



Grain Transportation Report

A weekly publication of the
Transportation and Marketing Programs/Transportation Services Branch
www.ams.usda.gov/tmdtsb/grain

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November 22, 2007

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WEEKLY HIGHLIGHTS

Barge Grain Shipments Top 1 Million Tons Again

For the second consecutive week, barge grain traffic topped 1 million tons. During the week ending November 17, **barge grain shipments** on the Mississippi River system totaled 1.076 million tons, an increase of 0.4 percent from the previous week's 1.072 million tons, and 18 percent from the same week last year.

Grain Inspections Down Overall, but Higher in the Mississippi Gulf

During the week of November 15, total **inspections** of corn, wheat, and soybeans for export from all major U.S. ports totaled 2.33 million metric tons (mmt), down 2 percent from a week ago, but 9 percent higher than last year and just 1 percent below the 3-year average. Grain inspections in the Mississippi Gulf, however, increased 14 percent to 1.39 mmt.

Rail Grain Deliveries to U.S. Ports Remain Strong

Rail grain deliveries to U.S. ports remain unusually large due to strong world demand for U.S. grain. For the 4 weeks ending November 14, rail deliveries were down 4 percent from the prior 4-week average, but 27 percent higher than last year and 29 percent higher than the 3-year average. As of November 8—only 10 weeks into the marketing year—export commitments for **corn** (30.7 mmt) and **soybean** (14.4 mmt) are at 51 percent and 54 percent, respectively, of the projected marketing year total. **Wheat** export commitments (27 mmt) are at 86 percent of the projected total.

October Grain Inspections Reach Record

According to the Grain Inspection, Packers and Stockyards Administration, export grain inspections from all U.S. port regions, including movements across U.S. land borders, reached a record 520 million bushels in October, 19 percent higher than the prior month and 20 percent above October 2006. The increase was fueled mainly by record Pacific Northwest (PNW) grain inspections (126 million bushels), which were 85 percent higher than the previous month and 26 percent higher than last October. PNW grain inspections were destined mainly for Asia, with record volumes of wheat (140 million bushels) and corn (205 million bushels).

Agricultural Refrigerated Truck Quarterly Report (AgRTQ) Published The 3rd quarter 2007 AgRTQ is now available on-line. This report provides a view of U.S. regional refrigerated truckload movements. The AgRTQ tracks volume and rates for major U.S. fresh fruit and vegetable industry producing regions and consuming markets. This quarter's issue includes a feature article on U.S.-Mexico Fresh Produce Trade. The report can be viewed at: <http://www.ams.usda.gov/tmd2/rtq/>

Snapshot by Sector

Rail

During the week ending November 10, U.S. railroads originated 26,924 **carloads of grain**, down 6 percent from last week, but 14 percent higher than last year and 17 percent higher than the 3-year average.

Ocean

During the week ending November 15, 59 **grain vessels were loaded** in the Gulf, up 34 percent from last year. Sixty-eight vessels were due within the next ten days, unchanged from last year.

In the week ending November 14, the cost of shipping grain from the Gulf to Japan was \$118 per mt, up 3 percent from last week. The cost from the PNW was \$90 per mt, down 2 percent.

Export Sales

During the week ending November 8, export sales of corn, soybeans, and wheat totaled 3.1 mmt, 44 percent higher than last week.

Fuel

During the week ending November 19, the average U.S. **diesel fuel price** was \$3.41 per gallon—0.4 percent less than the previous week and 34 percent higher than last year.

Feature Article/Calendar

Funding Process Begins for the Upper Mississippi River System NESP

Now that the Water Resource Development Act (WRDA) of 2007 has been authorized, the U.S. Army Corps of Engineers (Corps) will seek funding for new locks on the Upper Mississippi River and Illinois Waterway. The *Upper Mississippi River System Navigation and Ecosystem Sustainability Program (NESP)*

proposes the construction of seven new locks at a cost \$1.95 billion (in October 2006 dollars). The table shows the Corps' possible construction schedule for the seven locks. The Corps views these starting dates as an "optimistic" financial schedule. Although WRDA 2007 is now law, the earliest possible Construction General (CG) appropriations for NESP will likely not occur before FY 2009. CG is a Corps category of funding intended for new construction and major rehabilitation of locks and dams. Another funding category—Preconstruction Engineering and Design (PED)—is necessary for project development, preliminary engineering analyses, environmental impact documentation, location surveys, and right-of-way mapping. The Corps has already received PED funding for three of the locks in 2005. NESP and all other civil works projects are currently under continuing resolution funding. Proponents of NESP are hoping that Congress will include some FY 2008 PED funding for the project. Nick.Marathon@usda.gov

Mississippi River and Illinois Waterway Lock Plan

	PED* start	Construction start	Completion	Cost millions
Mississippi River Locks				
Lock 22	2005	2010	2018	\$232.30
Lock 25	2005	2010	2019	\$324.40
Lock 24	2010	2014	2022	\$309.90
Lock 21	2010	2014	2022	\$322.50
Lock 20	2013	2017	2025	\$221.40
Illinois Waterway Locks				
LaGrange	2005	2012	2022	\$261.30
Peoria	2015	2018	2027	\$262.60

*- Preconstruction Engineering and Design (PED)

Note: There is no Lock 23.

Trans-Pacific Carriers Claiming Cost Recovery Surcharges

Ocean carriers of containers in the trans-Pacific trade lanes have recently evaluated the differential between their cost of bunker fuel and the price they charge shippers in the form of a bunker adjustment factor surcharge. The difference added up to \$5 billion not recovered by carriers. As a result of record high oil prices, bunker fuel prices have increased this year from \$295 to \$500 per ton. Members of the Trans-Pacific Stabilization Agreement (TSA), a discussion group made up of 14 ocean container shipping lines operating in the Asia to United States trade lanes, have agreed to the following cost recovery guidelines, which will take effect immediately:

- All new service contracts for the 2008 contract season will be subject to a floating bunker surcharge in accordance with TSA's bunker formula rather than a fixed surcharge.
- Where the volumes of containers to be moved have been met under contract conditions, carriers will seek an immediate adjustment to bring bunker recovery to a floating basis for any additional volumes. Some carriers may seek to accomplish this through application of a separate extraordinary bunker charge.
- Where the volumes of containers to be moved have not been met under contract conditions, carriers now intend to seek mutual agreement with customers to change the fuel surcharge to a new floating basis.

There is a concern among agricultural shippers that this new policy, under the cover of confidential service contracts, will apply more so to export customers than retail importers that move larger volumes and therefore have more bargaining leverage. The TSA has published bunker adjustment factor surcharges for December which increased 13 percent over November (See table below). April.Taylor@usda.gov

Bunker Adjustment Factors for a 20-foot container					
	November	December	Cost per metric ton*	% change	\$ change
Westbound	544	616	31	13%	72
Eastbound	545	615	31	13%	70

*20 metric tons per container

Grain Transportation Indicators

Table 1
Grain Transport Cost Indicators¹

Week ending	Truck	Rail ²	Barge	Ocean	
				Gulf	Pacific
11/21/07	229	26	226	528	638
11/14/07	230	33	243	514	652

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

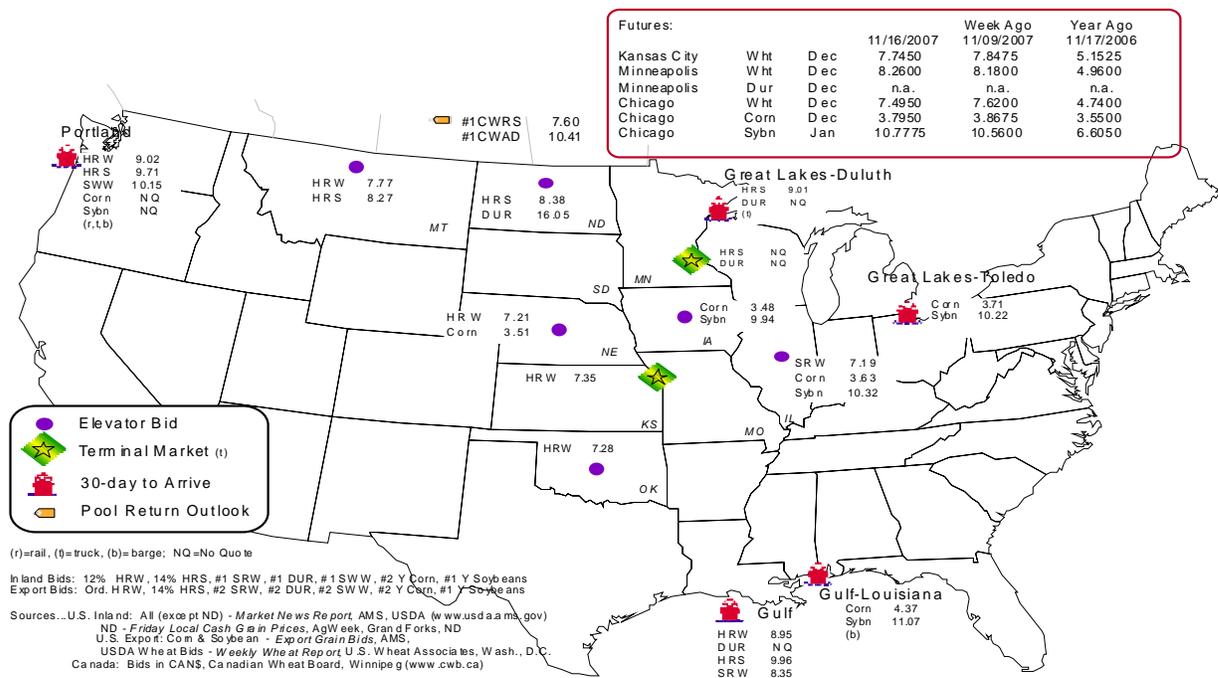
Table 2
Market Update: U.S. Origins to Export Position Price Spreads (\$/bushel)

