

CATEGORY	NEAR-TERM MARKET PRICING TREND	SUPPLY vs. DEMAND	MARKET INSIGHTS COMMENTARY
Beef (Commodity)	Increasing	Short - Mixed	<i>No significant changes have been reported in the Beef markets. We have entered the Q4 holiday period. Now is the time to focus on selling. The demand window will open and close quickly. Don't sit back. Sell. Packers increased harvest levels this week and last, but they have positioned themselves to capitalize on the Thanksgiving federal holiday by not running plants on Thursday, Friday, or Saturday. Coming out of the holiday, packers will short the market to extend elevated holiday pricing as far into December as possible. Stay aggressive. Sell.</i>
Pork (Commodity)	Decreasing	Available - Weak	<i>Butts, spareribs, boneless loins, and Backribs are forecast for mostly steady pricing, all with a slight price risk downward, through mid-December.</i>
Pork (Value-Added)	Decreasing	Available - Steady	<i>Bacon pricing should continue to decline through the end of the year, with the belly value forecast to decline another 15% by the first week of December.</i>
Poultry (Chicken)	Decreasing	Available - Steady	<i>The front half of the bird remained steady in price. The back half of the bird remains steady and supply is broadly available.</i>
Poultry (Turkey)	Increasing	Short – Strong	<i>Pricing continues to rise across the board for turkey. Availability is short of demand by far. This is expected to continue near term. Avian Influenza has begun to strike in various areas, likely to continue near term which further affects supply.</i>
Seafood	Increasing	Available - Steady	<i>On-again/off-again tariffs are creating volatility in seafood markets. Import costs are up, supply chains are inconsistent, and species availability varies. Demand remains steady, but uncertainty on trade policy is keeping buyers cautious and pricing unstable. Pasteurized Crab meat, Haddock, and Cod supply is on the decrease so shortages and price increases are expected.</i>
Butter	Decreasing	Available - Steady	<i>Domestic butter demand is steady to strong in the East, light to stronger in the Central, and mixed in the West, while international demand remains steady to strong. In the East, many manufacturers have shifted focus from retail to foodservice-sized packaging, with foodservice butter demand described as steady to strong. In the Central region, retail demand is rising with the holidays, but foodservice sales for butter remain light. The West shows manufacturers continuing high production but placing more emphasis on bulk and export markets, with little direct mention of foodservice activity; domestic demand here is mixed. Overall, strong export demand is influencing bulk butter availability, while foodservice demand is most robust in the East and subdued in the Central region. Source: USDA AMS as of November 14</i>
Cheese	Decreasing	Steady - Steady	<i>Cheese production across the U.S. remains steady, with manufacturers taking steps to keep inventories balanced and production aligned with regional milk supply and contract obligations. Foodservice demand is noted as soft or lighter, especially in the Central region, where retail orders are improving but foodservice sales have not seen the same strengthening. In contrast, processed cheese manufacturers, after completing holiday demand fulfillment, are back to normal schedules and mainly see steady retail movement rather than new foodservice momentum. While some regions report tightening in specific cheese varieties (like barrels), overall cheese availability varies, and stakeholders in the West are already fielding early interest from buyers wanting cheese supplies for early 2026. Export demand continues to lag behind domestic demand, partly pressured by international price competition, but domestic spot demand and overall production remain stable Source: USDA AMS as of November 14</i>
Fluid Dairy	Class I - Decreasing Class II - Increasing	Class I - Available - Steady Class II - Available - Steady	<i>Class I: Milks will decrease for November. Class II: Creams & Cultured will increase for November.</i>
Oils/Shortening/Margarine	Mixed	Available - Steady	<i>Based on News Stories and speculation thereof, the Soy Oil Trading markets to a short jump in pricing and then settled back down after reality set-in. Based on such, there will likely be little change in the price of a JIB of oil in the coming days. The price of Canola will follow this trend as well. Though we have seen some slight softening in the price of margarine and cube shortening (Palm Products) in recent days, there is likely no significant change on the horizon as we move into the holidays. Tariffs on the imports of Palm Oil are still in place with little change. Meat Fats are still selling at a premium as has been the trend all year. Product has become exceedingly tight on tallow in most markets. There is simply not enough supply to cover growing demand. It is highly recommended that Operators use other mediums as a primary source for frying and keep their purchases of tallow to a minimum until this situation changes.</i>

