

Montana's

# BEEF

Industry

A Global Powerhouse

[MontanaBeefCouncil.org](http://MontanaBeefCouncil.org)



# Beef Industry Fast Facts

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- Cattle are Montana's #1 livestock commodity.<sup>1</sup>
- U.S. producers raise 19% of the world's beef with only 6% of its cattle.<sup>2</sup>
- 95% of global consumers live outside of the U.S.<sup>3</sup>
- U.S. consumers spend ~10% of income on food.<sup>4</sup>

Our challenge and our opportunity is to **keep beef top of mind**, on grocery lists, and on restaurant menus.

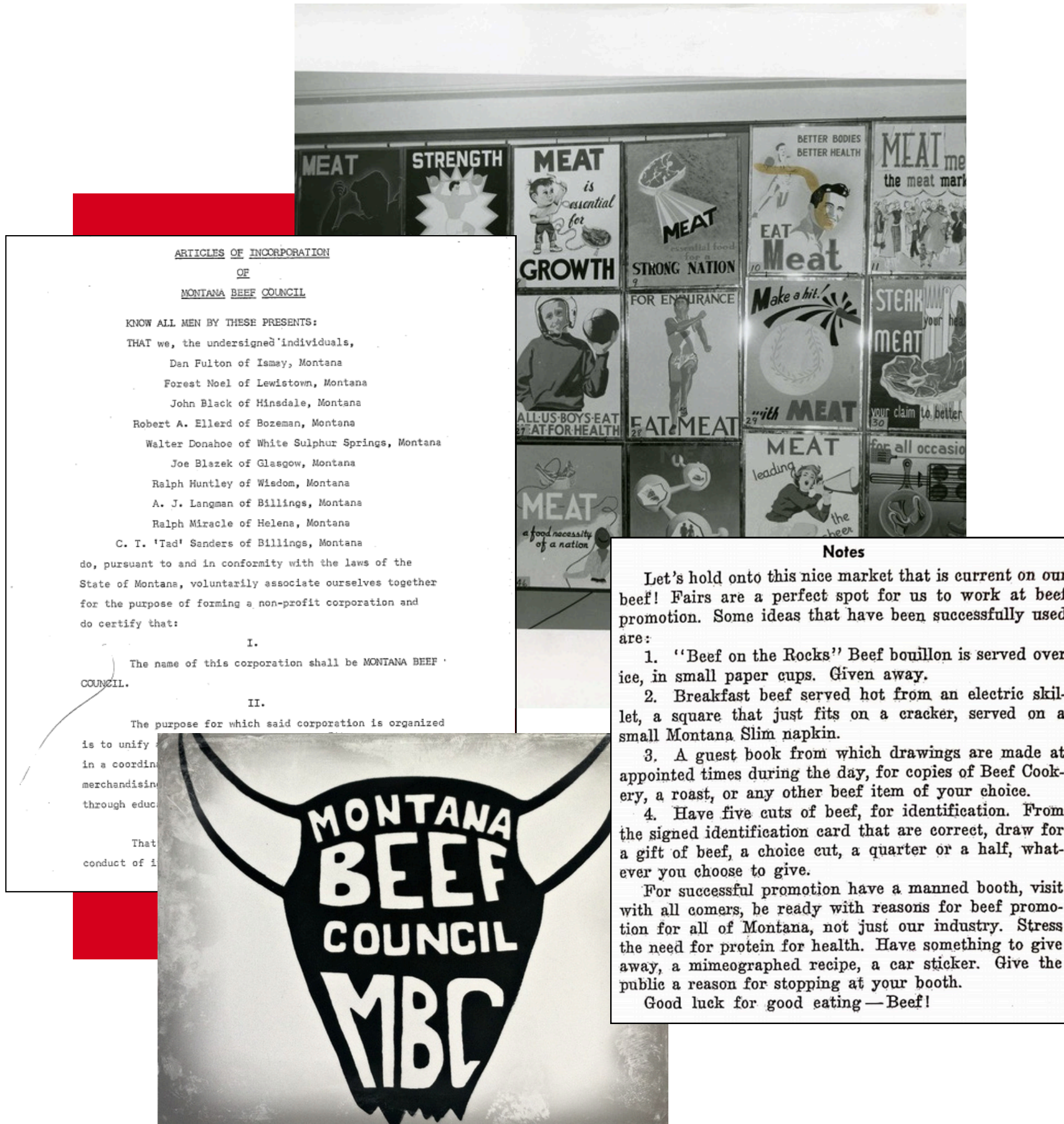
That's the work of the Montana Beef Council.





# Who We Are

## The Montana Beef Council



- Funded by the \$1-per-head Beef Checkoff (est. in 1986 under the 1985 Farm Bill).
  - 50¢ stays in Montana for programs directed by MBC Board.
  - 50¢ goes to the Cattlemen's Beef Board to fund national and international efforts.
- 12-member board representing 11 statewide agricultural organizations.
- Certified and audited by USDA Agricultural Marketing Service; governed by 7 CFR Part 1260.
- **Mission:** Enhance profit opportunities for Montana producers by increasing demand for beef and beef products.



