Idaho Grain Market Report, August 28, 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 August 27, 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						
Idaho Falls/Idaho Falls						
Eden						
Grace / Soda Springs	7.50		4.85	4.65	5.70	5.06
Twin Falls / Buhl Jerome / Wendell	8.20		4.65			
Meridian	8.50		5.05	4.73	5.31	
Nezperce / Craigmont Does not include delivery	8.00		6.05	5.55		
Lewiston Does not include delivery	8.00		6.05	5.55		
Moscow / Genesee Does not include delivery	8.00-8.50		6.05	5.55-5.83	6.47	

Prices at Selected Terminal Markets, cash FOB
Wednesday August 27, 2025 Barley prices in $/Cwt. And wheat prices in $/bu.

	#2 Feed Barley 46 lbs. --	Malting Barley	#1 SWW	#1 HRW 12% Pro-tein	#1 DNS 13% Protein	#1 HWW
Portland			6.05-6.10	5.67-5.82	6.48-6.53	
Ogden			4.91	5.35	6.40	5.55
Great Falls				4.13-4.45	5.13-5.36	
Minneapolis					6.81	

Market News and Trends This Week

BARLEY—Idaho cash feed barley prices were unchanged to up $0.20 for the week ending August 27. Idaho cash malt barley prices were unchanged. Net sales of 400 MT for 2025/2026 reported for Canada. Exports of 1,000 to Canada (700 MT) and Japan (300 MT) were reported for the week.

Barley News—Trade associations The Brewers of Europe and the Distilled Spirits Council of the US (Discus) have voiced concern following the EU-US joint statement last week, which did not secure tariff-free trade terms for their respective industries. Beer exports from the European Union to the US remain subject to a 15% tariff, with canned products facing an additional 50% aluminum derivatives duty. The Brewers of Europe said the “double blow” is weighing heavily on brewers, farmers and supply chain partners, adding that a zero-for-zero tariff deal would stimulate investment and increase consumer choice. “Beer has long been a cornerstone of EU-US trade, built on a unique ecosystem of collaboration,” said secretary-general Julia Leferman. “Restoring fair and reciprocal trade terms would allow the transatlantic beer market to flourish once more – to the benefit of farmers, brewers, distributors, hospitality workers and consumers in both Europe and the US.” In a separate statement, Discus CEO Chris Swonger welcomed US efforts to protect domestic manufacturing jobs but warned that the absence of permanent tariff-free trade leaves the country’s distillers exposed to the risk of retaliatory duties returning. “We commend the administration for safeguarding US spirits from tariffs in the short term, but without a permanent return to zero-for-zero tariffs on spirits, American distillers do not have the certainty to plan for future export and job growth,” Swonger said. “These new, higher tariffs on EU spirits products will further compound the challenges facing restaurants and bars nationwide.” Both organizations said they remain committed to working with policy-makers to secure a durable zero-for-zero tariff agreement covering beer and spirits. Earlier this month, Gallup’s recent report showing alcohol consumption at an 86-year low in the US prompted a raft of reactions from within the country’s alcohol industry, including the CEO of The Brewers Association in the US.(drinks-intel.com)

Market News and Trends This Week—continued

Idaho cash wheat prices were mixed for the week ending August 27. SWW prices ranged from down $0.06 to unchanged from the previous week; HRW prices were down $0.11 to up $0.08; DNS prices were unchanged to up $0.04. HWW prices were not given. USDA FAS reported net sales of 579,800 MT for 2025/2026 for the period August 15-21 were primarily to the Vietnam (156800 MT), Nigeria (106,000 MT), Mexico (94,200 MT), Taiwan (90,100 MT), and Japan (59,000 MT), Exports of 1,005,600 MT a marketing-year high--were up noticeably from the previous week and from the prior 4-week average, were primarily to Indonesia (149,900 MT), the Philippines (146,400 MT), South Korea (143,000 MT), Mexico (112,000 MT), and Vietnam (91,800 MT).

