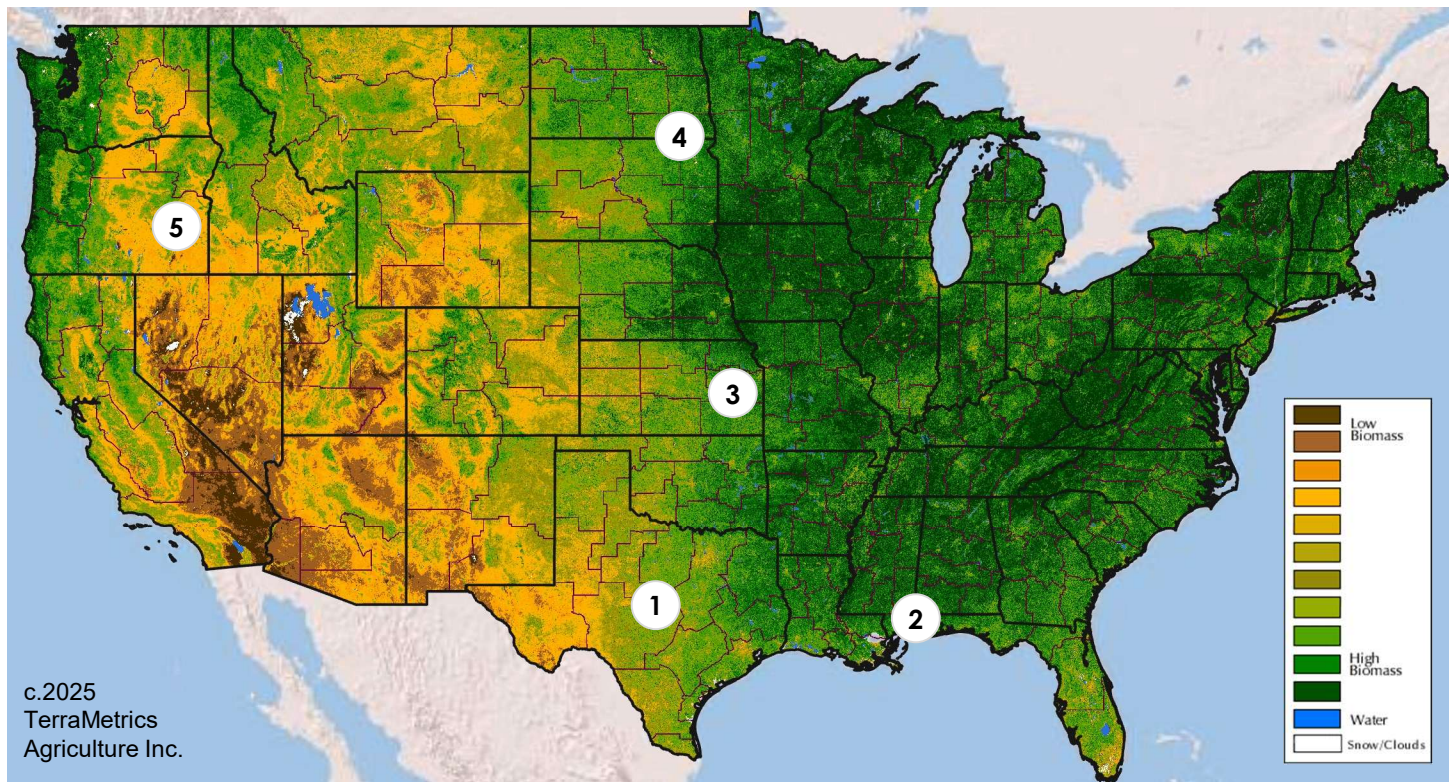


Normalized Differential Vegetation Index | Period 28, June 30 - July 14, 2025



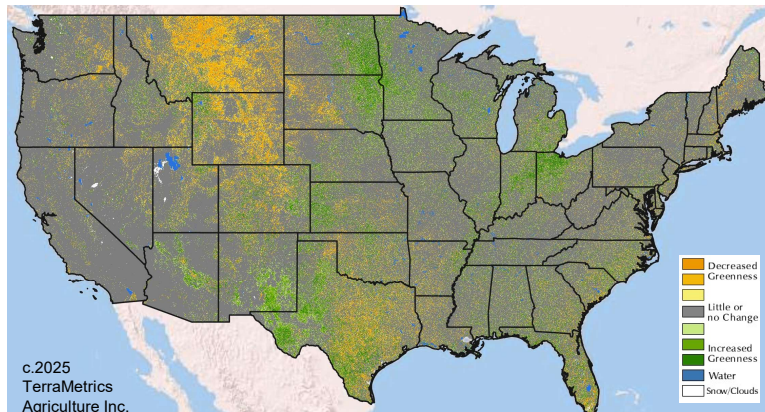
THIS WEEK'S HIGHLIGHTS...

