



September 22, 2011

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WEEKLY HIGHLIGHTS

[GTR Data Now Available on the Web](#)

As a convenience to readers, the Transportation Services Division of USDA's Agricultural Marketing Service has placed non-proprietary data sets underpinning the Grain Transportation Report (GTR) on the GTR webpage in Excel format. The new data now available on the GTR Web page will be updated on a weekly basis concurrently with the publication of the GTR and will include historical datasets for 14 tables and 11 figures. The data sets may be accessed from the link in the lower left column of the front page and from the link on the [GTR Webpage](#).

[Corn Harvest on Near-Average Pace](#)

As of September 18, 10 percent of this year's corn crop has been harvested, nearly the same as the 5-year average pace of 11 percent. Kansas has already harvested 32 percent of its corn crop, compared to the average of 24 percent. Missouri corn has been 34 percent harvested, ahead of its average 29 percent harvested pace. Other major corn producing States with higher-than-average harvest completions include North Carolina (78 percent) and Tennessee (59 percent). Southern States with early maturing crops are nearly completely harvested. The harvest paces for these States are as follows: Louisiana (100 percent), Mississippi (99 percent), Georgia (96 percent), Arkansas (85 percent), and Alabama (75 percent).

[Construction Begins on Tampa Ethanol Unit Train to Pipeline Facility](#)

CSX, Kinder Morgan Energy Partners, and the Tampa Port Authority announced a new project on Monday that will create a unit-train-to-pipeline system. Hundred-car unit trains will bring ethanol from the Midwest to Hooker's Point in the Port of Tampa, where Kinder Morgan will distribute the ethanol to blend terminals and new markets by pipeline. The project involves the construction of new rail track and infrastructure to handle the unit trains and a new multi-product unit train offloading yard. The facility will also create an on-dock unit train capability for containers. The rail facilities are scheduled to be operational by September 2012.

[Grain Inspections Rebound After Two Week Decline](#)

For the week ending September 15, total inspections of grain (corn, wheat, and soybeans) for export from all major U.S. export regions reached 1.64 million metric tons (mmt), up 62 percent from the previous week but 17 percent below last year this time. Grain inspections were the highest since May 26 (1.74 mmt). Wheat (.903 mmt) and corn (.507 mmt) jumped 116 and 51 percent from the past week. Shipments of wheat to Asia and Africa increased over the previous week, as did corn shipments to Asia. Inspections were also up in each of the three major export regions, to 21 percent above the 4-week running average. Outstanding export sales of each of the major grains were also up from last year.

Snapshots by Sector

Rail

U.S. railroads originated 17,286 **carloads of grain** during the week ending September 10, down 9 percent from last week, 17 percent from last year, and 19 percent lower than the 3-year average.

During the week ending September 15, average October **non-shuttle secondary railcar bids/offers** were \$125 above tariff, down \$25 from last week and \$445.50 lower than last year. Average shuttle rates were \$175 below tariff, down \$112.50 from last week and \$139.50 lower than last year.

Barge

During the week ending September 17, **barge grain movements** totaled 315,338 tons, 6.5 percent lower than the previous week and 31 percent lower than the same period last year.

During the week ending September 17, 202 grain barges **moved down river**, 7 percent less than last week; 389 grain barges were **unloaded in New Orleans**, down 7.4 percent from the previous week.

Ocean

During the week ending September 15, 34 **ocean-going grain vessels** were loaded in the Gulf, down 24 percent from last year. Forty-seven vessels are expected to be loaded within the next 10 days, 13 percent less than the same period last year.

During the week ending September 16, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$55.00 per metric ton (mt), up 2 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$34.50 per mt—1 percent less than the previous week.

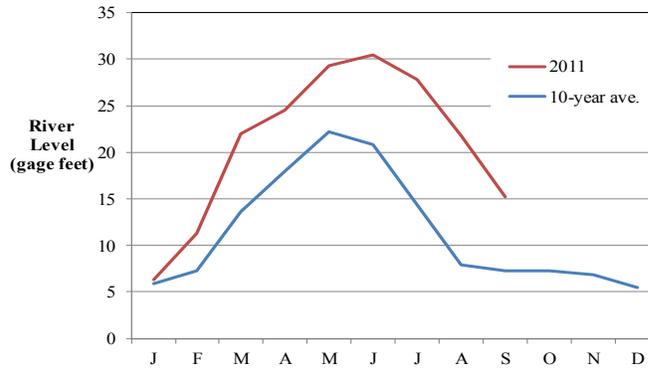
Fuel

During the week ending September 19, U.S. average **diesel fuel prices** decreased 3 cents to \$3.83 per gallon—0.8 percent lower than the previous week, but 29.5 percent higher than the same week last year.

Grain Exports Keep Pace with Last Year Despite Widespread Flooding

During 2011, most of the Mississippi River and its tributaries experienced high water that disrupted barge traffic. The widespread flooding began late last year when much of the North Central States had ample rain that saturated soils before the winter freeze. When the larger-than-average snowpack began to melt due to this year's springtime temperatures, the rapid snowmelt, combined with above-average rainfall, overwhelmed the streams and tributaries that feed the rivers, causing major flooding. While flooding occurred on a widespread portion of the inland waterways, this analysis only looks at the impact of high water on the St. Louis, MO, barge market. While St. Louis did not reach its record level of 49.5 feet that occurred in August 1993, there was record flooding at several locations below St. Louis, especially on the lower Mississippi River.

Figure 1: St. Louis, MO, Mississippi River water levels, 2011 compared to 2001-2010 average

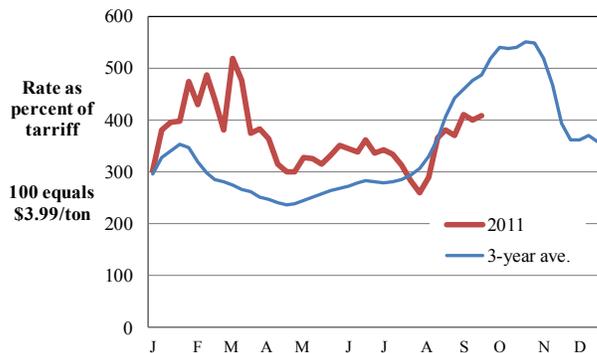


Source: U.S. Army Corps of Engineers

Figure 1 shows the 2011 St. Louis water levels (red line) have been much greater than the 10-year monthly average (blue line). The blue line shows the typical trend where levels increase throughout late winter and continue until a peak in May. Water levels normally decline rapidly from July through August and remain relatively stable for the remainder of year.

Nearly every day from mid-April to early August, barge traffic on the Mississippi River at St. Louis has been restricted because of high water. When the St. Louis water gage¹ exceeds 25 feet, mandatory Coast Guard restrictions are implemented. These restrictions may require barge operators to use larger towboats, tow fewer barges, or transit at reduced speeds, and they may limit navigation to only daylight hours. All of these factors add costs that result in increased barge rates. St. Louis barge rates were above average from January through July, spiking to 519 percent of tariff² in mid-March (Figure 2). Since August, rates have begun a typical increase in anticipation of the corn and soybean harvest. Because of the flooding, the weekly number of loaded downbound grain barges at Mississippi River Locks 27 (located near St. Louis) has been consistently below average with significant variations from week to week (see Figure 3). As

Figure 2: Weekly St. Louis, MO, grain barge rates, 2011 compared to 2007-10 average



Source: USDA-AMS-GTR

¹ Water levels are measured as gage height in feet above or below a zero level. A gage height of 25 feet does not necessarily imply a depth of 25 feet, but 25 feet of water above a reference level.

² Barge rates are expressed as percent of tariff. The St. Louis tariff is \$3.99 per ton, so a 519 percent tariff rate equals \$20.71 per ton.

of downbound grain barges increases from January to August, drops during late summer, then increases during October and November. Finally, as winter approaches, the number of barges decreases for the remainder of the year.

Despite the flooding, total year-to-date grain exports through the Mississippi River are about the same (98 percent) as last year (see GTR Table 16). Mississippi River wheat year-to-date totals are 45 percent higher than last year. Current year-to-date Mississippi River corn exports are 12 percent lower than last year at this time. Soybeans are 3 percent higher than last year's year-to-date total. Although navigation on the Mississippi River was restricted at times, the number of year-to-date grain barge deliveries to the export elevators were only 12 percent lower than last year at this time. Rail deliveries of grain to Mississippi River ports were 79 percent higher than last year.

