



2026 BIF RESEARCH SYMPOSIUM & CONVENTION



BIF
BIF 2026
JUNE 1-4 • BOISE, IDAHO

University of Idaho
Idaho Cattle Association

Windy Hill
MEADOWS

A Better Beef Program | Genetics for Improving Pasture to Plate



5/25/2026

About Me: From Pig Scientist/CEO to 1st Gen Beef Producer



My Past



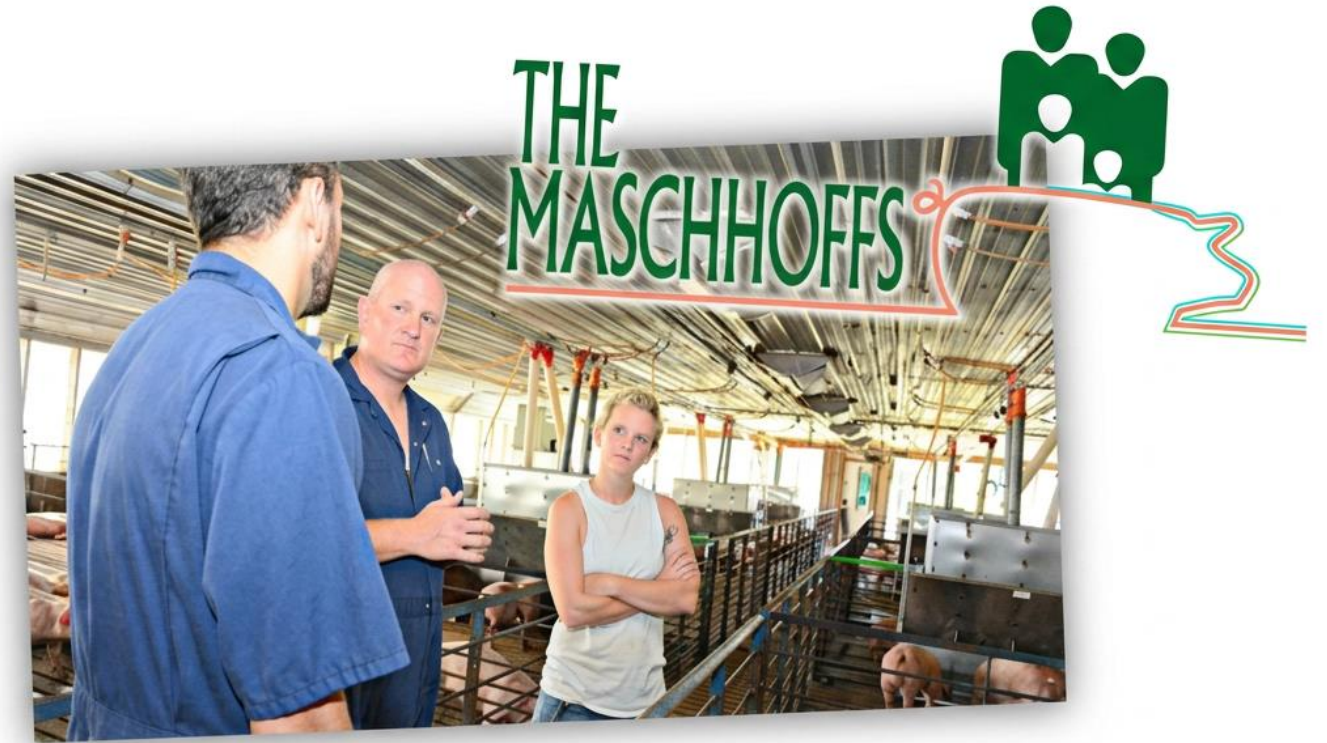
**My Future
& Passion**

Windy Hill
MEADOWS



My Start: *Pork Scientist & Production*

- Training in Pig Management System
- Designed Applied Research & Development Program
- Created Proprietary Genetic Improvement Program
- Leadership of Coordinated Pork Production System



2013 Master of the Pork Industry Bradley Wolter

From an early age, this swine enthusiast has been focused on better pig-raising methods.



My Future & Passion:

1st Gen Beef Producer & Genetic/Systems Resource

- Youth Program Initiated
- Consumer-Focused Beef Goal
- Created Angus-Based Genetic Improvement Program
- Cow Leasing Model Used to Scale Production
- Measuring and Monitoring System Outcomes



A Brief Look at the Market

The U.S. plate is a **four-way fight** — and beef is **losing ground on a volume basis**

117 → 57

Beef per-capita lbs, 1974 peak vs. 2026 USDA forecast — a 51% decline.

+102 lbs

U.S. chicken per-capita consumption — passed beef in 2010, still climbing.