Wheat News— Warm weather means very few low falling number hot spots reported this year. "I have heard we have maybe one or two hot spots that are small and regional, but down from last year, and last year was a good year, too," said Amber Hauvermale, falling number project leader and a Washington State University associate professor. A falling number test measures the amount of pre-harvest sprouting and alpha-amylase, an enzyme that breaks down starch. The starch damage impacts the baking characteristics of the wheat, harming the final product. Hauvermale attributes the low amount of incidents this year to warmer weather at the end of July. Farmers are seeing the effect if their grain had some issues, she said. "A lot of management can happen in the field prior to harvest by allowing the grain to sit just a little bit longer," she said. The industry was caught off-guard by "staggering" starch damage losses in 2016. Falling number is estimated to have cost farmers $140 million that year. Hauvermale isn't aware of any farmers receiving a reduced price this year. "It's maybe an isolated lot or field," she said. "There's so much good grain this year that it's very easy to have it blended away. The overall health of the grain this year is looking really good."Hauvermale and colleague Alison Thompson, USDA research biologist at the USDA, are working with WSU, Oregon State University and commercial variety development programs to conduct early testing. In spots where checks "flag hot," they'll screen the entire location. "It's giving us kind of a streamlined way to look at falling numbers on a much larger footprint," Hauvermale said. It allows researchers to report earlier those varieties that might have problems to seed representatives and breeders, before they are released, she said. (capitalpress.com)

CORN—USDA FAS reported net reductions of 17,800 MT for 2024/2025. Net sales of 2,089,700 MT for 2025/2026 primarily for Mexico (620,700 MT), unknown destinations (515,200 MT), Colombia (257,000 MT), Spain (208,000 MT), and Vietnam (143,500 MT). Exports of 1,149,000 MT were up 12 percent from the previous week, but down 13 percent from the prior 4-week average. The destinations were primarily to Mexico (427,300 MT), Japan (364,100 MT), Saudi Arabia (67,500 MT), Israel (59,700 MT), and Honduras (56,000 MT).

Ethanol Corn Usage—DOE's Energy Infor. Agency (EIA) reported ethanol production for the week August 22 was 1.070 bbls/day down 0.2 percent from the previous week and down 0.1 percent from last year. Total ethanol production for the week was 7.490 million barrels. Ethanol stocks were 22.549 million bbls, down 0.6 percent from last week and down 4.3 percent from last year. An estimated 107.95 million bu of corn was used in last week's production bringing this crop year's cumulative corn usage for ethanol production at 5.504 billion bu. Corn used needs to average 26.64 million bu per week to meet USDA estimate of 5.470 billions bu for the crop year.

Futures Market News and Trends—Week Ending August 28, 2025

FUTURES MARKET SETTLEMENT PRICES for the Week Ending Thursday, August 28, 2025:

Commodity	Sept 2025	Week Change	Dec 2025	Week Change	March 2026	Week Change	May 2026	Week Change
CHI SRW	$5.04¾	$0.05½	$5.29	$0.01¾	$5.46	$0.01¼	$5.57	$0.01
KC HRW	$4.86¾	-$0.11¼	$5.15¾	-$0.05¼	$5.36	-$0.03½	$5.49½	-$0.02½
MGE DNS	$5.55¼	-$0.14¼	$5.77¼	-$0.12¾	$5.98¾	-$0.09¾	$6.12½	-$0.09
CORN	$3.85½	-$0.02¾	$4.10	-$0.01½	$4.27½	-$0.02¾	$4.37¾	-$0.01

WHEAT FUTURES—Wheat futures were mixed due to ample global supplies and strong export sales. **Wheat futures prices ranged from down $0.14¼ to up $0.05½ (per bu) versus the previous week.**

CORN FUTURES—Corn futures were down due to record U.S crop expectations. **Corn futures prices ranged from dwon $0.02¾ to down $0.01 (per bu) versus the previous week.**

CRUDE OIL FUTURES—Oil prices settled higher on Wednesday after data showed a larger-than-expected drop in U.S. crude inventories and as investors weighed the potential impact from new U.S. tariffs on India. (Reuters)