Commodity	Origin-Destination	11/16/2007	11/9/2007
Corn	IL--Gulf	-0.74	-0.74
Corn	NE--Gulf	-0.86	-0.86
Soybean	IA--Gulf	-1.13	-1.15
HRW	KS--Gulf	-1.60	-1.60
HRS	ND--Portland	-1.33	-1.44

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 ²	Texas Gulf	Mexico	Northwest	East Gulf	
11/14/2007 ^p	1,515	3,457	879	5,084	1,425	12,360
11/07/2007 ^f	1,563	3,590	927	5,945	1,033	13,058
2007 YTD	52,528	99,861	38,169	196,356	24,773	411,687
2006 YTD	84,635	88,295	41,221	188,024	25,651	427,826
2007 YTD as % of 2006 YTD	62	113	93	104	97	96
Last 4 weeks as % of 2006 ³	70	223	109	132	104	127
Last 4 weeks as % of 4-year avg. ³	94	204	76	127	135	129
Total 2006	96,593	99,866	45,971	213,682	29,334	485,446
Total 2005	50,677	99,864	60,879	223,328	15,752	450,500

¹Data is incomplete as it is voluntarily provided; ²Mississippi Gulf data back to January, 2004 from several new sources has been added resulting in large increases in the numbers reported; ³Compared with same 4-weeks in 2006 and prior 4-year average.

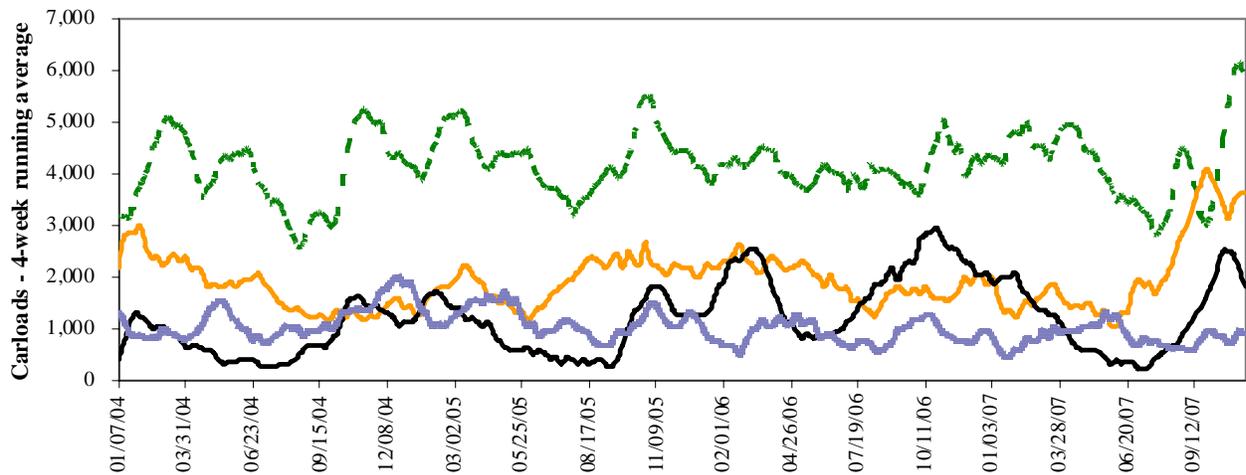
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Program/s/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: 4 Wks. ending 11/14 -- up 32 % from same period last year; up 27 % from 4-year average
— Texas Gulf: 11/14 -- up 123 % from same period last year; up 104 % from 4-year average
— Miss. River: 11/14 -- down 30 % from same period last year; down 6 % from 3-year average
— Cross-border Mexico: 11/14 -- up 9 % from same period last year; down 24 % from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

Table 4

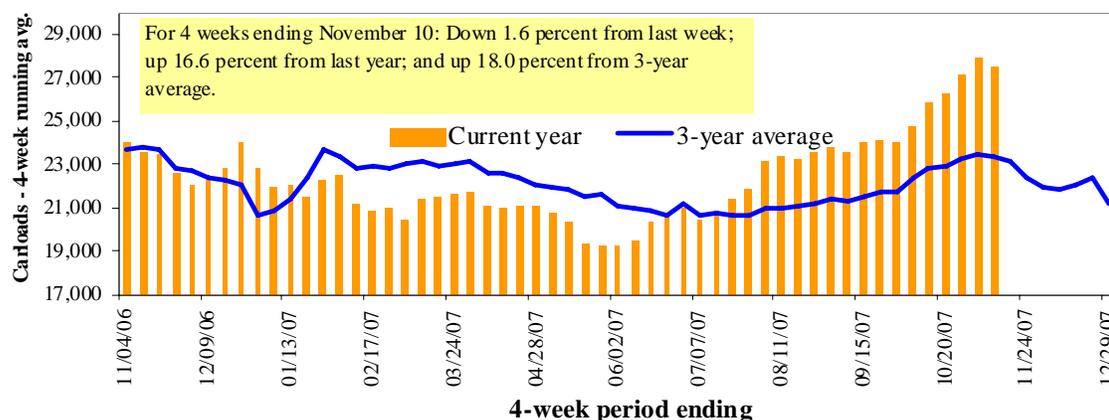
Class I Rail Carrier Grain Car Bulletin (grain carloads originated)

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
11/10/07	3,877	3,740	12,222	737	6,348	26,924	5,267	5,463
This week last year	3,770	3,552	10,376	625	5,335	23,658	5,492	5,993
2007 YTD	126,293	144,925	457,955	29,396	251,578	1,010,147	216,868	207,387
2006 YTD	141,879	146,339	444,902	25,381	263,258	1,021,759	223,123	204,012
2007 YTD as % of 2006 YTD	89	99	103	116	96	99	97	102
Last 4 weeks as % of 2006 ¹	99	112	121	125	122	117	99	88
Last 4 weeks as % of 3-yr avg. ¹	107	110	124	132	117	118	107	102
Total 2006	164,056	168,819	515,102	28,629	301,197	1,177,803	258,932	238,765

¹As a percent of the same period in 2005 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							
	Dec-07	Dec-06	Jan-08	Jan-07	Feb-08	Feb-07	Mar-08	Mar-07
11/17/2007								
BNSF ³								
COT grain units	no offer	n/a	no offer	no bid	no bids	no bid	no offer	no bids
COT grain single-car ⁵	no offer	n/a	no offer	0..1	\$0	0..3	\$0	no offer
UP ⁴								
GCAS/Region 1	no bids	n/a	no bids	no bid	no offer	no offer	no offer	no offer
GCAS/Region 2	no offer	n/a	no bids	no bid	no offer	no offer	no offer	no offer

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.