## Beef Checkoff & MBC Outline

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# History of State Beef Councils

Alabama – 1962

Arizona – 1971

Arkansas – 1983

California – 1954

Colorado – 1965

Delaware – 1989

Florida – 1955

Georgia – 1976

Hawaii – 1988

Idaho – 1967

Illinois – 1963

Indiana – 1976

Iowa – 1970

Kansas – 1973

Kentucky – 1978

Louisiana – 1978

Maryland – 1986

Michigan – 1972

Minnesota – 1967

Mississippi – 1968

Missouri – 1986

Montana – 1954

Nebraska – 1970

Nevada – 1971

New Jersey – 1996

New Mexico – 1979

New York – 1986

North Carolina – 1986

North Dakota - 1973

Ohio – 1970

Oklahoma – 1975

Oregon – 1959

Pennsylvania – 1976

South Carolina – 1986

South Dakota – 1964

Tennessee – 1986

Texas – 1986

Utah – 1969

Vermont – 1986

Virginia – 1965

Washington – 1969

West Virginia – 1986

Wisconsin – 1986

Wyoming – 1971

Red = Created Prior to Mandatory Federal Checkoff

# The Early Years: Beef Promotion

- 53,000 printed matchbooks distributed and 35,000 placed on each Northwest Air dinner plate during summer tourist season featuring Montana Slim.
- 1,072,000 napkins boasting the value of beef distributed to Montana restaurants.
- 250,000 CornBelt and West Coast cattle feeders reached each month during fall shipping season advertising the virtues of Montana cattle.
- Request sent to all auto manufacturers asking increased use of genuine leather in upholstery of new model cars.



## MONTANANS BEEF UP THE YANKEES

Don't let the top hats fool you — they were recognized costume at the 75th annual MSGA convention in Miles City where Montana's three top cattle industry groups, the MSGA, the Montana Beef Council and the Montana Livestock Markets Association, recognized the unbelievable plight of the cellar-dwelling New York Yankees. The groups sent 50 choice breakfast BEEF STEAKS to the Yankees with the idea that the state's three organizations have kept Montana Beef in first place for many years and can do the same for Casey Stengel's Yankees. Pictured left to right, admiring the BEEF steaks are Joe Blazek, Glasgow, Bob Ellerd, Bozeman, Gene Etchart, Glasgow and Robin MacNab, Bozeman, representing the three organizations.

MONTANA MAKES **BEEF** MAKES MONTANA



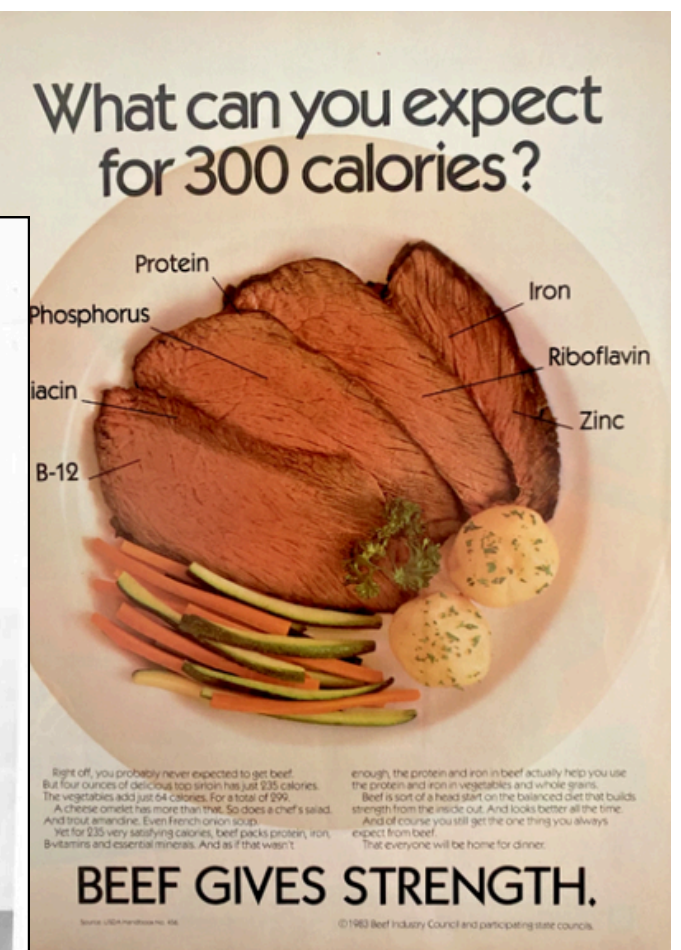
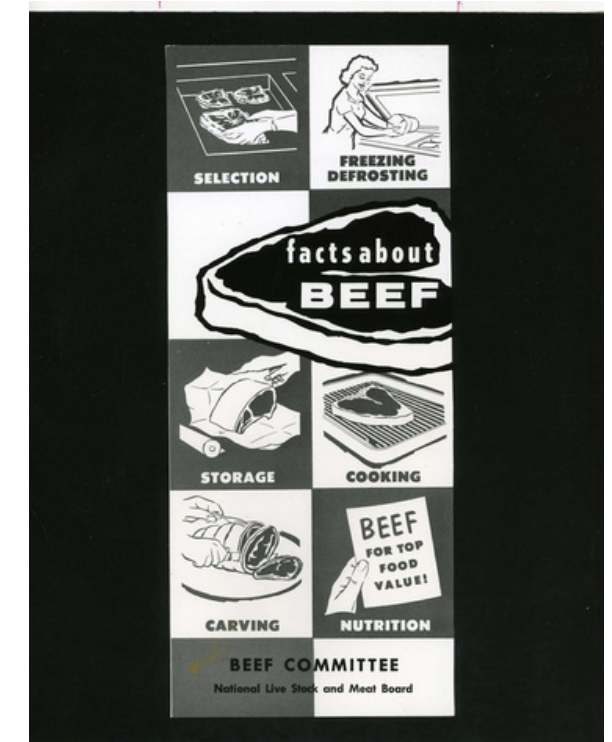


