A weekly publication of the
Transportation and Marketing Programs/Transportation Services Division
www.ams.usda.gov/GTR

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Sept. 16, 2010

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WEEKLY HIGHLIGHTS

Corn Harvest Ahead of Normal Pace; Requires Earlier Than Normal Transport Needs

As of September 12, the corn harvest is ahead of the normal pace for this time of year, with 11 percent of the corn harvested nationwide compared to the average of 6 percent. In four States, half or more of the corn has been harvested: Tennessee (72 percent), North Carolina (67 percent), Kentucky (54 percent), and Texas (50 percent, but Texas is behind its normal pace of 66 percent harvested). Illinois has 18 percent of its corn harvested, three times its average pace. Indiana corn is 13 percent harvested, significantly ahead of its 2 percent average. Kansas corn is 28 percent harvested, double the average pace. This is significant news for planning transportation needs as movements of this year's corn will begin earlier than normal, and are significantly ahead of last year's rain-delayed harvest.

Grain Transportation Demand Expected to be Strong

Grain transportation demand for the record 2010/11 grain crop is expected to be strong. The September World Agricultural Supply and Demand Estimates forecasts grain exports (corn, soybeans, and wheat) will increase 12 percent from last year and will be approximately the same as 2007/08, when grain exports were unusually high due to crop failures in other countries. Domestic use will be down 1 percent from last year, but will be 8 percent greater than during 2007/08.

Increased Shipments to Asia and South America Continue to Drive Wheat Inspections

For the week ending September 9, total wheat inspections (0.813 mmt) were up 29 percent from the previous week—the highest since October 2, 2008—with increased shipments to Asia, South America, and Mexico. Texas Gulf wheat inspections increased 76 percent from the previous week to .333 mmt, the highest since July 17, 2008. **Total inspections** of grain (corn, wheat, and soybeans) from all major U.S. export regions, at 1.85 million metric tons (mmt), decreased by 1 percent from the previous week, but were 5 percent above last year. Corn inspections increased slightly as Mississippi Gulf inspections remained strong. Despite the 54 percent drop in soybean inspections, the 4-week average for weekly grain inspections overall continued above last year and the 3-year average.

Revisions to the GTR Tariff Rail Rate Table

Table 7, **Tariff Rail Rates for Unit and Shuttle Train Shipments**, within the Grain Transportation Report has been revised beginning this week. Data already collected for the previous table will be preserved and available upon request. The revised table publishes rates for 38 carefully chosen origin-destination regions compared to only 28 in the previous table. More than 20 percent of wheat, corn, and soybean movements are represented by the newly chosen origin-destination regions. For more detail on the changes, please see this week's feature article.

Panama Canal Lock Maintenance Scheduled

The West Sidewall Culvert of the Gatun Lock is scheduled for repair and maintenance work during September 20–30. The estimated transit capacity of the Canal due to the closure is 29–33 vessels compared to normal transit capacity of 38–40 vessels per day. At this time, no major delays are anticipated.

Snapshots by Sector

Rail

U.S. railroads originated 23,998 **carloads of grain** during the week ending September 4, up 10 percent from last week, 16 percent from last year, and 1 percent from the 3-year average.

During the week ending September 11, average September non-shuttle **secondary railcar bids/offers** were $600 above tariff, down $150 from last week. Average shuttle rates were $100 below tariff, down $813 from last week.

Ocean

During the week ending September 9, 42 **ocean-going grain vessels** were loaded in the Gulf, up 14 percent from last year. Fifty-six vessels are expected to be loaded in the Gulf within the next 10 days, up 27 percent from last year.

During the week ending September 10, the cost of shipping grain from the Gulf to Japan averaged $68 per mt, up 5 percent from the previous week. The rate from the Pacific Northwest to Japan was $40 per mt, up 14 percent from the previous week.

Barge

During the week ending Sep 11, **barge grain movements** totaled 495,318 tons, 0.33 percent lower than the previous week but 59 percent higher than the same period last year.

Feature Article/Calendar

Revised Rail Tariff Table Captures More Grain Movements

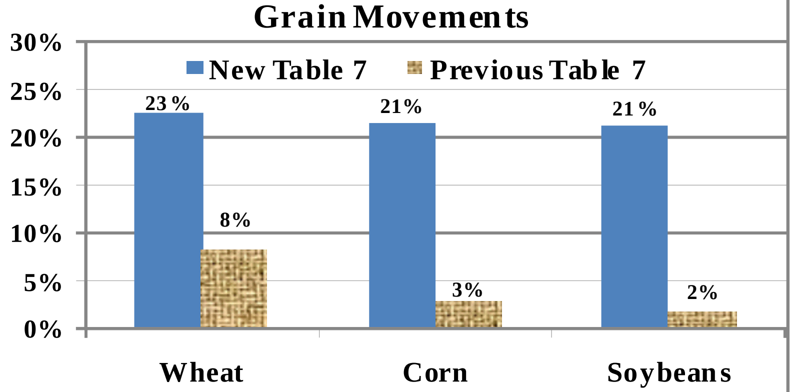
The Grain Transportation Report (GTR) staff is continually looking for ways to improve the information it reports and to ensure that information reflects the marketplace as accurately as possible. As a result, the **GTR Table 7** (Tariff Rail Rates for Unit and Shuttle Train Shipments) has been revised. Beginning with this week's GTR, the changes include the following:

- More origin-destination (O-D) pairs are reported, based upon volume, destination, origin ranks, and regional importance
- The tariff rates reported are for the larger 286,000 pound cars, reflecting the grain industry's shift to larger covered hopper cars
- More shuttle train O-D pairs are included to reflect the increased importance of shuttle trains for grain movements

More than 20 percent of the total rail movements of wheat, corn, and soybeans are captured by the new O-D pairs in GTR Table 7 (see Figure 1).[1] This is mainly due to the selection of routes that cover greater grain traffic volumes. In addition, the new Table 7 includes 10 more pairs than the previous table. This allows for greater geographical coverage and provides a better service to our readers, who can compare their rates across a broader spectrum of O-D pairs.

The new Table 7 reports 38 O-D pairs, including 19 for unit train shipments (down from 22), and 19 for shuttle train movements (up from 6). For more details, see Table 1 below.

Figure 1: New Origin-Destination Pairs Capture a Higher Percentage of Grain Movements



Sources: STB Confidential Waybill Samples, 2003-2008
AAR, Rail Transportation of Grain, 2009

These wheat routes were kept:

- South Central KS, to Galveston-Houston, TX
- Chicago, IL, to Albany, NY
- Northwest KS, to Portland, OR

These are now shown as shuttle-train movements rather than unit-train movements to reflect the growing importance of shuttle trains.

These corn routes were kept:

- Minneapolis, MN, to Portland, OR
- Council Bluffs, IA, to Stockton, CA

The Minneapolis-to-Portland movement was shown as both unit-train and shuttle-train movements, but is now shown only as a shuttle-train movement. The Council Bluffs-to-Stockton movement is now shown as a shuttle-train movement rather than as a unit-train movement.

The only soybean route that was kept was from Minneapolis, MN, to Portland, OR, which remains as a shuttle-train movement (see Table 1).

[1] Total rail movements are calculated as the sum of the 2003–2008 rail movements of each grain as reported in the AAR Rail Transportation of Grain, 2009.

A historical data set has been developed for the revised Table 7, including tariff rates since June 2010. The historical data set for the previous Table 7 will be preserved, but new data for those O-D pairs will not continue to be collected.

Although the new O-D pairs include higher volume routes, the GTR staff endeavored to also keep a wide regional representation rather than selecting based only upon volume. We hope that the new table will serve your needs better. As always, the GTR staff will continue to look for improvements in the report and we welcome your suggestions. Marvin.Prater@ams.usda.gov, Pierre.Bahizi@ams.usda.gov

Table 1: Rankings of New O-D Pairs Used in the Revised Tariff Rail Rate Table

	Origin region*	Destination region*	Volume Rank	Destination Rank	Origin Rank
Unit train (19)					
Wheat (7)	South Central KS	St. Louis, MO	15	4	1
	Grand Forks, ND	Duluth-Superior, MN	6	5	3
	South Central KS	Los Angeles, CA	18	7	1
	South Central KS	New Orleans, LA	45	10	1
	Sioux Falls, SD	Galveston-Houston, TX	28	2	8
	Denver and Northwest KS	Galveston-Houston, TX	23	2	11
	Amarillo, TX	Los Angeles, CA	36	7	12
Corn (7)	Champaign-Urbana, IL	New Orleans, LA	3	7	3
	Toledo, OH	Raleigh, NC	37	20	10
	Des Moines, IA	Davenport, IA	5	17	1
	Indianapolis, IN	Atlanta, GA	11	6	5
	Indianapolis, IN	Knoxville, TN	14	18	5
	Des Moines, IA	Little Rock, AR	19	11	1
	Des Moines, IA	Los Angeles, CA	23	12	1
Soybeans (5)	Minneapolis, MN	New Orleans, LA	88	3	4
	Toledo, OH	Huntsville, AL	16	4	14
	Indianapolis, IN	Raleigh, NC	82	18	5
	Indianapolis, IN	Huntsville, AL	17	6	5
	Champaign-Urbana, IL	New Orleans, LA	8	3	6
Shuttle Train (19)					
Wheat (6)	Great Falls, MT	Portland, OR	1	1	5
	South Central KS	Galveston-Houston, TX	2	2	1
	Chicago, IL	Albany, NY	7	12	2
	Grand Forks, ND	Portland, OR	9	1	3
	Grand Forks, ND	Galveston-Houston, TX	96	2	3
	Denver and Northwest KS	Portland, OR	62	1	11
Corn (7)	Minneapolis, MN	Portland, OR	8	4	2
	Sioux Falls, SD	Tacoma, WA	2	1	8
	Champaign-Urbana, IL	New Orleans, LA	3	7	3
	Lincoln, NE	Galveston-Houston, TX	25	8	9
	Des Moines, IA	Amarillo, TX	9	2	1
	Minneapolis, MN	Tacoma, WA	1	1	2
	Council Bluffs, IA	Stockton, CA	12	9	7
Soybeans (6)	Sioux Falls, SD	Tacoma, WA	3	1	2
	Minneapolis, MN	Portland, OR	10	2	4
	Fargo, ND	Tacoma, WA	2	1	1
	Council Bluffs, IA	New Orleans, LA	21	3	11
	Toledo, OH	Huntsville, AL	16	4	14
	Grand Island, NE	Portland, OR	19	2	10

* Regional economic areas defined by the Bureau of Economic Analysis (BEA)

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail[2]	Barge	Ocean	
Week ending				Gulf	Pacific
09/15/10	198	970	264	304	284
09/08/10	197	795	275	291	248

[1]Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = nearby secondary rail market ($/car); barge = Illinois River barge rate (index = percent of tariff rate); and ocean = routes to Japan ($/metric ton)

[2]The rail indicator is not an index. It is the difference between the nearby secondary rail market bid for this week and the average bid for year 2000 (+) 100.

