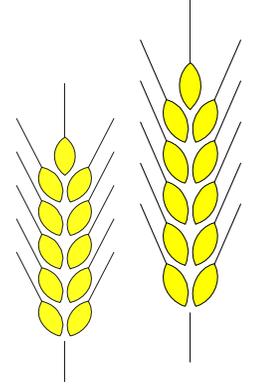


GrainMarket News

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PACIFIC
NORTHWEST

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Grains: Cash closing bids, to arrive Northwest Coast, as of July 24.

GRAINS:

Cash Grain Bids

WHEAT: July delivery, exporter bids in dollars per bushel

	This Week	Last Week	Last Year	June Average
US 1 Soft White	7.70-8.03	7.80-7.95	6.45-6.58	7.97
US 1 White Club	7.70-8.03	7.80-7.95	6.48-6.66	7.97
US 1 Hard Red Winter				
Ordinary Protein	NA	NA	6.54-6.61	NA
11% Protein	8.67-8.77	NA	6.70-6.77	NA
11.5% Protein	8.87-8.92	9.07-9.29 5/	6.78-6.85	9.91
12% Protein	8.87-8.92	9.09-9.34	6.78-6.85	10.13
13% Protein	8.97-9.03	9.17-9.44	6.86-6.93	10.19
13% Protein Montana Origin				
Milling Quality	8.97-9.03	9.17-9.44	6.88-6.93	NA
US 1 Dark Northern Spring				
13% Protein	9.25-9.32	9.37-9.57	6.99-7.03	10.71
14% Protein	9.35-9.55	9.45-9.65	7.03-7.11	10.79
15% Protein	9.35-9.63	9.45-9.65	7.03-7.11	10.79

FEED GRAINS: July delivery in dollars per short ton

US 2 Barley				
Unit Trains & Barges	NA	NA	175.00	NA
Single Rail Cars-Domestic 1/	NA	NA	NA	NA
Inland Feeding Areas 2/	NA	NA	NA	NA
US 1 White Wheat, Export	256.75-267.75	260.00-265.00	215.00-219.25	265.75
US 2 Yellow Corn 3/	239.00-240.25	259.25-264.75	146.00-157.75	286.75
US 2 Yellow Corn 4/	239.00-242.25	258.25-263.00	154.00-156.00	290.50
US 2 Heavy White Oats	220.00 *	220.00 *	190.00	220.00

1/ Full coast, 48 pound test weight or better, any origin. 2/ Rail and truck delivered to Yakima, WA and Hermiston, OR. 3/ Rail and truck delivered to the Yakima Valley. 4/ Single Rail Car delivery to Portland. 5/ July 17-20 delivery.

* Not well tested.

GRAINS: Closing cash prices, delivered selected markets, as of July 24.

MARKET	WHEAT	DOLLARS PER BUSHEL		FEED GRAINS	DOLLARS PER BUSHEL	
Great Falls	US 1 Hard Red Winter 11%	7.63	1/	US 1 Barley Malting	220.00	
Great Falls	US 1 Dark Northern Spring 14%	8.30	1/	US 2 Barley	175.50	1/
Ogden	US 1 Hard Winter 11%	7.47	1/	US 2 Barley	210.60	1/
Minneapolis	US 1 Dark Northern Spring 14%	10.17	3/	US 2 Barley	NA	
Minneapolis	US 1 Hard Amber Durum	NA	4/	US 2 Oats Non-Milling	NA	5/
Denver Area	US 1 Hard Winter, Ordinary	7.51		US 2 Yellow Corn	194.75	1/
Chicago	US 2 Soft Red Winter	NA	1/	US 2 Yellow Corn	NA	2/
Kansas City	US 1 Hard Winter, Ordinary	7.87		US 2 Yellow Sorghum	175.75	1/
New Orleans	US 2 Soft Red Winter	6.25	6/	US 1 Yellow Soybeans	481.00	6/

1/ Truck delivered. 2/ Processor bids. 3/ Milling quality. 4/ Choice milling quality. 5/ 20 days to arrive. 6/ Barge delivered.

NOTE: Chicago bids not available due to power outage.

