

CATEGORY	NEAR-TERM MARKET PRICING TREND	SUPPLY vs. DEMAND	DSR MARKET INSIGHTS COMMENTARY
Beef (Commodity)	Decreasing	Short - Steady	<i>Packers are entering a season of negative margins. Each employing strategy to reduce or mitigate losses. Packers are expected to reduce harvest levels further as financial losses stack up and take a toll. Expect near term price easing within the Beef complex, driven by light demand. By mid-October the big footprint of Retailer and Club stores will return. Packer will not increase harvest levels to accommodate Q4 demand. Expect turbulence ahead.</i>
Butter	Increasing	Available - Strong	<i>Cream supplies are tight throughout the country, and contacts in the East report demand from butter makers is outpacing cream supply. Butter churning is somewhat active in the Central region. East region butter makers say labor issues have interrupted some production schedules. Meanwhile in the West, contacts report mixed butter production as some churns are running steadily, while tight cream volumes are causing some butter makers to run below capacity. Demand for butter from retail and food service customers is steady to strong. Contacts in the Central region say butter interest is unchanged and meeting expectations for this time of year. Source: USDA AMS as of September 15.</i>
Cheese	Steady	Available - Strong	<i>Milk volumes are in balance with cheesemaking capabilities in the West, and plant managers in the region say they are operating steady production schedules. In the Northeast, heightened demand for milk from Class I processors is pulling on supplies which previously made their way to regional cheesemakers. Contacts say labor issues persist in the Northeast but note strong cheddar cheese production. Milk volumes are somewhat snug in the Midwest, and contacts continue to report spot milk prices above Class III. Cheese production varies in the region, as some processors have scheduled downtime but others are operating full schedules. Cheese demand is somewhat steady in the Midwest. Contacts in the Northeast and West report steady demand from retail and food service cheese purchasers. Bullish market tones for cheese, seen in recent weeks, are waning somewhat. Source: USDA AMS as of September 15.</i>
Fluid Dairy	Class I - Increasing Class II - Increasing	Class I Available - Steady Class II Short - Strong	<i>September, modest increase in place on Milk (Class I) and on Cultured/Creams (Class II).</i>

CATEGORY	NEAR-TERM MARKET PRICING TREND	SUPPLY vs. DEMAND	DSR MARKET INSIGHTS COMMENTARY
Oils & Shortening	Decreasing	Mixed -Steady	<i>Pricing levels on commodity quality oils have continued trending at the lower levels in recent weeks. No major increases are expected near-term. Premium quality shortenings and oils have see a few recent increases, but have mostly held steady in recent weeks. These products will likely remain at current price levels near term. The supply levels of Canola oils may begin to tighten in some markets as we wait for the new crop to be harvested. Tighter inventory has not had any major impact on pricing so far.</i>
Pork (Commodity)	Decreasing	Available - Decreasing	<i>Between Labor Day and the end of the year tends to be pretty quite for most pork commodities. The prices for the butt, spare rib, and loin should slowly decline throughout September with light demand and ample supply.</i>
Pork (Value-Added)	Decreasing	Available – Decreasing	<i>With decreasing raw material costs on the decline, most value-added products should follow suit. The price for bacon, Sausage, franks, pizza toppings should decline throughout September, however hams should begin to climb with demand for raw material in preparation for Thanksgiving and Christmas ham production driving prices upward.</i>
Poultry (Chicken)	Increasing	Mixed – Steady	<i>Boneless breast meat prices continued to increase this week. All wing sizes are continuing to increase with limited availability on jumbo wings. Tenderloins have also increased this week. Whole chickens remained steady while WOGs show little availability. The back half of the bird also remains steady. There is an expectation as we move forward we will continue to see market appreciation near term.</i>
Poultry (Turkey)	Steady	Available – Steady	<i>Fresh Breast meat prices have slightly declined and are at the 52-week low. Whole bird availability is showing in the marketplace across all sizes. The turkey market is recovering from the HPAI effects that occurred in 2022, as long as it stays the course, availability should continue to rebound in 2023.</i>