# Building Beef Demand 39 Years of Success

The Beef Checkoff is one of agriculture's greatest collaborative success stories –  
built by producers,  
led by producers,  
and accountable to producers.

Every local dollar is multiplied through collaboration.

**HEAT  
& SERVE**

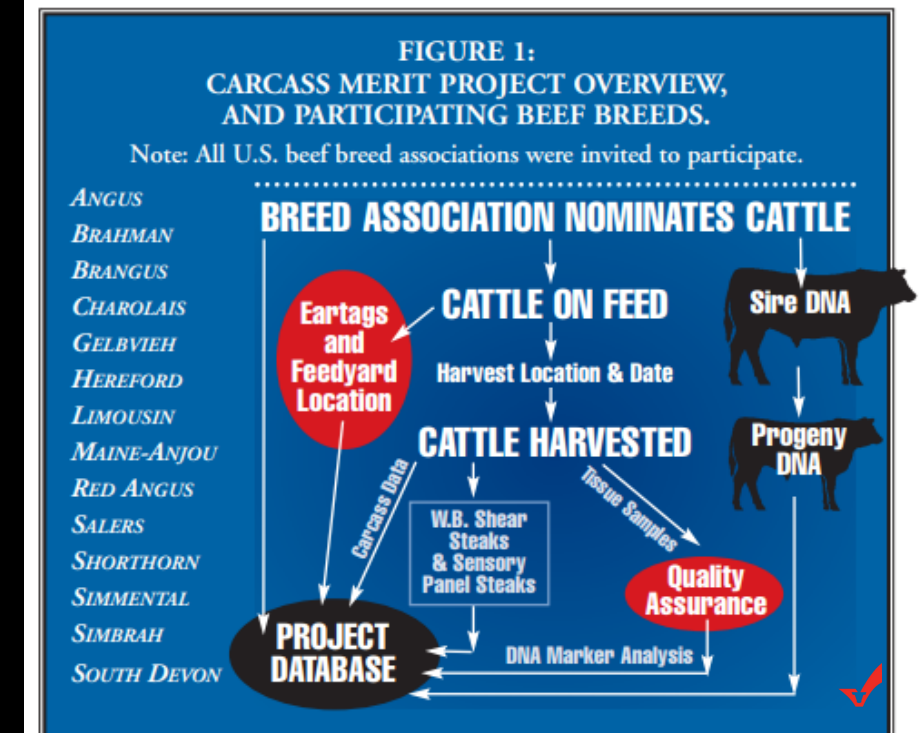




# A Legacy of Innovation & Impact Laying the Foundation

- **1986:** Beef Checkoff begins under 1985 Farm Bill.
- **1987:** Launch of “Beef: Real Food For Real People.”
- **1992:** Debut of the iconic “Beef. It’s What’s For Dinner.” campaign.
- **1994:** Checkoff-funded food safety research creates new pathogen controls that set industry standards.
- **Late 1990s:** Muscle profiling research identifies new steak cuts such as the Flat Iron and Petite Tender – adding \$50-\$70 per head in carcass value and over \$2 billion in new industry revenue.<sup>5</sup>

1980s  
–  
1990s





# Safety, Trust & Global Recovery

## 2000s

- **2003:** During the BSE crisis, Checkoff-funded issue response reassures consumers, preserving domestic demand.
- **2006:** U.S. Meat Export Federation's "We Care" campaign rebuilds Japanese trust, restoring beef sales to \$1.5 billion annually.



**THANKS TO YOUR CHECKOFF, CONSUMERS KNOW THAT BEEF IS WHAT'S FOR SUMMER.**

NO ONE EVER LEFT A COOKOUT WISHING THERE'D BEEN MORE

**MACARONI SALAD**

Beef has staked its claim on the summer's grilling season by blitzing consumers with the mouth-watering "Taste of America" summer grilling campaign. Your beef checkoff has also capitalized on the 100th anniversary of the hamburger through marketing promotions and partnerships, while reminding consumers how wholesome and flavorful beef is through public relations efforts and national TV, radio and print advertising. The timing couldn't be more crucial.