SOFT WHITE WHEAT BIDS MIXED

HARD RED WINTER, DARK NORTHERN SPRING, AND CORN BIDS LOWER

BARLEY BIDS NOT WELL TESTED

PACIFIC NORTHWEST MARKET SUMMARY: Cash wheat futures ended the reporting week mixed, but mostly lower, compared to week ago bids. Bids for hard red winter wheat and dark northern spring wheat were lower, and bids for soft white wheat trended mixed, but mostly lower.

September wheat futures ended the reporting week on Thursday, July 24, moderately lower as follows compared to last Thursday's closes: Chicago 21-3/4 cents lower at \$7.87-3/4, Kansas City 22 cents lower at \$8.16-1/2, and Minneapolis 10-1/4 cents lower at \$8.69-3/4. Chicago September corn futures ended the reporting week 58-1/4 cents lower at \$5.73, and August soybean futures closed \$1.36 lower at \$13.85. Soybean futures were sharply lower most days of the reporting week in response to forecasts of beneficial wet weather in the Midwest during the development of U.S. soybean crops, Argentina's government removing its soybean export tax plan for the 2009

Pacific Northwest Market Summary: (Continued)

crop year, a disappointing U.S. weekly export inspection figure of 3.562 million bushels for the week ending July 17, a rise in the good-to-excellent crop ratings by 2 percentage points to 61 percent, and spill-over pressure from lower crude oil, soybean oil, and soybean meal markets. On Wednesday, soybeans had some support with trade concerns that soybean futures were oversold. Corn futures were lower each day of the week due to good crop weather in the U.S. corn-producing areas, a slight increase in the good-to-excellent corn crop ratings of 65 percent, lower crude oil markets, and a higher U.S. Dollar against foreign currencies. A delay until early August, with a decision from the Environmental Protection Agency regarding Texas' request to be waived on the federal renewable fuels mandate, also pressured corn futures. Wheat futures were also lower for the week. Lower corn, soybean, and crude oil markets, a higher U.S. Dollar value on Tuesday and Wednesday, and rainfall in Australia's wheat-growing area were some factors which weighed on wheat futures. A better-than-expected inspected-for-export figure of 28.378 million bushels and dry weather in the Northern Plains affecting Minneapolis spring wheat crops were supportive to wheat futures early in the week.

Bids for **US 1 Soft White Wheat** for full July Portland delivery were mixed, from 10 cents lower to eight cents higher compared to week ago bids for July delivery. Cash bids followed the lower Chicago September wheat futures. The continuation of harvest with good weather conditions also weighed on bids.

Bids for 11.5 percent protein **US 1 Hard Red Winter Wheat** for July Portland delivery were 20 to 21 cents per bushel lower compared to last Thursday's noon bids for July 21-31 delivery in lining up with the moderately lower Kansas City September wheat futures for the week. On Thursday, bids for 11.5 percent protein were as follows: July \$8.87 to \$8.92, mostly \$8.91; August \$8.77 to \$8.92; September \$8.87 to \$8.97; October \$9.06 to \$9.11; and November \$9.11 to \$9.19.

Bids for 14 percent protein **US 1 Dark Northern Spring Wheat** for July Portland delivery trended 10 cents per bushel lower than week ago bids. Lower Minneapolis September spring wheat futures and decreased exporter demand weighed on bids. On Thursday, bids for 14 percent protein were as follows: July \$9.35 to \$9.55, mostly \$9.45; August and September \$9.35 to \$9.55; October \$9.44 to \$9.72; and November \$9.52 to \$9.82.

Pacific Northwest Export News: There were eight grain vessels in Columbia River ports on Thursday, July 24, with three docked compared to eight last Thursday with two docked. New export sales made during the week were limited to Japan. Japan purchased the following wheat in metric tons (MT) for October shipment: 8,000 MT of 10.5 percent protein western white wheat, 12,000 of 11.7 percent protein hard red winter wheat, and 21,000 of 14.0 percent protein dark northern spring wheat.

