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Transportation and Marketing Programs/Transportation Services Division
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Contents

The next release is October 7, 2010

WEEKLY HIGHLIGHTS

Corn Harvest Continues Well Ahead of Schedule

As of September 26, the corn harvest is ahead of its normal pace for this time of year, with 27 percent of the corn harvested nationwide compared to the average of 15 percent. In six States, more than half of the corn has been harvested: Tennessee (93 percent), North Carolina (87 percent), Kentucky (80 percent), Texas (64 percent), Kansas (54 percent), and Illinois (57 percent). Texas is behind its normal harvest pace of 73 percent. Two States are approaching the middle of their harvest – Indiana at 46 percent and Missouri at 42 percent. Currently, no major transportation issues are associated with this year's corn harvest. The Nation's soybean harvest is currently 17 percent completed, ahead of the 13 percent average pace.

Corn Inspections Increase; Soybean Inspections Remain Strong

For the week ending September 23, total inspections of grain (corn, wheat, and soybeans) from all major U.S. export regions reached 1.94 million metric tons (mmt), down 2 percent from the past week but 21 percent above the previous year. Corn inspections (.802 mmt) increased 4 percent from the previous week and were 5 percent above last year as shipments to Asia and Egypt rebounded. Soybean inspections (.501 mmt) remained strong, increasing 54 percent from the past week and 151 percent above last year this time, driven by higher shipments to Asia. Although wheat inspections dropped 28 percent from the past week, unshipped balances (Table 12) were above 8.1 mmt, compared to 4.1 mmt last year.

Grain Loading Activity Likely to Pick Up

For the week ending September 23, 63 ocean-going grain vessels are expected to be loaded in the U.S. Gulf, up 7 percent from last year. For the week ending September 26, the down-bound grain movements on the Upper Mississippi river were 593 million tons, up 3 percent from last week and 76 percent higher than last year at this time. Export sales activity has also been strong with net sales of 1.08 million metric tons of soybeans made during the week ending September 16, up 62 percent from the previous week. Wheat export sales of 950,300 metric tons were up 96 percent from the previous week and 7 percent from the prior 4-week average. Strong export sales, increased grain movements down the Mississippi River, and a high number of expected vessels to be loaded indicate increased grain loading activity in the Gulf in the near term.

Third Quarter Panama Canal Water Time Decreased for Booked Transits

According to a report released by Panama Canal Authority on August 15, the average canal transit time (Canal Waters Time) for vessels holding reservations decreased from 14.53 hours to 13.10 hours during April to June, 2010—a 9 percent decrease compared to a year earlier. However, the overall Canal Waters Time for all transits increased by 5.8 percent; and total canal transits declined slightly by 2.8 percent—from 3,576 to 3,476 transits. While there was a decrease in transits of dry bulk, containers, reefers, tankers and passenger vessels, there was an increase in the general cargo and vehicle carrier transits. Such a minor fluctuation in overall transits and tonnage compared to the third quarter of 2009 indicates stability in the canal usage.

Snapshots by Sector

Rail

U.S. railroads originated 23,509 **carloads of grain** during the week ending September 18, up 13 percent from last week, up 9 percent from last year, and 1 percent higher than the 3-year average.

During the week ending September 25, average October non-shuttle **secondary railcar bids/offers** were $338 above tariff, down $233 from last week. Average shuttle rates were $75 below tariff, down $390 from last week.

Ocean

During the week ending September 23, 47 **ocean-going grain vessels** were loaded in the Gulf, up 31 percent from last year. Sixty-three vessels are expected to be loaded in the U.S. Gulf within the next 10 days, up 7 percent from last year.

During the week ending September 24, the cost of shipping grain from the Gulf to Japan averaged $64 per mt, down 2 percent from the previous week. The rate from the Pacific Northwest to Japan was $34 per mt, down 3 percent from the previous week.

Barge

During the week ending Sep 25, **barge grain movements** totaled 593,389 tons, 29percent higher than the previous week and 76 percent higher than the same period last year.

Fuel

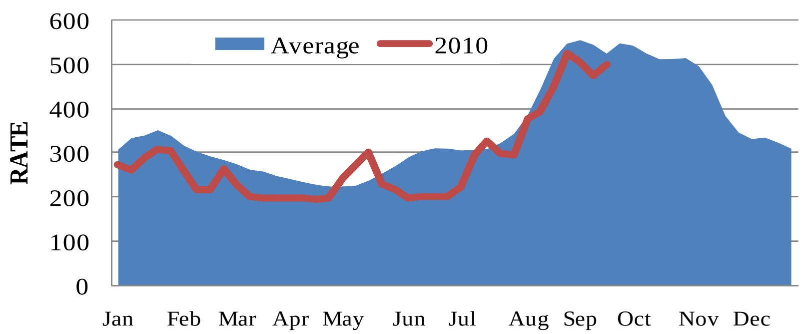
During the week ending Sep 27, U.S. average **diesel fuel prices** decreased 1 cent per gallon to $2.95—0.3 percent lower than the previous week, but 13 percent higher than the same week last year.

Feature Article/Calendar

Fall Grain Barge Situation

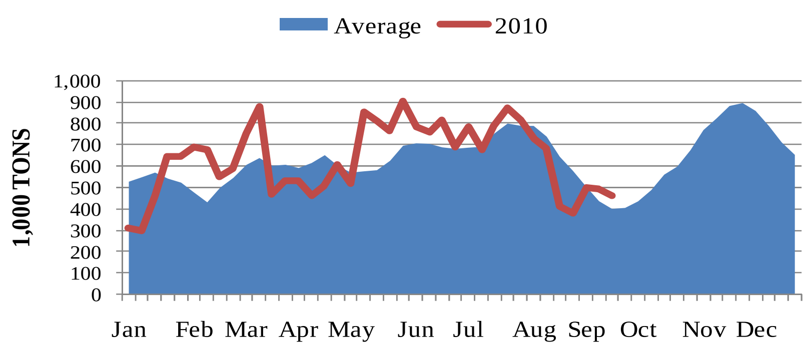
The Midwest has experienced periods of heavy rainfall this summer, which has caused several high-water incidents on the Mississippi River. Under these conditions, barge companies incur additional operating costs to move barges in the faster currents. Travel times are increased, more fuel and labor are required, and loading operations may be impaired. Generally, these events cause freight rates to increase. For most of 2010, however, barge rates have been slightly below average despite the higher operating costs. Figure 1 below shows the weekly barge rate for shipping grain from St. Louis to New Orleans.[1]

Figure 1- Weekly St. Louis Barge Rates, 3-yr. Average and 2010



Source: USDA-AMS-TMP-TSD

Figure 2 - Weekly Grain Barge Shipments, 3-yr. Average and 2010



Source: U.S. Army Corps of Engineers

Rates briefly increased above average during May and July in response to market conditions, which were unrelated to high water situations. A decreased demand for barge services for non-grain commodities, such as steel or cement, has increased the availability of grain barges. This has helped keep grain barge rates at or below average levels.

Weekly barge volumes have been above average for most of the year (see figure 2).[2] This is unexpectedly good news, as the barge industry has been operating under less than ideal navigation conditions. For example, the Mississippi River at St. Louis has been at flood stage several times this year. During these conditions, the barge industry was subject to tow size and daylight-only operating restrictions that could have potentially reduced the amount of river traffic.

With expectations for record corn and soybean crops, barge operators can anticipate a larger than usual surge in demand this fall. This is certainly a possibility given the prospects for a significant increase in foreign demand for U.S. grains. In addition, this year's corn crop was planted early, and expectations for an early harvest and large crop increased the potential for significant increases in barge movements.

However, with the anticipated increase in demand for barge service, freight rates have not experienced significant increases; the barge supply has been adequate to handle market requirements. The barge industry could face some challenges in mid-October as export activity could become quite active and require the barge industry to efficiently deliver loaded barges and quickly return empties to major

[1] Barge rates are expressed as a percent of a tariff benchmark. A 500 percent tariff for St. Louis barge grain would be 5.00 times the St. Louis benchmark rate of $3.99, or $19.95 per ton (2,000 pounds).

