



PLAINS GRAINS INC.



HRW Crop Report

June 20, 2025

State Updates

Montana:

MT wheat crops (all classes) are going backwards as above normal temps and below normal rainfall are not conducive to healthy crops. Numerous hailstorms have recently caused significant damage, particularly in growing regions where the crops have better ratings. May and June moisture have been about 60% of normal over most major production areas. Winter wheat is maturing quickly and ahead of schedule, and spring wheat and durum are slow to emerge. Temps cool off over the weekend and with some rainfall in the forecast.

Colorado:

Good to excellent ratings rose again this week. We received more rain over the last week. Unfortunately some of it came with large hail, but I think damage is pretty isolated. We are going to have temperatures at or near 100 degrees over the weekend, so things will dry out quickly. I expect harvest to start in the southeast corner very soon. However, more rain is in the forecast next week, so that could delay things.

Oregon:

Largely unchanged from the report last week, so nothing of substance to add over prior report. Some cooler weather on the horizon for the end of this week.

Ohio:

Ohio wheat is starting to mature and beginning to turn color. The crop looks good, and we're expecting good yields and good quality. The weather has been hot, with some timely rains

helping the crop along. We should be harvesting in a couple of weeks.

Texas:

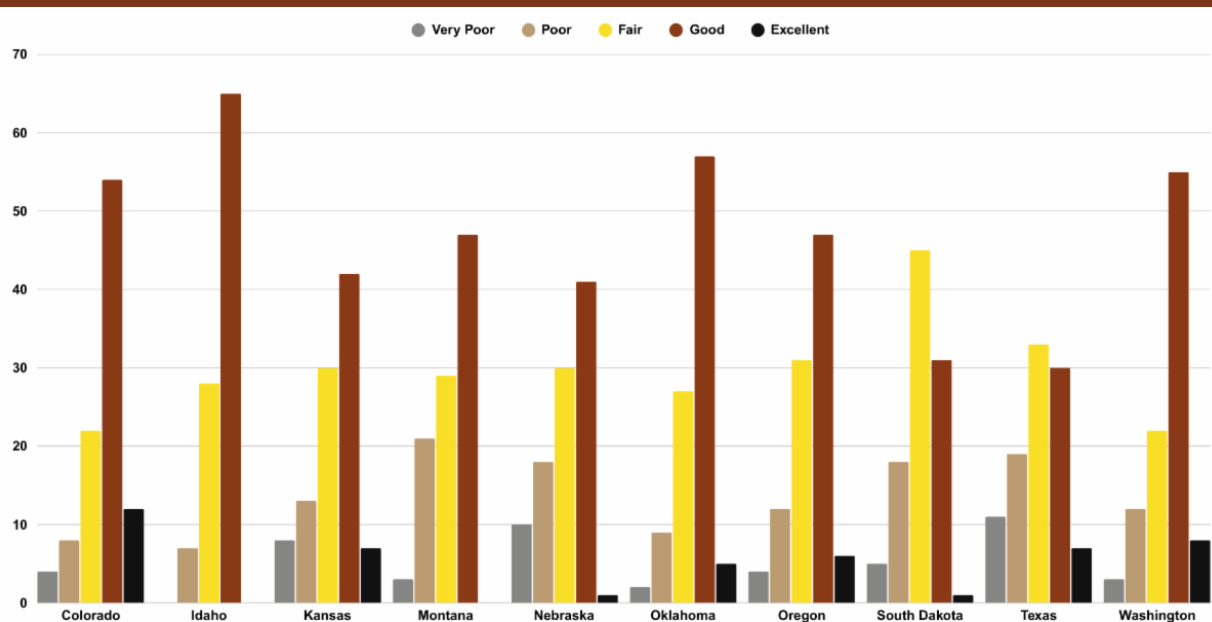
- NASS lowered our harvest estimates to 69 million bushels with an average yield of 30 bu/ac. Texas is estimated to be about 56% complete with harvest, down 1% from the 5-year average.
- Over the past week, forecasts have cleared up for many regions allowing fields to start drying out. However, there are still scattered evening thunderstorms that have stalled harvest operations in some areas.
- Harvest has resumed in many areas of the Rolling Plains region (between Lubbock and Wichita Falls) with test weights averaging 56.5 - 57 lb/bu. Producers in the Blacklands region (I-35 corridor, North and South of Dallas) have also been able to get back in the field despite muddy conditions. They report test weights around 57 lb/bu. There are still no producer reports of sprout issues in this area despite the heavy rainfall.
- With harvest about 12 - 15% complete in the Panhandle, early test weights are remaining consistent ranging from 58 - 62 lb/bu, with the majority of loads staying above 60 lb/bu. Scattered evening storms have impacted some areas in this region stalling harvest progress and causing isolated hail damage to some fields.