In the September 12 World Agricultural Supply and Demand Estimates report, USDA projected wheat, corn, and soybean total exports in the coming crop year (2011/12) to be

4.09 billion bushels, 12 percent lower than the 2010/11 crop year. U.S. corn exports for 2011/12 are projected to be 1.650 billion bushels, 10 percent lower than last year. Soybean exports are projected to be 1.415 billion bushels, 80 million bushels less than last year. Barge operators have indicated that the market for barge services will likely be lackluster for the last half of September. As of September 18, only 10 percent of the corn harvest has been harvested, compared to the average of 11 percent at this time last year. Movements have been slower than expected. In August, barge operators were offering St. Louis barge services for the next month (September) at 505 percent of tariff. This week, the current St. Louis rate was only 407 percent of tariff. Nick.Marathon@ams.usda.gov

Figure 3: Weekly downbound number of barges, St. Louis, MO, 2011 and 2006-10 average



Source: U.S. Army Corps of Engineers

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

Week ending	Truck	Rail ²	Barge	Ocean	
				Gulf	Pacific
09/21/11	257	220	288	246	245
09/14/11	259	245	264	242	248

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)

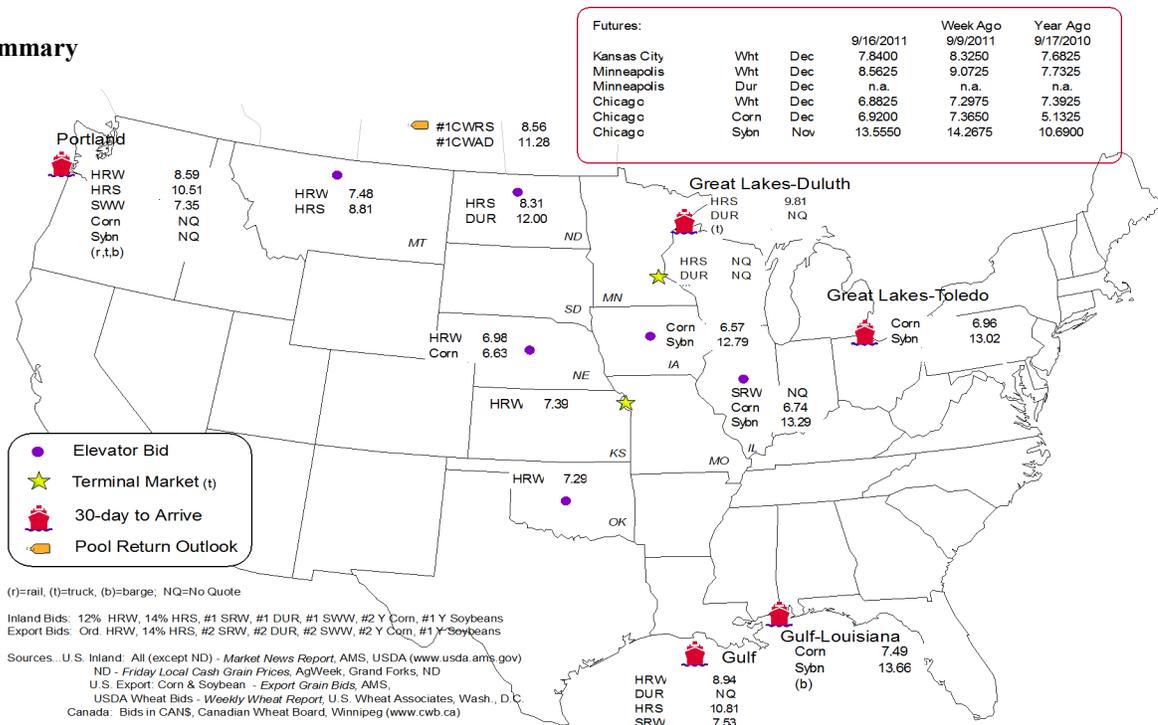
Commodity	Origin--Destination	9/16/2011	9/9/2011
Corn	IL--Gulf	-0.75	-0.70
Corn	NE--Gulf	-0.86	-0.86
Soybean	IA--Gulf	-0.87	-0.87
HRW	KS--Gulf	-1.55	-1.37
HRS	ND--Portland	-2.20	-2.44

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	
9/14/2011 ^p	110	1,654	1,270	1,601	32	4,667
9/07/2011 ^r	116	839	624	2,253	34	3,866
2011 YTD	22,189	66,085	33,958	130,379	16,948	269,559
2010YTD	12,376	52,812	32,457	120,266	19,013	236,924
2011 YTD as % of 2010 YTD	179	125	105	108	89	114
Last 4 weeks as % of 2010 ²	13	47	112	87	22	67
Last 4 weeks as % of 4-year avg. ²	11	50	139	66	12	58
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.

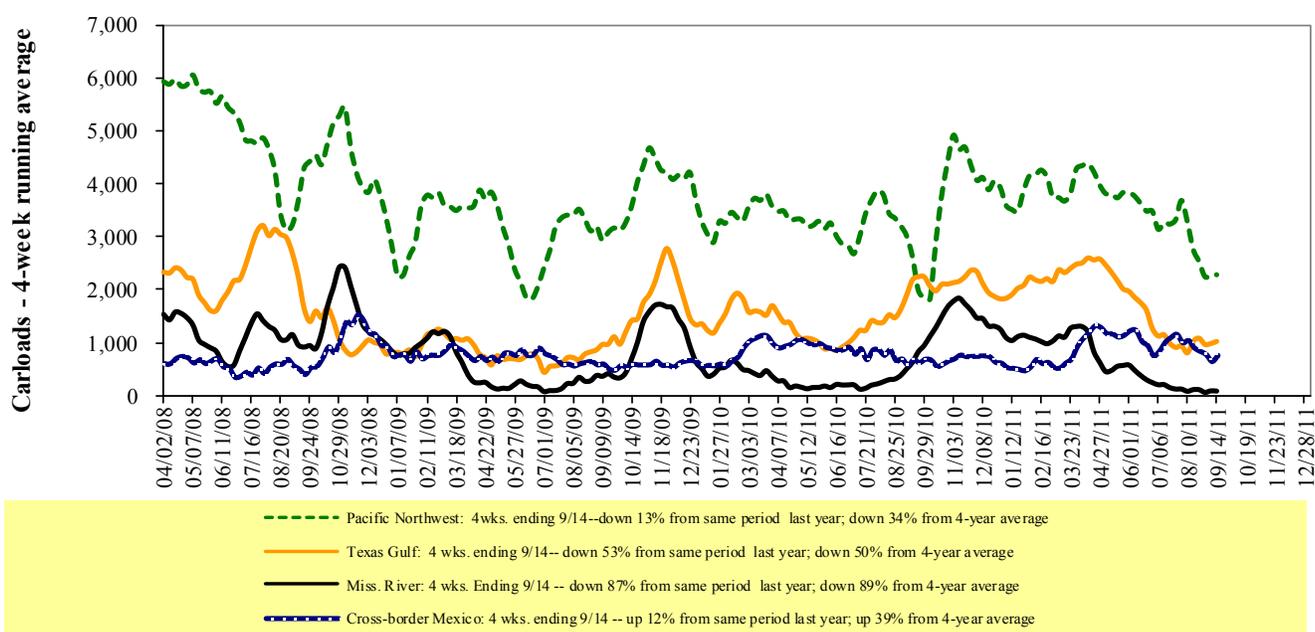
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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



