



Grain Transportation Report

A weekly publication of the Transportation and Marketing Programs/Transportation Services Division
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WEEKLY HIGHLIGHTS

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President's Budget Proposes Annual Fee for Inland Waterways Users

The President's budget for Fiscal Year 2014 (FY14) includes \$4.826 billion for the U.S. Army Corps of Engineers Civil Works program, a 5.5 percent decrease from the Fiscal Year 2012 enacted level. The proposal provides priority funding for the operation and maintenance of high performing projects, such as navigation on the Mississippi and Ohio Rivers and the Illinois Waterway. The FY14 budget also proposes the establishment of a new annual per-vessel fee to increase the amount paid by commercial navigation users into the Inland Waterways Trust Fund (IWTF). Navigation interest groups have suggested an increase in the tax on the fuel used by commercial waterways users as a method for increasing IWTF levels.

Total Grain Inspections Down but Corn Rebounds

For the week ending April 11, total **inspections of all major grains** (corn, wheat, and soybeans) decreased to 1.15 million metric tons (mmt), 22 percent lower than the past week and 50 percent below last year. Despite the drop in total grain inspections, corn inspections (.374 mmt) jumped 43 percent, as corn prices dropped and shipments to Latin America picked up again. Soybean inspections (.131 mmt) were down 69 percent from the previous week because of more South American soybean exports. Inspections of soybeans were also the lowest since June 16, 2011 (.127 mmt), but the slower pace of soybean shipments had been expected after a marketing year marked by a faster-than-average export pace. Wheat inspections (.640 mmt) dropped 18 percent from the past week, but continued to increase through the Pacific Northwest. Outstanding (unshipped) export sales also continued to drop for each of the three major grains.

Diesel Fuel Prices Fall for 7th Straight Week

During the week ending April 15, U.S. average **diesel fuel prices** fell 3 cents from the previous week to \$3.94 per gallon—19 cents lower than the same week last year. Diesel fuel prices have fallen 22 cents during the past 7 weeks; they fell below \$4 per gallon as of the first week in March. Lower global crude oil prices in March have put downward pressure on prices. According to the Energy Information Administration (EIA), "Recent disappointing employment, manufacturing, and service sector data in the United States has lowered expectations for economic growth and world crude oil and petroleum product prices." Additionally, EIA reported, "Projected consumption of distillate fuel, which includes diesel fuel and heating oil, (is expected to) average 3.7 million barrels per day (bbl/d) this summer, up 20,000 bbl/d (0.6 percent) from last summer. That growth is driven by increasing manufacturing output and foreign trade."

Snapshots by Sector

Rail

U.S. railroads originated 16,888 **carloads of grain** during the week ending April 6, up 10 percent from last week, down 14 percent from last year and 22 percent lower than the 3-year average.

During the week ending April 11, average April non-shuttle **secondary railcar bids/offers per car** were \$3 below tariff, unchanged from last week and \$7 higher than last year. Average shuttle bids/offers were \$220.50 below tariff, down \$9.50 from last week and \$142 higher than last year.

Barge

During the week ending April 13, **barge grain movements** totaled 337,600 tons, 17 percent higher than the previous week, but 26.8 percent lower than the same period last year.

During the week ending April 13, 216 grain barges **moved down river**, up 18.7 percent from last week; 327 grain barges were **unloaded in New Orleans**, up 5 percent from the previous week.

Ocean

During the week ending April 11, 28 **ocean-going grain vessels** were loaded in the Gulf, 10 percent less than the same period last year. Thirty-five vessels are expected to be loaded within the next 10 days, 30 percent more than the same period last year.

During the week ending April 11, the ocean **freight rate for shipping bulk grain** from the Gulf to Japan was \$47.50 per mt, unchanged from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$25 per mt, unchanged from the previous week.

Feature Article/Calendar

Transportation of Fertilizers

Fertilizer is transported in solid or liquid form from its point of origin or production location. It is often transported by river barges, rail cars, trucks, or pipelines, either as a liquid or gas. Before arriving at the farm field, a fertilizer will likely have been transported by more than one mode of transportation. This article presents data and analysis of fertilizer movements by barge and rail.

Table 1 shows fertilizer barge traffic by month and year,¹ based on the date the shipment was delivered. Over the last 10 years, April is the leading month for delivering fertilizer by barge, except in 2007 and 2008. The highest annual total during the 10 year period was 2011. The leading origin of barged fertilizers is the Baton Rouge-New Orleans area, which ships about 75 percent of all barged fertilizer to inland destinations. Fertilizers are often delivered to Baton Rouge-New Orleans from Florida or a foreign country. The leading fertilizer shipped upbound from New Orleans is urea. About 20 percent of barged fertilizers are delivered to the Upper Mississippi River (above St. Louis, MO), which is the leading destination for barged fertilizer. Fertilizers can use the same barge as downbound grain, and are often a backhaul commodity instead of sending an empty barge upbound. The second leading river area for fertilizer deliveries is the Ohio River, with about 19 percent of the deliveries. Other important delivery points are the McClellan-Kerr Arkansas River System, Illinois River, and the Lower Mississippi (Cairo, IL, to Memphis, TN).

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	10-yr avg.
Jan	0.651	0.830	0.926	0.888	1.028	0.919	0.963	0.754	0.822	1.231	0.901
Feb	0.811	0.703	0.726	0.791	0.809	0.785	0.867	0.944	0.895	0.911	0.824
Mar	0.959	0.868	1.189	1.350	1.158	1.451	1.005	0.956	1.040	1.386	1.136
Apr	1.488	1.662	1.729	1.510	1.362	1.465	1.154	1.178	1.624	1.553	1.473
May	1.217	1.119	1.152	1.395	1.191	1.472	1.333	0.900	1.124	1.337	1.224
Jun	0.886	0.784	0.819	0.969	0.806	0.911	1.039	0.841	0.907	1.189	0.915
Jul	0.692	0.802	0.747	0.766	0.672	0.816	0.997	0.734	0.714	0.897	0.784
Aug	0.714	0.714	0.766	0.771	0.590	0.858	0.989	0.750	0.893	0.998	0.804
Sep	0.973	0.955	0.930	0.702	0.796	0.918	0.782	0.779	0.888	0.931	0.865
Oct	1.111	1.351	1.146	0.761	0.846	1.231	0.948	0.739	1.381	1.389	1.090
Nov	1.042	1.359	1.101	1.099	0.913	1.061	0.719	0.987	1.349	1.280	1.091
Dec	0.848	1.031	0.817	0.816	0.717	0.952	0.523	0.867	1.258	0.937	0.877
Annual	11.392	12.176	12.050	11.816	10.887	12.838	11.319	10.429	12.896	14.040	11.984

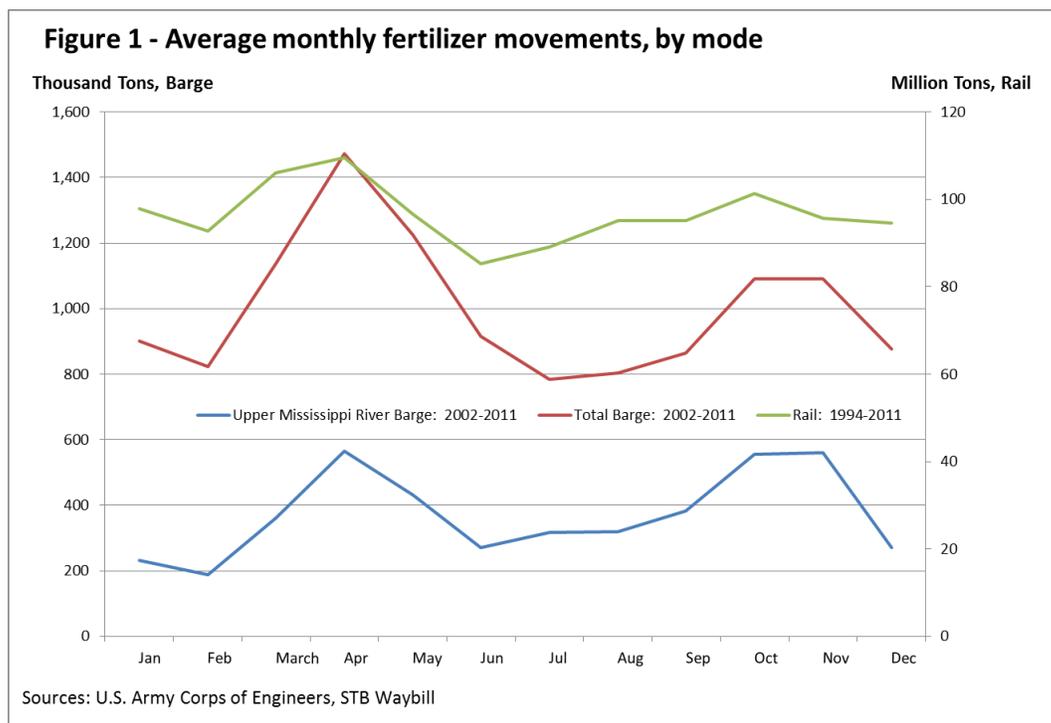
Source: Detailed Origin-Destination Waterborne Commerce Statistics, U.S. Army Corps of Engineers

Figure 1 shows monthly average tonnages for fertilizer delivered to points at and above St. Louis, MO, which includes the Upper Mississippi, Illinois, and Missouri Rivers, all barge deliveries, and all rail shipments. April average tonnages were 565 thousand tons for the month or 141 thousand tons per week. For the first two weeks of April 2013, Mississippi River Locks 27 reports an upbound total of 178 thousand tons for the week ending April 13, indicating that the barge tonnages are above pace for the spring peak demand

Barge deliveries of fertilizers are more variable than by rail, but both tend to peak in the spring and fall months. Rail delivery data is collected by origination date, while barge uses the delivered date.

