

CATEGORY	NEAR-TERM MARKET PRICING TREND	SUPPLY vs. DEMAND	DSR MARKET INSIGHTS COMMENTARY
Beef (Commodity)	Stable	Available - Steady	<i>Peak of the Foodservice selling season is here. Capture customer holiday volume early. This years selling season will conclude quickly. Sharp seasonal price adjustment will follow on ribs and tenderloins. Secure customer holiday volume ASAP. Beat your competition to the "sales" punch</i>
Butter	Decreasing	Available - Strong	<i>Butter has come off recent highs, with orders for the holiday season starting to wind down. Sentiment remains that we may see some possible relief in the early part of next year.</i>
Fluid Dairy	Decreasing - Class 1 Increasing - Class 2	Available - Steady - Class 1 Short - Strong - Class 2	<i>December Milk (Class I) dropped a few cents per gallon. Cultured (Class II) products are higher. Cream production is extremely short, especially UHT. May have to offer fresh cream as an alternative. Fluid dairy shortage expanding across the southeast and north central areas. Five 5 major plants closed in 2022. FL, SC, AL, MS & IL.</i>
Cheese	Stable	Available - Steady	<i>A bit of relief off recent market pricing highs in blocks came last week. Demand has remained steady for blocks, and thus support pricing closer to recent highs rather than notable decreases. Barrels are a different story: pricing has decreased as blocks have risen - sentiment is that negative correlation in pricing is driven primarily by higher demand for blocks, and relatively less demand for barrels.</i>
Oils/Shortening	Stable	Available - Steady	<i>Commodity oil products (all soy and canola products) are still selling at elevated levels as they have in recent months. It is expected that the government requirements for soy and canola use in bio-fuels will be released later this week. This announcement could impact future pricing levels for both oils as we move into the new year. Pricing levels on premium products have not changed recently and are not expected to decrease as we move into early 2023. All products are in adequate supply except for high oleic oils; which remain in tight supply.</i>
Pork (Commodity)	Stable	Available - Steady	<i>Supplies of butts, ribs and loins are good with retailers focused on holiday proteins. Prices for the same are all relatively stable now through the end of November.</i>
Pork (Value-Added)	Mixed	Available - Weak	<i>Ham prices are high due to the shortage of turkeys and increased demand for the Thanksgiving holiday, closely followed by Christmas. Prices for sausages, franks and pizza toppings should remain stable for the short term.</i>

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Poultry (Chicken)	Decreasing	Available – Steady	<i>Boneless breast meat prices have remained stable this week. Spot availability is showing on all sizes. Wing prices have remained steady on all sizes. Tenders have also stabilized in price with availability showing. Demand on whole chickens and WOGS remains steady with little spot availability showing. Demand for the back half of the bird has declined with spot availability showing on all parts.</i>
Poultry (Turkey)	Stable	Short – Strong	<i>Breast meat prices remain at record highs, as do the rest of the parts of the bird. Availability on whole toms and hens is scarce with prices remaining at all time highs. This trend is expected to continue through the end of the year. HPAI is beginning to become more widespread again which is going to significantly affect supply for the remainder of the year and into 2023.</i>
Produce	Decreasing - Onions Steady - Avocados, Strawberries & Oranges Increasing - Broccoli, Iceberg, Romaine, Idaho Potatoes & Tomatoes	Available - Steady - Oranges, Avocados & Onions Available - Strong - Idaho Russet Potatoes Short - Strong - Strawberries, Broccoli, Iceberg, Romaine & Tomatoes	<i>Iceberg & Romaine's transition to new crop Yuma, AZ product is complete. Cool temperatures slowed growth. Lettuces are light weight. Despite all-time high markets, demand had not decreased. Value Added Lettuces are at all-time highs. Relief is possible in 3 weeks. Tomatoes demand exceeds supplies. Expected inflated prices through January. Strawberries' demand exceeds supplies. New growing areas to start mid-Dec. Quality fair. Avocado's Mexico supply is good prices and quality supplies. Broccoli very limited supplies. Some quality issues as well. Oranges in California, new crop Navels are now the primary variety. Onions in ID/OR supplies ample, quality good. Col & Supers are tight. Idaho Russet Potatoes, quality excellent. Prices remain elevated due to a short fall harvest. No relief expected until August '23.</i>
Seafood	Crab Decreasing	Crab Mixed - Decreasing	<i>Both blue and red pasteurized crab meat continue to decline. Demand is decreasing while supply is mostly steady.</i>
Shell Eggs	Increasing	Available- Strong	<i>Over the past week we received word from Michael Foods regarding an Avian Influenza (AI) outbreak at one of their northeastern Nebraska farms; in Dixon County. Around 1.7MM birds will be depopulated. This is in addition to previously we reported AI outbreaks at two different farms in Iowa within the same vicinity. Sentiment remains that Avian Influenza is the biggest risk, with lower supply supporting higher prices.</i>
Bulk Sugar	Increasing	Mixed - Strong	<i>The beet sugar crop is not as abundant as originally anticipated. This has put pressure on both beet and cane sugar prices in many markets. Pricing on bulk sugar products will likely remain near current high levels through year-end and into early 2023. There is little potential for price decreases in the near-term.</i>