[2] Barge movements are measured by the amounts of grain transiting Mississippi River Locks 27, Ohio River Locks and Dam 52, and Norrell Lock and Dam on the Arkansas River.

productions areas. As a result, October barge rates are expected to be at 520 percent of tariff for St. Louis, considerably higher than the average October 2009 rate of 383 percent. If periods of continuous rainfall occur in the Midwest this season, barge service could be impacted by delayed harvest activities and continued high water conditions hampering the efficiency of barge movements.
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Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail[2]	Barge	Ocean	
Week ending				Gulf	Pacific
09/29/10	198	433	311	286	241
09/22/10	199	666	303	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	9/24/2010	9/17/2010
Corn	IL--Gulf	-0.70	-0.73
Corn	NE--Gulf	-1.02	-1.02
Soybean	IA--Gulf	-1.20	-1.23
HRW	KS--Gulf	-1.87	-1.67
HRS	ND--Portland	-3.73	-4.28

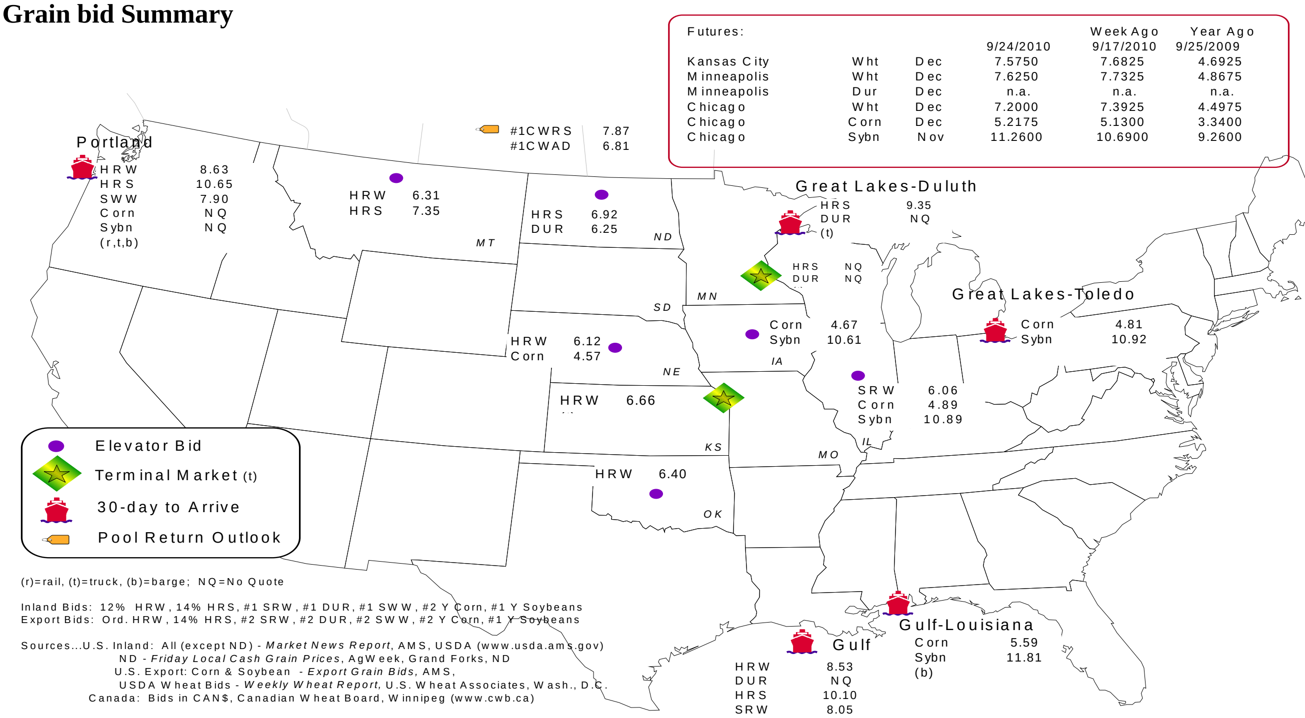
Note: nq = no quote

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
9/22/2010[p]	1,288	1,370	581	1,155	409	4,803
9/15/2010[r]	884	2,773	936	1,305	174	6,072
2010 YTD	13,664	54,184	32,925	121,421	19,422	241,616
2009 YTD	16,742	32,223	28,186	119,675	16,587	213,413
2010 YTD as % of 2009 YTD	82	168	117	101	117	113
Last 4 weeks as % of 2009[2]	237	193	129	63	82	108
Last 4 weeks as % of 4-year avg.[2]	64	104	88	55	48	71
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.

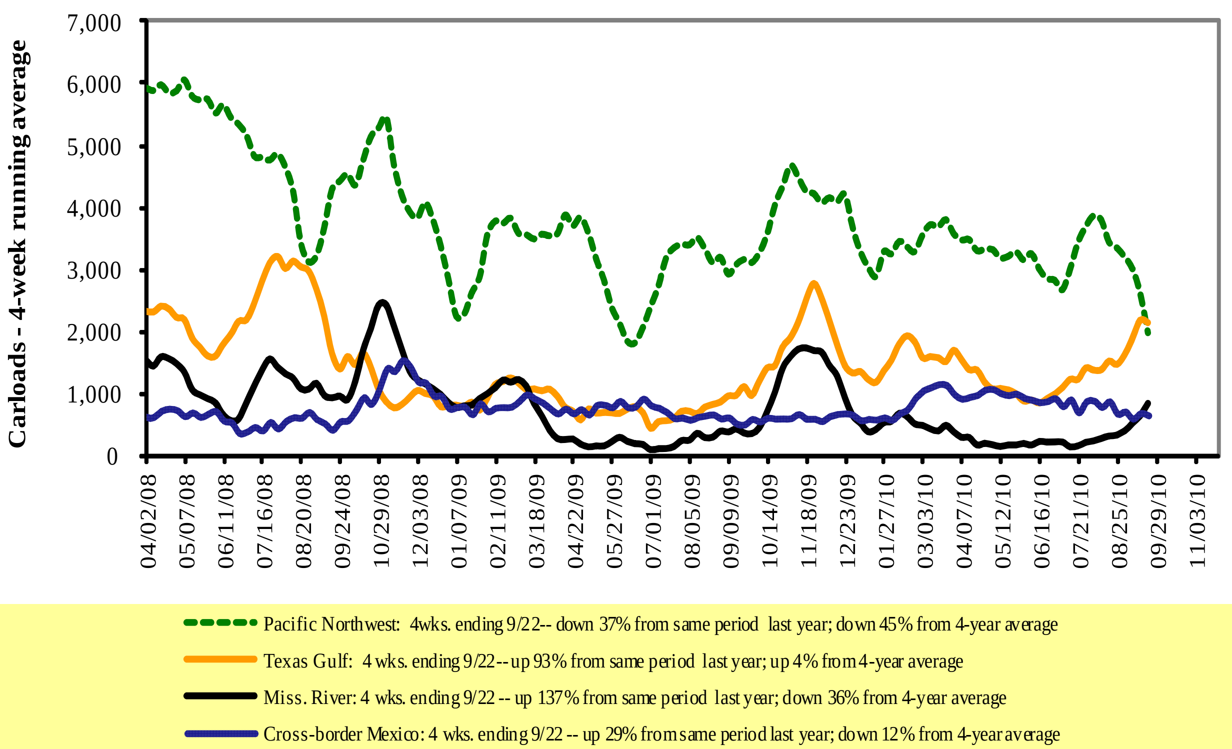
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)

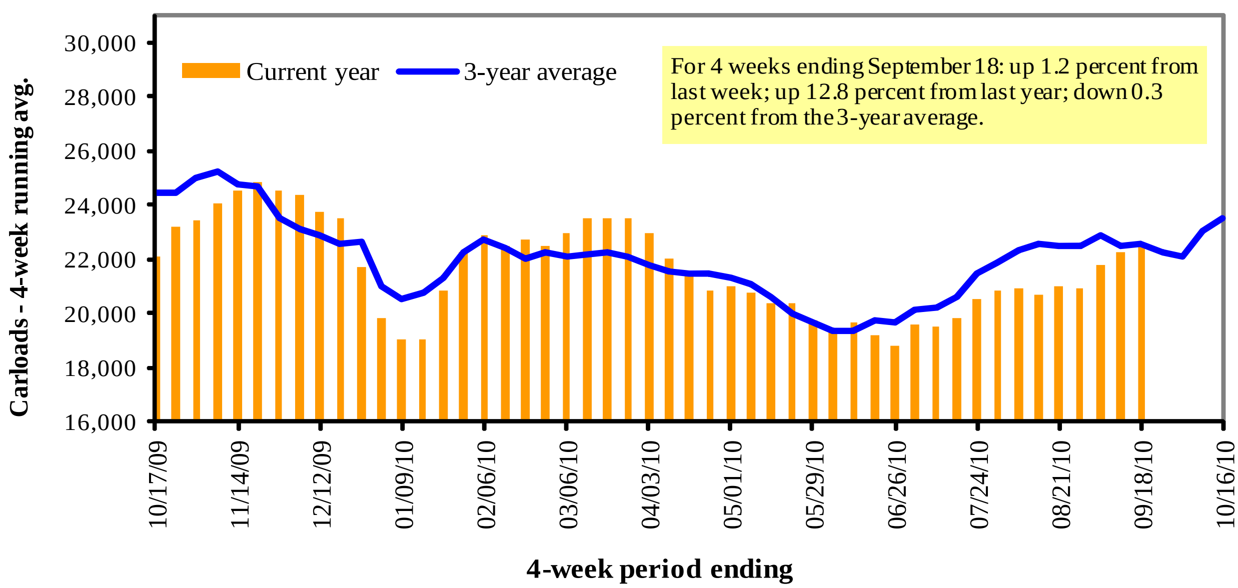
Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
09/18/10	2,129	3,357	11,499	572	5,952	23,509	3,659	4,330
This week last year	1,258	2,293	11,582	711	5,738	21,582	2,868	5,707
2010 YTD	76,686	109,581	377,614	25,350	199,727	788,958	142,190	191,450
2009 YTD	72,813	95,655	327,336	24,465	178,339	698,608	143,056	199,580
2010 YTD as % of 2009 YTD	105	115	115	104	112	113	99	96
Last 4 weeks as % of 2009[1]	118	112	106	95	129	113	108	93
Last 4 weeks as % of 3-yr avg.[1]	93	94	98	88	108	100	85	98
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							
9/25/2010	Oct-10	Oct-09	Nov-10	Nov-09	Dec-10	Dec-09	Jan-11	Jan-10
BNSF[3]								
COT grain units	no offer	no offer	no offer	6	no offer	0	187	0
COT grain single-car[5]	no offer	no offer	no offer	0	no offer	0	no offer	0
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 offer	no bids	no bids	no bids	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.

