



WEEKLY HIGHLIGHTS

April 21, 2011

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The next
release is
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Mississippi River Partially Closed Due to Flooding

The U.S. Army Corps of Engineers has closed seven locks on the Mississippi River due to high water levels. The closures are necessary because the river has overtopped lock gates, making the locks inoperable. These locks are closed: Lock 11 (Dubuque, IA), Lock 12 (Bellevue, IA), Lock 13 (Fulton, IL), Lock 14 (Pleasant Valley, IA), Locks 15 (Rock Island, IL), Lock 16 (Illinois City, IL), and Lock 17 (New Boston, IL). Rising Mississippi River levels may result in the closure of additional locks over the next several weeks. Since the river levels will fluctuate because of spring rains, it is too soon to forecast the closure of the remaining locks or the duration of closures for this flood event. All Illinois River locks are expected to remain open during this year's spring flooding.

Wheat Inspections Remain Strong

For the week ending April 14, total inspections of grain (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.10 million metric tons (mmt), down 3 percent from the previous week but 27 percent above last year at this time. Inspections of wheat (.971 mmt) remained strong, increasing 26 percent from the previous week, and 18 percent above the 4-week running average. Weekly wheat shipments increased 70 percent to Asia and 99 percent to Africa. Wheat inspections also increased in each of the three major export regions. **Outstanding export sales** of all wheat were down slightly from the past week but still significantly above last year at this time.

Nebraska Northwestern Railroad Receives USDOT Grant

The Nebraska Northwestern Railroad (NNW) received a \$4.9 million grant from the U.S. Department of Transportation (USDOT) that will be matched by a \$1.2 million commitment from the city of Chadron, NE. The grant will allow NNW to upgrade its lines to handle 286,000 pound railcars, which will improve the competitiveness of agricultural shippers on the line. The NNW connects to the BNSF at Crawford, NE, and to the Canadian Pacific at Dakota Junction, NE.

New Report Available - *Transportation of U.S. Grains A Modal Share Analysis, 1978-2007*

USDA's latest modal share analysis report examines trends in the type of transportation used to move grains grown for the food and feed industry, and more recently, the biofuel industry. This report estimates the volumes of corn, wheat, soybeans, sorghum, and barley to either the domestic market or to U.S. ports for export between 1978 and 2007 via rail, barge, and truck. The report provides information about changes and trends in the relative competitiveness and efficiencies among the modes in moving grain. [Click here](#) to be linked directly to the latest report.

Snapshots by Sector

Rail

U.S. railroads originated 23,542 **carloads of grain** during the week ending April 9, up 1 percent from last week, up 17 percent from last year, and 8 percent higher than the 3-year average.

During the week ending April 14, average April **non-shuttle secondary railcar bids/offers** were \$137.50 above tariff, down \$38 from last week. Average shuttle rates were \$165.50 below tariff, up \$231.50 from last week.

Ocean

During the week ending April 14, 41 **ocean-going grain vessels** were loaded in the Gulf, up 14 percent from last year. Forty-two vessels are expected to be loaded in the U.S. Gulf within the next 10 days, up 14 percent from last year.

During the week ending April 15, the cost of shipping grain from the Gulf to Japan averaged \$52 per mt, down 2 percent from the previous week. The rate from the Pacific Northwest to Japan was \$30 per mt, down 3 percent from the previous week.

Barge

During the week ending April 16, **barge grain movements** totaled 563,148 tons, 24 percent higher than the previous week and 12 percent higher than the same period last year.

During the week ending April 16, 358 grain barges **moved down river**, up 22 percent from last week; 447 grain barges were **unloaded in New Orleans**, down 18 percent from the previous week.

Fuel

During the week ending April 18, U.S. average **diesel fuel prices** increased 3 cents per gallon to \$4.11—up 0.7 percent from the previous week and 33.5 percent higher than the same week last year.

Feature Article/Calendar

CLEAN TRUCK PROGRAM: STATUS OVERVIEW

This week's feature article focuses on the Port of Los Angeles' Clean Truck Program (CTP), which impacts a significant portion of U.S. containerized grain exports and may establish precedents among other ports that are important to the export of U.S. grain. The full extent and magnitude are unknown at this time, but warrant monitoring by all grain shippers.

CTP's employee mandate remains in question awaiting a court ruling on the American Trucking Associations' (ATA) appeal. The employee mandate requires truckers serving the port to be employees rather than independent owner-operators. Therefore, changes to environmental regulations in California affect decisions made by grain exporters in the heartland, now and in the future. Many exporters believe that allowing the employee mandate to be implemented as part of the Port of Los Angeles' CTP will significantly increase their transportation costs through this important port region and these requirements may spread to other port regions over time. The Ports of Los Angeles and Long Beach moved nearly 248,000 twenty-foot equivalent units (TEUs), or 61 percent, of U.S. containerized grain exports in 2010. After a slump in 2009, containerized grain exports to Asia jumped 13 percent in 2010 to more than 383,000 TEUs, the third highest annual volume on record. Continued strong demand for identity-preserved grains and other containerized grain movements will increase the impact of these types of port programs.

The greatest controversy is caused by the requirement for truckers serving the port to be employee drivers, which ATA feels is an illegal action against independent truck owner-operators based on the Federal Aviation Administration Authorization Act (FAAAA). In July 2008, ATA filed a lawsuit which resulted in an injunction against certain parts of the CTP. On August 26, 2010, however, the U.S. District Court, Central District of California, ruled in favor of the Port of Los Angeles to overturn the injunction. ATA then filed an appeal with the Ninth Circuit Court of Appeals to overturn the decision. On October 26, at the request of ATA, the District Court reinstated the injunction of the employee mandate portion of the Clean Truck Program during the appeal process. Other portions of the program enjoined under the previous injunction, such as the off-street parking regulations and the job referral service requirements, were not included in the Court's latest injunction.

The FAAAA has been under attack since ATA began its lawsuit against the Port of Los Angeles. Current law under FAAAA preempts States from enacting requirements related to the price, route, or service of any motor carrier. Without a change to the law, the Port of Los Angeles will rely on the court decision that the port is a "market participant" and not a State entity, and therefore able to implement the employee mandate portion of its CTP.

Since implementation of the CTP in Southern California, many ports around the country have implemented similar programs. All U.S. ports seeking to reduce emissions have learned from the Southern California program that progressive elimination of "dirty" trucks helps achieve pollution reduction. Most of the ports with similar programs have also learned from the California example that charging beneficial cargo owners fees for using older trucks and requiring truckers to be employee drivers are controversial. For example, the Ports of Seattle and Tacoma have implemented programs to restrict the use of "dirty" trucks without an employee mandate provision.

Currently only the Port of New York/New Jersey has indicated its intention to enforce an employee driver provision if the mandate is upheld in California. The Port of Oakland has not taken an official stance on the employee mandate, although the previous mayor was in support of such a requirement. If the Port of Los Angeles is allowed to enforce the employee driver provision, other ports around the country may follow the Los Angeles example.

Recent Additions to the Southern California CTP

In early January, the Ports of Los Angeles and Long Beach decided to include smaller Class 7 trucks in its CTP. The smaller Class 7 trucks are used primarily to move containers, often empty, between ports and terminals. Additionally, the ports established a program to impose penalties on beneficial cargo owners when the drivers of their trucks participate in a “dray-off,” the practice of switching cargo from a “clean” to a “dirty” truck within the Harbor District. These recent actions help ensure that truckers are operating within the letter and spirit of the CTP.

California Environmental Programs

CTP is part of the overall Clean Air Action Plan (CAAP) the Ports of Los Angeles and Long Beach developed in 2006. In November 2010, the ports approved a revision to the plan, which establishes new goals through 2025, to further reduce emissions and encourage the use of technology to meet these goals. The updates direct the ports to develop the following standards for reducing air pollutant emissions and health risks, relative to the 2005 base year:

- By 2014, reduce port-related emissions by 22 percent for Nitrogen Oxide (NOx), 93 percent for Oxides of Sulfur (Sox) and 72 percent for diesel particulate matter (DPM).
- By 2023, reduce port-related emissions by 59 percent for NOx, 93 percent for SOx and 77 percent for DPM.
- In addition, the ports have developed a “health-risk reduction standard” that will aim by 2020 to lower the residential cancer risk due to diesel particulate pollution by 85 percent in the port region and communities adjacent to the ports. (*San Pedro Bay Ports Clean Air Action Plan, 2010 Update*, www.cleanairactionplan.org)

The overall motivation for these port initiatives (the CAAP and the CTP) is the California Air Resource Board (CARB) environmental plan for the State. The CARB Statewide plan applies diesel emissions reduction measures to all trucks and transport refrigeration units operating in California, including trucks entering California from other States. “Heavy-duty truck and bus regulations approved in late 2008 by CARB will be phased in over the next 13 years. By 2023, all heavy-duty trucks operating on California roads and highways must have 2010 engines or the equivalent.” (*Journal of Commerce*, “Executives: Election Results Will Not Affect Clean-Air Rules,” Oct. 13, 2010)

These initiatives have an impact on how agricultural products, both domestic and international, are moved through California. The initiatives are also expected to impact the cost of transporting agricultural products to and through the ports. Many of these regulations hold not only the transportation provider, but also the cargo owner, responsible for the type of truck and refrigeration unit used. Agricultural shippers should closely follow changes to these regulations and their impact on the cost and availability of trucks. (April.Taylor@ams.usda.gov)

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

Week ending	Truck	Rail ²	Barge	Ocean	
				Gulf	Pacific
04/20/11	276	137	229	233	213
04/13/11	274	254	238	237	220

