



EXTENSION

Ag News

November 2025 Edition



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What's Next for Cattle and Beef Markets?

Derrell S. Peel, Oklahoma State University Extension
Livestock Marketing Specialist

Cattle futures and cash markets were pummeled by a barrage of politics the past two weeks. Negative market reactions piled up under a slew of political statements and proposals along with rumors about additional political actions that left market traders and producers running for the sidelines. Feeder cattle dropped \$200-\$300/head in value last week in Oklahoma auctions.

It's important to remember that cattle market fundamentals have not changed... it's the same supply and demand conditions that existed three weeks ago.

Continued on Page 2

What's Next for Cattle and Beef Markets?, cont.

Political talk has included more beef imports from Argentina...largely irrelevant as an import source and with no expected impacts on U.S. beef prices as well as a possible reduction in Brazil tariffs...which could impact processing beef supplies slightly. Lack of data due to the government shutdown makes it hard to say how much the August tariffs on Brazil decreased beef imports and therefore how much removing/reducing them might increase beef imports. In any event it would be a return to market conditions that existed through July, including record high lean trimmings prices. Beef imports from Argentina and Brazil will have no impact on steak prices in the U.S.

USDA has offered a wide range of proposals to “Fortify the American Beef Industry”, which included a laundry list of things including regulatory changes, access to federal grazing lands, and packing infrastructure. None of these will change the supply and demand conditions of cattle and beef production – or beef prices – in the short run nor change the multi-year timeline for the industry to rebuild. Will the Mexican border reopen for cattle imports...who knows? Even if it does, it will not change feeder cattle supplies much for several months.

Also, there is the rumor of a thaw in the trade war with China. It's not clear if this would include reopening the Chinese market to U.S. beef, which has been devastated recently. Record high cattle and beef prices have largely masked the negative impacts of the loss of beef export markets to China. The latest available trade data for July showed that China accounted for 1.2 percent of beef exports compared to one year ago when beef exports to China represented 15.3 percent of monthly exports. If beef exports to China resume it will add additional support to U.S. cattle and beef prices.

What's Next for Cattle and Beef Markets?, cont.

What else...I'm probably forgetting something...

All the political talk could ultimately have either positive or negative impacts on cattle and beef markets; it's impossible to say what the net effect might be. The impacts will be marginal and do not change the underlying market fundamentals. With less agitation, cattle markets will bounce back quickly, and markets will guide production decisions. The trajectory and price expectations for the next two - four years have not changed.

What is clear is that uncertainty and volatility from political comments and rhetoric have a very real negative impact on producers and consumers. The federal government's demonstrated willingness to meddle in cattle and beef markets and interfere with markets doing what they do so well likely means that the industry will continue to deal with debilitating uncertainty and volatility. The most likely outcome is that it will keep cattle producers and lenders cautious and further delay the lengthy process of herd rebuilding, which already looks to extend nearly to the end of the decade.

Selecting Replacement Heifers

BUILDING A PRODUCTIVE COWHERD FOR THE FUTURE

Parker A. Henley and Mark Z. Johnson, Oklahoma State University Extension Beef Cattle Specialists

As we all consider current cow herd dynamics and market trends, producers are evaluating options to rebuild or expand, making this a timely moment to revisit selection priorities. Thoughtful replacement heifer selection is essential to shaping the future of a cowherd. Heifers that fit the production environment, breed early, calve unassisted, and remain productive for years contribute significantly to long-term profitability. This article outlines key traits and tools to consider when making those selections.

Growth Rate to Achieve Early Puberty and Reproductive Readiness

Heifers that reach puberty early are more likely to conceive during their first breeding season and calve by 24 months of age. Early puberty is moderately to highly heritable and positively correlated with lifetime reproductive success. To support this, heifers should demonstrate consistent growth and reach target weights that promote reproductive readiness. Ideally, they should weigh approximately 65% of their projected mature weight at the start of the breeding season (typically between 13 and 15 months of age). For example, a heifer expected to mature at 1,400 pounds should weigh around 910 pounds at breeding. Reproductive tract scoring, conducted 4 to 6 weeks prior to the breeding season, is a valuable tool for assessing reproductive maturity. Selecting heifers that exhibit early reproductive development lays the foundation for a more fertile, efficient, and productive cowherd.

Fertility and Longevity

Although fertility has low heritability, it is one of the most economically important traits in beef production. Aim for a 60% first-service pregnancy rate and 90% pregnancy rate within a 60-day breeding season. Early pregnancy diagnosis allows for timely culling of open heifers, which can be marketed as yearlings. Over time, this strategy enhances herd fertility and longevity, as early-calving heifers tend to remain in the herd longer and wean more pounds of calf over their lifetime. Maintaining a buffer of 5–10% more heifers than needed allows producers to cull sub-fertile individuals without compromising replacement numbers.

