United States Department of Agriculture

Grain Transportation Report

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

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September 3, 2015

Contents

The next release is September 10, 2015

WEEKLY HIGHLIGHTS

Wheat and Corn Boost Total Grain Inspections

For the week ending August 27, **total inspections of grain** (corn, wheat, soybeans) from all major export regions reached 1.81 million metric tons (mmt), up 28 percent from the past week, up 6 percent from last year, and 21 percent below the 3-year average. The jump in total grain inspections was helped by a 90 percent increase in wheat inspections and a 14 percent increase in corn inspections. Wheat shipments rebounded to Asia, South America, and Nigeria. Grain inspections rebounded in the Pacific Northwest (PNW), increasing 181 percent from the past week. Inspections also jumped by 239 percent in the Texas Gulf, but dropped 13 percent in the Mississippi Gulf due mainly to a decrease in soybean inspections. Outstanding (unshipped) export sales of wheat and corn were up from the previous week but soybean sales were down for the same.

Panama Canal Suspends Draft Restrictions

On August 21 and 27, the Panama Canal Authority (ACP) announced the postponement of the second draft restriction and suspension of the previously announced draft restriction issued on August 7 (see 08/13/15 Grain Transportation Report (GTR). The first announced draft restriction was scheduled to go into effect on September 8, while the second restriction was tentatively scheduled for September 15. The restrictions were scheduled because of regional drought effects of El Nino, which caused the water levels in the Gatun and Alajuela Lakes that feed water into the Canal to substantially fall below their seasonal average. ACP decided to suspend the restrictions due to improvement in the amount of rainfall received in the Canal watershed during the last few days and water conservation methods. Until further notice, the Canal will operate at the maximum approved draft of 12.04 meters (39.5ft) instead of restricted level of 11.89 meters (39ft). The ACP may reintroduce the restrictions with 4 weeks advance notice, if necessary.

Barge Rates Increase as Corn Harvest Continues in Southern States

As of September 1, percent of tariff barge rates at various locations increased 3 to 35 percent compared to last week as the corn harvest continues in the southern States. The largest percent increase was in the Cairo, IL, to Memphis, TN, area on the lower Mississippi River where rates increased 35 percent to 405 percent of tariff ($12.72 per ton). The smallest percent increase was in the Minneapolis-St. Paul, MN, area where rates increased to 407 percent of tariff ($25.19 per ton), from 393 percent of tariff ($24.33/ton). As of August 30, the corn harvest in Louisiana and Mississippi was 92 and 68 percent completed, respectively. In both States the harvest pace is ahead of the 5-year average of 85 percent for Louisiana of and 57 percent for Mississippi. The Arkansas corn crop is 44 percent harvested and is slightly below the 5-year average pace of 47 percent.

Snapshots by Sector

Export Sales

During the week ending August 20, **unshipped balances** of wheat, corn, and soybeans totaled 9.8 mmt, down 4 percent from the same time last year. Net weekly **wheat export sales** of 0.529 mmt were up 69 percent from the prior week. **Corn export sales** were 0.132 mmt, down 53 percent from the prior week, and **soybean net export sales** were also 0.132 mmt, down significantly from the past week.

Rail

U.S. Class I railroads originated 18,268 **carloads of grain** during the week ending August 22, down 7 percent from last week, down 2 percent from last year, and up 3 percent from the 3-year average.

During the week ending August 27, average September shuttle **secondary railcar bids/offers per car** were $260 below tariff, down $73 from last week, and $1,378 lower than last year. Non-shuttle secondary railcar bids/offers were $130 below tariff, down $33 from last week, and $730 lower than last year.

Barge

During the week ending August 29, **barge grain movements** totaled 575,500 tons, down 11 percent from last week, and down 8 percent from the same period last year.

During the week ending August 29, 380 grain barges **moved down river**, down 8 percent from last week; 496 grain barges were **unloaded in New Orleans**, 18 percent down from the previous week.

Ocean

During the week ending August 27, 35 **ocean-going grain vessels** were loaded in the Gulf, 40 percent more than the same period last year. Forty-seven vessels are expected to be loaded within the next 10 days, 2 percent less than the same period last year.

During the week ending August 28, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $36 per metric ton (mt), unchanged from the previous week. The cost of shipping from the PNW to Japan was $19 per mt, down 1 percent from the previous week.

Fuel

During the week ending August 31, U.S. average **diesel fuel prices** decreased 5 cents from the previous week to $2.51 per gallon—down $1.30 from the same week last year.

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Feature Article/Calendar

Second Quarter Corn and Soybean Transportation Costs Down from Last Year

Second quarter 2015 transportation costs for shipping corn and soybeans to Japan through the U.S. Gulf and Pacific Northwest (PNW) port regions decreased notably from the same time last year. The drop was due primarily to a significant drop in ocean and trucking rates from year to year (*Tables1, 2*). Ocean rates continued to fall in the PNW and Gulf because of slower activity and excess vessel supply (***Grain Transportation Report (GTR) 7/16/15***), while trucking rates dropped as trucking activity fell from year to year.

Year-to-year landed costs to ship corn and soybeans also decreased significantly due to the drop in transportation costs, and due to lower farm values for corn and soybeans. Quarter-to-quarter landed costs to ship from the PNW were also down due to lower rail and ocean rates, plus lower farm values. Rail rates for shipping corn and soybeans through the PNW decreased from quarter to quarter and from year to year, as fuel surcharges continued to decrease. Second-quarter barge rates for shipping grain from the Gulf remained about the same as last year because demand for barge services remained low (***GTR 7/23/15***).

Table 1: Cost of Shipping Corn and Soybeans from Minneapolis to Japan through the U.S. Gulf

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent Change	
	2ndQtr 14	1stQtr 15	2ndQtr 15	Yr. to Yr.	Qtr to Qtr	2ndQtr 14	1stQtr 15	2ndQtr 15	Yr. to Yr.	Qtr to Qtr
Truck	14.59	12.03	12.02	-17.61	-0.08	14.59	12.03	12.02	-17.61	-0.08
Barge	30.44	n/a	30.50	0.20	n/a	30.44	n/a	30.50	0.20	n/a
Ocean	46.39	31.71	30.86	-33.48	-2.68	46.39	31.71	30.86	-33.48	-2.68
Total Transportation Cost	91.42	43.74	73.38	-19.73	n/a	91.42	43.74	73.38	-19.73	n/a
Farm Value [1]	174.40	148.48	139.36	-20.09	-6.14	522.99	361.31	350.66	-32.95	-2.95
Total Landed Cost	265.82	192.22	212.74	-19.97	n/a	614.41	405.05	424.04	-30.98	n/a
Transportation % Landed Cost	34.39	22.76	34.49			14.88	10.80	17.30		

Table 2: Cost of Shipping Corn and Soybeans from Minneapolis to Japan through the U.S. PNW

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent Change	
	2ndQtr 14	1stQtr 15	2ndQtr 15	Yr. to Yr.	Qtr to Qtr	2ndQtr 14	1stQtr 15	2ndQtr 15	Yr. to Yr.	Qtr to Qtr
Truck	14.59	12.03	12.02	-17.61	-0.08	14.59	12.03	12.02	-17.61	-0.08
Rail [2]	56.41	54.29	49.17	-12.83	-9.43	61.67	58.90	57.76	-6.34	-1.94
Ocean	25.25	17.83	17.04	-32.51	-4.43	25.25	17.83	17.04	-32.51	-4.43
Total Transportation Cost	96.25	84.15	78.23	-18.72	-7.04	101.51	88.76	86.82	-14.47	-2.19
Farm Value [1]	174.40	148.48	139.36	-20.09	-6.14	522.99	361.31	350.66	-32.95	-2.95
Total Landed Cost	270.65	232.63	217.59	-19.60	-6.47	624.50	450.07	437.48	-29.95	-2.80
Transportation % Landed Cost	35.56	36.17	35.95			16.25	19.72	19.85		

Source: USDA/AMS/TMP
n/a = not available

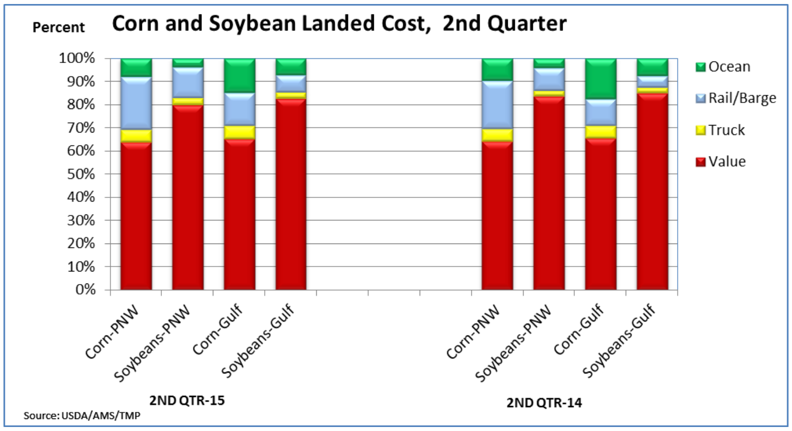
[1] Source: USDA/NASS, Agricultural Prices

[2] Rail tariffs include fuel surcharges and revisions for heavy axle rail cars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car

U.S. Gulf Costs: Total second quarter transportation costs for shipping corn and soybeans from Minneapolis, MN, through the Gulf to Japan decreased 20 percent year to year (*Table 1*). Lower trucking and ocean rates caused the drop in year-to-year transportation costs. Ocean rates for shipping from the Gulf continued to fall quarter to quarter because vessel supplies remained higher.