Cash Soft White Wheat: Bids for US 1 Soft White Wheat for full July Portland delivery ended the reporting week on Thursday, July 24, at \$7.70 to \$8.03, mostly \$8.00, mixed, from 10 cents lower to eight cents per bushel higher than last Thursday's noon bids of \$7.80 to \$7.95, mostly \$7.90. There were no white club wheat premiums this week, compared to last Thursday's range of zero to five cents, mostly zero cents per bushel over soft white wheat bids. One year ago, bids for US 1 Soft White Wheat for July delivery were \$6.45 to \$6.48, mostly \$6.48. Year ago white club wheat premiums ranged from three to eight cents, mostly eight cents per bushel, over soft white wheat bids. Bids for US 1 Soft White Wheat for nearby Portland delivery began the reporting week on Friday at the weekly high of mostly \$8.00, then declined to mostly \$7.95 on Monday, holding there through Tuesday, and then continued to decline to mostly \$7.90 on Wednesday. Today (Thursday) the reporting week's close, bids returned to the weekly high of mostly \$8.00. Sharply lower Chicago September wheat futures for the week and the spreading of wheat harvest pressured soft white wheat bids. Confirmed new export sales this week were limited to Japan. Forward month bids were as follows: August \$7.90 to \$8.05; September \$8.00 to \$8.10; October \$8.03 to \$8.16; and November \$8.08 to \$8.22.

Outstanding U.S. white wheat export sales as of July 17, 2008, for the marketing year beginning June 1, 2008 and ending May 31, 2009, totaled 1,094.2 thousand MT compared to 1,017.0 thousand on July 10, 2008, and 948.0 thousand one year ago. Outstanding white wheat export sales for the 2008-2009 marketing year were to the following countries in 1,000 MT: Philippines 331.1, Japan 288.3, South Korea 154.2, Thailand 79.8, Sri Lanka 45.0, Yemen 45.0, Malaysia 17.0, Taiwan 12.0, Vietnam 12.0, Guatemala 10.2, United Arab Emirates 10.0, Singapore 4.0, Canada 1.2, Hong Kong 1.0, and total unknown 83.4. Accumulated white wheat export shipments as of July 17, 2008, in 1,000 MT, for the 2008-2009 marketing year, totaled 122.6 compared to 384.0 last year.

Outstanding U.S. barley export sales as of July 17, 2008, for the marketing year beginning June 1, 2008 and ending May 31, 2009, in 1,000 MT, totaled 99.5 compared to 85.6 on July 10, 2008, and 134.2 one year ago. Outstanding barley export sales were to the following countries in 1,000 MT: Japan 53.4, Canada 21.7, Mexico 21.1, and Taiwan 3.3. Accumulated barley export shipments as of July 17, 2008 were 9.3 thousand MT compared to 15.2 thousand one year ago.

Coarse Feeding Grains: Bids for **US 2 Barley** delivered to the coast in unit trains or barges during July were not available. Most exporters were not issuing old crop bids for barley. New crop August delivered barley bids were steady with week ago bids of \$225.00. Bids for September delivery were also steady at \$225.00 to \$227.00, and bids for October delivery remained steady with week ago bids of \$225.00 to \$229.00. Bids for US 2 Barley delivered to the inland feeding areas of Hermiston, Oregon and Yakima, Washington were not well tested. Bids for **US 2 Yellow Corn** delivered to Portland in single rail cars were \$19.25 to \$20.75 per ton lower at \$239.00 to \$242.25, compared to last Thursday's noon bids of \$258.25 to \$263.00. Bids for US 2 Yellow Corn truck delivered to the inland feeding areas of Yakima, Washington and Hermiston, Oregon were \$20.25 to \$24.50 per ton lower at \$239.00 to \$240.25 compared to week ago bids of \$259.25 to \$264.75. Sharply lower Chicago July corn futures for the week pressured cash corn bids. Bids for **US 2 Heavy White Oats** for July delivery were not well tested in extremely limited trading, but were indicated as \$220.00, steady with last Thursday's noon bids.

WHEAT: Cash closing bids for wheat delivered to the Pacific Northwest in dollars per bushel for nearby delivery.