CATEGORY	NEAR-TERM MARKET PRICING TREND	SUPPLY vs. DEMAND	DSR MARKET INSIGHTS COMMENTARY
Produce	<p>Lower: Apples, Avocados 60 &amp; smaller, Onions &amp; Russet Potatoes</p> <p>Stable: Strawberries, Broccoli &amp; Tomatoes</p> <p>Increasing: Avocados 48 &amp; larger, Grapes, Lemons, Iceberg, Romaine, Oranges</p>	<p>Improving - Apples, Tomatoes, Broccoli, Iceberg</p> <p>Good - Strong: Russet Potatoes, Romaine, Onions</p> <p>Short - Strong: Strawberries, Oranges, Grapes, Avocados &amp; Lemons</p>	<p><u>Apples</u>: 2023 Harvest underway on Honey crisp, Galas &amp; Ginger Golds. Next week harvest starts on Fuji, Red Dels &amp; Granny Smith.</p> <p><u>Avocados</u>: MX &amp; CA supply of 60ct &amp; larger very tight.</p> <p><u>Broccoli</u>: supplies steady. Quality fair to good.</p> <p><u>Iceberg</u>: steady supply. Good quality &amp; weight.</p> <p><u>Romaine</u>: heavy supplies, esp. on Hearts. Good quality and weight.</p> <p><u>Grapes</u>: Hilary rains damaged 25 Million cases. Quality average.</p> <p><u>Tomatoes</u>: rounds steady, cherries &amp; grapes tight and higher.</p> <p><u>Strawberries</u>: smaller, irregular berries lowering production &amp; supply.</p> <p><u>Oranges</u>: Valencia (seeds). Regreening of rind. Smaller 138ct short.</p> <p><u>Lemons</u>: CA supply tight on all sizes. Quality average.</p> <p><u>Onions</u>: Northwest harvest has resumed. Supplies ample.</p> <p><u>Russet Potatoes</u>: 2023 Plentiful Harvest, high quality with few #2s.</p>
Sugar	Increasing	Short - Strong	<p>Sugar prices remain at elevated levels as we move into fall season and heavier demand. Pricing will remain at current levels for the near term but may show increases as we move closer to the holidays. As supply for the current crop season becomes depleted, there are some concerns about the upcoming cane harvest yields. Longer term pricing and availability of cane sugar may become problematic in the new year.</p>
Shell Eggs	Decreasing	Available - Steady	<p>Consumer demand for shell eggs continues to decline into the end of the month and is average for this time of year. Wholesale prices for cartoned eggs continue to slowly decline on light to moderate demand, and on moderate supplies and offerings. Trading is slow to moderate. Prices on the loose egg market remain weak to lower on moderate to available offerings, moderate supplies, and light to moderate but improving interest. Trading is slow to moderate. Wholesale breaking stock prices are lower with a weak undertone. Demand is light to moderate for increasingly more available offerings and moderate supplies. Trading is slow to moderate with full to extended schedules. The preliminary survey of retail outlets indicates increasing feature activity with a decline in the average ad price. Source: USDA AMS as of September 20.</p>
Seafood	Swai Steady	Swai Available - Steady	<p>Swai has continued to remain steady and at the 52-week low.</p>

CATEGORY	NEAR-TERM MARKET PRICING TREND	SUPPLY vs. DEMAND	DSR MARKET INSIGHTS COMMENTARY
Wheat (Flour Based Products)	Decreasing	Available – Strong	<i>Pricing levels on bulk flour products have decreased slightly in recent days. It is expected that this trend will continue in the near term as supply is adequate in the US and world supplies are not of serious concern at this time.</i>
Polypropylene Resin	Decreasing	Available - Steady	<i>The week combined with resin factories around the Gulf of Mexico and Texas building inventory to protect against this years hurricane season have effectively left these markets unchanged with unremarkable trading.</i>
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Beef (Commodity)	Steady	Available - Steady	<i>The nation's Retailer's and Club stores are busy loading Q4 holiday Rib meat into storage now for return to the market in late November. Packers have achieved their targeted forward sold positioning through October.</i>
Butter	Steady	Available - Strong	<i>Throughout the country, cream availability picked up following Labor Day weekend. However, in the Central and West regions, contacts say volumes quickly tightened as the week progressed. Some butter makers in the East report being able to operate strong production schedules this week, due to the extra loads of cream available. Others report labor issues and other obstacles have kept them from utilizing additional cream volumes. In the Central region, churning was more active this week, though some anticipate butter making to slow in the coming weeks. Western butter production is mixed, as some butter makers relay steady churning, while others say limited cream availability is preventing them from operating full schedules. Demand for butter from retail and food service customers is steady to strong in the East and West, and strengthening in the Central region.</i>
Cheese	Steady	Available - Strong	<i>In the Northeast, Class I operations are pulling on milk supplies, reducing availability for cheesemakers. Contacts in the Midwest note declining milk availability. Meanwhile in the West, cheesemakers say milk supplies are balanced with strong to steady production schedules. Northeastern cheese production has been hampered by persistent labor issues and pauses in manufacturing over the Labor Day weekend. Midwestern cheese output has declined from the winter/spring months when ample milk volumes enabled cheesemakers to operate busy schedules. Some regional plant managers relay more downtime now, while others are paying higher prices for spot milk to maintain strong cheese output. Cheesemakers in the Midwest, particularly mozzarella and pizza cheesemakers, are growing more concerned with their ability to meet market demands. Restaurant demand for cheese is steady in the Northeast, while retail sales are strong. In the West, contacts report strong to steady retail and food service cheese demand. Source: USDA AMS as of September 8.</i>
Fluid Dairy	Class I - Increasing Class II - Increasing	Class I Available - Steady Class II Short - Strong	<i>September, expect a modest increase on Milk (Class I) and on Cultured/Creams (Class II).</i>