Year-to-year total landed costs for shipping from the U.S. Gulf to Japan decreased 20 percent for corn and 31 percent for soybeans. Year-to-year Gulf landed costs decreased mainly due to lower trucking and ocean rates, and decreased farm values. Landed costs to ship grain from the Gulf were $213 per metric ton (mt) for corn and $424 per mt for soybeans. Second-quarter corn and soybean farm values accounted for 65 and 80 percent of the landed costs for shipping through the Gulf, below last year (see figure). Transportation costs for shipping corn through the Gulf to Japan accounted for 34 percent of the total landed costs during the second quarter, up slightly from last year. Soybean transportation costs accounted for 17 percent of the landed cost, above last year at this time (*Table 1*).

Pacific Northwest Costs: Total transportation costs for shipping grain from Minneapolis, MN, to Japan via the PNW decreased 7 percent for corn and 2 percent for soybeans from quarter to quarter (*Table 2*). Year-to-year transportation costs for shipping corn and soybeans to the PNW decreased 19 percent for corn and 14 percent for soybeans as rail and ocean rates decreased. Rail rates for shipping corn and soybeans to the PNW decreased 9 and 2 percent quarter to quarter, and 13 and 6 percent year to year. PNW ocean rates decreased 4 percent quarter to quarter and 33 percent year to year.



Lower rail and ocean rates caused quarter-to-quarter total landed costs to decrease 6 percent for shipping corn through the PNW and 3 percent for shipping soybeans. Farm values, which also dropped 6 percent for corn and 3 percent for soybeans, contributed to lower total landed costs. Year-to-year landed costs, however, for shipping corn and soybeans through the PNW to Japan decreased 20 and 30 percent. The landed costs ranged from $218 per mt for corn and $437 per mt for soybeans (*Table 2*). Transportation costs for corn shipped through the PNW accounted for about 36 percent of the total landed cost during the second quarter, slightly below the previous quarter but slightly above last year. Corn farm value accounted for 64 percent of the landed cost for shipping through the PNW, equal to the previous quarter and last year. Soybean transportation costs accounted for 20 percent of the total landed cost, above the previous quarter and last year. Second quarter soybean farm value was 3 percent below the previous quarter and 33 percent below last year. Soybean farm value accounted for 80 percent of the total landed cost for shipping through the PNW, equal to the previous quarter but below last year (*see figure* above). *johnny.hill@ams.usda.gov*

Grain Transportation Indicators

Table 1
Grain Transport Cost Indicators[1]

Week ending	Truck	Rail: Unit Train	Rail: Shuttle	Barge	Ocean: Gulf	Ocean: Pacific
09/02/15	169	243	200	222	161	135
08/26/15	172	247	204	189	161	137

[1]Indicator: 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

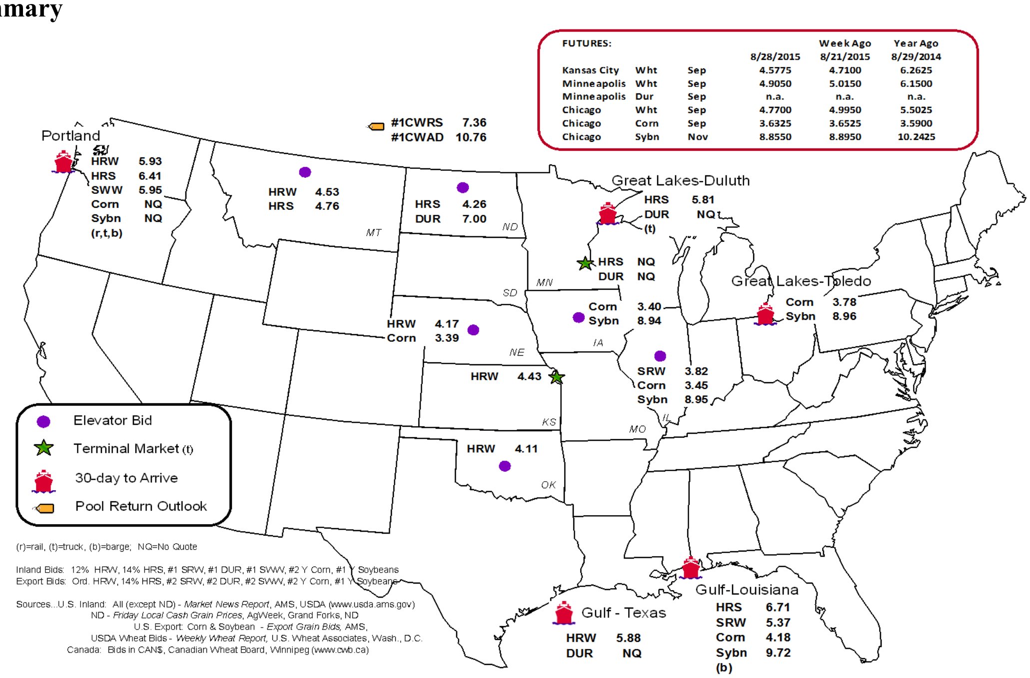
Table 2
Market Update: U.S. Origins to Export Position Price Spreads ($/bushel)

Commodity	Origin--Destination	8/28/2015	8/21/2015
Corn	IL--Gulf	-0.73	-0.61
Corn	NE--Gulf	-0.79	-0.66
Soybean	IA--Gulf	-0.78	-0.80
HRW	KS--Gulf	-1.45	-1.40
HRS	ND--Portland	-2.15	-2.03

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	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-Border Mexico[3]
8/26/2015[p]	81	1,014	3,039	211	4,345	8/22/2015	1,964
8/19/2015[r]	136	810	2,731	114	3,791	8/15/2015	1,939
2015 YTD[r]	12,856	40,368	137,120	14,882	205,226	2015 YTD	60,875
2014 YTD[r]	21,058	55,727	150,684	17,500	244,969	2014 YTD	64,073
2015 YTD as % of 2014 YTD	61	72	91	85	84	% change YTD	95
Last 4 weeks as % of 2014[2]	61	59	72	43	66	Last 4wks % 2014	114
Last 4 weeks as % of 4-year avg.[2]	50	68	85	70	79	Last 4wks % 4 yr	125
Total 2014	44,621	83,674	256,670	32,107	417,072	Total 2014	96,467
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	71,397

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2013 and prior 4-year average.

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

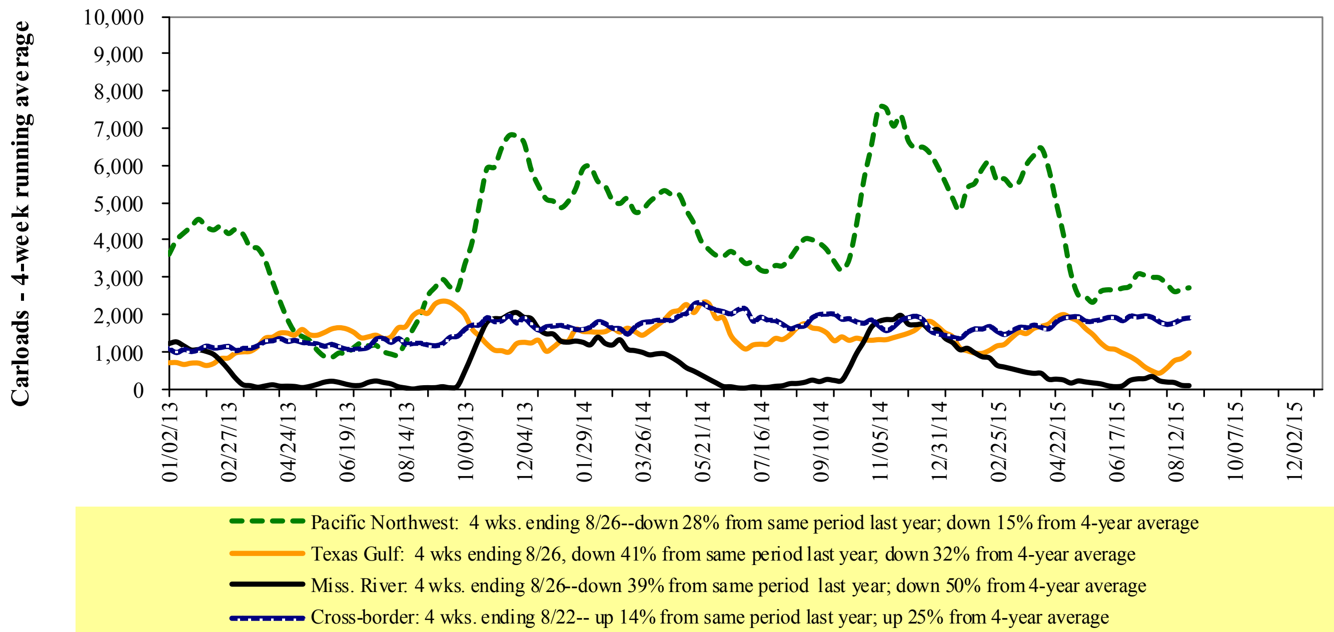
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)

