state. This work has been done in partnership with Illinois State office of USDA-NRCS and the Grazing Lands Conservation Initiative in Illinois.

In March 2018, the Pasture Project – in collaboration with American Farmland Trust, The Conservation Fund, and Liberty Prairie Foundation – convened an all-day meeting of 17 stakeholders in Springfield, Illinois to assess the current strengths, weaknesses, opportunities, and challenges to regenerative grazing in Illinois. This strategy meeting revealed a strong, yet uncoordinated interest in advancing regenerative grazing and grass-fed/grass-finished market development in Illinois. Several key points and next steps for advancing shared work were identified:

- Information relating to size and scale of current and potential production, supply chain constraints, and market potential in the state has not been collected and analyzed;
- There is limited shared understanding among stakeholder of current efforts to expand production and reach markets;
- There is no common vision and nor planning amongst interested and engaged stakeholders to overcome barriers;
- There is a need to engage a wider group of stakeholders to develop shared goals for livestock grazing in Illinois and identify shared, priority activities to reach these goals and achieve measurable, sustainable progress;
- On-going strategic convenings and working groups focused on livestock grazing goals and activities would help interested Illinois stakeholders engage and build their involvement in shared efforts.

These limitations – reinforced by a lack of a high-capacity organization or agency dedicated to reintegrating regenerative grazing in the state's agriculture systems – prevent or impede interested stakeholders from building momentum in Illinois, one of the nation's leaders in row crop production. Many participating groups have encouraged the Pasture Project to continue to lead future efforts in the state. This paper and its supporting interviews are a direct result of this stakeholder meeting and is intended to inform and support a stakeholder convening in the Fall 2019.

PURPOSE

This research seeks to address gaps in understanding of current and potential livestock grazing and grass-fed/grass-finished markets – specifically beef and dairy production and products – in Illinois. Given limited quantitative data on regenerative grazing and grass-fed/grass-finished markets in the state, a qualitative assessment based on key stakeholder interviews was a necessary first step to understand the current status and future possibilities. The short-term goal of this paper is to gather and summarize a diversity of perspectives in a format that will inform interested stakeholders. The hope is that informed stakeholders will then be more likely to engage in a strategic planning process for livestock grazing and grass-fed/grass-finished markets in Illinois. The long-term goal of this research is to support the creation of a shared, multi-stakeholder strategy for growing and sustaining livestock grazing and grass-fed/grass-finished markets in Illinois that will unite existing stakeholders and engage new stakeholders as it is implemented over time.

METHODOLOGY

This study pursues this question: based on the current status of livestock grazing practices and grass-fed/finished markets for beef and dairy in Illinois, what are the challenges and opportunities that must be incorporated in efforts to advance these practices and markets in the state?

This study is based on a qualitative approach selected due to the limited availability and quality of quantitative data as well as the identified need for a broad, exploratory approach. A standardized, open-ended interview method was chosen to provide comparison between individuals interviewed, and to allow for the process to be informed through interview dialogue. Individuals interviewed were recruited from a list of established relationships with known

involvement or interest in the Illinois agriculture and livestock sector, bolstered by desktop research on relevant stakeholders and contacts. This list was also improved through suggestions made by preliminary interviewees. Individuals were contacted via e-mail to provide them project information, request an interview and complete online scheduling. Two follow-up efforts were made with non-responsive individuals.

All interviews were completed via telephone by two interviewers using a standardized interview guide and question list. These questions included:

1. How would you describe livestock grazing and grass-fed/grass-finished production in Illinois, currently?
2. Do you see benefits for expanding livestock grazing and grass-fed/grass-finished production in Illinois?
3. From your perspective, what would be the ideal role of livestock grazing and grass-fed/grass-finished production in Illinois agriculture?
4. Who are the Illinois champions of this work currently?
5. What are the current barriers to increasing livestock grazing and grass-fed/grass-finished production in Illinois?
6. What are the current, untapped opportunities to increase grazing in the state?
7. Do you think there is a need to coordinate efforts to expand livestock grazing and grass-fed/grass-finished production in Illinois?
8. What role do you see state and federal policy playing in expanding livestock grazing and grass-fed/grass-finished production in Illinois?

