

CATEGORY	NEAR-TERM MARKET PRICING TREND	SUPPLY vs. DEMAND	DSR MARKET INSIGHTS COMMENTARY
Beef (Commodity)	Steady	Short - Mixed	<i>Packers continue to limit weekly harvest levels in an effort to restrict beef supply during the seasonal peak in demand. Their objective is to keep prices elevated as the spring grilling and holiday season winds down. While current price levels are top-heavy, meaningful downward movement is not expected until after the July 4th holiday.</i>
Pork (Commodity)	Mixed	Available - Strong	<i>The butt should begin to decline post-Memorial Day, while the backrib, Sparerib, and Loin will continue to remain at current to higher prices in the short term.</i>
Pork (Value-Added)	Decreasing	Available - Steady	<i>Bacon prices should decline through the end of June.</i>
Poultry (Chicken)	Mixed	Available – Steady	<i>Pricing on breast meat and wings have remained steady while tenderloins continue to increase. Availability is tight on jumbo breast meat and tenderloins.</i>
Poultry (Turkey)	Increasing	Short – Steady	<i>Avian Influenza continues to plague the turkey industry. Pricing has remained steady for the most part, but all parts of the bird are well accounted for and hard to uncover. However, Tom breast meat pricing is on the rise.</i>
Seafood	Product of China, Canada, and Mexico - Increasing	Mixed	<i>Tariffs are once again uncertain, but overall prices across all species is on the increase while importers work out the complications of the on again off again tariff war.</i>
Butter	Increasing	Available - Steady	<i>Domestic butter demand ranges from steady to stronger, with notable increases from contractual buyers and robust interest from international markets. Cream supplies are more than sufficient across regions, supporting steady or strong butter production schedules. In the East, cream production is stable, spring flush has peaked, and churns are operating near capacity, while retail butter sales have increased alongside a surge in market activity due to higher CME prices. The Central region sees steady milk output and ample cream availability, with active butter churning and bullish market sentiment driven partly by lower year-over-year cold storage inventories. In the West, butter churning is steady or stronger despite some milk production declines, and while domestic and export demand remain strong, food service demand is below expectations. Overall, butter inventories are up month-to-month but remain below year-ago levels, reflecting tight supplies and continued market activity. Source: USDA AMS as of May 30</i>
Cheese	Increasing	Available - Steady	<i>Cheese production across the nation is steady to stronger, with cheesemakers maintaining busy schedules and ample spot milk available in most regions. CME cheese prices have risen, reflecting higher values for both barrel and block cheese compared to last week. Domestic demand is steady to stronger, especially for retail and commercial products, while international demand remains robust. Cheese inventories have increased this month but remain below year-ago levels, with current stocks considered healthy and sufficient to meet demand. In the East, milk supplies are ample due to the spring flush, and cream cheese production is steady, while in the Central region, retail and export demand are both strengthening. The West reports mixed spot milk availability, but cheese production is steady to stronger and inventories are tight for spot buyers, with domestic and international demand ranging from steady to strong. Source: USDA AMS as of May 30</i>
Fluid Dairy	Class I -Increasing Class II - Increasing	Class I Available - Steady Class II Available - Steady	<i>Class I: Cost Increase on Milks in June. Class II: Cost Increase on Cream & Cultured in May.</i>
Canned Vegetables - Root Crops	Increasing	Short - Strong	<i>Availability and supply challenges starting to take place and will be present into new pack 2025 for select items involving canned root crop categories such as Beets, Carrots, Potatoes, and Mixed Vegetables.</i>
Canned Vegetables - Veri Green Beans	Increasing	Short - Strong	<i>Availability and supply challenges are present on 6/10 Veri Green Beans which will last until new pack in July 2025.</i>
Canned Vegetables - Whole Beets	Increasing	Short - Strong	<i>6/10 Small Whole Beets will be out of stock until the 2025 pack due to lack of available raw product tonnage.</i>

