

The image features a background of a wheat field under a blue sky with light clouds. In the top left corner, the words "OREGON" and "WHEAT" are stacked in a bold, white, sans-serif font. A stylized wheat stalk icon is positioned between the two words, with its stem extending downwards.

OREGON WHEAT

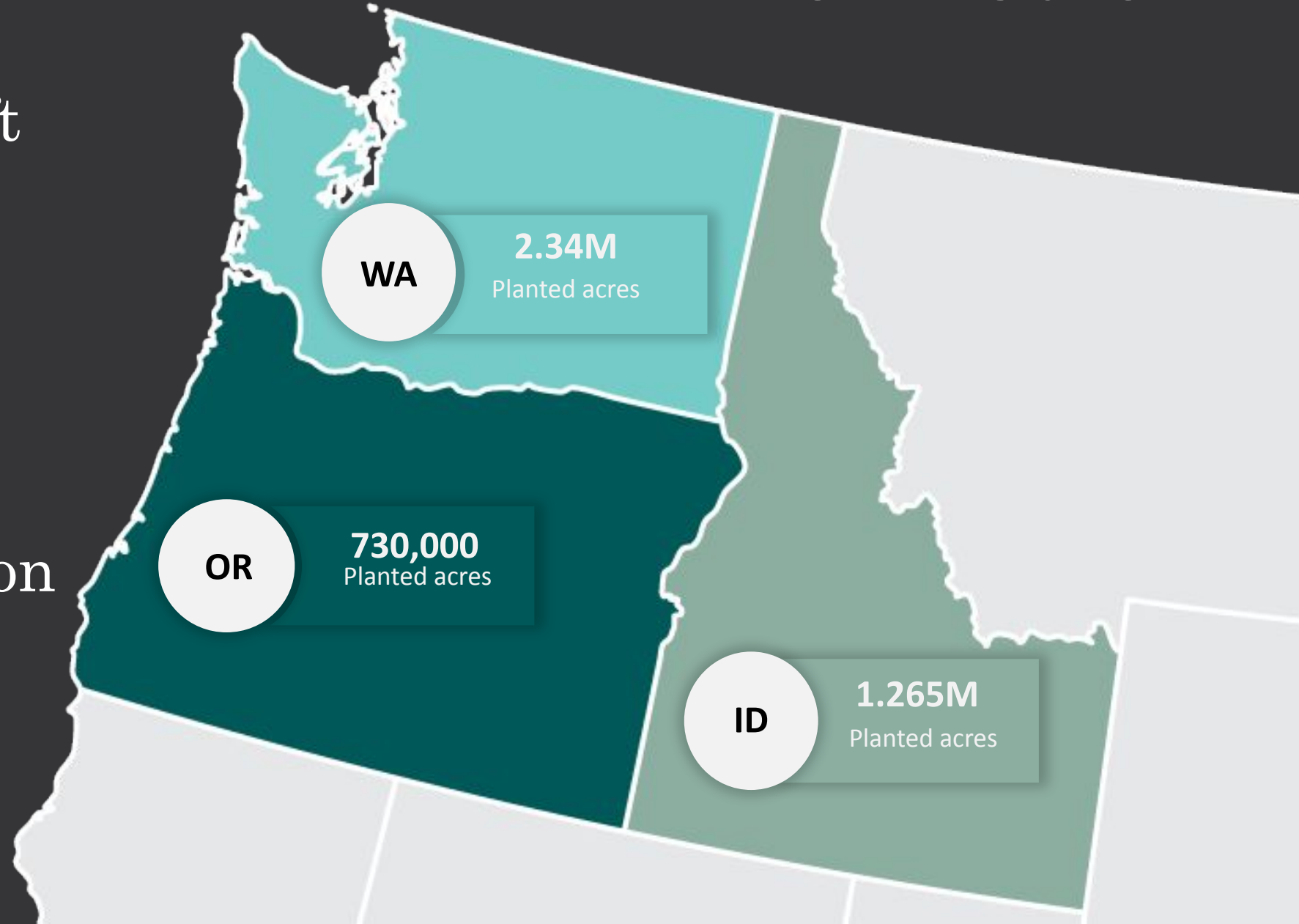
Overview of Production

Current State of Wheat

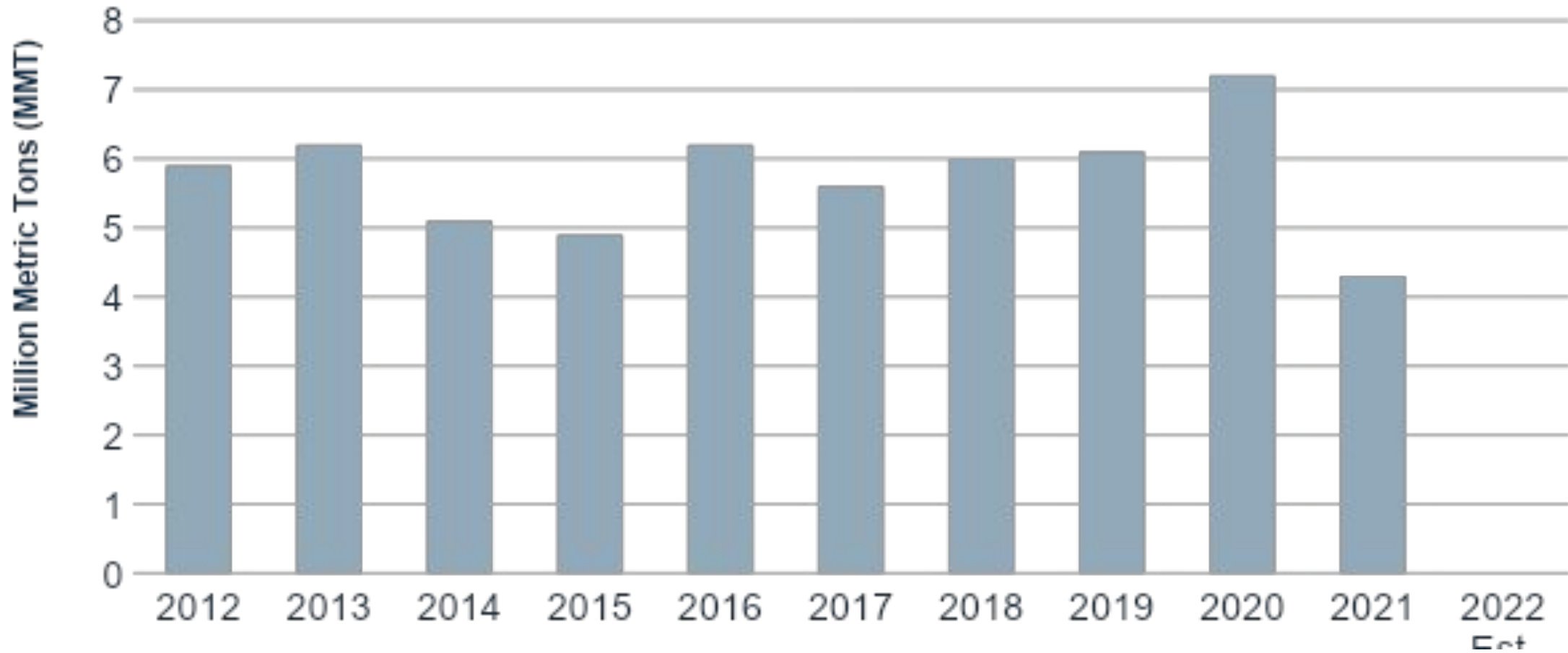
Upcoming Issues

Production

- Primarily Soft White Wheat
- Majority dryland
- Ave 211 Million bushels/year (5.75 MMT)



