Agricultural Marketing Service

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WEEKLY HIGHLIGHTS

Decreased Grain Exports Delay Opening of Grain Transloading Terminal

Union Pacific Railroad (UP) has delayed opening its new grain transloading terminal at Yermo, CA, until late 2011 or early 2012. In their announcement, UP said the delay is because of a declining grain export market—grain traffic for all U.S. major railroads was down 14 percent in October compared to October 2010. When UP decided to build the Yermo terminal, the grain export market was growing rapidly, partially because of a ban on export grain in Russia which was lifted last spring. Initially, the Yermo terminal will transload hopper cars of distillers dried grains from the Midwest to containers for export. Later, the terminal will be expanded to handle major grains and other processed grain products.

Upcoming River Closings

Beginning in late November or early December, consistent freezing air temperatures can cause northern portions of the Upper Mississippi River to freeze, accumulate ice, and eventually stop navigation. The U.S. Army Corps of Engineers (Corps) uses the winter as an opportunity for repair and maintenance of many of the aging locks on the river. The Corps has issued notice that Mississippi River Lock 7 (LaCrescent, MN) will be closed from December 5, 2011 to March 12, 2012, for scheduled maintenance. Mississippi River Lock 16 (Muscatine, IL), Lock 17 (New Boston, IL), and Lock 18 (Gladstone, IL) will be closed for maintenance from January 2 through March 2, 2012. One barge company, **AEP River Operations** reports that their last barges will leave Minneapolis-St. Paul, MN, by November 24 and will clear barges above Quincy, IL, (near Lock 21) by December 1. Weather permitting, the Illinois Waterway remains open during the winter and is a year-round source for Mississippi River grain exporters.

Corn Inspections the Highest Since August

For the week ending November 17, corn inspections (.956 mmt) increased 6 percent from the previous week and were at their highest point since the beginning of August (1.00 mmt), caused by increased shipments to Asia. Pacific Northwest corn inspections (.344 mmt) jumped 185 percent from the past week, and were the highest since mid-July (.377 mmt). However, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions at 2.32 million metric tons (mmt) were down 16 percent from the previous week and 20 percent below last year at this time because of a decrease in soybeans and wheat inspections. Outstanding (unshipped) balances of corn remained well above last year (**Table 12**).

Snapshots by Sector

Rail

U.S. railroads originated 21,641 **carloads of grain** during the week ending November 12, up 2 percent from last week, down 18 percent from last year, and 14 percent lower than the 3-year average.

During the week ending November 17, average December non-shuttle **secondary railcar bids/offers** were $14.50 below tariff, up $2 from last week and $16 higher than the prior year. Average shuttle rates were $377 below tariff, up $73 from last week and $115 higher than last year.

Barge

During the week ending November 19, **barge grain movements** totaled 885,693 tons, 28 percent higher than the previous week and 40 percent higher than the same period last year.

During the week ending November 19, 567 grain barges **moved down river**, up 28.6 percent from last week; 840 grain barges were **unloaded in New Orleans**, up 10 percent from the previous week.

Ocean

During the week ending November 17, 38 **ocean-going grain vessels** were loaded in the Gulf, down 33 percent from this week last year. Forty-eight vessels are expected to be loaded within the next 10 days, 9 percent less than the same period last year.

During the week ending November 18, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $57.50 per metric ton (mt), 2 percent more than the previous week. The cost of shipping from the Pacific Northwest to Japan was $32 per mt—3 percent more than the previous week.

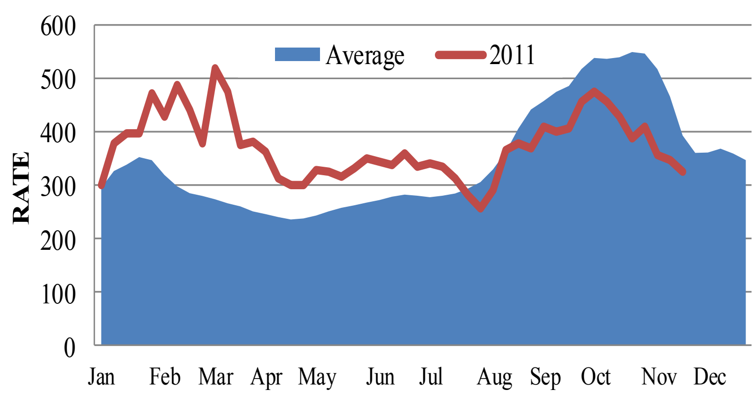
Fuel

During the week ending November 21, U.S. average **diesel fuel prices** were $4.01 per gallon—up 0.6 percent from the previous week and 26 percent higher than the same week last year.

November Grain Barge Rates and Volumes Below Normal

This year's extreme rainfall and snowmelt in the central portions of the country caused record flooding and prolonged periods of high water on the Mississippi River System. Barge companies incur additional operating costs to move barges in the faster currents associated with high water; travel times are increased, more fuel and labor are required, and loading operations may be impaired. Generally, these events cause freight rates to increase. St. Louis, MO, barge rates were above average from January through July when high river levels produced adverse navigation conditions (see figure 1). By late July, river conditions improved and rates dropped below average for the first time this year. As of mid-November, rates have remained below average because of a weak export demand that has moderated the typical harvest rate increases. This year, peak rates occurred in March, as opposed to typical peak fall harvest rates, when the rapid increase in water levels initially disrupted barge operations.

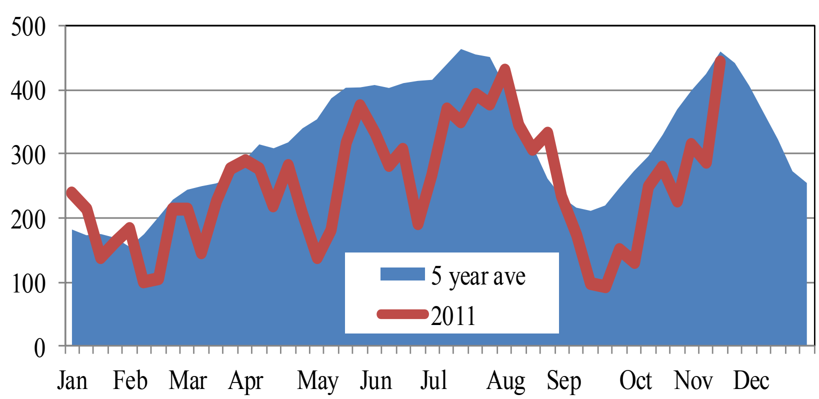
Figure 1 -- Weekly St. Louis Barge Rates, 3-yr. Average and 2011



Rate of 100 equals $3.99 per ton
Source: USDA-AMS-TMP-TSD

For the week ending November 19, the weekly number of downbound grain barges at St. Louis reached a yearly peak of 443, slightly lower than the 5-year average of 460 (see figure 2). The St. Louis barge count has been below average for most of the year. The year-to-date number of barges at St. Louis is 16 percent less than both last year and the 5-year average. Even though barge volumes are down, year-to-date rail deliveries of grain to Mississippi River ports are about the same as last year. Earlier this year, rail deliveries were significantly higher than average. During March rail deliveries peaked for the year at 1,706 cars per week when flood conditions disrupted river operations and barge rates were at their highest. For this month, rail deliveries to Mississippi River ports are averaging 380 cars per week compared to last November's average of 1,775 cars per week. For the remainder of the marketing year, a robust barge market is not likely; USDA projects U.S. corn exports at 1.6 billion bushels, a 9 year low. Nick.Marathon@ams.usda.gov

Figure 2 -- Weekly downbound barges, St. Louis, 5-year average and 2011



Source: US Army Corps of Engineers

Grain Transportation Indicators

Table 1
Grain Transport Cost Indicators[1]

	Truck	Rail[2]	Barge	Ocean	
Week ending				Gulf	Pacific
11/23/11	269	81	235	257	227
11/16/11	268	79	246	253	220