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Wheat (Flour Based Products)	Stable	Available - Strong	<i>Pricing on wheat based products (flour based) continues to be at higher than historic levels based on worldwide availability concerns. Domestic-planted wheat crops appear to be in good shape at this time. Crop progress will be watched on winter wheat in the coming months and could determine changes in pricing levels on flour as we move through the spring.</i>
Disposables (Can Liners)	Increasing	Available - Steady	<i>Natural gas has become short in the market creating upward price pressure. Natural gas is used to blow the bubble that creates the can liner as a key component during manufacturing. Expect continued upward pressure throughout the winter.</i>
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Beef (Commodity)	Stable	Available - Steady	<i>Peak of the holiday pricing on tenderloins and rib eyes are here. Packers are in the midst of shipping volume of both items to retail this week and next. Packers are focused on secure forward sales positioning for December</i>
Butter	Stable	Available - Strong	<i>After drifting lower two weeks ago, the butter market was up and down with notable swings. Sentiment is that we'll stay around the bottom of the recent lows. We typically experience a purchasing cycle toward year-end, and that is expected to keep markets elevated before we see some possible relief in the early part of 2023, possibly as soon as December.</i>
Fluid Dairy	Increasing - Class 1 Increasing - Class 2	Available - Steady - Class 1 Short - Strong - Class 2	<i>Milk (Class I) and Cultured (Class II) products are higher for November are in place. Price paid to the dairy farmer is up as well as cost increases on packaging, fuel and labor. Cream production is still very short, with the northeast suffering the most. Fluid dairy shortage expanding across the southeast and north central areas. Five 5 major plants closed in 2022. FL, SC, AL, MS & IL.</i>
Cheese	Stable	Available - Strong	<i>Block and barrel markets have been stable over the past week. Demand has been steady as well. There is sentiment that the availability of raw milk supply has allowed pricing to come off recent highs.</i>
Oils/Shortening	Stable	Available - Strong	<i>Prices on commodity oil products (soybean and canola) have decreased slightly in recent days based on softening exports. It is expected that there will be no major change in these prices as we move through the remainder of the year. Prices on premium shortening and oils (blends and liquid butter products) are still selling at elevated levels. Supply levels in the US are in good shape at this time. Prices remain high based on world events and speculation that the US Government will require a large amount of soy oil to be used for biofuels in the new year. This could tighten supply the supply of oil for food.</i>
Pork (Commodity)	Stable	Available - Steady	<i>Supplies of butts, ribs and loins are good with retailers focused on holiday proteins. Prices for the same are all relatively stable now through the end of November.</i>
Pork (Value-Added)	Mixed	Available - Weak	<i>Ham prices are high due to the shortage of turkeys and increased demand for the Thanksgiving holiday, closely followed by Christmas. Prices for sausages, franks and pizza toppings should remain stable for the short term.</i>

