



**Agricultural
Marketing
Service**



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Transportation and Marketing Programs/Transportation Services Division
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WEEKLY HIGHLIGHTS

Gulf Loading Activity Expected to Pick Up After Holidays, Rates Remain Relatively High

Grain **vessel** loading activity in the U.S. Gulf is expected to increase following the holidays. In the week ending December 31, 71 **ocean going vessels** were expected to be loaded within the next 10 days, up from 58 vessels during the previous week. An average of 73 vessels per week was expected to be loaded during the eight weeks prior to the holiday. Meanwhile, the cost of shipping bulk commodity remains relatively high. As of December 23, the cost of shipping grain from the Gulf to Japan was \$68 per mt—a 183 percent increase over the same period last year. The cost of shipping from PNW to Japan was about \$39 per mt, a 199 percent increase compared to the same period last year. Rising ocean rates may be attributed to an increased level of shipping activity in China, Japan and other Asian countries as the global economy shows signs of improving.

Ice Stops and Slows Barge Traffic

As of January 4, several barge operators have stopped operations on the Illinois River as extreme cold weather has created ice accumulations that have made navigation hazardous. Operations have slowed at the Melvin Price Locks on the Mississippi River as ice is flushed through the lock chambers periodically so that barges may transit the facility. The Illinois River and Melvin Price Locks are normally open for much of the winter months. Weather forecasts indicate that colder than normal temperatures may persist through the first half of January or longer. Several long-range forecasts speculate that this could be the coldest winter in 25 years for most of the country. Under severe winter conditions, barge operations could be slowed until late February or early March.

Diesel Fuel Prices on the Rise

Average **diesel fuel prices** rose 6 cents per gallon this week to \$2.80—22 percent higher than last week and 22 percent higher than the 3-year average. According to the Energy Information Administration’s most recent Short-Term Energy Outlook, diesel fuel prices are forecast to average \$2.96 per gallon in 2010—nearly 20 percent higher than the 2009 average price. Spot oil prices have also jumped recently to over \$80 per barrel, increasing the production cost of fuels; oil prices are forecast to average above \$70 per barrel in 2010. Higher fuel costs result in increased transportation costs particularly for truck transportation, which relies on diesel fuel for normal operations and rail transportation which ties fuel surcharges to U.S. average diesel fuel prices. Railroad fuel surcharges have increased for the past three months, growing from \$0.170 per railcar mile in November to \$0.201 in January, an 18 percent increase.

Grain Inspections Recede

In the week ending December 31, **total inspections** of grain (corn, wheat and soybeans) from major U.S. export regions reached 1.58 million metric tons (mmt), down 35 percent from the previous week, but 60 percent above last year at this time. Inspections were down in each of the major export regions, with the Pacific Northwest experiencing the largest drop—down 56 percent. Total corn and soybean inspections decreased 28 and 43 percent, respectively, from the previous week. Wheat inspections dropped 14 percent from the past week.

Snapshots by Sector

Rail

U.S. railroads originated 15,162 **carloads of grain** during the week ending December 26, down 36 percent from the previous week, up 32 percent from the same week last year, and 28 percent lower than the 3-year average.

During the week ending January 2, average January **secondary railcar bids/offers** were \$11 above tariff for non-shuttle, \$4 lower than last week. Shuttle rates were \$242 above tariff, \$160 higher than last week.

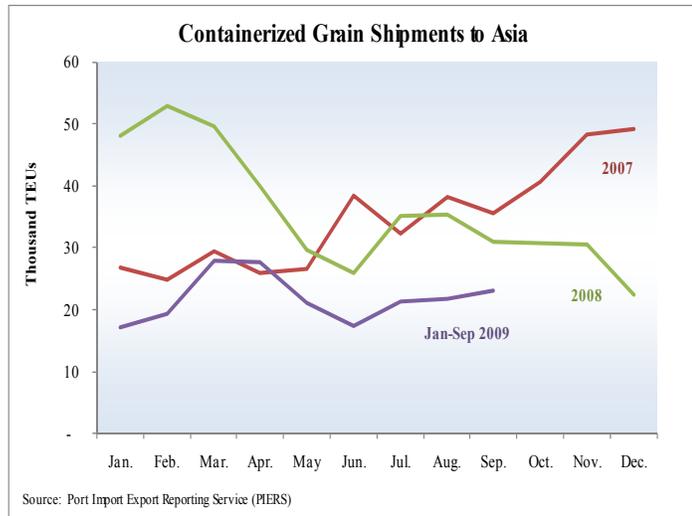
Ocean

During the week ending December 31, 48 **ocean-going grain vessels** were loaded in the U.S. Gulf, up 33 percent from last year. Seventy-one vessels are expected to be loaded in the Gulf within the next 10 days, up 45 percent from last year.

Feature Article/Calendar

Containerized Grain Movements Lower in 2009

Containerized grain shippers have experienced a tough year with challenges in finding available containers and vessel capacity. However, shippers have been able to take advantage of relatively low rates most of the year due to the recession, which has resulted in drastically lower demand for ocean container service globally. Containerized grain exporters moved over 196,000 TEUs¹ during the first 9 months of 2009—54 percent less than the 2008 record level, and 43 percent below the 3-year average (see graph). These decreases are likely due to recessionary pressures and constricted container availability in the Nation's heartland.



Overall containerized imports to the United States remain low, particularly after the peak holiday import season which lasts typically from August through October. This low volume of containerized imports restricts the available container supply for U.S. exporters. Ocean container carriers predict that

container availability will continue to be a challenge through the beginning of 2010. Containerized grain shippers in the Upper Midwest continue to experience container availability challenges. Chicago had periods in 2009 of ample container supply, but overall availability during the year was inadequate. Even more limited were container supplies in Minneapolis, which ran a consistent container deficit for most of the year. However, grain shippers in the center of the country found sufficient container supplies in Memphis and Kansas City due to more consistent supplies of import containers and less demand for export service. During times of tough container availability challenges, grain shippers often use bulk ocean service when possible, particularly when rates are low as they were in 2009. Additionally, containerized grain shippers often use rail service to move grain to transload facilities located near ocean ports to take advantage of the typically more plentiful supply of containers at the ports.

Vessel capacity has also been a challenge this year for containerized grain shippers. More than 10 percent of the global container vessel fleet is out of service due to the poor economic conditions and carriers predict that number will grow. In addition, ocean carriers have taken rotations out of service and they predict more of this to come in 2010. Carriers are implementing cost cutting measures such as the more extensive use of vessel sharing agreements to reduce the number of vessels the carriers have to service. In addition, carriers are deploying larger vessels which carry more containers on fewer trips. Carriers are also moving vessels at a slower pace to conserve fuel and avoid more costly canal transits and intermodal movements across the United States. All of these measures reduce costs for the carriers but cause service volatility and reduce overall capacity for U.S. exporters. As a result of these cost cutting measures by the carriers, shippers report fewer vessel options and delays to the next available vessel.

Rates Continue an Upward Trend

Rates for containerized grain movements were relatively low during most of 2009. However, in June the ocean carriers began announcing General Rate Increases (GRIs) on a regular basis. Carriers announced increases in June, September, and December, and yet again in January. Carriers report these increases will continue throughout 2010 until rates are at a level of recovering costs for the movement. Exporters have negotiated rate terms in their contracts with ocean carriers; however, these contracts typically include a clause allowing the ocean carrier to introduce GRIs. Import cargo, by contrast, typically does not have the GRI clause allowing import rates to remain constant even through the global recession. Until the import contracts can be renegotiated, the only available place to increase rates and boost revenue for the carriers is on export shipments.

¹ TEU is an acronym for twenty-foot equivalent unit. Marine shipping containers are most commonly 20-ft or 40-ft in length. Container movements are calculated in terms of TEUs.

Looking Forward

The pace of the economic recovery remains the theme for 2010. However, carriers expect conditions to remain lackluster, for the foreseeable future—which may require further reductions in vessel capacity and persistent container availability challenges for containerized grain shippers. Exporters will likely have to contend with tight ocean vessel capacity and container supplies. Rates are projected by carriers to continue to go up as they attempt to reclaim revenue from the last year of low rates. Exporters are being encouraged by carriers to make advance reservations and communicate regularly with ocean carriers about vessel capacity and container availability.