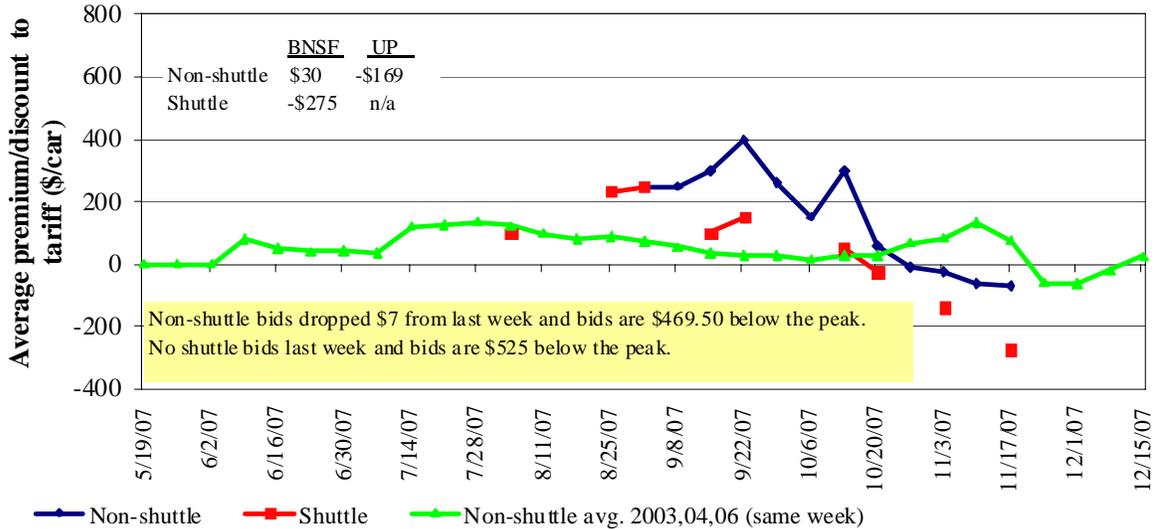
Source: Transportation & Marketing Program/AMS/USDA.

Rail service may be ordered directly from the railroad via **auction** for guaranteed service, or via tariff for nonguaranteed service, or through the secondary railcar market.

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

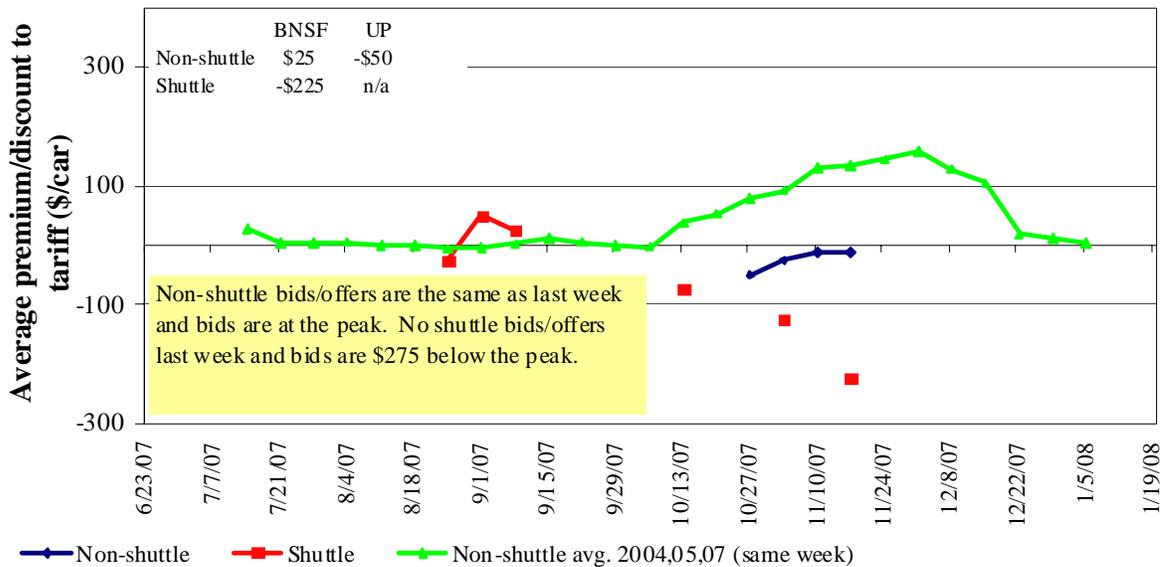
Bids/Offers for Railcars to be Delivered in December 2007, Secondary Market



Excluded 2005 from the 3-year non-shuttle average due to abnormally high rates following Hurricanes Katrina and Rita.
Non-shuttle bids include unit-train and single-car bids. n/a = not available.
Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

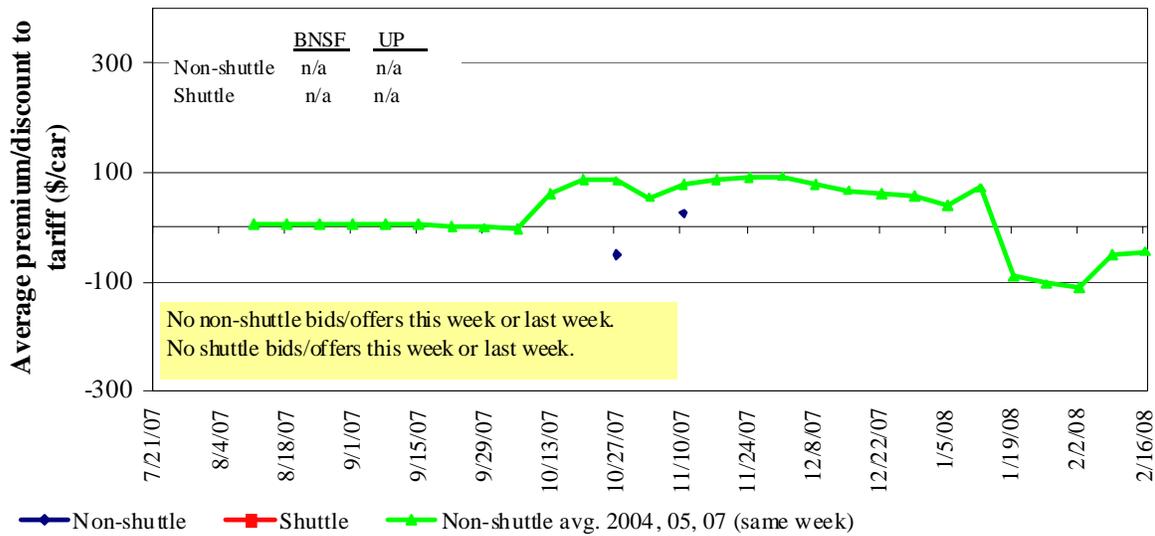
Bids/Offers for Railcars to be Delivered in January 2008, Secondary Market



Excluded 2006 from the 3-year non-shuttle average due to abnormally high rates following Hurricanes Katrina and Rita.
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 February 2008, Secondary Market



Excluded 2006 from the 3-year non-shuttle average due to abnormally high rates following Hurricanes Katrina and Rita.
 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					
	Dec-07	Jan-08	Feb-08	Mar-08	Apr-08	May-08
Non-shuttle						
BNSF-GF	30	25	n/a	-25	n/a	n/a
Change from last week	5	0	n/a	-25	n/a	n/a
Change from same week 2006	116	67	n/a	n/a	n/a	n/a
UP-Pool	-169	-50	n/a	n/a	n/a	n/a
Change from last week	-19	0	n/a	n/a	n/a	n/a
Change from same week 2006	12	75	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	-275	-225	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 2006	-104	-25	n/a	n/a	n/a	n/a
UP-Pool	n/a	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 2006	n/a	n/a	n/a	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:				As % of same	Rate per	Rate per
11/5/2007	Origin region	Destination region	Rate/car	month last year	metric ton	bushel ²
<u>Unit train¹</u>						
Wheat	Chicago, IL	Albany, NY	\$2,322	107	\$25.60	\$0.70
	Kansas City, MO	Galveston, TX	\$2,273	107	\$25.06	\$0.68
	South Central, KS	Galveston, TX	\$2,820	106	\$31.08	\$0.85
	Minneapolis, MN	Houston, TX	\$3,214	106	\$35.43	\$0.96
	St. Louis, MO	Houston, TX	\$2,730	107	\$30.09	\$0.82
	South Central, ND	Houston, TX	\$4,649	102	\$51.25	\$1.39
	Minneapolis, MN	Portland, OR	\$3,840	100	\$42.33	\$1.15
	South Central, ND	Portland, OR	\$3,840	100	\$42.33	\$1.15
	Northwest, KS	Portland, OR	\$4,590	100	\$50.60	\$1.38
	Chicago, IL	Richmond, VA	\$2,353	99	\$25.94	\$0.71
Corn	Chicago, IL	Baton Rouge, LA	\$3,260	116	\$35.93	\$0.91
	Council Bluffs, IA	Baton Rouge, LA	\$3,107	116	\$34.25	\$0.87
	Kansas City, MO	Dalhart, TX	\$3,204	110	\$35.32	\$0.90
	Minneapolis, MN	Portland, OR	\$3,350	103	\$36.93	\$0.94
	Evansville, IN	Raleigh, NC	\$2,708	121	\$29.85	\$0.76
	Columbus, OH	Raleigh, NC	\$2,597	123	\$28.63	\$0.73
	Council Bluffs, IA	Stockton, CA	\$5,280	104	\$58.20	\$1.48
Soybeans	Chicago, IL	Baton Rouge, LA	\$3,309	116	\$36.47	\$0.99
	Council Bluffs, IA	Baton Rouge, LA	\$3,156	116	\$34.79	\$0.95
	Minneapolis, MN	Portland, OR	\$3,960	100	\$43.65	\$1.19
	Evansville, IN	Raleigh, NC	\$2,708	121	\$29.85	\$0.81
	Chicago, IL	Raleigh, NC	\$3,308	117	\$36.46	\$0.99
<u>Shuttle Train</u>						
Wheat	St. Louis, MO	Houston, TX	\$2,212	115	\$24.38	\$0.66
	Minneapolis, MN	Portland, OR	\$3,540	100	\$39.02	\$1.06
Corn	Fremont, NE	Houston, TX	\$2,448	108	\$26.98	\$0.69
	Minneapolis, MN	Portland, OR	\$3,348	106	\$36.90	\$0.94
Soybeans	Council Bluffs, IA	Houston, TX	\$2,612	108	\$28.79	\$0.78
	Minneapolis, MN	Portland, OR	\$3,503	106	\$38.61	\$1.05

