USDA 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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November 19, 2015

Contents

The next release is November 26, 2015

WEEKLY HIGHLIGHTS

Panama Canal Training Facility Nears Completion
The Panama Canal Authority (ACP) is building a Scale Model Maneuvering Training Facility to provide pilots and tugboat captains with additional hands-on experience to ensure that they are prepared for the 2016 opening of the expanded canal. The facility spans 35.3 acres and includes two lakes connected by a 518-meter channel. It features docking bays, model tug boats, and replicas of both the new and current locks, gates, and chambers, to provide authentic training. The facility is scheduled for completion by the end of the year and the canal expansion project is currently 94 percent complete.

Grain Inspections Increase
For the week ending November 12, **total inspections of grain** (corn, wheat, soybeans) for export from all major export regions reached 2.93 million metric tons (mmt), up 7 percent from the past week, 21 percent below last year, and 3 percent below the 3-year average. Corn and soybean inspections, up 27 and 6 percent respectively from the past week, helped the increase in total grain inspected. Inspections of wheat, however, receded for the same period, falling 3 percent. Grain inspections increased 19 percent in the Pacific Northwest (PNW) and 17 percent in the Mississippi Gulf. During the last 4 weeks, grain inspections were 7 percent below last year but 2 percent above the 3-year average. Current outstanding (unshipped) export sales were down from the previous week for corn and down for wheat and soybeans.

Warmer than Normal Weather Extends Upper Mississippi River Season
Mississippi River Lock and Dam 9 (L&D 9), near Lynxville, WI, is scheduled to be the first lock to be closed for repairs and maintenance. The closure will stop export grain from the Minneapolis-St. Paul, MN for the winter season. L&D 9 is located about 200 river miles south of Minneapolis–St. Paul, MN, in a portion of the Upper Mississippi River that closes during winter due to ice accumulations that typically begin in December. However, with warmer than expected weather, the U.S. Army Corps of Engineers, in collaboration with barge industry officials, has agreed to extend the closure date from December 7 to December 9. This could benefit Minnesota farmers with extra days to barge export bound grain before winter and repairs begin to close the northern most sections of Upper Mississippi River. Minnesota is expected to produce a record 1.45 billion bushels of corn this year and navigation conditions have been adequate for late-season movements on the Upper Mississippi River. L&D 9 is scheduled to re-open on March 17, 2016.

Snapshots by Sector

Export Sales
During the week ending November 5, **unshipped balances** of wheat, corn, and soybeans totaled 28.2 mmt, down 32 percent from the same time last year. Net weekly **wheat export sales** of .227 mmt were up 167 percent from the previous week. Net **corn export sales** were .619 mmt, up 11 percent from the previous week, and net **soybean export sales** of 1.21 mmt were up 84 percent from the past week.

Rail
U.S. Class I railroads originated 23,428 **carloads of grain** for the week ending November 7, down 4 percent from last week, up 5 percent from last year, and up 8 percent from the 3-year average.

Average November shuttle **secondary railcar bids/offers** per car were $284 below tariff for the week ending November 12, down $12 from last week, and $384 lower than last year. Non-shuttle secondary railcar bids/offers were $131 below tariff, down $19 from last week, and $681 lower than last year.

Barge
For the week ending November 14, **barge grain movements** totaled 769,714 tons, down 2 percent from last week, and down 27 percent from the same period last year.

For the week ending November 14, 489 grain barges **moved down river**, same as last week; 1,069 grain barges were **unloaded in New Orleans**, up 38 percent from the previous week.

Ocean
For the week ending November 12, 44 **ocean-going grain vessels** were loaded in the Gulf, 8 percent less than the same period last year. Sixty-seven vessels are expected to be loaded within the next 10 days, 8 percent less than the same period last year.

For the week ending November 12, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $30.50 per metric ton (mt), down 1 percent from the previous week. The cost of shipping from the PNW to Japan was $16.50 per mt, down 3 percent from the previous week.

Fuel
During the week ending November 16, U.S. average **diesel fuel prices** decreased 2 cents from the previous week to $2.48 per gallon—down $1.18 from the same week last year.

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Feature Article/Calendar

Third Quarter Wheat Transportation Cost Increase but Landed Costs Fall

Third quarter 2015 transportation costs for shipping wheat to Japan through the Pacific Northwest (PNW) and U.S. Gulf increased from the previous quarter. Increased quarter-to-quarter rail and ocean rates offset the modest drop in third quarter trucking rates, causing transportation costs to increase through each region (*Tables 1 and 2*). Transportation costs for shipping wheat from Kansas (KS) and North Dakota (ND) to Japan through the PNW each increased 3 percent from the second quarter 2015 (*table 1*). Compared to last year, the cost to ship from Kansas and North Dakota through the PNW to Japan decreased 11 and 9 percent, respectively, because of lower trucking and ocean rates. In addition, quarter-to-quarter transportation costs for shipping wheat from Kansas and North Dakota to Japan through the U.S. Gulf increased 6 and 5 percent, respectively, as ocean and rail rates increased (*Table 2*). Compared to last year however**,** the costs to ship wheat through the U.S. Gulf from Kansas and North Dakota decreased 11 and 10 percent, also due to lower trucking and ocean rates. Third quarter wheat transportation costs represented 32 to 38 percent of the landed costs, (farm value plus transportation costs), higher than the second quarter 2015, and the third quarter last year.

Table 1: Quarterly rate comparisons for shipping KS & ND wheat to Japan through the PNW

	KS					ND				
Mode	2014 3rd qtr	2015 2nd qtr	2015 3rd qtr	Year-to-Year change	Quarterly change	2014 3rd qtr	2015 2nd qtr	2015 3rd qtr	Year-to-Year change	Quarterly change
	$/metric ton			%	%	$/metric ton			%	%
Truck[1]	11.70	9.18	8.50	-27.35	-7.41	11.70	9.18	8.50	-27.35	-7.41
Rail[2]	58.06	55.39	56.83	-2.12	2.60	56.53	55.58	57.13	1.06	2.79
Ocean vessel	24.45	17.04	18.57	-24.05	8.98	24.45	17.04	18.57	-24.05	8.98
Transportation Costs	94.21	81.61	83.90	-10.94	2.81	92.68	81.80	84.20	-9.15	2.93
Farm Value[3]	221.07	193.15	173.06	-21.72	-10.40	219.24	193.27	179.55	-18.10	-7.10
Total Landed Cost	315.28	274.76	256.96	-18.50	-6.48	311.92	275.07	263.75	-15.44	-4.12
Transport % of landed cost	29.88	29.70	32.65			29.71	29.74	31.92		

Table 2: Quarterly rate comparisons for shipping KS & ND wheat to Japan through the Gulf

	KS					ND				
Mode	2014 3rd qtr	2015 2nd qtr	2015 3rd qtr	Year-to-Year change	Quarterly change	2014 3rd qtr	2015 2nd qtr	2015 3rd qtr	Year-to-Year change	Quarterly change
	$/metric ton			%	%	$/metric ton			%	%
Truck[1]	11.70	9.18	8.50	-27.35	-7.41	11.70	9.18	8.50	-27.35	-7.41
Rail[2]	36.92	38.09	39.55	7.12	3.83	66.08	64.80	66.33	0.38	2.36
Ocean vessel	43.99	30.86	34.71	-21.10	12.48	43.99	30.86	34.71	-21.10	12.48
Transportation Costs	92.61	78.13	82.76	-10.64	5.93	121.77	104.84	109.54	-10.04	4.48
Farm Value[3]	221.07	193.15	173.06	-21.72	-10.40	219.24	193.27	179.55	-18.10	-7.10
Total Landed Cost	313.68	271.28	255.82	-18.45	-5.70	341.01	298.11	289.09	-15.23	-3.03
Transport % of landed cost	29.52	28.80	32.35			35.71	35.17	37.89		

Source: USDA/AMS/TMP

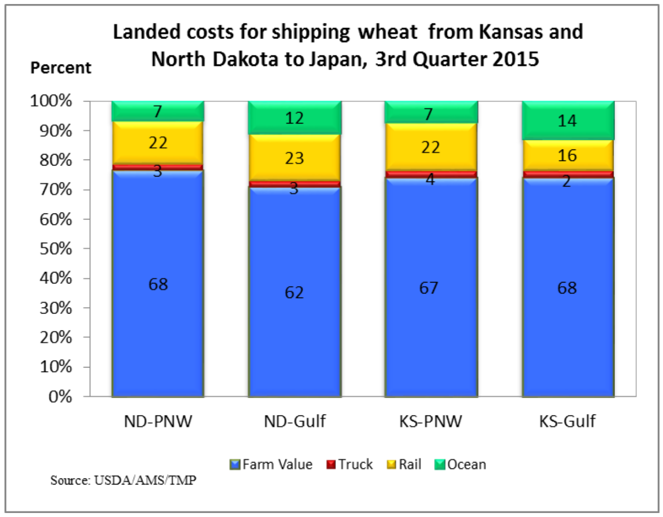
[1] Trucking rates for second quaretr 2015 have been revised

[2] Rail tariff rates include fuel surcharges and revisions for heavy axle railcars 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

[3] Source: USDA/NASS, wheat prices for North Dakota (mainly HRS) and Kansas (mainly HRW)

The total landed cost for shipping wheat to Japan ranged from $256 to $289 per metric ton (mt), below both the previous quarter and last year for each route (*Tables 1 and 2*). Quarter-to-quarter total landed costs decreased as trucking rates and farm values continued to fall. Specifically, landed costs decreased 7 percent from the previous quarter for shipping wheat through the PNW from Kansas and 4 percent from North Dakota. Year-to-year landed costs for shipping wheat from Kansas and North Dakota through the PNW decreased 19 and 15 percent, respectively, due primarily to a large drop in trucking and ocean rates. Quarter to-quarter landed costs to ship through the U.S. Gulf decreased 6 percent for Kansas and 3 percent for North Dakota, pushed down by lower truck rates and farm values. Year-to-year landed costs for shipping wheat through the U.S. Gulf also decreased 19 percent for Kansas and 15 percent for North Dakota (*see Table 2*).