Winter Wheat Headed by State

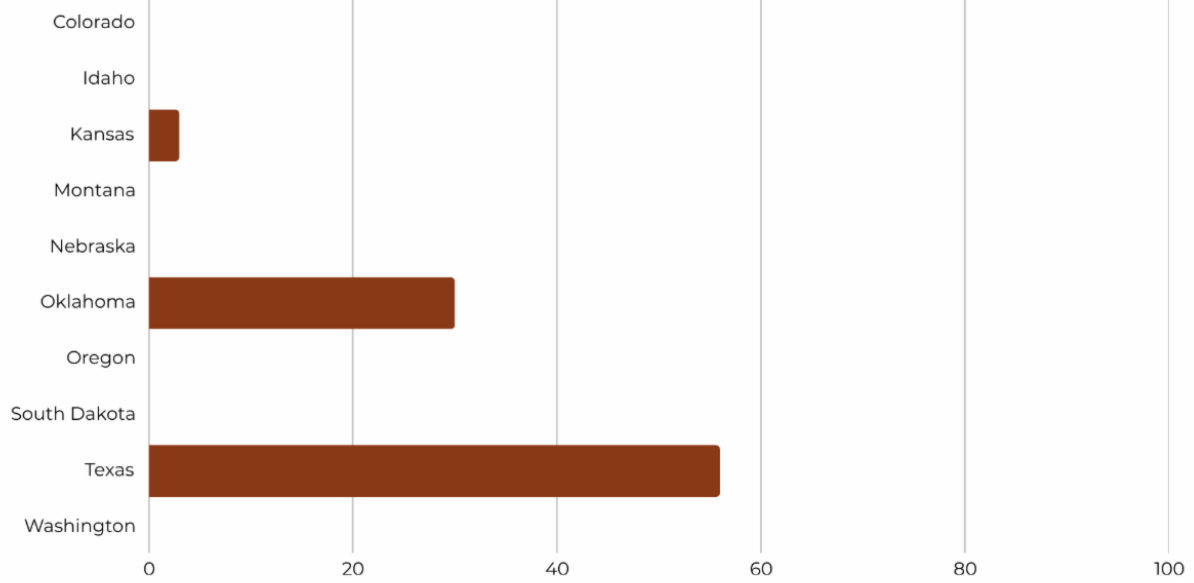
Texas - 100%
Oklahoma - 100%
Kansas - 98%
Oregon - 95%
Washington - 95%

