



Grain Transportation Report

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

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January 1, 2015

WEEKLY HIGHLIGHTS

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STC Releases Summary of the Third Biweekly Rail Service Survey

The Soy Transportation Coalition released its third survey of the grain handling facilities in the Upper Midwest. This is a follow-up to the [12/18/2014 GTR](#) feature article. The results of this survey show 78 percent of the respondents reporting that cycle times for railroads are faster than a year ago—an increase from 67 percent in the first survey and 70 percent in the second survey. Past-due metrics also improved, with 54 percent recording no rail orders as past due—an increase from 33 percent in the first survey and 48 percent in the second survey. Only 3 percent reported “more” pressure on storage than last year, and 97 percent responded that storage pressure was “the same,” “less” or “much less” than last year. While fewer rail customers are reporting past due orders, the average number of days past due for those that are experiencing delays increased from 13.4 days in the second survey to 30 days in the third survey.

Grain Inspections Lowest Since Late September

For the week ending December 25, **total inspections of grain** (corn, wheat, and soybeans) from all major export regions reached 2.2 million metric tons (mmt), down 37 percent from the past week, up 4 percent from last year, and 1 percent below the 3-year average. Grain inspections were the lowest since late September and are about average for this time of the year, at the end of harvest and the beginning of the holiday season. Inspections of each of the major grains were also down from the previous week. Corn inspections (.594 mmt) were down 24 percent from the past week, wheat (.198 mmt) down 57 percent, and soybeans (1.5 mmt) down 37 percent.

PMA Requests Federal Mediation Assistance to Further Longshore Labor Negotiations

On December 22, the U.S. Federal Mediation and Conciliation Service (FMCS) announced it received a request from representatives of the Pacific Maritime Association (PMA) to provide mediation services in the PMA’s continuing labor negotiations with the International Longshore and Warehouse Union (ILWU) for a collective bargaining agreement covering all West Coast ports. In accordance with its statutory responsibilities, the FMCS has been closely monitoring these negotiations for some time and has stood ready to provide mediation services at a moment’s notice. FMCS mediators will reach out to the parties to determine whether and when mediation assistance would be most valuable. On December 29, the PMA renewed its call for the assistance of federal mediation in response to an ILWU press release, which reported only a few issues left to resolve.

Snapshots by Sector

Export Sales

During the week ending December 18, **unshipped balances** of wheat, corn, and soybeans totaled 35.3 mmt, 17 percent lower than the same time last year. **Corn** export sales reached 1.7 mmt, down 28 percent from the previous week. **Wheat** reached 0.293 mmt, down 39 percent, and **soybeans**, at 0.636 mmt, were down 9 percent.

Rail

U.S. railroads originated 25,290 **carloads of grain** during the week ending December 20, up 5 percent from last week, 20 percent from last year, and 18 percent from the 3-year average.

During the week ending December 25, average January shuttle **secondary railcar bids/offers per car** were \$88 below tariff, down \$113 from last week and \$1,819 lower than last year. There were no non-shuttle bids/offers.

Barge

During the week ending December 27 **barge grain movements** totaled 610,024 tons—25.6 percent lower than the previous week and 4 percent lower than the same period last year.

During the week ending December 27, 384 grain barges **moved down river**, down 29.2 percent from last week; 479 grain barges were **unloaded in New Orleans**, down 48.3 percent from the previous week.

Ocean

During the week ending December 25, 41 **ocean-going grain vessels** were loaded in the Gulf, 5 percent more than the same period last year. Fifty vessels are expected to be loaded within the next 10 days, 27.5 percent less than the same period last year.

Fuel

During the week ending December 29, U.S. average **diesel fuel prices** decreased 7 cents from the previous week to \$3.21 per gallon—down 69 cents from the same week last year.

Feature Article/Calendar

To Our Readers:

We sincerely appreciate your continued support. Whether you are new to reading our weekly report or have been following us over the years, you may agree that the two consecutive record grain and oilseed fall harvests of 2013 and 2014 have tested the capacity of the U.S. transportation system. In fact, the issue received the attention of the U.S. Senate Commerce, Science, and Transportation Committee, which held a hearing on September 10 titled “Freight Rail Service—Improving the Performance of America’s Rail System.” AMS represented USDA stakeholders at the hearing via a [testimony](#) by AMS Deputy Administrator for Transportation and Marketing Programs, Arthur Neal, Jr.

As always, we strive to provide timely and insightful analysis and information in this report on the most current issues relevant to grain transportation. In addition to keeping up with the weekly market and transportation developments, we filed [five comments](#) with the Surface Transportation Board (STB); informed participants of the 21st Forum of the North American Grain Exporters Association (APPAMEX-NAEGA) about rail service issues; published transportation profiles of corn, wheat, and soybeans; and served as the source of analysis of other relevant agricultural transportation issues. Our recent work can be found under the “What’s New” tab on: www.ams.usda.gov/AgTransportation.

2014 Agricultural Transportation Overview

The main focus of the year has been the worry by many producers and shippers of grain and oilseeds about the ability of rail transportation to move the remainder of last year’s record crop, followed by the 2014/15 record harvest this fall. At the beginning of the year, agricultural shippers were very concerned about rail service delays during a harsh winter and increased demands on the rail network from other commodities. Those worries increased as the fall 2014 harvest began and ultimately turned into another record crop year for corn and soybeans. Some of the key developments in 2014 are highlighted below and once again illustrate the importance of the multimodal nature of the U.S. grain transportation system.

Supply and Demand: In its December World Supply and Demand Estimates report, USDA projected the 2014/15 production of corn, soybeans, and wheat to reach 20.4 billion bushels (bbu), 5 percent higher than the previous year. Exports are projected to reach 4.4 bbu, 6 percent lower than last year. For the first time, soybean exports (1.76 bbu) are projected to be higher than corn exports (1.75 bbu). Soybean exports tend to dominate fall shipments as newly harvested U.S. soybeans are normally in high demand in the fall, before the South American soybean harvest begins in the spring.

Rail: Service issues gradually improved during late November and December as congestion on the railroads began to decrease and the number of grain cars originated increased. U.S. Class I railroads originated 25,290 railcars of grain for the week ending December 20, the third consecutive week of grain carloadings above 24,000 railcars, which has not occurred since October 2010. The current backlog of grain cars is 8,354 past due on BNSF as of December 20 (14 average days late), 2,070 past due on Canadian Pacific as of December 21 (27 average days late), and 6,064 past due on Union Pacific as of December 21 (17 average days late). Shuttle bids in the secondary railcar market, which traded at record premiums to the tariff rate throughout 2014, have fallen to within a normal range in the past 7 weeks, with December bids even trading at a discount to the tariff rate. Average secondary railcar market bids during this 7-week period are about \$1,426 below average bids during the same period last year. This indicates shippers expect the railroad supply of grain cars will be able to meet shipper demand following this year’s harvest, an improvement over last year’s situation.

Barge: For the last 4 years, weather conditions hampered river navigation with periods of drought and flood as well as unusually large ice accumulations during early 2014. Despite the long and harsh winter early in the year, total grain barge tonnages in 2014 reached 35.1 million tons, the highest since 2006. This was 46 percent higher than last year and 25 percent higher than the 3-year average. During late September, barge rates reached unprecedented highs, with spot rates ranging from 883 to 1,100 percent of the benchmark tariff (\$33.50 to \$54.66 per ton). However, since then, barge rates have declined considerably and are ranging from 245 to 400 percent of tariff (\$7.69 to 19.77 per ton).

Ocean: Many ocean shipping analysts expected 2014 to be a year in which rates increased, but this did not materialize; the last quarter of 2014 saw a slight surge in the number of grain vessels shipped, in spite of the usual seasonal holiday slowdown. Freight markets in 2014 started out the year with Gulf-to-China Panamax rates at \$58.00 per metric ton (mt) and PNW rates to China at \$28.50 per mt. This week, U.S. Gulf rates to China are down \$18.00 per mt or 32 percent and PNW rates are down by \$8.00 per mt or 28 percent from the beginning of the year.

