Idaho Grain Market Report, May 1, 2025—NEW CROP PRICES

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Prices paid by Idaho Elevators delivered to warehouses in specified locations for barley and wheat on Wednesday April 30, 2025. Barley prices in $/Cwt. And wheat prices in $/bu

	Barley (Cwt.) FEED 48 lbs or better	MALTING Open Market Malting	Wheat (bu.) Milling #1 SWW	#1 HRW 11.5% Protein	#1 DNS 14% Protein	#1 HWW
Rexburg / Ririe	No Bid		No Bid	No Bid	No Bid	No Bid
Colfax, WA	8.50		5.25	4.61	5.41	
Michaud			6.25	5.64		
Grace / Soda Springs	8.00		4.65	4.84	6.00	5.15
Twin Falls / Buhl Jerome / Wendell	9.00-9.20		4.75			
Meridian	8.50		5.25	4.61	5.41	
Nezperce / Craigmont Does not include delivery			6.25	5.49		
Lewiston Does not include delivery			6.25	5.49		
Moscow / Genesee Does not include delivery	8.50		6.25	5.49-5.66	6.60	

Prices at Selected Terminal Markets, cash FOB
Wednesday April 30, 2025 Barley prices in $/Cwt. And wheat prices in $/bu.

	#2 Feed Barley 46 lbs. --	Malting Barley	#1 SWW	#1 HRW 12% Protein	#1 DNS 13% Protein	#1 HWW
Portland			6.20-6.25	5.49-5.65	6.62-6.84	
Ogden			5.05		6.75	5.84
Great Falls	6.25			4.55-4.75	5.52-5.71	
Minneapolis				5.95	8.37-8.47	

Market News and Trends This Week

BARLEY—Idaho cash feed barley prices were unchanged for the week ending April 30. Idaho cash malt barley prices were unchanged. Net sales reductions of 5,700 MT were reported for 2024/2025 to Canada. Total net sales of 2,100 MT to Canada for the week of April 18-24. No exports were reported for 2024/2025 for the week of April 18-24.

Barley News—The Brewers Association (BA)—the trade association representing small and independent American craft brewers— released its annual production figures for the U.S. craft brewing industry, highlighting the new realities of a maturing market in a rapidly evolving environment. Craft brewers produced 23.1 million barrels of beer in 2024, a 4.0% decrease from 2023. However, craft's market share by volume remained essentially flat at 13.3%, the same share as in 2023, as the overall U.S. beer market declined by 1.2% in volume. Employment in the craft brewing sector grew to 197,112 in 2024, a 3.0% increase over the previous year. The rise was driven by the shift toward hospitality-focused models such as taprooms and brewpubs, which create more jobs in local communities. Craft beer's retail dollar value rose to an estimated $28.9 billion, a 3% increase over the previous year. This growth reflects pricing adjustments and steady performance in onsite sales, which outpaced distributed sales in many markets. Craft beer accounted for 24.7% of the total beer market in retail dollar sales. In 2024, the number of operating U.S. craft breweries was 9,612, including 1,934 microbreweries, 3,389 brewpubs, 3,695 taproom breweries, and 266 regional craft breweries. 2024 was the first year since 2005 that the overall number of operating craft breweries declined nationwide. The total number of breweries in the U.S. dropped to 9,680, down from 9,747 in 2023. Over the year, 434 new breweries opened while 501 closed. Although openings declined for the fourth consecutive year—reflecting a maturing and highly competitive industry—the closure rate remained relatively low at approximately 5%. (Brew Public)

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Market News and Trends This Week—continued

WHEAT—Idaho cash wheat prices were mostly down for the week ending April 30. SWW prices ranged from down $0.11 to up $0.01 from the previous week; HRW prices were down $0.31 to down $0.12; DNS prices were unchanged. HWW prices were unchanged. USDA FAS reported net sales of 72,000 MT for 2024/2025 for the period April 18-24 were down noticeably from the previous week and down 24 percent from the prior 4-week average. Increases primarily to the Thailand (58,000 MT), Nigeria (39,000 MT), Ecuador (36,200 MT), Colombia (28,100 MT), and Brazil (27,000 MT). Exports of 491,700 MT were up 3 percent from the previous week up 9 percent from the prior 4-week average were primarily to South Korea (165,500 MT), Mexico (69,700 MT), Taiwan (40,200 MT), Nigeria (39,00 MT), and Ecuador (36,200 MT).