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

Market Update: U.S. Origins to Export Position Price Spreads ($/bushel)

Commodity	Origin--Destination	9/10/2010	9/3/2010
Corn	IL--Gulf	-0.68	-0.80
Corn	NE--Gulf	-0.97	-1.03
Soybean	IA--Gulf	-0.99	-0.84
HRW	KS--Gulf	-1.65	-1.80
HRS	ND--Portland	-4.15	n/a

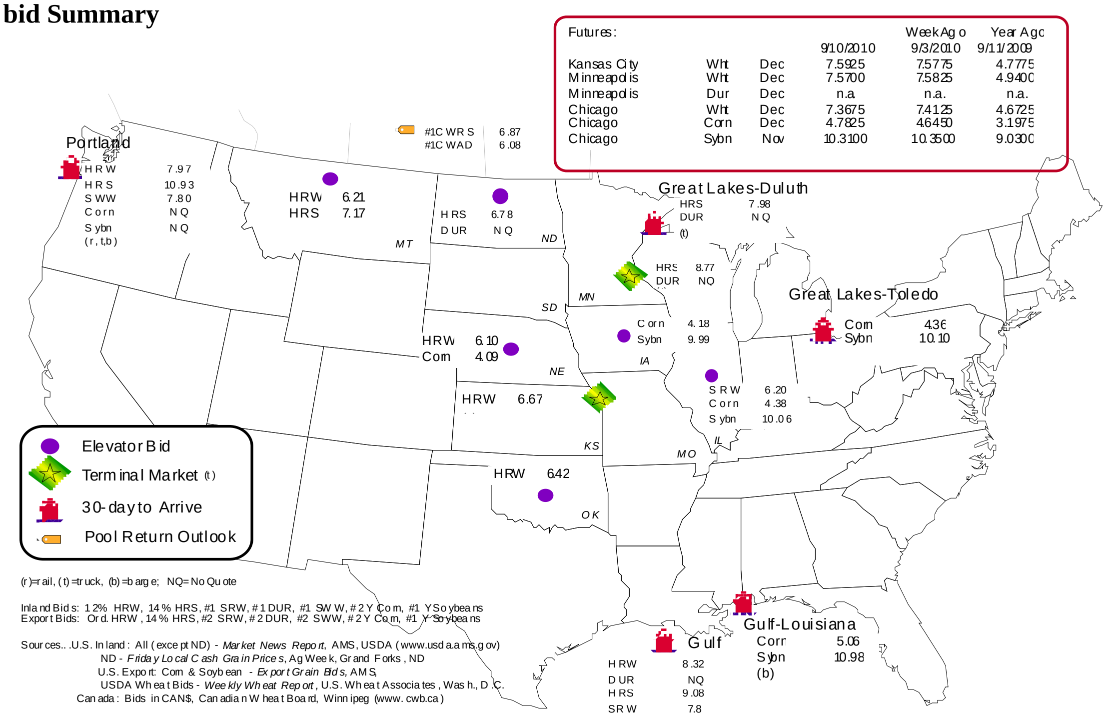
Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1

Grain bid Summary



Rail Transportation

Table 3

Rail Deliveries to Port (carloads)[1]

Week ending	Mississippi Gulf	Texas Gulf	Cross-Border Mexico	Pacific Northwest	Atlantic & East Gulf	Total
9/08/2010[p]	757	2,065	543	2,823	254	6,442
9/01/2010[r]	372	1,925	565	2,664	137	5,663
2010 YTD	11,492	49,606	31,408	118,961	18,839	230,306
2009 YTD	16,228	29,714	27,166	113,152	16,052	202,312
2010 YTD as % of 2009 YTD	71	167	116	105	117	114
Last 4 weeks as % of 2009[2]	139	185	97	103	69	118
Last 4 weeks as % of 4-year avg.[2]	45	84	90	84	44	77
Total 2009	33,423	57,646	36,738	175,965	30,328	334,100
Total 2008	68,768	107,542	37,491	255,852	33,028	502,681

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2009 and prior 4-year average.

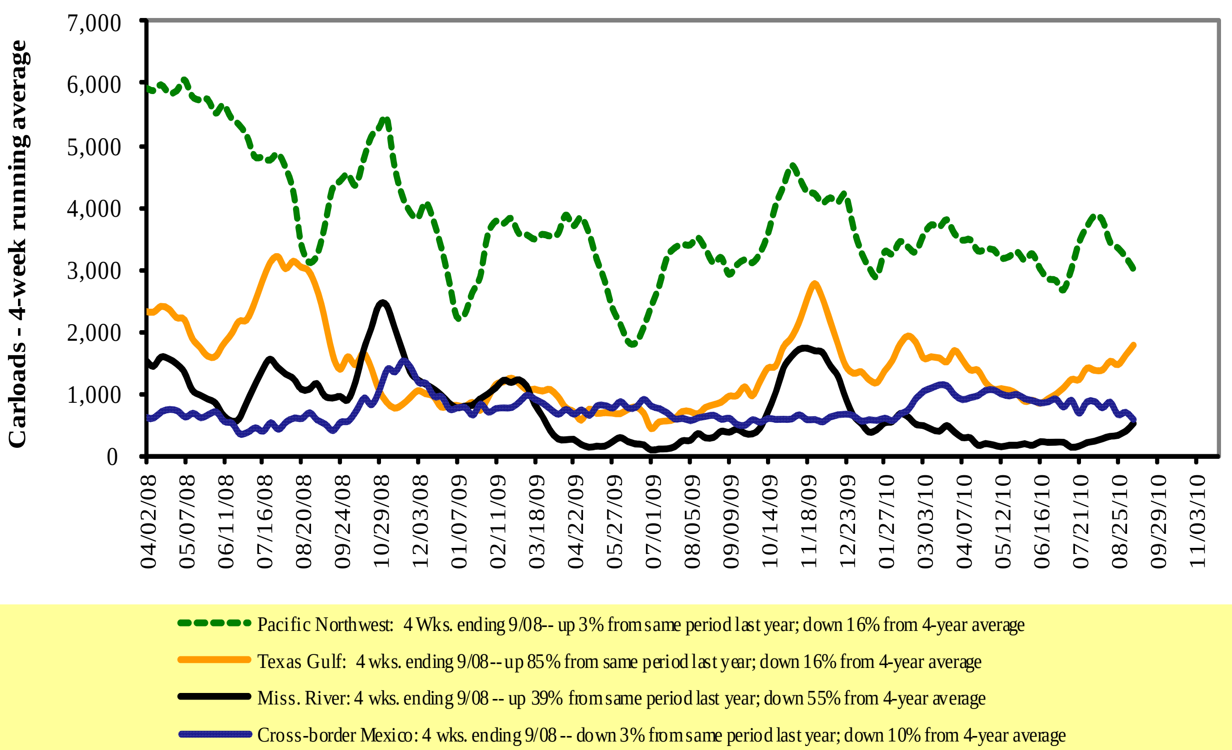
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 35 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

Class I Rail Carrier Grain Car Bulletin (grain carloads originated)

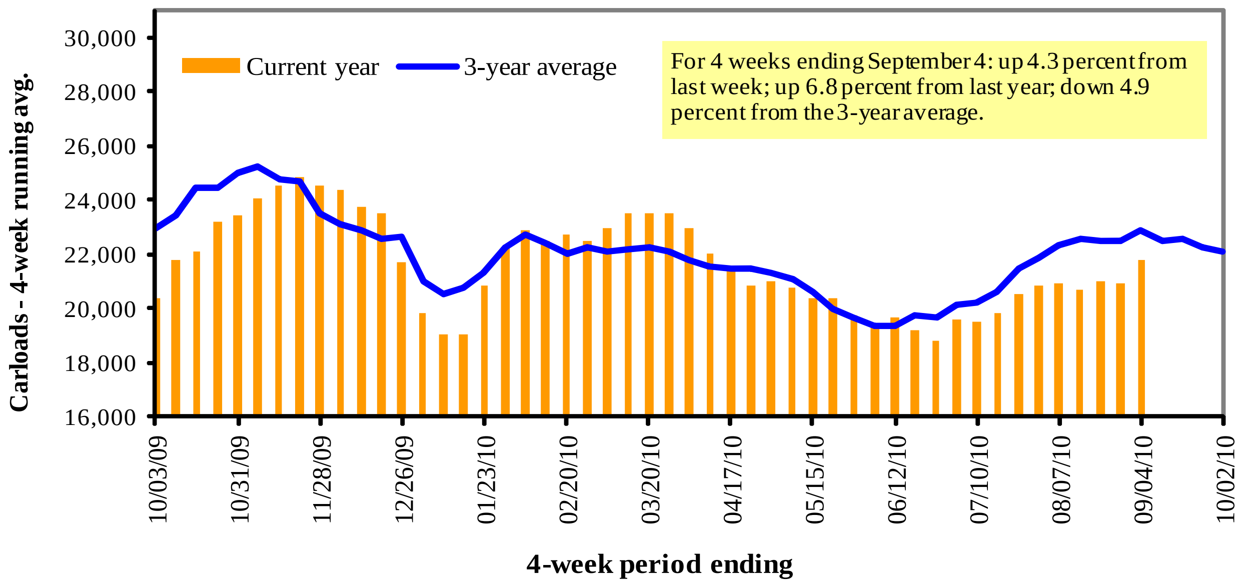
Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
09/04/10	1,399	2,776	13,284	487	6,052	23,998	3,665	6,453
This week last year	1,420	2,416	11,118	661	5,071	20,686	2,841	5,390
2010 YTD	73,317	104,163	355,833	24,374	186,993	744,680	135,109	183,577
2009 YTD	70,621	91,181	305,620	23,245	168,672	659,339	137,373	188,708
2010 YTD as % of 2009 YTD	104	114	116	105	111	113	98	97
Last 4 weeks as % of 2009[1]	100	98	109	79	112	107	94	111
Last 4 weeks as % of 3-yr avg.[1]	78	84	100	78	98	95	86	121
Total 2009	105,278	142,254	483,618	36,912	268,811	1,036,873	200,871	278,997

[1]As a percent of the same period in 2008 and the prior 3-year average. YTD = year-to-date.