DATE:	US 1 SOFT WHITE WHEAT		US 1 HARD RED WINTER WHEAT		US 1 HARD RED WINTER WHEAT		US 1 HARD RED WINTER WHEAT		US 1 DARK NORTHERN SPRING WHEAT	
	Week Ago		Week Ago		Week Ago		Week Ago		Week Ago	
	1/	2/	3/	4/	5/	6/	7/	8/	9/	10/
Friday July 18	8.04	8.31	8.38	8.65	8.38	8.65	8.38	8.65	8.88	8.97
	-	-	NA	NA	.80	.65	.88	.80	.80	.80
	8.00	8.00	NA	NA	9.18	9.30	9.26	9.45	9.68	9.77
Monday July 21	7.91	8.18	8.23	8.51	8.23	8.51	8.23	8.51	8.75	8.80
	-	-	NA	NA	.74	.65	.85	.80	.75	.80
	7.95	7.97	NA	NA	8.97	9.16	9.08	9.31	9.50	9.60
Tuesday July 22	7.97	8.11	8.24	8.44	8.24	8.44	8.24	8.44	8.75	8.75
	-	-	NA	NA	.74	.70	.85	.81	.75	.80
	7.95	7.95	NA	NA	8.98	9.14	9.09	9.25	9.50	9.55
Wednesday July 23	7.83	8.34	8.12	8.61	8.12	8.61	8.12	8.61	8.65	8.94
	-	-	NA	NA	.74	.80	.85	.85	.75	.80
	7.90	8.00	NA	NA	8.86	9.41	8.97	9.46	9.40	9.74
Thursday July 24	7.88	8.10	8.17	8.39	8.17	8.39	8.17	8.39	8.70	8.80
	-	-	NA	NA	.74	.80	.85	.88	.75	.80
	8.00	7.90	NA	NA	8.91	9.19	9.02	9.27	9.45	9.60

1/ Closing Chicago SEPTEMBER wheat futures. 2/ Basis. 3/ Closing cash bids. 4/ Closing Kansas City SEPTEMBER wheat futures. 5/ Closing Minneapolis SEPTEMBER wheat futures.

PACIFIC NORTHWEST TERMINAL GRAIN STOCKS WEEK ENDED JULY 17, 2008

	Wheat	Corn	Soybeans	Sorghum	Barley	Percent of Total Export Terminal Capacity Filled
THIS YEAR	5,330	364	2,484	NA	691	33
LAST YEAR	5,393	1,473	2,946	NA	193	38

WEEKLY BARGE SHIPMENTS: Wheat and barley in 1,000 bushels, with comparison-crop year June-May (weight at time of unloading).1/

Week Ended	WHEAT				BARLEY			
	This Week	Week Year Ago	Current Total	Year Ago Total	This Week	Week Year Ago	Current Total	Year Ago Total
July 13	119	1,617**	4,594	10,869	0	0	111	591
July 20	1,131	2,638	5,725	13,507	0	0	111	591

1/ Includes only grain inspected by the Federal Grain Inspection Service and the Washington State Department of Agriculture. **Correction.

NATIONAL AGRICULTURAL SUMMARY July 14-20, 2008 USDA Released 07/22/08

Corn: Corn at or beyond silking progressed 21 points during the week, reaching 34 percent complete by week's end. Progress was 38 points behind last year and 26 points behind the 5-year average. Development remained behind in the Corn Belt, due to late planting and excessive moisture. In the northern and western Corn Belt, rains continued in Iowa, Kansas, Minnesota, Nebraska, and Wisconsin, as up to 5 inches fell in isolated areas. Silking progress advanced significantly in Illinois, Indiana, and Nebraska, advancing 30 or more points during the week. Development was behind normal throughout all major corn-producing states, except Colorado, North Carolina, and Pennsylvania. Corn condition ratings improved 1 point during the week to 65 percent rated good to excellent.

Soybeans: Development advanced rapidly in most states as 19 percent of the acreage at the national level reached the blooming stage during the week, totaling 45 percent by week's end. Despite the improvement, acreage at or beyond the blooming stage remained 25 points behind the previous year's pace, and 20 points behind the 5-year average. Development delays were evident in all states except Michigan and North Carolina, where ideal weather conditions kept development 10 and 9 points ahead of normal, respectively. Only half of the soybean-producing states had 50 percent or more of their acreage blooming. Condition ratings of the soybean crop increased 2 points during the week to 61 percent good to excellent.

Wheat: Acreage of winter wheat harvested reached 71 percent by week's end, 7 points behind last year, and 8 points behind the usual harvest pace. Major harvest activity was evident in Michigan, Nebraska, and Ohio during the week as 43 percent of the crop in Michigan and Nebraska was harvested, and producers in Ohio harvested 55 percent of their acreage. Harvest was complete in Arkansas, Kansas, North Carolina, Oklahoma, and Texas, while in Idaho, Montana, South Dakota, and Washington, less than 10 percent of the acreage had been harvested. The most significant harvest delays across the country were in Colorado and South Dakota, where harvest was 38 and 54 points behind the average, respectively.