¹A unit train refers to shipments of at least 52 cars. Shuttle train rates are available for qualified shipments of

75-110 cars that meet railroad efficiency requirements.

²Approximate load per car = 100 short tons (90.72 metric tons): corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

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

Table 8

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

Commodity	Origin state	Border crossing region	Train size ¹	Tariff rate ²	As % of		
					same month last year	Rate per metric ton	Rate per bushel ³
Wheat	KS	Brownsville, TX	Shuttle	\$3,364	114	\$34.37	\$0.93
	ND	Eagle Pass, TX	Unit	\$4,791	107	\$48.95	\$1.33
	OK	El Paso, TX	Shuttle	\$2,327	104	\$23.78	\$0.65
	OK	El Paso, TX	Unit	\$2,904	114	\$29.67	\$0.81
	AR	Laredo, TX	Unit	\$2,729	105	\$27.88	\$0.76
	IL	Laredo, TX	Unit	\$3,855	113	\$39.39	\$1.07
	MT	Laredo, TX	Shuttle	\$3,980	100	\$40.67	\$1.11
	TX	Laredo, TX	Shuttle	\$2,610	115	\$26.67	\$0.73
	MO	Laredo, TX	Shuttle	\$3,232	114	\$33.02	\$0.90
	WI	Laredo, TX	Unit	\$4,094	113	\$41.83	\$1.14
Corn	NE	Brownsville, TX	Shuttle	\$4,318	115	\$44.12	\$1.12
	NE	Brownsville, TX	Unit	\$4,217 ⁴	105	\$43.09	\$1.09
	IA	Eagle Pass, TX	Unit	\$4,570	115	\$46.69	\$1.18
	MO	Eagle Pass, TX	Shuttle	\$4,066 ⁴	106	\$41.54	\$1.05
	NE	Eagle Pass, TX	Shuttle	\$4,466 ⁴	110	\$45.63	\$1.16
	IA	Laredo, TX	Shuttle	\$4,486	115	\$45.84	\$1.16
	Soybean	IA	Brownsville, TX	Shuttle	\$4,167	118	\$42.58
MN		Brownsville, TX	Shuttle	\$4,365	117	\$44.60	\$1.21
NE		Brownsville, TX	Shuttle	\$3,958	118	\$40.44	\$1.10
NE		Eagle Pass, TX	Shuttle	\$4,041	118	\$41.29	\$1.12
IA		Laredo, TX	Unit	\$4,209	118	\$43.01	\$1.17

¹A unit train refers to shipments of at least 52 cars. Shuttle train are available for qualified shipments of 75-110 cars that meet railroad efficiency requirements.

²Rates are based upon published tariff rates for high-capacity rail cars.

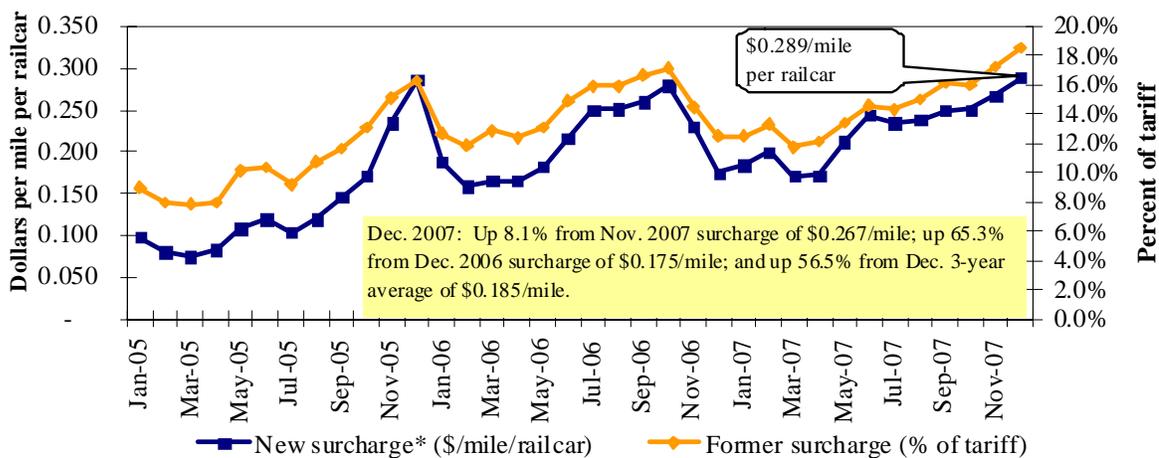
³Approximate load per car = 97.87 metric tons: Corn 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

⁴High-capacity rate not available, rate estimated using published low-capacity tariff rate x 1.08

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

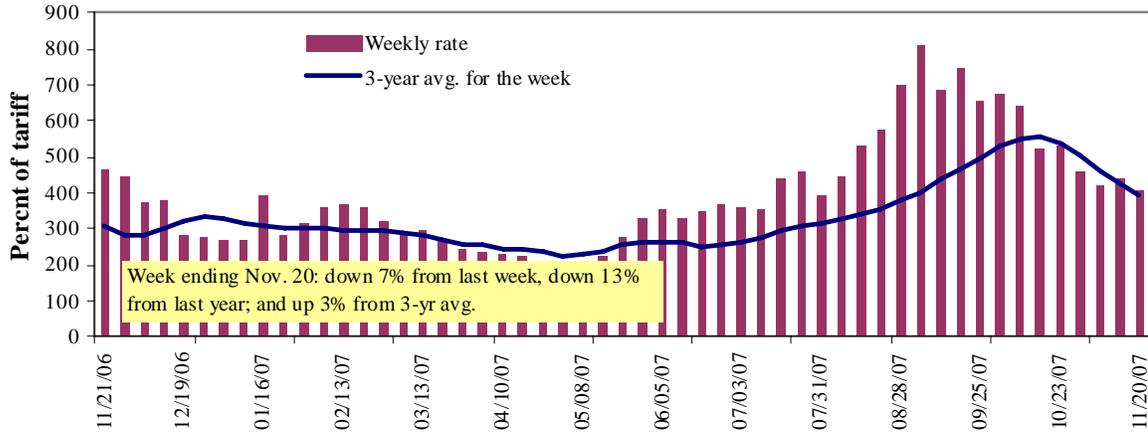
* Mileage-based fuel surcharges from December 2004 through March 2007 are estimated.