¹Indicator: 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)

²The 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)

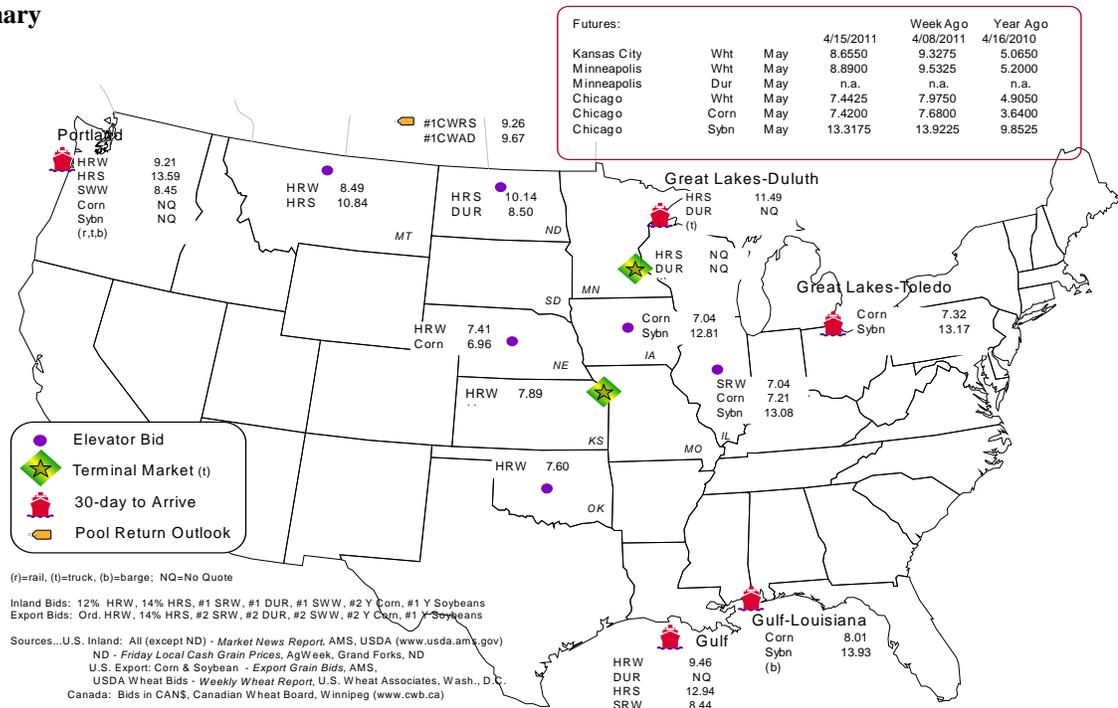
Commodity	Origin--Destination	4/15/2011	4/9/2011
Corn	IL--Gulf	-0.80	-0.79
Corn	NE--Gulf	-1.05	-1.09
Soybean	IA--Gulf	-1.12	-1.12
HRW	KS--Gulf	-1.57	-1.42
HRS	ND--Portland	-3.45	-3.47

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		Cross-Border	Pacific	Atlantic &	Total
	Gulf	Texas Gulf	Mexico	Northwest	East Gulf	
4/13/2011 ^P	703	2,654	1,116	3,979	539	8,991
4/06/2011 ^r	1,104	2,965	1,557	3,868	600	10,094
2011 YTD	16,634	34,768	11,484	59,949	11,018	133,853
2010YTD	6,408	23,228	13,563	51,330	14,994	109,523
2011 YTD as % of 2010 YTD	260	150	85	117	73	122
Last 4 weeks as % of 2010 ²	436	188	127	126	101	149
Last 4 weeks as % of 4-year avg. ²	168	174	144	96	109	122
Total 2010	33,971	83,492	42,794	177,896	32,780	370,933
Total 2009	33,423	57,646	36,738	175,965	30,328	334,100

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2010 and prior 4-year average.

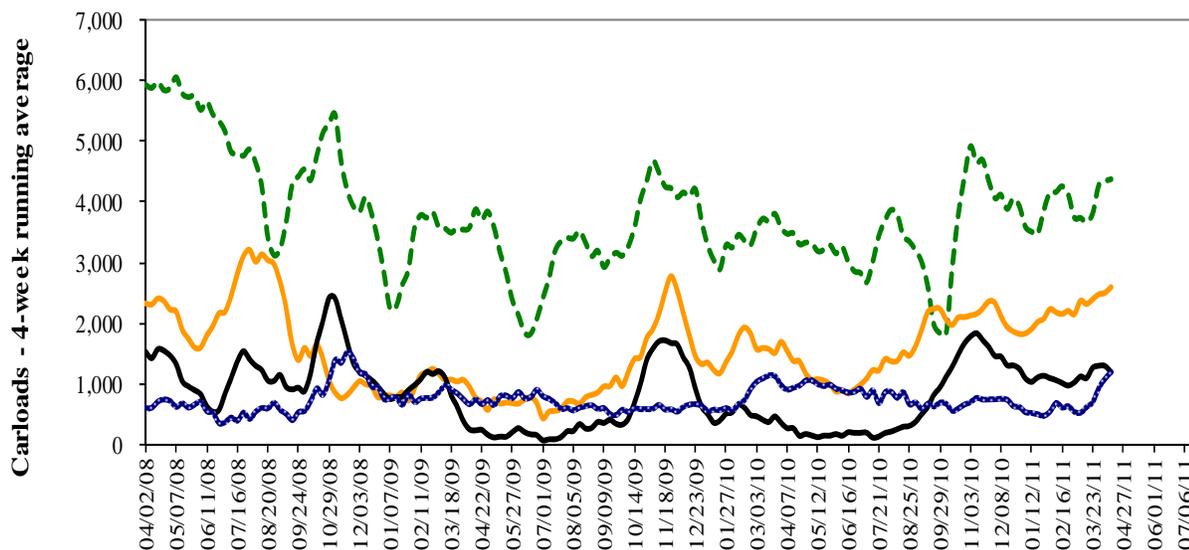
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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



- Pacific Northwest: 4wks. ending 4/13--up 26% from same period last year; down 4% from 4-year average
- Texas Gulf: 4 wks. ending 4/13-- up 88% from same period last year; up 74% from 4-year average
- Miss. River: 4 wks. Ending 4/13 -- up 336% from same period last year; up 68% from 4-year average
- Cross-border Mexico: 4 wks. ending 4/13 -- up 27% from same period last year; up 44% from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

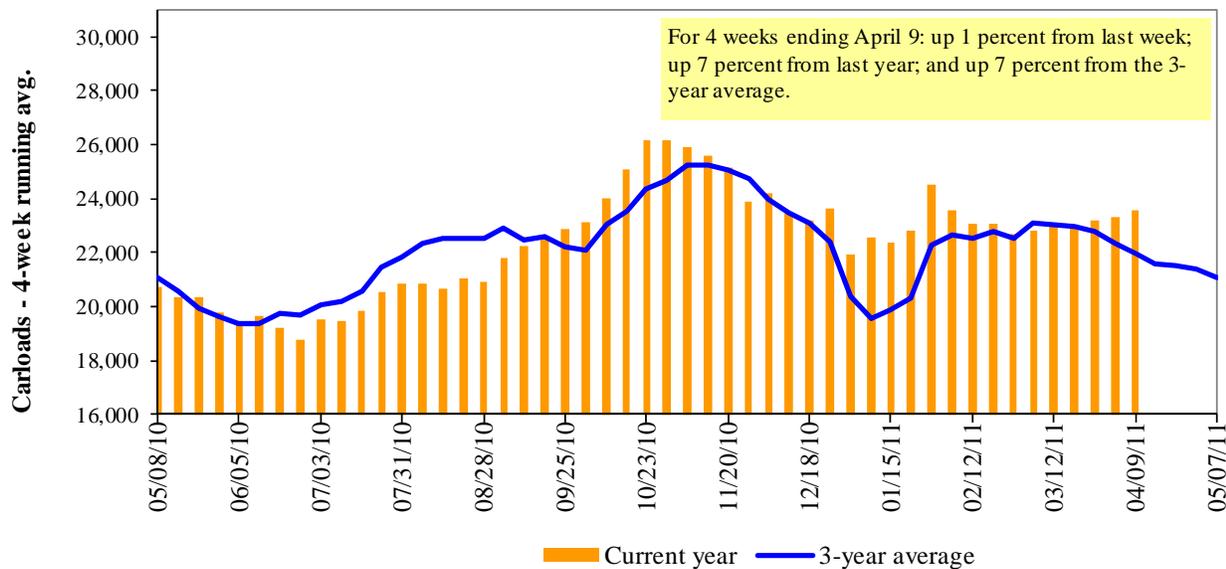
Table 4

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
04/09/11	2,187	2,916	11,897	619	5,923	23,542	4,586	4,868
This week last year	2,408	2,770	9,972	791	4,269	20,210	3,604	6,517
2011 YTD	30,214	42,176	160,344	8,349	87,197	328,280	56,419	64,353
2010 YTD	33,016	42,618	151,496	10,898	76,819	314,847	57,156	74,306
2011 YTD as % of 2010 YTD	92	99	106	77	114	104	99	87
Last 4 weeks as % of 2010 ¹	92	103	108	90	117	107	112	88
Last 4 weeks as % of 3-yr avg. ¹	83	111	112	95	113	108	108	91
Total 2010	111,935	159,836	546,901	35,807	295,361	1,149,840	203,038	265,835

¹As a percent of the same period in 2009 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 Offerings¹ (\$/car)²

Week ending	Delivery period							
	Apr-11	Apr-10	May-11	May-10	Jun-11	Jun-10	Jul-11	Jul-10
BNSF ³								
COT grain units	no offer	n/a	no offer	0	3	0	9	0
COT grain single-car ⁵	no offer	n/a	no offer	0 . . 11	27 . . 70	no bids	27 . . 70	no bids
UP ⁴								
GCAS/Region 1	1	n/a	no bids	no bids	no bids	no bids	n/a	no bids
GCAS/Region 2	no bids	n/a	no bids	no bids	no bids	no bids	n/a	no bids

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

²Average premium/discount to tariff, last auction

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

⁴UP - 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.