All interviews were recorded with the permission of the interviewee for transcription purposes. A total of 34 individuals were contacted in March 2019 and 24 interviews were completed in April 2019 – a 70% success rate, a response higher than anticipated. Those contacted and those interviewed represented a range of backgrounds and experiences including current producers (commodity row crops and livestock), non-government organizations, state government agencies, federal government agencies, universities, commodity trade associations, and private consultants. An additional 22 individuals have been identified for outreach in a secondary interview round, indicating that the process has not yet reached a saturation point and our information may be improved through this larger sample size. All interview notes were reviewed, summarized, and categorized by open coding using identified themes.

FINDINGS

Themes emerged across all the major questions asked to each interviewee. All themes were identified, named and categorized by the interview team. These themes are not inclusive of all points made during each interview. Rather, themes reflect the most common points made across all interviews and will inform this paper's discussion and conclusion. Themes by question are summarized below:

How would you describe livestock grazing and grass-fed/grass-finished production in Illinois, currently?

Through the interviews it was found that livestock grazing and grass-fed/grass-finished production is a small niche in Illinois, with corn and soybean production dominating the agriculture sector of the state and largely driving presence and development of livestock confinement operations. According to one individual working in the non-profit sector,

...grass fed sector feel to me it feels very niche. So, you know not it's not a huge market but there's kind of a core of passionate advocates and practitioners and it seems like individually they have success.

Row crop dominance and relevant federal Farm Bill support programs have created conditions making livestock grazing and grass-fed/grass-finished production more challenging in Illinois, namely the price of agricultural land for purchase or cash lease. Speaking to this, a current Illinois grazier noted that livestock grazing is,

...definitely secondary to our grain complex in the state. When people talk about farming in the state, they don't talk about beef cattle and certainly not beef cattle grazing.

Despite these challenges, there are good examples of established graziers producing grass-fed/grass-finished producers in the state and that a majority were selling their products via direct-to-consumer markets such as farmers markets, online stores, and farm stands. The state's current graziers focused on grass-fed/grass-finished products are a mix of cow-calf operators, stocker operators, and finishing operations. Interviewees noted that livestock populations were more common in specific regions of



Field Day, Rocky Road Brown Swiss Dairy (Mulberry Grove, IL)

Photo: E. Spratt

the state, namely where higher slope topography made corn and soybean production less profitable. This includes areas closest to major rivers and areas that were unglaciated such as northwest and western Illinois along the Mississippi Rivers as well as southern Illinois.

Demand for grass-fed/grass-finished products in the major metropolitan areas in and around Illinois – specifically Chicago and St. Louis – is well known. Demand for grass-fed beef and dairy in Indianapolis, Louisville, Nashville and Memphis markets is also well understood by Illinois stakeholders. These markets are largely served by a small number of Illinois grass-fed/finished beef and – to a lesser extent – dairy producers via direct market relationships with farmers-market customers, subscription customers, and restaurant buyers. Despite the geographic proximity to St. Louis markets, producers in Southern Illinois, are more connected to Louisville, Nashville and Memphis markets because of interstate accessibility. Demand outside of these metropolitan areas – particularly in from the Quad Cities region

(Eastern Iowa and Northwestern Illinois) and the significant cities of Central Illinois (Peoria, Springfield, Decatur, Quincy, Champaign-Urbana, and Bloomington-Normal) is not obvious or significant.

While not exclusive, livestock grazing and grass-fed/grass-finished production in Illinois is most commonly being adopted by individuals who are entering agriculture as a second career, often post-retirement, or younger generation individuals in established farm families. These groups are often looking for new enterprises for less-productive acres, either currently not farmed or – particularly for younger generation individuals in farming families – that are part of a larger commodity farm operation managed by an older generation family member. Across the board, interviewees pointed to enhanced profitability as a current driver of interest in livestock grazing and grass-fed/grass-finished production as a supplementary enterprise on Illinois farms, significantly encouraged by low-profitability grain prices and reduced access to available global commodity grain markets caused by \ trade disputes.

Do you see benefits for expanding livestock grazing and grass-fed/grass-finished production in the state?

