

Tennessee Market Highlights

UT EXTENSION
INSTITUTE OF AGRICULTURE
THE UNIVERSITY OF TENNESSEE

January 24, 2025

Number: 4

Trends for the Week Compared to a Week Ago

Slaughter Cows

\$4 to \$7 higher

Slaughter Bulls

\$3 to \$6 higher

Feeder Steers

unevenly steady

Feeder Heifers

\$3 to \$5 higher

Feeder Cattle Index: 277.55

Fed Cattle

The 5-area live price on Thursday of \$204.14 up \$0.58 compared to last week and \$322.15 dressed, up \$0.66.

Corn

March closed at \$4.86 a bushel, up 2 cents since last Friday.

Soybeans

March closed at \$10.55 a bushel, up 21 cents since last Friday.

Wheat

March closed at \$5.44 a bushel, up 6 cents since last Friday.

Cotton

March closed at 67.61 cents per lb, up 0.01 cents since last Friday.

Livestock Comments by Dr. Andrew P. Griffith

FED CATTLE: Fed cattle traded steady to \$1 higher on a live basis compared to last week. Prices were mainly \$201 to \$210 on a live basis. Dressed trade was mainly \$322 to \$325.

The 5-area weighted average prices thru Thursday were \$204.14 live, up \$0.58 compared to last week and \$322.15 dressed, up \$0.66 from a week ago. A year ago, prices were \$175.39 live and \$276.87 dressed.

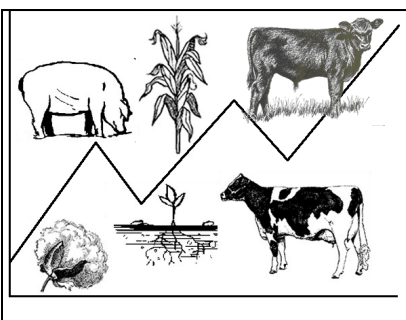
There was a wide range of prices for finished cattle this week with marked differences between the South and the North. Some cattle in the North traded as high as \$210 to \$212 on a live basis and \$328 to \$330 on a dressed basis while prices in the Deep South were closer to \$201. It would appear there was a strong preference for better grading cattle, but this notion is not fully supported by a widening of the Choice Select spread when it comes to boxed beef prices. Thus, in some instances, cattle prices in the North were actually \$6 to \$8 higher on a dressed basis when compared to the previous week, which is tough on the packer when they are paying more for cattle and receiving less from the carcass.

BEEF CUTOUT: At midday Friday, the Choice cutout was \$328.77 down \$2.19 from Thursday and down \$5.05 from a week ago. The Select cutout was \$316.13 down \$1.08 from Thursday and down \$5.32 from a week ago. The Choice Select spread was \$12.64 compared to \$12.37 a week ago.

Eleven months of 2024 beef and veal trade data has been finalized. This data reveals strong international demand for beef produced in the United States of America. Based on this data, beef and veal export quantity from January through November 2024 is 1.4 percent lower than the same months the previous year. However,

the value of these exports increased 5.6 percent compared to the same time period in 2023. The fact beef and veal exports declined such a small amount amid increasing beef prices is a testimony for strong demand for domestically produced beef. Will this trend persist moving through 2025? The verdict is still out, but there should not be tremendous concern on this topic at this time. The unknowns are largely associated with how President Trump and his team approach trade the second time around. President Trump's first term focused on trade with China, and beef trade to China did not pick up until 2020, but it has flourished since that time. Thus, sometimes the focus is a longer-term perspective than the immediate returns of a short run approach.

