Idaho Grain Market Report, July 17, 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 July 16, 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						
Colfax, WA						
Michaud						
Grace / Soda Springs						
Twin Falls / Buhl Jerome / Wendell	8.60		4.81			
Meridian	8.50		5.15	4.72	5.85	
Nezperce / Craigmont Does not include delivery			6.15	5.82		
Lewiston Does not include delivery			6.15	5.82		
Moscow / Genesee Does not include delivery	8.50		6.10-6.15	5.82-5.83	6.64	

Prices at Selected Terminal Markets, cash FOB

Wednesday July 16, 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			6.10-6.15	5.83	6.65	
Ogden						
Great Falls				4.58-4.75	5.62-5.70	
Minneapolis					7.75	

Market News and Trends This Week

BARLEY—Idaho cash feed barley prices were unchanged for the week ending July 16. Idaho cash malt barley prices were unchanged. Total net sales of 1,000 MT for 2025/2026 were for Canada. Exports of 2,200 MT were to Canada (1,900 MT) and Japan (300 MT).

Barley News— As old crop winds down and buyers wait for new crop to come off the fields, feed grain prices are coming down, said a Saskatchewan-based trader. Evan Peterson of JGL Commodities in Moose Jaw attributed the declines to seasonal pressure amidst mid-summer lack of demand. "Lethbridge is trading for C$295 to C$300 (per tonne)," Peterson said about current feed barley prices. He added that some feedlots are transitioning away from barley and more towards corn, taking advantage of historically low United States futures prices for the latter. "Futures started to pull back with the anticipation of a larger U.S. corn crop. So we've seen corn traded in southern Alberta for old crop. It also puts pressure on barley prices as well," Peterson said. Right now, buyers are waiting and seeing how the upcoming barley crop will turn out, Peterson said, before determining whether to purchase barley or corn. But demand for feed grain has also slowed down. "Cattle numbers have diminished across the Prairies and in southern Alberta. The demand for grain in the summer did not seem to be there as it had been in the past," he said. Downward pressure on barley and corn prices should continue as growers get closer to harvest. "(Feed grain prices will) probably be on a slow, downward, sideways trend into new crop to see how things shape out after the combines start rolling," Peterson said. Delivered feed barley prices in Saskatchewan ranged from C$5.25 to C$5.51 per bushel on July 9, down 29 cents from a month earlier, Prairie Ag Hotwire reported. Prices in Alberta were from C$5.29 to C$6.64, down 33 cents. Those in Manitoba ranged from C$5.04 to C$5.35 and were steady from one month ago. (CandianCattleman.com)

Market News and Trends This Week—continued

Idaho cash wheat prices were mixed for the week ending July 16. SWW prices ranged from down $0.25 to up $0.25 from the previous week; HRW prices were unchanged to up $0.08; DNS prices were down $0.32 to unchanged. HWW prices were not given. USDA FAS reported net sales of 494,400 MT for 2025/2026 for the period July 4-10 were primarily to the Mexico (83,500 MT) Venezuela (71,600 MT), South Africa (51,800 MT), Japan (49,100 MT), and Peru (47,000 MT), Exports of 432,900 MT were down 3 percent from the previous week, but up 7 percent from the prior 4-week average. The destinations were primarily to Mexico (153,700 MT), the Philippines (66,000 MT), South Africa (51,800 MT), South Korea (51,000 MT), and Japan (35,100 MT).

Wheat News- Indonesia's flour milling association, APTINDO, has committed to doubling its annual purchases of U.S. wheat to 1 million metric tons each year for the next five years. U.S. Wheat Associates, the overseas marketing arm for the industry, announced the July 7 signing of a memorandum of understanding with APTINDO. "The commitment of the Indonesian milling industry to purchase U.S. wheat reflects this increased focus by the Indonesian government to improve the trade balance with the United States," U.S. Wheat president and CEO Mike Spier said in a statement. "The collaboration between the U.S. wheat industry and APTINDO reflects our shared commitment to delivering high-quality U.S. wheat and supporting continued growth in Indonesia's milling sector.""By increasing our purchases of U.S. wheat, Indonesian millers are not only securing a vital, high-quality agricultural commodity for our growing market, but also actively contributing to the shared goal of a more balanced trade relationship between our two nations," APTINDO chairman Franciscus Welirang said in a statement. Indonesia is one of the largest wheat importers in the world, but the market is highly competitive, U.S. Wheat said in a newsletter. Indonesian wheat consumption for food use has increased by 22% over the past decade. Rapid growth in demand for wheat foods is expected to continue, including higher-quality products favoring flour from U.S. wheat classes. Indonesia has imported an average of 500,000 metric tons from the U.S. over the last five marketing years. Capitalpress.com)