¹ All fertilizer movements are derived from U.S. Army Corps of Engineers data that include various fertilizers moving on the domestic waterways. The values in Table 1 use the terminating date for the movement and thus include only data in the year freight movements terminate. This methodology is used so calendar year totals in Table 1 will match annual data published by the Corps.

From 2002 through 2011, railroads hauled an average of 60 million tons of fertilizer and fertilizer ingredients, almost five times as much as barges (Tables 1 and 2). Over the 10-year period, dry fertilizers averaged 21 percent, fertilizer ingredients averaged 54 percent, anhydrous ammonia averaged 5 percent, and liquid fertilizers averaged 20 percent of the total fertilizer hauled by rail. Rail movements of anhydrous ammonia, a toxic-by-inhalation hazardous material, have decreased to only 1.8 million tons, about one-half that of prior years.



	Dry fertilizer	Fertilizer ingredients	Anhydrous ammonia	Liquid fertilizer	Total
1994	13,581,614	39,112,768	3,909,468	12,218,032	68,821,882
1995	13,466,118	42,431,224	3,750,364	11,404,252	71,051,958
1996	13,839,418	43,162,520	4,284,492	11,311,050	72,597,480
1997	13,977,113	42,427,765	4,412,052	12,027,417	72,844,347
1998	13,631,455	38,091,013	3,920,632	12,646,399	68,289,499
1999	13,797,239	37,698,858	3,949,896	12,192,632	67,638,625
2000	13,226,556	33,949,983	3,450,536	11,871,764	62,498,839
2001	13,822,056	29,107,240	3,153,208	12,008,509	58,091,013
2002	13,718,590	32,729,081	3,052,728	12,088,707	61,589,106
2003	15,269,288	32,966,752	3,428,892	11,834,837	63,499,769
2004	14,726,991	32,525,310	3,721,588	11,271,728	62,245,617
2005	13,831,280	34,778,083	3,662,124	11,983,598	64,255,085
2006	11,516,810	32,181,962	3,835,652	12,097,754	59,632,178
2007	12,416,839	37,332,843	3,523,280	13,309,446	66,582,408
2008	10,189,737	31,267,414	2,902,380	12,834,857	57,194,388
2009	10,029,042	25,996,662	1,830,856	11,529,845	49,386,405
2010	11,426,482	31,781,420	1,992,412	12,474,311	57,674,625
2011	12,284,027	31,178,329	1,791,344	13,228,789	58,482,489
2002-11 avg	12,540,909	32,273,786	2,974,126	12,265,387	60,054,207
1994-2011 avg	13,041,703	34,928,846	3,365,106	12,129,663	63,465,317

Source: USDA analysis of Surface Transportation Board Confidential Waybill Samples

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Grain Transportation Indicators

Table 1
Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
04/17/13	265	234	202	152	212	177
04/10/13	267	234	202	158	212	177

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

Source: Transportation & Marketing Programs/AMS/USDA

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

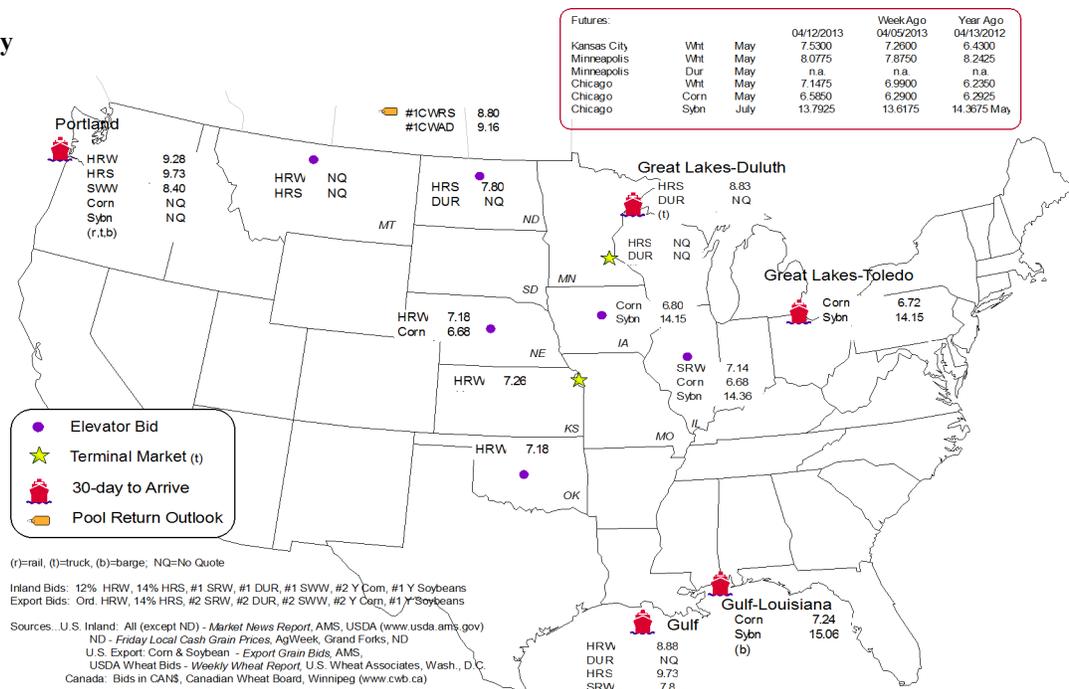
Commodity	Origin--Destination	4/12/2013	4/5/2013
Corn	IL--Gulf	-0.56	-0.42
Corn	NE--Gulf	-0.56	-0.48
Soybean	IA--Gulf	-0.91	-0.85
HRW	KS--Gulf	-1.62	-1.57
HRS	ND--Portland	-1.93	-1.93

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		Pacific		Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf				
04/10/2013 ^p	122	1,121	1,569	114		2,926	04/06/13	1,432
04/03/2013 ^r	185	1,819	2,899	124		5,027	03/30/13	1,303
2013 YTD ^r	7,889	14,438	58,190	8,103		88,620	2013 YTD	17,166
2012 YTD ^r	3,488	10,362	68,146	7,423		89,419	2012 YTD	32,321
2013 YTD as % of 2012 YTD	226	139	85	109		99	% change YTD	53
Last 4 weeks as % of 2012 ²	120	201	66	29		81	Last 4wks % 2012	53
Last 4 weeks as % of 4-year avg. ²	25	99	73	24		71	Last 4wks % 4 yr	64
Total 2012	22,604	40,780	199,419	32,762		287,462	Total 2011	97,118
Total 2011	27,358	77,515	191,187	24,088		320,148	Total 2010	90,175

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2011 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.

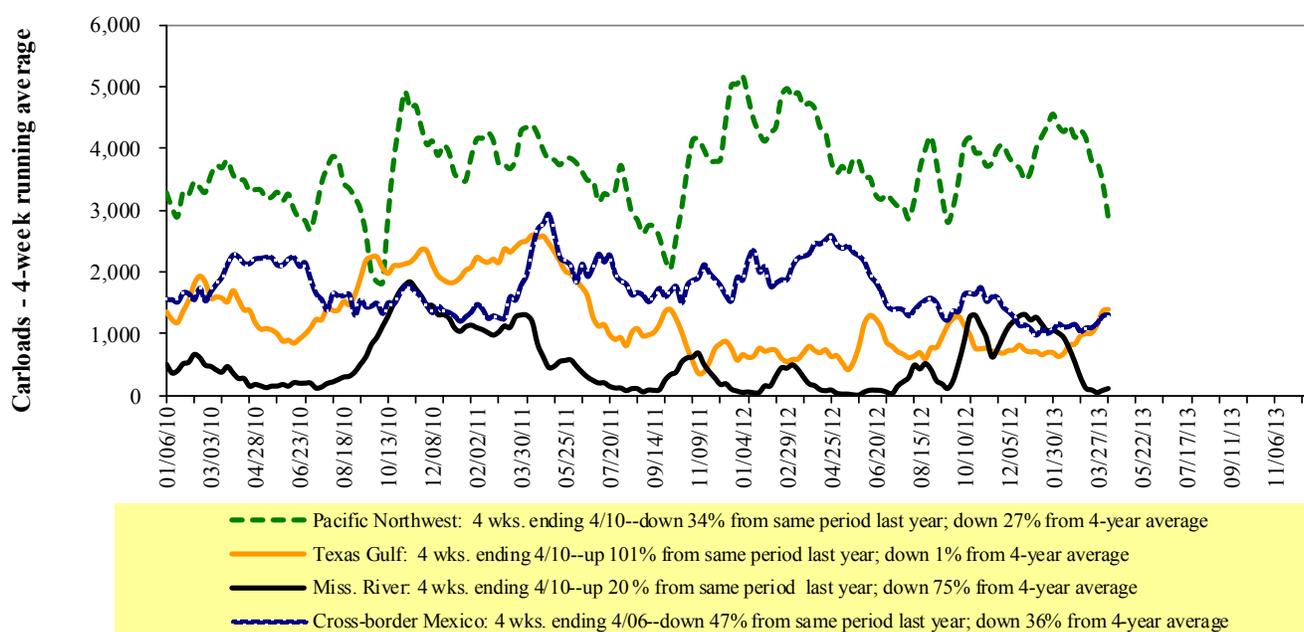
YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

