

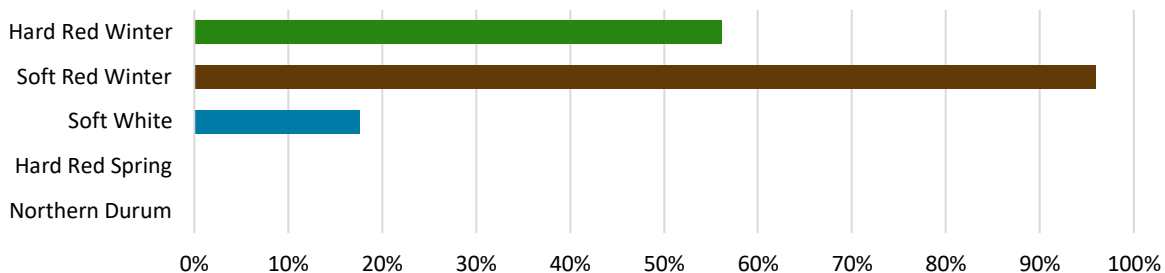


WEEKLY HARVEST REPORT – July 23, 2021

The U.S. winter wheat harvest is approaching 60% complete as combines are running in drier areas of the Plains. HRW crop conditions remain variable. Harvest of a larger SRW crop is almost complete and all samples have been tested. With above-normal temperatures and very little rain in South Dakota, North Dakota and Montana, the HRS crop conditions declined again this week. Harvest of winter SW is progressing well ahead of normal in the dry Pacific Northwest. Durum conditions are slightly better than HRS but remains drought and heat stressed.

USDA estimates winter wheat production at 1.36 billion bushels (37.1 MMT), an increase of 16% from last year and up 4% from June; spring wheat production is estimated at 345 million bushels (9.4 MMT), a 41% decrease from 2020; and durum production is forecast at 37.2 million bushels (1.0 MMT), a 46% decrease from last year.

Estimated Percent of Sample Crop Harvested to Date
(data: NASS Weekly Crop Progress Reports and industry sources)



HARD RED WINTER

- **Crop Progress:** With drier conditions, the HRW harvest, now north of Kansas, is moving fast. Cutting is at least 65% complete in Colorado and Nebraska. Industry sources in dry South Dakota expect 75% of HRW planted area will be harvested by next week but some of those fields will be cut and baled for hay. USDA’s current estimate of 2021/22 HRW production is 805 mil bu (21.9 MMT), a 22% increase over last year.
- **Crop Conditions:** Industry sources most often use the term “variable” when describing the condition of the remaining HRW crop. Prolonged heat and drought in Montana and the Pacific Northwest (PNW) have certainly stressed the crop, but industry sources suggest that fields planted following fallow are yielding significantly more bushels. Insect damage from stem sawfly and grasshoppers remain a concern.
- **Weather:** Another heatwave across the northern states and PNW is expected next week, a forecast that is likely to support the rapid harvest pace. Concern about soil moisture for the next crop is growing.
- **Wheat Data:** Samples in various stages of testing jumped from 266 to 345 this week with new samples coming from western and northern areas. There was no change in protein at 11.4% (12% mb) with higher levels expected from drier areas. Other kernel factors are down some this week, including test weight (60.9 lb/bu) and TKW (30.8g down from (down from last week’s 31.7g). The average grade remains No. 1 HRW.

| WHEAT DATA | | | | | | | | | GRADE FACTORS | | | | | | |
|------------|---------|----------|------------|-----------|---------------------|-----------|--------|--------|---------------|-------------|-------|------|----------|-------|-----------|
| | Samples | | Moisture % | Protein % | Dry Basis Protein % | Dockage % | TKW gm | FN sec | Grade | Test Weight | | FM % | Damage % | S&B % | Defects % |
| | Tested | Expected | | | | | | | | lb/bu | kg/hl | | | | |
| This Week | 345 | 500 | 11.3 | 11.4 | 13.0 | 0.5 | 30.8 | 275 | 1 HRW | 60.9 | 80.2 | 0.2 | 0.5 | 0.8 | 1.5 |
| Last Week | 266 | 500 | 11.3 | 11.4 | 13.0 | 0.5 | 31.7 | 280 | 1 HRW | 61.4 | 80.8 | 0.3 | 0.4 | 0.8 | 1.5 |
| 2020 Final | 431 | 500 | 10.9 | 11.9 | 13.5 | 0.5 | 31.6 | 367 | 1 HRW | 61.7 | 81.1 | 0.2 | 0.2 | 1.1 | 1.5 |
| 5-year Avg | 486 | 493 | 11.0 | 11.6 | 13.2 | 0.6 | 32.3 | 377 | 1 HRW | 60.9 | 80.1 | 0.1 | 0.2 | 0.9 | 1.2 |

Legend: Protein = 12% Moisture Basis
TKW = 1000 Kernel Weight

FN = Falling Number
FM = Foreign Material

S&B = Shrunken and Broken
n/a = not available

Note: HRW averages in the weekly harvest report are not weighted for production. Results shown represent tested samples collected to date.

