

CATEGORY	NEAR-TERM MARKET PRICING TREND	SUPPLY vs. DEMAND	DSR MARKET INSIGHTS COMMENTARY
Beef (Commodity)	Increasing	Available - Mixed	<i>The national foodservice market tone is steady. Business is generally good. Retail is showing greater interest in beef with warmer weather. The market appreciation we have been waiting for should be just ahead. Expect higher prices on middle meats driven by seasonal demand.</i>
Butter	Increasing	Available - Strong	<p><i>Domestic butter demand continues to vary from steady to strong across the country for both the retail and food service sectors as we approached the Memorial holiday weekend last week. Industry participants note cream volumes are comfortable and generally available. That said, some stakeholders anticipate cream to begin seasonally tightening by mid-June. Butter production is mixed with some plant managers conveying scheduled downtime in connection with the Memorial holiday weekend. Stakeholders indicate unsalted bulk butter is tight for spot load buyers.</i></p> <p><i>East Region Cream demand is steady in the East. Some plant managers have shared scheduled downtime due to the Memorial holiday weekend. Due to scheduled plant downtime, cream is more readily available in some pockets of the region over last week. Some butter processors are taking advantage of acquiring available spot loads and ahead of anticipated cream tightness in the near term. Contacts relay frozen bulk butter inventories of both salted and unsalted varieties are robust. Butter demand is steady to stronger. Retail demand is stronger than in recent weeks. Foodservice demand is steady.</i></p> <p><i>Central Region Cream availability is somewhat steady with recent weeks. Contacts, namely cream handlers, expect multiples to fall nearer to flat market closer to the Memorial holiday weekend. Regardless, there are expectations that cream could begin its seasonal tightening by early- to mid-June. Currently, churning is active, but if those expectations materialize shifts in production are likely. Butter production schedules are steady to stronger throughout the U.S.</i></p>
Cheese	Steady	Available - Steady	<p><i>In the East, cheese production schedules have held steady despite flattening milk production at the farm level. Contacts relay high domestic cheese prices have hindered export demand. Cheesemakers in the Central region say milk availability is in line with recent weeks. Cheese demand remains strong. Contacts relay some barrel cheesemakers in the region have also started producing curds and other seasonal cheese varieties. In the West, cheese production remains strong. Milk volumes available to Class III processors are tightening, but contacts anticipate school breaks to free additional milk supplies in the near term.</i></p> <p><i>East Region Farm level milk production has leveled off in the East. Milk volumes are readily available for processing and plant managers share cheese production schedules are seasonally steady. Some cheese plant managers have scheduled time off due to the upcoming holiday weekend. Contacts share domestic cheese demand is steady to stronger. High domestic price points for both blocks and barrels have reportedly hindered export demand. Retail demand is stronger than in recent weeks. Foodservice demand is noted to be steady to weaker.</i></p> <p><i>Central Region Cheesemakers say milk availability is similar to previous weeks. Milk handlers have become used to plant downtime, and the Memorial holiday weekend will provide some plant workers with an extra day (or two) of time off. All said, though, reported spot milk prices at report time have not reached the same lows of last week</i></p>
Fluid Dairy	Class I - Increasing Class II - Increasing	Class I Available - Steady Class II Short - Strong	<i>June Milk (Class I) costs increased significantly. Cultured/Creams (Class II) saw a modest increase..</i>

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Oils/Shortening	Steady	Available - Mixed	Price levels on Commodity Oil seed products have maintained similar levels in recent days with no major changes anticipated in the near term. Planting season is underway in the United States and Canada. Weather has been favorable thus far and planting is proceeding according to plan in most areas. Premium Shortening and Oil products will see some price declines in the coming weeks as they move based on the long-term slow price declines that we have seen over the past few months.
Pork (Commodity)	Mixed	Available - Decreasing	Now that Memorial Day is upon us, expect the butt price to decline slightly through the first week of June. The big market increase is due just before July 4 about 25% higher than now. Spare rib prices should decline week on week until Labor Day. Backrib prices should continue to increase through July 4.