Third quarter farm values for wheat produced in Kansas accounted for 67 percent of the landed cost for shipping through the PNW and 68 percent through the Gulf, below the second quarter 2015 and last year (*see figure*). Third quarter North Dakota wheat farm values accounted for 68 percent of landed cost through the PNW, and 62 percent of the total landed cost through the Gulf, also below the second quarter 201,5 and the third quarter last year.



Ocean rates for wheat shipped from the PNW to Japan increased 9 percent from the second quarter, but were 24 percent below this time last year, as vessel deliveries continued to increase (*see Grain Transportation Report (GTR) dated 10/29/15)*. Ocean rates for shipping wheat from the Gulf to Japan increased 13 percent from the second quarter, but decreased 21 percent from last year.

Quarter-to-quarter rail rates for shipping wheat from Kansas and North Dakota through the PNW increased 3 percent. Rail rates for wheat shipped through the Gulf were up 4 percent for Kansas and 2 percent for North Dakota, compared to last year. Kansas rail rates for shipping wheat to the PNW decreased 2 percent from year-to-year, but North Dakota rates increased 1 percent for the same period. Rail rates from Kansas to the Gulf increased 7 percent year-to-year, while North Dakota rates decreased slightly (*see Table 2*). Rail's share of the total landed costs increased for each route as farm values slid. The cost of moving wheat from each state by truck to a rail-served grain elevator dropped 7 percent quarter-to-quarter due in part to lower diesel prices. Year-to-year trucking rates were down 27 percent as trucking activity in the North Central region declined.

According to the Grain Inspection Packers and Stockyards Administration, the total amount of wheat inspected for export to Japan during the third quarter was 0.63 million metric tons (mmt), down 12 percent from last year at this time, representing 11 percent of total U.S. wheat exports. For the same period, total U.S. wheat exports reached 6.6 mmt, down 11 percent from last year. For the 2015/16 marketing year, year-to-date cumulative (shipped) export sales of all wheat are down 18 percent from the past year (*see* ***Table 12 inside this report****)*. Johnny.Hill@ams.usda.gov

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit Train	Shuttle		Gulf	Pacific
11/18/15	167	266	207	189	136	117
11/11/15	168	267	207	174	138	121

[1]Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = near-month secondary rail market bid and monthly tariff rat with fuel surcharge ($/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	11/13/2015	11/6/2015
Corn	IL--Gulf	-0.41	-0.64
Corn	NE--Gulf	-0.81	-0.86
Soybean	IA--Gulf	-1.25	-1.29
HRW	KS--Gulf	-1.45	-1.40
HRS	ND--Portland	-1.87	-1.89

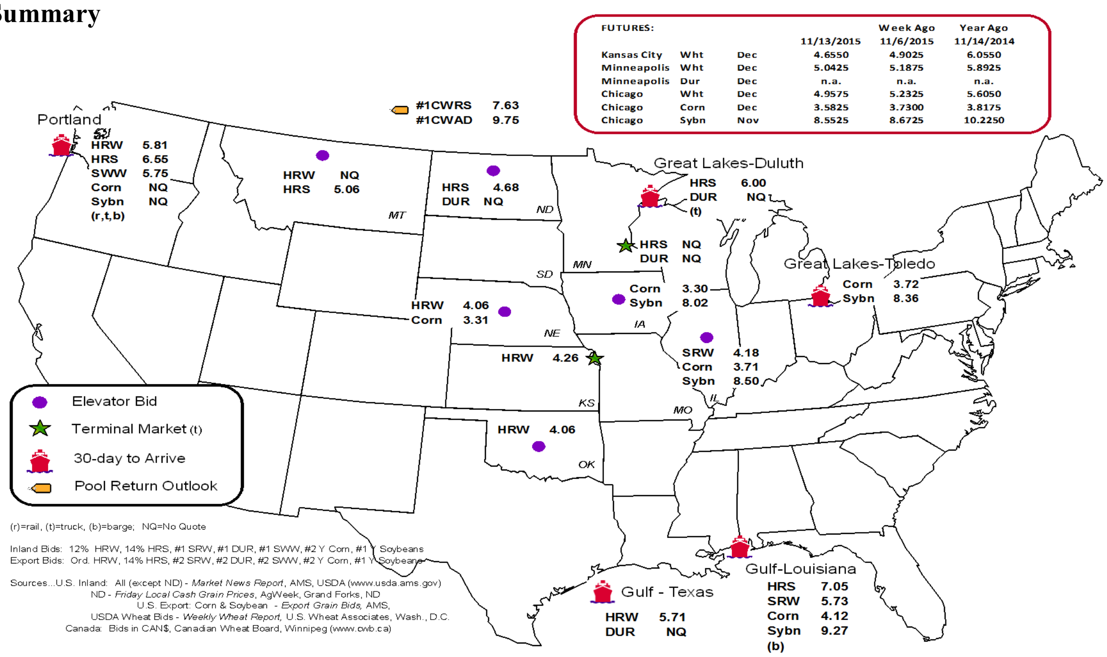
Note: nq = no quote

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]

For the Week Ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-Border Mexico[3]
11/11/2015[p]	1,230	1,357	6,826	1,078	10,491	11/7/2015	1,476
11/04/2015[r]	1,653	1,352	6,650	1,073	10,728	10/31/2015	4,147
2015 YTD[r]	27,012	50,720	200,634	21,702	300,068	2015 YTD	85,092
2014 YTD[r]	33,351	72,495	213,409	25,011	344,266	2014 YTD	85,959
2015 YTD as % of 2014 YTD	81	70	94	87	87	% change YTD	99
Last 4 weeks as % of 2014[2]	102	81	103	99	100	Last 4wks % 2014	150
Last 4 weeks as % of 4-year avg.[2]	149	125	141	102	130	Last 4wks % 4 yr	137
Total 2014	44,617	83,674	256,670	32,107	417,068	Total 2014	96,467
Total 2013	31,550	71,388	168,826	25,176	296,940	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.

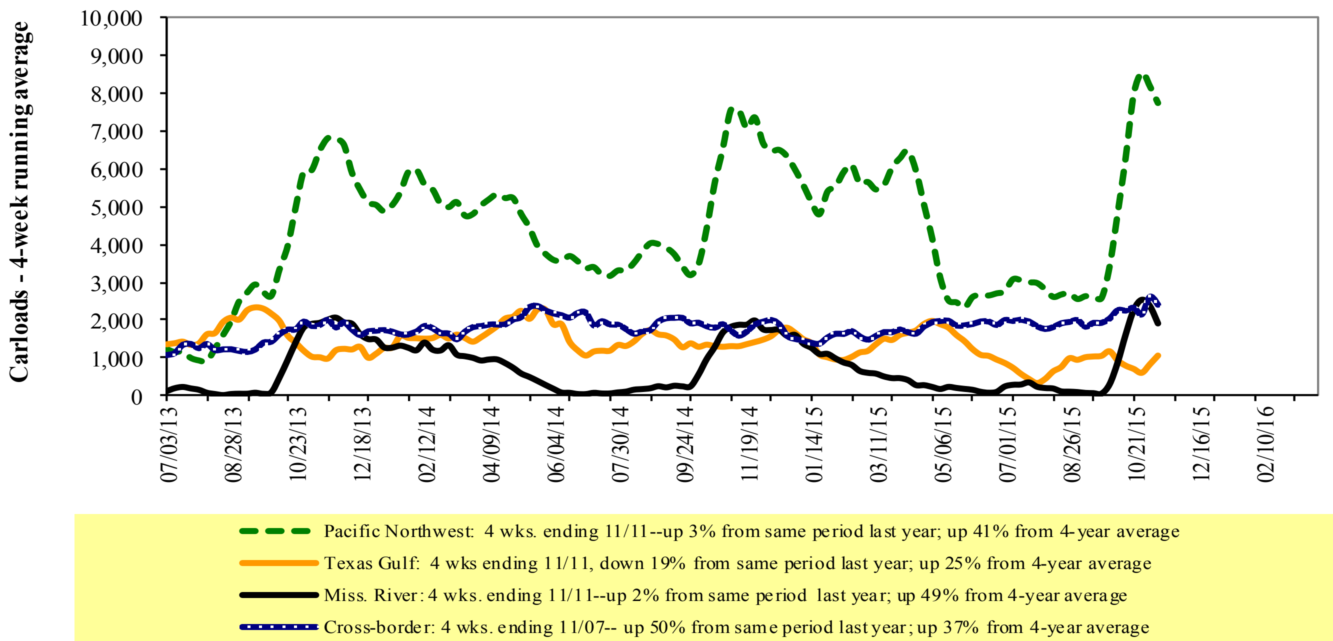
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)