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

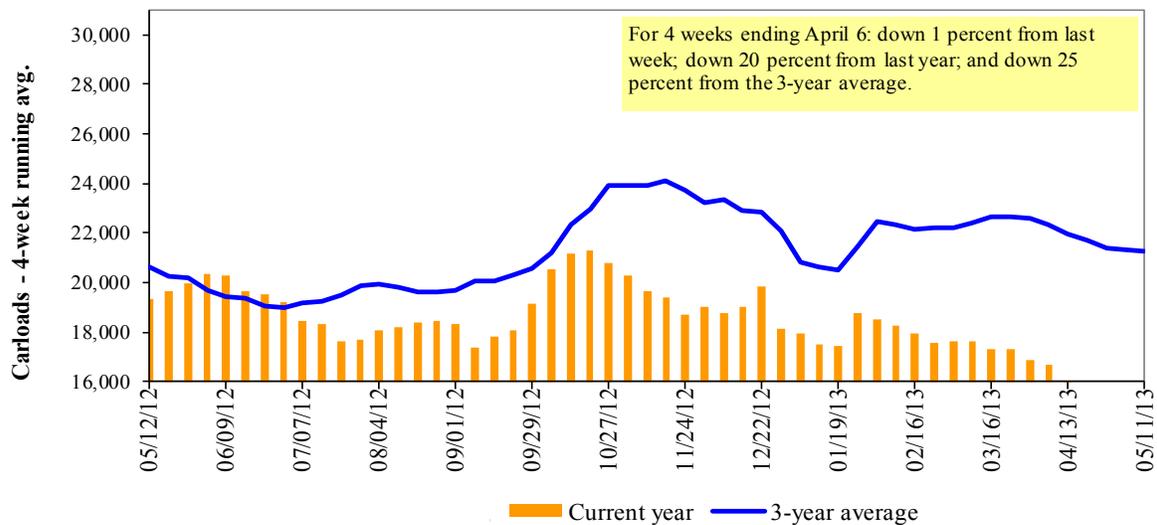
Table 4

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
04/06/13	1,887	2,286	8,575	533	3,607	16,888	3,568	6,531
This week last year	2,026	2,285	9,403	347	5,589	19,650	4,634	4,290
2013 YTD	21,477	35,291	130,027	6,616	53,384	246,795	47,498	74,500
2012 YTD	30,358	39,934	143,941	6,543	72,416	293,192	53,520	71,984
2013 YTD as % of 2012 YTD	71	88	90	101	74	84	89	103
Last 4 weeks as % of 2012	64	90	85	103	72	80	76	106
Last 4 weeks as % of 3-yr avg. ¹	64	80	80	73	69	75	72	104
Total 2012	85,384	145,336	515,638	26,936	244,077	1,017,371	204,068	266,266

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							
	Apr-13	Apr-12	May-13	May-12	Jun-13	Jun-12	Jul-13	Jul-12
BNSF ³								
COT grain units	0	0	0	no bids	no bids	0	no bids	0
COT grain single-car ⁵	0	0 . . 25	0 . . 1	0	no bids	0	no bids	0 . . 2
UP ⁴								
GCAS/Region 1	no offer	no bids	no bids	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	no offer	1	no bids	no bids	no bids	no bids	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.

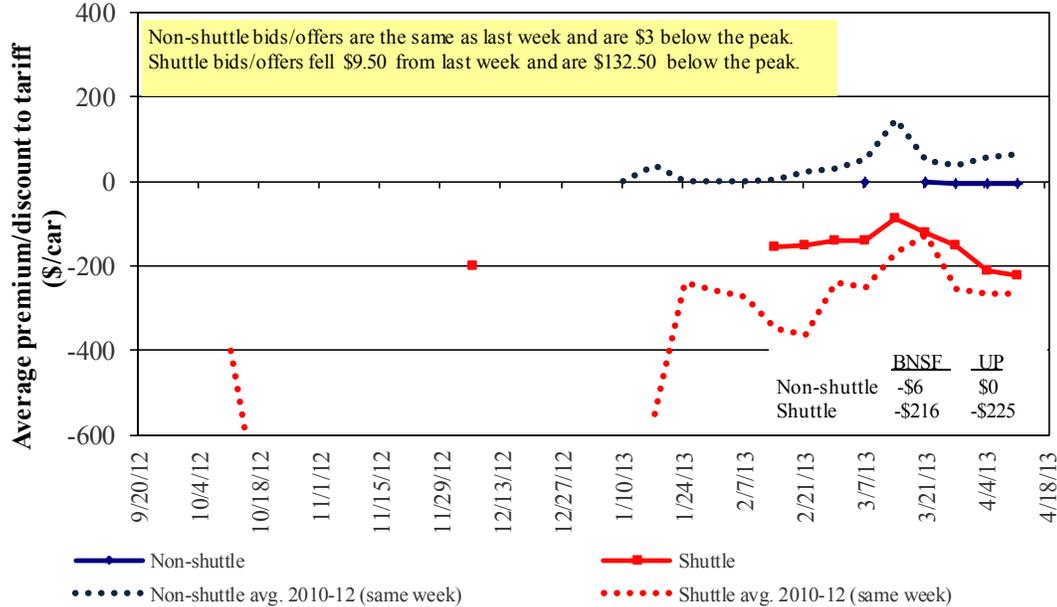
⁵Range is shown because average is not available. Not available = n/a.

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 April 2013, Secondary Market

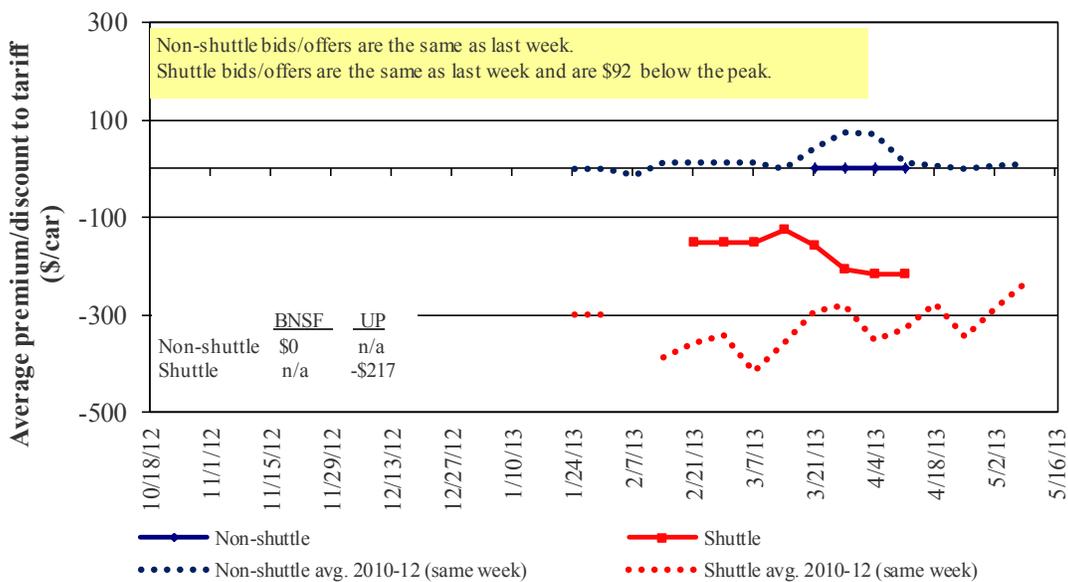


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in May 2013, Secondary Market