Source: Transportation & Marketing Programs/AMS/USDA

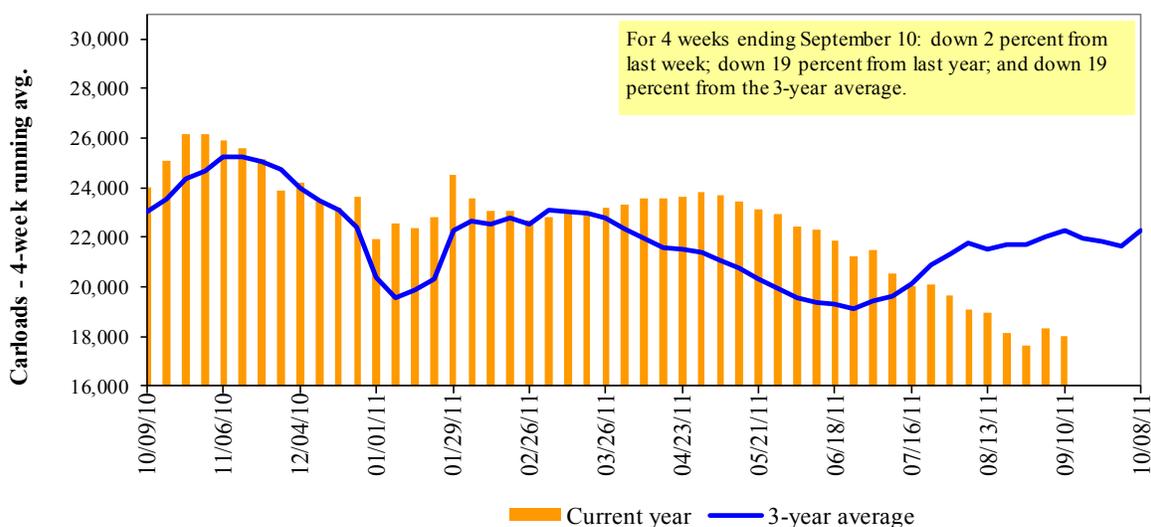
Table 4

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
09/10/11	617	1,777	9,432	594	4,866	17,286	3,112	4,322
This week last year	1,240	2,061	10,282	404	6,782	20,769	3,422	3,543
2011 YTD	65,591	104,585	379,503	24,098	210,196	783,973	136,877	183,296
2010 YTD	74,485	106,076	366,115	24,778	193,775	765,229	138,495	187,620
2011 YTD as % of 2010 YTD	88	99	104	97	108	102	99	98
Last 4 weeks as % of 2010 ¹	72	88	81	131	77	81	99	104
Last 4 weeks as % of 3-yr avg. ¹	63	81	83	106	83	82	94	106
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							
	Oct-11	Oct-10	Nov-11	Nov-10	Dec-11	Dec-10	Jan-12	Jan-11
9/15/2011								
BNSF ³								
COT grain units	no offer	no offer	no offer	no offer	no offer	no offer	no bids	187
COT grain single-car ⁵	0 . . 67	no offer	no bids	no offer	10 . . 21	no offer	1 . . 2	no offer
UP ⁴								
GCAS/Region 1	no bids	no offer	no bids	no offer	no bids	46	n/a	n/a
GCAS/Region 2	no bids	no offer	no bids	no bids	no bids	2	n/a	n/a

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.

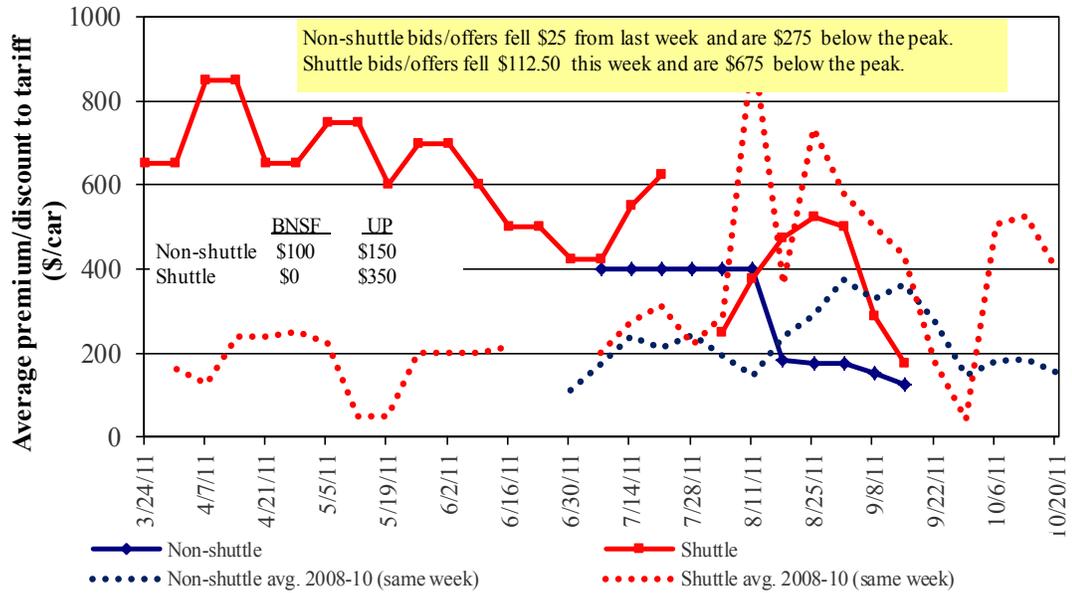
⁵Range is shown because average is not available. Not available = n/a.

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 October 2011, Secondary Market

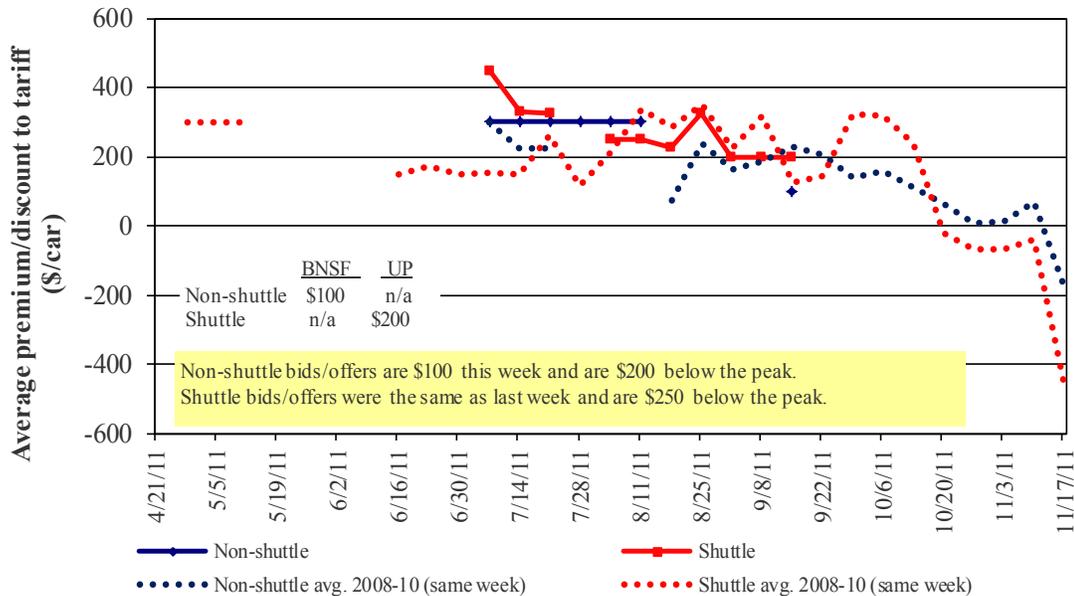


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

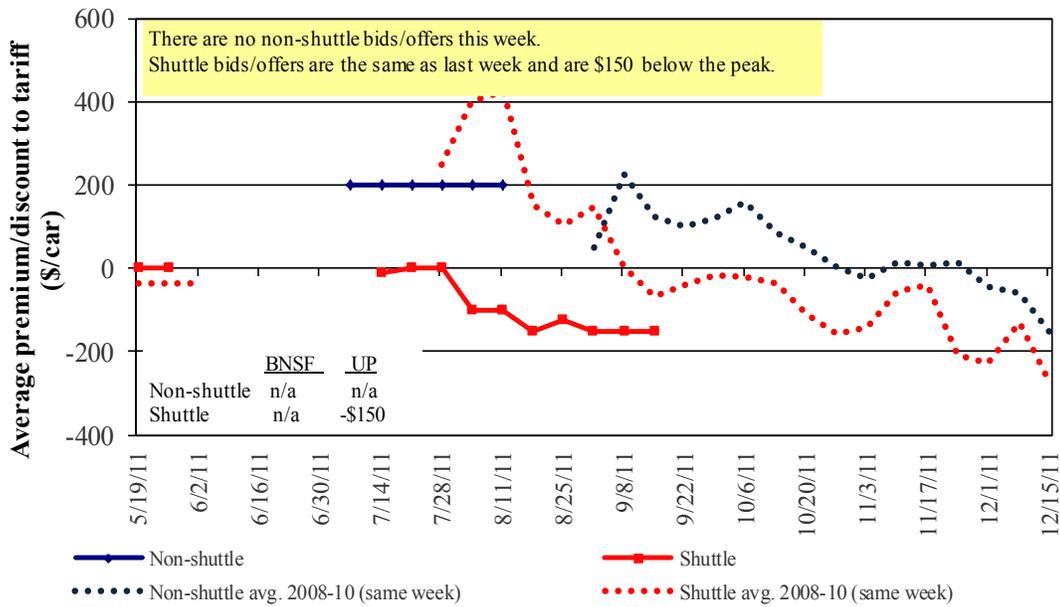


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in December 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					
	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12
Non-shuttle						
BNSF-GF	100	100	n/a	n/a	n/a	n/a
Change from last week	(50)	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	(683)	(333)	n/a	n/a	n/a	n/a
UP-Pool	150	n/a	n/a	n/a	n/a	n/a
Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	(208)	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	-	n/a	n/a	n/a	n/a	n/a
Change from last week	(175)	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	(379)	n/a	n/a	n/a	n/a	n/a
UP-Pool	350	200	(150)	n/a	n/a	n/a
Change from last week	(50)	-	-	n/a	n/a	n/a
Change from same week 2010	100	175	(50)	n/a	n/a	n/a