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

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

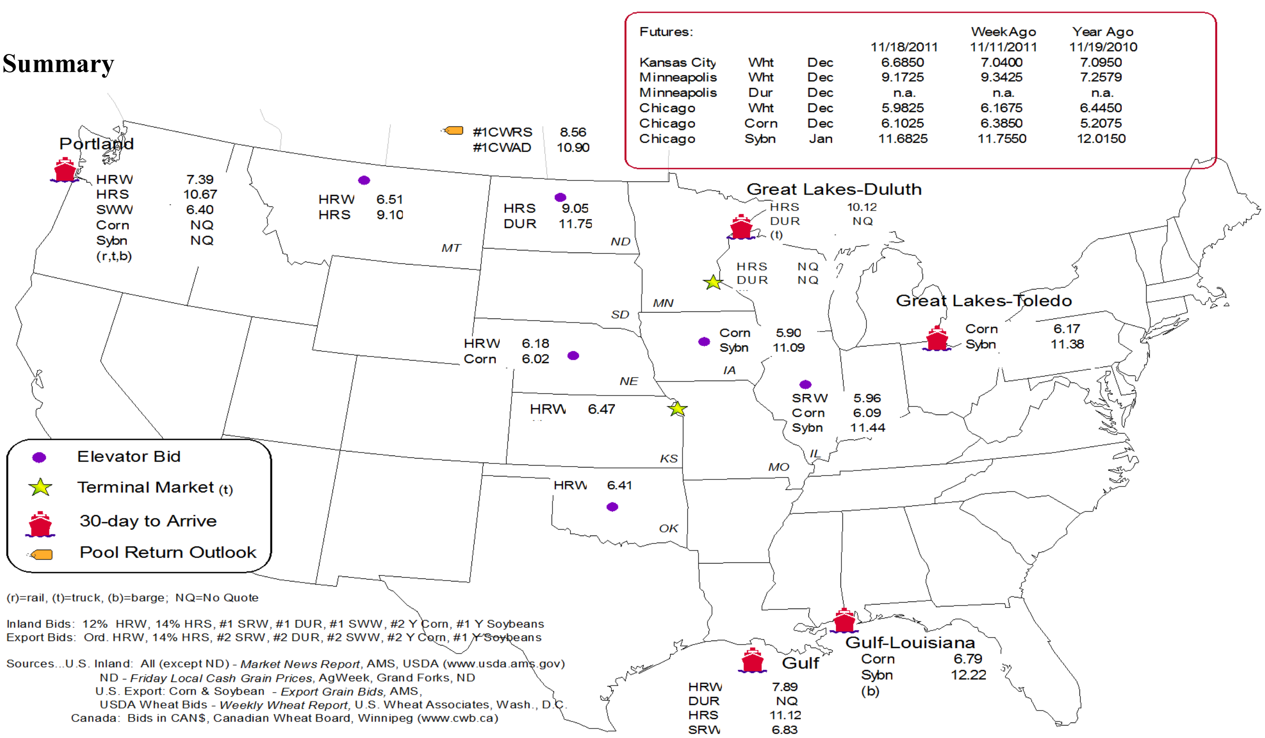
Table 2
Market Update: U.S. Origins to Export Position Price Spreads ($/bushel)

Commodity	Origin--Destination	11/18/20111	11/11/20111
Corn	IL--Gulf	-0.70	-0.71
Corn	NE--Gulf	-0.77	-0.81
Soybean	IA--Gulf	-1.13	-1.20
HRW	KS--Gulf	-1.42	-1.45
HRS	ND--Portland	-1.62	-1.66

Note: nq = no quote
Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 1
Grain bid Summary



Rail Transportation

Table 3

Rail Deliveries to Port (carloads)[1]

Week ending	Mississippi Gulf	Texas Gulf	Cross-Border Mexico	Pacific Northwest	Atlantic & East Gulf	Total
11/16/2011[p]	76	639	1,298	3,122	732	5,867
11/09/2011[r]	532	287	1,006	3,670	857	6,352
2011 YTD	26,540	73,125	43,471	158,070	20,883	322,089
2010 YTD	26,520	71,959	38,500	155,304	27,628	319,911
2011 YTD as % of 2010 YTD	100	102	113	102	76	101
Last 4 weeks as % of 2010[2]	29	17	178	78	62	62
Last 4 weeks as % of 4-year avg.[2]	29	16	143	77	70	61
Total 2010	33,971	83,492	42,794	177,896	32,780	370,933
Total 2009	33,423	57,646	36,738	175,965	30,328	334,100

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2010 and prior 4-year average.

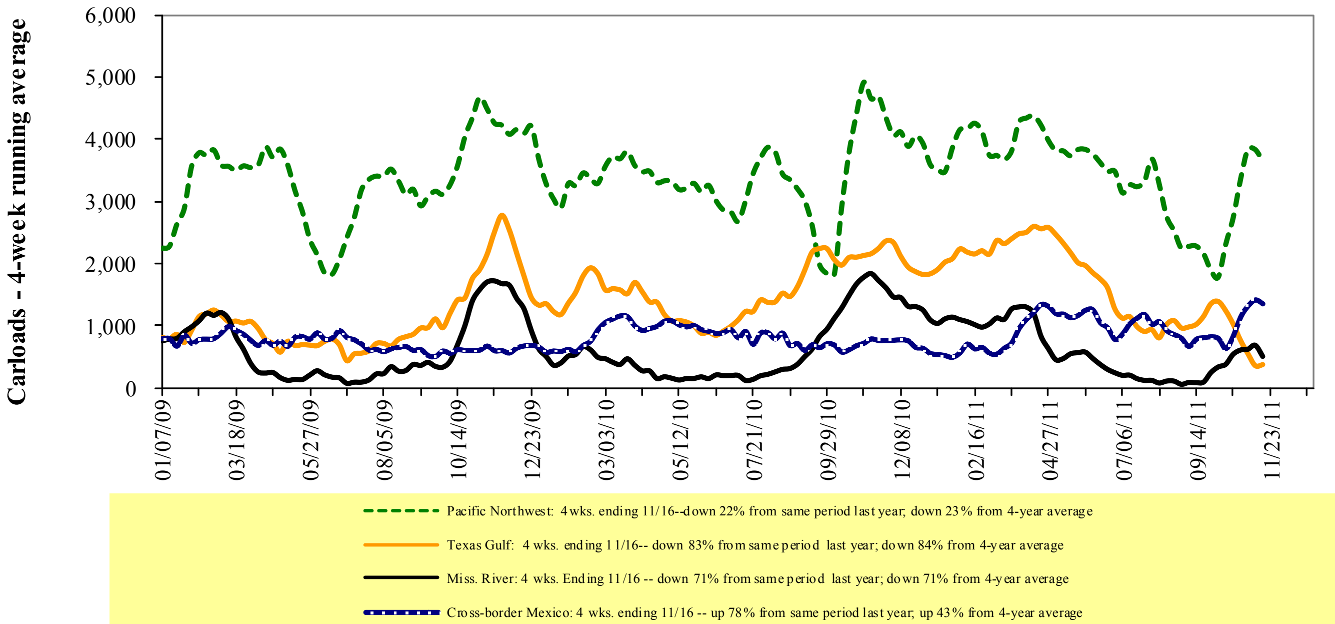
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

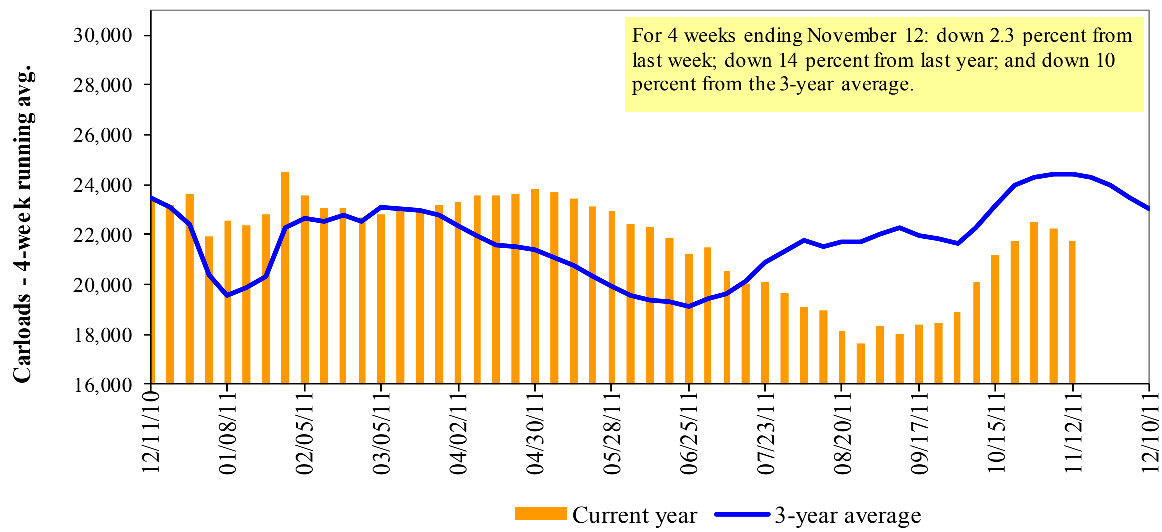
	East		West			U.S. total	Canada	
Week ending	**CSXT**	**NS**	**BNSF**	**KCS**	**UP**		**CN**	**CP**
11/12/11	2,687	2,900	11,092	399	4,563	21,641	3,812	5,286
This week last year	2,701	3,441	12,723	664	6,805	26,334	4,501	5,515
2011 YTD	82,579	130,937	471,608	31,640	258,236	975,000	173,603	230,621
2010 YTD	96,515	137,727	471,233	31,488	254,427	991,390	175,714	232,441
2011 YTD as % of 2010 YTD	86	95	100	100	101	98	99	99
Last 4 weeks as % of 2010[1]	98	90	86	107	74	85	99	111
Last 4 weeks as % of 3-yr avg.[1]	93	91	91	86	81	88	97	101
Total 2010	111,935	159,836	546,901	35,807	295,361	1,149,840	203,038	265,835