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Oils/Shortening	Mixed	Available - Steady	<i>Soybean oil has traded at slightly lower levels (in the stock markets) in recent days. That has lead to some price softening in foodservice versus the extreme high prices that oilseed products have been trading since April. It is largely expected that we will see similar r pricing as we start the month of June. However, no dramatic changes are expected as the volatile of world politics still weighs on the markets. Canola Oil products will likely follow a similar trend to Soy in the coming days. Based on the volatile experienced in May, Blended Oil products and Premium products will likely show some price increases as manufacturers work through the high priced oil contracts purchased for the oilseed components. Palm markets have held steady in recent weeks and we will likely see only small changes in the price of Margarine. Tariffs do continue to impact pricing on Palm Products. Tallow price levels have remained relatively steady (albeit very high) and it is expected that we will see much of the same as we move through the month.</i>
Produce	Lower - Strawberries Steady - Apples, Avocados, Broccoli, Iceberg, Romaine, Onions, ID Russets Higher - Lemons, Tomatoes, Oranges, Bell Peppers	Increasing/Steady - Strawberries Steady/Steady - Apples, Broccoli, Bell Peppers, Romaine, Iceberg, ID Potatoes, Onions Short/Strong - Avocados, Lemons, Tomatoes, Oranges	<i>Apples, market is steady due to strong supplies. Ample small sized fruit. Avocados, Market stable , Peru, CA, & MX producing. 48ct & up >60ct. Bell Peppers, market higher, GA in full swing, NC starts late June. Broccoli, Salinas market steady, strong supplies, quality excellent. Iceberg, Salinas supplies > demand. Very good quality, 39-44 lbs. Romaine, Salinas supplies are plentiful, strong quality. Tomatoes, eastern supplies declining. GA to start soon. Market higher. Strawberries, Salinas/Watsonville production > demand, prices lower. Oranges, CA Navels finished. Valencias (seeds) shipping. Lemons, CA market strong. Sizing large, 140sz and smaller tight. Onions, new crop CA & NM now shipping. Quality average. ID storage Russet FOBs remain low and steady. Good quality.</i>
Sugar	Steady	Available - Steady	<i>Domestic Sugar Markets continue to show similar to slightly lower pricing levels to those seen in recent months. The 2024 harvest still offers enough product to cover seasonal demand domestically. For the first time in a few years, Beet Sugar is in strong supply which has caused the pricing of both cane and beet (domestically harvested) sugar to maintain competitive pricing. Raw Sugar Imports used to produce National Brand Cane Sugar (Domino) remains at a steady level. Though Tariffs may impact such, there is no concern of major price increases overall at this time. Mexican imports remain slow based on a poor crop year below the border. The upcoming Mexican harvest is not looking abundant. Thus we do expect more of the same in the coming months.</i>
Shell Eggs	Decreasing	Available - Steady	<i>As of May 23 USDA AMS reports 33.5MM egg-layer losses in 2025 due to Highly Pathogenic Avian Influenza (HPAI). Total 2024 egg layer losses were nearly 40MM. On May 28 USDA AMS reported shell egg demand saw modest improvement recently, partly due to limited Memorial Day weekend promotions at some major grocers. Wholesale prices for both loose caged eggs and carton stock are lower, reflecting light to moderate demand and moderate supplies. Trading activity is generally slow to moderate across the board. Breaking stock prices are also lower, with light demand and moderate supplies as schedules return to full-time. Preliminary retail surveys show a sharp drop in activity for both caged and cage-free eggs, though average advertised prices moved in opposite directions—up for caged and down for cage-free. Overall, the market is characterized by sluggish trading, moderate supply, and mixed price signals at retail.</i>
Wheat (Flour Based Products)	Steady	Available - Steady	<i>Pricing on bulk flour products will likely remain relatively steady as we move through early June. There may be some slight price decreases in some markets, but nothing major overall. The spring crop planting has been progressing according to schedule, which has kept the Wheat Markets trading at steady levels.</i>
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Beef (Commodity)	Steady	Short - Mixed	<i>Buyers remain on the sidelines waiting for signs of meaningful market momentum. So far, nothing. Deep cuts in the weekly harvest rate continue as packers hold back supply despite entering highest Beef demand period of the year. There are no signs the tone of the market will change into June.</i>