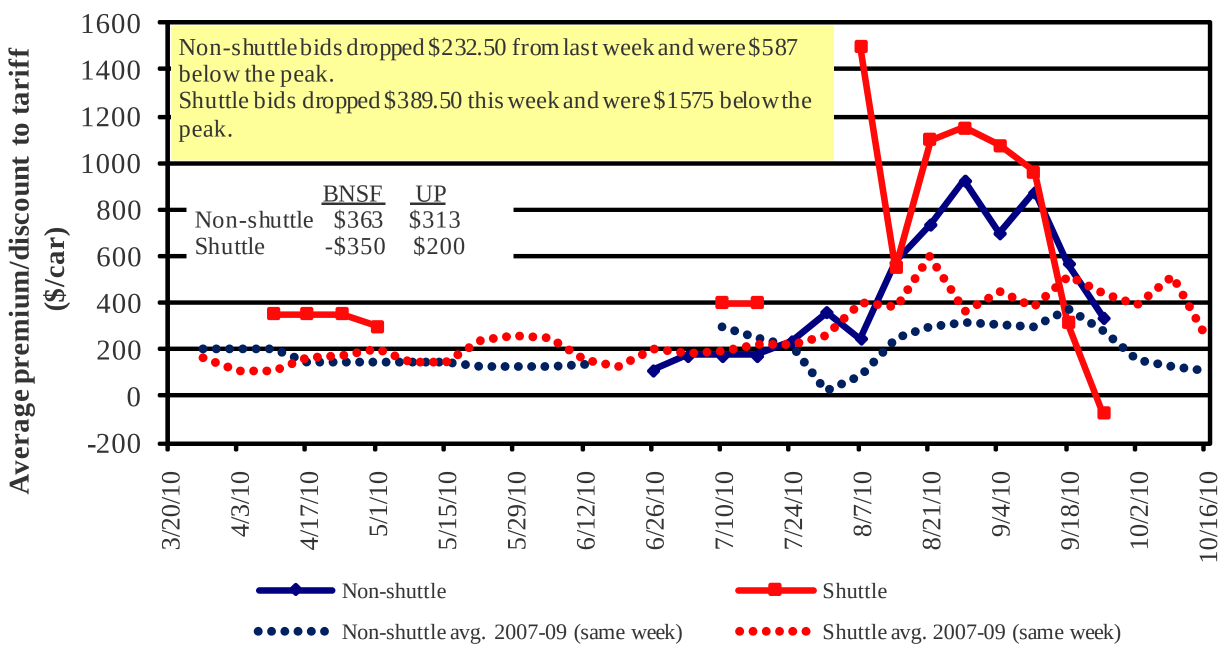
[5]Range is shown because average is not available. Not available = n/a.

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 October 2010, Secondary Market

