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

WEEKLY HIGHLIGHTS

River System Back to 24-hour Operation, Draft at Mouth of Mississippi River Increased to 45 Feet

For over two months, barges on the Mississippi River have been limited to daylight transit at St. Louis, MO, by high water. These restrictions were lifted on July 20 when the St. Louis gage level dropped below 25 feet. The lower Mississippi River continues to report improving navigation conditions for inland and ocean-going vessels. On July 16, the Mississippi River Bar Pilots increased the operating draft for ocean vessels from 43 to 45 feet near the mouth of the Mississippi River. Bar Pilots take command of all vessels entering or exiting the mouth of the Mississippi River. The increase in draft allows ocean-going vessels to load to full cargo capacity.

Grain Inspections Lowest Since June 2010

For the week ending July 14, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 1.20 million metric tons (mmt), down 15 percent from the previous week and 34 percent below this time last year. Inspections were the lowest since June 17, 2010 (1.16 mmt). The drop in inspections is due mainly to decreased shipments of corn and soybeans, which were down 18 and 30 percent from the previous week. Grain inspections also dropped in the Mississippi Gulf and Pacific Northwest. Texas Gulf inspections, however, increased 67 percent from the past week due to a boost in wheat inspections (0.225 mmt) being shipped to Nigeria, Iraq, and Mexico. **Outstanding export sales** of wheat are down slightly from the past week but up 25 percent from last year.

Gulf Grain Vessel Loading Activity Expected to Increase

There are indications that grain loading activity in the U.S. Gulf may increase in the next few weeks; movements of grain barges down the Mississippi River are increasing, unshipped export balances remain high, and an increased number of vessels expected to be loaded during the next 10 days. During the week ending July 16, **barge grain movements** totaled 723,265 tons, 11 percent higher than the previous week. During the week ending July 14, **unshipped export balances** of wheat and soybeans are 25 and 18 percent greater than the same period last year. In addition, 51 **ocean-going grain vessels** are expected to be loaded within the next 10 days, 9 percent more than the same period last year. This is the highest number of grain vessels expected to be loaded in almost 4 months.

Snapshots by Sector

Rail

U.S. railroads originated 18,114 **carloads of grain** during the week ending July 9, down 18 percent from last week, 11 percent from last year, and 11 percent lower than the 3-year average.

During the week ending July 14, average July **non-shuttle secondary railcar bids/offers** were $25 above tariff, up $31.50 from last week. Average shuttle rates were $362.50 below tariff, up $19 from last week.

Barge

During the week ending July 16, 463 grain barges **moved down river**, up 8.7 percent from last week; 495 grain barges were **unloaded in New Orleans**, up 13.8 percent from the previous week.

Ocean

During the week ending July 14, 35 **ocean-going grain vessels** were loaded in the Gulf, down 8 percent from last year. Fifty-one vessels are expected to be loaded within the next 10 days, 9 percent more than the same period last year.

During the week ending July 15, ocean freight rate for shipping bulk grain from the Gulf to Japan was $51.50 per metric ton (mt), down 3 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was $27.50 per mt—5 percent less than the previous week.

Fuel

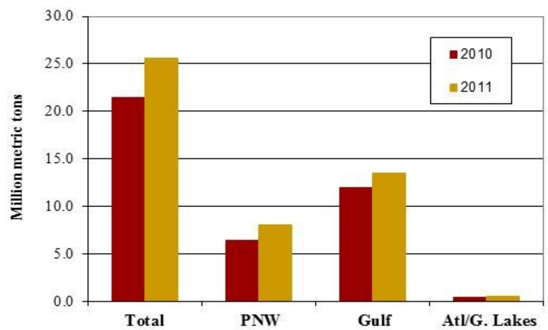
During the week ending July 18, U.S. average **diesel fuel prices** increased 2 cents to $3.92 per gallon—0.6 percent higher than the previous week and 35 percent higher than the same week last year.

Feature Article/Calendar

High Wheat Demand Pushes Second Quarter Inspections to Record Level

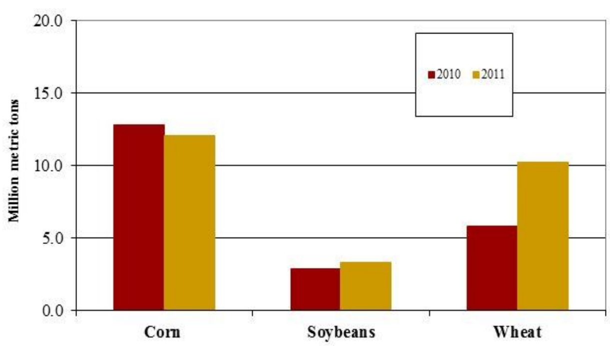
According to the Grain Inspection, Packers and Stockyards Administration (GIPSA), total grain (wheat, corn, and soybeans) inspected for export from all U.S. ports totaled 25.57 million metric tons (mmt) during the second quarter 2011, up 19 percent from last year (see figure 1). This amount is 18 percent above the first quarter and 13 percent above the 5-year average for the second quarter. Wheat inspections reached a record level as demand skyrocketed because of the Russian export ban on grain, which began last year and ended June 30 of this year. The outlook for the next quarter is for increased grain inspections due to strong export demand and the seasonal change in grain shipping patterns.

Figure 1- Second quarter grain inspections by port regions



Grain inspections in each of the major exporting regions were driven up by an increased demand for U.S. wheat in response to the Russian export ban. Pacific Northwest (PNW) grain inspections totaled 7.99 mmt, up 24 percent from last year and 20 percent above the 5-year average due to increased demand from Asia. U.S. Gulf grain inspections reached 13.48 mmt, up 12 percent from last year and 6 percent above the 5-year average because of increased shipments to Asia, South America, and Mexico. Rail deliveries of grain to PNW and Gulf ports were also strong during the second quarter. Gulf deliveries were up 165 percent because more grain was shifted to rail because of high water on the Mississippi River (*see GTR 5/12/11*). Atlantic/Great Lakes inspections (1.07 mmt) increased 125 percent because of increased demand for wheat from Europe, Canada, and Africa.

Figure 2- Second quarter grain inspections by type



Total wheat inspections reached a record 10.22 mmt during the second quarter, up 76 percent from last year and 74 percent above the 5-year average (see figure 2). Second quarter wheat inspections also set a record in the Gulf (4.89 mmt) and PNW (4.26 mmt), increasing 99 and 47 percent, respectively, from last year. The increases were driven by demand from Africa and Asia.

Total second quarter corn inspections (12.06 mmt) decreased 6 percent from last year, due to increasing competition and tight U.S. stocks. Decreased shipments to Asia and Latin America pushed Gulf corn inspections down 14 percent. PNW corn inspections (3.05 mmt), however, increased 8 percent from last year as demand from Asia remained steady. Inspections of corn destined to China during the second quarter jumped 239 percent from last year because of China's increasing demand and decreasing U.S. prices. China has not imported much corn since 1994/95 due to their own adequate production levels.

Total second quarter soybean inspections increased 15 percent from last year to 3.29 mmt as demand from China rebounded. Soybean inspections, however, were 22 percent below the 5-year average. U.S. Gulf second quarter soybean inspections (1.61 mmt) increased 14 percent from last year while the PNW (.679 mmt) decreased 4 percent.

The outlook for the 2011/12 marketing year is for lower wheat exports due to the expected rebound in Russia's exports. Corn exports will rise on increased production and high Chinese demand. Soybean exports will decline (*see GTR, Tables 13-15*) in 2011/12 because of lower U.S. supplies and stronger competition from Brazil. Johnny.Hill@ams.usda.gov

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail[2]	Barge	Ocean	
Week ending				Gulf	Pacific
07/20/11	263	117	239	230	195
07/13/11	262	108	249	237	206

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

[2]The rail indicator is not an index. It is the difference between the nearby secondary rail market bid for this week and the average bid for year 2000 (+) 100.
Source: Transportation & Marketing Programs/AMS/USDA

Table 2

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

Commodity	Origin--Destination	7/15/2011	7/8/2011
Corn	IL--Gulf	-0.72	-0.68
Corn	NE--Gulf	-0.82	-0.83
Soybean	IA--Gulf	-1.16	-1.14
HRW	KS--Gulf	-1.10	-0.86
HRS	ND--Portland	-3.65	-4.08