Pork (Value-Added)	Steady	Available – Steady	he market for both pork belly and trim is forecast to appreciate slightly over the next month, but will still remain relatively stable.
Poultry (Chicken)	Steady	Short – Steady	Pricing on most cuts have remained steady this week. Tenderloins have continued to appreciate slightly each day this week. Wings remain in tight supply, but not directly correlated to demand. The back half of the bird remains steady and supply is tight.
Poultry (Turkey)	Steady	Available – Strong	Frozen whole bird pricing remains steady and well below pricing we saw a year ago. Breast meat also remains steady with plentiful availability. Expectation is this will remain the pattern near term.
Produce	Lower - Grapes, Yellow Onions, Tomatoes Steady - Apples, Avocados, Bell Peppers, Broccoli, Oranges, Strawberries, Russet Potatoes Higher - Romaine, Iceberg, Value-Added Lettuces, Lemons, Red Onions	Improving/Steady - Grapes & Tomatoes Good/Steady - Avocados, Apples, Broccoli, Strawberries, Russet Potatoes, Bell Peppers, Yellow Onions Short/Strong - Oranges, Iceberg, Romaine, Lemons, Red Onions	Apples, ample supply except on Gala, Pink, Gold, which are rising. Avocados, MX & CA cost steady. Good quality. Peru fruit is arriving. Bell Peppers, MX, FL & Canada producing, costs steady. Quality good. Broccoli, Salinas has good supplies. Market steady. Nice quality. Iceberg, Salinas low availability due to weather related quality issues. Value-Added/Fresh Cut Lettuce costs are escalated. Romaine, Salinas supply limited due to weather related quality issues. Grapes, Chile cleaning up. New crop MX fruit is shipping. Tomatoes, production picked up. Costs have declined. Avg. quality. Strawberries, harvest heads to peak production. Excellent quality. Oranges, rains sized up CA Val crop. 88/113/138s scarce thru summer. Lemons, rains sized up the CA crop. 165/200/235s scarce thru summer. Onions, Yellow supply ample. Reds very limited and expensive. Russet Potatoes, 40-50ct somewhat limited and higher. 60-120ct plus Idaho #2s, ample supplies, nice quality and dirt cheap. CA Peaches, Plums, Nectarines & Cherries are now available.
Bulk Sugar	Steady	Mixed - Mixed	Sugar pricing has not shown much change in recent days and will likely not offer much of a break in the coming weeks. Supply is available to cover domestic demand in most areas. Some locations may need to buy from alternative sources as we move through Summer, but there will be product to cover all Foodservice demand until fall harvest season.

CATEGORY	NEAR-TERM MARKET PRICING TREND	SUPPLY vs. DEMAND	DSR MARKET INSIGHTS COMMENTARY
Shell Eggs	Increasing	Available - Steady	<p><i>Demand for shell eggs softened last week and is driven by marketers struggling to meet their normal business needs. The volume of Large class eggs in the weekly shell egg inventory is down 18% from a year ago and word of an additional major HPAI outbreak is limiting supply availability and has placed sellers in a strong position. Prices for negotiated trading of loose eggs continue higher on moderate to good demand for light to moderate supplies and limited offerings. Trading is moderate. Wholesale breaking stock prices moved sharply higher on a full range of demand for very limited offerings. Supplies are light to moderate and trading is slow to moderate. The preliminary survey of retail outlets indicates a sharp rise in activity for conventional caged shell eggs with the average ad price about unchanged. Source: USDA AMS as of May 29</i></p> <p><i>Avian Influenza: On 5/29 Michael Foods reported a third-party farm in Iowa expects to depopulate 4.5MM hens based on a Highly Pathogenic Avian Influenza (HPAI) outbreak. This follows a report Eggs America on 5/21 that a farm in Minnesota expects to depopulate 1.2MM-1.3MM birds after an HPAI outbreak was confirmed; Michael Foods noted on 5/29 that this same Minnesota farm is a 3rd party supplier of theirs. Michael Foods' 3rd party suppliers support their primary company-owned supply. These reports are in addition to three other recent reports of HPAI in Michigan (4/2 and 4/9) and in Texas (4/2). Though these are the same type of outbreaks that led to widespread flock depopulations in 2022 and subsequent increases in market prices for eggs in 2022 and early 2023, the current scale is not yet to scale of the</i></p>

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Wheat (Flour Based Products)	Steady	Available - Weak	<i>Wheat Market prices have seen little change in recent days. We may see some slight declines in commodity flour products over the next couple of weeks, but nothing substantial. Though demand has increased slightly in recent weeks, there is still ample domestic supply to cover foodservice. Weather is still relatively favorable for the spring planting season. Thus there has been no real weather impact on Wheat so far this month.</i>