CATEGORY	NEAR-TERM MARKET PRICING TREND	SUPPLY vs. DEMAND	MARKET INSIGHTS COMMENTARY
Produce	Lower - Avocados, Broccoli, Lemons Steady - Apples, Avocados, Iceberg, Romaine, Value-Added Lettuces, Onions, Idaho Russets Higher - Oranges, Bell Peppers, Tomatoes, Strawberries	Improving/Steady - Broccoli, Lemons Good/Steady - Apples, Avocados, Onions, Idaho Russets Short/Strong - Oranges, Iceberg, Romaine, Value-Added Lettuces, Strawberries, Bell Peppers, Tomatoes	<p>Apples, tight supplies of smaller 125 & 138ct Apples.</p> <p>Avocados, MX market soft as ample fruit on trees + low demand.</p> <p>Bell Peppers, freeze knocked to GA & No FL crops. Market higher.</p> <p>Broccoli, supplies continue to improve. Market adjusting lower.</p> <p>Iceberg, Yuma harvest is light. Demand exceeds. Weights 34-39lbs.</p> <p>Value-Added at third tier of escalation. Market exceptionally high.</p> <p>Romaine, limited supplies, few Hearts. Light wts. Market very high.</p> <p>Tomatoes, freeze knocked out much of the southeast crop. South FL production survived but volume lower due to cool temps.</p> <p>Strawberries, limited supplies for a few more weeks until FL & MX start. Recent 5 day rain has quality at fair. Market exceptionally high.</p> <p>Oranges, Navel supplies lower as no harvest for 7 days due to rain.</p> <p>Lemons, new area harvest starting. 165/200ct tight.</p> <p>Onions, WA/ID/OR storage quality is good. Strong demand.</p> <p>ID Potato Bumper crop! Norkotahs mostly #1s. Market on floor.</p>
Sugar	Steady	Available - Steady	<p>Domestic Sugar prices have remained steady as we move through the heavy baking season. Current crop supply is steady to cover any increased holiday demand. The domestic harvest of both cane and beets is running as expected and at this time sucrose levels are looking good in both crops. If this trend continues throughout harvest (harvest typically concludes in late January), then pricing levels should remain steady longer term. Current import levels are not very strong for refined sugar based on typical government policy. This will likely remain through spring.</p>
Shell Eggs	Increasing	Available - Steady	<p>Shell egg demand has slowed following the peak of Thanksgiving baking season, with retailers shifting focus toward holiday meats and away from eggs, while trading activity remains moderate to active across most categories. In the foodservice sector, egg processors report muted demand for egg products as carton eggs absorb much of the available spot market supply, leading breakers to rely more on existing stocks and imports to maintain normal or slightly elevated production rates. Production of egg products typically slows toward year-end as in-shell egg demand rises for holiday use, and egg products stocks—including frozen and dried components—show mixed changes, with some categories up and others down from last year. The overall share of cage-free eggs in both processing and inventories continues to grow, with cage-free now making up 38.7% of the U.S. table egg flock, even in the face of losses from avian influenza outbreaks predominantly affecting both caged and cage-free operations.</p> <p>Eggs for foodservice are trading at steady rates, with adequate supplies and mostly full processing schedules, though overall demand from foodservice buyers remains light compared to the seasonal retail surge. Source: USDA AMS as of November 19</p>
Wheat (Flour Based Products)	Steady	Available - Steady	<p>The trading markets for wheat have been steady to slightly down over the past couple of weeks. Supply is still adequate to cover current demand. We are not expecting any significant changes as we move through the remainder of the month. Most finished goods that incorporate flour as a primary ingredient are maintaining steady pricing levels with no major changes expected in the near term.</p>
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Beef (Commodity)	Increasing	Short - Mixed	<i>No significant changes have been reported in the Beef markets. Consumer demand remains steady but soft. Higher prices continue to push consumers toward alternative protein categories. Buyers remain largely on the sidelines, waiting for stronger demand signals to justify increased purchasing activity. Seasonally, Ribeye and Tenderloin availability will begin to tighten, with prices expected to appreciate and remain firm into</i>
Pork (Commodity)	Decreasing	Available - Weak	<i>Butts, spareribs, boneless loins, and backribs are forecast for mostly steady pricing, all with a slight price risk downward, through mid-December.</i>