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

²Shuttle 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:				Fuel	Tariff plus surcharge per:		Percent	
9/6/2011	Origin region*	Destination region*	Tariff rate/car	surcharge per car	metric ton	bushel ²	change Y/Y ³	
Unit train								
Wheat	Wichita, KS	St. Louis, MO	\$2,992	\$187	\$31.57	\$0.86	11	
	Grand Forks, ND	Duluth-Superior, MN	\$3,097	\$107	\$31.82	\$0.87	19	
	Wichita, KS	Los Angeles, CA	\$5,710	\$551	\$62.17	\$1.69	10	
	Wichita, KS	New Orleans, LA	\$3,492	\$329	\$37.95	\$1.03	12	
	Sioux Falls, SD	Galveston-Houston, TX	\$5,410	\$452	\$58.21	\$1.58	6	
	Northwest KS	Galveston-Houston, TX	\$3,760	\$361	\$40.92	\$1.11	11	
	Amarillo, TX	Los Angeles, CA	\$3,959	\$502	\$44.30	\$1.21	12	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$2,812	\$372	\$31.62	\$0.86	8	
	Toledo, OH	Raleigh, NC	\$3,760	\$416	\$41.47	\$1.13	14	
	Des Moines, IA	Davenport, IA	\$1,843	\$79	\$19.08	\$0.52	-1	
	Indianapolis, IN	Atlanta, GA	\$3,196	\$312	\$34.84	\$0.95	12	
	Indianapolis, IN	Knoxville, TN	\$2,760	\$200	\$29.40	\$0.80	12	
	Des Moines, IA	Little Rock, AR	\$2,938	\$232	\$31.48	\$0.86	7	
	Des Moines, IA	Los Angeles, CA	\$4,835	\$675	\$54.71	\$1.49	20	
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,289	\$402	\$36.65	\$1.00	11	
	Toledo, OH	Huntsville, AL	\$2,921	\$295	\$31.94	\$0.87	11	
	Indianapolis, IN	Raleigh, NC	\$3,830	\$419	\$42.19	\$1.15	14	
	Indianapolis, IN	Huntsville, AL	\$2,613	\$200	\$27.94	\$0.76	11	
	Champaign-Urbana, IL	New Orleans, LA	\$3,406	\$372	\$37.52	\$1.02	18	
Shuttle Train								
Wheat	Great Falls, MT	Portland, OR	\$3,239	\$317	\$35.31	\$0.96	10	
	Wichita, KS	Galveston-Houston, TX	\$3,144	\$247	\$33.67	\$0.92	7	
	Chicago, IL	Albany, NY	\$3,497	\$390	\$38.60	\$1.05	-3	
	Grand Forks, ND	Portland, OR	\$4,702	\$547	\$52.13	\$1.42	10	
	Grand Forks, ND	Galveston-Houston, TX	\$5,745	\$570	\$62.71	\$1.71	11	
Corn	Northwest KS	Portland, OR	\$4,727	\$592	\$52.82	\$1.44	11	
	Minneapolis, MN	Portland, OR	\$4,680	\$666	\$53.09	\$1.44	14	
	Sioux Falls, SD	Tacoma, WA	\$4,640	\$610	\$52.14	\$1.42	13	
	Champaign-Urbana, IL	New Orleans, LA	\$2,677	\$372	\$30.28	\$0.82	7	
	Lincoln, NE	Galveston-Houston, TX	\$3,190	\$356	\$35.21	\$0.96	10	
	Des Moines, IA	Amarillo, TX	\$3,330	\$291	\$35.96	\$0.98	8	
	Minneapolis, MN	Tacoma, WA	\$4,680	\$661	\$53.04	\$1.44	14	
	Council Bluffs, IA	Stockton, CA	\$4,080	\$684	\$47.31	\$1.29	13	
	Soybeans	Sioux Falls, SD	Tacoma, WA	\$4,840	\$610	\$54.12	\$1.47	8
		Minneapolis, MN	Portland, OR	\$4,830	\$666	\$54.58	\$1.49	9
Fargo, ND		Tacoma, WA	\$4,730	\$543	\$52.36	\$1.43	8	
Council Bluffs, IA		New Orleans, LA	\$3,710	\$429	\$41.10	\$1.12	15	
Toledo, OH		Huntsville, AL	\$2,536	\$295	\$28.12	\$0.77	13	
Grand Island, NE	Portland, OR	\$4,520	\$606	\$50.90	\$1.39	9		

¹A 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.

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

³Percentage 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		Percent change Y/Y ⁴	
				surcharge per car ²	Tariff plus surcharge per: metric ton ³ bushel ³		
Wheat	MT	Chihuahua, CI	\$7,491	\$579	\$82.46	\$2.24	9
	OK	Cuautitlan, EM	\$6,610	\$606	\$73.73	\$2.00	12
	KS	Guadalajara, JA	\$7,210	\$861	\$82.47	\$2.24	11
	TX	Salinas Victoria, NL	\$3,656	\$246	\$39.88	\$1.08	13
Corn	IA	Guadalajara, JA	\$7,445	\$881	\$85.06	\$2.16	11
	SD	Penjamo, GJ	\$7,245	\$757	\$81.77	\$2.07	8
	NE	Queretaro, QA	\$6,802	\$779	\$77.46	\$1.97	14
	SD	Salinas Victoria, NL	\$5,360	\$576	\$60.65	\$1.54	13
	MO	Tlalnepantla, EM	\$5,959	\$759	\$68.64	\$1.74	15
	SD	Torreon, CU	\$6,248	\$634	\$70.32	\$1.78	13
Soybeans	MO	Bojay (Tula), HG	\$6,705	\$772	\$76.39	\$2.08	10
	NE	Guadalajara, JA	\$7,519	\$876	\$85.78	\$2.33	14
	IA	El Castillo, JA ⁵	\$7,770	\$753	\$87.08	\$2.37	12
	KS	Torreon, CU	\$6,042	\$601	\$67.87	\$1.85	15
Sorghum	OK	Cuautitlan, EM	\$5,350	\$575	\$60.54	\$1.54	18
	TX	Guadalajara, JA	\$6,289	\$493	\$69.29	\$1.76	11
	NE	Penjamo, GJ	\$6,905	\$810	\$78.83	\$2.00	8
	KS	Queretaro, QA	\$6,038	\$538	\$67.18	\$1.70	13
	NE	Salinas Victoria, NL	\$4,818	\$511	\$54.45	\$1.38	13
NE	Torreon, CU	\$5,804	\$641	\$65.85	\$1.67	11	

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

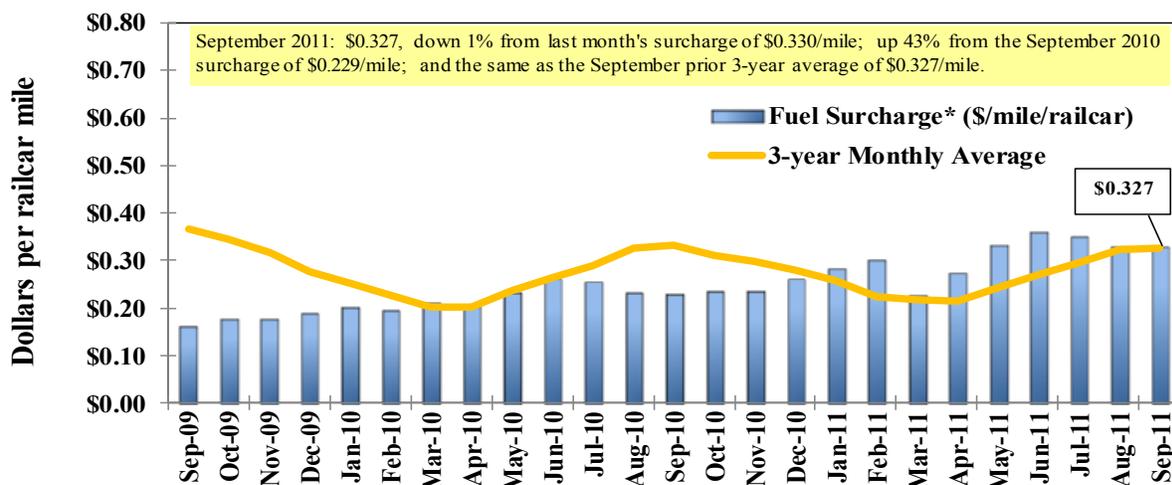
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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.