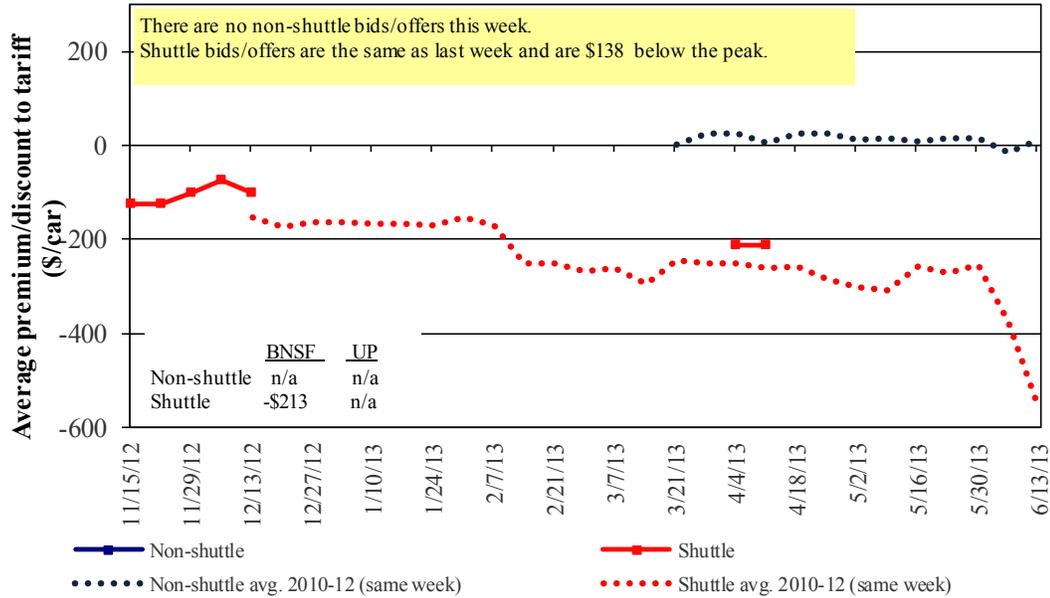


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in June 2013, 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					
	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13
Non-shuttle						
BNSF-GF	(6)	-	n/a	n/a	n/a	n/a
Change from last week	-	-	n/a	n/a	n/a	n/a
Change from same week 2011	14	n/a	n/a	n/a	n/a	n/a
UP-Pool	-	n/a	n/a	n/a	n/a	n/a
Change from last week	-	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	-	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	(216)	n/a	(213)	n/a	n/a	n/a
Change from last week	(19)	n/a	-	n/a	n/a	n/a
Change from same week 2011	259	n/a	n/a	n/a	n/a	n/a
UP-Pool	(225)	(217)	n/a	n/a	(150)	(150)
Change from last week	-	-	n/a	n/a	-	-
Change from same week 2011	25	114	n/a	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 Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

Effective date:				Fuel	Tariff plus surcharge per:		Percent
4/1/2013	Origin region*	Destination region*	Tariff rate/car	surcharge per car	metric ton	bushe ²	change Y/Y ³
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,144	\$207	\$33.28	\$0.91	5
	Grand Forks, ND	Duluth-Superior, MN	\$3,543	\$122	\$36.40	\$0.99	9
	Wichita, KS	Los Angeles, CA	\$6,026	\$627	\$66.07	\$1.80	3
	Wichita, KS	New Orleans, LA	\$3,645	\$365	\$39.82	\$1.08	5
	Sioux Falls, SD	Galveston-Houston, TX	\$5,573	\$515	\$60.46	\$1.65	1
	Northwest KS	Galveston-Houston, TX	\$3,912	\$400	\$42.82	\$1.17	4
	Amarillo, TX	Los Angeles, CA	\$4,112	\$556	\$46.36	\$1.26	4
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,110	\$412	\$34.98	\$0.95	3
	Toledo, OH	Raleigh, NC	\$4,508	\$459	\$49.32	\$1.34	3
	Des Moines, IA	Davenport, IA	\$2,006	\$87	\$20.79	\$0.57	4
	Indianapolis, IN	Atlanta, GA	\$3,920	\$345	\$42.35	\$1.15	3
	Indianapolis, IN	Knoxville, TN	\$3,354	\$221	\$35.50	\$0.97	3
	Des Moines, IA	Little Rock, AR	\$3,154	\$257	\$33.87	\$0.92	3
	Des Moines, IA	Los Angeles, CA	\$5,065	\$747	\$57.72	\$1.57	2
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,474	\$454	\$39.01	\$1.06	7
	Toledo, OH	Huntsville, AL	\$3,575	\$326	\$38.74	\$1.05	3
	Indianapolis, IN	Raleigh, NC	\$4,578	\$462	\$50.05	\$1.36	3
	Indianapolis, IN	Huntsville, AL	\$3,267	\$221	\$34.64	\$0.94	-6
	Champaign-Urbana, IL	New Orleans, LA	\$3,599	\$412	\$39.84	\$1.08	7
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,580	\$361	\$39.13	\$1.07	7
	Wichita, KS	Galveston-Houston, TX	\$3,634	\$281	\$38.88	\$1.06	12
	Chicago, IL	Albany, NY	\$3,771	\$430	\$41.72	\$1.14	4
	Grand Forks, ND	Portland, OR	\$5,061	\$623	\$56.45	\$1.54	5
	Grand Forks, ND	Galveston-Houston, TX	\$6,082	\$649	\$66.84	\$1.82	5
	Northwest KS	Portland, OR	\$4,880	\$656	\$54.97	\$1.50	4
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$759	\$55.20	\$1.50	1
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$695	\$54.17	\$1.47	1
	Champaign-Urbana, IL	New Orleans, LA	\$2,929	\$412	\$33.18	\$0.90	3
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$405	\$36.89	\$1.00	1
	Des Moines, IA	Amarillo, TX	\$3,510	\$323	\$38.06	\$1.04	3
	Minneapolis, MN	Tacoma, WA	\$4,800	\$753	\$55.14	\$1.50	1
	Council Bluffs, IA	Stockton, CA	\$4,200	\$779	\$49.44	\$1.35	2
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,320	\$695	\$59.73	\$1.63	6
	Minneapolis, MN	Portland, OR	\$5,330	\$759	\$60.47	\$1.65	7
	Fargo, ND	Tacoma, WA	\$5,230	\$618	\$58.07	\$1.58	7
	Council Bluffs, IA	New Orleans, LA	\$3,950	\$476	\$43.95	\$1.20	7
	Toledo, OH	Huntsville, AL	\$2,750	\$326	\$30.55	\$0.83	3
	Grand Island, NE	Portland, OR	\$5,195	\$671	\$58.25	\$1.59	2

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: 4/1/2013

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	\$6,262	\$659	\$70.72	\$1.92	-17
	OK	Cautitlan, EM	\$6,552	\$801	\$75.13	\$2.04	-1
	KS	Guadalajara, JA	\$7,444	\$774	\$83.97	\$2.28	-1
	TX	Salinas Victoria, NL	\$3,553	\$302	\$39.39	\$1.07	-3
Corn	IA	Guadalajara, JA	\$7,699	\$910	\$87.96	\$2.23	0
	SD	Celaya, GJ ⁵	\$7,356	\$863	\$83.98	\$2.13	n/a
	NE	Queretaro, QA	\$7,153	\$808	\$81.35	\$2.06	1
	SD	Salinas Victoria, NL	\$5,700	\$656	\$64.94	\$1.65	2
	MO	Tlalhepantla, EM	\$6,592	\$785	\$75.37	\$1.91	5
	SD	Torreon, CU	\$6,522	\$722	\$74.02	\$1.88	1
Soybeans	MO	Bojay (Tula), HG	\$7,580	\$768	\$85.29	\$2.32	7
	NE	Guadalajara, JA	\$8,134	\$878	\$92.08	\$2.50	2
	IA	El Castillo, JA	\$8,555	\$857	\$96.17	\$2.61	4
	KS	Torreon, CU	\$6,651	\$544	\$73.52	\$2.00	2
Sorghum	TX	Guadalajara, JA	\$6,464	\$561	\$71.78	\$1.82	-2
	NE	Celaya, GJ ⁵	\$6,997	\$783	\$79.49	\$2.02	n/a
	KS	Queretaro, QA	\$6,815	\$492	\$74.66	\$1.89	5
	NE	Salinas Victoria, NL	\$5,438	\$576	\$61.44	\$1.56	6
	NE	Torreon, CU	\$6,153	\$643	\$69.44	\$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

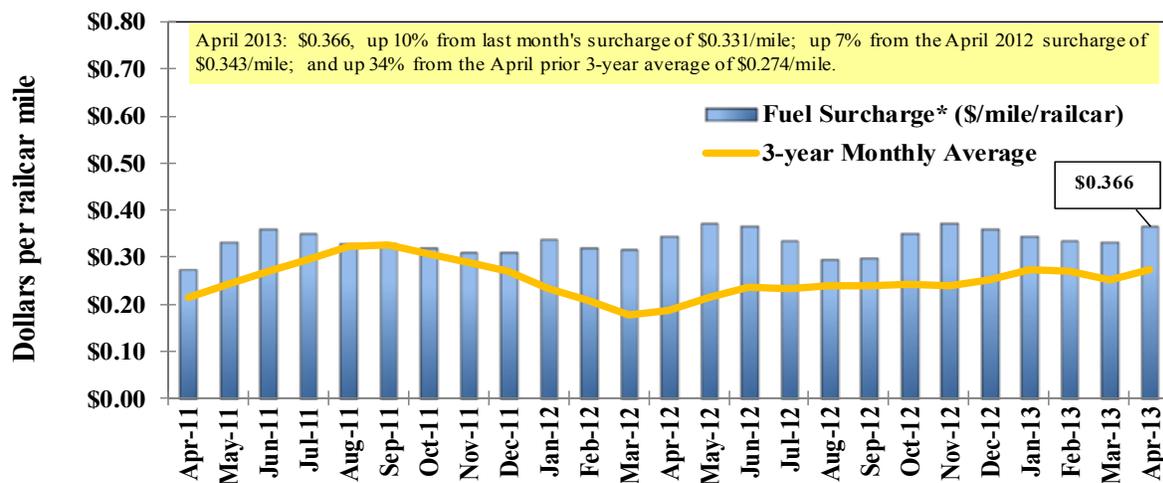
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

⁵Beginning 11/1/12, Celaya, GJ, replaced Penjamo, GJ, as the destination.