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Butter	Increasing	Available - Steady	<p><i>Retail butter demand ranges from steady to strong across the country. Food service demand is steady and meeting expectations. Although some industry participants say cream availability is tightening somewhat, cream is generally available throughout the country. Like domestic demand, butter production varies from steady to strong nationally. A few butter manufacturers note working to build stock prior to planned downtime in June. Unsalted bulk butter remains tighter than other butter types.</i></p> <p><i>East Region Cream demand remains steady in the East. Contacts are beginning to share that cream availability is tightening somewhat. Despite notes of cream tightness, butter plant managers continue to relay steady production schedules. Frozen bulk butter inventories are robust. Contacts share steady to stronger demand for butter as Memorial Day approaches. Retail demand is steady to stronger than in recent weeks. Foodservice demand is steady.</i></p> <p><i>Central Region Butter makers in the region report a similar market environment to previous weeks. Customers' interests have picked up due to both seasonal trends and as a push to get ahead of continued bullish market prices. Food service demand is not noted as robust, but it is meeting expectations. Retail orders, though, are ahead of previous years' numbers according to some contacts. Cream remains widely available, particularly in the southern area of the region. That said, cream handlers relay that Class III interests have begun to pull from the overall cream supply in the region. Still, butter makers do not expect</i></p>
Cheese	Increasing	Available - Steady	<p><i>Retail butter demand ranges from steady to strong across the country. Food service demand is steady and meeting expectations. Although some industry participants say cream availability is tightening somewhat, cream is generally available throughout the country. Like domestic demand, butter production varies from steady to strong nationally. A few butter manufacturers note working to build stock prior to planned downtime in June. Unsalted bulk butter remains tighter than other butter types.</i></p> <p><i>East Region Cream demand remains steady in the East. Contacts are beginning to share that cream availability is tightening somewhat. Despite notes of cream tightness, butter plant managers continue to relay steady production schedules. Frozen bulk butter inventories are robust. Contacts share steady to stronger demand for butter as Memorial Day approaches. Retail demand is steady to stronger than in recent weeks. Foodservice demand is steady.</i></p> <p><i>Central Region Butter makers in the region report a similar market environment to previous weeks. Customers' interests have picked up due to both seasonal trends and as a push to get ahead of continued bullish market prices. Food service demand is not noted as robust, but it is meeting expectations. Retail orders, though, are ahead of previous years' numbers according to some contacts. Cream remains widely available, particularly in the southern area of the region. That said, cream handlers relay that Class III interests have begun to pull from the overall cream supply in the region. Still, butter makers do not expect</i></p>
Fluid Dairy	Class I - Decreasing Class II - Increasing	Class I Available - Steady Class II Short - Strong	<i>May changes are in place, with a decrease on Milk (Class I) and an increase on Cultured/Creams (Class II).</i>

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Oils/Shortening	Steady	Available - Mixed	Price levels on Commodity Oil seed products have maintained similar levels in recent days with no major changes anticipated in the near term. Planting season is underway in the United States and Canada. Weather has been favorable thus far and planting is proceeding according to plan in most areas. Premium Shortening and Oil products will see some price declines in the coming weeks as they move based on the long-term slow price declines that we have seen over the past few months.
Pork (Commodity)	Mixed	Available - Decreasing	Now that Memorial Day is upon us, expect the butt price to decline slightly through the first week of June. The big market increase is due just before July 4 about 25% higher than now. Spare rib prices should decline week on week until Labor Day. Backrib prices should continue to increase through July 4.