Source: Association of American Railroads (www.aar.org)

Figure 3

Total Weekly U.S. Class I Railroad Grain Car Loadings



Source: Association of American Railroads

Table 5

Rail Car Auction Offerings[1] ($/car)[2]

Week ending	Delivery period							
9/11/2010	Sep-10	Sep-09	Oct-10	Oct-09	Nov-10	Nov-09	Dec-10	Dec-09
BNSF[3]								
COT grain units	no offer	1	no offer	no offer	no offer	0	no offer	0
COT grain single-car[5]	no offer	0 . . 3	no offer	no offer	no offer	no bids	no offer	no bids
UP[4]								
GCAS/Region 1	no offer	no bids	no offer	no bids	no offer	no bids	n/a	no offer
GCAS/Region 2	no offer	no bids	no offer	67	161	no bids	n/a	no offer

[1]Auction offerings are for single-car and unit train shipments only.

[2]Average premium/discount to tariff, last auction

[3]BNSF - COT = Certificate of Transportation; north grain and south grain bids were combined effective the week ending 6/24/06.

[4]UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

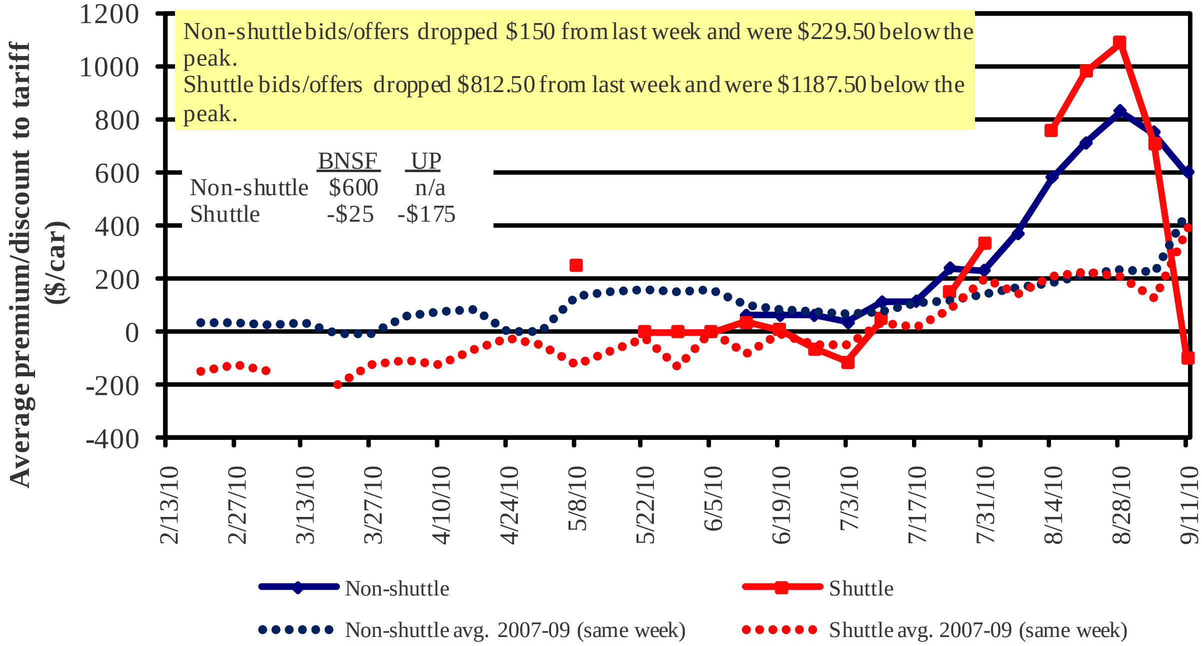
[5]Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4

Bids/Offers for Railcars to be Delivered in September 2010, Secondary Market

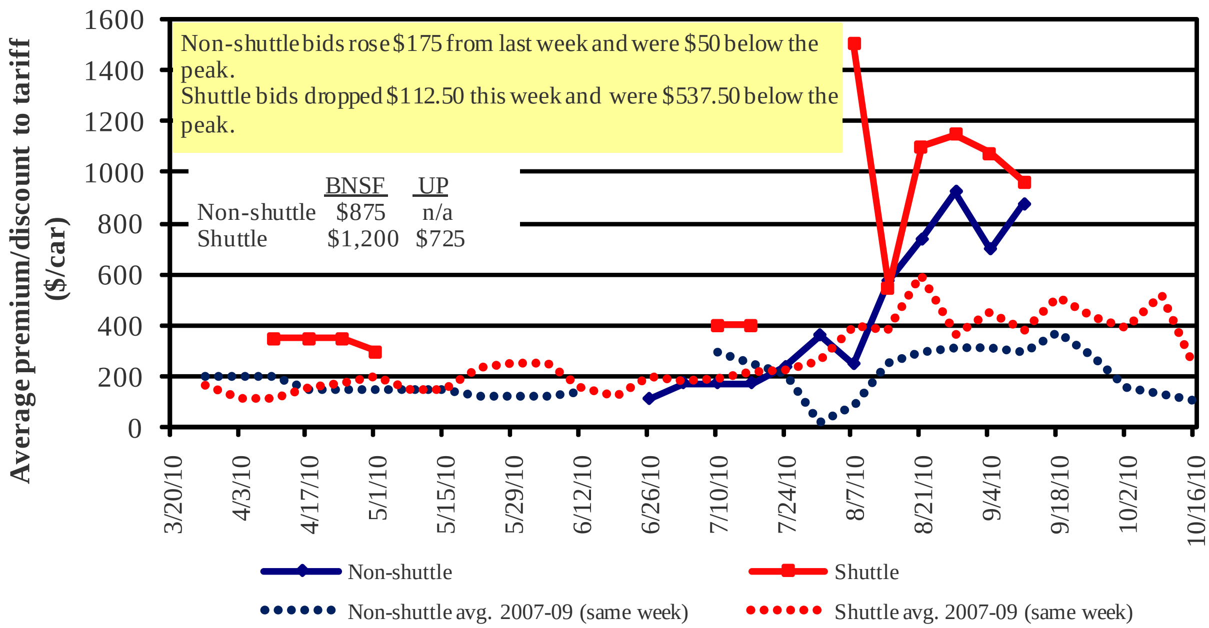


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in October 2010, Secondary Market

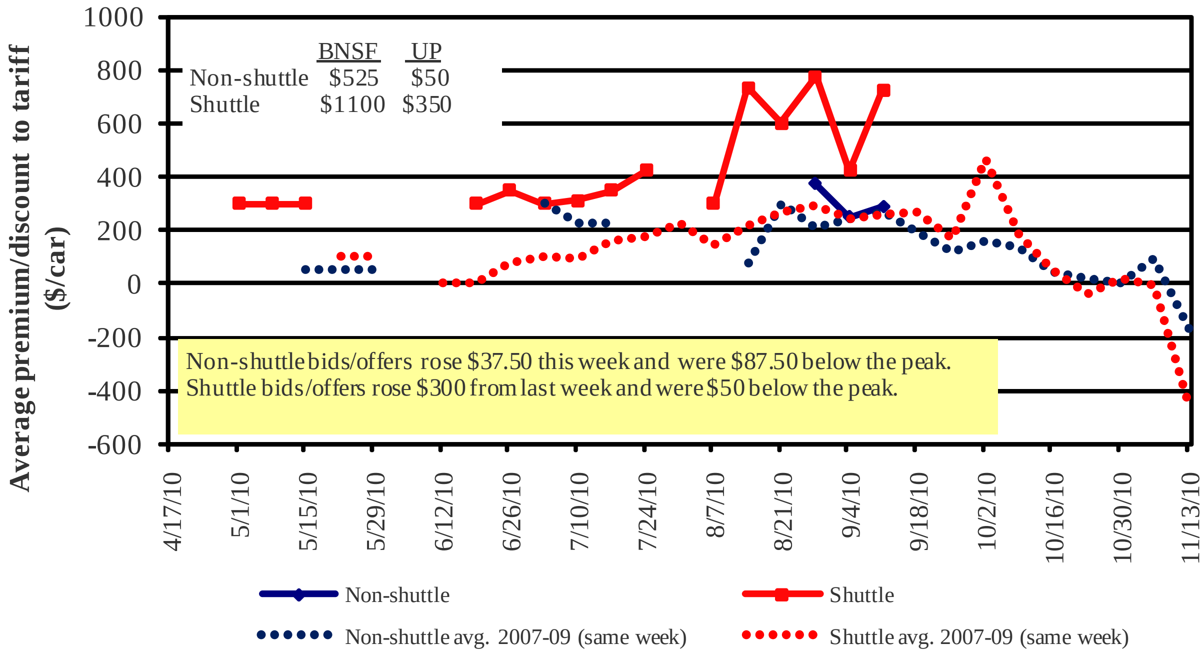


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in November 2010, Secondary Market



Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Table 6

Weekly Secondary Rail Car Market ($/car)[1]

Week ending	Delivery period					
9/11/2010	Sep-10	Oct-10	Nov-10	Dec-10	Jan-10	Feb-10
Non-shuttle						
BNSF-GF	600	875	525	400	n/a	n/a
Change from last week	(150)	375	n/a	n/a	n/a	n/a
Change from same week 2009	615	875	n/a	n/a	n/a	n/a
UP-Pool	n/a	n/a	50	n/a	n/a	n/a
Change from last week	n/a	n/a	(200)	n/a	n/a	n/a
Change from same week 2009	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	(25)	1,200	1,100	n/a	n/a	n/a
Change from last week	(1,050)	(100)	n/a	n/a	n/a	n/a
Change from same week 2009	57	1,012	937	n/a	n/a	n/a
UP-Pool	(175)	725	350	-	n/a	n/a
Change from last week	(575)	(125)	(75)	(150)	n/a	n/a
Change from same week 2009	(25)	362	n/a	n/a	n/a	n/a

[1]Average premium/discount to tariff, $/car-last week

[2]Shuttle bids are a new data series; prior to this we provided only non-shuttle rates.

