

DIRECTIONS STATISTICS

The National Cattlemen’s Beef Association is pleased to present the 30th annual edition of Directions. This special edition of National Cattlemen includes useful beef industry trends and statistics, as well as information about NCBA and current priorities. The information included in this section is compiled each year by the analysts at CattleFax over the course of several months. The information comes from open, voluntary and proprietary sources. While every effort is made to ensure the information contained within is accurate, some individual operations may have been overlooked and others may have chosen not to be included. If you would like to participate in next year’s listings, please contact NCBA at (800) 825-7525 and request to be included in the 2025 survey. Please note that all listings must meet the rankings criteria to be considered.

Cattle and Calves on Farms (000 head) Jan. 1, 2024

Cattle and calf numbers are down from 2023 by 1.9%. Total head on Jan. 1, 2023, was 88.9 million head whereas total head on Jan. 1, 2024, was 87.2 million head. According to USDA’s National Agricultural Statistics Service, cattle numbers were down in all but one region from the previous year.

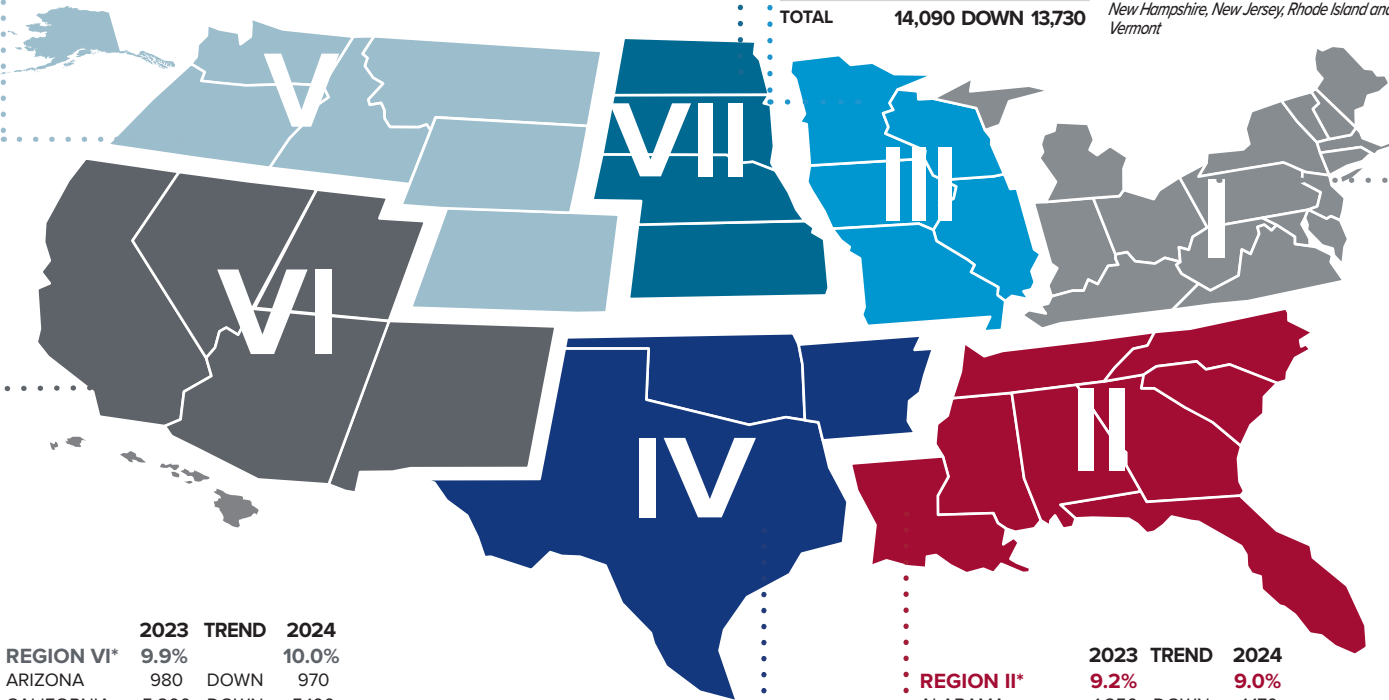
	2023	TREND	2024
REGION V*	12.3%		12.6%
ALASKA	18	UP	19
COLORADO	2,650	DOWN	2,610
IDAHO	2,500	UP	2,550
MONTANA	2,160	DOWN	2,120
OREGON	1,220	UP	1,240
WASHINGTON	1,150	UP	1,170
WYOMING	1,260	FLAT	1,260
TOTAL	10,958	UP	10,969

	2023	TREND	2024
REGION VII*	20.2%		20.1%
KANSAS	6,200	DOWN	6,150
NEBRASKA	6,500	DOWN	6,250
NORTH DAKOTA	1,740	DOWN	1,660
SOUTH DAKOTA	3,500	DOWN	3,450
TOTAL	17,940	DOWN	17,510

	2023	TREND	2024
REGION III*	15.9%		15.8%
ILLINOIS	990	UP	1,000
IOWA	3,500	DOWN	3,450
MINNESOTA	2,150	DOWN	2,130
MISSOURI	4,100	DOWN	3,950
WISCONSIN	3,350	DOWN	3,200
TOTAL	14,090	DOWN	13,730

	2023	TREND	2024
REGION I*	11.4%		11.6%
INDIANA	790	FLAT	790
KENTUCKY	1,910	DOWN	1,890
MARYLAND	157	UP	161
MICHIGAN	1,120	DOWN	1,090
NEW ENGLAND**	453	DOWN	435
NEW YORK	1,410	FLAT	1,410
OHIO	1,240	FLAT	1,240
PENNSYLVANIA	1,350	UP	1,380
VIRGINIA	1,290	UP	1,320
WEST VIRGINIA	375	DOWN	370
TOTAL	10,095	DOWN	10,086

*Connecticut, Delaware, Maine, Massachusetts, New Hampshire, New Jersey, Rhode Island and Vermont

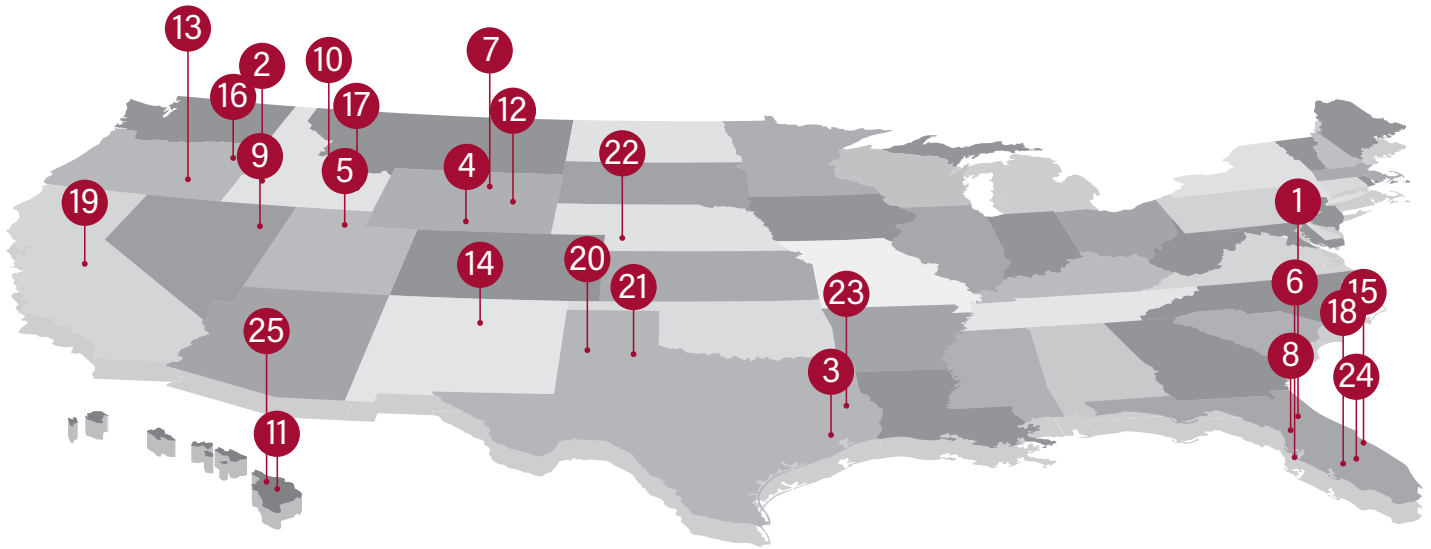


	2023	TREND	2024
REGION VI*	9.9%		10.0%
ARIZONA	980	DOWN	970
CALIFORNIA	5,200	DOWN	5,100
HAWAII	148	DOWN	142
NEVADA	435	DOWN	430
NEW MEXICO	1,330	DOWN	1,290
UTAH	740	UP	750
TOTAL	8,833	DOWN	8,682

	2023	TREND	2024
REGION IV*	21.1%		21.0%
ARKANSAS	1,610	DOWN	1,570
OKLAHOMA	4,600	UP	4,700
TEXAS	12,500	DOWN	12,000
TOTAL	18,710	DOWN	18,270

