



Agricultural
Marketing
Service



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

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May 31, 2012

WEEKLY HIGHLIGHTS

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Update of Canadian Pacific Rail Strike

On Wednesday, May 30, the Canadian House of Commons passed a back-to-work bill to end the Canadian Pacific (CP) rail strike. The Canadian Senate will vote on the bill today, which would impose binding arbitration to settle the dispute. After the Senate passes the bill, the Governor General's Royal Assent must be given for the bill to become law. This would allow CP's Canadian operations to resume as early as Friday, June 1. The government took action after CP and the railroad union failed to reach an agreement on Sunday regarding CP's proposed reduction in union pensions. The rail strike is expected to cost the Canadian economy about \$500 million per week. CP operations in the United States have not been affected by the strike.

Corn Exports to Asia Lead the Rebound in Weekly Total Inspections

For the week ending May 24, **total inspections of grain** (wheat, corn, and soybeans) for export reached 1.65 million metric tons (mmt), up 2 percent from the previous week, but 15 percent below the same time last year. The 27 percent increase in weekly corn inspections (.751 mmt), mostly to Asia, offset an 18 percent decrease in wheat inspections (.558 mmt) and a 2 percent decrease in soybean inspections (.338 mmt). Transportation demand for exporting corn and soybeans could remain strong for the remainder of the marketing year ending August 31. This is based on the relatively high level of **unshipped balances** (table 12) of soybeans (5.5 mmt) and expected increases in corn **export sales** (table 13) to meet the 2011/12 corn export forecast by USDA.

BNSF Invests in Montana Rail Service

BNSF Railway has announced plans to spend \$111 million on track maintenance and rail capacity projects in Montana. The work includes surfacing and undercutting 956 miles of track, replacing 54 miles of rail and about 210,000 ties, and completing signal upgrades for positive train control implementation. The projects are part of BNSF's \$3.9 billion capital spending budget for 2012.

Cross-Border Trucking Program May Be Threatened by Low Participation of Mexican Truckers

Transport Topics reports a Federal Motor Carrier Safety Administration (FMCSA) official is concerned that low participation by Mexican carriers in the cross-border trucking program could lead to the resumption of Mexican tariffs on U.S. goods. The FMCSA cannot collect the data it needs to judge Mexican carriers' safety without more carriers participating. If the cross-border trucking program fails, U.S. officials could not permanently allow Mexican carriers into the country. Should this happen, Mexico could impose new tariffs on goods imported from the United States. As of May 8, there were only three carriers in the program, who had crossed 33 times. The Department of Transportation, however, is confident that the cross-border program will be successful.

Snapshots by Sector

Rail

U.S. railroads originated 21,173 **carloads of grain** during the week ending May 19, up 7 percent from last week, down 8 percent from last year, and 7 percent higher than the 3-year average.

During the week ending May 24, average June non-shuttle **secondary railcar bids/offers per car** were \$9 above tariff, up \$0.50 from last week and \$22.50 lower than last year. Average shuttle bids/offers were \$269 below tariff, down \$15 from last week and \$13.50 higher than last year.

Barge

During the week ending May 26, **barge grain movements** totaled 500,400 tons, 22 percent lower than the previous week and 26.7 percent lower than the same period last year.

Ocean

During the week ending May 24, 33 **ocean-going grain vessels** were loaded in the Gulf, unchanged from the same period last year. Forty-one vessels are expected to be loaded within the next 10 days, also unchanged from the same period last year.

During the week ending May 25, the **ocean freight rate** for shipping bulk grain from the Gulf to Japan was \$50 per mt, down 2 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$25.50 per mt, down 4 percent from the previous week.

Fuel

During the week ending May 28, U.S. average **diesel fuel prices** decreased 6 cents to \$3.90 per gallon—5 cents lower than the same week last year.

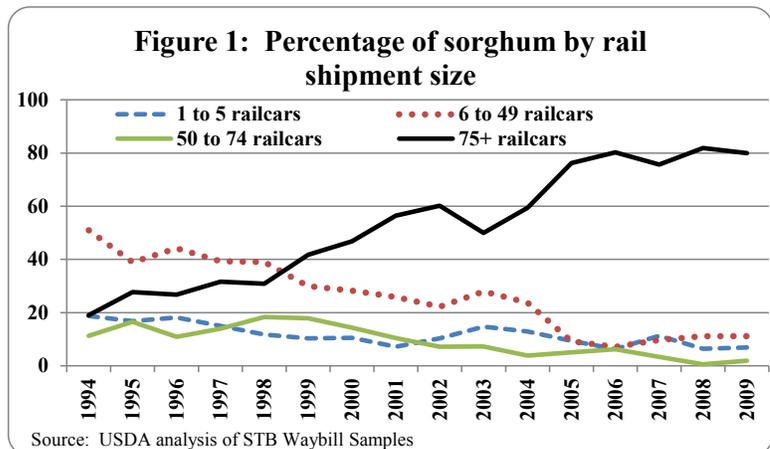
Feature Article/Calendar

Increased Sorghum Shuttle-size Shipments Reflect Lower Rail Freight Costs

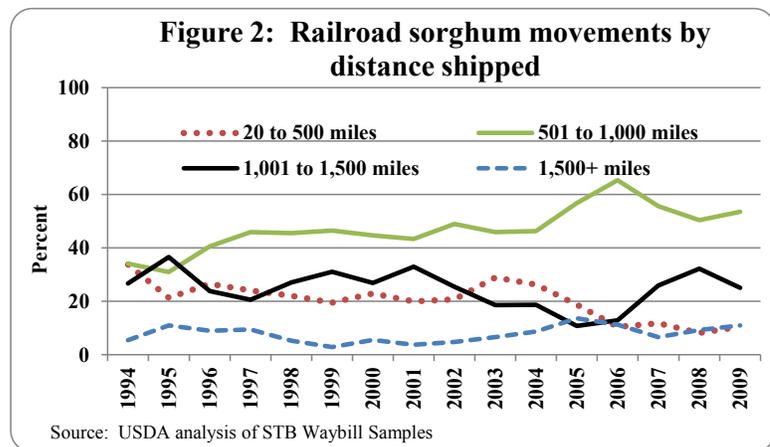
Several respondents to the Grain Transportation Report survey requested more information on transportation of sorghum and other minor crops. Sorghum is grown in dry areas of the Plains from South Dakota to Texas because it uses one-third less water than other grain crops. Most of the U.S. sorghum is grown in Kansas and Texas. Between 1994 and 2009, U.S. sorghum production decreased 43 percent. Yet, the tonnage of sorghum moved by rail decreased by only 35 percent, indicating that railroads have gained market share in the transportation of sorghum. This results from both efficiency gains from railroad pricing and changing sorghum markets.

Sorghum tonnages hauled in shuttle-size shipments (more than 75 railcars) increased 174 percent, from 1.0 million tons in 1994 to 2.75 million tons in 2009, reflecting the lower costs of shuttle-size shipments. Over the same time period, sorghum tonnages hauled by 1- to 5-railcar shipments decreased 76 percent, 6- to 49-railcar shipments decreased by 86 percent, and 50- to 74-railcar shipments decreased by 89 percent.

The percentage of sorghum moved by shuttle-size shipments increased from 19 percent of the rail sorghum tonnage in 1994 to 80 percent in 2009 (Fig. 1). For the same time period, sorghum shipments of 1- to 5-railcars decreased from 19 percent of the rail sorghum tonnage in 1994 to 7 percent in 2009. Likewise, sorghum shipments of 6- to 49-railcars decreased from 51 percent of the rail sorghum tonnage to 11 percent and sorghum shipments of 50- to 74-railcars decreased from 11 percent to 2 percent of the rail sorghum tonnage.



The distance shipped also increased between 1994 and 2009, reflecting comparative advantages of different transportation modes, lower rail costs per mile for longer hauls, and changing sorghum markets. The average length of haul for sorghum was 745 miles in 1994, but increased to 1,144 miles in 2009 (AAR, The Rail Transportation of Grain).