Data Source: Plains Grains, Inc.

SOFT RED WINTER

- **Crop Progress:** Only some fields in northern states like Michigan are left to cut from what is a high-yielding, average to good quality crop estimated by USDA at 362 mil bu (9.9 MMT).
- **Weather:** Most of the SRW production region continues to have adequate soil moisture with seeding dates as little as 60 days away.
- **Wheat Data:** Sampling and testing of 263 individual samples from all areas is now complete. Protein, 1000 kernel weight and falling number are all relatively unchanged from last week. Average test weight in 2021 of 59.5 matches 2020 samples compared to the 5-year average of 58.2.
- **Flour Data:** Milling yield and flour ash from Missouri and Alabama samples are unchanged from last year but a little higher in southern Ohio. The cookie w/t factors for eastern Maryland, Missouri and southern Ohio, are all higher in 2021 than in 2020. Bake volume was lower in Missouri, but higher in eastern Maryland and Alabama.

| WHEAT DATA | | | | | | | | | GRADE FACTORS | | | | | | |
|------------|---------|----------|------------|-----------|---------------------|-----------|--------|--------|---------------|-------------|-------|------|----------|-------|-----------|
| | Samples | | Moisture % | Protein % | Dry Basis Protein % | Dockage % | TKW gm | FN sec | Grade | Test Weight | | FM % | Damage % | S&B % | Defects % |
| | Tested | Expected | | | | | | | | lb/bu | kg/hl | | | | |
| This Week | 263 | 300 | 13.6 | 9.4 | 10.7 | 0.2 | 34.3 | 294 | 2 SRW | 59.5 | 78.3 | 0.1 | 0.6 | 0.6 | 1.2 |
| Last Week | 230 | 300 | 13.5 | 9.4 | 10.7 | 0.2 | 34.3 | 291 | 2 SRW | 59.5 | 78.3 | 0.1 | 0.6 | 0.6 | 1.2 |
| 2020 Final | 191 | 300 | 13.3 | 9.4 | 10.6 | 0.3 | 33.5 | 319 | 2 SRW | 59.5 | 78.3 | 0.1 | 0.4 | 0.5 | 0.9 |
| 5-year Avg | 320 | 339 | 12.6 | 9.6 | 10.9 | 0.4 | 32.0 | 313 | 2 SRW | 58.2 | 76.6 | 0.1 | 0.9 | 0.6 | 1.5 |

Note: SRW averages in the weekly harvest report are simple averages of all samples tested and have not been weighted by the estimated production for each of the 18 reporting areas.

Data Source: Great Plains Analytical Laboratory

SOFT WHITE

- **Crop Progress:** In the very dry Pacific Northwest (PNW), the winter SW harvest pace is rapid and likely to be well past USDA’s current estimates of 40% in Oregon, 30% in Washington and 15% in Idaho. Spring SW harvest has just started in Washington. USDA currently estimates SW winter production at 181 mil bu (4.9 MMT), a 23% decrease from last year, and SW spring at 30.8 mil bu (0.8 MMT), a 32% decrease from last year. First sample testing results are expected next week.
- **Crop Conditions:** The impact of the unrelenting drought on the 2021/22 SW winter and spring crops in the PNW is well-known. Yields are down and industry sources expect more planted area will be abandoned as harvest progresses. Though protein levels are up generally, there are still some lower protein counts being reported. For buyers, this will be a good year to better understand SW protein *performance* verses protein *levels*; your local USW representative can help.
- **Weather:** Harvest will accelerate as the heat wave is forecast to continue into next week. In a unique situation, smoke from the many wildfires in the region has filtered sunlight and lowered temperatures and slowed crop maturity a bit. Growers now, however, are starting to look for any moisture ahead of seeding the next winter wheat crop.

| WHEAT DATA | | | | | | | | | GRADE FACTORS | | | | | | |
|------------|---------|----------|------------|-----------|---------------------|-----------|--------|--------|---------------|-------------|-------|------|----------|-------|-----------|
| | Samples | | Moisture % | Protein % | Dry Basis Protein % | Dockage % | TKW gm | FN sec | Grade | Test Weight | | FM % | Damage % | S&B % | Defects % |
| | Tested | Expected | | | | | | | | lb/bu | kg/hl | | | | |
| 2020 Final | 389 | 390 | 9.2 | 9.8 | 11.1 | 0.5 | 36.3 | 323 | 1 SW | 61.9 | 81.4 | 0 | 0 | 0.4 | 0.5 |
| 5-year Avg | 443 | 394 | 9.3 | 9.8 | 11.1 | 0.5 | 36.0 | 319 | 1 SW | 61.4 | 80.7 | 0.0 | 0.0 | 0.5 | 0.6 |

Note: SW averages in the weekly harvest report are weighted for production. Results shown represent tested samples collected to date.

