



Grain Transportation Report

A weekly publication of the Transportation and Marketing Programs/Transportation Services Division
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April 25, 2013

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WEEKLY HIGHLIGHTS

Upper Mississippi River Flood Update

Last week's torrential rains that soaked a wide area of the upper Midwest caused major flooding along key barge and rail corridors. The additional rainfall from this week's storm system in parts of Missouri, Iowa, Michigan, Illinois, and Indiana is expected to slow the recession of river levels and cause minor rises at some locations. Most of the rivers in the affected areas are cresting on Thursday, to record levels along the Illinois River. Mississippi River Locks and Dams 16 to 25 and three of the Illinois River locks remain closed to navigation. Subsequent to flooding, soybean basis along the river weakened. On Tuesday, the soybean basis in St. Louis strengthened as navigation near Vicksburg, MS, returned to normal. Many State and local roads remain closed in the flooded area, limiting grain truck movements. BNSF mainline track washouts near Chillicothe, IL, (approximately 100 miles west of Chicago) are now repaired. These washouts affected trains destined for Chicago. BNSF Chicago hubs are processing inbound trains and expect to be back to normal within 24 to 36 hours.

States of Emergency Declarations due to Flooding

To provide vital supplies and transportation services to a disaster area in the United States, emergency declarations may be issued by the President, Governors of States, or the U.S. Department of Transportation's Federal Motor Carrier Safety Administration. These declarations trigger the temporary suspension of certain Federal safety regulations—including Hours of Service—for trucking companies and drivers engaged in specific aspects of the emergency relief effort. Iowa Governor Terry E. Branstad issued proclamations on April 19 and April 23 activating the Iowa Individual Assistance Program for 8 counties. Illinois Governor Pat Quinn declared 44 counties state disaster areas and Missouri Governor Jay Nixon declared a state of emergency on April 19.

States Reminded About Statutory Agricultural Exemptions

The "Moving Ahead for Progress in the 21st Century Act" (MAP-21) includes statutory exemptions to the Federal Motor Carrier Safety Regulations (FMCSRs) for the "transportation of agricultural commodities and farm supplies" and for "covered farm vehicles" and their drivers. On October 1, 2012, the effective date of MAP-21, the Federal Motor Carrier Safety Administration (FMCSA) published a notice in the Federal Register informing the enforcement community and industry about these exemptions. The final rule, which formally revises the FMCSRs, was effective upon publication in the Federal Register on March 14. Although prior statutory exemptions involving agriculture are unchanged, some of them overlap with MAP-21 provisions. In these cases, regulated entities will be able to choose the exemption, or set of exemptions, under which to operate. They must, however, comply fully with the terms of each exemption they claim. [FMCSA has provided questions and answers related to the final rule.](#)

Total Inspections Lowest Since January 2009; Weekly Wheat Inspections Up

For the week ending April 18, **total inspections** of all major grains (corn, wheat, and soybeans) reached 1.12 million metric tons (mmt), down 5 percent from the past week and 39 percent below last year at this time. Inspections were also the lowest since January 1, 2009 (1.06 mmt). Despite the drop in total grain inspections, Mississippi Gulf grain inspections (.534 mmt) increased 17 percent as wheat shipments jumped 115 percent from the past week. Shipments of wheat from the Mississippi Gulf increased to African and Caribbean destinations. Wheat inspections overall were up 6 percent from the previous week, but corn inspections dropped 15 percent and soybeans decreased 21 percent as shipments to Asia receded. Current outstanding sales of corn and soybeans, however, increased, due in part to lower prices. Export sales of corn and soybeans had been falling since late February.

Snapshots by Sector

Rail

U.S. railroads originated 17,150 **carloads of grain** during the week ending April 13, up 2 percent from last week, down 12 percent from last year, and 19 percent lower than the 3-year average.

During the week ending April 18, average May non-shuttle **secondary railcar bids/offers per car** were at tariff, unchanged from last week. Average shuttle bids/offers were \$212.50 below tariff, up \$4.50 from last week, and \$34.50 higher than last year.

Barge

During the week ending April 20, **barge grain movements** totaled 237,799 tons, 29.6 percent lower than the previous week and 65.4 percent lower than the same period last year.

During the week ending April 20, 178 grain barges **moved down river**, down 17.6 percent from last week; 378 grain barges were **unloaded in New Orleans**, up 15.6 percent from the previous week.

Ocean

During the week ending April 18, 29 **ocean-going grain vessels** were loaded in the Gulf, 21 percent more than the same period last year. Thirty-one vessels are expected to be loaded within the next 10 days, 3 percent less than the same period last year.

During the week ending April 19, 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.

Fuel

During the week ending April 22, U.S. average **diesel fuel prices** were down 6 cents from the previous week to \$3.89 per gallon—20 cents lower than the same week last year.