Interviewees overwhelmingly agreed that there were multiple benefits from expanding livestock grazing and grass-fed/grass-finished production in Illinois. Most interviewees cited both economic and environmental benefits. According to a current Illinois farmer,

...in order to make regenerative agricultural work, we need to have a combination of plants and animals on the land together to provide the ecosystem services that's necessary to build soil and produce a healthy crop.

Economic benefits were most commonly cited by producers, though most also cited environmental benefits. According to an interviewee working for an agriculture-focused non-profit organization,

...vertical integration not only helps agriculture as a state...it can also help the individual farms to have multiple income streams.

Many noted that grazing systems focused on grass-fed/grass-finished production were most profitable and impactful on highly-erodible soils in the state's western and southern regions rather than as an immediate replacement for corn and soybean on flatter and thus more profitable acres of the state's central region. Many noted that livestock integration was a fundamental principle of soil health and farm sustainability, which offers a more sustainable alternative to commodity production characterized by expensive inputs and low-price end markets. A University of Illinois Extension educator pointed out,

...there are tremendous benefits to integrating the livestock with cropping with getting perennial cover on the soil. So, whether that's a permanent pasture or some rotation that involves cover crops that get grazed just having those plants on the soil and then the benefit of the life in the manure and the resulting benefits to soil health from that are all tied together and part of the system.

This was seen by many interviewed to be a significant benefit for existing corn and soybean farmers with unstable finances due to unreliable commodity production systems, as well as for new farmers interested in adding a livestock operation to a family

operation or starting their own operation through acquiring, leasing or contract grazing land. Many interviewed noted the aging farmer population, as well as the overall decline of the number of farms, in the state and the impact these trends are having on rural communities. Profitable grazing and grass-fed/grass-finished operations are seen as beneficial for stabilizing and revitalizing the state's farms and rural communities.

Many interviewees, including most of the producers interviewed, also cited the benefits for improved soil health, water quality and climate change adaptation that grazing systems may provide, noting the importance for the future of Illinois agriculture and ecosystems. According to a current Illinois farmer,

...now we have some of the worst erosion this winter that I've ever seen as far as the topsoil and where things like that are concerned. Of course, if we had more permaculture [with] grassland, vineyards or orchards, we might be much more sustainable...or much more environmentally conscious.

These benefits were often explicitly tied to the economic benefits from improved ecosystem services on the farm and community levels. Several also cited the human health benefits of eating grass-based beef and dairy. The latter was often cited as the major driver in increased consumer demand for grass-fed/grass-finished beef and dairy products, as well as a point of pride for producers who felt they were caring for the health of their land, animals, and customers.

From your perspective, what would be the ideal role of livestock grazing and grass-fed/grass-finished production in Illinois agriculture?

Most interviewees had a very practical perspective on how to integrate grazing systems and grass-fed/grass-finished production into a state dominated by corn and soybean production. Several harkened back to the agriculture profile of Illinois in the mid-20th century, noting that the state's farms were highly diverse and included livestock grazing within living memory. These individuals often pointed out that such nostalgia resonated strongly with farmers and rural communities.

Most perspectives on the ideal future state of livestock grazing and grass-fed/grass-finished

production would need to be largely transitional in nature, noting that expanded grazing systems would need to rely on a mix of annual (i.e. cover crop, crop residue, etc.) and perennial forages to be successful in Illinois on both the short and long-term. To this end, several interviewees suggested that – ideally – an efficient means for connecting farmers, graziers, and landowners would exist to help broker long-term contract grazing between those with cattle and those with forage that can be grazed. The goal – as interviewees noted – would be to integrate, to some degree, managed livestock grazing rotations on all Illinois farms to encourage positive soil health disturbances and provide profitable enterprises. A leading Illinois grazer characterizes this as “total dispersion and – from a saturation standpoint – livestock in every [Illinois] county.”

Many noted that an ideal future would be characterized by highly erodible soils in the state being entirely transitioned to perennial pasture or cropping systems with livestock integration (i.e. agroforestry, silviculture, etc.) It was also commonly noted that livestock confinement operations would be

prohibited on acres that were more likely to drain and thus contaminate ground and surface water systems.