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

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

Figure 3

Total Weekly U.S. Class I Railroad Grain Car Loadings



Source: Association of American Railroads

Table 5

Railcar Auction Offerings[1] (\$/car)[2]

Week ending	Delivery period							
11/17/2011	**Dec-11**	**Dec-10**	**Jan-12**	**Jan-11**	**Feb-12**	**Feb-11**	**Mar-12**	**Mar-11**
BNSF[3]								
COT grain units	no bids	no bids	0	1	0	no bids	no bids	0
COT grain single-car[5]	0 . . 10	0	0 . . 10	5	0	5	0	no bids
UP[4]								
GCAS/Region 1	no bids	no bids	no bids	no bids	no offer	1	n/a	n/a
GCAS/Region 2	no bids	no bids	no bids	no bids	no offer	no bids	n/a	n/a

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

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

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

[4]UP - GCAS = Grain Car Allocation System

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

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

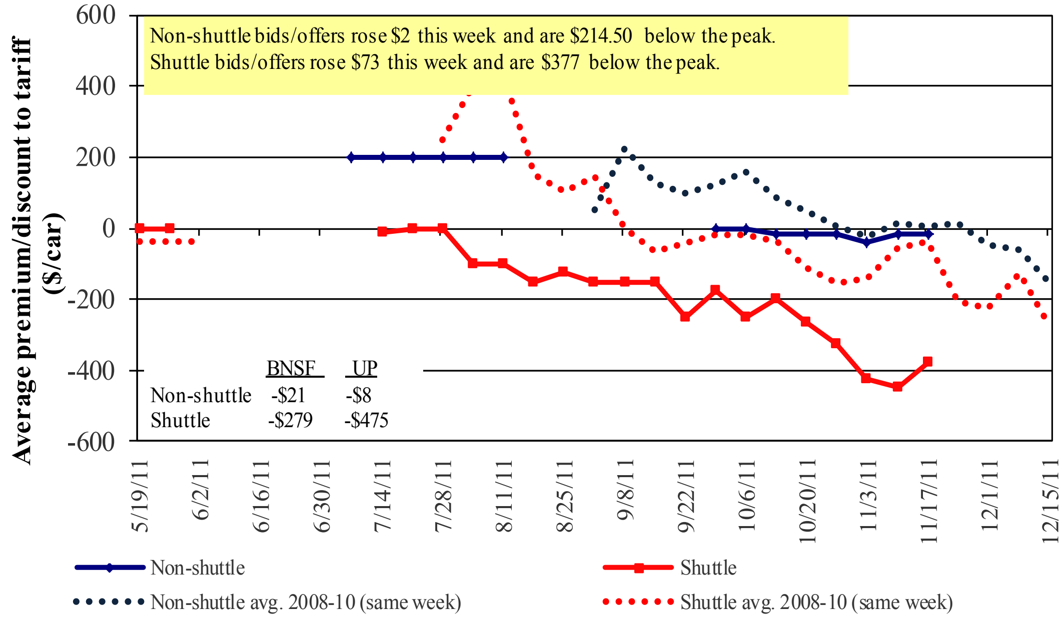
[5]Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

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

Figure 4

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

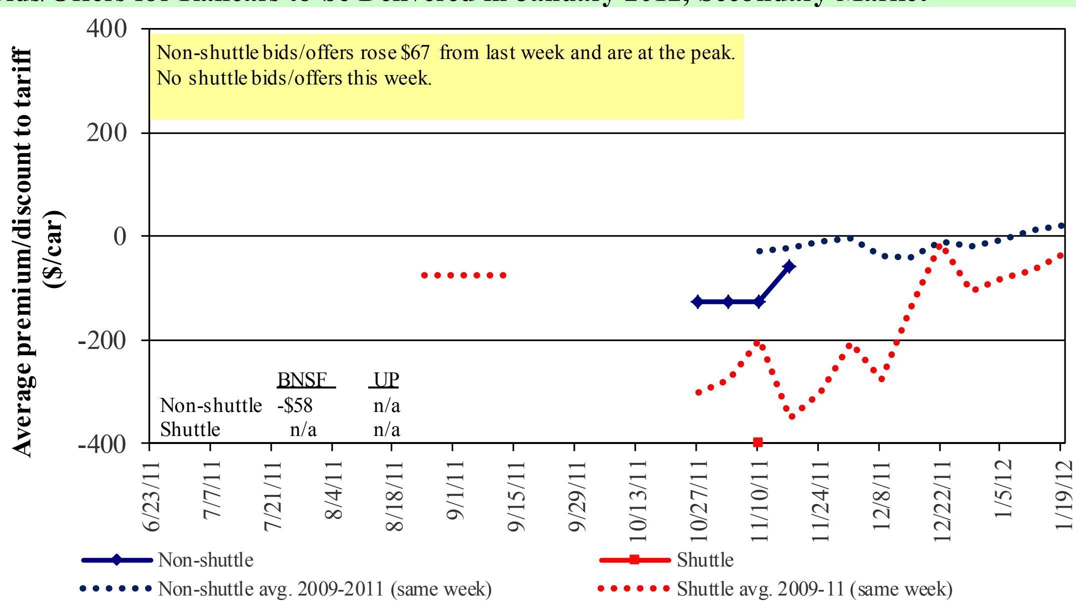


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

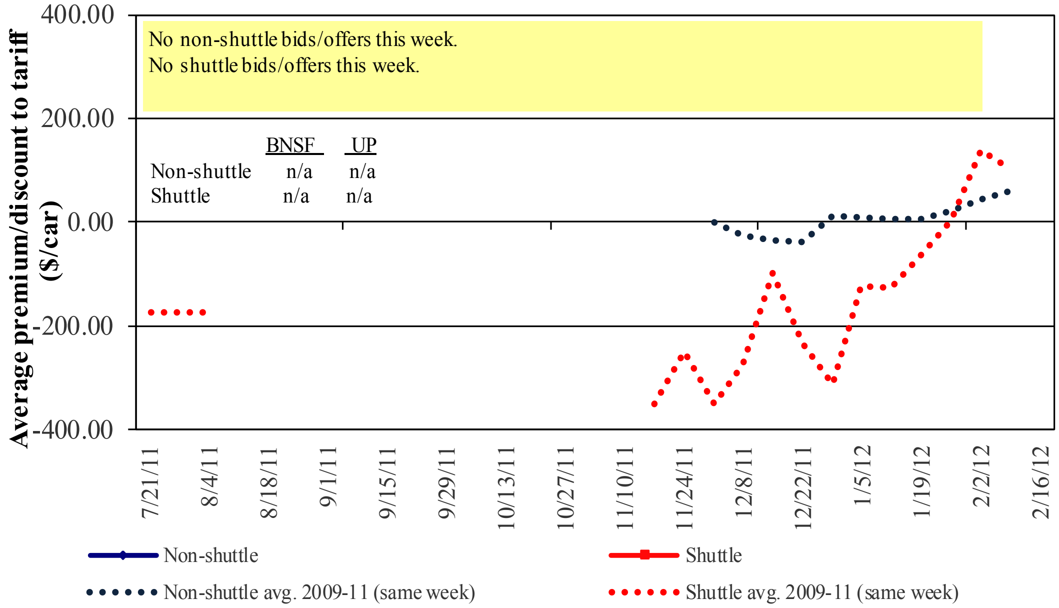


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in February 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					
11/17/2011	**Dec-11**	**Jan-12**	**Feb-12**	**Mar-12**	**Apr-12**	**May-12**
Non-shuttle						
BNSF-GF	(21)	(58)	n/a	n/a	n/a	n/a
Change from last week	(13)	67	n/a	n/a	n/a	n/a
Change from same week 2010	(4)	(83)	n/a	n/a	n/a	n/a
UP-Pool	(8)	n/a	n/a	n/a	n/a	n/a
Change from last week	17	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	36	n/a	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	(279)	n/a	n/a	n/a	n/a	n/a
Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	230	n/a	n/a	n/a	n/a	n/a
UP-Pool	(475)	n/a	n/a	n/a	n/a	n/a
Change from last week	(25)	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	-	n/a	n/a	n/a	n/a	n/a