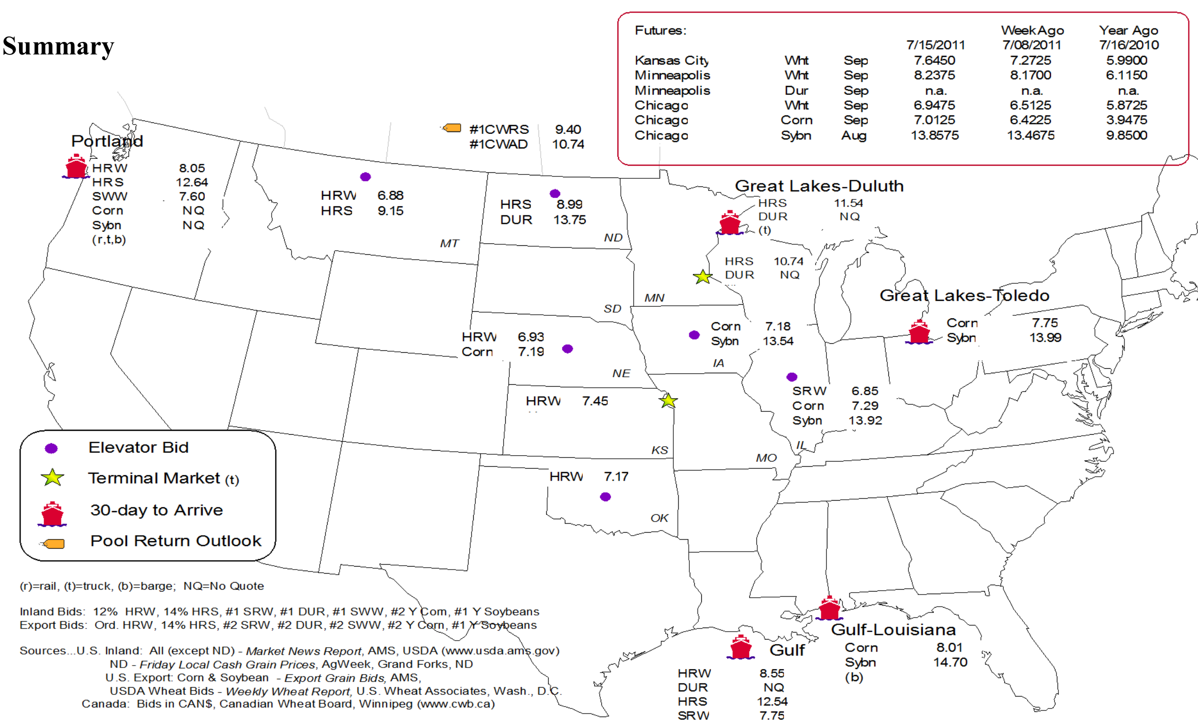
Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 1

Grain bid Summary



Rail Transportation

Table 3

Rail Deliveries to Port (carloads)[1]

Week ending	Mississippi Gulf	Texas Gulf	Cross-Border Mexico	Pacific Northwest	Atlantic & East Gulf	Total
7/13/2011[p]	167	799	988	3,756	283	5,993
7/06/2011[r]	209	1,054	1,467	2,316	182	5,228
2011 YTD	21,406	56,782	25,738	106,572	15,660	226,158
2010YTD	8,440	36,927	25,910	91,718	17,684	180,679
2011 YTD as % of 2010 YTD	254	154	99	116	89	125
Last 4 weeks as % of 2010[2]	171	83	113	108	208	107
Last 4 weeks as % of 4-year avg.[2]	46	63	142	91	89	87
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.

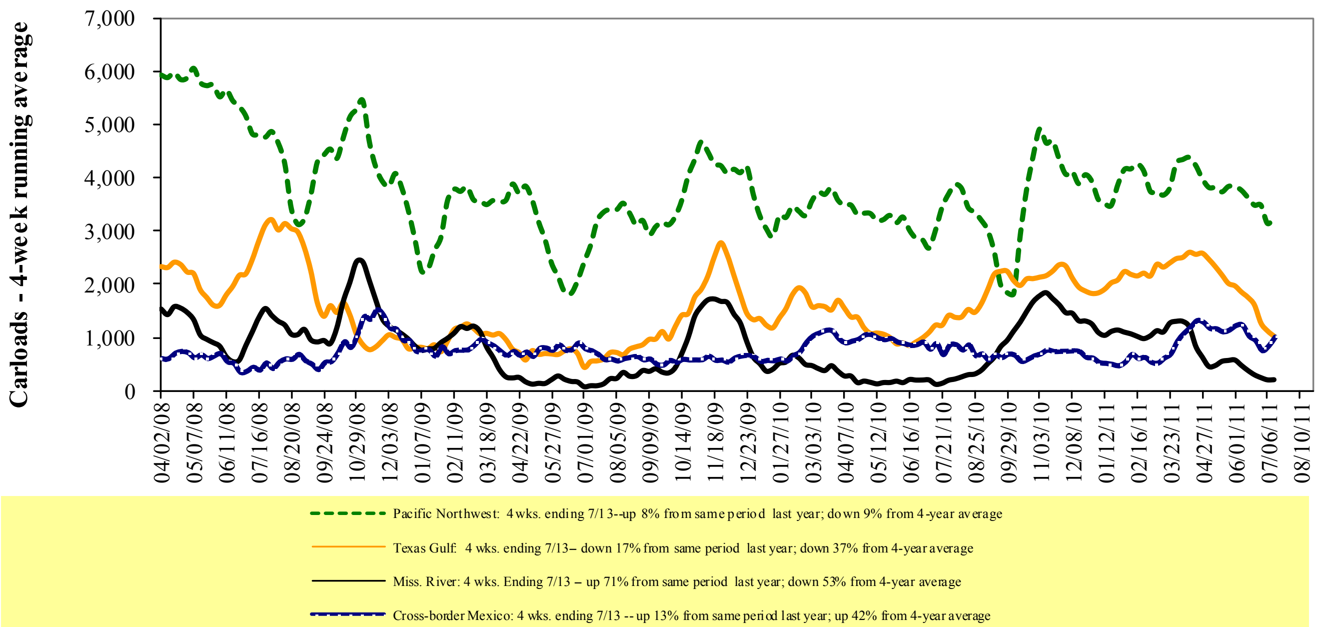
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)

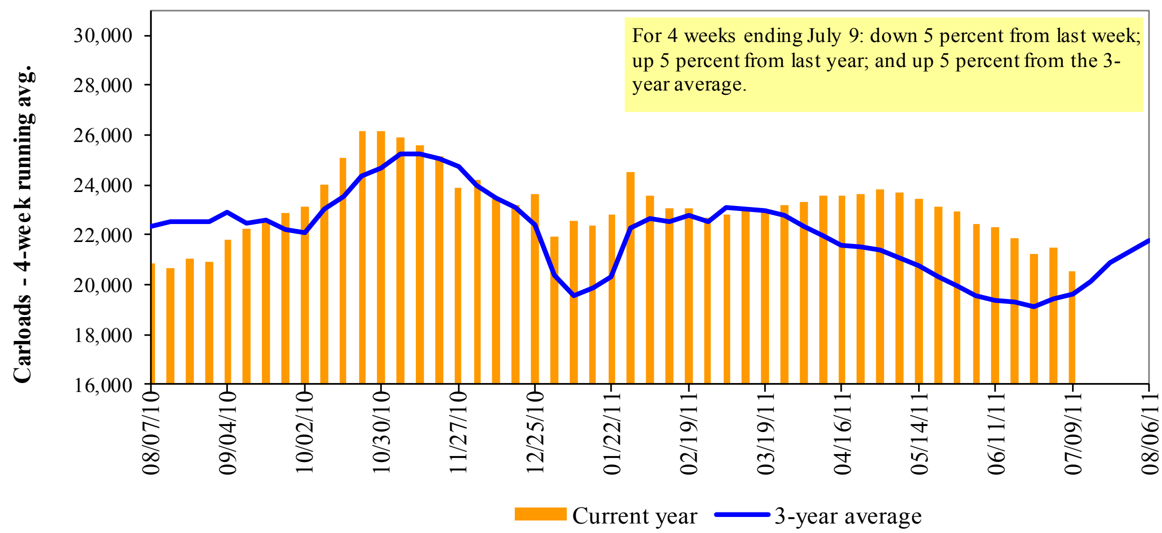
	East		West			U.S. total	Canada	
Week ending	CSXT	NS	BNSF	KCS	UP		CN	CP
07/09/11	1,569	2,748	8,093	609	5,095	18,114	3,728	4,636
This week last year	1,654	3,180	9,517	583	5,391	20,325	3,834	4,705
2011 YTD	53,937	82,704	297,675	18,419	164,127	616,862	106,762	132,074
2010 YTD	59,627	82,525	269,572	20,160	141,919	573,803	105,985	140,024
2011 YTD as % of 2010 YTD	90	100	110	91	116	108	101	94
Last 4 weeks as % of 2010[1]	84	98	108	110	113	105	110	125
Last 4 weeks as % of 3-yr avg.[1]	76	102	105	125	110	103	106	109
Total 2010	111,935	159,836	546,901	35,807	295,361	1,149,840	203,038	265,835

