



**WEEKLY HIGHLIGHTS**

April 7, 2011

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**Panama Canal Implements Customer Services Management System**

On April 1, the Panama Canal Authority introduced new measures in an effort to improve services to all its customers. The new processes affect the Customer Services Management System (CSMS), including transit cost estimates, service complaints, customer code, information requests, and the Panama Canal Ship Oil Pollution Emergency Plan. For example, in the context of CSMS, "information requests" applies to historical information of the canal, transit-related statistics, information about the canal or its customers, information about the canal expansion program, and other information not currently available on the Panama Canal web page. Customers are required to complete the required form available through the Canal Web site link to request access to the system.

**March Barge Rates Above Average Due to High Water**

March **barge grain rates** from St. Louis, MO, to New Orleans, LA, were 426 percent of tariff (or \$17.00 per ton), 63 percent higher than the 3-year average. Since the beginning of March, high water has disrupted most phases of barge operations. High water conditions add time and costs to loading barges; river terminals must adapt grain loading operations to the higher water levels. Severe navigation disruptions have already occurred several times this year when barge tows struck highway or rail bridges that span the Mississippi River. The Coast Guard has implemented safety restrictions in some areas to ensure safe navigation. These restrictions include reduced tow sizes and daylight-only traffic. In addition, barge operators reported about a 10 percent fuel cost increase for March that has also increased rates.

**U.S. Corn and Wheat Plantings Up, Soybeans Slightly Down**

On March 31, USDA's Prospective Plantings reported that corn growers intend to plant 92.2 million acres in 2011. If realized, the corn plantings will be the third highest on record, behind 1944, at 95.5 million, and 2007, at 93.5 million. This is 5 percent more than last year and 7 percent higher than 2009. Acreage increases of 250,000 or more are expected in Iowa, Kansas, Nebraska, North Dakota, Ohio, and South Dakota. Soybean planted area for 2011 is estimated at 76.6 million acres, down 1 percent from last year. Wheat planted area is estimated at 58.0 million acres, up 8 percent from last year. The increase in corn and wheat acres could indicate strong demand for transportation services during harvest season.

**Wheat Inspections Remain Above Average**

Although total **grain inspections** receded, inspections of wheat (.783 mmt) increased slightly from the past week, and increased 5 percent above the 4-week running average. Wheat inspections have been above the 4-week running average for the last four weeks. Shipments of wheat, which increased in the Mississippi and Texas Gulf, increased over 100 percent to the Middle East region. Outstanding wheat export sales (see *Table 12 inside the GTR*) also remained strong, up more than 120 percent from last year this time. For the week ending March 31, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.13 million metric tons (mmt), down 12 percent from the previous week but 13 percent above last year this time. Decreased shipments of corn and soybeans caused the drop in total inspections of grain.

**Snapshots by Sector**

**Rail**

U.S. railroads originated 24,048 **carloads of grain** during the week ending March 26, up 3 percent from last week, up 6 percent from last year, and 12 percent higher than the 3-year average.

During the week ending March 31, average April **non-shuttle secondary railcar bids/offers** were \$119 above tariff, down \$31.50 from last week. Average shuttle rates were \$302.50 below tariff, down \$321.50 from last week.

**Ocean**

During the week ending March 31, 51 **ocean-going grain vessels** were loaded in the Gulf, up 16 percent from last year. Fifty vessels are expected to be loaded in the U.S. Gulf within the next 10 days, up 2 percent from last year.

During the week ending April 1, the **cost of shipping grain** from the Gulf to Japan averaged \$58 per mt, down 2 percent from the previous week. The rate from the Pacific Northwest to Japan was \$34 per mt, down 3 percent from the previous week.

**Barge**

During the week ending April 2, **barge grain movements** totaled 690,559 tons, 5 percent higher than the previous week and 30 percent higher than the same period last year.

During the week ending April 2, 437 grain barges **moved down river**, up 5 percent from last week; 497 grain barges were **unloaded in New Orleans**, down 24 percent from the previous week.

**Fuel**

During the week ending April 4, U.S. average **diesel fuel prices** increased 4 cents per gallon to \$3.98—up 1 percent from the previous week and 32 percent higher than the same week last year.

## Railroad Performance Deteriorates As Traffic Rebounds

As the economic recovery continues, measures of railroad performance have deteriorated. Less favorable performance metrics may be due to the economic recovery exceeding expectations for increased transportation demand as well as increased rail traffic. Some railroads are not reinstating train crew members or bringing locomotives and railcars out of storage until rail traffic actually materializes, as opposed to planning for increased demand. In response to a partial recovery of railroad traffic in 2010 (Fig. 1), train speeds dropped to levels below those of 2009, but not as slow as during 2006 and 2007 (Fig. 2). For terminal dwell times, however, partial recovery of traffic resulted in much higher dwell times—similar to and above those experienced during 2006 and 2007, peak traffic years (Fig. 3).

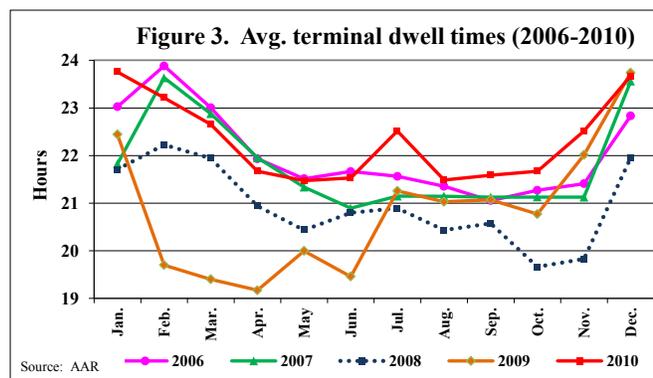
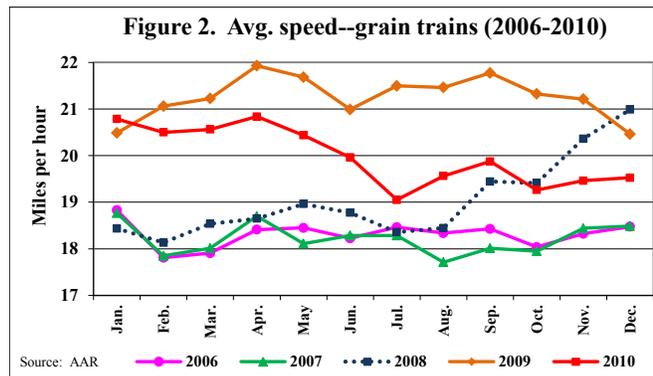
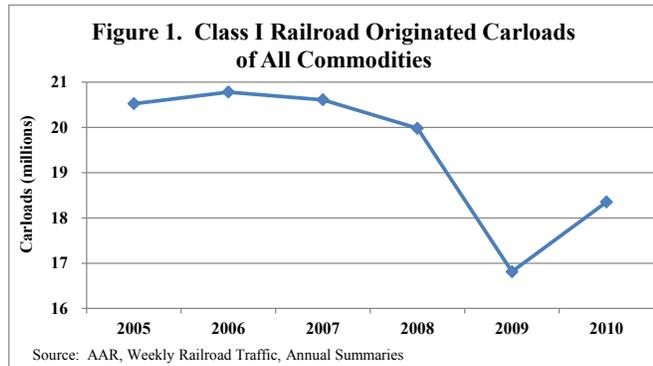
Class I railroads originated 20.78 million carloads during the peak year of 2006 (Fig. 1).<sup>1</sup> After that, carload traffic decreased slowly for 2 years because of decreased construction activity and the beginning of the economic recession in December 2007, to 19.98 million carloads in 2008. As a result of the recession, carloads originated in 2009 fell to only 16.81 million. Carload traffic partially recovered in 2010 with total originations of 18.35 million.

The average speed of grain trains reflects changes in railroad carload traffic. During 2006 and 2007, grain train speed averaged 18.3 and 18.2 miles per hour, respectively (Fig. 2). As the economic recession began to cut into rail traffic, grain train speeds began to increase, starting in September 2008, ending the year at 21 miles per hour. As a result of the recession, grain train speeds averaged 21.3 miles per hour in 2009. As the economic recovery picked up during 2010, average grain train speeds decreased to 20 miles per hour, starting the year at 20.8 miles per hour, but ending at 19.5 miles per hour.

Terminal dwell times show a seasonal pattern, peaking in the late fall and winter months of each year. However, a relationship between terminal dwell times and rail traffic is still apparent. Average terminal dwell times averaged 22.0 hours during the peak traffic year of 2006 and 21.8 hours during 2007. Average dwell times dropped to 20.9 hours in 2008 and to 20.8 hours in 2009. As the economic recovery took hold in 2010, average dwell times increased to 22.3 hours, which is higher than that experienced during the peak traffic year of 2006.

In conclusion, increased rail traffic during 2010 resulted in a deterioration of railroad performance measures. The deterioration of railroad performance measures may be due to the economic recovery exceeding expectations for increased transportation demand as well as increased rail traffic. [Marvin.Prater@ams.usda.gov](mailto:Marvin.Prater@ams.usda.gov)

<sup>1</sup> Class I railroads include BNSF Railway, Canadian National, Canadian Pacific, CSX Transportation, Kansas City Southern Railway, Norfolk Southern, and Union Pacific Railroad.