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

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

Table 7

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

Effective date: 11/7/2011	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[3]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$2,992	$177	$31.47	$0.86	11
	Grand Forks, ND	Duluth-Superior, MN	$3,097	$101	$31.76	$0.86	19
	Wichita, KS	Los Angeles, CA	$5,710	$520	$61.87	$1.68	9
	Wichita, KS	New Orleans, LA	$3,492	$312	$37.77	$1.03	11
	Sioux Falls, SD	Galveston-Houston, TX	$5,410	$427	$57.96	$1.58	6
	Northwest KS	Galveston-Houston, TX	$3,760	$341	$40.73	$1.11	11
	Amarillo, TX	Los Angeles, CA	$3,959	$475	$44.03	$1.20	12
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,062	$352	$33.90	$0.92	14
	Toledo, OH	Raleigh, NC	$3,942	$398	$43.10	$1.17	9
	Des Moines, IA	Davenport, IA	$1,934	$75	$19.95	$0.54	7
	Indianapolis, IN	Atlanta, GA	$3,381	$299	$36.54	$0.99	10
	Indianapolis, IN	Knoxville, TN	$2,833	$192	$30.04	$0.82	6
	Des Moines, IA	Little Rock, AR	$3,074	$219	$32.70	$0.89	8
	Des Moines, IA	Los Angeles, CA	$4,985	$638	$55.84	$1.52	20
Soybeans	Minneapolis, MN	New Orleans, LA	$3,349	$387	$37.10	$1.01	7
	Toledo, OH	Huntsville, AL	$3,057	$283	$33.17	$0.90	9
	Indianapolis, IN	Raleigh, NC	$4,013	$401	$43.83	$1.19	9
	Indianapolis, IN	Huntsville, AL	$2,749	$192	$29.20	$0.79	8
	Champaign-Urbana, IL	New Orleans, LA	$3,406	$352	$37.32	$1.02	13
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,239	$299	$35.14	$0.96	9
	Wichita, KS	Galveston-Houston, TX	$3,144	$233	$33.53	$0.91	7
	Chicago, IL	Albany, NY	$3,645	$374	$39.91	$1.09	9
	Grand Forks, ND	Portland, OR	$4,702	$517	$51.83	$1.41	9
	Grand Forks, ND	Galveston-Houston, TX	$5,745	$538	$62.40	$1.70	10
	Northwest KS	Portland, OR	$4,727	$560	$52.50	$1.43	11
Corn	Minneapolis, MN	Portland, OR	$4,800	$629	$53.92	$1.47	13
	Sioux Falls, SD	Tacoma, WA	$4,760	$576	$52.99	$1.44	13
	Champaign-Urbana, IL	New Orleans, LA	$2,877	$352	$32.07	$0.87	13
	Lincoln, NE	Galveston-Houston, TX	$3,310	$336	$36.21	$0.99	10
	Des Moines, IA	Amarillo, TX	$3,430	$275	$36.80	$1.00	7
	Minneapolis, MN	Tacoma, WA	$4,800	$624	$53.87	$1.47	13
	Council Bluffs, IA	Stockton, CA	$4,200	$646	$48.12	$1.31	13
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,040	$576	$55.77	$1.52	11
	Minneapolis, MN	Portland, OR	$5,030	$629	$56.20	$1.53	12
	Fargo, ND	Tacoma, WA	$4,930	$512	$54.05	$1.47	11
	Council Bluffs, IA	New Orleans, LA	$3,710	$406	$40.87	$1.11	11
	Toledo, OH	Huntsville, AL	$2,672	$283	$29.34	$0.80	10
	Grand Island, NE	Portland, OR	$4,520	$573	$50.58	$1.38	8

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

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

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

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

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

Table 8

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

Effective date: 11/7/2011 Commodity	Origin state	Destination region	Tariff rate/car[1]	Fuel surcharge per car[2]	Tariff plus surcharge per: metric ton[3]	bushel[3]	Percent change Y/Y[4]
Wheat	MT	Chihuahua, CI	$7,741	$547	$84.68	$2.30	12
	OK	Cuautitlan, EM	$6,804	$573	$75.37	$2.05	12
	KS	Guadalajara, JA	$7,411	$848	$84.39	$2.29	10
	TX	Salinas Victoria, NL	$3,753	$233	$40.73	$1.11	11
Corn	IA	Guadalajara, JA	$7,699	$860	$87.45	$2.22	10
	SD	Penjamo, GJ	$7,776	$715	$86.76	$2.20	14
	NE	Queretaro, QA	$7,048	$739	$79.57	$2.02	15
	SD	Salinas Victoria, NL	$5,650	$544	$63.28	$1.61	13
	MO	Tlalnepantla, EM	$6,227	$721	$70.99	$1.80	17
	SD	Torreon, CU	$6,522	$599	$72.76	$1.85	12
Soybeans	MO	Bojay (Tula), HG	$6,986	$753	$79.07	$2.15	14
	NE	Guadalajara, JA	$7,904	$860	$89.55	$2.43	17
	IA	El Castillo, JA[5]	$8,255	$711	$91.61	$2.49	18
	KS	Torreon, CU	$6,396	$586	$71.34	$1.94	18
Sorghum	OK	Cuautitlan, EM	$5,885	$543	$65.68	$1.67	19
	TX	Guadalajara, JA	$6,653	$465	$72.73	$1.85	14
	NE	Penjamo, GJ	$7,446	$805	$84.30	$2.14	15
	KS	Queretaro, QA	$6,353	$508	$70.10	$1.78	14
	NE	Salinas Victoria, NL	$5,103	$483	$57.07	$1.45	16
	NE	Torreon, CU	$6,068	$622	$68.36	$1.73	12

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

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

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

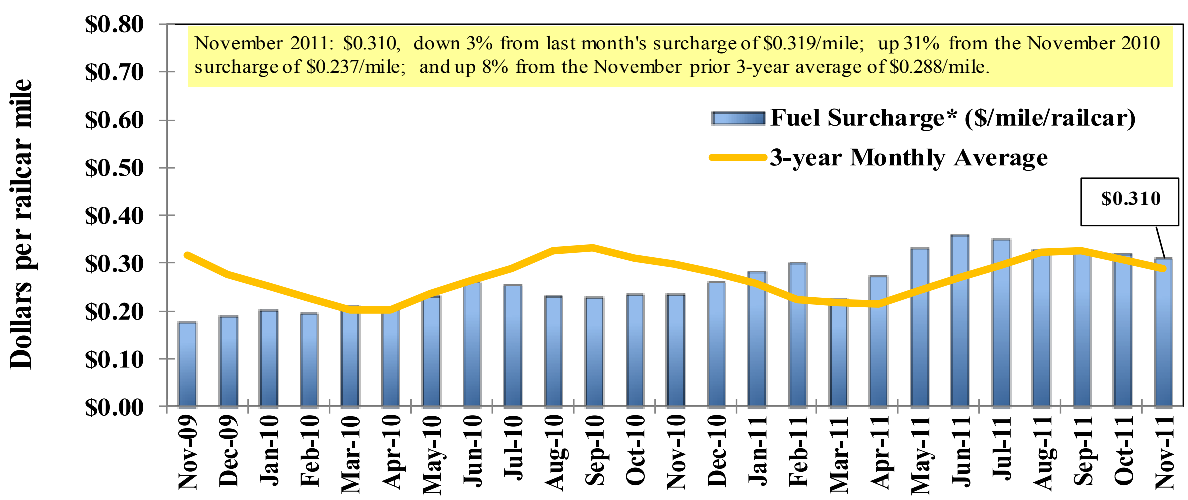
[4]Percentage change year over year calculated using tariff rate plus fuel surchage

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

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average[1]



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

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

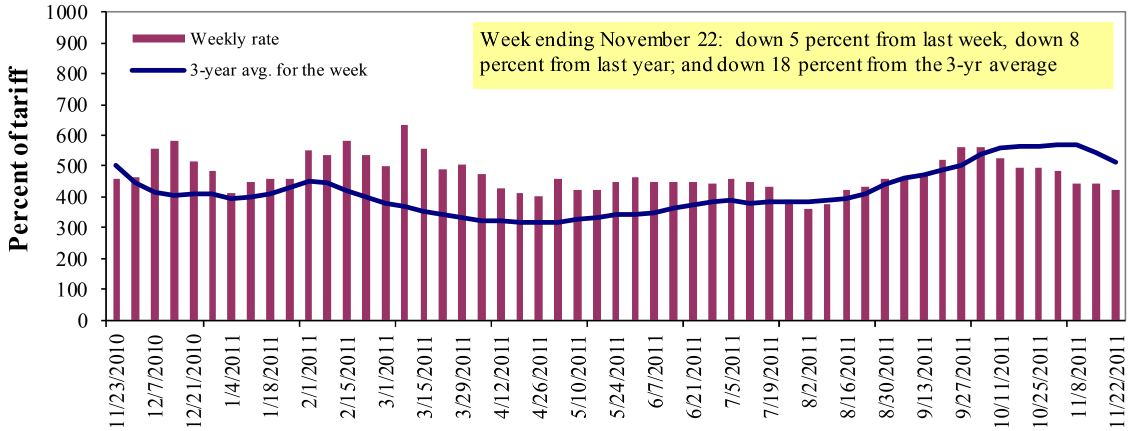
** BNSF strike price (diesel price when fuel surcharges begin) changed from $1.25/gal. to $2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was $0.227/mile instead of $0.331/mile.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate[1,2]



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	11/22/2011	--	423	423	312	418	418	275
	11/15/2011	477	440	443	347	460	460	300
$/ton	11/22/2011	--	22.50	19.63	12.45	19.60	16.89	8.64
	11/15/2011	29.53	23.41	20.56	13.85	21.57	18.58	9.42
Current week % change from the same week:								
	Last year	--	-4	-8	-16	3	3	-19
	3-year avg. [2]	--	-16	-18	-33	-12	-12	-36
Rate[1]	December	--	--	425	300	395	395	275
	February	--	--	428	295	395	395	273