CATEGORY	NEAR-TERM MARKET PRICING TREND	SUPPLY vs. DEMAND	DSR MARKET INSIGHTS COMMENTARY
Oils & Shortening	Decreasing	Mixed -Steady	<i>Pricing on most commodity oil products has eased slightly in recent days. This is due to overall market conditions softening on other like-commodities. Current supply levels are being carefully monitored as we continue to deplete current crop and wait for new crop harvest. Premium Shortening products have seen some recent increases based on longer-term markets. Pricing on premium products will likely remain at current levels near term.</i>
Pork (Commodity)	Decreasing	Available - Decreasing	<i>Between Labor Day and the end of the year tends to be pretty quite for most pork commodities. The prices for the butt, spare rib, and loin should slowly decline throughout September with light demand and ample supply.</i>
Pork (Value-Added)	Decreasing	Available – Decreasing	<i>With decreasing raw material costs on the decline, most value-added products should follow suit. The price for bacon, Sausage, franks, pizza toppings should decline throughout September, however hams should begin to climb with demand for raw material in preparation for Thanksgiving and Christmas ham production driving prices upward.</i>
Poultry (Chicken)	Increasing	Mixed – Steady	<i>Boneless breast meat prices continued to increase this week. All wing sizes are continuing to increase with limited availability on jumbo wings. Tenderloins have also increased this week. Whole chickens remained steady while WOGs show little availability. The back half of the bird also remains steady. There is an expectation as we move forward we will continue to see market appreciation near term.</i>
Poultry (Turkey)	Steady	Available – Steady	<i>Fresh Breast meat prices have slightly declined and are at the 52-week low. Whole bird availability is showing in the marketplace across all sizes. The turkey market is recovering from the HPAI effects that occurred in 2022, as long as it stays the course, availability should continue to rebound in 2023.</i>

CATEGORY	NEAR-TERM MARKET PRICING TREND	SUPPLY vs. DEMAND	DSR MARKET INSIGHTS COMMENTARY
Produce	<p>Lower: Avocados 72 &amp; smaller, Romaine, Strawberries &amp; Russet Potatoes</p> <p>Stable: Onions, Apples, Iceberg &amp; Broccoli</p> <p>Increasing: Avocados 60 &amp; larger, Grapes, Strawberries, Lemons, Oranges, Tomatoes</p>	<p>Improving - Tomatoes, Broccoli, Iceberg</p> <p>Good - Strong: Apples, Russet Potatoes, Romaine &amp; Onions</p> <p>Short - Strong: Strawberries, Oranges, Grapes, Avocados, &amp; Lemons</p>	<p><u>Apples</u>: 2023 Harvest underway on Honey crisp, Galas &amp; Ginger Golds. Next week harvest starts on Fuji, Red Dels &amp; Granny Smith.</p> <p><u>Avocados</u>: MX &amp; CA supply of 60ct &amp; larger very tight.</p> <p><u>Broccoli</u>: supplies steady. Quality fair to good.</p> <p><u>Iceberg</u>: steady supply. Good quality &amp; weight.</p> <p><u>Romaine</u>: heavy supplies, esp. on Hearts. Good quality and weight.</p> <p><u>Grapes</u>: Hilary rains damaged 25 Million cases. Quality average.</p> <p><u>Tomatoes</u>: rounds steady, cherries &amp; grapes tight and higher.</p> <p><u>Strawberries</u>: smaller, irregular berries lowering production &amp; supply.</p> <p><u>Oranges</u>: Valencia (seeds). Regreening of rind. Smaller 138ct short.</p> <p><u>Lemons</u>: CA supply tight on all sizes. Quality average.</p> <p><u>Onions</u>: Northwest harvest has resumed. Supplies ample.</p> <p><u>Russet Potatoes</u>: 2023 Plentiful Harvest, high quality with few #2s.</p>
Sugar	Increasing	Short - Strong	<p>Sugar prices remain at elevated levels as we move into fall season and heavier demand. Pricing will remain at current levels for the near term.</p> <p>Supply from the current crop will continue to decline and may cause some regional shortages as we move closer to fall harvest season.</p>
Shell Eggs	Stable	Available - Steady	<p>Consumer demand for shell eggs continues to decline from its pre-school start levels a few weeks ago. Wholesale prices for cartoned eggs are moving lower on light to moderate demand for moderate offerings.</p> <p>Supplies are light to moderate and trading is moderate. Prices on the loose egg market are weak to lower on moderate to available offerings, moderate supplies, and light to moderate interest. Trading is slow to moderate. Wholesale breaking stock prices are unchanged with a mixed undertone. Demand is light to moderate for light offerings and light to moderate supplies. Trading is slow to moderate and schedules are full to reduced. The preliminary survey of retail outlets indicates a sharp drop in activity for conventional caged eggs with a sharp increase in the average ad price on the very limited test. Source: USDA AMS as of September 13.</p>
Seafood	Swai Steady	Swai Available - Steady	Swai has continued to remain steady and at the 52-week low.