Overall, most interviewed shared some vision of Illinois moving away from being one of the largest contributors to recognized national and global challenges connected to agriculture (i.e. water pollution, soil loss, climate change, human health epidemics, etc.) Many envisioned the state becoming known for diversified agriculture that successfully integrated commodity crop production and perennial system through regenerative systems characterized by managed livestock operations that enhanced all crop production. According to a University of Illinois Extension educator,

If they were up to me I'd say almost every farm has some form of [livestock grazing], so the landscape is green and there's animals everywhere... You know there may be some that have a different model but I'm personally and even professionally I would say I'm not someone that thinks animals shouldn't be on fertile soil. I think they should be. I don't I don't think about it as a secondary use. I just think it should be integrated into the system and applied to all soil types and all farms.

Who are the Illinois champions of this work currently?

There are a handful of well-established Illinois producers who are running some type of diversified grazing operation that produces or supports grass-fed/grass-finished production. It is of note that all but one of the six most commonly mentioned producers were included in the preliminary round of interviews for this study. The list included: Trevor Toland, Trent Sanderson, Ted Krauskopf, Jim Burris, Jack Erisman, and Dave Bishop.

Organizations and associated individuals working to support livestock grazing and grass-fed/grass-finished production in Illinois include Cliff Schuette of the Illinois Grazing Land Conservation Initiative, Travis Meteer and Teresa Steckler of University of Illinois Extension, Woody Woodruff of the Illinois Stewardship Alliance, Will Glazik of the IDEA Farm Network, Nathan Aaberg of Liberty Prairie Foundation, Matt Bunger of NRCS-Illinois, and several others. It is important to note that a champion was not identified within the Illinois state government or any other policy-setting or regulatory institution.



Trevor Toland, River Oak Ranch (Macomb, IL) Photo: P. Huff

What are the current barriers to increasing livestock grazing and grass-fed/grass-finished production in Illinois?

Expensive agricultural land and highly competitive cash rents in Illinois are one of the most significant barriers standing in the way of increased livestock grazing and grass-fed/grass-finished production in Illinois. This was most commonly associated with the increasing number of non-operating agricultural landowners in the state and the impact this has on maintaining the dominance of corn and soybean production in the state. Many noted that non-operating landowners can be disconnected from the impact of conventional agriculture practices on the land that they own and overemphasize short term cash rents that go to the highest bidder rather than the best steward. Several interviewees commented that high cash rents combined with higher upfront costs for purchasing cattle, can be prohibitive for new graziers. Further, many interviewees mentioned that the increasing average age of farmers in Illinois also discourages the growth of new or expanded grass-fed/grass-finished production as older farmers are less interested in taking on new enterprises and the subsequent risk at a later stage in their lives.

Interviewees also noted that the state's university systems offering agricultural training often have limited interest or capacity in providing information, training or technical support on regenerative agriculture practices, such as managed rotational livestock grazing or grass-fed/grass-finished production. Again, the dominant focus was highlighted in comments on the limitations of the state's university system and funding available for diversified research. According to a current Illinois corn and soybean farmer adding grazing to their operations,

I went to Illinois State University and felt like I got a good education. And I got an education on the system that was backed and funded by the fertilizer companies that create these chemistries that we use in agriculture today. And there was not a peep spoken about any kind of microbial environment. Nothing.

The same emphasis was placed on a lack of livestock technical service providers and

consultants in the state with a familiarity with integrated agriculture systems that include livestock grazing enterprises.

Illinois has lost critical infrastructure for livestock grazing operations, namely permanent perimeter fencing, livestock water access wells and processing facilities for meat and dairy. The removal of fencing to enable more broadscale corn and soybean production is the most significant loss of “hard infrastructure” and the most significant on-farm barrier to the reintegration of livestock grazing on Illinois farms. What fencing remains on accessible, grazable lands is often in disrepair and upgrades can be cost prohibitive. The infrastructure removed also included natural buffers along field edges and waterways. According to a current Illinois farmer,

My father was born in 1902...he grew up hating hedgerows. He died at age 99. Before he died, he said – and he was one of the guys who took out a lot of the hedgerows – he said, ‘Son, we made a mistake. We should have left those hedgerows in.’