CORN—USDA FAS reported net sales for 2024/2025 for period July 4-10 were 97,600 MT, were to Japan (187,900 MT), Colombia (78,600 MT), South Korea (77,100 MT), the United Kingdom (44,000 MT), and Egypt (33,100 MT). Net sales of 888,600 MT for 2025/2026 were primarily for Mexico (423,900 MT), Japan (304,800 MT), unknown destinations (112,400 MT), El Salvador (37,000 MT), and Nicaragua (6,500 MT). Exports of 1,210,700 MT were down 28 percent from the previous week and 24 percent from the prior 4-week average. The destinations were primarily to Japan (299,900 MT), Mexico (280,200 MT), South Korea (271,800 MT), Colombia (111,000 MT), and Taiwan (76,100 MT).

Ethanol Corn Usage—DOE's Energy Infor. Agency (EIA) reported ethanol production for the week July 11 was 1.087 million bbls/day up 0.2 percent from the previous week and down 1.7 percent from last year. Total ethanol production for the week was 7.609 million barrels. Ethanol stocks were 23.635 million bbls, down 1.4 percent from last week and up 2.1 percent from last year. An estimated 109.67 million bu of corn was used in last week's production bringing this crop year's cumulative corn usage for ethanol production at 4.849 billion bu. Corn used needs to average 89.29 million bu per week to meet USDA estimate of 5.500 billions bu for the crop year.

Futures Market News and Trends—Week Ending July 17, 2025

FUTURES MARKET SETTLEMENT PRICES for the Week Ending Thursday, July 17, 2025:

Commodity	Sept 2025	Week Change	Dec 2025	Week Change	March 2026	Week Change	May 2026	Week Change
CHI SRW	$5.33½	-$0.11½	$5.54¼	-$0.11¼	$5.72½	-$0.11¼	$5.83½	-$0.10¾
KC HRW	$5.17½	-$0.06¾	$5.40	-$0.08¼	$5.61¼	-$0.09	$5.75	-$0.09
MGE DNS	$5.95	-$0.18¾	$6.15¾	-$0.17¾	$6.34¼	-$0.16	$6.45¾	-$0.12¾
CORN	$4.02	$0.06	$4.21	$0.08¾	$4.38¼	$0.09¼	$4.48½	$0.08¾

WHEAT FUTURES—Wheat futures were down due to good weather conditions in growing areas. **Wheat futures prices ranged from down $0.18¾ to down $0.06¾ (per bu) versus the previous week.**

CORN FUTURES—Corn futures were up due strong export numbers. **Corn futures prices ranged from up $0.06 to up $0.09¼ (per bu) versus the previous week.**

CRUDE OIL FUTURES—Oil prices settled marginally lower on Wednesday as U.S. fuel inventory builds and concerns about wider economic impact from U.S. tariffs outweighed some signs of increasing demand. (Reuters)

EIA reported U.S. crude oil refinery inputs averaged 16.8 million bbls day during the week ending July 11, was 158 thousand bbls/day more than last week's average. Refineries operated at 93.9% of capacity last week. As of July 11, there was a decrease in crude oil stocks of 3.859 million bbls from last week to 422.162 million bbls, under the 5-year average of 458.708 million bbls. Distillate stocks increased by 4.173 million bbls to a total of 106.970 million bbls, under the 5-year average of 135.585 million bbls; while gasoline stocks increased by 3.399 million bbls to 232.867 million bbls, under the 232.977 million bbl 5-year average. The national average retail regular gasoline price was $3.130 per gallon on July 14, up $0.005 from last week's price but down $0.366 from a year ago. The national average retail diesel fuel price was $3.758 per gallon, up $0.019 from last week's price and down $0.068 from last year.

NYMEX Crude Oil Futures finished the week ending Thursday, July 17, 2025 to close at $67.63/bbl (August contract), down $0.85 for the week.

USDA U.S. Drought Monitor—July 17, 2025

Northeast: Improvements were made in the region.