Pork (Value-Added)	Steady	Available – Steady	The belly value is relatively flat for the next month or so, expect bacon pricing to remain stable.
Poultry (Chicken)	Steady	Short – Steady	Pricing on most cuts have remained steady this week. Tenderloins have continued to appreciate slightly each day this week. Wings remain in tight supply, but not directly correlated to demand. The back half of the bird remains steady and supply is tight.
Poultry (Turkey)	Steady	Available – Strong	Frozen whole bird pricing remains steady and well below pricing we saw a year ago. Breast meat also remains steady with plentiful availability. Expectation is this will remain the pattern near term.
Produce	Lower - Avocados, Bell Peppers, Grapes, Strawberries & Yellow Onions Steady - Apples, Broccoli, Value-Added Lettuces, Russet Potatoes & Tomatoes Higher - Oranges, Romaine, Iceberg, Lemons & Red Onions	Improving/Steady - Grapes Good/Steady - Avocados, Apples, Broccoli, Strawberries, Russet Potatoes, Value-Added Lettuces, Bell Peppers & yellow Onions Short/Strong - Oranges, Iceberg, Romaine, Tomatoes, Lemons & Red Onions	Apples, ample supply except on Gala & Gold, market higher on them. Avocados, MX & CA cost easing. Peru fruit due late May. Good quality. Bell Peppers, MX, FL & Canada producing, costs lower. Quality good. Broccoli, Salinas has good supplies. Market steady. Nice quality. Iceberg, Salinas low availability due to weather related quality issues. Value-Added/Fresh Cut Lettuce costs are escalated. Romaine, Salinas supply limited due to weather related quality issues. Grapes, imports winding down. Good quality. MX starts in late May. Tomatoes, production picked up. Costs elevated & easing. Avg. quality. Strawberries, harvest heads to peak production. Excellent quality. Oranges, rains sized up CA Val crop. 88/113/138s scarce thru summer. Lemons, rains sized up the CA crop. 165/200/235s scarce thru summer. Onions, new crop Yellow good supply, cost lower. Reds tight & higher. Russet Potatoes, 40-50ct somewhat limited and higher. 60-120ct plus Idaho #2s, ample supplies, nice quality and dirt cheap. CA Peaches, Plums, Nectarines & Cherries are now available.
Bulk Sugar	Steady	Mixed - Mixed	Sugar pricing has not shown much change in recent days and will likely not offer much of a break in the coming weeks. Supply is available to cover domestic demand in most areas. Some locations may need to buy from alternative sources as we move through Summer, but there will be product to cover all Foodservice demand until fall harvest season.

CATEGORY	NEAR-TERM MARKET PRICING TREND	SUPPLY vs. DEMAND	DSR MARKET INSIGHTS COMMENTARY
Shell Eggs	Increasing	Available - Steady	<p><i>Demand for shell eggs rises above average as marketers are struggling to meet their normal business needs. The volume of Large class eggs in the weekly shell egg inventory is down 14% from a year ago and word of an additional HPAI outbreak has placed sellers in a strong position. Prices for negotiated trading of loose eggs are sharply higher on moderate to good demand for light to moderate supplies and offerings. Trading is moderate. Wholesale breaking stock prices are unchanged with light to moderate demand for limited offerings. Supplies are light to moderate and trading is slow to moderate. The preliminary survey of retail outlets indicates no measurable activity for conventional caged shell eggs at this point in the cycle with no average ad price available as retailers are looking to manage their shell egg supply. Source: USDA AMS as of May 22</i></p> <p><i>Avian Influenza: On 5/21 Eggs America reported a farm in Minnesota expects to depopulate 1.3MM birds as a Highly Pathogenic Avian Influenza (HPAI) outbreak was confirmed. This is in addition to three other recent reports of HPAI in Michigan (4/2 and 4/9) and in Texas (4/2). Though these are the same type of outbreaks that led to widespread flock depopulations in 2022 and subsequent increases in market prices for eggs in 2022 and early 2023, the current scale of these late-2023 outbreaks is much smaller than that which were experienced last year. Urner Barry reports steady spot market pricing despite news of these outbreaks, however pricing is a lagging indicator of supply that will likely be affected by a lower population of hens laying eggs in the future. It is important to remain vigilant regarding local market</i></p>

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Wheat (Flour Based Products)	Steady	Available - Weak	<i>Wheat Market prices have seen little change in recent days. We may see some slight declines in commodity flour products over the next couple of weeks, but nothing substantial. Though demand has increased slightly in recent weeks, there is still ample domestic supply to cover foodservice. Weather is still relatively favorable for the spring planting season. Thus there has been no real weather impact on Wheat so far this month.</i>