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.

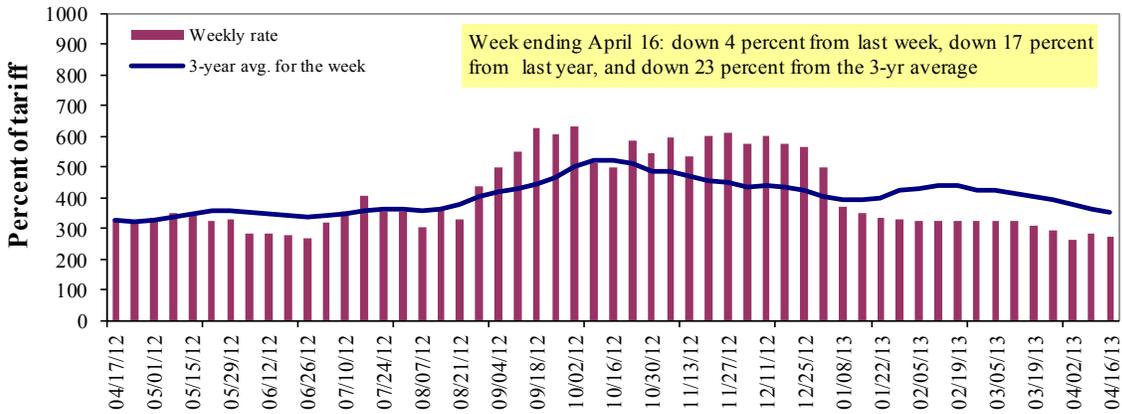
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

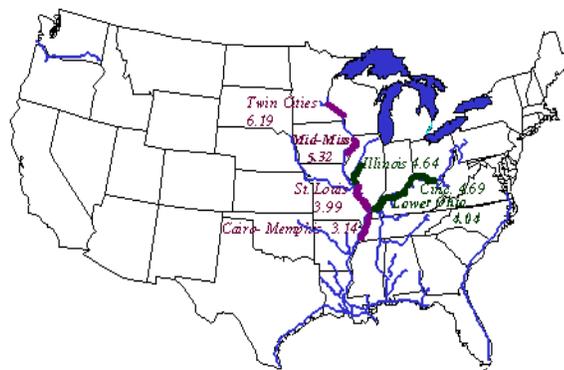
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid- Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo- Memphis
Rate¹	4/16/2013	392	312	273	225	197	197	182
	4/9/2013	355	293	285	228	198	198	180
\$/ton	4/16/2013	24.26	16.60	12.67	8.98	9.24	7.96	5.71
	4/9/2013	21.97	15.59	13.22	9.10	9.29	8.00	5.65
Current week % change from the same week:								
	Last year	-7	-11	-17	-5	-31	-31	-12
	3-year avg. ²	-7	10	-23	-13	-39	-39	-22
Rate¹	May	375	292	272	223	197	197	180
	July	370	298	273	232	205	205	183

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; - closed for winter or no rates

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9
Benchmark tariff rates



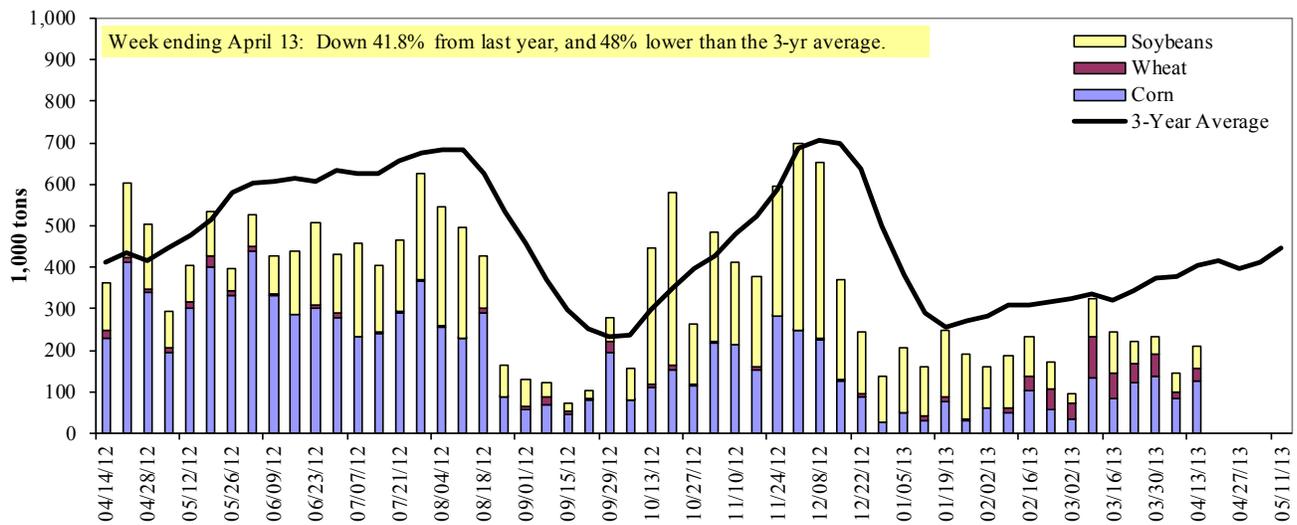
Calculating barge rate per ton:

$(\text{Index} * 1976 \text{ tariff benchmark rate per ton}) / 100$

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

Figure 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 4/13/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	19	2	15	0	36
Winfield, MO (L25)	70	3	20	0	93
Alton, IL (L26)	127	30	45	0	202
Granite City, IL (L27)	127	30	53	0	210
Illinois River (L8)	54	18	22	0	93
Ohio River (L52)	44	21	29	0	94
Arkansas River (L1)	0	34	0	0	34
Weekly total - 2013	171	85	82	0	338
Weekly total - 2012	245	54	156	7	461
2013 YTD ¹	1,872	1,271	3,083	85	6,311
2012 YTD	5,230	505	3,474	102	9,310
2013 as % of 2012 YTD	36	252	89	83	68
Last 4 weeks as % of 2012 ²	39	41	44	79	51
Total 2012	14,837	1,794	12,663	229	29,523

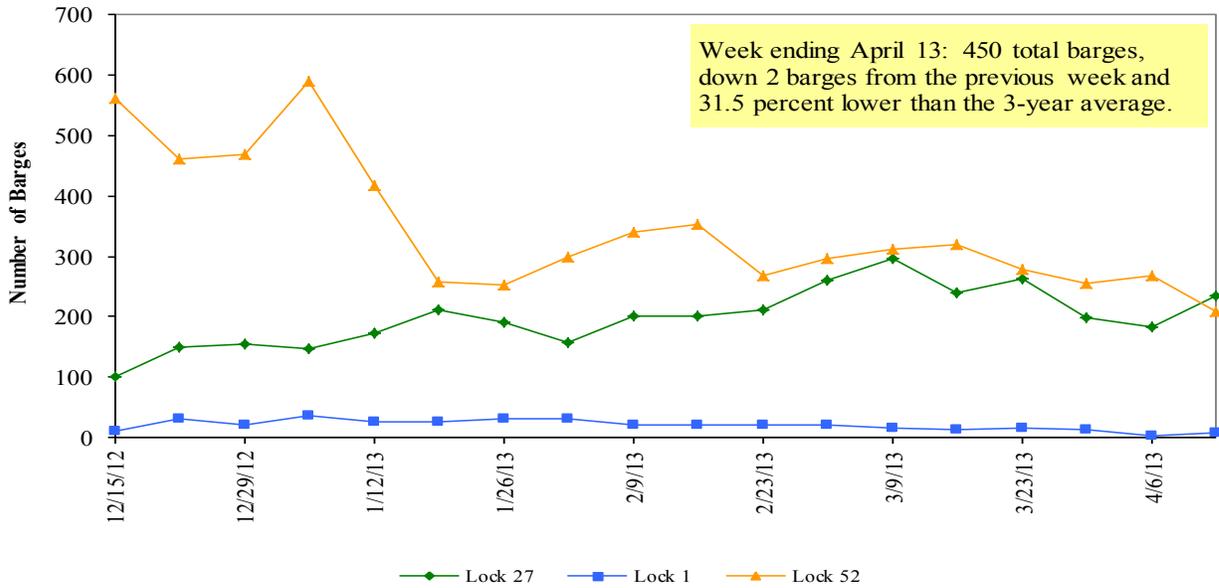
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2012.