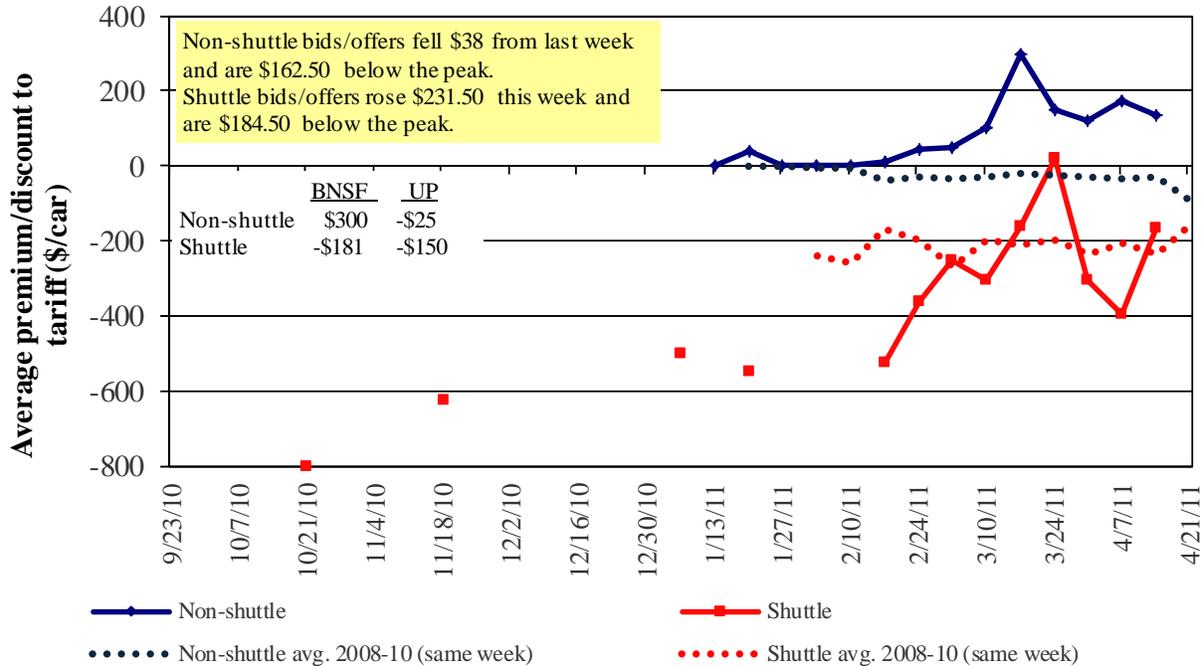
⁵Range is shown because average is not available. Not available = n/a.

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 April 2011, Secondary Market

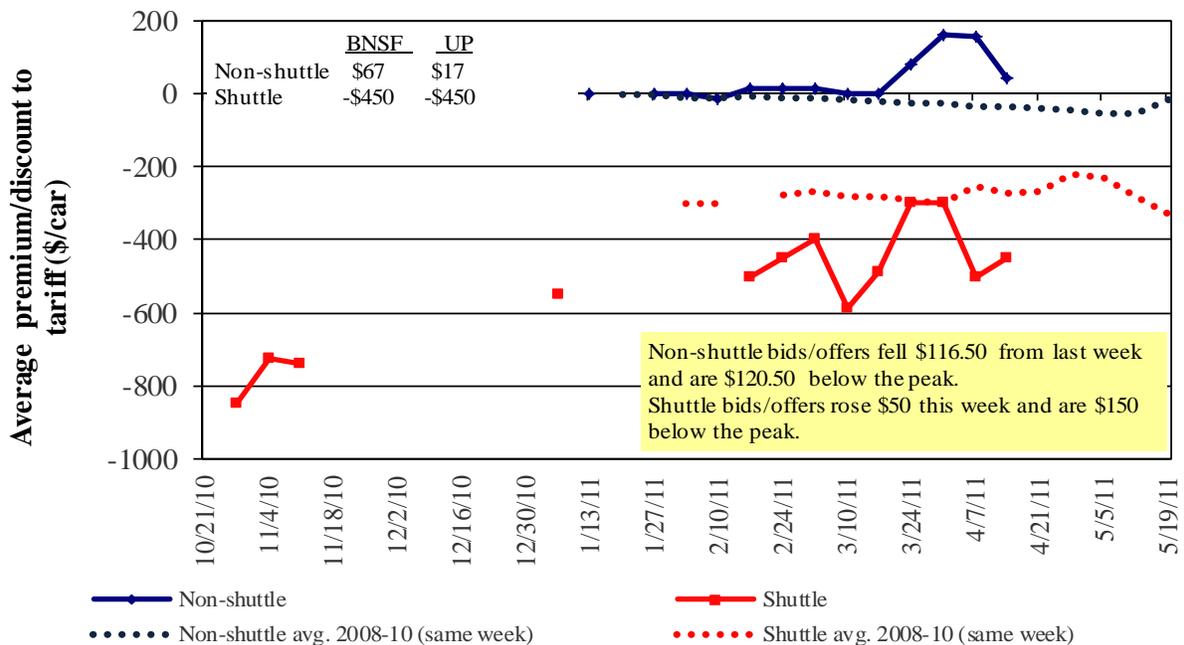


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in May 2011, Secondary Market

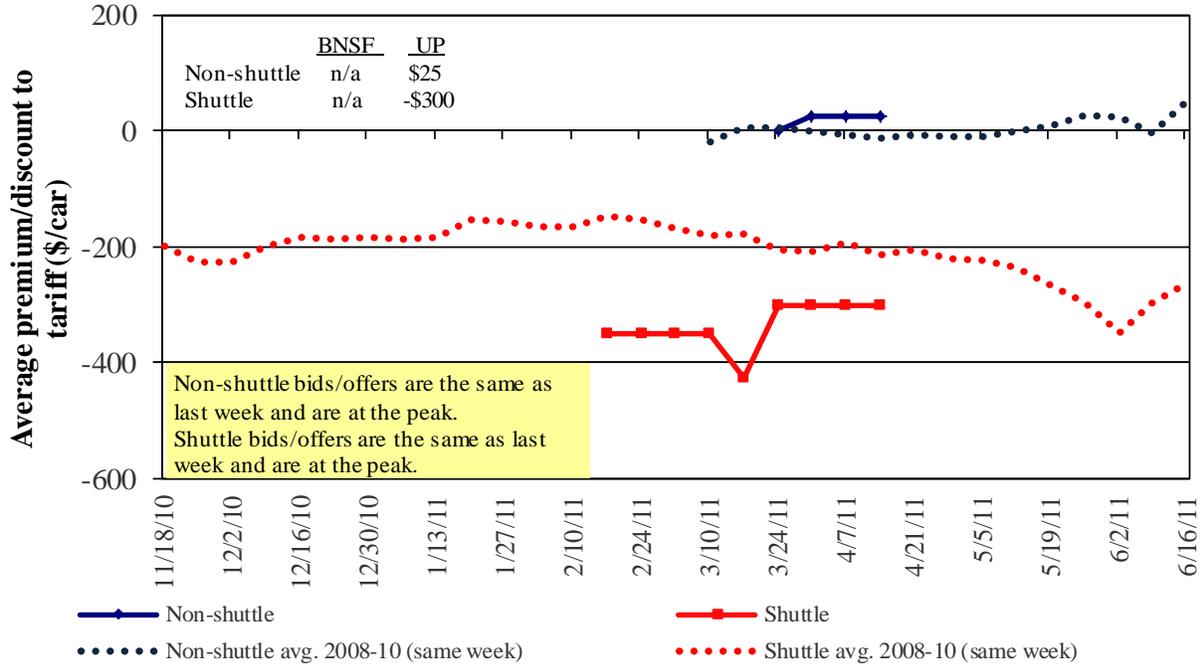


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in June 2011, 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					
	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11
4/14/2011						
Non-shuttle						
BNSF-GF	300	67	n/a	n/a	n/a	n/a
Change from last week	(50)	(233)	n/a	n/a	n/a	n/a
Change from same week 2010	n/a	80	n/a	n/a	n/a	n/a
UP-Pool	(25)	17	25	n/a	n/a	n/a
Change from last week	(26)	-	-	n/a	n/a	n/a
Change from same week 2010	n/a	30	40	n/a	n/a	n/a
Shuttle²						
BNSF-GF	(181)	(450)	n/a	n/a	n/a	n/a
Change from last week	275	100	n/a	n/a	n/a	n/a
Change from same week 2010	n/a	(162)	n/a	n/a	n/a	n/a
UP-Pool	(150)	(450)	(300)	(250)	(250)	(200)
Change from last week	188	-	-	-	-	-
Change from same week 2010	n/a	(325)	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 Shipments¹