Data Source: Wheat Marketing Center

HARD RED SPRING

Legend: Protein = 12% Moisture Basis
 TKW = 1000 Kernel Weight
 FN = Falling Number
 FM = Foreign Material
 S&B = Shrunken and Broken
 n/a = not available

- **Crop Progress:** With most of the HRS crop headed out (92% per USDA), about 40% has started to color and 5% is rated as mature. Early planted fields are ripening quickly and combines may open some fields soon. USDA currently estimates HRS production at 305 mil bu (8.3 MMT), a 42% decrease from last year.
- **Crop Conditions:** Participants in the Wheat Quality Council Spring Wheat Tour next week will see a stressed crop. According to the most recent USDA Crop Progress report, only 11 percent of the U.S. HRS crop is rated in good to excellent condition, down from 16 percent last week and 70 percent last year. Over half of the crop is rated as being in poor to very poor condition.
- **Diseases/Pest Pressure:** Grasshoppers and sawfly have been noted and are being monitored.
- **Weather:** Following some cooling and rain in areas that had missed the precipitation this week, temperatures again are forecast above normal with only isolated rain potential.

| WHEAT DATA | | | | | | | | | GRADE FACTORS | | | | | | | |
|------------|---------|----------|------------|-----------|---------------------|-----------|--------|--------|---------------|-------------|-------|------|----------|-------|-----------|-------|
| | Samples | | Moisture % | Protein % | Dry Basis Protein % | Dockage % | TKW gm | FN sec | Grade | Test Weight | | FM % | Damage % | S&B % | Defects % | DHV % |
| | Tested | Expected | | | | | | | | lb/bu | kg/hl | | | | | |
| 2020 Final | 475 | 451 | 11.9 | 14.4 | 16.4 | 0.7 | 31.8 | 390 | 1 NS | 61.6 | 81 | 0 | 0.5 | 0.6 | 1.1 | 67 |
| 5-year Avg | 472 | 465 | 12.1 | 14.5 | 16.5 | 0.7 | 32.0 | 401 | 1 DNS | 61.2 | 80.4 | 0.0 | 0.2 | 0.8 | 0.9 | 77 |

Note: HRS averages in the weekly harvest report are not weighted for production. Results shown represent tested samples collected to date.

Data source: North Dakota State University, Hard Red Spring Wheat Quality Laboratory

NORTHERN DURUM

- **Crop Progress:** The North Dakota crop is 80% headed out, which is slightly behind average but 30% has started to color ahead of average. Montana’s crop is maturing as well but the effect of smoky air may be delaying progress. USDA currently estimates durum production at 37.2 mil bu (1.0 MMT), a 46% decrease from last year.
- **Crop Conditions:** With production areas missing last week’s rain, condition ratings for North Dakota fell this week as the hot, dry conditions are stressing the durum crop. According to the USDA Crop Progress Report, a third of the state’s crop is rated in good to excellent condition, down from 45 percent a week ago. Industry sources in Montana suggest the durum crop condition is still slightly better than the states HRS condition.
- **Weather:** The forecast for the week of July 25 calls for another prolonged period of heat and limited rain potential.

| WHEAT DATA | | | | | | | | | GRADE FACTORS | | | | | | | |
|------------|---------|----------|------------|-----------|---------------------|-----------|--------|--------|---------------|-------------|-------|------|----------|-------|-----------|--------|
| | Samples | | Moisture % | Protein % | Dry Basis Protein % | Dockage % | TKW gm | FN sec | Grade | Test Weight | | FM % | Damage % | S&B % | Defects % | HVAC % |
| | Tested | Expected | | | | | | | | lb/bu | kg/hl | | | | | |
| 2020 Final | 102 | 120 | 10.9 | 13.6 | 15.5 | 1.1 | 46.4 | 418 | 1 HAD | 61.9 | 80.6 | 0 | 0.7 | 0.6 | 1.3 | 88.8 |
| 5-year Avg | 111 | 117 | 11.4 | 13.9 | 15.8 | 1.1 | 41.6 | 394 | 1 HAD | 61.0 | 79.4 | 0.0 | 0.4 | 0.8 | 1.3 | 81.4 |

Note: Northern durum averages in the weekly harvest report are not weighted for production. Results shown represent tested samples collected to date.

Data source: North Dakota State University, Durum Wheat Quality Laboratory

RESOURCES

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| <p>California Wheat Commission Laboratory</p> <p>Colorado Wheat Blog</p> <p>Great Plains Analytical Laboratory</p> <p>Kansas Wheat Harvest Update</p> <p>Montana Crop Progress Report</p> <p>Nebraska Crop Report</p> | <p>North Dakota Crop Progress Report</p> <p>Plains Grains Inc.</p> <p>South Dakota Wheat Outlook</p> <p>Texas Wheat Harvest Update</p> <p>Wheat Marketing Center</p> | <p style="text-align: center;">Questions?</p> <p>Please contact USW Director of Programs Erica Oakley at eoakley@uwheat.org</p> <p>Subscribe here to receive this report by email</p> <p style="text-align: center;">www.uswheat.org Facebook Twitter LinkedIn Vimeo</p> |
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