OUTLOOK: Based on Tennessee weekly auction average prices, steer prices were unevenly steady this week compared to last week while heifer prices were \$3 to \$5 higher than the prior week. Slaughter cow prices were \$4 to \$7 higher than the previous week while slaughter bull prices were \$3 to \$6 higher than last week's prices. As if on cue, the slaughter cow market is beginning to gain steam to start the year. Some of the largest price advances on this class of animal will occur the next couple of months, but the price of slaughter cows will continue to grind higher into June and July. It is difficult to determine at this point if prices can move even higher in late summer, but slaughter cow prices will certainly remain strong through the latter portion of the summer months. On the calf side of the ticket, auction markets continue to trade calves at strong values. The one aspect of the market to keep a close eye on is the price of heifers relative to steers, but observing prices has to be in tandem with quality of heifers. Thus, the price gap between the higher quality heif-



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Livestock Comments by Dr. Andrew Griffith

(Continued from page 1)

er and steers will narrow if cattle producers decide to start rebuilding the cattle herd. If one is simply observing weekly weighted average prices then heifers may be discounted more relative to steers when heifer retention takes place. This would occur because cow-calf producers are keeping a larger percentage of their “best” heifers, which means the quality of heifers being sold through the auction market may decline. Steer prices are not expected to suffer in any form or fashion as the reduced quantity of available cattle to go on feed should keep market prices supported. From a specific price standpoint, 550 pound steers in Tennessee are close to \$315 per hundredweight or \$1,732 per head while similar weight heifer prices are near \$270 per hundredweight or \$1,485 per head. The \$45 per hundredweight price difference in weekly auction averages appears large, but the price difference between top end heifers and steers may be closer to \$20 or \$30 per hundredweight.

The January cattle on feed report for feedlots with a 1000 head or more capacity indicated cattle and calves on feed as of January 1, 2025 totaled 11.82 million head, down 0.9% compared to a year ago, with the pre-report estimate average expecting a decrease of 0.3%. December placements in feedlots totaled 1.64 million head, down 3.3% from a year ago with the pre-report estimate average expecting placements up 1.1%. December marketing’s totaled 1.74 million head up 1.0% from 2023 with pre-report estimates expecting marketings up 1.2%. Placements on feed by weight: under 700 pounds down 8.3%, 700 to 899 pounds up 0.6%, 900 pounds and over up 5.1%.

ASK ANDREW, TN THINK TANK: I have received a couple of question concerning price risk management this week. One was a general question while the other was more specific. The use of price risk management may not be for every producer, but it is beneficial to understand how price risk management tools such as feeder cattle futures and Livestock Risk Protection insurance (LRP) work. The benefit of knowing how such tools work is simply being able to use them at a moment’s notice if the situation arrives. Not knowing how they work makes it more difficult to use such tools when needed. There are certainly some that think there is no use for futures, options, and LRP, and given their production model, they may be correct for their operation. However, there are several different production models and these tools can be beneficial in certain situations. These tools may have even more value during periods of strong market prices as the higher investment in animals or higher value of animals places more capital at risk.

FRIDAY’S FUTURES MARKET CLOSING PRICES: Friday’s closing prices were as follows: Live/fed cattle –February \$204.78 +3.68; April \$203.03 +2.30; June \$197.38 +1.68; Feeder cattle –January \$278.70 +1.63; March \$276.58 +2.50; April \$275.45 +3.00; May \$273.40 +2.93; March corn closed at \$4.87 down 3 cents from Thursday.

Please use this link for cattle and market definitions: [Cattle and Beef Market Definitions Publication W801](#)

Crop Comments by Dr. Aaron Smith

Overview

Corn, soybeans, cotton, and wheat were up for the week.

Nearby soybean futures have risen from the December 17th low of \$9.66, closing January 24th at \$10.55. Moving forward there are four key factors that will determine if (and how dramatically) soybean futures prices will continue to strengthen or if prices will reverse and decline.

	Previous	Current	Change
USD Index	109.21	107.25	-1.96
Crude Oil	77.83	74.71	-3.12
DJIA	43,532	44,360	828

1. Exports. For the 2024/25 marketing year, USDA projects that 43.1% of U.S. soybean production will be exported to foreign markets. Since 2006, on average 46% of U.S. soybean production is sent to foreign markets. Export sales have been strong, exceeding the 5-average pace, however the South American soybean crop will soon provide substantial competition.
2. South American Production and Global Ending Stocks. Brazil is projected to produce another record soybean crop, 6.2 billion bushels. This would be double the amount of soybeans Brazil produced in 2012/13. Argentina is projected to produce 1.9 billion bushels of soybeans this year. There is more uncertainty in the Argentine crop than Brazil, but both have the potential to be very large harvests. If USDA projections are accurate, world soybean production will exceed demand for the third consecutive year and global ending stocks will swell to 4.7 billion bushels.
3. U.S. Planted Acres. Currently, the futures market has a price bias towards U.S. farmers planting corn over soybeans. The November soybean-to-December corn futures price ratio is 2.27, which favors a reduction of soybean planted acres to the benefit of corn.

