



SUPERIOR

MARKET UPDATES

Meat • Seafood • Produce

Extreme weather impacting supply

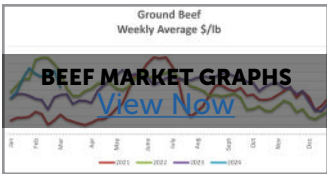
Bad weather continues to affect all sectors of produce and fish

MEAT INSIGHTS



Beef ▼

The current market landscape is shifting from steady to **weaker**. Last week, total beef production increased by 2.9% compared to the previous week and rose by 3.7% from the same week last year. However, year-to-date production is down by 9.7% compared to last year's figures. Additionally, headcounts have decreased by 12.9% year-to-date. Overall, market supplies remain constrained as suppliers strive to maintain tight production levels, with some opting for shorter work weeks. On the demand side, beef remains in good standing, although many high quotes have been noted. **Grinds** are experiencing a stronger market, even as other sectors see lower placements. Demand has been steadily increasing since early December, with 2025 quotes showing a 28% rise over 2024. This trend with grinds is expected to continue for the foreseeable future.



MARKET TRENDS

Meat



BEEF		
Grinds	•	•
Loins		•
Rounds	•	
Chucks	•	•
Ribs	•	•

PORK		
Bellies	•	•
Hams	•	•
Loins	•	•
Butts		•
Ribs	•	•

CHICKEN		
WOGS		•
Tenders	•	•
Boneless Breast	•	•
Leg Quarter	•	•
Wings	•	•



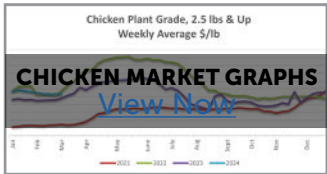
Pork ■

The market is **stable**, showing a 4.2% rise in total pork production last week compared to the prior week, and a 0.3% increase from the same week last year. Demand is solid and consistent, reflecting what is generally anticipated during this season. Pork **butts** are on the weaker side, yet domestic retail demand remains strong thanks to various promotions. Foodservice demand is steady as well. Exports and trades are holding firm, though they exhibit softer undertones, and this trend is expected to continue for some time.



Chicken ■

The market remains largely unchanged this week, with **stability** prevailing. The total headcount has reached 177,331,000, compared to 142,801,000 for the same week last year. The average weight recorded last week was 6.77 lbs, an increase from 6.54 lbs a year ago. Supply chains have faced interruptions due to severe weather affecting areas from the Carolinas to Texas. Furthermore, shortened plant hours are constraining both trading activities and supply availability. With overall demand decreasing in recent weeks, **WOGS** are experiencing a downturn. Nonetheless, there is still a good supply, especially for premium sizes, even as WOGS trend downward.



SEAFOOD INSIGHTS



Freshwater Fish ▲

With the colder weather settling in, not much is anticipated to change for freshwater fish. However, whitefish and yellow perch are likely to see improved catches, though not in large numbers, but yellow perch is expected to fare the best. Walleye is expected to follow a similar trend as whitefish, while lake trout is projected to fare better, with a steady supply of fresh options available.



North American Lobster ▬

The market for lobster remains **steady** overall. Warm water lobster tails are in high demand but remain in tight supply, while larger sizes face weak demand and oversupply. North American lobster also shows stability, with Canadian imports into the U.S. increasing by 21.9% in September, leading to a year-to-date rise of 9.2%.



Chilean Salmon ▬

Stability characterizes the markets, with salmon prices holding firm within their established ranges, bolstered by a dependable supply situation.



White Shrimp ▬

Stability characterizes the market, where moderate demand is evident for headless shell-on and head-on shell-on categories. Quotes vary widely based on origin and the current state of the U.S. spot market. Asian supply is plentiful across most size categories, and replacement costs have leveled off.



Scallops ▬

The market remains **stable**, gradually shifting from a soft to a firmer stance. In the Mid-Atlantic region, landings have been restricted, resulting in a constrained supply scenario. This tightness in supply is causing some upward pressure on market prices.



King Crab ▲

The markets are steadfast in their **strength**. With the reduction in trade and supply of Eastern European king crab, there is a tight supply situation, but prices continue to hold steady.



Snow Crab ▬

The market is robust yet **steady**, with strong demand noted across various sizes and sources. Supplier inventories differ, and trading levels are currently at the upper end of the established ranges.

MARKET TRENDS

Seafood

SEAFOOD		
King Crab	•	
Canadian Snow Crab	•	
Blue Swimming Crab	•	
White Shrimp	•	
Canadian Salmon		•
Chilean Atlantic Salmon	•	
Mahi Mahi	•	
Cod	•	
North American Lobster	•	
Tuna	•	
Tilapia	•	
Halibut	•	
Scallops	•	
Walleye	•	
Whitefish	•	
Yellow Perch	•	
Lake Trout	•	
Rainbow Trout	•	



PRODUCE INSIGHTS

MARKET TRENDS

Produce



Squash ▲

The recent cold snap in Florida is causing a **shortage** of supplies. Fortunately, the quality is still being rated positively, and demand remains consistent. The biggest concern is with Western supplies, as demand is exceeding what is currently on hand. Larger sizes are proving to be the rarest. We should prepare for lower volumes as the cold weather persists.



Peppers —

Eastern green, red, and yellow peppers are maintaining good quality with a steady supply and **stable** market conditions. In the Western region, both green and colored peppers also show good quality and consistent volumes. However, colder weather is expected to affect production.



Potatoes —

It seems that conditions have **settled** down, and there is an ample supply expected for the rest of the season. The trend indicates a preference for larger potatoes, with smaller varieties becoming increasingly rare. Reports suggest that the quality remains high for all sizes.



Avocados ▲

Mexican supplies are still **limited**, though there are signs of slight improvement. The demand continues to soar, and this trend is likely to persist, especially with the Super Bowl approaching. California's season is just kicking off with lower volumes, but it is anticipated to ramp up significantly by March.



Onions —

Supplies are looking good and are likely to hold **steady** into spring. White onions are lighter in availability this season, but demand is strong across all colors. The quality and sizing have been favorable. The market for red and yellow onions remains stable, while white onions are experiencing higher prices.



Citrus —

The **lemon** market is thriving, with ample supplies and solid demand keeping prices stable. **Limes**, on the other hand, are holding steady, but their quality is only fair, leading to a slight dip in the market. Weather conditions are anticipated to influence lime demand. Meanwhile, **oranges** are doing well, boasting excellent quality, and their demand remains consistently good.



Tomatoes ▼

The overall supply of tomatoes remains **stable**, ensuring good availability for most varieties. In contrast, cherry tomatoes are under some upward pressure as supplies dwindle. Hothouse beefsteak tomatoes are also encountering similar issues with supply shortages.



PRODUCE

Asparagus	•	
Broccoli	•	
Carrots	•	
Cauliflower	•	
Corn		•
Cucumbers	•	
Eggplant	•	
Onions	•	
Peppers		•
Potatoes	•	
Spinach	•	
Tomatoes	•	
Apples	•	
Avocados	•	
Bananas	•	
Berries	•	
Lemons	•	
Limes		•
Oranges	•	
Red Grapes	•	
Green Grapes	•	
Melons	•	
Pineapples	•	

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