



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
www.ams.usda.gov/GTR

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April 21, 2016

WEEKLY HIGHLIGHTS

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Panama Canal Announces Third Draft Restrictions

Following previous announcements (see 04/07/16 [Grain Transportation Report](#)), the Panama Canal Authority announced a third round of draft restrictions on April 11 that will be imposed on vessels transiting the canal, effective May 9, 2016. The restrictions are based on the present and projected level of Gatun Lake. The maximum authorized transit draft is set at 11.59 meters (38.0 feet). The restrictions will be waived for vessels loaded over 11.59 meters (38.0 feet) on or before April 11. Vessels loaded after April 11 shall comply with the new draft limit. Depending on the level of Gatun Lake at the time of transit, vessels may be required to trim or off-load cargo if they are over 11.59 meters (38.0) in draft. Draft restrictions will be implemented in 15-centimeter (6-inch) decrements at a time, with each restriction announced at least 4 weeks in advance. For more information, see <https://www.pancanal.com/common/maritime/advisories/2016/a-18-2016.pdf>

U.S. Department of Transportation (DOT) designates Three New Marine Highway Projects

According to an April 8 news release, DOT Secretary Anthony Foxx has designated three new Marine Highway Projects: (1) the Baton Rouge-New Orleans Shuttle project, sponsored by the Port of New Orleans (in partnership with the Port of Greater Baton Rouge and SEACOR AMH, LLC), a container-on-barge project to operate between Ports of Greater Baton Rouge and New Orleans; (2) the Illinois Intrastate Shuttle project, aiming to shift about 5,500 containers in its first year of operation to reduce the congestion of north-south interstate 55 to the Mississippi River by providing soybean and grain shippers a new routing option; and (3) the Lake Erie Shuttle project, sponsored by the Port of Monroe to carry cargo between the ports of Monroe, MI, Cleveland, OH, and Detroit, MI. All three projects are expected to offer new modal choices for shippers, reduce transportation costs, and provide public benefits. With DOT's official designation, these projects are eligible for federal funding.

Wheat Inspections Rebound

For the week ending April 14, **total inspections of grain** (corn, wheat, soybeans) for export from all major export regions reached 1.82 million metric tons (mmt), down 3 percent from the past week, unchanged from last year, and 3 percent below the 3-year average. Despite the drop in total inspections, wheat inspections rebounded; increasing 34 percent from the past week as shipments to Latin America rose. Soybean inspections decreased 34 percent from the previous week as shipments dropped to Asia and Latin America receded. Corn inspections decreased 3 percent for the same period. Mississippi Gulf grain inspections decreased 7 percent from the previous week, while Pacific Northwest (PNW) inspections decreased 18 percent from the past week. Outstanding export sales (unshipped) of grain increased slightly from the past week for corn and soybeans but decreased for wheat.

Snapshots by Sector

Export Sales

During the week ending April 7, **unshipped balances** of wheat, corn, and soybeans totaled 19.2 mmt, down 11 percent from the same time last year. Net weekly **wheat export sales**, at .125 mmt, were up significantly from the previous week. Net **corn export sales** were 1.14 mmt, up 20 percent from the previous week, and net **soybean export sales** were .456 mmt, up 8 percent from the past week.

Rail

U.S. Class I railroads originated 18,871 **grain carloads** for the week ending April 9, down 13 percent from the previous week, down 21 percent from last year, and down 6 percent from the 3-year average.

Average April shuttle **secondary railcar bids/offers** per car were \$225 below tariff for the week ending April 14, up \$13 from last week. There were no shuttle bids/offers this week last year. Non-shuttle secondary railcar bids/offers were \$63 below tariff, down \$6 from last week. There were no non-shuttle bids/offers this week last year.

Barge

For the week ending April 16, **barge grain movements** totaled 681,300 tons, 1 percent lower than last week, and down 2 percent from the same period last year.

For the week ending April 16, 431 grain barges **moved down river**, down 2 percent from last week; 546 grain barges were **unloaded in New Orleans**, down 15 percent from the previous week.

Ocean

For the week ending April 14, 33 **ocean-going grain vessels** were loaded in the Gulf, 3 percent less than the same period last year. Fifty-six vessels are expected to be loaded within the next 10 days, 2 percent more than the same period last year.

For the week ending April 14, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$24.50 per metric ton, up 2 percent from the previous week. The cost of shipping from the PNW to Japan was \$14.75 per metric ton, up 2 percent from the previous week.

Fuel

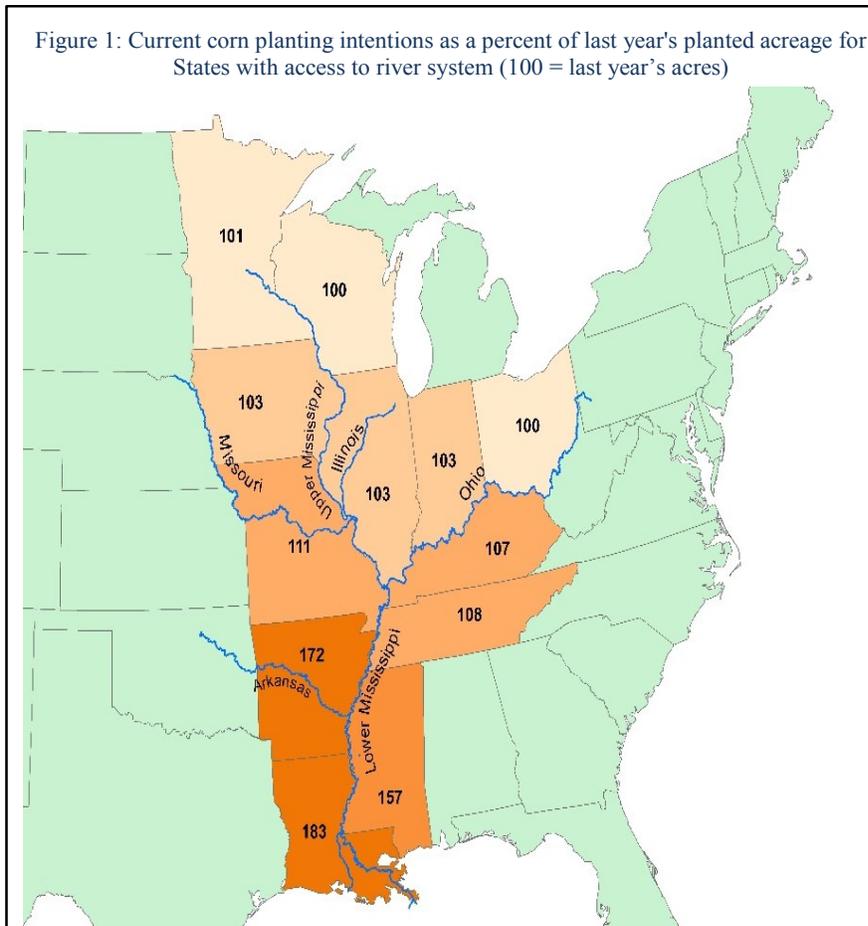
During the week ending April 18, U.S. average **diesel fuel prices** increased 4 cents from the previous week at \$2.16 per gallon, down \$0.61 from the same week last year.

Feature Article/Calendar

U.S. Corn Growers Plan for Large Increase in Acres

According to USDA's National Agricultural Statistics Service (NASS) March 31, 2016 [Prospective Plantings report](#), growers intend to plant 93.6 million acres of corn, up 6 percent from last year. If realized, this will represent the highest planted acreage in the United States since 2013, and will be the third highest planted acreage in the United States since 1944. NASS reports that growers are expecting higher returns for corn during 2016 compared with other crops. Corn growers in 41 of the 48 contiguous States expect to either maintain or increase the number of acres of corn they plant. In contrast, U.S. soybean growers expect to reverse the trends of record crops in recent years. In 2016, NASS said growers expect to plant 82.2 million acres of soybeans, a decrease of less than 1 percent from 2015.

Almost all States with access to the Mississippi, Illinois, Ohio, or Arkansas Rivers are expected to plant the same or additional acres of corn this year compared to last year (see Figure 1). However, several States in the mid-south (Louisiana, Mississippi, and Arkansas) are expected by NASS to see significant increases in acreages. If there is a large southern corn crop this may result in early demand for barge services as the corn crop is harvested.



USDA's April 2016 *World Agricultural Supply and Demand Estimates (WASDE)* projected that for the 2015/16 crop year, corn exports will be 1.650 billion bushels, soybean exports will be 1.705 billion bushels, and wheat exports will be 0.775 billion bushels. U.S. corn has a variety of uses, which principally includes feed, ethanol and by-products, such as distillers dried grains. Export corn represents 12 percent of production in 2015/16, while export soybeans are expected to be 43 percent of production.

Table 13 of this week's Grain Transportation Report shows that marketing year-to-date U.S. corn exports to top East Asian importers (Japan, South Korea, and Taiwan) are currently all lower than the shipments at the same time last year. For instance, Japan has lost its position as the top U.S. corn importer to Mexico, and the U.S.'s corn exports to Japan are currently 27 percent lower than last year. According to WASDE, Japanese corn consumption has been revised lower for several years.

For the last 3 years, total barge tonnages reached peak annual volumes during the fall grain and oilseed harvest, typically from late September to early December

(see Figure 2 on next page), due to large increases in barged soybeans occurring during harvest.¹

Barge corn tonnages are generally the highest during June, well before the harvest season. Wheat barge movements, while significantly less in volume than corn and soybeans, are generally the largest during late summer.

¹ Weekly barge shipments are the sum of the downbound grain through the locking portions of the Mississippi, Ohio, and Arkansas Rivers.