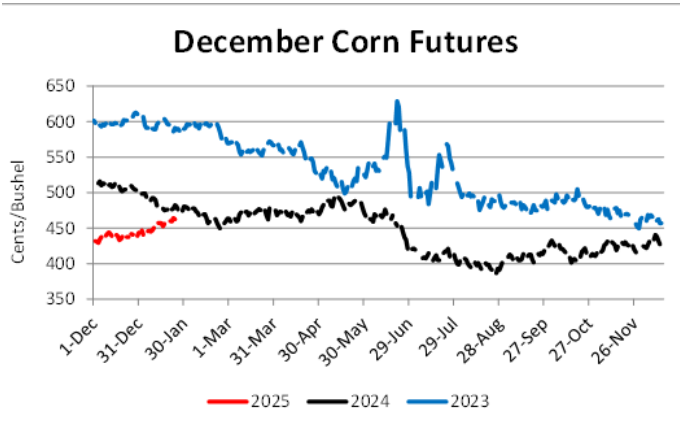
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4. Trade Policy and Tariffs/Retaliatory Tariffs. During the 2018 U.S.-China trade war nearby soybean futures prices dropped from \$10.75 to \$8.26 in four months. Given the uncertainty in trade relations with China and the potential for dramatic price swings purchasing an out of the money put option on unpriced soybeans in storage should be strongly considered. A \$10.00 May put option could be purchased for 12 cents setting \$9.88 futures floor. Reasonably cheap protection, considering the potential catastrophic drop in prices a new trade war with China could trigger.

Corn

Across Tennessee, average corn basis (cash price-nearby futures price) strengthened or remained unchanged at West, Northwest, West-Central, North-Central and Mississippi River elevators and barge points. Overall, basis for the week ranged from 20 under to 23 over, with an average of 9 over the March futures at elevators and barge points. Ethanol production for the week ending January 17 was 1.099 million barrels per day, up 4,000 compared to the previous week. Ethanol stocks were 25.874 million barrels, up 0.86 million barrels compared to last week. Corn net sales reported by exporters for January 10-16 were net sales of 65.4 million bushels for the 2024/25 marketing year and 0.4 million bushels for the 2025/26 marketing year. Exports for the same period were up 2% compared to last week at 59.7 million bushels – a marketing year high. Corn export sales and commitments were 67% of the USDA estimated total annual exports for the 2024/25 marketing year (September 1 to August 31) compared to the previous 5-year average of 63%. Cash prices ranged from \$4.46 to \$5.16 at elevators and barge points. March 2025 corn futures closed at \$4.86, up 2 cents since last Friday. For the week, March 2025 corn futures traded between \$4.80 and \$4.94. May 2025 corn futures closed at \$4.96, up 3 cents since last Friday.

Corn	Mar 25	Change	Dec 25	Change
Price	\$4.86	\$0.02	\$4.61	\$0.05
Support	\$4.80	\$0.11	\$4.57	\$0.11
Resistance	\$4.92	-\$0.16	\$4.67	\$0.02
20 Day MA	\$4.68	\$0.09	\$4.50	\$0.05
50 Day MA	\$4.50	\$0.04	\$4.42	\$0.01
100 Day MA	\$4.40	\$0.03	\$4.44	\$0.01
4-Week High	\$4.94	\$0.09	\$4.65	\$0.06
4-Week Low	\$4.48	\$0.13	\$4.37	\$0.06
Technical Trend	Up	=	Up	=