# Grain Transportation Indicators

Table 1  
**Grain Transport Cost Indicators<sup>1</sup>**

Week ending	Truck	Rail <sup>2</sup>	Barge	Ocean	
				Gulf	Pacific
04/06/11	267	214	262	259	241
03/30/11	264	246	282	264	248

<sup>1</sup>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)

<sup>2</sup>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)**

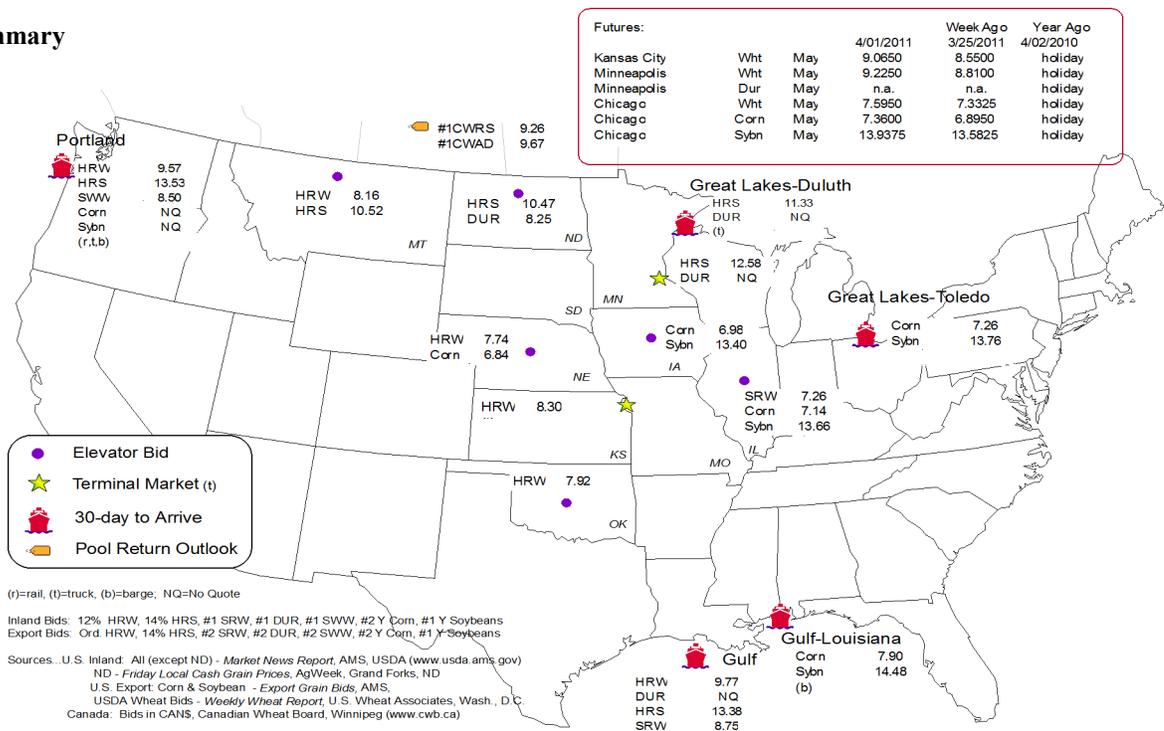
Commodity	Origin--Destination	4/2/2011	3/25/2011
Corn	IL--Gulf	-0.76	-0.77
Corn	NE--Gulf	-1.06	-1.05
Soybean	IA--Gulf	-1.08	-1.26
HRW	KS--Gulf	-1.47	-1.49
HRS	ND--Portland	-3.06	-3.80

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)<sup>1</sup>

Week ending	Mississippi		Cross-Border	Pacific	Atlantic &	Total
	Gulf	Texas Gulf	Mexico	Northwest	East Gulf	
3/30/2011 <sup>p</sup>	1,282	2,091	1,318	4,811	727	10,229
3/23/2011 <sup>r</sup>	1,706	2,367	881	4,731	837	10,522
2011 YTD	14,827	28,833	8,811	51,990	9,879	114,340
2010YTD	5,986	20,684	11,393	44,343	13,924	96,330
2011 YTD as % of 2010 YTD	248	139	77	117	71	119
Last 4 weeks as % of 2010 <sup>2</sup>	357	141	96	119	89	129
Last 4 weeks as % of 4-year avg. <sup>2</sup>	153	143	115	95	101	113
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

<sup>1</sup> Data is incomplete as it is voluntarily provided

<sup>2</sup> Compared with same 4-weeks in 2010 and prior 4-year average.

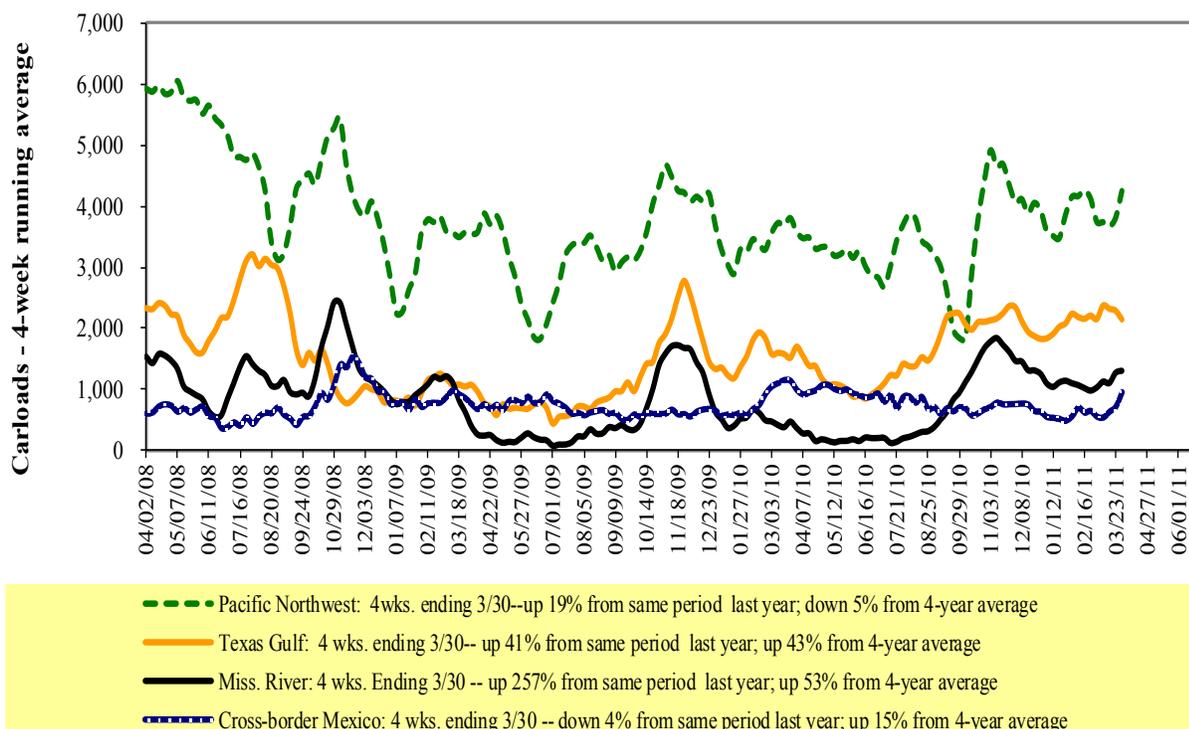
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 2

## Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

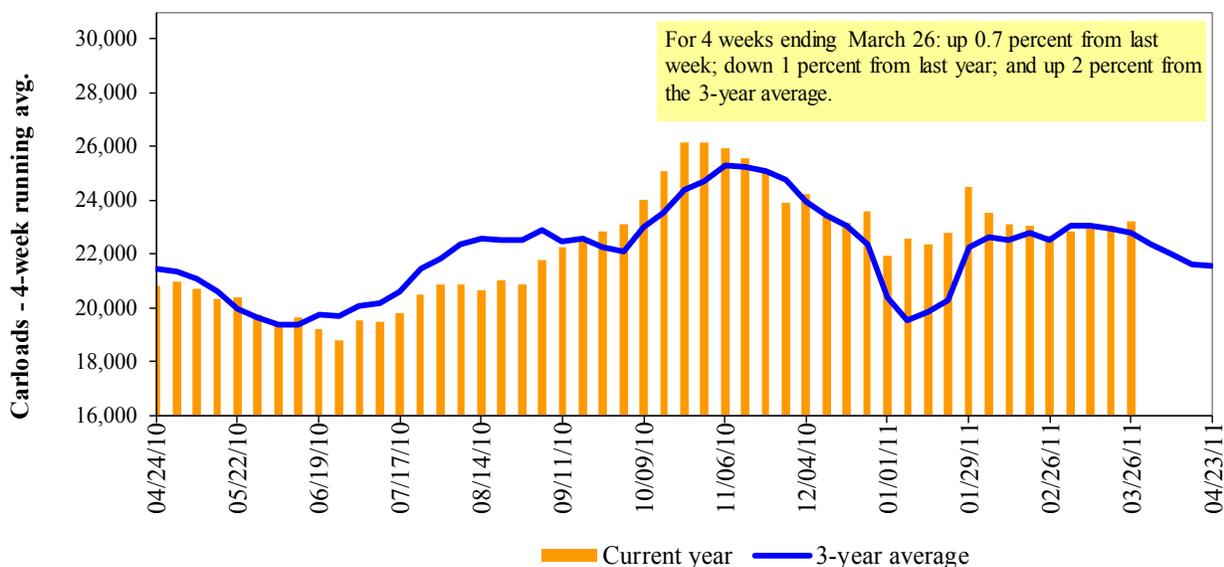
Table 4

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

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
03/26/11	2,138	3,648	11,609	613	6,040	24,048	4,162	5,025
This week last year	2,356	2,993	11,020	904	5,527	22,800	4,194	5,270
2011 YTD	25,966	36,381	137,348	7,009	74,813	281,517	46,957	54,329
2010 YTD	28,572	36,573	131,114	9,439	67,166	272,864	49,654	62,979
2011 YTD as % of 2010 YTD	91	99	105	74	111	103	95	86
Last 4 weeks as % of 2010 <sup>1</sup>	87	98	98	71	110	99	99	79
Last 4 weeks as % of 3-yr avg.	85	110	103	76	108	102	98	83
Total 2010	111,935	159,836	546,901	35,807	295,361	1,149,840	203,038	265,835