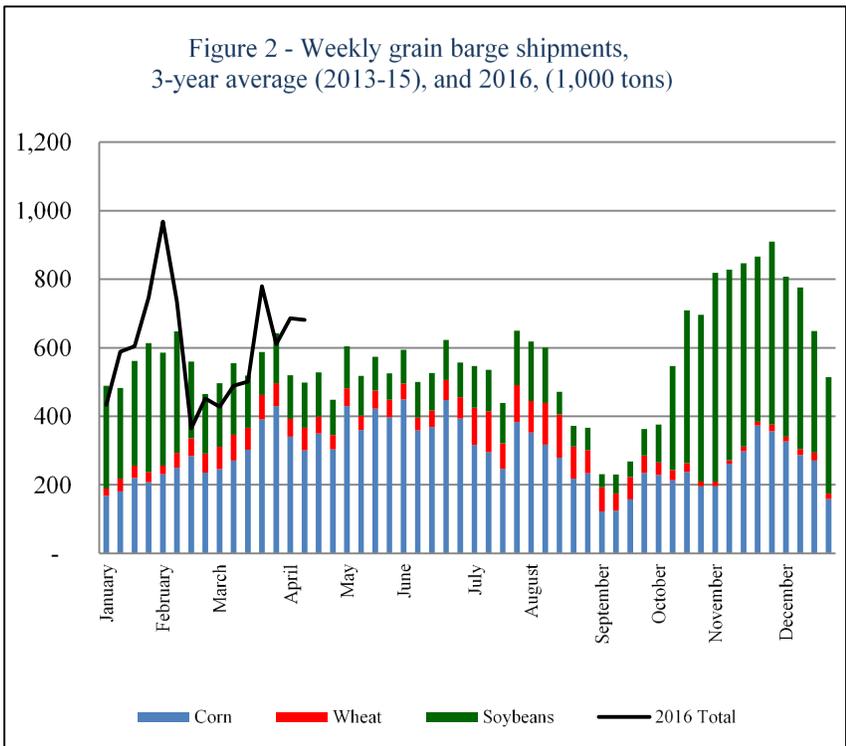


Figure 2 shows the typical drop that occurs in September as the number of downbound grain loaded barges decrease as more empty barges are moved upbound to be stationed near shippers that will move significant amounts of grain later in the fall.

Current weekly total tonnages for 2016 are shown in Figure 2. Overall, total shipments so far in 2016 have followed a similar pattern of the 3-year average: increasing until a drop in early February, followed by another trend of increase until April. Figure 2 also shows fluctuations in total shipments so far in 2016 were higher than the 3-year average. For example, the total shipments reached 0.97 million tons in the first week of February, while the 3-year average was 0.58 million tons for the same time. The current year-to-date totals are about 1.1 million tons higher than the 3-year average.¹

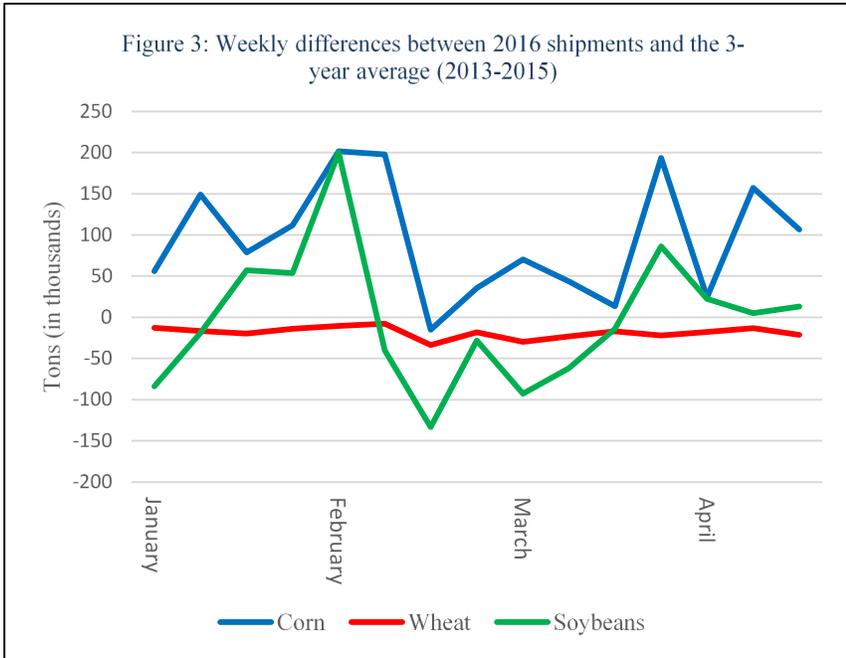


Figure 3 provides a breakdown of the differences between the 2016 weekly shipments and 3-year average by crop. So far in 2016, wheat shipments were relatively consistent with the 3-year average. Corn shipments were higher than the 3-year average and contributed significantly to 2016's higher year-to-date barge grain shipments. While soybeans shipments fluctuated above and below the 3-year average.

During early spring, soybean barge movements are influenced by the harvest of South American soybeans. When new crop Brazilian soybeans become available, U.S. soybean barge volumes begin to decrease, while corn barge volumes begin a gradual increase. However, the timing and size of the Brazilian soybean harvest is just one of the numerous factors that impact the seasonality of U.S. soybean and corn barge movements. Other factors include

changes in world supply and demand, changes in U.S. demand for processing and feed use, and transportation disruptions such as flooding, drought, lock repairs and maintenance, channel dredging, and rail congestion.

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¹ Data sources for Figure 2 and Figure 3: U.S. Army Corps of Engineers.

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck		Rail		Barge	Ocean	
		Unit	Train	Shuttle		Gulf	Pacific
04/20/16	145	250	190	160	110	105	
04/13/16	143	250	190	154	107	103	

¹Indicator: Base year 2000 = 100; Weekly updates include truck = diesel (\$/gallon); rail = near-month secondary rail market bid and monthly tariff rate with fuel surcharge (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); and ocean = routes to Japan (\$/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

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

Commodity	Origin--Destination	4/15/2016	4/8/2016
Corn	IL--Gulf	-0.57	-0.56
Corn	NE--Gulf	-0.82	-0.80
Soybean	IA--Gulf	-1.00	-0.99
HRW	KS--Gulf	-1.05	-1.07
HRS	ND--Portland	-1.76	-1.72

Note: nq = no quote

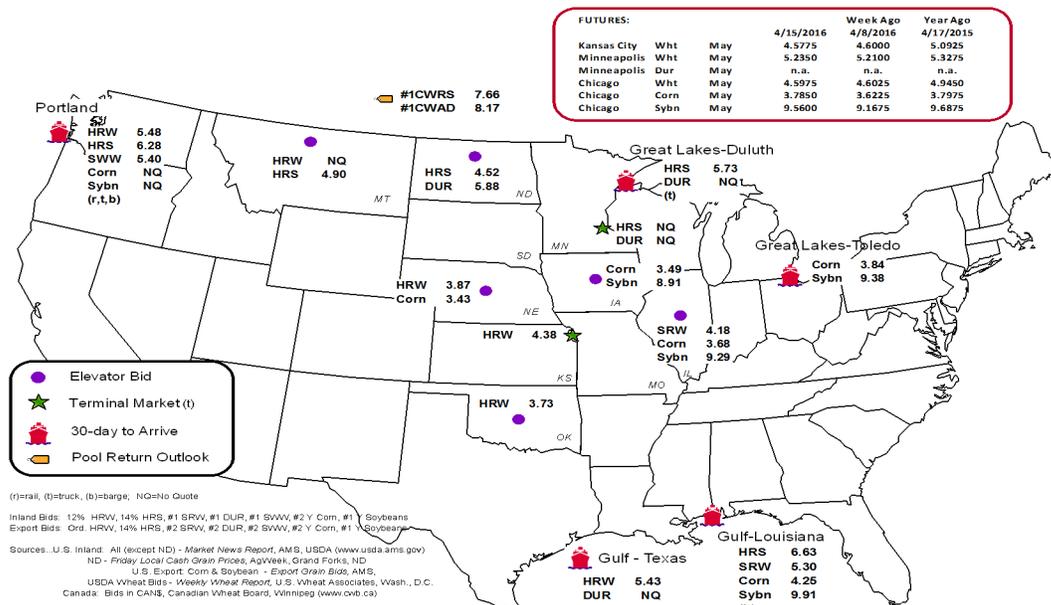
Source: Transportation & Marketing Programs/AMS/USDA

n/a: quotes are not available due to the holiday

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

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
4/13/2016 ^p	145	1,467	3,588	241	5,441	4/9/2016	1,849
4/06/2016 ^r	2	1,124	5,238	258	6,622	4/2/2016	2,734
2016 YTD ^r	5,255	22,989	84,699	8,169	121,112	2016 YTD	28,692
2015 YTD ^r	9,468	20,479	84,786	10,460	125,193	2015 YTD	24,204
2016 YTD as % of 2015 YTD	56	112	100	78	97	% change YTD	119
Last 4 weeks as % of 2015 ²	17	84	80	77	79	Last 4wks % 2015	131
Last 4 weeks as % of 4-year avg. ²	13	101	105	73	93	Last 4wks % 4 yr	118
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736
Total 2014	44,617	83,674	256,670	32,107	417,068	Total 2014	98,422

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2015 and prior 4-year average.

³ Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads to reflect switching between KCSM and FerroMex.

