U.S. WHEAT ASSOCIATES
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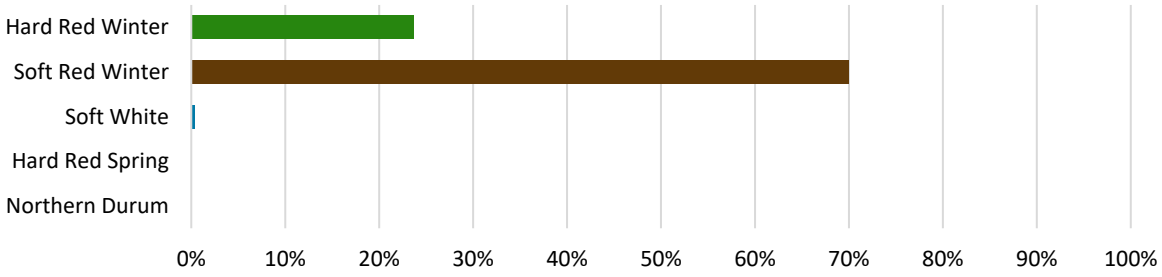
WEEKLY HARVEST REPORT – July 7, 2023

The HRW harvest has nearly wrapped up in Texas and Oklahoma, while weather events continue to slow progress in Kansas. Harvest continues to progress in the SRW growing region with little to no change in data. Rain is needed in the HRS and northern durum growing regions for optimal crop development. In the Pacific Northwest, warmer weather is accelerating crop maturation.

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



HARD RED WINTER

- **Crop Progress:** The 2023 HRW wheat harvest continued to be slow last week due to scattered showers and severe thunderstorms. Local representatives estimate that the HRW harvest is 86% complete in Texas, 90% in Oklahoma, 55% in Kansas and 20% in Nebraska. In the Central Plains, rain and cool temperatures are delaying crop maturation. In contrast, the PNW crop is maturing quickly with heat and dryness and harvest of the Oregon HRW crop is underway.
- **Crop Conditions:** Like last week, producers report variable yields based on environmental factors. For quality, protein is trending higher than average and test weights have been lower in areas that received moisture at harvest, but still trend higher than expected. In the Central Plains, representatives report uneven ripening of fields, and need heat to dry the crop ahead of harvest. In Oregon, the crop is expected to be low yielding due to early season heat and dryness.
- **Disease/Pest Pressure:** Isolated reports of weed, disease and pest pressures have been noted throughout the growing region. Disease pressure remains low in the drier areas.
- **Wheat Data:** There are currently 119 samples in the lab undergoing analysis. Preliminary data continue to show larger kernel size compared to last year, average protein of 13.2% (12% mb), test weights between 57.9 and 62.3 lb/bu (76.2 and 81.9 kg/hl), falling number of 361 seconds and slightly lower kernel hardness.
- **Weather**: Heavy rains and severe thunderstorms continue in the Southern Plains where producers are watching for quality impacts. In Colorado, Wyoming and South Dakota, producers are hoping for dryer and/or warmer weather ahead of harvest.

WHEAT DATA

	Samples		Moisture	Protein	Dry Basis Protein	Dockage	TKW	FN
	Tested	Expected	%	%	%	%	gm	sec
2022 Final	524	500	10.2	13.0	14.8	0.5	31.4	361
5-year Avg	488	500	11.1	11.6	13.2	0.5	31.3	370

GRADE FACTORS

Grade	Test Weight		FM	Damage	S&B	Defects
	lb/bu	kg/hl	%	%	%	%
1 HRW	61.0	80.2	0.1	0.5	1.1	1.8
1 HRW	60.9	80.0	0.2	0.6	0.9	1.4

Note: HRW averages in the weekly harvest report are not weighted for production. Results shown represent tested samples collected to date. Data and commentary are on the following sampled states only: CO, ID, KS, MT, NE, OK, OR, SD, TX, WA, WY.

Data Source: Plains Grains, Inc.

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

SOFT RED WINTER

- **Crop Progress:** Despite weather events, SRW harvest is more than 70% complete. In Maryland and Ohio, wheat harvest is slowly progressing between rain showers.
- **Crop Conditions:** This week's NASS report indicated crop conditions were 70% good to excellent in Indiana, 63% in Ohio and 79% in Maryland. In Maryland, state representatives report favorable yields though test weights have been lower in areas with more moisture. Ohio representatives report crop variability as southern Ohio has been dry while central Ohio has been very wet.
- **Disease/Pest Pressure:** No disease or pest pressures reported. Overall, disease prevalence has been low due to a mild winter and cooler, drier spring and despite recent rain events, no DON (vomitoxin) has been reported.
- **Wheat Data:** There are 134 samples undergoing lab analysis. With a slight decline in test weight, this crop now grades a U.S. No. 2 SRW. Otherwise, there was minimal to no change in unweighted test results.
- **Weather:** Much of the growing region experienced heat, humidity and precipitation this past week, slowing harvest progress.

WHEAT DATA

	Samples		Moisture	Protein	Dry Basis Protein	Dockage	TKW	FN
	Tested	Expected	%	12% mb	%	%	gm	sec
This Week	134	300	13.0	9.5	10.8	0.5	35.9	325
Last Week	87	300	13.0	9.6	10.9	0.7	35.5	321
2022 Final	229	300	12.4	9.6	10.9	0.4	32.9	327
5-year Avg	242	300	13.3	9.5	10.8	0.3	32.7	309

GRADE FACTORS

Grade	Test Weight		FM	Damage	S&B	Defects
	lb/bu	kg/hl	%	%	%	%
2 SRW	59.7	78.5	0.2	0.4	0.4	0.9
1 SRW	60.3	79.3	0.2	0.4	0.4	0.9
1 SRW	60.1	79.1	0.1	0.2	0.6	0.9
2 SRW	58.9	77.5	0.1	0.5	0.6	1.2

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 and commentary are on the following sampled states only: AL, AR, IL, IN, KY, MD, MO, NC, OH, TN, VA.