[1]As 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 Offerings[1] ($/car)[2]

Week ending	Delivery period							
7/14/2011	Jul-11	Jul-10	Aug-11	Aug-10	Sep-11	Sep-10	Oct-11	Oct-10
BNSF[3]								
COT grain units	no bids	n/a	0	177	no offer	181	81	no offer
COT grain single-car[5]	0 . . 51	n/a	no offer	126 . . 300	no offer	207 . . 303	75 . . 121	no offer
UP[4]								
GCAS/Region 1	no offer	n/a	no bids	no bids	no bids	no bids	n/a	no bids
GCAS/Region 2	no offer	n/a	no bids	no bids	no bids	1	n/a	no offer

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

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

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

[4]UP - GCAS = Grain Car Allocation System

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

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

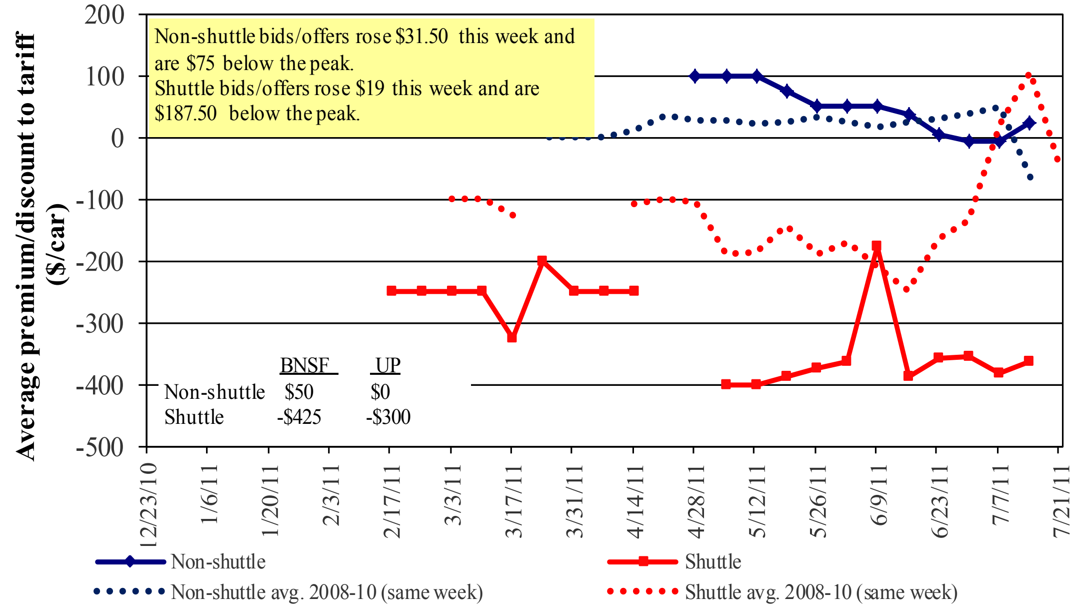
[5]Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

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

Figure 4

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

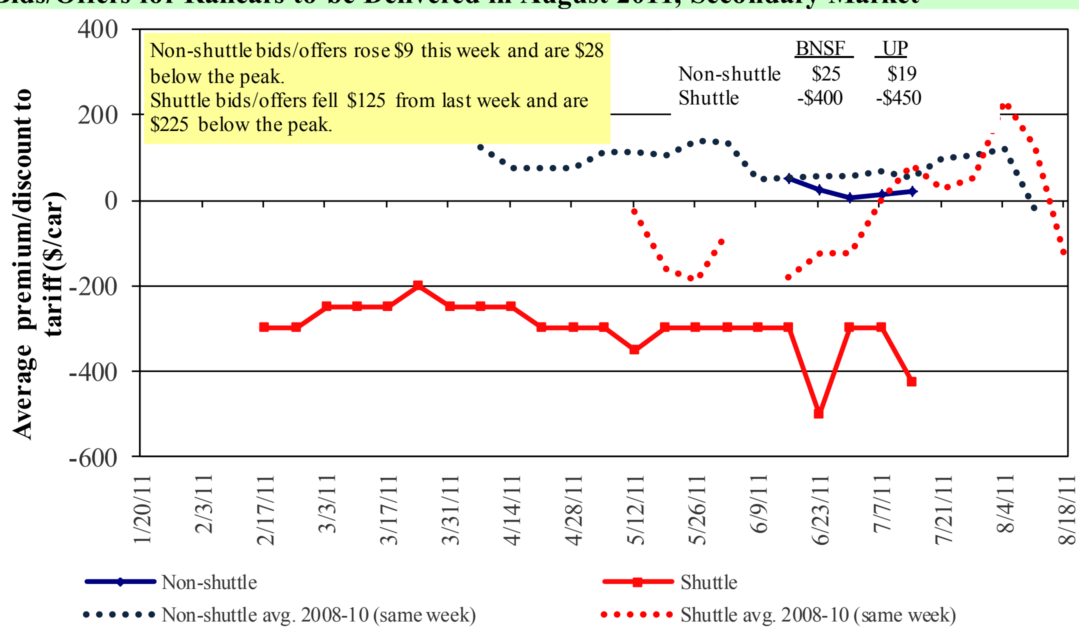


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

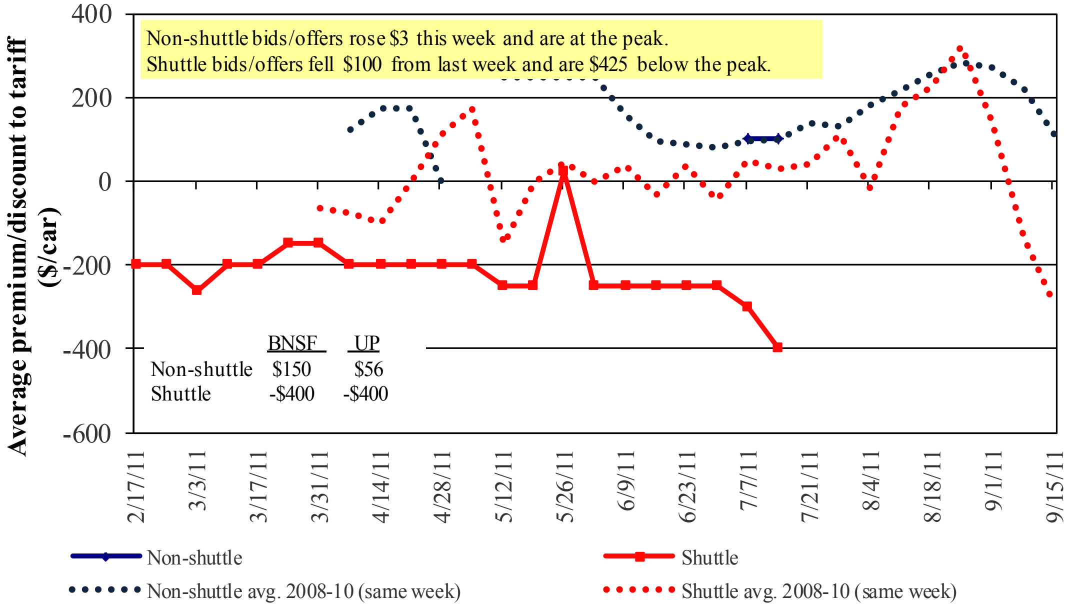


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in September 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					
7/14/2011	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11
Non-shuttle						
BNSF-GF	50	25	150	400	300	200
Change from last week	50	12	50	-	-	-
Change from same week 2010	n/a	(117)	-	n/a	n/a	n/a
UP-Pool	-	19	56	n/a	n/a	n/a
Change from last week	13	6	n/a	n/a	n/a	n/a
Change from same week 2010	n/a	(6)	(26)	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	(425)	(400)	(400)	n/a	400	(25)
Change from last week	(50)	n/a	n/a	n/a	(50)	n/a
Change from same week 2010	n/a	(550)	n/a	n/a	50	n/a
UP-Pool	(300)	(450)	(400)	550	263	-
Change from last week	88	(150)	(100)	125	n/a	n/a
Change from same week 2010	n/a	n/a	n/a	n/a	n/a	n/a