PNW Soft White Production



Source: USDA/WGC



FARM

RIVER/RAIL

OCEAN

TOP DESTINATIONS WHITE WHEAT



PHILIPPINES
SOUTH KOREA



CHINA
JAPAN
INDONESIA



YEMEN
NIGERIA
VIETNAM



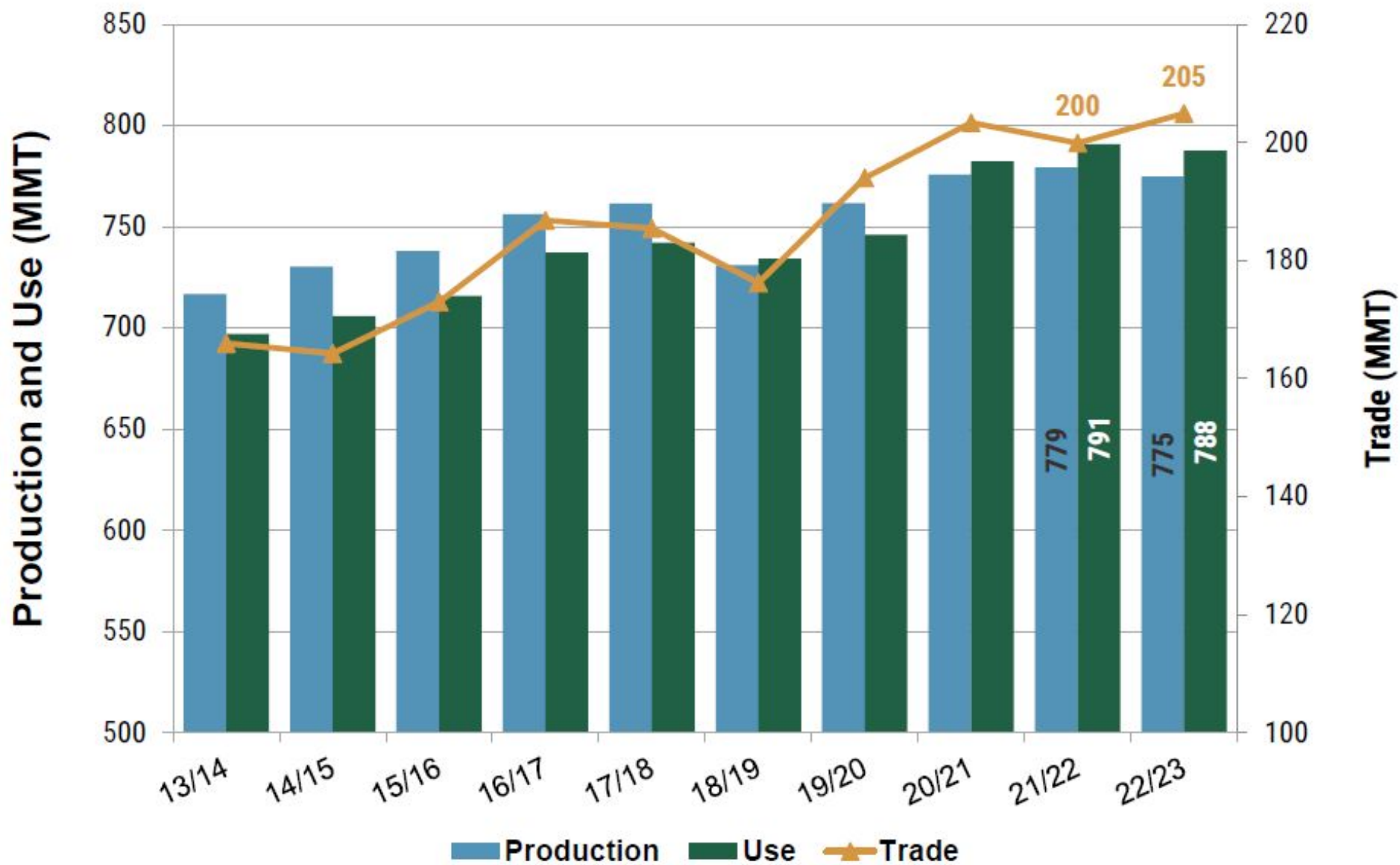
TAIWAN
CHILE



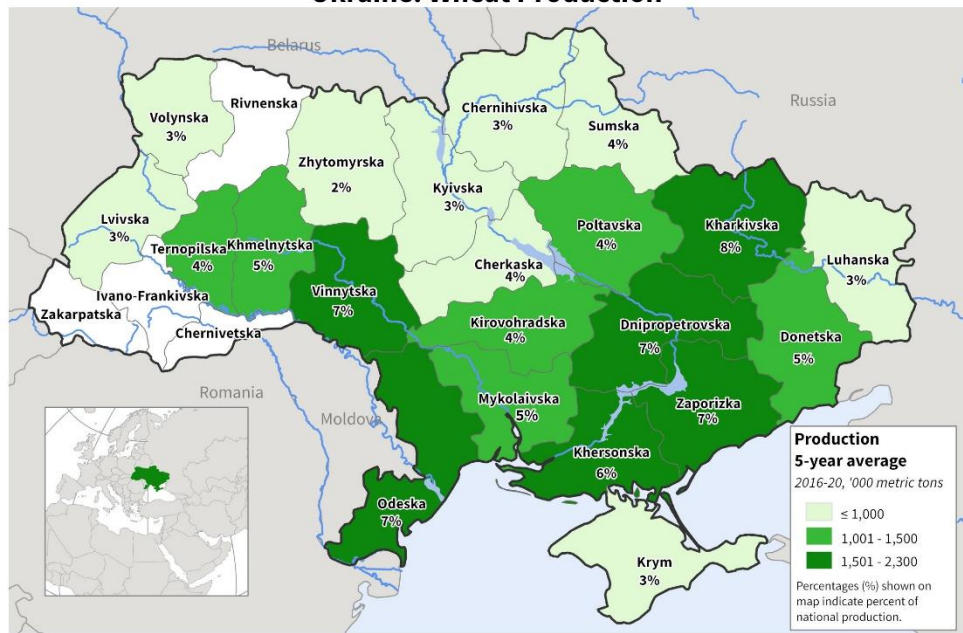
Markets

- 85-90% of Oregon Wheat is Exported
- Major customers: North and South Asia

