

# MEAT MARKET *Report*



March 2025

## Top Stories



### Cold Storage Pork Reserves Down Drastically

As of the end of January, the total amount of pork inventory in cold storage was at 410.3M pounds, down 11.5% from the previous year and 18% below the five-year average. This is the lowest January level in twenty-five years.

### Beef Harvest Levels Slowly on the Rise

A continued growth in harvest levels is expected to occur into April as spring demand begins. Carcass weights continue to remain strong compared to last year. Beef production has been able to garner slightly higher volumes for much of 2025 so far, despite historically low harvest rates. The record-high carcass weights we have experienced to start the year are a major contributor to the continued production levels.

### Number of New HPAI Cattle Cases Down

In the last thirty days, the number of new cases of HPAI in cattle has been contained to only three states: California, Nevada and Idaho. Other states are still experiencing outbreaks, but not new cases.

### Future Corn and Soybean Outlook Forecasts Reduced Production

The 2025 U.S. corn outlook is for lower production, feed and residual use, exports and ending stocks. For soybeans, the report shows lower production, slightly higher imports and unchanged exports and crush.



## Pork Update

The total hog harvest is expected to average 1% above last year into early spring with modest gains holding throughout the entire quarter. Pork production has been negatively affected by weather disruptions, resulting in lower YoY levels. Ham prices are expected to decline through the first of April but will increase throughout the month reaching the mid to upper \$80s by the end of April.

## Beef Update

The 90% beef trimmings market will likely be steady in the low \$380s through March before additional seasonal demand pulls it toward the low \$400 range for summer peaks. The brisket market is also stabilizing with the Choice 120s trading at \$340 for 3 weeks now.

## Poultry Update

The 2025 weekly RTC chicken production outlook should improve and remain positive, especially with egg sets and placements continuing to outpace year-ago levels. The RTC turkey production volume projections are down 7% into the second quarter due to lagging poult placements and restrained harvest levels.

## Hungry for more information?

Contact our team and ask how fully cooked meats can help your operation.

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