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

Source: Transportation & Marketing Programs/AMS/USDA

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

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

Figure 9

Benchmark tariff rates

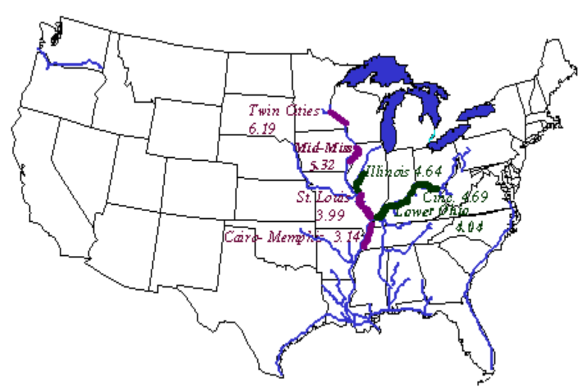
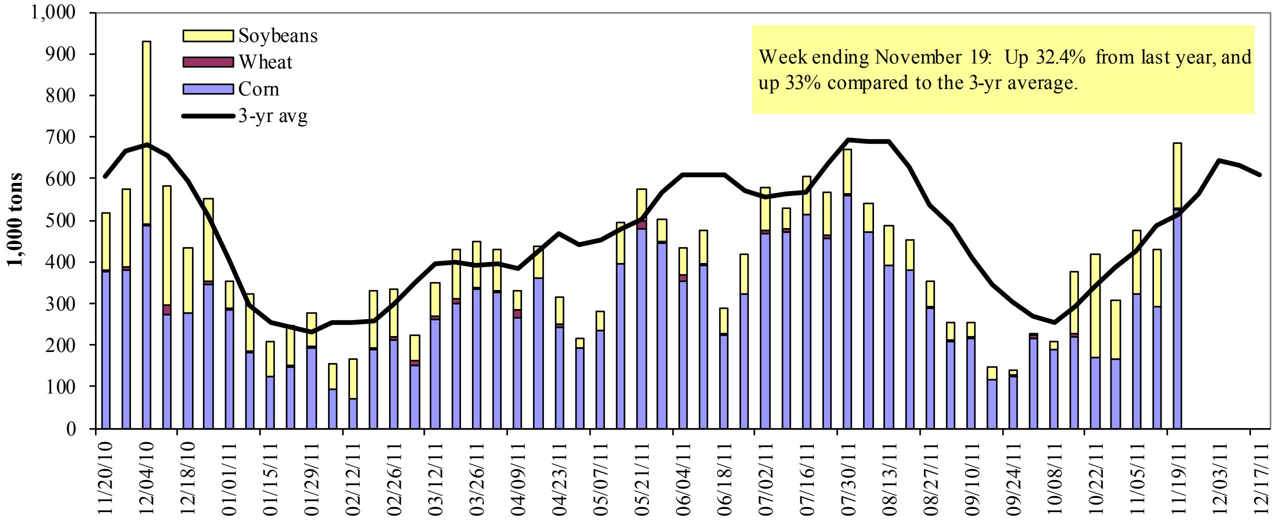


Figure 10

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



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

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

Table 10

Barge Grain Movements (1,000 tons)

Week ending 11/19/2011	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	373	3	92	3	471
Winfield, MO (L25)	463	6	153	3	625
Alton, IL (L26)	635	3	177	5	820
Granite City, IL (L27)	525	3	158	2	688
Illinois River (L8)	183	0	13	0	196
Ohio River (L52)	61	7	93	2	162
Arkansas River (L1)	3	7	22	3	35
Weekly total - 2011	589	17	274	6	886
Weekly total - 2010	414	7	181	31	633
2011 YTD[1]	16,769	1,330	6,842	359	25,301
2010 YTD	20,375	1,095	8,157	431	30,058
2011 as % of 2010 YTD	82	121	84	83	84
Last 4 weeks as % of 2010[2]	110	155	101	75	106
Total 2010	22,768	1,220	10,373	481	34,841

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

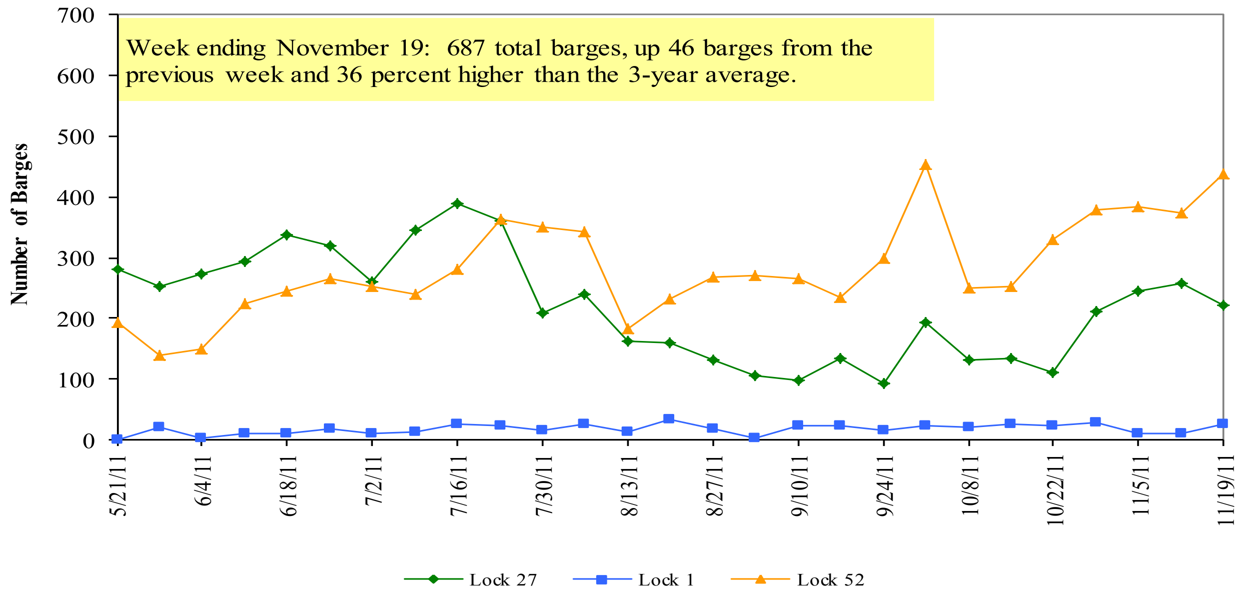
[2] As a percent of same period in 2010.

Note: Total may not add exactly, due to rounding

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

Figure 11

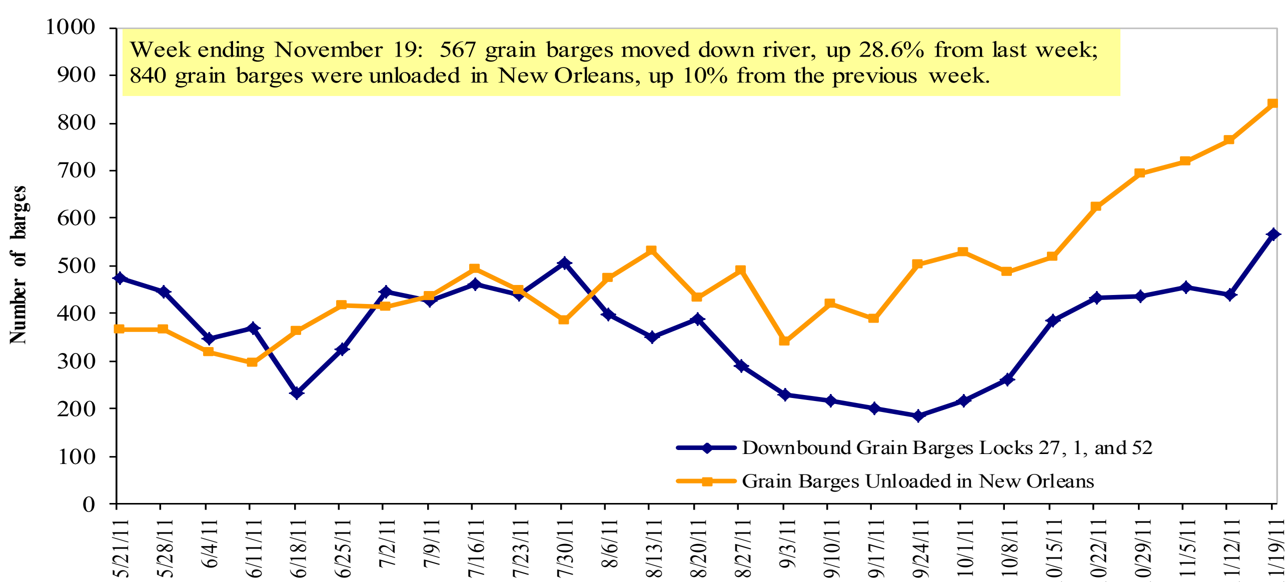
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