<sup>1</sup>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<sup>1</sup> (\$/car)<sup>2</sup>**

Week ending	Delivery period							
	Apr-11	Apr-10	May-11	May-10	Jun-11	Jun-10	Jul-11	Jul-10
3/31/2011								
BNSF <sup>3</sup>								
COT grain units	no offer	no bids	no offer	0	3	0	9	no bids
COT grain single-car <sup>5</sup>	no offer	0 . . 10	no offer	0 . . 5	27 . . 70	0	27 . . 70	no bids
UP <sup>4</sup>								
GCAS/Region 1	1	no bids	no bids	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	no bids	n/a	n/a

<sup>1</sup>Auction offerings are for single-car and unit train shipments only.

<sup>2</sup>Average premium/discount to tariff, last auction

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

<sup>4</sup>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.

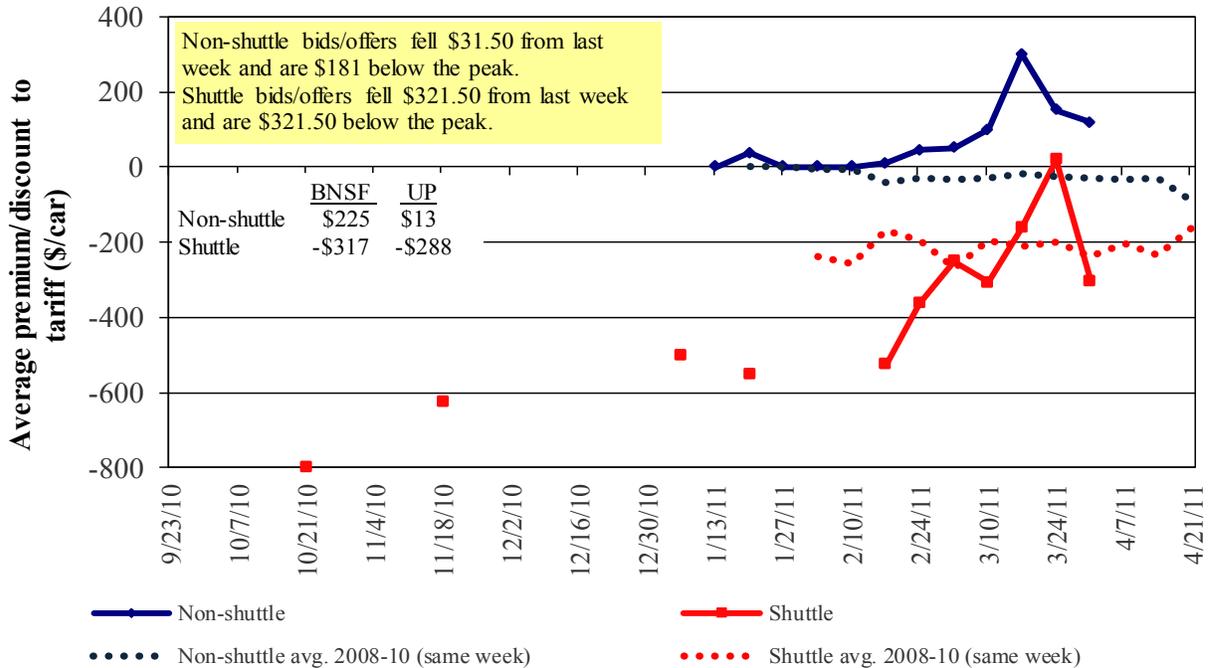
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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 April 2011, Secondary Market**

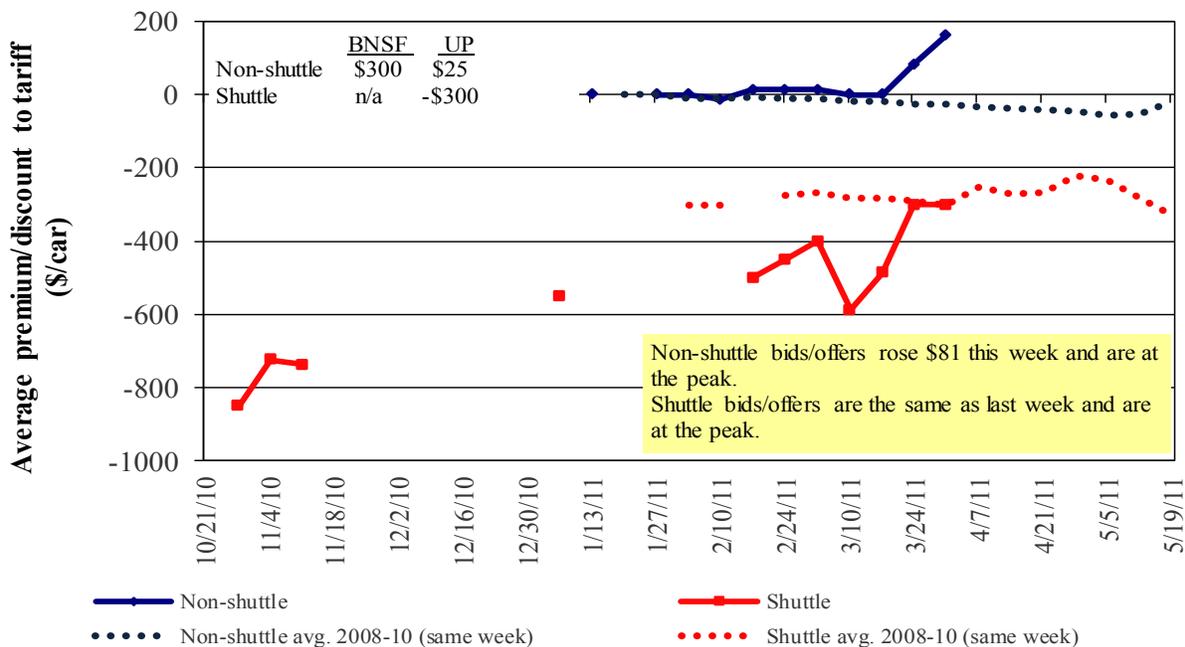


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

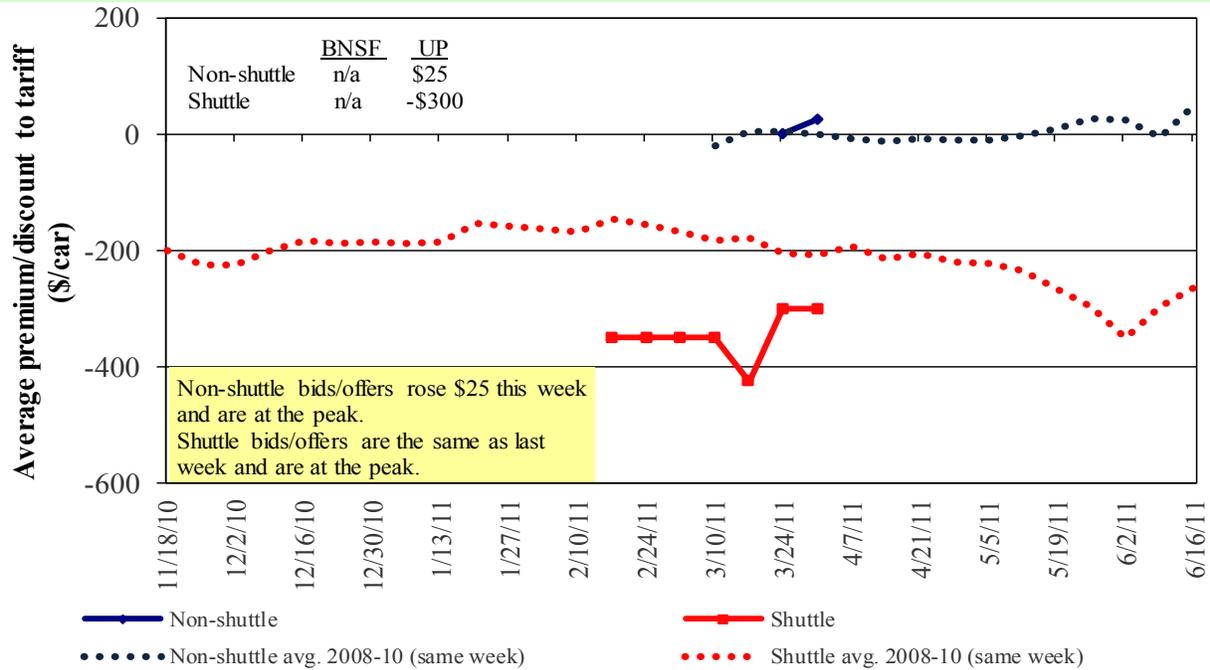


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

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



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 6

### Weekly Secondary Rail Car Market (\$/car)<sup>1</sup>

Week ending	Delivery period					
	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11
<b>3/31/2011</b>						
<b>Non-shuttle</b>						
BNSF-GF	225	300	n/a	n/a	n/a	n/a
Change from last week	(63)	137	n/a	n/a	n/a	n/a
Change from same week 2010	238	310	n/a	n/a	n/a	n/a
UP-Pool	13	25	25	n/a	n/a	n/a
Change from last week	-	25	25	n/a	n/a	n/a
Change from same week 2010	43	43	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	(317)	n/a	n/a	n/a	n/a	n/a
Change from last week	(405)	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	17	n/a	n/a	n/a	n/a	n/a
UP-Pool	(288)	(300)	(300)	(250)	(250)	(150)
Change from last week	(238)	-	-	(50)	(50)	-
Change from same week 2010	(188)	n/a	n/a	n/a	n/a	n/a

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

<sup>2</sup> 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<sup>1</sup>**

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

<sup>1</sup>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.

