



# IN THE CATTLE MARKETS



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## Ground Beef Production and the Balance of Lean and Fat Trimmings

U.S. beef imports help balance domestic lean and fat trimmings supplies. The key shift is not just fewer cows, but also heavier fed cattle carcasses producing more fat trim. Together, those changes tilt the U.S. trim supply toward fat.

Domestic lean trim supplies are down because of lower cow slaughter. Through June, combined beef and dairy cow slaughter is down 13%, translating to an estimated 10% decline in domestic lean trimmings production. Lean trimmings from cull cows and bulls are the primary source of 85s and 90s used in ground beef. At the same time, fed steer and heifer dressed weights remain historically high. Through June, fed cattle slaughter is down 4%, but dressed steer weights are up 3%, adding more pounds of fat trim. The net result is a trim market with proportionally less lean and more fat.

With cow slaughter down and fed cattle dressed weights up, imports of lean trim become essential. So far in 2025, imports are sharply higher, up 28% in June and 33% year to date, and most of those imports are lean trimmings. Brazil was the leading source through the first half of the year, accounting for 25% of total U.S. beef imports, though tariff increases will limit volumes going forward. This places more emphasis on other suppliers such as Australia and New Zealand, where year-to-date imports are up 35% and 8%, respectively.

Imports of lean trim help balance the U.S. beef trimmings market. Otherwise, an adjustment occurs through higher prices that ration limited lean trim across end users. This means higher ground beef prices for consumers.

## The Markets

		Week of 8/15/25	Week of 8/8/25	Week of 8/16/24
<b>5-Area Fed Steer</b>	all grades, live weight, \$/cwt	\$242.01	\$242.01	\$189.14
	all grades, dressed weight, \$/cwt	\$382.78	\$381.25	\$298.04
<b>Boxed Beef</b>	Choice Value, 600-900 lb., \$/cwt	\$391.39	\$373.67	\$316.41
	Choice-Select Spread, \$/cwt	\$25.22	\$24.13	\$15.23
<b>700-800 lb. Feeder Steer</b>	Montana 3-market, \$/cwt	\$365.57	\$380.00	--
	Nebraska 7-market, \$/cwt	\$373.91	\$378.37	\$263.65
	Oklahoma 8-market, \$/cwt	\$366.46	\$353.88	\$254.58
<b>500-600 lb. Feeder Steer</b>	Montana 3-market, \$/cwt	\$420.00	--	--
	Nebraska 7-market, \$/cwt	\$410.00	\$443.74	\$310.50
	Oklahoma 8-market, \$/cwt	\$424.67	\$415.41	\$302.40
<b>Feed Grains</b>	Corn, Omaha, NE, \$/bu (Thursday)	\$3.75	\$3.85	\$3.97
	DDGS, Nebraska, \$/ton	\$137.78	\$137.89	\$147.00

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

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