Nebraska - 94%
Colorado - 90%
South Dakota - 78%
Idaho - 70%
Montana - 38%

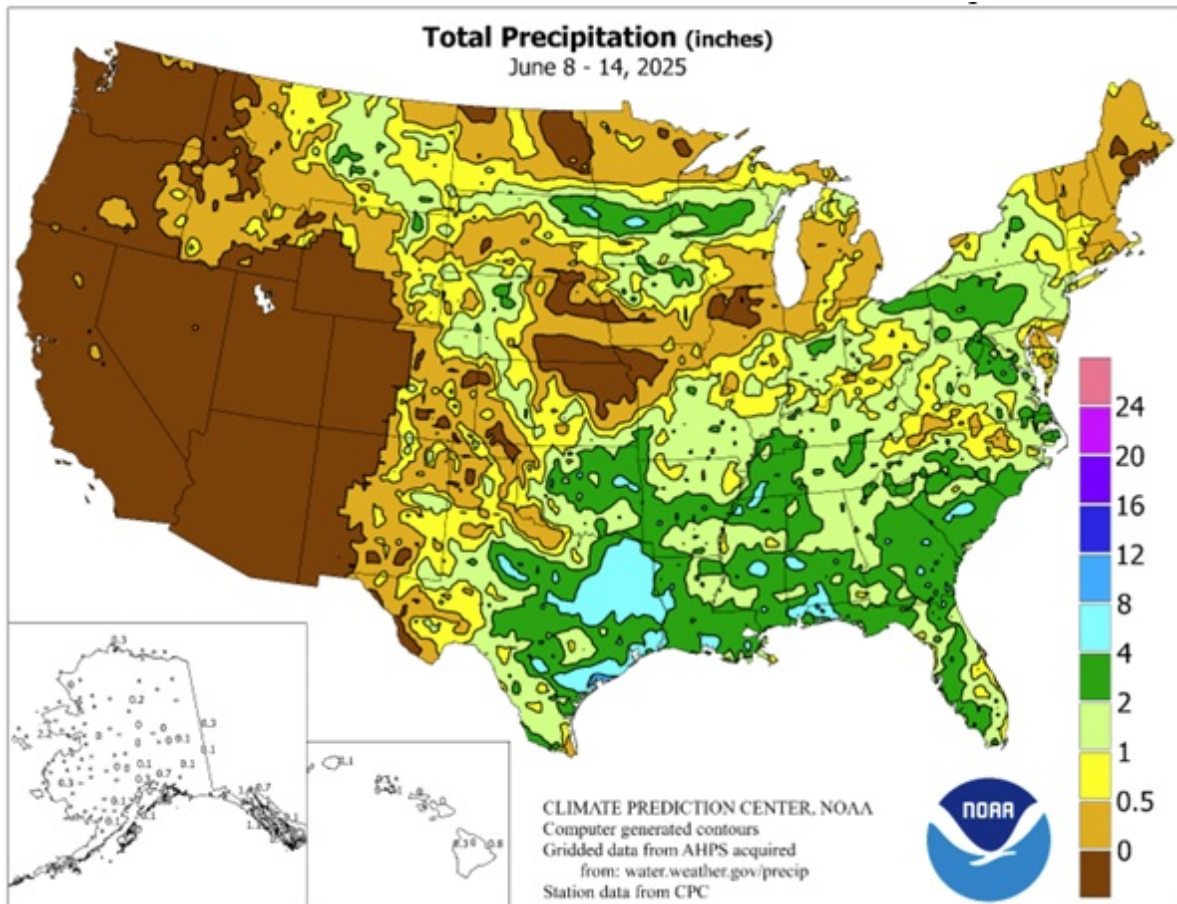
Wheat Condition



Winter Wheat Harvested by State



Weather Outlook



South Dakota Wheat



South Dakota Wheat Outlook

★ Wheat Progress

Revised June 20, 2025

As of June 15, 2025

	Winter Wheat		Spring Wheat	
	Headed %	xxxx	Headed %	Emerged %
2025	78	-	26	100
Last year	85	-	25	99
5-year avg	80	-	29	99

★ 2024-25 Winter Wheat Conditions

	Very Poor %	Poor %	Fair %	Good %	Excellent %
May 11	11	30	40	19	0
May 18	5	25	47	22	1
May 25	5	21	46	28	0
Jun 01	4	19	46	30	1
Jun 08	4	18	46	31	1
Jun 15	5	18	45	31	1

★ 2025 Spring Wheat Conditions

	Very Poor %	Poor %	Fair %	Good %	Excellent %
May 11	2	6	59	28	5
May 18	1	5	55	34	5
May 25	1	3	41	52	3
Jun 01	1	4	43	47	5
Jun 08	0	3	36	58	3
Jun 15	1	5	24	64	6

★ Soil Moisture

As of June 15, 2025

	Very Short %	Short %	Adequate %	Surplus %
Topsoil	4	26	64	6
Subsoil	13	29	55	3

World Agricultural Supply and Demand Estimates

As of June 12, 2025

- The outlook for 2025/26 U.S. wheat is for slightly larger supplies, unchanged domestic use, higher exports, and lower ending stocks. Average farm price is raised to \$5.40/bu.
- The 2025/26 global wheat outlook is for reduced supplies, higher consumption and trade, and lower ending stocks. Production is estimated at 808.5 million tons.
- World ending stocks for 2025/26 are lowered 3.0 million tons to 262.8 million tons. Global consumption is raised 1.8 million tons to 809.8 million tons.

South Dakota Wheat Stocks

As of March 1, 2025

- Total stocks: 53.5 million bushels (+22% from 2024)
- On-farm stocks: 28.0 million bushels (+27% from 2024)
- Off-farm stocks: 25.5 million bushels (+17% from 2024)

2025 South Dakota Winter Wheat

As of June 12, 2025

- 800,000 acres est. planted (-7% from 2024)
- 700,000 acres projected harvested (-9% from 2024)
- 88% of planted acres projected harvested (unch. from 2024)
- 32.9 million bushels projected harvested (-31% from 2024)
- 47 bushels per acre projected harvested (-16 bu/ac from 2024)

2024 South Dakota Winter Wheat

As of September 30, 2024

- 860,000 acres est. planted (-7% from 2023)
- 760,000 acres est. harvested (+13% from 2023)
- 88% of planted acres est. harvested (+12% from 2023)
- 47.9 million bushels harvested (+52% from 2023)
- 63 bushels per acre harvested (+16 bu/a from 2023)