Sources: www.bnsf.com, www.cn.ca, www8.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	Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	11/20/2007	453	413	406	324	369	369	297
	11/13/2007	480	436	438	358	424	415	327
\$/ton	11/20/2007	28.06	21.97	18.84	12.93	17.31	14.91	9.33
	11/13/2007	29.71	23.20	20.32	14.28	19.89	16.77	10.27
Current week % change from the same week:								
	Last year	-	-12	-13	-15	-2	-2	7
	3-year avg. ²	2	3	3	-4	4	4	5
Rate¹	December	-	-	424	333	369	369	305
	February	-	-	415	341	369	369	309

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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

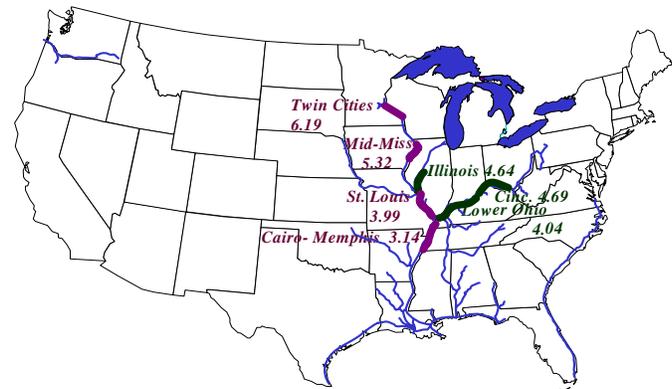
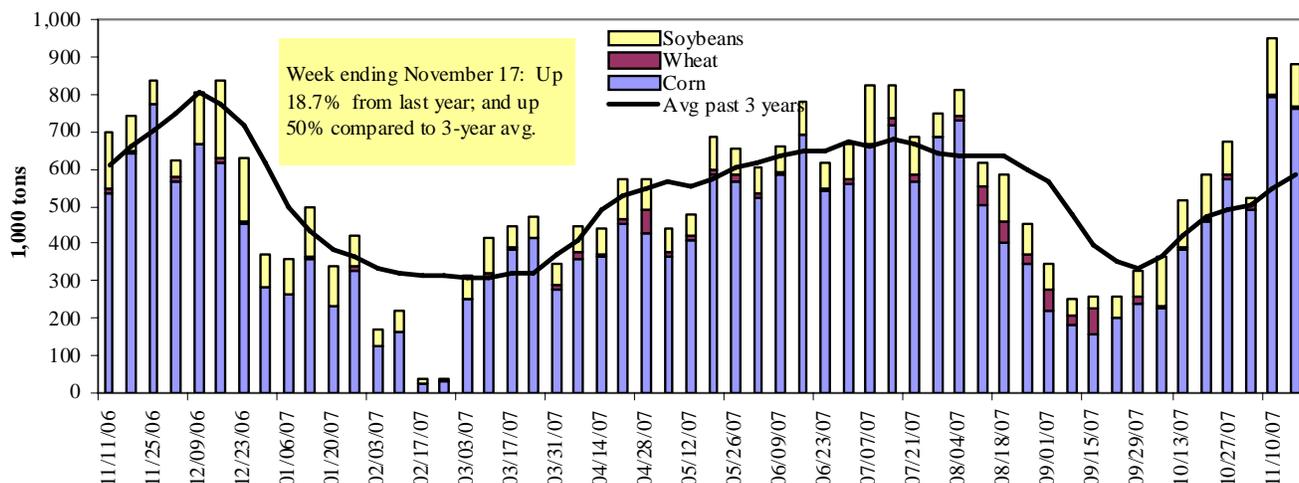


Figure 10
Barge Movements on the Mississippi River¹ (Locks 27 - Granite City, IL)



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/webprpts/default.asp)

Table 10

Barge Grain Movements (1,000 tons)

Week ending 11/17/2007	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	332	9	75	0	416
Winfield, MO (L25)	398	0	95	0	493
Alton, IL (L26)	770	6	117	0	894
Granite City, IL (L27)	762	6	115	0	883
Illinois River (L8)	313	3	6	0	323
Ohio River (L52)	123	6	32	0	162
Arkansas River (L1)	0	7	22	2	31
Weekly total - 2007	885	19	170	2	1,076
Weekly total - 2006	708	9	183	13	913
2007 YTD ¹	22,091	1,593	5,403	501	29,588
2006 YTD	23,591	1,342	6,398	618	31,950
2007 as % of 2006 YTD	94	119	84	81	93
Last 4 weeks as % of 2006 ²	135	174	62	90	115
Total 2006	27,439	1,442	7,733	719	37,332

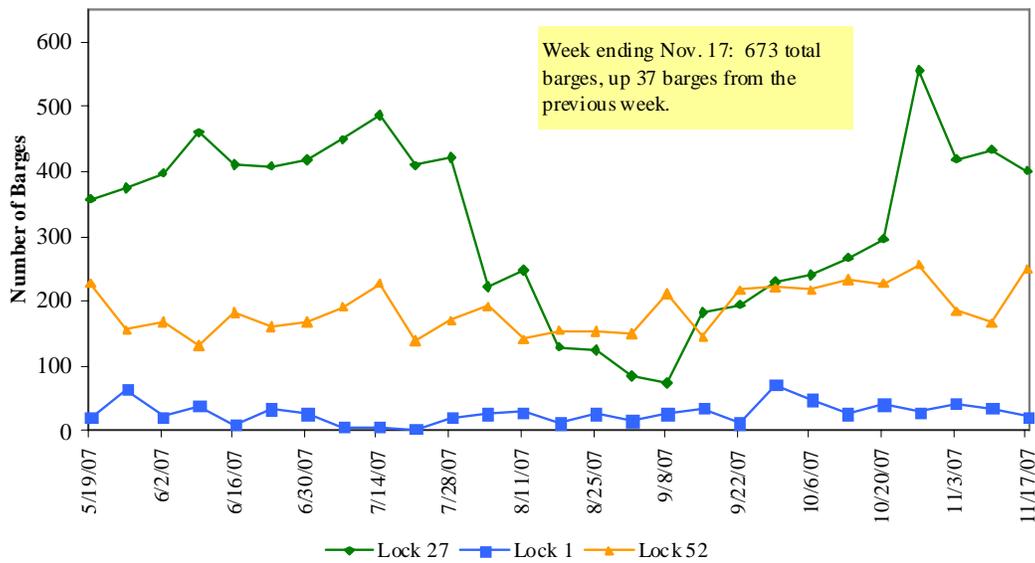
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2006.

Note: Total may not add exactly, due to rounding

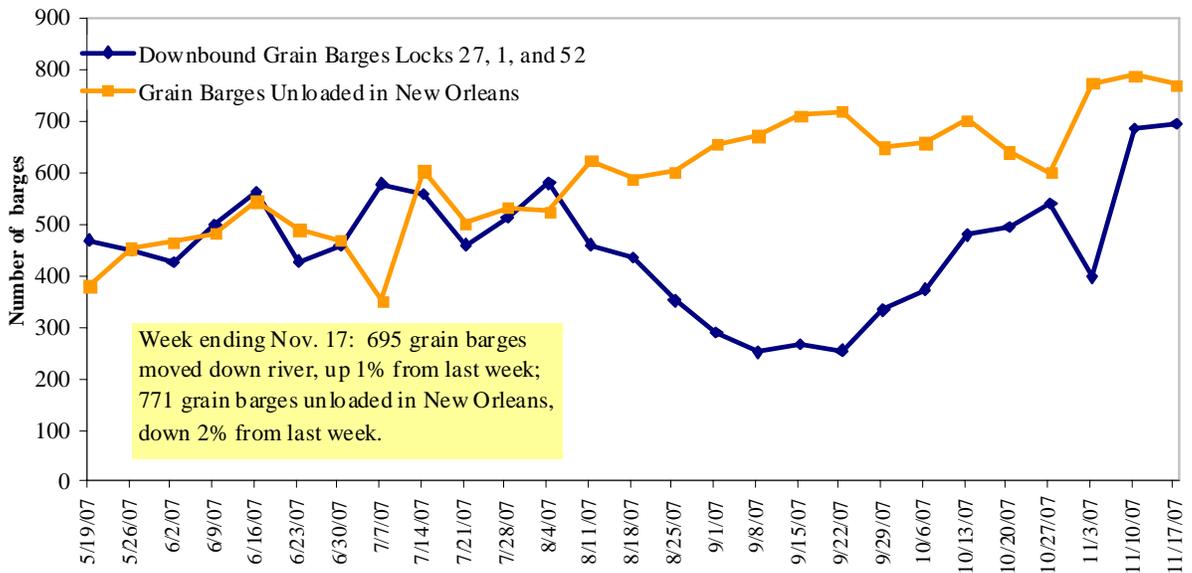
Source: U.S. Army Corps of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webprpts/default.asp)

Figure 11
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



Source: Army Corps of Engineers

Figure 12
Grain Barges for Export in New Orleans Region



Source: Army Corps of Engineers and GIPSA

Note: Due to data restructuring of grain barges unloaded in New Orleans, the week ending May 19 represents 6 days of data.

Truck Transportation

The **weekly diesel price** provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant expense for truck grain movements, accounting for 37 percent of the estimated variable cost.