Source: U.S. Army Corps of Engineers

Figure 12

Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices[1], Week Ending 11/21/2011 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.984	0.020	0.812
	New England	4.056	0.026	0.821
	Central Atlantic	4.100	0.015	0.807
	Lower Atlantic	3.918	0.012	0.803
II	Midwest[2]	4.010	0.023	0.854
III	Gulf Coast[3]	3.903	0.021	0.816
IV	Rocky Mountain	4.144	0.051	0.879
V	West Coast	4.191	0.020	0.875
	California	4.271	0.001	0.931
Total	U.S.	4.010	0.023	0.839

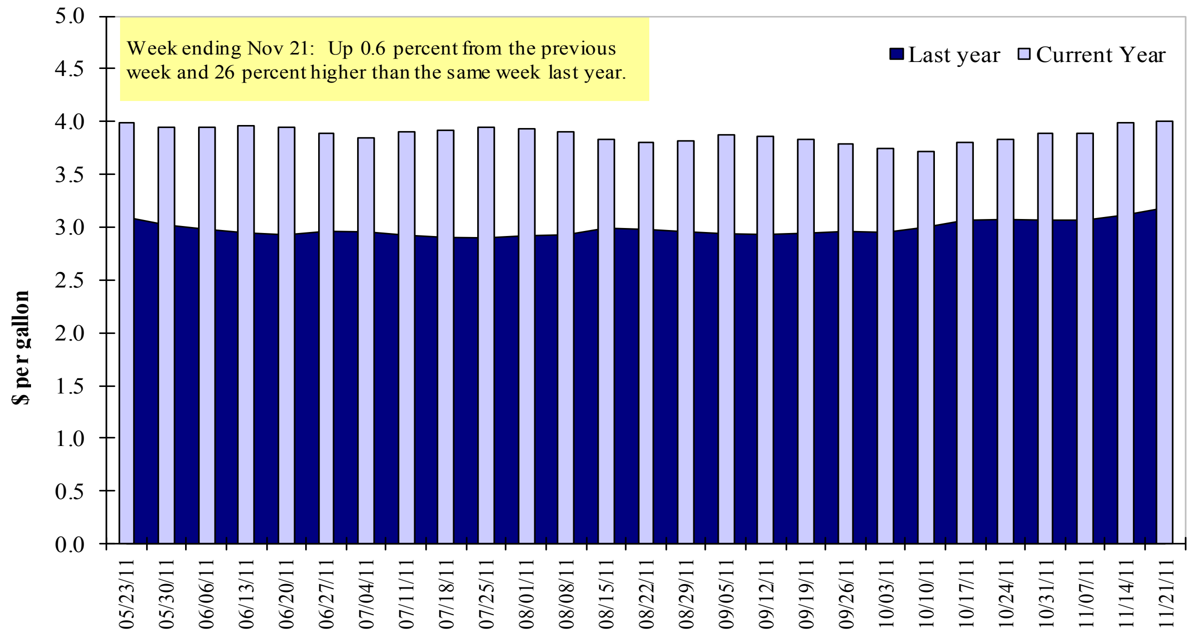
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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

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

Figure 13

Weekly Diesel Fuel Prices, U.S. Average



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

Grain Exports

Table 12

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

	Wheat						Corn	Soybeans	Total
Week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances [1]									
11/10/2011	1,434	689	1,103	877	64	4,167	14,305	11,879	30,351
This week year ago	3,801	596	2,646	1,246	157	8,444	12,375	18,843	39,662
Cumulative exports-marketing year [2]									
2011/12 YTD	5,176	1,701	3,262	2,227	271	12,637	7,245	7,994	27,876
2010/11 YTD	6,236	913	3,546	2,143	512	13,349	8,912	11,905	34,166
YTD 2011/12 as % of 2010/11	83	186	92	104	53	95	81	67	82
Last 4 wks as % of same period 2010/11	36	122	44	75	41	50	122	69	81
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 Importers[1] of U.S. Corn

Week ending 11/10/11	**Total Commitments**[2]		**% change current MY from last MY**	**Exports**[3]
	2011/12 Current MY	**2010/11 Last MY**		**2010/11**
	- 1,000 mt -			- 1,000 mt -
Japan	5,056	6,293	(20)	14,279
Mexico	4,126	3,158	31	7,019
Korea	1,992	2,229	(11)	6,104
Egypt	328	1,424	(77)	3,302
Taiwan	785	914	(14)	2,393
Top 5 importers	**12,286**	**14,017**	**(12)**	**33,096**
Total US corn export sales	**21,550**	**21,287**	**1**	**46,610**
% of Projected	53%	46%		
Change from Last Week	209	534		
Top 5 importers' share of U.S. corn export sales	57%	66%		
USDA forecast, November 2011	**40,712**	**46,692**	**(13)**	
Corn Use for Ethanol USDA forecast, Ethanol November 2011	**127,000**	**127,534**	**(0)**	

(n) indicates negative number.

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

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

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

Table 14

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

Week Ending 11/10/2011	**Total Commitments[2] 2011/12 Current MY**	**2010/11 Last MY**	**% change current MY from last MY**	**Exports[3] 2010/11**
	- 1,000 mt -			- 1,000 mt -
China	13,820	19,051	(27)	24,445
Mexico	1,258	1,395	(10)	3,215
Japan	783	1,193	(34)	1,887
EU-25	143	809	(82)	2,607
Indonesia	466	662	(30)	1,397
Top 5 importers	**16,470**	**23,110**	**(29)**	**33,551**
Total US soybean export sales	**19,872**	**30,748**	**(35)**	**40,690**
% of Projected	55%	75%		
Change from last week	746	1,008		
Top 5 importers' share of U.S. soybean export sales	83%	75%		
USDA forecast, November 2011	**36,104**	**40,899**	**(12)**	
Soybean Use for Biodiesel USDA forecast, November 2011	**8,632**	**6,115**	**41**	

(n) indicates negative number.

[1]Based on FAS 2008/09 Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

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

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

Table 15

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

Week Ending 11/10/2011	**Total Commitments[2] 2011/12 Current MY**	**2010/11 Last MY**	**% change current MY from last MY**	**Exports[3] 2010/11**
	- 1,000 mt -			- 1,000 mt -
Nigeria	1,947	2,018	(4)	3,233
Japan	2,211	2,200	0	3,148
Mexico	2,254	1,849	22	2,601
Philippines	1,493	1,663	(10)	1,518
Korea	763	1,094	(30)	1,111
Peru	544	678	(20)	923
Taiwan	499	544	(8)	913
Colombia	403	439	(8)	783
Indonesia	473	381	24	781
Yemen	272	296		659
Top 10 importers	**10,857**	**11,161**	**(3)**	**15,670**
Total US wheat export sales	**16,803**	**21,793**	**(23)**	**33,439**
% of Projected	63%	62%		
Change from last week	317	943		
Top 10 importers' share of U.S. wheat export sales	65%	51%		
USDA forecast, November 2011	**26,567**	**35,123**	**(24)**	

(n) indicates negative number.

[1] Modified from the FAS **2010/11** Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.

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

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

Table 16

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

Port regions	Week ending 11/17/11	Previous Week[1]	Current Week as % of Previous	2011 YTD[1]	2010 YTD[1]	2011 YTD as % of 2010 YTD	Last 4-weeks as % of 2010	Last 4-weeks as % of 3-yr. avg.	Total[1] 2010
Pacific Northwest									
Wheat	150	174	86	12,679	9,826	129	129	130	11,062
Corn	344	121	285	7,724	8,951	86	119	134	9,950
Soybeans	120	316	38	6,074	8,554	71	62	63	10,191
Total	**614**	**611**	**101**	**26,477**	**27,331**	**97**	**86**	**90**	**31,203**
Mississippi Gulf									
Wheat	42	68	62	4,679	3,567	131	108	74	4,199
Corn	480	466	103	23,190	26,673	87	90	102	29,794
Soybeans	734	923	79	15,901	18,096	88	84	98	22,519
Total	**1,256**	**1,458**	**86**	**43,769**	**48,335**	**91**	**87**	**97**	**56,512**
Texas Gulf									
Wheat	104	89	117	10,168	8,296	123	43	58	9,339
Corn	5	52	9	889	1,681	53	28	38	1,859
Soybeans	0	51	0	814	1,488	55	10	11	1,916
Total	**109**	**192**	**57**	**11,872**	**11,465**	**104**	**30**	**37**	**13,115**
Interior									
Wheat	20	41	48	1,030	813	127	65	177	926
Corn	128	256	50	6,530	5,811	112	80	168	6,388
Soybeans	82	86	96	3,786	3,214	118	102	111	3,641
Total	**229**	**383**	**60**	**11,346**	**9,838**	**115**	**109**	**146**	**10,954**
Great Lakes									
Wheat	0	35	0	935	1,601	58	37	51	1,897
Corn	0	0	n/a	159	100	159	0	0	119
Soybeans	27	0	n/a	260	486	53	79	76	655
Total	**27**	**35**	**78**	**1,354**	**2,187**	**62**	**55**	**62**	**2,672**
Atlantic									
Wheat	0	1	0	659	314	210	15	23	343
Corn	0	6	0	259	441	59	56	56	469
Soybeans	89	96	92	728	1,076	68	75	106	1,417
Total	**89**	**104**	**86**	**1,646**	**1,831**	**90**	**65**	**89**	**2,229**
U.S. total from ports[2]									
Wheat	316	407	78	30,149	24,417	123	80	89	27,765
Corn	956	901	106	38,751	43,656	89	102	113	48,580
Soybeans	1,052	1,473	71	27,563	32,914	84	73	82	40,340
Total	**2,324**	**2,782**	**84**	**96,463**	**100,988**	**96**	**82**	**91**	**116,684**