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,
n/a = not available; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

Data from Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments[1]

Effective date: 9/1/2010	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]
Unit train						
Wheat	South Central KS	St. Louis, MO	$2,774	$86	$28.40	$0.77
	Grand Forks, ND	Duluth-Superior, MN	$2,563	$125	$26.69	$0.73
	South Central KS	Los Angeles, CA	$5,047	$643	$56.50	$1.54
	South Central KS	New Orleans, LA	$3,275	$151	$34.02	$0.93
	Sioux Falls, SD	Galveston-Houston, TX	$4,981	$528	$54.70	$1.49
	Northwest KS	Galveston-Houston, TX	$3,543	$166	$36.83	$1.00
	Amarillo, TX	Los Angeles, CA	$3,742	$231	$39.45	$1.07
Corn	Champaign-Urbana, IL	New Orleans, LA	$2,785	$171	$29.35	$0.80
	Toledo, OH	Raleigh, NC	$3,471	$199	$36.45	$0.99
	Des Moines, IA	Davenport, IA	$1,912	$36	$19.35	$0.53
	Indianapolis, IN	Atlanta, GA	$2,993	$150	$31.21	$0.85
	Indianapolis, IN	Knoxville, TN	$2,557	$96	$26.34	$0.72
	Des Moines, IA	Little Rock, AR	$2,848	$106	$29.34	$0.80
	Des Moines, IA	Los Angeles, CA	$4,263	$310	$45.41	$1.24
Soybeans	Minneapolis, MN	New Orleans, LA	$3,181	$156	$33.14	$0.90
	Toledo, OH	Huntsville, AL	$2,748	$141	$28.69	$0.78
	Indianapolis, IN	Raleigh, NC	$3,540	$201	$37.15	$1.01
	Indianapolis, IN	Huntsville, AL	$2,443	$96	$25.21	$0.69
	Champaign-Urbana, IL	New Orleans, LA	$3,038	$171	$31.87	$0.87
Shuttle Train						
Wheat	Great Falls, MT	Portland, OR	$2,868	$370	$32.15	$0.88
	South Central KS	Galveston-Houston, TX	$2,867	$288	$31.33	$0.85
	Chicago, IL	Albany, NY	$3,811	$187	$39.70	$1.08
	Grand Forks, ND	Portland, OR	$4,131	$638	$47.36	$1.29
	Grand Forks, ND	Galveston-Houston, TX	$5,046	$665	$56.71	$1.54
	Northwest KS	Portland, OR	$4,510	$272	$47.49	$1.29
Corn	Minneapolis, MN	Portland, OR	$3,920	$777	$46.65	$1.27
	Sioux Falls, SD	Tacoma, WA	$3,920	$712	$46.00	$1.25
	Champaign-Urbana, IL	New Orleans, LA	$2,677	$171	$28.28	$0.77
	Lincoln, NE	Galveston-Houston, TX	$2,800	$415	$31.93	$0.87
	Des Moines, IA	Amarillo, TX	$3,230	$134	$33.40	$0.91
	Minneapolis, MN	Tacoma, WA	$3,920	$771	$46.59	$1.27
	Council Bluffs, IA	Stockton, CA	$3,400	$798	$41.68	$1.13
Soybeans	Sioux Falls, SD	Tacoma, WA	$4,320	$712	$49.97	$1.36
	Minneapolis, MN	Portland, OR	$4,270	$777	$50.12	$1.36
	Fargo, ND	Tacoma, WA	$4,270	$633	$48.69	$1.33
	Council Bluffs, IA	New Orleans, LA	$3,410	$197	$35.82	$0.97
	Toledo, OH	Huntsville, AL	$2,366	$141	$24.90	$0.68
	Grand Island, NE	Portland, OR	$4,420	$278	$46.66	$1.27

[1]A unit train refers to shipments of at least 25 cars. Shuttle train rates are available for qualified shipments of 90-110 cars that meet railroad efficiency requirements.

[2]Approximate load per car = 111 short tons (100.7 metric tons): corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

[3]Percentage change year over year calculated using tariff rate plus fuel surchage

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

*Regional economic areas defined by the Bureau of Economic Analysis (BEA)

Table 8

Tariff Rail Rates for U.S. Bulk Grain Shipments to Mexico

Commodity	Origin state	Destination region	Tariff rate/car[1]	Fuel surcharge per car[2]	Tariff plus surcharge per: metric ton[3]	Tariff plus surcharge per: bushel[3]	Percent change Y/Y[4]
Effective date: 9/6/2010							
Wheat	MT	Chihuahua, CI	$6,705	$732	$75.99	$2.07	13
	OK	Cuautitlan, EM	$5,857	$562	$65.58	$1.78	10
	KS	Guadalajara, JA	$6,436	$865	$74.60	$2.03	16
	TX	Salinas Victoria, NL	$3,292	$175	$35.42	$0.96	9
Corn	IA	Guadalajara, JA	$6,670	$808	$76.41	$2.08	9
	SD	Penjamo, GJ	$6,440	$936	$75.36	$2.05	9
	NE	Queretaro, QA	$6,130	$520	$67.95	$1.85	2
	SD	Salinas Victoria, NL	$4,570	$672	$53.56	$1.46	3
	MO	Tlalnepantla, EM	$5,318	$506	$59.51	$1.62	2
	SD	Torreon, CU	$5,330	$766	$62.28	$1.69	7
Soybeans	MO	Bojay (Tula), HG	$6,066	$720	$69.33	$1.89	9
	NE	Guadalajara, JA	$6,550	$789	$74.99	$2.04	10
	IA	Penjamo (Celaya), GJ	$6,690	$948	$78.04	$2.12	10
	KS	Torreon, CU	$5,255	$530	$59.11	$1.61	9
Sorghum	OK	Cuautitlan, EM	$4,339	$671	$51.19	$1.39	4
	TX	Guadalajara, JA	$5,350	$756	$62.39	$1.70	16
	NE	Penjamo, GJ	$6,395	$741	$72.91	$1.98	8
	KS	Queretaro, QA	$5,398	$400	$59.24	$1.61	1
	NE	Salinas Victoria, NL	$4,282	$414	$47.98	$1.30	1
	NE	Torreon, CU	$5,240	$560	$59.26	$1.61	6

[1]Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75--110 cars that meet railroad efficiency requirements.

[2]Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/200

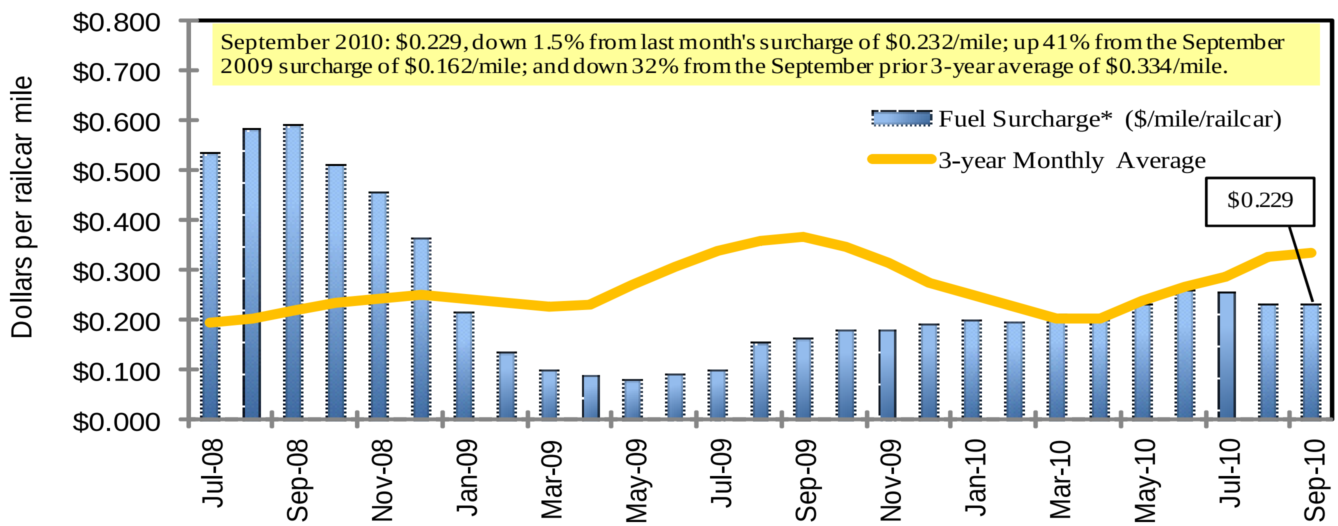
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[4]Percentage change year over year calculated using tariff rate plus fuel surchage

Sources: www.bnsf.com, www.uprr.com, www.kcsouthern.com

Figure 7

Railroad Fuel Surcharges, North American Weighted Average[1]



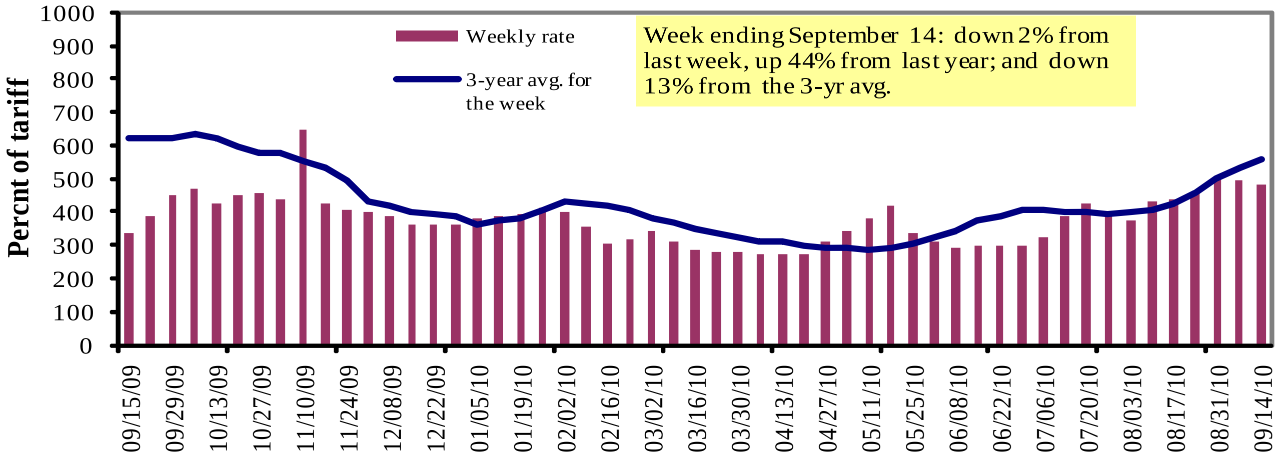
[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.
* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

Barge Transportation

Figure 8

Illinois River Barge Freight Rate[1,2]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	9/14/2010	483	480	484	475	547	547	463
	9/7/2010	506	500	495	506	603	603	488
$/ton	9/14/2010	29.90	25.54	22.46	18.95	25.65	22.10	14.54
	9/7/2010	31.32	26.60	22.97	20.19	28.28	24.36	15.32
Current week % change from the same week:								
	Last year	39	44	44	55	57	59	54
	3-year avg. [2]	-5	-11	-13	-14	-5	-5	-17
Rate[1]	October	592	547	543	517	623	623	503
	December	-	-	419	325	371	371	303

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds.