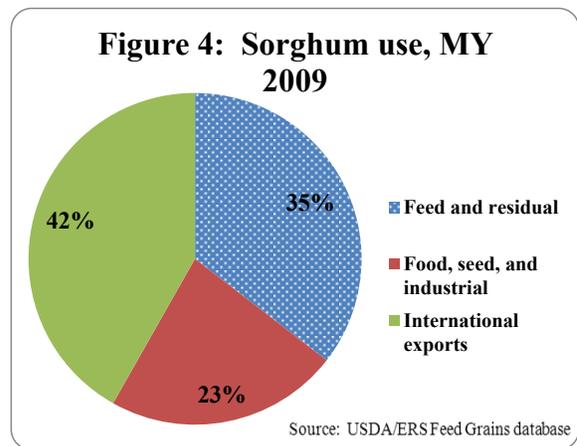
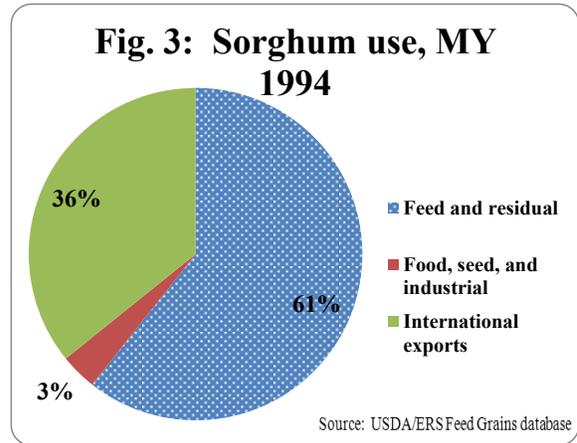
Sorghum shipments between 20 and 500 miles, which are more sensitive to truck competition, decreased from 34 percent of sorghum rail shipments (1.78 million tons) in 1994 to 10 percent (.36 million tons) in 2009, with a tonnage decrease of 80 percent (Fig. 2). In contrast, the

percentage of sorghum rail tonnage moving 501 to 1,000 miles increased from 34 percent (1.8 million tons) in 1994 to 54 percent (1.84 million tons) in 2009, an increase in rail tonnage of 2 percent. The percentage of sorghum rail tonnage moving 1,001 to 1,500 miles decreased from 27 percent (1.4 million tons) in 1994 to 25 percent (.86 million tons) in 2009, a decrease in rail tonnage of 39 percent. The percentage of sorghum rail tonnage moving more than 1,500 miles increased from 5 percent of the rail sorghum movements (.29 million tons) in 1994 to 11 percent (.38 million tons) in 2009, an increase of 31 percent in rail tonnage.

Sorghum usage has changed substantially since 1994. In 1994, 61 percent of sorghum usage was for feed and residual, compared to only 35 percent in 2009 (Fig. 3, 4). Meanwhile, sorghum usage for food, seed, and industrial changed from 3 percent in 1994 to 23 percent in 2009. A large portion of this increase is due to usage of sorghum to produce ethanol. The percent of sorghum exported also increased, from 36 percent of usage in 1994 to 42 percent in 2009, although the tonnage of sorghum exports decreased from 6.2 million tons to 4.6 million tons likely due to overall lower production and stronger domestic consumption.

Over the analyzed period, the transportation trends of larger shipment sizes and longer hauls emerged for sorghum shipments as a greater percentage of the crop was destined for export. If sorghum export share remains strong or increases, more sorghum shipments are likely to end up on rail due to long haul cost efficiencies. New market uses for sorghum, such as biofuels, and future production trends will help determine sorghum modal share in the future.

Marvin.Prater@ams.usda.gov



Rail Transportation

Table 3

Rail Deliveries to Port (carloads)¹

Week ending	Mississippi		Cross-Border		Pacific	Atlantic &	Total
	Gulf	Texas Gulf	Mexico	Northwest	Northwest	East Gulf	
5/30/2012 ^p	18	421	1,242	3,717	190		5,588
5/23/2012 ^r	0	415	1,070	3,948	364		5,797
2012 YTD ^r	3,603	13,729	27,388	94,118	9,682		148,520
2011 YTD ^r	20,052	49,853	20,164	86,573	14,240		190,882
2012 YTD as % of 2011 YTD	18	28	136	109	68		78
Last 4 weeks as % of 2011 ²	2	17	97	99	72		70
Last 4 weeks as % of 4-year avg. ²	2	26	129	102	77		83
Total 2011	27,358	77,515	48,782	191,092	24,088		368,835
Total 2010	33,971	83,492	42,794	177,896	32,780		370,933

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2011 and prior 4-year average.

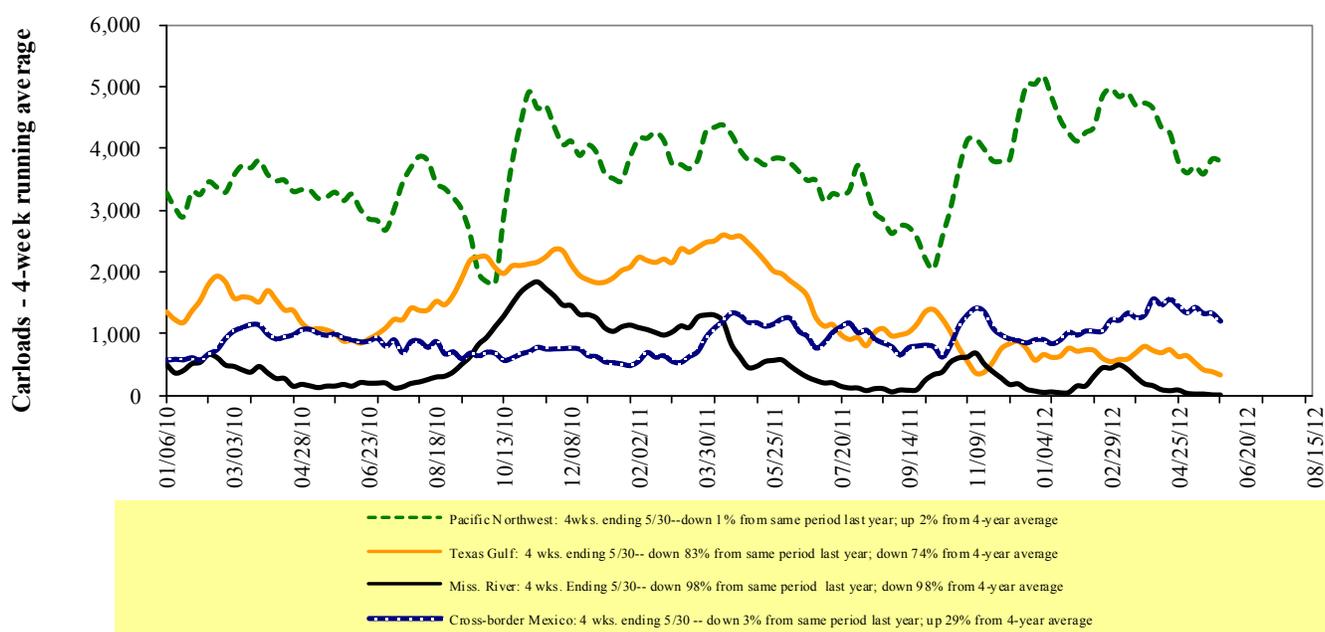
YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 29 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

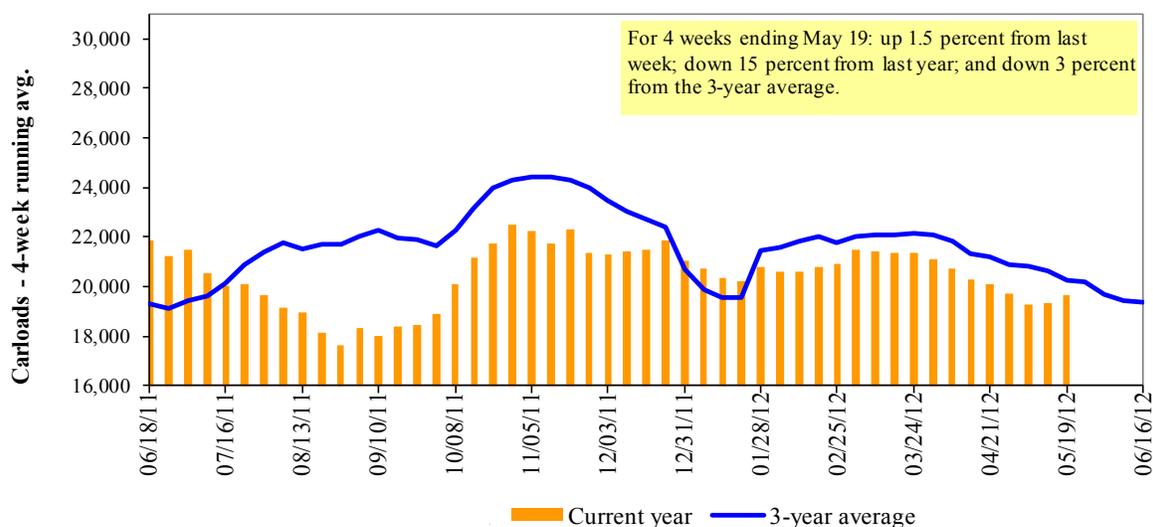
Table 4

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
05/19/12	1,258	2,758	10,360	569	6,228	21,173	3,825	4,343
This week last year	2,018	3,312	11,214	874	5,534	22,952	4,332	5,136
2012 YTD	40,209	56,676	202,179	9,787	102,449	411,300	78,352	99,244
2011 YTD	42,142	60,769	229,560	12,771	123,279	468,521	82,205	95,638
2012 YTD as % of 2011 YTD	95	93	88	77	83	88	95	104
Last 4 weeks as % of 2011 ¹	84	87	83	72	90	85	88	79
Last 4 weeks as % of 3-yr avg. ¹	78	93	101	71	103	97	95	80
Total 2011	98,506	150,869	546,090	34,683	292,401	1,122,549	200,610	269,399

¹As a percent of the same period in 2009 and the prior 3-year average. YTD = year-to-date.