-18%

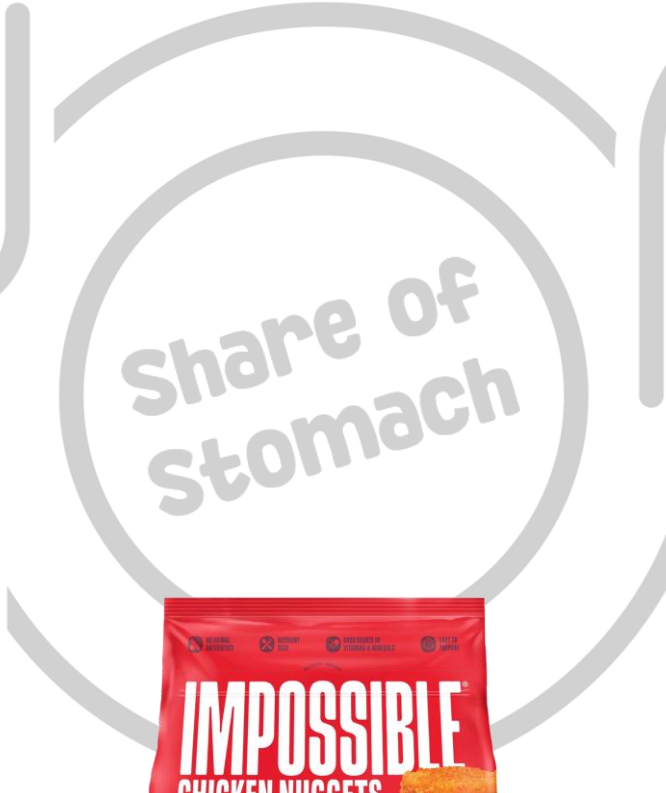
Beyond Meat Q1 2024 revenue YoY — plant-based momentum reversing.



Source: USDA ERS Livestock, Dairy & Poultry Outlook (2024–2026); Beyond Meat 10-Q (Q1 2024).

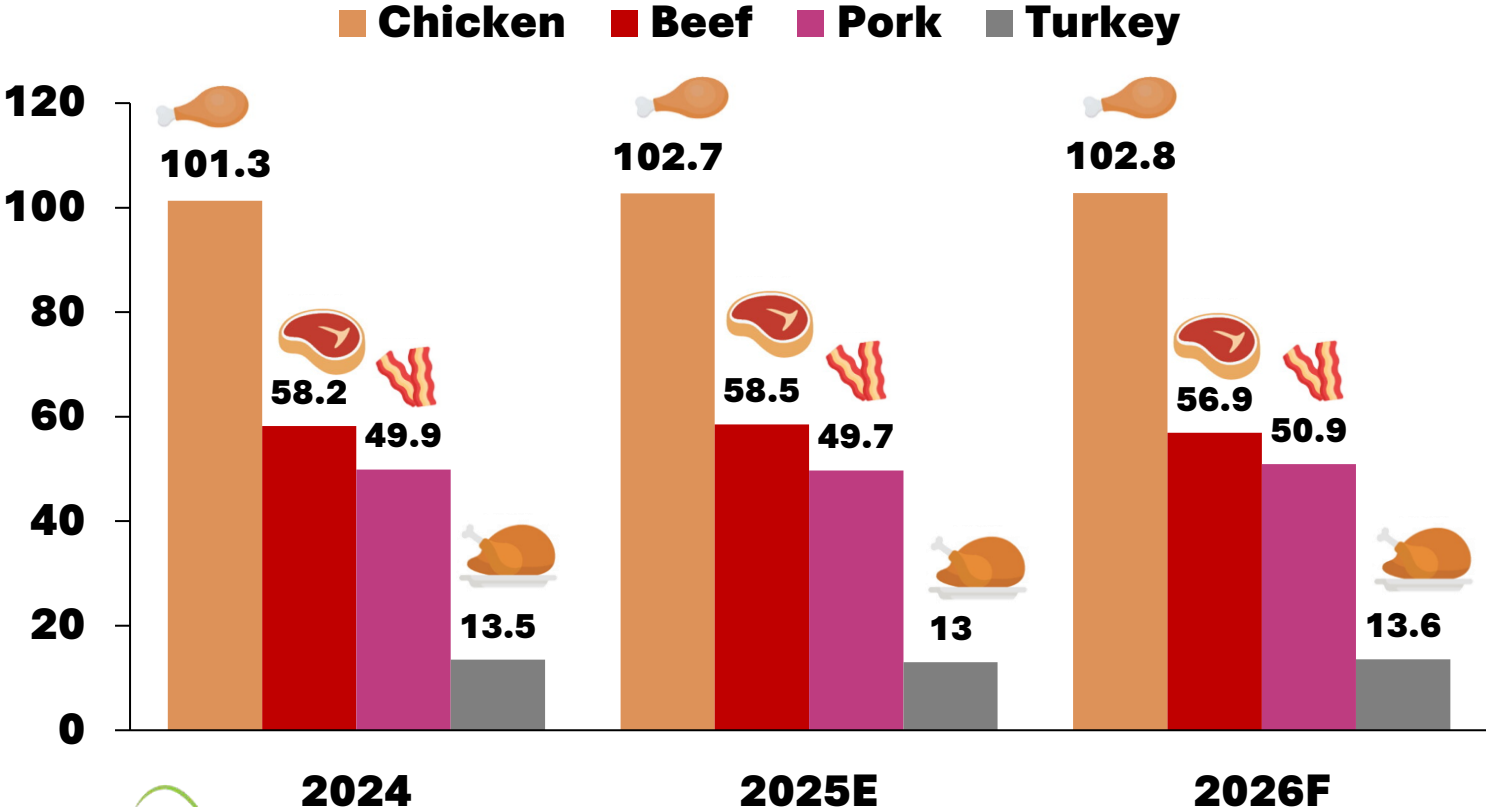


Chicken and Pork Grabbing Volume & Share of Stomach



Chicken winning the volume war; beef commanding the value premium

U.S. per-capita consumption (lbs, retail weight)



Chicken: scale leader

~103 lbs/cap and rising — passed beef in 2010 and never looked back.