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

<sup>3</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

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

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

Table 8

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

Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel surcharge per car <sup>2</sup>	Tariff plus surcharge per:		Percent change Y/Y <sup>4</sup>
					metric ton <sup>3</sup>	bushel <sup>3</sup>	
Wheat	MT	Chihuahua, CI	\$6,854	\$450	\$74.63	\$2.03	5
	OK	Cuautitlan, EM	\$6,191	\$480	\$68.16	\$1.85	7
	KS	Guadalajara, JA	\$6,825	\$737	\$77.27	\$2.10	8
	TX	Salinas Victoria, NL	\$3,237	\$193	\$35.04	\$0.95	4
Corn	IA	Guadalajara, JA	\$7,310	\$737	\$82.23	\$2.09	9
	SD	Penjamo, GJ	\$7,000	\$589	\$77.54	\$1.97	4
	NE	Queretaro, QA	\$6,495	\$627	\$72.77	\$1.85	8
	SD	Salinas Victoria, NL	\$5,290	\$448	\$58.63	\$1.49	10
	MO	Tlalnepantla, EM	\$5,669	\$611	\$64.17	\$1.63	9
	SD	Torreon, CU	\$6,060	\$493	\$66.96	\$1.70	8
Soybeans	MO	Bojay (Tula), HG	\$6,368	\$636	\$71.57	\$1.95	5
	NE	Guadalajara, JA	\$7,200	\$724	\$80.97	\$2.20	9
	IA	El Castillo, JA <sup>5</sup>	\$7,390	\$585	\$81.49	\$2.22	7
	KS	Torreon, CU	\$5,790	\$493	\$64.20	\$1.75	10
Sorghum	OK	Cuautitlan, EM	\$5,220	\$447	\$57.90	\$1.47	14
	TX	Guadalajara, JA	\$6,020	\$383	\$65.43	\$1.66	6
	NE	Penjamo, GJ	\$6,575	\$664	\$73.96	\$1.88	2
	KS	Queretaro, QA	\$5,895	\$429	\$64.61	\$1.64	10
	NE	Salinas Victoria, NL	\$4,725	\$406	\$52.43	\$1.33	10
	NE	Torreon, CU	\$5,710	\$528	\$63.73	\$1.62	8

<sup>1</sup>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.

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

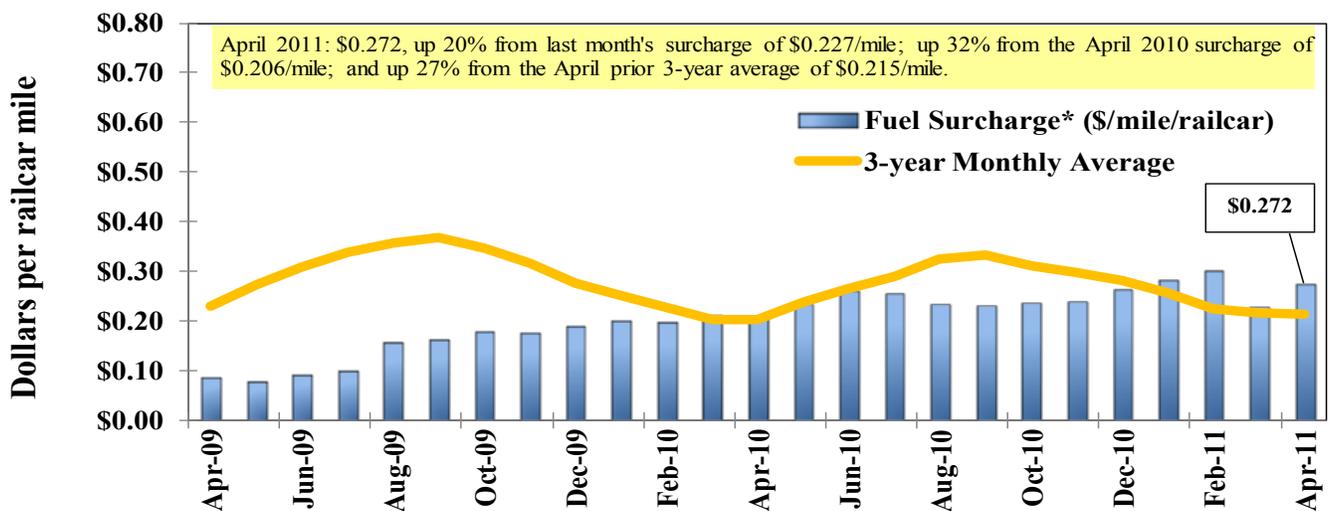
<sup>3</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

<sup>4</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

<sup>5</sup>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<sup>1</sup>**

<sup>1</sup>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.

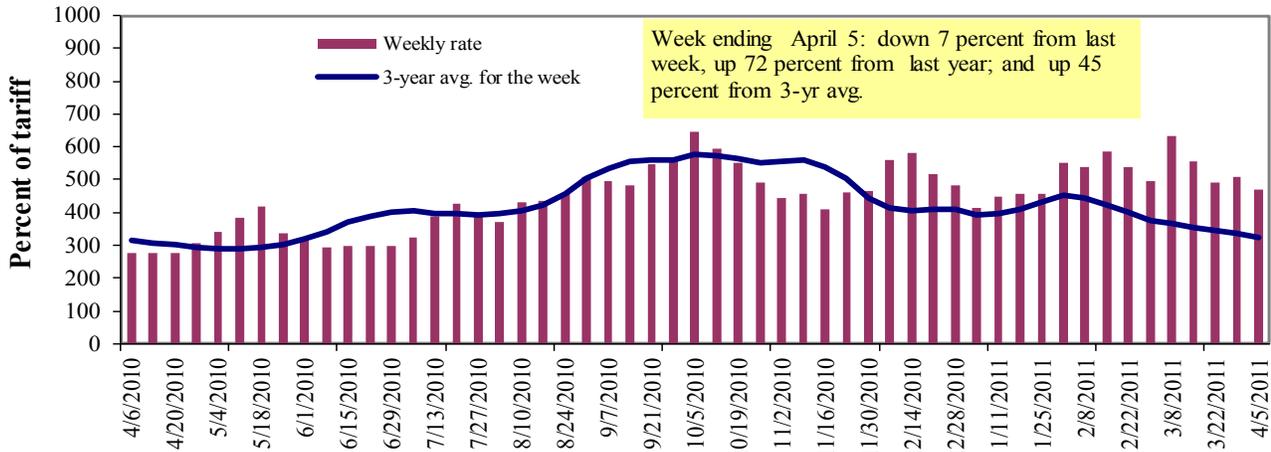
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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<sup>1,2</sup>



<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

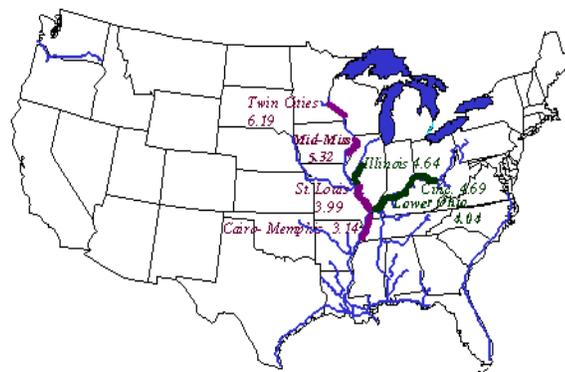
### Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
<b>Rate<sup>1</sup></b>	4/5/2011	-	467	472	363	488	488	333
	3/29/2011	-	512	507	383	457	457	332
<b>\$/ton</b>	4/5/2011	-	24.84	21.90	14.48	22.89	19.72	10.46
	3/29/2011	-	27.24	23.52	15.28	21.43	18.46	10.42
<b>Current week % change from the same week:</b>								
	Last year	-	57	72	83	112	112	85
	3-year avg. <sup>2</sup>	-	10	45	45	73	73	46
<b>Rate<sup>1</sup></b>	May	540	467	467	367	453	453	328
	July	537	472	472	363	467	467	350