With key U.S. beef export markets currently closed due to BSE, it's the perfect time to push beef's strong value message to consumers. Your beef checkoff is supporting restaurant promotions, retail coupons, recipes and more, helping to keep beef on America's plates and grills all season long.

**YOUR BEEF CHECKOFF. BEEF**  
Investing in Beef Safety, Nutrition and Promotion.  
[www.beefboard.org](http://www.beefboard.org)

**Montana Beef Council**  
420 N. California Street • Helena, MT 59601 • 406/442-5111  
Brought to you by Montana beef producers through the beef checkoff program.

Due to BSE, message to restaurant ing to keep

**BEEF**  
IN.  
and.org



# Nutrition, Digital Reach, and Advocacy

- **2010:** Launch of Masters of Beef Advocacy (MBA) – now with 6,000+ graduates trained to share the modern beef story.
- **2012:** BOLD (Beef in an Optimal Lean Diet) study proves lean beef in a heart-healthy diet lowers LDL cholesterol.
- We dramatically expanded lean beef options to meet consumer demands. In 2000, only 9 cuts met USDA “lean” or “extra lean” standards –today, there are nearly 40.
- **2014–2017:** Checkoff partners with major retailers and platforms like Amazon Fresh and Arby’s, boosting beef sales and visibility.

# 2010s



**BOLD** Eating Lean Beef Daily Can Help Lower Cholesterol As Part of a Heart-Healthy Diet

The latest research on heart health and lean beef presents a new way of thinking: lean beef can be part of a solution to one of America's greatest health challenges. A study published in the *American Journal of Clinical Nutrition* demonstrated that a diet including lean beef every day is as effective in lowering total and LDL “bad” cholesterol as the gold standard heart-healthy diet (DASH, Dietary Approaches to Stop Hypertension).<sup>1</sup>

The Beef in an Optimal Lean Diet (BOLD) clinical study (Effects on Lipids, Lipoproteins and Apolipoproteins), conducted by The Pennsylvania State University researchers, evaluated adults with moderately elevated cholesterol levels, measuring the impact of diets including varying amounts of lean beef on total and LDL cholesterol levels. Study participants experienced a 10 percent decrease in LDL cholesterol compared to baseline in two different beef diets. The BOLD diet contained 4.0 oz. of lean beef and the BOLD-PLUS diet contained 5.4 oz. (weights before cooking) of lean beef daily with both diets providing less than 7% of calories from saturated fat. After five weeks, there were significant reductions in total and LDL cholesterol.<sup>1</sup> Many of the BOLD and BOLD-PLUS diet menu plans incorporated recipes from *The Healthy Beef Cookbook*.

The study used rigorously designed research—a Randomized Controlled Clinical Intervention Trial—to investigate the effects of cholesterol-lowering diets with varying amounts of lean beef. In this study, 36 participants (adults ages 30-65 with moderately elevated cholesterol) were randomly assigned to a treatment order and in a cross-over design, consumed a total of four diets (BOLD, BOLD-PLUS, DASH and Healthy American Diet (HAD)) as control) for five weeks each.

The BOLD study is the latest addition to a body of evidence that supports including lean beef in a heart-healthy diet. To learn more about this study, please visit [BeefNutrition.org](http://BeefNutrition.org).

**Nutritional Breakdown of Study Diets**

	HAD	DASH	BOLD	BOLD-PLUS
Calories	2,297 kcal	2,106 kcal	2,100 kcal	2,104 kcal
Protein (% of total calories)	17%	18%	19%	27%
Carbohydrate (% of total calories)	50%	55%	54%	45%
Fat (% of total calories)	33%	27%	28%	28%
Saturated Fat (% of total calories)	12%	6%	6%	6%
Monounsaturated Fat (% of total calories)	11%	9%	11%	12%
Polysaturated Fat (% of total calories)	7%	8%	7%	7%
Lean Beef (oz./day)	0.7	1.0	4.0	5.4

\*Weights before cooking

**Healthy American Diet (HAD):**  
Control diet, included more refined grains, full-fat dairy products, oil and butter to reflect current American dietary habits.

**Dietary Approaches to Stop Hypertension (DASH):**  
Considered the “gold standard” heart-healthy diet, this eating plan featured vegetables, fruits and low-fat dairy and limited red meat and sweets.

**Beef in an Optimal Lean Diet (BOLD):**  
Similar to the DASH diet (rich in vegetables, fruits, whole grains, nuts and beans) and protein amount, but used lean beef (4 oz./day) as the primary protein source, whereas the DASH diet used primarily white meat and plant protein sources.

**Beef in an Optimal Lean Diet Plus (BOLD-PLUS):**  
Similar to the BOLD diet, but with higher protein and lean beef intake (5.4 oz./day).