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

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

Table 7

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

Effective date: 7/5/2011	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[3]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$2,992	$197	$31.67	$0.86	11
	Grand Forks, ND	Duluth-Superior, MN	$2,822	$116	$29.18	$0.79	16
	Wichita, KS	Los Angeles, CA	$5,710	$597	$62.63	$1.70	10
	Wichita, KS	New Orleans, LA	$3,492	$347	$38.12	$1.04	11
	Sioux Falls, SD	Galveston-Houston, TX	$5,410	$490	$58.59	$1.59	6
	Northwest KS	Galveston-Houston, TX	$3,760	$380	$41.11	$1.12	11
	Amarillo, TX	Los Angeles, CA	$3,959	$529	$44.57	$1.21	12
Corn	Champaign-Urbana, IL	New Orleans, LA	$2,812	$392	$31.82	$0.87	7
	Toledo, OH	Raleigh, NC	$3,760	$450	$41.81	$1.14	14
	Des Moines, IA	Davenport, IA	$1,843	$83	$19.13	$0.52	-1
	Indianapolis, IN	Atlanta, GA	$3,196	$338	$35.09	$0.96	12
	Indianapolis, IN	Knoxville, TN	$2,760	$217	$29.56	$0.80	12
	Des Moines, IA	Little Rock, AR	$2,938	$244	$31.60	$0.86	7
	Des Moines, IA	Los Angeles, CA	$4,835	$711	$55.07	$1.50	20
Soybeans	Minneapolis, MN	New Orleans, LA	$3,109	$439	$35.24	$0.96	17
	Toledo, OH	Huntsville, AL	$2,921	$320	$32.18	$0.88	11
	Indianapolis, IN	Raleigh, NC	$3,830	$453	$42.54	$1.16	13
	Indianapolis, IN	Huntsville, AL	$2,613	$217	$28.10	$0.76	11
	Champaign-Urbana, IL	New Orleans, LA	$3,156	$392	$35.24	$0.96	10
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,239	$343	$35.57	$0.97	13
	Wichita, KS	Galveston-Houston, TX	$3,144	$267	$33.87	$0.92	7
	Chicago, IL	Albany, NY	$3,497	$422	$38.92	$1.06	-3
	Grand Forks, ND	Portland, OR	$4,702	$593	$52.58	$1.43	12
	Grand Forks, ND	Galveston-Houston, TX	$5,648	$617	$62.22	$1.69	10
	Northwest KS	Portland, OR	$4,727	$624	$53.13	$1.45	11
Corn	Minneapolis, MN	Portland, OR	$4,680	$722	$53.64	$1.46	13
	Sioux Falls, SD	Tacoma, WA	$4,640	$661	$52.64	$1.43	13
	Champaign-Urbana, IL	New Orleans, LA	$2,677	$392	$30.48	$0.83	7
	Lincoln, NE	Galveston-Houston, TX	$3,190	$385	$35.50	$0.97	10
	Des Moines, IA	Amarillo, TX	$3,330	$307	$36.12	$0.98	7
	Minneapolis, MN	Tacoma, WA	$4,680	$716	$53.59	$1.46	13
	Council Bluffs, IA	Stockton, CA	$4,080	$741	$47.87	$1.30	13
Soybeans	Sioux Falls, SD	Tacoma, WA	$4,840	$661	$54.63	$1.49	10
	Minneapolis, MN	Portland, OR	$4,830	$722	$55.13	$1.50	11
	Fargo, ND	Tacoma, WA	$4,730	$588	$52.81	$1.44	9
	Council Bluffs, IA	New Orleans, LA	$3,510	$452	$39.35	$1.07	9
	Toledo, OH	Huntsville, AL	$2,536	$320	$28.36	$0.77	13
	Grand Island, NE	Portland, OR	$4,520	$638	$51.23	$1.39	11

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

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

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

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

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

Table 8

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

Effective date: 7/4/2011				Fuel			Percent
	Origin		Tariff	surcharge	Tariff plus surcharge per:		change
Commodity	state	Destination region	rate/car[1]	per car[2]	metric ton[3]	bushel[3]	Y/Y[4]
Wheat	MT	Chihuahua, CI	$7,491	$627	$82.95	$2.26	15
	OK	Cuautitlan, EM	$6,610	$649	$74.17	$2.02	13
	KS	Guadalajara, JA	$7,210	$884	$82.70	$2.25	11
	TX	Salinas Victoria, NL	$3,656	$263	$40.04	$1.09	12
Corn	IA	Guadalajara, JA	$7,445	$918	$85.45	$2.17	11
	SD	Penjamo, GJ	$7,245	$821	$82.41	$2.09	9
	NE	Queretaro, QA	$6,802	$832	$78.00	$1.98	14
	SD	Salinas Victoria, NL	$5,360	$624	$61.14	$1.55	13
	MO	Tlalnepantla, EM	$5,959	$811	$69.17	$1.76	15
	SD	Torreon, CU	$6,248	$687	$70.86	$1.80	13
Soybeans	MO	Bojay (Tula), HG	$6,705	$803	$76.71	$2.09	10
	NE	Guadalajara, JA	$7,519	$913	$86.16	$2.34	14
	IA	El Castillo, JA[5]	$7,770	$815	$87.72	$2.39	12
	KS	Torreon, CU	$6,042	$628	$68.15	$1.85	15
Sorghum	OK	Cuautitlan, EM	$5,350	$623	$61.03	$1.55	18
	TX	Guadalajara, JA	$6,289	$534	$69.71	$1.77	12
	NE	Penjamo, GJ	$6,905	$845	$79.18	$2.01	8
	KS	Queretaro, QA	$6,038	$573	$67.54	$1.71	13
	NE	Salinas Victoria, NL	$4,818	$546	$54.81	$1.39	13
	NE	Torreon, CU	$5,804	$673	$66.18	$1.68	11

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

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

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

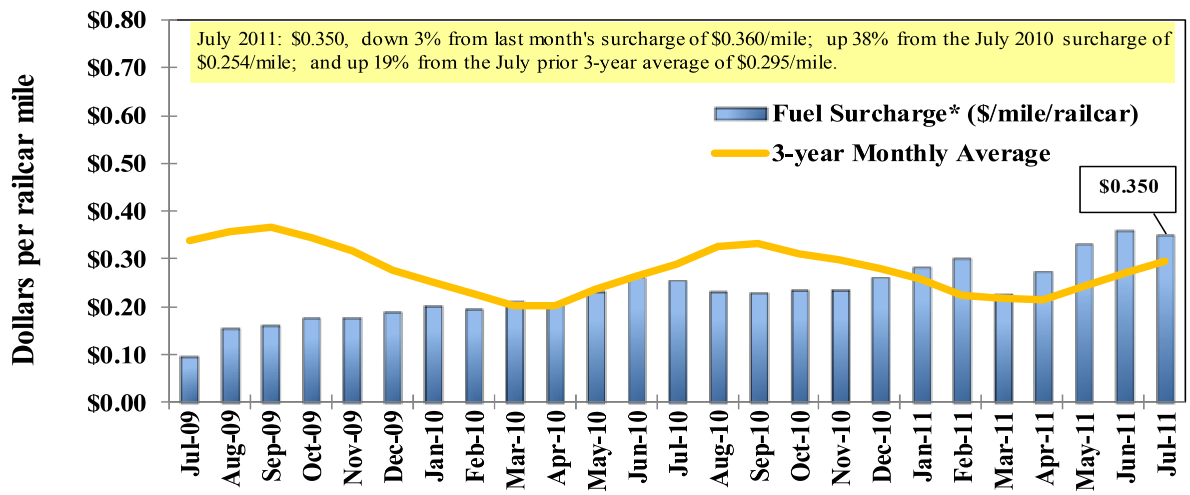
[4]Percentage change year over year calculated using tariff rate plus fuel surcharge

[5] Beginning 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 Average[1]



[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.

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

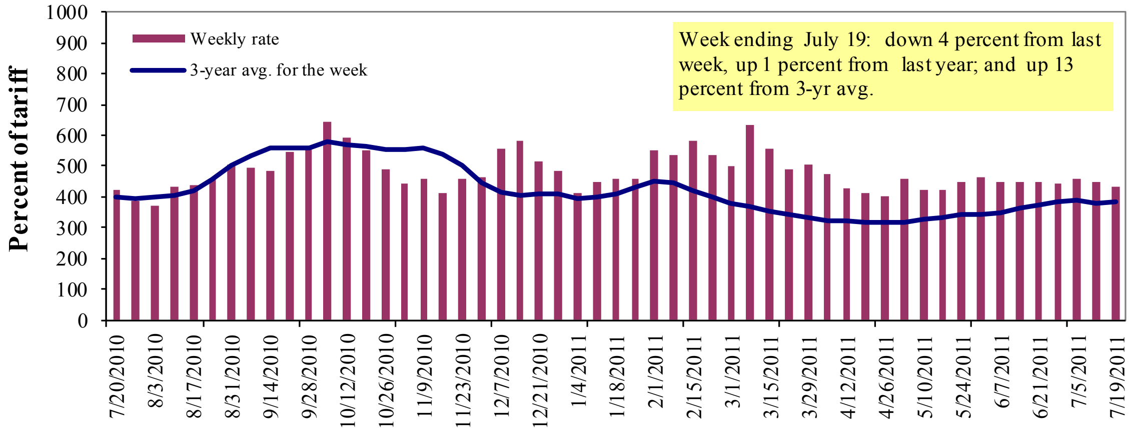
** BNSF strike price (diesel price when fuel surcharges begin) changed from $1.25/gal. to $2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was $0.227/mile instead of $0.331/mile.