Beef: contracting

58 → 57 lbs/cap; herd in 10-year contraction cycle. Supply-driven.

Pork: flat domestic, export beast

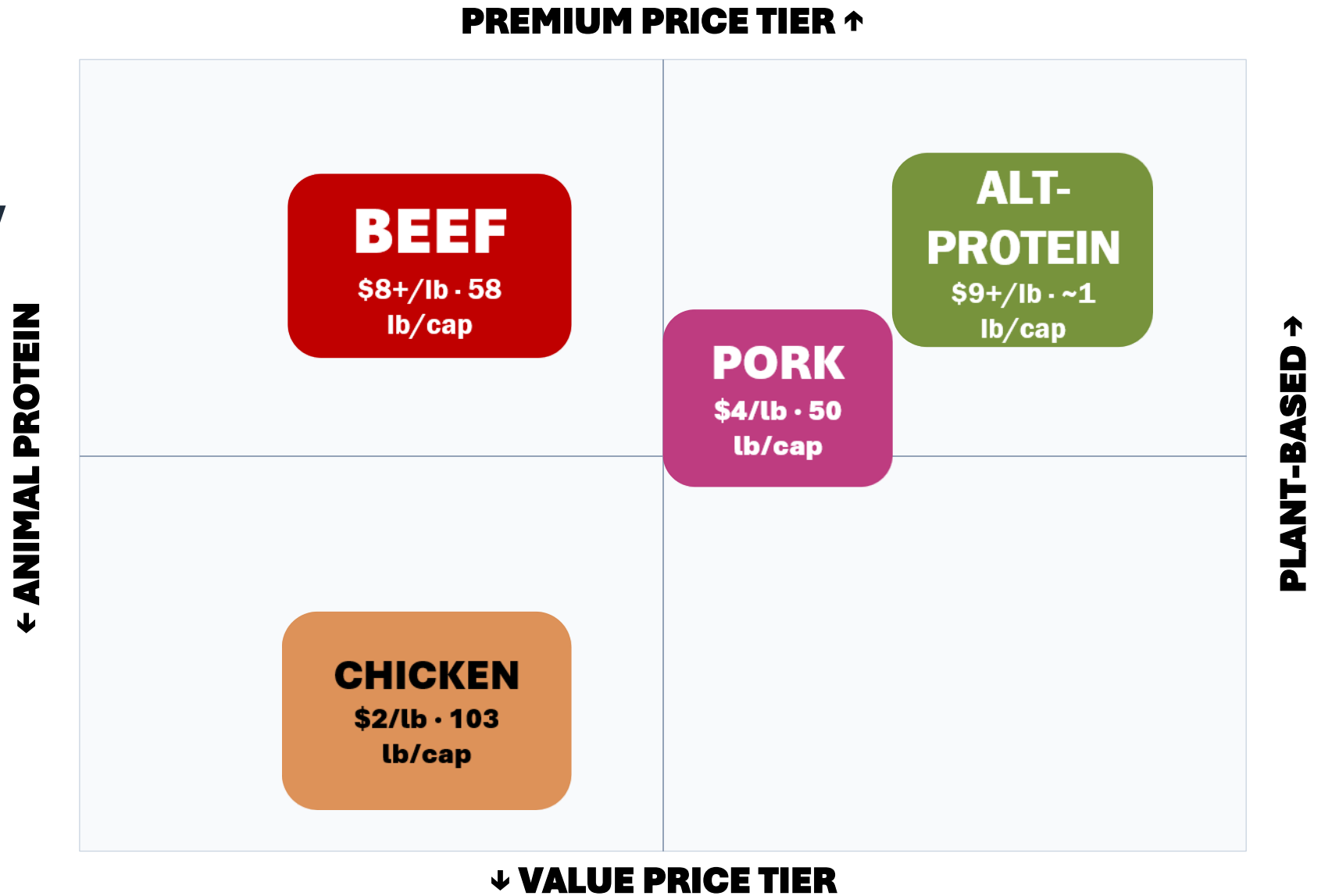
U.S. set to pass EU as #1 pork exporter in 2025.



Source: USDA Economic Research Service, Livestock, Dairy, and Poultry Outlook (Aug 2025). 2025E and 2026F are USDA projections.



Beef sits alone in premium- animal territory



Beef: premium-priced, supply-constrained, cyclically tight

U.S. PRODUCTION (2024)

27.0B

lbs commercial beef

PER-CAPITA AVAILABILITY

58.2 lb

2024 → 56.9 lb by 2026

BEEF EXPORTS (2025E)

2.71B

lbs — 8-year low

CATTLE CYCLE

Year 11

of typical 10-yr cycle

RETAIL PRICE INDEX

+24%

vs. 2019 baseline

SHARE OF U.S. MEAT \$

~50%

value share vs ~25% volume

WHAT THE DATA SAYS

- Herd contraction continues through 2025 — the smallest U.S. cow herd since 1961 sets a hard ceiling on supply
- Despite ~25% of meat volume, beef captures ~50% of U.S. meat dollars — the premium tier of the four-protein plate
- Genetic gains, not volume gains, will define the next decade — quality and efficiency, not headcount