Note: Total may not add exactly, due to rounding

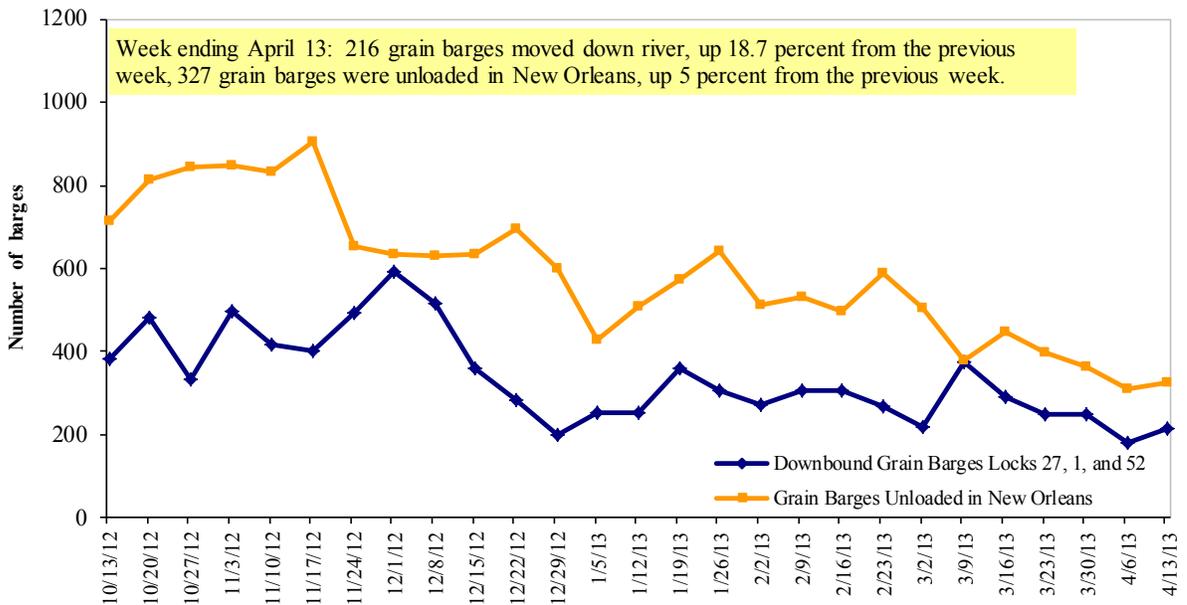
Source: U.S. Army Corps of Engineers

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



Source: U.S. Army Corps of Engineers

Figure 12
Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices¹, Week Ending 4/15/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.977	-0.032	-0.204
	New England	4.105	-0.029	-0.164
	Central Atlantic	4.032	-0.030	-0.248
	Lower Atlantic	3.911	-0.035	-0.180
II	Midwest ²	3.923	-0.033	-0.098
III	Gulf Coast ³	3.852	-0.036	-0.186
IV	Rocky Mountain	3.882	-0.017	-0.247
V	West Coast	4.066	-0.051	-0.323
	West Coast less California	3.970	-0.053	-0.386
	California	4.147	-0.049	-0.271
Total	U.S.	3.942	-0.035	-0.185

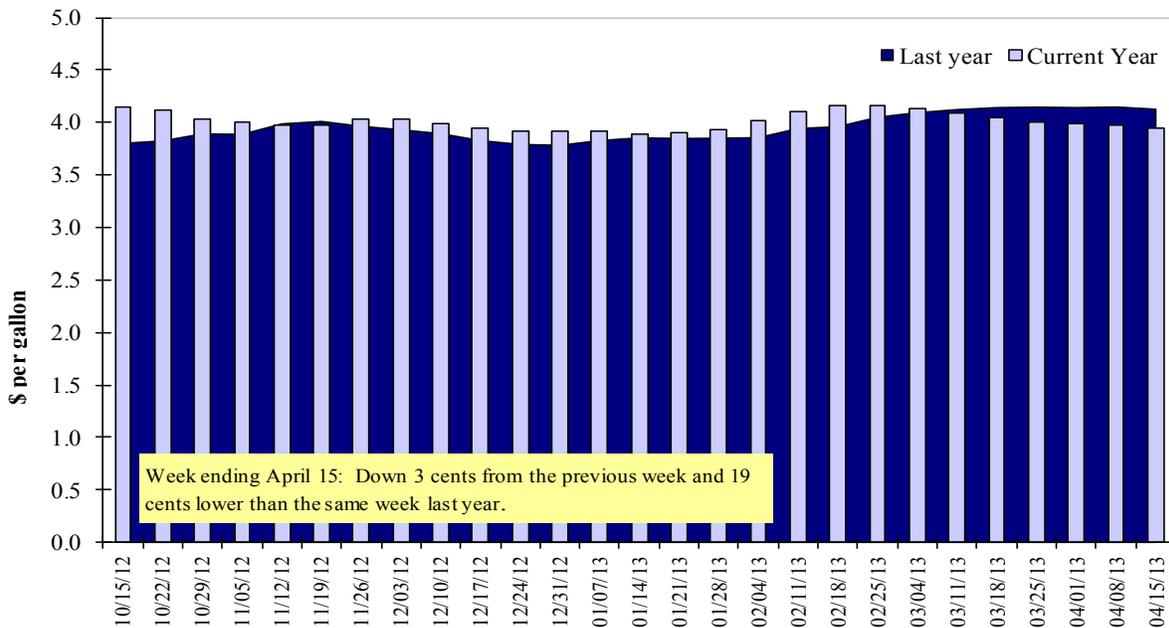
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances¹									
4/4/2013	1,810	1,021	1,026	572	68	4,497	4,211	2,796	11,504
This week year ago	1,220	858	1,093	1,263	56	4,490	10,365	4,282	19,137
Cumulative exports-marketing year²									
2012/13 YTD	7,891	4,112	4,825	3,971	401	21,200	11,494	33,533	66,227
2011/12 YTD	8,369	3,093	5,390	4,539	392	21,783	24,660	27,899	74,342
YTD 2012/13 as % of 2011/12	94	133	90	87	102	97	47	120	89
Last 4 wks as % of same period 2011/12	157	141	108	53	156	112	43	75	66
2011/12 Total	9,904	4,319	6,312	5,601	491	26,627	37,900	36,727	101,254
2010/11 Total	15,837	2,828	8,623	4,717	979	32,984	44,569	39,753	117,306

¹ Current unshipped export sales to date

² Shipped export sales to date; new marketing year begins 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 04/04/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	5,444	9,503	(43)	12,367
Mexico	3,702	8,925	(59)	9,617
China	2,474	4,257	(42)	5,414
Korea	359	3,540	(90)	3,639
Venezuela	538	808	(33)	1,332
Top 5 Importers	12,516	27,032	(54)	32,369
Total US corn export sales	15,706	35,025	(55)	39,180
% of Projected	77%	89%		
Change from prior week	185	959		
Top 5 importers' share of U.S. corn export sales	80%	77%		83%
USDA forecast, April 2013	20,320	39,180	(48)	
Corn Use for Ethanol USDA forecast, Ethanol April 2013	115,570	127,000	(9)	

(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 (Carry-over plus Accumulated Exports)

Table 14

Top 5 Importers¹ of U.S. Soybeans

Week Ending 04/04/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	22,288	21,012	6	24,602
Mexico	2,177	2,450	(11)	3,180
Japan	1,518	1,500	1	1,891
Indonesia	1,242	1,294	(4)	1,741
Egypt	677	810	(16)	1,292
Top 5 importers	27,902	27,066	3	32,706
Total US soybean export sales	36,329	32,180	13	37,060
% of Projected	99%	87%		
Change from prior week	265	460		
Top 5 importers' share of U.S. soybean export sales	77%	84%		
USDA forecast, April 2013	36,740	37,060	(1)	