Effective date:						
4/4/2011	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:	
					metric ton	bushel ²
Unit train						
Wheat	Wichita, KS	St. Louis, MO	\$2,883	\$152	\$30.14	\$0.82
	Grand Forks, ND	Duluth-Superior, MN	\$2,822	\$83	\$28.85	\$0.79
	Wichita, KS	Los Angeles, CA	\$5,710	\$428	\$60.96	\$1.66
	Wichita, KS	New Orleans, LA	\$3,384	\$267	\$36.26	\$0.99
	Sioux Falls, SD	Galveston-Houston, TX	\$5,410	\$352	\$57.22	\$1.56
	Northwest KS	Galveston-Houston, TX	\$3,651	\$293	\$39.16	\$1.07
	Amarillo, TX	Los Angeles, CA	\$3,850	\$407	\$42.28	\$1.15
Corn	Champaign-Urbana, IL	New Orleans, LA	\$2,812	\$302	\$30.92	\$0.84
	Toledo, OH	Raleigh, NC	\$3,760	\$346	\$40.78	\$1.11
	Des Moines, IA	Davenport, IA	\$1,843	\$64	\$18.94	\$0.52
	Indianapolis, IN	Atlanta, GA	\$3,196	\$260	\$34.32	\$0.93
	Indianapolis, IN	Knoxville, TN	\$2,760	\$167	\$29.06	\$0.79
	Des Moines, IA	Little Rock, AR	\$2,938	\$188	\$31.04	\$0.84
	Des Moines, IA	Los Angeles, CA	\$4,372	\$547	\$48.85	\$1.33
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,311	\$320	\$36.06	\$0.98
	Toledo, OH	Huntsville, AL	\$2,921	\$246	\$31.45	\$0.86
	Indianapolis, IN	Raleigh, NC	\$3,830	\$349	\$41.50	\$1.13
	Indianapolis, IN	Huntsville, AL	\$2,613	\$167	\$27.60	\$0.75
	Champaign-Urbana, IL	New Orleans, LA	\$3,156	\$302	\$34.34	\$0.93
Shuttle Train						
Wheat	Great Falls, MT	Portland, OR	\$3,239	\$246	\$34.61	\$0.94
	Wichita, KS	Galveston-Houston, TX	\$3,144	\$192	\$33.13	\$0.90
	Chicago, IL	Albany, NY	\$3,497	\$325	\$37.95	\$1.03
	Grand Forks, ND	Portland, OR	\$4,702	\$426	\$50.92	\$1.39
	Grand Forks, ND	Galveston-Houston, TX	\$5,648	\$443	\$60.49	\$1.65
	Northwest KS	Portland, OR	\$4,619	\$480	\$50.63	\$1.38
Corn	Minneapolis, MN	Portland, OR	\$4,680	\$518	\$51.62	\$1.40
	Sioux Falls, SD	Tacoma, WA	\$4,640	\$475	\$50.79	\$1.38
	Champaign-Urbana, IL	New Orleans, LA	\$2,677	\$302	\$29.58	\$0.81
	Lincoln, NE	Galveston-Houston, TX	\$3,190	\$277	\$34.43	\$0.94
	Des Moines, IA	Amarillo, TX	\$3,330	\$236	\$35.41	\$0.96
	Minneapolis, MN	Tacoma, WA	\$4,680	\$514	\$51.58	\$1.40
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,080	\$532	\$45.80	\$1.25
	Sioux Falls, SD	Tacoma, WA	\$4,840	\$475	\$52.78	\$1.44
	Minneapolis, MN	Portland, OR	\$4,830	\$518	\$53.11	\$1.45
	Fargo, ND	Tacoma, WA	\$4,730	\$422	\$51.16	\$1.39
	Council Bluffs, IA	New Orleans, LA	\$3,510	\$348	\$38.31	\$1.04
	Toledo, OH	Huntsville, AL	\$2,536	\$246	\$27.63	\$0.75
	Grand Island, NE	Portland, OR	\$4,520	\$491	\$49.76	\$1.35

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 surcharge

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:		Percent change Y/Y ⁴
					metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$6,854	\$450	\$74.63	\$2.03	5
	OK	Cuautitlan, EM	\$6,191	\$480	\$68.16	\$1.85	7
	KS	Guadalajara, JA	\$6,825	\$737	\$77.27	\$2.10	8
	TX	Salinas Victoria, NL	\$3,237	\$193	\$35.04	\$0.95	4
Corn	IA	Guadalajara, JA	\$7,310	\$737	\$82.23	\$2.09	9
	SD	Penjamo, GJ	\$7,000	\$589	\$77.54	\$1.97	4
	NE	Queretaro, QA	\$6,495	\$627	\$72.77	\$1.85	8
	SD	Salinas Victoria, NL	\$5,290	\$448	\$58.63	\$1.49	10
	MO	Tlalnepantla, EM	\$5,669	\$611	\$64.17	\$1.63	9
	SD	Torreon, CU	\$6,060	\$493	\$66.96	\$1.70	8
Soybeans	MO	Bojay (Tula), HG	\$6,368	\$636	\$71.57	\$1.95	5
	NE	Guadalajara, JA	\$7,200	\$724	\$80.97	\$2.20	9
	IA	El Castillo, JA ⁵	\$7,390	\$585	\$81.49	\$2.22	7
	KS	Torreon, CU	\$5,790	\$493	\$64.20	\$1.75	10
Sorghum	OK	Cuautitlan, EM	\$5,220	\$447	\$57.90	\$1.47	14
	TX	Guadalajara, JA	\$6,020	\$383	\$65.43	\$1.66	6
	NE	Penjamo, GJ	\$6,575	\$664	\$73.96	\$1.88	2
	KS	Queretaro, QA	\$5,895	\$429	\$64.61	\$1.64	10
	NE	Salinas Victoria, NL	\$4,725	\$406	\$52.43	\$1.33	10
	NE	Torreon, CU	\$5,710	\$528	\$63.73	\$1.62	8

¹Rates 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.

²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

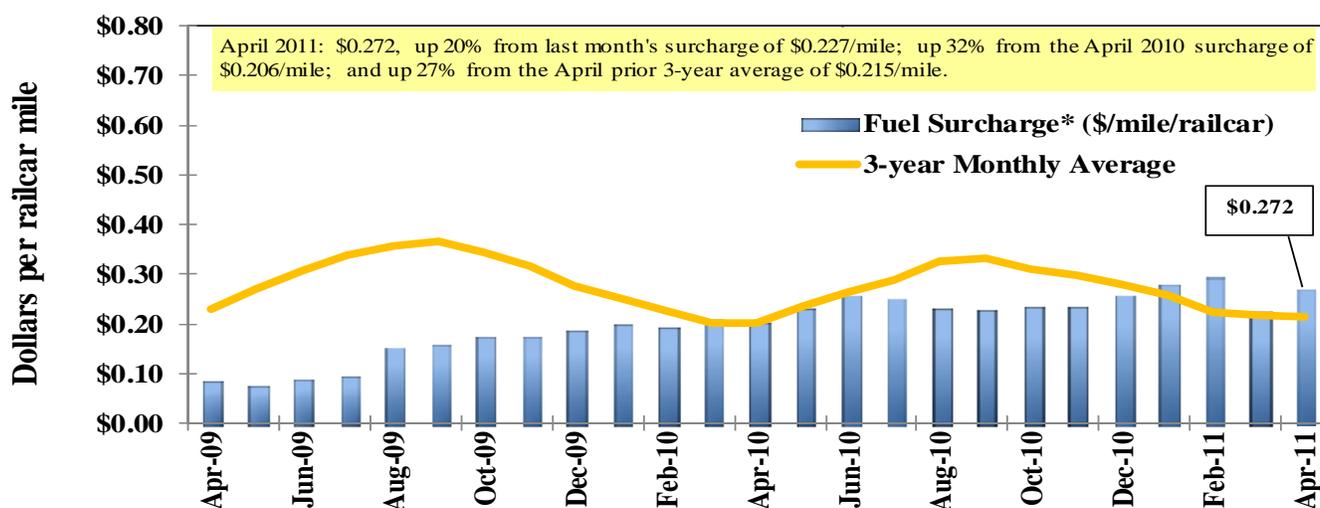
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

⁴Percentage change year over year calculated using tariff rate plus fuel surcharge

⁵Beginning 12/6/10, El Castillo, JA replaced Penjamo, GJ as the destination

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹

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.