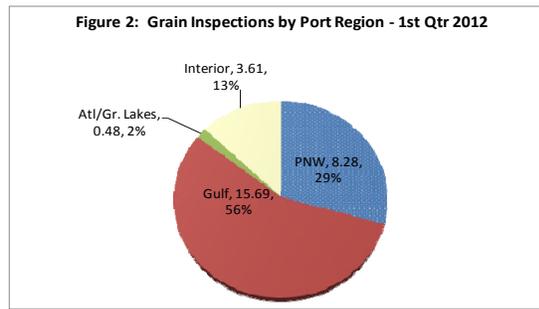
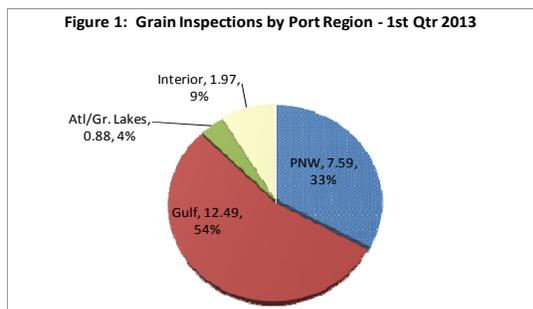
Feature Article/Calendar

First Quarter Grain Export Inspections Lower Than Last Year

First quarter 2013 grain (corn, wheat, and soybeans) inspected for export from all U.S. ports totaled 22.9 million metric tons (mmt), according to the Grain Inspection, Packers and Stockyards Administration (GIPSA). Inspections were down 19 percent from the first quarter of last year and 25 percent below the 5-year average. Inspections of wheat increased as demand from Asia rose, but corn inspections dropped notably as stocks became tighter due to the drought last year and increased global competition. Soybean inspections decreased 10 percent from last year as U.S. prices continued to increase while facing stiff competition from South America's record crop. According to GIPSA, the Gulf's share of total grain exports decreased from last year, but the Pacific Northwest (PNW) share increased (Figures 1, 2).

Gulf Inspections

First-quarter grain inspections at all Gulf ports reached 12.5 mmt, down 20 percent from last year and 34 percent below the 5-year average (see Figure 1). The Gulf's share of total first quarter grain inspections also continued to decline, accounting for 54 percent of total grain inspected for the quarter compared to 56 percent last year (Figures 1, 2). Although rail deliveries of grain to port were up 30 percent in the first quarter, the increase was not enough to offset the drop in barge movements of grain. First quarter 2013 barge movements on the Mississippi River (Lock 27) dropped 37 percent, mostly due to lower export demand. While low water levels in January and February threatened to stop barge traffic, timely rains and rock removal operations allowed barge traffic to continue, but at a reduced level (see *GTR dated 3/28/13*).



PNW Inspections

First quarter PNW grain inspections, at 7.6 mmt, decreased 8 percent from last year and were 6 percent below the 5-year average. According to GIPSA, the PNW's share of total first quarter grain inspections was 33 percent, compared to 29 percent for the same period last year (Figures 1, 2).

Atlantic and Great Lakes Inspections

First quarter Atlantic and Great Lakes grain inspections increased 86 percent from last year to 0.884 mmt because of more soybean and wheat shipments through the region. Inspections of grain in the Atlantic and Great Lakes were the highest since 2001 (0.908 mmt). Wheat inspections jumped considerably as shipments increased to Africa and Latin America. Soybean inspections increased as shipments to Asia rose.

Interior Inspections

First quarter Interior (land-based) inspections of grain reached 2 mmt, down 46 percent from last year and 33 percent below the 5-year average. The large drop in Interior grain inspections was caused by a 72-percent decrease in corn inspections. Total corn inspected for export from the Interior for shipment to Mexico decreased 82 percent from the previous year. Interior soybean inspections (1.1 mmt) increased slightly from last year. Wheat inspections (0.199 mmt) in the region, however, dropped 25 percent from last year as shipments to Mexico declined. Soybean inspections in the Interior were unchanged from last year.

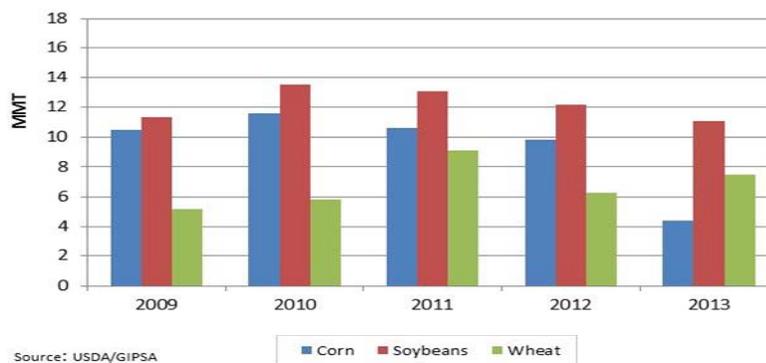
Wheat Inspections

First quarter wheat inspections reached 7.5 mmt, up 20 percent from last year and 12 percent above the 5-year average (Figure 3). U.S. wheat shipments increased as demand from Asia and Africa rebounded. Wheat shipments destined to Africa increased 68 percent, and shipments to Asia rose 17 percent. Inspections of wheat increased 44 percent from last year in the Gulf but decreased 6 percent in the PNW.