For the week ending:	East		West			U.S. total	Canada	
11/7/2015	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,125	2,672	12,510	737	5,384	23,428	5,289	6,259
This week last year	2,563	3,375	9,943	886	5,503	22,270	5,653	4,648
2015 YTD	89,393	127,615	449,660	39,553	228,593	934,814	179,769	199,213
2014 YTD	82,199	124,055	390,593	39,220	246,382	882,449	199,260	231,494
2015 YTD as % of 2014 YTD	109	103	115	101	93	106	90	86
Last 4 weeks as % of 2014*	97	100	123	75	102	109	89	101
Last 4 weeks as % of 3-yr avg.*	103	90	123	90	119	113	96	89
Total 2014	103,331	153,771	482,431	47,510	297,969	1,085,012	242,616	276,322

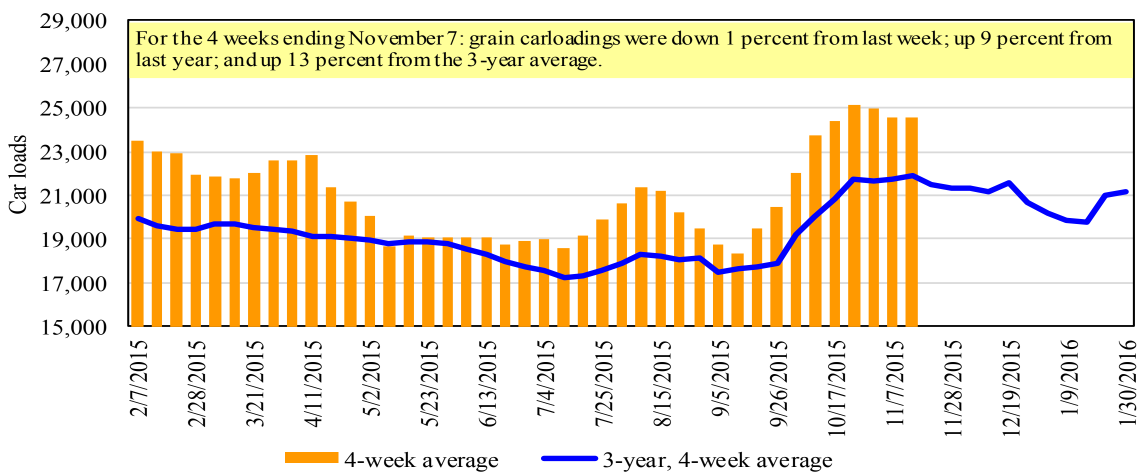
[1]The past 4 weeks of this year as a percent of the same 4 weeks last year.

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

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]

For the week ending: 11/12/2015		Nov-15	Nov-14	Dec-15	Dec-14	Jan-16	Jan-15	Feb-16	Feb-15
		Delivery period							
BNSF[3]	COT grain units	no bids	no offer	no bids	no offer	no bids	no offer	no bids	no offer
	COT grain single-car[5]	0 . . 25	no offer	0 . . 25	no offer	no bids	no offer	no bids	no offer
UP[4]	GCAS/Region 1	no bids	no offer	no bids	no offer	no bids	no offer	n/a	n/a
	GCAS/Region 2	no bids	no offer	no bids	no offer	no bids	no offer	n/a	n/a

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

[2]Average 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.

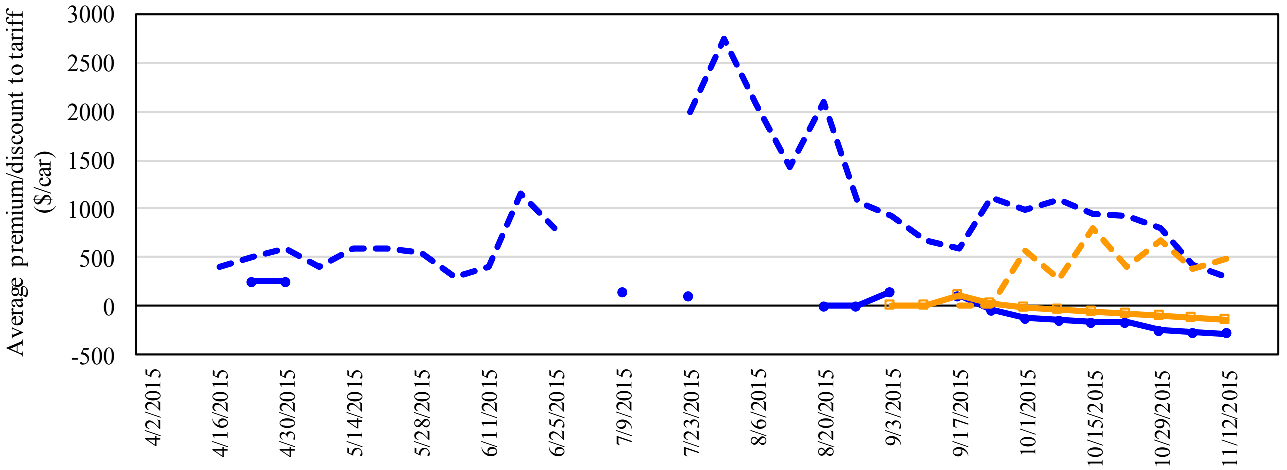
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

[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 November 2015, Secondary Market

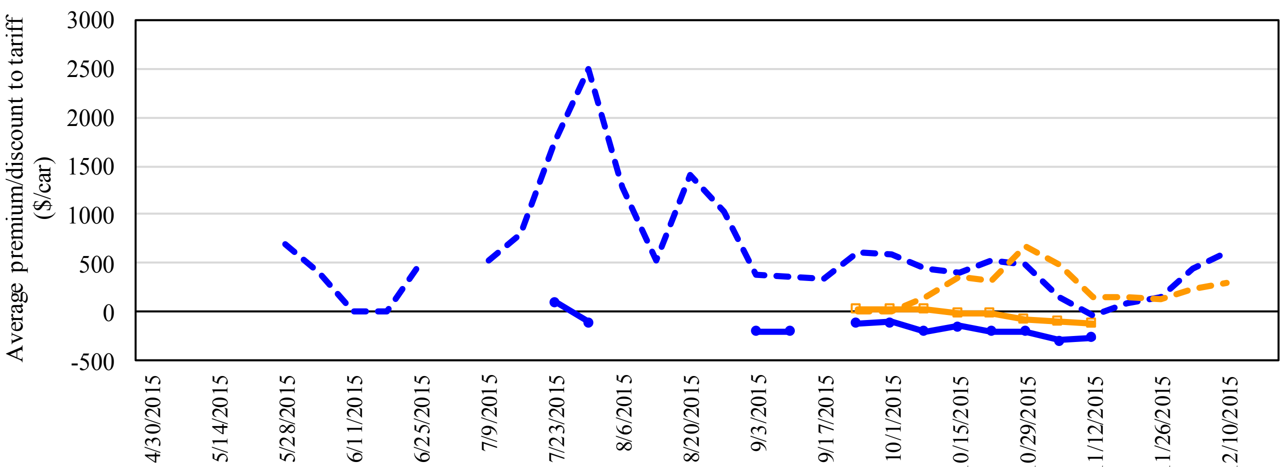


11/12/2015	BNSF	UP
Non-Shuttle	-$163	-$100
Shuttle	-$369	-$200

Average Non-shuttle bids/offers fell $19 this week, and are $231 below the peak.
Average Shuttle bids/offers fell $12 this week and are $534 below the peak.

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 December 2015, Secondary Market



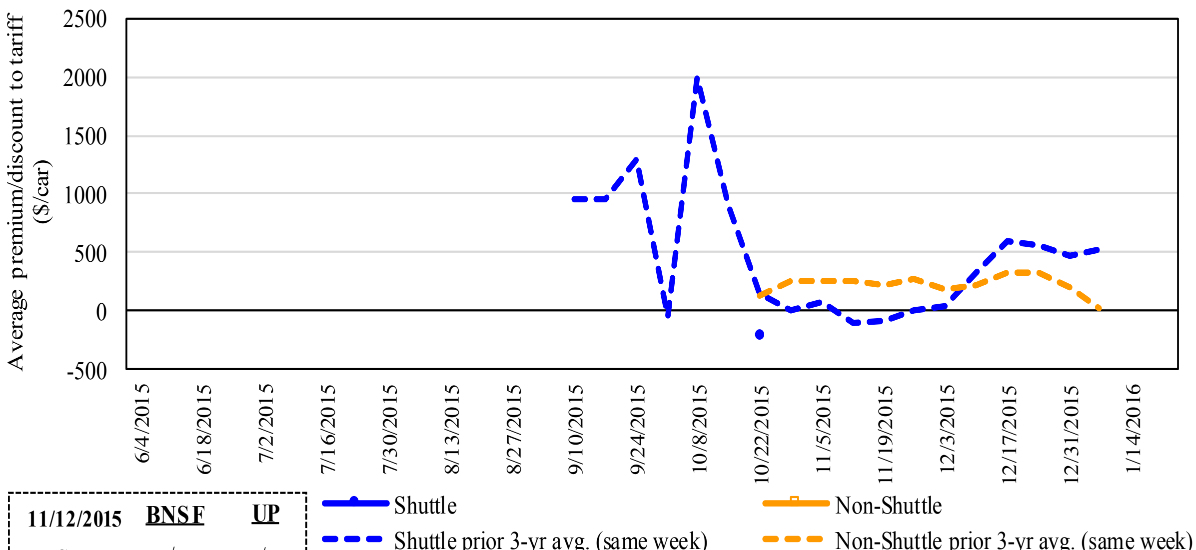
11/12/2015	BNSF	UP
Non-Shuttle	-$100	-$138
Shuttle	-$325	-$200

Average Non-shuttle bids/offers fell $25 this week, and are $144 below the peak.
Average Shuttle bids/offers rose $29 this week and are $363 below the peak.