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Grain Transportation Indicators

Table 1
Grain Transport Cost Indicators¹

Week ending	Truck	Rail ²	Barge	Ocean	
				Gulf	Pacific
01/06/10	183	95	211	n/a	n/a
12/30/09	183	110	200	304	262

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	1/1/2010	12/25/2009
Corn	IL--Gulf	n/a	n/a
Corn	NE--Gulf	n/a	n/a
Soybean	IA--Gulf	n/a	n/a
HRW	KS--Gulf	n/a	n/a
HRS	ND--Portland	n/a	n/a

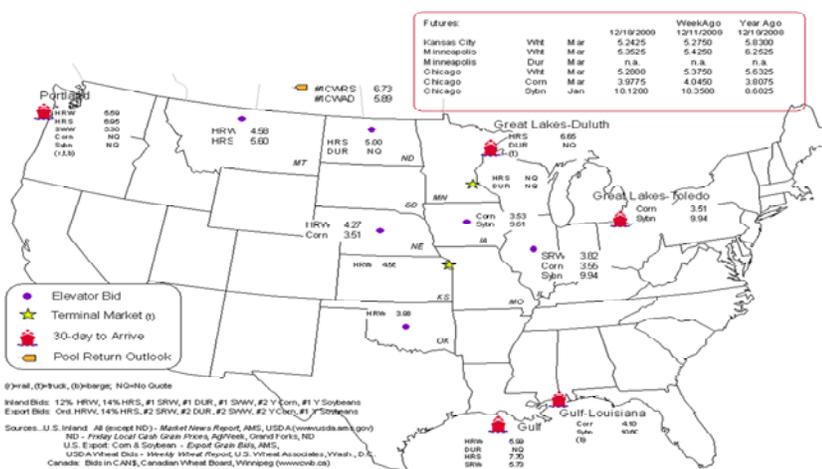
Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

* Data unavailable due to holidays.

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



* Due to unavailable data Figure 1 is republished from last week's data.

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	
12/30/2009 ^p	277	1,068	224	2,395	659	4,623
12/23/2009 ^r	417	1,330	726	4,329	1,329	8,131
2009 YTD	33,423	57,646	36,661	175,965	30,328	334,023
2008 YTD	68,768	107,542	37,491	255,852	33,028	502,681
2009 YTD as % of 2008 YTD	49	54	98	69	92	66
Last 4 weeks as % of 2008 ²	75	164	83	130	207	128
Last 4 weeks as % of 4-year avg. ²	47	78	85	90	196	88
Total 2008	68,768	107,542	37,491	255,852	33,028	502,681
Total 2007	62,169	113,730	40,962	227,970	31,369	476,200

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2008 and prior 4-year average.

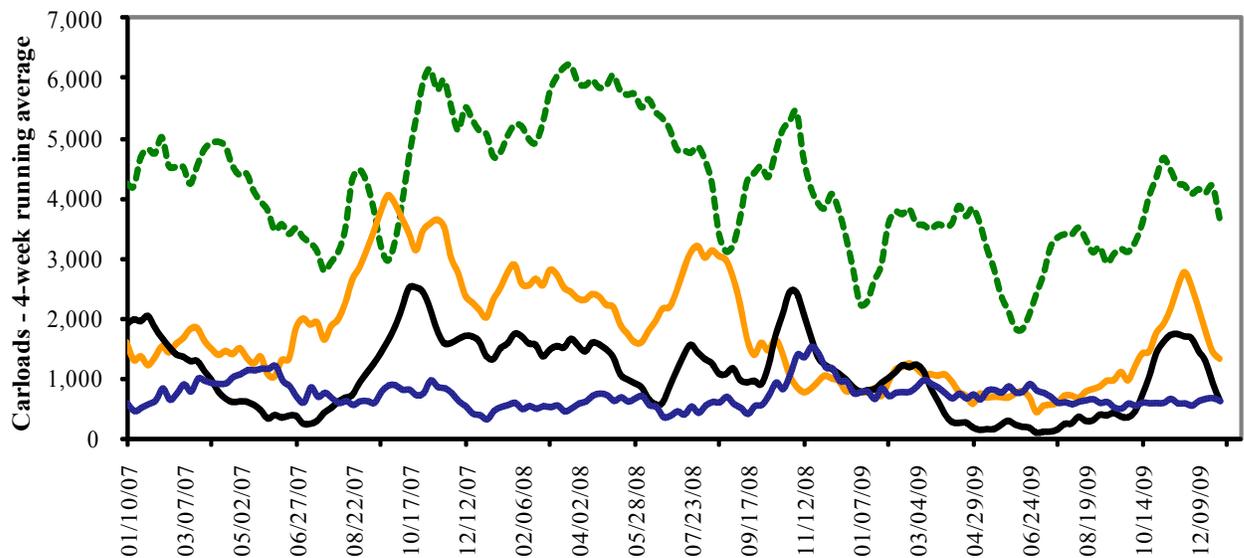
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 35 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail Deliveries to Port



--- Pacific Northwest: 4 Wks. ending 12/30-- up 30% from same period last year; down 10% from 4-year average
--- Texas Gulf: 4 wks. ending 12/30 -- up 64% from same period last year; down 22% from 4-year average
--- Miss. River: 4 wks. ending 12/30 -- down 25% from same period last year; down 53% from 4-year average
--- Cross-border Mexico: 4 wks. ending 12/30 -- down 17% from same period last year; down 15% from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

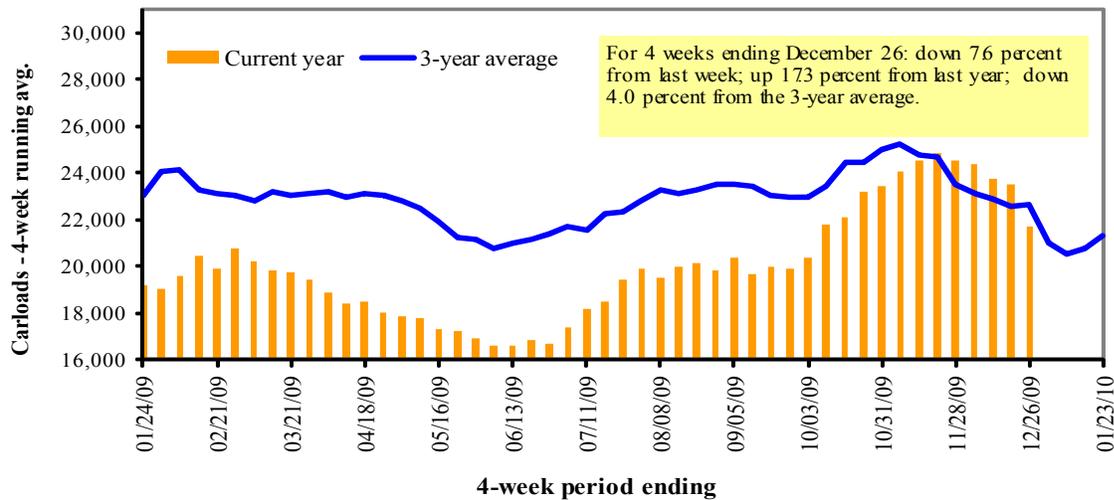
Table 4

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
12/26/09	1,520	1,889	7,596	524	3,633	15,162	2,603	3,579
This week last year	1,280	1,466	5,032	399	3,322	11,499	3,450	2,931
2009 YTD	103,607	139,777	475,318	36,533	263,971	1,019,206	7,757	275,710
2008 YTD	134,250	159,600	565,141	37,310	318,993	1,215,294	3,247	217,732
2009 YTD as % of 2008 YTD	77	88	84	98	83	84	89	127
Last 4 weeks as % of 2008 ¹	109	124	119	95	117	117	83	119
Last 4 weeks as % of 3-yr avg. ¹	75	102	99	108	96	96	67	107
Total 2008	136,143	162,177	573,285	37,822	323,104	1,232,531	6,849	220,714

¹As a percent of the same period in 2008 and the prior 3-year average. YTD = year-to-date.

