

Dakota GOLD



Wheat Check-off Moving to Two Cents per Bushel on July 1

The check-off assessment level for wheat will move to two cents per bushel on July 1, 2025. This is an increase from the current level of one and one-half cents, which has been the level since 2005. The legislation regarding the increase in the check-off was Senate Bill 2161, and it also included a check-off increase for barley. Sponsors of the legislation included Senator Kessel, Representative Brandenburg, Representative Kempenich, Senator Wanzek and Senator Weber. It passed both chambers of the 69th Legislative Assembly with near unanimous support.



The Board of the North Dakota Wheat Commission had been discussing the need for an increase in the check-off since early 2023, due to inflationary pressures on core program areas, and the need to fund expanding research needs for wheat, as well as both international and domestic market development needs. This was a well vetted decision, as making diligent use of the state's wheat producer's investment

through the check-off has always been a priority for the Board. The fact that the NDWC has been able to fund programs at the current check-off level for 20 years reflects conservative budget approaches over the years. Increasing wheat yields have also helped to offset lower wheat acres compared to 20 years ago. On a 50 bushel wheat yield, the additional check-off investment amounts to \$0.25/acre. NDWC Chairman Jim Pellman of McClusky says that, "We as wheat producers need to invest in our own industry to build the best future. We need to maintain wheat's position as one of the leading crops in the state, and the enviable reputation of North Dakota wheat on the world market as one that is considered premium value by customers. It has brought significant economic benefit to both producers and the larger state economy over the years, and we are optimistic about its future, if we are in a position to address the emerging challenges."

con't on pg 2



2025 NDSU Research Extension Center Annual Field Days

The North Dakota State University Research Extension Centers' annual field days are set. The events take place at the Research Extension Center sites across the state and feature speakers, presentations and tours covering a diverse array of topics. The field days are open to the public, and they provide a great opportunity for farmers, ranchers and others to learn about the latest research and practices in animal science, agronomy and horticulture. Listed below are the dates for this year's events.

Central Grasslands	July 14 am
Hettinger	July 15 pm
Dickinson, Ranch tour	July 16 am
Williston, Dryland	July 16 pm
Williston, Irrigated	July 17 am
Dickinson, Agronomy/Horticulture	July 17 pm
Agronomy Seed Farm	July 21 pm
Carrington	July 22 all day
North Central	July 23 pm
Langdon	July 24 am
Oakes	Aug 7 am

All field dates listed: <https://www.ndsu.edu/agriculture/ag-research/ndsu-field-days>



The North Dakota Wheat Commission (NDWC) works to improve the economic well-being of North Dakota through export market development, domestic promotion, research, policy and public information initiatives. Wheat producers fund the effort with a checkoff of a penny and a half per bushel.

- DON HARDYDIST 1

3860 170th Ave SW | Beach, ND 58621

701.218.0400
- DUSTIN JOHNSRUDDIST 2

6121 125th Ave NW | Epping, ND 58843

701.859.6155
- JIM PELLMANDIST 3

PO Box 314 | McClusky, ND 58463

701.220.1460
- GLENDON SLAUBAUGHDIST 4

7281 42nd Ave NE | Rugby, ND 58368

701.583.2338
- SCOTT HUSODIST 5

11931 County Road 2 | Aneta, ND 58212

701.789.9800
- AARON KJELLANDDIST 6

12859 66th St NE | Park River, ND 58270

701.331.0574
- MARK BIRDSALLCOMM-AT-LARGE

PO Box 193 | Berthold, ND 58718

701.240.9507
- Neal Fisher..... Administrator

Jim Peterson..... Policy & Marketing Director

Erica Olson Market Development & Research Manager

Keri Ell Accounting Specialist

Jolene Beehler Administrative Assistant



Dakota Gold is published by the
North Dakota Wheat Commission
2401 46th Avenue SE, Suite 104
Mandan, ND 58554-4829

Phone: 701.328.5111
Email: ndwheat@ndwheat.com
Website: www.ndwheat.com

Wheat Check-off can't from pg 1

The formal decision to pursue a check-off increase was made just prior to this past Legislative Session, after seeking input and support from the producer elected county representatives across the state, and producer organizations that represent wheat and durum. There was overwhelming support based on the expanding research needs in wheat, such as wheat stem sawfly, low pH soils, ongoing disease and pest issues; and ensuring our public wheat breeding programs have the resources to enhance genetic selection, screening processes, and variety testing plots, just to name a few. It is clear that the North Dakota landscape has evolved and changed significantly in the past decade, with notably more crop competition for acres. Vice Chairman Mark Birdsall of Berthold, says “wheat is still a dominant crop on my farming operation and seed business, and accounts for nearly 30% of the state’s crop acres, but there is no question that multiple crops are becoming common on most farming operations. Crop rotation is a good thing, with cross-crop benefits for not only soil, disease and weed issues, but the whole farming operation. We want wheat to be a profitable crop in that mix, and having the resources to expand investment in our public wheat breeding programs, as well as germplasm exploration for better disease and insect resistant traits in both wheat and durum, which benefits all breeding programs, is key to that effort. In addition, there are new technologies and breeding tools becoming available to wheat. North Dakota wheat growers need to be a part of that.”