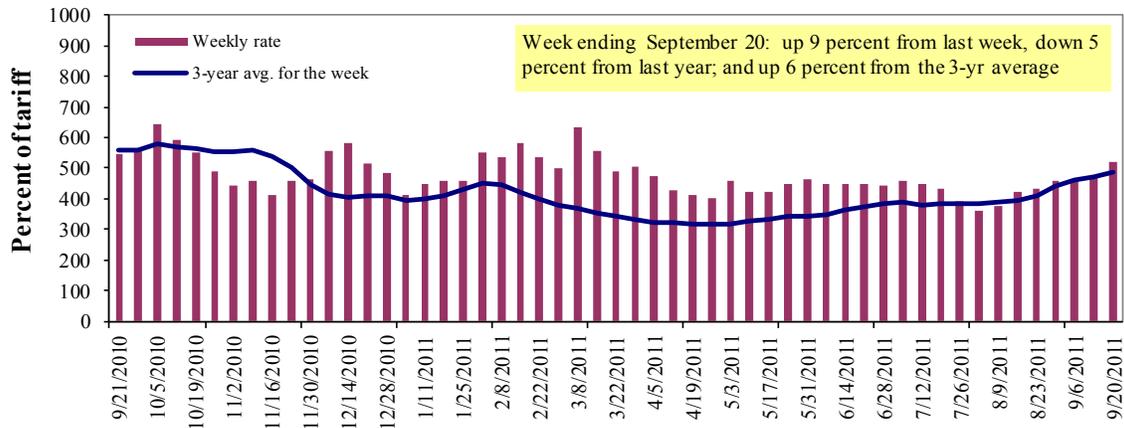
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

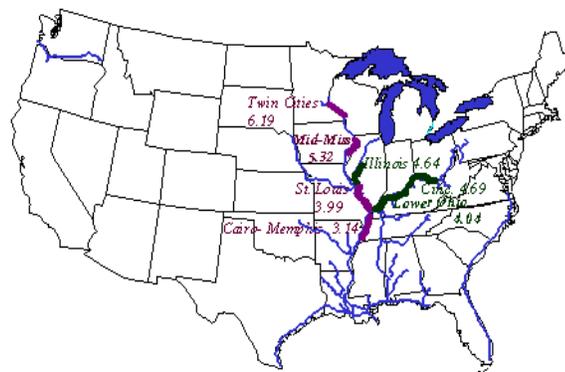
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	9/20/2011	517	517	518	407	492	492	395
	9/13/2011	485	478	475	400	478	478	395
\$/ton	9/20/2011	32.00	27.50	24.04	16.24	23.07	19.88	12.40
	9/13/2011	30.02	25.43	22.04	15.96	22.42	19.31	12.40
Current week % change from the same week:								
	Last year	-3	-1	-5	-19	-16	-16	-15
	3-year avg. ²	8	7	6	-14	-7	-7	-15
Rate¹	October	590	572	567	480	580	580	455
	December	--	--	470	388	453	453	350

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



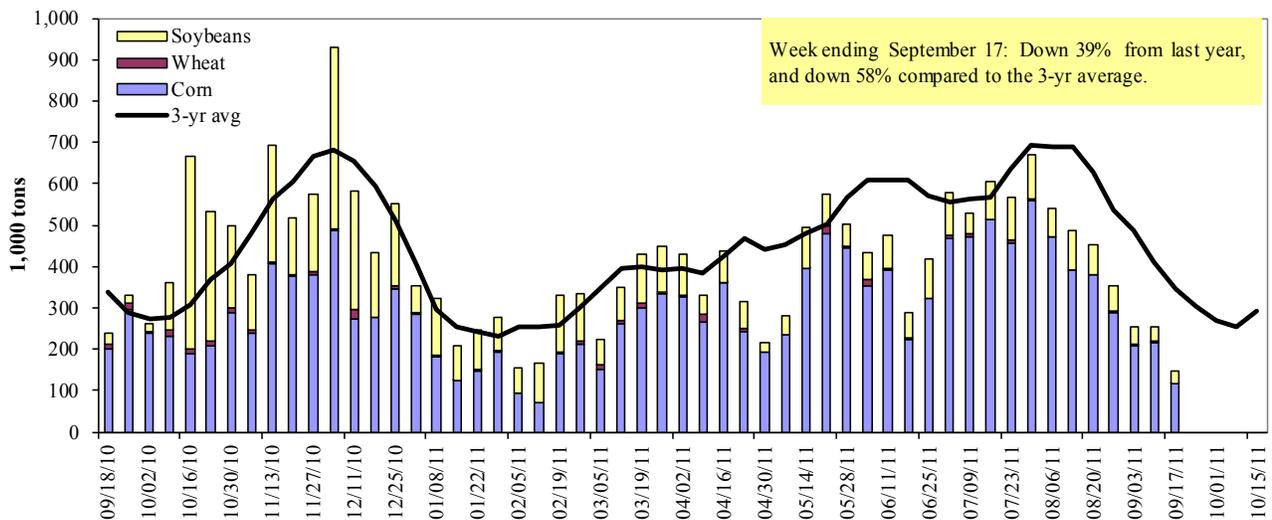
Calculating barge rate per ton:

(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 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/mvrirmi/omni/webprts/default.asp)

Table 10

Barge Grain Movements (1,000 tons)

Week ending 9/17/2011	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	49	6	20	0	75
Winfield, MO (L25)	51	3	8	0	62
Alton, IL (L26)	96	3	23	0	122
Granite City, IL (L27)	115	3	28	0	146
Illinois River (L8)	40	0	1	0	41
Ohio River (L52)	78	13	40	0	130
Arkansas River (L1)	11	17	9	1	39
Weekly total - 2011	204	33	77	1	315
Weekly total - 2010	367	31	48	13	460
2011 YTD ¹	13,655	1,183	4,901	287	20,026
2010 YTD	17,201	962	5,280	336	23,779
2011 as % of 2010 YTD	79	123	93	85	84
Last 4 weeks as % of 2010 ²	69	104	131	91	79
Total 2010	22,768	1,220	10,373	481	34,841

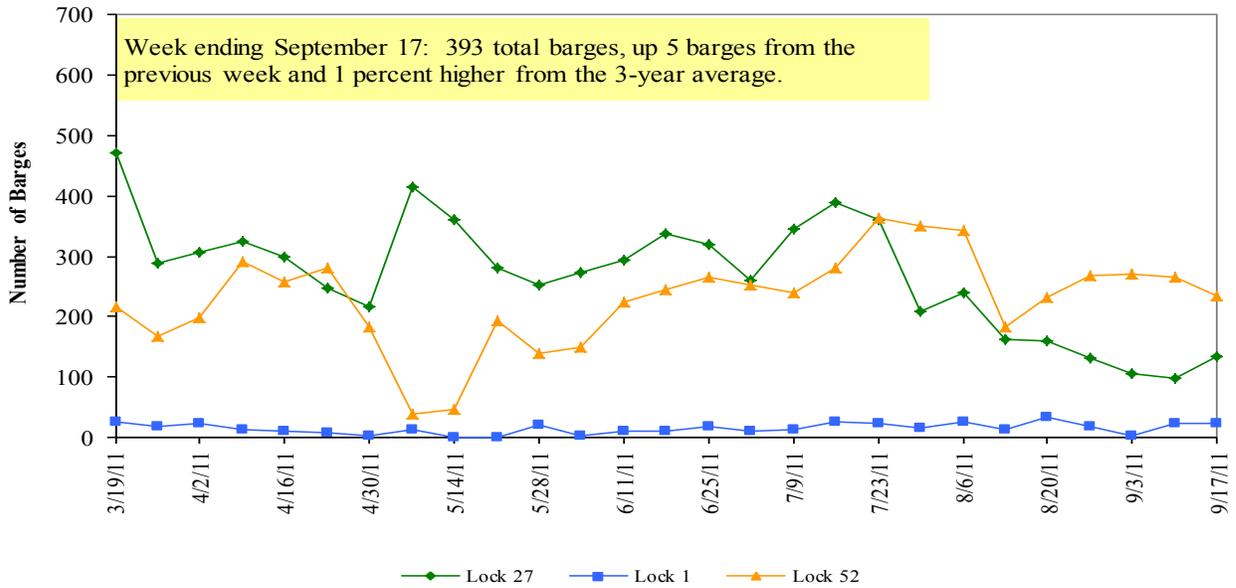
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2010.