Source: A 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							
	Jan-10	Jan-09	Feb-10	Feb-09	Mar-10	Mar-09	Apr-10	Apr-09
BNSF ³								
COT grain units	2	no offer	no bids	no bids	0	no bids	0	no bids
COT grain single-car ⁵	4 . . 15	no offer	0 . . 1	0	0	0	no bids	0
UP ⁴								
GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no bids	no offer	no offer
GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	no bids	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 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 January 2010, Secondary Market

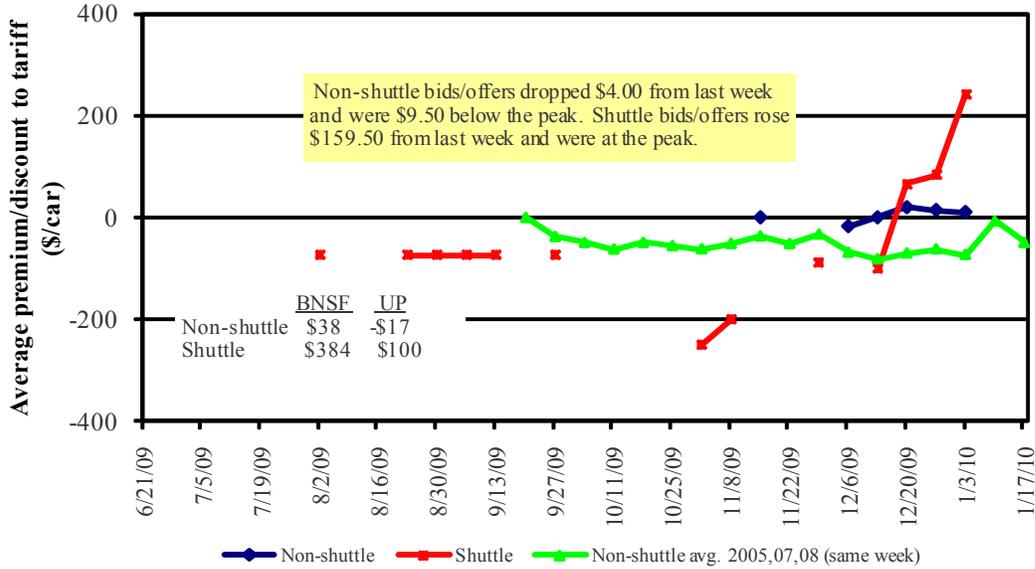
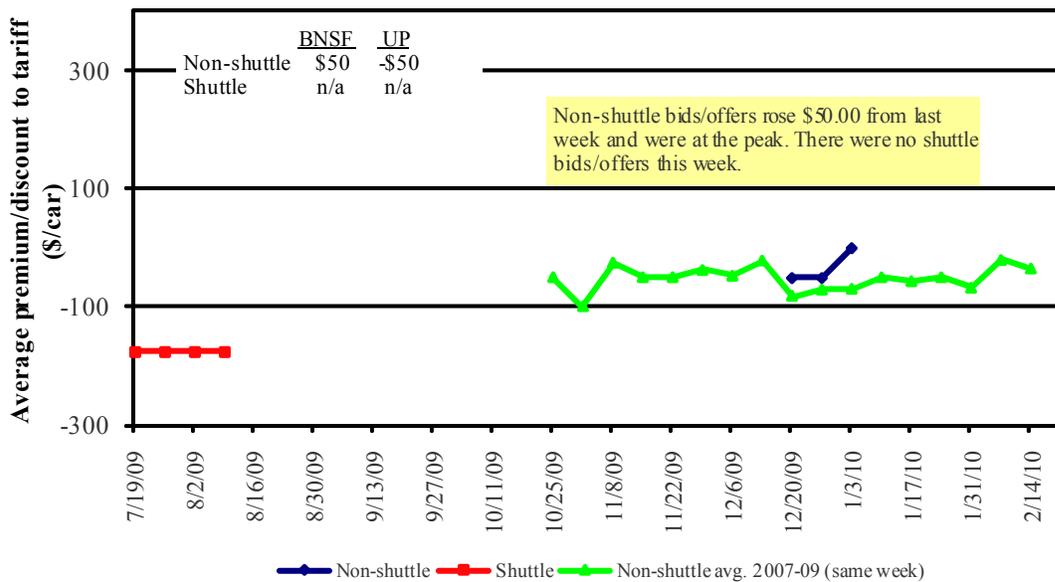


Figure 5

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

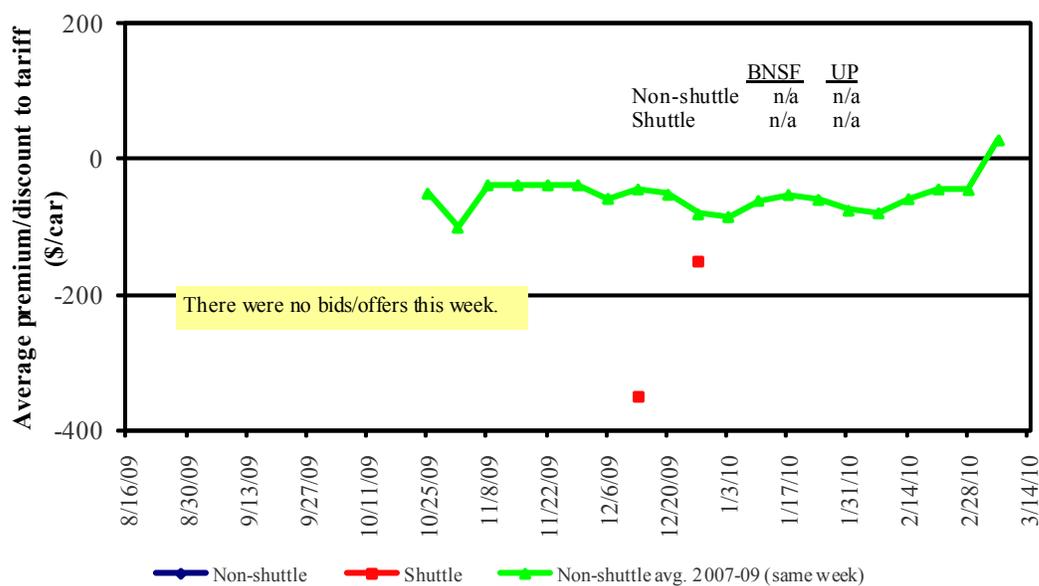


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

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



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 6

Weekly Secondary Rail Car Market (\$/car)¹

Week ending	Delivery period					
	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10
1/2/2010						
Non-shuttle						
BNSF-GF	38	50	n/a	n/a	n/a	n/a
Change from last week	-8	n/a	n/a	n/a	n/a	n/a
Change from same week 2008	80	93	n/a	n/a	n/a	n/a
UP-Pool	-17	-50	n/a	n/a	n/a	n/a
Change from last week	0	0	n/a	n/a	n/a	n/a
Change from same week 2008	108	-25	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	384	n/a	n/a	n/a	n/a	-150
Change from last week	294	n/a	n/a	n/a	n/a	0
Change from same week 2008	751	n/a	n/a	n/a	n/a	n/a
UP-Pool	100	n/a	n/a	n/a	n/a	-175
Change from last week	25	n/a	n/a	n/a	n/a	25
Change from same week 2008	313	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 Shipments¹