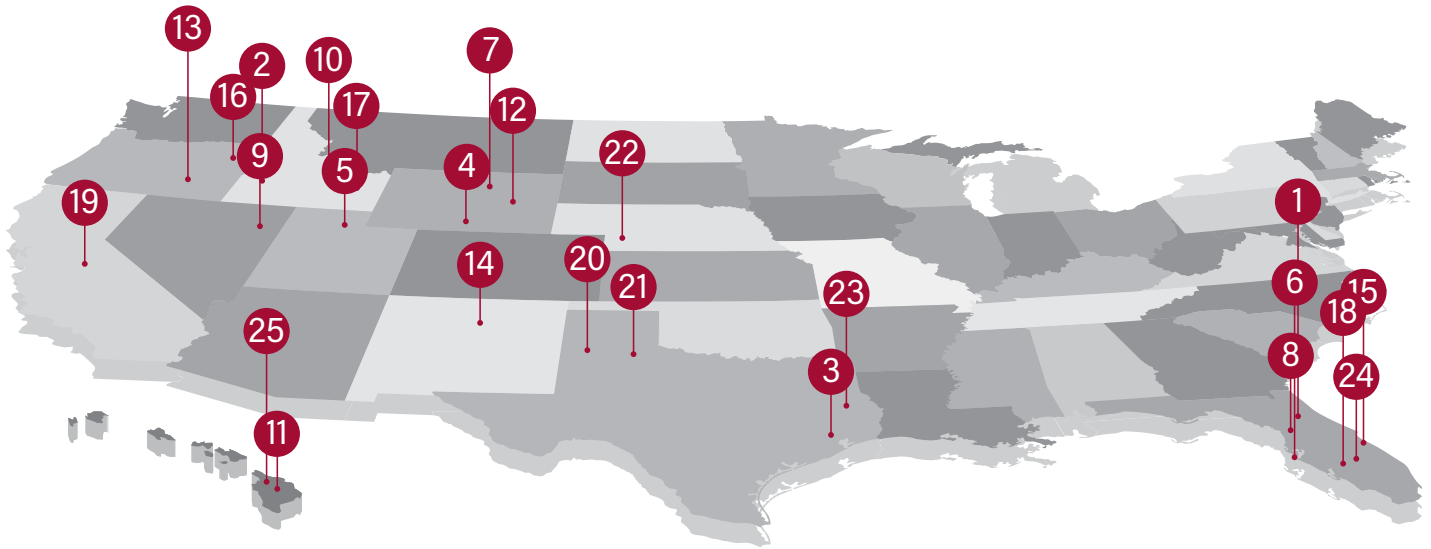
	2023	TREND	2024
REGION II*	9.2%		9.0%
ALABAMA	1,250	DOWN	1,170
FLORIDA	1,610	DOWN	1,560
GEORGIA	1,030	DOWN	1,010
LOUISIANA	750	DOWN	720
MISSISSIPPI	850	DOWN	810
NORTH CAROLINA	730	UP	750
SOUTH CAROLINA	315	DOWN	209
TENNESSEE	1,680	DOWN	1,600
TOTAL	8,215	DOWN	7,829

*Percent of the entire U.S. cow herd.



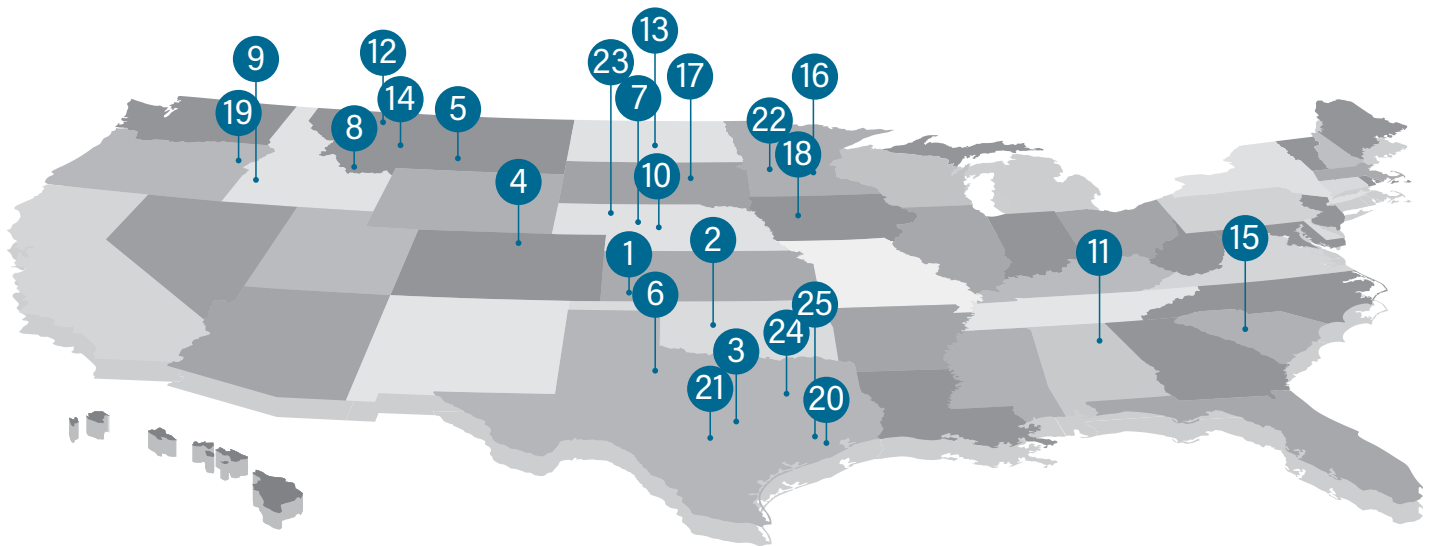
TOP 25 COW-CALF

		LOCATION	OWNED BY	CEO/MANAGER	BREEDS
1	Deseret Cattle & Citrus	St. Cloud, FL	Farmland Reserve, Inc.	Clint Richardson	Simbrah, Brangus, Angus
2	J.R. Simplot Co.	Boise, ID	Simplot Family	Thomas J. Basabe	Angus, Hereford, Charolais
3	King Ranch Inc.	Houston, TX	King Ranch Inc.	Robert Hodgen	Santa Gertrudis, Angus
4	Silver Spur Land & Cattle, LLC	Encampment, WY	N/A	Thad York	N/A
5	Ensign Ranches	North Salt Lake, UT	Robinson & Freed Families	Chris Robinson	Angus, SimAngus, Charolais
6	Lykes Bros. Inc.	Tampa, FL	Lykes Family	Johnnie James	Brangus, Beefmaster, Angus, Charolais
7	Padlock Ranch Co.	Ranchester, WY	Scott Family	Dr. Trey Patterson	Stabilizer Composite, SimAngus
8	Lightsey Cattle Co.	Lake Wales, FL	N/A	Cary Lightsey	Braford & Brangus Charolais cross
9	Ellison Ranching Co.	Tuscarora, NV	N/A	N/A	N/A
10	Matador Ranch & Cattle, LLC	Dillon, MT	Rupert Murdoch	Bert Glover	Hereford, Angus, Wagyu, Charolais
11	Parker Ranch, Inc.	Kamuela, HI	Parker Ranch Foundation Trust	Jacob Tavares	Angus, SimAngus, Charolais
12	True Ranches, LLC	Casper, WY	True Family	Stetson Weber	Angus, Hereford
13	Roaring Springs Ranch	Frenchglen, OR	Robert Sanders Family	Stacy L. Davies	Angus, SimAngus, Beefmaster, Tarentaise, Wagyu



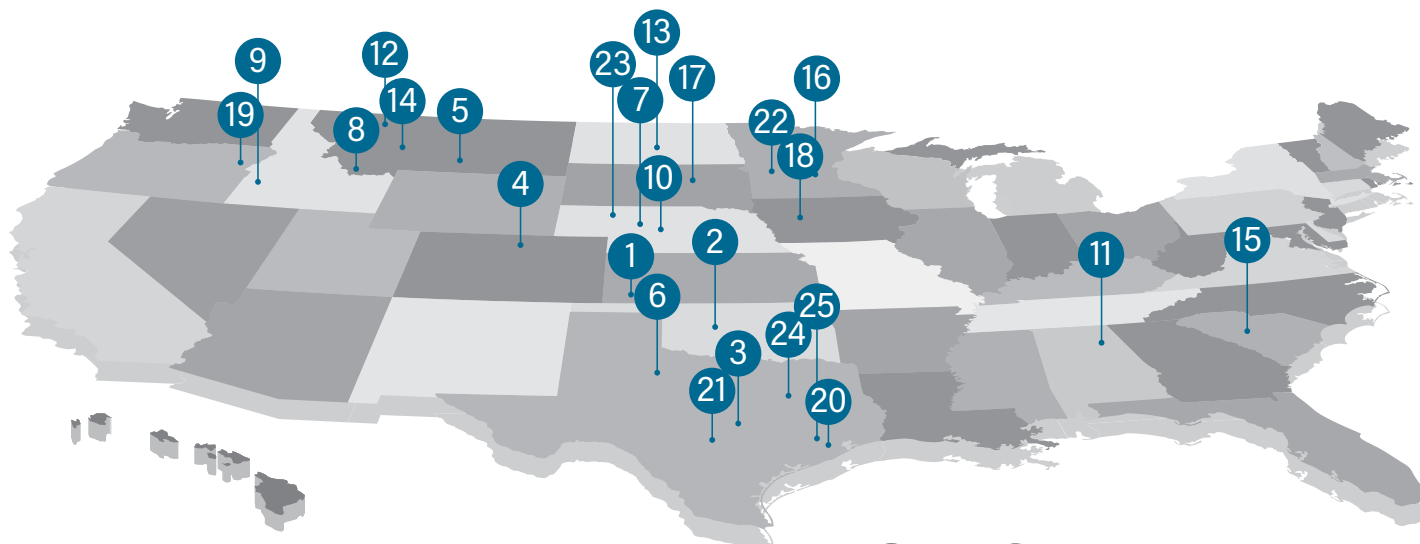
TOP 25 COW-CALF

		LOCATION	OWNED BY	CEO/MANAGER	BREEDS
14	Singleton Ranches	Lamy, NM	Singleton Properties, LLC	Will Singleton	N/A
15	Adams Ranch	Ft. Pierce, FL	Adams Family	Michael L. Adams	Braford & Abee (Braford composite)
16	Beef Northwest Feeders	North Powder, OR	Wilson Family, Partners	Julian Garcia	Angus, Charolais
17	Foster Cattle, LLC	Rigby, ID	Brad & Sharol Foster	Drue Summers	Angus
18	Abell Livestock Co. LLC	Venus, FL	Abell Family	Lucy Abell	Braford, Brangus, Angus, Charolais, SimAngus
19	Martin Livestock, LLC	Ione, CA	Duane Martin Jr.	Duane Martin Jr.	N/A
20	Spade Ranches, Ltd.	Lubbock, TX	Chappell & Bassham Families	Wesley Welch	Balancer, SimAngus
21	Pitchfork Land & Cattle Co.	Guthrie, TX	Williams Family	Mary Randolph Ballinger, Brooks Hodges	Angus
22	Maddux Cattle Co.	Imperial, NE	Maddux Family	John Maddux	Red Angus, Tarentaise, Devon, South Devon, Red Poll
23	Stalwart Ranches	Crockett, TX	Mike Manners	Bill Cawley	Brangus
24	Williamson Cattle Company	Okeechobee, FL	Williamson Family	Frank W. Williamson III	Brangus
25	Ponoholo Ranch, Ltd.	Kohala, HI	von Holt Family	Sabrina English	Angus, Charolais, Tarentaise