Fuel: For the first half of the year, diesel fuel prices in 2014 were well above the 5-year average. However, prices began to fall during the summer and began a steeper decline through the fall, ending the year falling 39 cents in 4 weeks. Crude oil prices, which fell as much as 30 percent in November, have kept diesel fuel prices low during the latter portion of the year.

Happy New Year

We are thankful for another great year and look forward to serving as a valuable source of agricultural transportation knowledge in 2015 to help you make informed marketing and transportation decisions. We thank all the industry and Government representatives who regularly and voluntarily provide us with the necessary information and data on which we rely to produce this report. We wish you a healthy and prosperous New Year!

Sincerely, [The Grain Transportation Report Team](#)

Rail Transportation

Table 3

Rail Deliveries to Port (carloads)¹

Week ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border
	Gulf	Texas Gulf	Northwest	East Gulf			Mexico ³
12/24/2014 ^p	1,736	1,883	6,333	1,092	11,044	12/20/2014	1,369
12/17/2014 ^r	1,493	1,759	5,996	1,052	10,300	12/13/2014	1,665
2014 YTD ^r	43,491	82,505	251,386	31,226	408,608	2014 YTD	96,967
2013 YTD ^r	31,646	71,388	168,826	25,176	297,036	2013 YTD	70,298
2014 YTD as % of 2013 YTD	137	116	149	124	138	% change YTD	138
Last 4 weeks as % of 2013 ²	106	178	121	97	122	Last 4wks % 2013	93
Last 4 weeks as % of 4-year avg. ²	150	173	139	124	144	Last 4wks % 4 yr	103
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	70,298
Total 2012	22,604	40,780	199,419	24,659	287,462	Total 2012	92,008

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 approximately 15 percent below the Association of American Railroads reported weekly carloads received by Mexican railroads to reflect switching between KCSM and FerroMex.

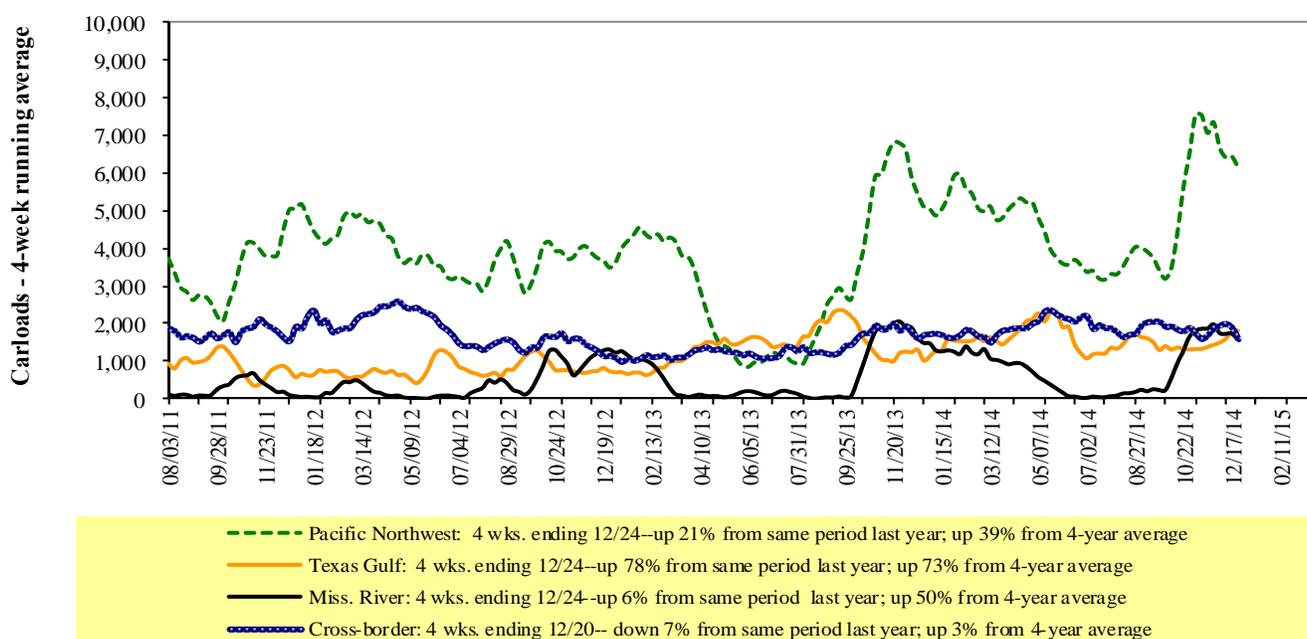
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 29 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

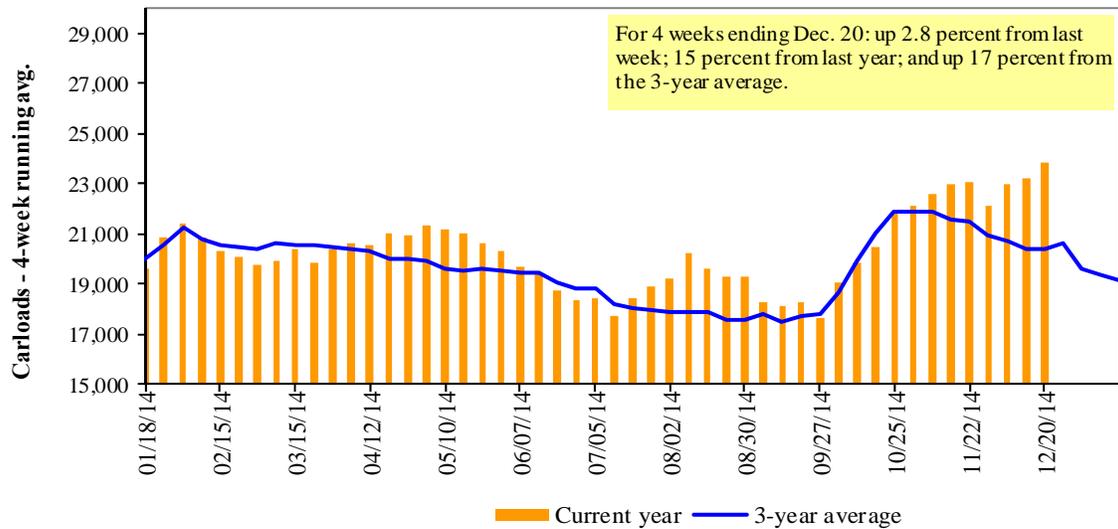
Table 4

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

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
12/20/14	2,777	3,538	12,395	1,073	5,507	25,290	4,814	4,916
This week last year	2,252	3,114	8,974	1,019	5,671	21,030	4,568	4,578
2014 YTD	99,085	147,977	463,556	45,943	286,095	1,042,656	234,407	266,642
2013 YTD	84,715	134,770	446,936	34,553	216,921	917,895	187,078	268,465
2014 YTD as % of 2013 YTD	117	110	104	133	132	114	125	99
Last 4 weeks as % of 2013	105	109	128	88	105	114	111	100
Last 4 weeks as % of 3-yr avg. ¹	121	113	110	133	118	114	121	87
Total 2013	86,466	137,915	454,262	34,412	222,258	935,313	190,125	272,753

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

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

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

Source: Association of American Railroads

Table 5

Railcar Auction Offerings¹ (\$/car)²

Week ending	Delivery period							
	Jan-15	Jan-14	Feb-15	Feb-14	Mar-15	Mar-14	Apr-15	Apr-14
12/25/2014								
BNSF ³								
COT grain units	no offer	no offer	no offer	no offer	no offer	no offer	no offer	262
COT grain single-car ⁵	no offer	no offer	no offer	no offer	no offer	no offer	no offer	27. .150
UP ⁴								
GCAS/Region 1	no offer	1	no offer	no bids	no offer	no bids	n/a	n/a
GCAS/Region 2	no offer	297	no offer	76	no offer	11	n/a	n/a