(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 04/04/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	3,483	3,527	(13)	3,512
Mexico	2,760	3,395	(19)	3,496
Nigeria	2,857	3,097	(8)	3,248
Philippines	1,871	1,976	(5)	2,039
Korea	1,375	1,919	(28)	1,983
Egypt	1,487	751	98	950
Taiwan	988	912	8	888
Indonesia	435	761	(43)	830
Venezuela	623	648	(4)	594
Iraq	209	572	(63)	572
Top 10 importers	16,089	17,558	(8)	18,111
Total US wheat export sales	25,697	26,274	(2)	28,560
% of Projected	92%	92%		
Change from prior week	264	452		
Top 10 importers' share of U.S. wheat export sales	63%	67%		63%
USDA forecast, April 2013	27,900	28,560	(2)	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/>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 04/11/13	Previous Week ¹	Current Week as % of Previous	2013 YTD ¹	2012 YTD ¹	2013 YTD as % of 2012 YTD	Last 4-weeks as % of		Total ¹ 2012
							2012	3-yr. avg.	
Pacific Northwest									
Wheat	342	262	130	3,700	3,789	98	125	117	12,625
Corn	35	54	65	1,194	1,981	60	36	36	5,512
Soybeans	0	193	0	3,551	3,744	95	58	68	10,347
Total	377	510	74	8,445	9,515	89	74	76	28,484
Mississippi Gulf									
Wheat	93	234	40	2,619	1,826	143	115	139	5,462
Corn	266	168	158	3,083	6,810	45	64	48	18,068
Soybeans	48	164	30	6,440	7,539	85	45	47	24,684
Total	408	567	72	12,142	16,175	75	67	60	48,215
Texas Gulf									
Wheat	146	221	66	1,870	1,418	132	191	85	5,912
Corn	0	0	n/a	42	207	21	2	2	336
Soybeans	0	0	n/a	122	0	n/a	n/a	0	626
Total	146	221	66	2,034	1,625	125	144	73	6,874
Interior									
Wheat	5	20	27	258	376	69	64	51	1,218
Corn	72	40	182	770	2,540	30	130	38	6,115
Soybeans	70	65	107	1,297	1,344	97	50	90	4,204
Total	148	125	118	2,326	4,260	55	32	55	11,538
Great Lakes									
Wheat	53	37	144	98	19	506	464	105	481
Corn	0	0	n/a	0	14	0	n/a	0	56
Soybeans	0	0	n/a	4	2	154	47	142	713
Total	53	37	144	102	36	282	443	105	1,250
Atlantic									
Wheat	0	1	10	297	2	n/a	n/a	31	341
Corn	0	0	n/a	2	58	3	0	0	143
Soybeans	13	6	203	632	411	154	51	66	1,460
Total	13	8	170	931	471	198	64	47	1,944
U.S. total from ports²									
Wheat	640	776	82	8,842	7,431	119	130	107	26,040
Corn	374	262	143	5,092	11,610	44	50	42	30,230
Soybeans	131	429	31	12,046	13,041	92	55	61	42,035
Total	1,145	1,467	78	25,980	32,082	81	72	66	98,305

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

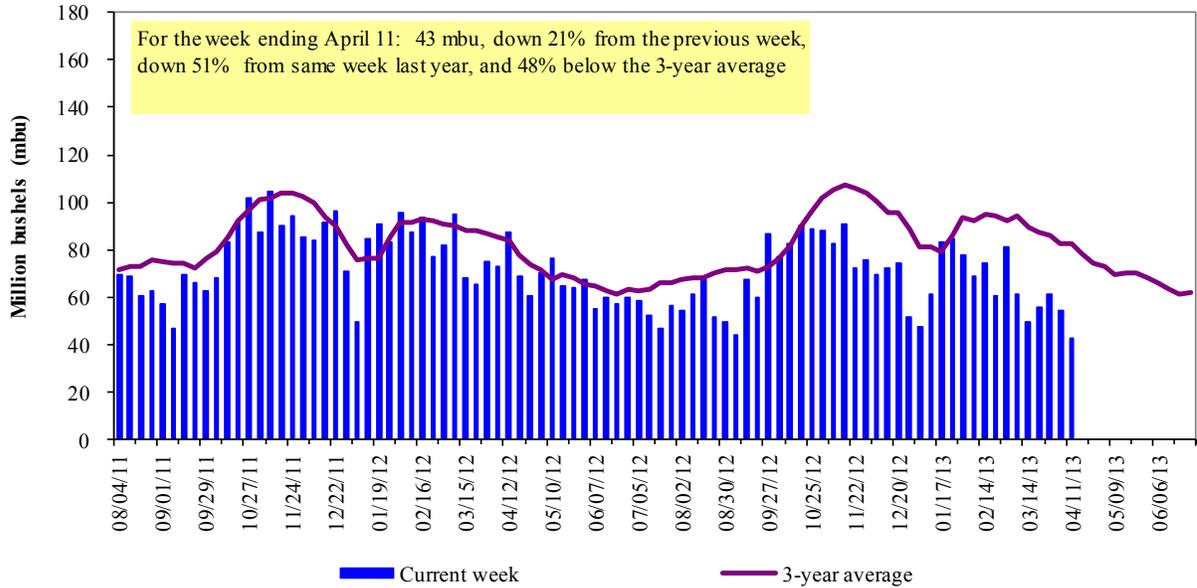
² Total includes only port regions shown above; Interior land-based shipments now included.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 56 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2012.

Figure 14

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

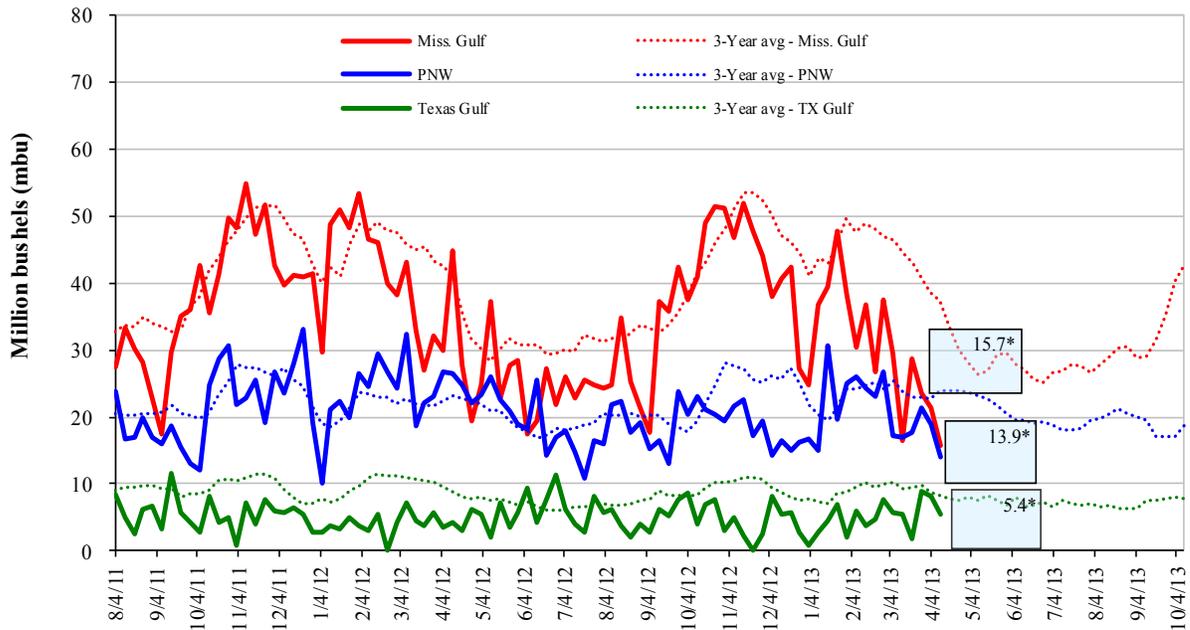


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

April 11 % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	down 26	down 34	down 28	down 26
Last year (same week)	down 65	up 25	down 57	down 48
3-yr avg (4-wk mov. avg)	down 58	down 36	down 54	down 45

Ocean Transportation

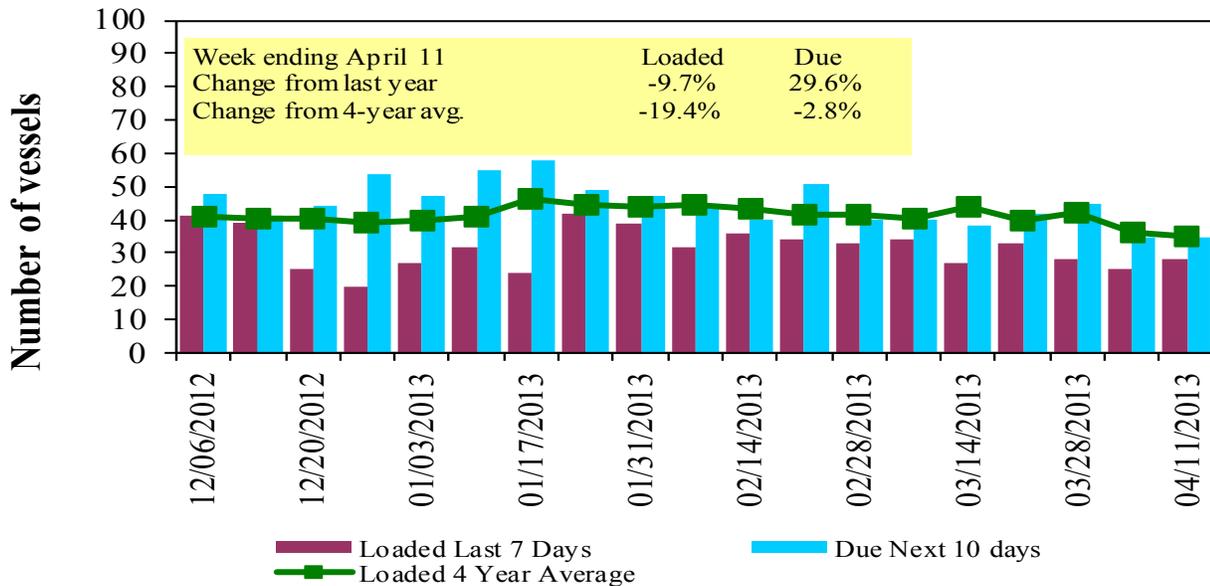
Table 17

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

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
4/11/2013	19	28	35	10	n/a
4/4/2013	21	25	35	7	n/a
2012 range	(13..50)	(13..46)	(27..78)	(4..20)	n/a
2012 avg.	28	33	46	11	n/a