Note: Total may not add exactly, due to rounding

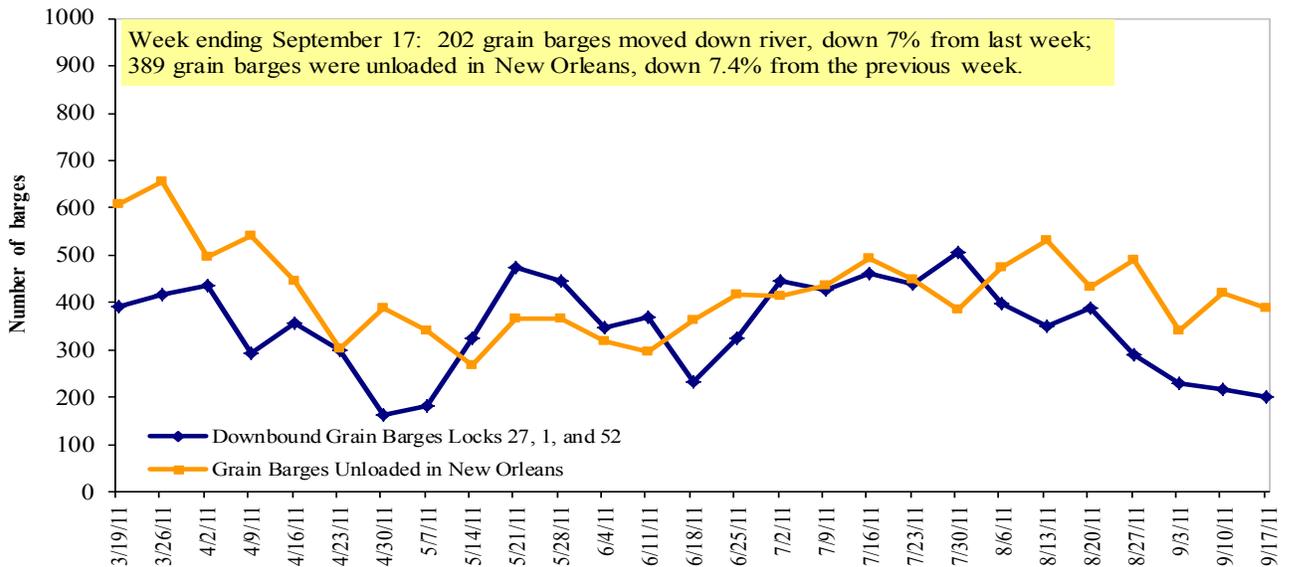
Source: U.S. Army Corps of Engineers (www.mvr.usace.army.mil/mvrirmi/omni/webprts/default.asp)

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 9/19/2011 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.853	-0.026	0.904
	New England	3.983	-0.002	0.986
	Central Atlantic	3.968	-0.017	0.927
	Lower Atlantic	3.792	-0.033	0.887
II	Midwest ²	3.799	-0.042	0.855
III	Gulf Coast ³	3.765	-0.025	0.875
IV	Rocky Mountain	3.892	-0.011	0.855
V	West Coast	3.977	-0.007	0.857
	California	4.062	-0.005	0.912
Total	U.S.	3.833	-0.029	0.873

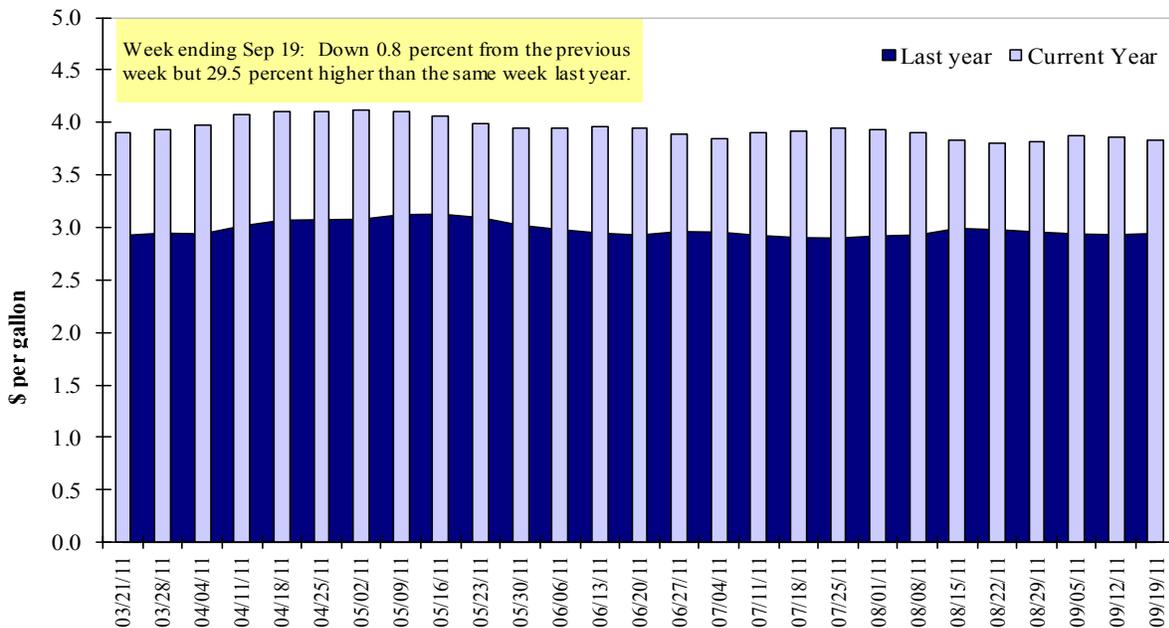
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
9/8/2011	1,632	663	1,527	1,009	83	4,914	13,813	14,332	33,059
This week year ago	3,506	598	2,177	1,385	373	8,039	14,588	18,201	40,828
Cumulative exports-marketing year²									
2010/11 YTD	3,533	1,166	1,945	1,383	188	8,214	621	346	9,181
2009/10 YTD	3,702	560	1,828	1,162	221	7,474	1,385	254	9,113
YTD 2010/11 as % of 2009/10	95	208	106	119	85	110	45	136	101
Last 4 wks as % of same period 2009/10	49	113	70	74	33	63	60	46	55
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 is 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 09/08/11	Total Commitments ²		% change current MY from last MY	Exports ³ 2010/11
	2011/12 Current MY	2010/11 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,688	4,752	(43)	14,279
Mexico	2,510	2,326	8	7,019
Korea	855	1,113	(23)	6,104
Egypt	232	1,121	(79)	3,302
Taiwan	564	652	(14)	2,393
Top 5 importers	6,849	9,964	(31)	33,096
Total US corn export sales	14,434	15,973	(10)	46,610
% of Projected	34%	34%		
Change from Last Week	1,127	584		
Top 5 importers' share of U.S. corn export sales	47%	62%		
USDA forecast, September 2011	41,910	46,610	(10)	
Corn Use for Ethanol USDA forecast, Ethanol September 2011	127,000	116,612	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 09/08/2011	Total Commitments ²		% change current MY from last MY	Exports ³ 2010/11
	2011/12 Current MY	2010/11 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	10,392	10,579	(2)	24,445
Mexico	569	764	(25)	3,215
Japan	511	627	(19)	1,887
EU-25	124	65	90	2,607
Indonesia	402	352	14	1,397
Top 5 importers	11,998	12,388	(3)	33,551
Total US soybean export sales	14,678	18,455	(20)	40,690
% of Projected	38%	45%		
Change from last week	352	669		
Top 5 importers' share of U.S. soybean export sales	82%	67%		
USDA forecast, September 2011	38,510	40,690	(5)	
Soybean Use for Biodiesel USDA forecast, September 2011	8,632	5,755	50	

(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 09/08/2011	Total Commitments ²		% change current MY from last MY	Exports ³ 2010/11
	2011/12 Current MY	2010/11 Last MY		
	- 1,000 mt -			- 1,000 mt -
Nigeria	1,411	1,511	(7)	3,233
Japan	1,776	1,613	10	3,148
Mexico	1,593	1,345	18	2,601
Philippines	1,158	1,166	(1)	1,518
Korea	548	932	(41)	1,111
Peru	470	533	(12)	923
Taiwan	308	344	(10)	913
Colombia	286	359	(20)	783
Indonesia	374	318	18	781
Yemen	220	192		659
Top 10 importers	8,144	8,312	(2)	15,670
Total US wheat export sales	13,128	15,512	(15)	33,439
% of Projected	47%	44%		
Change from last week	413	475		
Top 10 importers' share of U.S. wheat export sales	62%	54%		
USDA forecast, September 2011	27,896	35,080	(20)	

(n) indicates negative number.