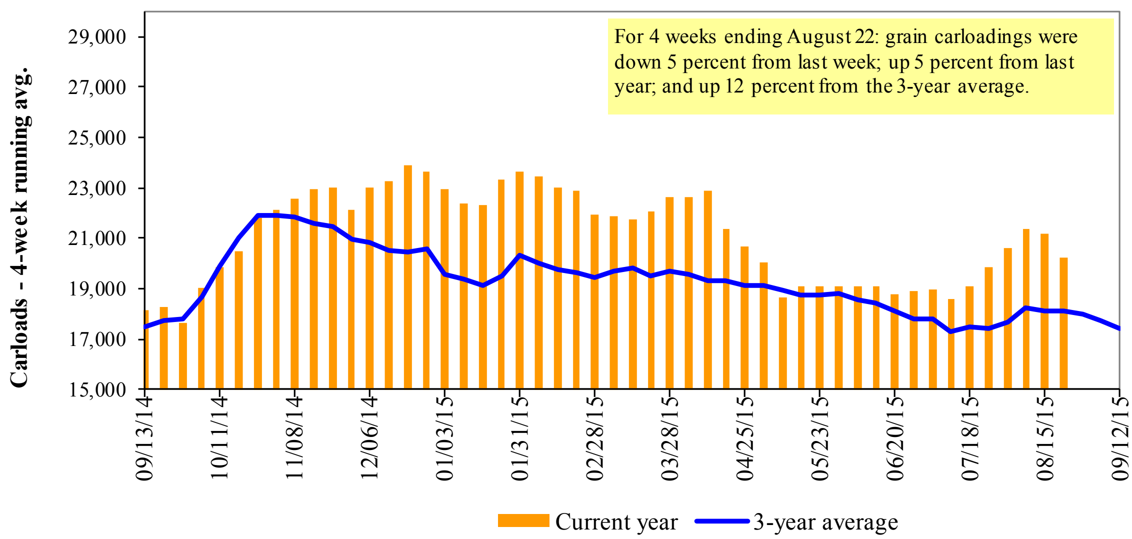
Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
08/22/15	1,513	2,109	9,256	726	4,664	18,268	3,306	4,598
This week last year	1,600	2,369	8,877	742	5,133	18,721	4,271	5,696
2015 YTD	66,732	97,339	324,923	28,638	168,786	686,418	133,608	146,971
2014 YTD	61,053	96,295	287,667	27,492	186,461	658,968	146,499	175,447
2015 YTD as % of 2014 YTD	109	101	113	104	91	104	91	84
Last 4 weeks as % of 2014[1]	115	94	115	118	90	105	77	87
Last 4 weeks as % of 3-yr avg.[2]	149	106	110	125	110	112	92	91
Total 2014	103,331	153,771	482,431	47,510	297,969	1,085,012	242,616	276,322

[1]The past 4 weeks of this year as a percent of the same 4 weeks last year.

[2]The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date.

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 8/27/2015	Delivery period Sep-15	Sep-14	Oct-15	Oct-14	Nov-15	Nov-14	Dec-15	Dec-14
BNSF[3]								
COT grain units	no bids	no offer	0	no offer	no bids	no offer	no bids	no offer
COT grain single-car[5]	0 . . 11	no offer	0 . . 20	no offer	0	no offer	0	no offer
UP[4]								
GCAS/Region 1	no bids	no offer	no bids	1501	10	879	n/a	n/a
GCAS/Region 2	no bids	no offer	10	2109	no bids	962	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.

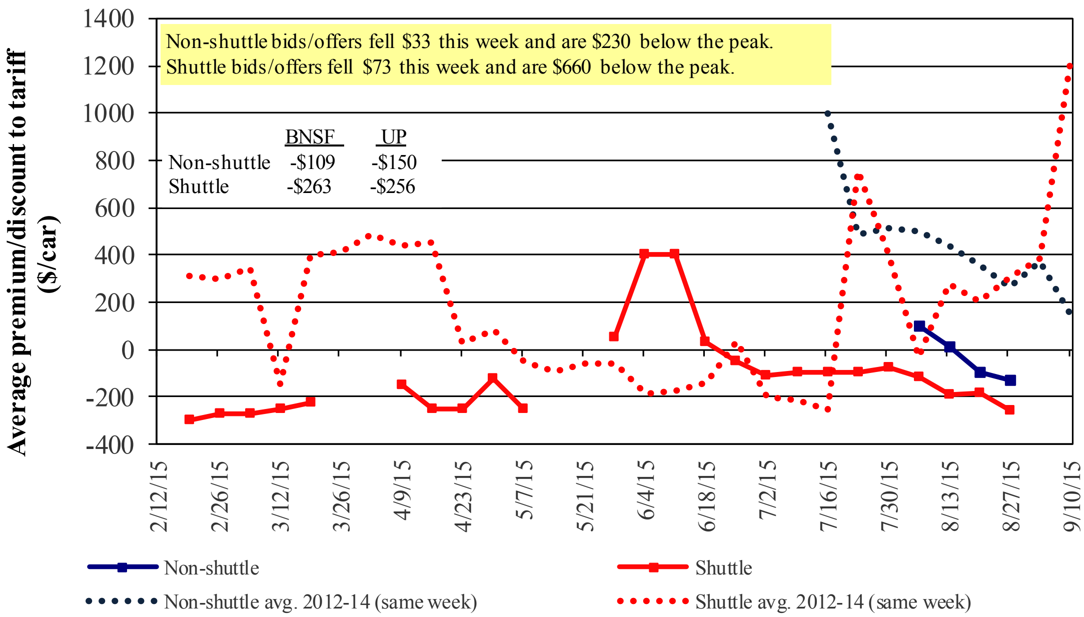
[5]Range is shown because average is not available. Not available = n/a.

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 5

Bids/Offers for Railcars to be Delivered in September 2015, Secondary Market

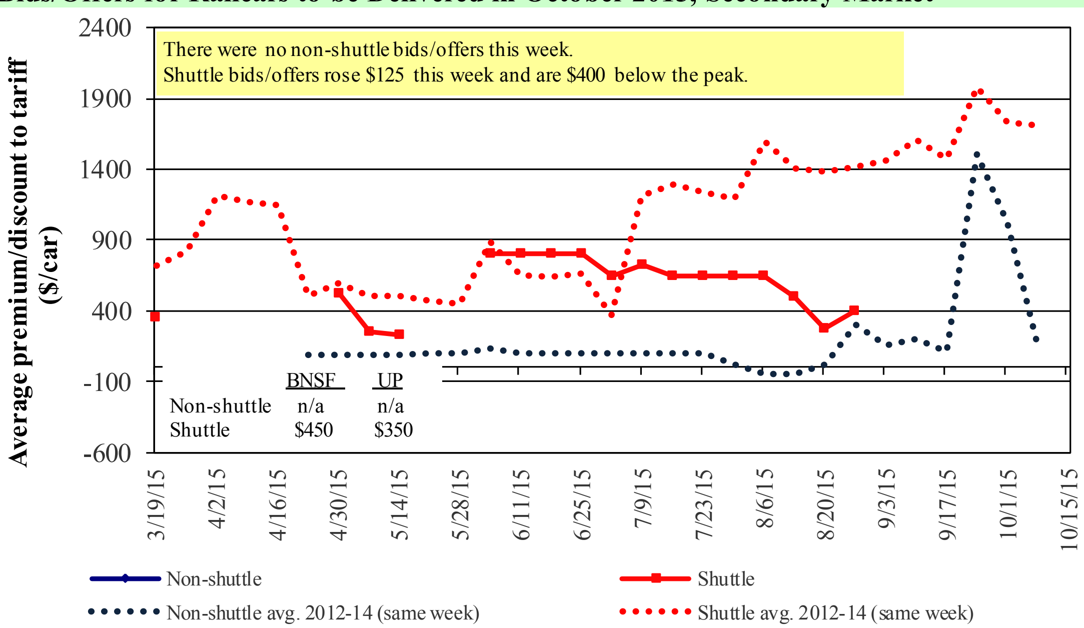


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in October 2015, Secondary Market

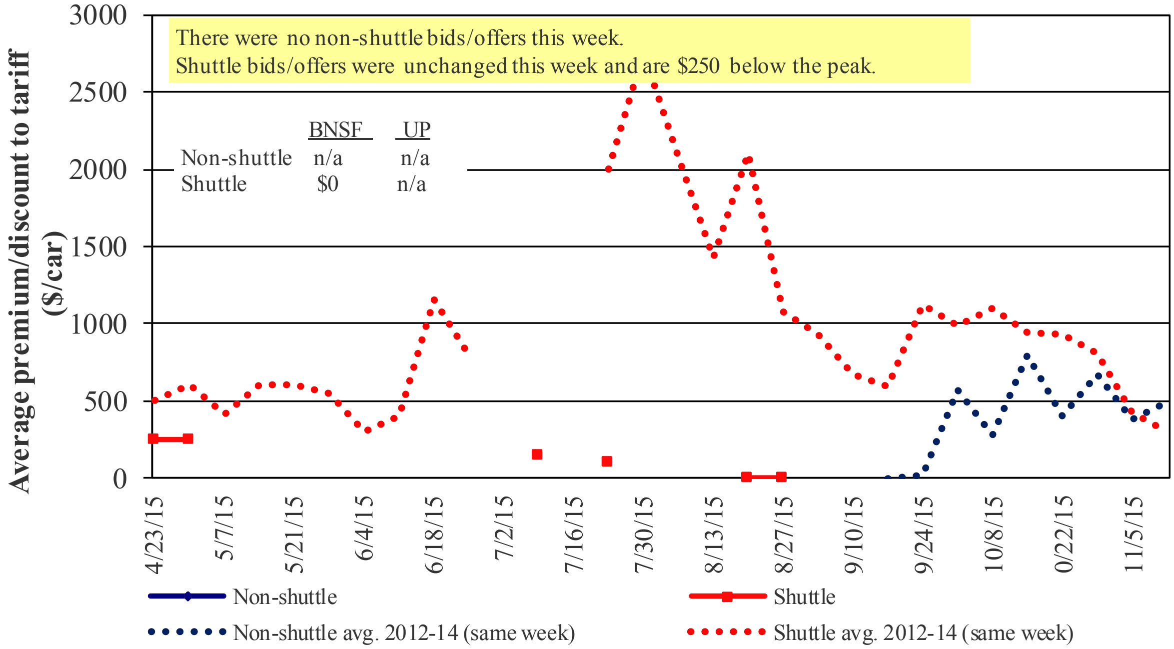


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 4

Bids/Offers for Railcars to be Delivered in November 2015, 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					
8/27/2015	Sep-15	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16
Non-shuttle						
BNSF-GF	(109)	n/a	n/a	n/a	n/a	n/a
Change from last week	(59)	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	(150)	n/a	n/a	n/a	n/a	n/a
Change from last week	(6)	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	(750)	n/a	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	(263)	450	-	n/a	n/a	n/a
Change from last week	(107)	-	-	n/a	n/a	n/a
Change from same week 2014	(1,886)	(3,100)	n/a	n/a	n/a	n/a
UP-Pool	(256)	350	n/a	n/a	n/a	n/a
Change from last week	(39)	250	n/a	n/a	n/a	n/a
Change from same week 2014	(869)	(2,650)	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 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 Shipments[1]