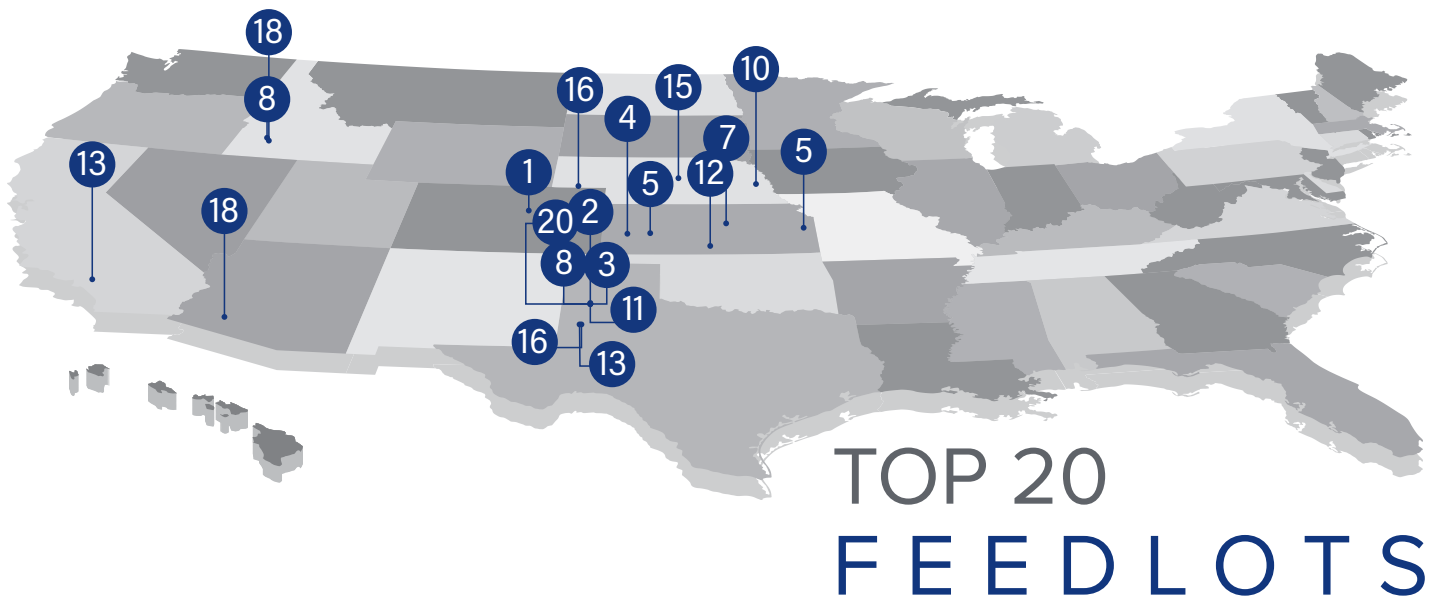
TOP 25 SEEDSTOCK

		LOCATION	OWNED BY	CEO/MANAGER	SUBSIDIARIES	TOTAL MARKETINGS	# OF REGISTERED FEMALES	BREEDS UTILIZED
1	Gardiner Angus Ranch, Inc.	Ashland, KS	The Henry Gardiner Family	Mark Gardiner	N/A	5,561	584	Angus
2	Express Ranches	Yukon, OK	Robert A. Funk	Kevin Hafner, Donnie Robertson, Mark Squires	Express UU Bar	3,928	4,015	Angus, Hereford
3	44 Farms	Cameron, TX	Robert S. McClaren	Tracy Woods	Prime Pursuits	2,910	1,600	Angus
4	Leachman Cattle of Colorado, LLC	Fort Collins, CO	URUS Group & Partners	Lee Leachman	Leachman, TopLine, & Cooperators	2,733	NA	Stabilizer, Angus, Red Angus, Charolais
5	Vermilion Ranch	Billings, MT	Pat Goggins Family	Joe Goggins	N/A	1,450	2,350	Angus
6	R.A. Brown Ranch	Throckmorton, TX	Donnell & Kelli Brown	Donnell Brown	N/A	1,320	3,459	Angus, Red Angus, Black Red Angus, SimAngus
7	Connealy Angus Ranch	Whitman, NE	Connealy Family	Jerry, Jed, & Gabriel Connealy	N/A	1,267	4,200	Angus
8	Sitz Angus Ranch	Harrison/Dillon, MT	Bob & Jim Sitz & Family	Bob & Jim Sitz	N/A	1,193	2,382	Angus
9	Shaw Cattle Co., Inc.	Caldwell, ID	Greg Shaw Family	Tucker & Sam Shaw	N/A	1,175	1,550	Hereford, Angus, Red Angus
10	Hoffman Ranch, LLC	Thedford, NE	Dennis & Jason Hoffman	NA	N/A	1,025	1,200	Hereford, Angus
11	American Cattle Enterprise	Oneonta, AL	Ricky Cleveland, Erik Wiley, Kim Wiley	Ricky Cleveland, Erik Wiley	N/A	1,015	1,226	Brangus, Ultra- Black
12	DeBruycker Charolais	Dutton, MT	DeBruycker Family	Brett & Mark DeBruycker	N/A	1,000	2,200	Charolais
13	Schaff Angus Valley	St. Anthony, ND	Kelly & Martie Jo Schaff	Kelly Schaff	N/A	997	787	Angus



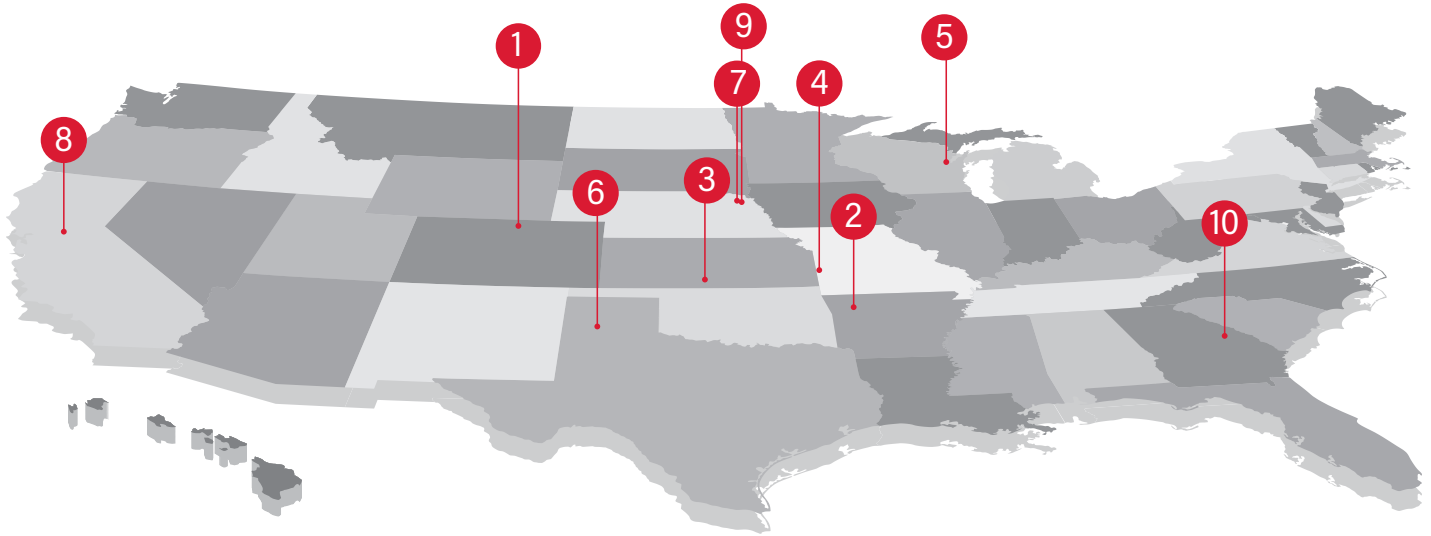
TOP 25 SEEDSTOCK

		LOCATION	OWNED BY	CEO/MANAGER	SUBSIDIARIES	TOTAL MARKETINGS	# OF REGISTERED FEMALES	BREEDS UTILIZED
14	Stevenson's Diamond Dot Cattle Co.	Hobson, MT	Clint Stevenson Family	Clint Stevenson	N/A	782	1,700	Angus
15	Yon Family Farms	Ridge Spring, SC	The Yon Family	The Yon Family	N/A	767	1,695	Angus, SimAngus, Ultrablack
16	Schiefelbein Farms, LLC	Kimball, MN	Schiefelbein Family	Don Schiefelbein	Schiefelbein Feeders, LLC	710	1,100	Angus, Sim-Angus
17	Bieber Red Angus Ranch	Leola, SD	Craig & Peggy Bieber	Craig Bieber	Bieber Holdings	698	900	Red Angus
18	Nichols Farms Ltd.	Bridgewater, IA	Family Ownership	Lillian M. Nichols	Ayers Stock Farm, Havens Cattle Co, Lincoln Center Partnership	660	2,000	Angus, Simmental, South Devon
19	Thomas Angus Ranch	Baker City, OR	The Thomas Family	Robert E. Thomas	N/A	652	775	Angus, Red Angus
20	J.D. Hudgins, Inc.	Hungerford, TX	J.D. Hudgins Family	Coleman H. Locke	N/A	624	1,900	Brahman
21	HeartBrand Cattle Co.	Harwood, TX	Beeman Family	Jordan Beeman	N/A	596	4,926	Akaushi
22	Wulf Cattle	Morris, MN	Riverview LLP	Mitch Fehr	N/A	591	2,300	Limousin, LimFlex, Angus
23	Krebs Ranch	Gordon, NE	Eldon & Louisa Krebs	Eldon & Louisa Krebs	N/A	590	800	Angus
24	Cavender Ranches	Jacksonville, TX	Joe Cavender	Justin Matejka	N/A	575	750	Brangus, Charolais
25	V8 Ranch, Inc.	Boling, TX	Sloan Williams	Jim Williams	N/A	555	500	Brahman