Source: Association of American Railroads (www.aar.org)

Figure 3**Total Weekly U.S. Class I Railroad Grain Car Loadings**

Source: Association of American Railroads

Table 5

Railcar Auction Offerings¹ (\$/car)²

Week ending	Delivery period							
	Jun-12	Jun-11	Jul-12	Jul-11	Aug-12	Aug-11	Sep-12	Sep-11
BNSF ³								
COT grain units	1	5	no bids	no bids	no offer	no offer	no offer	no offer
COT grain single-car ⁵	0	0 . . 25	0 . . 10	0	no offer	no offer	no offer	no offer
UP ⁴								
GCAS/Region 1	no bids	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

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.

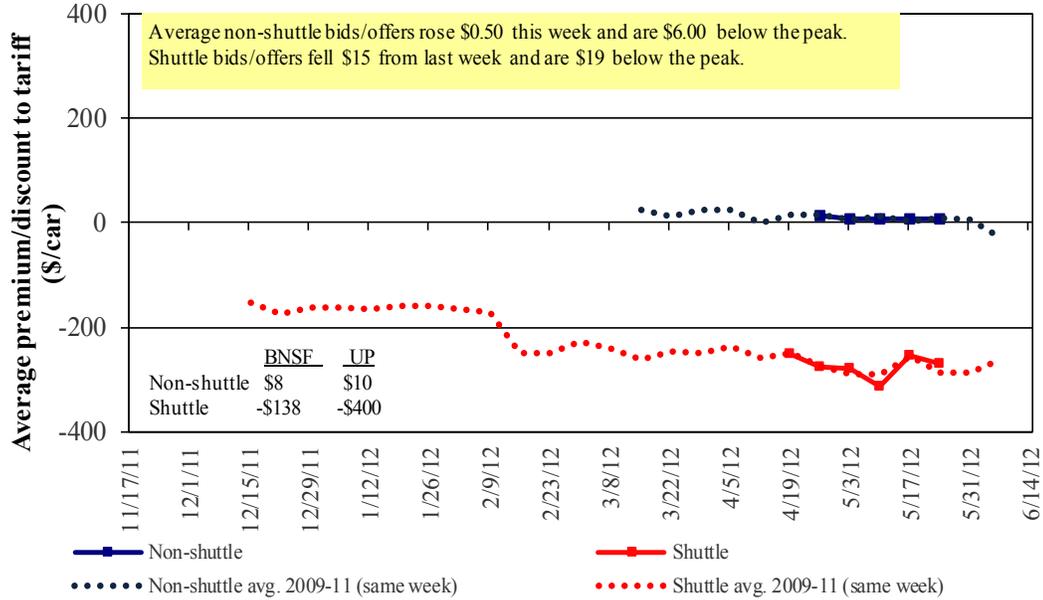
⁵Range is shown because average is not available. Not available = n/a.

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 June 2012, Secondary Market

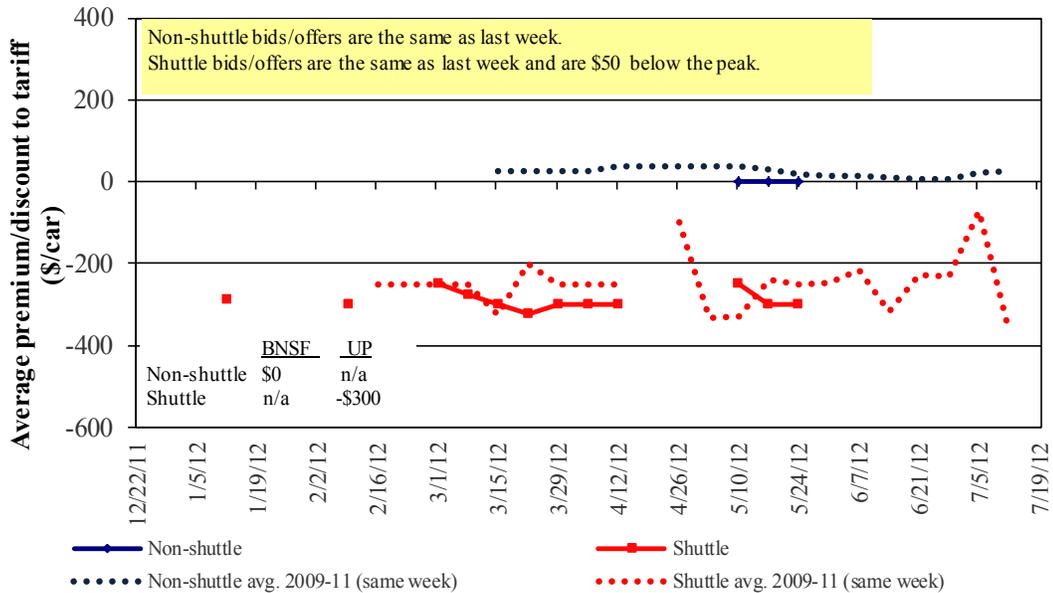


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in July 2012, Secondary Market

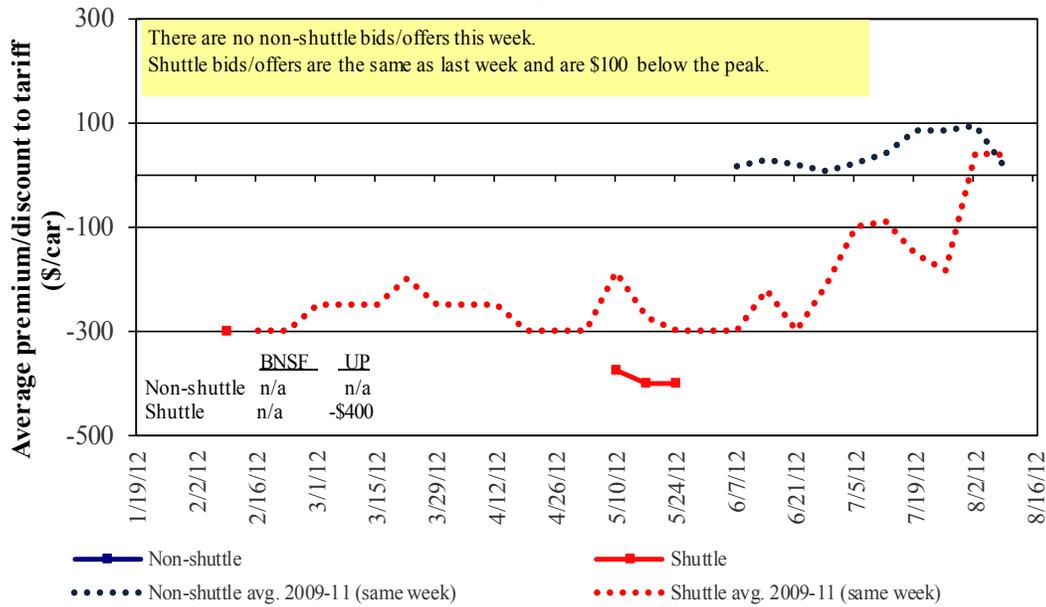


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in August 2012, 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 Railcar Market (\$/car)¹

Week ending	Delivery period					
	Jun-12	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12
Non-shuttle						
BNSF-GF	8	-	n/a	n/a	n/a	n/a
Change from last week	-	-	n/a	n/a	n/a	n/a
Change from same week 2011	(30)	(75)	n/a	n/a	n/a	n/a
UP-Pool	10	n/a	n/a	n/a	100	n/a
Change from last week	1	n/a	n/a	n/a	7	n/a
Change from same week 2011	(15)	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	(138)	n/a	n/a	n/a	n/a	600
Change from last week	(30)	n/a	n/a	n/a	n/a	25
Change from same week 2011	116	n/a	n/a	n/a	n/a	n/a
UP-Pool	(400)	(300)	(400)	(250)	475	n/a
Change from last week	-	-	-	-	(25)	n/a
Change from same week 2011	(89)	75	(100)	-	(225)	n/a