Effective date:			Tariff	Fuel	Tariff plus surcharge per:		Percent
1/4/2010	Origin region	Destination region	rate/car	surcharge per car	metric ton	bushel ²	change Y/Y ³
Unit train¹							
Wheat	Chicago, IL	Albany, NY	\$2,622	\$96	\$29.96	\$0.82	6
	Kansas City, MO	Galveston, TX	\$2,678	\$116	\$30.79	\$0.84	5
	South Central, KS	Galveston, TX	\$3,655	\$274	\$43.31	\$1.18	7
	Minneapolis, MN	Houston, TX	\$3,799	\$555	\$47.99	\$1.31	6
	St. Louis, MO	Houston, TX	\$3,565	\$112	\$40.53	\$1.10	7
	South Central, ND	Houston, TX	\$5,348	\$617	\$65.75	\$1.79	1
	Minneapolis, MN	Portland, OR	\$4,200	\$674	\$53.72	\$1.46	5
	South Central, ND	Portland, OR	\$4,200	\$553	\$52.40	\$1.43	5
	Northwest, KS	Portland, OR	\$5,100	\$737	\$64.34	\$1.75	4
Corn	Chicago, IL	Richmond, VA	\$2,834	\$175	\$33.17	\$0.90	9
	Chicago, IL	Baton Rouge, LA	\$2,925	\$142	\$33.80	\$0.86	-7
	Council Bluffs, IA	Baton Rouge, LA	\$3,020	\$151	\$34.96	\$0.89	-7
	Kansas City, MO	Dalhart, TX	\$3,284	\$200	\$38.40	\$0.98	0
	Minneapolis, MN	Portland, OR	\$3,609	\$674	\$47.21	\$1.20	3
	Evansville, IN	Raleigh, NC	\$3,204	\$171	\$37.20	\$0.95	6
	Columbus, OH	Raleigh, NC	\$3,093	\$150	\$35.75	\$0.91	6
	Council Bluffs, IA	Stockton, CA	\$4,900	\$728	\$62.04	\$1.58	-9
	Chicago, IL	Baton Rouge, LA	\$3,178	\$142	\$36.59	\$1.00	-5
Soybeans	Council Bluffs, IA	Baton Rouge, LA	\$3,192	\$151	\$36.85	\$1.00	-1
	Minneapolis, MN	Portland, OR	\$4,110	\$674	\$52.73	\$1.44	-6
	Evansville, IN	Raleigh, NC	\$3,204	\$171	\$37.20	\$1.01	6
	Chicago, IL	Raleigh, NC	\$3,804	\$213	\$44.28	\$1.21	5
	Shuttle Train						
Wheat	St. Louis, MO	Houston, TX	\$2,792	\$112	\$32.01	\$0.87	5
	Minneapolis, MN	Portland, OR	\$3,700	\$674	\$48.21	\$1.31	3
Corn	Fremont, NE	Houston, TX	\$2,520	\$408	\$32.27	\$0.82	-1
	Minneapolis, MN	Portland, OR	\$3,528	\$674	\$46.32	\$1.18	4
Soybeans	Council Bluffs, IA	Houston, TX	\$2,787	\$395	\$35.08	\$0.95	-1
	Minneapolis, MN	Portland, OR	\$3,774	\$674	\$49.03	\$1.33	6

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.

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

Table 8

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

Commodity	Origin		Tariff rate/car ¹	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ³
	state	Destination region			metric ton	bushel ²	
Wheat	MT	Chihuahua, CI	\$6,205	\$627	\$69.81	\$1.90	4
	OK	Cuautitlan, EM	\$5,685	\$477	\$62.96	\$1.71	5
	KS	Guadalajara, JA	\$6,155	\$489	\$67.88	\$1.85	5
	TX	Salinas Victoria, NL	\$3,109	\$155	\$33.35	\$0.91	4
Corn	IA	Guadalajara, JA	\$6,570	\$568	\$72.93	\$1.98	-3
	SD	Penjamo, GJ	\$6,440	\$821	\$74.19	\$2.02	-3
	NE	Queretaro, QA	\$6,190	\$461	\$67.96	\$1.85	0
	SD	Salinas Victoria, NL	\$4,570	\$624	\$53.07	\$1.44	-4
	MO	Tlalnepantla, EM	\$5,384	\$449	\$59.60	\$1.62	0
	SD	Torreon, CU	\$5,330	\$687	\$61.48	\$1.67	-3
Soybeans	MO	Bojay (Tula), HG	\$5,994	\$488	\$66.23	\$1.80	-1
	NE	Guadalajara, JA	\$6,375	\$559	\$70.85	\$1.93	-2
	IA	Penjamo (Celaya), GJ	\$6,590	\$815	\$75.67	\$2.06	3
	KS	Torreon, CU	\$5,180	\$368	\$56.68	\$1.54	0
Sorghum	OK	Cuautitlan, EM	\$4,339	\$623	\$50.70	\$1.38	0
	TX	Guadalajara, JA	\$5,150	\$534	\$58.08	\$1.58	6
	NE	Penjamo, GJ	\$6,395	\$511	\$70.57	\$1.92	2
	KS	Queretaro, QA	\$5,488	\$356	\$59.71	\$1.62	0
	NE	Salinas Victoria, NL	\$4,392	\$372	\$48.67	\$1.32	0
	NE	Torreon, CU	\$5,240	\$421	\$57.84	\$1.57	1

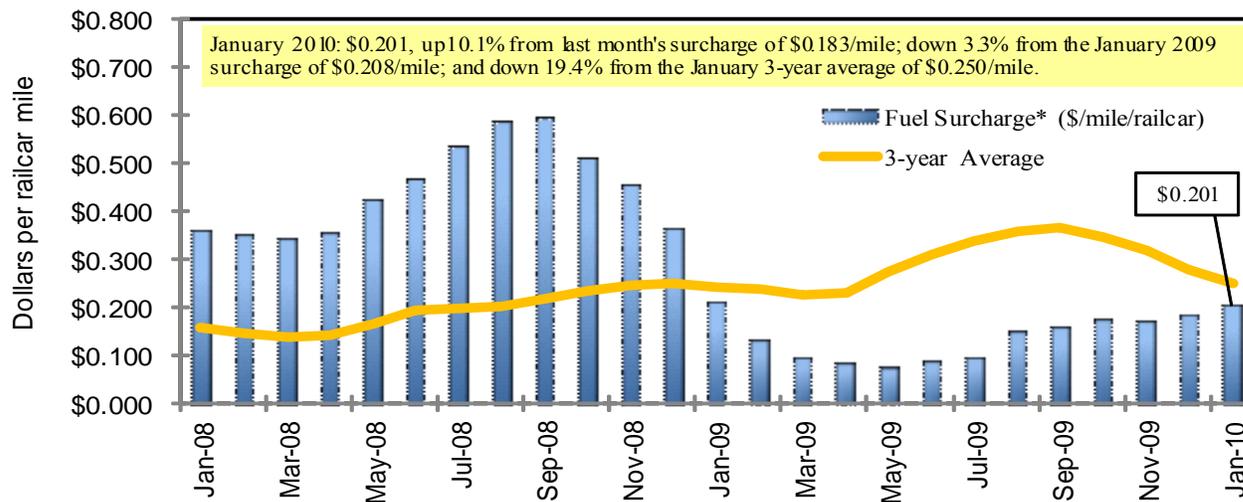
¹Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75--110 cars that meet railroad efficiency requirements.

²Approximate load per car = 97.87 metric tons: Corn & Sorghum 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.uprr.com, www.kcsouthern.com

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹

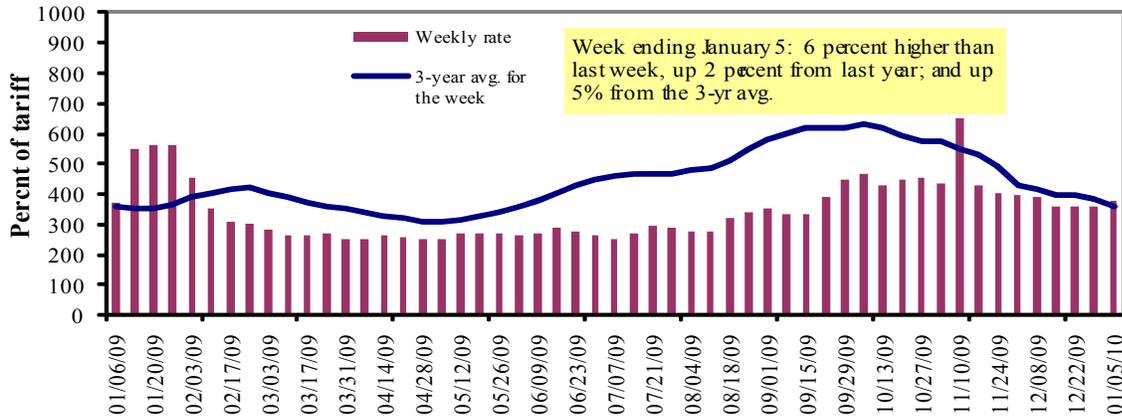
¹ Weighted by each Class I railroad's proportion of grain traffic for the prior year.