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

²Average premium/discount to tariff, last auction

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

⁴UP - GCAS = Grain Car Allocation System

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

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

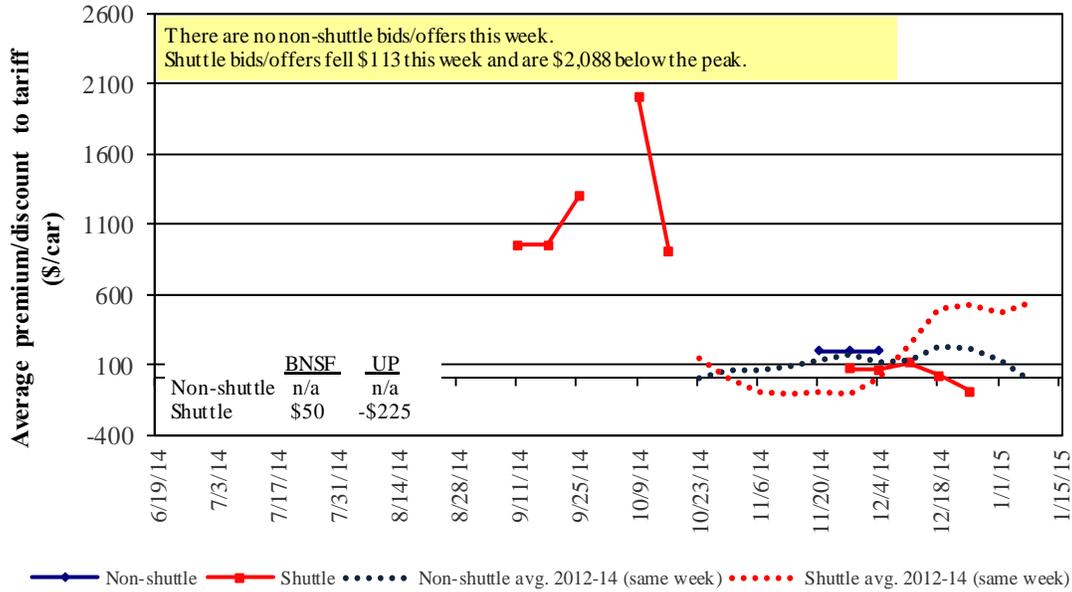
⁵Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

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

Figure 4

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

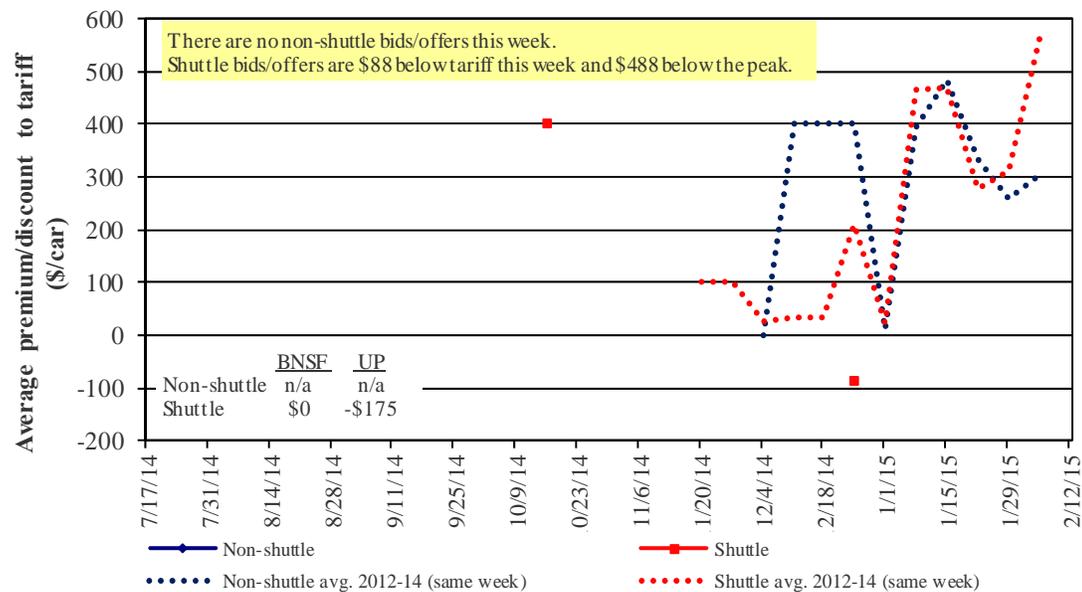


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

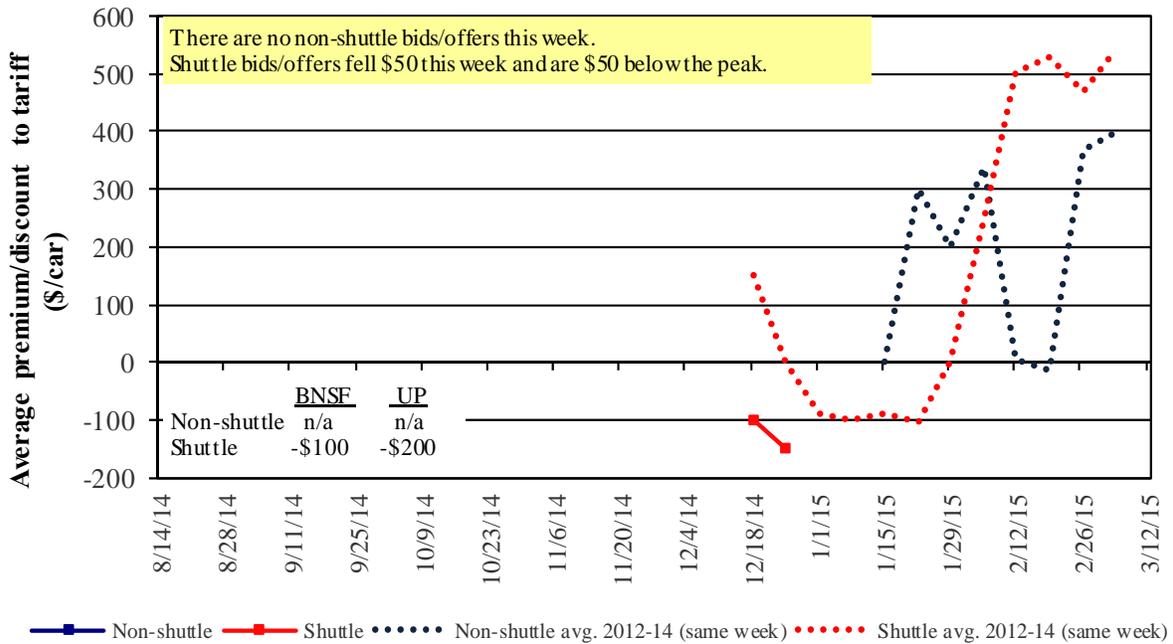


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in March 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 12/25/2014	Delivery period					
	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15
Non-shuttle						
BNSF-GF	n/a	n/a	n/a	n/a	n/a	n/a
Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	n/a	n/a	n/a	n/a	n/a	n/a
Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	50	-	(100)	n/a	n/a	n/a
Change from last week	-	n/a	-	n/a	n/a	n/a
Change from same week 2014	(2,350)	(1,300)	(600)	n/a	n/a	n/a
UP-Pool	(225)	(175)	(200)	n/a	n/a	n/a
Change from last week	(225)	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	(1,288)	(625)	(350)	n/a	n/a	n/a