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

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

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,

n/a = not available; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

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

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

Effective date:				Fuel	Tariff plus surcharge per:		Percent
5/1/2012	Origin region*	Destination region*	Tariff rate/car	surcharge per car	metric ton	bushe ²	change Y/Y ³
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$2,992	\$207	\$31.77	\$0.86	4
	Grand Forks, ND	Duluth-Superior, MN	\$3,260	\$122	\$33.59	\$0.91	15
	Wichita, KS	Los Angeles, CA	\$5,895	\$627	\$64.77	\$1.76	4
	Wichita, KS	New Orleans, LA	\$3,492	\$365	\$38.30	\$1.04	4
	Sioux Falls, SD	Galveston-Houston, TX	\$5,573	\$515	\$60.46	\$1.65	4
	Northwest KS	Galveston-Houston, TX	\$3,760	\$400	\$41.31	\$1.12	4
	Amarillo, TX	Los Angeles, CA	\$3,959	\$556	\$44.84	\$1.22	4
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,038	\$412	\$34.26	\$0.93	8
	Toledo, OH	Raleigh, NC	\$4,382	\$468	\$48.16	\$1.31	16
	Des Moines, IA	Davenport, IA	\$1,934	\$87	\$20.07	\$0.55	5
	Indianapolis, IN	Atlanta, GA	\$3,821	\$351	\$41.43	\$1.13	19
	Indianapolis, IN	Knoxville, TN	\$3,273	\$225	\$34.74	\$0.95	18
	Des Moines, IA	Little Rock, AR	\$3,074	\$257	\$33.08	\$0.90	5
	Des Moines, IA	Los Angeles, CA	\$4,985	\$747	\$56.93	\$1.55	14
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,314	\$454	\$37.42	\$1.02	4
	Toledo, OH	Huntsville, AL	\$3,497	\$332	\$38.02	\$1.03	19
	Indianapolis, IN	Raleigh, NC	\$4,453	\$471	\$48.90	\$1.33	16
	Indianapolis, IN	Huntsville, AL	\$3,189	\$225	\$33.90	\$0.92	21
	Champaign-Urbana, IL	New Orleans, LA	\$3,382	\$412	\$37.68	\$1.03	8
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,351	\$361	\$36.86	\$1.00	4
	Wichita, KS	Galveston-Houston, TX	\$3,247	\$281	\$35.03	\$0.95	4
	Chicago, IL	Albany, NY	\$3,645	\$438	\$40.55	\$1.10	5
	Grand Forks, ND	Portland, OR	\$4,832	\$623	\$54.17	\$1.47	4
	Grand Forks, ND	Galveston-Houston, TX	\$5,854	\$649	\$64.58	\$1.76	5
	Northwest KS	Portland, OR	\$4,727	\$656	\$53.45	\$1.45	3
	Corn	Minneapolis, MN	Portland, OR	\$4,800	\$759	\$55.20	\$1.50
Sioux Falls, SD		Tacoma, WA	\$4,760	\$695	\$54.17	\$1.47	4
Champaign-Urbana, IL		New Orleans, LA	\$2,857	\$412	\$32.47	\$0.88	7
Lincoln, NE		Galveston-Houston, TX	\$3,310	\$405	\$36.89	\$1.00	5
Des Moines, IA		Amarillo, TX	\$3,430	\$323	\$37.27	\$1.01	4
Minneapolis, MN		Tacoma, WA	\$4,800	\$753	\$55.14	\$1.50	4
Council Bluffs, IA		Stockton, CA	\$4,200	\$779	\$49.44	\$1.35	5
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,040	\$695	\$56.95	\$1.55	5
	Minneapolis, MN	Portland, OR	\$5,030	\$759	\$57.49	\$1.56	5
	Fargo, ND	Tacoma, WA	\$4,930	\$618	\$55.09	\$1.50	5
	Council Bluffs, IA	New Orleans, LA	\$3,710	\$476	\$41.57	\$1.13	6
	Toledo, OH	Huntsville, AL	\$2,672	\$332	\$29.83	\$0.81	6
	Grand Island, NE	Portland, OR	\$5,115	\$671	\$57.46	\$1.56	13

¹A unit train refers to shipments of at least 25 cars. Shuttle train rates are available for qualified shipments of 75-120 cars that meet railroad efficiency requirements.

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

³Percentage change year over year calculated using tariff rate plus fuel surcharge

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

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

Table 8

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

Effective date: 5/1/2012

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel		Percent change Y/Y ⁴	
				surcharge per car ²	Tariff plus surcharge per: metric ton ³ bushel ³		
Wheat	MT	Chihuahua, CI	\$7,741	\$659	\$85.83	\$2.33	13
	OK	Cautitlan, EM	\$6,747	\$801	\$77.12	\$2.10	11
	KS	Guadalajara, JA	\$7,411	\$774	\$83.63	\$2.27	7
	TX	Salinas Victoria, NL	\$3,703	\$302	\$40.92	\$1.11	14
Corn	IA	Guadalajara, JA	\$7,699	\$910	\$87.96	\$2.23	3
	SD	Penjamo, GJ	\$7,776	\$863	\$88.27	\$2.24	8
	NE	Queretaro, QA	\$7,073	\$808	\$80.53	\$2.04	7
	SD	Salinas Victoria, NL	\$5,650	\$656	\$64.43	\$1.63	6
	MO	Tlalhepantla, EM	\$6,502	\$785	\$74.45	\$1.89	12
	SD	Torreon, CU	\$6,522	\$722	\$74.02	\$1.88	5
Soybeans	MO	Bojay (Tula), HG	\$7,015	\$768	\$79.51	\$2.16	4
	NE	Guadalajara, JA	\$7,904	\$878	\$89.73	\$2.44	5
	IA	El Castillo, JA ⁵	\$8,255	\$857	\$93.11	\$2.53	7
	KS	Torreon, CU	\$6,421	\$544	\$71.17	\$1.94	5
Sorghum	OK	Cautitlan, EM	\$5,670	\$655	\$64.62	\$1.64	7
	TX	Guadalajara, JA	\$6,653	\$561	\$73.71	\$1.87	6
	NE	Penjamo, GJ	\$7,426	\$783	\$83.88	\$2.13	7
	KS	Queretaro, QA	\$6,425	\$492	\$70.67	\$1.79	5
	NE	Salinas Victoria, NL	\$5,128	\$576	\$58.28	\$1.48	7
	NE	Torreon, CU	\$6,068	\$643	\$68.57	\$1.74	4

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

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

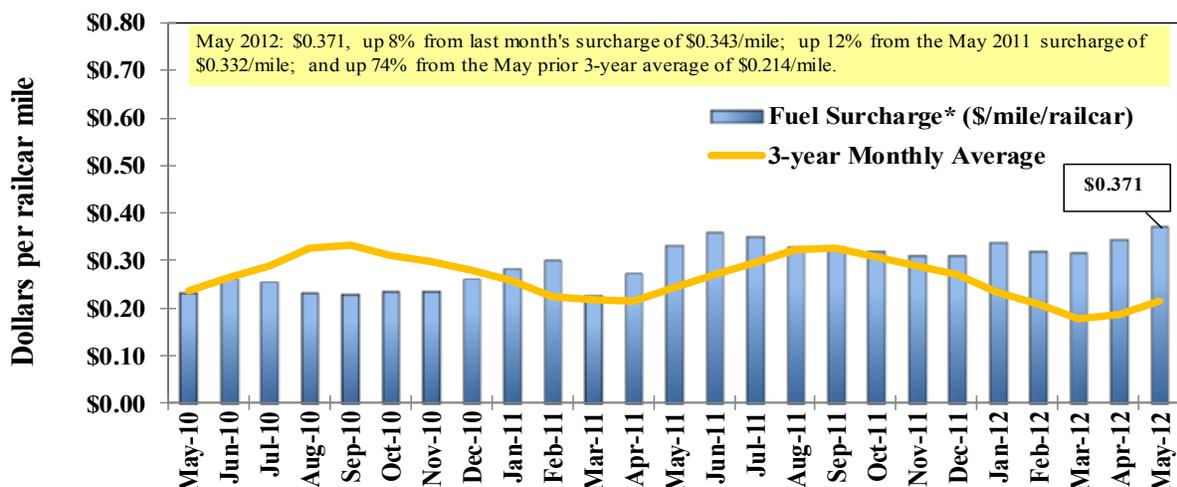
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

⁵Beginning 12/6/10, El Castillo, JA replaced Penjamo, GJ as the destination

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹

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

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

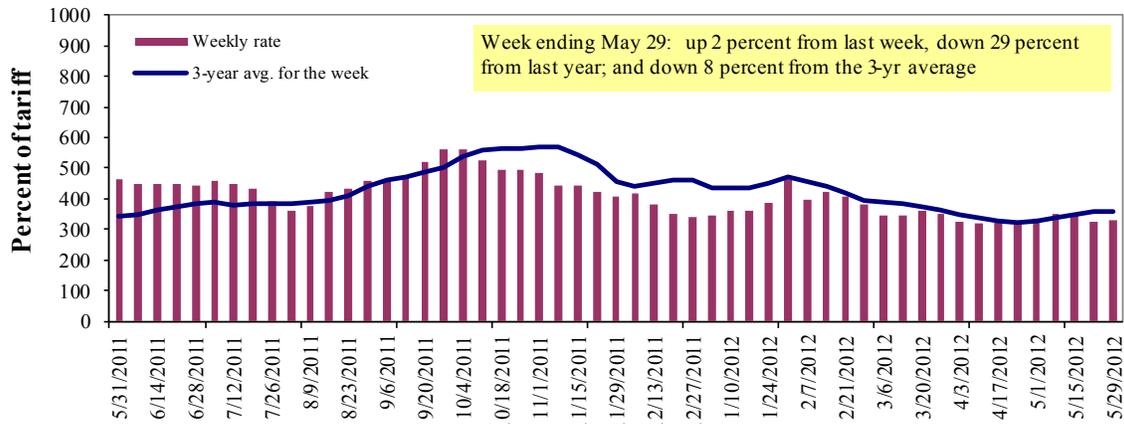
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