Pork (Value-Added)	Decreasing	Available - Steady	<i>Bacon pricing should continue to decline through the end of the year, with the belly value forecast to decline another 15% by the first week of December.</i>
Poultry (Chicken)	Decreasing	Available - Steady	<i>The front half of the bird remained steady in price. The back half of the bird remains steady and supply is broadly available.</i>
Poultry (Turkey)	Increasing	Short – Strong	<i>Pricing continues to rise across the board for turkey. Availability is short of demand by far. This is expected to continue near term. Avian Influenza has begun to strike in various areas, likely to continue near term which further affects supply.</i>
Seafood	Increasing	Available - Steady	<i>On-again/off-again tariffs are creating volatility in seafood markets. Import costs are up, supply chains are inconsistent, and species availability varies. Demand remains steady, but uncertainty on trade policy is keeping buyers cautious and pricing unstable. Pasteurized Crab meat, Haddock, and Cod supply is on the decrease so shortages and price increases are expected.</i>
Butter	Decreased	Available - Steady	<i>U.S. butter production is active across all regions, supported by strong milk and fat component levels that are yielding ample cream supplies for manufacturers. Domestic butter demand is steady or lighter depending on the region, while foodservice-specific buying has slowed post-holidays, with most vendors having met their seasonal shipment needs and retail packaging sales declining. In the Central region, foodservice and Class II processor demand for cream—important for products like cream cheese—remains strong, but this demand from butter makers is somewhat lighter compared to previous years. Export interest, especially for 82% butterfat butter, is robust and in many cases outpaces domestic production, keeping certain inventories tight even as overall butter inventory levels are expected to increase with slower sales. Loads of salted 80% butterfat butter are widely available nation-wide, but unsalted 80% loads remain relatively tight due to ongoing production and export pressure. Source: USDA AMS as of November 7</i>
Cheese	Increasing	Steady - Steady	<i>Cheese production across all U.S. regions remains steady with manageable inventories, as processors balance output with both retail and bulk orders, though production is slightly slowing as holiday commitments wind down. In the East, foodservice demand is not showing notable change, and processors report consistent, but not growing, orders from both retail and foodservice channels. In the Central region, foodservice sales are described as steady but softer than last year, with some cheesemakers noticing lighter interest for deliveries later in November and retail demand staying strong; supply remains sufficient due to steady milk availability. Western foodservice demand remains steady, although not particularly robust, with mozzarella inventories tighter than others and producers expecting a seasonal boost as holidays approach. Across all regions, export demand for cheese continues to be slow or quiet, with little anticipation of growth before the new year. Source: USDA AMS as of November 7</i>
Fluid Dairy	Class I - Decreasing Class II - Increasing	Class I - Available - Steady Class II - Available - Steady	<i>Class I: Milks will decrease for November. Class II: Creams & Cultured will increase for November.</i>
Oils/Shortening/Margarine	Mixed	Available - Steady	<i>Based on News Stories and speculation thereof, the Soy Oil Trading markets to a short jump in pricing and then settled back down after reality set-in. Based on such, there will likely be little change in the price of a JIB of oil in the coming days. The price of Canola will follow this trend as well. Though we have seen some slight softening in the price of margarine and cube shortening (Palm Products) in recent days, there is likely no significant change on the horizon as we move into the holidays. Tariffs on the imports of Palm Oil are still in place with little change. Meat Fats are still selling at a premium as has been the trend all year. Product has become exceedingly tight on tallow in most markets. There is simply not enough supply to cover growing demand. It is highly recommended that Operators use other mediums as a primary source for frying and keep their purchases of tallow to a minimum until this situation changes.</i>

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Sugar	Steady	Available - Steady	<p>Domestic Sugar prices have remained steady as we move through the heavy baking season. Current crop supply is steady to cover any increased holiday demand. The domestic harvest of both cane and beets is running as expected and at this time sucrose levels are looking good in both crops. If this trend continues throughout harvest (harvest typically concludes in late January), then pricing levels should remain steady longer term. Current import levels are not very strong for refined sugar based on typical government policy. This will likely remain through spring.</p>