¹ Modified from the FAS 2010/11 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 09/15/11	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	445	212	210	10,583	7,606	139	131	120	11,062
Corn	62	82	76	6,918	8,029	86	26	35	9,950
Soybeans	0	136	0	3,787	5,044	75	123	149	10,191
Total	507	430	118	21,288	20,679	103	76	84	31,203
Mississippi Gulf									
Wheat	124	88	140	4,021	2,777	145	95	77	4,199
Corn	434	254	171	18,556	20,975	88	63	73	29,794
Soybeans	217	118	184	10,877	10,545	103	68	81	22,519
Total	775	460	168	33,454	34,297	98	67	75	56,512
Texas Gulf									
Wheat	315	90	351	9,152	6,002	152	69	93	9,339
Corn	0	0	n/a	810	1,285	63	0	0	1,859
Soybeans	0	0	n/a	763	669	114	0	0	1,916
Total	315	90	351	10,725	7,956	135	61	76	13,115
Great Lakes									
Wheat	17	26	63	787	866	91	27	36	1,897
Corn	11	0	n/a	134	53	256	0	61	119
Soybeans	0	0	n/a	22	0	n/a	0	n/a	655
Total	27	26	105	944	919	103	33	39	2,672
Atlantic									
Wheat	3	2	158	646	195	332	n/a	14	343
Corn	0	0	n/a	194	286	68	0	0	469
Soybeans	9	0	1,988	486	716	68	209	76	1,417
Total	12	2	500	1,326	1,197	111	38	23	2,229
U.S. total from ports²									
Wheat	903	418	216	25,189	17,446	144	88	93	26,839
Corn	507	336	151	26,612	30,628	87	49	58	42,192
Soybeans	226	255	89	15,935	16,974	94	80	94	36,699
Total	1,637	1,009	162	67,736	65,048	104	67	76	105,730

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

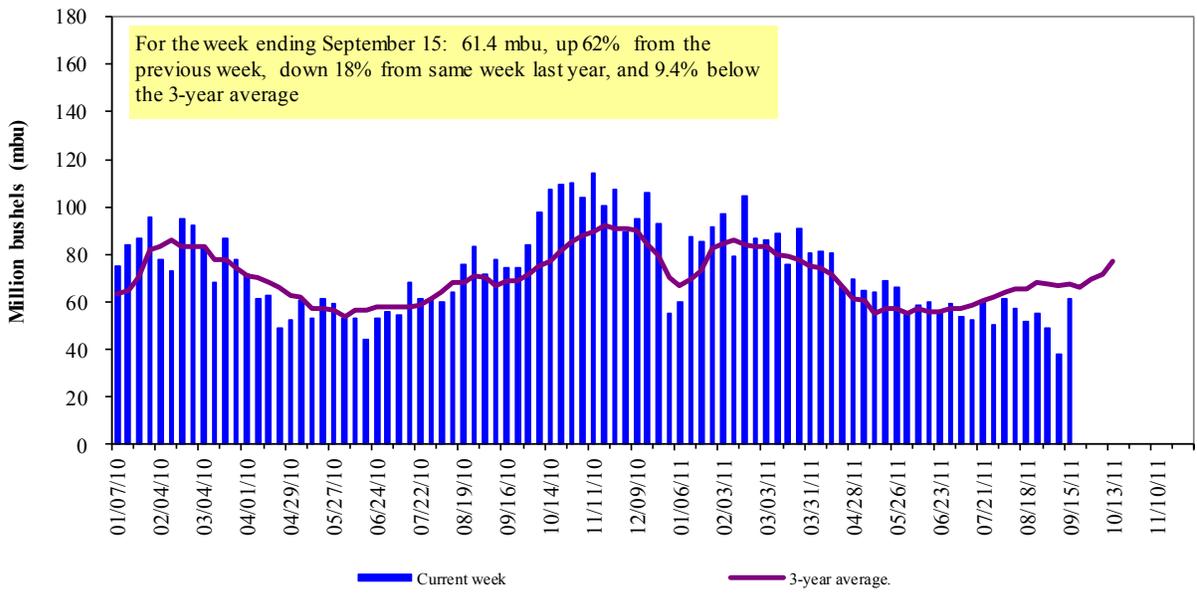
² Total includes only port regions shown above

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)

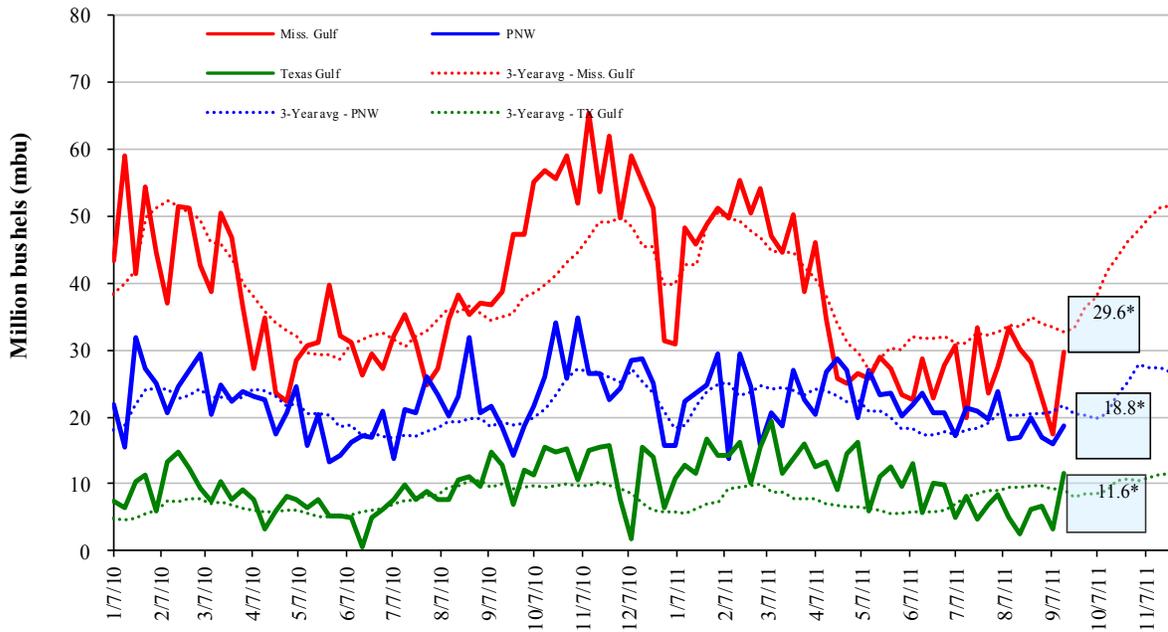


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

September 15 % change from:	MS.Gulf	TX_Gulf	U.S.Gulf	PNW
Last week	up 69	up 251	up 97	up 17
Last year (same week)	down 23	down 9	down 20	up 1
3-yr avg. (4-wk mov. avg.)	down 9	up 25	down 2	down 15

Ocean Transportation

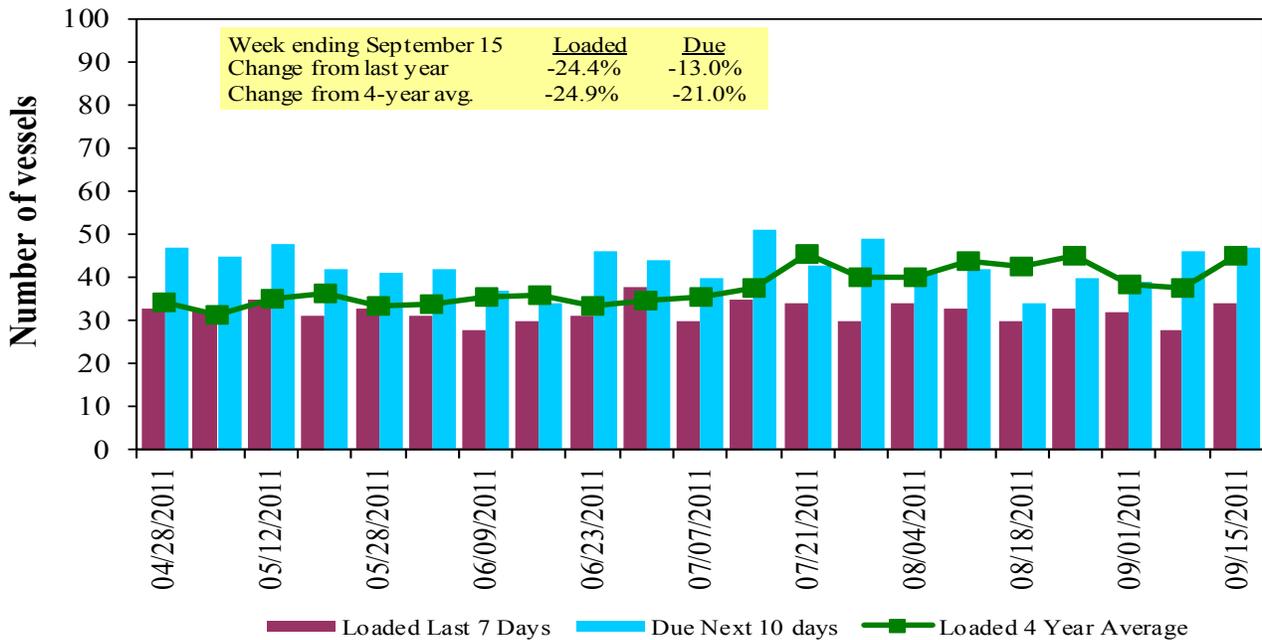
Table 17

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
9/15/2011	22	34	47	12	10
9/8/2011	22	28	46	13	7
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. Gulf^d Vessel Loading Activity