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Beef (Commodity)	Steady	Available - Mixed	<i>Demand projections for Beef in front of Mother's Day and Memorial weekend have been dialed back. We expect no volume bump, and little to no price appreciation through the remainder of the month. However, we will see last minute price rallies. Caution, price value will be artificial and short lived.</i>
Butter	Increasing	Available - Steady	<p><i>Retail butter demand varies from steady to stronger. However, food service demands have less convergence across the nation. In the East, food service demand remains light. In the Midwest, food service demand pushes are noted. In the West, stakeholders say annual mid-May celebrations are contributing to stronger food service demand. Industry participants note cream volumes as comfortable and readily available for butter manufacturers. Butter production schedules are steady. Some butter manufacturers report tight availability of unsalted bulk butter loads for spot buyers.</i></p> <p><i>East Region Cream demand is steady in the East region. Butter plant managers continue to share seasonally steady churning schedules. Monday's Dairy Products report revealed March 2024 U.S. butter production was 209 million pounds, 5.5% above February 2024 and 1.4% above March 2023. Contacts share demand for butter is stable. Retail demand is steady to stronger than previous weeks. Demand from the foodservice sector remains light.</i></p> <p><i>Central Region Butter makers say May cream availability is holding in line with April, as it remains generally available for churning schedules. Despite milk showing signs of tightness, milkfat availability has yet to fall in line. Butter makers are attributing some of the extra cream to output-per-cow improvements at the farm level. On the demand side, foodservice and retail pushes are being relayed. Prices of roughly \$3/lb. may be higher than typical this time of the year, but expectations are they will only continue to push. Clearly, butter markets are and have cheesemakers relay steady to stronger production schedules throughout the U.S. Monday's Dairy Products report revealed total U.S. cheese production in March 2024 was 1.23 billion pounds, 7.6% above February 2024 and 0.1% above March 2023. In the Northeast, contacts share milk production remains strong and cheese plant managers report seasonally steady production schedules. Some contacts have shared they are not seeing as sharp of an increase in demand as current CME pricing could imply. In the Central region, contacts share demand has been stronger from both local and Eastern customers. Contacts indicate spot milk availability is beginning to tighten. Cheese inventories are noted to be comfortable at the moment, but cheesemakers are being cautious so as to not oversell inventory. In the West, cheese manufacturers are anticipating tightening milk volumes, but production schedules are robust for the time being. Cheese stocks are available to accommodate both contractual obligations and spot interests.</i></p> <p><i>East Region Farm level milk production remains strong in the East. Cheese plant managers relay steady production schedules. Total U.S. cheese production in March 2024 was 1.23 billion pounds, 7.6% above February 2024 and 0.1% above March 2023. Some contacts share they are not seeing the sharp increases in demand as the price increases may imply. Retail demand is steady. Foodservice demand is noted to be light.</i></p> <p><i>Central Region Cheese market tones continued to rally this week. For a number of weeks now, cheesemaker contacts in the region have been suggesting strengthened demand from both local and Eastern</i></p>
Cheese	Increasing	Available - Steady	<p><i>While limited inventories may still be present of larger whole sizes, inventory of 6/10 Small or Tiny Whole Potatoes and Whole Beets are exhausted until new pack in late August.</i></p>
Canned Vegetables - Whole Potatoes & Whole Beets	Increasing	Short - Strong	
Fluid Dairy	Class I - Decreasing Class II - Increasing	Class I Available - Steady Class II Short - Strong	<i>May changes are in place, with a decrease on Milk (Class I) and an increase on Cultured/Creams (Class II).</i>

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Pork (Commodity)	Increasing	Available - Strong	Prices for butts, Spare Ribs, and St. Louis Spare Ribs are on the rise through Memorial Day, while backrib prices are on the gentle rise for through June.