Table 11

Retail on-Highway Diesel Prices¹, Week Ending 11/19/07 (US\$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.407	-0.008	0.886
	New England	3.488	0.004	0.863
	Central Atlantic	3.524	0.001	0.886
	Lower Atlantic	3.350	-0.012	0.889
II	Mid west ²	3.389	-0.014	0.835
III	Gulf Coast ³	3.324	-0.023	0.855
IV	Rocky Mountain	3.507	-0.025	0.860
V	West Coast	3.586	-0.022	0.862
	California	3.624	-0.039	0.934
Total	U.S.	3.410	-0.015	0.857

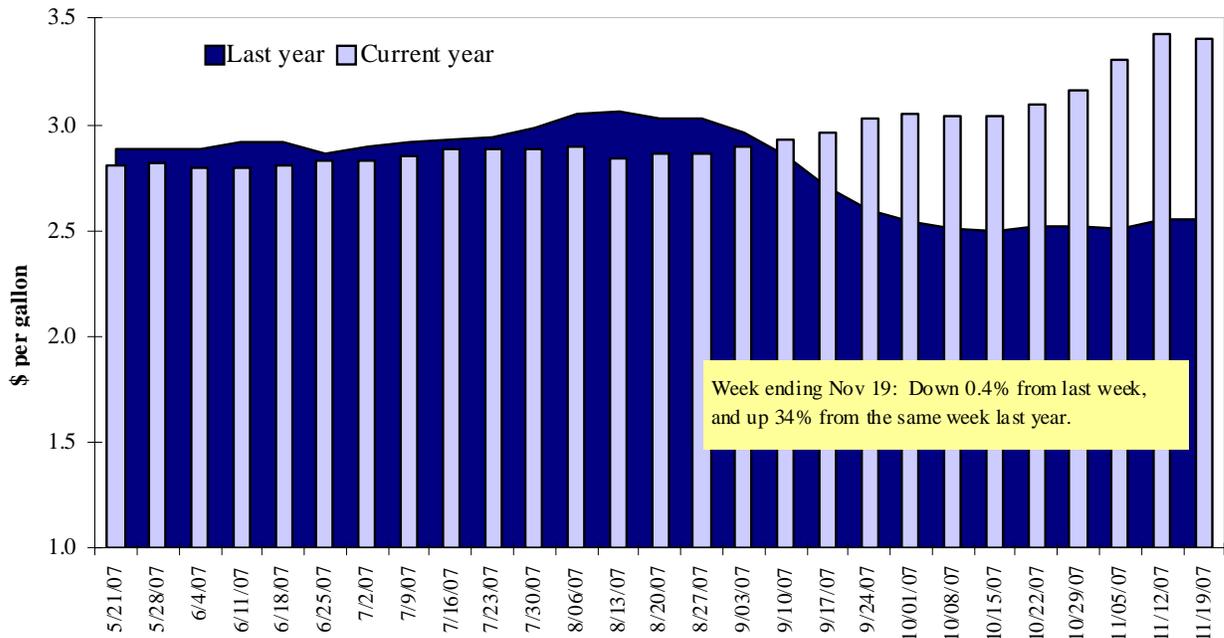
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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 ¹	Wheat					All wheat	Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR				
Export Balances									
11/8/2007	4,718	994	2,660	1,391	362	10,126	18,642	8,440	37,208
This week year ago	1,593	466	1,078	1,083	107	4,327	11,944	7,080	23,351
Cumulative exports-marketing year²									
2007/08 YTD	6,851	3,706	3,709	2,075	544	16,886	12,044	6,008	34,938
2006/07 YTD	2,473	1,665	2,966	2,099	417	9,620	11,166	7,624	28,410
YTD 2007/08 as % of 2006/07	277	223	125	99	130	176	108	79	123
Last 4 wks as % of same period 2006/07	319	218	266	136	338	250	158	115	162
2006/07 Total	6,800	3,866	6,480	4,996	761	22,902	53,799	30,261	106,962
2005/06 Total	10,459	2,037	7,244	4,159	930	24,828	54,354	25,570	104,752

¹ Current unshipped export sales to date

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

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 11/08/07	Total Commitments ²		% change current MY from last MY	Exports ³ 2006/07
	2007/08	2006/07		
	Current MY	Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan ⁴	7,722	7,078	9	15,640
Mexico	5,158	4,329	19	9,114
Taiwan	1,550	2,006	(23)	4,517
Korea ⁵	3,105	1,520	104	4,079
Egypt ⁶	1,678	968	73	3,508
Top 5 importers	19,213	15,902	21	36,858
Total US corn export sales	30,686	23,110	33	
Change from Last Week	1,364	1,396		
Top 5 importers' share of U.S. corn export sales	63%	69%		
USDA forecast, November 2007	59,690	53,850	11	
Corn Use for Ethanol USDA forecast, November 2007	81,280	53,720	51	

(n) indicates negative number.

¹ Based on FAS 2006/07 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 11/14 : 106,680 mt to Japan for 2007/08.

⁵ Not included - FAS Press Release 11/20: 374,000 mt to S. Korea for 2007/08.

⁶ Not included - FAS Press Release 11/14: 180,000 mt to Egypt for 2007/08.

Table 14

Top 5 Importers¹ of U.S. Soybeans

Week ending 11/08/07	Total Commitments ²		% change current MY from last MY	Exports ³ 2006/07
	2007/08 Current MY	2006/07 Last MY		
	- 1,000 mt -			- 1,000 mt -
China ⁴	7,060	6,212	14	11,455
Mexico	1,368	1,262	8	3,854
Japan	1,393	1,279	9	3,159
EU-25	940	1,272	(26)	3,551
Taiwan	564	805	(30)	1,942
Top 5 importers	11,325	10,830	5	23,960
Total US soybean export sales	14,448	14,704	(2)	
Change from last week	1,296	747		
Top 5 importers' share of U.S. soybean export sales	78%	74%		
USDA forecast, November 2007	26,540	30,345	(13)	

(n) indicates negative number.

¹Based on FAS 2006/07 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.⁴Not included - FAS Press Releases: **886,000 mt to China** (115,000 mt on 11/09; and 107,000 mt on 11/13; 110,000 mt on 11/15; 226,000 mt on 11/16; 221,000 mt on 11/19, and 107,000 mt on 11/20) for 2007/08.

Table 15

Top 10 Importers¹ of All U.S. Wheat

Week ending 11/08/07	Total Commitments ²		% change current MY from last MY	Exports ³ 2006/07
	2007/08 Current MY	2006/07 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	1,845	1,785	3	3,533
Nigeria	1,233	1,169	5	2,594
Mexico	1,840	1,314	40	2,220
Egypt	2,608	1,160	125	2,092
Philippines	1,533	1,307	17	1,739
Korea, South	1,008	720	40	1,195
Taiwan	726	487	49	1,001
Iraq	1,907	700	172	799
Yemen	866	461	88	709
Algeria	1,222	123	891	160
Top 10 importers	12,942	7,442	74	16,041
Total US wheat export sales	27,012	13,948	94	23,789
Change from last week	416	323		
Top 10 importers' share of U.S. wheat export sales	48%	53%		
USDA forecast, November 2007	31,300	24,740	27	

(n) indicates negative number.

¹Based on FAS 2006/07 Marketing Year Ranking Reports (except Algeria) - 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 11/15/07	2007 YTD ¹	2006 YTD ¹	2007 YTD as % of 2006 YTD	Last 4-weeks as % of		Total ¹ 2006
					2006	3-yr. avg.	
Pacific Northwest							
Wheat	218	10,554	9,608	110	186	118	11,083
Corn	216	7,847	8,625	91	135	141	9,556
Soybeans	159	6,314	5,262	120	96	84	6,049
Total	594	24,716	23,494	105	132	110	26,688
Mississippi Gulf							
Wheat	127	5,907	3,776	156	123	131	4,124
Corn	850	30,410	31,903	95	114	121	35,462
Soybeans	408	11,826	13,220	89	66	62	16,222
Total	1,385	48,143	48,898	98	94	95	55,808
Texas Gulf							
Wheat	171	7,636	4,581	167	368	226	5,078
Corn	0	1,093	2,469	44	44	99	3,055
Soybeans	0	76	124	61	0	0	153
Total	171	8,804	7,173	123	162	182	8,286
Great Lakes							
Wheat	108	2,357	1,250	189	459	229	1,382
Corn	29	682	1,525	45	142	86	1,701
Soybeans	0	382	840	45	29	37	1,113
Total	137	3,421	3,615	95	95	89	4,196
Atlantic							
Wheat	18	1,164	616	189	282	592	686
Corn	0	488	647	75	64	119	736
Soybeans	25	354	421	84	53	31	621
Total	44	2,005	1,684	119	94	93	2,043
U.S. total from ports²							
Wheat	643	25,260	18,581	136	223	159	22,354
Corn	1,096	40,521	45,169	90	111	121	50,509
Soybeans	592	18,951	19,866	95	67	64	24,157
Total	2,331	84,732	83,616	101	108	104	97,020