Wheat News- Agriculture experts are warning wheat streak mosaic virus might be bad for farmers this year. Oklahoma State University (OSU) Extension said the virus was observed in Blaine, Kay, Caddo and Garfield counties in April alone. Earlier this year, the virus was found in wheat crops in Garfield and Payne counties. On April 28, high levels of the virus were observed at the OSU North Central Research Station in Lahoma. The most severe symptoms were found in the Gallgher, Paradox, and Turret 25 wheat varieties. Agriculture experts in Kansas are also reporting high levels of wheat streak mosaic virus this year. Wheat streak mosaic virus is transmitted by the wheat curl mite, which over summers on volunteer wheat and grassy weeds. The best way to prevent the virus from affecting crops is to destroy volunteer wheat and grassy weeds at least 2 weeks before planting. Some wheat varieties offer limited resistance to the virus, but once symptoms appear in spring, options are limited. (OKCfox.com) In other news, Attention wheat growers, the National Wheat Yield Contest is open for entries until May 15. Wheat growers with at least 50 total acres of wheat in production and with a minimum 5-acre contest field may participate. Complete rules can be found at the Wheat Yield Contest website. The National Wheat Foundation hosted the National Wheat Yield Contest for the first time in 2016 and was well-received by wheat growers across the United States, offering growers the opportunity to compete with their peers. The contest allows growers to share and learn innovative techniques to improve wheat productivity on their farms to ensure an ample supply of quality U.S. wheat to reliably meet the needs of the domestic wheat market and our foreign customers. For more information, visit (https://wheatfoundation.org/wheat-yield-contest/)

CORN—USDA FAS reported net sales for 2024/2025 for period April 18-24 were 1,014,400 MT, were to Mexico (451,400 MT), Colombia (166,200 MT), Israel (130,700 MT), South Korea (122,500 MT), and Vietnam (103,000 MT). Exports of 1,598,100 MT were primarily to Mexico (504,600 MT), Japan (376,800 MT), Colombia (205,200 MT), Morocco (79,600 MT), and Taiwan (78,600 MT).

Ethanol Corn Usage—DOE's Energy Infor. Agency (EIA) reported ethanol production for the week April 25 was 1.040 million bbls/day up 0.7 percent from the previous week and up 5.4 percent from last year. Total ethanol production for the week was 7.280 million barrels. Ethanol stocks were 25.389 million bbls, down 0.4 percent from last week and down 0.4 percent from last year. An estimated 104.93 million bu of corn was used in last week's production bringing this crop year's cumulative corn usage for ethanol production at 3.662 billion bu. Corn used needs to average 100.51 million bu per week to meet USDA estimate of 5.500 billions bu for the crop year.

Futures Market News and Trends—Week Ending May 1, 2025

FUTURES MARKET SETTLEMENT PRICES for the Week Ending Thursday, May 1, 2025:

Commodity	May 2025	Week Change	July 2025	Week Change	Sept 2025	Week Change	Dec 2025	Week Change
CHI SRW	$5.15¼	-$0.14¾	$5.31	-$0.14	$5.45¼	-$0.14¼	$5.68¼	-$0.14
KC HRW	$5.16	-$0.22	$5.27½	-$0.23½	$5.42	-$0.24¼	$5.65¾	-$0.24
MGE DNS	$6.16½	$0.25¼	$5.95½	-$0.10¾	$6.07¾	-$0.13¼	$6.25	-$0.14½
CORN	$4.64¼	-$0.14½	$4.72¼	-$0.13¼	$4.37¼	-$0.08½	$4.74¼	-$0.08½

WHEAT FUTURES—Wheat futures were mostly down this week due to weak exports. **Wheat futures prices ranged down $0.24¼ to up $0.25¼ (per bu) versus the previous week.**

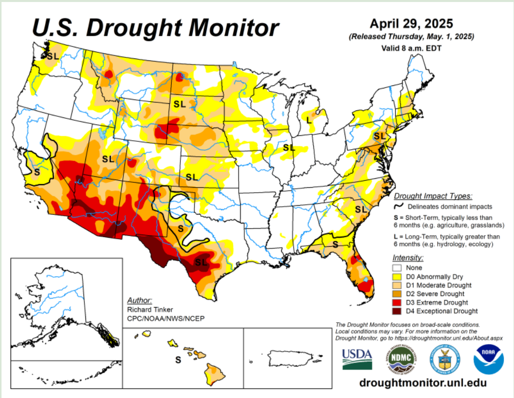
CORN FUTURES—Corn futures were down on weak export demand. **Corn futures prices ranged from down $0.14½ to down $0.08½ (per bu) versus the previous week.**