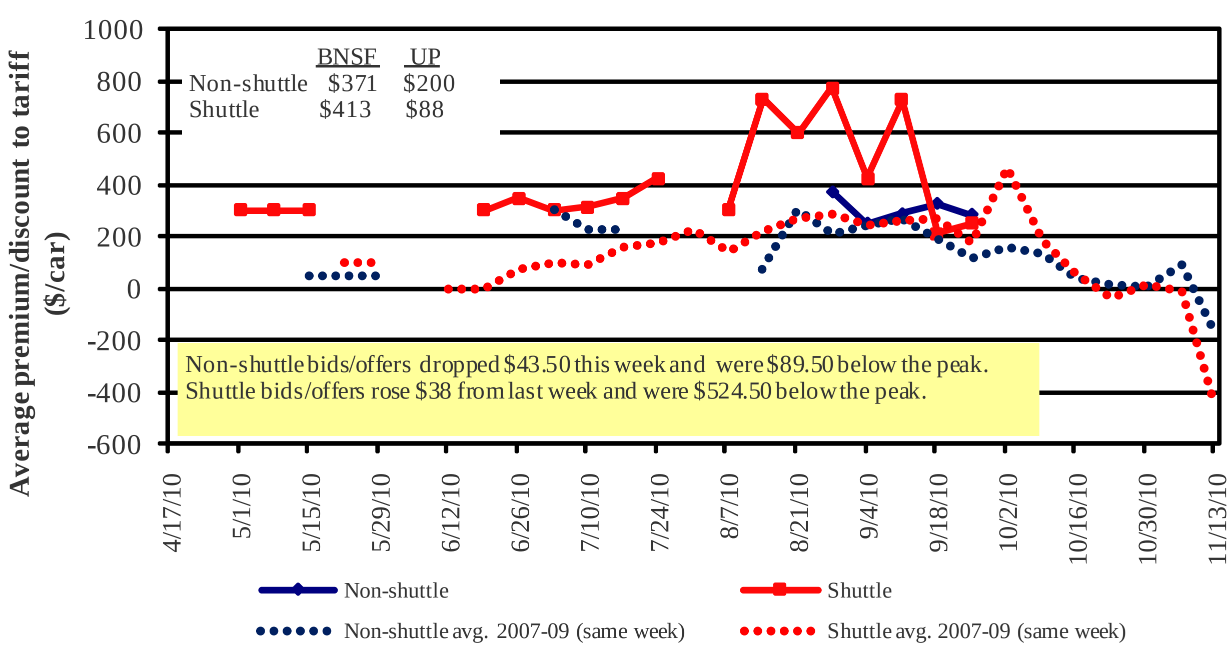


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

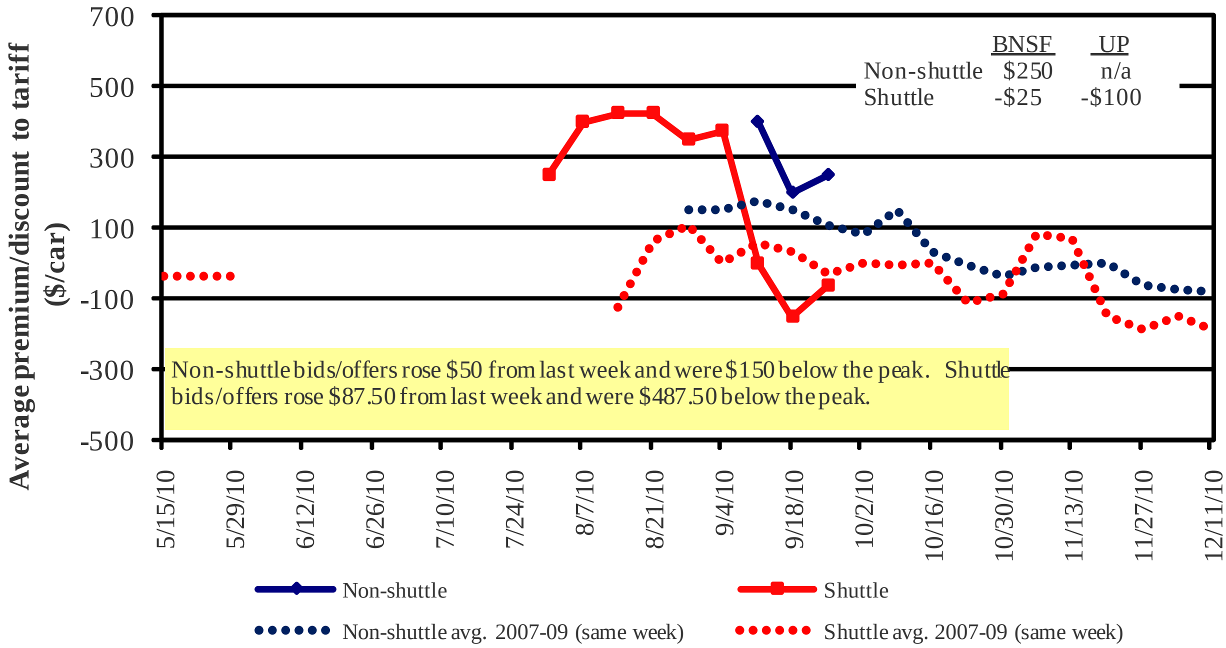


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in December 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					
9/25/2010	Oct-10	Nov-10	Dec-10	Jan-10	Feb-10	Mar-10
Non-shuttle						
BNSF-GF	363	371	250	n/a	n/a	n/a
Change from last week	(420)	(62)	50	n/a	n/a	n/a
Change from same week 2009	259	n/a	250	n/a	n/a	n/a
UP-Pool	313	200	n/a	n/a	n/a	n/a
Change from last week	(45)	(25)	n/a	n/a	n/a	n/a
Change from same week 2009	138	(100)	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	(350)	413	(25)	n/a	n/a	n/a
Change from last week	(729)	13	175	n/a	n/a	n/a
Change from same week 2009	(629)	175	(42)	n/a	n/a	n/a
UP-Pool	200	88	(100)	n/a	n/a	n/a
Change from last week	(50)	63	-	n/a	n/a	n/a
Change from same week 2009	(150)	n/a	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

Effective date: 9/6/2010				**Fuel**			**Percent**
	Origin		**Tariff**	**surcharge**	**Tariff plus surcharge per:**		**change**
Commodity	**state**	**Destination region**	**rate/car**[1]	**per car**[2]	**metric ton**[3]	**bushel**[3]	**Y/Y**[4]
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

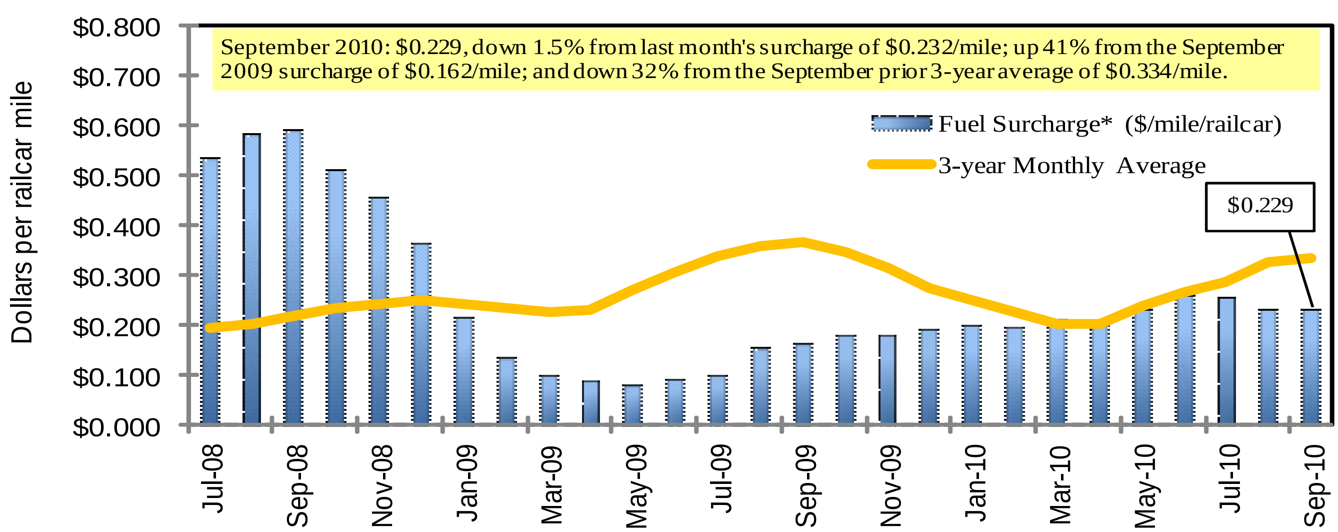
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[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.

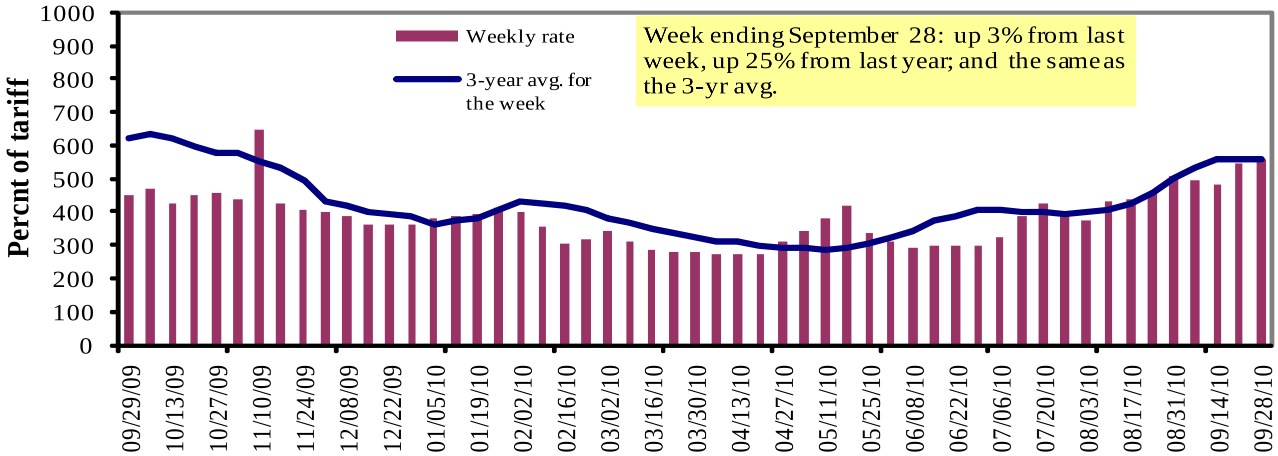
* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

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]	9/28/2010	554	536	559	498	585	585	463
	9/21/2010	531	523	545	500	588	588	466
$/ton	9/28/2010	34.29	28.52	25.94	19.87	27.44	23.63	14.54
	9/21/2010	32.87	27.82	25.29	19.95	27.58	23.76	14.63
Current week % change from the same week:								
	Last year	28	23	25	21	31	31	23
	3-year avg. [2]	4	-2	0	-5	1	1	-9
Rate[1]	October	583	544	544	481	569	569	444
	December	-	-	405	320	366	366	311

[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

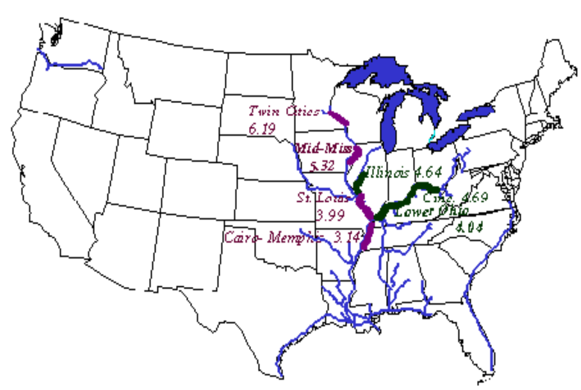
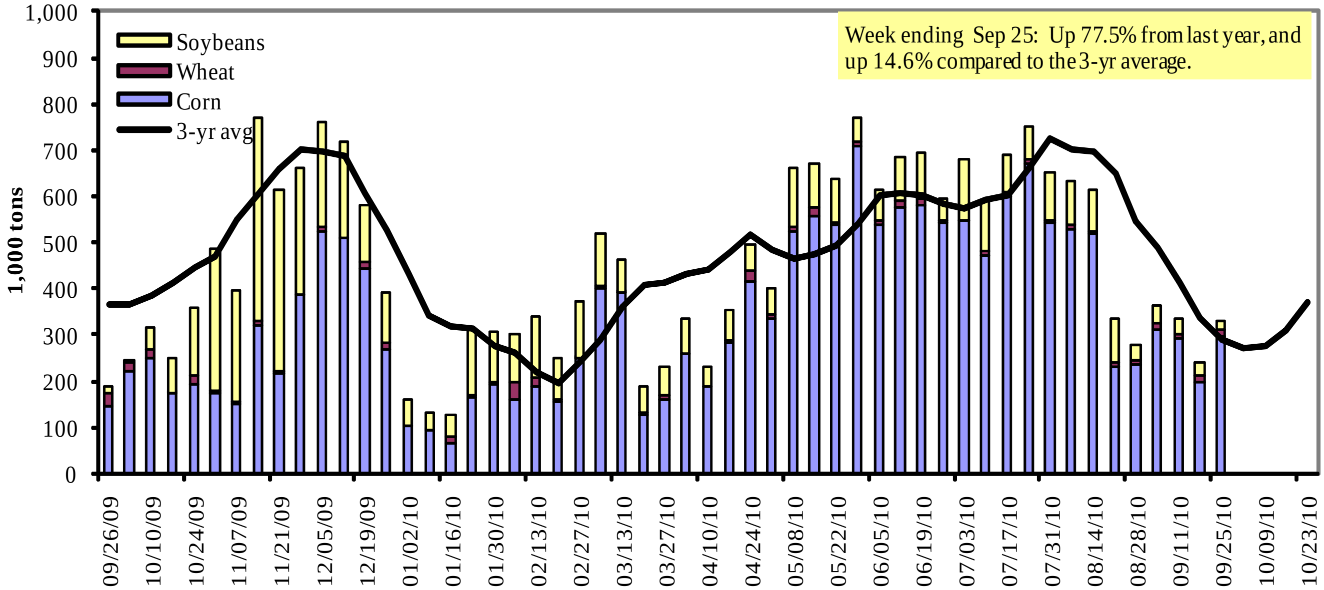