* 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.

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	1/5/2010	-	-	380	272	310	310	233
	12/29/2009	-	-	360	278	302	302	242
\$/ton	1/5/2010	-	-	17.63	10.85	14.54	12.52	7.32
	12/29/2009	-	-	16.70	11.09	14.16	12.20	7.60
Current week % change from the same week:								
	Last year	-	-	2	0	-5	-5	-3
	3-year avg. ²	-	-	5	-3	-1	-1	-2
Rate¹	February	-	-	355	272	307	307	235
	April	367	335	317	253	285	285	238

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:

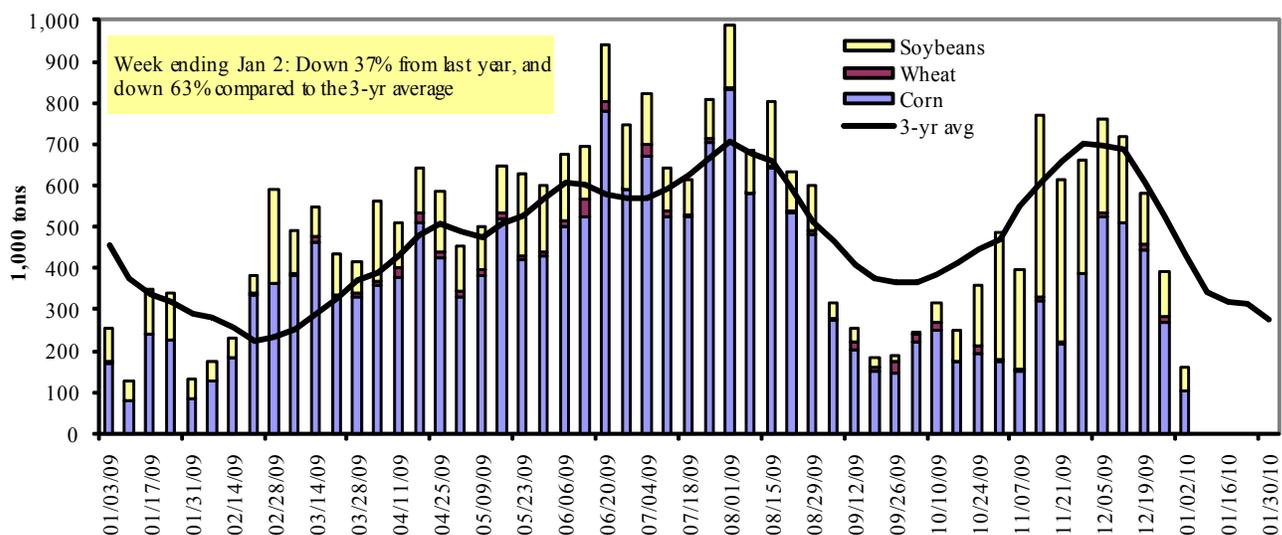
(Index * 1976 tariff benchmark rate per ton)/100

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/webprts/default.asp)

Table 10

Barge Grain Movements (1,000 tons)

Week ending 1/2/2010	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	0	0	3	0	3
Alton, IL (L26)	96	0	38	0	134
Granite City, IL (L27)	104	0	58	0	162
Illinois River (L8)	40	0	31	0	71
Ohio River (L52)	31	10	35	0	76
Arkansas River (L1)	0	3	59	7	69
Weekly total - 2010	136	13	152	7	307
Weekly total - 2009	261	8	190	6	465
2010 YTD ¹	136	13	152	7	307
2009 YTD	261	8	190	6	465
2010 as % of 2009 YTD	52	168	80	109	66
Last 4 weeks as % of 2009 ²	139	117	128	116	134
Total 2009	23,424	1,501	10,465	430	35,819

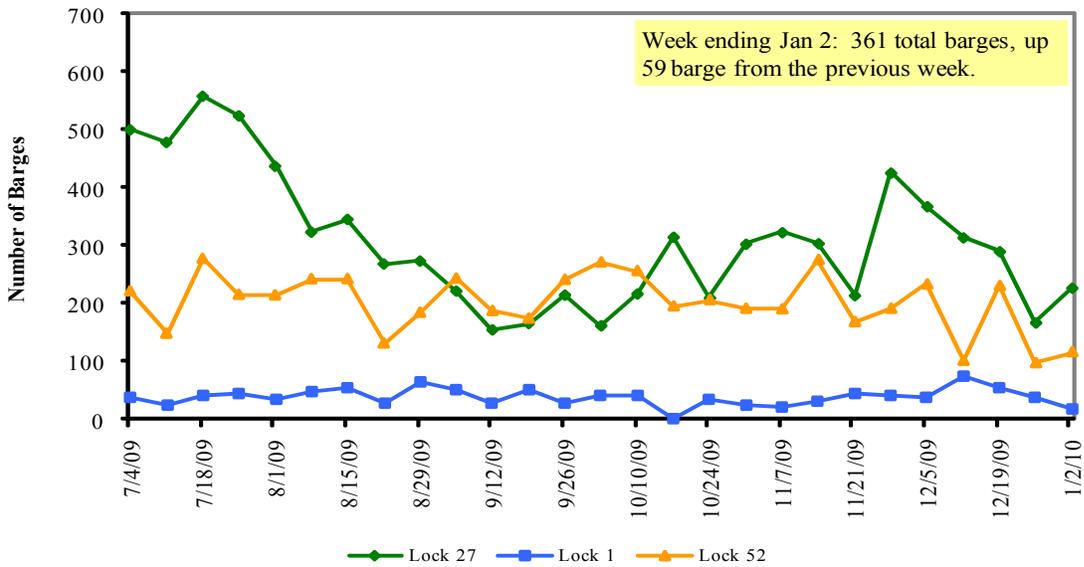
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2009.

Note: Total may not add exactly, due to rounding

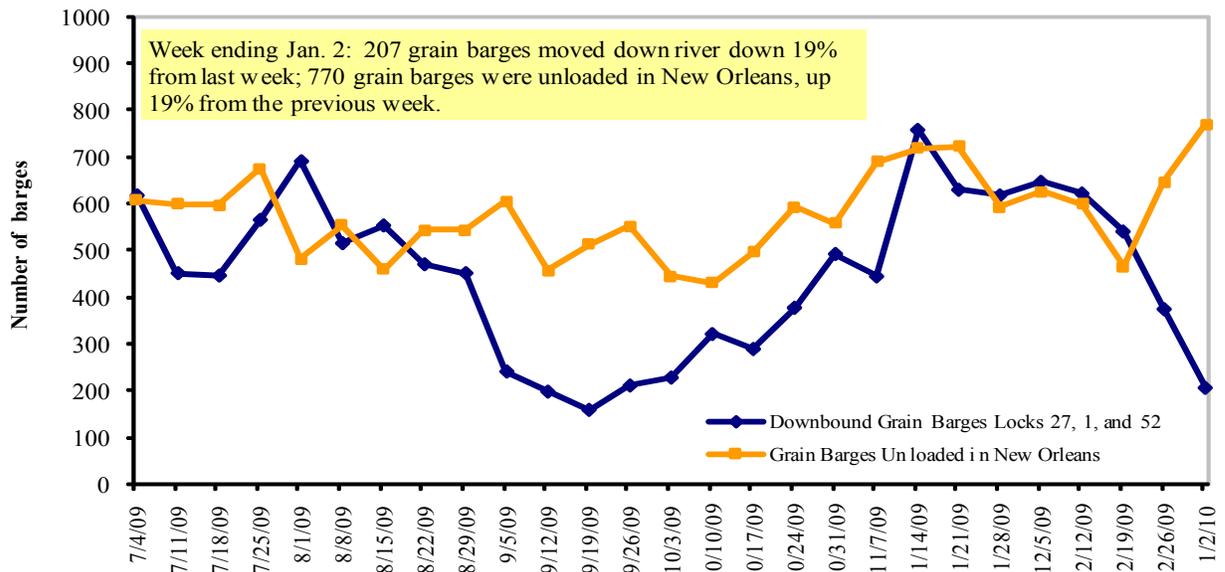
Source: U.S. Army Corps of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webprts/default.asp)