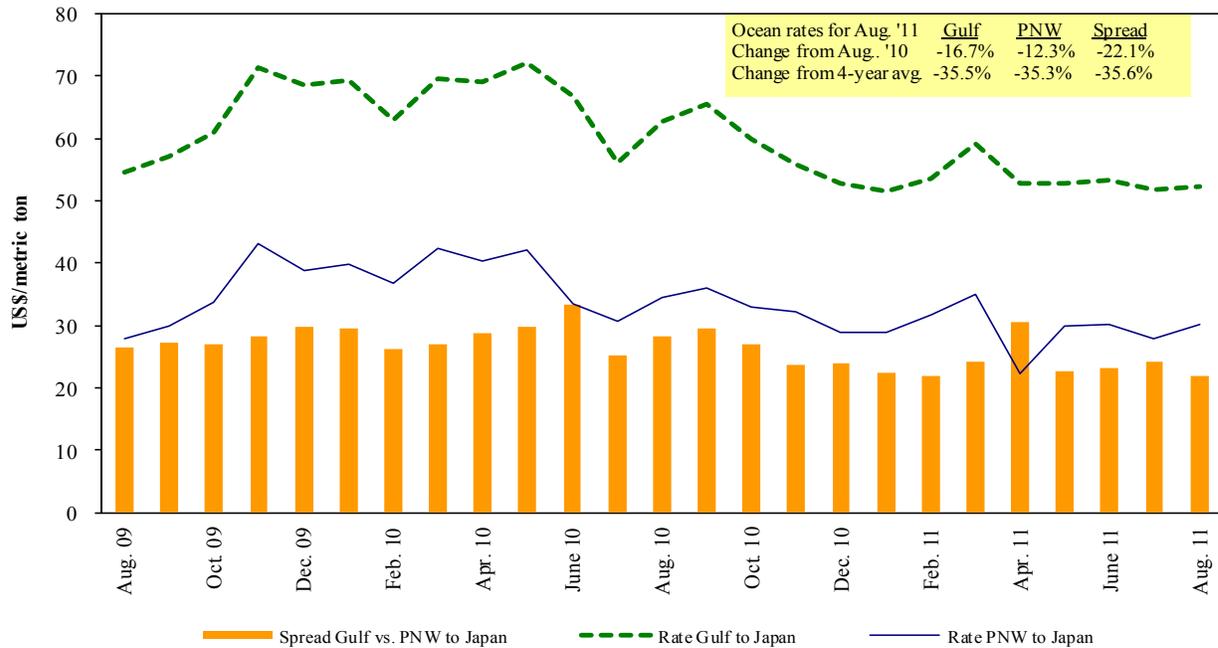


Source: Transportation & Marketing Programs/AMS/USDA

^dU.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 09/17/2011

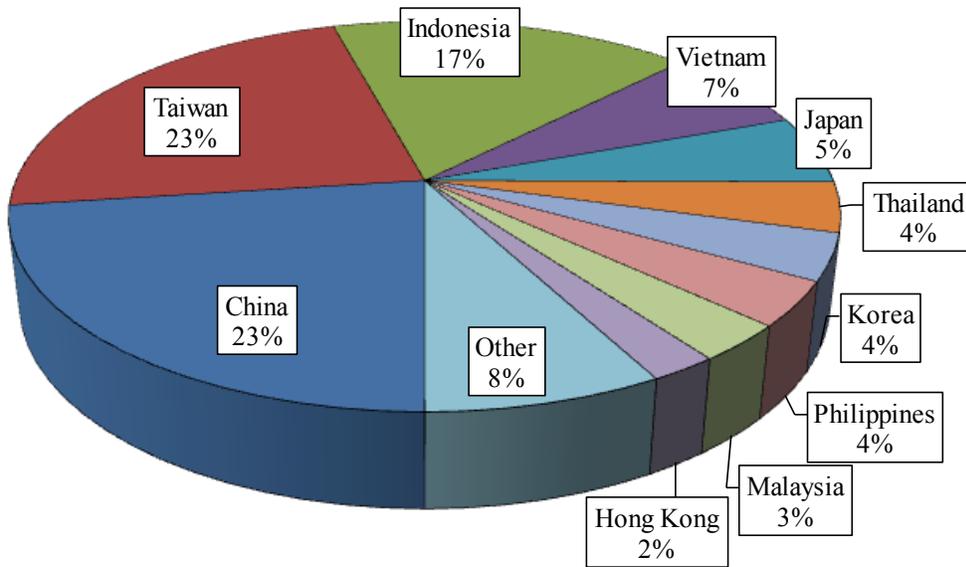
Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Oct 5/10	60,000	59.00
U.S. Gulf	China	Heavy Grain	Sep 15/30	60,000	54.00
U.S. Gulf	China	Heavy Grain	Sep 1/10	60,000	48.25
U.S. Gulf	China	Heavy Grain	Aug 17/Sep 30	60,000	49.00
U.S. Gulf	China	Heavy Grain	Dec 1/30	55,000	51.00
U.S. Gulf	Egypt	Grain	May 1/10	60,000	28.50
U.S. Gulf	Japan	Heavy Grain	June 1/12	54,000	52.50
U.S. Gulf	Israel	Wheat	May 20/30	50,000	36.00
U.S. Gulf	Djibouti ¹	Wheat	Mar 31/Apr 9	17,260	129.95
Brazil	China	Heavy Grain	May 18/27	60,000	49.50
Brazil	Turkey	Heavy Grain	May 20/30	50,000	32.00
France	Algeria	Wheat	Sep 25/30	25,000	24.50
River Plate	Algeria	Corn	July 15/25	25,000	43.50
River Plate	Algeria	Corn	July 1/10	25,000	42.90
River Plate	Algeria	Corn	June 15/25	25,000	42.75
River Plate	Algeria	Wheat	Aug 18/25	25,000	49.00
River Plate	Spain	Maize	May 16/18	25,000	44.00
South Africa	Taiwan	Corn	Aug 5/15	55,000	31.00
Ukraine	Spain Med	Corn	May 20/24	25,000	18.00

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

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, June 2011

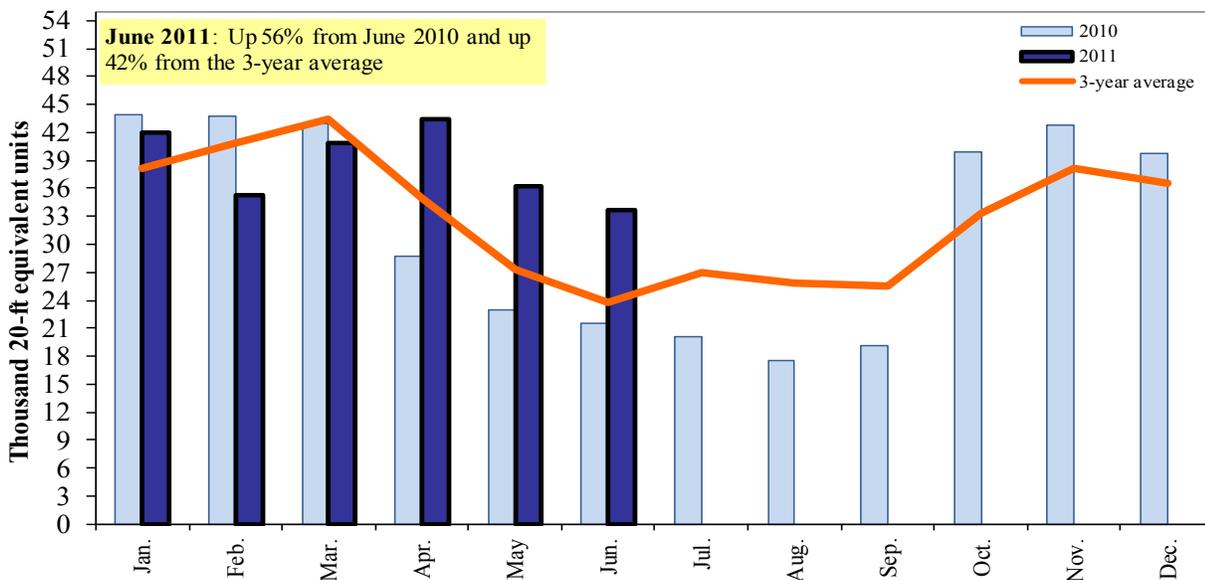


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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