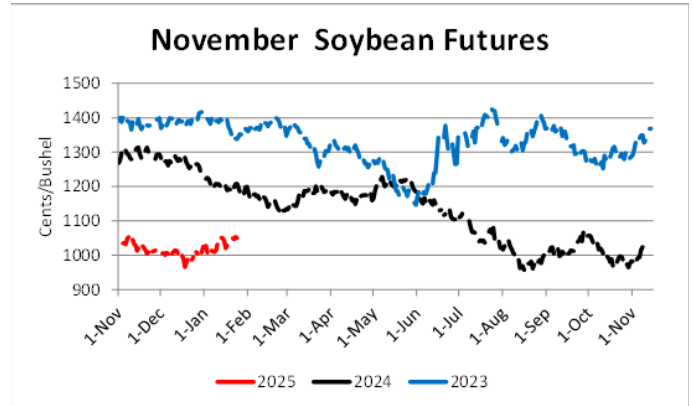
Mar/May and Mar/Dec future spreads were 10 and -25 cents. December 2025 corn futures closed at \$4.61, up 5 cents since last Friday. Downside price protection could be obtained by purchasing a \$4.70 December 2025 Put Option costing 43 cents establishing a \$4.27 futures floor.

Soybeans

Across Tennessee the average soybean basis strengthened or remained unchanged at West, Northwest, North-Central, and West-Central elevators and barge points and weakened at Mississippi River elevators and barge points. Basis ranged from 19 under to 30 over the March futures contract, with an average basis at the end of the week of 12 over. Soybean net weekly sales reported by exporters were net sales of 54.8 million bushels for the 2024/25 marketing year and 0.03 million bushels for the 2025/26 marketing year. Exports for the same period were down 30% compared to last week at 38.0 million bushels. Soybean export sales and commitments were 85% of the USDA estimated total annual exports for the 2024/25 marketing year (September 1 to August 31), compared to the previous 5-year average of 83%. Cash soybean prices at elevators and barge points ranged from \$10.09 to \$10.98. March 2025 soybean futures closed at \$10.55, up 21 cents since last Friday. For the week, March 2025 soybean futures traded between \$10.39 and \$10.76. March soybean-to-corn price ratio was 2.20 at the end of the week. May 2025 soybean futures closed at \$10.68, up 24 cents since last Friday.

Crop Comments by Dr. Aaron Smith

Soybeans	Mar 25	Change	Nov 25	Change
Price	\$10.55	\$0.21	\$10.48	\$0.21
Support	\$10.38	\$0.36	\$10.36	\$0.29
Resistance	\$10.71	\$0.20	\$10.57	\$0.12
20 Day MA	\$10.22	\$0.17	\$10.27	\$0.13
50 Day MA	\$10.05	\$0.02	\$10.14	\$0.00
100 Day MA	\$10.22	\$0.02	\$10.35	\$0.01
4-Week High	\$10.76	\$0.12	\$10.61	\$0.54
4-Week Low	\$9.81	\$0.34	\$9.93	\$0.32
Technical Trend	Up	=	Up	=

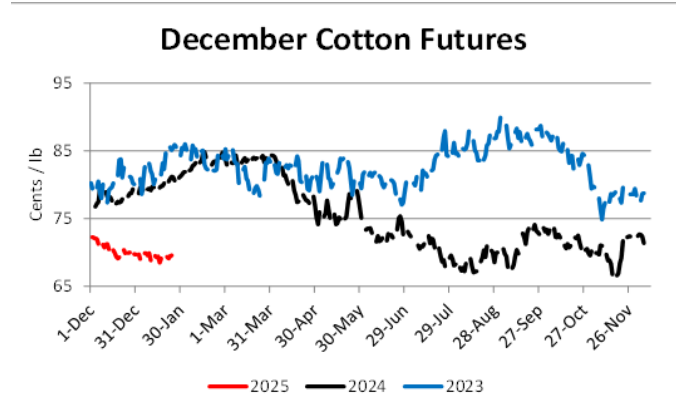


Mar/May and Mar/Nov future spreads were 13 and -7 cents. November 2025 soybean futures closed at \$10.48, up 21 cents since last Friday. Downside price protection could be achieved by purchasing a \$10.60 November 2025 Put Option which would cost 70 cents and set a \$9.90 futures floor. Nov/Dec 2025 soybean-to-corn price ratio was 2.27 at the end of the week.