<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average; ton = 2,000 pounds.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9  
Benchmark tariff rates



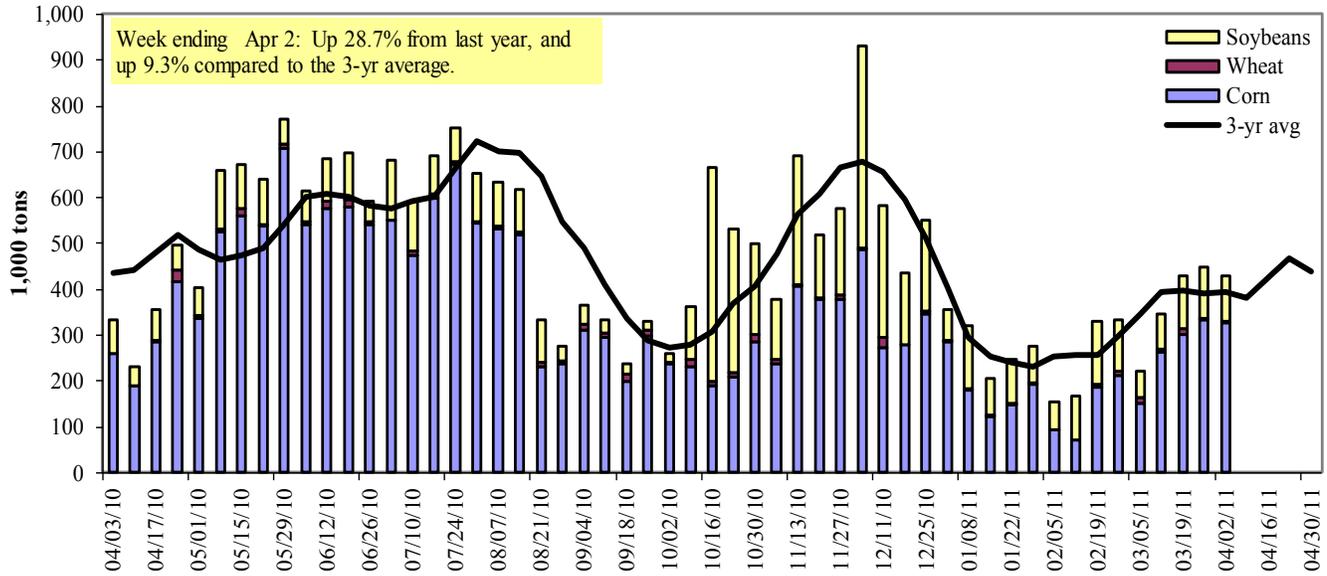
### Calculating barge rate per ton:

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

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

Figure 10

**Barge Movements on the Mississippi River<sup>1</sup> (Locks 27 - Granite City, IL)**



<sup>1</sup> The 3-year average is a 4-week moving average.

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

Table 10

**Barge Grain Movements (1,000 tons)**

Week ending 4/2/2011	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	62	0	15	0	77
Winfield, MO (L25)	129	3	65	0	197
Alton, IL (L26)	306	6	81	0	393
Granite City, IL (L27)	326	6	98	0	431
<b>Illinois River (L8)</b>	111	5	27	0	143
<b>Ohio River (L52)</b>	133	14	38	2	186
<b>Arkansas River (L1)</b>	1	28	33	11	73
Weekly total - 2011	460	48	169	13	691
Weekly total - 2010	364	19	144	6	533
2011 YTD <sup>1</sup>	4,305	276	2,734	95	7,410
2010 YTD	4,539	250	2,809	119	7,716
2011 as % of 2010 YTD	95	111	97	80	96
Last 4 weeks as % of 2010 <sup>2</sup>	100	173	111	113	105
<b>Total 2010</b>	<b>22,768</b>	<b>1,220</b>	<b>10,373</b>	<b>481</b>	<b>34,841</b>

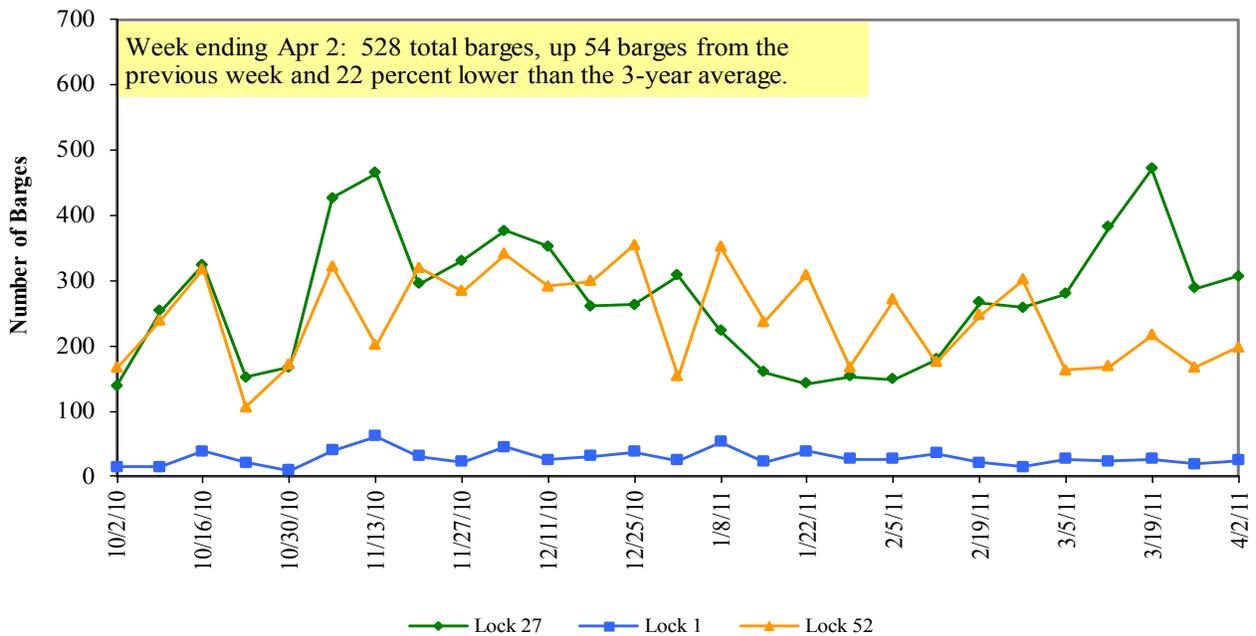
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

<sup>2</sup> As a percent of same period in 2010.

Note: Total may not add exactly, due to rounding

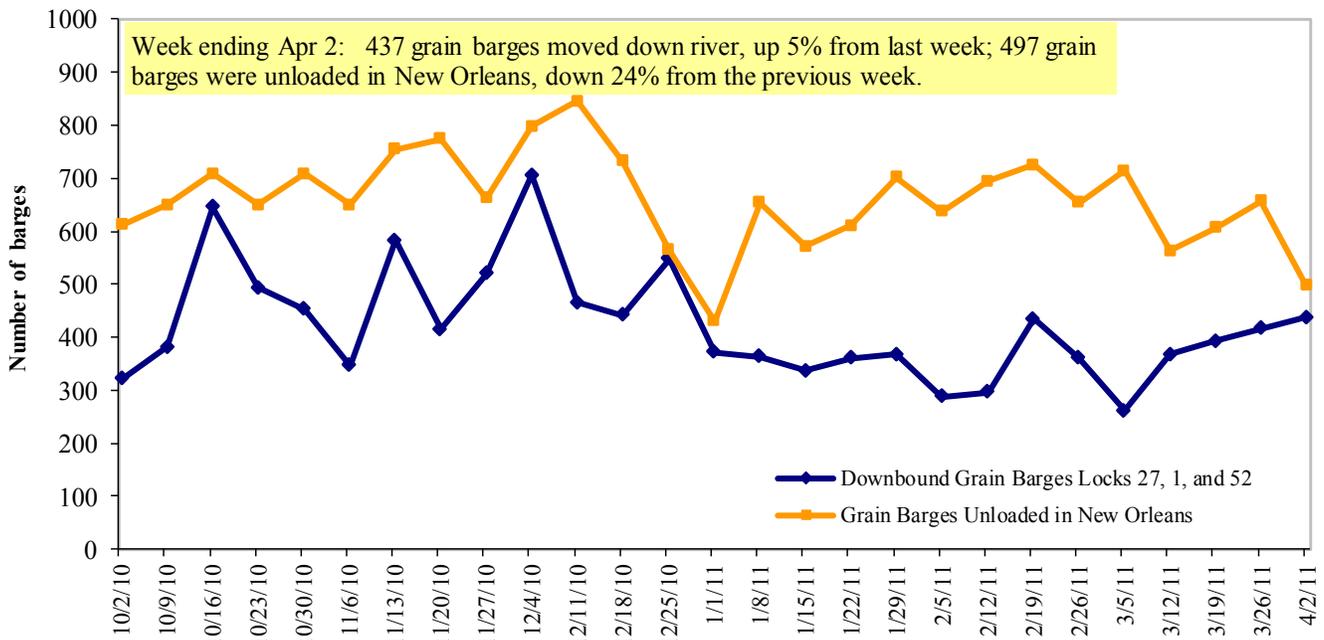
Source: U.S. Army Corps of Engineers ([www.mvr.usace.army.mil/mvrmi/omni/webprts/default.asp](http://www.mvr.usace.army.mil/mvrmi/omni/webprts/default.asp))