Where each protein is winning – and where it’s exposed

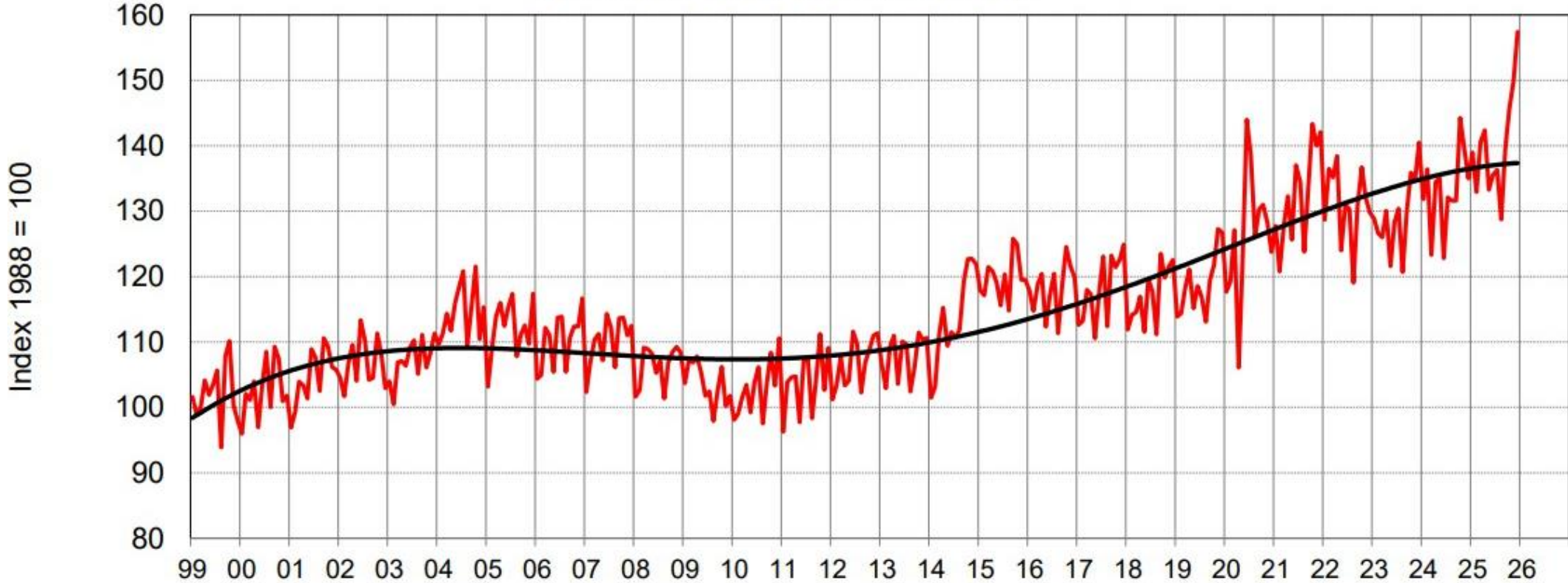
BEEF	PORK	CHICKEN	ALT-PROTEIN
<p>STRENGTHS</p> <ul style="list-style-type: none"> • Premium occasion + taste loyalty • Tight herd supports price discipline • Strong export demand recovery 	<p>STRENGTHS</p> <ul style="list-style-type: none"> • Export-led growth: #1 exporter 2025 • Versatile cuts, broad price tiers • Improving feed efficiency 	<p>STRENGTHS</p> <ul style="list-style-type: none"> • 103 lbs/cap and still growing • Lowest \$/lb in retail meat case • Health-halo with consumers 	<p>STRENGTHS</p> <ul style="list-style-type: none"> • ESG/climate narrative • Foodservice partnership reach • Premium retail price point
<p>VULNERABILITIES</p> <ul style="list-style-type: none"> • Per-cap consumption - 51% since 1974 • Long cycle, slow supply response • Sustainability narrative pressure 	<p>VULNERABILITIES</p> <ul style="list-style-type: none"> • Domestic per-cap demand flat • China/Mexico exposure • Bacon-led growth concentrated 	<p>VULNERABILITIES</p> <ul style="list-style-type: none"> • HPAI outbreak risk • Margin pressure from feed costs • Commodity, limited premium tier 	<p>VULNERABILITIES</p> <ul style="list-style-type: none"> • Volume -16% YoY (Beyond 2024) • Gross margins mid-teens • Repeat purchase weakness

Sources: USDA ERS Livestock Outlook (2025); Beyond Meat 10-Q/10-K (2024); industry analyst commentary.