Selecting Replacement Heifers: Building a Productive Cowherd for the Future, cont.

Milking Ability and Mammary Development

Optimal milk production is closely tied to forage availability and overall nutritional management. While milking ability is low in heritability, selecting sires with appropriate Milk EPDs can help target the right level of production. Avoid selecting heifers that were overly fat at weaning, as excessive fat can impair mammary development and future milk yield. When possible, evaluate the udder and teat structure of the dam to anticipate future performance.

Body Type, Disposition, and Structural Soundness

Phenotypic evaluation remains a cornerstone of replacement heifer selection. Avoid extremes in size, as both overly large and small heifers may present challenges in feed efficiency, calving ease, and longevity. Body type and fleshing ability are also important indicators of future productivity. Heifers with adequate rib shape, depth of body, and muscling tend to maintain body condition more effectively, especially under variable nutritional conditions. Disposition is moderately to highly heritable and plays a significant role in herd management. Calm, manageable heifers improve safety, reduce stress during handling, and often show improved reproductive performance. Culling heifers with poor temperament enhances the working environment and herd efficiency. Structural soundness, particularly in feet, legs, and eyes, is vital for long-term productivity. Heifers should be evaluated for mobility, hoof integrity, and leg structure to ensure they can thrive in various terrain and withstand the physical demands of breeding, calving, and raising a calf.

Calving Ease and Pelvic Measurements

Pelvic area (PA) measurements can help predict calving ease. A general rule of thumb is dividing PA by 2.1 to estimate the maximum calf weight a heifer can deliver unassisted. For example, a PA of 175 cm² suggests a heifer can calve an 83 lb calf. Additionally, consider Calving Ease Maternal (CEM) EPDs when selecting sires for virgin heifers. Bulls with higher CEM values produce daughters more likely to calve unassisted. Selecting bulls with low Birth Weight (BW) and high Calving Ease Direct EPDs is also critical.

Selecting Replacement Heifers: Building a Productive Cowherd for the Future, cont.

Genomics in Heifer Selection

Advancements in DNA testing have added a powerful layer to heifer selection. Genomic-enhanced EPDs combine pedigree, performance, and DNA data to improve prediction accuracy, especially for traits like fertility, longevity, and maternal ability. Genomic tools are especially useful in commercial herds where data may be limited. Several companies offer affordable DNA testing services that help rank heifers based on genetic potential. These tests provide deep insight at a relatively low cost, helping producers increase confidence in selection decisions, identify heifers with superior genetics, and avoid investing in underperforming animals. Incorporating genomics into your selection strategy supports long-term herd productivity and profitability.

Final Thoughts

Selecting the oldest heifers, those born early in the calving season, remains a reliable strategy for identifying replacements with strong maternal backgrounds. Heifers should reach 65% of their mature weight by breeding and be culled if open after the first season. Investing in sound selection practices, including genomic tools, sets the stage for a more productive and profitable cowherd.

References:

