TerraMetrics Agriculture Inc.

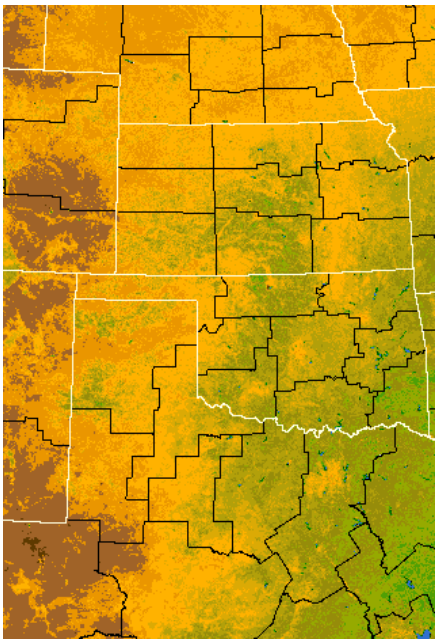
GREENREPORT®
US WHEAT BELT

NORMALIZED DIFFERENTIAL VEGETATION INDEX (NDVI) Period 12, March 10 - March 24, 2025

March 26, 2025

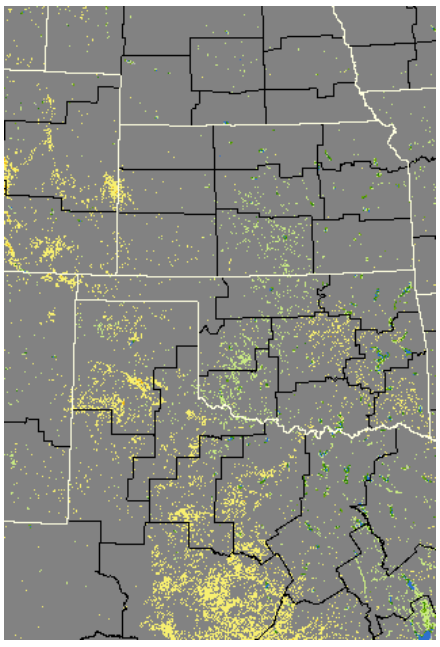
- Winter wheat emergence continued across central Kansas and Oklahoma this week but progressing slowly.
- Western High Plains are dealing with the negative impacts of significant drought conditions, particularly across central and southern Texas.
- While greenness is somewhat improved over last year in areas of Kansas, southeastern Colorado is in poor shape. Challenging conditions persist. Wheat, oats and pasture are rated "Mostly Poor" to "Very Poor."

GREENNESS VALUES

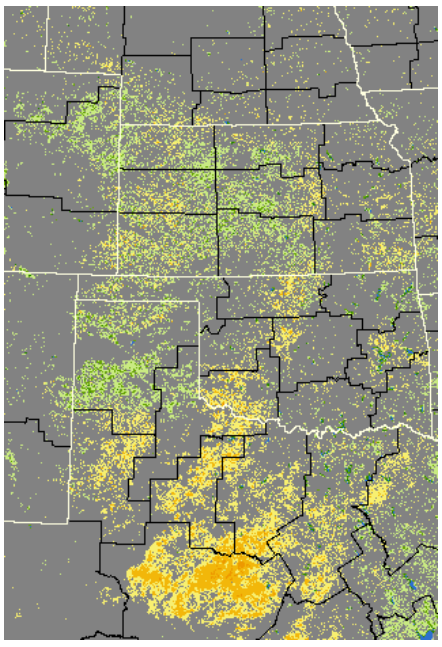


LOW Biomass HIGH

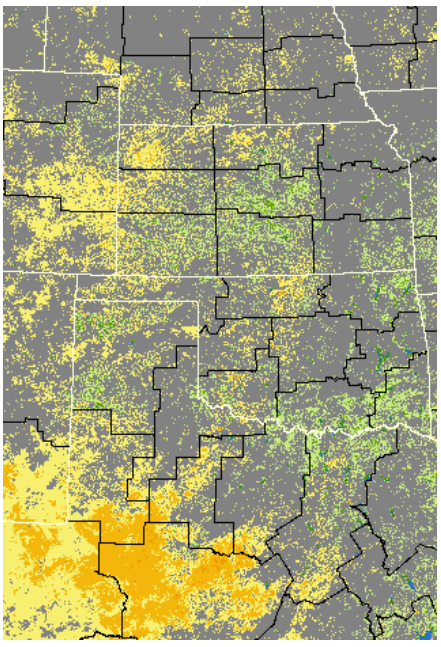
DIFFERENCE from LAST WEEK



DIFFERENCE from LAST YEAR



DIFFERENCE from AVERAGE



DECREASED GREENNESS

INCREASED GREENNESS

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USDA CROP CONDITIONS

The table below contains crop condition percentages from the most recent state-level USDA crop progress reports released 3/24/25 for the top-10 winter wheat states (for comparison, values from 3/25/24 are shown in parentheses). Full USDA progress reports will begin in two weeks.

State	VP-P	F	G-E	Historic Rank* Current
KS	17 (13)	34 (34)	49 (53)	19
WA	NA	NA	NA	13**
OK	29 (6)	34 (24)	37 (70)	12
MT	NA	NA	NA	24**
TX	37 (14)	32 (35)	31 (51)	14
CO	9 (4)	25 (28)	66 (68)	26
ID	NA	NA	NA	5**
NE	NA	NA	NA	3**
IL	NA	NA	NA	12**
OR	NA	NA	NA	19**
US	NA	NA	NA	**22****

* 1 = worst, 40 = best
** inferred from the February USDA monthly report

"Historic Rank" was determined by compiling nearby condition ratings since the mid-1980s and evaluating how the latest 2025 condition ratings stack up. While USDA is not yet reporting national condition numbers, compiling the available state values and looking at past reports, **we estimate the US winter wheat crop to have a rank of 22, putting it close to average**. As one might infer from ranks shown in the table, that US number appears more likely to be too high than too low, but we often see some big swings in condition once the USDA begins weekly reporting for the nation. Satellite greenness corroborates the crop condition numbers in that the developing winter wheat crop around the central US wheat belt is off to a decent but middling start, with fields in Kansas, Oklahoma, Texas, and southeastern Colorado facing drought headwinds and not much rain in the two-week outlook. Temperatures should be moderate, but winds will be active.

SUMMARY

Satellite greenness values suggest that the more developmentally advanced central and southern plains US winter wheat fields are off to an average start. Moist soils and opportune snow cover have thus far limited winter kill despite multiple bouts of extreme cold. Last week was generally warm and dry for winter wheat fields west of the Mississippi River, with the exception of above-normal moisture in the Pacific Northwest.

In the Central & Southern Great Plains growing region – which accounted for 47% of the US crop over the last 10 years – winter wheat fields are coming out of dormancy as far north as northern Kansas. While much of the area received beneficial fall/winter moisture, crop conditions are starting to suffer from increasing dryness and desiccating high winds (note all the blowing dust in the news in recent weeks). The outlook through early April consists mostly of seasonal temperatures and breezy conditions from North Dakota to Texas, and little moisture especially in southern portions where the crop is actively growing. Meanwhile, still-dormant fields in Nebraska and South Dakota have the best chance at a much-needed shot of moisture.