Soybean Inspections

First quarter soybean inspections totaled 11 mmt, down 10 percent from last year and 9 percent below the 5-year average (Figure 3). U.S. soybean shipments to China decreased 22 percent during the first quarter 2013 and accounted for 57 percent of total U.S. soybean exports. Gulf inspections of soybeans (5.9 mmt) dropped 16 percent from last year and were 23 percent below the 5-year average. PNW soybean inspections (3.4 mmt) were unchanged from last year, but 11 percent above the 5-year average. Atlantic/Great Lakes soybean inspections (0.574 mmt) increased 43 percent as shipments to Asia increased.

Figure 3: First Quarter Grain Inspections by Types



Corn Inspections

First quarter corn inspected for export was the lowest on record since 1995, at 4.4 mmt tons, down 55 percent from last year and 63 percent below the 5-year average (Figure 3). Corn stocks were tighter because of the drought last year, causing export shipments to Asia to drop 44 percent from last year. First quarter corn inspections reached a record low in the Gulf, decreasing 20 percent from last year. PNW corn inspections were also at a record low, down 31 percent for the same period.

Market Outlook

Corn exports are expected to continue low for the remainder of the marketing year based on the USDA's April forecast that projected corn exports are expected to be 48 percent lower than last year. On the other hand, wheat and soybean export projections are just 2 and 1 percent lower than last year. Johnny.Hill@ams.usda.gov

Grain Transportation Indicators

Table 1
Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
04/24/13	261	234	202	n/a	212	177
04/17/13	265	234	202	152	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)

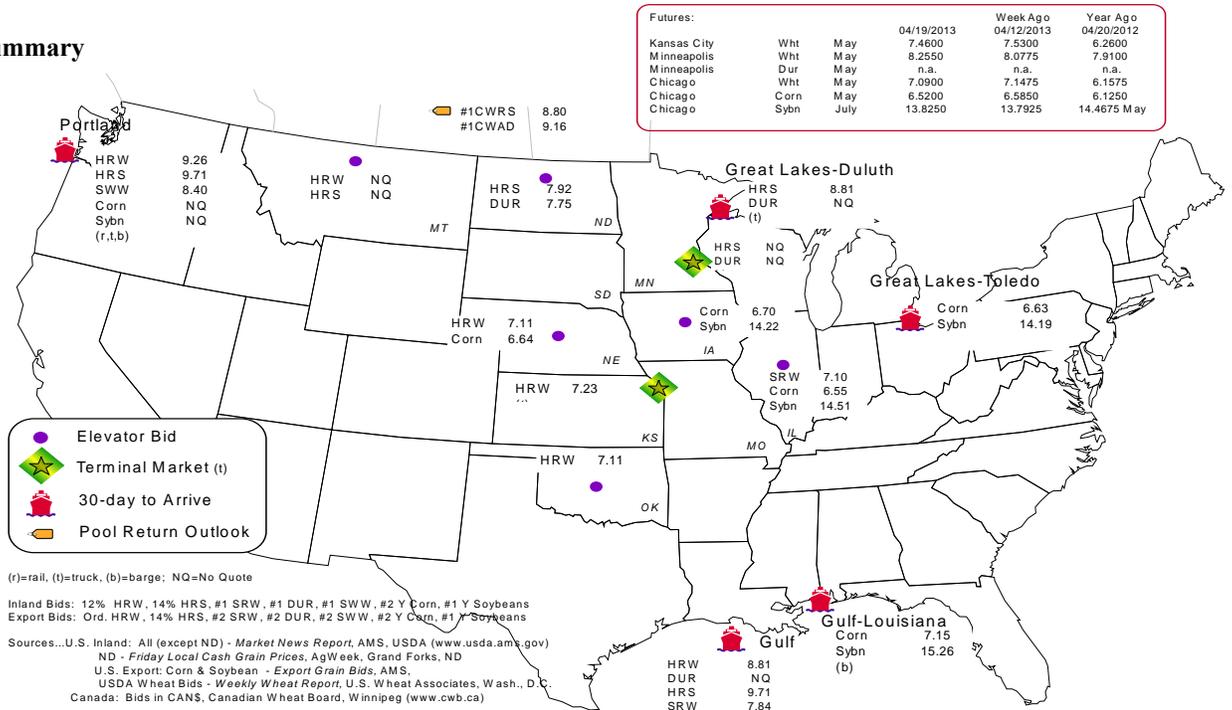
Commodity	Origin--Destination	4/19/2013	4/12/2013
Corn	IL--Gulf	-0.60	-0.56
Corn	NE--Gulf	-0.51	-0.56
Soybean	IA--Gulf	-1.04	-0.91
HRW	KS--Gulf	-1.58	-1.62
HRS	ND--Portland	-1.79	-1.93

