

# National Association of Animal Breeders



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## Domestic Rebound and Global Resilience Define 2025 U.S. Semen Sales

*National Association of Animal Breeders regular members unit sales show increases in many key categories with growth in a large number of important international markets.*

Madison, WI [March 11, 2026] – The National Association of Animal Breeders (NAAB) members report annual units for the categories of domestic sales, export sales, custom collection, and imported units for dairy and beef breeds. With approximately 95% of the US AI industry represented by NAAB members, these annual statistics provide an accurate insight of the sales of U.S. bovine semen.

"While dairy unit exports were down due to the closure of the China market, exports to other countries increased which significantly reduced the impact of the closure. Additionally, members report increases in most other categories of domestic dairy and beef as well as beef exports. Custom dairy and beef units produced for members also increased. NAAB members should be complimented for their commitment to developing new markets and increasing market share in strategically important markets. There are many positives that can be gleaned from the 2025 results" says Jay Weiker, president of NAAB.

### 2025 semen sales data

The U.S. bovine semen industry reports an overall decrease of 4% in total unit sales, settling in at just under 66 million total units reported for all categories combined. This represents a 2.9 million unit decrease giving back the previous year's gain of 2.7 million units. While total units exported decreased by 6.6%, the value of semen exported increased by .6% or roughly \$2 million and reached a new record of \$327.6 million reflecting a continued increase in average blend price.

The total number of dairy unit sales for domestic, exports and custom collected for non-members experienced a substantial 6% decrease compared to 2024. This represents a 3 million unit decrease for a total of 45.8 million dairy units. Beef unit sales experienced a slight turnaround and increased by 1%, which equates to just over 122,000 units for a total of 20.2 million units. Breaking this down further, the beef on dairy semen sales in the US were consistent at 8.1 million units while exports of beef on dairy units increased by 13% representing an increase of 279K units. Beef on beef sales saw an increase of 466,000 units, a reversal of the decreases over the past 2 years.

In the US, the type of semen used by dairy producers continues to shift and the trends continue. In 2025 the largest semen type was gender selected dairy semen at 10.6 million units, an increase of 644K units, followed by beef on dairy at 8.1 million units and then conventional dairy at 6.0 million units. Producers are genomic testing a larger number of animals so they can produce replacement heifers from their best animals using gender selected semen and then use more beef semen on the rest of the herd to produce high value F1 calves for the feedlots. The shortfall of beef animals being produced by traditional beef producers is partially being replaced

with the F1 dairy cross calves. There is strong demand for replacement heifers for international dairy producers so there are increasing opportunities for US dairy producers to generate more heifers for export.

NAAB semen sales statistics include the reporting of heterospermic semen units for several years enabling us to analyze the trends. Over the years, very few heterospermic dairy units were sold but the 2025 semen sales reveal that the heterospermic beef product peaked at over 2.8 million units in 2024 but declined to just over 2 million units in 2025. Heterospermic beef units represent 21% of all beef units sold in the US whereas only 12% of the total units are heterospermic when domestic and international are combined. Domestic sales represented 2 million of the 2.4 million units and the remaining 400k units were exported. Heterospermic beef slips one place to the third largest 'breed' or category of beef semen sold. Angus maintains a strong and distant first place followed by Crossbreeds and then heterospermic. Dairy producers make most use of Holstein B&W semen units followed by beef and Jersey.

### **Slight rebound in domestic semen sales**

The domestic dairy units reported for the U.S. increased by 2%, nearly 367k units with a market size of 16.5 million dairy units. Dairy units declined over the five previous years, so this is a welcome change.

Domestic beef units sold in the U.S. increased by 1% or 114k units overall with units used on dairies remaining unchanged. Sales of beef semen into beef herds increased for the second year in a row, increasing by 7% or 106K units, adding to the 290k unit increase in 2024. The total beef units sold in the US totaled 9.8 million units with 8.1 million going into dairy herds and 1.7 million used in beef herds.

Gender selected dairy units continue to grow by 644k units or 6% to 10.6 of the 16.5 million dairy units used in the USA. Gender selected dairy semen now represents 64% of the dairy units used by U.S. dairy producers. Conventional units declined by 280k units. Volatile global developments are the likely cause behind the decline in custom collected units by non-members which showed a sharp decrease of 52% for dairy and a 12% decrease for beef units.

### **Dairy exports also experienced a nice increase**

"Despite the early setback of losing the China market in February, U.S. bovine semen exports demonstrated remarkable resilience throughout the year," says International Program Director Dr. Sophie Eaglen. "The industry not only stabilized but continued to advance by strengthening long-standing markets and opening new ones. Total export value reached a new record of \$327 million, a modest yet meaningful 0.6% increase, even as total units declined 6.66%.

Encouragingly, global interest in beef genetics continued to rise, with beef units growing 2.7% and supported by expanding adoption of beef-on-dairy strategies. The U.S. footprint also widened significantly, reaching 124 countries compared to 108 the previous year which is evidence of broadening diversification and the continued appeal of U.S. genetics. Particularly strong growth was seen in Western Europe (28%), Eastern Europe (19%), Brazil's renewed momentum, and growing opportunities across North Africa and South Asia. These trends underscore an industry that is adapting, innovating, and expanding despite market volatility. Dairy units exported settled in at 28.3 million units representing a decrease of 2.5 million units. Beef semen exports increased to a total of 5.5 million units, up 640k units or 13% over the previous year.

## Global trends

Producers around the world face similar issues related to the cost of production, labor shortages and finding new ways to decrease the carbon footprint of livestock production. These reproductive management practices influence the type of product used.

While the U.S. market utilizes 6 million units of conventional dairy semen usage, export markets purchased 19 million units, just over 3 times the volume. There has been a decline in the utilization of conventional semen in the U.S., and in 2025 international markets trended the same direction, although this will be strongly influenced by the closure of the China market in February. Comparing the 19 million units of conventional dairy semen exported to the 9.3 million units of gender selected semen exported, it is roughly twice the amount. Similarly, 10.5 million units of gender selected dairy semen were used by U.S. producers.

Roughly 37% of the dairy semen produced by NAAB members was used by U.S. producers and the other 63% was exported. Roughly 64% of the beef semen produced by members is used by U.S. producers and the other 36% was exported.

Due to the closure of the China market, they did not retain their place as the number one market. In 2025, the UK was the top export market for dollar value followed by Italy and Mexico. Brazil resumed their place as the top market for unit volume followed by Mexico and Russia.

There were a few new markets that topped the \$1 million dollar value level in 2025 making a total of 46 international markets that imported product valued over \$1 million dollars. There were 17 countries that imported product valued over \$5 million dollars, down from 18 countries in 2024. These 46 markets account for 94% of the total export units and 95% of the dollar value.

More information about NAAB and its annual statistics can be found on <http://www.naab-css.org/>

NAAB is the national trade association for artificial insemination businesses. In that capacity, NAAB has the responsibility to negotiate with international markets to resolve trade restrictions that might limit access to product from the USA. NAAB members account for about 95% of dairy and beef semen sold in the USA and market semen to 124 countries around the world. NAAB members also participate in the Certified Semen Services (CSS) program to assure that the semen they provide to both domestic and international producers meet or exceeds the minimum health standards as well as semen quality standards.