Effective date: 9/1/2015	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	$3,605	$71	$36.50	$0.99	3
	Grand Forks, ND	Duluth-Superior, MN	$3,563	$24	$35.62	$0.97	-3
	Wichita, KS	Los Angeles, CA	$6,950	$122	$70.23	$1.91	4
	Wichita, KS	New Orleans, LA	$4,243	$125	$43.37	$1.18	0
	Sioux Falls, SD	Galveston-Houston, TX	$6,486	$100	$65.41	$1.78	5
	Northwest KS	Galveston-Houston, TX	$4,511	$137	$46.15	$1.26	0
	Amarillo, TX	Los Angeles, CA	$4,710	$190	$48.66	$1.32	-2
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,328	$141	$34.45	$0.88	-2
	Toledo, OH	Raleigh, NC	$5,555	$0	$55.16	$1.40	9
	Des Moines, IA	Davenport, IA	$2,168	$30	$21.83	$0.55	2
	Indianapolis, IN	Atlanta, GA	$4,761	$0	$47.28	$1.20	9
	Indianapolis, IN	Knoxville, TN	$4,104	$0	$40.75	$1.04	12
	Des Moines, IA	Little Rock, AR	$3,308	$88	$33.72	$0.86	-1
	Des Moines, IA	Los Angeles, CA	$4,852	$255	$50.72	$1.29	-13
Soybeans	Minneapolis, MN	New Orleans, LA	$3,844	$127	$39.43	$1.07	0
	Toledo, OH	Huntsville, AL	$4,676	$0	$46.43	$1.26	17
	Indianapolis, IN	Raleigh, NC	$5,625	$0	$55.86	$1.52	9
	Indianapolis, IN	Huntsville, AL	$4,368	$0	$43.38	$1.18	22
	Champaign-Urbana, IL	New Orleans, LA	$3,974	$141	$40.86	$1.11	0
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,953	$70	$39.95	$1.09	1
	Wichita, KS	Galveston-Houston, TX	$3,919	$55	$39.46	$1.07	7
	Chicago, IL	Albany, NY	$4,723	$0	$46.90	$1.28	9
	Grand Forks, ND	Portland, OR	$5,611	$122	$56.93	$1.55	1
	Grand Forks, ND	Galveston-Houston, TX	$6,532	$127	$66.12	$1.80	0
	Northwest KS	Portland, OR	$5,478	$224	$56.62	$1.54	-2
Corn	Minneapolis, MN	Portland, OR	$5,180	$148	$52.91	$1.34	-6
	Sioux Falls, SD	Tacoma, WA	$5,130	$136	$52.29	$1.33	-5
	Champaign-Urbana, IL	New Orleans, LA	$3,147	$141	$32.65	$0.83	-3
	Lincoln, NE	Galveston-Houston, TX	$3,610	$79	$36.63	$0.93	-4
	Des Moines, IA	Amarillo, TX	$3,645	$110	$37.29	$0.95	-3
	Minneapolis, MN	Tacoma, WA	$5,180	$147	$52.90	$1.34	-6
	Council Bluffs, IA	Stockton, CA	$4,600	$152	$47.19	$1.20	-6
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,690	$136	$57.85	$1.57	-5
	Minneapolis, MN	Portland, OR	$5,710	$148	$58.17	$1.58	-5
	Fargo, ND	Tacoma, WA	$5,580	$121	$56.61	$1.54	-4
	Council Bluffs, IA	New Orleans, LA	$4,425	$162	$45.56	$1.24	0
	Toledo, OH	Huntsville, AL	$3,851	$0	$38.24	$1.04	22
	Grand Island, NE	Portland, OR	$5,360	$229	$55.50	$1.51	-2

[1]A 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.

[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

Commodity	Origin state	Destination region	Tariff rate/car[1]	Fuel surcharge per car[2]	Tariff plus surcharge per: metric ton[3]	Tariff plus surcharge per: bushel[3]	Percent change Y/Y[4]
Effective date: 9/1/2015							
Wheat	MT	Chihuahua, CI	$7,648	$129	$79.46	$2.16	11
	OK	Cuautitlan, EM	$6,714	$156	$70.19	$1.91	-2
	KS	Guadalajara, JA	$7,159	$151	$74.69	$2.03	-3
	TX	Salinas Victoria, NL	$4,086	$59	$42.35	$1.15	2
Corn	IA	Guadalajara, JA	$8,427	$178	$87.92	$2.23	-2
	SD	Celaya, GJ	$7,780	$168	$81.21	$2.06	-5
	NE	Queretaro, QA	$7,618	$158	$79.45	$2.02	-3
	SD	Salinas Victoria, NL	$6,035	$128	$62.97	$1.60	-4
	MO	Tlalnepantla, EM	$6,963	$153	$72.71	$1.85	-4
	SD	Torreon, CU	$7,050	$141	$73.47	$1.86	-2
Soybeans	MO	Bojay (Tula), HG	$8,365	$150	$87.00	$2.37	-1
	NE	Guadalajara, JA	$8,929	$171	$92.98	$2.53	-1
	IA	El Castillo, JA	$9,270	$167	$96.43	$2.62	-2
	KS	Torreon, CU	$7,226	$106	$74.92	$2.04	0
Sorghum	TX	Guadalajara, JA	$7,150	$110	$74.18	$1.88	-2
	NE	Celaya, GJ	$7,404	$153	$77.21	$1.96	-4
	KS	Queretaro, QA	$7,255	$96	$75.11	$1.91	4
	NE	Salinas Victoria, NL	$5,883	$112	$61.25	$1.55	2
	NE	Torreon, CU	$6,662	$125	$69.35	$1.76	0

[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

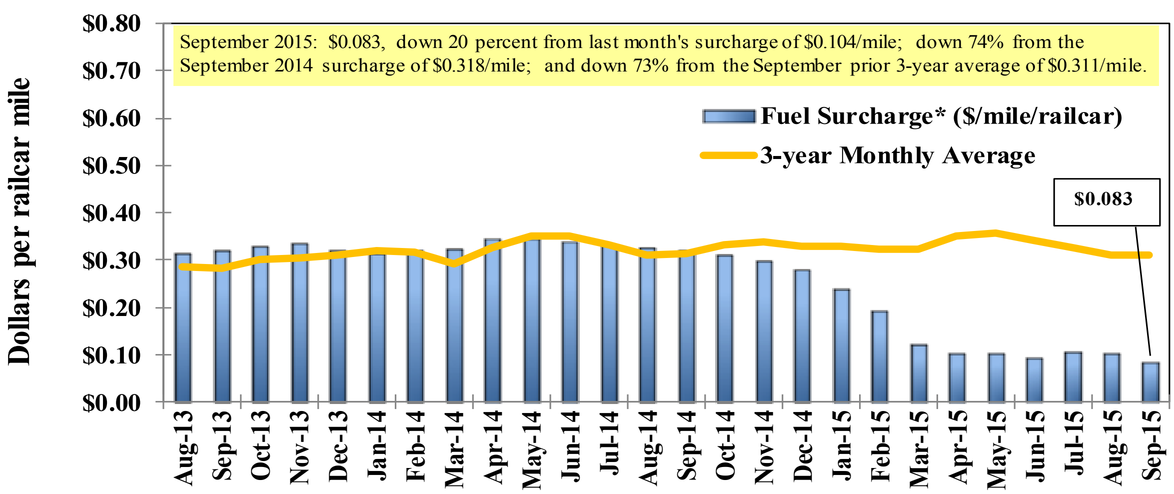
[3] Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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.