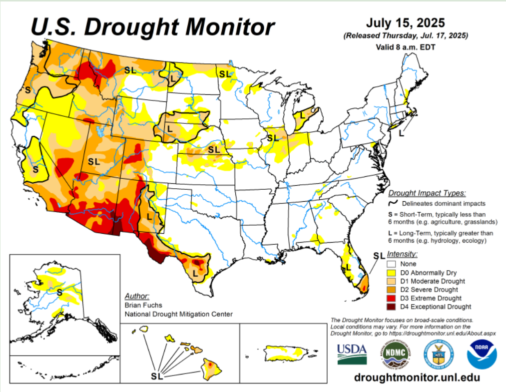
Southeast: Degradations were made in the region.

South: Improvements were made in much of the region.

Midwest: Improvements were made in much of the region.

High Plains: Improvements were made in much of the region.

West: Degradations were made in much of the region this week.



USDA U.S. Crop Weather Highlights—July 17, 2025

West: The interaction between a cold front and the monsoon circulation is resulting in some rain in the Four Corners States. Elsewhere, dry weather accompanies near- or above-normal temperatures. Air-quality alerts due to wildfire smoke are in effect in several areas from the Northwest into western Colorado. The Cram Fire near Madras, Oregon, has burned more than 64,000 acres of vegetation, while the White Sage Fire in northern Arizona has scorched nearly 59,000 acres.

Plains: Lingering heat is mostly limited to Oklahoma and Texas. Meanwhile, thundershowers associated with a cold front draped across the central Plains are slowing fieldwork but benefiting rangeland, pastures, and summer crops. Finally, cool, dry weather prevails on the northern Plains, following recent, drought-easing rainfall.

Corn Belt: Cool air has settled across the northwestern half of the region in the wake of a cold front's passage. This morning's minimum temperatures fell below 45°F in the Red River Valley of the North. Elsewhere, rainfall in the vicinity of the front is heaviest in Missouri, while hot, humid weather lingers in the Ohio Valley. By July 13, fifteen percent of the nation's soybeans were setting pods, mostly under favorable conditions, slightly ahead of the 5-year average of 14%.

South: Heavy rain continues in parts of southern Louisiana, although odds of tropical cyclone formation are decreasing. The remainder of the region is experiencing hot, humid weather, along with widely scattered showers. Today's high temperatures should range from 90 to 100°F, with the hottest weather focused across the mid-South.

Outlook for U.S: A poorly organized low-pressure system near the central Gulf Coast is expected to move inland later today, with locally heavy rain totaling an additional 2 to 4 inches or more in southern Louisiana and environs. Meanwhile, a weakening cold front extending eastward from the central Plains will remain the focus of scattered showers. The front will also serve as the boundary between hot, humid conditions in the South and rather cool conditions across the northern half of the Plains and much of the Midwest. Five-day rainfall totals in the vicinity of the front could reach 1 to 3 inches, with locally higher amounts. In contrast, hot, mostly dry weather will prevail in the south-central U.S., including the flood-recovery areas of Texas. Elsewhere, thundershowers associated with the North American monsoon circulation will be scattered across the West, excluding the Pacific Coast States and the northern Rockies. At the same time, heat will gradually ease across the West but further intensify from the central and southern Plains into the Southeast. The NWS 6- to 10-day outlook for July 22 – 26 calls for the likelihood of above-normal temperatures from the central and southern Rockies to the Atlantic Coast, excluding Maine, while cooler-than-normal conditions will cover California, the Great Basin, the Northwest, and the northern High Plains. Meanwhile, near- or below-normal rainfall across much of the southern half of the U.S. should contrast with wetter than normal weather in the North and lower Southeast, including the Florida.

International Crop Weather Highlights—Week of July 6-12, 2025

Europe: Much cooler weather accompanied by widespread rain ended the early-July heat wave and provided timely improvements to summer crop yield prospects.

Middle East: Hot and dry weather in Turkey promoted winter grain harvesting but hastened the development of reproductive summer crops.

Asia: Monsoon showers aided kharif crop establishment across India and eased dryness in Pakistan. Typhoon Danas brought extremely heavy rain to Taiwan and southeastern China, causing localized flooding. Monsoon rainfall continued to benefit main-season rice across northern portions of the region

Australia: :Showers in southwestern and southern Australia eased dryness and improved soil moisture for vegetative winter crops, while mostly dry weather over southeastern croplands maintained drought concerns.

Western FSU: Blistering heat developed across Russia and eastern Ukraine, hastening corn and sunflowers toward or into reproduction while lowering summer crop yield prospects.