BEEF Demand Drives Opportunity

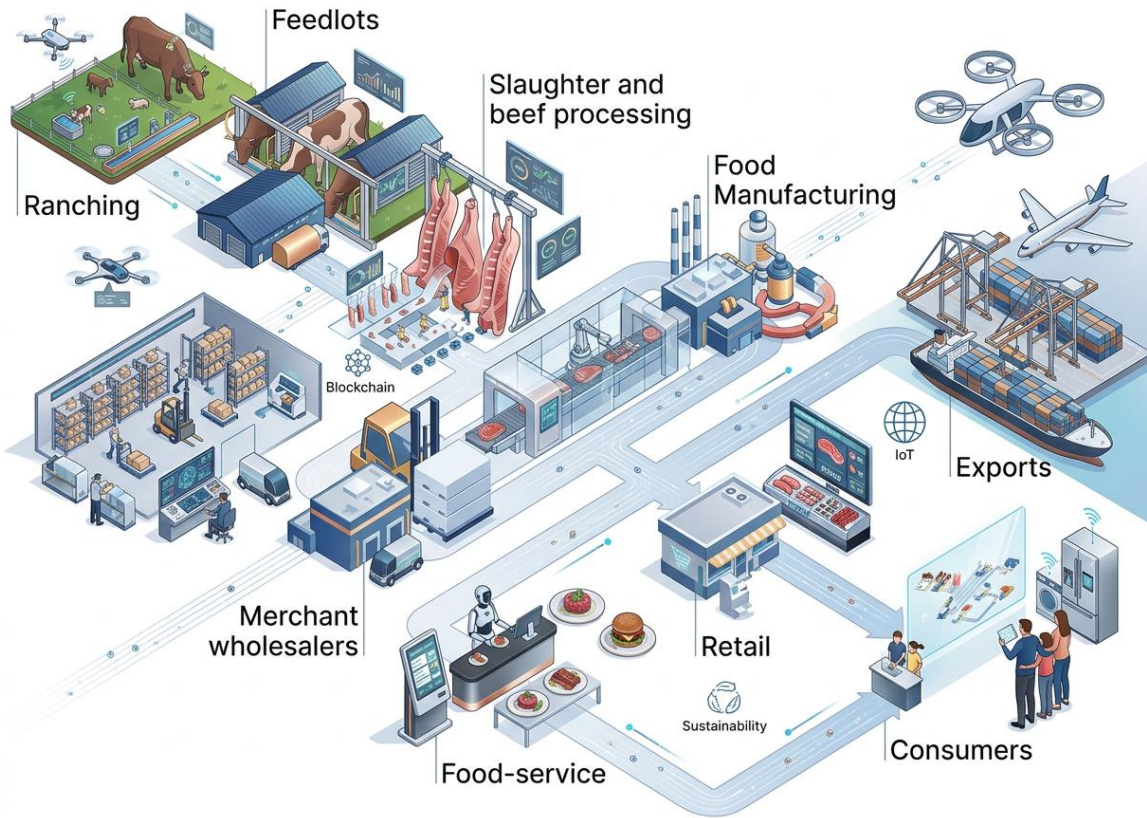
All-Fresh Beef Demand Index



Source: Terrain using data from USDA ERS, NASS, and FAS



What is it about the **BEEF** Experience?



Consumer Experience



- ✓ Price
- ✓ Safety
- ✓ Quality
- ✓ Taste & Flavor
- ✓ Animal Wellbeing
- ✓ Environmental Impact



Beef Sets the Pace in Terms of Diversity *(variety, versatility, flavor)*

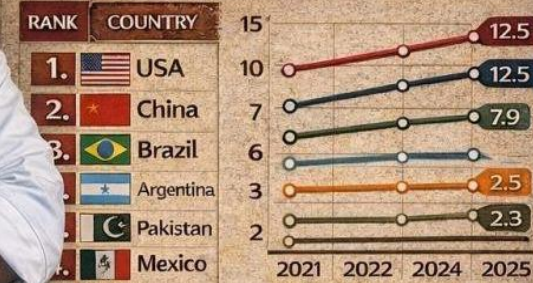


Global Beef Consumption Trends: 2021-2025

Total Beef Consumed & Per Person Consumption (kg/year)



Top Beef Consuming Countries (2021-2025)



Total Beef Consumption (Million Tones)



Top Beef Consumption (2021-2025)