A loss of “soft infrastructure” in the form of animal husbandry, stockmanship, fence construction, and other livestock grazing skills and knowledge has also been lost amongst Illinois farmers. The second most significant loss of “hard infrastructure” is the steady decline of small and medium scale slaughter and processing facilities. Like the loss of fence, the loss of small and medium meat and dairy processors has also triggered a decline in those processors with the “soft infrastructure” knowledge and skills on how to do business with graziers of different scales to profitably process variable numbers of animals in a cost-effective and timely manner. What processing is available in or adjacent to the state can be out of reach for graziers in certain areas of the state. Reaching available facilities carries a significant transportation cost for producers and long waitlists at processing plants can create a further business complication for those interested in beginning or expanding a livestock grazing and grass-fed/finished operation.

Difficulty with producers understanding grass-fed/grass-finished beef and dairy market demand and how they could profitably access different market channels were also frequently cited by interviewees as a significant barrier. These comments were often two-fold: first that producers often are required – regardless of their interest or ability - to be effective marketers to be successful, particularly when accessing the most readily available direct sale grass-

fed/grass-finished markets; and second that grass-fed/grass-finished markets are often hard to identify, understand, and access unless personal relationships are already in place. Comments were also made to the effect that markets were polarized, with more common, yet higher maintenance direct markets best serving small operations and less common, more complex wholesale markets best serving very large operations. No middle market for beef and dairy often cited as a key barrier for operations.

Finally, many interviewees pointed to the entrenched agribusiness model and federal policies that promote and ensure the financial success of conventional commodity production in Illinois (e.g. crop insurance, etc.) Many held the opinion that a large portion of current corn and soybean producers have little incentive to transition to regenerative practices, including the integration of livestock and grass-fed/grass-finished production, because of government assurance programs. Further, it is felt that the influence of agribusinesses and commodity trade associations on farmers and federal policy was noted as a significant barrier, as both either discourage or overlook alternatives to conventional practices contributing to a culture that ostracizes those that move away from that status quo. Interviewees noted that adopting unconventional practices require producers to challenge their assumptions or commonly held beliefs about livestock integration (e.g. requires more time than row crop production, creates soil compaction, etc.) and sometimes additional financial risk. It is felt that farmers are accustomed to a certain pattern of operation and lifestyle that many are not interested in changing, particularly when social and industry pressure is adverse. This challenge also transfers to the farmer's relationship with their financial institutions that provide operating and capital loans, as these institutions are often unfamiliar with non-conventional practices and assign them a high degree of risk that can be prohibitive for transition lending. One interviewee shared a story about a young, yet experienced grazier that relocated to Illinois to start a grazing operation:

I knew he was talking to banks and he was serious, and he was trying to figure it out. But the sad part of the story is he ended up leaving and I think he went to Virginia because it's just a whole lot easier I imagine to do this in Virginia so that I feel like it's a typical story and just illustrates that it is so incredibly difficult to do that here that even when you get somebody who knows how to do it from here they leave because it's just too difficult.

What are the current, untapped opportunities to increase grazing in the state?

Many interviewees pointed to the education of specific audiences on specific topics as opportunities for increasing livestock grazing and grass-fed/grass-finished production in Illinois. Most significantly, interviewees suggested that producers not involved in grazing or grass-fed/grass-finished production needed to be engaged in the practices and how they can be profitably integrated into several different circumstances. The business case for grazing and grass-fed/grass-finished was heavily emphasized as a key piece of expanding practices in the state, as was the need for more peer-to-peer networks for farmers to work together in knowledge building and sharing, both in person and online.

Several interviewees noted that reaching younger generations before they entered university agriculture programs would be helpful in changing the predominant perspective on grazing and grass-fed/grass-finished in the state. Specifically, there were mentions of engaging 4H, Future Farmers of America (FFA), and agriculture vocational teachers in high schools. Additionally, several interviewees suggested outreach to university and extension educators to assess how expanded regenerative grazing and grass-fed/grass-finished production information and resources could be made available to students, producers, and the public through their institutions.