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

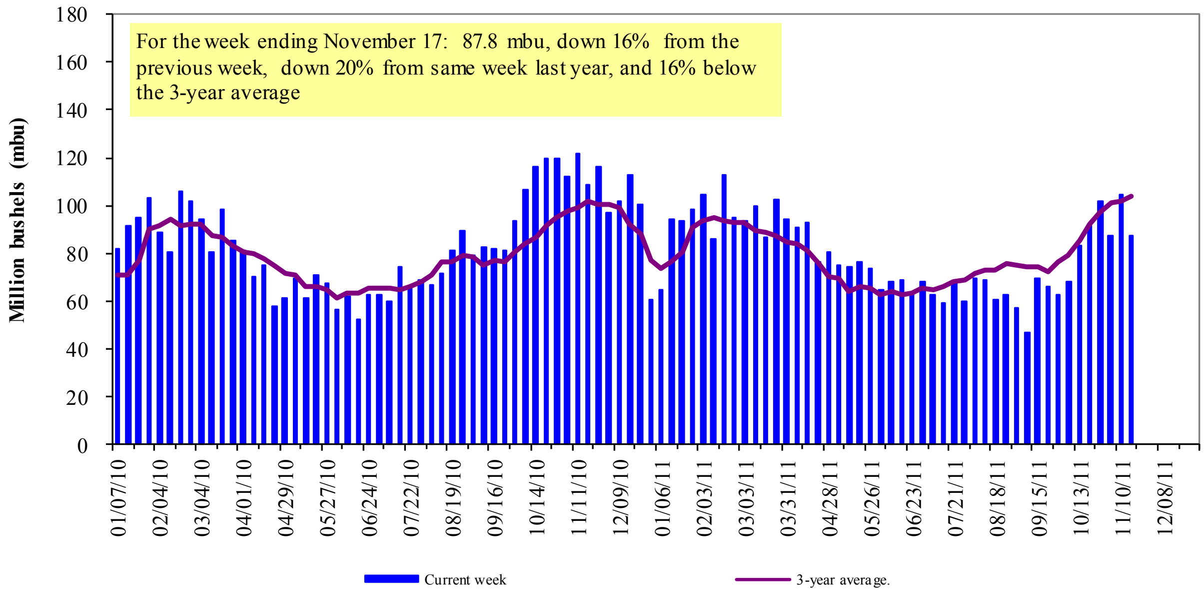
[2] Total includes only port regions shown above; Interior land-based shipments now included.

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 61 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2010.

Figure 14

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

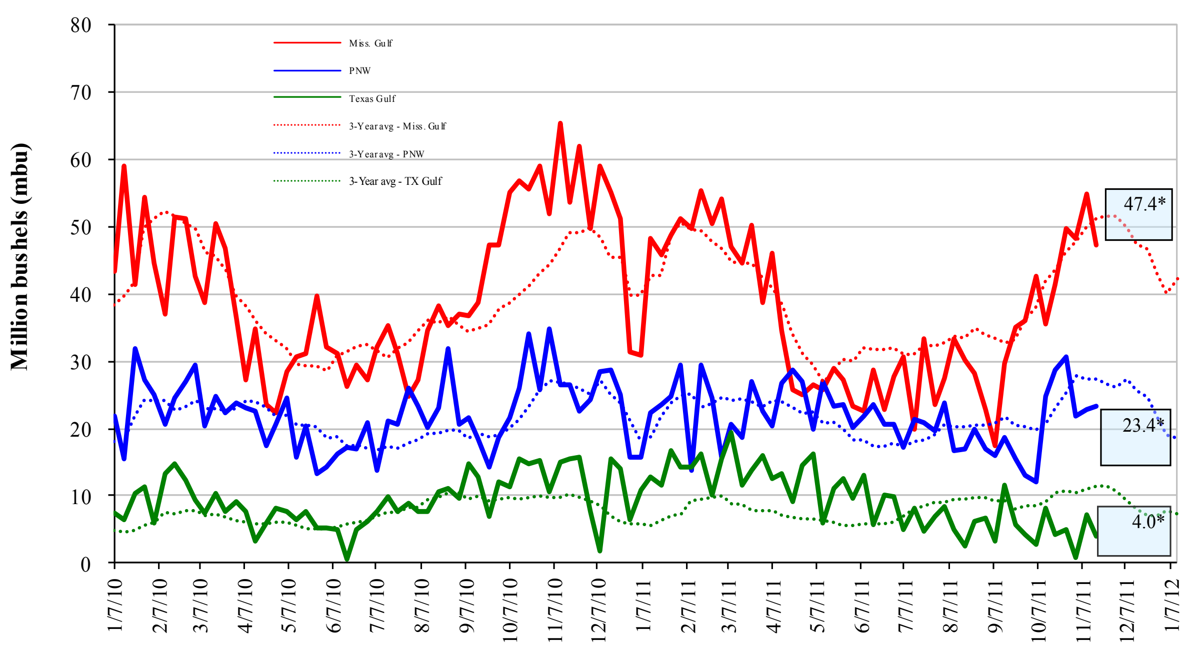


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

November 17 % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 13	down 44	down 17	up 3
Last year (same week)	down 12	down 74	down 26	down 12
3-yr avg. (4-wk mov. avg.)	down 8	down 65	down 18	down 18

Ocean Transportation

Table 17

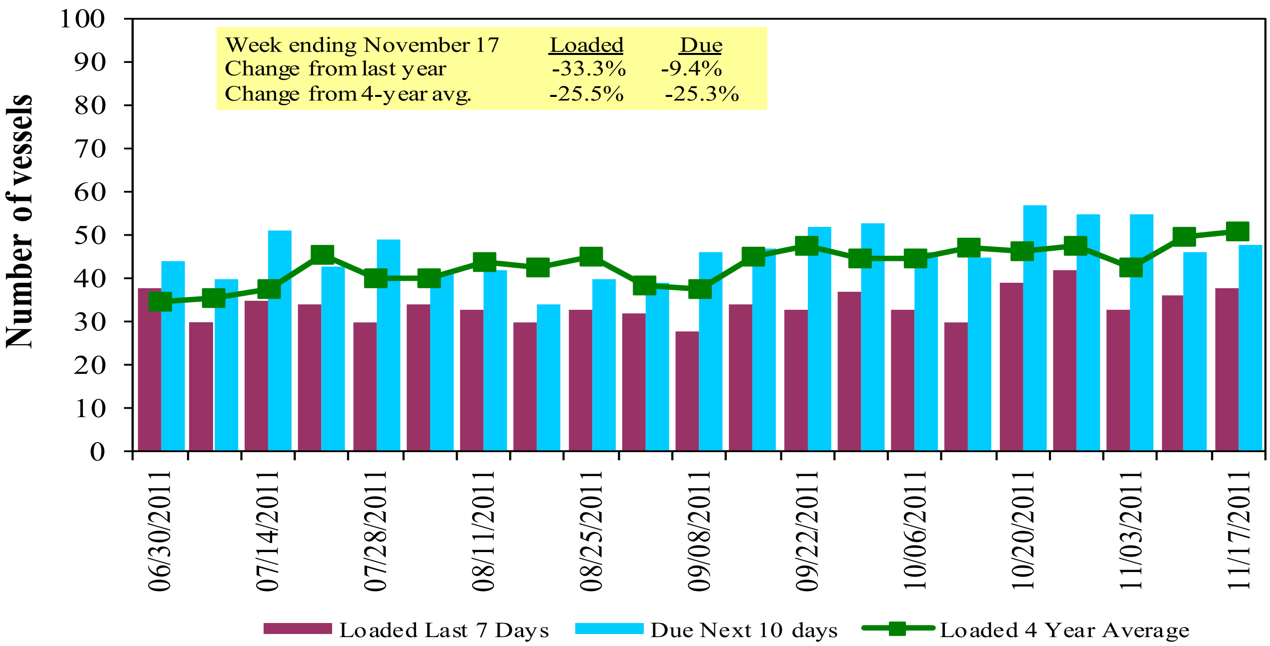
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
11/17/2011	33	38	48	12	14
11/10/2011	27	36	46	11	11
2010 range	(15..69)	(30..57)	(33..84)	(4..24)	(2..20)
2010 avg.	41	42	58	12	11