CHEF ANIKET KADAM
 Chef & Food Entrepreneur |
 Continental & American Cuisine

Instagram: @i_m_aniket1



5/25/2026

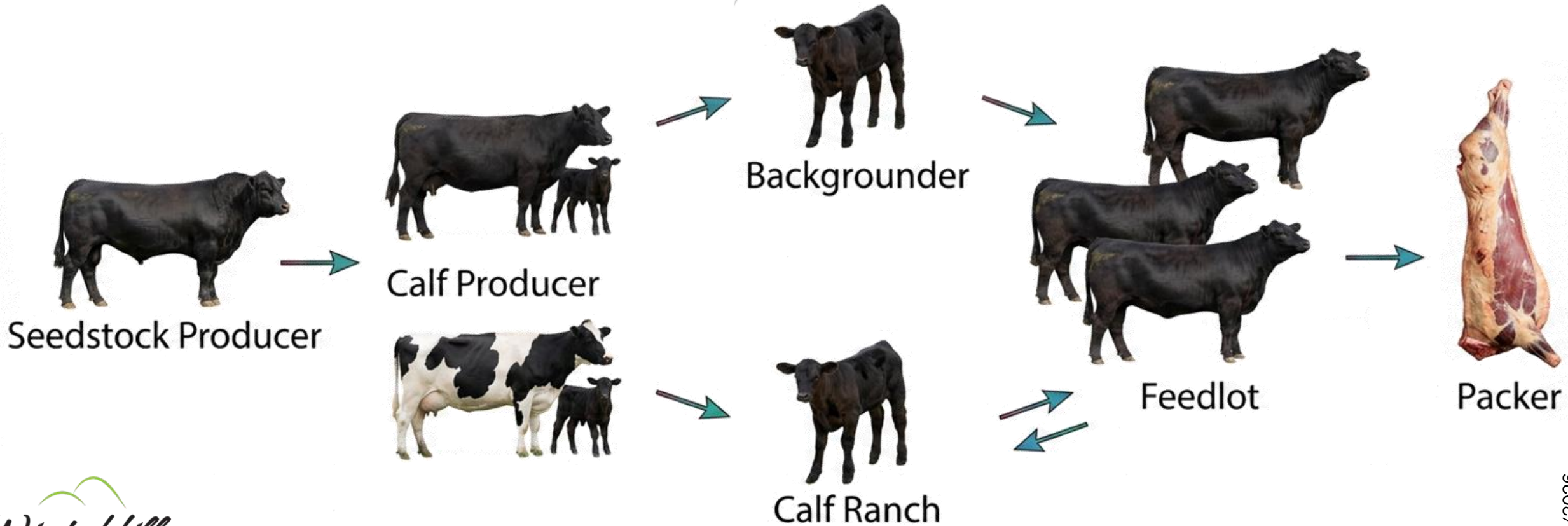


Leverage Systems-Based Production Advantage

Fragmented, Uncoordinated

VS

Holistic, Coordinated



Leverage Systems-Based Production Advantage

Fragmented, Uncoordinated



Holistic, Coordinated

- ✓ Consistency of delivery of consumer attributes?
- ✓ Opportunity for value creation and allocation?
- ✓ Potential for risk management strategies?
- ✓ Creates biologic synergies for gaining efficiency?
- ✓ Innovates outcomes with pace of technology?



How do we want Herd Rebuild to LOOK?

How *many* do we need?

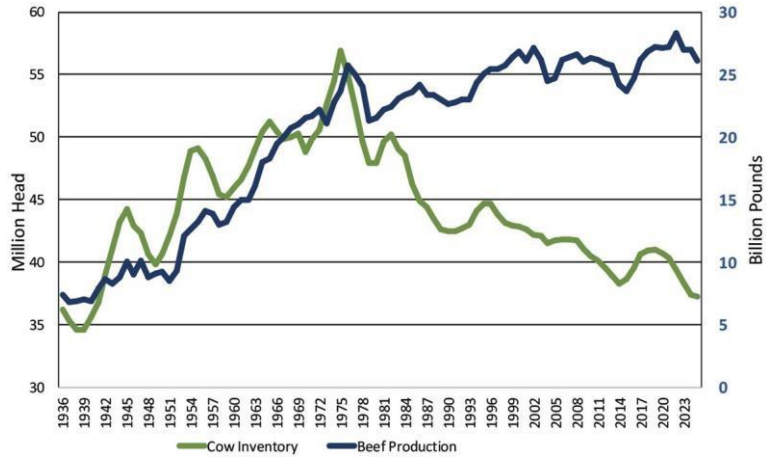
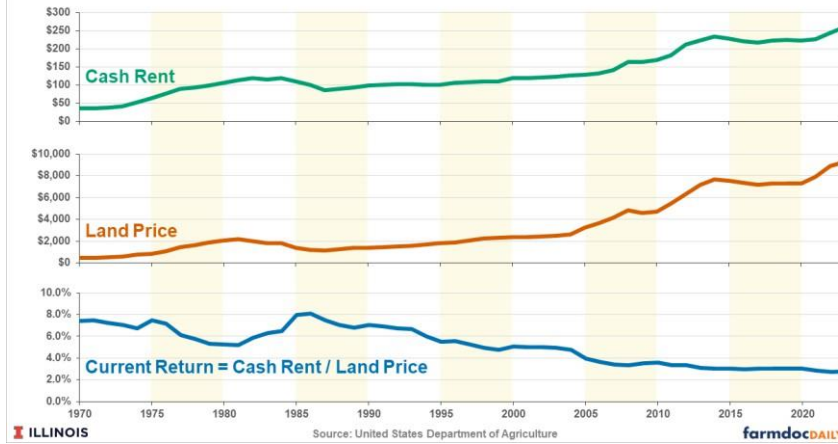


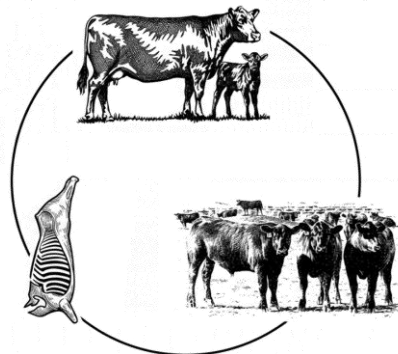
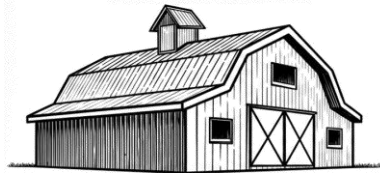
Figure 1. Illinois Cash Rent, Land Value, and Current Return, 1970 to 2023



What *environment* will we rear them in?

What *measurements* are we taking/using?

What *attributes* do they need to have?



Carcass Performance Targets

875 lbs
(12 to 14 months of age)

2
Yield Grade

High Choice
Quality Grade

Growing Animal Performance Targets

Pre-Weaning (Nursing)	Post-Weaning (Feedlot)
725 lbs 205-Day Body Weight	1,325 lbs 365-Day Body Weight
3.1 lbs/day Avg. Daily Gain	3.75 lbs/day Avg. Daily Gain
10 Weeks of Age Creep Consumption	5:1 Dry Matter Feed Conversion Ratio