Source: Transportation & Marketing Programs/AMS/USDA

Calculating barge rate per ton:
(Index * 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map (see figure 9).

Figure 9

Benchmark tariff rates

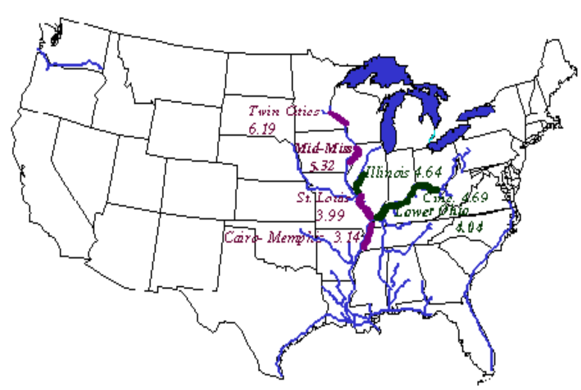
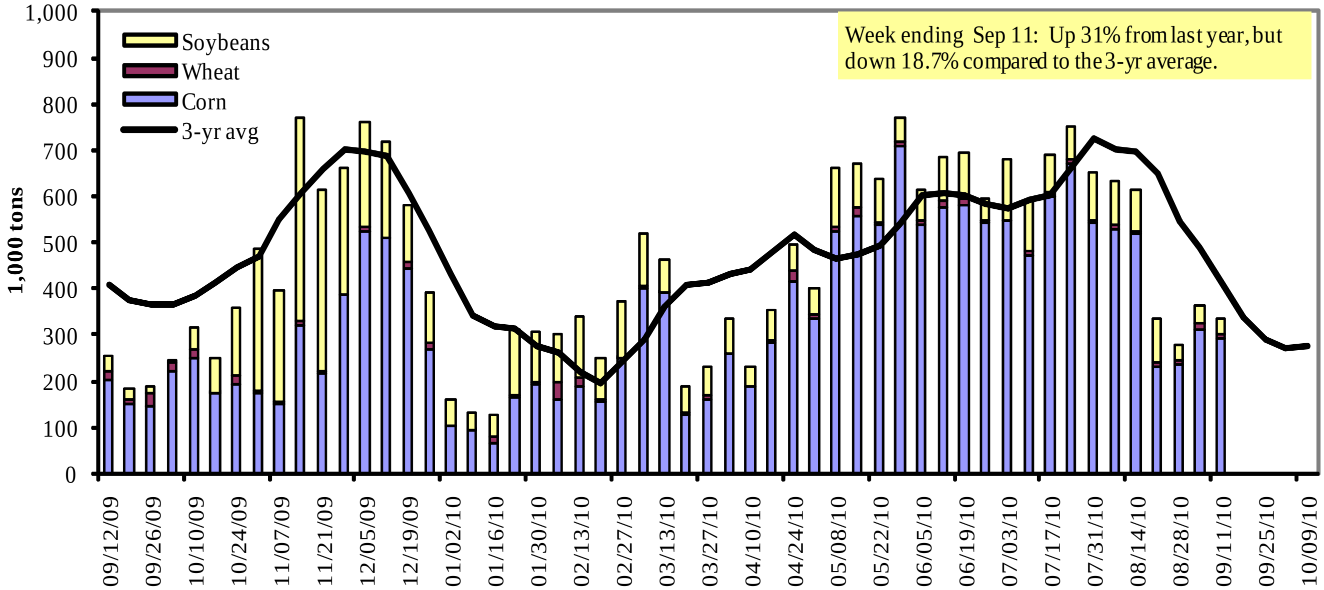


Figure 10

Barge Movements on the Mississippi River[1] (Locks 27 - Granite City, IL)



[1] The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webrpts/default.asp)

Table 10

Barge Grain Movements (1,000 tons)

Week ending 9/11/2010	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	188	11	11	2	212
Winfield, MO (L25)	230	14	26	2	272
Alton, IL (L26)	253	11	30	0	294
Granite City, IL (L27)	294	11	30	6	341
Illinois River (L8)	19	3	8	0	30
Ohio River (L52)	92	9	17	0	118
Arkansas River (L1)	3	18	3	13	36
Weekly total - 2010	389	38	50	19	495
Weekly total - 2009	224	44	42	1	312
2010 YTD[1]	16,970	943	5,383	330	23,627
2009 YTD	17,883	1,116	6,061	283	25,342
2010 as % of 2009 YTD	95	85	89	117	93
Last 4 weeks as % of 2009[2]	83	92	82	311	84
Total 2009	23,424	1,501	10,465	430	35,819

[1] Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

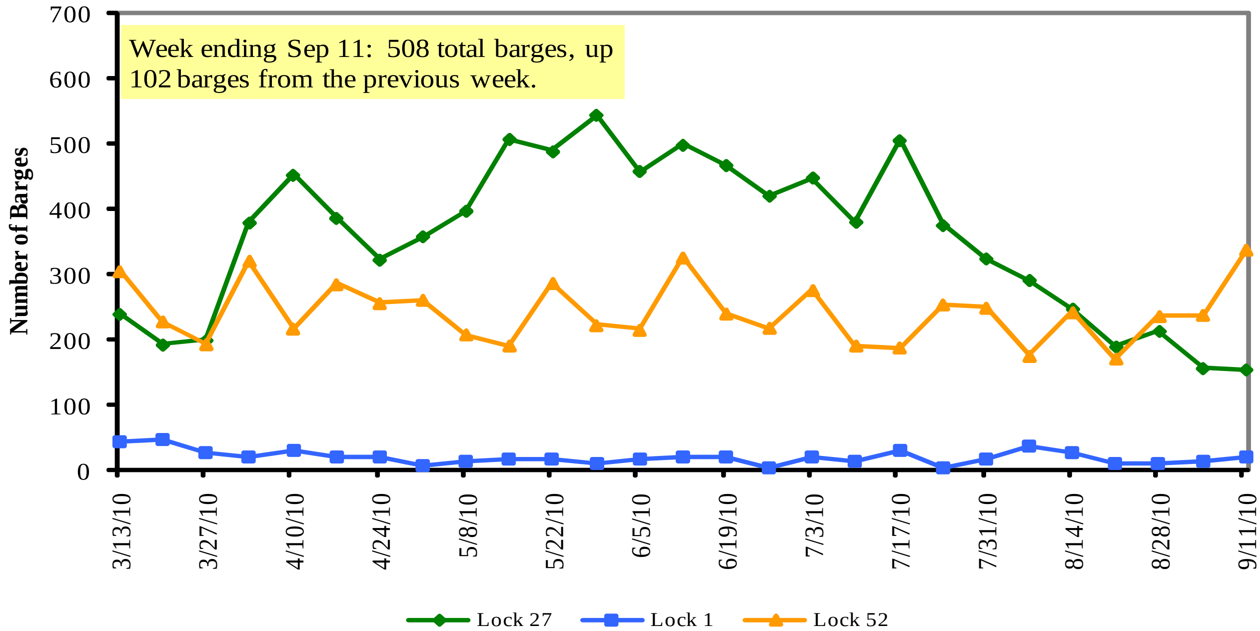
[2] As a percent of same period in 2009.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webrpts/default.asp)

Figure 11

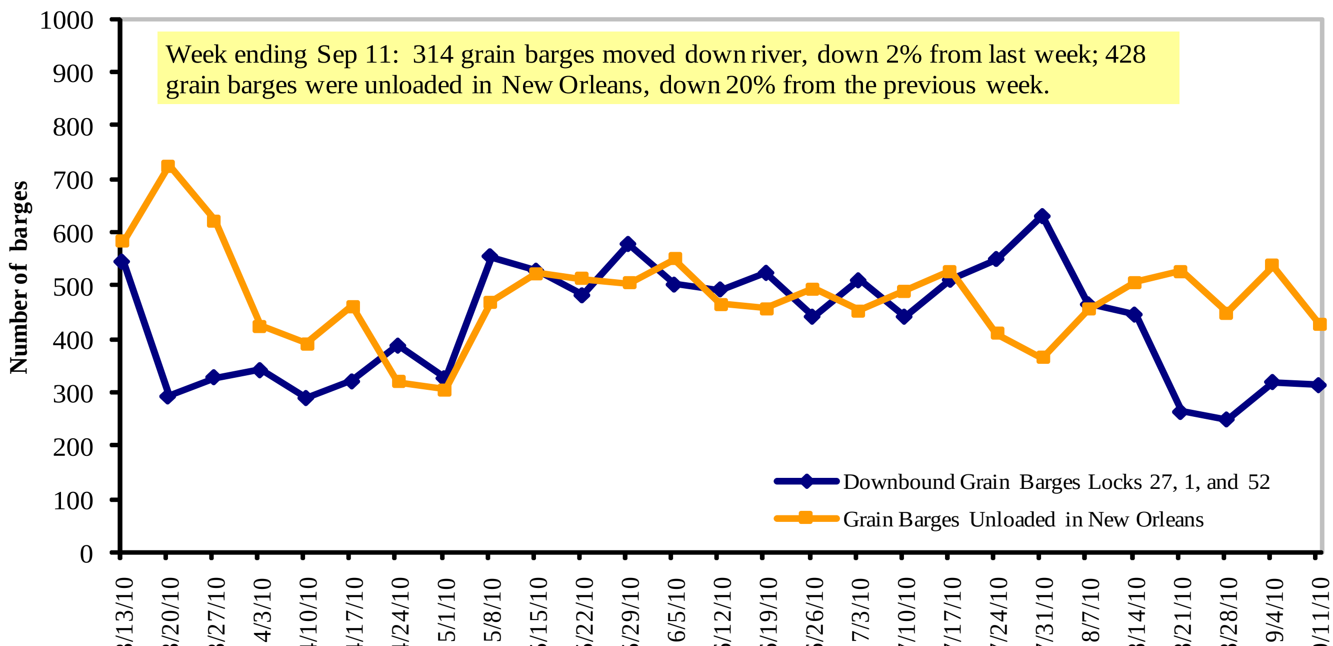
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