Bankers and financial institution staff that work with farmers were also identified as audiences that could benefit from a deeper understanding on livestock grazing and grass-fed/grass-finished operations and businesses, particularly regarding how to assess associated risk in the loan-making process. Many interviewees noted that financial institutions are often unfamiliar and skeptical of agricultural enterprises that fall outside of conventional production systems, resulting in new or established producers struggling to secure the capital to invest in grazing operations or grass-fed/grass-finished production.

Finally, many interviewees suggested that consumer education was paramount for advancing livestock grazing and grass-fed/grass-finished production in the state, noting that producers will follow consumer preferences for meat and dairy. According to a current Illinois livestock producer,

Local food systems, the more we regionalize or localize food systems – that will be a consumer driven demand. And if we education to that...from nutritionists, from dietitians, from rural sociologists, those kinds of people need to have their voices heard.

Thus, many interviewees suggested a need for a consumer education campaign on the benefits of grass-fed/grass-finished beef and dairy for their health, the viability of the producing farm, and the resiliency of the state.

Interviewees also noted that there were untapped opportunities for graziers to access broader forage chains that include public lands, cover crops, crop residues, and conservation lands in Illinois. Emphasis was placed on grazing cover crops and crop residues throughout the state, as these were forage bases that could be easily and cheaply accessed compared to establishing perennial pasture for both contract and non-contract grazing. Many interviewees pointed to

increasing adoption of cover crops and no-till practices as an opportunity to engage farmers on livestock integration, especially as the economic and soil health benefits of such integration are better understood and documented.

Finally, increasing access to public lands and Conservation Reserve Program (CRP) lands in Illinois for grazing was frequently suggested. Public lands were specified as those managed by state and federal agencies such as the Illinois Department of Natural Resources and the U.S. Fish and Wildlife Service. Several interviewees suggested following models for public land grazing in other Upper Midwest states, notably the efforts of the Pasture Project and other partners with the Wisconsin Department of Natural Resources. Many interviewees suggested lands coming out of the USDA CRP program should be targeted for introduced grazing to ensure they remain in perennial cover.



New Pasture Soil Sampling, Beasley Family Farms (Creal Springs, IL)

Photo: E. Spratt

Do you think there is a need to coordinate efforts to expand livestock grazing and grass-fed/grass-finished production in Illinois?

Without exception, all interviewees strongly agreed that there was an urgent and timely need to coordinate efforts across various Illinois stakeholders regarding efforts to expand livestock grazing and grass-fed/grass-finished production in Illinois. Most note that the limited efforts in this regard were largely silos and fragmented, resulting in ineffective or conflictual messaging to producers, landowners, and the public. According to an agriculture-focused nonprofit staff member,

there's a lack of serious and significant lack of capacity around grass fed beef rotational grazing in particular as a production model...I think there needs to be a coordinated and energetic voice to make any progress that's helpful.

In general, interviewees placed a high value on developing peer-to-peer engagement forums and tools for sharing information, collaborating on shared activities, and measuring collective impact. There is no one clear voice speaking for regenerative grazing and grass-fed/grass-finished in Illinois – a role that many called on the Wallace Center's Pasture Project to provide on the short term in order to encourage Illinois-based groups to be this voice on the long term. According to a current Illinois farmer,

We need everybody in this discussion. If we're going to make progress, we need universities for the research we need the ability of NGOs goes to put together meetings. We need people who are able to talk with our representatives and senators and both nationally and in state level. We need a partnership. Nobody is going to be able to do it all by themselves.

Such a unified voice is felt key to coordinating interested stakeholders, responding to interested producers or landowners, and developing resources like Farm Bureau. They also saw this as critical because of what was characterized as a steady decline in technical support from the University of Illinois-Extension, USDA NRCS, and soil and water conservation districts across Illinois. Finally, many interviewees suggested that a coordinated effort could also engage and guide university research priorities

as well as state policy advocacy in support of regenerative grazing and grass-fed/grass-finished production.

What role do you see state and federal policy playing in expanding livestock grazing and grass-fed/grass-finished production in Illinois?