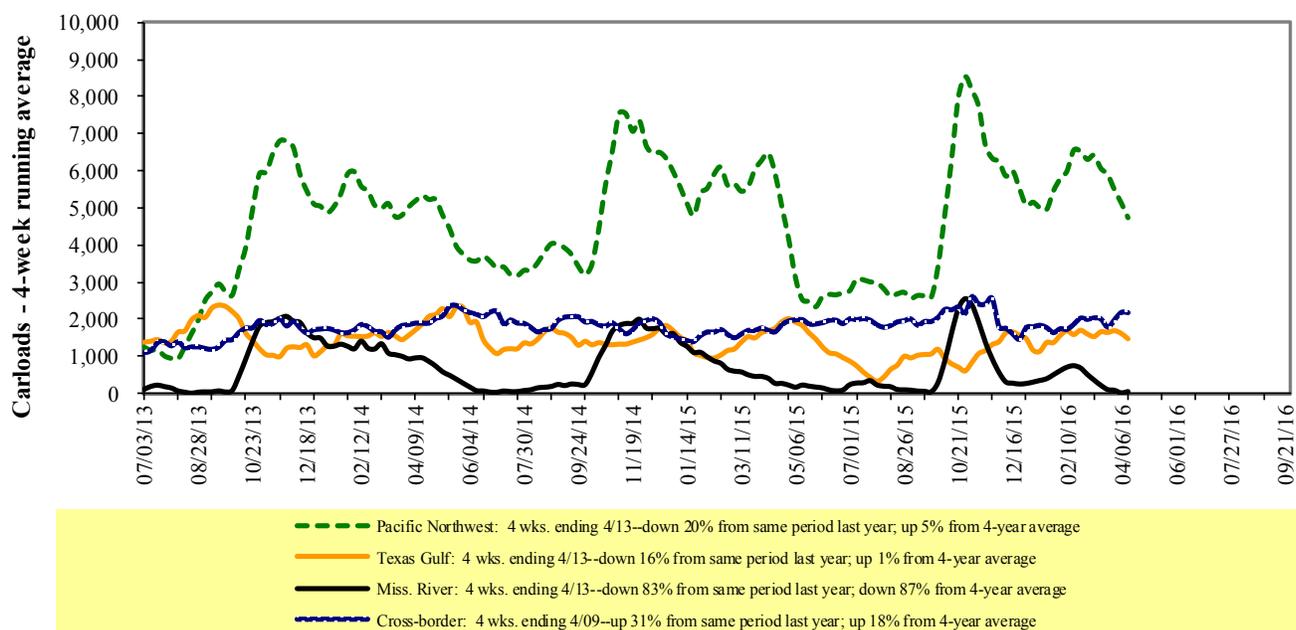
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 24 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

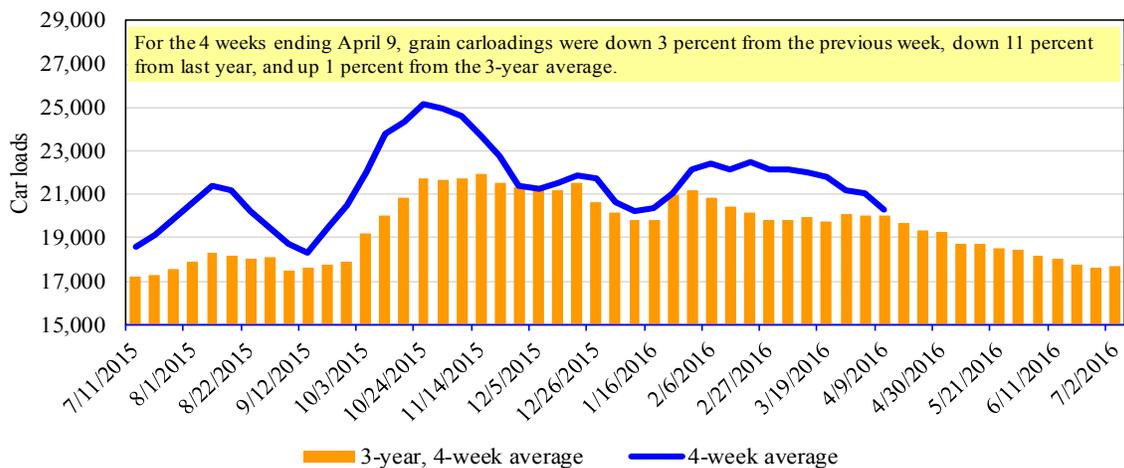
Class I Rail Carrier Grain Car Bulletin (grain carloads originated)

For the week ending: 4/9/2016	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,659	2,490	8,772	973	4,977	18,871	3,095	4,887
This week last year	2,275	3,458	11,694	957	5,357	23,741	3,868	4,582
2016 YTD	26,792	38,868	151,373	12,015	73,365	302,413	48,133	64,449
2015 YTD	30,083	43,115	154,974	12,101	77,315	317,588	57,272	59,846
2016 YTD as % of 2015 YTD	89	90	98	99	95	95	84	108
Last 4 weeks as % of 2015*	80	83	89	88	97	89	88	135
Last 4 weeks as % of 3-yr avg.**	93	93	105	108	101	101	87	108
Total 2015	104,039	149,043	536,173	45,445	267,720	1,102,420	211,868	236,263

*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**The past 4 weeks as a percent of the same period from 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

For the week ending: 4/14/2016		Delivery period							
		Apr-16	Apr-15	May-16	May-15	Jun-16	Jun-15	Jul-16	Jul-15
BNSF ³	COT grain units	no bids	n/a	0	no bids	0	no bids	no bids	2
	COT grain single-car ⁵	0	n/a	0	no bids	no bids	no bids	no bids	0
UP ⁴	GCAS/Region 1	no offer	n/a	no bids	no bids	no bids	no bids	n/a	no bids
	GCAS/Region 2	no offer	n/a	no bids	no bids	no bids	no bids	n/a	no bids

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.

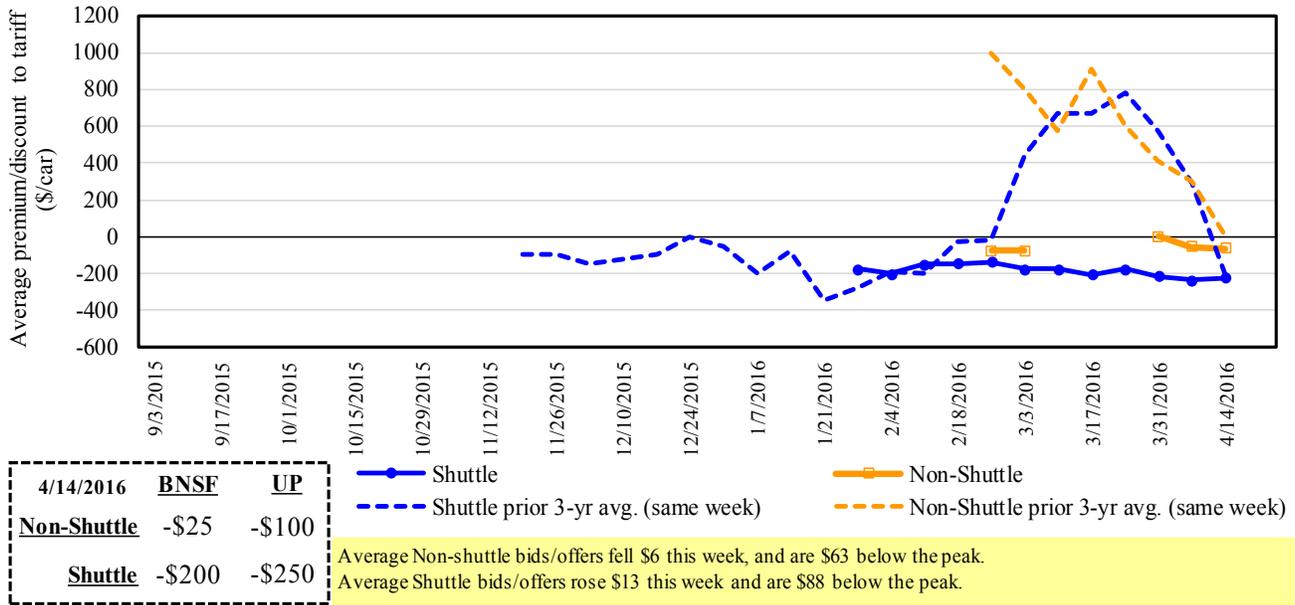
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

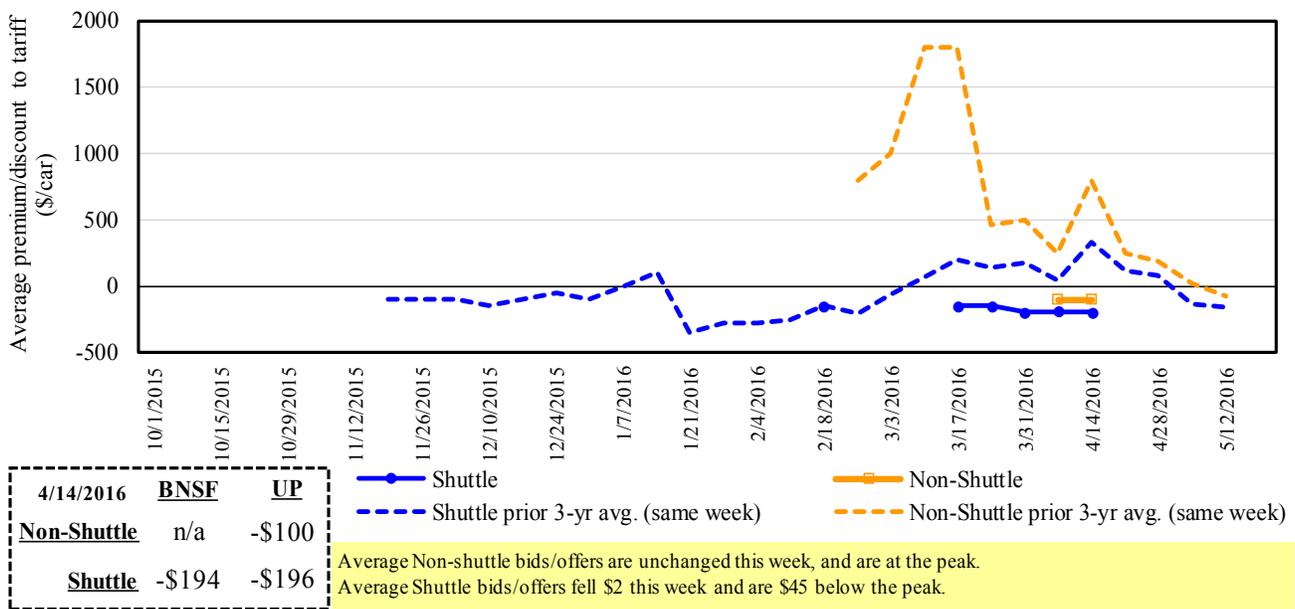
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4
Bids/Offers for Railcars to be Delivered in April 2016, Secondary Market