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

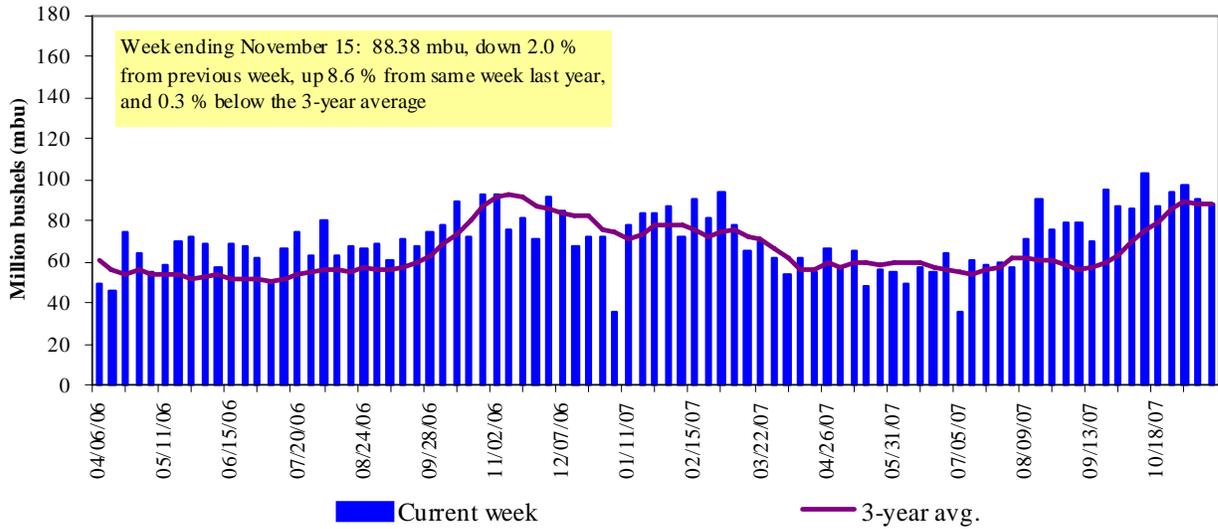
² Total includes only port regions shown above

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, it 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 57 percent of these U.S. export grain shipments departed through the Mississippi Gulf region in 2006.

Figure 14

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

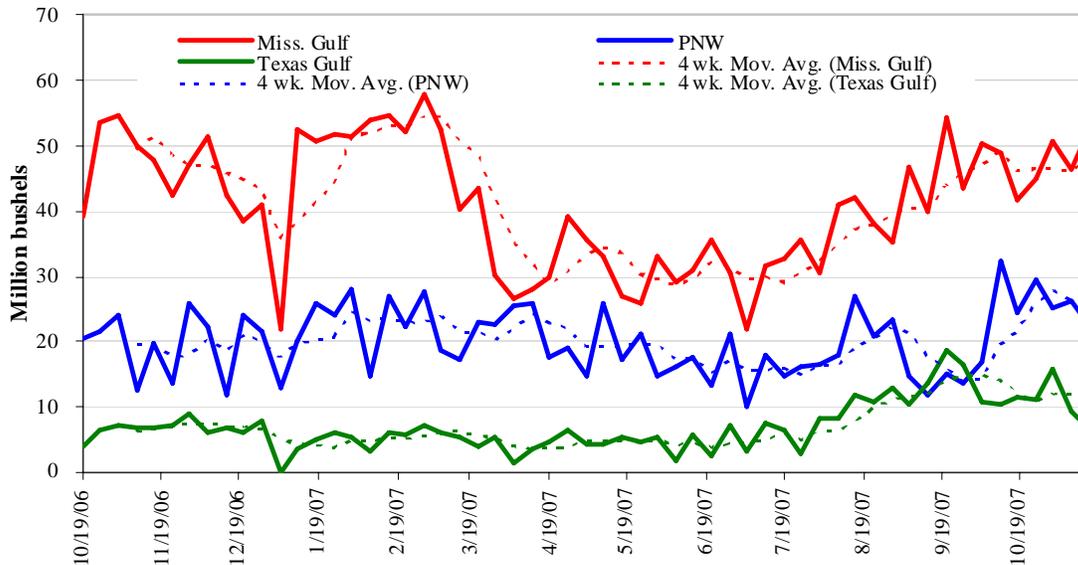


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

<u>Nov 15: % change from:</u>	<u>MS Gulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Last week	up 14	down 33	up 6	down 2
Last year (same week)	up 11	down 6	up 9	up 9
3-yr avg (4-wk mov. avg.)	up 4	up 7	up 4	down 0.3

Ocean Transportation

Table 17

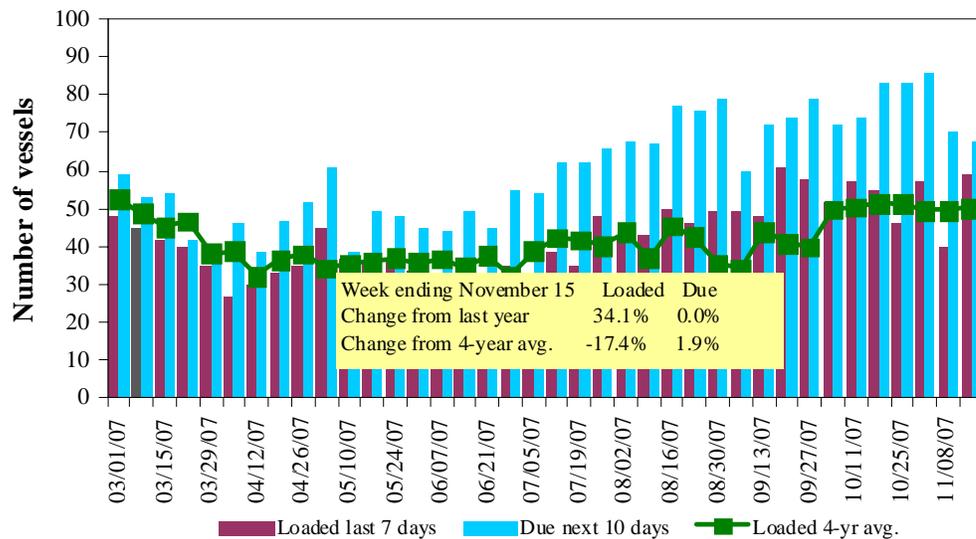
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded	Due next	In port	In port
		7-days	10-days		
11/15/2007	44	59	68	11	10
11/8/2007	51	40	70	7	8
2006 range	(16..40)	(31..56)	(45..81)	(1..17)	(2..13)
2006 avg.	27	42	58	8	7

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

U.S. Gulf¹ Vessel Loading Activity

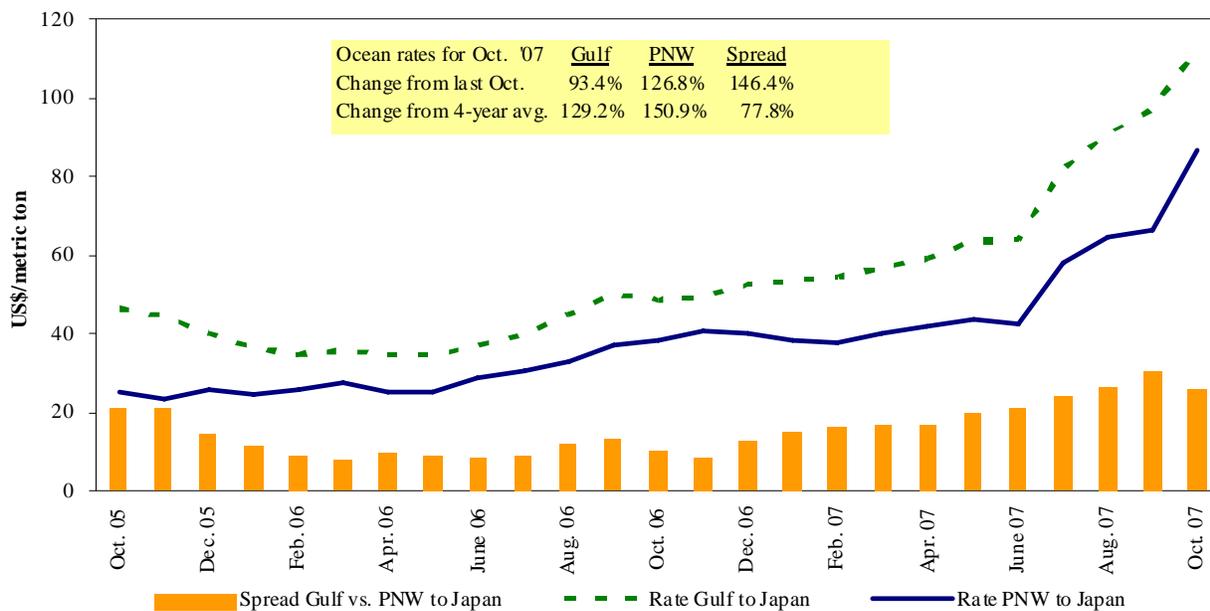


Source: Transportation & Marketing Programs/AMS/USDA

¹U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: Baltic Exchange (www.balticexchange.com)/ Drewry Shipping Consultants Ltd (www.drewry.co.uk)