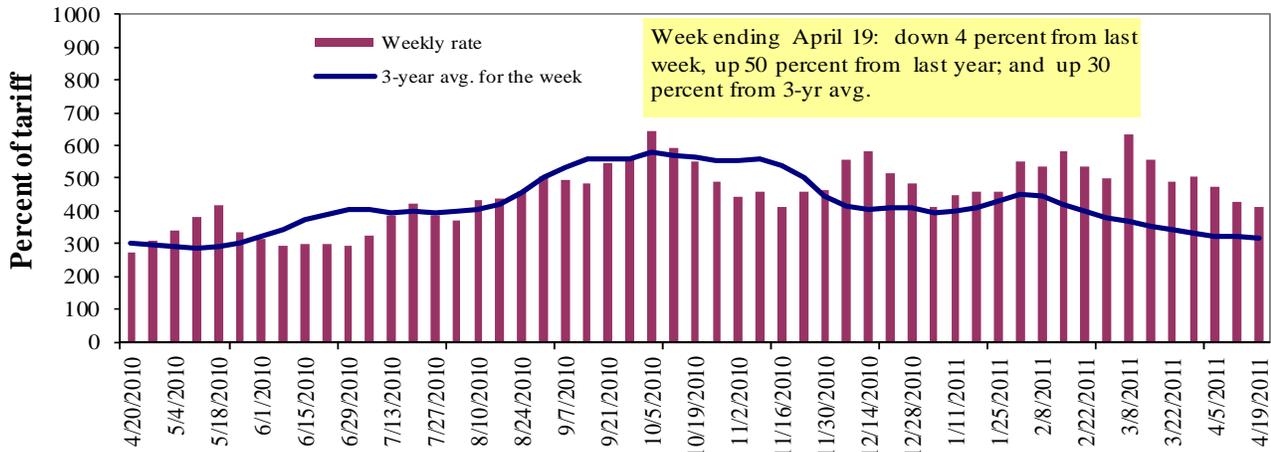
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

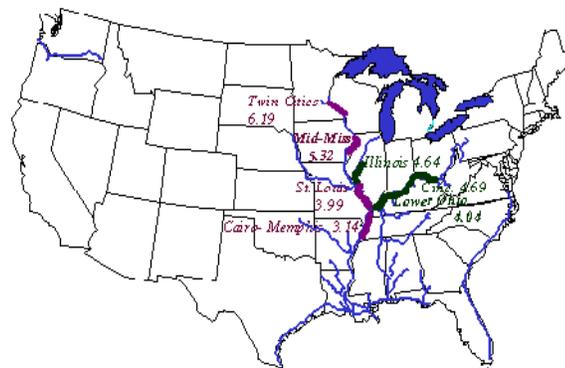
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid- Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo- Memphis
Rate¹	4/19/2011	-	no rates	413	300	412	417	265
	4/12/2011	-	419	429	314	434	434	283
\$/ton	4/19/2011	-	-	19.16	11.97	19.32	16.85	8.32
	4/12/2011	-	22.29	19.91	12.53	20.35	17.53	8.89
Current week % change from the same week:								
	Last year	-	-	50	55	87	89	46
	3-year avg. ²	-	-	30	25	50	52	18
Rate¹	May	492	452	427	308	402	402	283
	July	517	475	475	375	442	442	342

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9
Benchmark tariff rates



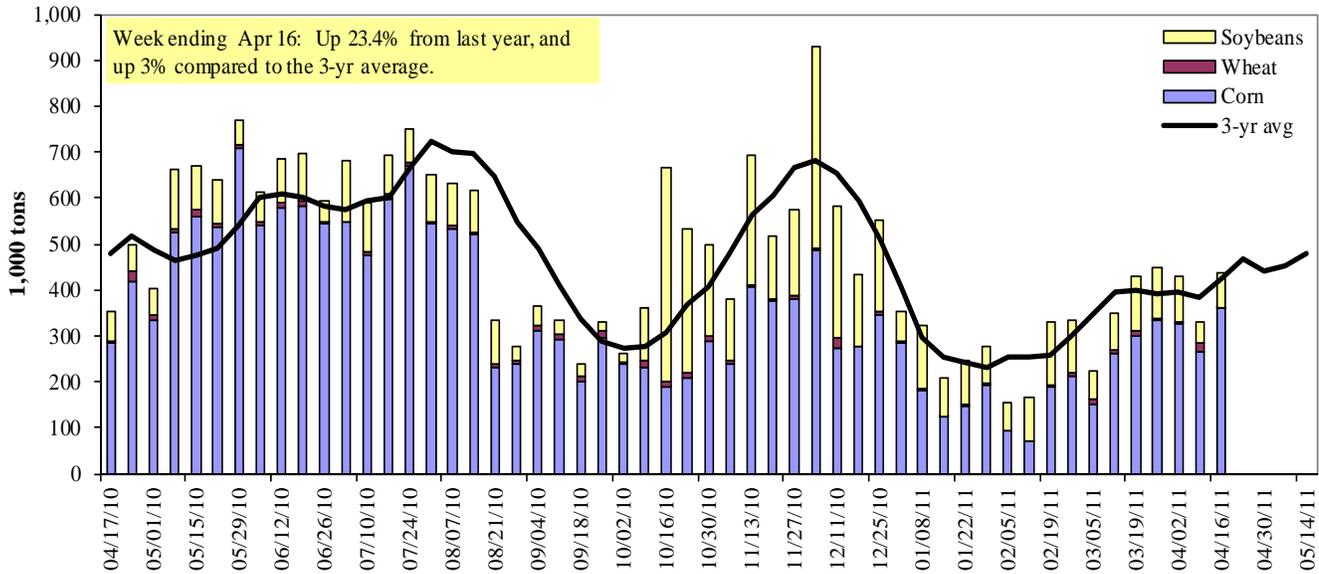
Calculating barge rate per ton:

$(\text{Index} * 1976 \text{ tariff benchmark rate per ton}) / 100$

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 10

Barge Movements on the Mississippi River¹ (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/webprts/default.asp)

Table 10

Barge Grain Movements (1,000 tons)

Week ending 4/16/2011	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	86	0	28	0	114
Winfield, MO (L25)	193	0	63	0	256
Alton, IL (L26)	347	2	72	0	421
Granite City, IL (L27)	360	2	76	2	439
Illinois River (L8)	122	6	19	0	147
Ohio River (L52)	71	12	10	0	94
Arkansas River (L1)	1	10	17	3	31
Weekly total - 2011	433	23	103	4	563
Weekly total - 2010	386	12	101	4	503
2011 YTD ¹	5,090	330	2,898	109	8,426
2010 YTD	5,271	280	3,004	126	8,682
2011 as % of 2010 YTD	97	118	96	86	97
Last 4 weeks as % of 2010 ²	117	188	104	120	116
Total 2010	22,768	1,220	10,373	481	34,841

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.

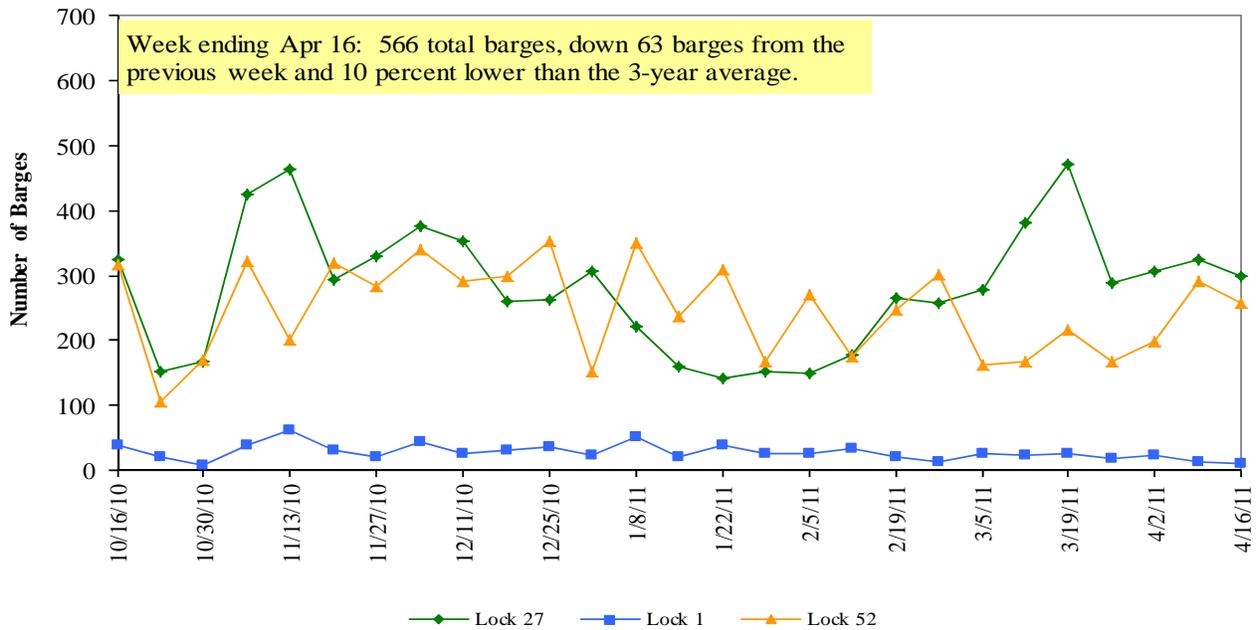
² As a percent of same period in 2010.