Figure 10

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 9/25/2010	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	67	3	3	0	73
Winfield, MO (L25)	133	13	11	0	157
Alton, IL (L26)	266	9	18	0	293
Granite City, IL (L27)	298	13	21	0	331
Illinois River (L8)	102	0	3	0	105
Ohio River (L52)	174	4	50	0	228
Arkansas River (L1)	6	13	15	2	35
Weekly total - 2010	477	29	86	2	593
Weekly total - 2009	260	55	16	6	337
2010 YTD[1]	17,814	1,003	5,518	345	24,680
2009 YTD	18,304	1,215	6,116	289	25,924
2010 as % of 2009 YTD	97	83	90	119	95
Last 4 weeks as % of 2009[2]	175	69	156	399	161
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.

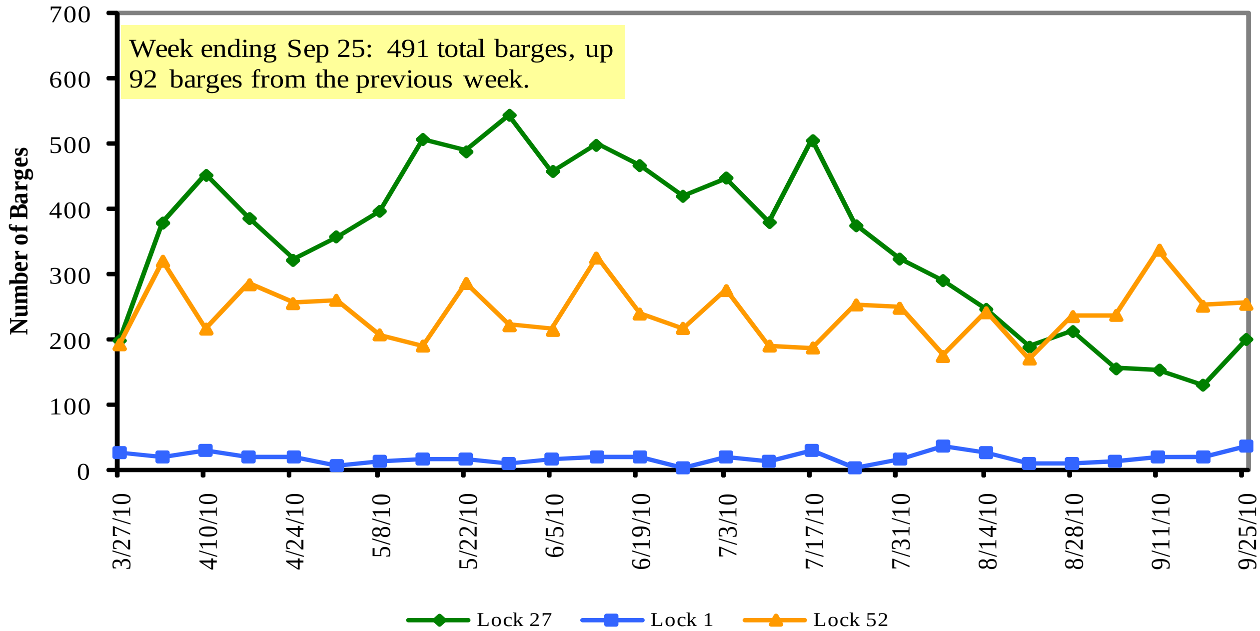
[2] As a percent of same period in 2009.

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

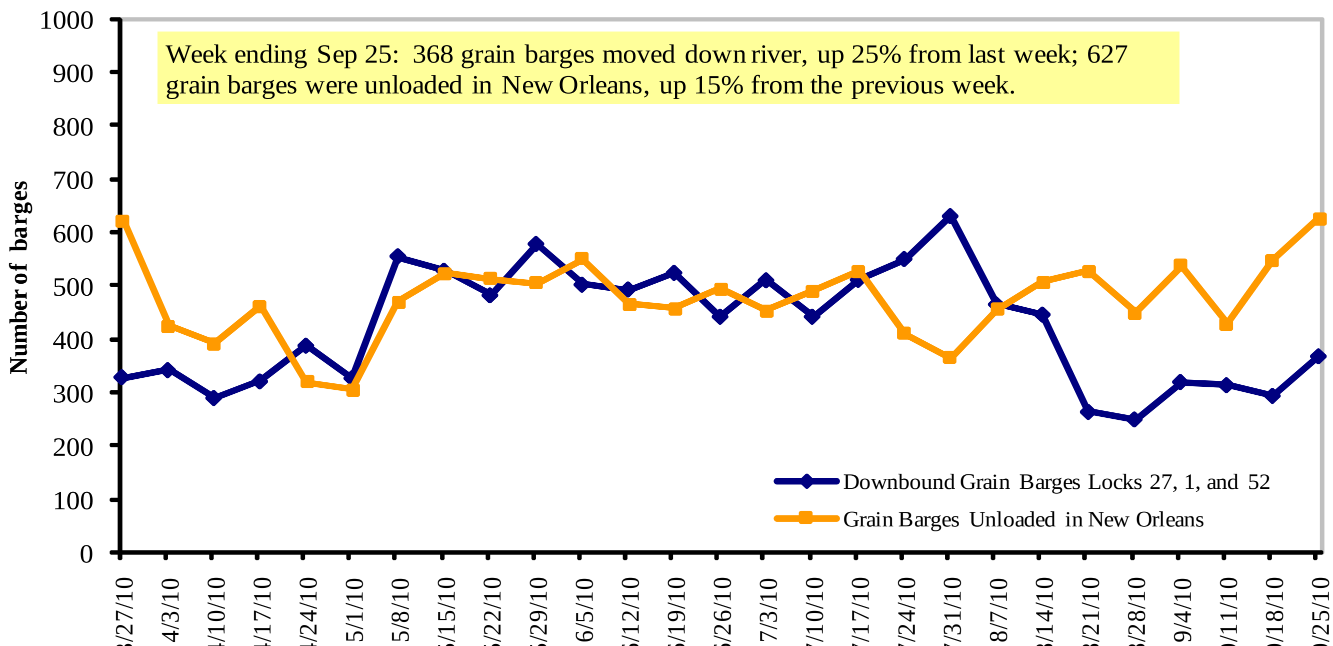
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 9/27/2010 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.946	-0.003	0.339
	New England	3.004	0.007	0.301
	Central Atlantic	3.034	-0.007	0.320
	Lower Atlantic	2.904	-0.001	0.352
II	Midwest[2]	2.928	-0.016	0.343
III	Gulf Coast[3]	2.883	-0.007	0.358
IV	Rocky Mountain	3.014	-0.023	0.356
V	West Coast	3.121	0.001	0.379
	California	3.139	-0.011	0.332
Total	U.S.	2.951	-0.009	0.350