Cotton

North Delta upland cotton spot price quotes for January 23 were 64.97 cents/lb (41-4-34) and 66.97 cents/lb (31-3-35). Adjusted World Price (AWP) decreased 0.27 cents to 53.71 cents. Cotton net weekly sales reported by exporters were net sales of 348,900 bales for the 2024/25 marketing year – a marketing year high – and 79,800 bales for the 2025/26 marketing year. Exports for the same period were down 1% compared to last week at 222,600 bales. Upland cotton export sales were 82% of the USDA estimated total annual exports for the 2024/25 marketing year (August 1 to July 31), compared to the previous 5-year average of 84%. March 2025 cotton futures closed at 67.61 cents, up 0.01 cents since last Friday. For the week, March 2025 cotton futures traded between 66.76 and 68.44 cents. May 2025 cotton futures closed at 68.67 cents, up 0.04 cents since last Friday.

Cotton	Mar 25	Change	Dec 25	Change
Price	67.61	0.01	69.50	0.38
Support	66.86	1.00	69.01	1.13
Resistance	68.82	0.62	70.31	0.53
20 Day MA	67.94	-0.22	69.49	-0.06
50 Day MA	69.23	-0.42	70.48	-0.29
100 Day MA	71.27	-0.15	71.55	-0.07
4-Week High	69.44	-0.42	70.44	-0.21
4-Week Low	66.60	0.00	68.51	0.00
Technical Trend	Down	=	Down	=



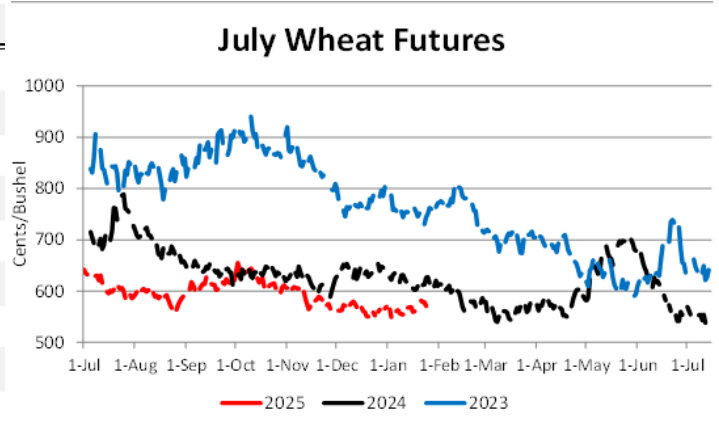
Mar/May and Mar/Dec cotton futures spreads were 1.06 cents and 1.89 cents. December 2025 cotton futures closed at 69.5 cents, up 0.38 cents since last Friday. Downside price protection could be obtained by purchasing a 70 cent December 2025 Put Option costing 4.43 cents establishing a 65.57 cent futures floor.

Wheat

Wheat net weekly sales reported by exporters were net sales of 6.1 million bushels for the 2024/25 marketing year and 1.9 million bushels for the 2025/26 marketing year. Exports for the same period were up 2% compared to last week at 7.4 million bushels. Wheat export sales were 77% of the USDA estimated total annual exports for the 2024/25 marketing year (June 1 to May 31), compared to the previous 5-year average of 87%. Wheat cash prices at elevators and barge points ranged from \$5.14 to \$5.44. March 2025 wheat futures closed at \$5.44, up 6 cents since last Friday. The March wheat-to-corn price ratio was 1.12. March 2025 wheat futures traded between \$5.41 and \$5.66 this week. May 2025 wheat futures closed at \$5.58, up 8 cents since last Friday.