Note: Total may not add exactly, due to rounding

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

Figure 11

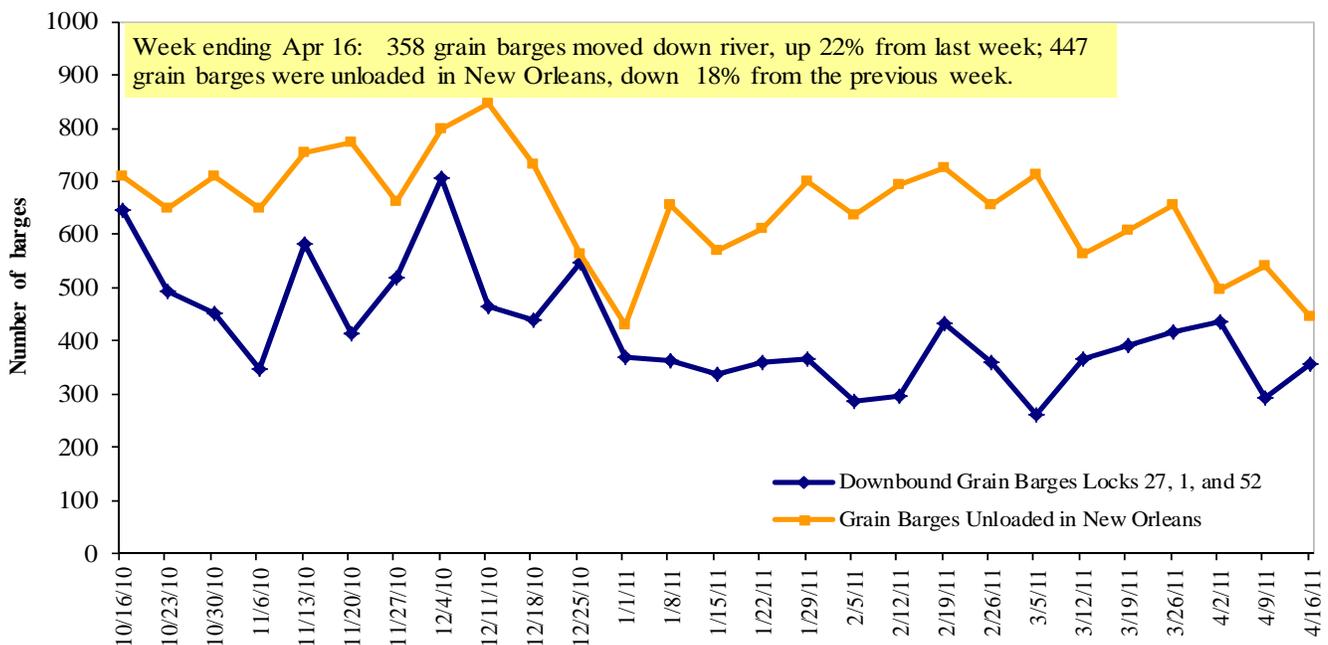
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 Prices¹, Week Ending 4/18/2011 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.111	0.029	1.030
	New England	4.212	0.058	1.109
	Central Atlantic	4.229	0.025	1.040
	Lower Atlantic	4.051	0.027	1.018
II	Midwest ²	4.068	0.028	1.024
III	Gulf Coast ³	4.033	0.032	0.999
IV	Rocky Mountain	4.126	0.029	1.017
V	West Coast	4.319	0.011	1.116
	California	4.440	0.043	1.212
Total	U.S.	4.105	0.027	1.031

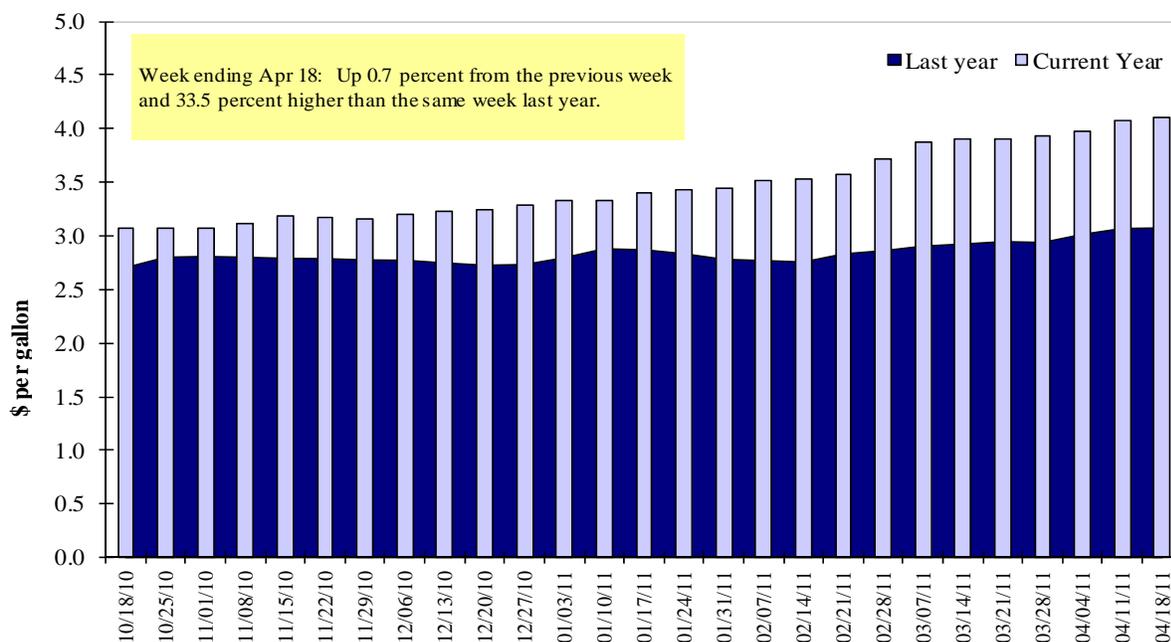
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

²Same as North Central ³Same 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)

Week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances¹									
4/7/2011	3,152	704	2,103	1,275	125	7,358	13,211	5,142	25,711
This week year ago	961	385	988	619	107	3,060	9,702	2,175	14,937
Cumulative exports-marketing year²									
2010/11 YTD	13,167	2,097	7,011	3,844	809	26,927	26,549	35,431	88,907
2009/10 YTD	7,281	2,439	4,495	3,381	877	18,473	27,159	34,510	80,142
YTD 2010/11 as % of 2009/10	181	86	156	114	92	146	98	103	111
Last 4 wks as % of same period 2009/10	361	204	219	209	125	257	138	272	182
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 Importers¹ of U.S. Corn

Week ending 04/07/11	Total Commitments ²		% change current MY from last MY	Exports ³ 2009/10
	Current MY	Last MY		
- 1,000 mt -				
Japan	11,630	10,470	11	14,343
Mexico	6,417	7,014	(9)	7,999
Korea	4,392	5,877	(25)	7,562
Taiwan	2,311	2,456	(6)	2,949
Egypt	2,374	1,574	51	2,935
Top 5 importers	27,125	27,391	(1)	35,788
Total US corn export sales	39,760	36,861	8	50,460
% of Projected	80%	73%		
Change from Last Week	848	1,006		
Top 5 importers' share of U.S. corn export sales	68%	74%		
USDA forecast, April 2011	49,530	50,460	(2)	
Corn Use for Ethanol USDA forecast, Ethanol April 2011	127,000	116,027	9	

(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 Importers¹ of U.S. Soybeans

Week Ending 04/07/2011	Commitments ²		% change current MY from last MY	Exports ³ 2009/10
	2010/11 Current MY	2009/10 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	24,971	21,650	15	22,454
Mexico	2,562	2,489	3	3,276
Japan	1,950	1,990	(2)	2,347
EU-25	2,599	2,664	(2)	2,647
Taiwan	1,207	1,332	(9)	1,556
Top 5 importers	33,289	30,124	11	32,280
Total US soybean export sales	40,573	36,685	11	40,850
% of Projected	94%	90%		
Change from last week	130	158		
Top 5 importers' share of U.S. soybean export sales	82%	82%		
USDA forecast, April 2011	43,000	40,850	5	
Soybean Use for Biodiesel USDA forecast, April 2011	6,474	4,076	59	

(n) indicates negative number.

¹Based on FAS 2008/09 Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.³FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 15

Top 10 Importers¹ of All U.S. Wheat

Week Ending 04/07/2011	Total Commitments ²		% change current MY from last MY	Exports ³ 2009/10
	2010/11 Current MY	2009/10 Last MY		
	- 1,000 mt -			- 1,000 mt -
Nigeria	3,517	3,318	6	3,233
Japan	3,605	3,043	18	3,148
Mexico	2,616	1,884	39	1,975
Philippines	1,872	1,681	11	1,518
Korea, South	1,626	1,171	39	1,111
Taiwan	942	842	12	844
Venezuela	598	680	(12)	658
Colombia	793	521	52	575
Peru	934	496	88	567
Egypt	3,874	456	750	529
Top 10 importers	20,378	14,093	45	14,156
Total US wheat export sales	34,285	21,533	59	23,980
% of Projected	99%	90%		
Change from last week	902	425		
Top 10 importers' share of U.S. wheat export sales	59%	65%		
USDA forecast, April 2011	34,700	23,980	45	

(n) indicates negative number.

¹Based on FAS 2008/09 Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.³FAS 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 04/14/11	Previous Week ¹	Current Week as % of Previous	2011 YTD ¹	2010 YTD ¹	2011 YTD as % of 2010 YTD	Last 4-weeks as % of		Total ¹ 2010
							2010	3-yr. avg.	
Pacific Northwest									
Wheat	318	223	143	3,794	2,768	137	144	138	11,062
Corn	244	235	104	2,353	2,397	98	115	96	9,950
Soybeans	132	84	157	2,803	3,865	73	63	69	10,191
Total	694	541	128	8,950	9,031	99	105	100	31,203
Mississippi Gulf									
Wheat	181	169	107	1,722	1,058	163	147	156	4,199
Corn	516	633	82	7,881	7,800	101	97	93	29,794
Soybeans	210	408	52	8,781	7,604	115	163	140	22,519
Total	908	1,211	75	18,384	16,462	112	118	111	56,512
Texas Gulf									
Wheat	343	336	102	4,493	2,313	194	233	222	9,339
Corn	20	5	371	416	630	66	89	109	1,859
Soybeans	0	0	n/a	760	647	118	n/a	0	1,916
Total	363	341	106	5,670	3,591	158	204	199	13,115
Great Lakes									
Wheat	70	27	262	112	68	165	86	105	1,897
Corn	0	0	n/a	0	0	n/a	n/a	0	119
Soybeans	0	0	n/a	0	0	n/a	n/a	0	655
Total	70	27	262	112	68	165	86	95	2,672
Atlantic									
Wheat	59	18	321	406	96	423	273	204	343
Corn	0	9	0	89	108	82	97	66	469
Soybeans	6	14	47	367	650	56	60	99	1,417
Total	66	42	158	862	855	101	135	144	2,229
U.S. total from ports²									
Wheat	971	773	126	10,527	6,304	167	172	168	26,839
Corn	780	883	88	10,739	10,936	98	101	94	42,192
Soybeans	349	506	69	12,711	12,766	100	110	107	36,699
Total	2,100	2,161	97	33,977	30,006	113	122	117	105,730