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]



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	7/19/2011	515	433	431	313	395	395	300
	7/12/2011	533	461	449	334	400	400	308
$/ton	7/19/2011	31.88	23.04	20.00	12.49	18.53	15.96	9.42
	7/12/2011	32.99	24.53	20.83	13.33	18.76	16.16	9.67
Current week % change from the same week:								
	Last year	4	1	1	-4	-2	-2	-4
	3-year avg. [2]	14	9	13	11	27	27	21
Rate[1]	August	515	433	433	350	403	403	330
	October	663	652	647	600	638	675	595

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

Source: Transportation & Marketing Programs/AMS/USDA

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

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

Figure 9

Benchmark tariff rates

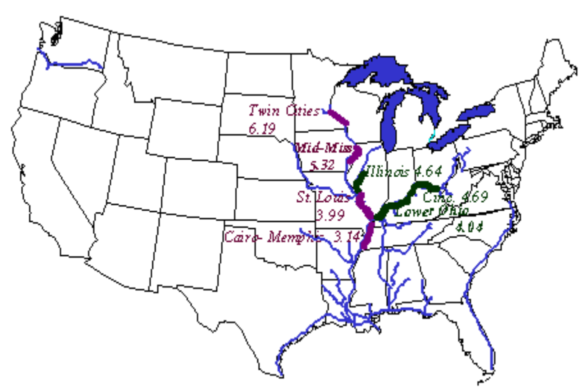
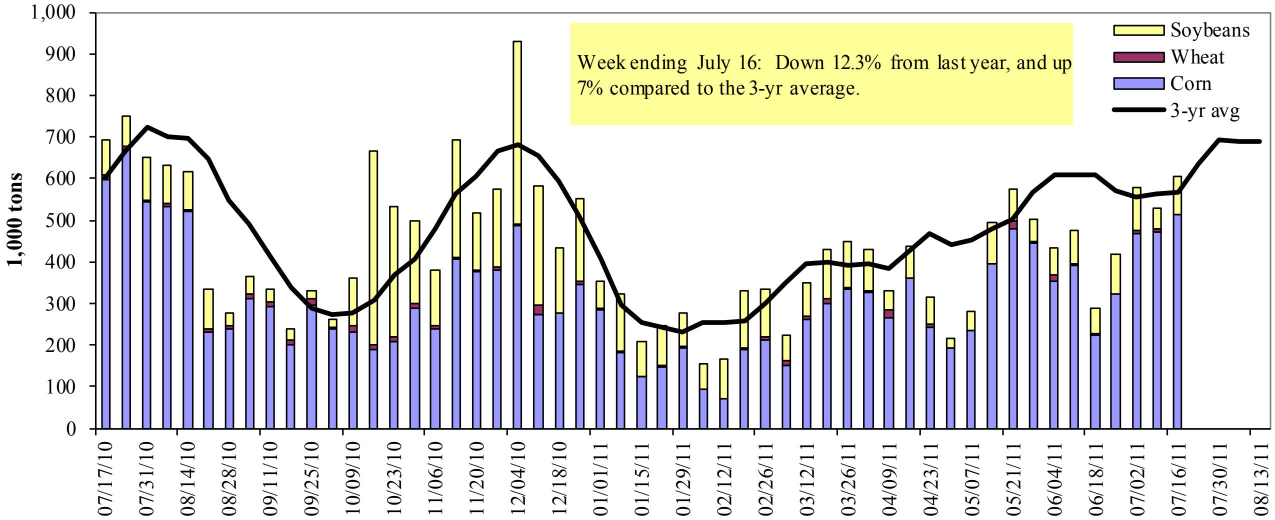


Figure 10

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



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

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

Table 10

Barge Grain Movements (1,000 tons)

Week ending 7/16/2011	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	236	0	55	5	296
Winfield, MO (L25)	405	0	89	0	494
Alton, IL (L26)	523	0	105	0	628
Granite City, IL (L27)	512	0	95	2	608
Illinois River (L8)	97	2	14	0	113
Ohio River (L52)	12	17	51	2	81
Arkansas River (L1)	0	24	5	4	33
Weekly total - 2011	523	42	151	7	723
Weekly total - 2010	636	48	97	9	791
2011 YTD[1]	10,326	822	4,101	171	15,420
2010 YTD	13,035	661	4,492	257	18,444
2011 as % of 2010 YTD	79	124	91	67	84
Last 4 weeks as % of 2010[2]	80	182	96	96	87
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.

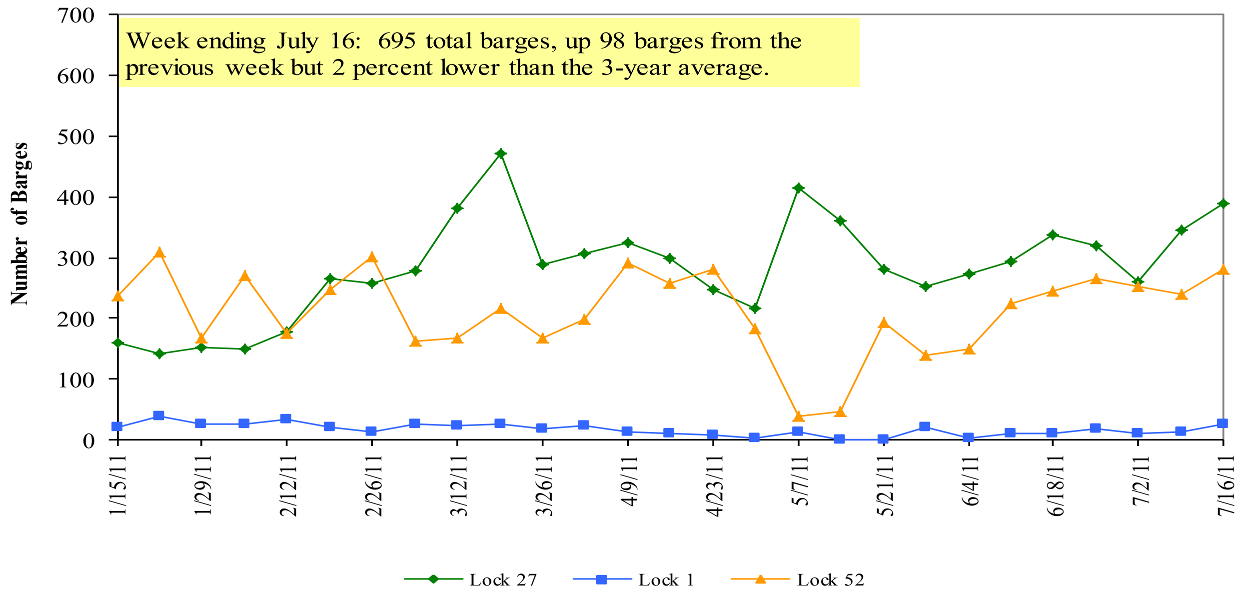
[2] As a percent of same period in 2010.