Pork (Commodity)	Increasing	Available - Strong	<i>Retail demand for popular grilling meats - Spareribs, St. Louis Spareribs, backribs, an loin are on the rise. The butt is on the rise through Independence Day.</i>
Pork (Value-Added)	Steady	Available - Steady	<i>The price of bacon is relatively stable now through the end of June.</i>
Poultry (Chicken)	Mixed	Available – Steady	<i>Pricing on breast meat and wings have remained steady while tenderloins continue to increase. Availability is tight on jumbo breast meat and tenderloins.</i>
Poultry (Turkey)	Increasing	Short – Steady	<i>Avian Influenza continues to plague the turkey industry. Pricing has remained steady for the most part, but all parts of the bird are well accounted for and hard to uncover. However, Tom breast meat pricing is on the rise.</i>
Seafood	Product of China - Increasing	Mixed	<i>Tariffs are a growing threat across key seafood items. Chinese-processed cod, haddock, flatfish, Red Swimming Crab will see tariffs jump from 20% to 170%, pressuring costs and availability. Snow Crab from Newfoundland is now available and declining as the domestic distribution pipeline fills up. Due to shifting buyer behavior due to the sweeping tariffs, all seafood in general is on the rise, no matter the country of origin.</i>
Butter	Steady	Available - Steady	<i>Domestic butter demand is steady across the nation, with an expectation for increased food service demand during Memorial Day weekend. Export demand remains strong, supported by ample cream availability and competitive U.S. butter prices. In the East, cream production is steady and butter inventories are healthy, while in the Central region, cream is plentiful and butter makers are operating near capacity. The West also benefits from sufficient cream for butter production. Overall, butter inventories are rising in most regions, and both domestic and international sales are expected to remain robust. Stakeholders are optimistic about continued healthy demand, especially from the food service sector. Source: USDA AMS as of May 23</i>
Cheese	Increasing	Available - Steady	<i>Cheese production is strong across the East as milk bottling slows and cheesemakers process more milk, though the spring flush is nearing its end and prices are trending upward. In the Central region, retail and food service demand are steady to stronger, with busy production schedules ahead of some planned holiday downtime and mixed spot load activity for cheese curds. Out West, Class III milk availability is increasing as bottling demand lightens, but cheese production schedules and availability are mixed, with some spot inventories remaining tight. Overall, domestic retail demand is robust, while food service demand is steady or less robust compared to retail. International demand is notably stronger in the West. Cheese inventories are generally holding steady, and the market is accommodating current demand levels. Source: USDA AMS as of May 23</i>
Fluid Dairy	Class I - Decreasing Class II - Decreasing	Class I Available - Steady Class II Available - Steady	<i>Class I: Cost decrease on Milks in May. Class II: Cost decrease on Cream & Cultured in May.</i>
Canned Vegetables - Root Crops	Increasing	Short - Strong	<i>Availability and supply challenges starting to take place and will be present into new pack 2025 for select items involving canned root crop categories such as Beets, Carrots, Potatoes, and Mixed Vegetables.</i>
Canned Vegetables - Veri Green Green Beans	Increasing	Short - Strong	<i>Availability and supply challenges are present on 6/10 Veri Green Green Beans which will last until new pack in July 2025.</i>
Canned Vegetables - Whole Beets	Increasing	Short - Strong	<i>6/10 Small Whole Beets will be out of stock until the 2025 pack due to lack of available raw product tonnage.</i>