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

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

Data from 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
12/1/2014	metric ton					bushel ²		
Unit train								
Wheat	Wichita, KS	St. Louis, MO	\$3,387	\$162	\$35.24	\$0.96	5	
	Grand Forks, ND	Duluth-Superior, MN	\$3,596	\$89	\$36.60	\$1.00	0	
	Wichita, KS	Los Angeles, CA	\$6,244	\$459	\$66.56	\$1.81	-1	
	Wichita, KS	New Orleans, LA	\$4,026	\$285	\$42.81	\$1.17	4	
	Sioux Falls, SD	Galveston-Houston, TX	\$5,824	\$377	\$61.58	\$1.68	-1	
	Northwest KS	Galveston-Houston, TX	\$4,293	\$312	\$45.73	\$1.24	4	
	Amarillo, TX	Los Angeles, CA	\$4,492	\$434	\$48.92	\$1.33	3	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,328	\$322	\$36.25	\$0.92	3	
	Toledo, OH	Raleigh, NC	\$4,875	\$372	\$52.11	\$1.32	3	
	Des Moines, IA	Davenport, IA	\$2,168	\$68	\$22.21	\$0.56	4	
	Indianapolis, IN	Atlanta, GA	\$4,211	\$280	\$44.59	\$1.13	3	
	Indianapolis, IN	Knoxville, TN	\$3,593	\$179	\$37.46	\$0.95	3	
	Des Moines, IA	Little Rock, AR	\$3,308	\$200	\$34.84	\$0.88	2	
	Des Moines, IA	Los Angeles, CA	\$5,365	\$583	\$59.07	\$1.50	1	
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,839	\$350	\$41.60	\$1.13	5	
	Toledo, OH	Huntsville, AL	\$3,807	\$264	\$40.43	\$1.10	2	
	Indianapolis, IN	Raleigh, NC	\$4,946	\$375	\$52.84	\$1.44	3	
	Indianapolis, IN	Huntsville, AL	\$3,499	\$179	\$36.53	\$0.99	3	
	Champaign-Urbana, IL	New Orleans, LA	\$3,974	\$322	\$42.66	\$1.16	5	
Shuttle Train								
Wheat	Great Falls, MT	Portland, OR	\$3,678	\$264	\$39.15	\$1.07	-1	
	Wichita, KS	Galveston-Houston, TX	\$3,471	\$206	\$36.51	\$0.99	-9	
	Chicago, IL	Albany, NY	\$4,140	\$349	\$44.58	\$1.21	3	
	Grand Forks, ND	Portland, OR	\$5,159	\$456	\$55.76	\$1.52	-1	
	Grand Forks, ND	Galveston-Houston, TX	\$6,084	\$475	\$65.13	\$1.77	-1	
	Northwest KS	Portland, OR	\$5,260	\$512	\$57.32	\$1.56	3	
	Corn	Minneapolis, MN	Portland, OR	\$5,000	\$555	\$55.17	\$1.40	-2
Sioux Falls, SD		Tacoma, WA	\$4,960	\$509	\$54.30	\$1.38	-2	
Champaign-Urbana, IL		New Orleans, LA	\$3,147	\$322	\$34.45	\$0.88	3	
Lincoln, NE		Galveston-Houston, TX	\$3,510	\$296	\$37.80	\$0.96	-1	
Des Moines, IA		Amarillo, TX	\$3,690	\$252	\$39.14	\$0.99	2	
Minneapolis, MN		Tacoma, WA	\$5,000	\$551	\$55.12	\$1.40	-2	
Council Bluffs, IA		Stockton, CA	\$4,400	\$570	\$49.35	\$1.25	-2	
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,520	\$509	\$59.87	\$1.63	-1	
	Minneapolis, MN	Portland, OR	\$5,530	\$555	\$60.43	\$1.64	-1	
	Fargo, ND	Tacoma, WA	\$5,430	\$452	\$58.41	\$1.59	-1	
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$371	\$47.63	\$1.30	4	
	Toledo, OH	Huntsville, AL	\$2,982	\$264	\$32.24	\$0.88	3	
	Grand Island, NE	Portland, OR	\$5,360	\$524	\$58.43	\$1.59	3	

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

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

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

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

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

Table 8

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

Effective date: 12/1/2014

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel	Tariff plus surcharge per:		Percent change Y/Y ⁴
				surcharge per car ²	metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$6,760	\$482	\$74.00	\$2.01	5
	OK	Cuautitlan, EM	\$6,465	\$586	\$72.04	\$1.96	3
	KS	Guadalajara, JA	\$7,049	\$566	\$77.81	\$2.12	5
	TX	Salinas Victoria, NL	\$3,885	\$221	\$41.95	\$1.14	30
Corn	IA	Guadalajara, JA	\$8,049	\$666	\$89.04	\$2.26	0
	SD	Celaya, GJ	\$7,656	\$631	\$84.68	\$2.15	-1
	NE	Queretaro, QA	\$7,535	\$591	\$83.03	\$2.11	1
	SD	Salinas Victoria, NL	\$5,880	\$480	\$64.98	\$1.65	-1
	MO	Tlalnepantla, EM	\$6,887	\$575	\$76.24	\$1.93	0
	SD	Torreon, CU	\$6,722	\$529	\$74.08	\$1.88	-1
Soybeans	MO	Bojay (Tula), HG	\$8,111	\$562	\$88.61	\$2.41	2
	NE	Guadalajara, JA	\$8,572	\$642	\$94.14	\$2.56	0
	IA	El Castillo, JA	\$8,855	\$627	\$96.89	\$2.63	-1
	KS	Torreon, CU	\$6,989	\$398	\$75.48	\$2.05	1
Sorghum	TX	Guadalajara, JA	\$6,953	\$411	\$75.24	\$1.91	2
	NE	Celaya, GJ	\$7,287	\$573	\$80.31	\$2.04	-1
	KS	Queretaro, QA	\$6,795	\$360	\$73.10	\$1.86	-4
	NE	Salinas Victoria, NL	\$5,500	\$422	\$60.50	\$1.54	-3
	NE	Torreon, CU	\$6,318	\$470	\$69.36	\$1.76	-1

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

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

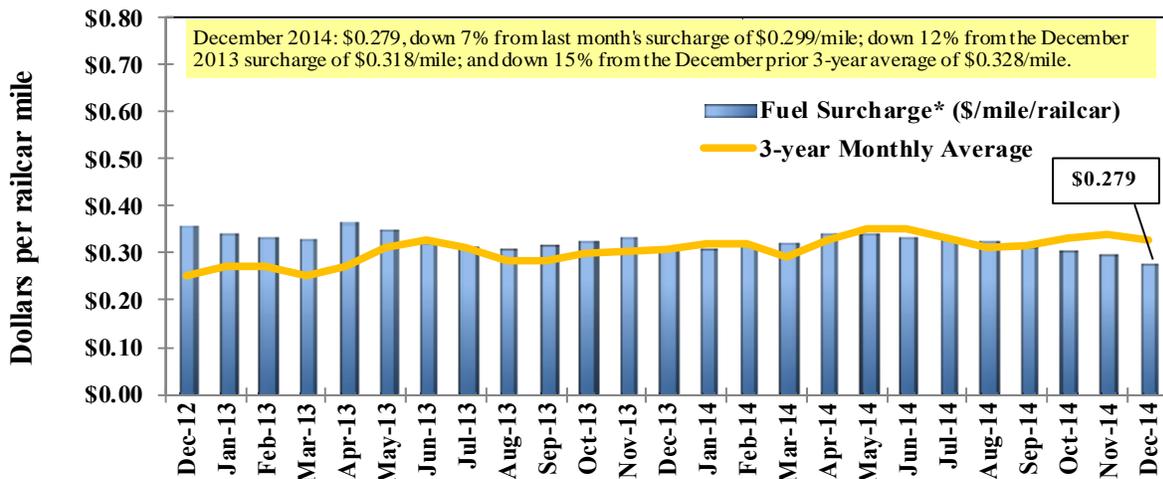
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹



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

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

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

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate ¹	12/30/2014	-	-	390	265	400	400	245
	12/23/2014	-	-	447	302	423	423	260
\$/ton	12/30/2014	-	-	18.10	10.57	18.76	16.16	7.69
	12/23/2014	-	-	20.74	12.05	19.84	17.09	8.16
Current week % change from the same week:								
	Last year	-	-	-34	-41	-8	-8	-18
	3-year avg. ²	-	-	-21	-34	-2	-2	-17
Rate ¹	January	-	-	400	278	395	395	250
	March	-	415	395	278	395	395	230