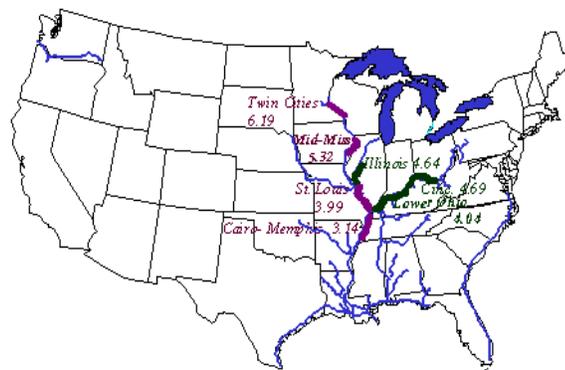
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	5/29/2012	423	348	330	240	273	273	205
	5/22/2012	423	350	323	242	277	277	210
\$/ton	5/29/2012	26.18	18.51	15.31	9.58	12.80	11.03	6.44
	5/22/2012	26.18	18.62	14.99	9.66	12.99	11.19	6.59
Current week % change from the same week:								
	Last year	-22	-28	-29	-31	-38	-38	-33
	3-year avg. ²	-3	-9	-8	-8	-13	-13	-14
Rate¹	June	423	355	433	243	280	280	213
	August	455	440	445	383	450	450	355

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9
Benchmark tariff rates



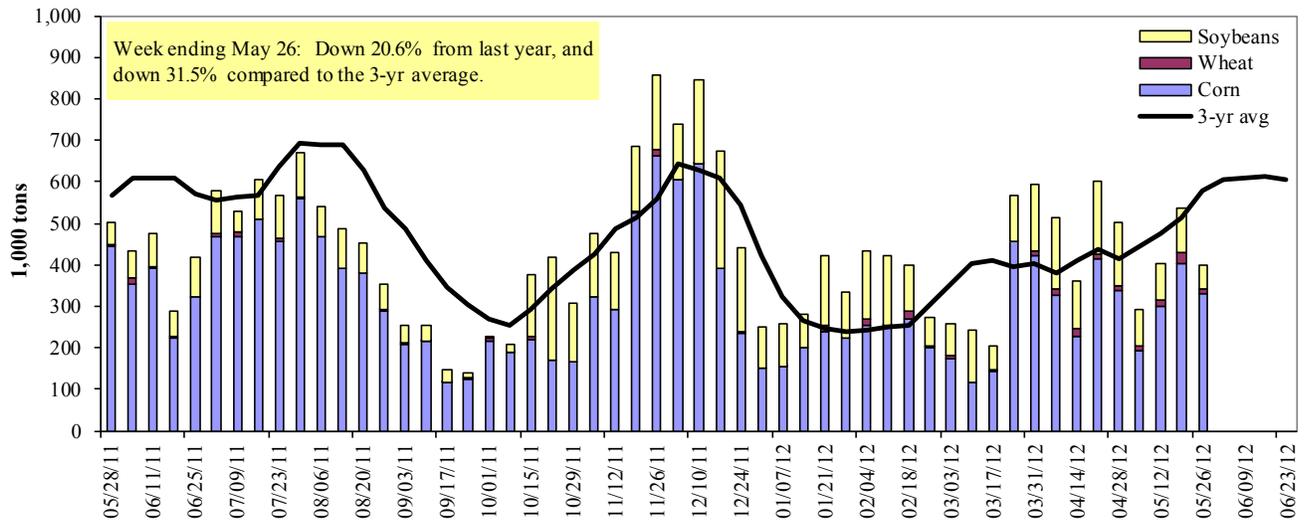
Calculating barge rate per ton:

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

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

Figure 10

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



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

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

Table 10

Barge Grain Movements (1,000 tons)

Week ending 5/26/2012	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	159	2	15	0	176
Winfield, MO (L25)	207	3	29	0	239
Alton, IL (L26)	335	15	49	0	399
Granite City, IL (L27)	332	11	55	0	399
Illinois River (L8)	83	10	6	0	100
Ohio River (L52)	40	3	21	0	64
Arkansas River (L1)	0	29	8	0	38
Weekly total - 2012	372	44	85	0	500
Weekly total - 2011	513	57	112	0	683
2012 YTD ¹	7,584	764	4,394	134	12,875
2011 YTD	7,358	485	3,400	134	11,377
2012 as % of 2011 YTD	103	157	129	100	113
Last 4 weeks as % of 2011 ²	89	72	143	138	102
Total 2011	19,921	1,460	8,553	422	30,356

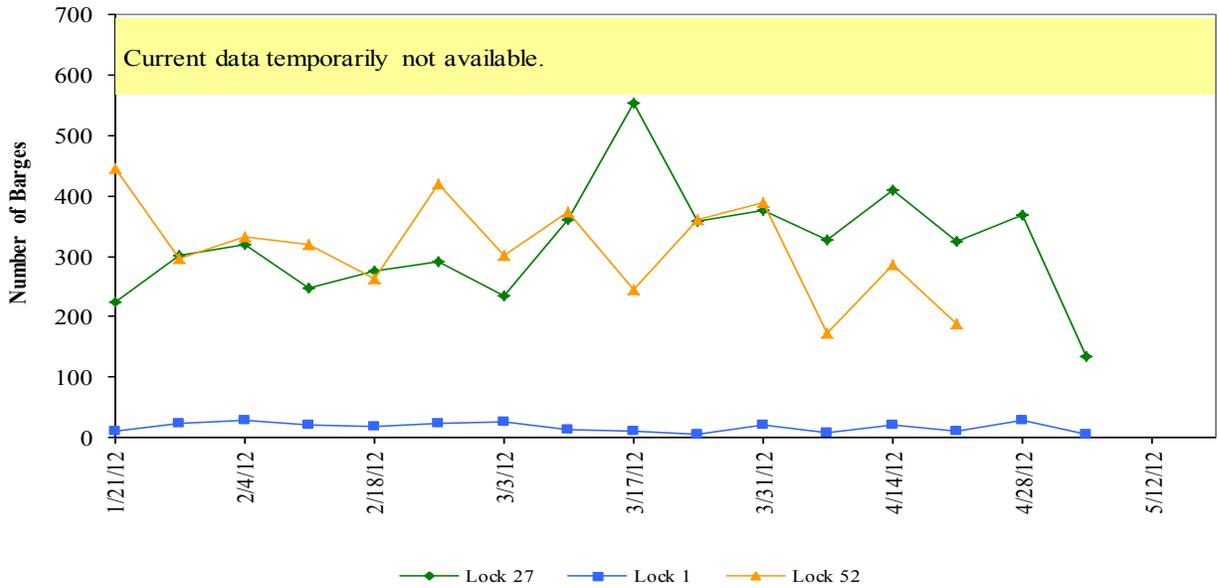
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2011.

Note: Total may not add exactly, due to rounding

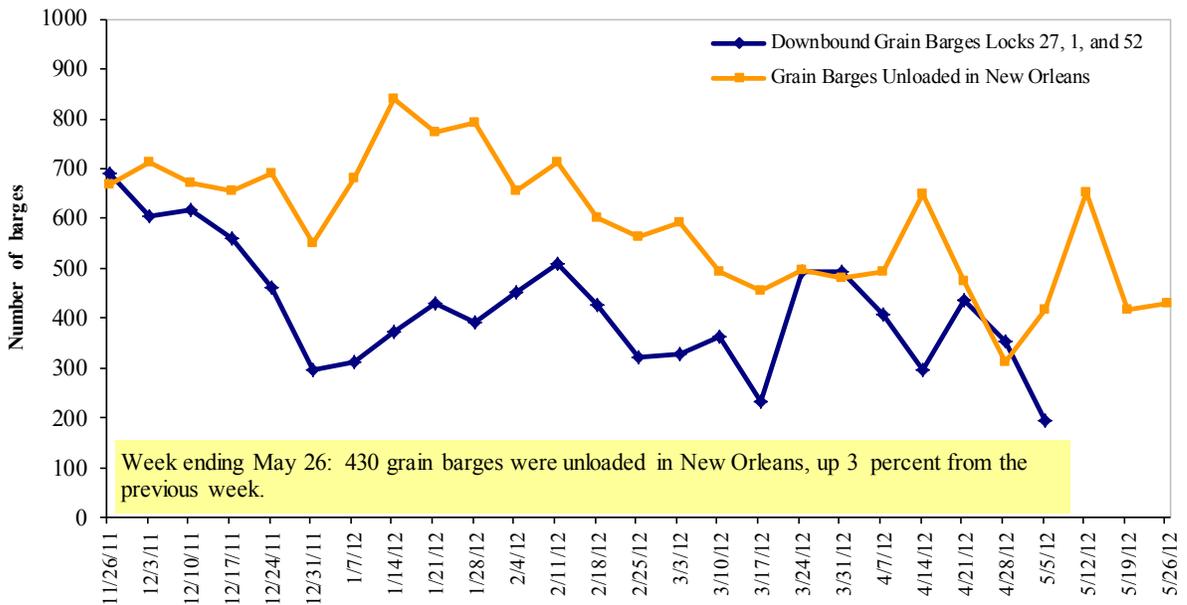
Source: U.S. Army Corps of Engineers (www.mvr.usace.army.mil/mvrirmi/omni/webprts/default.asp)

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



Source: U.S. Army Corps of Engineers

Figure 12
Grain Barges for Export in New Orleans Region



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

*Current downbound grain barge data temporarily not available.