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Produce	Decreasing - Onions Steady - Avocados, Strawberries & Oranges Increasing - Broccoli, Iceberg, Romaine, Idaho Potatoes & Tomatoes	Available - Steady - Oranges, Avocados & Onions Available - Strong - Idaho Russet Potatoes Short - Strong - Strawberries, Broccoli, Iceberg, Romaine & Tomatoes	<i>Iceberg & Romaine supplies are very limited due to weather, insects and disease during the Salinas season. Expect very inflated pricing through November. The transition to new crop Yuma, AZ product is mostly complete. Despite all-time-high markets, demand had not decreased. Value Added Lettuces are at all-time highs. Relief expected in December. Tomatoes supply and quality is reduced due to severe weather in Florida and Mexico. Expected inflated prices through end of 2022. Strawberries' demand exceeds supplies for 5th straight week. Heavy rains in CA making situation worse. Quality fair. Avocado's Mexico supply is peaking and good prices and quality supplies. Broccoli very limited supplies. Some quality issues as well. Oranges in California, new crop Navels are now the primary variety. Onions in ID/OR supplies ample, quality good. Col & Supers are tight. Russet potatoes' Idaho new crop quality good. Expect another short supply season, through August '23. New crop peaking on 80sz.</i>
Seafood	Crab Decreasing	Crab Mixed - Decreasing	<i>Both blue and red pasteurized crab meat continue to decline. Demand is decreasing while supply is mostly steady.</i>
Shell Eggs	Stable	Available- Strong	<i>We had another report of Avian Influenza this past week, with a farm in Iowa being directly affected by depopulation to the tune of 1.1MM birds. The concern beyond this farm is that there are many other chicken farms in the area as well as migratory birds. Be advised that it is anticipated this will affect supply of not only eggs, but chicken as well. Over the past month we have identified Avian Influenza as the biggest risk to support for lower supply and higher prices.</i>
Bulk Sugar	Increasing	Mixed - Strong	<i>The beet sugar crop is not as abundant as originally anticipated. This has put pressure on both beet and cane sugar prices in many markets. Pricing on bulk sugar products will likely remain near current high levels through year-end and into early 2023. There is little potential for price decreases in the near-term.</i>

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Disposables (Polypropylene)	Stable	Available - Steady	<i>Polypropylene resin saw significant export sales over the past week coupled with resin plants running at 75% capacity. This is an attempt to clear backlogs of polypropylene resin to raise prices. Until that happens, black bottom and clear top hinged polypropylene vented clam shells should be a cost benefit "to go" option today.</i>
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Cheese	Stable	Available - Strong	<i>Block and barrel markets have been stable over the past week. Demand has been steady as well. There is sentiment that the availability of raw milk supply has allowed pricing to come off recent highs.</i>
Canned Vegetables (Tomatoes-West Coast)	Increasing	Short - Strong	<i>California tomato processors final tonnage figures will be one of the lowest in recent history due to weather related challenges during the season. Availability and supply challenges will likely be present until new pack 2023.</i>
Canned Fruits(Peaches, Pears, Mixed Fruits)	Increasing	Short - Strong	<i>Northwest and west coast processing tonnage for domestic pears and peaches came in under budget. Being the primary ingredients for fruit cocktail and fruit mixtures, availability and product allocations challenges may soon be present for these noted products until 2023 new pack</i>
Canned Pudding & Cheese Sauces	Stable	Short - Strong	<i>Industry wide shortages of modified food starch (used extensively in the production of puddings and cheese sauces) has limited availability and caused temporary out of stock situations. While starch supplies are now starting to improve, reestablishing production and inventories to a manageable level will take time. Availability challenges will be present into early 2023.</i>
Oils/Shortening/Margarine	Stable	Mixed - Strong	<i>Prices on commodity oil products (soybean and canola) have increased slightly in recent days. It is expected that there will be no major change in these prices as we move through the upcoming holiday. Prices on premium shortening and oils (blends and Liquid Butter products) are still selling at similar prices as they were during the summer months. Margarine prices have softened slightly in recent weeks and are not expected to change much through the holiday next week. 2022 domestic harvest has been completed with expected tonnage.</i>

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Bulk Sugar	Stable	Short - Strong	<i>Sugar is still in tight supply in some markets. This has caused domestic pricing to increase in recent weeks. Pricing on bulk sugar products will likely remain near current high levels through year-end and into early 2023. There is little potential for price decreases in the near-term.</i>

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