TOP 20 FEEDLOTS

		LOCATION	OWNED BY	CEO/MANAGER	CAPACITY	# OF YARDS	STATES OF OPERATION
1	Five Rivers Cattle Feeding, LLC.	Johnstown, CO	Pinnacle Arcadia	Mike Thoren	870,000	13	Arizona, Texas, Oklahoma, Kansas, Colorado, Idaho
2	Cactus Feeders	Amarillo, TX	100% Employee owned	Paul Defoor & Brad Hastings	628,000	13	Texas, Kansas, Colorado
3	Friona Industries, L.P.	Amarillo, TX	Privately Held	Donald Gales	610,000	8	Texas, Kansas
4	Cobalt Cattle Company, LLC.	Garden City, KS	Privately Held	Joel Jarnagin	355,000	6	Texas, Kansas, Colorado
5	Irsik & Doll Feed Services, Inc.	Cimarron, KS	Privately Held	Scott Shill	280,000	7	Kansas
5	Foote Cattle Company, LLC	Bucyrus, KS	Bob Foote Family	Scott, Brad & Greg Foote	280,000	5	Kansas, Nebraska
7	Innovative Livestock Services Inc.	Great Bend, KS	Privately Held	Bronson Smith	235,000	7	Kansas, Nebraska
8	J. R. Simplot Co.	Boise, ID	Simplot Family	Thomas J. Basabe	230,000	2	Idaho, Washington
8	Oppliger Feedyard, Inc.	Amarillo, TX	Don Oppliger Family	Ben Oppliger	230,000	6	Texas, Nebraska, New Mexico
10	Gottsch Cattle Co.	Elkhorn, NE	Brett & Bill Gottsch	Brett Gottsch	195,500	3	Nebraska
11	Tejas Feeding Group	Amarillo, TX	Mike Smith	Mike Smith	155,000	4	Texas
12	Pratt Feeders	Pratt, KS	Privately Held	Dave Latta	139,000	4	Kansas, Oklahoma
13	Harris Feeding Co.	Coalinga, CA	Central Vally Meat Holding Company	Brian Coelho	135,000	2	California, Nevada
13	Barrett and Crowfoot	Hereford, TX	Barrett & Weishaar Families	Rob Barrett	135,000	2	Texas
15	Adams Land & Cattle, LLC	Broken Bow, NE	Bill & Jerry Adams	Jerry Adams	128,000	3	Nebraska
16	Dinklage Feed Yard, Inc.	Sidney, NE	Shareholders	Rex Trumbull	125,000	4	Nebraska, Wyoming, Colorado
16	Bar-G Feedyard	Hereford , TX	Livestock Investors LTD	Johnny Trotter	125,000	2	Texas
18	Pinal Feeding Co.	Laveen, AZ	Northside Hay Company	Earl Petznick Jr.	110,000	3	Arizona
18	AB Livestock, LLC	Boise, ID	Rebholtz Family	Robert Rebholtz Jr.	110,000	5	Washington, Idaho
20	Dean Cluck Feedyard, Inc.	Amarillo, TX	Stockholders	Monte Cluck	105,000	3	Texas

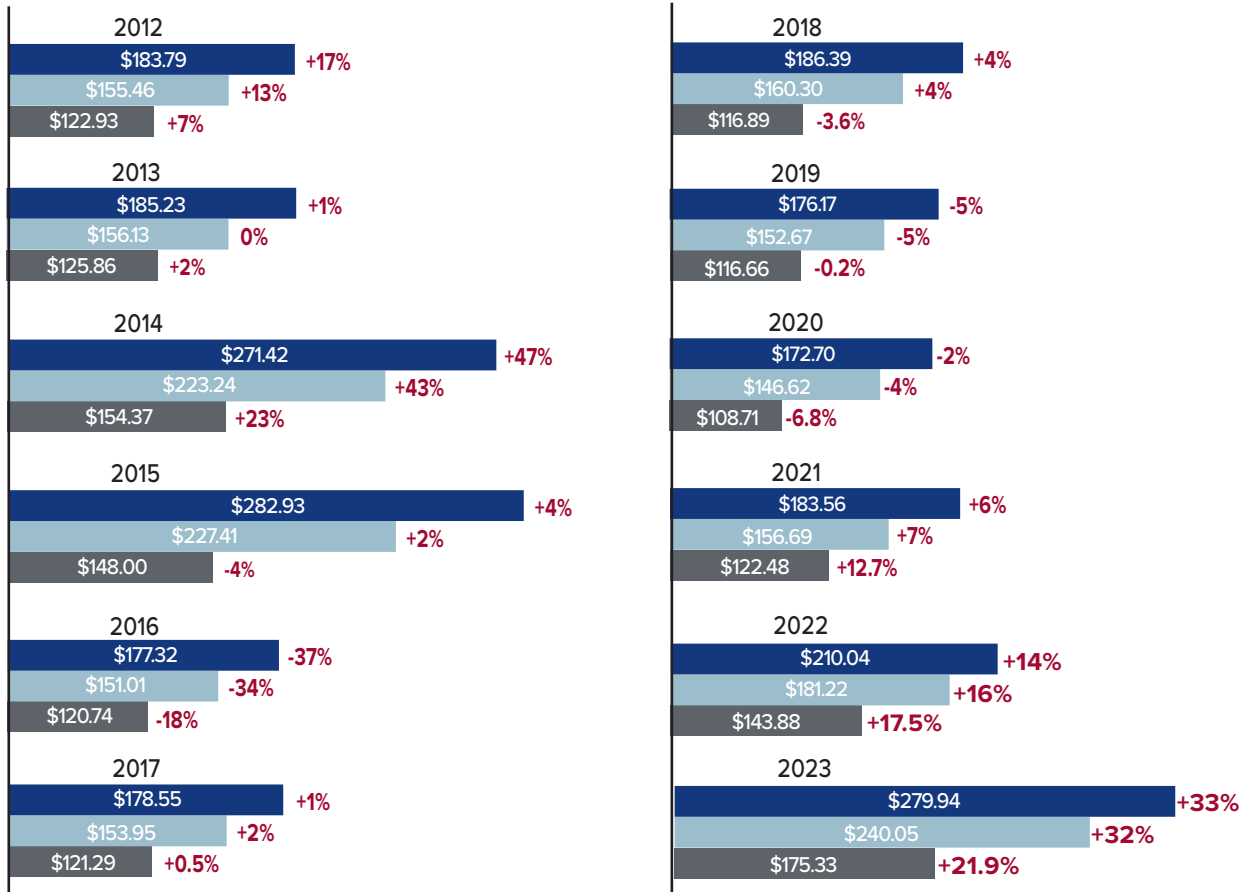


TOP 10 BEEF SLAUGHTER OPERATIONS

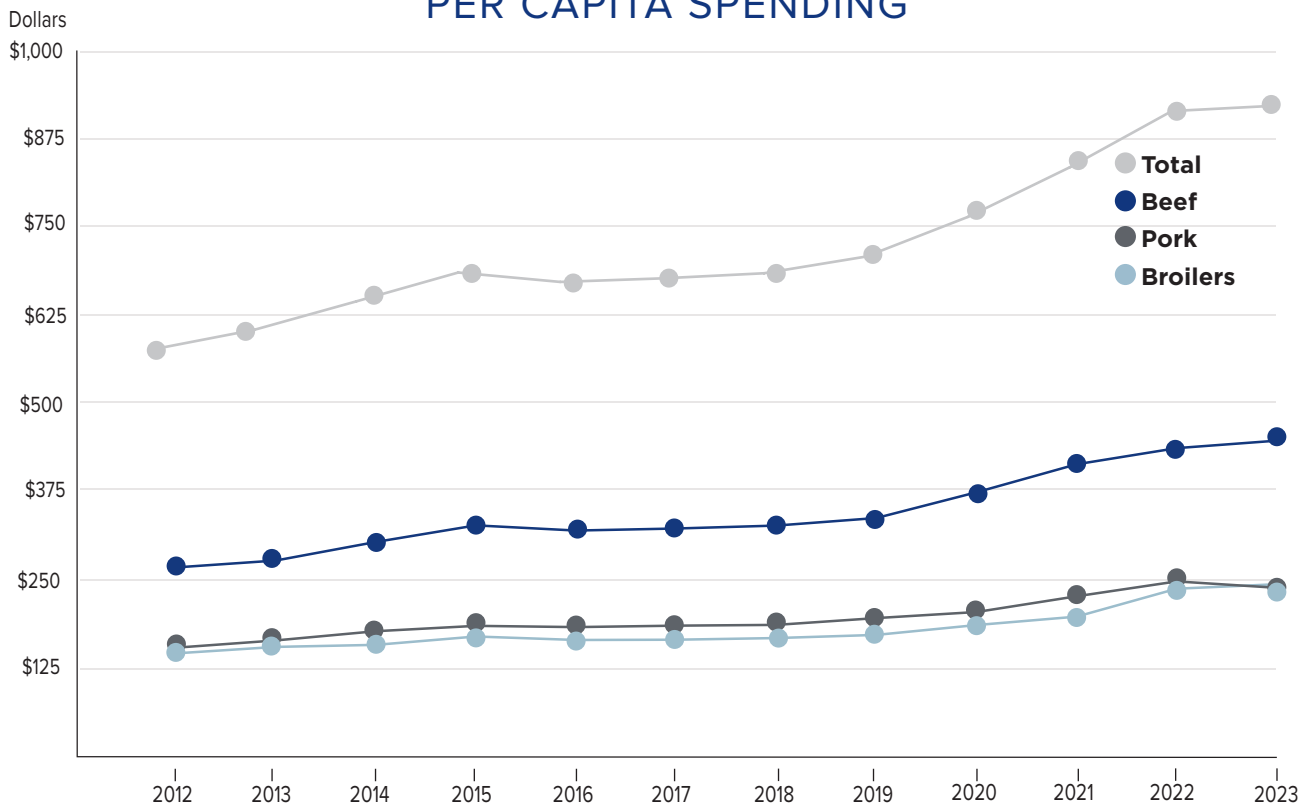
		LOCATION	OWNED BY	CEO/MANAGER	SUBSIDIARIES	DAILY SLAUGHTER CAPACITY	2023 SALES	ANNUAL SLAUGHTER TOTAL	# OF BEEF PLANTS
1	JBS USA	Greeley, CO	JBS	Wesley Batista	N/A	27,000	\$14 Billion	7,000,000	9
2	Tyson Foods	Springdale, AR	Tyson Foods, Inc. (Publically Traded on NYSE)	Donnie King	N/A	N/A	\$19.9 Billion	N/A	6
3	Cargill	Wichita, KS	Cargill Family	Brian Sikes	N/A	22,000	N/A	N/A	6
4	National Beef Packing Company, LLC	Kansas City, MO	Marfrig Global Foods S.A.; U.S. Premium Beef, LLC; others	Tim Klein	National Carriers, Inc.; National Beef Leathers, LLC; Kansas City Steak Company, LLC; National Beef Ohio, LLC; and Iowa Premium, LLC	13,200	\$11.9 Billion	N/A	3
5	American Foods Group, LLC	Green Bay, WI	Rosen's Diversified Inc.	Steve Van Lannen	America's Service Line, LLC; Midwest Express, LLC	N/A	\$4 Billion	N/A	7
6	Caviness Beef Packers/CS Beef Packers	Amarillo, TX/ Kuna, ID	Caviness & Simplot	Terry Caviness, Steve Cherry	N/A	4,750	\$1.9 Billion	1,038,000	3
7	Greater Omaha Packing	Omaha, NE	Privately Owned	Henry Davis	N/A	2,900	\$1.8 Billion	650,000	1
8	Harris Ranch Beef	Selma, CA	Brian Coelho	Brian Coelho	Central Valley Meats	2,500	N/A	N/A	2
9	Nebraska Beef	Omaha, NE	Corporation	William Hughes	N/A	2,500	N/A	N/A	1
10	FPL Food, LLC	Augusta, GA	Private	Francois P. Leger	2 Cattle Feeding Operations	1,500	\$708 million	261,000	3