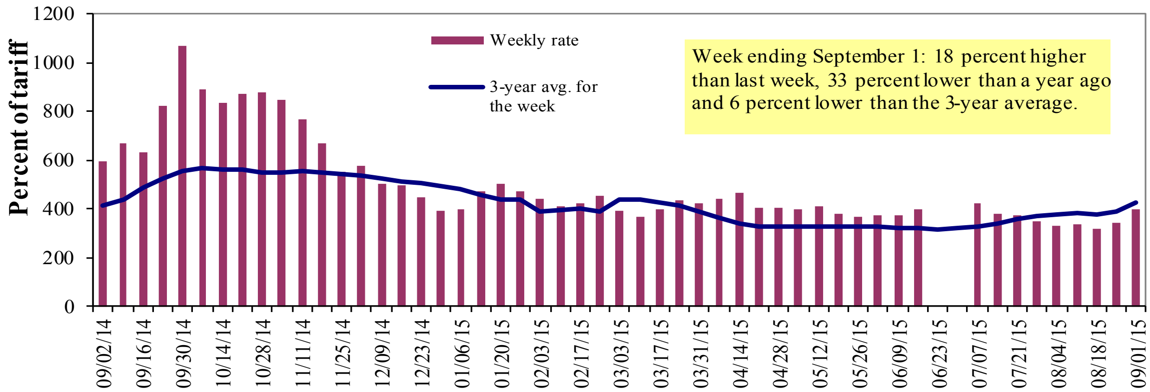
** BNSF strike price (diesel price when fuel surcharges begin) changed from $1.25/gal. to $2.50/gal. starting March 1, 2011.

***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]



[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]	9/1/2015	407	382	400	390	387	387	405
	8/25/2015	393	340	340	300	302	302	300
$/ton	9/1/2015	25.19	20.32	18.56	15.56	18.15	15.63	12.72
	8/25/2015	24.33	18.09	15.78	11.97	14.16	12.20	9.42
Current week % change from the same week:								
	Last year	-27	-35	-33	-33	-33	-33	-30
	3-year avg. [2]	-11	-12	-6	-5	-10	-10	-2
Rate[1]	October	620	608	608	545	610	610	525
	December	-	-	455	350	393	393	300

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

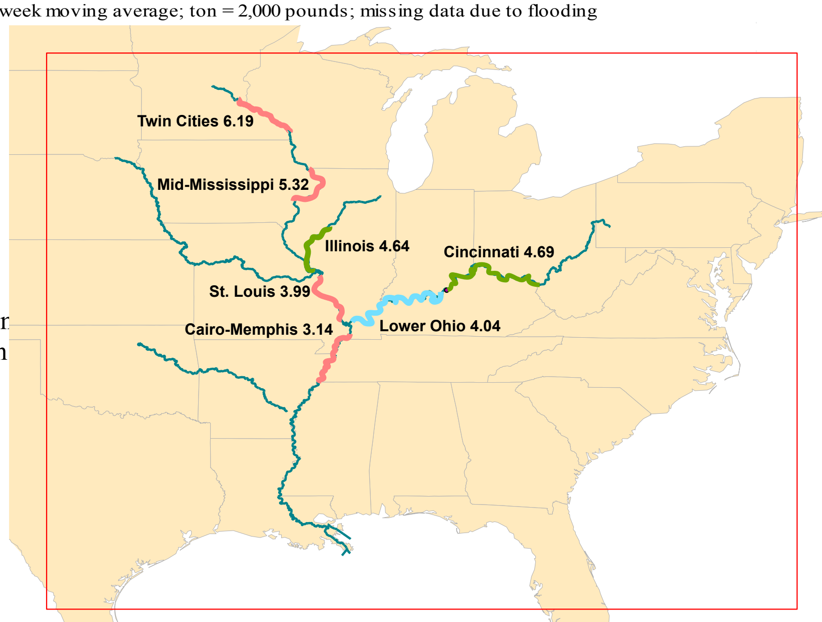
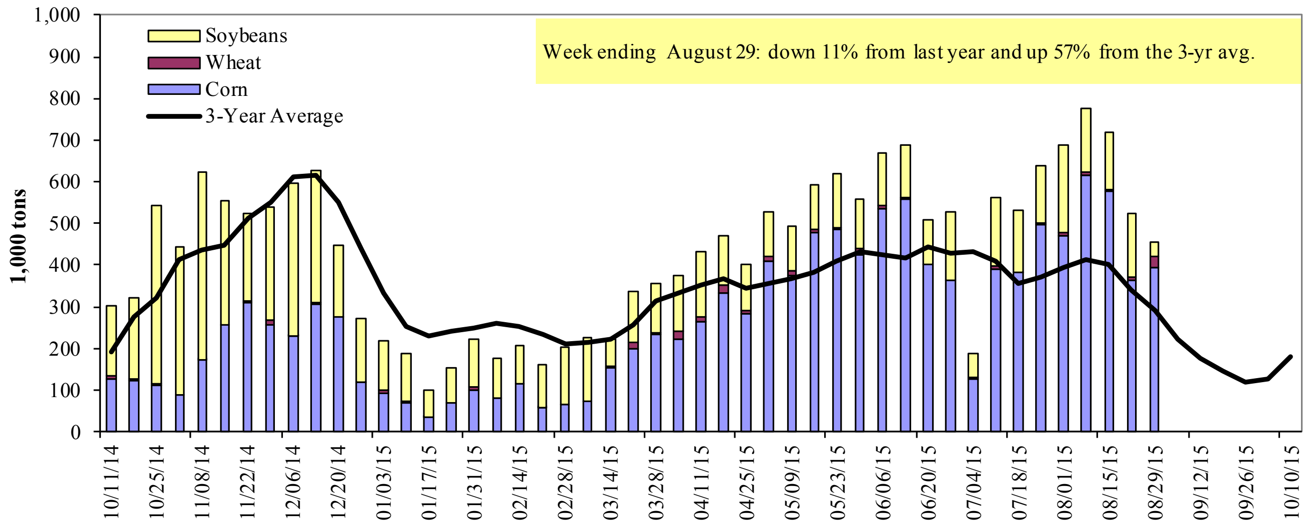


Figure 10

Barge Movements on the Mississippi 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

Table 10

Barge Grain Movements (1,000 tons)

Week ending 08/29/2015	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	89	19	14	0	122
Winfield, MO (L25)	251	19	27	0	297
Alton, IL (L26)	412	23	41	0	476
Granite City, IL (L27)	395	25	35	0	454
Illinois River (L8)	148	0	13	0	161
Ohio River (L52)	54	26	12	0	92
Arkansas River (L1)	0	24	6	0	29
Weekly total - 2015	449	75	52	0	576
Weekly total - 2014	524	117	66	9	623
2015 YTD[1]	14,841	1,329	6,685	160	23,015
2014 YTD	15,694	1,874	4,843	139	22,549
2015 as % of 2014 YTD	95	71	138	116	102
Last 4 weeks as % of 2014[2]	107	97	255	146	118
Total 2014	20,693	2,181	11,813	258	34,946

[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.

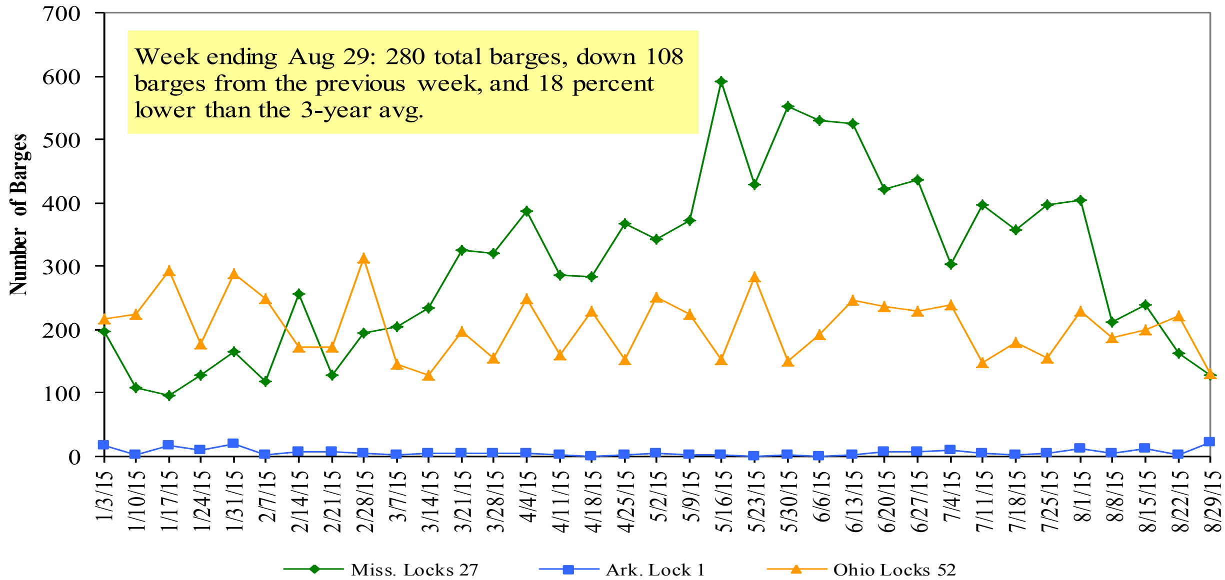
[2] As a percent of same period in 2014.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers

Figure 11

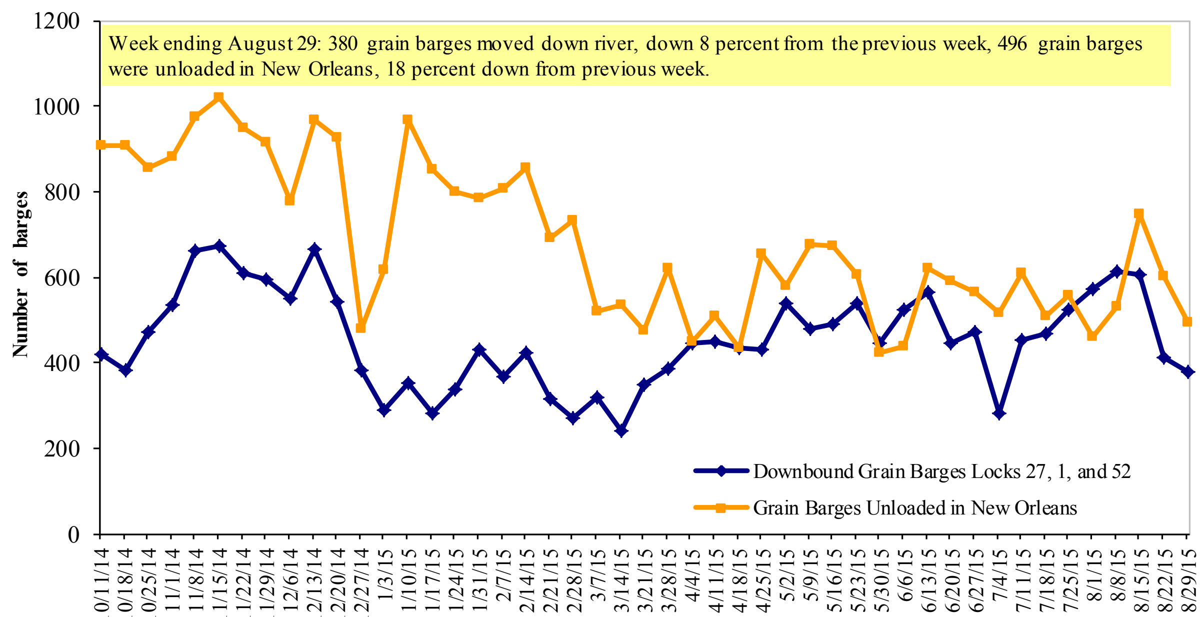
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 Prices[1], Week Ending 8/31/2015 (US $/gallon)

			Change from	
Region	**Location**	**Price**	**Week ago**	**Year ago**
I	East Coast	2.590	-0.057	-1.252
	New England	2.673	-0.066	-1.271
	Central Atlantic	2.714	-0.063	-1.211
	Lower Atlantic	2.478	-0.051	-1.278
II	Midwest[2]	2.443	-0.044	-1.309
III	Gulf Coast[3]	2.376	-0.038	-1.344
IV	Rocky Mountain	2.562	-0.030	-1.306
V	West Coast	2.723	-0.044	-1.307
	West Coast less California	2.564	-0.046	-1.409
	California	2.851	-0.043	-1.228
Total	U.S.	2.514	-0.047	-1.300

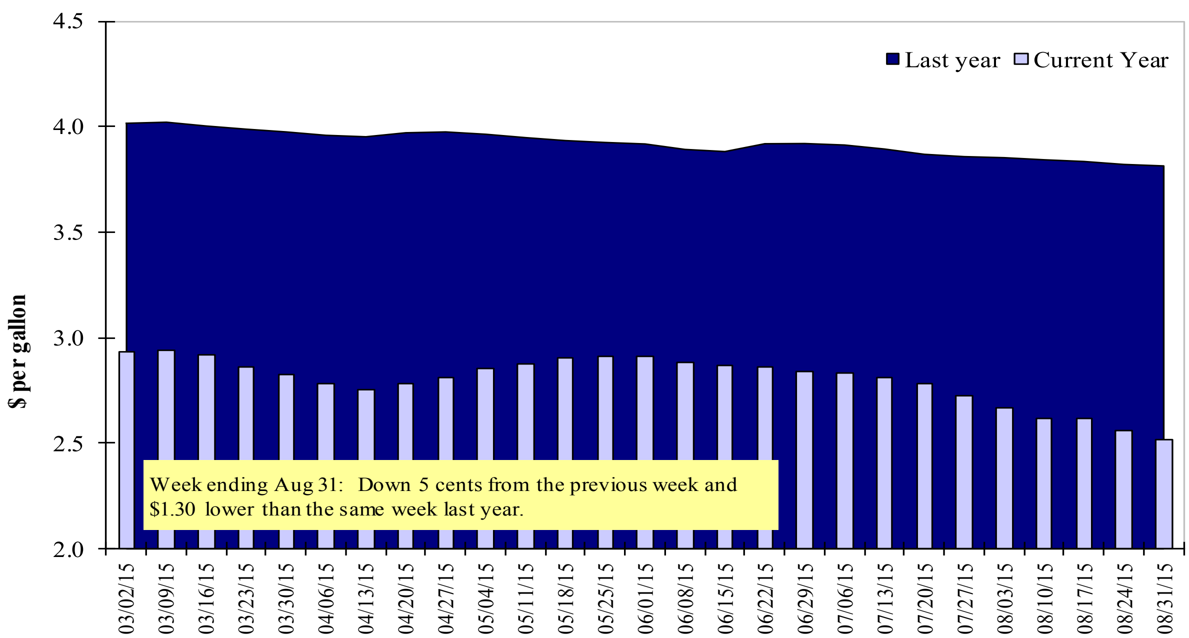
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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]									
8/20/2015	1,487	835	1,898	1,037	223	5,479	3,179	1,161	9,819
This week year ago	1,657	1,130	1,863	1,052	99	5,801	2,811	1,586	10,198
Cumulative exports-marketing year[2]									
2014/15 YTD	1,324	916	1,147	686	237	4,309	44,127	49,466	97,902
2013/14 YTD	1,830	1,091	1,679	776	90	5,466	45,845	44,378	95,689
YTD 2014/15 as % of 2013/14	72	84	68	88	263	79	96	111	102
Last 4 wks as % of same period 2013/14	84	78	104	100	227	95	148	103	111
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293

[1] Current unshipped export sales to date

[2] Shipped export sales to date; new marketing year in effect for wheat

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 08/20/2015	**Total Commitments**[2]			**% change**	**Exports**[3]
	2015/16	**2014/15**	**2013/14**	**current MY**	**3-year avg**
	Next MY	**Current MY**	**Last MY**	**from last MY**	**2011-2013**
		- 1,000 mt -			- 1,000 mt -
Japan	1,103	12,145	11,605	5	10,079
Mexico	2,919	10,946	10,724	2	8,145
Korea	1	3,922	4,744	(17)	2,965
Colombia	220	4,466	3,387	32	3,461
Taiwan	82	1,810	2,057	(12)	1,238
Top 5 Importers	**4,324**	**33,289**	**32,516**	**2**	**25,887**
Total US corn export sales	**6,640**	**47,307**	**48,656**	**(3)**	**34,445**
% of Projected	14%	100%	100%		
Change from prior week	**987**	**(132)**	**(33)**		
Top 5 importers' share of U.S. corn export sales	65%	70%	67%		75%
USDA forecast, August 2015	**47,074**	**47,074**	**48,855**	**(4)**	
Corn Use for Ethanol USDA forecast, August 2015	**133,350**	**132,080**	**130,404**	**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 Importers[1] of U.S. Soybeans

Week Ending 08/20/2015	Total Commitments[2] 2015/16 Next MY	2014/15 Current MY	2013/14 Last MY	% change current MY from last MY	Exports[3] 3-yr avg. 2011-13
		- 1,000 mt -			- 1,000 mt -
China	4,913	29,598	27,960	6	24,211
Mexico	899	3,880	3,286	18	2,971
Indonesia	74	1,912	2,453	(22)	1,895
Japan	361	2,279	1,914	19	1,750
Taiwan	187	1,388	1,335	4	1,055
Top 5 importers	**6,435**	**39,057**	**36,948**	**6**	**31,882**
Total US soybean export sales	**11,919**	**50,627**	**45,965**	**10**	**39,169**
% of Projected	25%	102%	103%		
Change from prior week	1,457	(132)	(100)		
Top 5 importers' share of U.S. soybean export sales	54%	77%	80%		**81%**
USDA forecast, August 2015	**47,003**	**49,728**	**44,632**	**11**	

(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. (Carryover plus Accumulated Exports)

Table 15

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

Week Ending 08/20/2015	Total Commitments[2] 2015/16 Current MY	2014/15 Last MY	% change current MY from last MY	Exports[3] 3-yr avg 2012-2014
	- 1,000 mt -			- 1,000 mt -
Japan	922	1,226	(25)	3,113
Mexico	932	1,325	(30)	2,807
Nigeria	864	1,156	(25)	2,512
Philippines	783	805	(3)	2,105
Brazil	260	1,178	(78)	2,091
Korea	512	662	(23)	1,273
Taiwan	399	415	(4)	1,007
Indonesia	122	286	(57)	751
Colombia	218	267	(18)	662
Thailand	142	159		618
Top 10 importers	**5,011**	**7,320**	**(32)**	**16,939**
Total US wheat export sales	**9,789**	**11,267**	**(13)**	**26,361**
% of Projected	39%	48%		
Change from prior week	529	404		
Top 10 importers' share of U.S. wheat export sales	51%	65%		64%
USDA forecast, August 2015	**25,204**	**23,270**	**8**	

(n) indicates negative number.