Source: U.S. Army Corps of Engineers

Figure 12

Grain Barges for Export in New Orleans Region



Source: U.S. Army Corps of Engineers and GIPSA

Truck Transportation

The **weekly diesel price** provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11

Retail on-Highway Diesel Prices[1], Week Ending 9/13/2010 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.932	0.009	0.282
	New England	2.987	-0.008	0.267
	Central Atlantic	3.019	0.012	0.264
	Lower Atlantic	2.890	0.010	0.291
II	Midwest[2]	2.920	0.020	0.313
III	Gulf Coast[3]	2.887	0.011	0.332
IV	Rocky Mountain	3.031	0.010	0.348
V	West Coast	3.101	-0.003	0.306
	California	3.142	-0.003	0.295
Total	U.S.	2.943	0.012	0.309

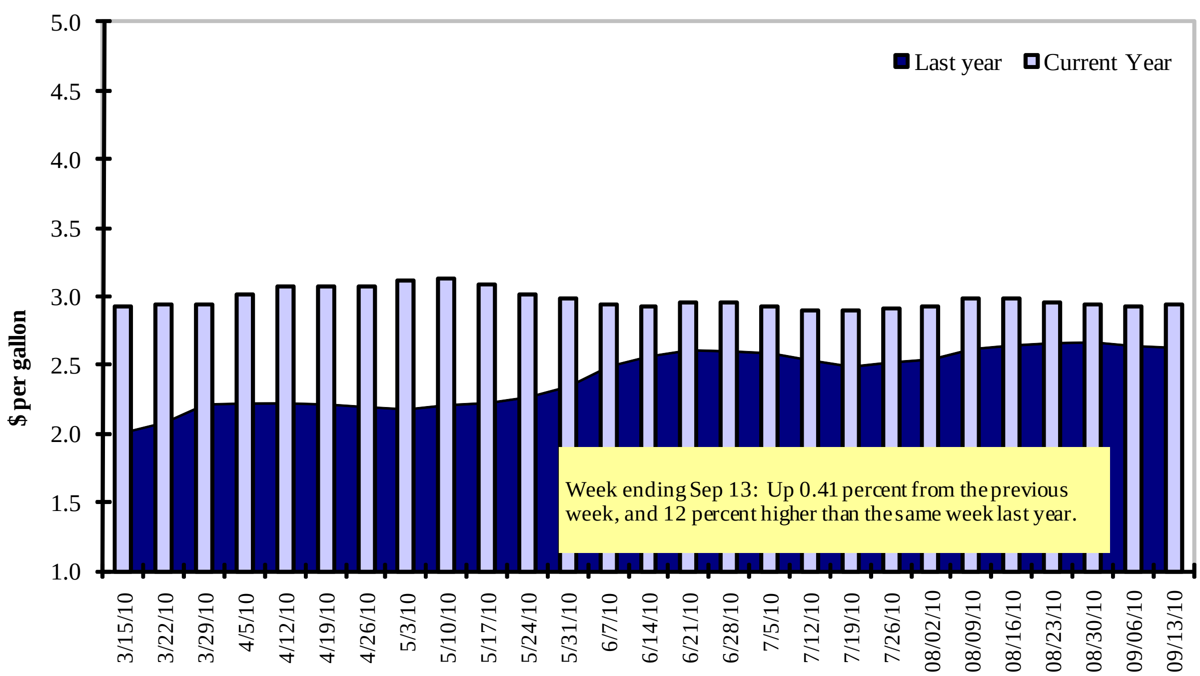
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[2]Same as North Central [3]Same as South Central

Source: Energy Information Administration/U.S. Department of Energy (www.eia.doe.gov)

Figure 13

Weekly Diesel Fuel Prices, U.S. Average



Source: Retail On-Highway Diesel Prices, Energy Information Administration, Dept. of Energy

Grain Exports

Table 12

U.S. Export Balances and Cumulative Exports (1,000 metric tons)

	Wheat						Corn	Soybeans	Total
Week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances[1]									
9/2/2010	3,899	599	2,230	1,341	358	8,426	15,102	17,705	41,233
This week year ago	1,282	870	981	962	275	4,371	12,131	16,947	33,449
Cumulative exports-marketing year[2]									
2010/11 YTD	3,152	541	1,608	1,121	190	6,611	259	81	6,951
2009/10 YTD	1,935	773	1,047	970	189	4,913	537	194	5,644
YTD 2010/11 as % of 2009/10	163	70	154	116	101	135	48	42	123
Last 4 wks as % of same period 2009/10	278	69	209	134	129	180	68	36	66
2009/10 Total	8,458	2,733	5,329	3,897	983	21,400	47,700	39,285	108,385
2008/09 Total	11,244	5,100	5,408	3,420	454	25,626	44,650	33,705	103,981

[1] Current unshipped export sales to date

[2] Shipped export sales to date; the new marketing year now in effect for corn and soybeans

Note: YTD = year-to-date. Marketing Year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Table 13

Top 5 Importers[1] of U.S. Corn

Week ending 09/02/10	**Total Commitments**[2]		**% change**	**Exports**[3]
	2010/11	**2009/10**	**current MY**	
	Current MY	**Last MY**	**from last MY**	**2008/09**
	- 1,000 mt -			- 1,000 mt -
Japan	4,496	2,684	68	15,910
Mexico	2,313	1,903	22	7,454
Korea	889	1,691	(47)	5,129
Taiwan	651	492	32	3,198
Egypt	1,090	618	76	2,233
Top 5 importers	**9,440**	**7,388**	**28**	**33,924**
Total US corn export sales	**15,388**	**12,668**	**21**	**47,180**
% of Projected	29%	25%		
Change from Last Week	4,772	4,851		
Top 5 importers' share of U.S. corn export sales	61%	58%		
USDA forecast, September 2010	**53,340**	**50,290**	**6**	
Corn Use for Ethanol USDA forecast, Ethanol September 2010	**119,380**	**115,189**	**4**	

(n) indicates negative number.

[1]Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

[2]Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.

[3]FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 14

Top 5 Importers[1] of U.S. Soybeans

Week ending 09/02/10	**Total Commitments[2]**		**% change**	**Exports[3]**
	2010/11	**2009/10**	**current MY**	
	Current MY	**Last MY**	**from last MY**	**2008/09**
	- 1,000 mt -			- 1,000 mt -
China	9,118	10,358	(12)	18,681
Mexico	732	568	29	3,098
Japan	628	708	(11)	2,410
EU-25	65	244	(73)	2,180
Taiwan	274	372	(26)	1,592
Top 5 importers	**10,818**	**12,249**	**(12)**	**27,961**
Total US soybean export sales	**17,793**	**17,141**	**4**	**34,930**
% of Projected	44%	42%		
Change from last week	2,477	3,047		
Top 5 importers' share of U.S. soybean export sales	61%	71%		
USDA forecast, September 2010	**40,420**	**40,690**	**(1)**	
Soybean Use for Biodiesel USDA forecast, September 2010	**6,954**	**4,076**	**71**	

(n) indicates negative number.

[1]Based on FAS 2008/09 Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - A

[2] Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.

[3] FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 15

Top 10 Importers[1] of All U.S. Wheat

Week Ending 09/02/2010	**Total Commitments[2]**		**% change**	**Exports[3]**
	2010/11	**2009/10**	**current MY**	
	Current MY	**Last MY**	**from last MY**	**2009/10**
	- 1,000 mt -			- 1,000 mt -
Nigeria	1,507	1,369	10	3,233
Japan	1,545	1,172	32	3,148
Mexico	1,343	798	68	1,975
Philippines	1,166	696	67	1,518
Korea, South	874	524	67	1,111
Taiwan	342	288	19	844
Venezuela	236	197	20	658
Colombia	359	290	24	575
Peru	447	284	57	567
Egypt	1,324	348	281	529
Top 10 importers	**9,143**	**5,964**	**53**	**14,156**
Total US wheat export sales	**15,037**	**9,284**	**62**	**23,980**
% of Projected	44%	39%		
Change from last week	953	546		
Top 10 importers' share of U.S. wheat export sales	61%	64%		
USDA forecast, September 2010	**34,020**	**23,980**	**42**	

(n) indicates negative number.

[1]Based on FAS **2008/09** Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.

[2] Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.

[3] FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 16

Grain Inspections for Export by U.S. Port Region (1,000 metric tons)

Port regions	Week ending 09/09/10	2010 YTD[1]	2009 YTD[1]	2010 YTD as % of 2009 YTD	Last 4-weeks as % of 2009	Last 4-weeks as % of 3-yr. avg.	Total[1] 2009
Pacific Northwest							
Wheat	266	7,601	6,716	113	112	103	10,091
Corn	180	7,911	6,436	123	147	163	8,498
Soybeans	60	5,058	4,596	110	76	82	9,743
Total	**507**	**20,571**	**17,747**	**116**	**122**	**123**	**28,332**
Mississippi Gulf							
Wheat	95	2,727	2,890	94	99	57	4,019
Corn	673	20,899	21,564	97	99	110	28,843
Soybeans	99	10,534	12,124	87	74	113	21,831
Total	**867**	**34,160**	**36,578**	**93**	**92**	**103**	**54,693**
Texas Gulf							
Wheat	333	5,907	3,798	156	204	116	5,735
Corn	26	1,278	1,353	94	54	109	1,968
Soybeans	0	667	472	141	n/a	n/a	2,402
Total	**359**	**7,851**	**5,622**	**140**	**153**	**115**	**10,105**
Great Lakes							
Wheat	119	866	394	220	255	165	990
Corn	0	53	218	24	0	0	353
Soybeans	0	0	69	0	n/a	0	781
Total	**119**	**919**	**682**	**135**	**189**	**138**	**2,124**
Atlantic							
Wheat	0	195	480	41	0	0	552
Corn	0	272	137	199	112	186	472
Soybeans	1	710	469	151	32	15	1,268
Total	**1**	**1,177**	**1,086**	**108**	**30**	**23**	**2,292**
U.S. total from ports[2]							
Wheat	813	17,296	14,278	121	142	100	21,387
Corn	880	30,412	29,707	102	105	121	40,134
Soybeans	160	16,970	17,730	96	74	103	36,025
Total	**1,852**	**64,678**	**61,715**	**105**	**109**	**110**	**97,546**

[1] Includes weekly revisions, some regional totals may not add exactly due to rounding.

