




























SALES MARKET INSIGHTS - Week of December 22, 2025

CATEGORY	NEAR-TERM MARKET PRICING TREND	SUPPLY vs. DEMAND	MARKET INSIGHTS COMMENTARY
 Beef (Commodity)	Decreasing 	Available - Mixed	<i>Sell! Fight for local and regional market share. Help clear, and sell through on-hand warehouse inventory. The holiday selling window for Ribs and Tenderloins will remain open for 10 to 14 days. Anticipate the return of unwelcome market volatility immediately following the New Year. Chucks, Rounds, Thin Meats, and Ground Beef will move higher.</i>
 Pork (Commodity)	Decreasing 	Available - Weak	<i>Focus this time of year is on beef, turkey, and value-added pork (ham). Demand is weak and supply is sufficient, prices across all commodities are unremarkable.</i>
 Pork (Value-Added)	Decreasing 	Available - Steady	<i>Bacon pricing should be at or near the bottom and should settle for the rest of 2026. Long term, expect prices to increase 25% between January 1 and March 1.</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 	Increasing Supply, Strong Demand	<i>U.S. butter production remains strong across all regions with ample cream supplies, although manufacturers report mixed cream demand. Domestic retail sales are robust, but food service butter demand is flat to tepid, with only steady to light activity reported in the East and Central regions. Many producers are prioritizing export and international orders, especially for higher butterfat products, which is tightening supplies of certain types of bulk butter. In the East, strong retail sales are prompting some churns to focus on retail packaging over food service channels. Overall, domestic demand is solid heading into year-end, though food service activity remains subdued relative to retail and export markets. Source: USDA AMS as of December 12</i>
 Cheese	Decreasing 	Increasing Supply, Moderating Demand	<i>U.S. butter production remains strong across all regions with ample cream supplies, although manufacturers report mixed cream demand. Domestic retail sales are robust, but food service butter demand is flat to tepid, with only steady to light activity reported in the East and Central regions. Many producers are prioritizing export and international orders, especially for higher butterfat products, which is tightening supplies of certain types of bulk butter. In the East, strong retail sales are prompting some churns to focus on retail packaging over food service channels. Overall, domestic demand is solid heading into year-end, though food service activity remains subdued relative to retail and export markets. Source: USDA AMS as of December 12</i>
 Fluid Dairy	Class I - Increasing  Class II - Decreasing 	Class I - Available - Steady Class II - Available - Steady	<i>Class I: Milk costs are set to take a significant jump in December. Class II: Creams & Cultured costs will decrease slightly in December.</i>
 Oils/Shortening/Margarine	Mixed 	Available - Steady	<p><i>Prices on most Commodity Oils (Soybean, Canola, Peanut, etc.) on the street have remained pretty steady in recent days. Prices had jumped significantly earlier this year due to an expected EPA announcement regarding the use of oilseed products for biofuels. However, the final ruling on the biofuel requirements has been pushed down the road. World supply of soybeans and canola has been abundant based on recent harvest and planting results. Thus, the stock market prices have softened somewhat in recent days on oilseed products. As we close out the year and move into the new year, we will likely see steady to slightly lower prices on most oilseed products in the Foodservice arena.</i></p> <p><i>The pricing on Palm Oil Based Products (Margarine, Cube Shortening, etc.) may show some decreases in certain markets based on ample world supply. This may not be standard across all regions based on regional production limitations versus very heavy demand. Overall, we do not expect to see any major changes through year-end.</i></p> <p><i>Tallow is still the outlier with it comes to price. Prices are historically high based on extreme demand. Availability continues to tighten as the US does not grow enough cattle to allow us to render the tallow that recent trends are dictating. It is suggested that we use discretion in trying to build new operator business with tallow products. Cube Tallow is in better supply than liquid, but is still very limited.</i></p>



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 Produce	<p>Lower - Avocados, Lemons</p> <p>Steady - Apples, Avocados, Iceberg, Romaine, Value-Added Lettuces, Onions, Oranges, Idaho Russets</p> <p>Higher - Broccoli, Bell Peppers, Tomatoes, Strawberries</p>	<p>Improving/Steady - Lemons, Oranges,</p> <p>Good/Steady - Apples, Avocados, Onions, Idaho Russets</p> <p>Short/Strong - Broccoli, Iceberg, Romaine, Value-Added Lettuces, Strawberries, Bell Peppers, Tomatoes,</p>	<p>Apples, no change, tight supplies of smaller 125 & 138ct Apples</p> <p>Avocados, MX market soft as ample fruit on trees + low demand.</p> <p>Bell Peppers, FL supplies tight. MX volume to pick up in mid-Dec.</p> <p>Broccoli, Salinas recent rains tightened supply, market firming.</p> <p>Iceberg, Yuma supplies starting to improve. Demand still exceeds.</p> <p>escalated. Market exceptionally high.</p> <p>Romaine, Yuma supplies starting to improve. Light wts. Market high.</p> <p>weather slowed east coast production. MX Romas are tight. Markt active.</p> <p>temps have limited supplies. Fair quality.</p> <p>following rains. 113/88ct are peak sizes.</p> <p>Lemons, new area harvest starting.165/200ct limited.</p> <p>Onions, WA/ID/OR storage quality is good.</p> <p>ID Potato Bumper crop! Norkotah & Burbank avail. Market on floor.</p> <p>Value-Added remains</p> <p>Tomatoes, ongoing cool</p> <p>Strawberries, rains & cool</p> <p>Oranges, Navel in full swing</p>
 Sugar	<p>Steady →</p>	<p>Available - Steady</p>	<p>Domestic Sugar prices on both beet and cane have shown decreases as we have moved through 2025. The new crop harvest is underway and thus far yields are looking good. We do expect that this harvest will likely provide ample tonnage to support demand through next year. Based on such, look for pacing to remain near current levels as we move into 2026 on both cane and beet.</p> <p>Based on the solid supply levels of domestic raw materials, it is likely that imports from Mexico will remain low as we move into 2026 and through the first quarter of the year. The domestic crop will nicely supply our Foodservice demand at competitive prices.</p>
 Shell Eggs	<p>Decreasing ↓↓</p>	<p>Increasing Supply, Decreasing Demand</p>	<p>Egg demand continues to soften as supplies remain more than ample, leading to slow trading across shell and processed egg markets. Foodservice interest is light to moderate, particularly for liquid and frozen egg products, which are seeing weak undertones and reduced movement despite adequate supply.</p> <p>Processing activity increased sharply, with egg breaking up over 18% week-over-week and foodservice-oriented liquid whole egg production up 21%, while demand from distributors remains subdued. Retail activity has shifted toward cage-free and nutritionally enhanced eggs, but these trends are having limited effect on overall wholesale movement. No new HPAI outbreaks were reported, though flock losses for the year remain significant, continuing to affect both caged and cage-free production capacity. Source: USDA AMS as of December 17</p>
 Wheat (Flour Based Products)	<p>Steady →</p>	<p>Available - Steady</p>	<p>Flour prices have remained relatively steady over this past week based on steady production and healthy demand. As demand typically peaks in the fall, prices react based on individual plant capacity. As we are now moving through the final weeks of the holiday season, it is widely expected that prices on milled flour and products containing flour as a predominate ingredient, will show minimal changes in most markets. Supply is in solid position to support year-end demand.</p>

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