# Data-Driven Demand & Resilience 2020s

- Checkoff contractors pivot quickly during the pandemic, driving record retail beef demand – total meat sales volume at retail climb 10% and total dollar sales at retail rise 18%, even as restaurants close.<sup>6</sup>
- The U.S. Dietary Guidelines formally include beef as a recommended complementary food for infants and toddlers.
- Sustainability research highlights that U.S. producers now raise 66% more beef per animal with fewer resources, strengthening global confidence in beef's environmental efficiency.<sup>7</sup>



**Experts Recommend 1-2 Ounces/Day of  
Animal-Based Foods Such as Beef.\***



**Around 6 months**  
Pureed Beef

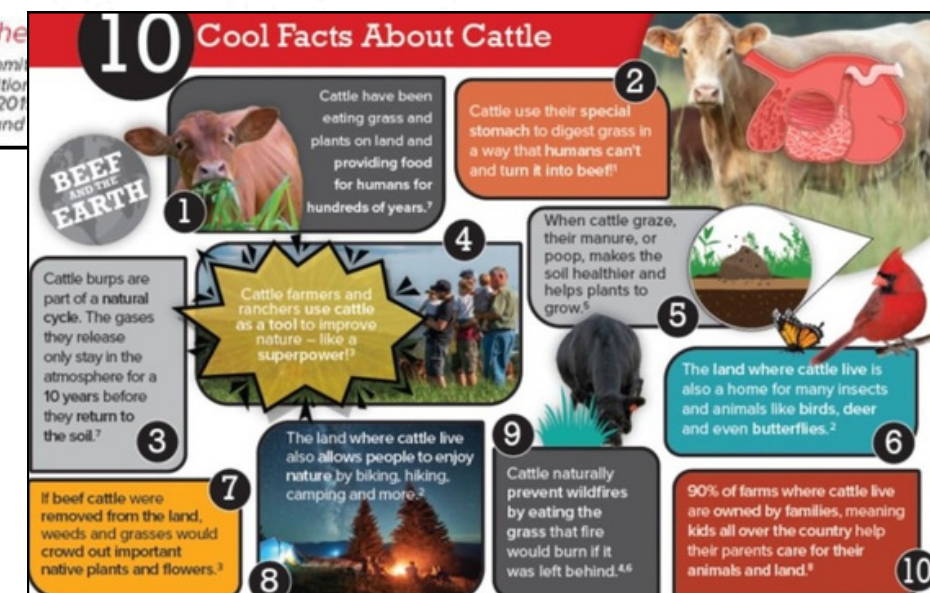


**6-8 months**  
Ground Beef



**8-10 months**  
Stewed Beef

*Preparation depends on the  
\* American Academy of Pediatrics Committee  
Food and Nutrition Service. Infant Nutrition  
Infants, and Children (WIC) [FNS-826]. 2011  
Report to the Secretary of Agriculture and*



**BEEF**  
IT'S WHAT'S FOR DINNER®  
Funded by Beef Farmers and Ranchers



# Boosting Demand & ROI 2022-2025

- Checkoff-funded retail and digital marketing deliver a \$31:1 sales impact, drawing 26% new beef buyers across e-commerce and in-store promotions.
- Expanded food safety, sustainability, and nutrition research continue reinforcing consumer trust and scientific credibility.
- The latest independent ROI study (Cornell University, 2024) confirms the Checkoff **returns \$13.41 for every \$1 invested** – a 1,241% ROI.

The image shows the cover of a report titled "NATIONAL BEEF CHECKOFF 2024 RETURN ON INVESTMENT & BROADER ECONOMIC IMPACT STUDIES". At the top is the BEEF logo with a red checkmark and the text "Funded by the Beef Checkoff". The title is in large, bold, red and white letters. Below the title, there is a red-bordered box containing three bullet points. To the right of the box are two small images: one of a beef dish and another of a beef dish. Below the box are three small images: a man in a hat talking to a group, a group of people in blue shirts, and a woman in a green shirt working with a cow. At the bottom, the text reads "AN INDEPENDENT ECONOMIC ANALYSIS OF THE NATIONAL BEEF CHECKOFF PROGRAM FOR THE MOST RECENT FIVE-YEAR PERIOD".

**BEEF**  
Funded by the Beef Checkoff

## NATIONAL BEEF CHECKOFF 2024 RETURN ON INVESTMENT & BROADER ECONOMIC IMPACT STUDIES

- Total domestic beef demand would have been 2.4 billion pounds (8.5%) lower per year than actual results.
- The steer price would have been 7.8% lower per year than actual results.
- U.S. export beef demand would have been 372 million pounds (11.5%) lower than actual results in the seven major importing countries included in the study.