Breeding Animal Performance Targets

1,450 lbs
Mature weight

6.2
Frame size

5.5
Body condition score

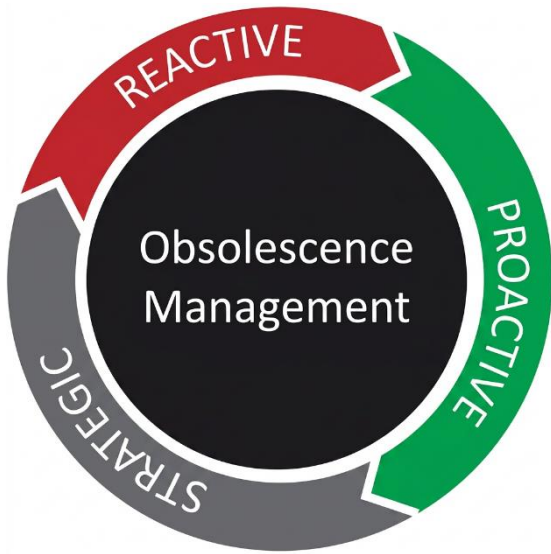
Calve
On 365-day interval (60-day season)

8
Lifetime calf production



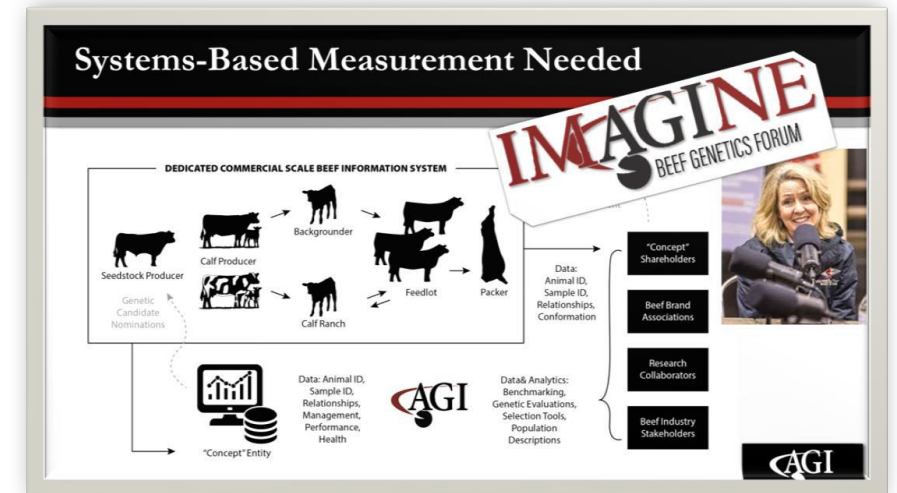
Future System for Genetic Change?

- Beef Improvement Federation
- USDA
- Land Grant Universities
- Breed Associations
- Animal Breeding and Multiplication Farms
- Breeding Companies
- Bio-Tech Companies
- Genetic Dissemination and Services Infrastructure



A Case for Beef Genetic Research Investment

~ T. Rowen & B.F. Wolter



Young Producers Will Shape the Future



Illinois Junior Beef Association

A Better Beef Program | Genetics for Improving Pasture to Plate



5/25/2026



Young Producers Will Shape the Future

- **Promote** *with purpose*
- **Plan** *with the customer as the outcome*
- **Prognostic** *with measurement*
- **Progress** *through creative collaboration*
- **Partner** *with aligned values*
- **Profit** *for risk taken*



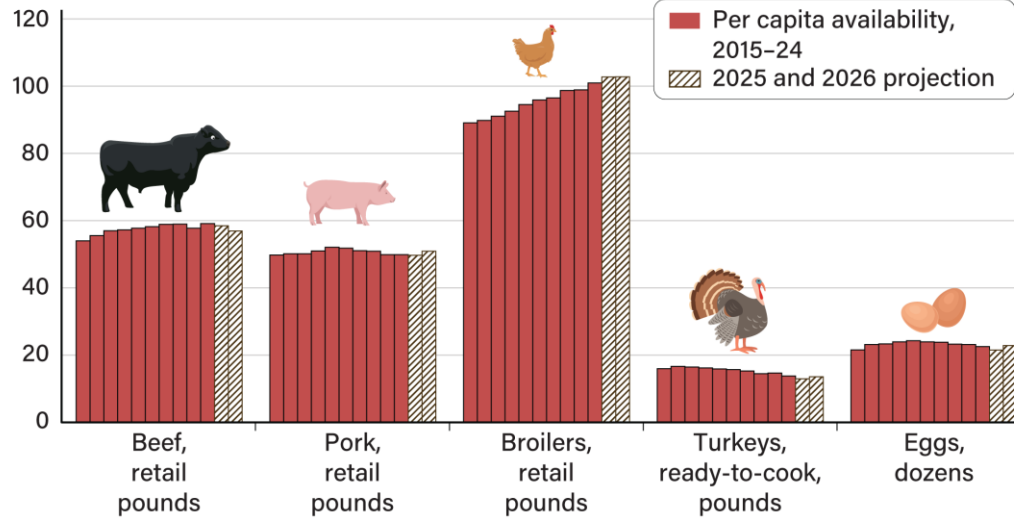
Illinois Junior Beef Association



Annual per capita availability of beef, pork, broilers, turkeys, and eggs, 2015-26

USDA Economic Research Service
U.S. DEPARTMENT OF AGRICULTURE

Pounds (beef, pork, broilers, turkeys)
Dozens (eggs)