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

U.S. Gulf[1] Vessel Loading Activity

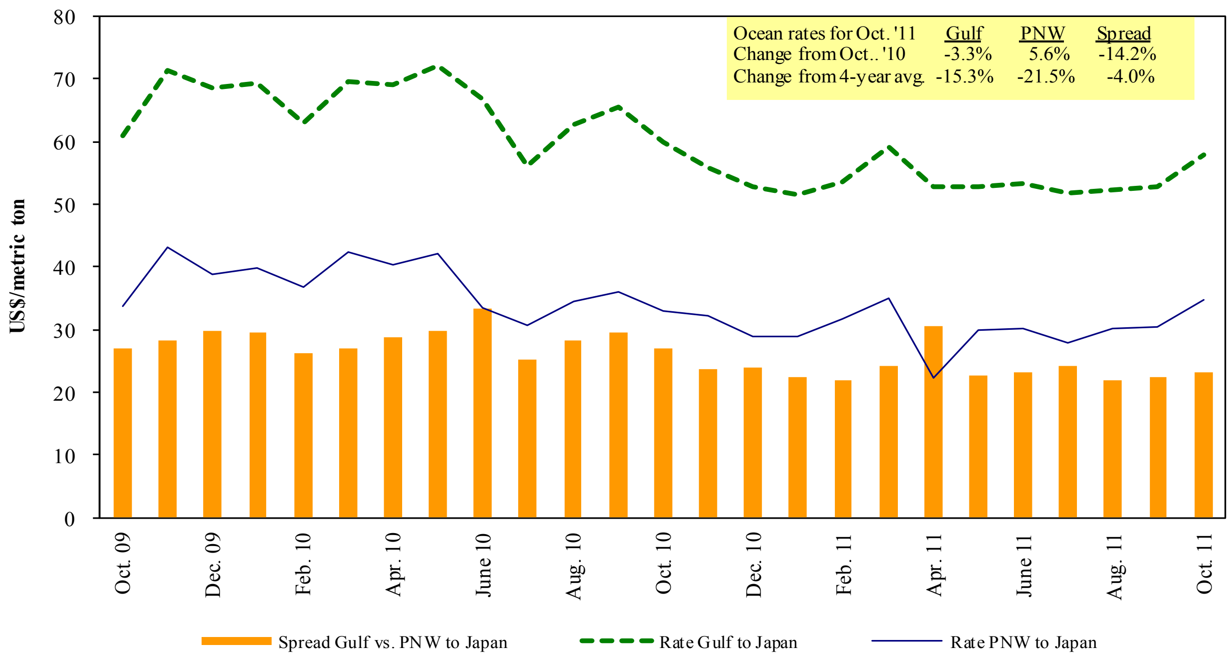


Source:Transportation & Marketing Programs/AMS/USDA

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

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18

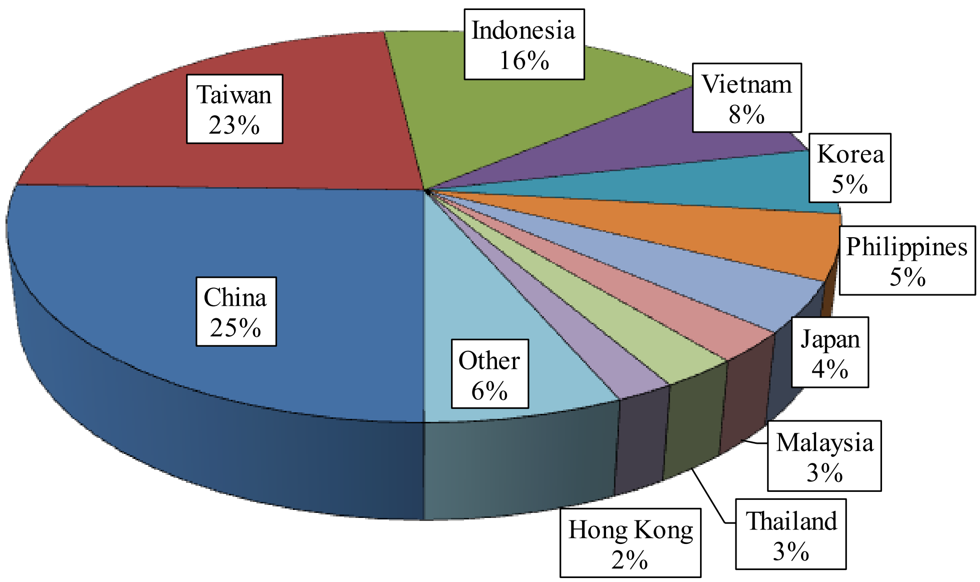
Ocean Freight Rates For Selected Shipments, Week Ending 11/19/2011

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Dec 10/20	55,000	56.00
U.S. Gulf	China	Heavy Grain	Dec 1/30	55,000	51.00
U.S. Gulf	China	Heavy Grain	Oct 21/30	55,000	52.50
U.S. Gulf	China	Heavy Grain	Oct 5/10	60,000	59.00
U.S. Gulf	China	Heavy Grain	Sep 15/30	60,000	54.00
U.S. Gulf	China	Heavy Grain	Sep 1/10	60,000	48.25
U.S. Gulf	China	Heavy Grain	Aug 17/Sep 30	60,000	49.00
U.S. Gulf	Japan	Heavy Grain	June 1/12	54,000	52.50
U.S. Gulf	Korea	Grain	Nov 25/Dec 5	55,000	57.00
U.S. Gulf	Djibouti[1]	Wheat	Dec 5/15	35,800	125.25
PNW	China	Heavy Grain	Dec 5/20	6,500	26.00
France	Algeria	Wheat	Nov 1/2	20,000	35.00
France	Algeria	Wheat	Sep 25/30	25,000	24.50
River Plate	Algeria	Maize	Oct 20/30	25,000	36.00
River Plate	Algeria	Maize	Oct 1/5	25,000	34.50
River Plate	Algeria	Corn	July 15/25	25,000	43.50
River Plate	Algeria	Corn	July 1/10	25,000	42.90
River Plate	Algeria	Corn	June 15/25	25,000	42.75
River Plate	Algeria	Wheat	Aug 18/25	25,000	49.00
South Africa	Taiwan	Corn	Aug 5/15	55,000	31.00

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, August 2011

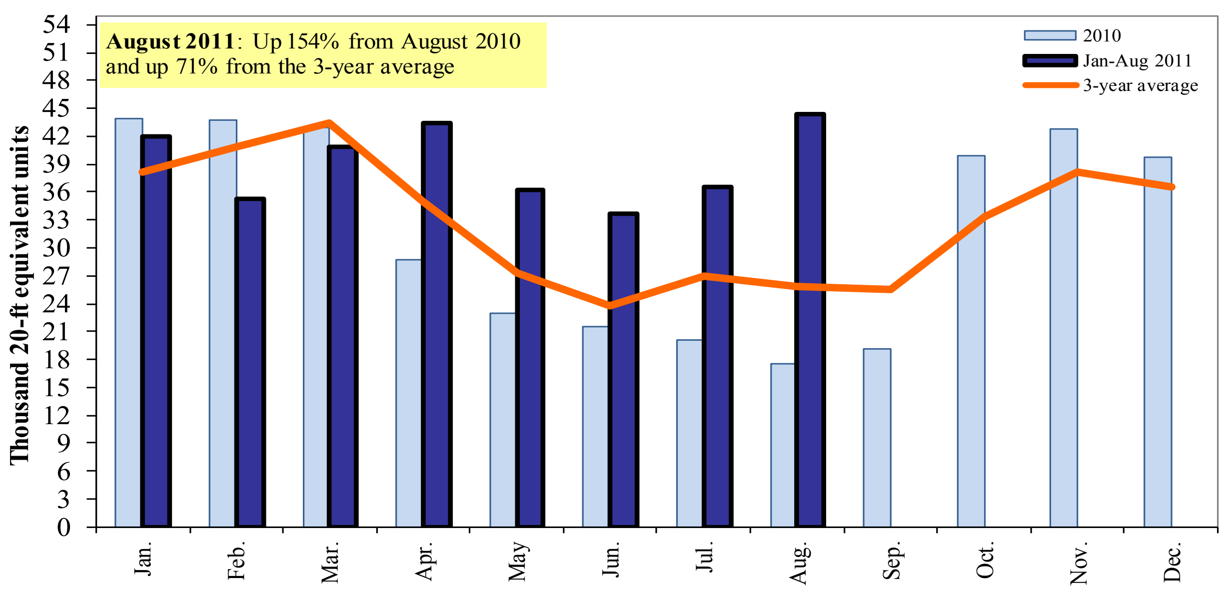


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements (recently added codes are highlighted in bold type): 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, **230330**, and **120810**.

Figure 19

Monthly Shipments of Containerized Grain to Asia



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

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements (recently added codes are highlighted in bold type): 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, **230330**, and **120810**.

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
Weekly Highlight Editors		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
April Taylor	april.taylor@ams.usda.gov	(202) 295 - 7374
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
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

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