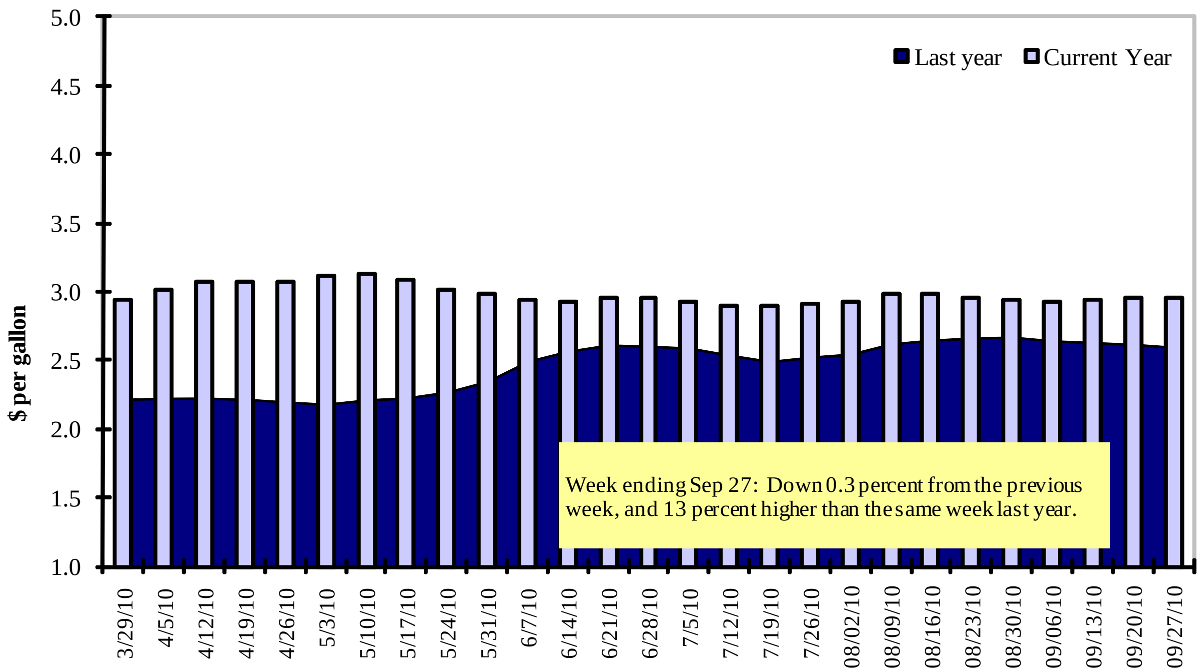
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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]									
9/16/2010	3,697	591	2,225	1,305	253	8,070	14,158	18,939	41,167
This week year ago	1,244	769	892	897	312	4,114	11,570	18,242	33,926
Cumulative exports-marketing year[2]									
2010/11 YTD	4,153	573	1,998	1,378	300	8,402	2,377	600	11,379
2009/10 YTD	2,347	997	1,389	1,150	218	6,101	2,738	541	9,380
YTD 2010/11 as % of 2009/10	177	57	144	120	138	138	87	111	121
Last 4 wks as % of same period 2008/09	295	79	248	149	107	199	105	78	102
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 09/16/10	**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]	4,838	2,988	62	15,910
Mexico	2,431	2,513	(3)	7,454
Korea[5]	1,140	1,979	(42)	5,129
Taiwan	685	734	(7)	3,198
Egypt[6]	1,081	628	72	2,233
Top 5 importers	**10,175**	**8,842**	**15**	**33,924**
Total US corn export sales	**16,534**	**14,307**	**16**	**47,180**
% of Projected	31%	28%		
Change from Last Week	562	673		
Top 5 importers' share of U.S. corn export sales	62%	62%		
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.

[4]Not included - FAS Press Release: 108,712 mt on 9/27 to Japan for 2010/11.

[5]Not included - FAS Press Release: 110,000 mt on 9/20 to Korea for 2010/11.

[6]Not included - FAS Press Release: 120,000 mt on 9/20 to Egypt for 2010/11.

Table 14

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

Week ending 09/16/10	Total Commitments[2] 2010/11 Current MY	2009/10 Last MY	% change current MY from last MY	Exports[3] 2008/09
	- 1,000 mt -			- 1,000 mt -
China[4]	9,118	11,476	(21)	18,681
Mexico	806	628	28	3,098
Japan	648	773	(16)	2,410
EU-25	65	364	(82)	2,180
Taiwan	380	356	7	1,592
Top 5 importers	**11,018**	**13,598**	**(19)**	**27,961**
Total US soybean export sales	**19,539**	**18,783**	**4**	**34,930**
% of Projected	48%	46%		
Change from last week	1,084	1,152		
Top 5 importers' share of U.S. soybean export sales	56%	72%		
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.

[4] Not included - FAS Press Release: **786,000 mt** (225,000 on 9/20; 170,000 mt on 9/21; 226,000 on 9/22, 165,000 mt on 9/29) to China for 2010/11.

Table 15

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

Week Ending 09/16/2010	Total Commitments[2] 2010/11 Current MY	2009/10 Last MY	% change current MY from last MY	Exports[3] 2009/10
	- 1,000 mt -			- 1,000 mt -
Nigeria	1,598	1,475	8	3,233
Japan	1,681	1,264	33	3,148
Mexico	1,364	874	56	1,975
Philippines	1,189	814	46	1,518
Korea, South	996	553	80	1,111
Taiwan	344	342	0	844
Venezuela	237	217	9	658
Colombia	385	335	15	575
Peru	538	309	74	567
Egypt	1,349	359	276	529
Top 10 importers	**9,682**	**6,541**	**48**	**14,156**
Total US wheat export sales	**16,472**	**10,215**	**61**	**23,980**
% of Projected	48%	43%		
Change from last week	950	507		
Top 10 importers' share of U.S. wheat export sales	59%	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 09/23/10	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	256	8,242	7,439	111	92	101	10,091
Corn	122	8,214	6,819	120	82	100	8,498
Soybeans	0	5,044	4,656	108	98	82	9,743
Total	**378**	**21,501**	**18,913**	**114**	**88**	**99**	**28,332**
Mississippi Gulf							
Wheat	100	2,956	3,135	94	88	74	4,019
Corn	640	22,231	22,684	98	104	102	28,843
Soybeans	500	11,350	12,267	93	178	200	21,831
Total	**1,241**	**36,536**	**38,087**	**96**	**116**	**114**	**54,693**
Texas Gulf							
Wheat	144	6,437	4,047	159	240	121	5,735
Corn	40	1,362	1,460	93	57	98	1,968
Soybeans	0	671	472	142	n/a	n/a	2,402
Total	**184**	**8,470**	**5,978**	**142**	**164**	**117**	**10,105**
Great Lakes							
Wheat	136	1,100	527	209	204	125	990
Corn	0	53	254	21	0	0	353
Soybeans	0	0	69	0	n/a	0	781
Total	**136**	**1,153**	**851**	**135**	**161**	**106**	**2,124**
Atlantic							
Wheat	0	218	484	45	34	38	552
Corn	0	278	202	138	7	12	472
Soybeans	1	725	481	151	77	85	1,268
Total	**1**	**1,221**	**1,167**	**105**	**24**	**33**	**2,292**
U.S. total from ports[2]							
Wheat	636	18,953	15,632	121	126	103	21,387
Corn	802	32,138	31,419	102	91	99	40,134
Soybeans	501	17,791	17,946	99	163	171	36,025
Total	**1,939**	**68,882**	**64,996**	**106**	**112**	**108**	**97,546**

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

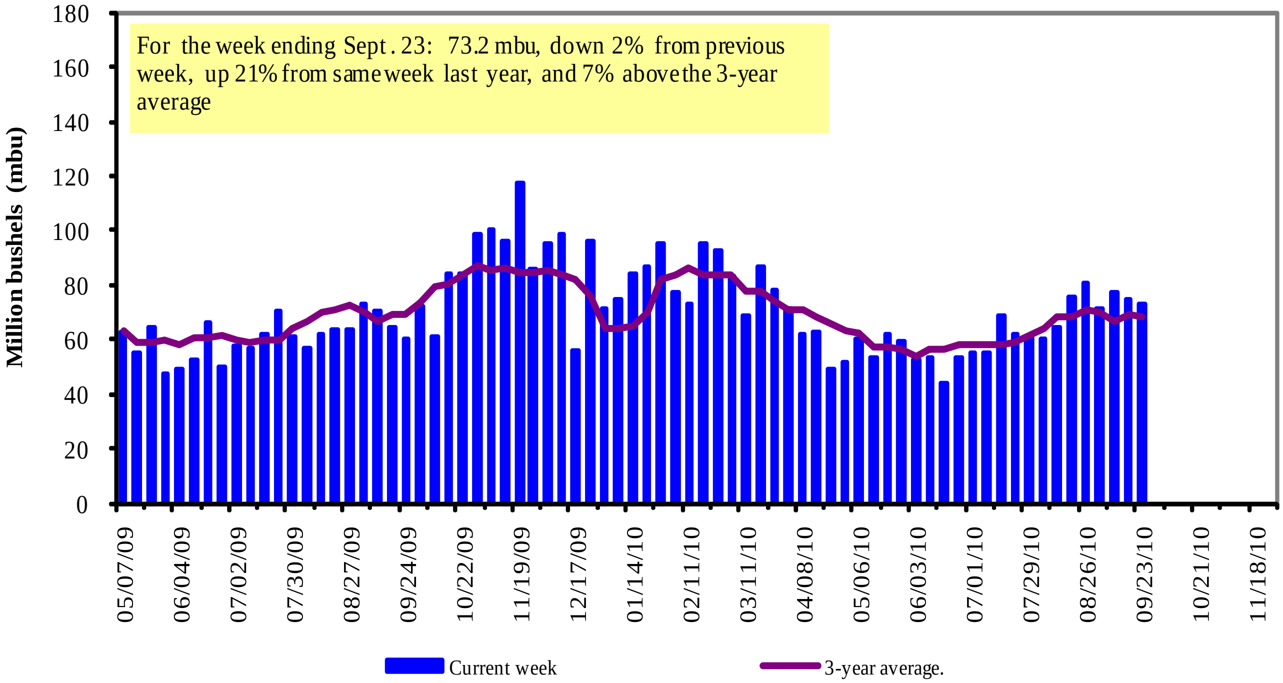
[2] Total includes only port regions shown above