Shell Eggs	Steady	Available - Steady	<p>Shell egg demand has strengthened due to the upcoming Thanksgiving baking season, prompting grocery retailers to run active promotions, while foodservice providers have shown moderate to good demand for both loose and carton stock eggs, and egg producers are maintaining steady production. In foodservice, egg producers continue to rely on their owned-production and imports to keep processing schedules full, typically avoiding the spot market as their supply is currently adequate heading into the holidays. Breaking stock, a key supply for foodservice, is experiencing light to very light demand and assorted supply levels, with breakers using the period to build inventory for finished products. Egg processing in foodservice reflects seasonal shifts: whole egg production has increased, while production of whites, yolks, and dried products mostly declined, and cage-free eggs now make up a growing share of eggs processed for further use. National egg production and inventory levels are mixed, with cage-free egg inventory and processing both rising, while retail promotions for conventional caged eggs have slowed after several weeks of heightened activity. Source: USDA AMS as of November 12</p>
Wheat (Flour Based Products)	Steady	Available - Steady	<p>The trading markets for wheat have been steady to slightly down over the past couple of weeks. Supply is still adequate to cover current demand. We are not expecting any significant changes as we move through the remainder of the month. Most finished goods that incorporate flour as a primary ingredient are maintaining steady pricing levels with no major changes expected in the near term.</p>
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Pork (Commodity)	Decreasing	Available - Weak	Butts, spareribs, boneless loins, and backribs are forecast for mostly steady pricing, all with a slight price risk downward, through mid-December.
Pork (Value-Added)	Decreasing	Available - Steady	Bacon pricing should continue to decline through the end of the year, with the belly value forecast to decline another 15% by the first week of December.
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Seafood	Increasing	Available - Steady	On-again/off-again tariffs are creating volatility in seafood markets. Import costs are up, supply chains are inconsistent, and species availability varies. Demand remains steady, but uncertainty on trade policy is keeping buyers cautious and pricing unstable. Pasteurized Crab meat, Haddock, and Cod supply is on the decrease so shortages and price increases are expected.
Butter	Steady	Available - Steady	The butter market is seeing strong domestic demand in the East, while demand is steady in the West and lighter in the Central region. Food service and retail demand is particularly good in the East, where plants are operating at full capacity and contacts highlight robust food service interest alongside rising inventories. Across all regions, ample cream is supporting heavy butter production schedules, with foodservice usage helping draw down supplies, especially in the East. In the Central region, cream is increasingly going to cream cheese and Class II processors rather than directly to butter makers, slightly easing spot butter activity. Overall, foodservice packaging remains a significant driver of market activity, underpinned by continued operations geared toward meeting foodservice and holiday needs. Source: USDA AMS as of October 31
Cheese	Increasing	Steady - Steady	Cheese markets are maintaining balanced conditions overall, with steady production and sufficient milk supplies reported across regions. Retail and bulk sales are strong in the East, helping absorb available inventory, but export demand is expected to remain slow until after the new year. In the Central region, mozzarella demand is firm and export interest—especially from Mexico—is improving, yet domestic spot market activity outside of foodservice channels has slowed. Foodservice demand in the West is notably softer compared to last year, and industry stakeholders report subdued activity in this sector, with holiday retail promotions not driving significant increases. While cheese manufacturers are focused on fulfilling contract volumes, current trends indicate that foodservice sales are lagging behind other market segments. Source: USDA AMS as of October 31
Fluid Dairy	Class I - Decreasing Class II - Increasing	Class I - Available - Steady Class II - Available - Steady	Class I: Milks will decrease for November. Class II: Creams & Cultured will increase for November.