2025 South Dakota Spring Wheat

As of March 31, 2025

- 660,000 acres est. planted (+0% from 2024)

2024 South Dakota Spring Wheat

As of September 30, 2024

- 660,000 acres est. planted (-11% from 2023)
- 635,000 acres projected harvested (-2% from 2023)
- 96% of planted acres est. harvested (+8% from 2023)
- 31.1 million bushels harvested (+11% from 2023)
- 49 bushels per acre harvested (+6 bu/a from 2023)

Source: USDA NASS www.nass.usda.gov

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South Dakota Wheat Commission

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★ Identifies data changed since last report

Nebraska Wheat Crop Report

District 1 Report

Wheat across the state is currently 94% headed. Recent rains totaling 4–5 inches over the past three weeks have significantly boosted the wheat outlook across District 1, particularly benefiting late-emerging stands. However, upcoming extreme heat raises concerns for optimal grain fill.

Fields previously released from insurance are now being cut as wheat hay for forage. A localized hailstorm east of Hemingford destroyed several hundred acres. Yields will vary field by field due to uneven stands and are predicted to be average at best, with harvest expected to span throughout July. Maturity is also inconsistent, with some parts of fields turning while other sections are just finishing heading.

Disease pressure remains low, though stem sawfly activity has been noted. Its full impact will be assessed at harvest, as it is still too early to determine damage. Following the recent rains,



herbicide applications have been widespread to manage weed growth.

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Colorado Wheat



Colorado Wheat Outlook

As of June 20, 2025

* Wheat Progress – 2025 Crop June 15, 2025

* 2025 Winter Wheat Condition

May 25:	5% Very Poor	10% Poor	34% Fair	43% Good	8% Excellent
June 1:	5% Very Poor	8% Poor	32% Fair	47% Good	8% Excellent
June 8:	3% Very Poor	6% Poor	25% Fair	56% Good	10% Excellent
June 15:	4% Very Poor	8% Poor	22% Fair	54% Good	12% Excellent

* Moisture As of June 8, 2025

Topsoil:

7%	Very Short
30%	Short
63%	Adequate
0%	Surplus

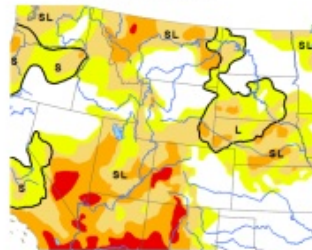
Subsoil:

11%	Very Short
40%	Short
49%	Adequate
0%	Surplus

* Regional drought map

Colorado as of June 17, 2025

15.0%	Abnormally dry
24.4%	Moderate drought
14.7%	Severe drought
5.4%	Extreme drought
0%	Exceptional drought



Colorado Wheat Stocks

As of March 1, 2025

- Total stocks: 34.63 million bushels (down 3% from a year ago)
- On-farm stocks: 7.7 million bushels (up 10% from a year ago)
- Off-farm stocks: 26.93 million bushels (down 7% from a year ago)

2025 Colorado Winter Wheat

As of June 1, 2025

- Winter wheat production in Colorado is forecast at 69.6 million bushels, according to the June 1 Agricultural Yield Survey conducted by the Mountain Regional Field Office of the National Agricultural Statistics Service, USDA.
- Average yield is forecast at 37.0 bushels per acre, down 1.0 bushel from May's yield estimate

World Agricultural Supply and Demand Estimates

As of June 12, 2025

- The outlook for 2025/26 U.S. wheat this month is for slightly larger supplies, unchanged domestic use, higher exports, and lower ending stocks.
- Supplies are raised on minimally higher output as all wheat production is projected at 1,921 million bushels, up 115,000 bushels from last month as higher Soft Red Winter and White Winter production offset lower Hard Red Winter (HRW) production.
- Exports are raised 25 million bushels to 825 million on strong early 2025/26 sales, especially for HRW.
- W. Projected 2025/26 ending stocks are lowered 25 million bushels to 898 million but are still 7 percent above last year.
- This month's 2025/26 global wheat outlook is for reduced supplies, higher consumption and trade, and lower ending stocks.
- Supplies are projected down 1.2 million tons to 1,072.6 million, mainly on reduced beginning stocks for Russia more than offsetting higher production for the EU and India.

Sources: USDA NASS www.nass.usda.gov |
droughtmonitor.unl.edu, drought.gov...

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* Identifies data changed since last report

Calendar of Events

Wheat Field Days

June 18 - August 28: Montana State University

FOR MORE INFORMATION

July 14 - August 7: North Dakota State University

FOR MORE INFORMATION



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