**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 Prices<sup>1</sup>, Week Ending 4/4/2011 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.982	0.030	0.950
	New England	4.109	0.014	1.055
	Central Atlantic	4.092	0.031	0.956
	Lower Atlantic	3.923	0.031	0.937
II	Midwest <sup>2</sup>	3.932	0.049	0.943
III	Gulf Coast <sup>3</sup>	3.905	0.048	0.927
IV	Rocky Mountain	4.017	0.058	0.973
V	West Coast	4.209	0.054	1.096
	California	4.323	0.067	1.176
Total	U.S.	3.976	0.044	0.961

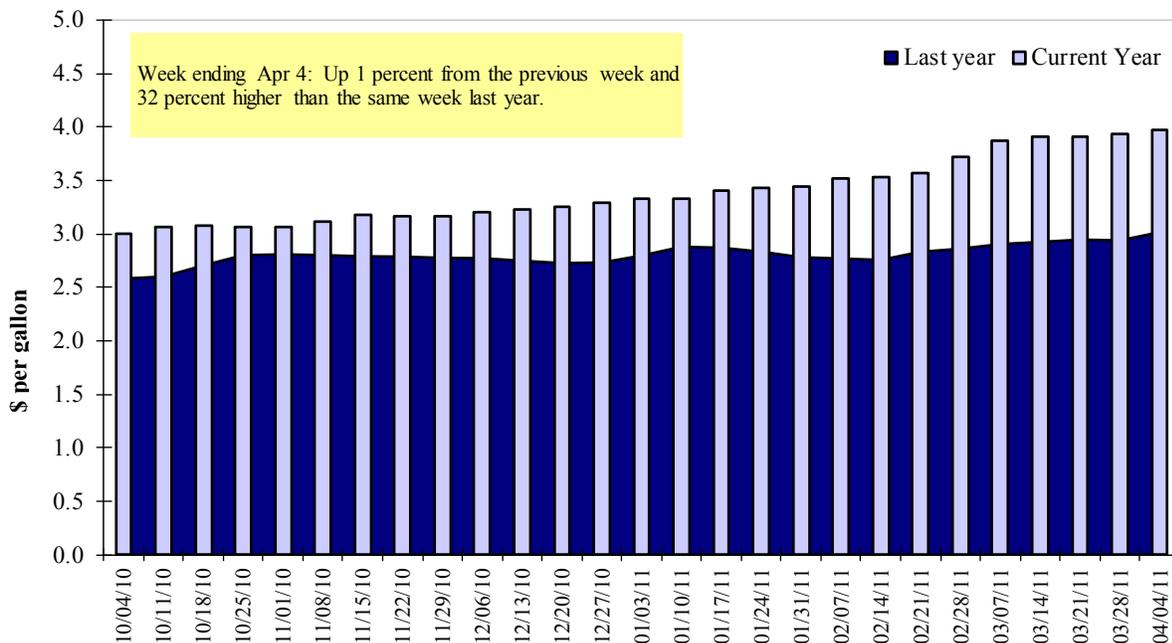
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<sup>2</sup>Same as North Central <sup>3</sup>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)

Week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
<b>Export Balances<sup>1</sup></b>									
3/24/2011	3,558	833	2,116	1,256	140	7,903	13,857	6,139	27,899
This week year ago	1,268	477	977	685	155	3,562	9,327	2,691	15,580
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2010/11 YTD	12,372	1,948	6,668	3,726	768	25,480	24,436	34,227	84,143
2009/10 YTD	6,881	2,309	4,282	3,243	831	17,546	25,170	33,630	76,346
YTD 2010/11 as % of 2009/10	180	84	156	115	92	145	97	102	110
Last 4 wks as % of same period 2009/10	295	183	238	188	86	235	141	264	184
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

<sup>1</sup> Current unshipped export sales to date

<sup>2</sup> Shipped export sales to date; the new marketing year now in effect for corn and soybeans

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

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

Table 13

## Top 5 Importers<sup>1</sup> of U.S. Corn

Week ending 03/24/11	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2009/10
	2010/11 Current MY	2009/10 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	11,050	9,769	13	14,343
Mexico	6,251	6,633	(6)	7,999
Korea	4,190	5,094	(18)	7,562
Taiwan	2,015	2,423	(17)	2,949
Egypt	2,466	1,383	78	2,935
<b>Top 5 importers</b>	<b>25,971</b>	<b>25,302</b>	<b>3</b>	<b>35,788</b>
<b>Total US corn export sales</b>	<b>38,293</b>	<b>34,497</b>	<b>11</b>	<b>50,460</b>
% of Projected	77%	68%		
Change from Last Week	1,915	807		
<b>Top 5 importers' share of U.S. corn export sales</b>	68%	73%		
<b>USDA forecast, March 2011</b>	<b>49,530</b>	<b>50,460</b>	<b>(2)</b>	
<b>Corn Use for Ethanol USDA forecast, Ethanol March 2011</b>	<b>125,730</b>	<b>116,027</b>	<b>8</b>	

(n) indicates negative number.

<sup>1</sup> Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

<sup>2</sup> Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.

<sup>3</sup> FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm.

Table 14

**Top 5 Importers<sup>1</sup> of U.S. Soybeans**

Week ending 03/24/11	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2009/10
	2010/11 Current MY	2009/10 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	25,153	21,716	16	22,454
Mexico	2,495	2,359	6	3,276
Japan	1,892	1,896	(0.2)	2,347
EU-25	2,599	2,667	(3)	2,647
Taiwan	1,181	1,331	(11)	1,556
<b>Top 5 importers</b>	<b>33,318</b>	<b>29,969</b>	<b>11</b>	<b>32,280</b>
<b>Total US soybean export sales</b>	<b>40,367</b>	<b>36,321</b>	<b>11</b>	<b>40,850</b>
% of Projected	93%	89%		
Change from last week	145	123		
<b>Top 5 importers' share of U.S. soybean export sales</b>	83%	83%		
<b>USDA forecast, March 2011</b>	<b>43,270</b>	<b>40,850</b>	<b>6</b>	
<b>Soybean Use for Biodiesel USDA forecast, March 2011</b>	<b>6,474</b>	<b>4,076</b>	<b>59</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS 2008/09 Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.<sup>3</sup>FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm.

Table 15

**Top 10 Importers<sup>1</sup> of All U.S. Wheat**

Week Ending 03/24/2011	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2009/10
	2010/11 Current MY	2009/10 Last MY		
	- 1,000 mt -			- 1,000 mt -
Nigeria	3,358	3,281	2	3,233
Japan	3,523	2,971	19	3,148
Mexico	2,593	1,852	40	1,975
Philippines	1,872	1,613	16	1,518
Korea, South	1,616	1,151	40	1,111
Taiwan	872	759	15	844
Venezuela	586	669	(12)	658
Colombia	804	520	55	575
Peru	960	484	98	567
Egypt	3,749	456	723	529
<b>Top 10 importers</b>	<b>19,934</b>	<b>13,757</b>	<b>45</b>	<b>14,156</b>
<b>Total US wheat export sales</b>	<b>33,383</b>	<b>21,108</b>	<b>58</b>	<b>23,980</b>
% of Projected	96%	88%		
Change from last week	272	431		
<b>Top 10 importers' share of U.S. wheat export sales</b>	60%	65%		
<b>USDA forecast, March 2011</b>	<b>34,700</b>	<b>23,980</b>	<b>45</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS 2008/09 Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.<sup>3</sup>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 03/31/11	Previous Week <sup>1</sup>	Current Week as % of Previous	2011 YTD <sup>1</sup>	2010 YTD <sup>1</sup>	2011 YTD as % of 2010 YTD	Last 4-weeks as % of		Total <sup>1</sup> 2010
							2010	3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	206	373	55	3,253	2,346	139	166	138	11,062
Corn	207	174	119	1,874	1,949	96	92	75	9,950
Soybeans	189	174	109	2,587	3,489	74	62	81	10,191
<b>Total</b>	<b>602</b>	<b>721</b>	<b>84</b>	<b>7,715</b>	<b>7,785</b>	<b>99</b>	<b>97</b>	<b>96</b>	<b>31,203</b>
<b>Mississippi Gulf</b>									
Wheat	119	110	108	1,371	870	158	159	130	4,199
Corn	572	702	82	6,767	6,648	102	89	91	29,794
Soybeans	323	508	64	8,181	7,289	112	127	134	22,519
<b>Total</b>	<b>1,015</b>	<b>1,320</b>	<b>77</b>	<b>16,319</b>	<b>14,807</b>	<b>110</b>	<b>107</b>	<b>108</b>	<b>56,512</b>
<b>Texas Gulf</b>									
Wheat	401	294	136	3,814	1,970	194	175	210	9,339
Corn	32	75	42	391	526	74	115	108	1,859
Soybeans	0	0	n/a	760	647	118	n/a	352	1,916
<b>Total</b>	<b>433</b>	<b>370</b>	<b>117</b>	<b>4,965</b>	<b>3,142</b>	<b>158</b>	<b>177</b>	<b>194</b>	<b>13,115</b>
<b>Great Lakes</b>									
Wheat	2	0	n/a	16	5	333	n/a	76	1,897
Corn	0	0	n/a	0	0	n/a	n/a	n/a	119
Soybeans	0	0	n/a	0	0	n/a	n/a	0	655
<b>Total</b>	<b>2</b>	<b>0</b>	<b>n/a</b>	<b>16</b>	<b>5</b>	<b>333</b>	<b>n/a</b>	<b>70</b>	<b>2,672</b>
<b>Atlantic</b>									
Wheat	52	1	7,119	327	49	673	205	88	343
Corn	4	0	n/a	79	98	80	92	66	469
Soybeans	24	4	574	346	611	57	52	99	1,417
<b>Total</b>	<b>80</b>	<b>5</b>	<b>1,642</b>	<b>751</b>	<b>758</b>	<b>99</b>	<b>80</b>	<b>88</b>	<b>2,229</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	781	778	100	8,781	5,240	168	169	158	26,839
Corn	815	951	86	9,112	9,221	99	91	88	42,192
Soybeans	536	686	78	11,874	12,036	99	101	117	36,699
<b>Total</b>	<b>2,132</b>	<b>2,415</b>	<b>88</b>	<b>29,767</b>	<b>26,497</b>	<b>112</b>	<b>111</b>	<b>113</b>	<b>105,730</b>