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			
04/17/2013 ^p	1	564	1,334	29	1,928	04/13/13	1,254
04/10/2013 ^r	122	1,121	1,582	114	2,939	04/06/13	1,432
2013 YTD ^r	7,890	15,002	59,537	8,132	90,561	2013 YTD	18,420
2012 YTD ^r	3,488	11,226	72,123	7,771	94,608	2012 YTD	34,651
2013 YTD as % of 2012 YTD	226	134	83	105	96	% change YTD	53
Last 4 weeks as % of 2012 ²	99	165	55	25	69	Last 4wks % 2012	54
Last 4 weeks as % of 4-year avg. ²	24	90	60	19	61	Last 4wks % 4 yr	65
Total 2012	22,604	40,780	199,419	32,791	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.

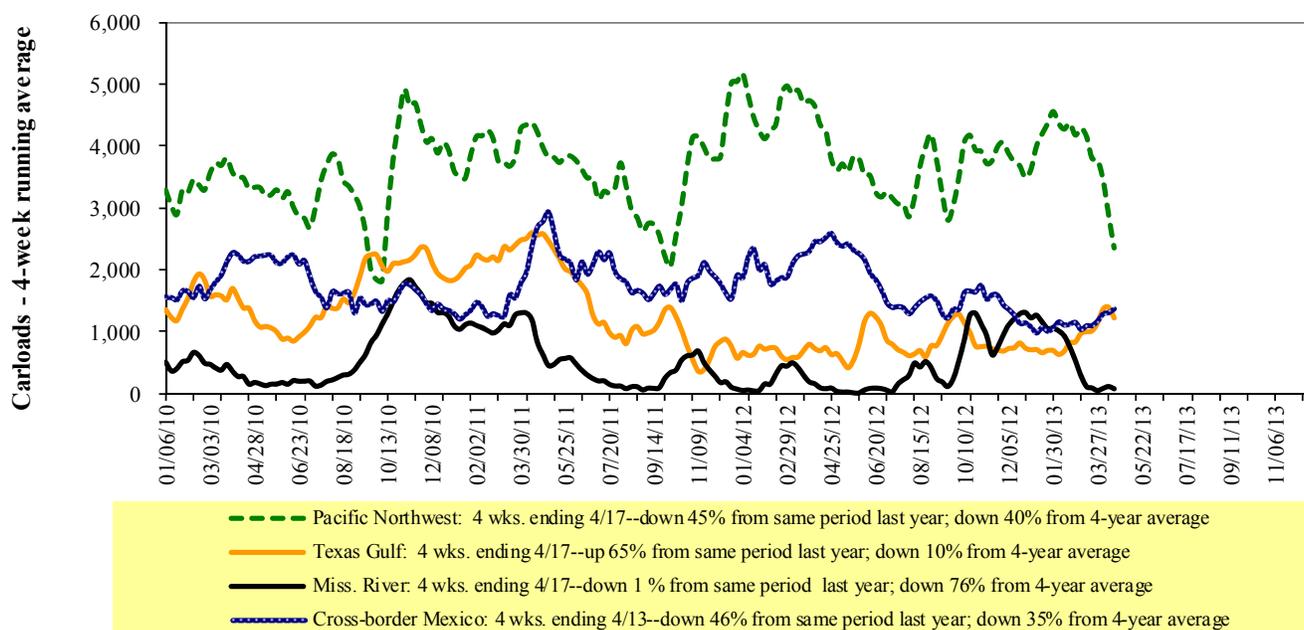
YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