¹ Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

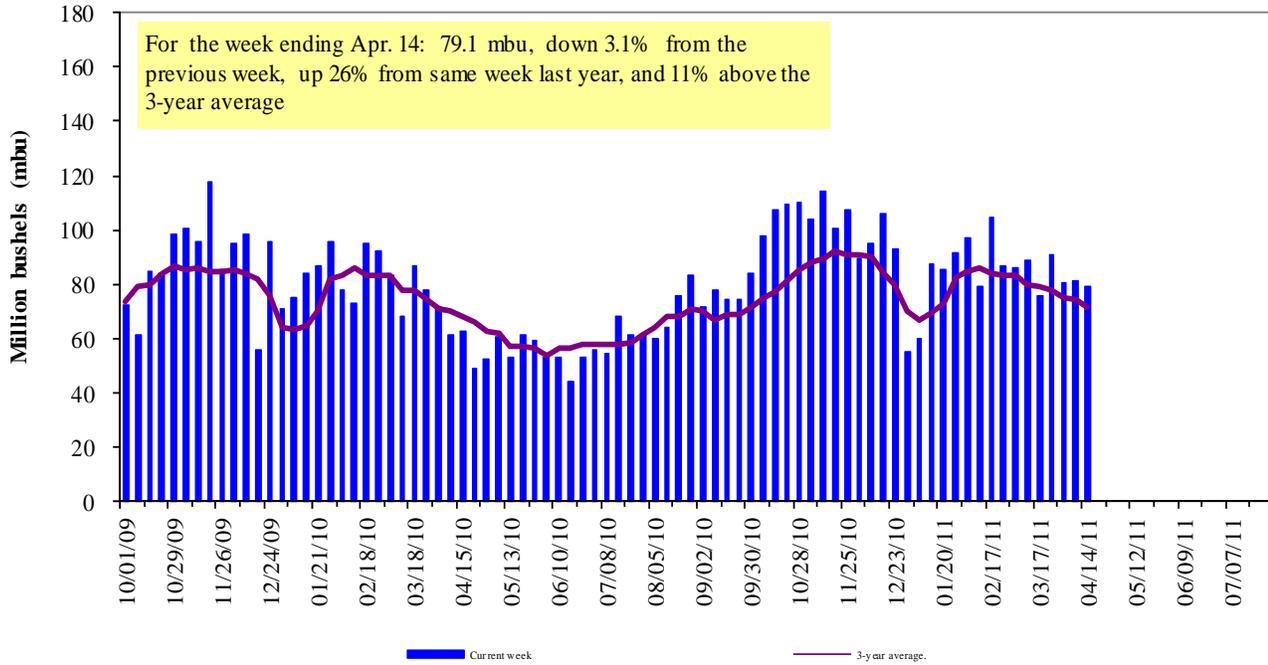
² Total includes only port regions shown above

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 61 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2010.

Figure 14

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

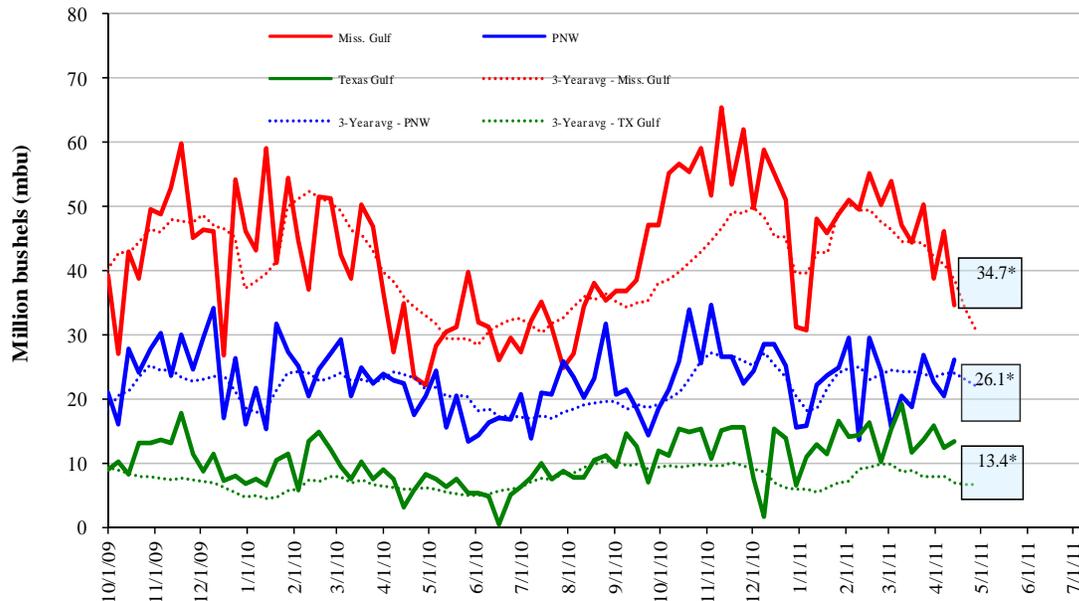


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW¹ (wheat, corn, and soybeans)



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

Apr. 14 % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	down 25	up 7	down 18	up 28
Last year (same week)	down 1	up 321	up 26	up 16
3-yr avg. (4-wk mov. avg.)	down 10	up 91	up 6	up 11

Ocean Transportation

Table 17

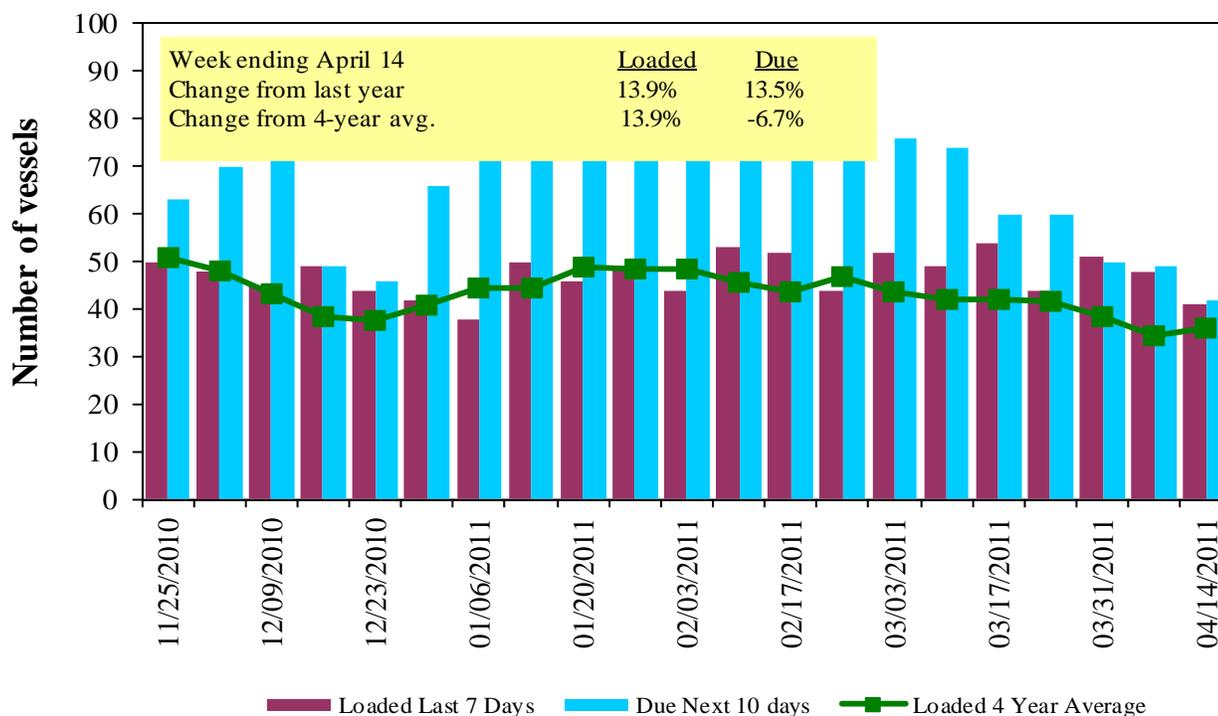
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
4/14/2011	28	41	42	25	17
4/7/2011	40	48	49	21	15
2010 range	(15..69)	(30..57)	(33..84)	(4..24)	(2..20)
2010 avg.	41	42	58	12	11