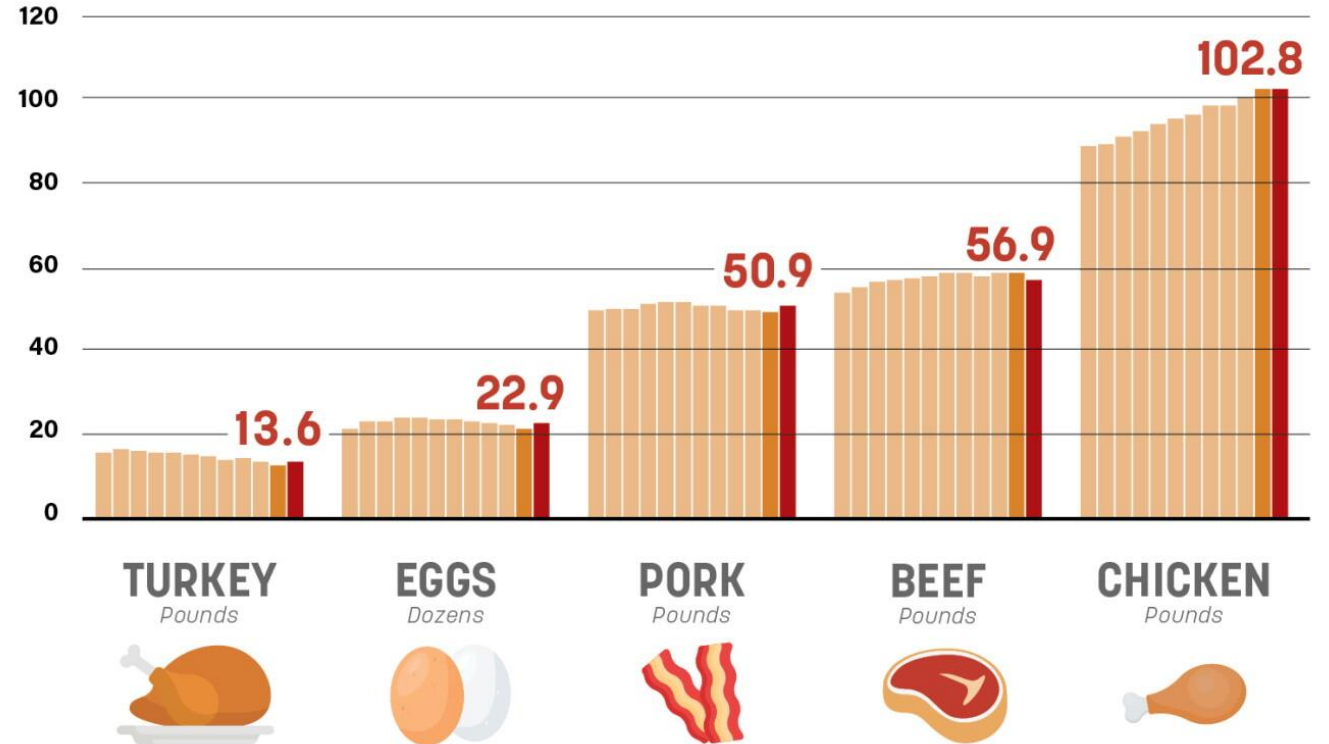
Note: Data for 2025 and 2026 represent forecast values. Per capita meat availability is a proxy measure of consumption and does not account for indirect consumer uses, such as pet food and food waste.

Source: USDA, Economic Research Service using data from the USDA, World Agricultural Outlook Board, World Agricultural Supply and Demand Estimates.

CHARTS of NOTE

Estimated Yearly Consumption Per Person

Per Capita Availability, 2015 to 2024 | 2025 Projection | 2026 Projection



A Better Beef Program | Genetics for Improving Pasture to Plate



What this means for **A Better Beef Program**

The competitive picture demands beef compete on value, not volume — and genetics and systems approach are the levers that deliver it.

1

Defend the premium

- Per-capita beef has fallen from 117 lbs (1974) to ~57 lbs — but retail price has risen 24% in two years
- Demand has held despite supply contraction
- Genetic gains in marbling, yield grade, and consistency protect that premium against cheaper proteins

2

Out-efficiency the competition

- Pork and chicken win on feed conversion and turnover
- Beef closes the gap via genetics: feed efficiency, growth rate, reproductive performance
- Pasture-to-plate optimization is the structural answer to the cycle

3

Tell a story alt-protein can't

- Plant-based is in retreat — Beyond volumes –16%, category trust eroding
- Beef can own the authenticity, nutrition, and craft narrative
- A Better Beef Program is the credible counter-narrative: real animals, measurable genetic progress

Genetics and holistic production turns biology into competitive advantage across all breeds — and that's how beef stays on the plate.



Thank you

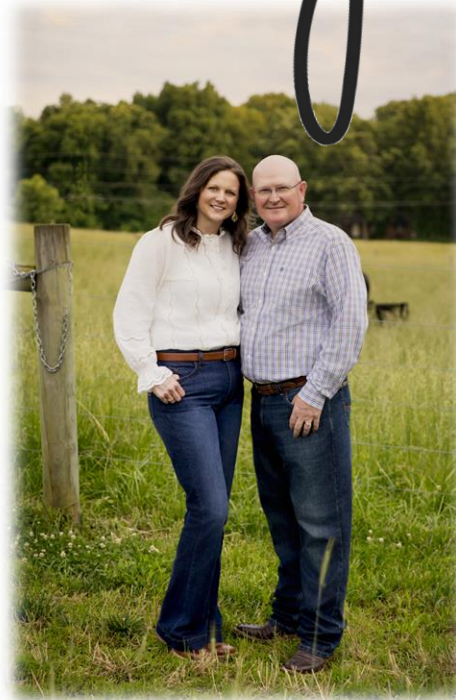


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