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

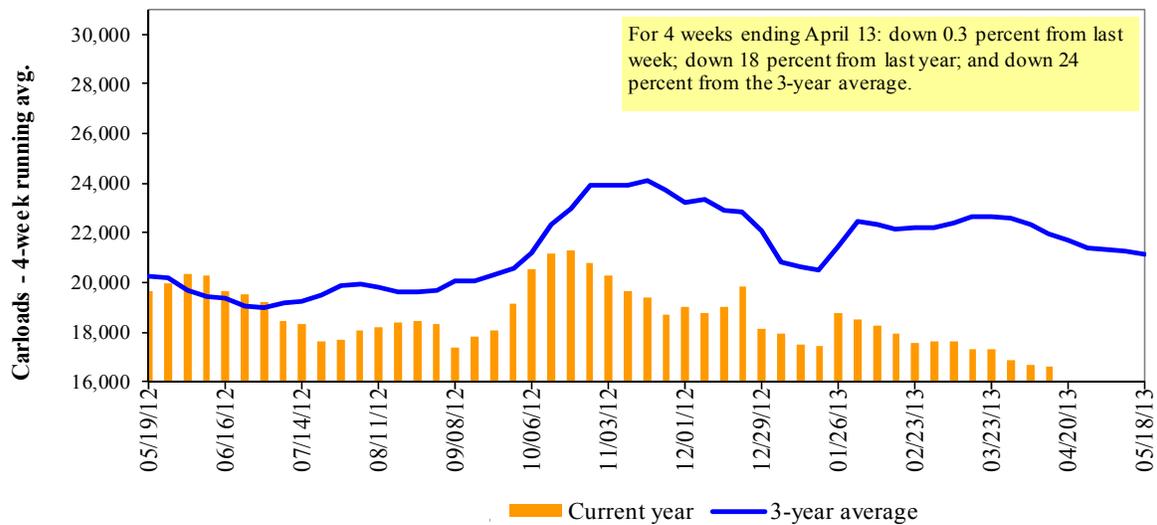
Table 4

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
04/13/13	1,372	2,468	8,425	496	4,389	17,150	3,356	6,161
This week last year	1,710	2,720	9,976	582	4,533	19,521	4,842	4,226
2013 YTD	22,849	37,759	138,452	7,112	57,773	263,945	50,854	80,661
2012 YTD	32,068	42,654	153,917	7,125	76,949	312,713	58,362	76,210
2013 YTD as % of 2012 YTD	71	89	90	100	75	84	87	106
Last 4 weeks as % of 2012	71	91	85	104	75	82	73	115
Last 4 weeks as % of 3-yr avg. ¹	69	81	80	68	71	76	73	111
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							
	May-13	May-12	Jun-13	Jun-12	Jul-13	Jul-12	Aug-13	Aug-12
BNSF ³								
COT grain units	0	1	no bids	0	no bids	no bids	no bids	no bids
COT grain single-car ⁵	5	0	0	10	no bids	0 . . 1	no bids	1 . . 10
UP ⁴								
GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no offer	n/a	n/a
GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	no offer	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.

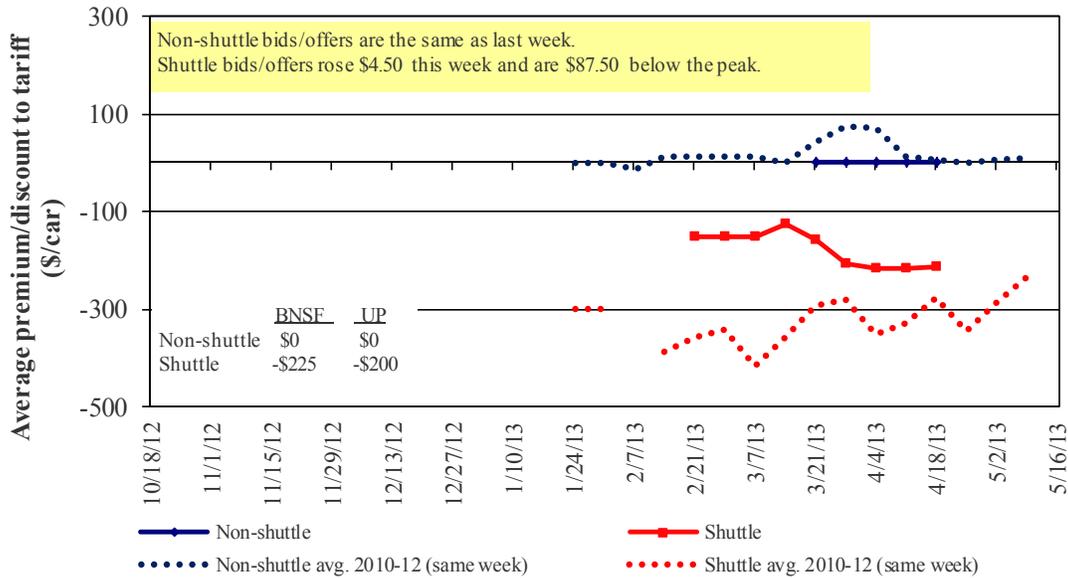
⁵Range is shown because average is not available. Not available = n/a.

