



IN THE CATTLE MARKETS



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New world Screwworm Moves North Adding to Market Volatility

[New detections](#) of new world screwworm (NWS) in Mexico led Sec. Brooke Rollins to close Southern ports of entry to livestock imports. USDA had previously announced a phased re-opening of Southern ports, beginning with the furthest port away from where NWS has been detected in Mexico and moving East as continued progress is made on sterile fly production. However, the re-opening was halted, and livestock imports once again paused, when NWS was detected 160 miles North of the sterile fly dispersal locations in Veracruz, Mexico--only 370 miles from the U.S. border.

New World Screwworm Movement

The map illustrates the spread of New World screwworm. Large red arrows indicate the primary direction of movement: one arrow points from Honduras/Guatemala towards Mexico, and another points from Mexico towards the southern United States. A dashed line marks a distance of 370 miles from the US border near Brownsville.

Legend:

- Containment Threshold (indicated by an orange line)
- Detection Outside of Containment Threshold (indicated by a red dot)

TOTAL CASES = 2748+

DATE OF FIRST CASE

COUNTRY	MONTH	YEAR
Mexico	November	2024
Guatemala	October	2024
Belize	December	2024
Honduras	September	2024
Nicaragua	March	2024
Costa Rica	July	2023
Panama	August	2022

Data Source: USDA – APHIS, AFBF Calculations

One question being asked is how much of an impact will the Southern port closures have on markets? The U.S. imports 1.2-1.5 million head of cattle from Mexico every year. These are mostly feeder cattle destined for feedlots and ultimately beef production. U.S. cattle slaughter was about 31.9 million head in 2024. In terms of production, 1.5 million head would be about 4% of 2024 slaughter. This is a significant portion of the market and while other fundamental factors like strong demand are currently having a bigger impact, this drop in supply will put upward pressure on cattle prices. According to USDA's [latest WASDE report](#), 2025 production is forecast down 170 million pounds due to smaller production for the second half of the year. Higher feedlot placements are expected in the second half of 2025, leading USDA to increase 2026 production by 540 million pounds or 2% from last month to 25.815 billion pounds. This forecast assumes that cattle imports from Mexico will remain banned for the remainder of the forecast period.

Overall cash cattle prices are running about 25% higher than last year. Friday brought more strength in the markets with all feeder and live cattle futures contracts closing

higher and most closing just below contract highs to round out the week. However, futures fell through Monday giving back all of Friday's gains and demonstrating continued volatility. Meanwhile cash prices for 700-800 lb. feeders were up about 4% last week in the South at \$333/cwt and as high as \$363 in Nebraska to the North up about 26% from last year.

		Week of 7/11/25	Week of 7/4/25	Week of 7/12/24
5-Area Fed Steer	all grades, live weight, \$/cwt	\$237.21	\$229.43	\$194.24
	all grades, dressed weight, \$/cwt	\$379.21	\$369.30	\$312.60
Boxed Beef	Choice Value, 600-900 lb., \$/cwt	\$386.75	\$393.94	\$324.78
	Choice-Select Spread, \$/cwt	\$13.43	\$13.22	\$21.05
700-800 lb. Feeder Steer	Montana 3-market, \$/cwt	\$335.00	--	--
	Nebraska 7-market, \$/cwt	\$363.56	--	\$289.29
	Oklahoma 8-market, \$/cwt	\$333.01	\$320.77	\$266.28
500-600 lb. Feeder Steer	Montana 3-market, \$/cwt	\$415.00	--	--
	Nebraska 7-market, \$/cwt	\$445.96	\$441.00	\$361.40
	Oklahoma 8-market, \$/cwt	\$399.45	\$384.24	\$309.61
Feed Grains	Corn, Omaha, NE, \$/bu (Thursday)	\$4.12	\$4.35	\$4.25
	DDGS, Nebraska, \$/ton	\$143.43	--	\$148.00

Data Source: USDA-AMS Market News as compiled by LMIC

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