Non-shuttle bids include unit-train and single-car bids. n/a = not available.
 Source: Transportation & Marketing Programs/AMS/USDA

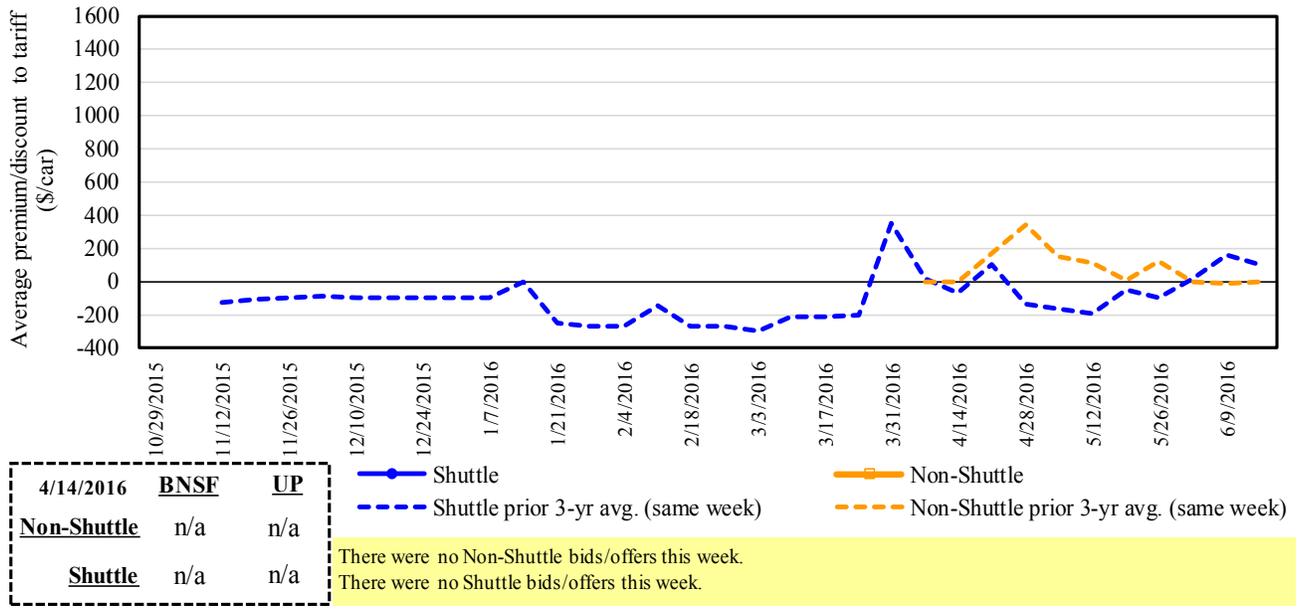
Figure 5
Bids/Offers for Railcars to be Delivered in May 2016, Secondary Market



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 2016, 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

For the week ending:		Delivery period					
		Apr-16	May-16	Jun-16	Jul-16	Aug-16	Sep-16
Non-shuttle	BNSF-GF	(25)	n/a	n/a	n/a	n/a	n/a
	Change from last week	(11)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(100)	(100)	n/a	n/a	n/a	n/a
	Change from last week	0	0	n/a	n/a	n/a	n/a
	Change from same week 2015	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	(200)	(194)	n/a	n/a	n/a	n/a
	Change from last week	25	(13)	n/a	n/a	n/a	n/a
	Change from same week 2015	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(250)	(196)	n/a	n/a	n/a	n/a
	Change from last week	0	8	n/a	n/a	n/a	n/a
	Change from same week 2015	n/a	104	n/a	n/a	n/a	n/a

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

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 James B. Joiner Co., Tradewest Brokerage Co.

The **tariff rail rate** is the base price of freight rail service, and together with **fuel surcharges** and any **auction and secondary rail** values constitute the full cost of shipping by rail. Typically, auction and secondary rail values are a small fraction of the full cost of shipping by rail relative to the tariff rate. High auction and secondary rail values, during times of high rail demand or short supply, can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

Effective date:		Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ³
4/1/2016	metric ton					bushel ²		
Unit train								
Wheat	Wichita, KS	St. Louis, MO	\$3,605	\$0	\$35.80	\$0.97	4	
	Grand Forks, ND	Duluth-Superior, MN	\$3,463	-\$36	\$34.03	\$0.93	-5	
	Wichita, KS	Los Angeles, CA	\$6,950	-\$184	\$67.19	\$1.83	6	
	Wichita, KS	New Orleans, LA	\$4,243	\$0	\$42.14	\$1.15	2	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,486	-\$151	\$62.91	\$1.71	7	
	Northwest KS	Galveston-Houston, TX	\$4,511	\$0	\$44.80	\$1.22	1	
	Amarillo, TX	Los Angeles, CA	\$4,710	\$0	\$46.77	\$1.27	0	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$0	\$36.55	\$0.93	6	
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	5	
	Des Moines, IA	Davenport, IA	\$2,168	\$0	\$21.53	\$0.55	-2	
	Indianapolis, IN	Atlanta, GA	\$5,004	\$0	\$49.69	\$1.26	2	
	Indianapolis, IN	Knoxville, TN	\$4,311	\$0	\$42.81	\$1.09	3	
Soybeans	Des Moines, IA	Little Rock, AR	\$3,444	\$0	\$34.20	\$0.87	1	
	Des Moines, IA	Los Angeles, CA	\$5,052	\$0	\$50.17	\$1.27	-2	
	Minneapolis, MN	New Orleans, LA	\$3,824	\$0	\$37.97	\$1.03	0	
	Toledo, OH	Huntsville, AL	\$5,051	\$0	\$50.16	\$1.37	5	
	Indianapolis, IN	Raleigh, NC	\$6,178	\$0	\$61.35	\$1.67	6	
Shuttle Train	Indianapolis, IN	Huntsville, AL	\$4,529	\$0	\$44.98	\$1.22	2	
	Champaign-Urbana, IL	New Orleans, LA	\$4,395	\$0	\$43.64	\$1.19	6	
Wheat	Great Falls, MT	Portland, OR	\$3,853	-\$106	\$37.21	\$1.01	0	
	Wichita, KS	Galveston-Houston, TX	\$3,871	-\$82	\$37.62	\$1.02	7	
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	12	
	Grand Forks, ND	Portland, OR	\$5,511	-\$182	\$52.92	\$1.44	1	
	Grand Forks, ND	Galveston-Houston, TX	\$5,831	-\$190	\$56.02	\$1.52	-9	
	Northwest KS	Portland, OR	\$5,478	\$0	\$54.40	\$1.48	-1	
	Corn	Minneapolis, MN	Portland, OR	\$5,000	-\$222	\$47.45	\$1.21	-8
Sioux Falls, SD		Tacoma, WA	\$4,960	-\$203	\$47.24	\$1.20	-7	
Champaign-Urbana, IL		New Orleans, LA	\$3,481	\$0	\$34.57	\$0.88	5	
Lincoln, NE		Galveston-Houston, TX	\$3,600	-\$119	\$34.57	\$0.88	-3	
Des Moines, IA		Amarillo, TX	\$3,795	\$0	\$37.69	\$0.96	-1	
Minneapolis, MN		Tacoma, WA	\$5,000	-\$220	\$47.46	\$1.21	-7	
Council Bluffs, IA		Stockton, CA	\$4,640	-\$228	\$43.81	\$1.11	-3	
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,490	-\$203	\$52.50	\$1.43	-7	
	Minneapolis, MN	Portland, OR	\$5,510	-\$222	\$52.51	\$1.43	-7	
	Fargo, ND	Tacoma, WA	\$5,380	-\$181	\$51.63	\$1.41	-7	
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$0	\$43.94	\$1.20	-4	
	Toledo, OH	Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	6	
Grand Island, NE	Portland, OR	\$5,360	\$0	\$53.23	\$1.45	-5		

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

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel surcharge per car ²	Tariff plus surcharge per:		Percent change ⁴ Y/Y
					metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	5
	OK	Cuautitlan, EM	\$6,514	\$0	\$66.55	\$1.81	-4
	KS	Guadalajara, JA	\$6,995	\$70	\$72.19	\$1.96	-2
	TX	Salinas Victoria, NL	\$4,142	\$0	\$42.32	\$1.15	4
Corn	IA	Guadalajara, JA	\$8,397	\$49	\$86.30	\$2.19	-2
	SD	Celaya, GJ	\$7,840	\$0	\$80.11	\$2.03	0
	NE	Queretaro, QA	\$7,879	\$0	\$80.50	\$2.04	0
	SD	Salinas Victoria, NL	\$6,545	\$0	\$66.87	\$1.70	9
	MO	Tlalnepantla, EM	\$7,238	\$0	\$73.96	\$1.88	1
	SD	Torreon, CU	\$7,240	\$0	\$73.98	\$1.88	2
Soybeans	MO	Bojay (Tula), HG	\$8,652	\$54	\$88.95	\$2.42	2
	NE	Guadalajara, JA	\$9,142	\$52	\$93.93	\$2.55	1
	IA	El Castillo, JA	\$9,470	\$0	\$96.76	\$2.63	1
	KS	Torreon, CU	\$7,439	\$30	\$76.31	\$2.07	1
Sorghum	NE	Celaya, GJ	\$7,344	\$41	\$75.45	\$1.91	-2
	KS	Queretaro, QA	\$7,563	\$0	\$77.27	\$1.96	7
	NE	Salinas Victoria, NL	\$6,168	\$0	\$63.02	\$1.60	8
	NE	Torreon, CU	\$6,672	\$25	\$68.42	\$1.74	0

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.