Oils/Shortening/Margarine	Steady	Available - Steady	Soybean Oil has prices have softened slightly in the stock markets in recent days due to solid soybean harvest, lack of a final ruling on the Biofuel policy and the fact that China has not yet begun purchasing soybeans from the US. It is not expected that we will see much change in the stock trading levels in the near term. Thus, the slightly lower pricing levels that we have seen on Soy Oil in Foodservice, will likely continue in most markets. Demand is steady, but not necessarily as robust as once predicted. As is usual, other Oilseed based products are following the Soy Oil Trend. Palm Oil imports have been relatively steady and raw material costs have declined slightly based on solid supply levels. Tariffs are still in place on Palm at the same levels that we have experienced in recent weeks. Thus, margarine prices will likely remain steady to slightly lower in the coming days. Meat Fats (particularly Tallow) remain at all-time-high pricing levels based on extraordinarily strong demand and no expectation of increases supply (cattle) anytime soon. Avocado Oil is becoming more prevalent as an alternative to Oilseed products, through that pricing remains high as well.
Produce	Lower - Avocados, ID Russets Steady - Apples, Oranges, Broccoli, Bell Peppers, Onions, Tomatoes Higher - Iceberg, Romaine, Value-Added Lettuces, Strawberries, Lemons	Improving/Steady - Oranges Good/Steady - Apples, Avocados, Bell Peppers, Onions, Tomatoes, Idaho Russets Short/Strong - Broccoli, Iceberg, Romaine, Value-Added Lettuces, Strawberries, Lemons	Apples, moderate to light supplies of smaller 125 & 138ct Apples. Avocados, MX market soft as ample fruit on trees + low demand. Bell Peppers, strong supplies from southeastern states. Broccoli, limited but improving supplies. Market is high but easing. Iceberg, demand exceeds. Light weight 32-35lbs. Market exceptional. Value-Added t third tier of escalation. Market exceptionally high. Romaine, very ltd., few Hearts. Light wts. Market exceptionally high. Tomatoes, FL strong supply, MX light but increasing. Nice quality. Strawberries, limited supplies. Quality Fair. Market exceptionally high. Oranges, New Crop Navels ramping up. Peaking on 72/88/113ct. Lemons, market strong. CA tight, 165 & 200 scarce. Some soft & decay. Onions, WA/ID/OR good quality. Strong demand. ID Potatoes, bumper crop! Norkotah mostly #1s. Market is on the floor.

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Sugar	Steady	Available - Steady	<i>Domestic Sugar prices have remained steady as we move through the heavy baking season. Current crop supply is steady to cover any increased holiday demand. The domestic harvest of both cane and beets is running as expected and at this time sucrose levels are looking good in both crops. If this trend continues throughout harvest (harvest typically concludes in late January), then pricing levels should remain steady longer term. Current import levels are not very strong for refined sugar based on typical government policy. This will likely remain through spring.</i>
Shell Eggs	Steady	Available - Steady	<i>The shell egg market is experiencing steady to firm demand with active retail featuring of conventional caged eggs nationwide ahead of the Thanksgiving baking season. Wholesale trading of loose and cartoned eggs remains firm to higher due to moderate to good demand, while breaking stock prices are steady with light to very light demand. Supplies are in a full range but generally adequate, supporting moderate trading activity. Food service demand is noted as light to very light but with steady prices and moderate market activity. Retail promotions are encouraging early holiday prep, with grocers sharply dropping ad prices for conventional caged eggs to boost consumer interest. Source: USDA AMS as of November 5</i>
Wheat (Flour Based Products)	Steady	Available - Steady	<i>The trading markets for wheat have shown slightly lower levels in recent days. As harvest was completed as expected, supply is adequate to maintain supply based on current demand. This has lead to slightly lower pricing on commodity bulk flour products in many markets. We are not expecting any significant changes as we move through the remainder of the baking season beyond this. Most finished goods that incorporate flour as a primary ingredient are maintaining steady pricing levels with no major changes expected in the near term.</i>
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