Oils/Shortening	Mixed	Available - Steady	<i>As market volatility continues, traders are still watching to see what will happen next. Soy Oil is still trading at higher levels than we have seen in over a year. The slow and steady climb that we have seen since early March will need to reverse at some point. But for now no one really knows when that will occur. Prices will likely show slight increases or decreases at the local level depending on the timing of oil purchases. But overall, no one is expecting to see major price events occurring in the near term. The spring crops are still going into the ground and the total planted acreage is still expected to be as originally planned for most crops. The market is still mostly trading on speculation regarding potential Biofuel policy and World Politics. Expect more of the same in the near term with steady product availability in all domestic oilseed products. Tallow continues to show strong pricing and adequate (but not abundant) supply. The only market that does continue to show softening is Palm. Even with the imposed tariffs on Palm, the pricing has held steady to slightly down in recent days and will likely continue as such as we move into June. That is good news for users of Margarine and Cube Shortening products.</i>

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Sugar	Steady	Available - Steady	<i>Domestic Sugar Markets continue to show similar pricing levels to those seen in recent months. The 2024 harvest still offers enough product to cover seasonal demand domestically. For the first time in a few years, Beet Sugar is in strong supply which has caused the pricing of both cane and beet (domestically harvested) sugar to maintain competitive pricing. Raw Sugar Imports used to produce National Brand Cane Sugar (Domino) remains at a steady level. Though Tariffs may impact such, there is no concern of major price increases overall at this time. Mexican imports remain slow based on a poor crop year below the border. The upcoming Mexican harvest is not looking abundant. Thus we do expect more of the same in the coming months.</i>
Shell Eggs	Decreasing	Available - Steady	<i>As of May 23 USDA AMS reports 33.5MM egg-layer losses in 2025 due to Highly Pathogenic Avian Influenza (HPAI). Total 2024 egg layer losses were nearly 40MM. On May 28 USDA AMS reported shell egg demand saw modest improvement recently, partly due to limited Memorial Day weekend promotions at some major grocers. Wholesale prices for both loose caged eggs and carton stock are lower, reflecting light to moderate demand and moderate supplies. Trading activity is generally slow to moderate across the board. Breaking stock prices are also lower, with light demand and moderate supplies as schedules return to full-time. Preliminary retail surveys show a sharp drop in activity for both caged and cage-free eggs, though average advertised prices moved in opposite directions—up for caged and down for cage-free. Overall, the market is characterized by sluggish trading, moderate supply, and mixed price signals at retail.</i>
Wheat (Flour Based Products)	Steady	Available - Steady	<i>As recently reported, pricing on bulk flour products will likely not show much change through the month. Based on wheat trading, we may see some slight increases as we look into June. However, there is no major change expected in bulk flour products regardless of protein level. Products made using wheat/flour as a primary ingredient are less susceptible to market changes. We are not foreseeing any major price changes in these products as we move into early summer.</i>
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Beef (Commodity)	Steady	Short - Mixed	Memorial weekend is upon us. Buyers remain on the sidelines waiting for signs of meaningful market momentum. So far, nothing. Deep cuts in the weekly harvest rate continue as packers hold back supply despite entering highest Beef demand period of the year. There are no signs the tone of the market will change into June.
Pork (Commodity)	Increasing	Available - Strong	Retail demand for popular grilling meats - Spareribs, St. Louis Spareribs, backribs, an loin are on the rise through Memorial Day. The butt is on the rise through Independence Day.
Pork (Value-Added)	Steady	Available - Steady	The price of bacon is relatively stable now through the end of June.
Poultry (Chicken)	Mixed	Available – Steady	Pricing on breast meat and wings have remained steady while tenderloins continue to increase. Availability is tight on jumbo breast meat and tenderloins.
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Seafood	Product of China - Increasing	Mixed	Tariffs are a growing threat across key seafood items. Chinese-processed cod, haddock, flatfish, Red Swimming Crab will see tariffs jump from 20% to 170%, pressuring costs and availability. Snow Crab from Newfoundland is now available and declining as the domestic distribution pipeline fills up. Due to shifting buyer behavior due to the sweeping tariffs, all seafood in general is on the rise, no matter the country of origin.