Note: Total may not add exactly, due to rounding

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

Figure 11

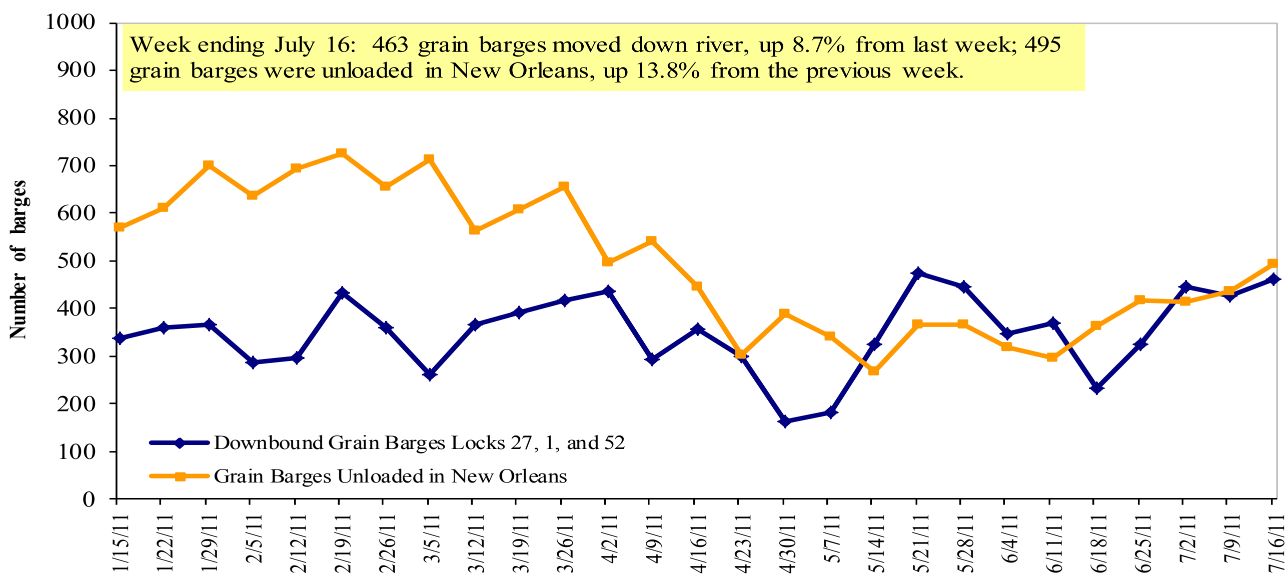
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



Source: U.S. Army Corps of Engineers

Figure 12

Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices[1], Week Ending 7/18/2011 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.963	0.037	1.050
	New England	4.034	0.022	1.019
	Central Atlantic	4.066	0.032	1.054
	Lower Atlantic	3.912	0.040	1.051
II	Midwest[2]	3.903	0.028	1.037
III	Gulf Coast[3]	3.882	0.026	1.023
IV	Rocky Mountain	3.827	-0.011	0.925
V	West Coast	4.005	-0.007	0.963
	California	4.114	0.015	0.998
Total	U.S.	3.923	0.024	1.024

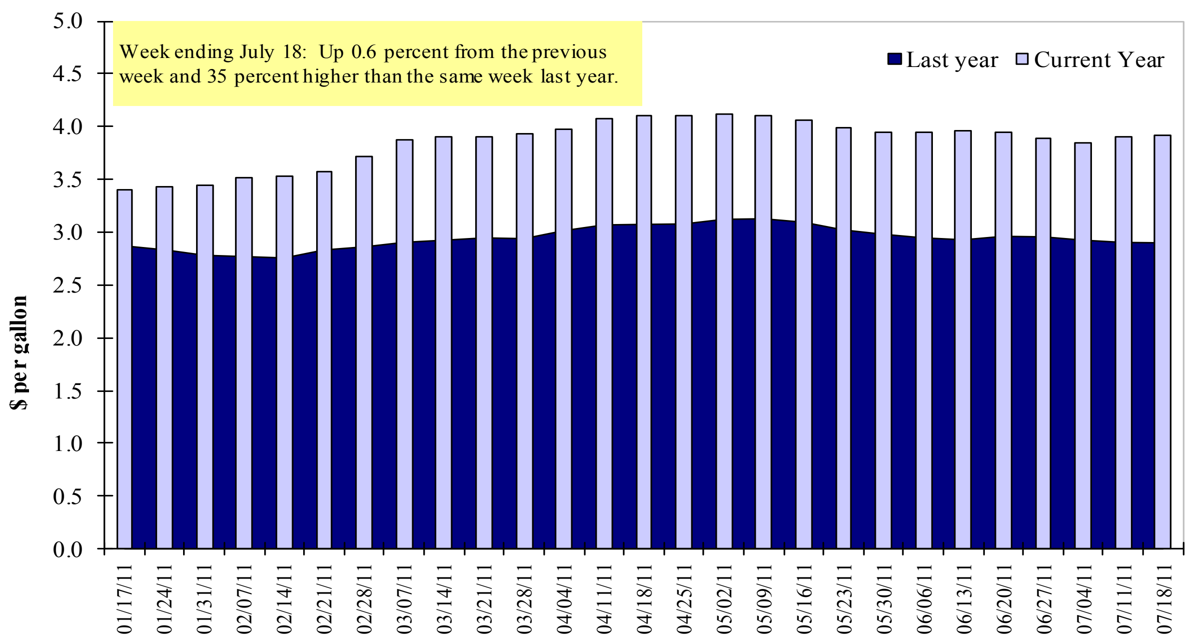
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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

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

Figure 13

Weekly Diesel Fuel Prices, U.S. Average



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

Grain Exports

Table 12

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

	Wheat						Corn	Soybeans	Total
Week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances[1]									
7/7/2011	1,993	997	1,806	1,133	74	6,003	7,888	3,435	17,326
This week year ago	1,980	523	1,044	978	286	4,812	9,495	2,912	17,219
Cumulative exports-marketing year[2]									
2010/11 YTD	1,462	325	772	592	90	3,241	38,416	38,364	80,021
2009/10 YTD	1,051	238	506	451	37	2,283	40,391	37,303	79,977
YTD 2010/11 as % of 2009/10	139	137	153	131	243	142	95	103	100
Last 4 wks as % of same period 2009/10	104	177	184	121	32	128	88	126	106
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 wheat

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

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

Table 13

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

Week ending 07/07/11	Total Commitments[2]			% change	Exports[3]
	2011/12	2010/11	2009/10	current MY	
	Next MY	Current MY	Last MY	from last MY	2009/10
		- 1,000 mt -			- 1,000 mt -
Japan	886	14,122	14,859	(5)	14,343
Mexico	1,838	6,867	7,936	(13)	7,999
Korea	226	5,739	7,688	(25)	7,562
Taiwan	3	2,653	3,045	(13)	2,949
Egypt	40	3,011	2,863	5	2,935
Top 5 importers	**2,993**	**32,393**	**36,391**	**(11)**	**35,788**
Total US corn export sales	**6,901**	**46,304**	**49,886**	**(7)**	**50,460**
% of Projected	14%	97%	99%		
Change from Last Week	1,199	481	678		
Top 5 importers' share of U.S. corn export sales	43%	70%	73%		
USDA forecast, July 2011	**48,260**	**47,630**	**50,460**	**(6)**	
Corn Use for Ethanol USDA forecast, Ethanol July 2011	**130,810**	**128,270**	**116,027**	**11**	

(n) indicates negative number.

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

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

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

Table 14

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

Week Ending 07/07/2011	Total Commitments[2] 2011/12 Next MY	2010/11 Current MY	2009/10 Last MY	% change current MY from last MY	Exports[3] 2009/10
	- 1,000 mt -				- 1,000 mt -
China	6,708	25,959	22,734	14	22,454
Mexico	131	3,090	3,179	(3)	3,276
Japan	120	2,225	2,411	(8)	2,347
EU-25	60	2,599	2,698	(4)	2,647
Taiwan	0	1,390	1,565	(11)	1,556
Top 5 importers	**7,019**	**35,263**	**32,586**	**8**	**32,280**
Total US soybean export sales	**8,271**	**41,799**	**40,215**	**4**	**40,850**
% of Projected	20%	101%	98%		
Change from last week	652	4	667		
Top 5 importers' share of U.S. soybean export sales	85%	84%	81%		
USDA forecast, July 2011	**40,690**	**41,370**	**40,850**	**1**	
Soybean Use for Biodiesel USDA forecast, July 2011	**8,393**	**5,515**	**4,031**	**37**	

(n) indicates negative number.