[1] Based on FAS 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 08/27/15	Previous Week[1]	Current Week as % of Previous	2015 YTD[1]	2014 YTD[1]	2015 YTD as % of 2014 YTD	Last 4-weeks as % of: 2014	Last 4-weeks as % of: 3-yr. avg.	Total[1] 2014
Pacific Northwest									
Wheat	342	137	249	7,106	8,286	86	109	71	12,436
Corn	203	62	327	6,491	6,589	99	46	131	7,781
Soybeans	16	0	n/a	4,087	4,502	91	102	13	12,887
Total	**560**	**199**	**281**	**17,683**	**19,377**	**91**	**74**	**80**	**33,104**
Mississippi Gulf									
Wheat	107	78	136	2,963	3,361	88	74	60	4,495
Corn	559	641	87	20,356	21,548	94	103	166	30,912
Soybeans	142	206	69	12,239	10,634	115	363	134	29,087
Total	**807**	**926**	**87**	**35,558**	**35,543**	**100**	**116**	**131**	**64,495**
Texas Gulf									
Wheat	131	49	268	2,624	4,338	60	70	56	6,120
Corn	34	0	n/a	402	397	101	268	196	580
Soybeans	0	0	n/a	210	257	82	n/a	0	949
Total	**165**	**49**	**339**	**3,236**	**4,992**	**65**	**80**	**64**	**7,649**
Interior									
Wheat	33	36	92	941	880	107	31	105	1,400
Corn	148	136	109	4,052	3,699	110	90	141	5,677
Soybeans	34	10	351	2,047	2,292	89	88	104	4,312
Total	**214**	**181**	**118**	**7,040**	**6,871**	**102**	**75**	**129**	**11,389**
Great Lakes									
Wheat	21	33	64	571	353	162	253	358	935
Corn	25	25	99	365	161	227	125	260	288
Soybeans	0	0	n/a	86	51	170	n/a	0	988
Total	**46**	**58**	**79**	**1,022**	**564**	**181**	**192**	**317**	**2,211**
Atlantic									
Wheat	1	1	95	363	333	109	6	8	553
Corn	12	0	n/a	111	540	21	25	70	816
Soybeans	3	5	52	957	996	96	907	195	2,119
Total	**16**	**6**	**258**	**1,430**	**1,869**	**76**	**31**	**51**	**3,487**
U.S. total from ports[2]									
Wheat	633	333	190	14,567	17,551	83	90	70	25,939
Corn	981	864	114	31,776	32,933	96	88	156	46,054
Soybeans	194	221	88	19,625	18,733	105	285	114	50,342
Total	**1,809**	**1,419**	**127**	**65,969**	**69,217**	**95**	**99**	**109**	**122,335**

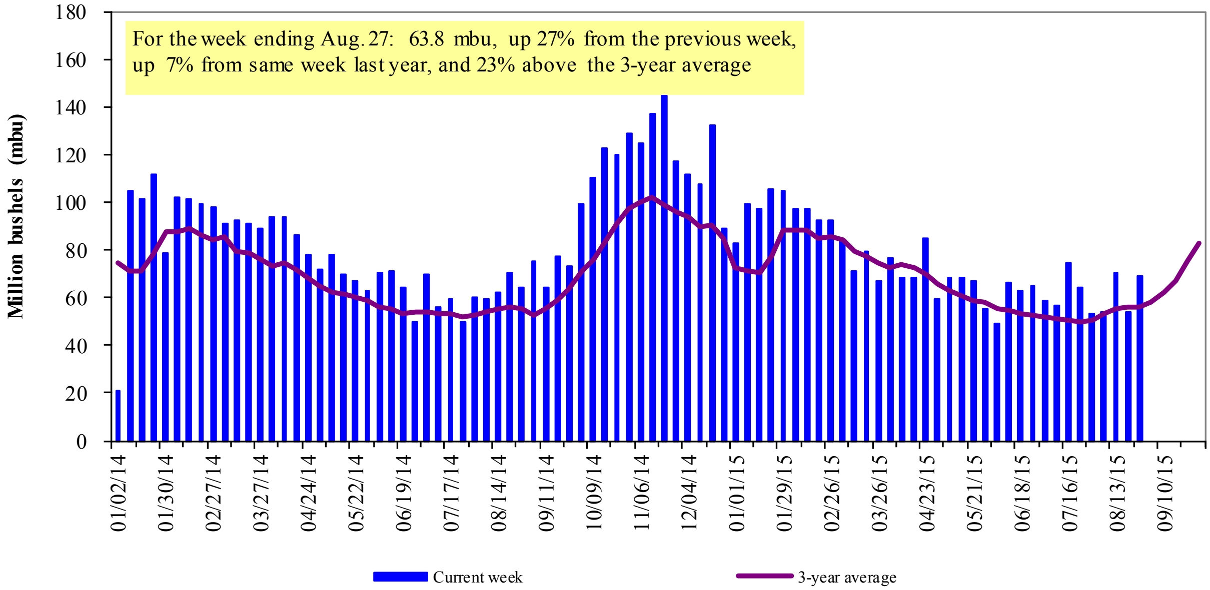
[1] Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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 2014.

Figure 14

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

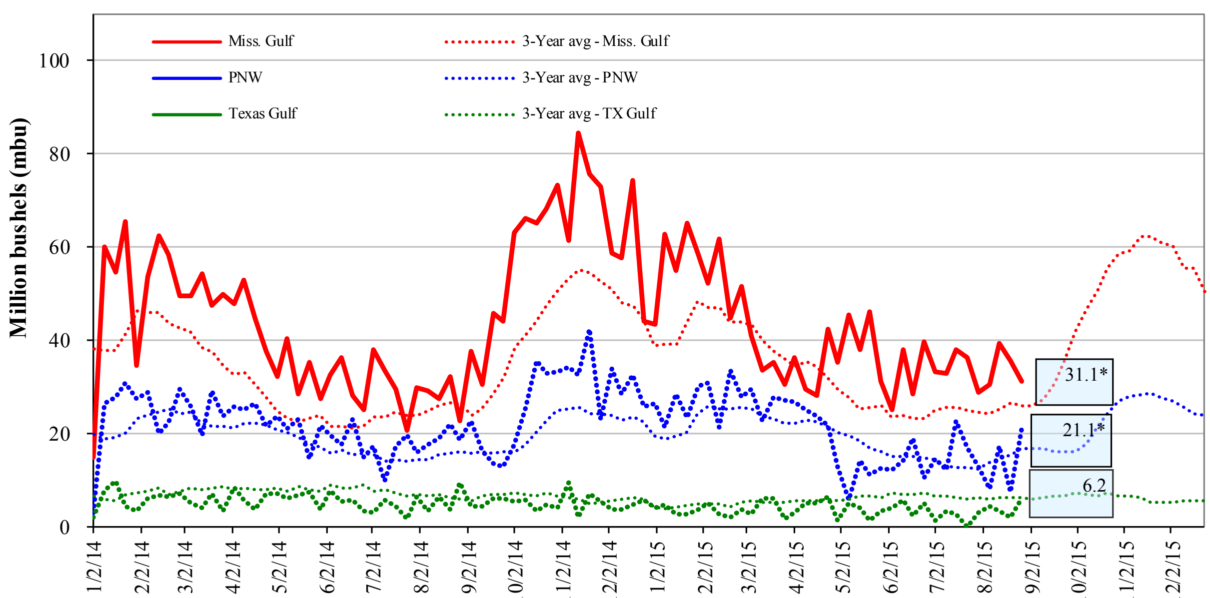


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

August 27: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 13	up 244	down 0.6	up 182
Last year (same week)	up 38	down 34	up 17	up 14
3-yr avg. (4-wk mov. avg.	up 20	up 0.5	up 17	up 19

Ocean Transportation

Table 17

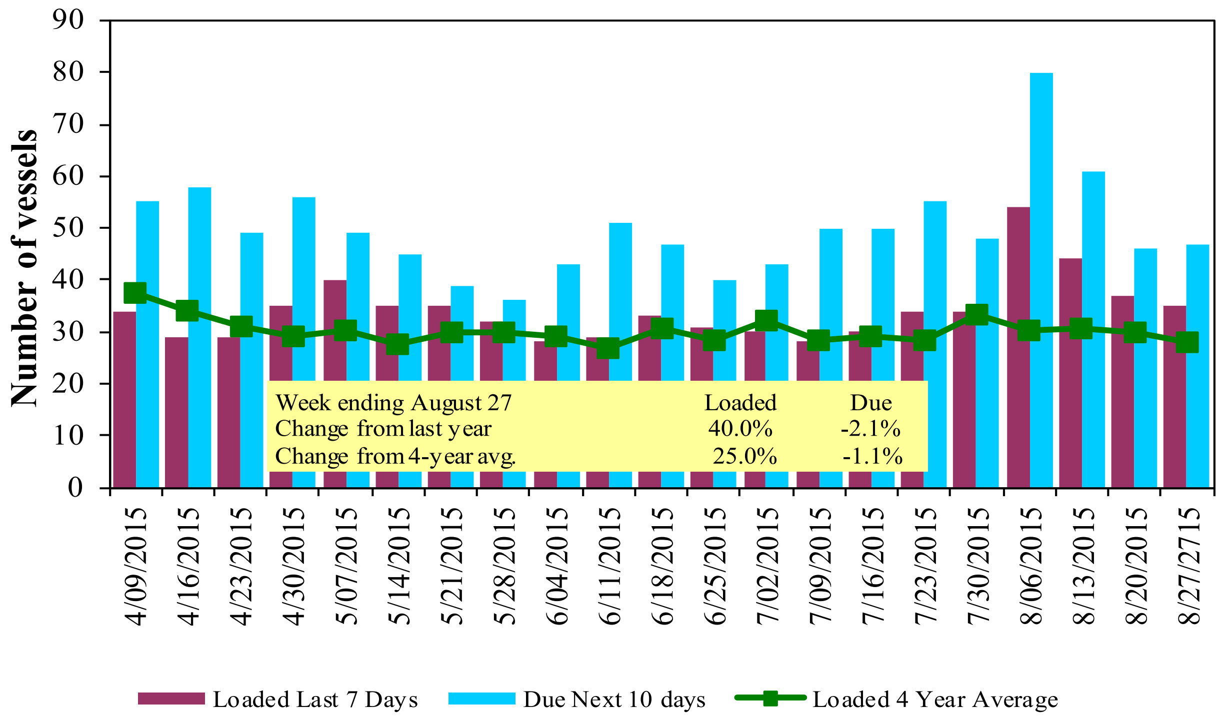
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
8/27/2015	38	35	47	8	n/a
8/20/2015	37	37	46	8	n/a
2014 range	(18..88)	(24..52)	(27..97)	(6..26)	n/a
2014 avg.	47	39	60	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