AN INDEPENDENT ECONOMIC ANALYSIS OF THE NATIONAL BEEF CHECKOFF PROGRAM  
FOR THE MOST RECENT FIVE-YEAR PERIOD

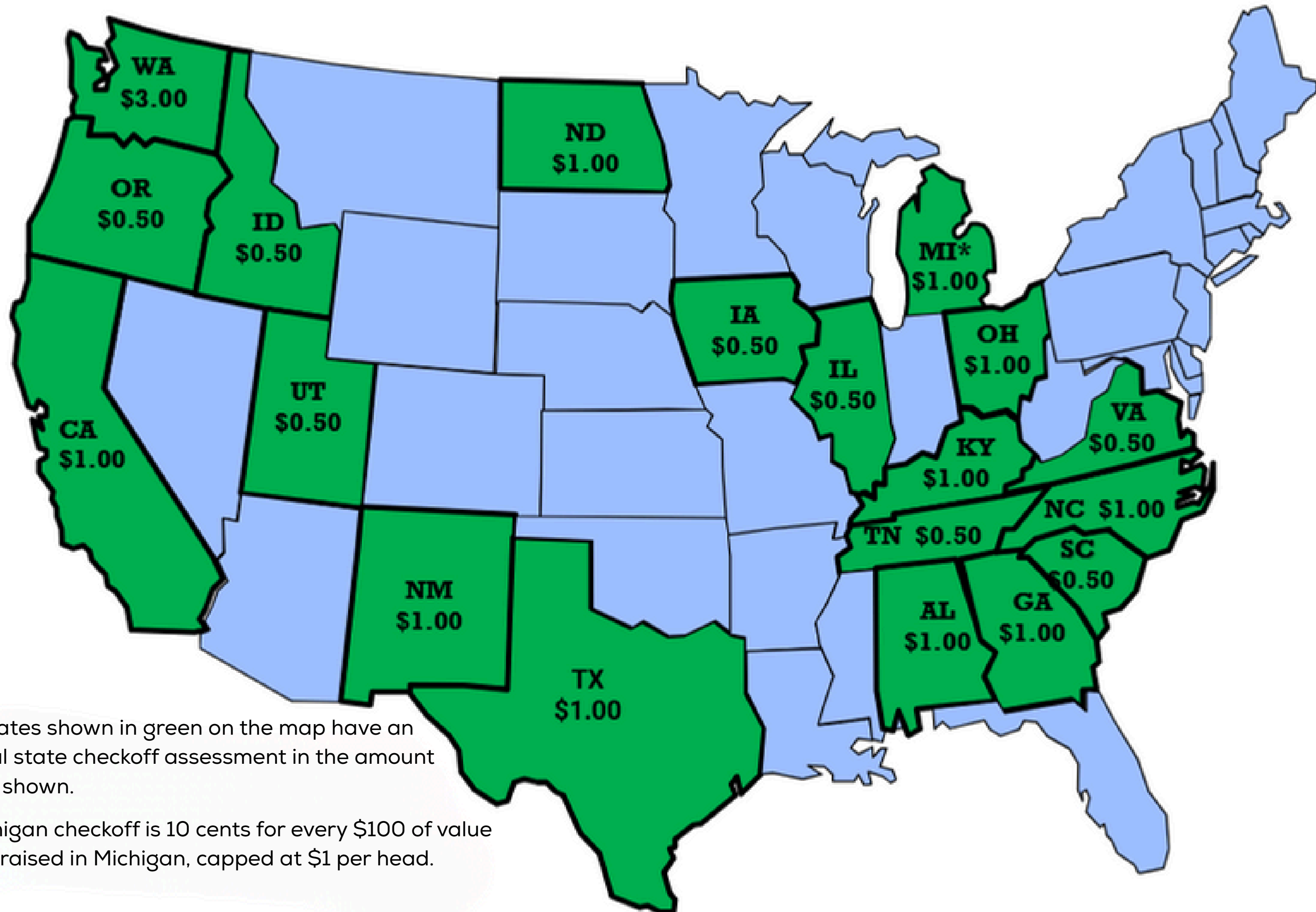


# The Value of the Checkoff Dollar

- A 1985 dollar has the same purchasing power as \$3.01 today, or a 201% increase.<sup>14</sup>
- Cattle are sold less times now = less Beef Checkoff collected compared to 1980s.
- A smaller cow herd = less Beef Checkoff collected.
- Every cost of ranching has increased severalfold – except the marketing dollar we use to promote beef.
- Yet, through partnerships, the checkoff **remains efficient and impactful.**
- Our producers have done more with the same dollar – and the results speak for themselves.

Item	Average Cost in 1986	Average Cost in 2025	Percent Increase
Gallon of Gas <sup>8</sup>	\$0.89	\$3.15	254%
Pound of Ground Beef <sup>9</sup>	\$1.29	\$6.12	375%
Movie Ticket <sup>10</sup>	\$3.71	\$16.08	333%
Average Rent <sup>11</sup>	\$385	\$1,711	344%
Base cost of a half-ton pickup truck <sup>12</sup>	\$10,677	\$37,845	254%
Average Home Price <sup>13</sup>	\$89,430	\$416,900	366%
Beef Checkoff Assessment	\$1 per head	\$1 per head	0%