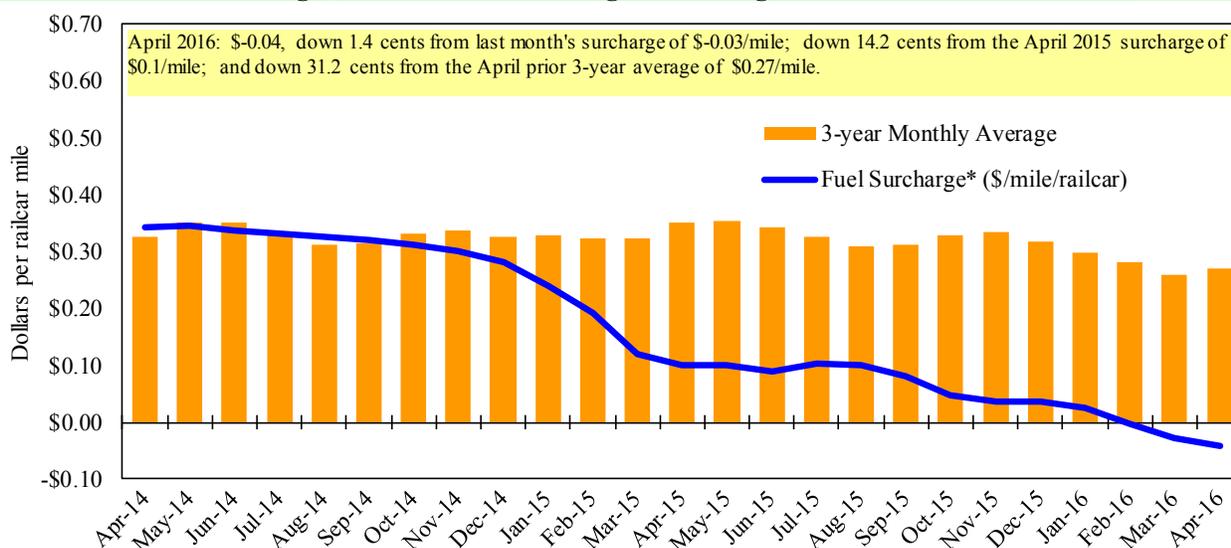
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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

⁴Percentage change calculated using tariff rate plus fuel surcharge

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹

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

* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

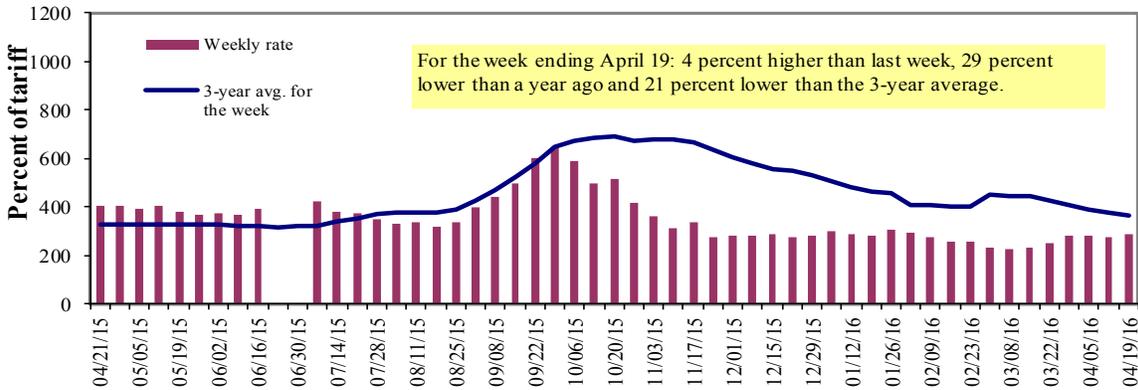
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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	4/19/2016	348	298	288	225	213	213	192
	4/12/2016	348	300	278	200	213	213	180
\$/ton	4/19/2016	21.54	15.85	13.36	8.98	9.99	8.61	6.03
	4/12/2016	21.54	15.96	12.90	7.98	9.99	8.61	5.65
Current week % change from the same week:								
	Last year	-17	-28	-29	-33	-34	-34	-33
	3-year avg. ²	-13	-21	-21	-20	-25	-25	-19
Rate¹	May	335	295	278	205	203	203	183
	July	333	298	278	213	203	203	185

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; missing data due to winter closure or flooding

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9 Benchmark tariff rates

Calculating barge rate per ton:
(Rate * 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.

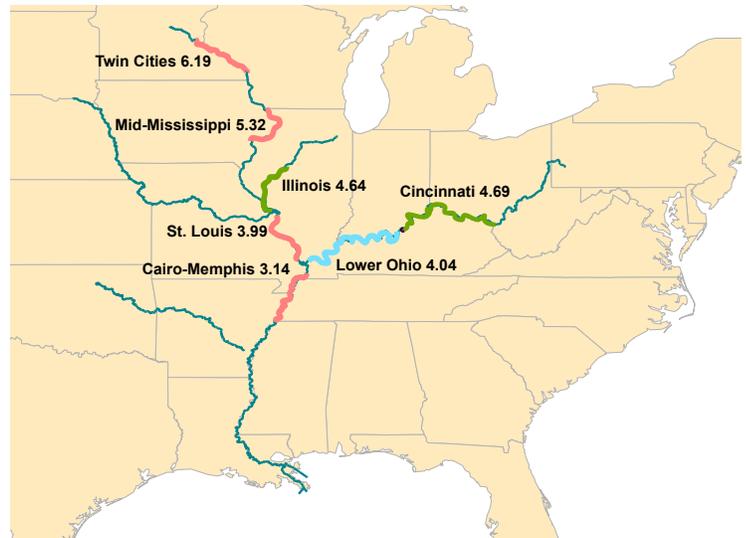
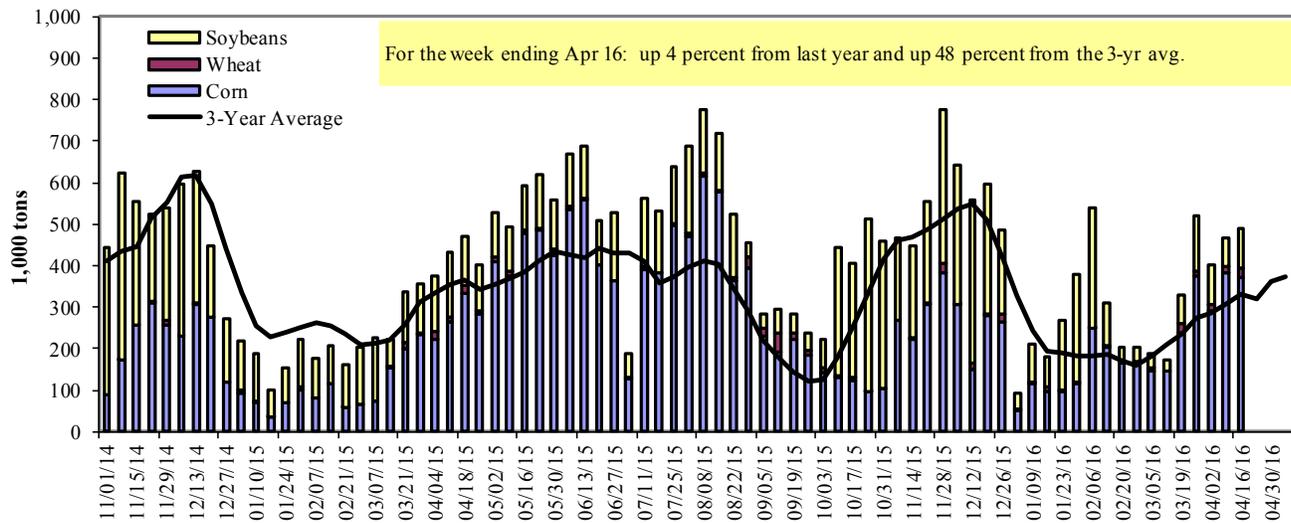


Figure 10

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

Table 10

Barge Grain Movements (1,000 tons)

For the week ending 4/16/2016	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	160	19	66	0	245
Winfield, MO (L25)	332	11	73	0	416
Alton, IL (L26)	442	21	94	0	557
Granite City, IL (L27)	373	22	93	0	488
Illinois River (L8)	163	7	3	0	172
Ohio River (L52)	108	3	51	0	163
Arkansas River (L1)	0	14	17	0	31
Weekly total - 2016	481	40	161	0	681
Weekly total - 2015	489	51	151	3	694
2016 YTD ¹	5,173	434	3,462	47	9,116
2015 YTD	4,644	390	3,612	70	8,716
2016 as % of 2015 YTD	111	111	96	67	105
Last 4 weeks as % of 2015 ²	107	108	89	7	101
Total 2015	19,215	1,686	14,191	359	35,451