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 5/28/2012 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.940	-0.059	-0.022
	New England	4.072	-0.058	-0.049
	Central Atlantic	4.023	-0.056	-0.059
	Lower Atlantic	3.854	-0.062	-0.043
II	Midwest ²	3.795	-0.059	-0.101
III	Gulf Coast ³	3.802	-0.059	-0.082
IV	Rocky Mountain	3.948	-0.039	-0.072
V	West Coast	4.164	-0.069	0.003
	California	4.228	-0.075	0.001
Total	U.S.	3.897	-0.059	-0.051

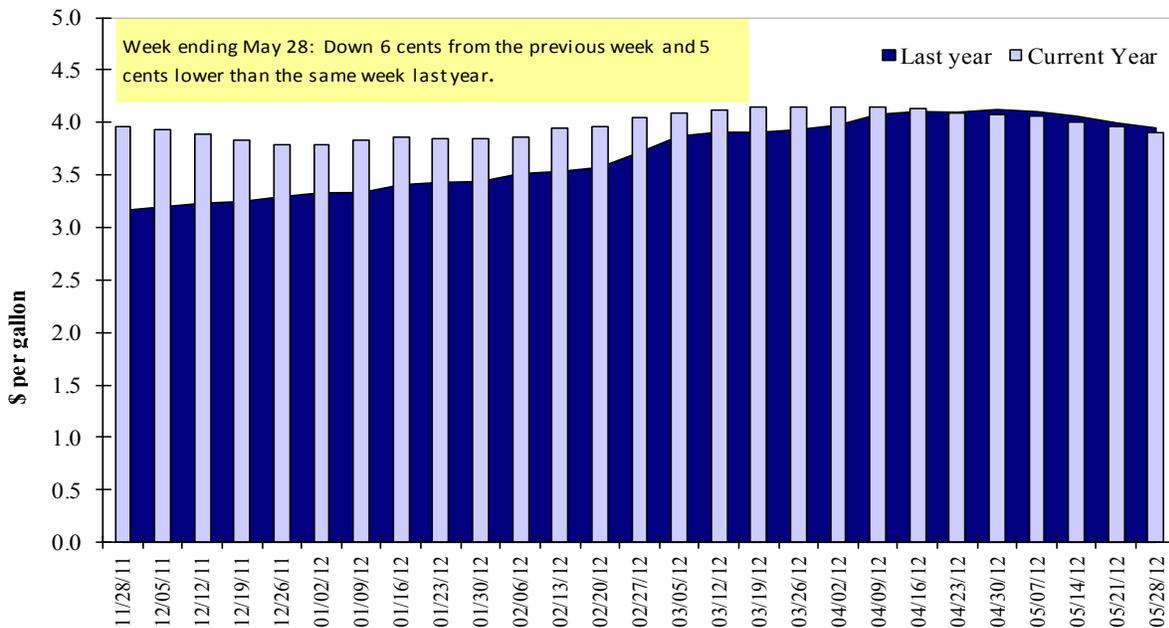
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
5/17/2012	774	449	888	430	45	2,446	8,830	5,510	16,786
This week year ago	1,593	175	749	615	23	3,288	11,044	4,422	18,754
Cumulative exports-marketing year²									
2011/12 YTD	9,490	3,995	6,052	5,462	455	25,453	29,193	30,391	85,037
2010/11 YTD	15,301	2,747	8,378	4,665	956	32,045	31,967	37,053	101,065
YTD 2011/12 as % of 2010/11	62	145	72	117	48	79	91	82	84
Last 4 wks as % of same period 2010/11	63	363	100	89	174	94	86	116	95
2010/11 Total	15,837	2,828	8,623	4,717	979	32,984	44,569	39,753	117,306
2009/10 Total	8,458	2,733	5,329	3,897	983	21,400	47,700	39,285	108,385

¹ Current unshipped export sales to date

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

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

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

Table 13

Top 5 Importers¹ of U.S. Corn

Week ending 05/17/12	Total Commitments ²			% change current MY from last MY	Exports ³ 2010/11
	2012/13 Next MY	2011/12 Current MY	2010/11 Last MY		
		- 1,000 mt -			- 1,000 mt -
Japan	961	10,804	13,153	(18)	14,279
Mexico	13	9,345	6,587	42	7,019
Korea	181	3,786	5,307	(29)	6,104
China*	988	4,791	431	1,012	978
Taiwan	0	1,504	2,391	(37)	2,393
Top 5 importers	2,142	30,230	27,869	8	30,772
Total US corn export sales	5,281	38,023	43,011	(12)	46,600
% of Projected	11%	88%	92%		
Change from Last Week	326	156	727		
Top 5 importers' share of U.S. corn export sales	41%	80%	65%		
USDA forecast, May 2012	48,260	43,180	46,600	(7)	
Corn Use for Ethanol USDA forecast, Ethanol May 2012	127,000	127,000	127,534	(0.4)	

(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, or Export Sales Query--
http://www.fas.usda.gov/esrquery/

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

*China -- New to the Top 5 in the 2011/12 Marketing Year, replacing Egypt.

Table 14

Top 5 Importers¹ of U.S. Soybeans

Week Ending 05/17/2012	Total Commitments ²			% change current MY from last MY	Exports ³ 2010/11
	2012/13 Next MY	2011/12 Current MY	2010/11 Last MY		
		- 1,000 mt -			- 1,000 mt -
China	8,145	22,532	25,549	(12)	24,445
Mexico	96	2,973	2,919	2	3,215
Japan	120	1,673	2,014	(17)	1,887
EU	60	1,040	2,599	(60)	2,607
Indonesia	64	1,372	1,448	(5)	1,397
Top 5 importers	8,485	29,588	34,529	(14)	33,551
Total US soybean export sales	10,522	35,900	41,475	(13)	40,860
% of Projected	26%	100%	102%		
Change from last week	154	800	163		
Top 5 importers' share of U.S. soybean export sales	81%	82%	83%		
USDA forecast, May 2012	40,960	35,790	40,860	(12)	

(n) indicates negative number.

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

Table 15

Top 10 Importers¹ of All U.S. Wheat

Week Ending 05/17/2012	Total Commitments ²			% change current MY from last MY	Exports ³ 2010/11
	2012/13 Next MY	2011/12 Current MY	2010/11 Last MY		
		- 1,000 mt -			- 1,000 mt -
Nigeria	140	3,348	3,815	(12)	3,233
Japan	125	3,821	3,614	6	3,148
Mexico	716	3,516	2,662	32	2,601
Philippines	311	2,089	1,896	10	1,518
Korea	224	2,083	1,666	25	1,111
Peru	0	552	994	(44)	923
Taiwan	96	974	953	2	913
Colombia	88	455	835	(45)	783
Indonesia	4	830	782	6	781
Yemen	0	418	873	(52)	659
Top 10 importers	1,702	18,084	18,090	(0.0)	15,670
Total US wheat export sales	3,329	27,899	35,334	(21)	35,080
% of Projected	11%	100%	101%		
Change from last week	755	73	-72		
Top 10 importers' share of U.S. wheat export sales	51%	65%	51%		
USDA forecast, May 2012	31,300	27,900	35,080	(20)	

(n) indicates negative number.

¹ Modified from the FAS 2010/11 Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.² Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
http://www.fas.usda.gov/esrquery/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 05/24/12	Previous Week ¹	Current Week as % of Previous	2012 YTD ¹	2011 YTD ¹	2012 YTD as % of 2011 YTD	Last 4-weeks as % of		Total ¹ 2011
							2011	3-yr. avg.	
Pacific Northwest									
Wheat	239	317	75	5,780	6,102	95	85	117	13,995
Corn	188	89	211	2,894	3,737	77	69	70	9,198
Soybeans	128	203	63	4,384	3,095	142	317	373	7,321
Total	555	608	91	13,058	12,933	101	95	114	30,513
Mississippi Gulf									
Wheat	184	128	144	2,779	2,338	119	164	218	5,031
Corn	410	385	106	8,998	10,833	83	79	67	26,267
Soybeans	130	73	178	8,574	9,343	92	165	103	19,262
Total	724	586	123	20,351	22,514	90	105	90	50,560
Texas Gulf									
Wheat	84	198	43	2,082	6,225	33	41	66	10,837
Corn	8	0	n/a	287	567	51	29	36	1,021
Soybeans	0	0	n/a	0	763	0	0	0	926
Total	92	198	47	2,369	7,556	31	40	62	12,784
Interior									
Wheat	15	29	53	496	465	107	89	179	1,110
Corn	141	113	125	3,543	2,828	125	78	112	7,509
Soybeans	72	65	112	1,824	1,754	104	78	125	4,273
Total	228	206	111	5,862	5,047	116	158	120	12,892
Great Lakes									
Wheat	9	8	114	54	468	12	8	18	1,038
Corn	0	0	n/a	30	8	356	0	0	178
Soybeans	0	0	n/a	41	22	185	176	207	382
Total	9	8	114	125	499	25	23	44	1,598
Atlantic									
Wheat	27	0	n/a	116	520	22	106	259	686
Corn	5	5	97	80	153	52	38	49	295
Soybeans	7	5	153	467	410	114	110	114	1,042
Total	39	10	412	663	1,083	61	89	156	2,022
U.S. total from ports²									
Wheat	558	678	82	11,307	16,118	70	78	116	32,697
Corn	751	592	127	15,832	18,126	87	78	73	44,466
Soybeans	338	346	98	15,291	15,388	99	165	146	33,205
Total	1,647	1,616	102	42,429	49,632	85	88	97	110,369