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 January 2016, Secondary Market



11/12/2015	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	n/a

There were no Non-Shuttle bids/offers this week.
There were no Shuttle bids/offers this week.

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: 11/12/2015	Delivery period					
		Nov-15	Dec-15	Jan-16	Feb-16	Mar-16	Apr-16
Non-shuttle	**BNSF-GF**	**(163)**	**(100)**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(38)	0	n/a	n/a	n/a	n/a
	Change from same week 2014	(963)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**(100)**	**(138)**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	0	(50)	n/a	n/a	n/a	n/a
	Change from same week 2014	(400)	n/a	n/a	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**(369)**	**(325)**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(25)	8	n/a	n/a	n/a	n/a
	Change from same week 2014	(469)	(125)	n/a	n/a	n/a	n/a
	UP-Pool	**(200)**	**(200)**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	0	50	n/a	n/a	n/a	n/a
	Change from same week 2014	n/a	(300)	n/a	n/a	n/a	n/a

[1]Average 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 Shipments[1]

Effective date: 11/1/2015	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	$455	$40.32	$1.10	14
	Grand Forks, ND	Duluth-Superior, MN	$3,563	$3	$35.41	$0.96	-3
	Wichita, KS	Los Angeles, CA	$6,950	$15	$69.17	$1.88	3
	Wichita, KS	New Orleans, LA	$4,243	$801	$50.09	$1.36	17
	Sioux Falls, SD	Galveston-Houston, TX	$6,486	$13	$64.53	$1.76	4
	Northwest KS	Galveston-Houston, TX	$4,511	$878	$53.51	$1.46	17
	Amarillo, TX	Los Angeles, CA	$4,710	$1,221	$58.90	$1.60	20
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,328	$905	$42.04	$1.07	15
	Toledo, OH	Raleigh, NC	$6,061	$0	$60.19	$1.53	15
	Des Moines, IA	Davenport, IA	$2,168	$192	$23.43	$0.60	5
	Indianapolis, IN	Atlanta, GA	$5,004	$0	$49.69	$1.26	11
	Indianapolis, IN	Knoxville, TN	$4,311	$0	$42.81	$1.09	14
	Des Moines, IA	Little Rock, AR	$3,444	$563	$39.80	$1.01	14
	Des Moines, IA	Los Angeles, CA	$5,052	$1,641	$66.46	$1.69	12
Soybeans	Minneapolis, MN	New Orleans, LA	$3,559	$52	$35.86	$0.98	-11
	Toledo, OH	Huntsville, AL	$5,051	$0	$50.16	$1.37	24
	Indianapolis, IN	Raleigh, NC	$6,178	$0	$61.35	$1.67	16
	Indianapolis, IN	Huntsville, AL	$4,529	$0	$44.98	$1.22	23
	Champaign-Urbana, IL	New Orleans, LA	$3,974	$905	$48.45	$1.32	13
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,953	$9	$39.34	$1.07	0
	Wichita, KS	Galveston-Houston, TX	$3,919	$7	$38.99	$1.06	6
	Chicago, IL	Albany, NY	$5,492	$0	$54.54	$1.48	22
	Grand Forks, ND	Portland, OR	$5,611	$15	$55.87	$1.52	-1
	Grand Forks, ND	Galveston-Houston, TX	$6,532	$16	$65.02	$1.77	-1
	Northwest KS	Portland, OR	$5,478	$1,439	$68.69	$1.87	19
Corn	Minneapolis, MN	Portland, OR	$5,000	$19	$49.84	$1.27	-11
	Sioux Falls, SD	Tacoma, WA	$4,960	$17	$49.42	$1.26	-10
	Champaign-Urbana, IL	New Orleans, LA	$3,147	$905	$40.24	$1.02	16
	Lincoln, NE	Galveston-Houston, TX	$3,600	$10	$35.85	$0.91	-6
	Des Moines, IA	Amarillo, TX	$3,795	$708	$44.72	$1.14	14
	Minneapolis, MN	Tacoma, WA	$5,000	$18	$49.83	$1.27	-10
	Council Bluffs, IA	Stockton, CA	$4,640	$19	$46.27	$1.18	-7
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,490	$17	$54.69	$1.49	-9
	Minneapolis, MN	Portland, OR	$5,510	$19	$54.90	$1.49	-10
	Fargo, ND	Tacoma, WA	$5,380	$15	$53.58	$1.46	-9
	Council Bluffs, IA	New Orleans, LA	$4,425	$1,044	$54.31	$1.48	13
	Toledo, OH	Huntsville, AL	$4,226	$0	$41.97	$1.14	30
	Grand Island, NE	Portland, OR	$5,360	$1,473	$67.86	$1.85	15

[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

Effective date: 11/1/2015				Fuel			Percent
	Origin		Tariff	surcharge	Tariff plus surcharge per:		change
Commodity	state	Destination region	rate/car[1]	per car[2]	metric ton[3]	bushel[3]	Y/Y[4]
Wheat	MT	Chihuahua, CI	$7,459	$16	$76.38	$2.08	3
	OK	Cuautitlan, EM	$6,514	$20	$66.75	$1.81	-8
	KS	Guadalajara, JA	$6,995	$19	$71.66	$1.95	-9
	TX	Salinas Victoria, NL	$4,142	$7	$42.39	$1.15	1
Corn	IA	Guadalajara, JA	$8,427	$22	$86.33	$2.19	-4
	SD	Celaya, GJ	$7,840	$21	$80.32	$2.04	-6
	NE	Queretaro, QA	$7,879	$20	$80.71	$2.05	-4
	SD	Salinas Victoria, NL	$6,545	$16	$67.04	$1.70	2
	MO	Tlalnepantla, EM	$7,238	$19	$74.15	$1.88	-3
	SD	Torreon, CU	$7,240	$18	$74.16	$1.88	-1
Soybeans	MO	Bojay (Tula), HG	$8,578	$19	$87.83	$2.39	-2
	NE	Guadalajara, JA	$9,142	$21	$93.62	$2.55	-1
	IA	El Castillo, JA	$9,470	$21	$96.97	$2.64	-1
	KS	Torreon, CU	$7,439	$13	$76.14	$2.07	0
Sorghum	NE	Celaya, GJ	$7,404	$19	$75.84	$1.92	-6
	KS	Queretaro, QA	$7,563	$12	$77.39	$1.96	5
	NE	Salinas Victoria, NL	$6,168	$14	$63.16	$1.60	4
	NE	Torreon, CU	$6,827	$16	$69.92	$1.77	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

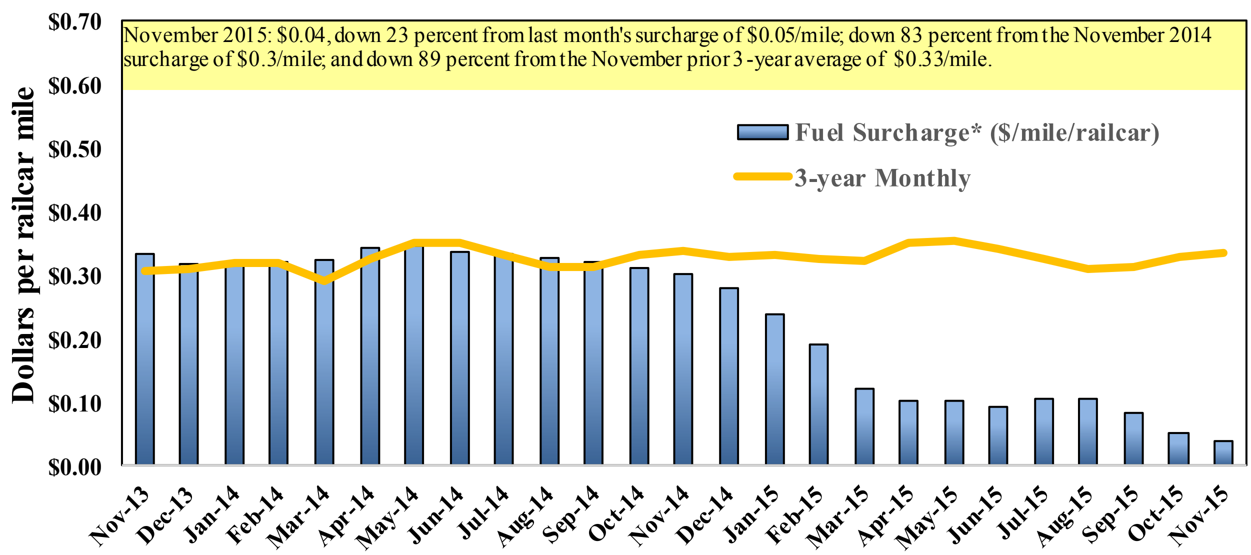
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[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.