Sorghum: Heading progressed only 5 points during the week to 33 percent headed, 12 points behind last year and 5 points behind the 5-year average. Heading was ahead of normal in Colorado, Louisiana, New Mexico, and Oklahoma, due to favorable conditions consisting of the previous week's rains. Elsewhere, heading was delayed. Significant delays were evident in Arkansas and South Dakota, where more than 20 percent of the crop was developing behind normal. Fifty-six percent of the crop reached or exceeded coloring in Louisiana and Texas, and one-fifth of the acreage in Colorado was at or beyond coloring. The condition of sorghum was rated at 51 percent good to excellent, 1 point above the previous week's rating.

Small Grains: Spring wheat heading was nearly complete with 95 percent headed, 2 points behind last year, but 1 point ahead of the 5-year average. Heading progress was within 6 points of normal in all states except Idaho and Minnesota, where progress trailed the average by 14 and 8 points, respectively. Heading was complete in South Dakota and Washington. Condition ratings increased to 63 percent good to excellent, 2 points above a week earlier. Ninety-three percent of the barley acreage was heading, 5 points behind last year but equal to the 5-year average. Progress was behind last year and normal in Idaho, Minnesota, and Montana. Fifty-eight percent of the barley acreage was rated in good-to-excellent condition, compared with 67 percent last week, declining in all states except Minnesota, where the condition of the crop improved 4 points. Oat acreage was 98 percent headed, 2 points behind last year, but the same as the 5-year average. Harvest advanced only 2 points during the week to reach 12 percent by week's end, 11 and 7 points behind last year and normal, respectively. Harvest in Nebraska was significantly behind last year and the 5-year average, lagging 36 and 33 points behind, respectively. Condition of the crop was rated 62 percent good to excellent, increasing 1 point from the previous week's rating.

FSU-WESTERN:

Several days of hot, dry weather aided winter grain harvesting in Russia. Light to moderate showers favored summer crop development in Ukraine but caused some interruptions in winter grain harvesting.

FSU-NEW LANDS:

Showers and cooler weather improved growing conditions for spring wheat in Kazakhstan, while hot, dry weather stressed crops in the Urals District in Russia.

EUROPE:

Rain improved prospects for vegetative summer crops in northeastern Europe, while dry weather stressed reproductive corn and sunflowers in the Balkans.

AUSTRALIA:

Soaking rain helped winter wheat and barley establishment in Western Australia, while elsewhere scattered showers benefited vegetative winter grains.

EAST ASIA:

Monsoon showers favored summer crops across the North China Plain and Manchuria.

SOUTHEAST ASIA:

Monsoon showers maintained favorable moisture conditions for rice and corn in Thailand, while Tropical Cyclone Kalmaegi caused flooding in the northern Philippines.

SOUTH ASIA:

Heavy monsoon rain across northern India contrasted with increasing dryness in the south.

ARGENTINA:

Warm, mostly dry weather promoted planting and germination of winter grains.

BRAZIL:

Conditions favored harvesting of coffee, sugarcane, and citrus.

CANADA:

Mild, showery weather benefited most Prairie crop areas.

MEXICO:

Warmer, generally drier weather promoted development of corn and other summer crops.

EUROPE: Wet weather across northeastern Europe contrasted with increasing dryness in the Balkans. A pair of slow-moving cold fronts generated widespread showers and thunderstorms (10-55 mm) from Germany and the Low Countries eastward into Poland and the Baltics. The rain eased topsoil moisture deficits and boosted prospects for heading spring grains and vegetative summer crops. Drier weather (less than 5 mm of rain) returned to France and southeastern England, allowing farmers to resume winter crop harvesting; winter wheat harvesting is reportedly running approximately 1 to 2 weeks behind the long-term average across portions of northern Europe due to the recent wet weather. In contrast, mostly dry conditions in the Balkans reduced soil moisture for reproductive corn and sunflowers. Elsewhere, 10 to 50 mm of rain maintained favorable prospects for reproductive summer crops in northern Italy, while dry weather and seasonable temperatures in Spain promoted late winter crop harvesting.