Pork (Value-Added)	Steady	Available – Steady	The belly value is relatively flat for the next month or so, expect bacon pricing to remain stable.
Poultry (Chicken)	Steady	Short – Steady	Pricing on most cuts have remained steady this week. Tenderloins have continued to appreciate slightly each day this week. Wings remain in tight supply, but not directly correlated to demand. The back half of the bird remains steady and supply is tight.
Poultry (Turkey)	Steady	Available – Strong	Frozen whole bird pricing remains steady and well below pricing we saw a year ago. Breast meat also remains steady with plentiful availability. Expectation is this will remain the pattern near term.
Produce	Lower - Avocados, Bell Peppers, Strawberries, Yellow Onions & Tomatoes Steady - Apples, Broccoli, Iceberg, Value-Added Lettuces, Grapes & Russet Potatoes Higher - Oranges, Romaine, Lemons & Red Onions	Improving/Steady - Strawberries, Grapes, Broccoli, Bell Peppers & Yellow Onions Good/Steady - Avocados, Apples, Russet Potatoes & Value-Added Lettuces Short/Strong - Oranges, Iceberg, Romaine, Tomatoes, Lemons, Grapes & Red Onions	Apples, Gala, Gold & Pinks supply low, market up on those varieties. Avocados, MX & CA cost easing. Peru fruit due late May. Good quality. Bell Peppers, MX, FL & Canada producing, costs lower. Quality good. Broccoli, Salinas has good supplies. Market steady. Nice quality. Iceberg, Salinas low availability due to weather related quality issues. Value-Added/Fresh Cut Lettuce costs are escalated. Romaine, Salinas supply limited due to weather related quality issues. Grapes, imports winding down. Good quality. MX starts in late May. Tomatoes, production picked up. Costs elevated & easing. Avg. quality. Strawberries, ample supplies of nice, sound berries. Oranges, rains sized up CA Val crop. 88/113/138s scarce thru summer. Lemons, rains sized up the CA crop. 165/200/235s scarce thru summer. Onions, new crop Yellow good supply, cost lower. Reds tight & higher. Russet Potatoes, 40-60ct somewhat limited and higher. 70-120ct plus #2s, ample supplies, nice quality and dirt cheap.
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Shell Eggs	Steady	Available - Steady	<p><i>Demand for shell eggs improved over the past week, changing the fortunes of the wholesale loose egg spot market which reversed a 4-week downward trend is moving higher. Much of the improved demand came from marketers looking to maintain an adequate supply on hand for regular needs. Retail demand remains light to moderate for increased spot market offerings but the pace of trading remains slow to moderate. Wholesale breaking stock prices halted their downward slide and are holding steady as offerings are slightly less available than in the past week and supplies are at a comfortable moderate level. Trading is slow and schedules are running full to slightly reduced. The preliminary survey of retail outlets indicates a slight decrease in activity for conventional caged shell eggs this ad cycle with a sharp drop in the average ad price. Source: USDA AMS as of May 15</i></p> <p><i>Avian Influenza: at the beginning of April there were three reports of Highly Pathogenic Avian Influenza (HPAI) in Michigan (4/2 and 4/9) and in Texas (4/2). Though these are the same type of outbreaks that led to widespread flock depopulations in 2022 and subsequent increases in market prices for eggs in 2022 and early 2023, the current scale of these late-2023 outbreaks is much smaller than that which were experienced last year. Urner Barry reports steady spot market pricing despite news of these outbreaks, however it is important to remain vigilant regarding local market conditions that may affect supply and spot pricing.</i></p>

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Wheat (Flour Based Products)	Steady	Available - Weak	<i>Wheat Market prices have seen little change in recent days. We may see some slight declines in commodity flour products over the next couple of weeks, but nothing substantial. Though demand has increased slightly in recent weeks, there is still ample domestic supply to cover foodservice. Weather is still relatively favorable for the spring planting season. Thus there has been no real weather impact on Wheat so far this month.</i>
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