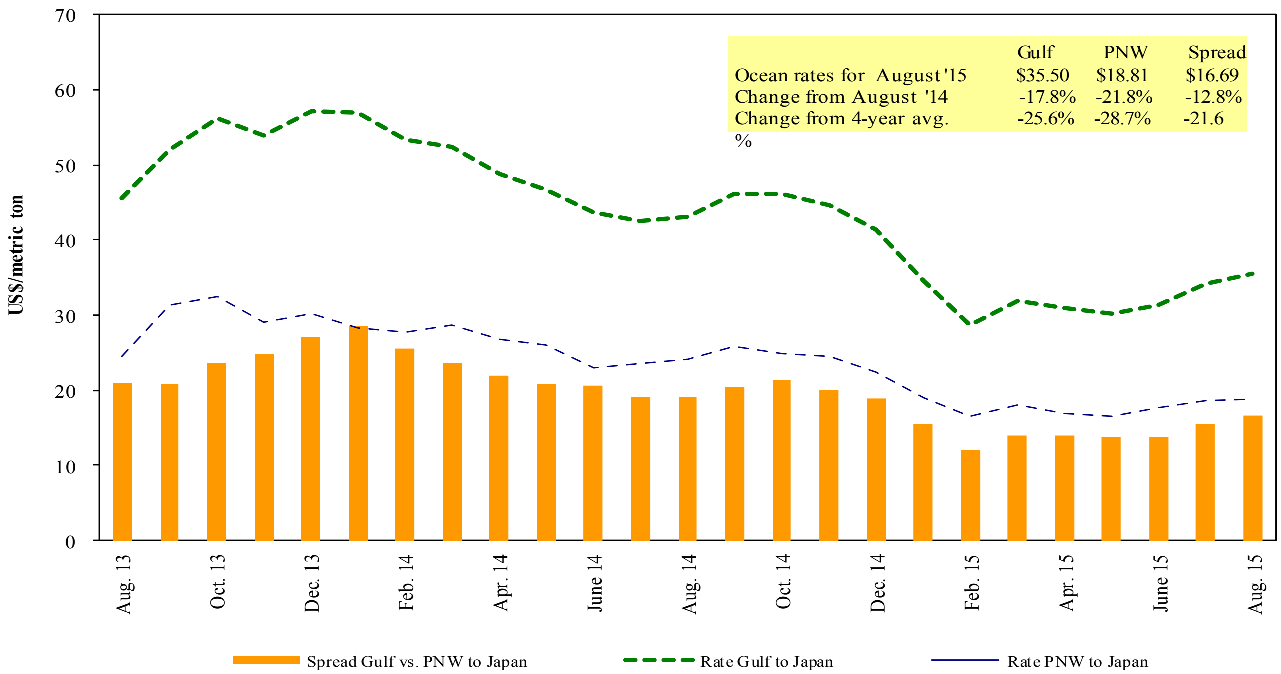
U.S. Gulf[1] Vessel Loading Activity



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



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 08/29/2015

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Sep 10/20	58,000	36.00
U.S. Gulf	China	Heavy Grain	Sep 1/10	60,000	33.00
U.S. Gulf	China	Heavy Grain	Jul 25/Aug 5	54,000	37.00
U.S. Gulf	Guatemala[1]	Corn	Jul 20/30	10,000	108.18
U.S. Gulf	Isreal	Grain	Aug 21/28	32,000	25.00
Black Sea	Saudi Arabia	Grain	Aug 15/20	60,000	26.25
Brazil	China	Heavy Grain	Sep 20/30	60,000	24.25
Brazil	China	Grain	Aug 10/30	60,000	25.25
Brazil	China	Heavy Grain	Aug 15/25	60,000	24.50
Brazil	China	Grain	Aug 1/30	60,000	23.25
Brazil	China	Heavy Grain	Jul 10/15	60,000	24.75
Brazil	China	Heavy Grain	Jul 1/10	60,000	22.75
Brazil	Egypt Med	Corn	Jul 5/15	50,000	19.50
Brazil	Thailand	Grain	Aug 1/5	60,000	28.50
Latvia	Algeria	Grain	Sep 1/5	45,000	19.25
River Plate	Jordan	Corn	Aug 15/20	35,000	41.00
River Plate	South Africa	Corn	Jul 1/10	25,000	24.25
Russia	Egypt Med	Grain	Aug 5/12	60,000	8.00
Uruguay	Algeria	Corn	Aug 3/8	20,000	38.00

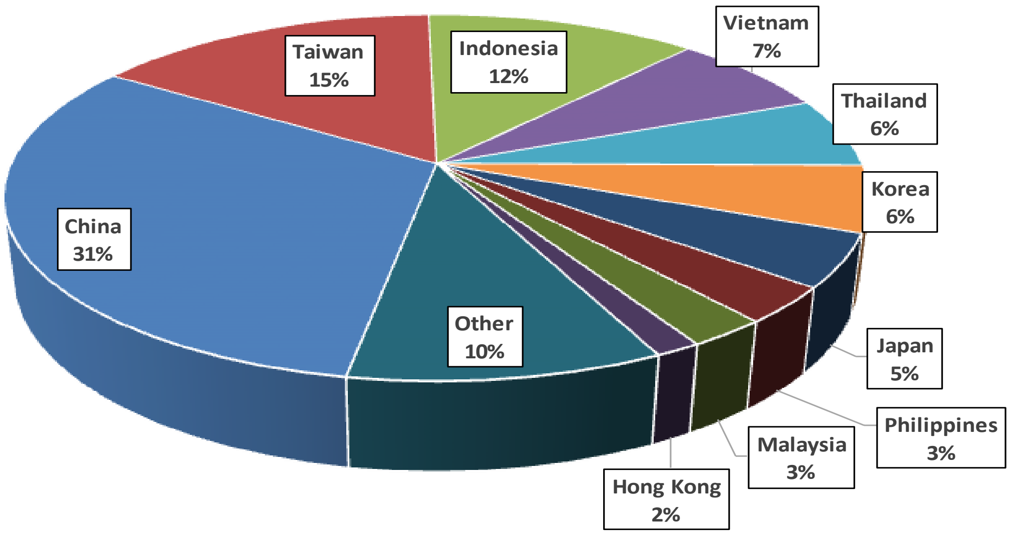
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

[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 2013, containers were used to transport 10 percent of total U.S. waterborne grain exports, up 2 percentage points from 2012. Approximately 61 percent of U.S. waterborne grain exports in 2013 went to Asia, of which 16 percent were moved in containers. Asia is the top destination for U.S. containerized grain exports—97 percent in 2013.

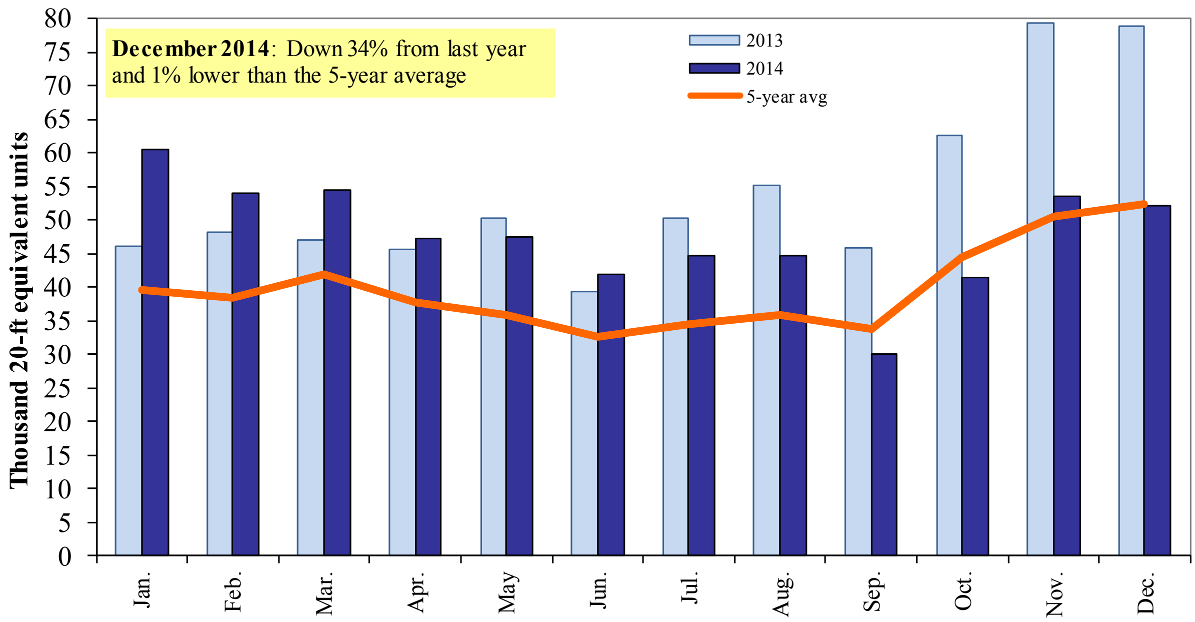
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-December 2014



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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