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)

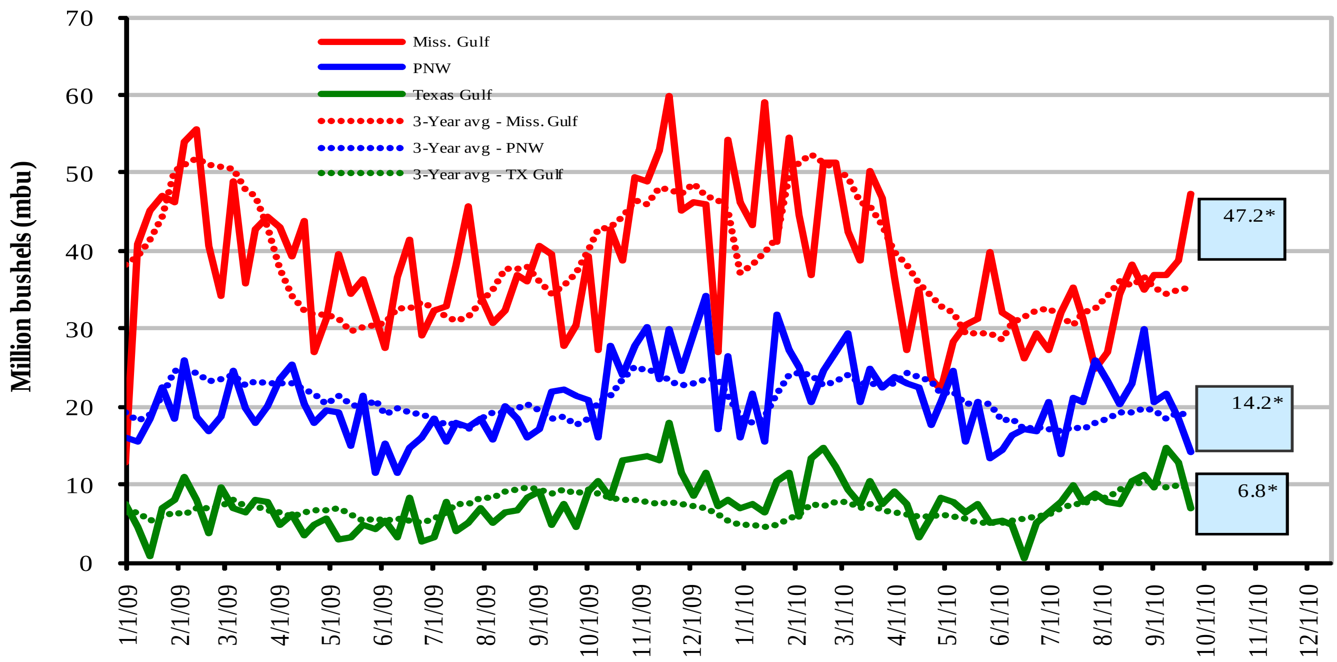


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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 23, % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 22	down 46	up 5	down 24
Last year (same week)	up 54	up 53	up 54	down 34
3-yr avg. (4-wk mov. avg.)	up 34	down 26	up 21	down 25

Ocean Transportation

Table 17

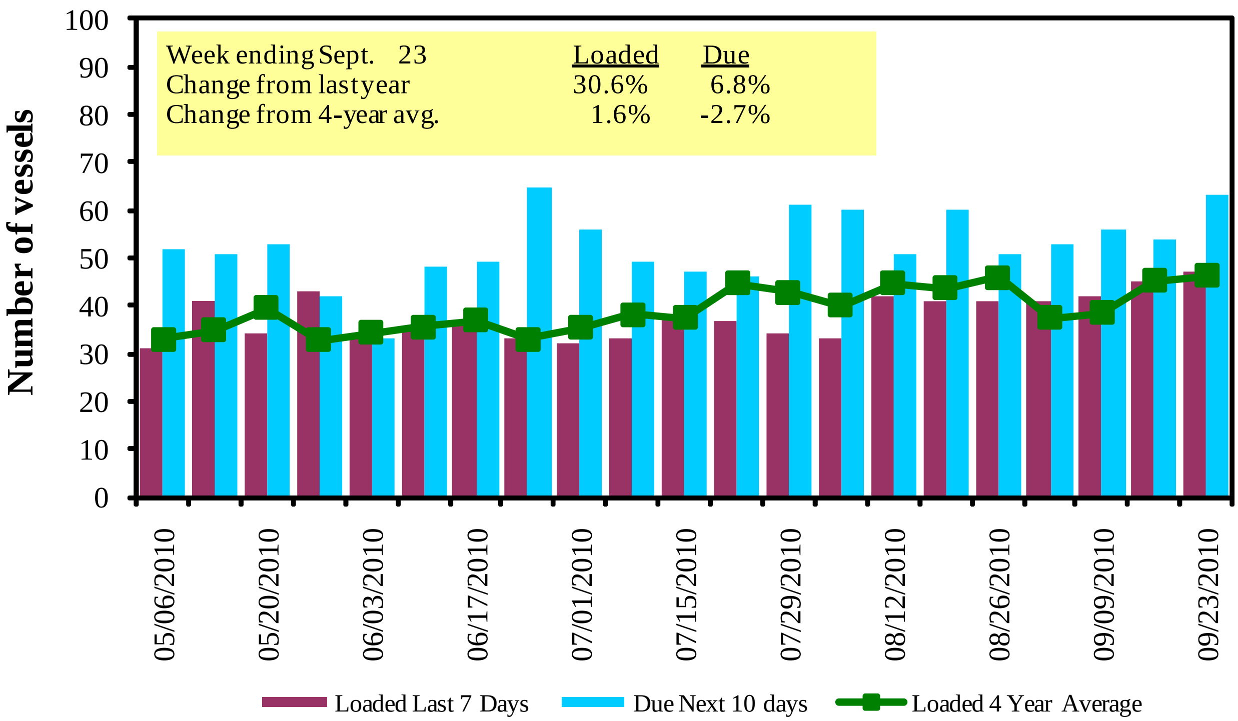
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf In port	Gulf Loaded 7-days	Gulf Due next 10-days	Pacific Northwest In port	Vancouver B.C. In port
9/23/2010	49	47	63	13	14
9/16/2010	43	45	54	11	9
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