Source: Transportation & Marketing Programs/AMS/USDA

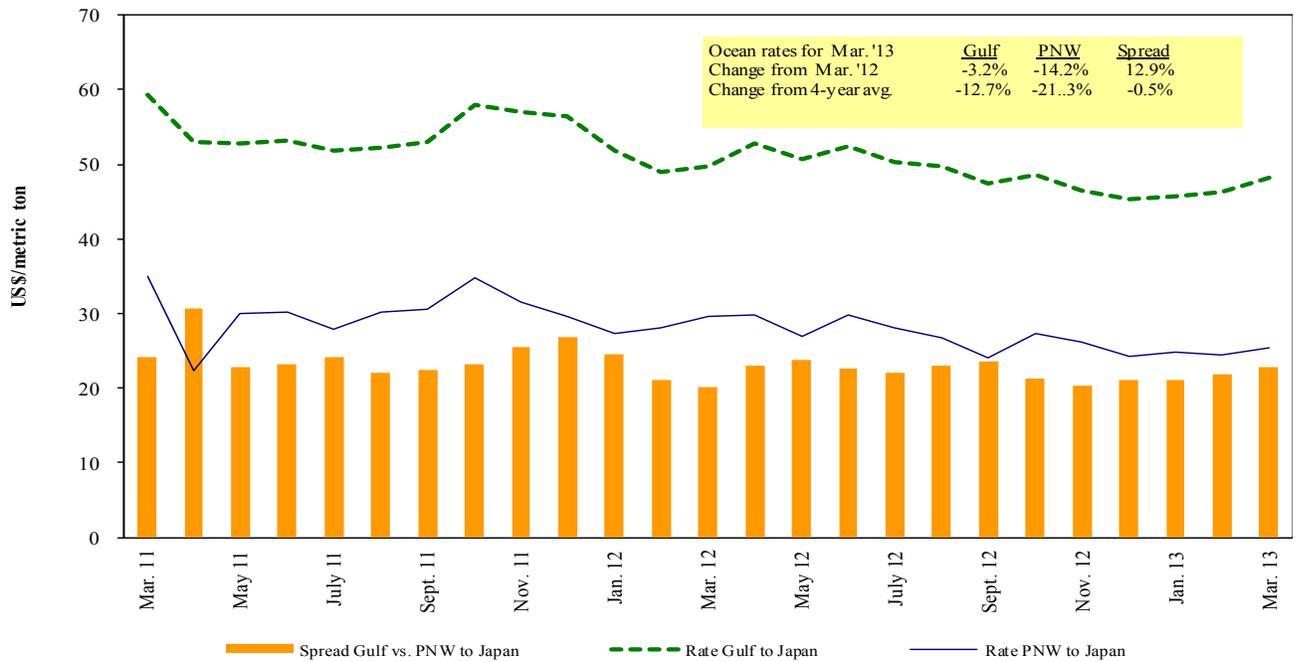
Figure 16
U.S. Gulf^d Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18
Ocean Freight Rates For Selected Shipments, Week Ending 04/13/2013

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 25/Feb 5	55,000	43.05
U.S. Gulf	China	Heavy Grain	Jan 25/Feb5	55,000	43.05
U.S. Gulf	China	Heavy Grain	Feb 1/5	54,000	20.50
U.S. Gulf	Egypt Med	Heavy Grain	Feb 20/Mar 5	60,000	23.25
U.S. Gulf	Ethiopia ¹	Wheat	Mar 11/21	21,000	44.62
PNW	China	Heavy Grain	Feb 1/5	54,000	20.50
Australia	Italy	Heavy Grain	Feb 10/25	58,000	27.00
Brazil	China	Heavy Grain	May 1/10	60,000	40.50
Brazil	China	Heavy Grain	Apr 10/15	60,000	43.00
Brazil	China	Heavy Grain	March 5/25	60,000	40.25
Brazil	China	Heavy Grain	Mar 1/10	60,000	38.25
Brazil	China	Heavy Grain	Mar 3/12	60,000	35.00
Brazi	China	Heavy Grain	May 1/5	60,000	35.35
Brazil	China	Heavy Grain	Feb 8/23	60,000	35.50
France	Algeria	Wheat	Apr 15/25	30,000	18.75
France	Algeria	Wheat	Mar 20/30	30,000	19.75
River Plate	Egypt Med	Heavy Grain	Apr 8/12	60,000	32.00

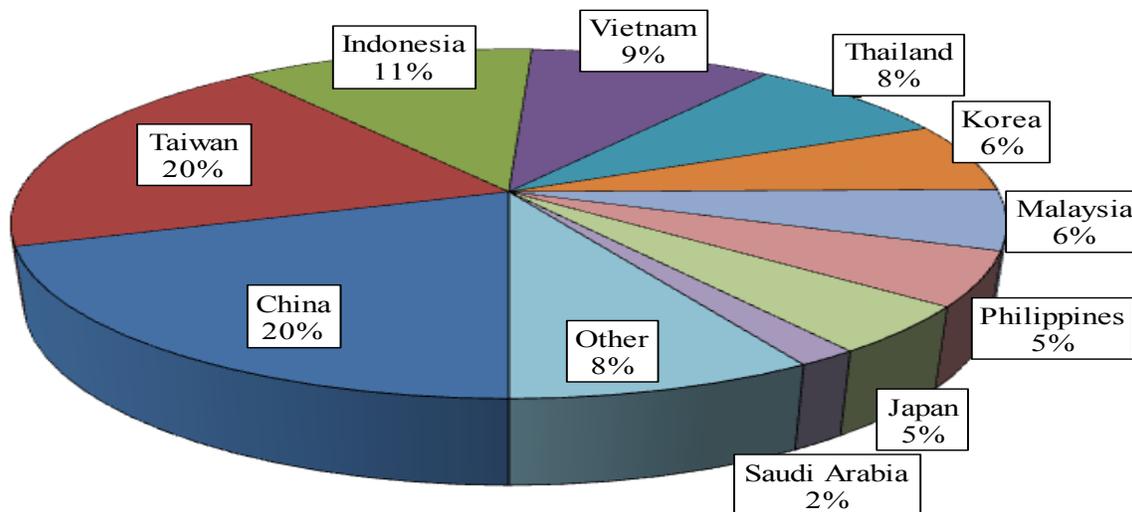
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

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 2012, containers were used to transport 8 percent of total U.S. waterborne grain exports, up 1 percentage point from 2011. Approximately 66 percent of U.S. waterborne grain exports in 2012 went to Asia, of which 11 percent were moved in containers. Asia is the top destination for U.S. containerized grain exports—96 percent in 2012.

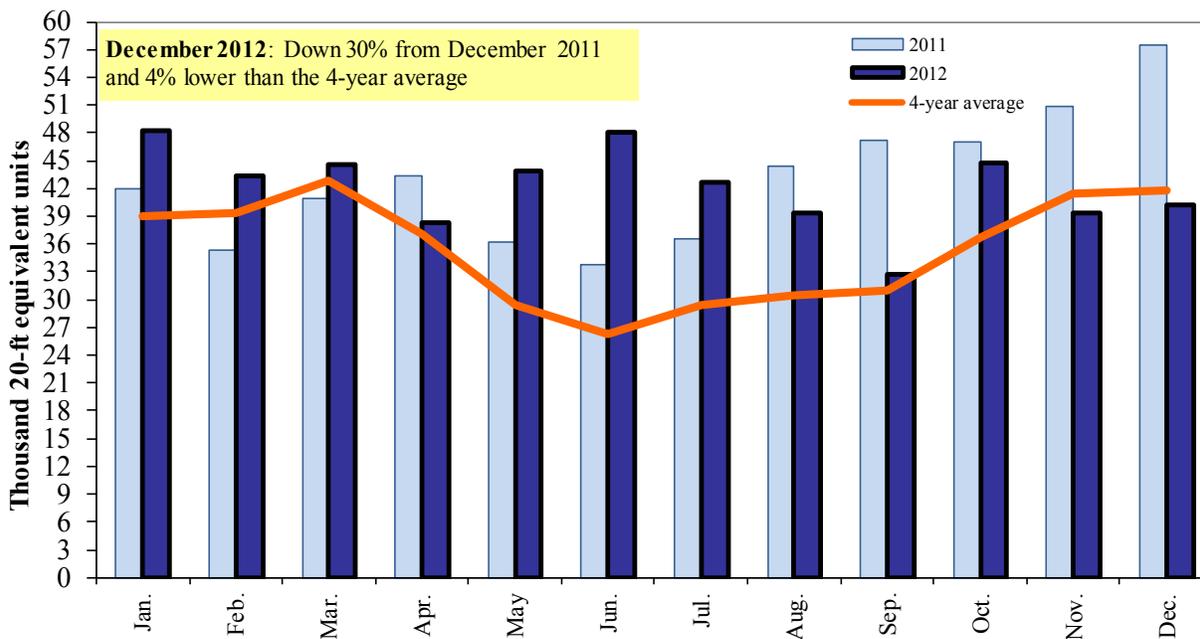
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, December 2012



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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