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

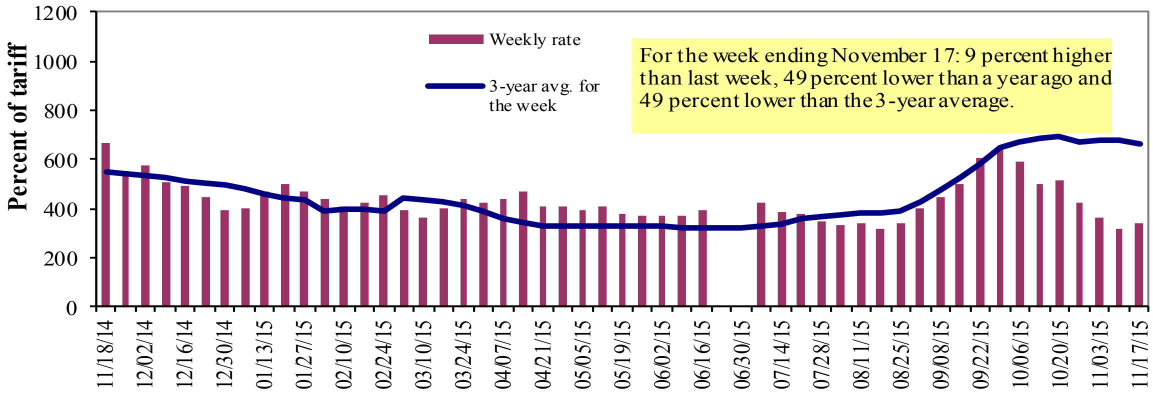
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.

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]



[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]	11/17/2015	425	343	340	233	270	270	200
	11/10/2015	388	328	313	230	300	300	205
$/ton	11/17/2015	26.31	18.25	15.78	9.30	12.66	10.91	6.28
	11/10/2015	24.02	17.45	14.52	9.18	14.07	12.12	6.44
Current week % change from the same week:								
	Last year	-	-52	-49	-57	-61	-61	-58
	3-year avg. [2]	-30	-47	-49	-62	-60	-60	-62
Rate[1]	December	-	-	358	233	268	268	205
	February	-	-	338	240	258	258	210

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

Source: Transportation & Marketing Programs/AMS/USDA

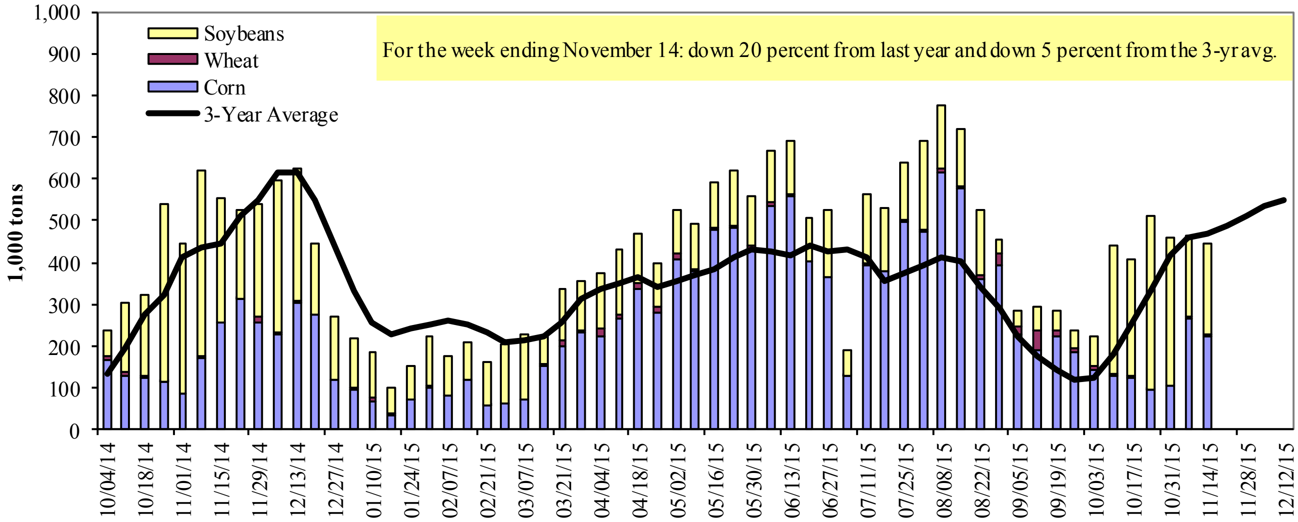
Figure 9
Benchmark tariff rates

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)

For the week ending 11/14/2015	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	169	0	126	5	299
Winfield, MO (L25)	185	3	178	0	366
Alton, IL (L26)	262	3	227	0	492
Granite City, IL (L27)	224	3	219	0	446
Illinois River (L8)	70	0	30	0	100
Ohio River (L52)	70	0	177	7	254
Arkansas River (L1)	0	1	67	1	69
Weekly total - 2015	295	5	462	8	770
Weekly total - 2014	328	3	727	2	1,061
2015 YTD[1]	17,546	1,697	10,184	296	29,722
2014 YTD	18,396	2,090	8,554	213	29,253
2015 as % of 2014 YTD	95	81	119	139	102
Last 4 weeks as % of 2014[2]	114	120	77	287	87
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.

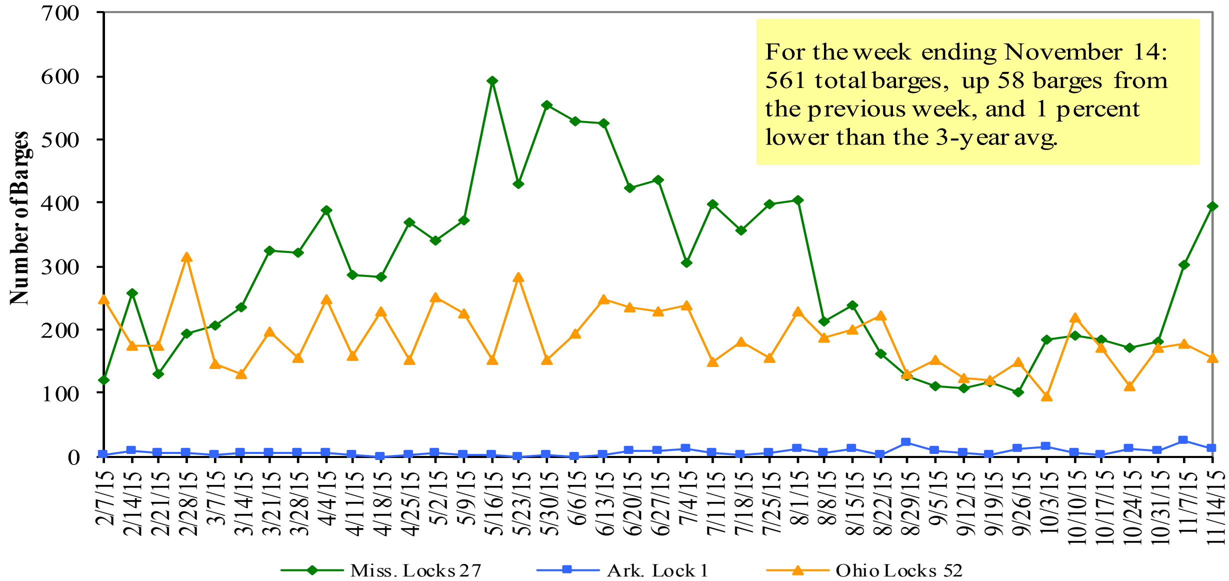
[2] As a percent of same period in 2014.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers

Figure 11

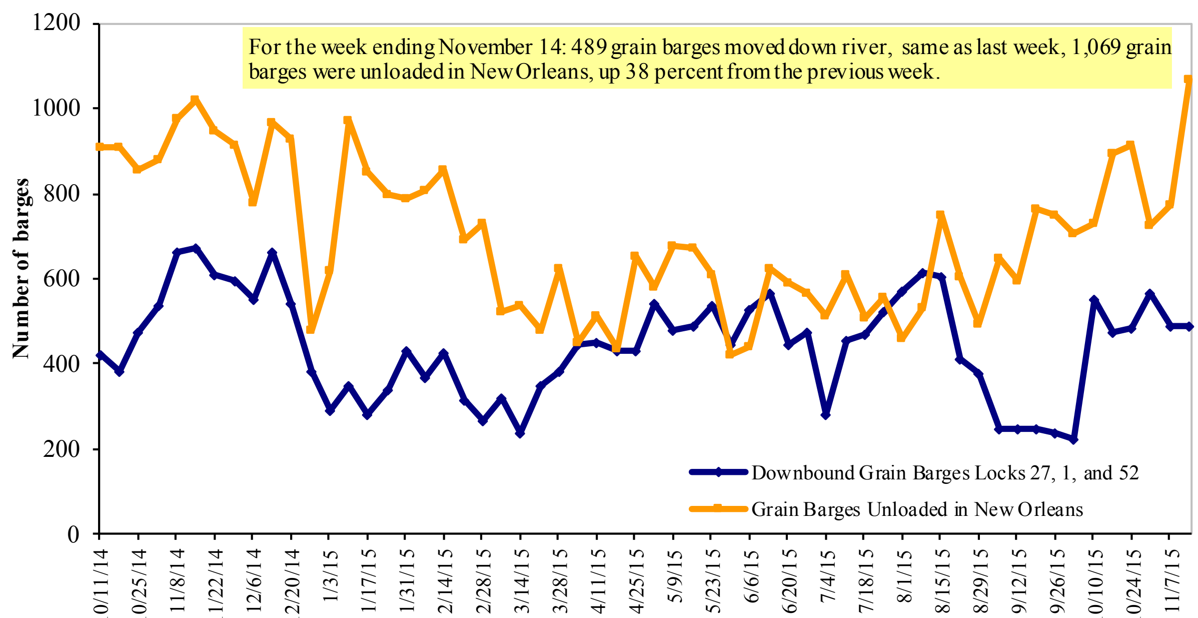
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 11/16/2015 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.499	-0.014	-1.043
	New England	2.544	-0.005	-1.089
	Central Atlantic	2.609	-0.011	-1.003
	Lower Atlantic	2.406	-0.018	-1.063
II	Midwest[2]	2.494	-0.032	-1.292
III	Gulf Coast[3]	2.304	-0.013	-1.238
IV	Rocky Mountain	2.488	0.000	-1.279
V	West Coast	2.695	-0.021	-1.067
	West Coast less California	2.602	-0.005	-1.118
	California	2.769	-0.034	-1.028
Total	U.S.	2.482	-0.020	-1.179

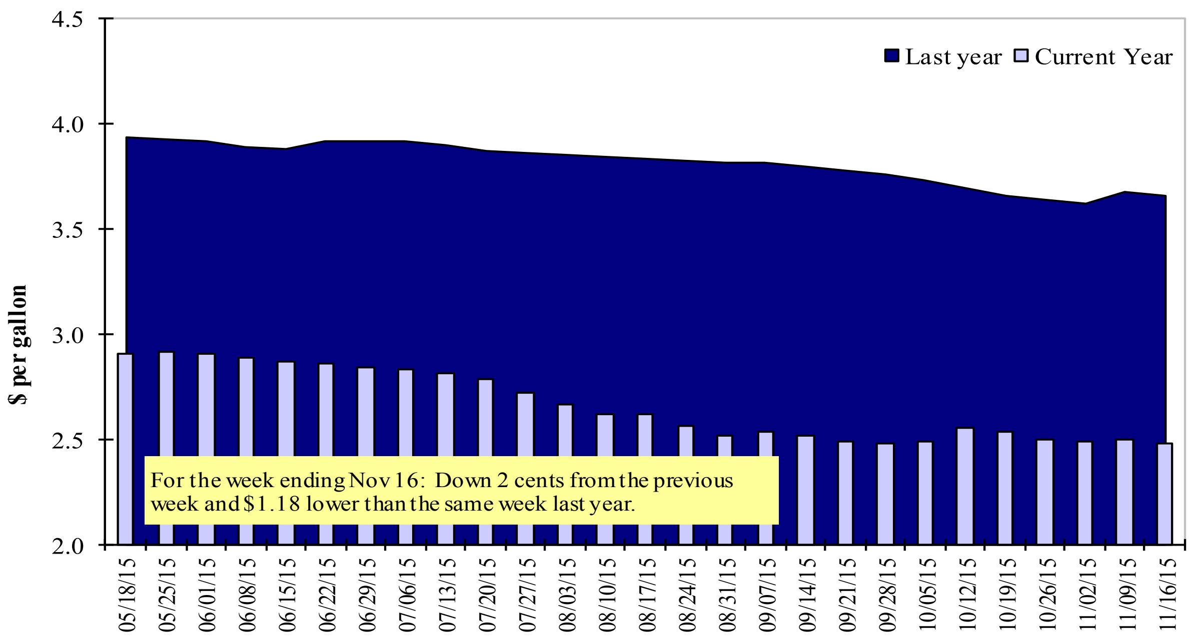
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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
For the week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances[1]									
11/5/2015	1,045	590	1,468	958	48	4,109	8,377	15,708	28,194
This week year ago	1,470	920	1,555	891	94	4,929	12,218	24,081	41,228
Cumulative exports-marketing year[2]									
2015/16 YTD	2,512	1,671	2,774	1,506	489	8,953	5,387	13,433	27,773
2014/15 YTD	3,548	1,990	3,383	1,725	246	10,892	7,508	12,639	31,039
YTD 2015/16 as % of 2014/15	71	84	82	87	199	82	72	106	89
Last 4 wks as % of same period 2014/15	72	66	95	98	97	83	66	73	72
2014/15 Total	7,009	3,654	7,250	3,758	665	22,336	32,194	46,619	101,149
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 Importers[1] of U.S. Corn

For the week ending 11/05/2015	Total Commitments[2] 2015/16 Current MY	2014/15 Last MY	% change current MY from last MY	Exports[3] 3-year avg 2011-2013
	- 1,000 mt -			- 1,000 mt -
Japan	2,168	3,468	(37)	10,079
Mexico	5,427	5,173	5	8,145
Korea	127	550	(77)	2,965
Colombia	13	414	(97)	3,461
Taiwan	264	291	(10)	1,238
Top 5 Importers	**7,998**	**9,895**	**(19)**	**25,887**
Total US corn export sales	**13,763**	**19,726**	**(30)**	**34,445**
% of Projected	30%	42%		
Change from prior week	**619**	**505**		
Top 5 importers' share of U.S. corn export sales	58%	50%		75%
USDA forecast, November 2015	**45,802**	**47,430**	**(3)**	
Corn Use for Ethanol USDA forecast, November 2015	**131,445**	**132,309**	**(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

For the week ending 11/05/2015	Total Commitments[2] 2015/16 Current MY	2014/15 Last MY	% change current MY from last MY	Exports[3] 3-yr avg. 2011-13
	- 1,000 mt -			- 1,000 mt -
China	16,045	22,927	(30)	24,211
Mexico	1,498	1,544	(3)	2,971
Indonesia	457	794	(42)	1,895
Japan	978	764	28	1,750
Taiwan	475	811	(41)	1,055
Top 5 importers	**19,452**	**26,840**	**(28)**	**31,882**
Total US soybean export sales	**29,141**	**36,639**	**(20)**	**39,169**
% of Projected	62%	73%		
Change from prior week	1,208	1,034		
Top 5 importers' share of U.S. soybean export sales	67%	73%		**81%**
USDA forecast, November 2015	**46,730**	**50,218**	**(7)**	

(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

For the week ending 11/05/2015	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	1,260	1,751	(28)	3,113
Mexico	1,304	1,739	(25)	2,807
Nigeria	994	1,657	(40)	2,512
Philippines	1,417	1,355	5	2,105
Brazil	310	1,492	(79)	2,091
Korea	842	925	(9)	1,273
Taiwan	514	612	(16)	1,007
Indonesia	193	349	(45)	751
Colombia	414	414	0	662
Thailand	270	165		618
Top 10 importers	**7,248**	**10,292**	(30)	**16,939**
Total US wheat export sales	**13,062**	**15,821**	**(17)**	**26,361**
% of Projected	60%	68%		
Change from prior week	227	417		
Top 10 importers' share of U.S. wheat export sales	55%	65%		64%
USDA forecast, November 2015	**21,798**	**23,270**	**(6)**	