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 1/4/2010 (US\$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.827	0.078	0.447
	New England	2.935	0.073	0.339
	Central Atlantic	2.932	0.075	0.436
	Lower Atlantic	2.772	0.079	0.462
II	Midwest ²	2.771	0.064	0.499
III	Gulf Coast ³	2.750	0.061	0.522
IV	Rocky Mountain	2.746	0.018	0.531
V	West coast C	2.908	0.067	0.633
	California	2.959	0.057	0.720
Total	U.S.	2.797	0.065	0.506

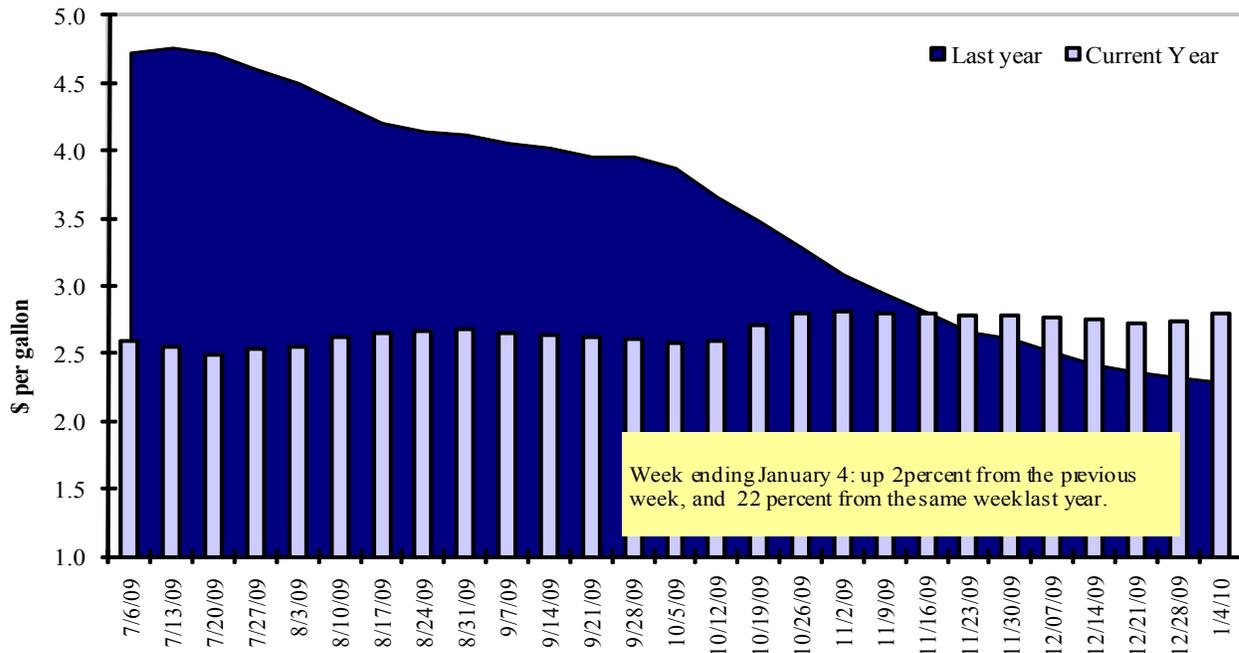
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
12/24/2009	1,406	502	955	724	241	3,828	11,593	12,970	28,391
This week year ago	1,877	956	950	656	91	4,531	8,054	6,851	19,436
Cumulative exports-marketing year²									
2009/10 YTD	4,434	1,762	2,895	2,394	645	12,131	13,420	18,579	44,130
2008/09 YTD	8,210	3,661	3,349	1,738	303	17,261	12,987	13,501	43,749
YTD 2009/10 as % of 2008/09	54	48	86	138	213	70	103	138	101
Last 4 wks as % of same period 2008/09	75	52	101	108	265	84	136	196	145
2008/09 Total	11,244	5,100	5,408	3,420	454	25,626	44,650	33,705	103,981
2007/08 Total	13,709	5,568	7,842	4,191	1,075	32,385	59,666	30,411	122,462

¹ Current unshipped export sales to date

² Shipped export sales to date; 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 12/24/09	Total Commitments ²		% change current MY from last MY	Exports ³ 2008/09
	2009/10 Current MY	2008/09 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	6,724	7,373	(9)	15,910
Mexico	5,088	4,703	8	7,454
Korea	3,268	1,499	118	5,129
Taiwan	1,543	927	66	3,198
Egypt	880	671	31	2,233
Top 5 importers	17,502	15,173	15	33,924
Total US corn export sales	25,013	21,041	19	45,214
% of Projected	48%	45%		
Change from Last Week	773	270		
Top 5 importers' share of U.S. corn export sales	70%	72%		
USDA forecast, December 2009	52,070	47,180	10	
Corn Use for Ethanol USDA forecast, December 2009	106,680	93,396	14	

(n) indicates negative number.

¹Based on FAS 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 14

Top 5 Importers¹ of U.S. Soybeans

Week ending 12/24/09	Total Commitments ²		% change current MY from last MY	Exports ³ 2008/09
	2009/10	2008/09		
	Current MY	Last MY		
	- 1,000 mt -			- 1,000 mt -
China ⁴	19,304	11,427	69	18,681
Mexico	1,426	1,327	7	3,098
Japan 1,	395	1,782	(22)	2,410
EU-25	1,521	1,519	0	2,180
Taiwan	1,079	787	37	1,592
Top 5 importers	24,725	16,841	47	27,961
Total US soybean export sales	31,548	20,352	55	
% of Projected	87%	58%		
Change from last week	799	511		
Top 5 importers' share of U.S. soybean export sales	78%	83%		
USDA forecast, December 2009	36,470	34,930	4	
Soybean Use for Biodiesel USDA forecast, December 2009	5,275	4,566	16	

(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 Release: 378,000 mt on 12/30 to China for 2009/10.

Table 15

Top 10 Importers¹ of All U.S. Wheat

Week Ending 12/24/2009	Total Commitments ²		% change current MY from last MY	Exports ³ 2008/09
	2009/10	2008/09		
	Current MY	Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,175	2,277	(4)	3,103
Nigeria	2,205	2,301	(4)	2,661
Mexico	1,314	2,113	(38)	2,423
Egypt 4	56	1,781	(74)	1,928
Philippines	1,318	1,270	4	1,480
Iraq	300	1,205	(75)	1,205
Korea, South	879	871	1	1,127
Brazil	212	757	(72)	789
Colombia	449	654	(31)	749
Taiwan	574	431	33	714
Top 10 importers	9,880	13,661	(28)	16,179
Total US wheat export sales	15,959	21,792	(27)	27,640
% of Projected	67%	79%		
Change from last week	370	418		
Top 10 importers' share of U.S. wheat export sales	62%	63%		
USDA forecast, December 2009	23,810	27,640	(14)	

(n) indicates negative number.