Crop Comments by Dr. Aaron Smith

Wheat	Mar 25	Change	Jul 25	Change
Price	\$5.44	\$0.06	\$5.70	\$0.10
Support	\$5.34	\$0.04	\$5.62	\$0.10
Resistance	\$5.56	\$0.06	\$5.80	\$0.08
20 Day MA	\$5.43	\$0.03	\$5.64	\$0.04
50 Day MA	\$5.49	-\$0.03	\$5.67	-\$0.03
100 Day MA	\$5.74	-\$0.01	\$5.92	\$0.00
4-Week High	\$5.66	\$0.12	\$5.89	\$0.16
4-Week Low	\$5.26	\$0.00	\$5.47	\$0.00
Technical Trend	Up	+	Up	=



Mar/May and Mar/Jul future spreads were 14 and 26 cents. July cash contracts at elevators and barge points ranged from \$5.14 to \$5.49. July 2025 wheat futures closed at \$5.70, up 10 cents since last Friday. Downside price protection could be obtained by purchasing a \$5.80 July 2025 Put Option costing 50 cents establishing a \$5.30 futures floor.

Additional Information:

Links for data presented:

U.S. Export Sales - <https://apps.fas.usda.gov/export-sales/esrd1.html>

USDA FAS: Weekly Export Performance Indicator – <https://apps.fas.usda.gov/esrquery/esrpi.aspx>

EIA: Weekly ethanol Plant Production - https://www.eia.gov/dnav/pet/pet_pnp_wprode_s1_w.htm

EIA: Weekly Supply Estimates - https://www.eia.gov/dnav/pet/pet_sum_sndw_a_EPOOXE_sae_mdbl_w.htm

Upland Cotton Reports - <https://www.fsa.usda.gov/FSA/epasReports?area=home&subject=ecpa&topic=fta-uc>

Tennessee Crop Progress - https://www.nass.usda.gov/Statistics_by_State/Tennessee/Publications/Crop_Progress_&_Condition/

U.S. Crop Progress - <http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1048>

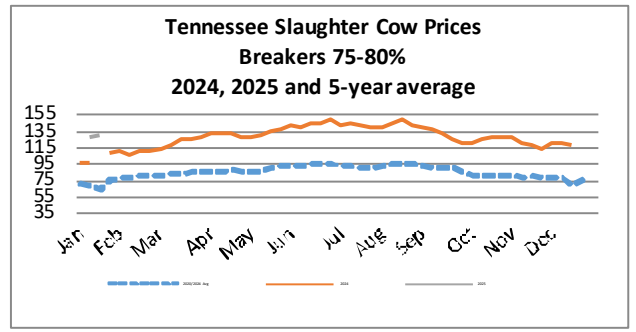
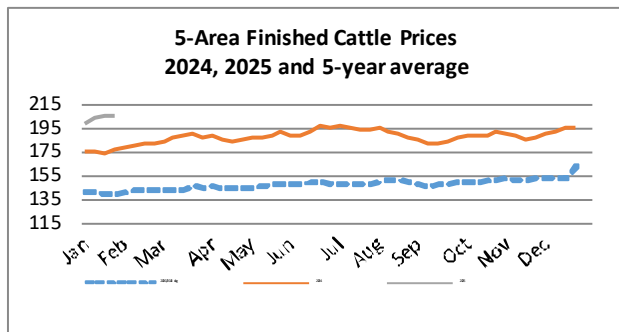
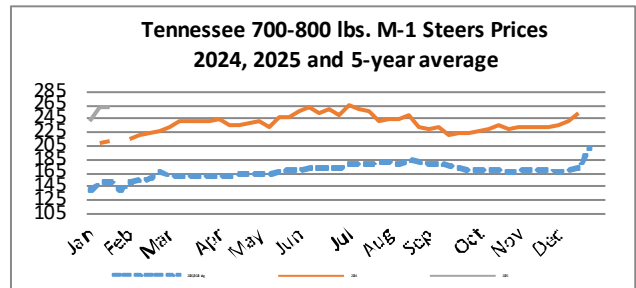
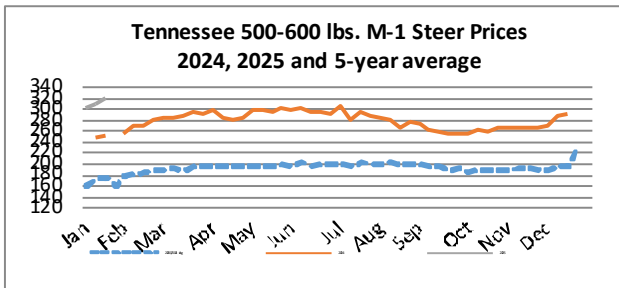
USDA AMS: Market News - <https://www.ams.usda.gov/market-news/search-market-news>