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

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

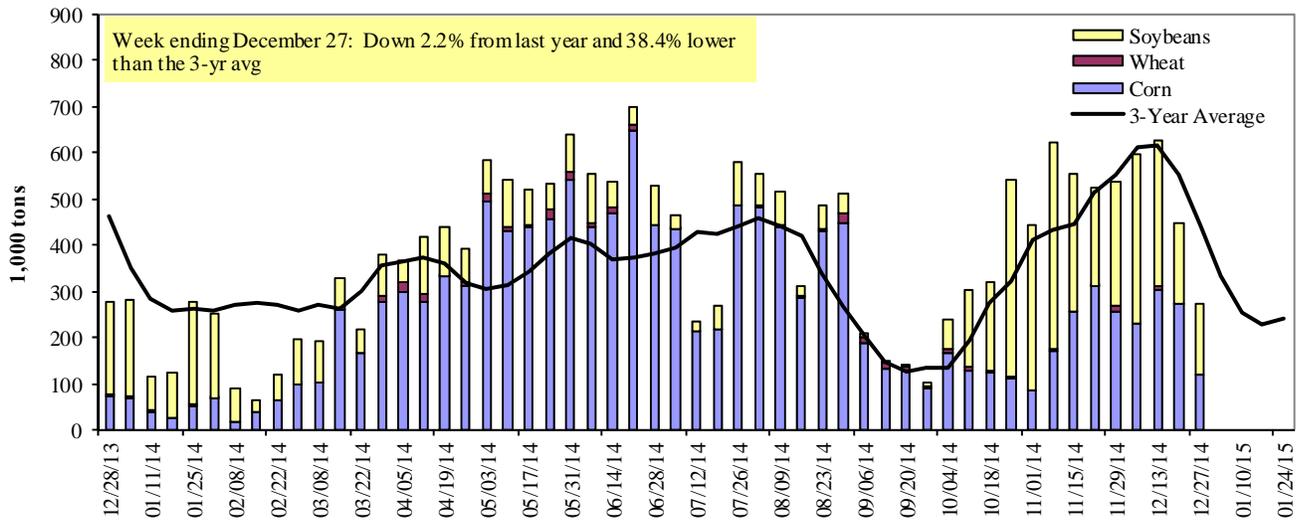
(Rate * 1976 tariff benchmark rate per ton)/100

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)

Week ending 12/27/2014	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	8	0	3	0	11
Alton, IL (L26)	105	0	146	10	260
Granite City, IL (L27)	120	0	152	10	282
Illinois River (L8)	84	0	134	10	227
Ohio River (L52)	94	3	154	0	251
Arkansas River (L1)	0	10	67	0	77
Weekly total - 2014	214	13	373	10	610
Weekly total - 2013	203	21	393	18	636
2014 YTD ¹	20,727	2,182	11,885	263	35,058
2013 YTD	9,504	4,111	10,065	255	23,935
2014 as % of 2013 YTD	218	53	118	103	146
Last 4 weeks as % of 2013 ²	126	57	112	136	116
Total 2013	9,504	4,111	10,065	255	23,935

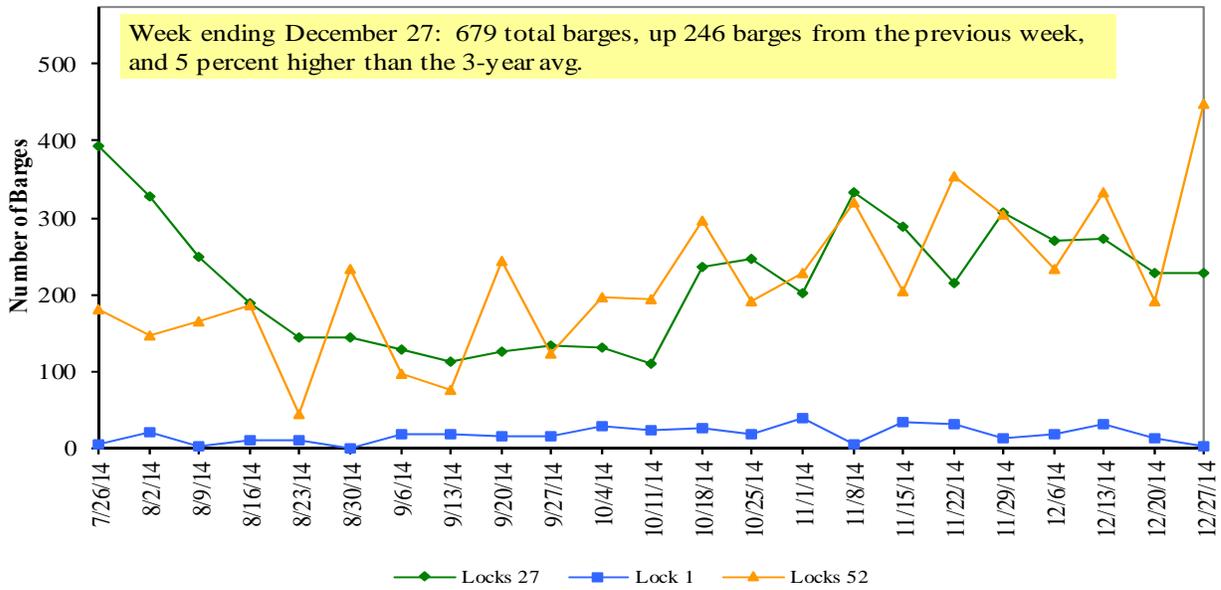
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2013.

Note: Total may not add exactly, due to rounding

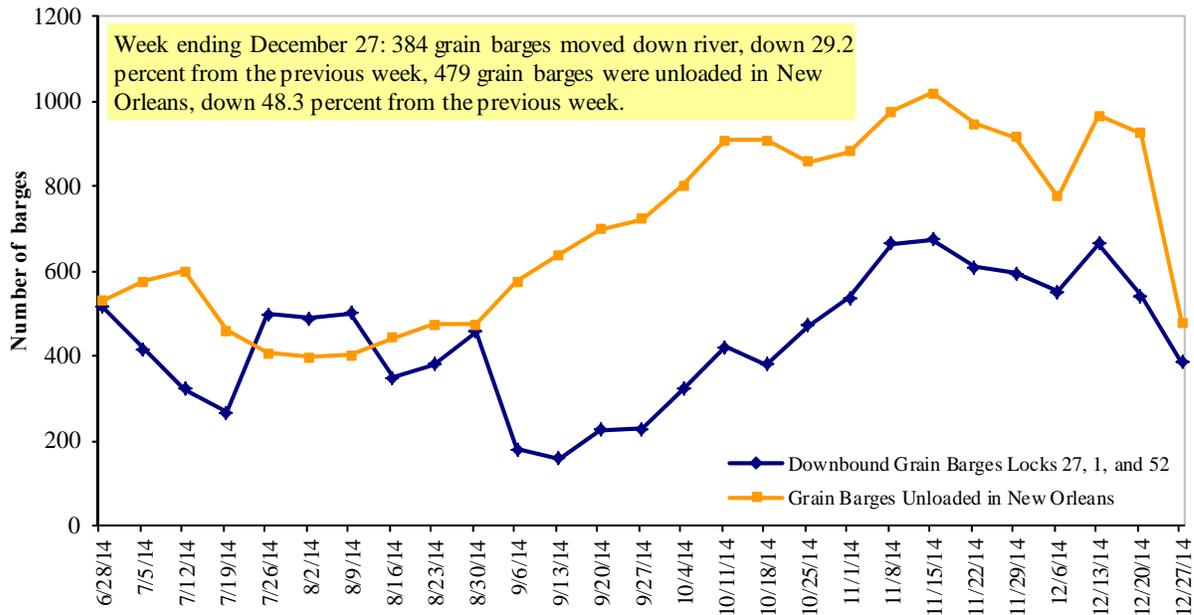
Source: U.S. Army Corps of Engineers

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 12/29/2014 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.257	-0.053	-0.686
	New England	3.365	-0.060	-0.746
	Central Atlantic	3.350	-0.042	-0.666
	Lower Atlantic	3.161	-0.062	-0.695
II	Midwest ²	3.206	-0.088	-0.681
III	Gulf Coast ³	3.121	-0.054	-0.668
IV	Rocky Mountain	3.239	-0.099	-0.650
V	West Coast	3.269	-0.061	-0.756
	West Coast less California	3.155	-0.073	-0.775
	California	3.364	-0.051	-0.740
Total	U.S.	3.213	-0.068	-0.690