CRUDE OIL FUTURES— The American Petroleum Institute (API) estimated that crude oil inventories in the United States rose 3.76 million barrels in the week ending April 25, after analysts had estimated a much smaller 390,000-barrel build. The API reported a 4.565 million barrel dip in the prior week. (OilPrice.com)

EIA reported U.S. crude oil refinery inputs averaged 16.1 million bbls day during the week ending April 25, was 189 thousand bbls/day more than last week's average. Refineries operated at 88.6% of capacity last week. As of April 25, there was a decrease in crude oil stocks of 2.696 million bbls from last week to 440.408 million bbls, under the 5-year average of 471.398 million bbls. Distillate stocks increased by 0.937 million bbls to a total of 107.815 million bbls, under the 5-year average of 122.427 million bbls; while gasoline stocks decreased by 4.003 million bbls to 225.540 million bbls, under the 234.636 million bbl 5-year average. The national average retail regular gasoline price was $3.133 per gallon on April 28, down $0.008 from last week's price and down $0.52 from a year ago. The national average retail diesel fuel price was $3.514 per gallon, down $0.02 from last week's price and down $0.433 from last year.

NYMEX Crude Oil Futures finished the week ending Thursday, May 1, 2025 to close at $59.01/bbl (June contract), down $4.01 for the week.

USDA U.S. Drought Monitor—May 1, 2025



Northeast: No significant changes were made in the region this week. Improvemtnts were made in southern Maine and lower New England.

Southeast: Improvements were made in northern Georgia and Alabama. Drought expanded in the southern tier of Georgia, southeastern Alabama, and Florida.

South: Improvements were made in much of the region. Deterioration in Oklahoma.

Midwest: Improvements were made in much of the region.

High Plains: Worsening in Kansas and Colorado. Improvements were made in much of the region.

West: Improvements were made in parts of western Washington, northern Montana. Drought expanded in southwest Washington and northwest Oregon.

USDA U.S. Crop Weather Highlights—May 1, 2025

West: Dry weather favors spring fieldwork. Although generally mild weather prevails, frost was noted this morning in several areas, including eastern Idaho's upper Snake River Plain.

Plains: Dry weather has returned, aside from lingering showers in Montana and the Dakotas. However, major flooding persists from parts of north-central Texas into northeastern Oklahoma, following recent downpours. Notably, Beaver Creek near Waurika, Oklahoma, crested 7.65 feet above flood stage early today, topping the June 2007 highwater mark by 1.54 feet. Elsewhere in Oklahoma, Deep Red Creek near Randlett crested 9.14 feet above flood stage on April 30, second only to the flood (9.58 feet above flood stage) of May 29, 1987.

Corn Belt: Widespread showers are slowing or halting corn and soybean planting efforts, especially in the Great Lakes States. In fact, nearly all areas of the Midwest have received substantial rain over the last week, greatly easing any lingering drought concerns but increasingly limiting opportunities for fieldwork. On April 27, soybean planting was at or ahead of the 5-year average pace in all Midwestern States, led by Iowa and Missouri with 25% seeded.

South: Stubborn dryness in the Atlantic Coast States is promoting spring fieldwork but leading to some early-season stress on pastures and emerging summer crops. In contrast, showers stretch from the Tennessee Valley to the central Gulf coast. Winter wheat is maturing across the Deep South, with 83% headed and 26% coloring in Louisiana by April 27.

Outlook for U.S: Later today, additional showers and thunderstorms in Oklahoma and environs could aggravate flooding in areas already experiencing elevated river levels. Dry weather will briefly return across the southern Plains by week's end, as showers and thunderstorms shift farther to the south and east. The new focus for heavy rain may become the eastern U.S., starting during the weekend. Five-day rainfall totals could reach 2 to 4 inches from the middle Atlantic States into southern New England. During the weekend and early next week, a winter-like storm will traverse the western U.S. before arriving across the central and southern Plains. Western precipitation, including high-elevation snow, will extend unusually far south for this time of year, reaching into the southern Rockies and parts of southern California. Early next week, significant rain should return across the southern Plains. The NWS 6- to 10-day outlook for May 6 – 10 calls for the likelihood of above normal temperatures across the northern two-thirds of the country, while cooler-than-normal conditions will be confined to Florida's peninsula and an area stretching from southern California to the southern High Plains. Meanwhile, near- or above normal precipitation across the Deep South and from the Pacific Coast to the Plains should contrast with drier-than-normal weather in most areas from the middle and upper Mississippi Valley eastward.