## States with an additional state-based checkoff or assessment.

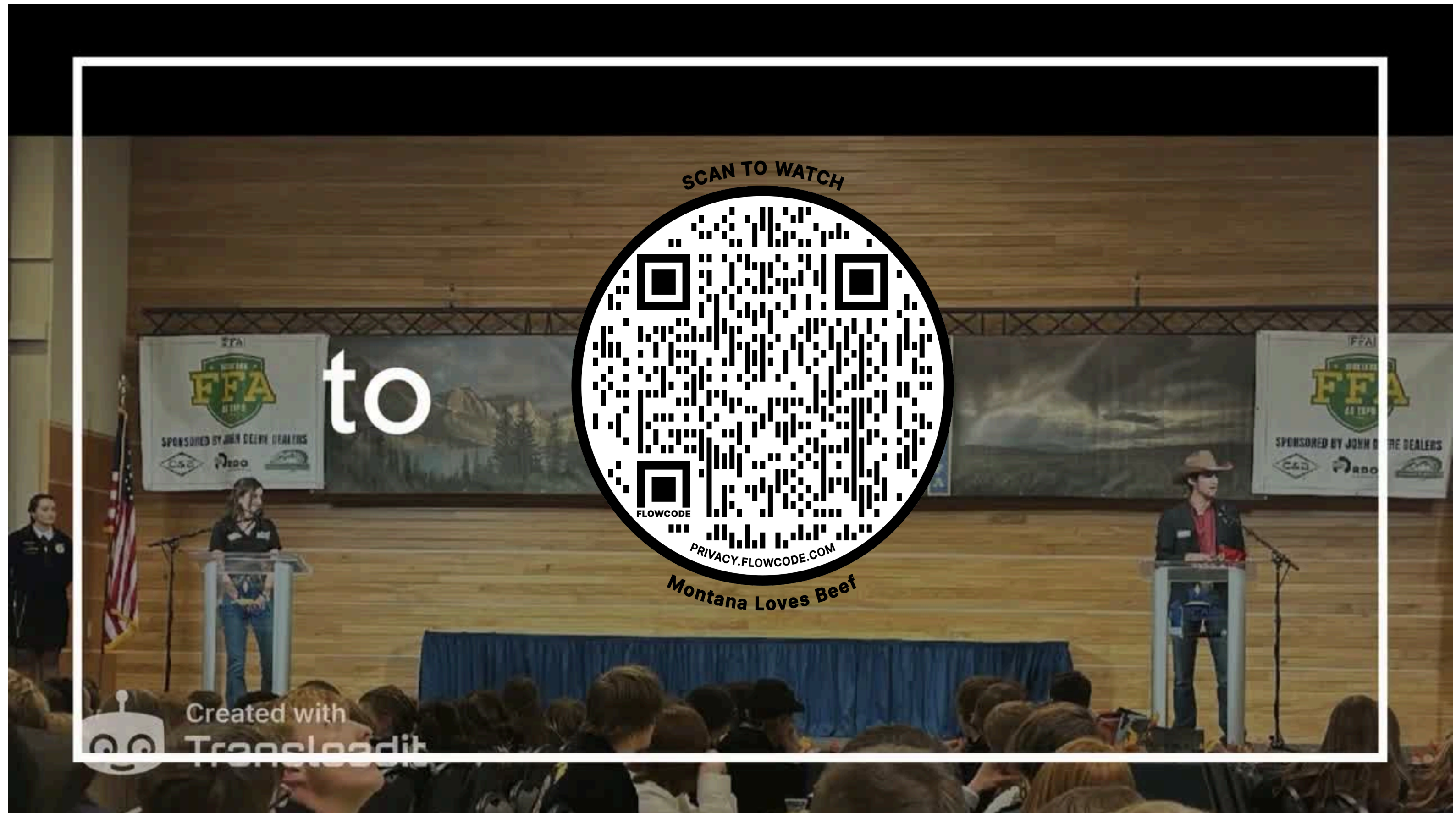


The 19 states shown in green on the map have an additional state checkoff assessment in the amount per head shown.

\*The Michigan checkoff is 10 cents for every \$100 of value on cattle raised in Michigan, capped at \$1 per head.



# Doing More with the Same Dollar





# Montana Programs in Action

## Promotion:

- Montana High School Association “Preferred Protein” partnership, Beef for Backpacks, Wendy’s Montana campaign, MTN Network, and community events.

## Consumer Education:

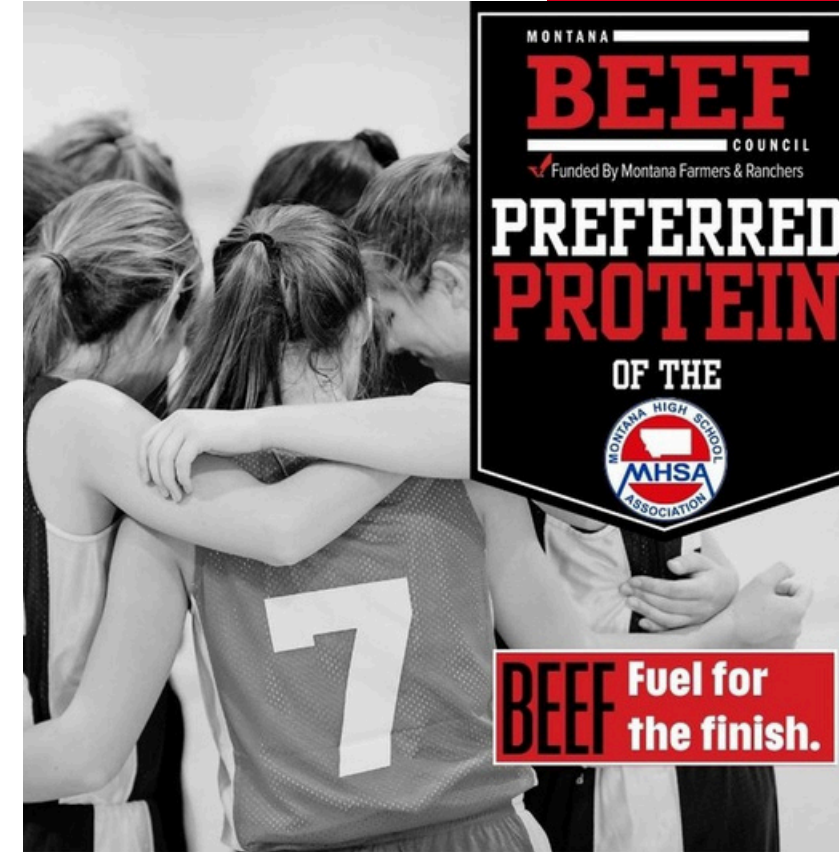
- FCS teacher grants, Team Beef Montana, School Nutrition outreach, dietetic intern tours, and youth education.