EAST ASIA: The monsoon brought heavy showers to much of the east and northeast, while drier weather in the south eased wetness. Across Manchuria, a series of low pressure systems moved along the monsoon trough, spawning heavy to locally intense rainfall (25-200 mm) early in the week. Likewise, drenching rains (50-200 mm) occurred throughout most of the North China Plain, likely causing some localized flooding. The showers provided abundant to excessive moisture throughout the soil profile, ensuring well watered summer crops. Farther south, Tropical Cyclone Kalmaegi intensified rapidly into a category 2 typhoon (83-95 kts) before crossing northern Taiwan late in the week. Typhoon Kalmaegi weakened quickly into a tropical storm (34-63 kts) prior to making landfall in southeastern China, and brought showers (25-200 mm) to the coastal provinces. Kalmaegi sapped much of the moisture that had been across southern China, resulting in drier weather throughout the Yangtze Valley and southern rice growing areas. The drier weather improved conditions in areas previously experiencing persistent wetness.

SOUTHEAST ASIA: Monsoon showers (25-100 mm) increased across Thailand benefiting rice and corn. Meanwhile, mostly dry weather in southern Vietnam aided maturing summer-autumn rice, but locally heavy showers (50-200 mm) caused some flooding in the north. Tropical Cyclone Kalmaegi formed off the northeast coast of the Philippines early in the week and quickly intensified into a category 2 typhoon as it approached Taiwan. Kalmaegi brought torrential rain (100-400 mm, locally over 400 mm) to much of Luzon in the Philippines, causing flooding to agriculturally sensitive areas including the Cagayan Valley. The flooding likely resulted in localized damage to rice and corn that will necessitate replanting. Elsewhere in the Philippines, however, seasonable showers (25-100 mm) maintained favorable soil moisture for corn and rice in the Visayas and across Mindanao. Seasonably heavy showers (25-200 mm) prevailed in oil palm areas of Malaysia and Indonesia, providing abundant to excessive moisture and likely slowing harvest activities. The exception was Borneo, where rain was lighter (10-25 mm).

SOUTH ASIA: Heavy rainfall across northern India contrasted with increasing dryness in southern crop areas. A strong monsoon circulation generated locally torrential downpours (50-340 mm) across northern growing areas, causing flooding but maintaining abundant moisture reserves for cotton, rice, and sugarcane. Drier weather (less than 20 mm of rain) returned to central and western Madhya Pradesh (a key soybean area), allowing fields to drain following last week's deluge. In contrast, dryness remained a concern in cotton areas of interior Maharashtra; as of July 20, season-to-date rainfall was less than 50 percent of normal, making the first half of the 2008 monsoon the driest over the past 30 years in south-central India. Beneficial rain (25-100 mm) returned, however, to India's southern-most growing areas, providing moisture for cotton and groundnuts. Monsoon showers (50-150 mm) continued across the eastern half of India as well as most of Bangladesh, maintaining favorable moisture supplies for rice. In Pakistan, dry weather prevailed over most primary summer crop areas, although heavy rain in far northern provinces boosted irrigation reserves for cotton and rice. In southern Pakistan, however, the delayed monsoon sustained high irrigation demands and likely discouraged some farmers from planting crops until seasonal showers arrive.

CANADA: Mild, showery weather (temperatures averaging 1-2 degrees C below normal, with rainfall totaling 5-25 mm or more) continued across the Prairies, increasing moisture for vegetative to reproductive spring grains and oilseeds but likely hampering field activities. Unseasonable dryness continued, however, in Alberta's Peace River Valley and a few locations in southern Saskatchewan, where moisture has been limited for normal development of spring crops for much of the season. Scattered showers (5-25 mm or more) and summer warmth (highs reaching the lower 30s degrees C) promoted development of summer crops and pastures across Ontario. Heavier rain (25-50 mm or more) and seasonable temperatures (highs in the upper 20s degrees C) were recorded in southern Quebec.

MEXICO: Rainfall tapered off from recent weeks in most Mexican farming areas and, after several weeks of beneficial rain, the warmer, drier weather favored development of corn and other summer crops. Rainfall totaled 10 to 25 mm or more in western and central sections of the southern plateau corn belt, but rainfall was generally scattered and light elsewhere in the south.