(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	For the Week Ending 11/12/15	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	119	56	210	9,479	10,979	86	88	100	12,436
Corn	0	0	n/a	7,085	7,460	95	43	20	7,781
Soybeans	620	564	110	8,802	8,027	110	97	122	12,887
Total	**739**	**621**	**119**	**25,366**	**26,466**	**96**	**95**	**114**	**33,104**
Mississippi Gulf									
Wheat	64	83	77	4,014	4,219	95	163	110	4,495
Corn	245	176	139	24,142	27,382	88	53	71	30,912
Soybeans	1,390	1,197	116	22,166	19,241	115	102	105	29,087
Total	**1,699**	**1,457**	**117**	**50,322**	**50,842**	**99**	**91**	**98**	**64,495**
Texas Gulf									
Wheat	67	113	59	3,303	5,622	59	71	61	6,120
Corn	0	0	n/a	624	509	123	n/a	0	580
Soybeans	63	91	70	567	542	104	128	110	949
Total	**130**	**204**	**64**	**4,494**	**6,673**	**67**	**103**	**88**	**7,649**
Interior									
Wheat	21	10	201	1,229	1,225	100	118	94	1,400
Corn	121	112	108	5,457	4,985	109	88	98	5,677
Soybeans	96	112	86	3,204	3,263	98	64	94	4,312
Total	**237**	**234**	**101**	**9,890**	**9,473**	**104**	**88**	**100**	**11,389**
Great Lakes									
Wheat	24	39	61	894	741	121	58	102	935
Corn	0	0	n/a	447	275	163	46	206	288
Soybeans	21	45	47	532	432	123	98	122	988
Total	**45**	**84**	**53**	**1,873**	**1,447**	**129**	**83**	**119**	**2,211**
Atlantic									
Wheat	0	2	0	421	550	77	6	115	553
Corn	0	0	n/a	275	814	34	67	102	816
Soybeans	84	130	65	1,342	1,246	108	145	123	2,119
Total	**84**	**131**	**64**	**2,038**	**2,610**	**78**	**118**	**121**	**3,487**
U.S. total from ports[2]									
Wheat	294	303	97	19,341	23,336	83	88	91	25,939
Corn	366	288	127	38,031	41,424	92	64	75	46,054
Soybeans	2,275	2,139	106	36,612	32,751	112	101	110	50,342
Total	**2,934**	**2,730**	**107**	**93,984**	**97,510**	**96**	**93**	**102**	**122,335**

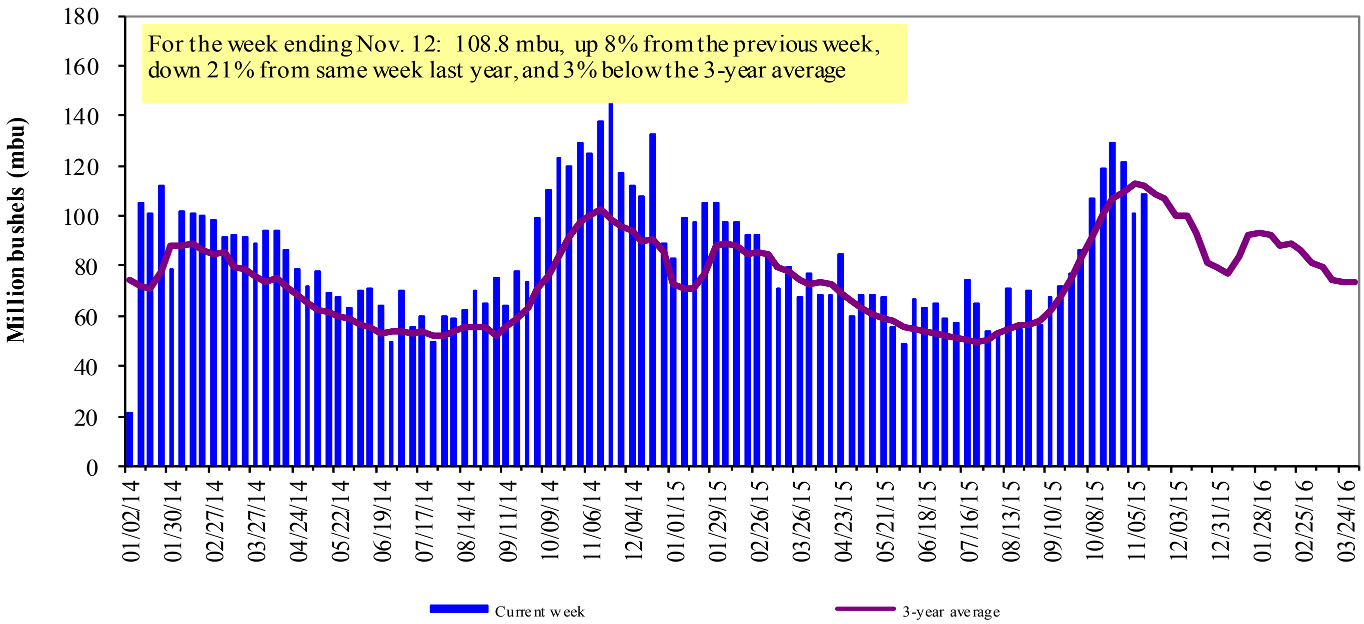
[1] Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

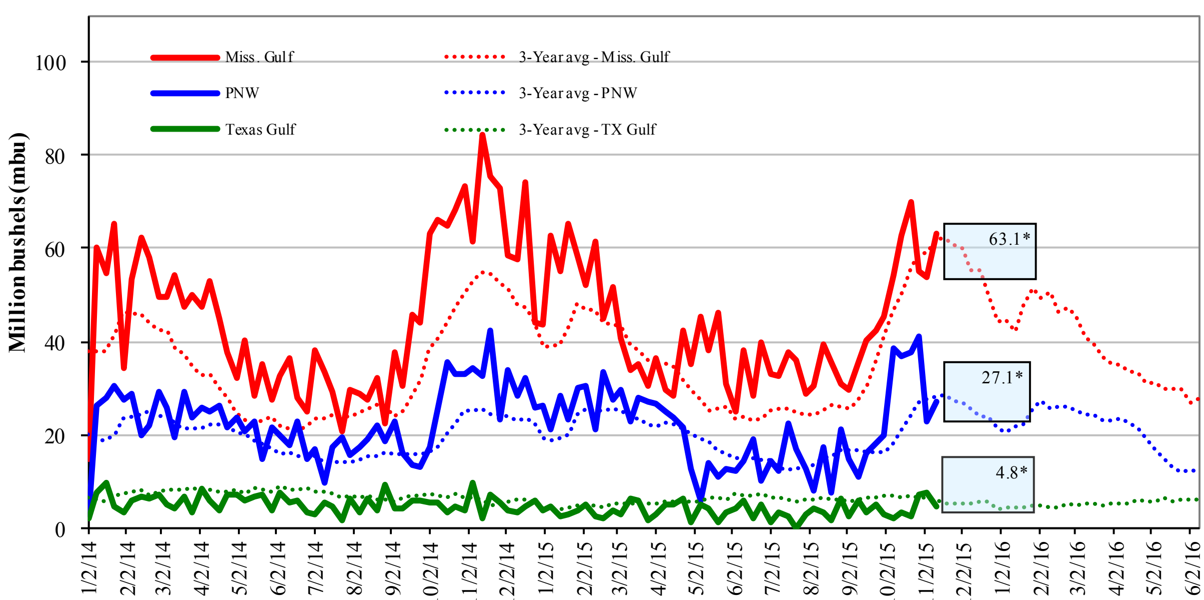


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

November 12: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 17	down 36	up 10	up 19
Last year (same week)	down 25	up 137	down 22	down 16
3-yr avg. (4-wk mov. avg.	up 1	down 23	down 1	down 8

Ocean Transportation

Table 17

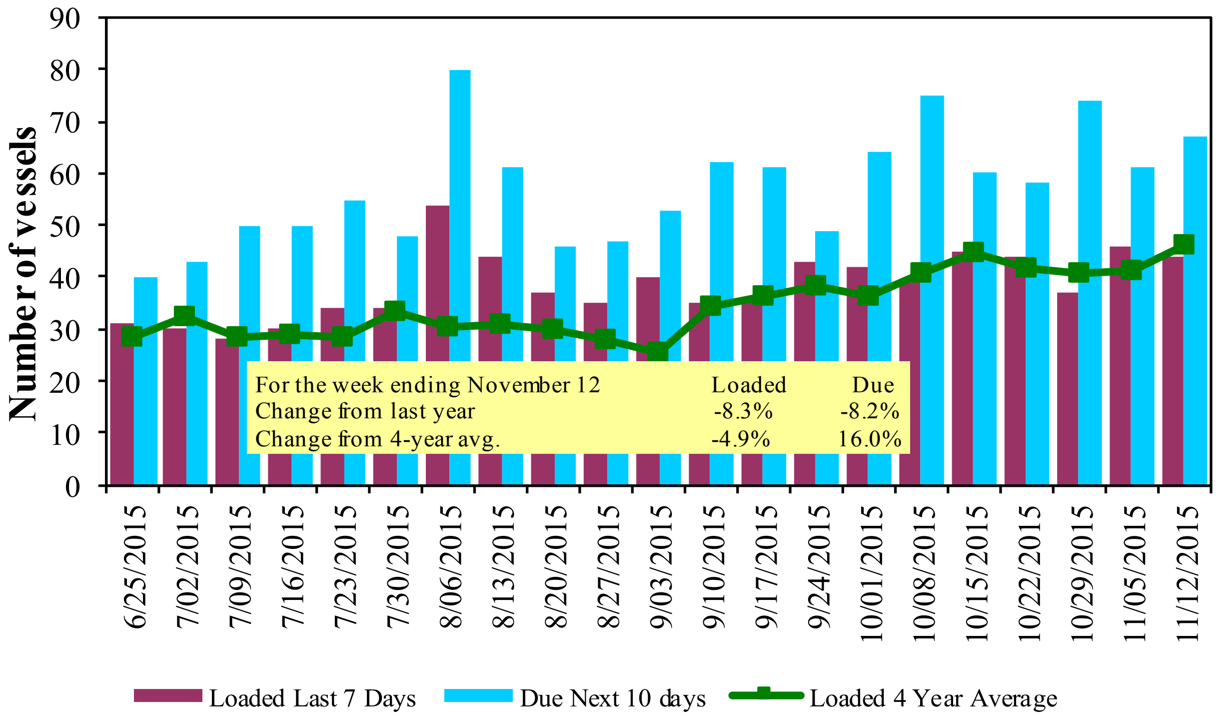
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
11/12/2015	52	44	67	9	n/a
11/5/2015	54	46	61	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