1. We begin our weekly assessment with a return to the devastated hill country area of Texas. On the back of the tragic flooding event that occurred over the July 4th holiday, yet another prolonged heavy rain event over this past weekend produced a repeat of the massive flooding of the Guadalupe River. Fortunately, there were no additional casualties as this happened during daytime hours. On a broader scale, agriculture in the region has been devastated by the massive amount of water in the region. Drier weather is expected in the coming days, but probably too little, too late to salvage water-logged crops.
2. Tropical season has started slow, although peak season is still ahead of us. We're watching a disturbance that has moved into the northeast Gulf of Mexico. While it's currently uncertain if the system will become a named storm, regardless it will produce very heavy rains in the coming days, further boosting already robust moisture reserves. In fact, it may more likely produce adverse river and lowland flooding.
3. Most key growing areas of the Plains and Corn Belt regions have enjoyed a season of regular rains and lack of prolonged heat stress. However, guidance is increasingly suggesting the onset of a strong heat dome to set up over these high-producing areas later next week. If realized, this would be poorly timed given peak corn silking and other critical crop development stages.
4. Before that happens, unusually cool temperatures will settle into northern growing areas in the coming days. It's an area that has been catching up on heat units that have been lagging all season. With some recent replant of soybeans in the region given damage from severe storms, this won't help matters.
5. While it has become cooler in recent weeks, most of the Far West remains in dire condition given the prolonged lack of rainfall in what is typically their dry season. Given that, there is little to no chance of any moisture relief in the weeks ahead. As a result, all types of biomass will continue to suffer.

Vegetation Index Greenness Map | Period 28, June 30 - July 14, 2025

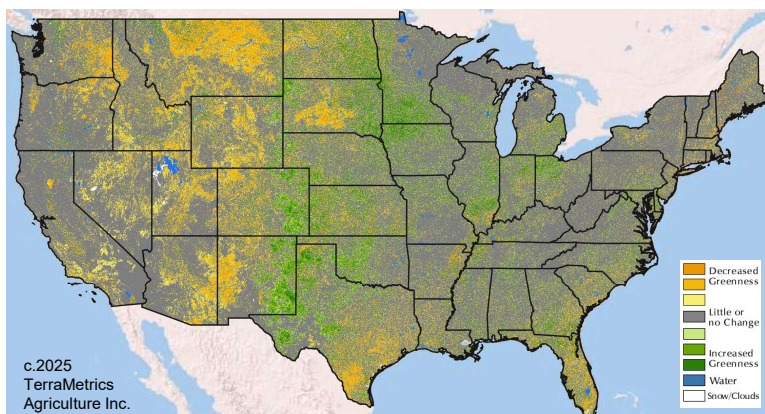
Change from Last Week

Week on week trends continue to show excellent positive greening over the majority of the Corn Belt and Plains regions. Frequent periods of showers and lack of extended heat episodes have corn, soybeans, and other summer crops healthy and developing well. Decreased Greenness for much of Texas and the Southern Plains reflects harvested wheat but also overly wet conditions. While the southern Rockies are looking good given monsoon moisture, not so further north increasingly suffering from extended dryness.



Change from Last Year

Greenness continues to look improved overall across most key growing areas of the Corn Belt and Plains with monsoon rains producing a good boost to biomass health. However, the entirety of the West to the west of the Front Range is suffering greatly, and the stark Greenness deficits have been increasing in intensity. Long term drought is fully entrenched such that even occasional showers from the Southwest Monsoon at times will do little to change the dire situation.



Change from Normal

Greenness trends remain notably positive across Corn Belt states into the entirety of the Plains. Biomass is looking robust and healthy given regular rains and good moisture reserves. Greenness in the Southeast is also looking robust given good soil moisture levels. More wet weather in the near term will only improve the good situation. Conversely, Greenness deficits in the parched western states have been increasing overall given bouts of strong heat and persistent dryness. Crop and rangelands are greatly suffering.