STEER PRICES

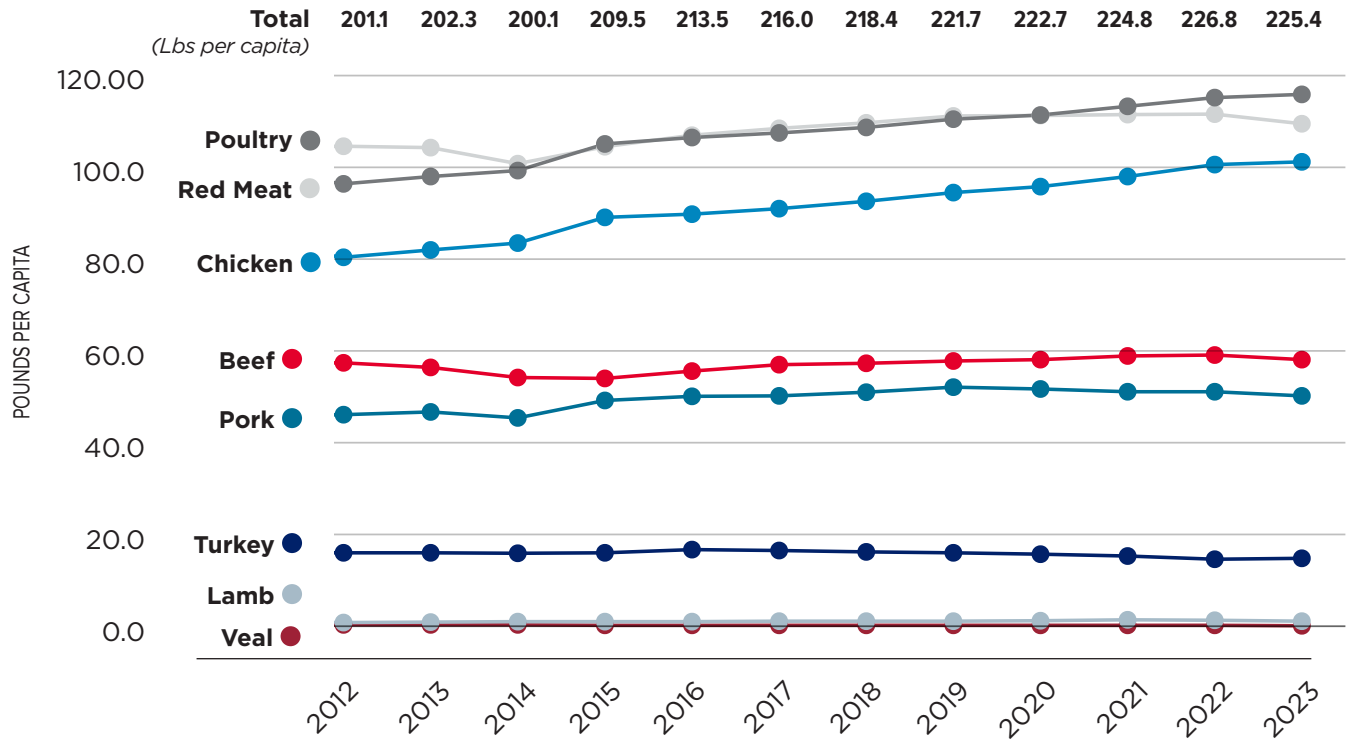
■ 450 lb ■ 650 lb ■ Fed Steer % Change from Previous Year