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 11/17/2007

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Algeria	Wheat	Oct 20/ Nov 5	30,000	90.50
U.S. Gulf	Algeria	Corn	Oct 20/30	40,000	80.00
U.S. Gulf	China	Grains	Nov 5/10	55,000	115.00
U.S. Gulf	Peru	Wheat	Oct 25/Nov 5	11,500	145.29
U.S. Gulf	Nicaragua	Wheat	Nov 20/30	15,000	144.87
U.S. Gulf	Algeria	Miaze/Soybean MI	Nov 14/21	16,000	130.00
U.S. Gulf	Morocco	Hvy Grain	Oct 5/10	25,000	85.00
U.S. Gulf	Djibouti ¹	Wheat	Nov 26/Dec 6	9,080	165.83
River Plate	Algeria	Hvy Grain	Oct 18/25	30,000	56.50
River Plate	Turkey	Soybean Meal	Oct 1/15	18,000	98.00
River Plate	United Kingdom	Grain	Oct 10/20	37,500	94.50

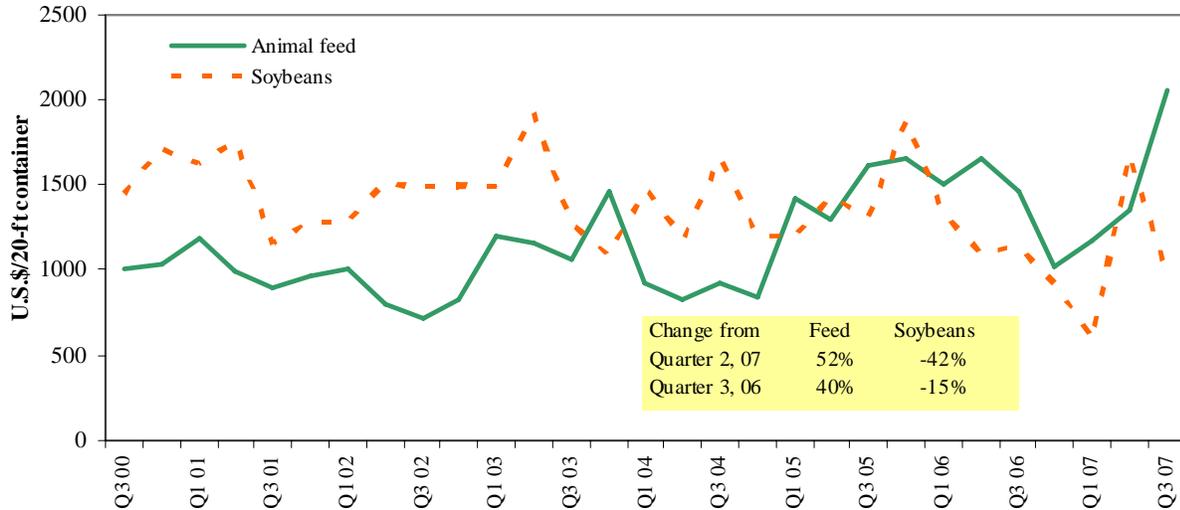
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

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)

Figure 18

Ocean Rates¹ for Containerized Shipments to Selected Asian Countries



¹Rates are weighted by shipping line market share and destination country. Rates provided are publicly filed tariff rates, not those negotiated in a confidential service contract.

Countries include: Animal Feed: Bangkok-Thailand (1%), Busan-Korea (30%), Hong Kong (17%), Kaohsiung/Keelung-Taiwan (32%), Tokyo-Japan (20%). Soybeans: Kaohsiung/Keelung-Taiwan (98%), Tokyo-Japan (2%)

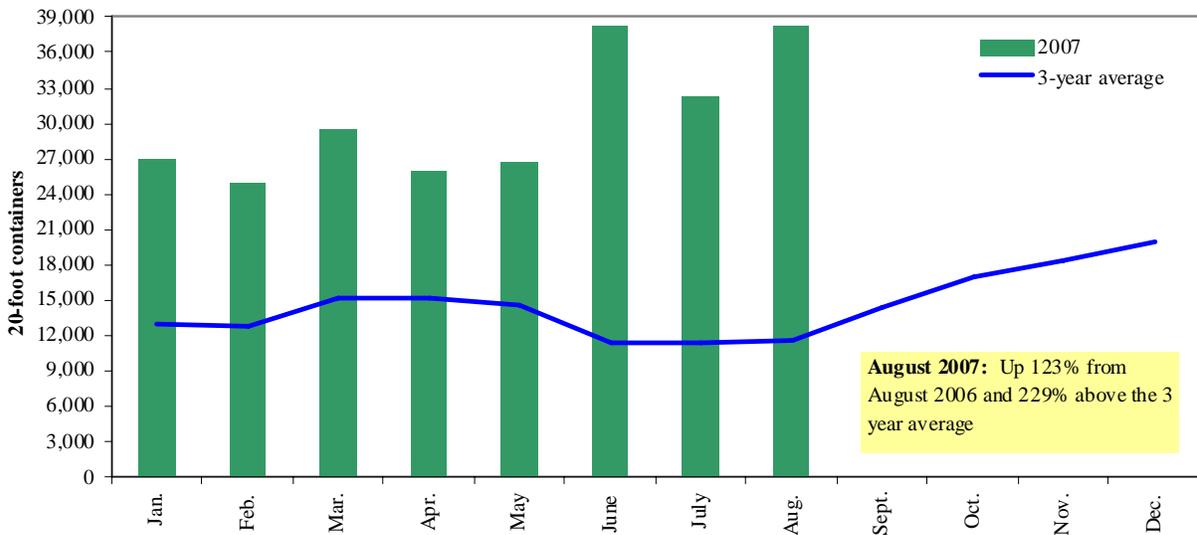
Source: Ocean Rate Bulletin, Quarter 3, 2007, Transportation & Marketing Programs/AMS/USDA

Container ocean freight rates – average rate per twenty-foot equivalent unit (TEU) weighted by shipping line market share and trade route.

During 2006, containers were used to transport 3 percent of total U.S. grain exported, and 5 percent of total U.S. grain exported to Asia.

Figure 19

Monthly Shipments of Containerized Grain to Asia



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

Specialists

Contact Information

Coordinators		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 690-1328
Ethel Mitchell	ethel.mitchell@usda.gov	(202) 720-1378
Weekly Highlight Editor		
Marina Denicoff	marina.denicoff@usda.gov	(202) 720-8264
Grain Transportation Indicators		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 690-1328
Rail		
Marvin Prater	marvin.prater@usda.gov	(202) 690-6290
Johnny Hill	johnny.hill@usda.gov	(202) 720-4211
Barge Transportation		
Nicholas Marathon	nick.marathon@usda.gov	(202) 690-0331
Ethel Mitchell	ethel.mitchell@usda.gov	(202) 720-1378
April Taylor	april.taylor@usda.gov	(202) 690-1326
Truck Transportation		
April Taylor	april.taylor@usda.gov	(202)690-1326
Grain Exports		
Johnny Hill	johnny.hill@usda.gov	(202) 720-4211
Marina Denicoff	marina.denicoff@usda.gov	(202) 720-8264
Ocean Transportation		
Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@usda.gov	(202) 690-1328
April Taylor (Container rates)	april.taylor@usda.gov	(202) 690-1326

Subscription Information: Send relevant information to GTRContactUs@USDA.gov for an electronic copy (*printed copies are also available upon request*).

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