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

U.S. Gulf¹ Vessel Loading Activity

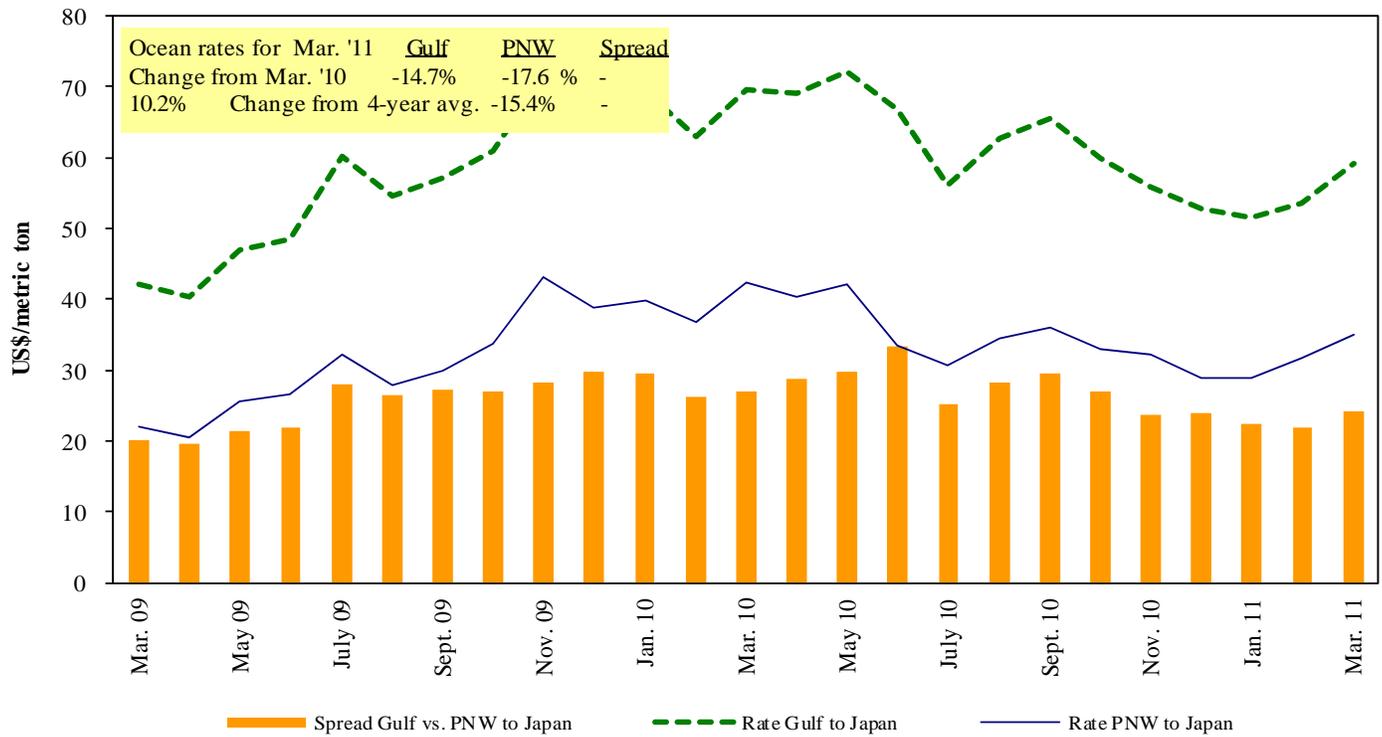


Source: Transportation & Marketing Programs/AMS/USDA

¹U.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 4/16/2011

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	May 1/10	55,000	56.00
U.S. Gulf	China	Heavy Grain	Mar 20/29	52,000	52.00
U.S. Gulf	China	Heavy Grain	Mar 8/15	55,000	53.60
U.S. Gulf	China	Heavy Grain	Feb 1/28	58,000	48.00
U.S. Gulf	China	Heavy Grain	Dec 22/31	55,000	57.00
U.S. Gulf	China	Heavy Grain	Dec 20/30	55,000	57.00
U.S. Gulf	China	Heavy Grain	Dec 1/5	55,000	63.00
U.S. Gulf	Isreal	Wheat	May 20/30	50,000	36.00
U.S. Gulf	Nicaragua	Corn/Soybean meal	Feb 7/17	24,000	56.42
U.S. Gulf	Nigeria	Wheat	Apr 17/23	25,000	46.50
U.S. Gulf	Djibouti ¹	Wheat	Mar 31/Apr 9	17,260	129.95
U.S. Gulf	Turkey	Heavy Grain	Jan 25/30	2,500	46.00
PNW	Pakistan	Heavy Grain	Jan 15/25	42,000	46.00
PNW	Rotterdam	Heavy Grain	Feb 15/25	55,000	26.00
Brazil	China	Heavy Grain	April 5/15	60,000	51.00
Brazil	China	Heavy Grain	April 1/15	55,000	47.00
River Plate	Algeria	Corn	Apr 15/25	25,000	41.50
River Plate	Algeria	Corn	April 15/25	30,000	41.50
River Plate	Morocco	corn	Feb 28/Mar 8	25,000	37.25
River Plate	Morocco	Heavy Grain	Apr 25/28	2,500	44.50
Uruguay	Algeria	Wheat	Feb 5/10	25,000	46.00

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

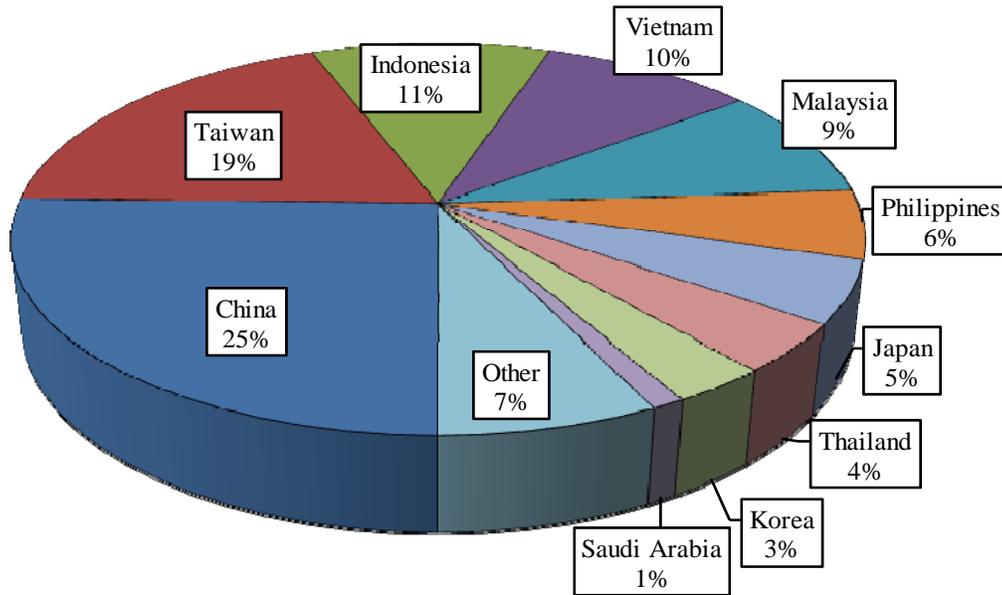
¹75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2010, containers were used to transport 5 percent of total U.S. waterborne grain exports, and 7 percent of U.S. grain exports to Asia. Asia is the top destination for U.S. containerized grain exports—94 percent in 2010.

Figure 18

Top 10 Destination Markets for U.S. Containerized Grain Exports, January 2011

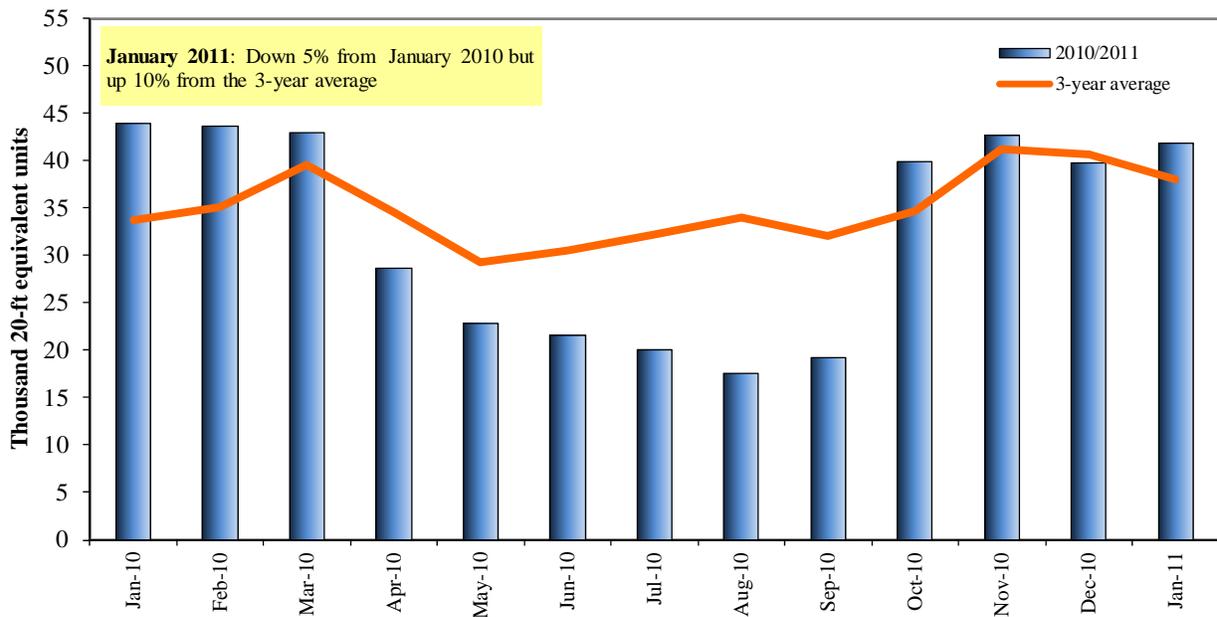


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements (recently added codes are highlighted in bold type): 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, **230330**, and **120810**.

Figure 19

Monthly Shipments of Containerized Grain to Asia



Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements (recently added codes are highlighted in bold type): 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, **230330**, and **120810**.

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