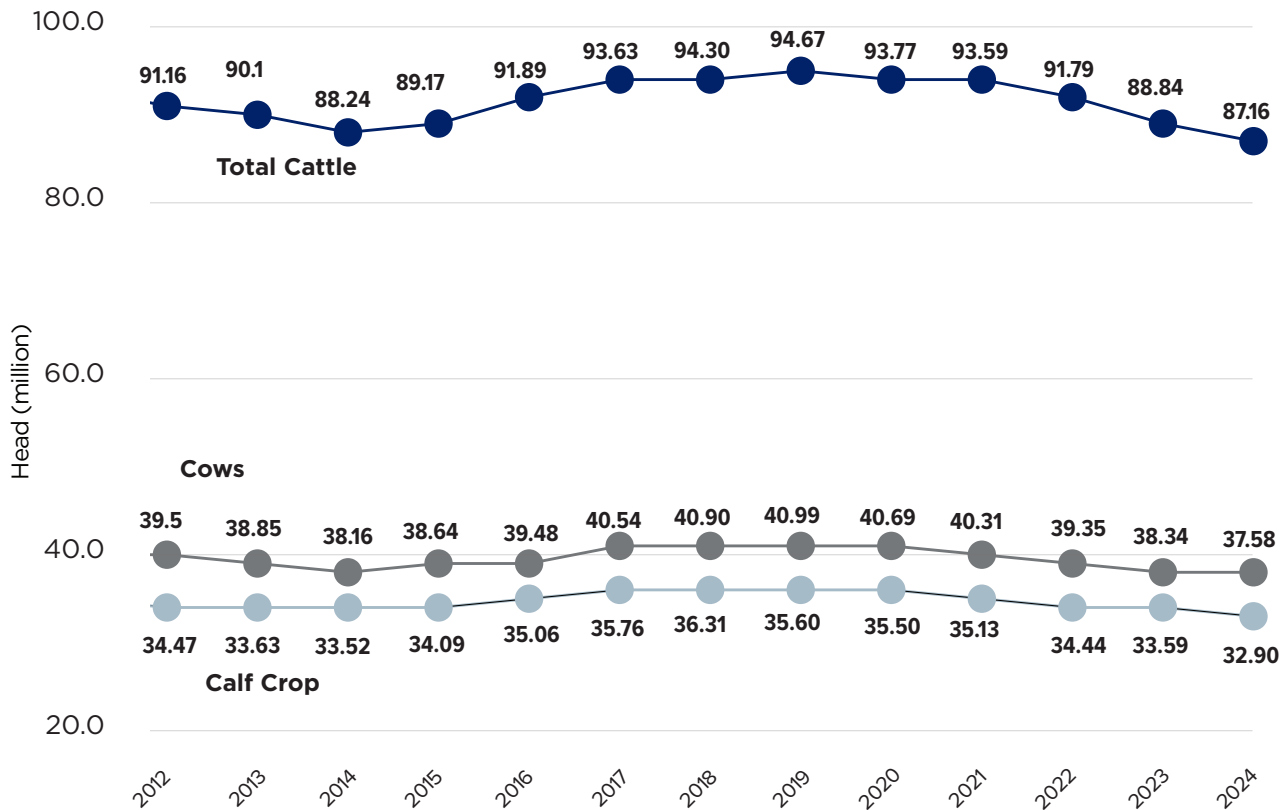
PER CAPITA SPENDING



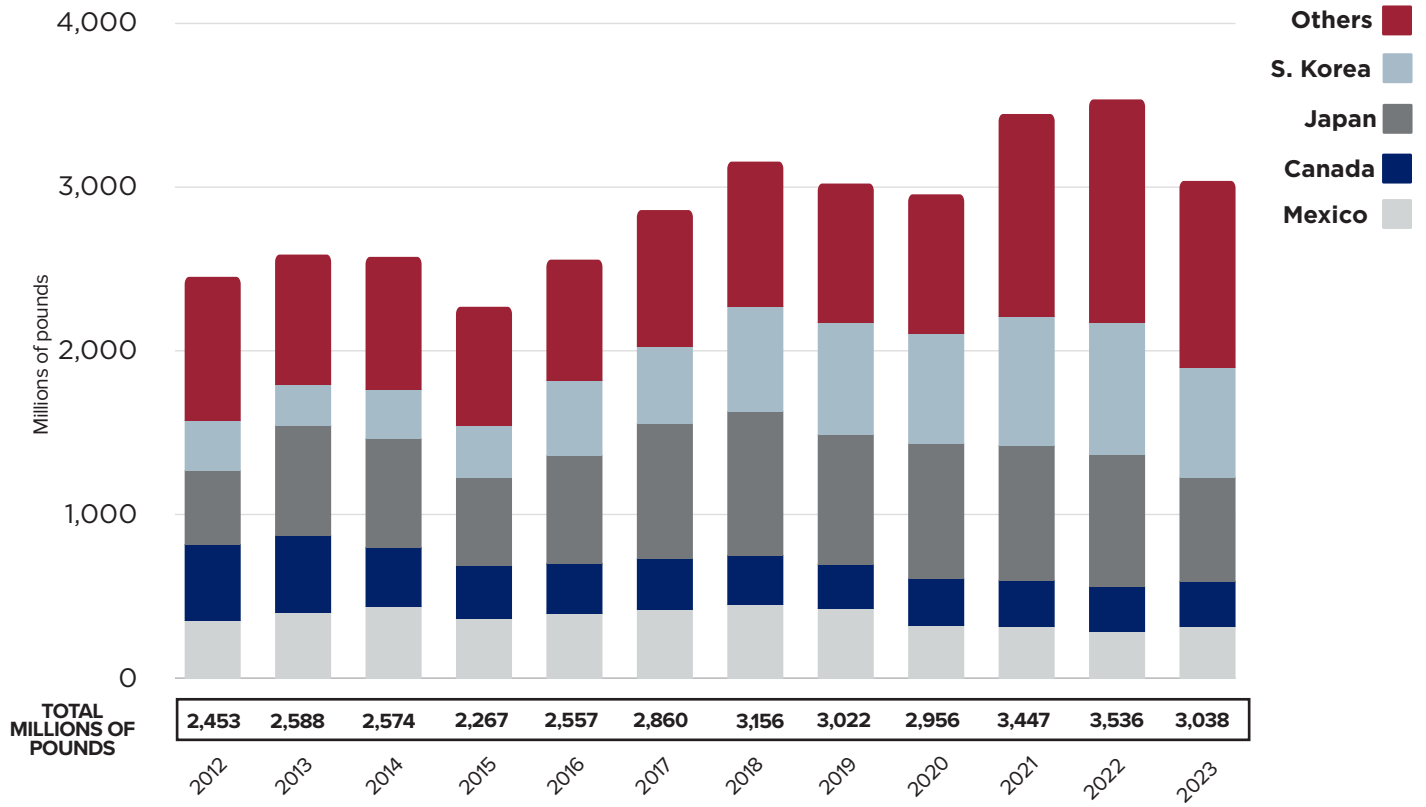
TOTAL RETAIL MEAT SUPPLY



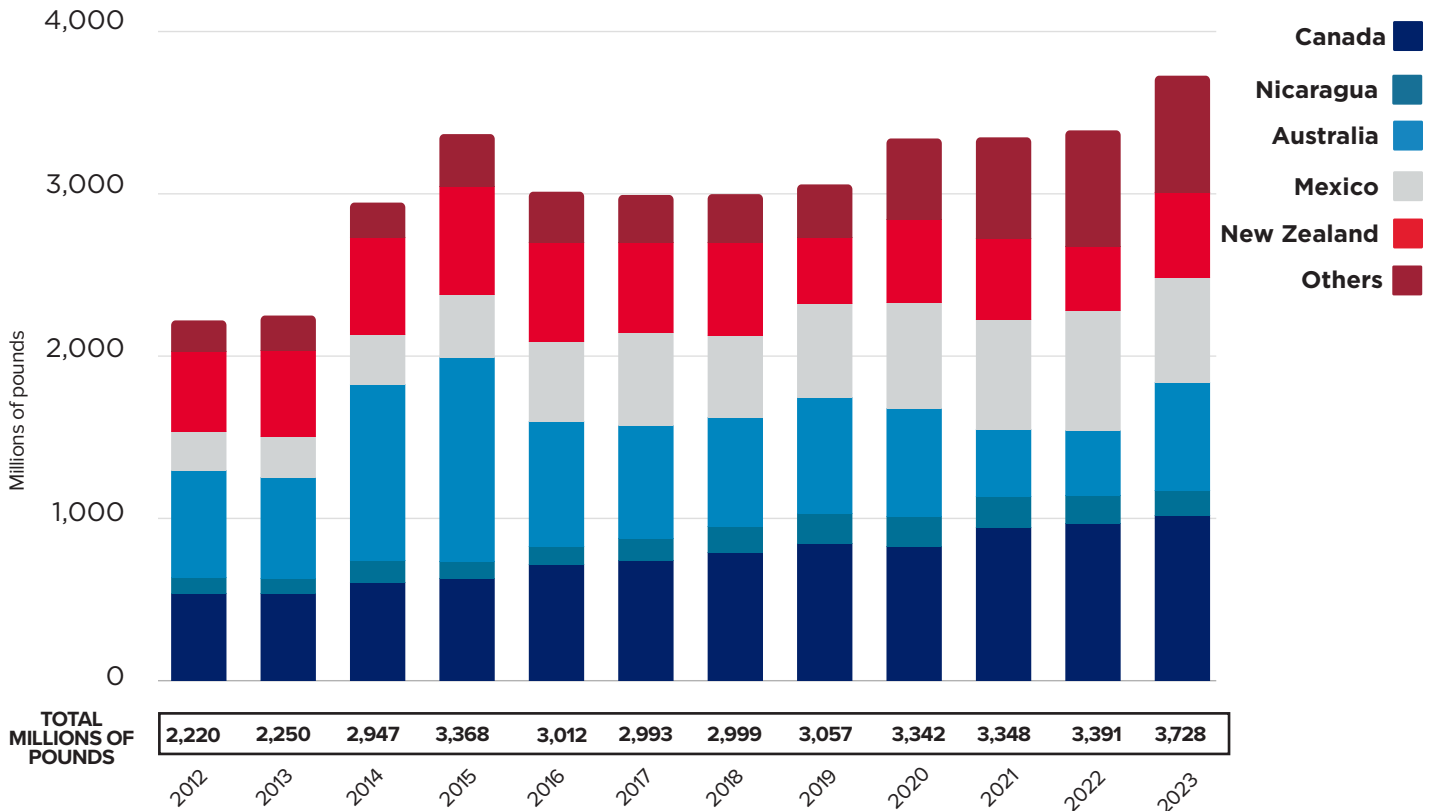
CATTLE HERD INVENTORY



BEEF EXPORTS

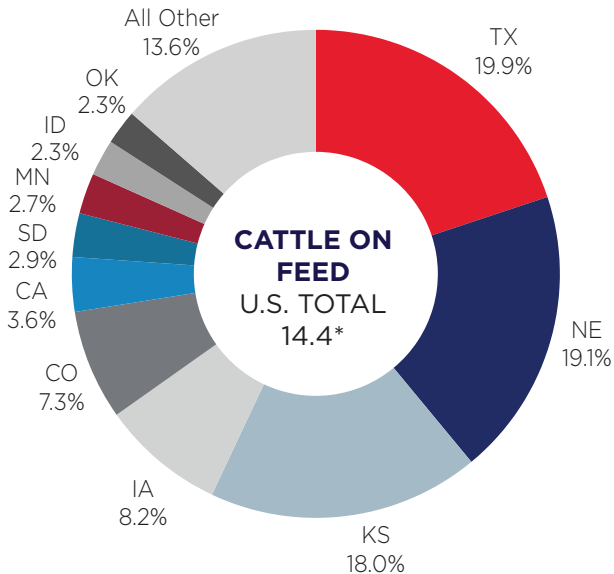
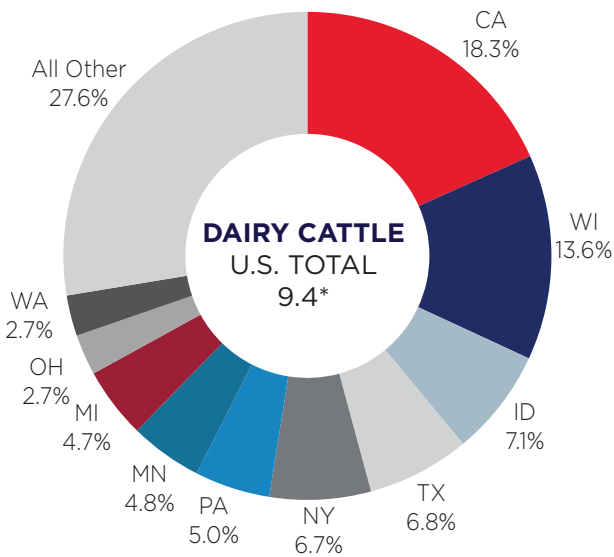
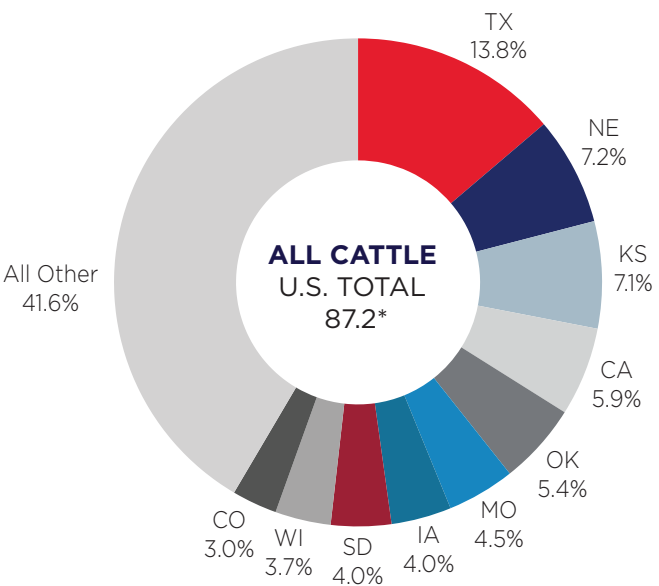
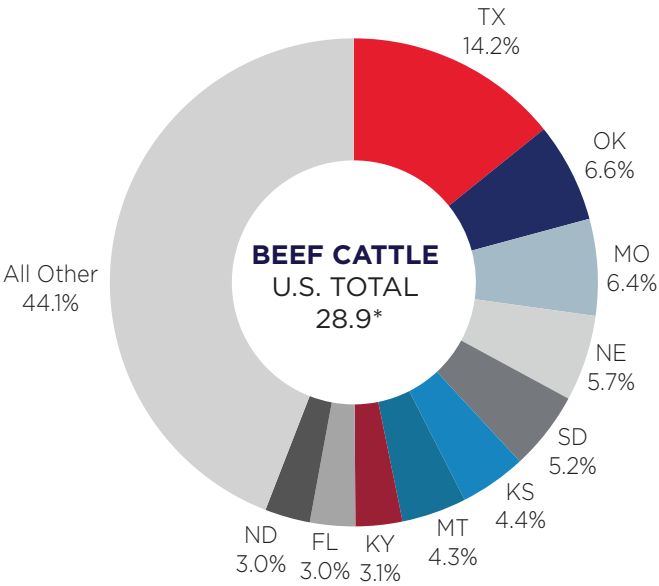