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

<sup>2</sup> 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

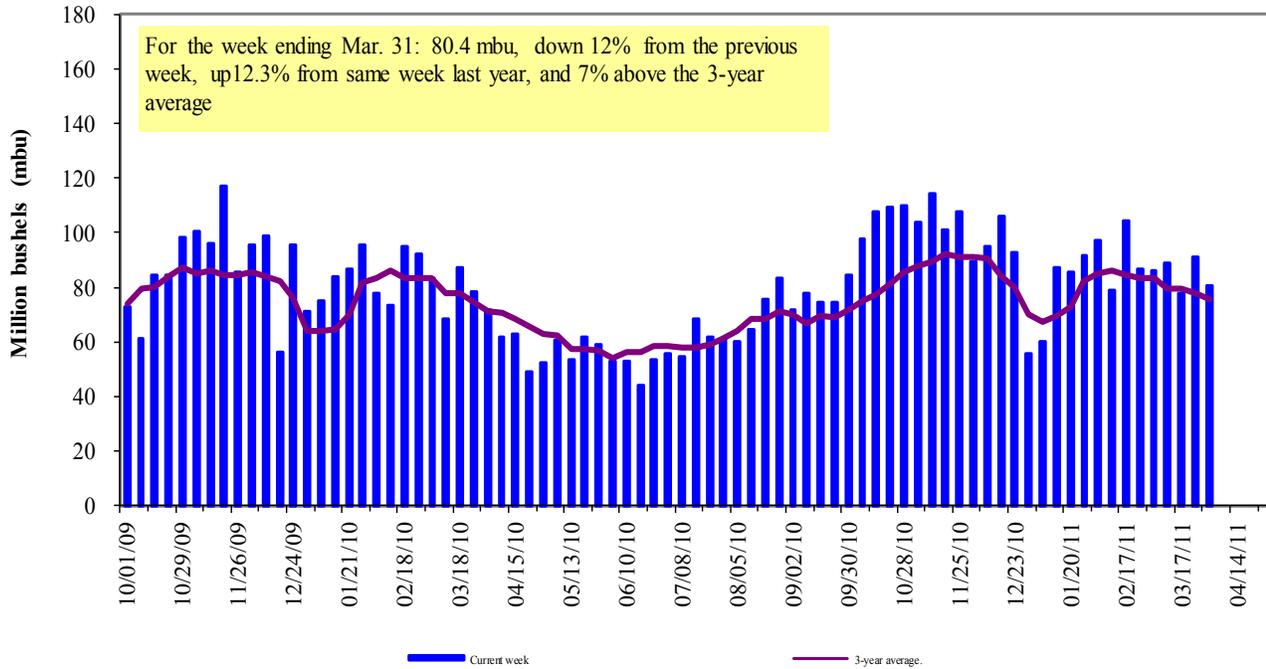
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The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 61 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2010.

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Figure 14

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

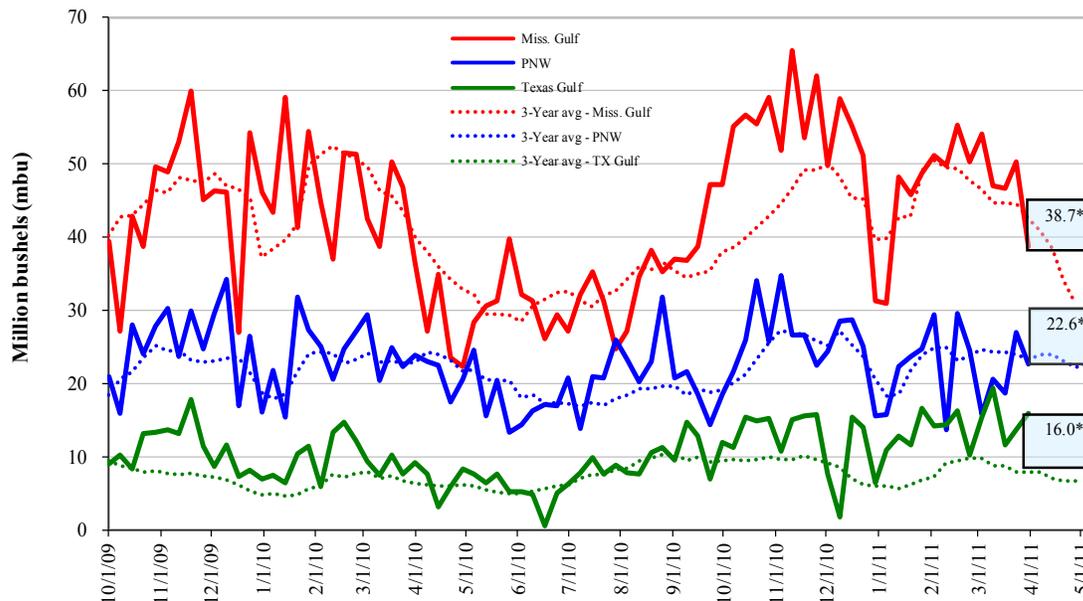


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

**U.S. Grain Inspections: U.S. Gulf and PNW<sup>1</sup> (wheat, corn, and soybeans)**



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

Mar. 31 % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 23	up 16	down 15	down 16
Last year (same week)	up 6	up 75	up 20	down 5
3-yr avg. (4-wk mov. avg.)	down 9	up 102	up 9	down 10

# Ocean Transportation

Table 17

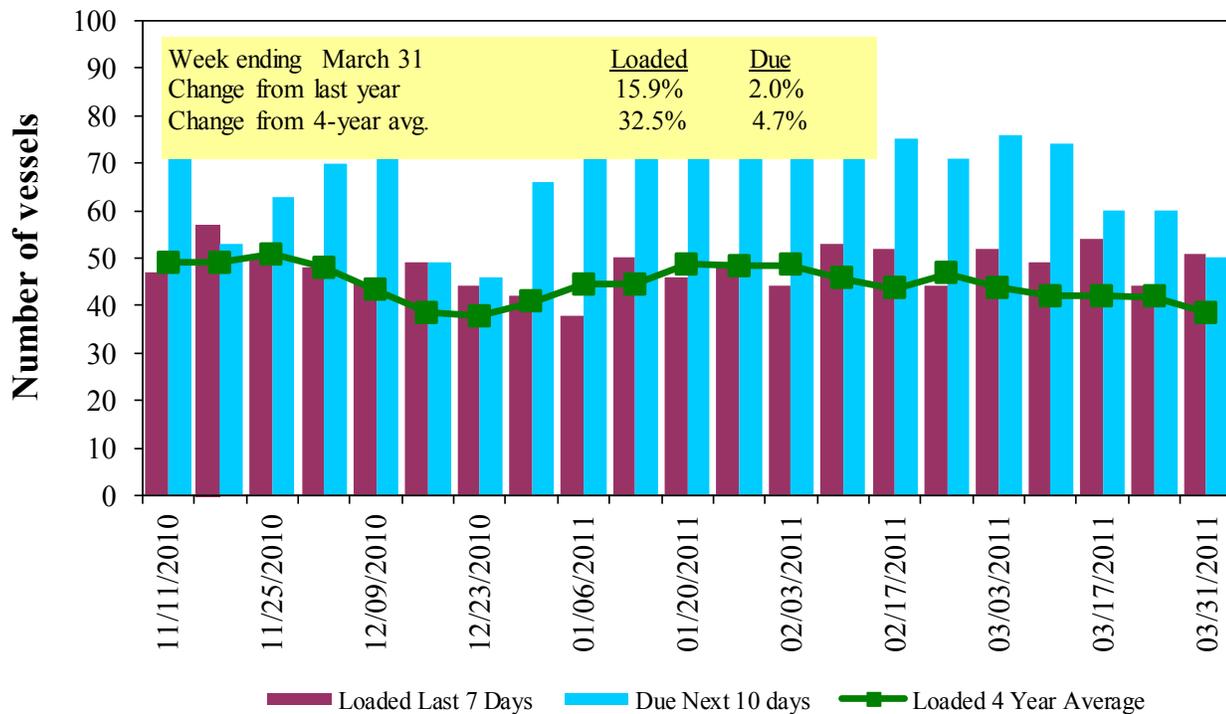
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
3/31/2011	42	51	50	20	18
3/24/2011	50	44	60	21	0
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<sup>1</sup> Vessel Loading Activity**