International Crop Weather Highlights—Week of April 20-26, 2025

Europe: Widespread showers and thunderstorms improved soil moisture in the north and maintained favorable growing conditions in southern Europe.

Middle East: Showers in Turkey favored reproductive winter grains, while dry and hot weather elsewhere accelerated winter grains toward maturity.

Asia: Showers benefited spring and newly planted summer crops in eastern China but were excessive for winter rapeseed in later stages of development. Drier weather prevailed in Indochina and the Philippines ahead of the main growing season, while showers continued in southern reaches.

Australia: Dry weather in Western Australia contrasted with widespread showers farther east, though drought persisted in South Australia.

Brazil: Widespread showers in the Center-West further benefited second-crop corn.

Argentina: Scattered showers interrupted harvesting of cotton in the far north and soybean and corn in parts of the south.

Western FSU: Unseasonable warmth accelerated winter crop development, while dry weather in Ukraine contrasted with beneficial showers in southern Russia.

Mexico: Spotty showers on the southern plateau corn belt were insufficient for widespread planting to begin, while seasonably dry weather prevailed in drought-stricken northwestern areas.

USDA Crop Progress Report April 28, 2025

Crop	% Progress	Previous Week	Previous Year	5-Year Average	Condition Rating % Good/ Excellent	Previous Week	Previous Year
US Winter Wheat Headed	27%	15%	28%	22%	49%	45%	49
ID Winter Wheat Headed	**-**	**-**	**-**	**-**	**-**	**-**	**-**
US Spring Wheat Planted	30%	17%	31%	21%	-	-	-
ID Spring Wheat Planted	**71%**	**54%**	**70%**	**57%**	**-**	**-**	-
US Spring Emerged	5%	2%	5%	5%			
ID Spring Emerged	**28%**	**15%**	**27%**	**20%**			
US Barley Planted	37%	26%	33%	29%	-	-	-
ID Barley Planted	**67%**	**52%**	**63%**	**56%**	**-**	**-**	**-**
US Barley Emerged	9%	3%	5%	7%			
ID Barley Emerged	**26%**	**13%**	**21%**	**21%**			
US Corn Planted	24%	12%	25%	22%	-	-	-
US Corn Emerged	5%	2%	2%	6%			

USDA/NASS National Crop Progress Summary April 21-27, 2025

Wheat: By April 27, twenty-seven percent of the nation’s winter wheat crop was headed, 1 percentage point behind last year but 5 points ahead of the 5-year average. On April 27, forty-nine percent of the 2025 winter wheat crop was reported in good to excellent condition, 4 percentage points above the previous week but equal to last year. In Kansas, the largest winter wheat-producing state, 47 percent of the winter wheat crop was rated in good to excellent condition.

By April 27, thirty percent of the spring wheat crop was seeded, 1 percentage point behind last year but 9 points ahead of the 5- year average. Progress was furthest advanced in South Dakota and Washington, both with 79 percent planted. By April 27, five percent of the nation’s spring wheat crop had emerged, equal to both the previous year and the 5-year average.

Small Grains: Nationally, oat producers had seeded 61 percent of this year’s acreage by April 27, the same as last year but 8 percentage points ahead of the 5-year average. Thirty-seven percent of the nation’s oat acreage had emerged by April 27, four percentage points behind the previous year but 2 points ahead of average. .

Thirty-seven percent of the nation’s barley crop was planted by April 27, four percentage points ahead of last year and 8 points ahead of the 5-year average. Progress was furthest advanced in Washington and Idaho, with 68 and 67 percent planted, respectively. Nine percent of the nation’s barley crop had emerged by April 27, four percentage points ahead of the previous year and 2 points ahead of average.

Corn: By April 27, producers had planted 24 percent of the nation’s corn crop, 1 percentage point behind last year but 2 points ahead of the 5-year average. Texas was the furthest advanced with 74 percent planted, 3 percentage points ahead of last year and 4 points ahead of average. Five percent of the nation’s corn acreage had emerged by April 27, one percentage point behind the previous year but 1 point ahead of average.