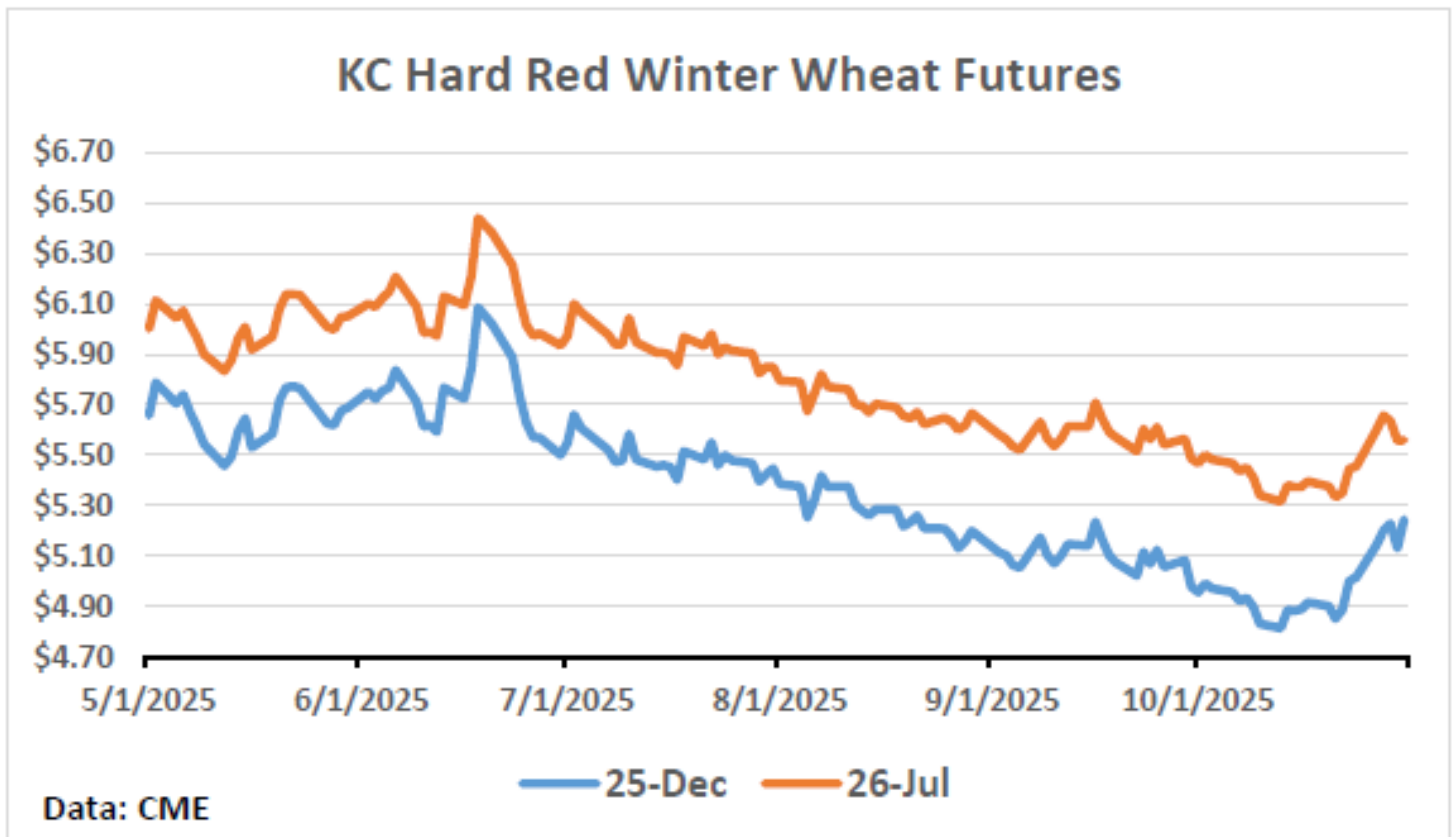
<https://www.iowabeefcenter.org/bch/ReplacementHeiferSelection.pdf>

<https://www.angus.org/Nce/SireEvaluation>

<https://jasbsci.biomedcentral.com/articles>

Wheat Market OUTLOOK

Last week wheat prices across all the major futures markets rallied on trade news. Trade deals made by President Trump across Asia last week combined with rumors of Chinese buying U.S. wheat helped to drive prices higher and saw strong follow through on Monday in the HRW market. A lack a detail on trade deals leaves quite a bit of uncertainty around this rally. July 2026 HRW prices eclipsed the projected RMA insurance price of \$5.61 and subsequently closed yesterday at \$5.71.



Wheat Outlook, cont.