Data Source: Great Plains Analytical Laboratory

SOFT WHITE

- **Crop Progress:** The winter wheat crop is 100% headed with test cutting in Oregon and Washington. In Idaho, fields are starting to turn color and harvest is expected to begin in 7-10 days. The spring crop is 90% headed in Washington, 62% in Idaho and 95% in Oregon.
- **Crop Conditions:** Conditions have varied in the PNW states. In Washington and Oregon, crop progress has accelerated with hotter, drier temperatures; representatives expect an average to below average crop with lower yields and higher protein. In Idaho, crop development has been slower with cooler spring temperatures; representatives report quality and yield projections look favorable.
- **Disease/Pest Pressure:** Soil-borne wheat mosaic virus was reported in northern Idaho. In Oregon, isolated reports of stripe rust and cereal leaf beetle. No significant disease pressure in Washington is reported.
- **Weather**: No precipitation and above average temperatures prevail in Washington and Oregon, while Idaho remains cooler. Portions of all three PNW states are abnormally to moderately dry, with pockets of severe drought.

WHEAT DATA

	Samples		Moisture	Protein	Dry Basis Protein	Dockage	TKW	FN
	Tested	Expected	%	%	%	%	gm	sec
2022 Final	404	390	8.9	9.5	10.8	0.5	34.8	340
5-year Avg	416	390	9.1	10.0	11.3	0.5	34.6	327

GRADE FACTORS

Grade	Test Weight		FM	Damage	S&B	Defects
	lb/bu	kg/hl	%	%	%	%
1 SW	61.0	80.2	0.1	0.1	0.5	0.6
1 SW	61.1	80.3	0.0	0.0	0.6	0.7

Note: SW averages in the weekly harvest report are weighted for production. Results shown represent tested samples collected to date. Data and commentary are on the following sampled states only: ID, OR, WA.

Data Source: Wheat Marketing Center

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

HARD RED SPRING

- **Crop Progress:** Nearly 60% of the U.S. crop has headed, ahead of the 5-year average and well ahead of last year. By state, South Dakota is 89% headed, Minnesota is 67%, Montana is 33%, and North Dakota is 47%.
- **Crop Conditions:** State representatives report that crop conditions are variable and depend on plant date and environmental conditions. Eastern North Dakota, northern South Dakota and western Minnesota are abnormally dry to moderate drought, negatively impacting yield potential. Western North Dakota and eastern Montana have more favorable soil moisture conditions, but overly dry areas are expanding.
- **Disease/Pest Pressure:** There are isolated reports of foliar diseases, and grasshoppers in drier areas.
- **Weather:** Cooler temperatures are forecast which will help stabilize the crop, but timely rainfall will be needed for optimal crop development and yield potential.

WHEAT DATA

	Samples		Moisture	Protein	Dry Basis Protein	Dockage	TKW	FN
	Tested	Expected	%	%	%	%	gm	sec
2022 Final	423	450	11.6	14.3	16.2	0.6	30.4	386
5-year Avg	463	450	12.0	14.6	16.6	0.5	30.7	375

GRADE FACTORS

Grade	Test Weight		FM	Damage	S&B	Defects	DHV
	lb/bu	kg/hl	%	%	%	%	%
1 NS	62.1	81.6	0.0	0.2	1.0	1.2	74
1 NS	61.5	80.9	0.0	0.3	0.9	1.2	73

Note: HRS averages in the weekly harvest report are not weighted for production. Results shown represent tested samples collected to date. Data and commentary are on the following sampled states only: MN, MT, ND, SD.

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

NORTHERN DURUM

- **Crop Progress:** The North Dakota durum crop is progressing ahead of average levels: 32% has headed out, up from 17% a week ago. In Montana, crop development is slower than average with 7% headed, below the 5-year average of 21%.
- **Crop Conditions:** The durum production area in eastern Montana and western North Dakota have missed recent rains, and the crop is starting to show signs of drought stress. Crop conditions declined slightly with North Dakota dropping to 64% good to excellent and Montana dropping to 28% good.
- **Weather:** Portions of the durum region have received little to no recent precipitation and are classified abnormally dry; producers continue to hope for precipitation to aid in crop development.

WHEAT DATA

	Samples		Moisture	Protein	Dry Basis Protein	Dockage	TKW	FN
	Tested	Expected	%	%	%	%	gm	sec
2022 Final	121	122	11.0	13.7	15.6	1.1	40.4	433
5-year Avg	113	122	11.3	14.4	16.3	0.9	42.3	399

GRADE FACTORS

Grade	Test Weight		FM	Damage	S&B	Defects	HVAC
	lb/bu	kg/hl	%	%	%	%	%
1 HAD	61.8	80.4	0.0	0.1	1.0	1.1	11.0
1 HAD	61.1	79.5	0.0	0.7	0.9	1.6	11.3

Note: Northern durum averages in the weekly harvest report are not weighted for production. Results shown represent tested samples collected to date. Data and commentary are on the following sampled states only: ND, MT.

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