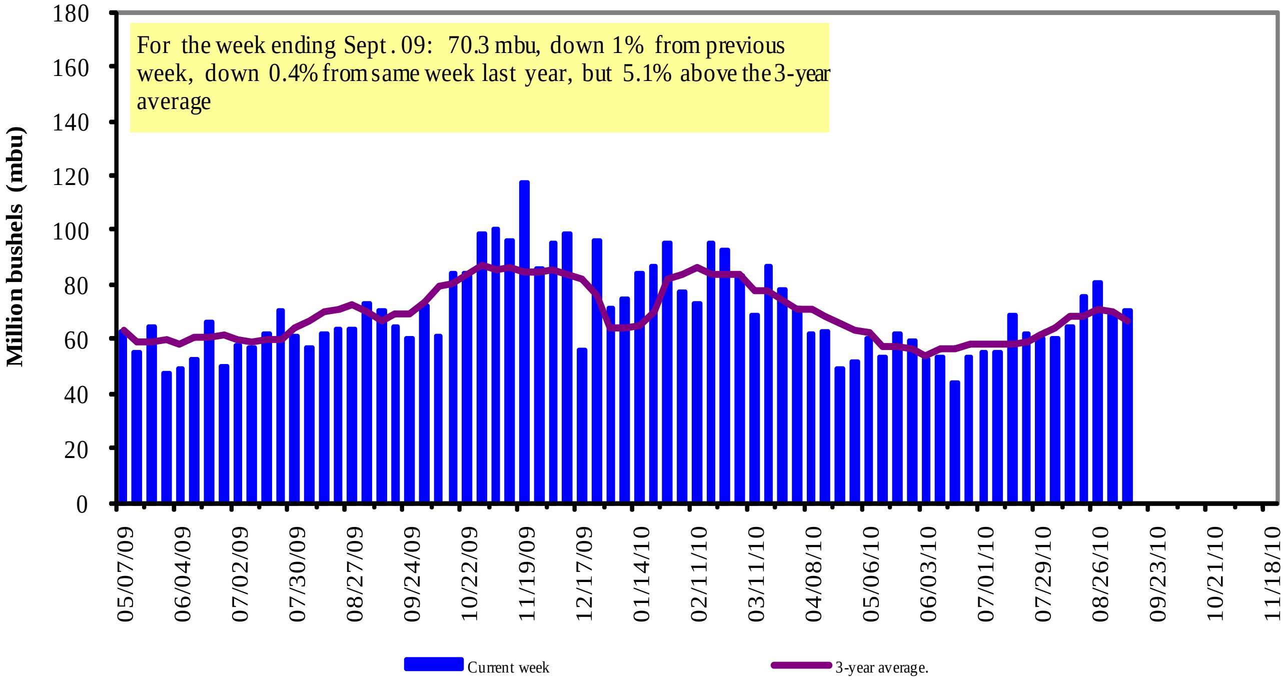
[2] Total includes only port regions shown above

Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); YTD= year-to-date; n/a = not applicable

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 62 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2009.

Figure 14

U.S. grain inspected for export (wheat, corn, and soybeans)

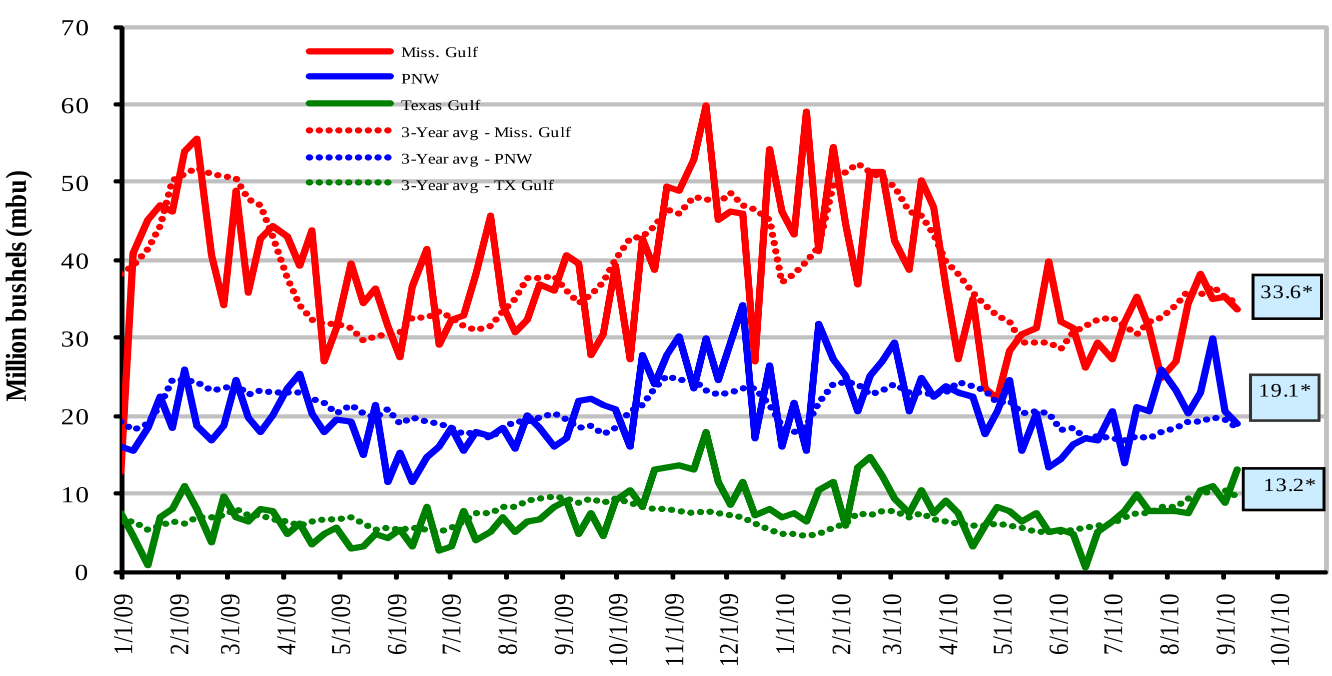


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

Note: 3-year average consists of 4-week running average

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW[1] (wheat, corn, and soybeans)



Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); *mbu, this week.

Sept 9, % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 5	up 50	up 6	down 8
Last year (same week)	down 15	up 179	up 6	up 13
3-yr avg. (4-wk mov. avg.)	down 2	up 39	up 7	up 11

Ocean Transportation

Table 17

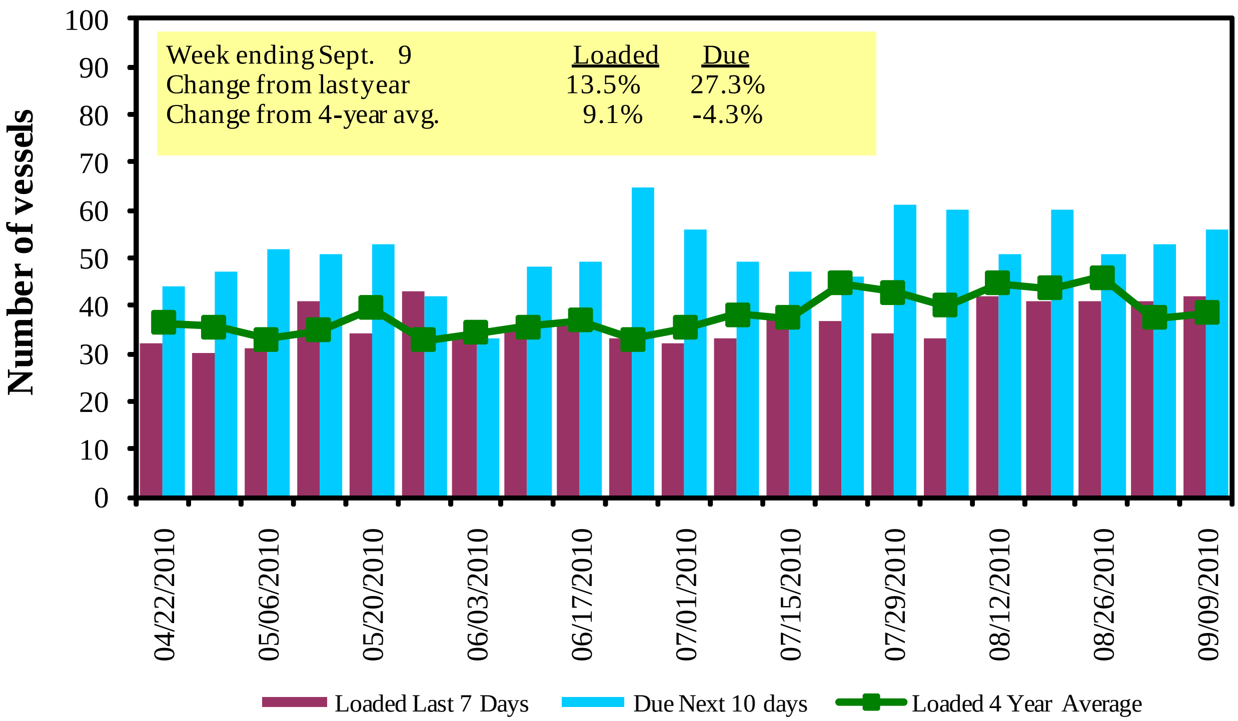
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf In port	Gulf Loaded 7-days	Gulf Due next 10-days	Pacific Northwest In port	Vancouver B.C. In port
9/9/2010	39	42	56	15	9
9/2/2010	50	41	53	11	4
2009 range	(18..72)	(21..57)	(37..86)	(2..19)	(3..19)
2009 avg.	37	39	55	10	9