BEEF IMPORTS

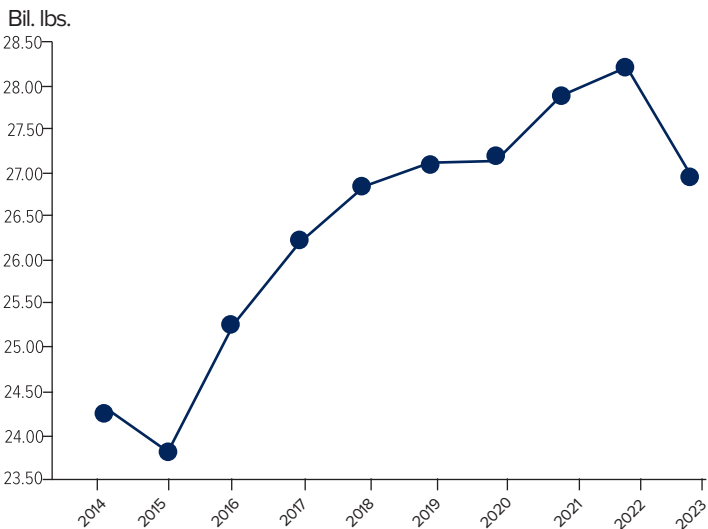


TOP 10 CATTLE STATES FOR 2024

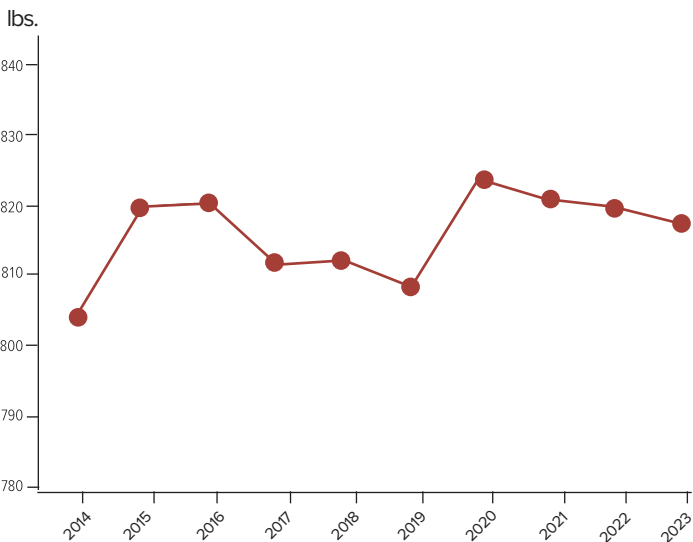
(*Millions)