EIA reported U.S. crude oil refinery inputs averaged 16.9 million bbls day during the week ending August 22, was 328 thousand bbls/day less than last week's average. Refineries operated at 94.6% of capacity last week. As of August 22, there was a decrease in crude oil stocks of 2.392 million bbls from last week to 418.292 million bbls, under the 5-year average of 441.360 million bbls. Distillate stocks decreased by 1.786 million bbls to a total of 114.242 million bbls, under the 5-year average of 134.074 million bbls; while gasoline stocks decreased by 1.236 million bbls to 222.334 million bbls, under the 223.077 million bbl 5-year average. The national average retail regular gasoline price was $3.147 per gallon on August 25, up $0.022 from last week's price and down $0.166 from a year ago. The national average retail diesel fuel price was $3.708 per gallon, down $0.005 from last week's price and up $0.057 from last year.

NYMEX Crude Oil Futures finished the week ending Thursday, August 28, 2025 to close at $63.41/bbl (October contract), up $0.64 for the week.

USDA U.S. Drought Monitor—August 28, 2025

Northeast: Improvements conditions in most of the region. Worsening conditions were made in northern New England and northern New York.

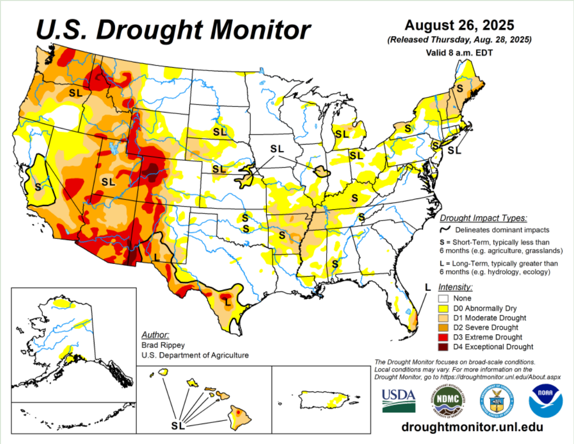
Southeast: Improvements were made in much of the region.

South: Drought expanded in Arkansas, Tennessee, and Mississippi. Improvements improved in the rest of the region.

Midwest: Worsening conditions from Missouri into the Ohio Valley and lower Great Lakes region.

High Plains: Improvements were made in Kansas, Nebraska, and Sough Dakota

West: No significant changes were made in the region.



USDA U.S. Crop Weather Highlights—August 28, 2025

West: Most areas are experiencing a return of dry weather, although scattered showers stretch from Washington to western Montana. This week's Western showers have aided containment of wildfires, which nationally have burned more than 4.1 million acres of vegetation so far this year, compared with the 10-year average of 5.2 million acres.

Plains: Heavy rain across southern Kansas and northern Oklahoma is resulting in local flooding. Meanwhile, very warm, mostly dry weather prevails in Texas and across the northern Plains, aside from a few showers in Montana. The U.S. spring wheat harvest recently passed the halfway mark and was 53% complete by August 24.

Corn Belt: Isolated showers are affecting the lower Great Lakes region. Elsewhere in the Corn Belt, sunny but cool weather is pushing summer crops toward maturity. In fact, 7 % of the U.S. corn crop was fully mature by August 24; the only Midwestern State on that date with double-digit corn maturity was Missouri, at 15%.

South: Scattered showers are occurring along an axis stretching from Arkansas to the southern Atlantic Coast. Especially in the mid-South, rain is falling in areas that have experienced drought development in recent weeks. Elsewhere, cool, dry weather prevails from the Tennessee Valley eastward, while hot, dry weather favors fieldwork, including rice harvesting, in the western Gulf Coast region.