If you would like further information or clarification on topics discussed in the crop comments section or would like to be added to our free email list please contact me at aaron.smith@utk.edu.

Prices Paid to Farmers by Elevators

Friday, January 17, 2025---Thursday, January 23, 2025

	Friday Average	Monday Average	Tuesday Average	Wednesday Average	Thursday Average
No. 2 Yellow Soybeans	-----\$/bushel-----				
Northwest	10.11		10.48	10.37	
North Central	10.44		10.77	10.66	
West Central	10.49		10.82	10.71	
West	10.64		10.97	10.86	
Mississippi River	10.59		10.92	10.79	
Yellow Corn					
Northwest	4.87		4.95	4.89	
North Central	4.64		4.70	4.64	
West Central	5.04		5.10	5.04	
West	5.07		5.13	5.07	
Mississippi River	5.02		5.08	5.02	
Wheat					
Northwest	4.99		5.19	5.14	
North Central	5.24		5.44	5.24	
Mississippi River	5.19		5.39	5.34	
Cotton	-----\$/pound-----				
Memphis	65.10-67.10		65.16-67.16	64.64-66.64	64.97-66.97



Futures Settlement Prices: Crops & Livestock

- Corn: <https://www.cmegroup.com/trading/agricultural/grain-and-oilseed/corn.html>
- Soybeans: <https://www.cmegroup.com/trading/agricultural/grain-and-oilseed/soybean.html>
- Wheat: <https://www.cmegroup.com/trading/agricultural/grain-and-oilseed/wheat.html>
- Soybean Meal: <https://www.cmegroup.com/trading/agricultural/grain-and-oilseed/soybean-meal.html>
- Cotton: <https://www.theice.com/products/254/Cotton-No-2-Futures/data?marketId=5352193>
- Live Cattle: <https://www.cmegroup.com/trading/agricultural/livestock/live-cattle.html>
- Feeder Cattle: <https://www.cmegroup.com/trading/agricultural/livestock/feeder-cattle.html>
- Lean Hogs: <https://www.cmegroup.com/trading/agricultural/livestock/lean-hogs.html>
- Class III Milk: <https://www.cmegroup.com/trading/agricultural/dairy/class-iii-milk.html>

Prices on Tennessee Reported Livestock Auctions for the week ending Tuesday, January 21, 2025