BEEF PRODUCTION



COLD CARCASS WEIGHTS



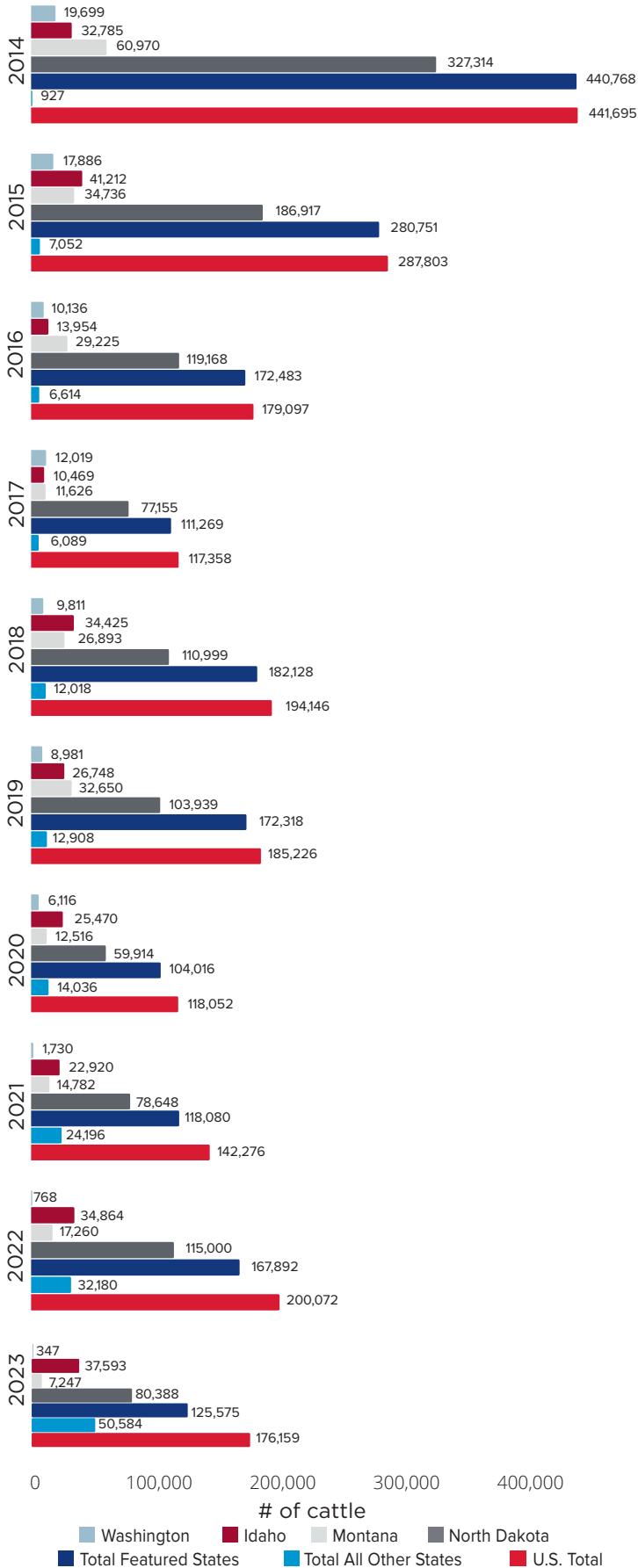
CATTLE INVENTORY BY CLASS - STATES AND UNITED STATES

JAN. 1, 2023 AND 2024

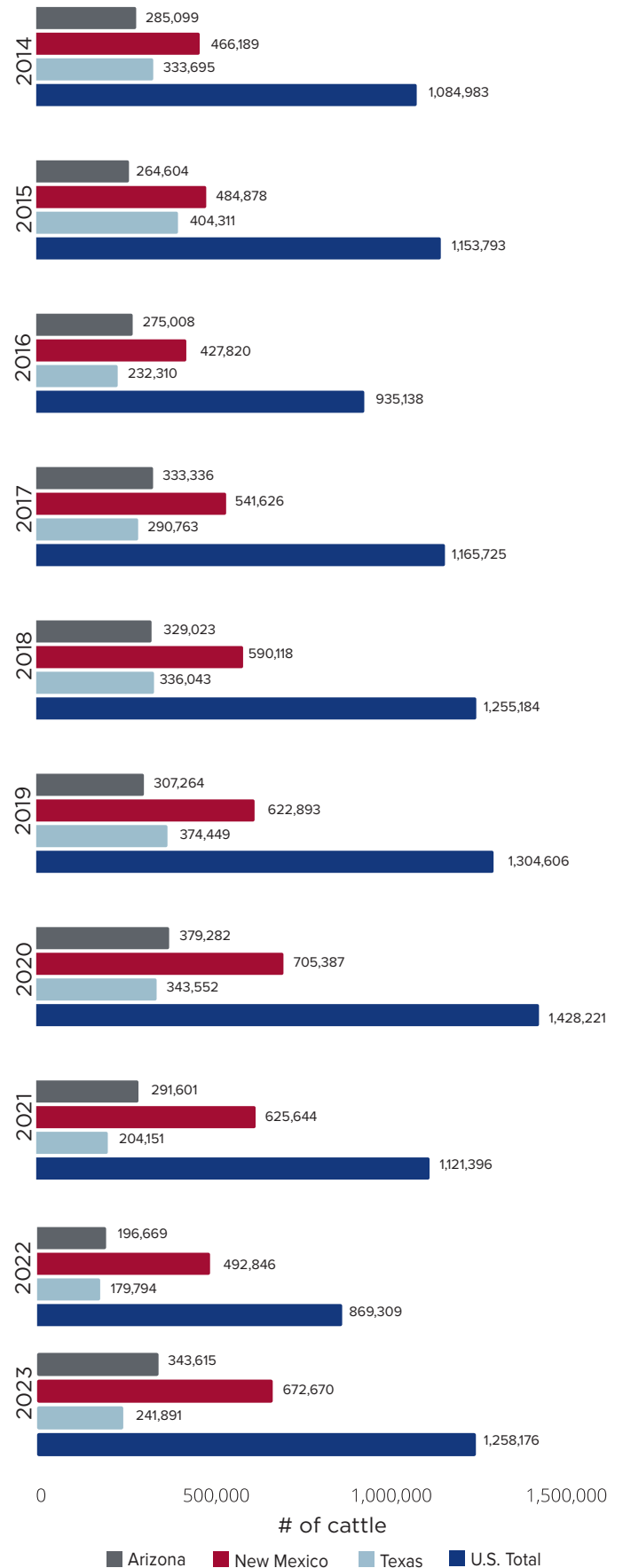
State	Beef Cows That Have Calved			Milk Cows That Have Calved		
	2023 (1,000 Head)	2024 (1,000 Head)	Perecent of Previous Year	2023 (1,000 Head)	2024 (1,000 Head)	Perecent of Previous Year
Alabama	678	638	94	2	2	100
Alaska	8	8	105	0	0	100
Arizona	175	176	101	195	199	102
Arkansas	866	847	98	4	3	75
California	680	665	98	1,720	1,715	100
Colorado	648	643	99	202	197	98
Connecticut	6	6	100	19	18	95
Delaware	1	2	107	3	3	100
Florida	888	862	97	92	98	107
Georgia	478	459	96	92	91	99
Hawaii	82	80	96	1	1	83
Idaho	449	457	102	661	663	100
Illinois	331	331	100	79	79	100
Indiana	178	180	101	187	190	102
Iowa	850	810	95	240	240	100
Kansas	1,315	1,264	96	175	176	101
Kentucky	895	907	101	45	43	96
Louisiana	437	428	98	8	7	88
Maine	11	12	109	25	24	96
Maryland	40	45	113	40	40	100
Massachusetts	8	6	73	9	9	100
Michigan	101	101	100	434	439	101
Minnesota	360	350	97	455	450	99
Mississippi	439	424	97	6	6	100
Missouri	1,956	1,840	94	64	60	94
Montana	1,271	1,251	98	9	9	100
Nebraska	1,704	1,637	96	56	53	95
Nevada	232	235	101	33	35	106
New Hampshire	5	4	89	10	10	95
New Jersey	9	10	107	4	4	98
New Mexico	454	450	99	281	250	89
New York	100	100	100	630	630	100
North Carolina	341	352	103	39	38	97
North Dakota	876	860	98	14	10	71
Ohio	280	285	102	250	255	102
Oklahoma	1,991	1,922	97	39	38	97
Oregon	497	500	101	123	120	98
Pennsylvania	195	215	110	465	465	100
Rhode Island	1	1	100	1	1	100
South Carolina	159	148	93	9	8	89
South Dakota	1,533	1,502	98	187	208	111
Tennessee	854	835	98	26	25	96
Texas	4,300	4,115	96	650	635	98
Utah	323	335	104	92	90	98
Vermont	14	11	79	118	116	98
Virginia	563	574	102	67	66	99
Washington	216	223	103	254	257	101
West Virginia	191	188	98	5	4	80
Wisconsin	280	260	93	1,270	1,270	100
Wyoming	671	671	100	9	9	100
United States	28,939	28,223	98	9,398	9,357	100

FEEDER IMPORTS

CANADA

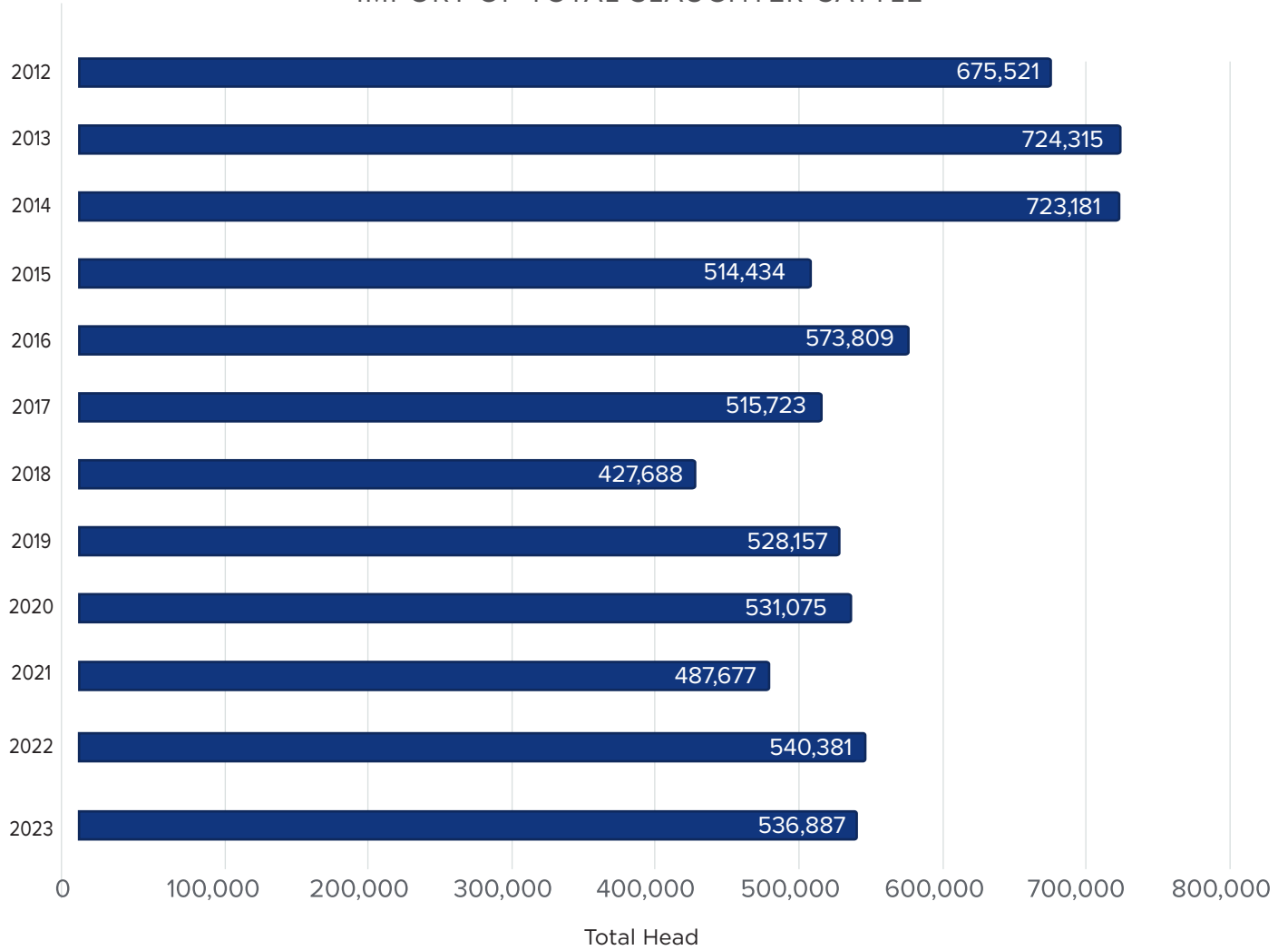


MEXICO

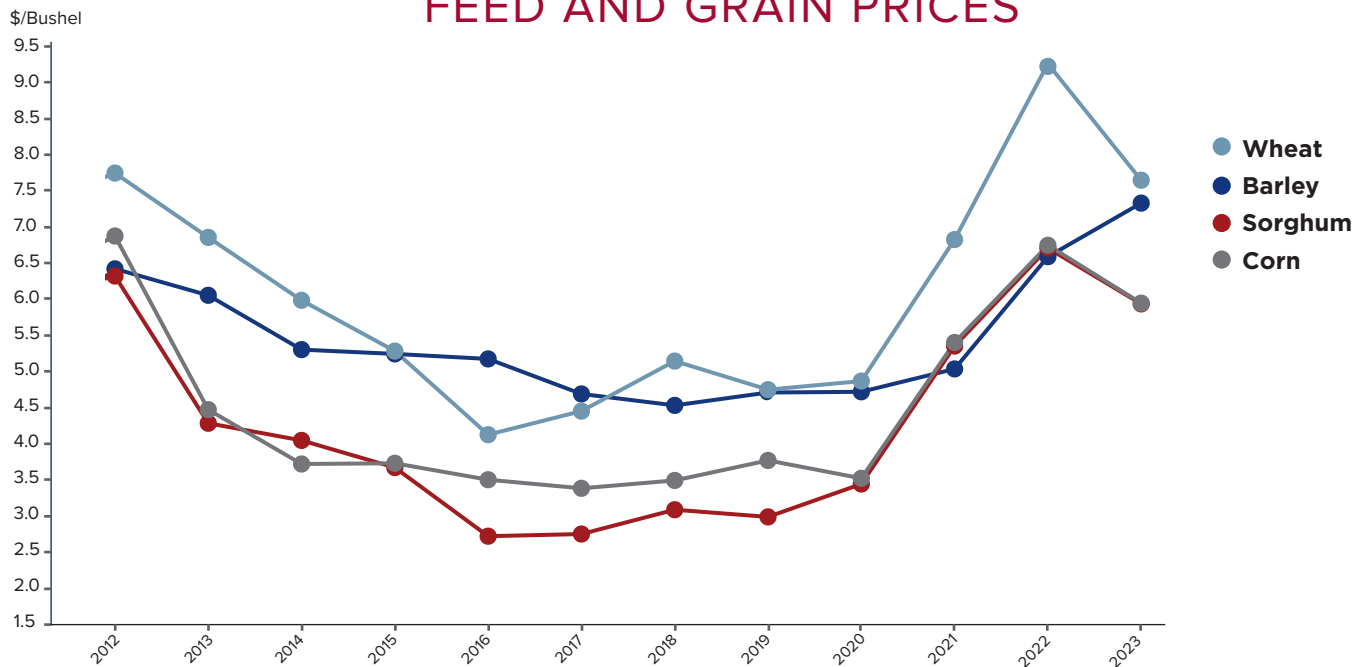


LIVE CANADIAN IMPORTS

IMPORT OF TOTAL SLAUGHTER CATTLE



FEED AND GRAIN PRICES



BYPRODUCTS