Outlook for U.S: Cooler-than-normal conditions will continue through Labor Day weekend in much of the central and eastern U.S., while building heat will accompany the return of mostly dry weather in the West. An exception to the Western dryness will be the possibility of heavy showers in the central and southern Rockies, starting Friday afternoon. Farther east, rain will continue to fall, heavily at times, near the boundary between cool air to the north and lingering heat in the Deep South. Five-day rainfall totals could reach 2 to 4 inches or more from the southern half of the Plains to Florida. Farther north, however, little or no rain will fall in the upper Great Lakes region and from the Ohio Valley into the middle Atlantic States. The NWS 6- to 10-day outlook for September 2 – 6 calls for the likelihood of below-normal temperatures in the central and eastern U.S., aside from warmer-than-normal weather in northern Maine, peninsular Florida, and the western Gulf Coast region. Conversely, late summer warmth will dominate the West, except in the central and southern Rockies. Meanwhile, near- or above-normal precipitation across most of the country should contrast with drier-than-normal conditions in parts of the Pacific Northwest..

International Crop Weather Highlights—Week of August 17-23, 2025

Europe: Cooler weather spread across Europe, accompanied by widespread showers over central and southeastern growing areas.

Middle East: Seasonably hot and dry conditions in Turkey accelerated summer crops into maturity and promoted early harvesting efforts.

Asia: Widespread monsoon rains continued to drench the region, bringing much-needed rainfall to southern Pakistan, which had endured a long period of dry weather.

Australia: Showers in southwestern and east-central growing areas contrasted with dry but chilly weather in southeastern Australia.

Western FSU: Chilly and unsettled weather in the north and west gave way to persistent dryness and heat adjacent to the Black Sea Coast.

Mexico: On the southern plateau corn belt, most summer crops retained adequate soil moisture for normal development, despite less-widespread showers.

Southern Canada: Rain in Ontario benefited pastures and a variety of summer crops, including corn.

USDA Crop Progress Report August 25, 2025

Crop	% Progress	Previous Week	Previous Year	5-Year Average	Condition Rating % Good/ Excellent	Previous Week	Previous Year
US Winter Wheat Harvested	96%	94%	99%	98%			
ID Winter Wheat Harvested	**92%**	**72%**	**87%**	**80%**			
US Spring Wheat Harvested	53%	36%	48%	54%	49%	51%	69%
ID Spring Wheat Harvested	**65%**	**45%**	**40%**	**49%**	**43%**	**43%**	
US Barley Harvested	56%	37%	45%	57%	42%	44%	65%
ID Barley Harvested	**70%**	**50%**	**49%**	**55%**	**69%**	**67%**	
US Corn Dough	83%	72%	83%	84%	71%	71%	65%
US Corn Dented	44%	27%	44%	44%	71%	71%	65%
US Corn Mature	7%	3%	10%	7%	71%	71%	65%

USDA/NASS National Crop Progress Summary August 18—24, 2025

Winter Wheat: Ninety-eight percent of the nation's winter wheat acreage had been harvested by August 24, one percentage point behind last year but equal to the 5- year average. Harvest of the winter wheat crop was at or beyond 95 percent in 16 of the 18 estimating states by week's end.

Fifty-three percent of the nation's spring wheat acreage had been harvested by August 24, five percentage points ahead of last year but 1 point behind the 5-year average. On August 24, forty-nine percent of the spring wheat was rated in good to excellent condition, 1 percentage point below the previous week.

Barley: Fifty-six percent of the barley acreage had been harvested by August 24, eleven percentage points ahead of last year but 1 point behind the 5-year average. On August 24, forty two percent of the barley was rated in good to excellent condition, 2 percentage points below the previous week.

Corn: Eighty-three percent of the nation's corn was at the dough stage by August 24, equal to last year but 1 percentage point behind the 5-year average. By August 24, forty-four percent of the corn had reached the dented stage, equal to both last year and the average. Seven percent of the corn was mature by week's end, 3 percentage points behind last year but equal to the average. On August 24, seventy-one percent of the corn was rated in good to excellent condition, unchanged from the previous week. In Iowa, the largest corn-producing state, 84 percent of the corn was rated in good to excellent condition.

NOAA Three Month Outlook Sept-Oct-Nov August 21, 2025