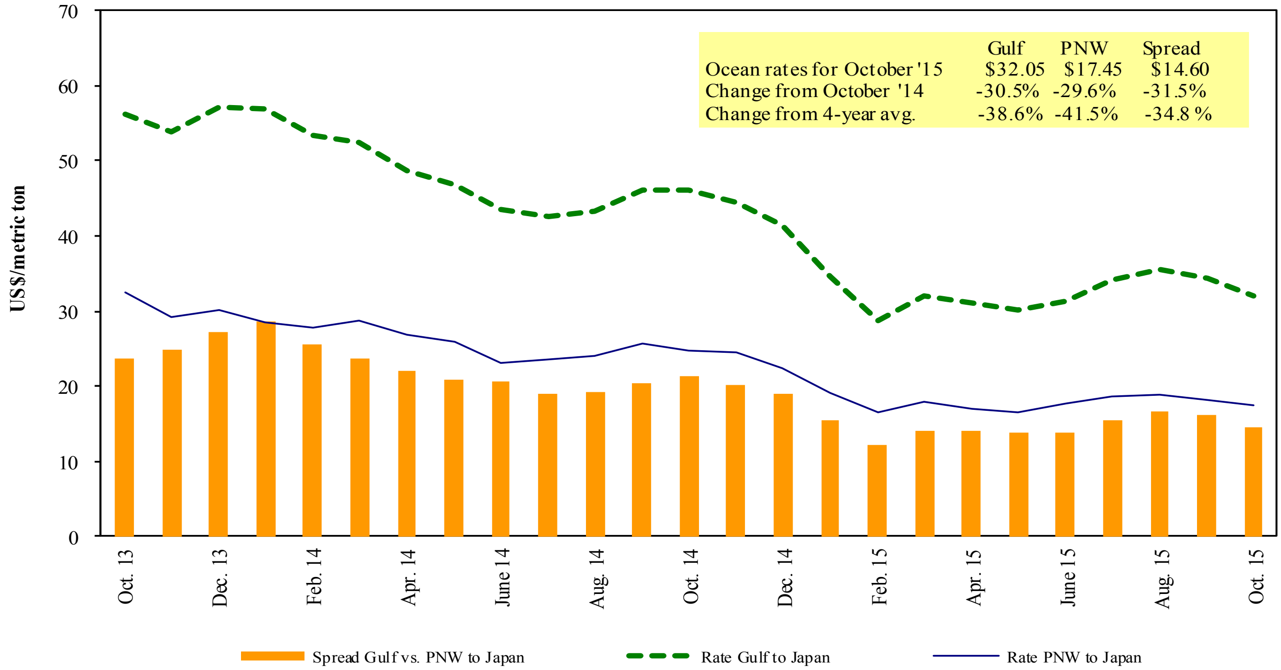
U.S. Gulf[1] Vessel Loading Activity



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 11/14/2015

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Dec 5/14	58,000	28.25
U.S. Gulf	China	Heavy Grain	Nov 25/30	60,000	29.50
U.S. Gulf	China	Heavy Grain	Nov 15/20	60,000	31.00 op 29.50
U.S. Gulf	China	Heavy Grain	Nov 5/15	60,000	29.40
U.S. Gulf	China	Grain	Nov 1/10	60,000	30.75
U.S. Gulf	China	Grain	Nov 1/10	66,000	27.50
U.S. Gulf	China	Heavy Grain	Nov 1/30	55,000	34.50
U.S. Gulf	Guatemala	Soybean Meal	Nov 20/30	18,000	17.75
U.S Gulf	Guatemala	Corn	Nov 20/30	6,000	17.75
U.S. Gulf	Tanzania[1]	Wheat	Nov 24/Dec 3	12,000	148.97
U.S. Gulf	Honduras	Corn	Nov 5/15	6,700	44.00
U.S. Gulf	Japan	Grain	Dec 1/20	55,000	29.50
PNW	China	Heavy Grain	Nov 25/30	60,000	14.50
PNW	China	Heavy Grain	Nov 19/28	60,000	15.50
PNW	China	Heavy Grain	Nov 1/10	60,000	16.10
Brazil	Egypt	Grain	Nov 8/12	60,000	11.75
Lithuania	Kenya	Grain	Nov 7/10	40,000	21.75
Ukraine	Egypt Mediterranean	Grain	Nov 15/18	30,000	11.00

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

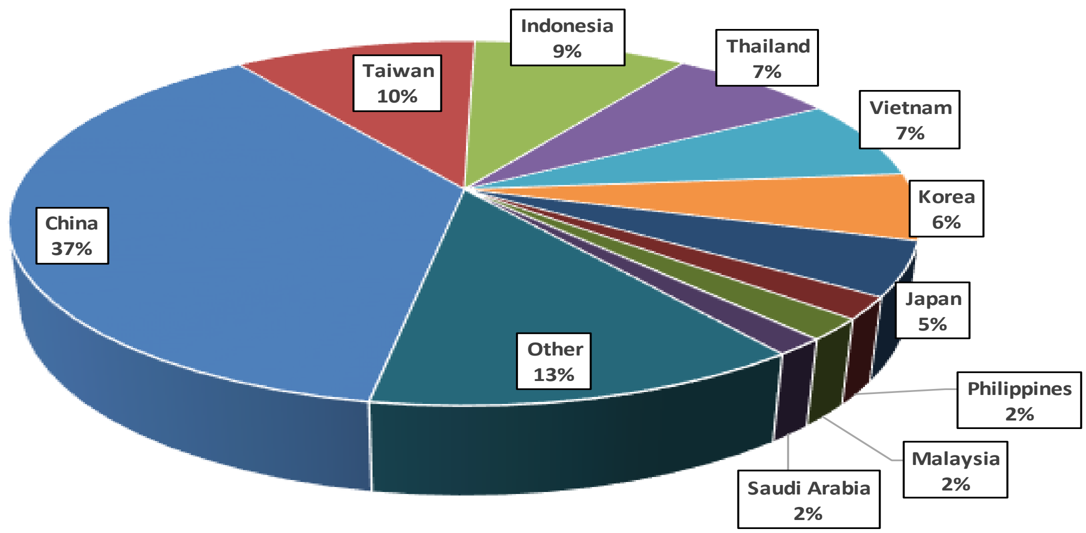
[1]50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 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-July 2015

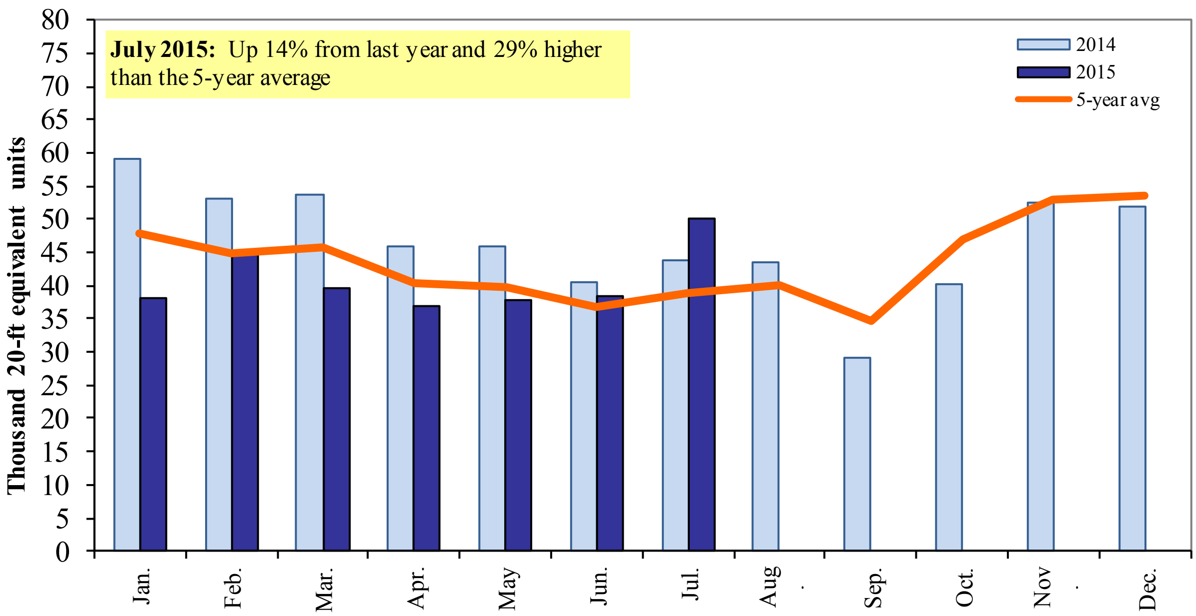


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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