[1]Based on FAS 2008/09 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 15

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

Week Ending 07/07/2011	Total Commitments[2] 2011/12 Current MY	2010/11 Last MY	% change current MY from last MY	Exports[3] 2010/11
	- 1,000 mt -			- 1,000 mt -
Nigeria	1,036	1,010	3	3,233
Japan	1,272	770	65	3,148
Mexico	952	892	7	2,601
Philippines	1,053	843	25	1,518
Korea	293	484	(39)	1,111
Peru	359	332	8	923
Taiwan	240	148	63	913
Colombia	264	215	23	783
Indonesia	202	141	44	781
Yemen	170	0		659
Top 10 importers	**5,842**	**4,833**	**21**	**15,670**
Total US wheat export sales	**9,244**	**7,095**	**30**	**33,439**
% of Projected	30%	20%		
Change from last week	519	309		
Top 10 importers' share of U.S. wheat export sales	63%	68%		
USDA forecast, July 2011	**31,300**	**35,000**	**(11)**	

(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 07/14/11	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 2010	Last 4-weeks as % of 3-yr. avg.	Total[1] 2010
Pacific Northwest									
Wheat	156	220	71	7,931	5,751	138	117	165	11,062
Corn	226	180	126	5,346	5,484	97	85	87	9,950
Soybeans	0	58	0	3,324	4,518	74	124	43	10,191
Total	**383**	**458**	**84**	**16,601**	**15,753**	**105**	**102**	**102**	**31,203**
Mississippi Gulf									
Wheat	69	218	32	3,023	2,107	143	148	100	4,199
Corn	375	533	70	14,207	16,206	88	75	85	29,794
Soybeans	73	44	166	9,833	9,107	108	71	50	22,519
Total	**517**	**795**	**65**	**27,063**	**27,420**	**99**	**82**	**81**	**56,512**
Texas Gulf									
Wheat	225	110	205	7,675	4,226	182	112	112	9,339
Corn	0	25	0	780	964	81	141	53	1,859
Soybeans	0	0	n/a	763	667	114	0	0	1,916
Total	**225**	**135**	**167**	**9,219**	**5,856**	**157**	**114**	**104**	**13,115**
Great Lakes									
Wheat	46	2	2,088	638	266	240	154	269	1,897
Corn	8	12	63	45	39	114	0	161	119
Soybeans	0	0	n/a	22	0	n/a	0	0	655
Total	**53**	**14**	371	**705**	**305**	**231**	**195**	**199**	**2,672**
Atlantic									
Wheat	5	3	161	570	193	296	70	48	343
Corn	8	0	n/a	179	222	81	27	39	469
Soybeans	4	8	55	444	699	64	224	183	1,417
Total	**18**	**11**	**158**	**1,193**	**1,113**	**107**	**63**	**55**	**2,229**
U.S. total from ports[2]									
Wheat	501	553	91	19,838	12,542	158	120	124	26,839
Corn	618	750	82	20,556	22,915	90	79	85	42,192
Soybeans	77	110	70	14,387	14,990	96	86	48	36,699
Total	**1,196**	**1,413**	**85**	**54,781**	**50,447**	**109**	**93**	**91**	**105,730**

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

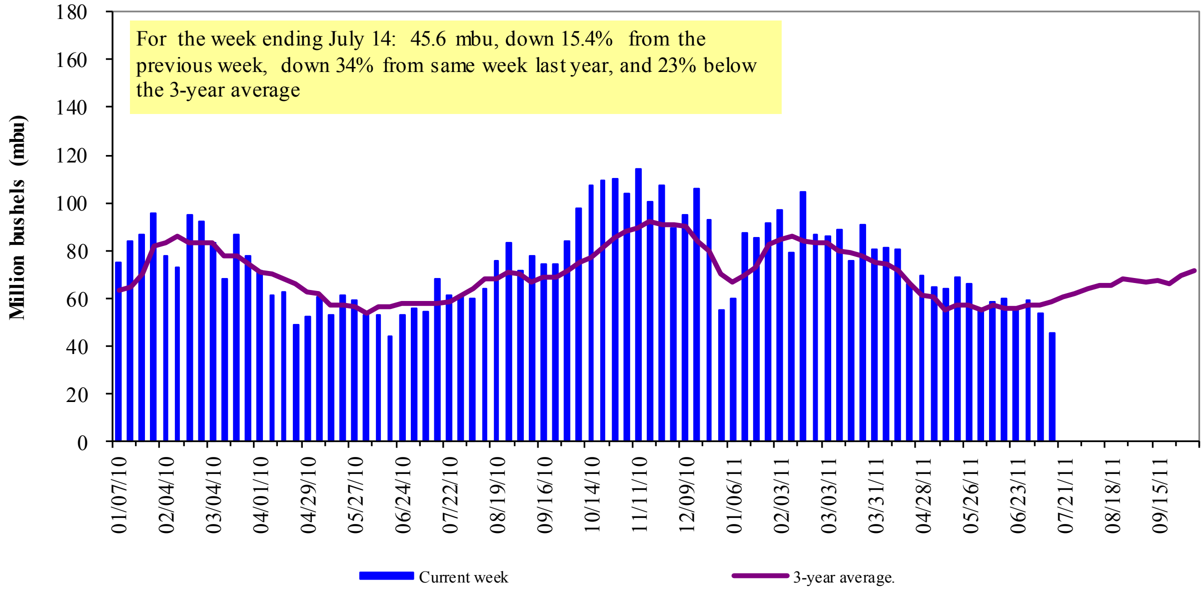
[2] Total includes only port regions shown above

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)

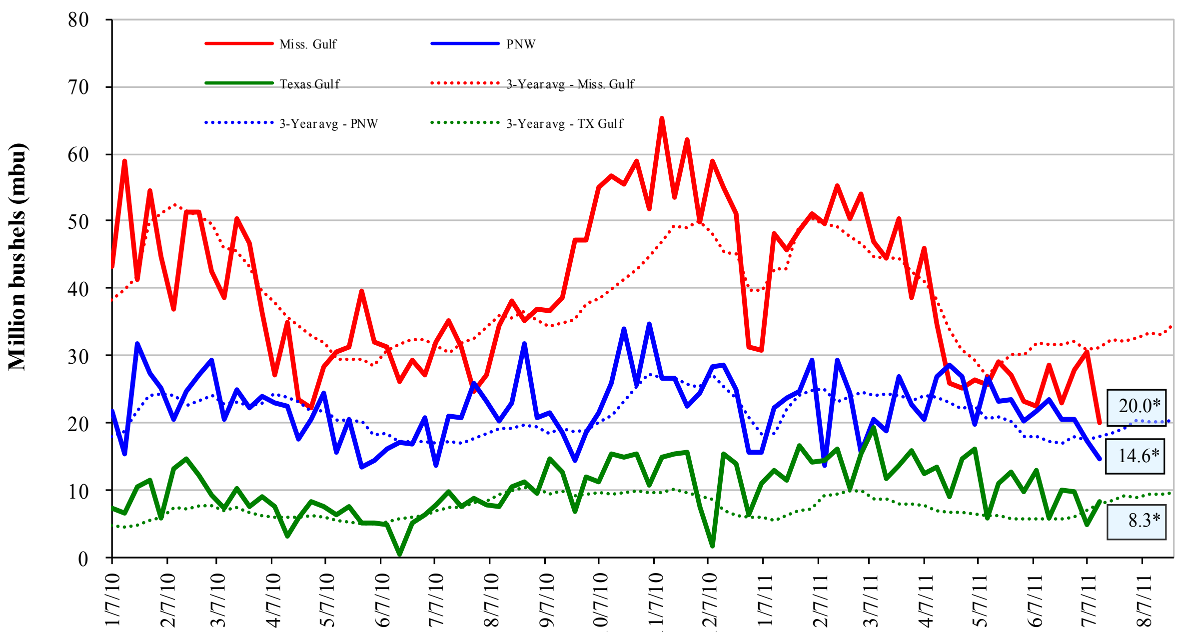


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

July 14 % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 34	up 65	down 20	down 16
Last year (same week)	down 43	down 17	down 38	down 30
3-yr avg. (4-wk mov. avg.)	down 36	up 3	down 28	down 27

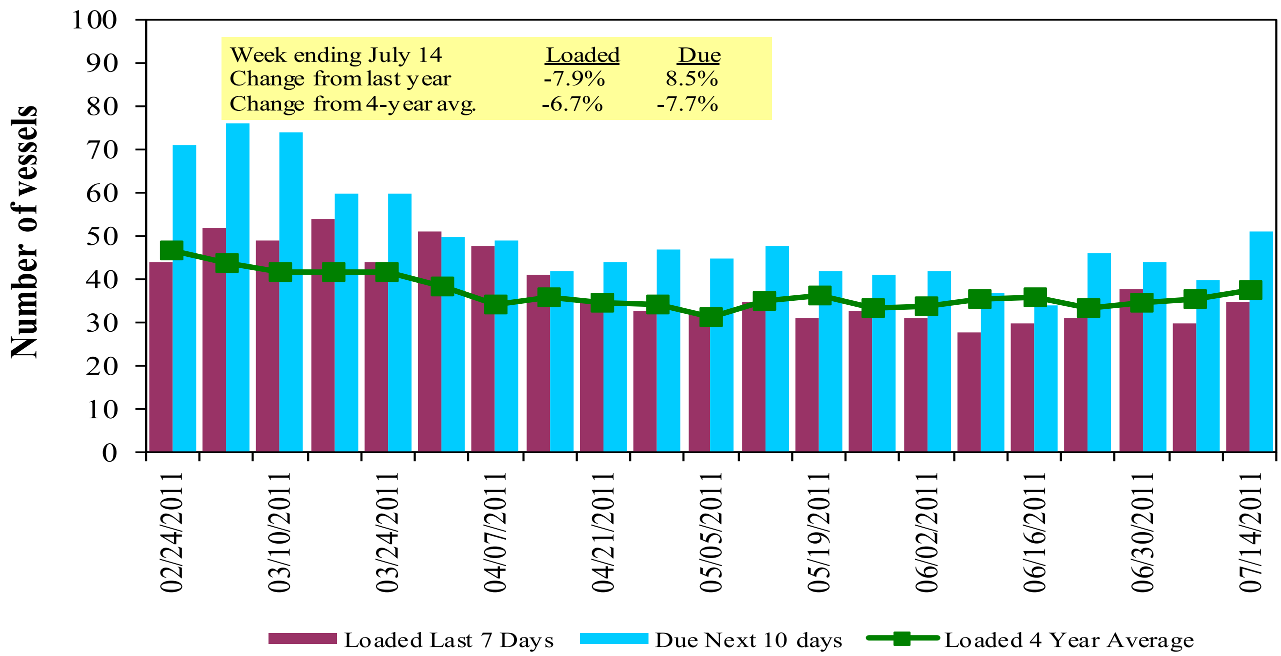
Ocean Transportation

Table 17
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
7/14/2011	16	35	51	10	12
7/7/2011	25	30	40	11	12
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