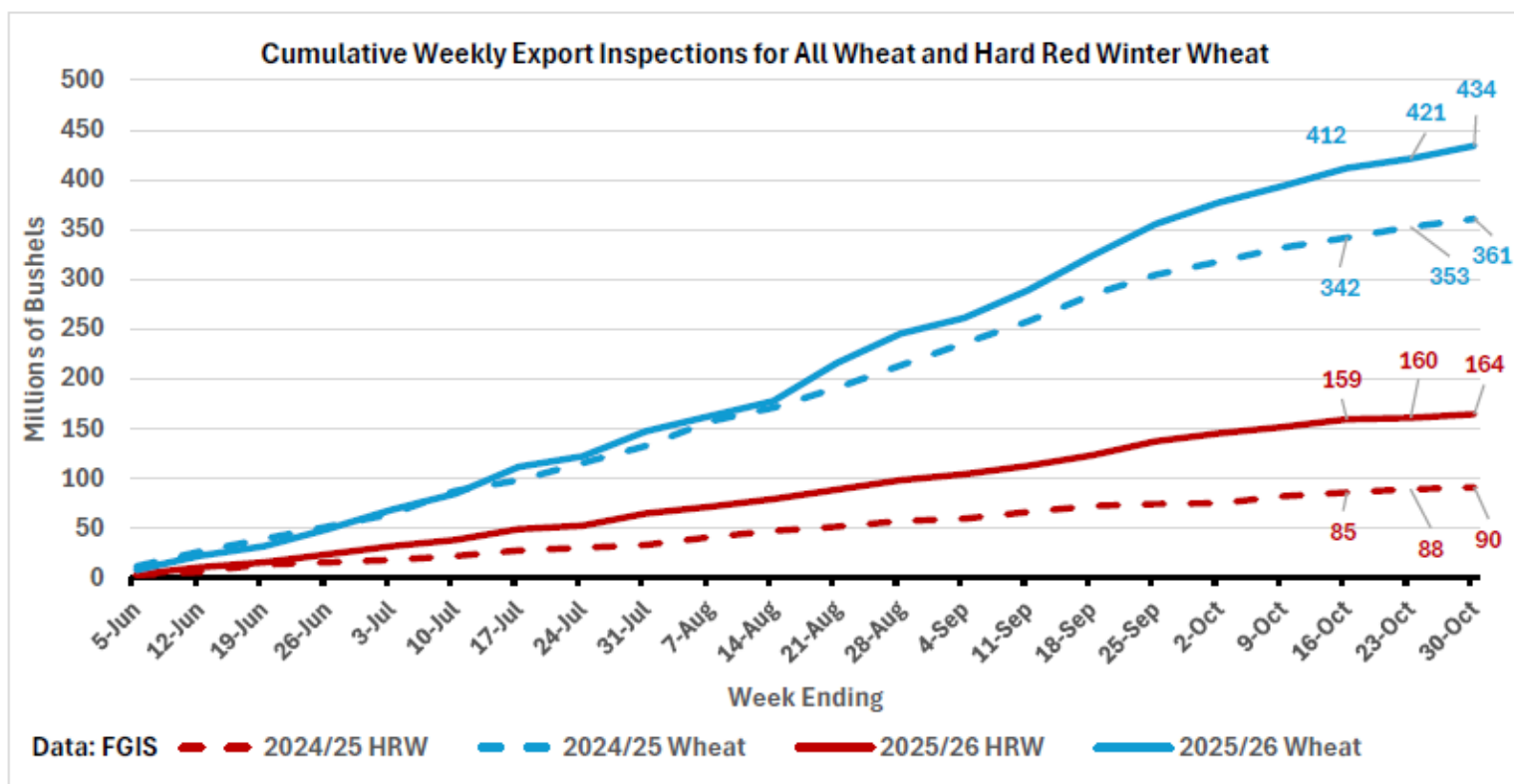
Cash prices moved higher during the runup, but basis relative to the December futures contract remained stable in most Oklahoma locations reported by the Agricultural Marketing Service.

Oklahoma Cash Wheat Prices select region averages, \$/BU

Date	North Central Avg. Price	North Central Basis	Southwest Avg. Price	Southwest Basis
10/3/2025	4.22	-74.80	4.11	-86.00
10/10/2025	4.08	-74.80	3.97	-86.00
10/17/2025	4.17	-74.80	4.06	-86.00
10/24/2025	4.27	-74.80	4.17	-85.00
10/31/2025	4.49	-74.80	4.39	-85.00

Data: USDA, AMS

The prospect of wheat prices continuing to run higher remains linked to the general outlook for a trade and follow through buying by China. The current marketing year's forecast for wheat exports sits at nine hundred million bushels. Recent export inspection data signals support for reaching and exceeding the USDA forecast.



Wheat Outlook, cont.

Export inspections in October started like the previous couple of months but faded slightly as the month ended. The weekly rate of export inspections moved above last year's pace, beginning in July and accelerated with buying from Latin America and Asia. With a little over 30 weeks left in the marketing year, additional exports need to reach 466 million bushels to reach the current USDA projection. Census data and the inclusion of wheat products tend to run above grain inspection data, but inspection data is all we have at this point. The weekly pace of exports to reach the USDA forecast averages 15.3 million bushels per week. For the eight weeks prior to October 23, weekly export inspections averaged twenty-two million bushels per week, but the most recent two weeks fell to 11.2 million bushels.

While the export demand for U.S. wheat during the remainder of the marketing year is uncertain, the potential for wheat exports to eclipse the current forecast appears strong. A growth in forecasted marketing year exports seems certain in the WASDE report due out on November 14 if China and additional buying from Asia materialize. Even so, large wheat crops around the world with the Black Sea region, Australia, and South America entering the market in earnest may erode export demand out of the U.S. in the latter half of the marketing year. Price action should remain volatile on trade news over the near term and taking advantage of strong rallies for marketing both old and new crop seems prudent.



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Dates to Remember

November 8th
Quail Season Starts

November 11th
Veterans Day
OSU Office & County Courthouse Closed

November 22nd
Deer Gun Season Starts

November 27th to 28th
Thanksgiving Holidays
OSU Office & County Courthouse Closed

December 25th to 26th
Christmas Holidays
OSU Office & County Courthouse Closed



Persons with disabilities who require alternative means for communication or program information or reasonable accommodation need to contact Hagen Puentes, OSU Extension Ag Educator, at (580) 623-5195 or hagen.puentes@okstate.edu at least two weeks prior to the event.

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