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

Grain Inspections for Export by U.S. Port Region (1,000 metric tons)

Port regions	Week ending 12/31/09	2009 YTD ¹	2008 YTD ¹	2009 YTD as % of 2008 YTD	Last 4-weeks as % of		Total ¹ 2008
					2008	3-yr. avg.	
Pacific Northwest							
Wheat	103	10,088	10,508	96	133	90	10,508
Corn	149	8,449	12,641	67	90	119	12,641
Soybeans	56	9,613	9,478	101	201	151	9,478
Total	309	28,151	32,626	86	132	119	32,626
Mississippi Gulf							
Wheat	32	3,994	6,321	63	85	77	6,321
Corn	323	28,786	28,497	101	86	68	28,497
Soybeans	717	21,689	16,295	133	146	172	16,295
Total	1,072	54,469	51,113	107	118	114	51,113
Texas Gulf							
Wheat	114	5,688	9,852	58	142	138	9,852
Corn	19	1,965	1,516	130	283	48	1,516
Soybeans	51	2,402	178	1,353	n/a	1,215	178
Total	184	10,055	11,545	87	233	178	11,545
Great Lakes							
Wheat	0	961	831	116	44	33	831
Corn	0	338	294	115	158	68	294
Soybeans	0	765	315	243	166	52	315
Total	0	2,064	1,439	143	91	49	1,439
Atlantic							
Wheat	0	485	891	54	1	1	891
Corn	7	451	576	78	68	37	576
Soybeans	9	1,069	605	177	434	395	605
Total	16	2,005	2,073	97	205	177	2,073
U.S. total from ports²							
Wheat	249	21,216	28,402	75	116	92	28,402
Corn	498	39,989	43,523	92	90	78	43,523
Soybeans	833	35,538	26,871	132	175	184	26,871
Total	1,581	96,743	98,796	98	131	120	98,796

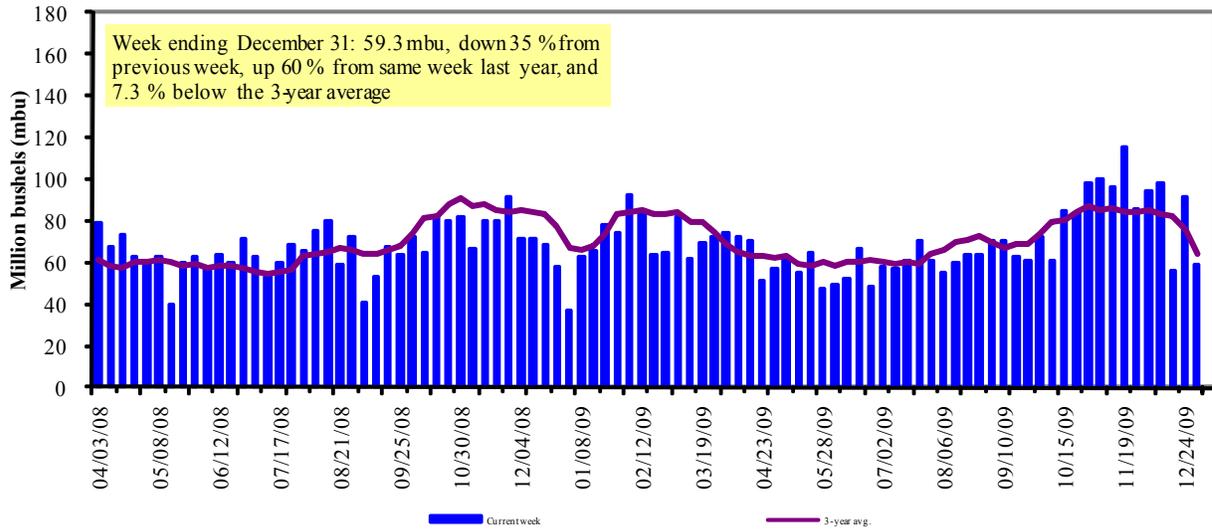
¹ Includes weekly revisions, some regional totals may not add exactly due to rounding.

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

Figure 14

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

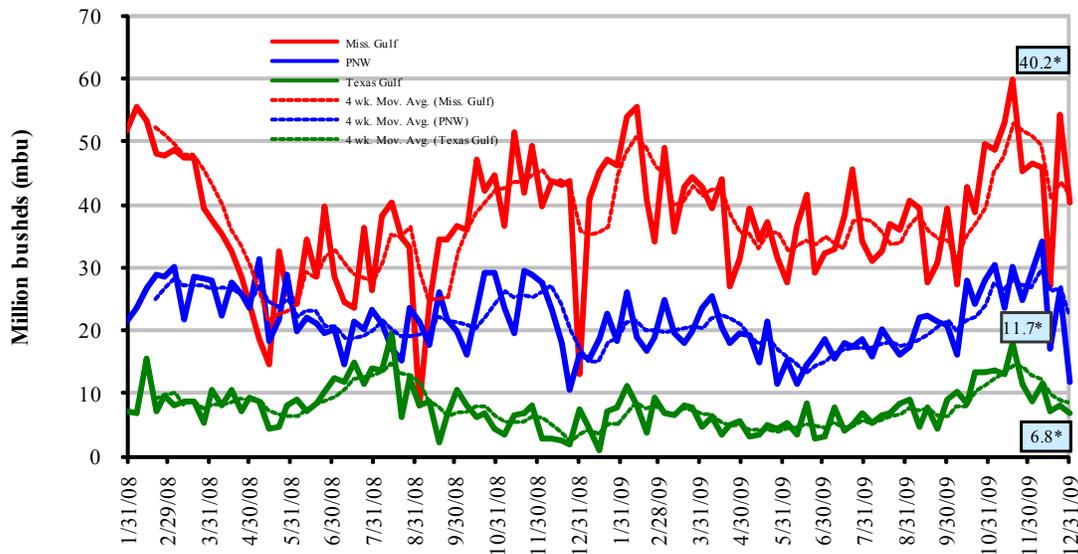


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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); *mbu, this week.

<u>December 31, % change from:</u>	<u>MS Gulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Last week	down 26	down 17	down 25	down 55
Last year (same week)	up 211	down 10	up 130	down 28
3-yr avg. (4-wk mov. avg.)	up 8	up 41	up 12	down 5.4

Ocean Transportation

Table 17

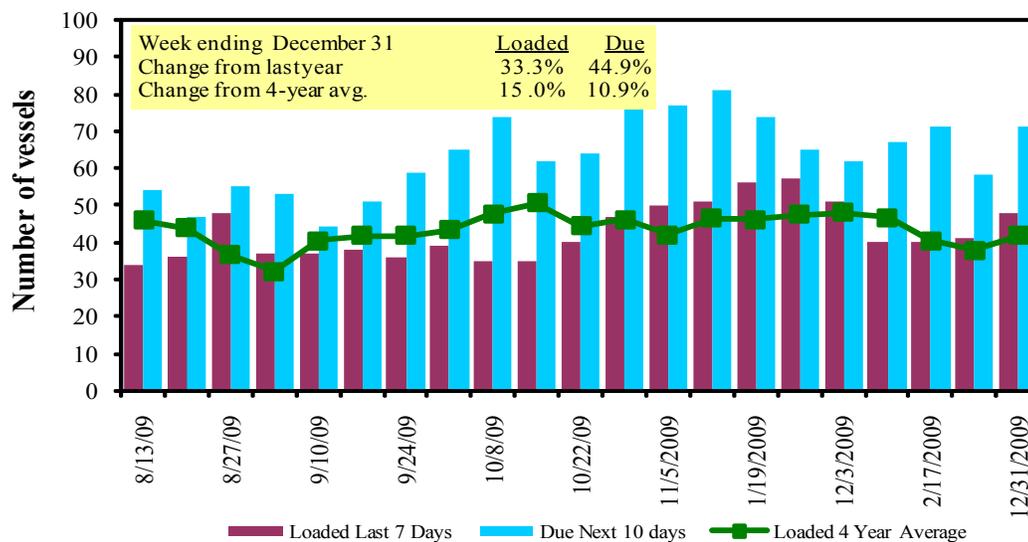
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
12/31/2009	54	48	71	15	n/a
12/24/2009	40	41	58	14	n/a
2008 range	(15..55)	(27..61)	(39..87)	(2..16)	(0..15)
2008 avg	35	42	61	10	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