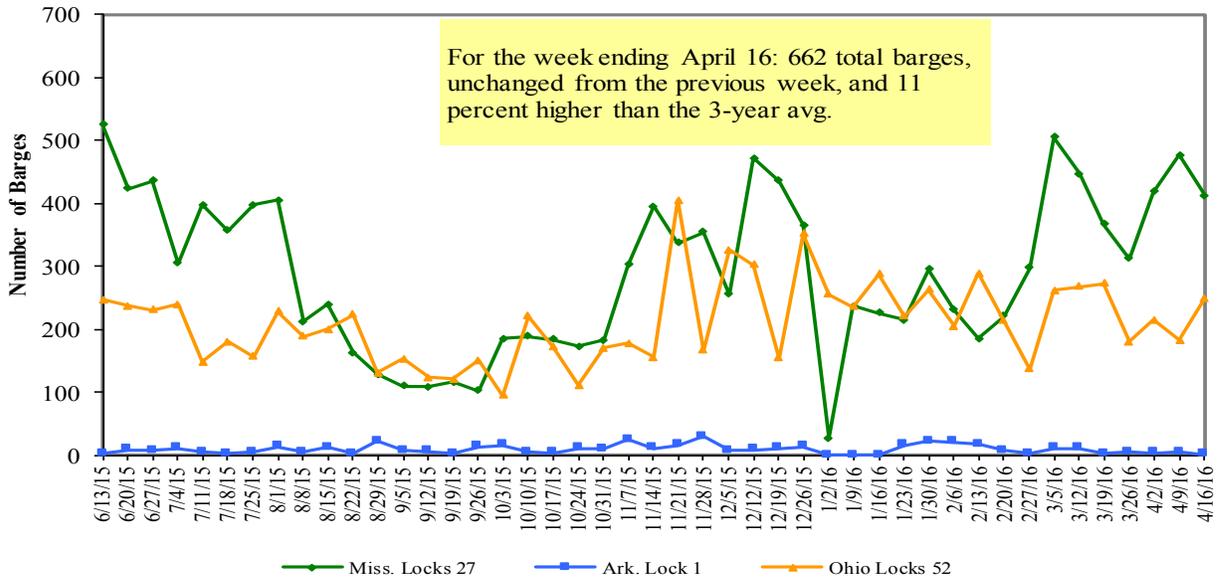
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2015.

Note: Total may not add exactly, due to rounding

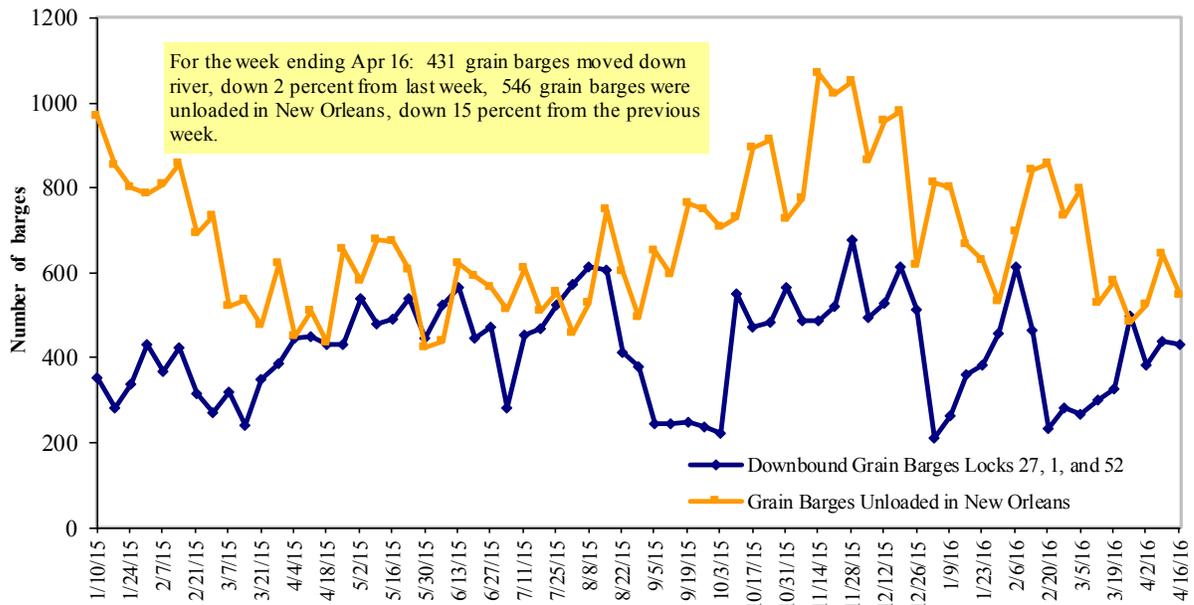
Source: U.S. Army Corps of Engineers

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



Source: U.S. Army Corps of Engineers

Figure 12
Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices¹, Week Ending 4/18/2016 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.220	0.033	-0.706
	New England	2.287	0.050	-0.762
	Central Atlantic	2.325	0.024	-0.756
	Lower Atlantic	2.126	0.036	-0.657
II	Midwest ²	2.112	0.030	-0.547
III	Gulf Coast ³	2.046	0.054	-0.613
IV	Rocky Mountain	2.171	0.029	-0.542
V	West Coast	2.371	0.039	-0.594
	West Coast less California	2.251	0.051	-0.545
	California	2.466	0.029	-0.636
Total	U.S.	2.165	0.037	-0.615

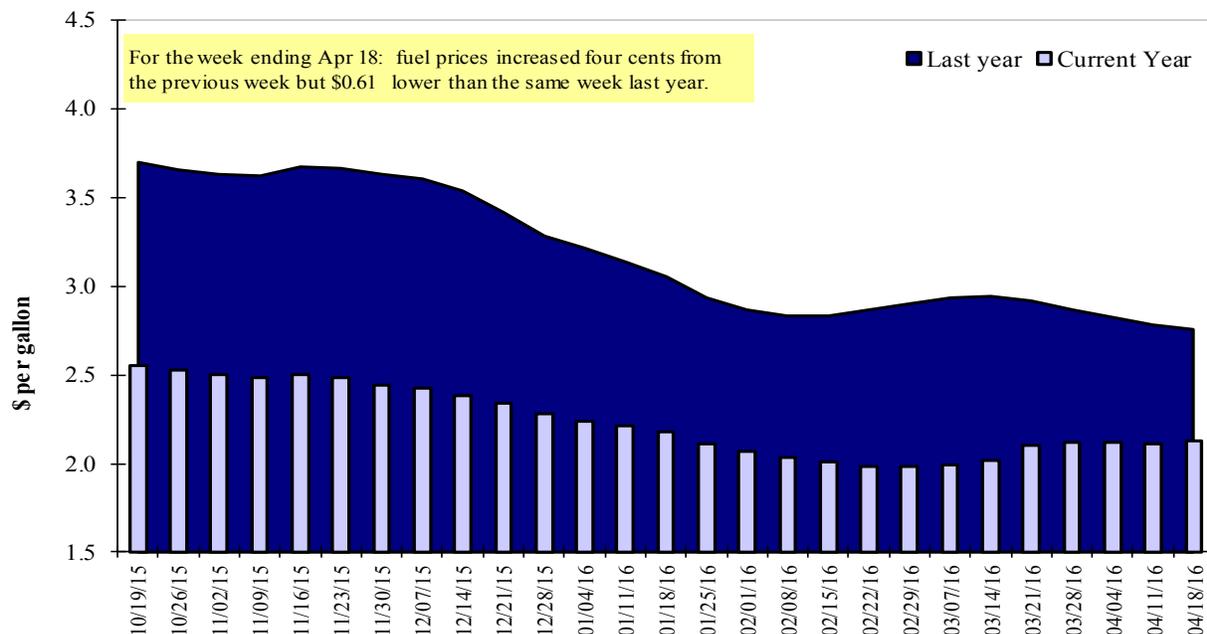
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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)

For the week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances¹									
4/7/2016	717	369	1,166	655	112	3,018	12,743	3,410	19,171
This week year ago	1,249	599	1,379	645	89	3,961	14,085	3,553	21,598
Cumulative exports-marketing year²									
2015/16 YTD	4,715	2,754	5,246	3,004	585	16,304	20,981	41,499	78,784
2014/15 YTD	6,022	3,163	6,257	3,281	595	19,318	24,532	44,958	88,807
YTD 2015/16 as % of 2014/15	78	87	84	92	98	84	86	92	89
Last 4 wks as % of same period 2014/15	66	61	97	117	112	86	91	95	91
2014/15 Total	7,009	3,654	7,250	3,758	665	22,336	45,205	49,614	117,155
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309

¹ Current unshipped (outstanding) export sales to date

² Shipped export sales to date; 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 Importers¹ of U.S. Corn

For the week ending 4/07/2016	Commitments ²		% change current MY from last MY	Exports ³ 3-year avg 2011-2013
	2015/16 Current MY	2014/15 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	6,144	8,425	(27)	10,079
Mexico	10,964	9,289	18	8,145
Korea	1,280	2,693	(52)	2,965
Colombia	3,861	3,320	16	3,461
Taiwan	1,073	1,382	(22)	1,238
Top 5 Importers	23,322	25,109	(7)	25,887
Total US corn export sales	33,724	38,616	(13)	34,445
% of Projected	80%	81%		
Change from prior week	1,136	588		
Top 5 importers' share of U.S. corn export sales	69%	65%		75%
USDA forecast, April 2016	41,985	47,430	(11)	
Corn Use for Ethanol USDA forecast, April 2016	133,350	132,080	1	

(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 Ranking Reports - <http://apps.fas.usda.gov/export-sales/myrkaug.htm>; 3-yr average

Table 14

Top 5 Importers¹ of U.S. Soybeans

For the week ending 4/07/2016	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg. 2011-13
	2015/16 Current MY	2014/15 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	26,847	29,665	(9)	24,211
Mexico	2,960	2,921	1	2,971
Indonesia	1,378	1,556	(11)	1,895
Japan	1,886	1,596	18	1,750
Taiwan	1,120	1,122	(0)	1,055
Top 5 importers	34,191	36,859	(7)	31,882
Total US soybean export sales	44,909	48,511	(7)	39,169
% of Projected	97%	97%		
Change from prior week	456	312		
Top 5 importers' share of U.S. soybean export sales	76%	76%		81%
USDA forecast, April 2016	46,458	50,218	(7)	

(n) indicates negative number.