Butter	Steady	Available - Steady	Butter production remains strong across the East, Central, and West regions, supported by steady to ample cream supplies. In the Northeast, spring flush maintains heavy cream availability, allowing churns to run at full capacity and balancing inventories near capacity. The Midwest sees plentiful cream despite some quality concerns from rising temperatures, with butter makers operating at or near capacity and increasing exports due to favorable domestic pricing. In the West, cream volumes are ample despite seasonal milk declines, with active churns and ongoing inventory building. Overall, domestic demand is steady to strong, and export interest continues to grow, helping to manage inventory levels. Source: USDA AMS as of May 16
Cheese	Increasing	Available - Steady	In the East, milk supplies are steady to high due to the spring flush, supporting strong cheese and cream cheese production, with increasing retail and some export sales, and healthy inventories. The Central region reports strong retail cheese sales but softer food service demand, while export demand is strengthening. Milk output is at or near its seasonal peak in the Midwest, supporting active cheese production, though spot milk availability varies and cheese inventories are somewhat tight. In the West, milk production is declining seasonally but still sufficient for steady cheese manufacturing, with mixed availability from producers and distributors. Demand is somewhat stronger overall, with export demand having a greater influence on prices than domestic demand. Domestic cheese prices remain competitive compared to international prices. Source: USDA AMS as of May 16
Fluid Dairy	Class I - Decreasing Class II - Decreasing	Class I Available - Steady Class II Available - Steady	Class I: Cost decrease on Milks in May. Class II: Cost decrease on Cream & Cultured in May.
Oils/Shortening	Mixed	Available - Steady	Though we have seen erratic changes in soybean oil as traded in the stock markets the past couple of weeks, this has not translated into much of a change in the price of a JIB of Soy Oil in Foodservice. At this time, we will likely see some slight decreases in pricing over the next couple of weeks. However we will likely not see much of a price move in general. Domestic spring crops are ahead of planting schedule and it is expected that we will have a larger amount of acreage of soy and corn planted this year. Canola Oil markets are also showing some slight declines as the Canadian crop appears to be as expected. Tallow prices remain elevated as previously communicated with no expected decreases any time soon. Margarine prices will likely not show much of a change while imposed tariffs on the Palm (primary ingredient in margarine) to hold as originally introduced.

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Sugar	Steady	Available - Steady	<i>Bulk Sugar prices have remained relatively steady in recent weeks. The forecast for spring is for much of the same. Pricing levels are much lower than they were this time last year. The 2024 harvest left us with solid supply and the spring crop planting is expected to be uneventful at this point. This leaves us in a pretty solid supply position as we move into summer. Mexican Sugar imports will be limited this year as Mexico is experiencing another tough weather year. This should have minimal impact on US supply or pricing at this point.</i>
Shell Eggs	Increasing	Available - Steady	<i>As of May 16 USDA AMS reports 31.3MM egg-layer losses in 2025 due to Highly Pathogenic Avian Influenza (HPAI). Total 2024 egg layer losses were nearly 40MM. On May 21 USDA AMS reported demand declined over the past week. However, some national chains are running features into the holiday weekend at attractive pricing which may help to reverse the trend in the near-term. Wholesale prices for negotiated trading of loose caged eggs are weak to lower with light to moderate demand. for moderate offerings and supplies. Trading is moderate. Wholesale prices for formula trading of carton stock are lower on light to moderate demand for available offerings. Wholesale breaking stock prices are lower with light to moderate demand and offerings. Supplies are moderate with varied schedules. The preliminary survey of retail outlets indicates increased activity into the holiday weekend on both caged and cage-free types with a decrease in the average retail ad price.</i>
Wheat (Flour Based Products)	Steady	Available - Steady	<i>As recently reported, pricing on bulk flour products will likely not show much change through the month. Based on wheat trading, we may see some slight increases as we look into June. However, there is no major change expected in bulk flour products regardless of protein level. Products made using wheat/flour as a primary ingredient are less susceptible to market changes. We are not foreseeing any major price changes in these products as we move into early summer.</i>
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