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

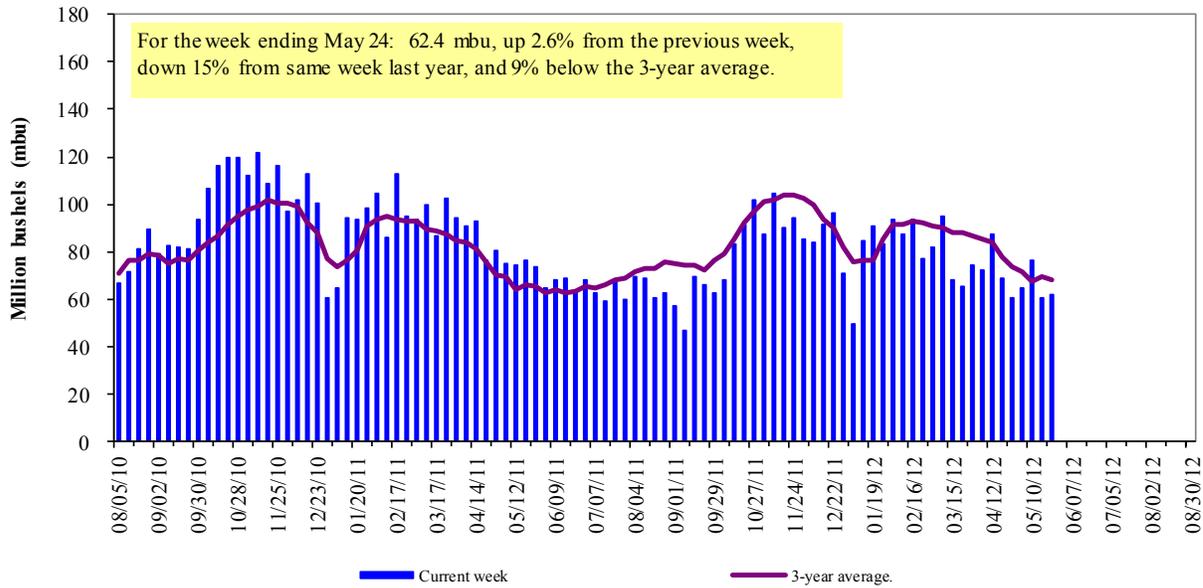
² Total includes only port regions shown above; Interior land-based shipments now included.

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 59 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2011.

Figure 14

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

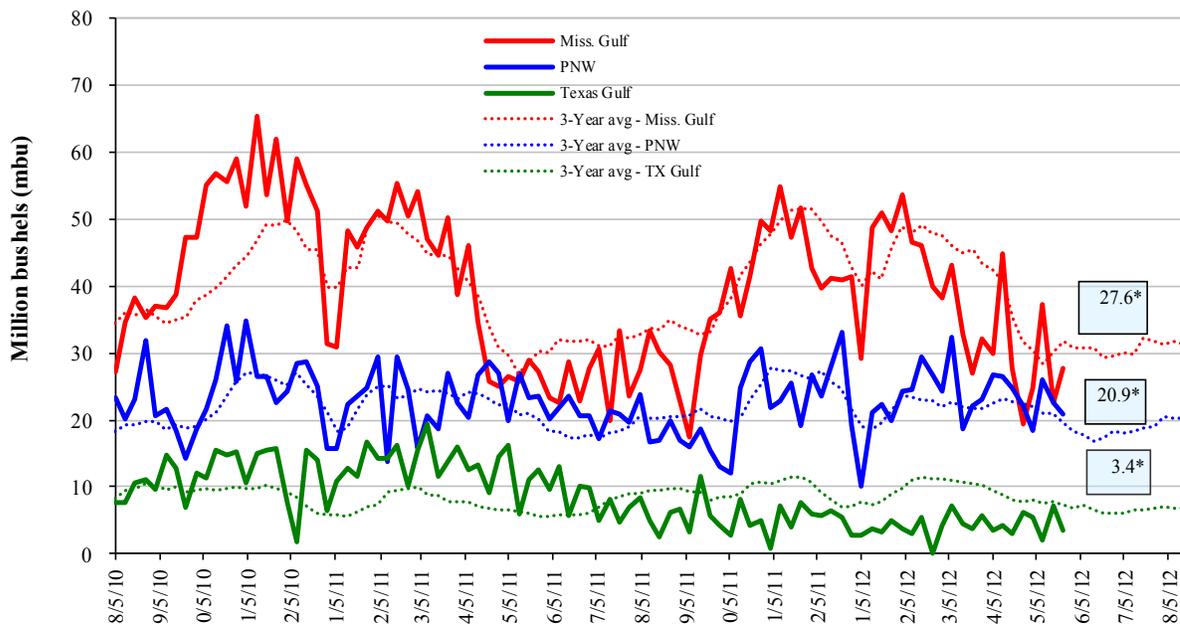


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW¹ (wheat, corn, and soybeans)



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

May 24 % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	up 23	down 53	up 4.2	down 7.5
Last year (same week)	up 2	down 73	down 22	down 11
3-yr avg (4-wk mov. avg.)	down 13	down 54	down 21	up 30

Ocean Transportation

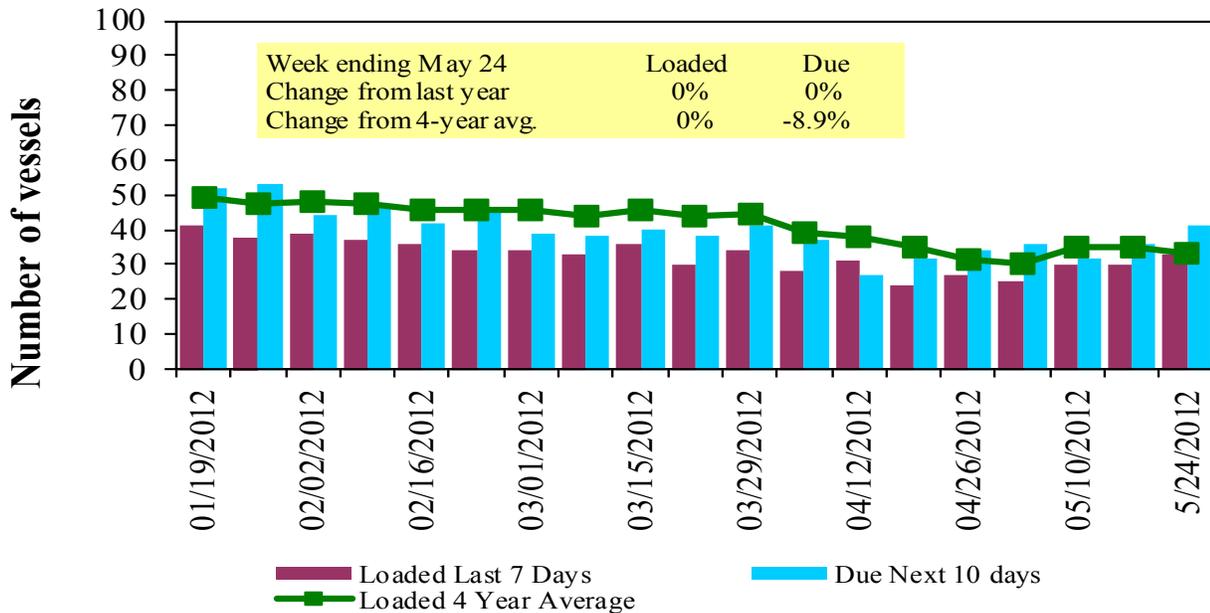
Table 17

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
5/24/2012	16	33	41	7	0
5/17/2012	17	30	36	8	n/a
2011 range	(14..65)	(28..54)	(34..83)	(5..25)	(1..20)
2011 avg.	31	38	53	15	12