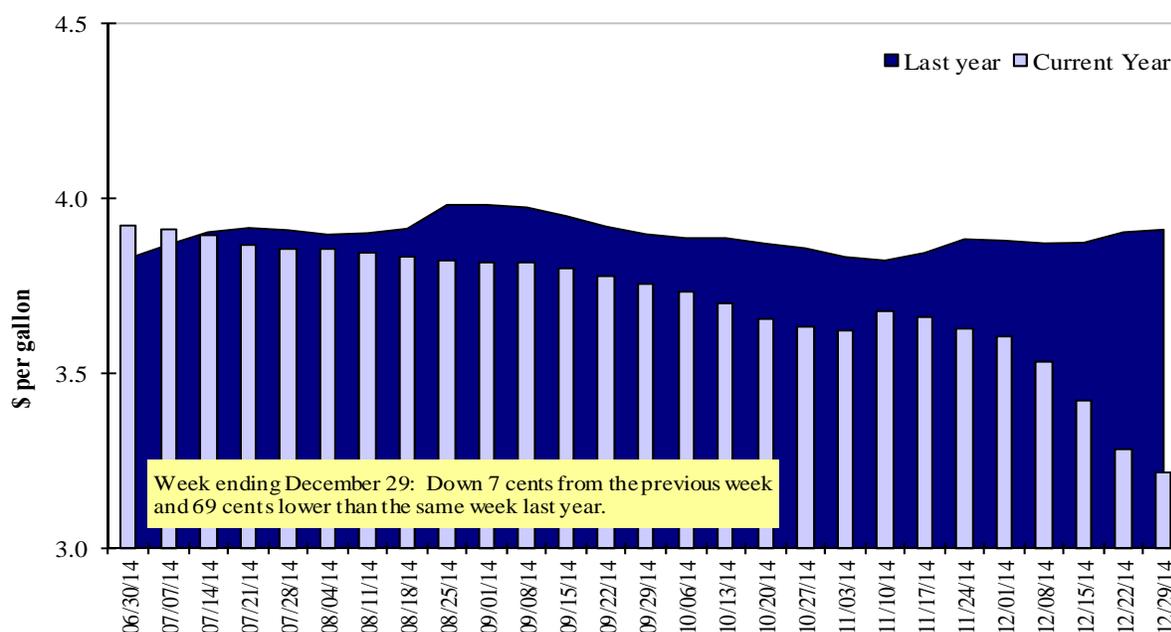
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

²Same as North Central ³Same as South Central

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

Figure 13

Weekly Diesel Fuel Prices, U.S. Average



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

Grain Exports

Table 12

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

Week ending	Wheat					All wheat	Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR				
Export Balances¹									
12/18/2014	1,453	877	1,654	908	87	4,978	14,623	14,781	34,382
This week year ago	1,721	1,108	1,577	960	141	5,508	17,881	17,824	41,213
Cumulative exports-marketing year²									
2014/15 YTD	4,097	2,220	4,179	2,226	444	13,166	11,489	27,012	51,667
2013/14 YTD	7,361	5,529	3,278	2,318	238	18,723	10,031	21,860	50,614
YTD 2014/15 as % of 2013/14	56	40	127	96	187	70	115	124	102
Last 4 wks as % of same period 2013/14	85	79	102	96	82	91	78	96	87
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 corn and soybeans

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

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

Table 13

Top 5 Importers¹ of U.S. Corn

Week ending 12/18/2014	Total Commitments ²		% change current MY from last MY	Exports ³ 3-year avg 2011-2013
	2014/15 Current MY	2013/14 Last MY		
- 1,000 mt -				
Japan	5,446	4,814	13	10,079
Mexico	6,329	7,718	(18)	8,145
Korea	921	1,144	(19)	2,965
Colombia	2,007	1,051	91	3,461
Taiwan	486	563	(14)	1,238
Top 5 Importers	15,190	15,288	(1)	25,887
Total US corn export sales	26,112	27,912	(6)	34,445
% of Projected	59%	57%		
Change from prior week	1,706	1,414		
Top 5 importers' share of U.S. corn export sales	58%	55%		75%
USDA forecast, December 2014	44,450	48,700	(9)	
Corn Use for Ethanol USDA forecast, December 2014	130,810	130,404	0.3	

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

Table 14

Top 5 Importers¹ of U.S. Soybeans

Week Ending 12/18/2014	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg. 2011-13
	2014/15 Current MY	2013/14 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	26,211	25,349	3	24,211
Mexico	1,966	1,818	8	2,971
Indonesia	997	1,045	(5)	1,895
Japan	1,147	1,035	11	1,750
Taiwan	1,043	888	17	1,055
Top 5 importers	31,364	30,135	4	31,882
Total US soybean export sales	41,793	39,685	5	39,169
% of Projected	87%	89%		
Change from prior week*	636	720		
Top 5 importers' share of U.S. soybean export sales	75%	76%		81%
USDA forecast, December 2014	47,900	44,820	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/>³ FAS 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

Week Ending 12/18/2014	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2011-2013
	2014/15 Current MY	2013/14 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,431	1,860	31	3,243
Mexico	2,063	2,299	(10)	3,066
Nigeria	1,765	2,141	(18)	2,960
Philippines	1,522	1,356	12	2,006
China	215	4,137	(95)	1,830
Brazil	1,458	3,471	(58)	1,617
Korea	1,098	963	14	1,552
Taiwan	713	731	(2)	969
Indonesia	399	667	(40)	813
Colombia	492	529	(7)	610
Top 10 importers	12,156	18,153	(33)	18,665
Total US wheat export sales	18,145	24,231	(25)	27,696
% of Projected	72%	76%		
Change from prior week*	293	597		
Top 10 importers' share of U.S. wheat export sales	67%	75%		67%
USDA forecast, December 2014	25,170	32,010	(21)	

(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 12/25/14	Previous Week ¹	Current Week as % of Previous	2014 YTD ¹	2013 YTD ¹	2014 YTD as % of 2013 YTD	Last 4-weeks as % of		Total ¹ 2013
							2013	3-yr. avg.	
Pacific Northwest									
Wheat	103	268	38	12,153	11,571	105	82	89	11,571
Corn	17	52	34	7,680	2,967	259	17	20	2,967
Soybeans	558	558	100	12,458	9,079	137	228	271	9,079
Total	678	878	77	32,292	23,618	137	117	135	23,618
Mississippi Gulf									
Wheat	17	33	51	4,397	9,700	45	29	33	9,700
Corn	470	647	73	30,566	14,803	206	108	125	14,803
Soybeans	619	1,293	48	28,316	21,436	132	108	142	21,436
Total	1,105	1,973	56	63,278	45,939	138	104	131	45,939
Texas Gulf									
Wheat	60	95	63	6,141	9,028	68	48	52	9,028
Corn	0	0	n/a	580	255	228	36	60	255
Soybeans	61	34	180	880	907	97	148	159	907
Total	121	129	94	7,602	10,190	75	64	72	10,190
Interior									
Wheat	18	14	132	1,381	1,063	130	93	155	1,242
Corn	106	80	133	5,517	3,936	140	70	83	3,936
Soybeans	64	139	46	4,181	3,208	130	76	155	3,208
Total	189	233	81	11,079	8,207	135	125	116	8,386
Great Lakes									
Wheat	0	57	0	909	883	103	113	189	883
Corn	0	0	n/a	302	0	n/a	n/a	579	0
Soybeans	68	127	53	988	698	141	228	236	698
Total	68	183	37	2,199	1,581	139	179	224	1,581
Atlantic									
Wheat	1	0	n/a	548	644	85	n/a	n/a	644
Corn	1	1	n/a	817	242	338	9	9	242
Soybeans	87	150	58	2,061	1,650	125	95	129	1,650
Total	89	151	59	3,425	2,536	135	93	124	2,536
U.S. total from ports²									
Wheat	198	466	43	25,529	32,889	78	70	78	33,069
Corn	594	779	76	45,463	22,202	205	76	90	22,202
Soybeans	1,457	2,302	63	48,884	36,980	132	134	169	36,980
Total	2,249	3,547	63	119,876	92,071	130	106	129	92,251