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 May 2013, Secondary Market

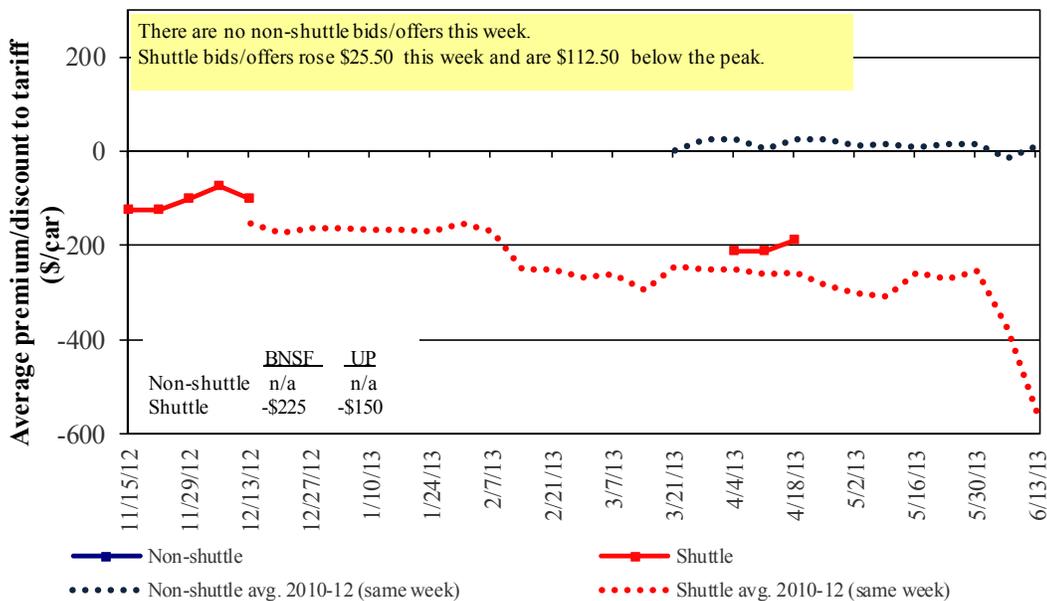


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

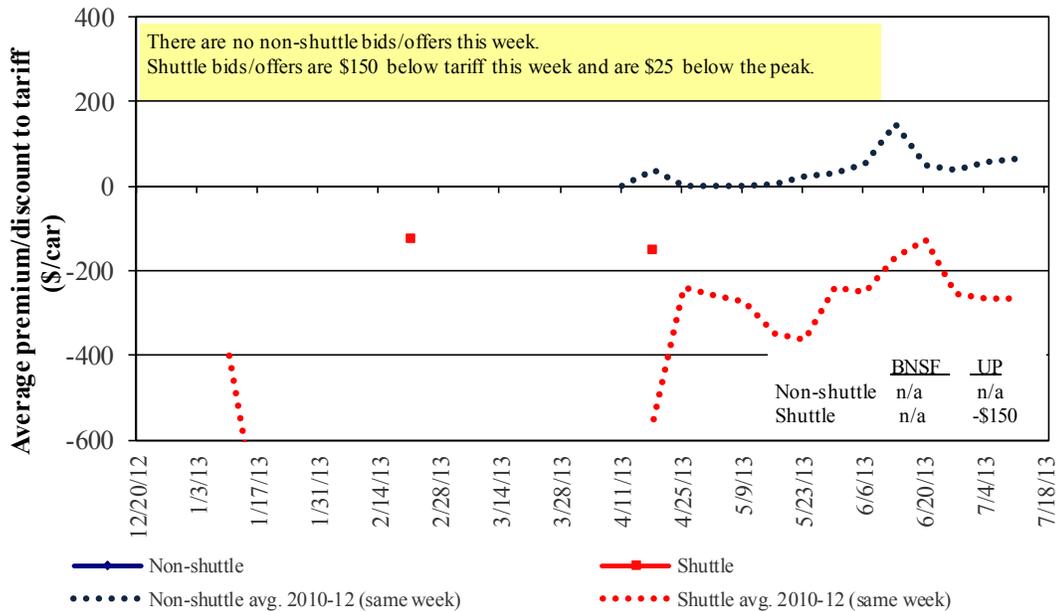
Bids/Offers for Railcars to be Delivered in June 2013, Secondary Market



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

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in July 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					
	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13
Non-shuttle						
BNSF-GF	-	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 2012	n/a	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	n/a
Change from same week 2012	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	(225)	(225)	n/a	n/a	n/a	n/a
Change from last week	n/a	(12)	n/a	n/a	n/a	n/a
Change from same week 2012	19	n/a	n/a	n/a	n/a	n/a
UP-Pool	(200)	(150)	(150)	(150)	(150)	n/a
Change from last week	17	n/a	n/a	-	-	n/a
Change from same week 2012	50	100	n/a	n/a	n/a	n/a

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

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

Data from 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 ^l 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
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,065	\$747	\$57.72	\$1.57	2
	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
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,200	\$779	\$49.44	\$1.35	2
	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

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel		Percent change Y/Y ⁴	
				surcharge per car ²	Tariff plus surcharge per: metric ton ³ bushel ³		
Wheat	MT	Chihuahua, CI	\$6,262	\$659	\$70.72	\$1.92	-17
	OK	Cuautitlan, 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	Tlalnepantla, 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