Source: Transportation & Marketing Programs/AMS/USDA

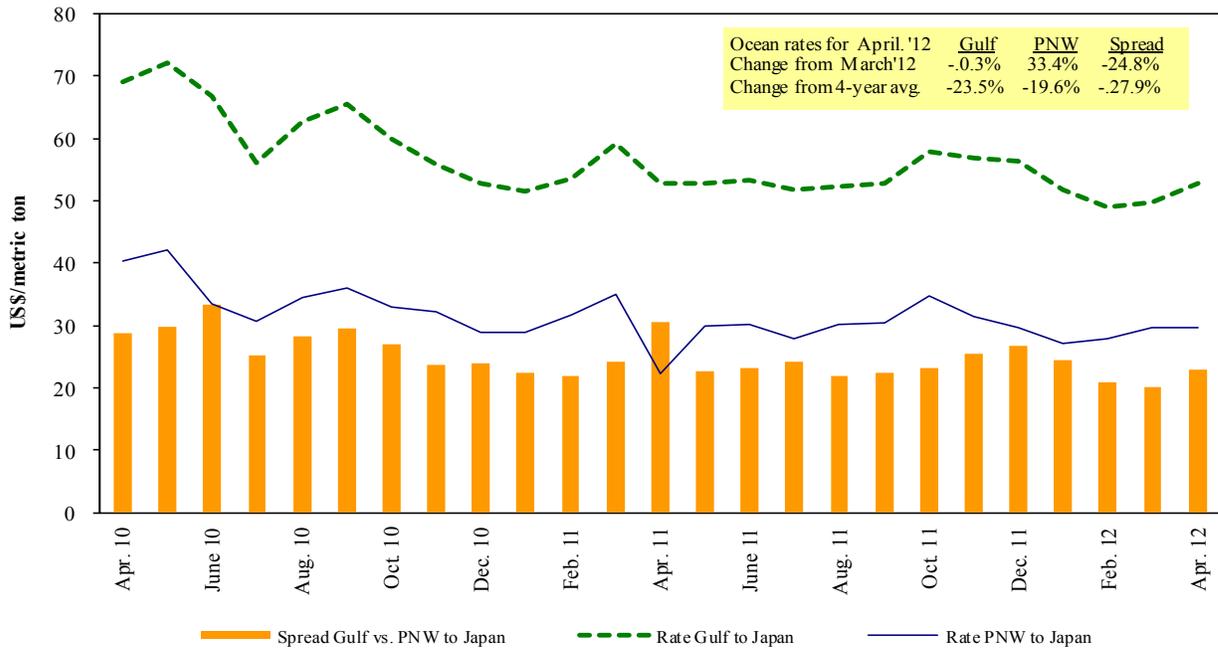
Figure 16
U.S. Gulf^d Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 05/26/2012

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Mar 1/10	50,000	46.65
U.S. Gulf	Korea	Heavy Grain	Mar 1/10	55,000	46.00
U.S. Gulf	Japan	Heavy Grain	Apr 1/10	58,000	46.00
PNW	Djibouti ¹	Wheat	May 5/15	26,430	118.03
PNW	China	Grain	Jan 10/20	55,000	26.75
St. Lawrence	Nigeria	Wheat	Apr 5/15	25,000	45.00
Argentina	Morocco	Barley	Apr 1/10	25,000	39.75
Australia	Vietnam	Grain	Mar 1/10	60,000	19.00
Brazil	Tunisia	Wheat	Feb 14/16	23,750	38.50
Brazil	Taiwan	Heavy Grain	Feb 1/10	65,000	29.50
Brazil	China	Heavy Grain	May 20/30	60,000	47.75
Brazil	China	Heavy Grain	May 1/30	66,000	40.50
Brazil	China	Heavy Grain	Apr 1/10	60,000	47.75
Brazil	China	Heavy Grain	Mar 5/15	60,000	43.00
Brazil	China	Grain	Mar 1/10	55,000	47.00
River Plate	China	Heavy Grain	Feb 20/25	60,000	45.00
River Plate	Egypt Med	Corn	Feb 25/ Mar 5	30,000	39.25
River Plate	Morocco	Corn	Mar 25/30	25,000	35.00
Ukraine	Japan	Corn	Apr 6/15	47,000	47.50

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

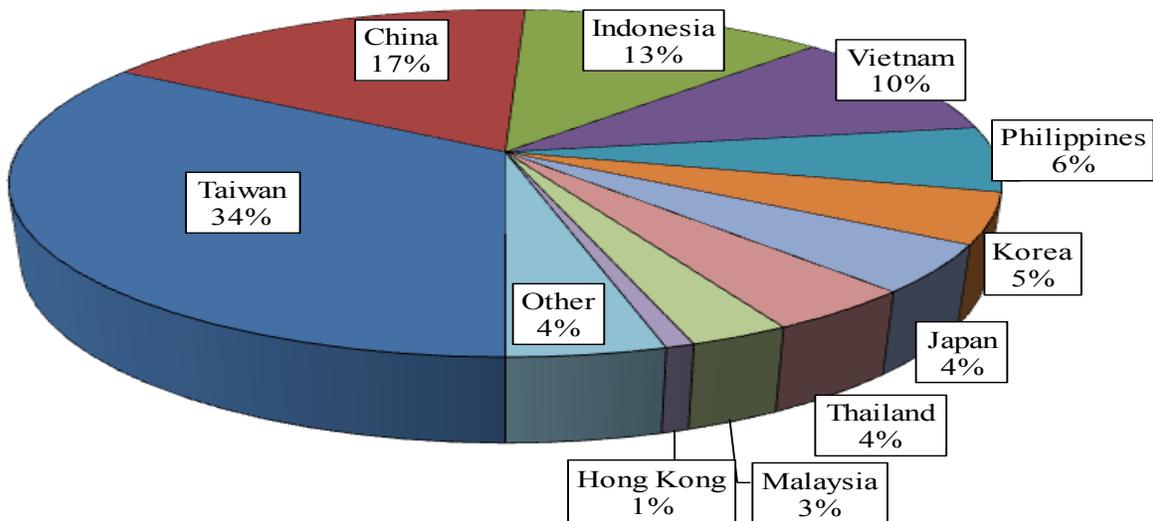
¹75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

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 2011

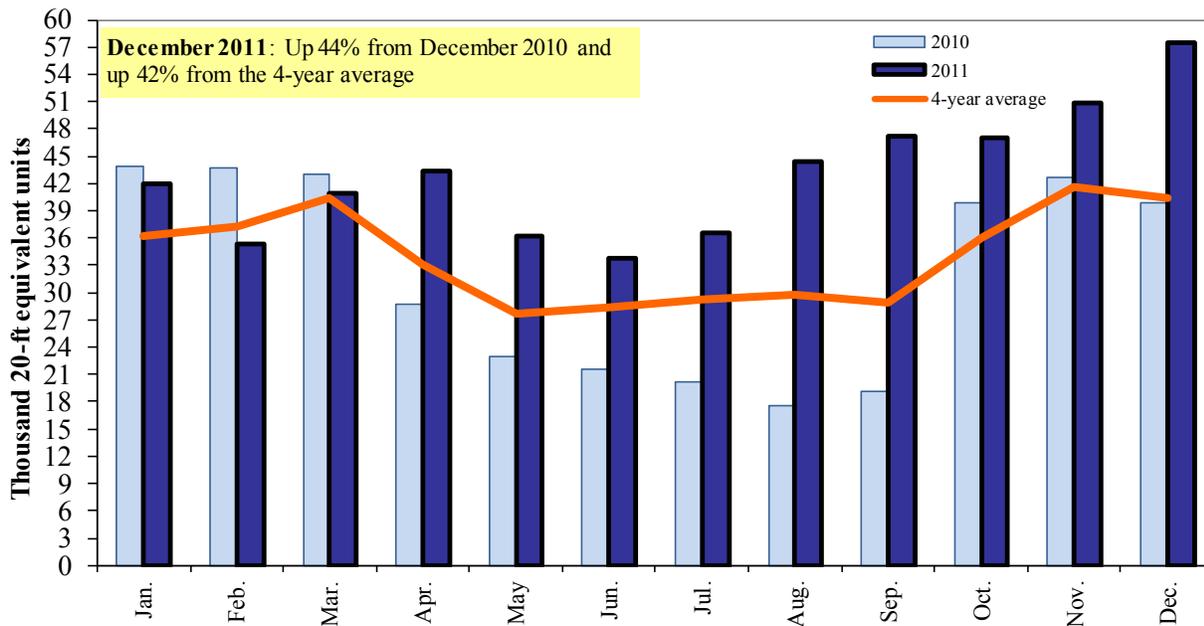


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 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: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

Contacts and Links

Coordinators

Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
Pierre Bahizi	pierre.bahizi@ams.usda.gov	(202) 690 - 0992
Adam Sparger	adam.sparger@ams.usda.gov	(202) 205 - 8701

Weekly Highlight Editors

Marina Denicoff	marina.denicoff@ams.usda.gov	(202) 690 - 3244
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
April Taylor	april.taylor@ams.usda.gov	(202) 295 - 7374
Nicholas Marathon	nick.marathon@ams.usda.gov	(202) 690 - 4430

Grain Transportation Indicators

Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
-------------------------------	--	------------------

Rail Transportation

Marvin Prater	marvin.prater@ams.usda.gov	(202) 720 - 0299
Johnny Hill	johnny.hill@ams.usda.gov	(202) 690 - 3295
Adam Sparger	adam.sparger@ams.usda.gov	(202) 205 - 8701

Barge Transportation

Nicholas Marathon	nick.marathon@ams.usda.gov	(202) 690 - 4430
April Taylor	april.taylor@ams.usda.gov	(202) 295 - 7374

Truck Transportation

April Taylor	april.taylor@ams.usda.gov	(202) 295 - 7374
--------------	--	------------------

Grain Exports

Johnny Hill	johnny.hill@ams.usda.gov	(202) 690 - 3295
Marina Denicoff	marina.denicoff@ams.usda.gov	(202) 690 - 3244

Ocean Transportation

Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
April Taylor (Container movements)	april.taylor@ams.usda.gov	(202) 295 - 7374

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