World Wheat Production, Use and Trade



Ukraine: Wheat Production



USDA Foreign Agricultural Service

Source: State Statistics Service of Ukraine (Rosstat for Crimea Oblast)

Market Impacts

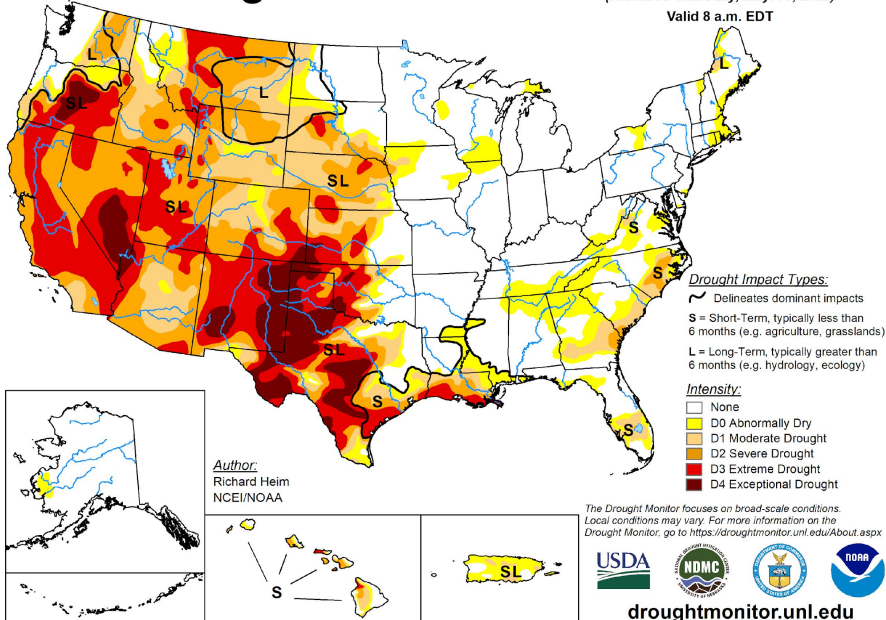
- Tight Stocks
- Russian Wheat Export Tax
- Ukraine/Russia War
- Input Costs; Freight Rates
- Protectionist Measures
- 2022 Crop Outlook