There were mixed perspectives from interviewees regarding the role of state and federal policies and programs. Many farmers did not support an expanded role for state and federal government in expanding livestock grazing and grass-fed/finished production in Illinois – often citing negative experiences or perceptions of government bodies and agencies. Many supported improvements to current state and federal agriculture programs, as well as more direct support for producer and consumer education on the benefits of regenerative agriculture and the resulting products. According to one well established Illinois farmer,

I don't think [state and federal government agencies] need to play any [role]...concentrate on the market itself. If you're going to pour money into a system, I'd pour money into education and research - give it the bottom-up approach!

Those that saw role for government policy in expanding livestock grazing and grass-fed/finished production in Illinois focused on suggestions regarding cost-share programs, technical assistance, financial incentives, and outreach to non-farming populations. According to a current Illinois farmer,

The Farm Bill could further this enormously simply by creating incentives for doing it. And one incentive that we talk about is crop insurance. If I have a diverse farm if I have animals and plants if I have many things to market I am taking steps to reduce risk. The risk of catastrophic failure is no different than the guy who puts the sprinkler system in his building reduces the risk of fire and therefore should be able to buy his insurance cheaper. So, if I am taking steps to reduce my risk I should be able to get my crop insurance at a lower price than somebody who isn't taking steps to reduce risk.

Regarding cost-share programs, most interviewees spoke most commonly of the Environmental Quality

Incentives Program (EQIP). Again, perspectives were mixed with some feeling that EQIP was a good program for certain applications and others feeling that the program was too time-intensive and rigid in its required specifications for grazing practices. Most felt that EQIP could be improved and streamlined. There was more agreement between interviewees that the right role for government programs is in providing access to free technical assistance in transitioning to or improving livestock grazing operations focused on grass-fed/grass-finished production.

There was also more agreement that state and federal policymakers could most effectively support expanded grazing and grass-fed/grass-finished production in Illinois by creating tax incentives for beginning graziers, increased cover crop adoption, intensified grazing rotations, integrated regenerative practices, and long-term leases for both producers and landowners. Regarding the latter, many interviewees also suggested that the Illinois state government and associated agencies could help with outreach to non-operating landowners through a state campaign to build awareness of good rental practices to support regenerative agriculture, including long-term leases for both public and private land. Overall, most interviewees were wary of regulatory interventions – preferring incentives – but were keenly aware that the former might be inevitable to address certain issues such as water quality.

DISCUSSION, LIMITATIONS & NEXT STEPS

Overall, the efforts of the interview team were successful in reaching a significant number of stakeholders associated with Illinois agriculture and livestock production. This included current producers (commodity row crops and livestock), non-government organizations, state government agencies, federal government agencies, universities, commodity trade associations, and private consultants. Significant themes emerged across all interviews based on the standardized question list. Broadly, it was clear that livestock grazing and grass-fed/grass-finished production was a small niche of Illinois agriculture, largely overshadowed by the large corn and soybean production. However, successful livestock grazing operations producing profitable grass-fed/finished beef and dairy do exist in Illinois and can serve as models for further growth of similar production and supporting markets. Regenerative grazing is viewed as a win-win-win for Illinois farmers, rural communities, consumers, and ecosystems. Further, there is a shared vision for how livestock can be integrated into diversified Illinois farms, value

chains, and end markets on multiple scales. However, there are numerous barriers that were identified – namely in education, infrastructure reestablishment, and market development. There were also numerous opportunities that stakeholders identified, namely expanded outreach and education to broader stakeholders, enhanced grazing cover crop practices, and broader strategic planning with both public and private audiences.

This study was limited by the bias of the interview team, for which efforts to mitigate influence were made to ensure interviewee perspectives were accurately conveyed. However, bias remains. Further, the study was also limited by the number of interviews and limited time for analysis. To correct for this, the interview team plans to expand future interviews and complete more in-depth analysis.

Next steps from this study include gathering study feedback from interviewees, conducting additional interviews, expanding analysis for a revised white paper, and supporting interviewees to convene at an in-person strategy session on expanding Illinois grazing and grass-fed/grass-finished production.