NDSU Wheat Test Plots, 2024



Philippine Trade Team at Peltier Complex, August, 2024

The core program areas of the NDWC annual budget are international market development, research, domestic promotion, domestic and trade policy, and producer education and outreach. Market development and research each account for about one-third of the budget, with the remaining one-third split between the other areas. Board members Scott Huso of Aneta, and Aaron Kjelland of Park River have been directly involved with organizations such as the Wheat Foods Council, and customer education and training entities such as the Northern Crops Institute in Fargo, and the Wheat Marketing Center in Portland. They know the value of customer and consumer education, and that field

of need has accelerated in recent years, in part due to the proliferation of world competition, and false narratives about wheat and farming practices. In his testimony before Legislative committee members, Huso cited the need for expanded domestic marketing efforts to promote the high quality hard red spring grown right here in North Dakota with U.S. milling and baking companies, as well as in the South Asia region where export growth potential is most promising. In his testimony, Kjelland explained that, “Fad diets that eliminate some wheat food consumption, misinformation on wheat breeding and production practices, consumer perceptions about chemical use in farming, and perceptions of biotech crops and food issues are topics we are constantly battling.” The increased check-off level will be used to amplify efforts in this area and promote North Dakota grown wheat and durum in the right, positive light with U.S. consumers.

The wheat industry in the state has been a tremendous economic engine over the years for producers, the allied industries that provide inputs, market and transport the crop, and the state economy. “While the wheat landscape in the state does not look the same as it did 20 years ago, the value of investing in research, promotion and market development remains just as critically important, if not more, due to the heightened risk margins in farming, the proliferation of social media news, and more intense world competition,” Pellman explains. The new check-off level will help ensure the critical needs of North Dakota wheat producers can be addressed going forward.

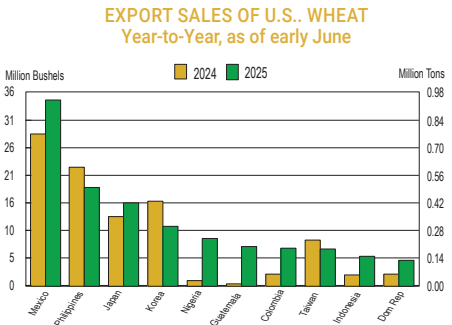


U.S. Wheat Export Sales Start Strong

The start to the 2025 marketing year on June 1 has been positive for U.S. wheat export sales. Total sales are at 195 million bushels, up nearly 20% from last year's 165 mb at this time. USDA is actually projecting a 2.5% decline from last year, so the better than anticipated start has been a positive for the market.

Sales of hard red winter have been especially strong, more than double last years pace at 73 million bushels. Soft red winter sales have also been strong, up 44% to 36 million bushels. Hard red spring sales have been slower than a year ago, down 7% to 51 million bushels. Soft white wheat and durum are also slower. U.S. wheat prices are very competitive on the world market in nearby slots, due to a weaker trending dollar, the start of the winter wheat harvest, and some uncertainty with the Russian crop. These dynamics will continue to shift going forward, as the EU is expected to become a larger exporter into the African and Middle East region this year.

The chart shows year to year comparison of sales for our top ten markets this year. Sales into parts of Africa, and the Latin American region are where the strongest early season gains are being made. This is being driven by hard red and soft red winter sales. In the North Asia region, sales have been slower, and are actually down from last year in key markets. Many of these markets are strong buyers of both hard red spring and soft white, and hopefully a stronger buying pace ensues as buyers get a better perspective on the 2025 crop.

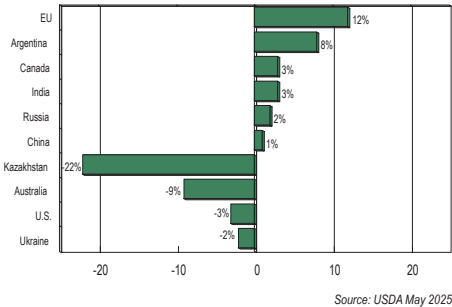


Record World Wheat Production Projected

The May USDA report provided the first look at world wheat production estimates for 2025-26, and associated supply and demand values. The forecast for global wheat production is a record 29.7 billion bushels, a slight increase over last year. World consumption is projected to fall just under production at 29.69 billion bushels. While this is just the first look at 2025-26 values, it sets the tone for the market. The overall situation points to a relatively stable supply and demand picture for the next year, at this point in time.

The EU is expected to have the largest year on year increase with production projected 12% higher to reach 5.5 billion bushels. Last year's crop was plagued by adverse weather condition, pushing production to a 30-year low in some countries. This year's weather has been more conducive and yields are projected higher. There are lingering concerns regarding potential quality loss in areas. Wheat production in Argentina could be 8% higher due to good weather and lower production costs which have boosted profitability, and plantings. The Canadian crop is estimated to be 3% higher, primarily due to higher acreage. While production in Russia is forecast to increase by 2% to 3.05 billion bushels, it remains below previous years when production was closer to 3.3-3.4 billion bushels. Weather continues to be a factor to watch in Russian wheat production. China and India, both significant wheat producers (though not generally exporters) are also expected to see increases, however, recent hot and dry conditions in China could trim estimates in future reports.