## Global Marketing:

- Montana representation in U.S. Meat Export Federation, promoting American beef in over 80 markets worldwide.

## Producer Communication:

- Radio outreach, annual reports, BQA training, and sustainability messaging.





- Though smaller in scale than national campaigns, MBC remains a vital force for beef promotion and education in Montana. Amid countless consumer messages, **beef advertising continues to stand out.**
- With **25g of protein per serving and one natural ingredient**, beef’s value underscores the need for continued marketing to sustain demand and support Montana ranchers.

**Fiscal Year 2024 REVENUE**

Checkoff Assessments _____	\$1,492,132
MT Cattle Sold in Other States _____	\$130,379
Less Cattlemen’s Beef Board Remittance _____	(\$801,413)
Less Other State’s Cattle Sold in MT _____	(\$9,541)
Net Assessments _____	\$811,557
Interest Income _____	\$91,861
<b>Net In-State Revenue _____</b>	<b>\$903,418</b>

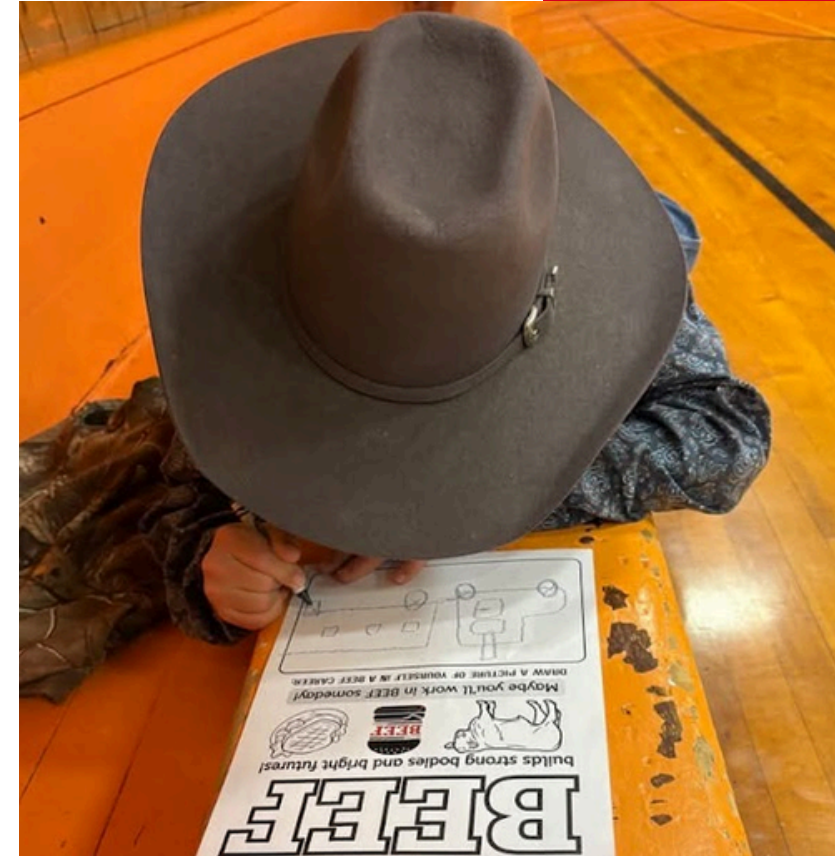
**Fiscal Year 2024 EXPENSES**

Promotion _____	\$180,709
Consumer Information _____	\$75,581
Industry Information _____	\$37,729
International Marketing _____	\$146,465
Domestic Marketing _____	\$161,029
Producer Communication _____	\$102,909
Administration _____	\$162,522
Collection & Compliance _____	\$148,121
<b>Total Expense _____</b>	<b>\$1,015,065</b>



# Key Takeaways

- Producers built this program – not through taxes, but through self-investment.
- Nearly 40 years of checkoff results show measurable returns in safety, quality, and demand.
- Montana Beef Council focuses on accountability and impact – multiplying local dollars through state, national, and international collaboration.
- Partnership and innovation are the best paths to strengthen beef promotion moving forward.





# THANK YOU!



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# Sources:

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