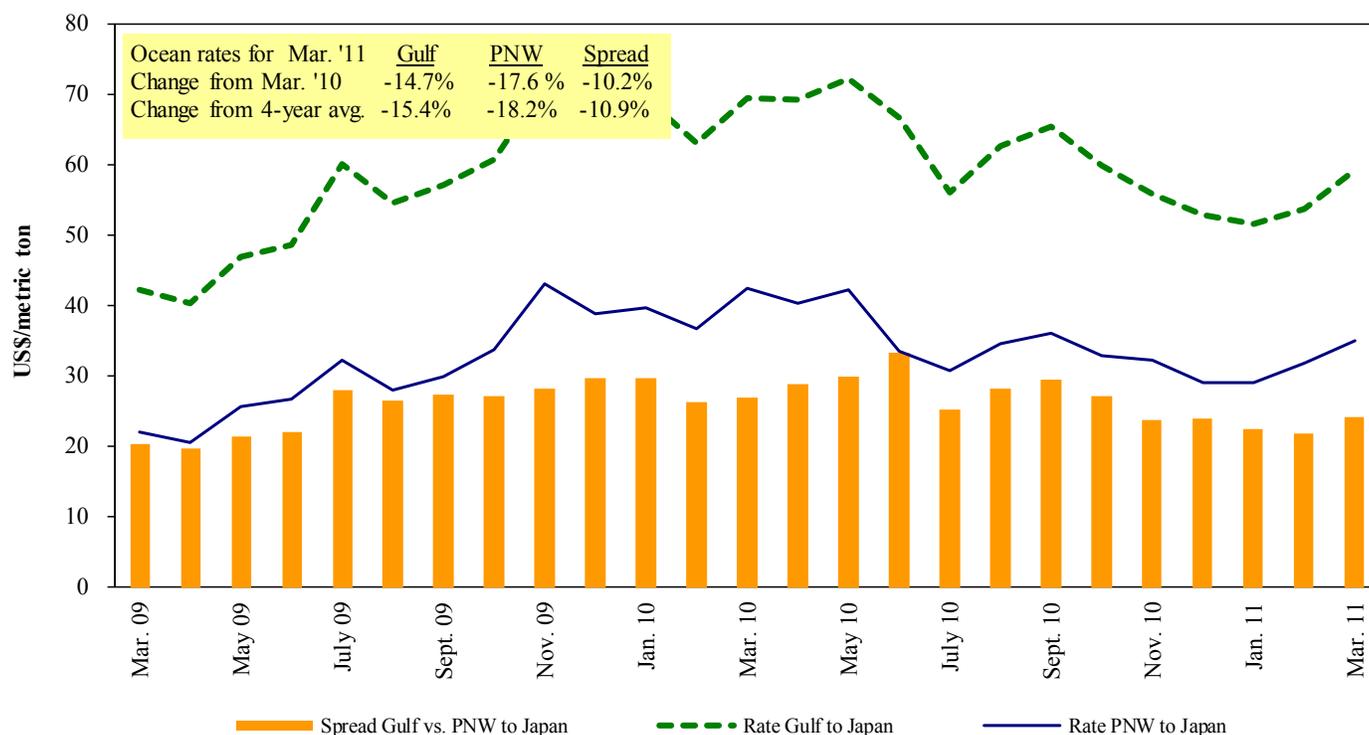


Source: Transportation & Marketing Programs/AMS/USDA

<sup>1</sup>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 4/2/2011

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Mar 20/29	52,000	52.00
U.S. Gulf	China	Heavy Grain	Mar 8/15	55,000	53.60
U.S. Gulf	China	Heavy Grain	Feb 1/28	58,000	48.00
U.S. Gulf	China	Heavy Grain	Dec 22/31	55,000	57.00
U.S. Gulf	China	Heavy Grain	Dec 20/30	55,000	57.00
U.S. Gulf	China	Heavy Grain	Dec 1/5	55,000	63.00
U.S. Gulf	Nicaragua	Corn/Soybean meal	Feb 7/17	24,000	56.42
U.S. Gulf	Djibouti <sup>1</sup>	Wheat	Mar 31/Apr 9	17,260	129.95
U.S. Gulf	Turkey	Heavy Grain	Jan 25/30	2,500	46.00
PNW	Pakistan	Heavy Grain	Jan 15/25	42,000	46.00
PNW	Rotterdam	Heavy Grain	Feb 15/25	55,000	26.00
Brazil	China	Heavy Grain	April 5/15	60,000	51.00
Brazil	China	Heavy Grain	April 1/15	55,000	47.00
River Plate	Algeria	Corn	Jan 22/27	30,000	43.00
River Plate	Algeria	Corn	Dec 5/10	25,000	36.00
River Plate	Morocco	corn	Feb 28/Mar 8	25,000	37.25
Uruguay	Algeria	Wheat	Feb 5/10	25,000	46.00

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

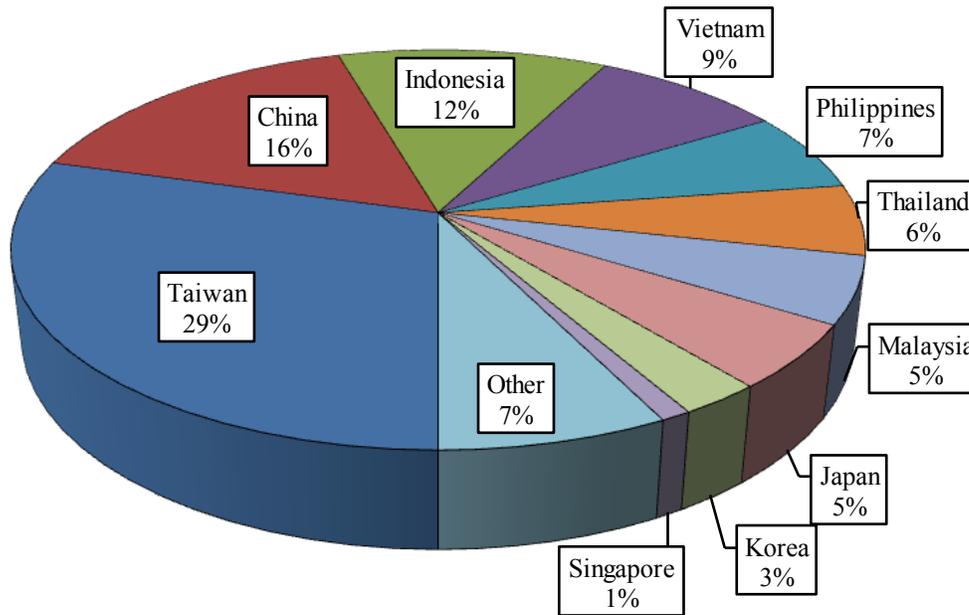
<sup>1</sup>75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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, December 2010**

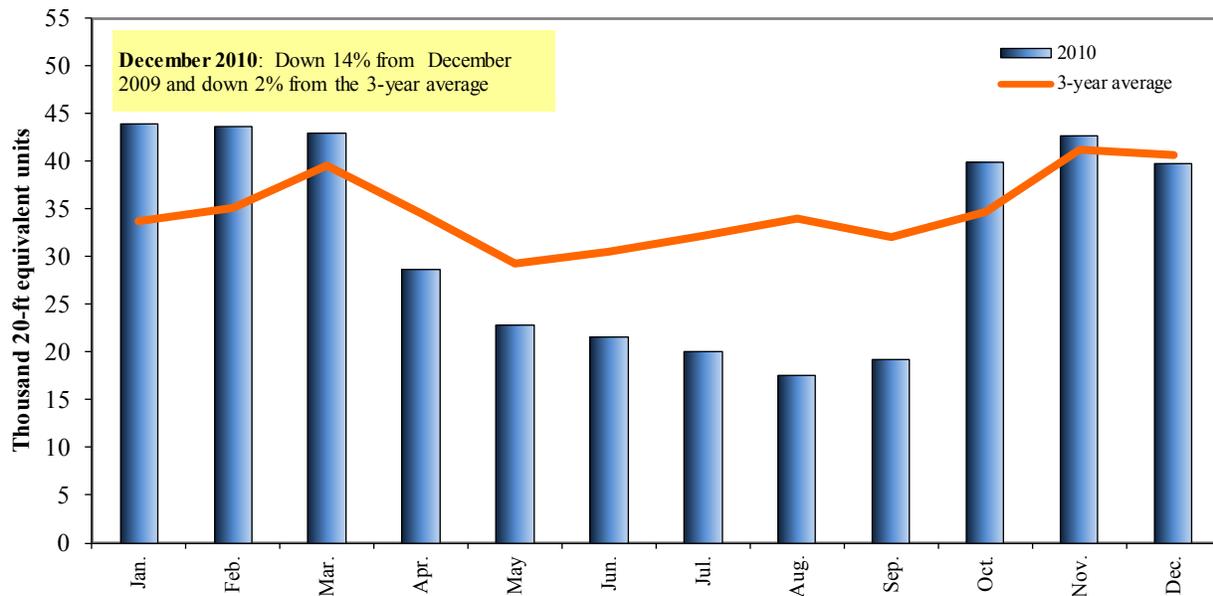


Source: Port Import Export Reporting Service (PIERS)

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

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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