PROJECTED PRODUCTION CHANGES BY COUNTRY (%)



Wheat production in Kazakhstan could be 22% lower due to speculation that dry conditions could adversely impact yields. While wheat production in Australia is projected to fall by 9%, the estimate of 1.14 billion bushels is still above the ten-year average. Reductions in production are based of drier conditions in some areas of the country. Production in the U.S. is forecast to fall by 3% based off reduced area and slightly lower overall yields compared to last year. Production in Ukraine is also estimated to be slightly lower than last year.

The corresponding changes in production will undoubtedly result in shifts in trade. The USDA WASDE report projects a 254 million bushel increase in trade with the largest year to year increases in exports coming primarily from the EU and smaller amounts from Argentina and Ukraine. If the current projections for production and use hold, ending stocks are estimated at 9.76 billion bushels, a marginal increase from last year.

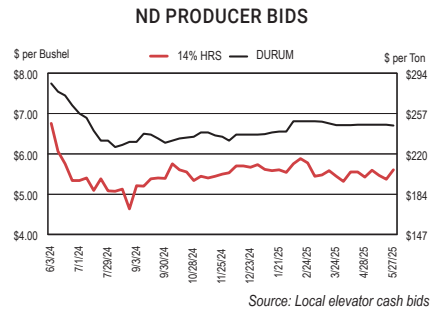
Durum Market Holds Strong

Prices for durum continue to hold strong, even as world production projections point to a steady crop size compared with 2024, at 1.3 billion bushels. Some recent ratcheting back in crop size in key countries, paired with very strong durum demand for food, the highest in seven years, is helping keep usage ahead of supply. In 2025, production gains in the EU and North African regions are being balanced against smaller crop expectations in the U.S., Mexico, Turkey and Kazakhstan. The lower production potential in Turkey and Mexico is helping to support the market in the nearby, as both countries have significantly lower export potential compared to recent years.

Durum plantings in Canada and the U.S. northern durum regions are expected to be steady to higher, and although the planting pace in both countries was ahead of normal, early yield projections are lower than last year, due to varying degrees of soil moisture deficits across key growing areas. Early germination has been good in most areas however, along with early crop growth. More than three-fourths of the North Dakota crop is rated in good to excellent condition. No condition ratings have been released on the Montana crop, but early crop moisture conditions have been more challenging there.

In Canada, about three-fourths of their durum crop is rated good to excellent condition, but dry soils are expanding with western and more northern areas of Saskatchewan being impacted most immediately.

The International Grains Council is projecting the Canadian crop at 213 million bushels, similar to 217 million bushels last year, while Agriculture Canada is projecting a smaller crop of 200 million bushels. The U.S. crop is estimated at 74 million bushels, down from 80 million bushels. Timely rains and no excessive heat will be needed in both countries over the next two months, or crop concerns could add further support to the market, given the lower exports from Turkey and Mexico.

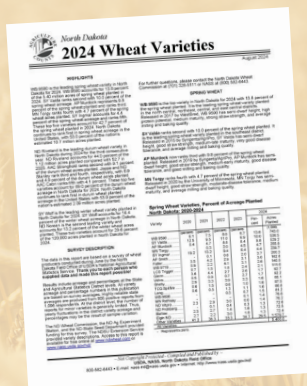


2401 46th Avenue Suite 104
Mandan, ND 58554-4829
ADDRESS SERVICE REQUESTED

PRESORTED
STANDARD
US POSTAGE PAID
BISMARCK, ND
PERMIT NO. 20

Dakota
GOLD

NDWC Encourages Producers to Participate in Variety Survey



The annual wheat variety survey provides pertinent information on variety trends across the state and within regions. Public and private wheat breeding programs, as well as allies in the seed production industry, use the data to monitor the success of their programs, analyze trends across regions of the state, and position themselves to develop better varieties to capture a greater share of acres. This data is also used with customers to show trends in quality, disease resistance and agronomic traits of popular varieties.

Customers purchase North Dakota wheat for its specific quality characteristics and monitoring trends in varieties helps them plan purchases and gain an understanding of quality trends and agronomic issues that impact planting decisions.

While the survey is conducted by USDA/NASS, it is done at the direction of the NDWC with funding provided by the Commission, ND State Seed Department and NDSU Ag Experiment Station. The NDWC encourages producers to fill out the wheat variety survey conducted by USDA/NASS. The survey is mailed to select producers and often followed up with a call from NASS enumerators. The survey can be submitted online as well. The reliability of the survey depends on an adequate number of responses and all information remains confidential. If you receive a survey, please consider assisting in these efforts and complete the variety survey.

Variety surveys from previous years can be found on the NDWC website - <https://www.ndwheat.com/crop-report>.