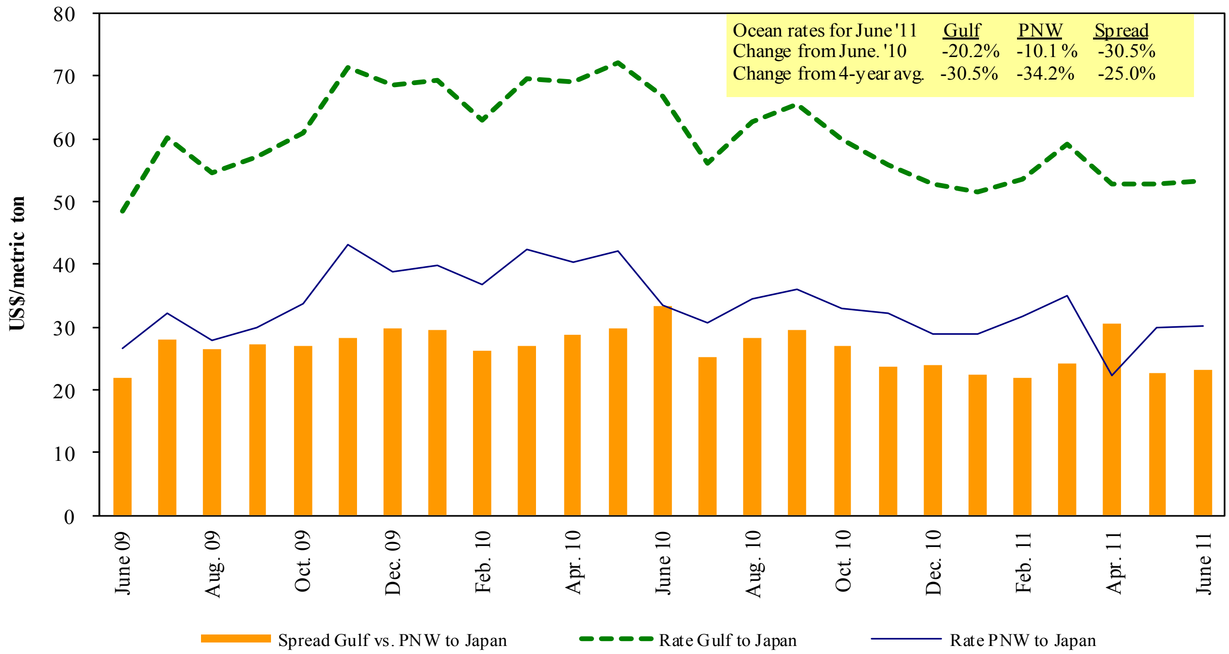
Figure 16
U.S. Gulf[1] Vessel Loading Activity



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

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 07/16/2011

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	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	Isreal	Wheat	May 20/30	50,000	36.00
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
Brazil	China	Heavy Grain	May 18/27	60,000	49.50
Brazil	China	Heavy Grain	April 5/15	60,000	51.00
Brazil	Turkey	Heavy Grain	May 20/30	50,000	32.00
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	Morocco	Heavy Grain	Apr 25/28	2,500	44.50
River Plate	Spain	Maize	May 16/18	25,000	44.00
River Plate	Spain	Corn	Apri 24/25	2,500	46.00
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

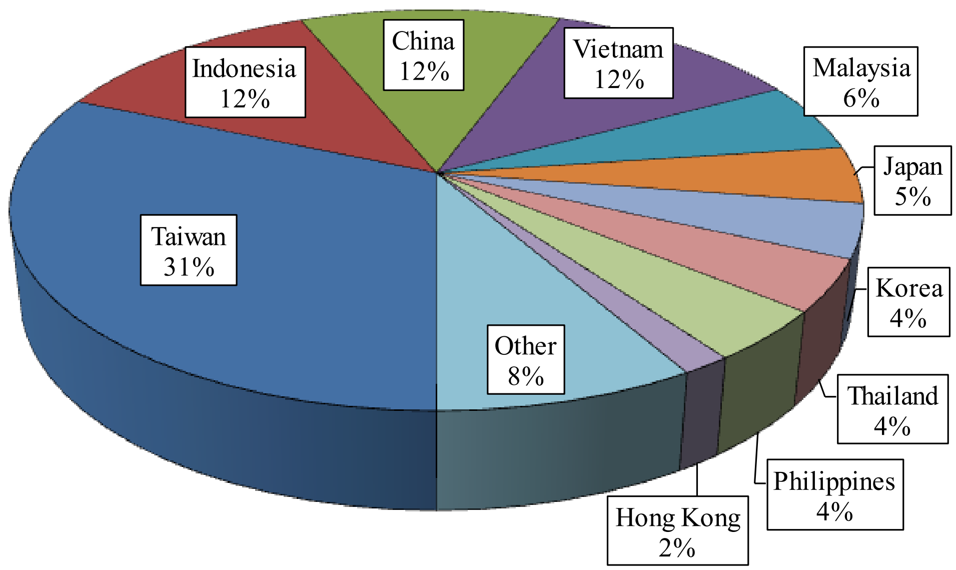
[1]75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 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, April 2011

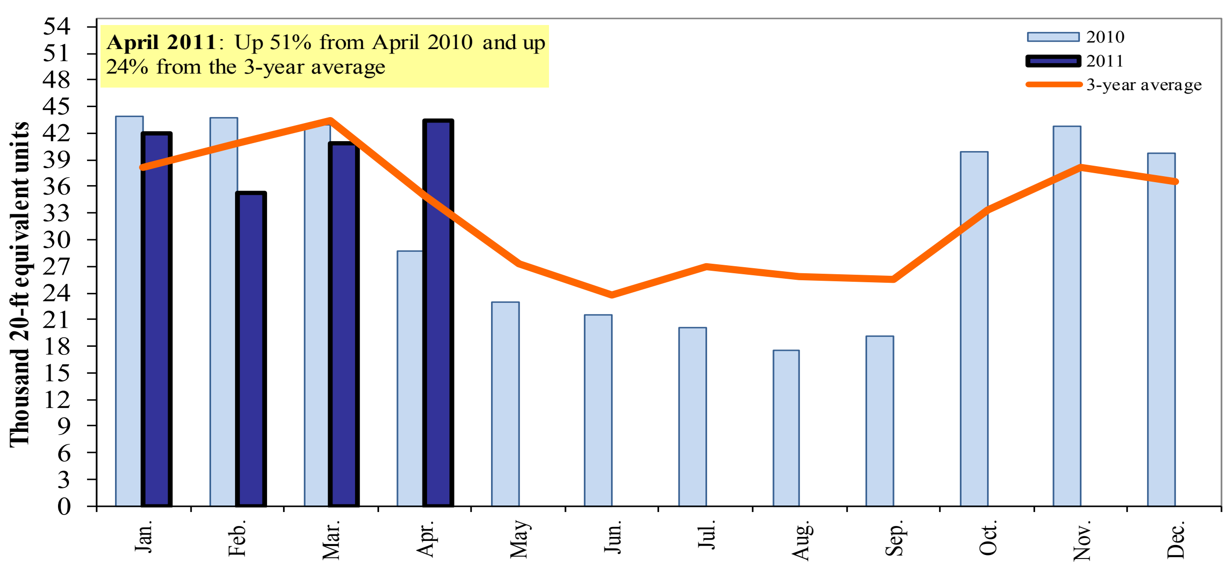


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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