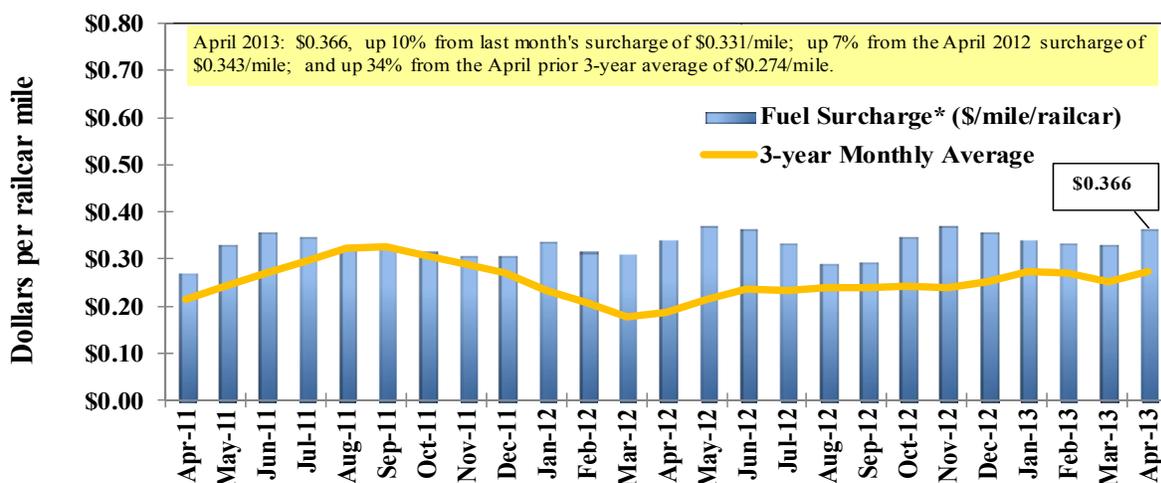
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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.

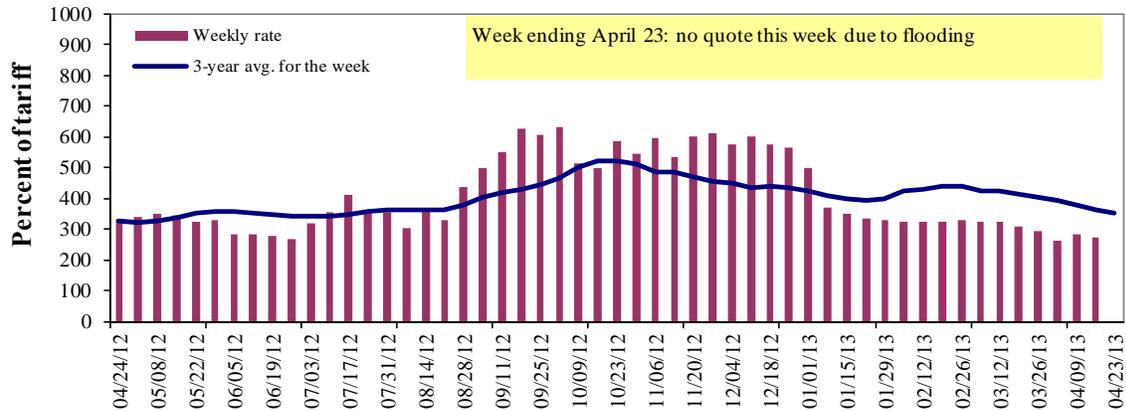
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

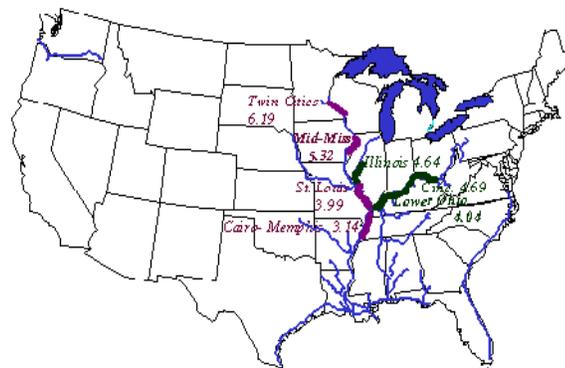
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	4/23/2013	0	0	0	223	195	195	180
	4/16/2013	392	312	273	225	197	197	182
\$/ton	4/23/2013	0.00	0.00	0.00	8.90	9.15	7.88	5.65
	4/16/2013	24.26	16.60	12.67	8.98	9.24	7.96	5.71
Current week % change from the same week:								
	Last year	-	-	-	-5	-29	-29	-12
	3-year avg. ²	-	-	-	-11	-30	-31	-11
Rate¹	May	380	300	273	238	200	200	185
	July	430	338	323	375	343	343	288

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; - no rates due to flooding