	This Week			Last Week's	Year Ago
	Low	High	Weighted Average	Weighted Average	Weighted Average
-----\$/cwt-----					
Steers: Medium/Large Frame #1-2					
300-400 lbs	340.00	415.00	381.01	370.11	
400-500 lbs	300.00	401.00	349.49	332.20	
500-600 lbs	272.00	337.00	316.28	307.64	
600-700 lbs	247.50	308.00	280.55	283.92	
700-800 lbs	225.00	277.00	258.92	259.48	
Steers: Small Frame #1-2					
300-400 lbs	---	---	---	---	
400-500 lbs	---	---	---	297.50	
500-600 lbs	---	---	---	---	
600-700 lbs	---	---	---	---	
Steers: Medium/Large Frame #3					
300-400 lbs	300.00	385.00	346.47	329.45	
400-500 lbs	252.50	365.00	312.54	297.05	
500-600 lbs	250.00	298.00	277.65	292.57	
600-700 lbs	210.00	290.00	248.82	254.83	
700-800 lbs	217.50	258.00	237.19	245.82	
Holstein Steers					
300-400 lbs	---	---	---	---	
500-600 lbs	---	---	---	---	
700-800 lbs	---	---	---	---	
Slaughter Cows & Bulls					
Breakers 75-80%	113.50	144.00	130.95	128.46	
Boners 80-85%	115.00	143.00	129.42	127.68	
Lean 85-90%	96.00	127.00	113.84	111.74	
Bulls YG 1	135.00	177.00	157.43	153.33	
Heifers: Medium/Large Frame #1-2					
300-400 lbs	272.50	360.00	319.52	318.18	
400-500 lbs	255.00	345.00	294.97	289.24	
500-600 lbs	237.50	295.00	269.76	263.92	
600-700 lbs	225.00	260.00	245.08	238.88	
Heifers: Small Frame #1-2					
300-400 lbs	---	---	---	---	
400-500 lbs	210.00	285.00	248.67	234.56	
500-600 lbs	200.00	241.00	227.49	230.50	
600-700 lbs	---	---	---	---	
Heifers: Medium/Large Frame #2-3					
300-400 lbs	220.00	335.00	290.04	286.49	
400-500 lbs	239.00	312.50	275.31	265.14	
500-600 lbs	223.00	278.00	250.31	246.82	
600-700 lbs	190.00	240.00	226.71	226.27	

Cattle Receipts

This week:9,927

Week ago:5,380

Year ago:

Link to report: https://www.ams.usda.gov/mnreports/ams_2063.pdf

Graded Sales, Video Board Sales, Video Sales & Loads

East Tennessee Livestock Center Graded Holstein Steer Sale - Sweetwater, TN

Weighted Average Report for 1/17/25

For complete report:

https://www.ams.usda.gov/mnreports/ams_2072.pdf

Dickson Regional Livestock Center - Dickson, TN

1/20/25

59 Steers, 842 lbs, M&L #1, 100% Black/BWF, 5 flesh, value added \$265.25

92 Steers. 584 lbs, M&L #1, Mixed Colors (50 Blk/BWF), 4 flesh, value added \$321.00

70 Steers, 722 lbs, M&L #1, 51 Blk/BWF, 10 Red, 9 CharX, 5 flesh, value added \$275.00

80 Steers, 661 lbs, M&L #1-2, Mixed Colors (36 Blk/BWF), 5 flesh, value added, \$290.00

68 Heifers, 738 lbs, M&L #1, Mixed Colors (37 Blk/BWF), 5 flesh, guaranteed open, value added, \$247.50

Columbia Livestock Center (UPI) - Columbia TN

1/22/25

1 load of 61 Steers, 803 lbs, M/L, 1's, 5 Fleshed, 100% Blk/BWF, All were home raised and weaned 120+ days with 2 rounds of vaccinations, \$271.50

1 load of 57 Steers, 904 lbs, M/L, 1's, 5 Fleshed, 40 Blk/17 Colored, Put together as 6 wts, weaned long time with 2 rounds of vaccinations, \$250.00

Graded Sales, Video Board Sales, Video Sales & Loads

Hardin County Stockyard - Savannah, TN

1/22/25

50 Feeder Steers, 1,101 lbs, M&L #1, 43 Blk/BWF 6 CharX, 1 Red, 5-6 flesh, value added \$223.00

East Tennessee Livestock Center Video Sale

- Sweetwater, TN

1/22/25

1 load out of 77 steers from BQA certified producer, Est weight 870 lbs, 100% L&M-1s, medium flesh 100% BLK/BWF, \$258.00

1 load out of 65 steers from BQA certified producer, Est weight 895 lbs, 95% L&M-1s and 5% L&M-2s, medium flesh 100% BLK/BWF, \$260.00

East Tennessee Cattle Alliance Preconditioned Graded Feeder Sale - Greeneville, TN

Weighted Average Report for 1/23/25

For complete report:

https://www.ams.usda.gov/mnreports/ams_2075.pdf

Department of Agricultural and Resource Economics

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USDA / Tennessee Department of Agriculture Market News Service <https://www.tn.gov/agriculture/farms/news.html>

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