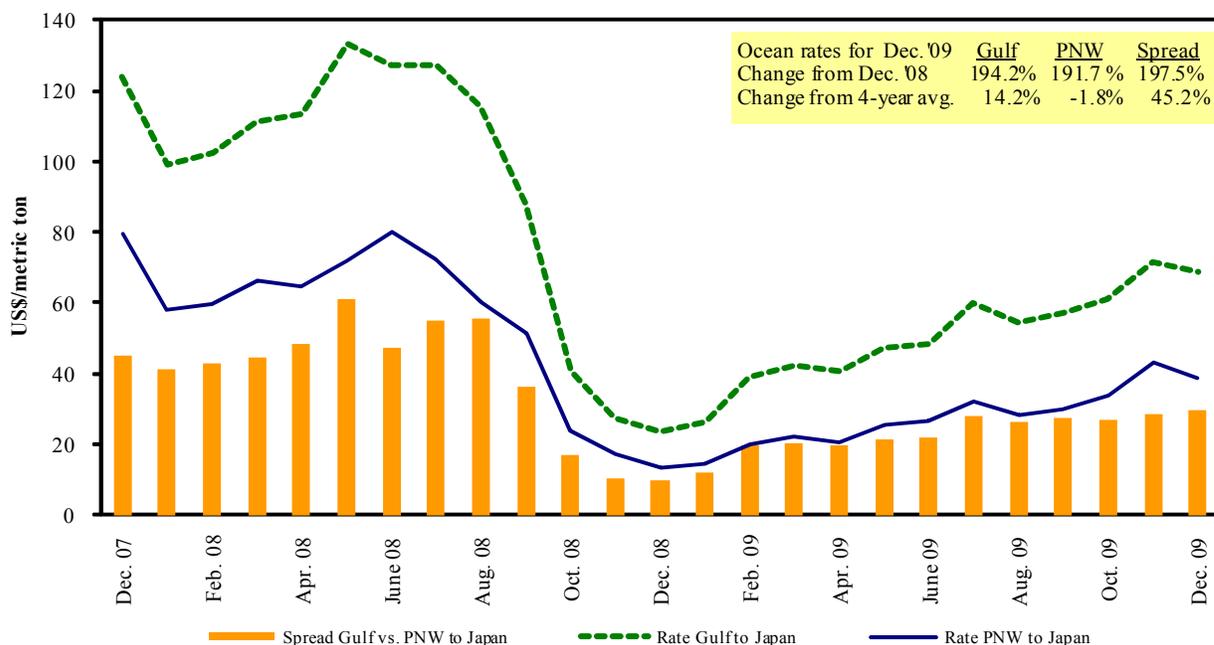


Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 1/2/2010

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Egyptian Mediterranean	Hvy Grain	Jan 7/12	60,000	39.00
U.S. Gulf	Djibouti ¹	Wheat	Jan 1/10	2,770	114.50
U.S. Gulf	China	Hvy Grain	Oct 20/30	55,000	54.00
U.S. Gulf	Morocco	Hvy Grain	Aug 25/Sep 5	25,000	38.00
Brazil	France	Grains	Sep 10/20	20,000	34.00
Brazil	France	Soybeanmeal	Aug 18/28	25,000	34.50
Brazil	Ireland	Grain	Dec 25/30	25,000	43.50
Brazil	Morocco	Corn	Oct 25/Nov 5	25,000	29.00
Ukraine	Kenya	Wheat	Dec 25/30	25,000	52.00
Ukraine	Mediterranean	Wheat	Dec 14/18	30,000	20.00
France	Algeria	Wheat	Nov 5/15	25,000	29.50
France	Algeria	Wheat	Oct 20/30	25,000	27.25
France	Algeria	Wheat	Sep 25/30	25,000	25.50
France	Algeria	Wheat	Sep 1/5	25,000	24.00
River Plate	Continent	Grain	Dec 20/28	25,000	36.50
River Plate	Continent	Grain	Dec 1/10	25,000	48.00
River Plate	Continent	Grain	Nov 25/30	25,000	40.00
River Plate	Poland	Grains	Sep 1/20	24,000	37.25
River Plate	Poland	Soybeanmeal	Sep 5/15	25,000	37.75

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

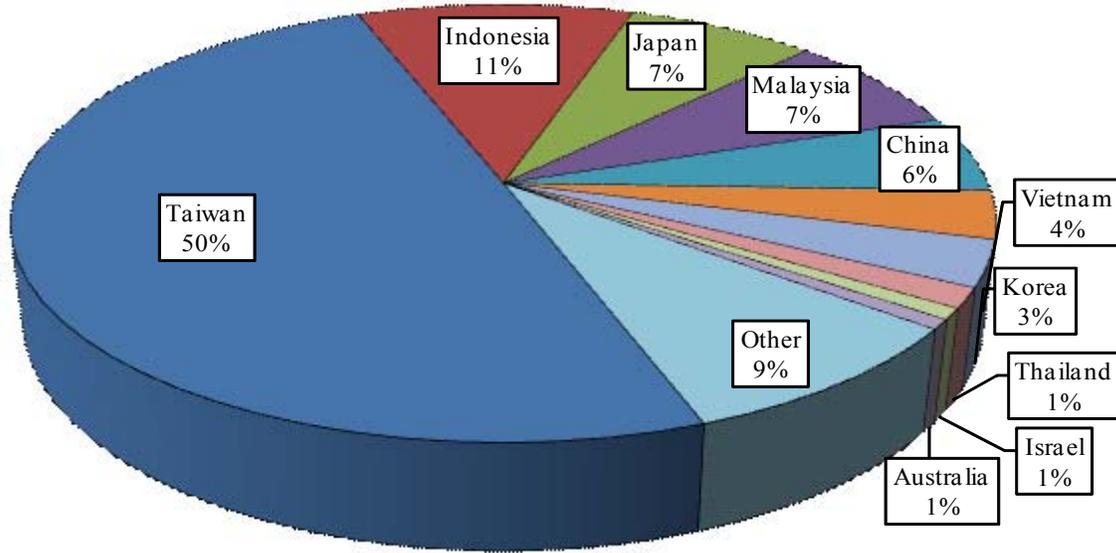
¹75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

During 2008, containers were used to transport 6 percent of total U.S. waterborne grain exports, and 9 percent of U.S. grain exports to Asia.

Figure 18

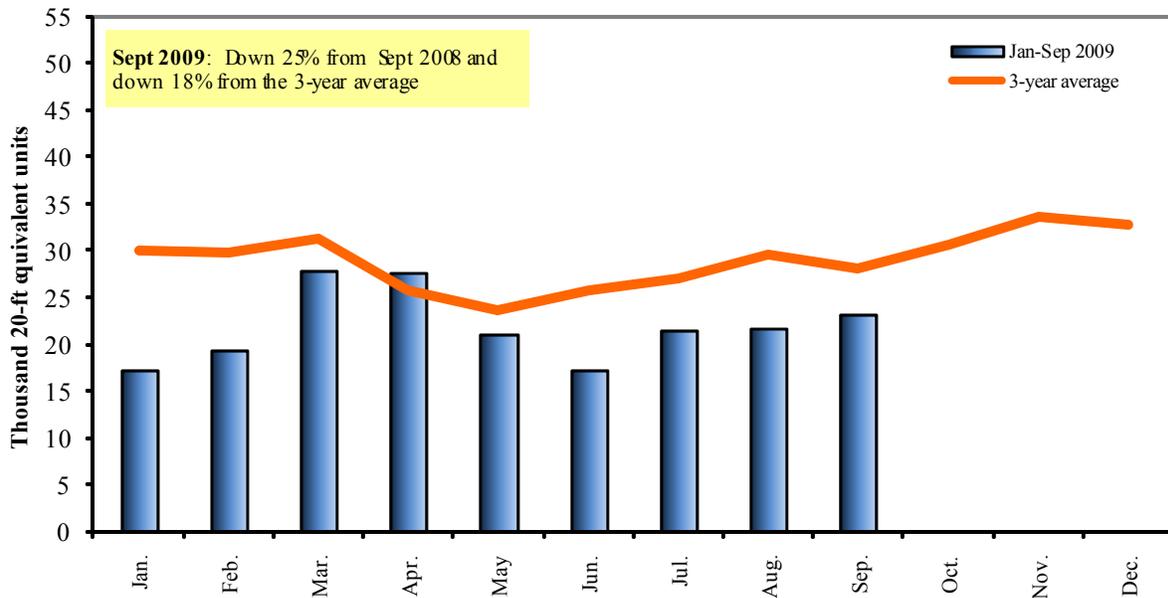
Top 10 Destination Markets for U.S. Containerized Grain Exports, September 2009



Source: Port Import Export Reporting Service (PIERS)

Figure 19

Monthly Shipments of Containerized Grain to Asia



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

Contacts and Links

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