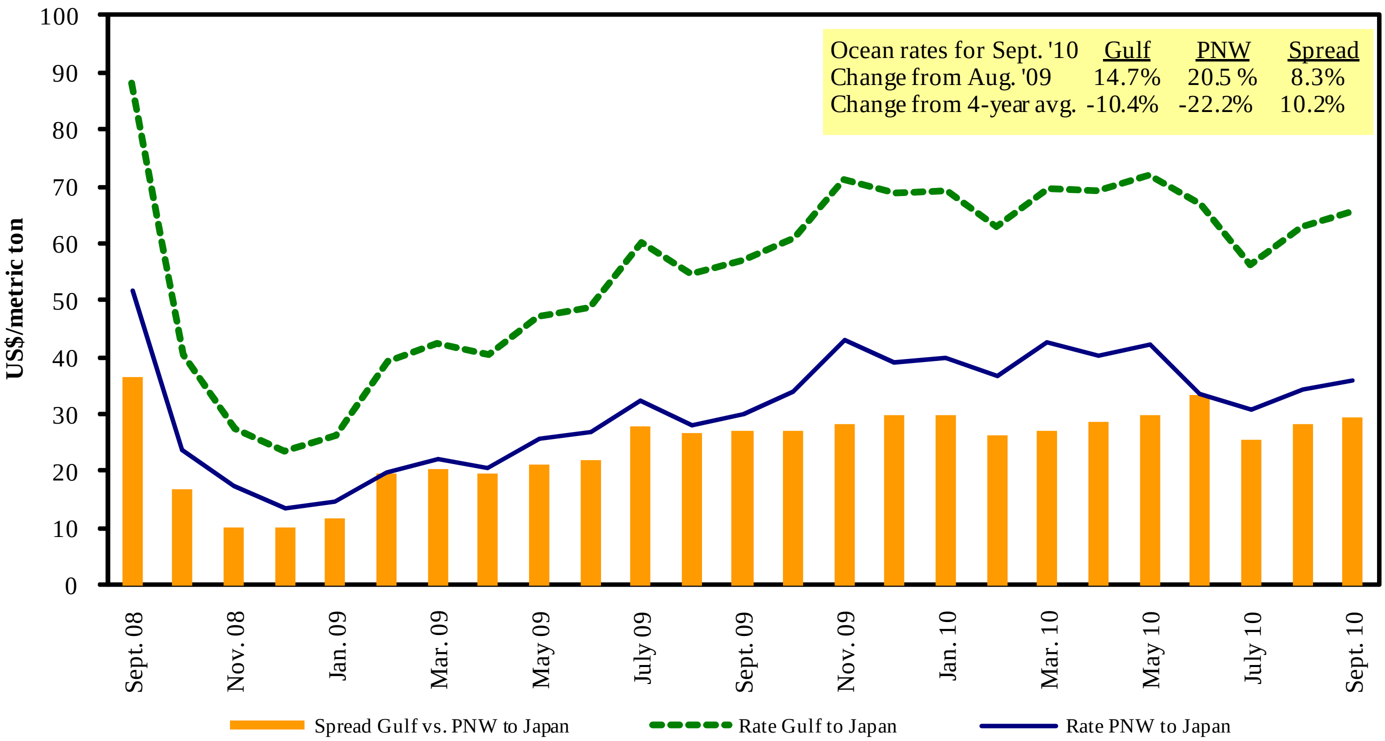


Source: Transportation & Marketing Programs/AMS/USDA

[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 9/25/2010

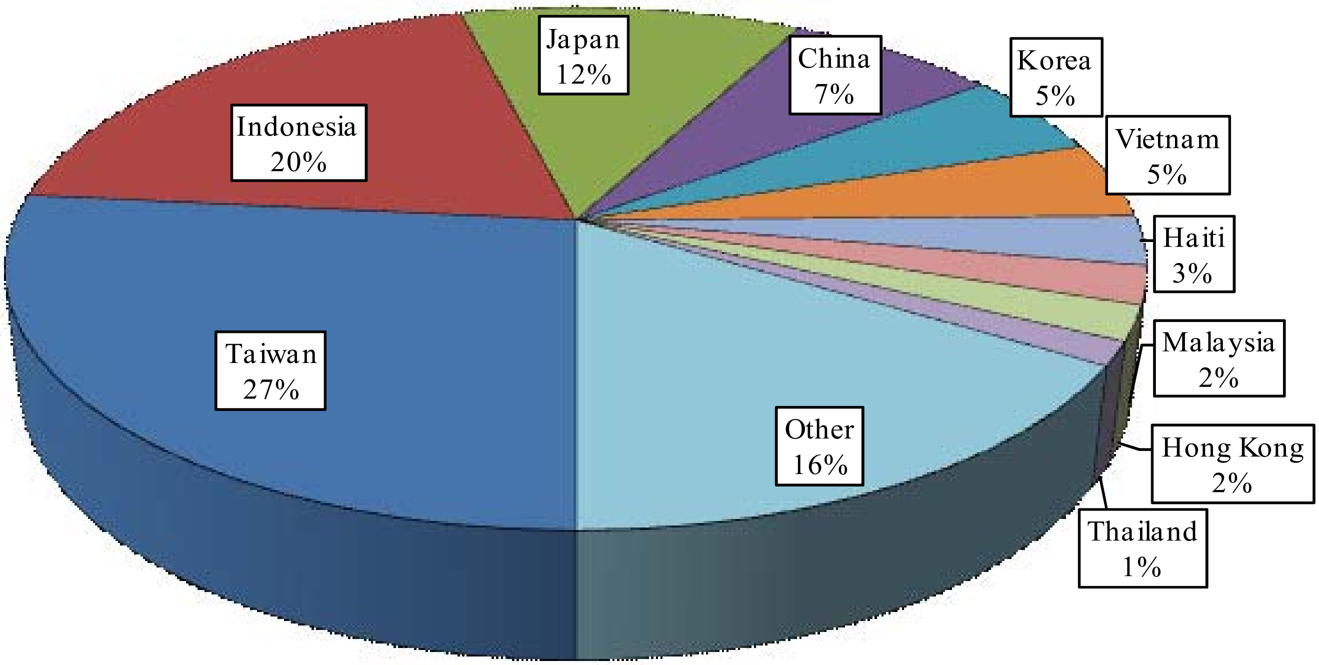
Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US $/metric ton)
U.S. Gulf	China	Heavy Grain	Oct 1/10	54,000	64.00
U.S. Gulf	N. China	Heavy Grain	Oct 1/10	55,000	63.50
U.S. Gulf	N. China	Heavy Grain	Oct 1/25	55,000	63.50
U.S. Gulf	Egypt Med	Heavy Grain	Sep 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
River Plate	Baltic	Soybeanmeal	Sep 24/26	23,000	47.50

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

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

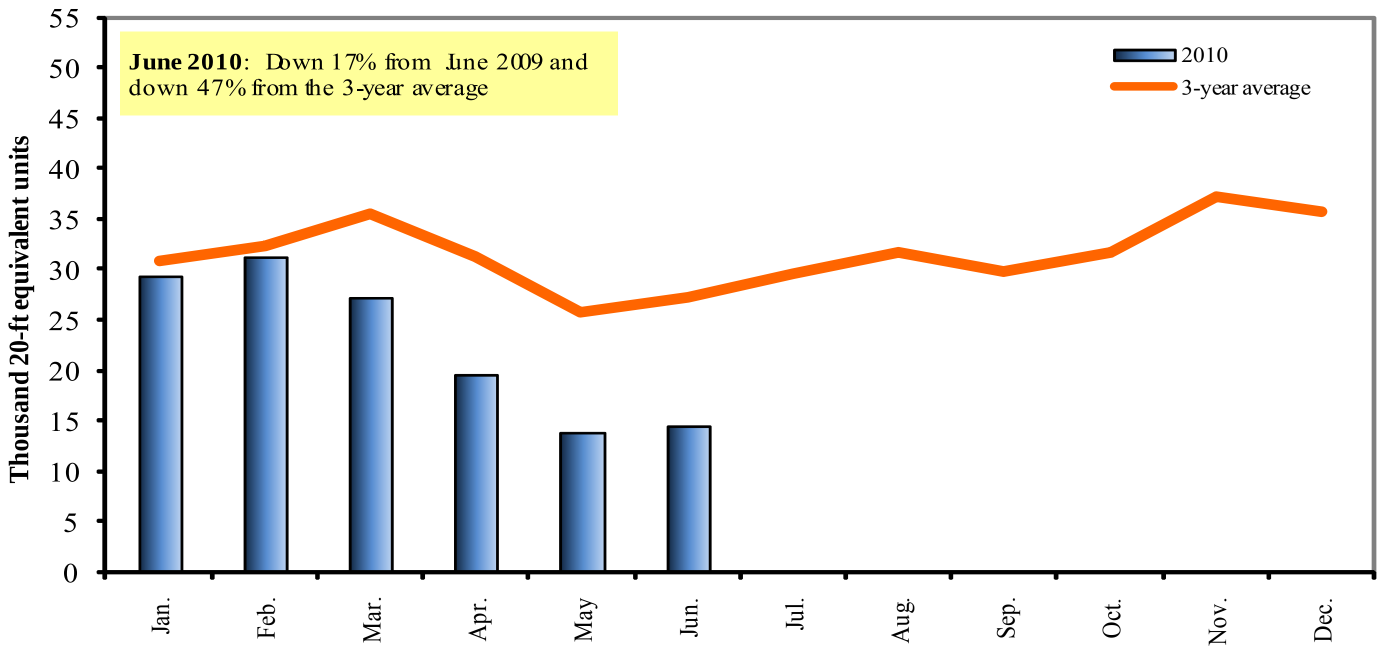
Top 10 Destination Markets for U.S. Containerized Grain Exports, June 2010



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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