Mexico: Widespread showers maintained favorable growing conditions for summer crops on the southern plateau corn belt.

USDA Crop Progress Report July 14, 2025

Crop	% Progress	Previous Week	Previous Year	5-Year Average	Condition Rating % Good/ Excellent	Previous Week	Previous Year
US Winter Wheat Harvested	63%	53%	70%	64%			
ID Winter Wheat Harvested	**4%**	**2%**	**3%**	**4%**			
US Spring Wheat Headed	78%	61%	74%	75%	54%	50%	77%
ID Spring Wheat Headed	**95%**	**83%**	**80%**	**86%**	**61%**	**60%**	
US Barley Headed	68%	54%	73%	74%	45%	42%	74%
ID Barley Headed	**95%**	**83%**	**76%**	**82%**	**74%**	**75%**	
US Corn Silking	34%	18%	39%	33%	74%	74%	68%
US Corn Silking	7%	3%	7%	5%	74%	74%	68%

USDA/NASS National Crop Progress Summary July 7-13, 2025

Winter Wheat: Sixty-three percent of the nation's winter wheat acreage had been harvested by July 13, seven percentage points behind last year and 1 point behind the 5- year average. Producers in Arkansas had completed harvesting the 2025 winter wheat acreage by the week's end. In contrast, harvest progress in Nebraska and Texas lagged 8 and 7 percentage points, respectively, behind the 5-year average pace.

Seventy-eight percent of the nation's spring wheat was headed by July 13, four percentage points ahead of last year and 3 points ahead of the 5-year average. On July 13, fifty-four percent of the spring wheat was rated in good to excellent condition, 4 percentage points above the previous week.

Small Grains: By July 13, sixty-eight percent of the nation's barley crop had headed, 5 percentage points behind last year and 6 points behind the 5-year average. On July 13, fortyfour percent of the nation's barley crop was rated in good to excellent condition, 2 percentage points above last week.

Corn: Thirty-four percent of the nation's corn crop had reached the silking stage by July 13, five percentage points behind last year but 1 point ahead of the 5-year average. Seven percent of the corn was at the dough stage by week's end, equal to last year but 2 percentage points ahead of average. On July 13, seventy-four percent of the nation's corn was rated in good to excellent condition, unchanged from the previous week. In Iowa, the largest corn-producing state, 85 percent of the corn was rated in good to excellent condition.

USDA/NASS National Crop Progress Summary July 11, 2025

WHEAT: The outlook for 2025/26 U.S. wheat this month is for increased supplies, unchanged domestic use, higher exports, and lower ending stocks. Supplies are raised as wheat production is projected at 1,929 million bushels, up 8 million from last month on higher yields more than offsetting reduced harvested area. The all wheat yield is 52.6 bushels per acre, up 1.0 bushel from last month. Winter wheat production is lowered 36 million bushels to 1,345 million with reductions in Hard Red Winter and Soft Red Winter. The initial 2025/26 survey-based production forecasts from NASS indicate that other spring wheat is less than last year at 504 million bushels on lower harvested area and yields while Durum is slightly lower at 80 million on reduced yields. Exports are raised by 25 million bushels to 850 million on a strong early pace of sales and shipments. Projected 2025/26 ending stocks are lowered 8 million bushels to 890 million but are up 5 percent from last year. The projected 2025/26 season-average farm price (SAFP) is unchanged at $5.40 per bushel, down from last year's final SAFP of $5.52.

COARSE GRAINS: Barley production is up fractionally as slightly higher area in the Acreage report more than offsets a decline in yield to 77.1 bushels per acre in today's Crop Production report. Oats production is raised 14 million bushels reflecting higher area and an increase in yield to 75.5 bushels per acre. Sorghum production is reduced 25 million bushels based on the lower area reported in the Acreage report.

BARLEY: The July WASDE report shows the outlook for 2025/2026 U.S. barley supplies were up at 226 million bushels from the projected estimates at 223 million bushels. The July report estimates a projected yield of 77.1 bushels/acre with 1.9 million acres expected to be harvested, unchanged from the June 2024/2025 estimates report. Projected use is at an estimated 150 million bushels, and projected imports at 9 million bushels. Ending stocks for 2025/2026 are projected to be 76 million bushels. The season-average farm price is down at $5.30 bu on updated NASS prices compared to $5.30/bu in June 2024/2025 estimates.