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Wheat (Flour Based Products)	Decreasing	Available – Strong	<i>Domestic supply levels remain adequate, but not overly abundant. As the spring wheat crop is currently under harvest, yields appear to be adequate at this point. Domestic pricing has seen some softening based on overall solid world supply at this time. The conflict in the Black Sea area is still being closely monitored by analysts as it may impact pricing in the coming weeks.</i>
Polypropylene Resin	Decreasing	Available - Steady	<i>The week combined with resin factories around the Gulf of Mexico and Texas building inventory to protect against this years hurricane season have effectively left these markets unchanged with unremarkable trading.</i>
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Beef (Commodity)	Steady	Available - Steady	<i>The near-term Beef pipeline for the upcoming Labor Day weekend is fully loaded. Next up, will consumer demand clear pipeline inventories and do so profitably? In other news, the nation's Retailer's and Club stores are busy loading Q4 holiday Rib meat into storage now for return to the market in late November. Packers have achieved their targeted forward sold positioning through October.</i>
Butter	Steady	Available - Steady	<i>Western butter makers report light cream availability, though some anticipated the Labor Day holiday contributed to less tightness. In the East, some cream volumes are being redirected from southern states, contributing to increased availability in parts of the region and lower cream multiples. Contacts in the Central region report greater volumes of cream are being spun off from bottling activity. Furthermore, regional butter makers say downtime at some plants for Labor Day is contributed to increased cream availability. Butter production has picked up some in the Central region recently. In front of the Labor Day holiday weekend, some butter makers in the East reported lighter schedules due to planned downtime. In the West, butter production is mixed. Demand for butter is strong to steady in all three regions, though contacts in the West note somewhat light export butter demand. Source: USDA AMS as of September 1.</i>
Cheese	Steady	Available - Steady	<i>Weather is having a negative impact on milk availability in the Upper Midwest, and contacts say this has contributed to limited milk volumes offered to cheesemakers. In the Northeast, some milk volumes are being diverted towards bottling rather than cheese production. Milk output continues to soften in the West, though regional cheesemakers say production is steady. Cheesemakers in the Northeast cited persistent labor issues and scheduled downtime ahead of the Labor Day holiday weekend. Plant managers report strong cheddar, Colby Jack, and mozzarella cheese production, outside of holiday down time. In the Northeast and Midwest, demand for cheese is strong. Meanwhile in the West, retail and food service demands are reported as strong to steady, while export demand is moderate. Cheese inventories are sufficient in the West to fulfill current spot demand and to meet contractual obligations. Some Midwest contacts are growing concerned that an increase in demand for mozzarella and pizza cheese will limit their ability to fulfill orders in the coming weeks. Source: USDA AMS as of September 1.</i>