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

Table 15

Top 10 Importers¹ of All U.S. Wheat

For the week ending 4/07/2016	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2012-2014
	2015/16 Current MY	2014/15 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,323	2,964	(22)	3,113
Mexico	2,214	2,717	(19)	2,807
Nigeria	1,429	1,959	(27)	2,512
Philippines	2,089	2,305	(9)	2,105
Brazil	427	1,534	(72)	2,091
Korea	1,131	1,212	(7)	1,273
Taiwan	990	986	0	1,007
Indonesia	459	635	(28)	751
Colombia	613	553	11	662
Thailand	555	667		618
Top 10 importers	11,674	14,864	(21)	16,939
Total US wheat export sales	19,322	23,278	(17)	26,361
% of Projected	91%	100%		
Change from prior week	125	48		
Top 10 importers' share of U.S. wheat export sales	60%	64%		64%
USDA forecast, April 2016	21,117	23,270	(9)	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
<http://www.fas.usda.gov/esrquery/>³FAS 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	For the Week Ending 04/14/16	Previous Week*	Current Week as % of Previous	2016 YTD*	2015 YTD*	2016 YTD as % of 2015 YTD	Last 4-weeks as % of:		2015 Total*
							Last Year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	264	260	102	3,401	3,583	95	117	91	10,985
Corn	237	362	65	2,327	3,060	76	96	132	7,232
Soybeans	12	0	n/a	4,390	4,034	109	38	52	11,809
Total	512	622	82	10,119	10,677	95	86	96	30,027
Mississippi Gulf									
Wheat	73	54	135	999	1,241	80	56	42	4,504
Corn	641	557	115	7,729	7,924	98	124	108	26,701
Soybeans	169	340	50	8,598	8,936	96	100	117	29,593
Total	883	951	93	17,325	18,101	96	109	100	60,797
Texas Gulf									
Wheat	92	0	n/a	827	1,153	72	55	40	3,724
Corn	0	32	0	251	149	169	274	280	596
Soybeans	0	0	n/a	92	210	44	n/a	n/a	864
Total	92	32	283	1,170	1,512	77	68	49	5,184
Interior									
Wheat	52	33	157	384	413	93	78	100	1,388
Corn	190	151	126	1,780	1,619	110	129	144	6,201
Soybeans	73	61	119	1,206	1,167	103	122	96	3,518
Total	315	245	129	3,371	3,199	105	118	120	11,106
Great Lakes									
Wheat	0	11	0	11	34	31	47	30	997
Corn	0	0	n/a	0	24	0	0	0	485
Soybeans	0	0	n/a	0	6	0	0	0	733
Total	0	11	0	11	64	16	20	23	2,216
Atlantic									
Wheat	0	1	17	126	226	56	31	64	520
Corn	0	0	n/a	14	28	49	25	9	277
Soybeans	17	5	310	810	838	97	159	150	2,053
Total	17	7	249	950	1,092	87	81	87	2,850
U.S. total from ports**									
Wheat	481	359	134	5,748	6,650	86	83	67	22,118
Corn	1,068	1,102	97	12,101	12,804	95	115	117	41,492
Soybeans	270	407	66	15,097	15,191	99	79	92	48,570
Total	1,819	1,867	97	32,945	34,646	95	98	96	112,180

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

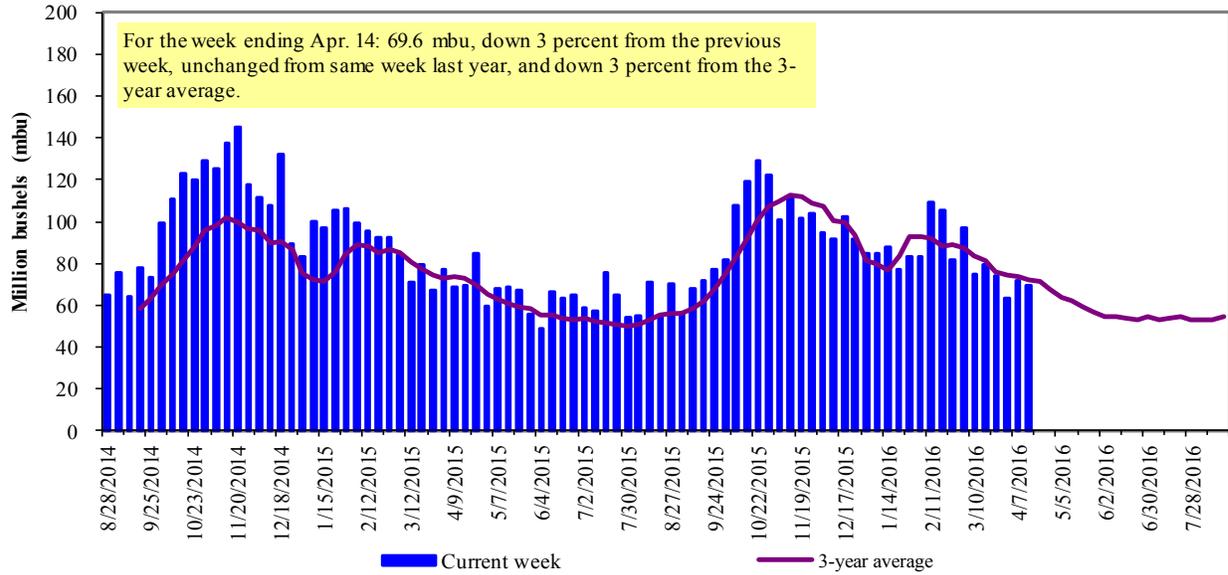
**Total only includes regions shown above

Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); YTD= year-to-date; n/a = not applicable

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 59 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2015.

Figure 14

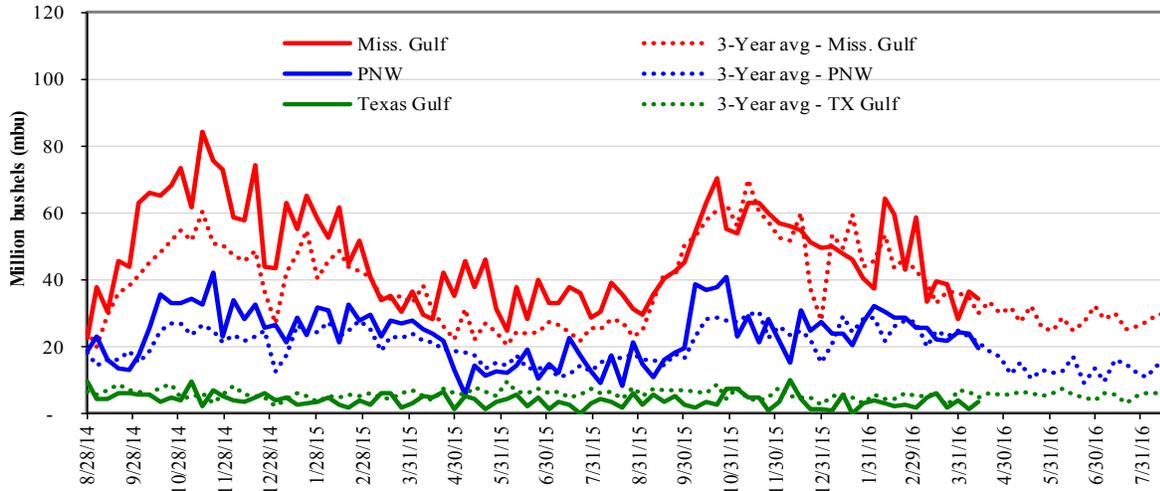
U.S. grain inspected for export (wheat, corn, and soybeans)



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)



Week ending 04/14/16 inspections (mbu):		Percent change from:				
Mississippi Gulf:	34.1	Last Week:	MS Gulf down 6	TX Gulf up 164	U.S. Gulf unchanged	PNW down 18
PNW:	19.4	Last Year (same week):	up 21	down 31	up 13	down 18
Texas Gulf:	3.4	3-yr avg. (4-wk. mov. Avg):	unchanged	down 33	down 5	down 16

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

Ocean Transportation

Table 17

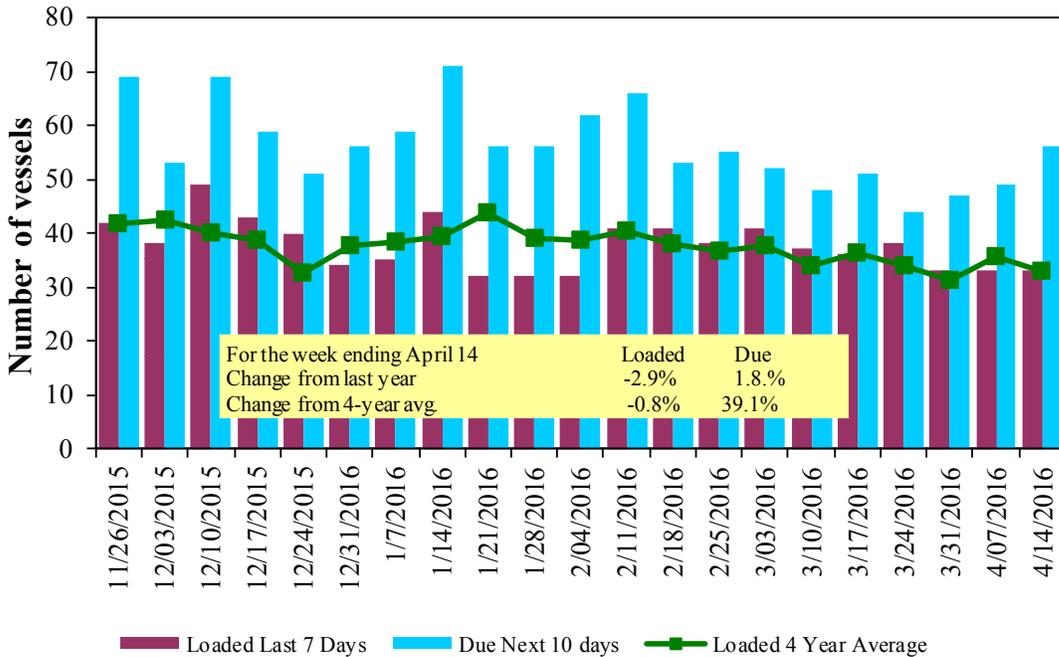
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
4/14/2016	33	33	56	16	n/a
4/7/2016	34	33	49	12	n/a
2015 range	(25..54)	(28..54)	(36..80)	(3..26)	n/a
2015 avg.	42	38	56	11	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