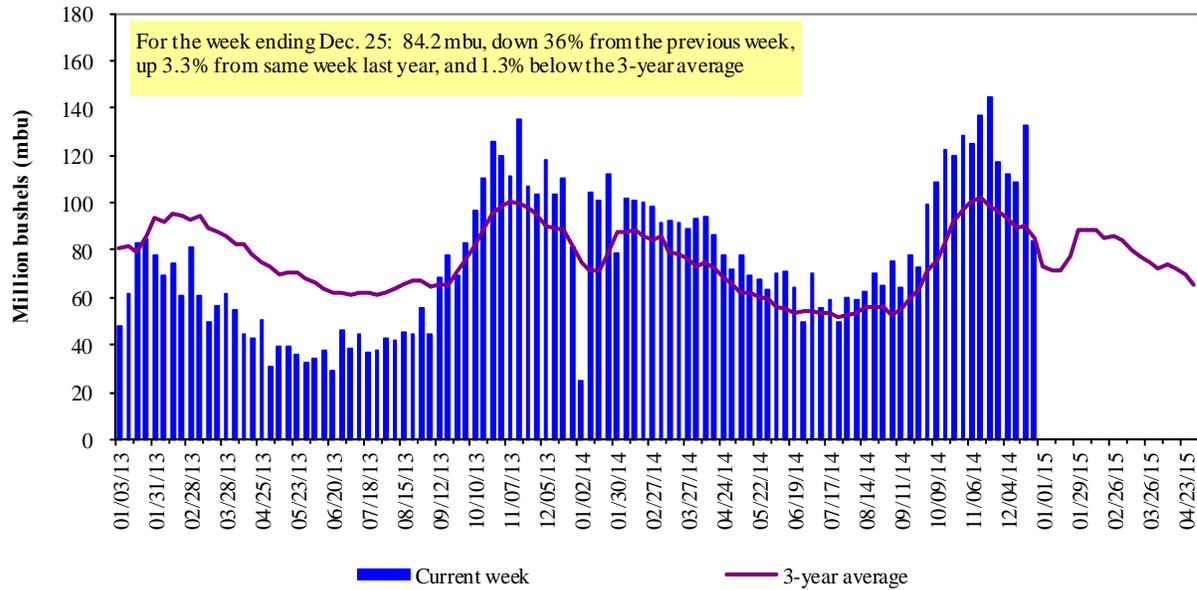
¹ Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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 61 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2013.

Figure 14

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

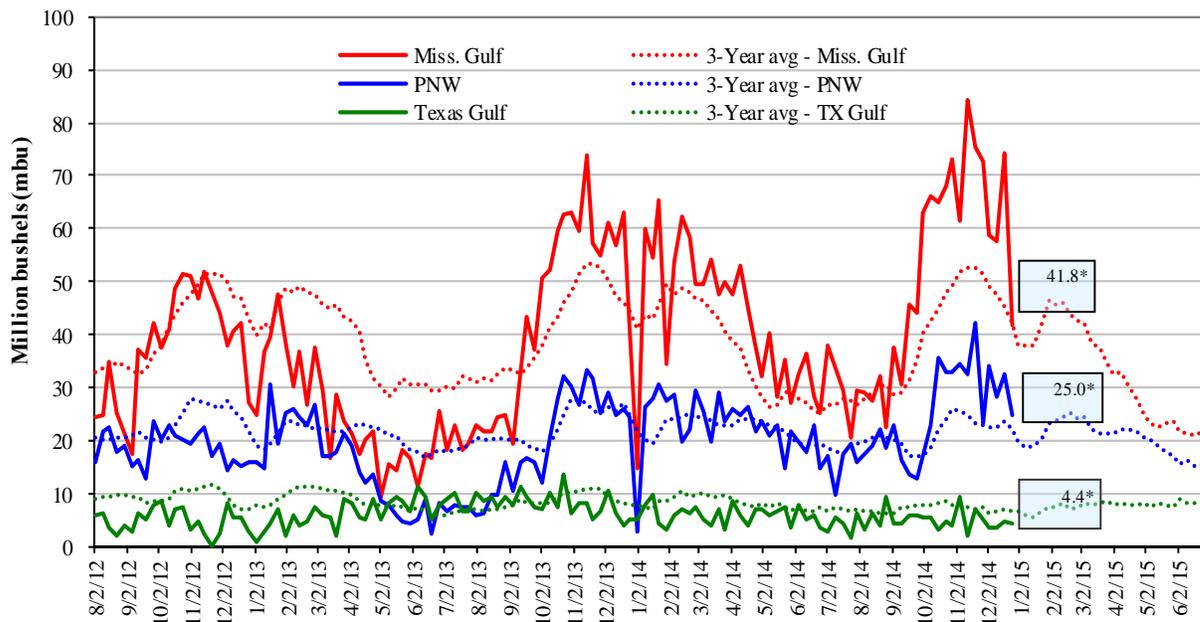


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

<u>Dec 25: % change from:</u>	<u>MSGulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Last week	down 44	down 7	down 41	down 23
Last year (same week)	up 1	down 16	down 1	up 2
3-yr avg. (4-wk mov. avg.)	down 6	down 22	down 8	up 25

Ocean Transportation

Table 17

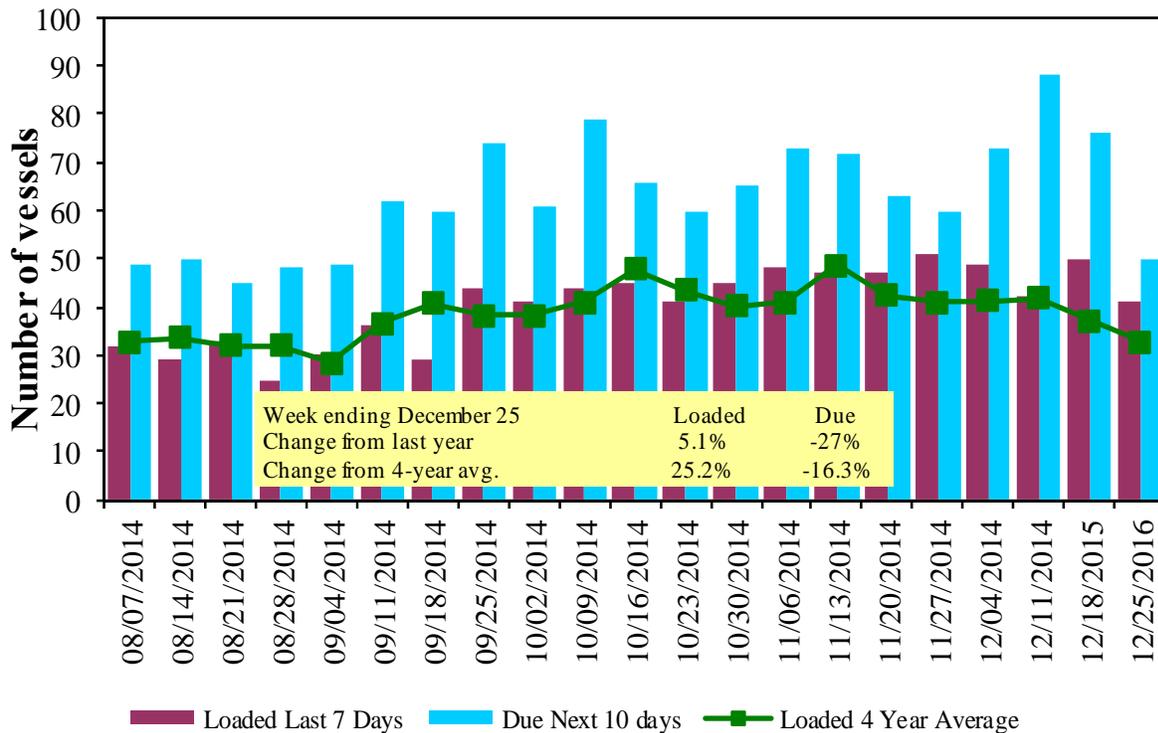
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
12/25/2014	40	41	50	14	n/a
12/18/2014	33	50	76	16	n/a
2013 range	(16..60)	(20..56)	(31..81)	(0..24)	n/a
2013 avg.	32	33	51	12	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