U.S. Drought Monitor

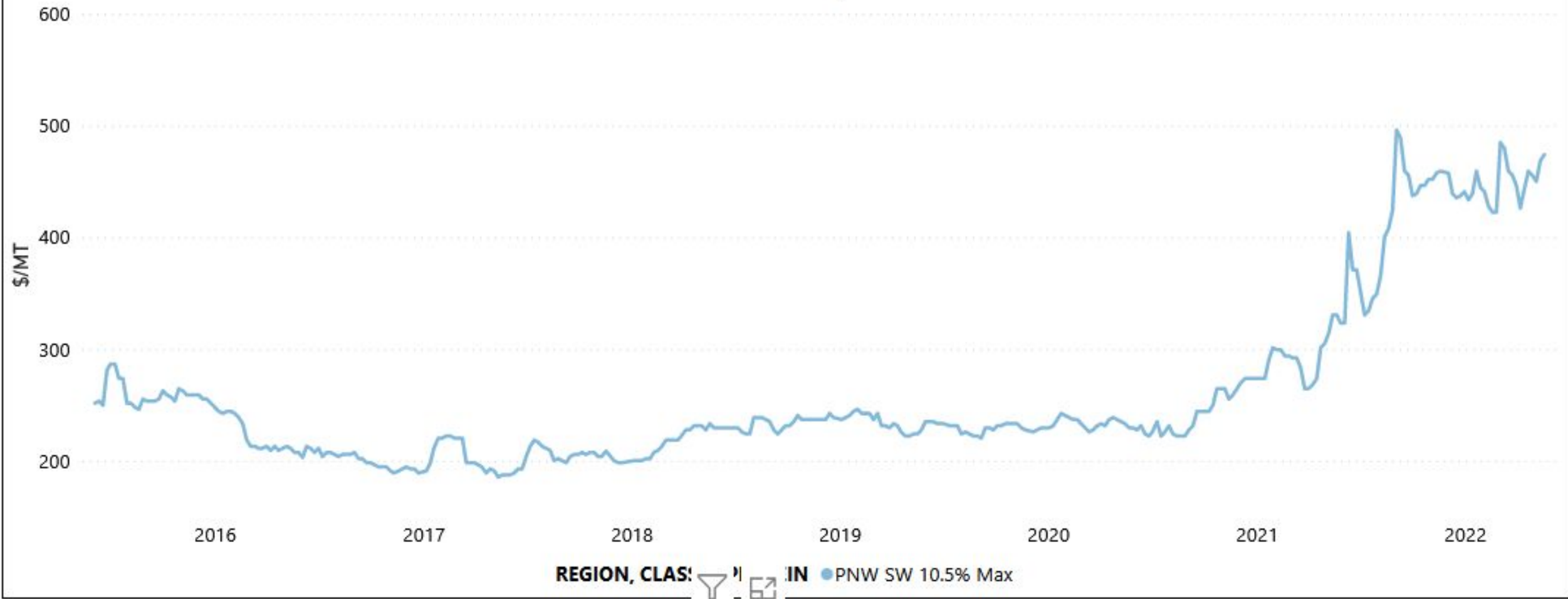
May 17, 2022

(Released Thursday, May, 19, 2022)

Valid 8 a.m. EDT



U.S. Wheat Nearby FOB Price



Friday, May 13, 2022

● PNW SW 10.5% Max 468.47

Source: US Wheat Associates



Upcoming Issues

- Input Prices and Availability
- Long-Term Drought Impacts
- Farm Bill and Risk Mitigation



Investing to Research



WHEAT VARIETAL
DEVELOPMENT



SOIL AND
CARBON
CENTER



RESILIENT
DRYLAND
FARMING



HERBICIDE
RESISTANT
WEEDS
INITIATIVE



Investing to Markets and Technology

Certification, Testing

Precision Agriculture

Stewardship Practices

Quality



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