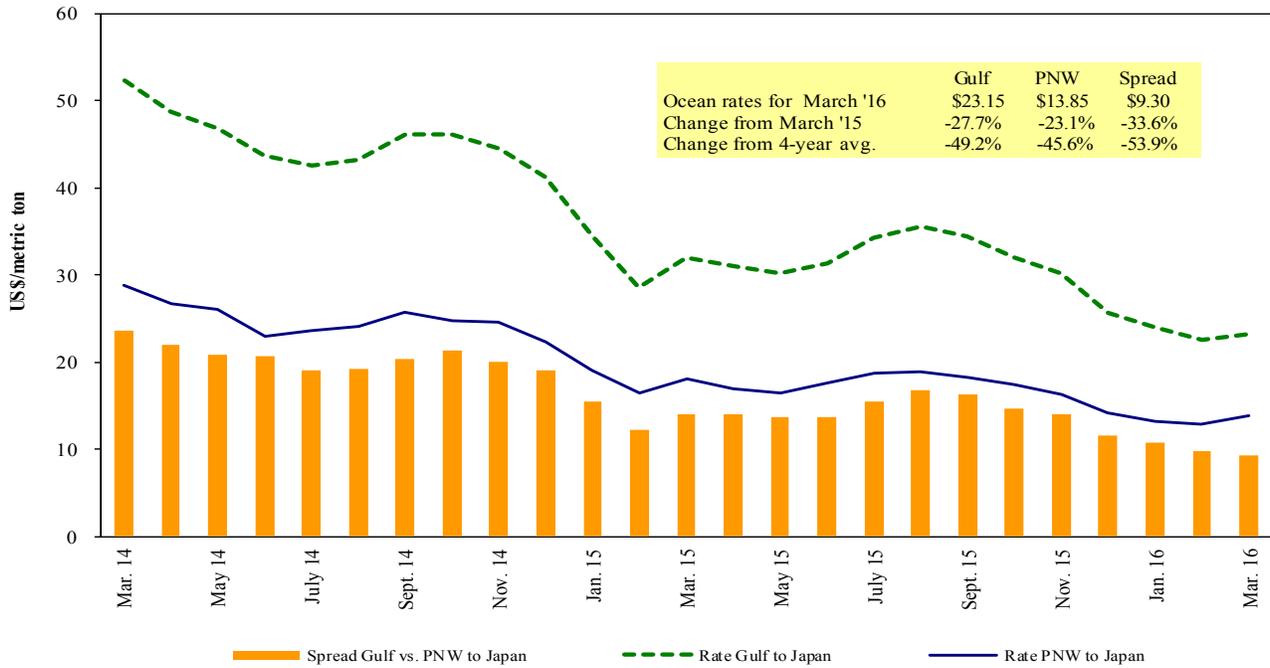
U.S. Gulf¹ Vessel Loading Activity



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

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 04/16/2016

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Japan	Heavy Grain	Apr 5/18	52,000	21.25
U.S. Gulf	Japan	Heavy Grain	Apr 1/5	50,000	22.20
U.S. Gulf	Djibouti	Wheat ¹	Apr 4/14	34,000	128.76
U.S. Gulf	Djibouti	Sorghum	Apr 18/28	15,000	64.63
PNW	Algeria	Wheat	Feb 10/20	51,500	13.15
Brazil	China	Heavy Grain	May 1/20	60,000	15.50
Brazil	China	Heavy Grain	May 1/16	66,000	15.25
Brazil	China	Heavy Grain	May 1/15	66,000	15.50
Brazil	China	Heavy Grain	May 1/10	60,000	16.65
Brazil	China	Heavy Grain	May 1/6	60,000	14.75
Brazil	China	Heavy Grain	April 20/30	60,000	17.50
Brazil	China	Heavy Grain	Apr 15/24	60,000	14.50
Brazil	China	Heavy Grain	Apr 1/10	60,000	14.00
Brazil	China	Heavy Grain	Apr 1/10	60,000	13.90
Brazil	Iran	Soybean Meal	Apr 11/14	54,000	21.50
EC S America	China	Heavy Grain	May/June	60,000	14.75
Uruguay	Portugal	Soybeans	Apr 15/20	30,000	17.50

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

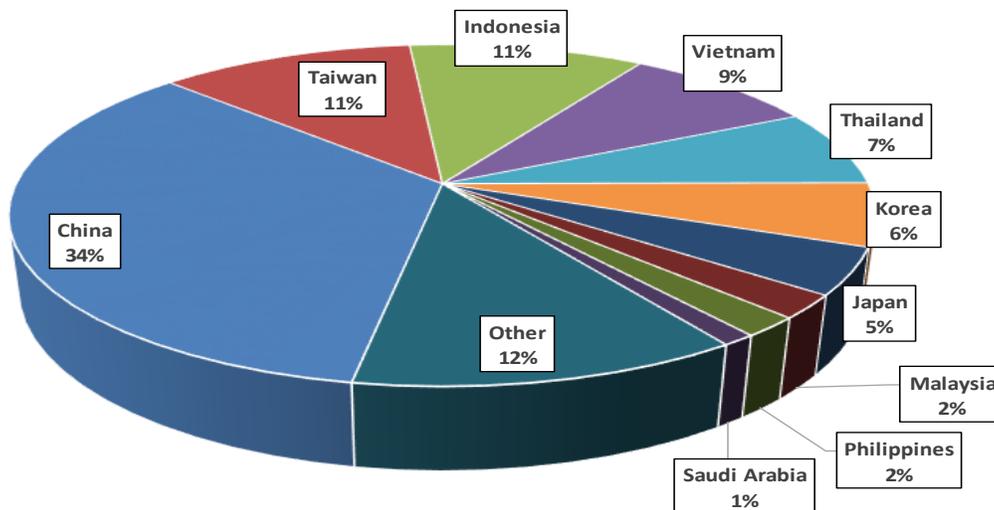
¹ 50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2014, containers were used to transport 7 percent of total U.S. waterborne grain exports. Approximately 63 percent of U.S. waterborne grain exports in 2014 went to Asia, of which 11 percent were moved in containers. Approximately 95 percent of U.S. waterborne containerized grain exports were destined for Asia.

Figure 18

Top 10 Destination Markets for U.S. Containerized Grain Exports, January–December 2015

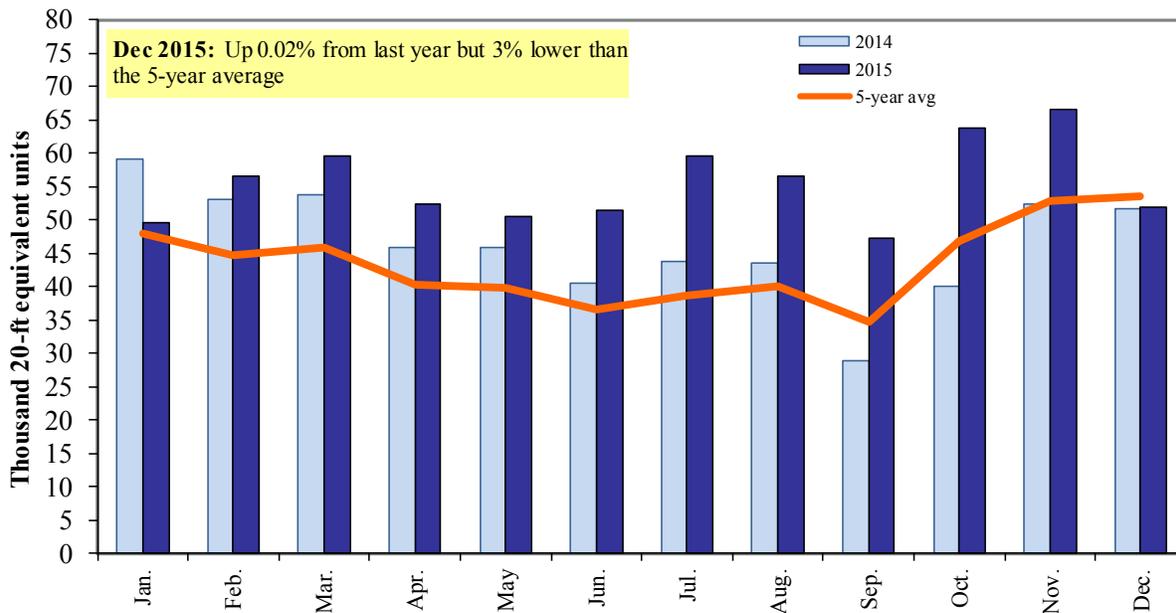


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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.

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