U.S. Gulf¹ Vessel Loading Activity

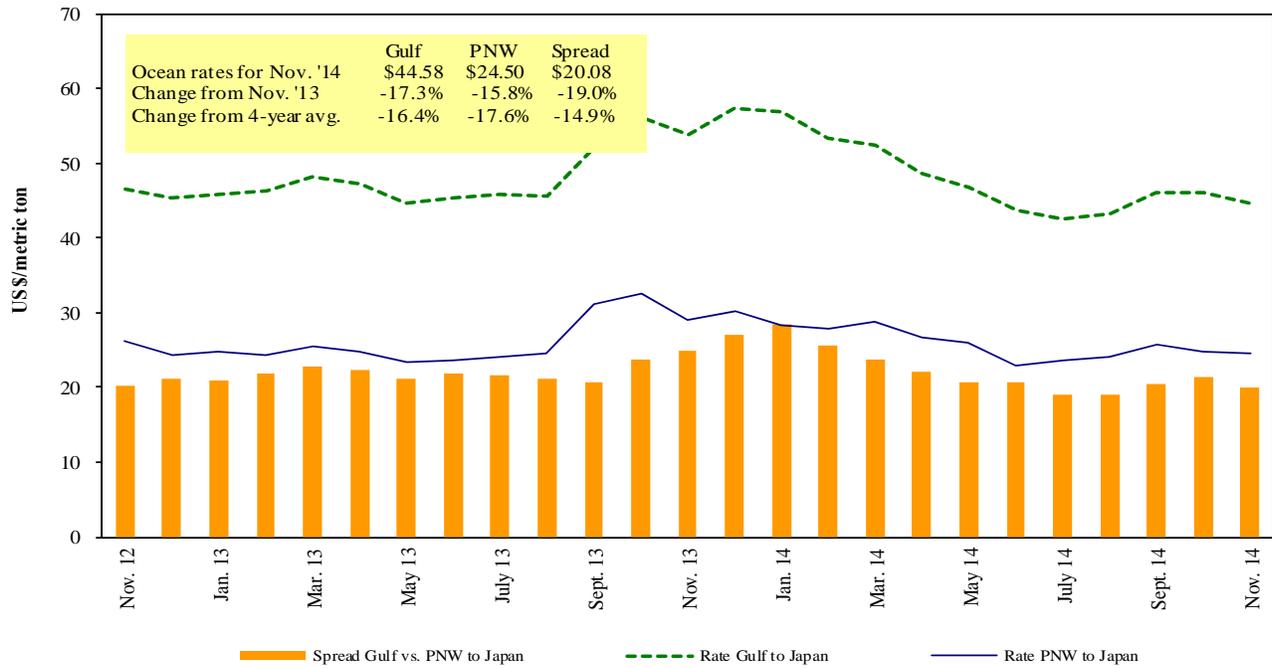


Source: Transportation & Marketing Programs/AMS/USDA

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 12/27/2014

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Kenya ¹	Sorghum	Jan 2/12	10,000	91.35
U.S. Gulf	China	Heavy Grain	Dec 15/30	5,500	40.25
U.S. Gulf	China	Heavy Grain	Dec 15/20	55,000	50.00
U.S. Gulf	China	Heavy Grain	Dec 10/17	55,000	41.75
U.S. Gulf	China	Heavy Grain	Dec 10/20	60,000	41.25
U.S. Gulf	China	Heavy Grain	Nov 25/30	60,000	43.00
U.S. Gulf	China	Heavy Grain	Nov 20/30	60,000	44.75
U.S. Gulf	China	Heavy Grain	Nov 15/25	55,000	44.25
U.S. Gulf	China	Heavy Grain	Nov 10/20	60,000	44.25
U.S. Gulf	China	Heavy Grain	Nov 5/15	60,000	45.25
U.S. Gulf	China	Heavy Grain	Nov 1/8	58,000	46.00
U.S. Gulf	Brazil	Wheat	Nov 8/14	25,000	22.00
U.S. Gulf	Djibouti ¹	Wheat/Sorghum	Nov 20/30	22,000	68.50
PNW	China	Heavy Grain	Nov 1/30	60,000	26.50
PNW	China	Grain	Oct 20/30	60,000	23.00

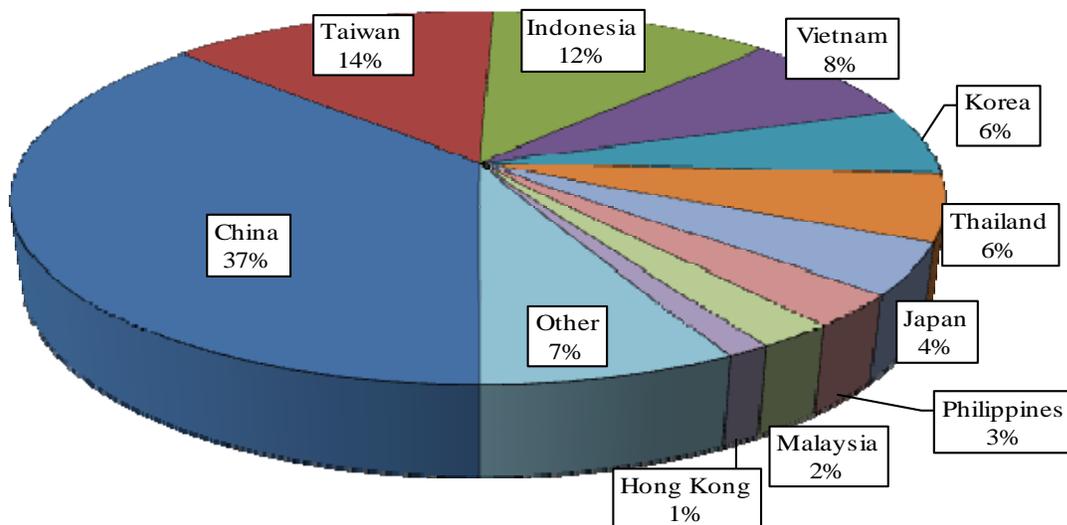
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

¹50 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)

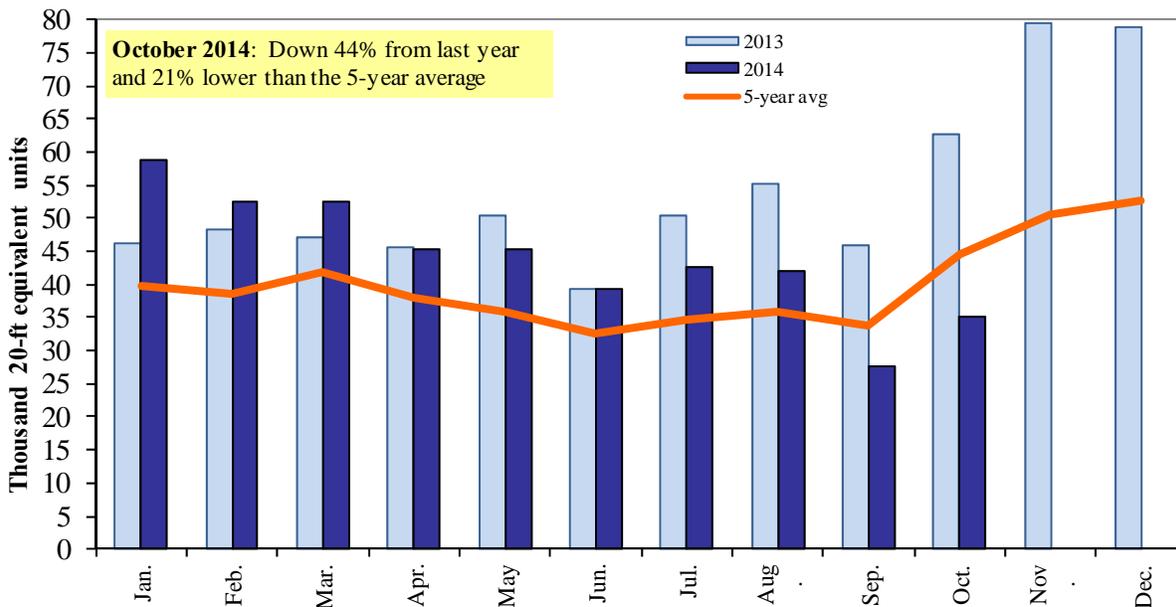
In 2013, containers were used to transport 10 percent of total U.S. waterborne grain exports, up 2 percentage points from 2012. Approximately 61 percent of U.S. waterborne grain exports in 2013 went to Asia, of which 16 percent were moved in containers. Asia is the top destination for U.S. containerized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

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



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