HJ 52: INTERIM STUDY ON THE MONTANA CATTLE INDUSTRY

FINAL REPORT TO THE 70TH MONTANA LEGISLATURE

MONTANA LEGISLATURE

Economic Affairs Interim Committee (EAIC)

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This report is a summary of the work of the Economic Affairs Interim Committee (EAIC), specific to EAIC's 2025-2026 Montana cattle industry study as outlined in the EAIC 2025-2026 Work Plan and House Joint Resolution 52 (2025). Members received additional information and public testimony on the subject, and this report is an effort to highlight key information and the processes followed by EAIC in reaching its conclusions. To review additional information, including audio minutes and exhibits, visit the EAIC website: https://committees.legmt.gov/#/nonStandingCommittees/9.

A full report, including links to the documents referenced in this print report, is available at the EAIC website: https://committees.legmt.gov/#/nonStandingCommittees/9.

HJ 52: MONTANA CATTLE INDUSTRY

INTRODUCTION

The Legislative Council assigned House Joint Resolution 52: Interim Study on the Montana Cattle Industry to EAIC for the 2025-2026 interim. The study ranked 30th out of 36 study resolutions passed and approved by the 69th Legislature and was one of six studies assigned to EAIC.

STUDY DIRECTIVES

The intent of the study was "to examine the profitability and marketability of the state's cattle industry, propose legislation to improve management, research, education, and promotion of state beef and beef products, and support the expansion of domestic and international markets for Montana cattle." Specifically, the study requested the assigned committee to:

(1) consider the implementation of a state assessment on Montana cattle to fund the promotion, marketing, research of, and education about Montana cattle and cattle products, similar to the national Beef Checkoff program but at the state level;
(2) review how similar state-level cattle assessments were implemented in other states, including but not limited to North Dakota, Idaho, Washington, Utah, California, and Texas;
(3) examine stakeholder research and recommendations for conducting a referendum of Montana cattle producers to determine the level of interest for a state cattle assessment;
(4) investigate options for an assessment collection and refund distribution process, similar to existing processes for the refund of assessments on wheat, barley, and pulse crops in Title 80, chapter 11, MCA;
(5) explore existing resources that could be utilized, including but not limited to the Montana Beef Council; and
(6) evaluate the membership of a potential quasi-state agency commodity board to administer and manage the state cattle assessment and funds, including the membership selection and the appointment process.

EAIC allocated approximately 5% (.05 full-time equivalent [FTE]) of its total work time to HJ 52, which included the following activities:

1) **a Department of Agriculture presentation on the assessment collection and refund distribution process for wheat, barley, and pulse crops as potential examples for a cattle assessment; and**
2) **a Montana Beef Council presentation on existing resources that promote the Montana cattle industry.**

SUMMARY OF COMMITTEE WORK AND MATERIALS

NOVEMBER 12, 2025

EAIC hosted a panel of experts, including Mike Honeycutt, executive officer of the Montana Department of Livestock (DOL); Chaley Harney, executive director of the Montana Beef Council (MBC); and Liz Edmundson, executive director of the Montana Pulse Crop Committee.

DOL provided information about the state of the Montana cattle industry as of 2025. Despite a decline in Montana's cattle inventory, which has continued to trend downward to historic lows and is unlikely to rebuild in the near future, the amount of beef produced has remained relatively consistent due to increases in beef production, meaning the amount of meat produced by each animal. The near-term future of Montana's cattle industry will be subject to variables, including government interference on prices, issues of border control, tariffs, and health threats to livestock.

MBC provided information about the national Beef Checkoff program, noting that the program's goal is to promote national and international demand for beef, though promotion of specifically Montana-produced beef is not permitted under the program. MBC also noted that, while the costs of ranching have increased significantly—inflation since 1986 has reduced the purchasing power of a dollar to 33 cents—the Beef Checkoff has not increased, remaining at $1 for each head of cattle.

The Montana Pulse Crop Committee provided information about the checkoff program for Montana pulse crops—a mandatory 1% of sales, refundable upon request. The Montana Pulse Crop Committee noted that the program has helped keep farms supported during disasters, such as drought; that the collective investment has helped Montana become the national leader in producing dry peas, lentils, and chickpeas; and that the program has helped expand Montana's pulse crop demand through nutritional studies and international marketing.

Public comment included concerns for clear demarcations as to what a potential state-level beef checkoff program would achieve; how a state-level checkoff would benefit participants; inclusion of simple refund procedures; how councilmember staffing would be determined; and other issues related to programmatic implementation and administration.

EAIC asked DOL how Montana's cattle markets with Japan and South Korea were created (*Response: Most recently strengthened by a trade mission involving a variety of U.S. industries, including a beef component with a Montana producer.*); and whether there were other market opportunities identified (*Response: Japan, South Korea, Canada, Mexico, and Taiwan are Montana's top five international markets, which are mostly producer-driven enterprises.*).

EAIC asked MBC how much Montana beef was consumed in the state (*Response: Unknown, as most Montana cattle leave the state for processing, where they are grouped with many other states' cattle.*); whether MBC is trying to prioritize Montana-raised beef sales (*Response: MBC cannot directly promote Montana beef, but it does provide a directory of retailers for Montana beef, as well as a Montana school food service guide*); and if MBC would be able to manage a state-level checkoff and promote Montana beef (*Response: MBC cannot advocate for a separate state checkoff, but it does have the structure to collect and promote a separate account and would be able to do so legally*).

STUDY MATERIALS

- Staff Background Paper
- Montana Beef Council (MBC)
  - MBC Presentation
  - MBC FY 2024 Annual Report
  - MBC 2024 Producer Insight
  - MBC Other States Details and Results
- Montana Pulse Crop Committee Report
- Montana Pulse Crop Committee Official Field Guide

RECOMMENDATIONS

EAIC recommends the individual pursuit of any legislation regarding this study.

APPENDIX A:
ECONOMIC AFFAIRS INTERIM COMMITTEE MEMBERS

Before the close of each legislative session, House and Senate leadership appoint lawmakers to interim committees. The members of the Economic Affairs Interim Committee, like most other interim committees, serve one 20-month term. Members who are reelected to the Legislature, subject to overall term limits and if appointed, may serve again on an interim committee. This information is included in order to comply with section 2-15-155, MCA.

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