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

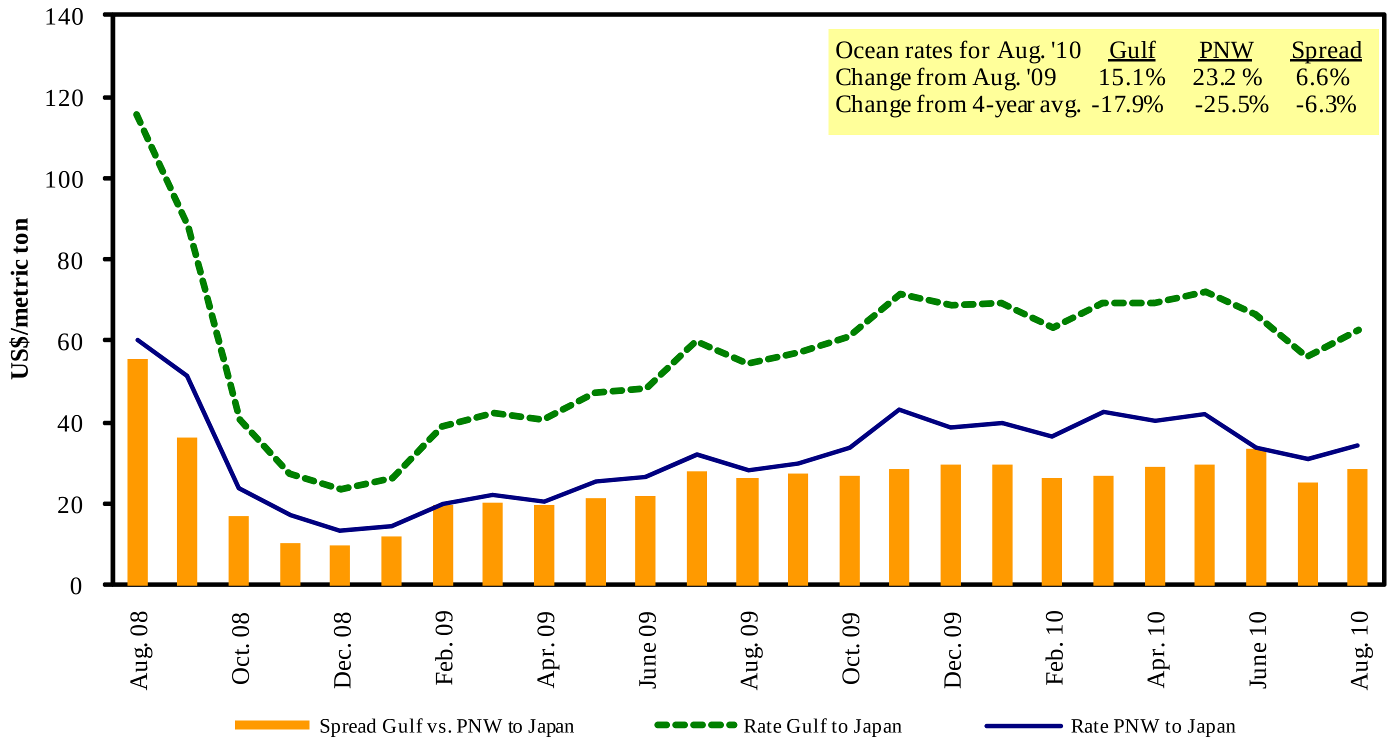
U.S. Gulf[1] Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA
[1]U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 9/11/2010

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	July 15/30	55,000	59.00
U.S. Gulf	China	Heavy Grain	Aug 5/10	55,000	56.00
U.S. Gulf	Egypt Med	Heavy Grain	Sep 5/10	55,000	42.00
U.S. Gulf	South Africa	Wheat	Aug 20/30	25,000	59.50
U.S. Gulf	South Africa	Wheat	Jun 28/30	25,000	57.50
U.S. Gulf	South Africa	Wheat	July 1/10	25,000	56.00
U.S. PNW	Bangladesh[1]	Wheat	Aug 20/30	24,590	92.00
St. Lawrence	Morocco	Wheat	Aug 25/30	25,000	29.75
St. Lawrence	Morocco	Wheat	Jul 26/31	25,000	26.50
Brazil	Spain	Corn	Aug 10/15	25,000	31.50
France	Algeria	Wheat	Jun 25/30	25,000	29.00
France	Algeria	Wheat	Jul 5/10	25,000	25.50
India	China	Grains	Sep 5/10	20,000	27.50
River Plate	Algeria	Soybeanmeal	July 1/10	25,000	56.00

Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

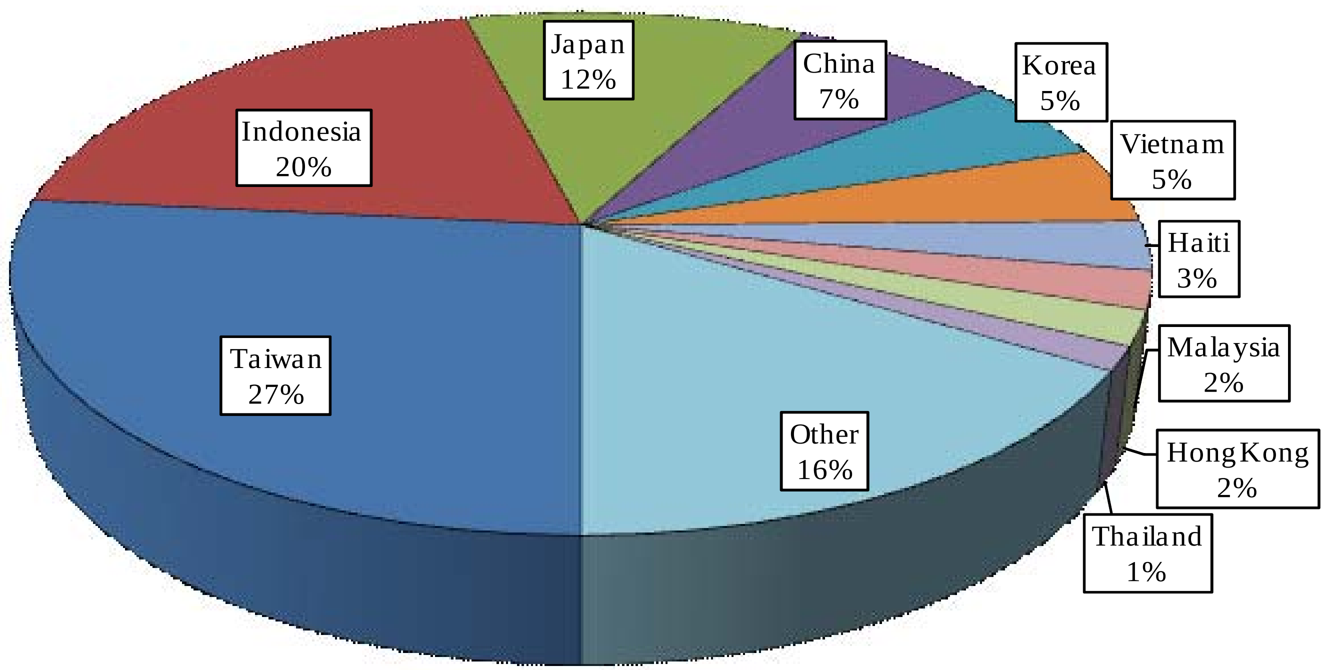
[1]75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

Source: Maritime Research Inc. (www.maritime-research.com)

In 2009, containers were used to transport 5 percent of total waterborne grain exports, and 6 percent of U.S. grain exports to Asia.

Figure 18

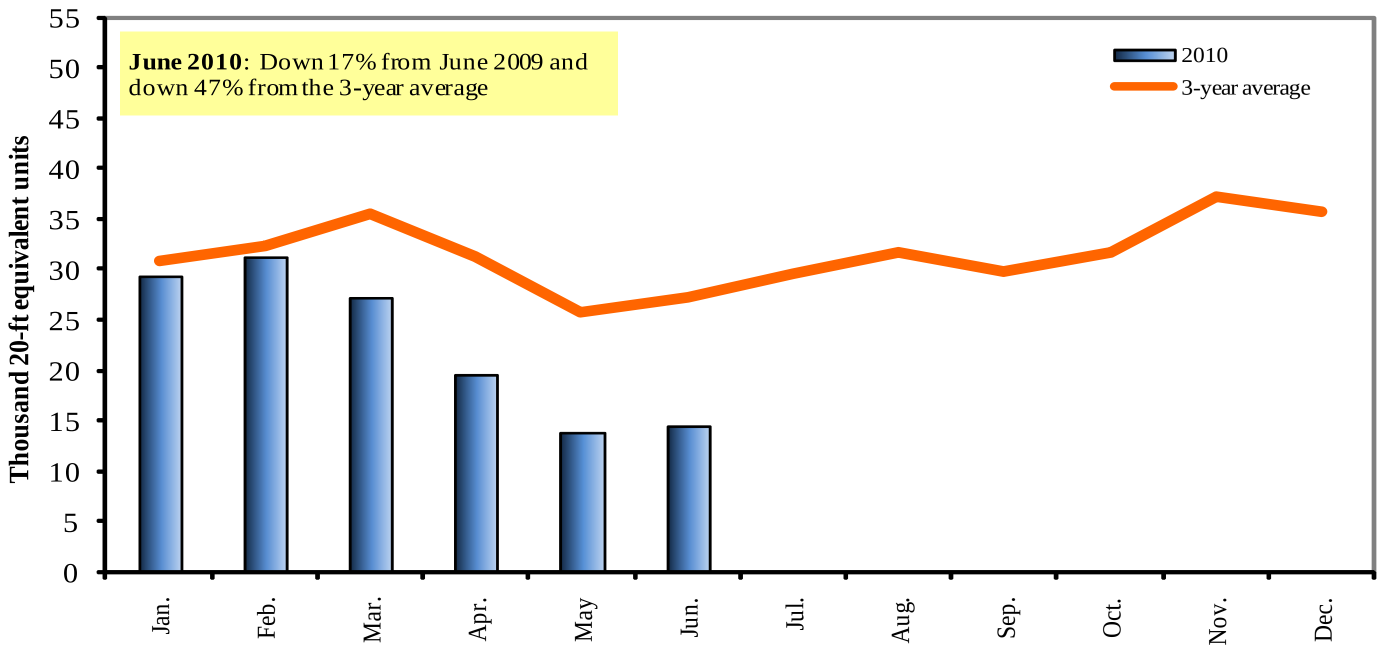
Top 10 Destination Markets for U.S. Containerized Grain Exports, June 2010



Source: Port Import Export Reporting Service (PIERS)

Figure 19

Monthly Shipments of Containerized Grain to Asia



Source: Port Import Export Reporting Service (PIERS), *Journal of Commerce*

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