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Fluid Dairy	Class I - Increasing Class II - Increasing	Class I Available - Steady Class II Short - Strong	<i>September, expect a modest increase on Milk (Class I) and on Cultured/Creams (Class II).</i>
Oils & Shortening	Stable	Mixed -Steady	<i>Commodity oil products have shown a slight decline on pricing in recent days due to good weather conditions and promising crop yields. This will continue to drive markets and will be watched closely as growth season finalizes and harvest begins. There will likely be no great changes in pricing levels in the coming days. Premium shortening products normally follow longer-term pricing trends. These products have shown some moderate price increases on some items and will remain at such levels as we move into fall.</i>
Pork (Commodity)	Decreasing	Available - Decreasing	<i>The demand for all commodities – butt, picnic, boneless loin are all on the decline as demand wanes. Expect mild increasing price for spare ribs just before Labor Day, after which it'll join the other commodities in decline.</i>
Pork (Value-Added)	Decreasing	Available – Decreasing	<i>The belly price peaked two weeks ago and is now decreasing in value as fast as it increased. Expect bacon prices to decline starting mid-August through Labor Day. Demand for pork trim is decreasing so expect the prices of sausage, pork-based franks and pizza toppings to begin to decline as well.</i>
Poultry (Chicken)	Increasing	Mixed – Steady	<i>Boneless breast meat prices continued to increase this week. All wing sizes are continuing to increase with limited availability on jumbo wings. Tenderloins have also increased this week. Whole chickens remained steady while WOGs show little availability. The back half of the bird also remains steady. There is an expectation as we move forward we will continue to see market appreciation near term.</i>
Poultry (Turkey)	Steady	Available – Steady	<i>Fresh Breast meat prices have slightly declined and are at the 52-week low. Whole bird availability is showing in the marketplace across all sizes. The turkey market is recovering from the HPAI effects that occurred in 2022, as long as it stays the course, availability should continue to rebound in 2023.</i>

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Produce	<p>Lower: Avocados 72 &amp; smaller, Romaine, Strawberries &amp; Russet Potatoes</p> <p>Stable: Grapes, Apples, Iceberg &amp; Broccoli</p> <p>Increasing: Avocados 60 &amp; larger, Onions, Lemons, Oranges, Tomatoes</p>	<p>Improving - Avocados 60 &amp; larger, Onions, Lemons, Oranges, Tomatoes</p> <p>Good - Strong: Oranges</p> <p>Short - Strong: Avocados 60 &amp; larger, Onions, Lemons, Oranges, Tomatoes</p>	<p><i>Apples, 2023 Harvest underway on Honey crisp, Galas &amp; Ginger Golds. Fuji, Red Dels &amp; Granny Smith harvest starts later in Sept. Avocados, MX &amp; CA supply of 60ct &amp; larger very tight. Broccoli supplies steady. Quality fair to good. Iceberg, steady supply, low demand. Good quality &amp; weight. Romaine, heavy supplies, esp. on Hearts. Good quality and weight. Grapes, rains have damaged 30% of crop. Good quality. Tomatoes, rounds steady, cherries &amp; grapes tight and higher. Strawberries, abundance of fruit now. Will tighten up later in Sept. Oranges, Valencia (seeds). Peaking on 72/88ct. Smaller 138ct short. Lemons, spring rains produced larger fruit. Small 140-200ct very ltd. Onions, Northwest rain delaying harvest. Supply short. Russet Potatoes, 2023 Plentiful Harvest, high quality with few #2s.</i></p>
Sugar	Increasing	Short - Strong	<p><i>Sugar prices remain at elevated levels as we move into fall season and heavier demand. Pricing will remain at current levels for the near term. Supply from the current crop will continue to decline and may cause some regional shortages as we move closer to fall harvest season.</i></p>
Shell Eggs	Stable	Available - Steady	<p><i>Consumer demand for shell eggs is about unchanged over the past week as the focus was on outdoor activities for the for the Labor Day weekend. Wholesale prices for cartoned eggs are mostly steady with light to moderate supplies and offerings and moderate to good interest. Prices on the loose egg market are weak on light to moderate supplies and offerings and mixed demand. Trading is slow to moderate. Wholesale breaking stock prices are steady with light to moderate demand, light offerings, and light to moderate supplies. Schedules vary and trading is slow to moderate. The preliminary survey of retail outlets indicates an increasing pace of featuring with a slight increase in the average ad price. Source: USDA AMS as of September 6.</i></p>
Seafood	Swai Steady	Swai Available - Steady	<p><i>Swai has continued to remain steady and at the 52-week low.</i></p>

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Wheat (Flour Based Products)	Steady	Available – Steady	<i>Bulk Flour prices have softened slightly in recent days due to a better weather outlook as we move into fall. World wheat availability is looking more positive than in recent months and is also impacting pricing to the benefit of distributors. Though prices are still trending higher than preferred, the short-term slight decline will be welcomed. Strong demand for flour as we move into fall baking season could send prices higher if demand starts outpacing current domestic supply levels.</i>
Polypropylene Resin	Decreasing	Available - Steady	<i>The holiday week combined with resin factories around the Gulf of Mexico and Texas building inventory to protect against this years hurricane season have effectively left these markets unchanged with unremarkable trading.</i>
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