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9
Benchmark tariff rates



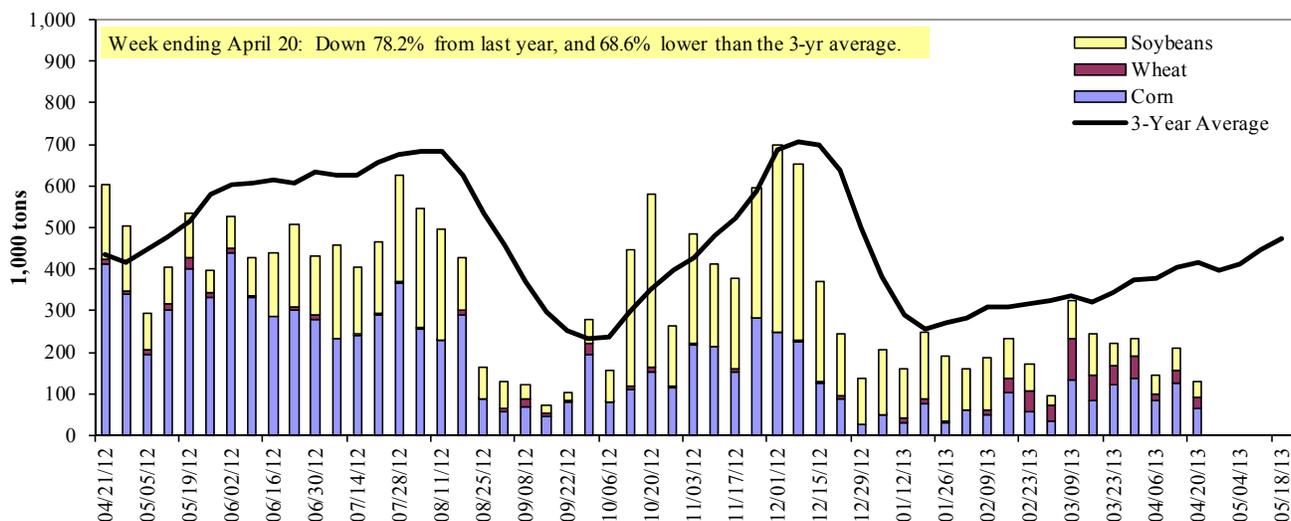
Calculating barge rate per ton:

(Index * 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 (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 4/20/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	49	0	27	0	75
Winfield, MO (L25)	19	2	5	0	25
Alton, IL (L26)	65	25	27	0	117
Granite City, IL (L27)	65	25	41	0	132
Illinois River (L8)	29	19	17	0	66
Ohio River (L52)	50	6	15	5	77
Arkansas River (L1)	0	29	0	0	29
Weekly total - 2013	116	61	56	5	238
Weekly total - 2012	445	37	200	5	687
2013 YTD ¹	1,988	1,332	3,140	90	6,549
2012 YTD	5,675	542	3,673	107	9,997
2013 as % of 2012 YTD	35	246	85	84	66
Last 4 weeks as % of 2012 ²	39	39	36	165	47
Total 2012	14,837	1,794	12,663	229	29,523

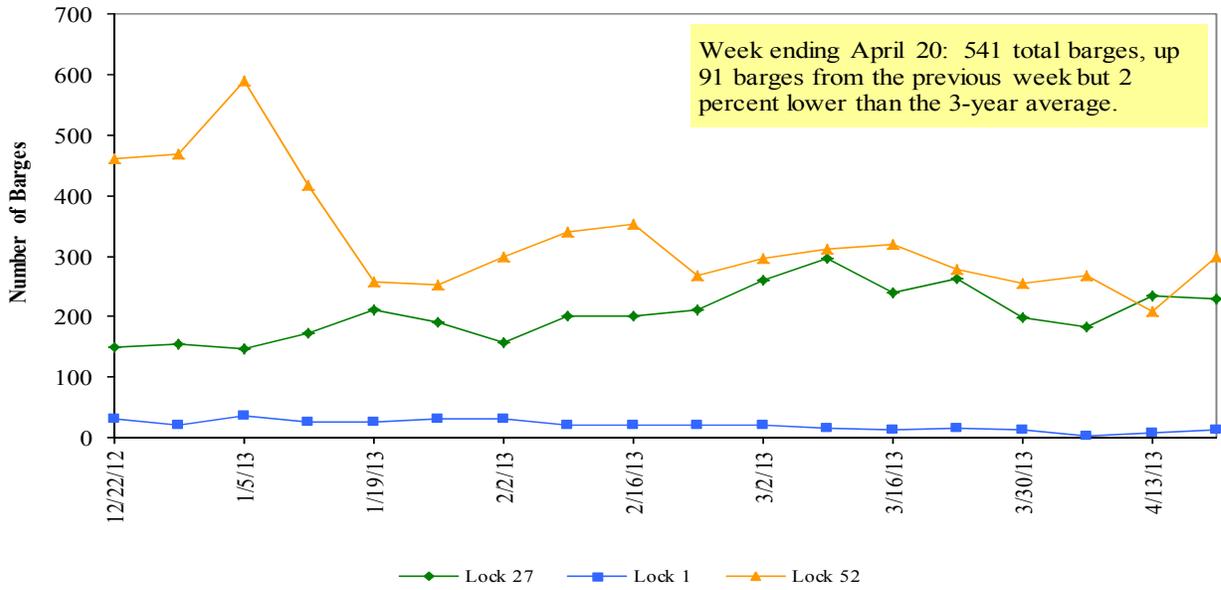
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2012.

Note: Total may not add exactly, due to rounding

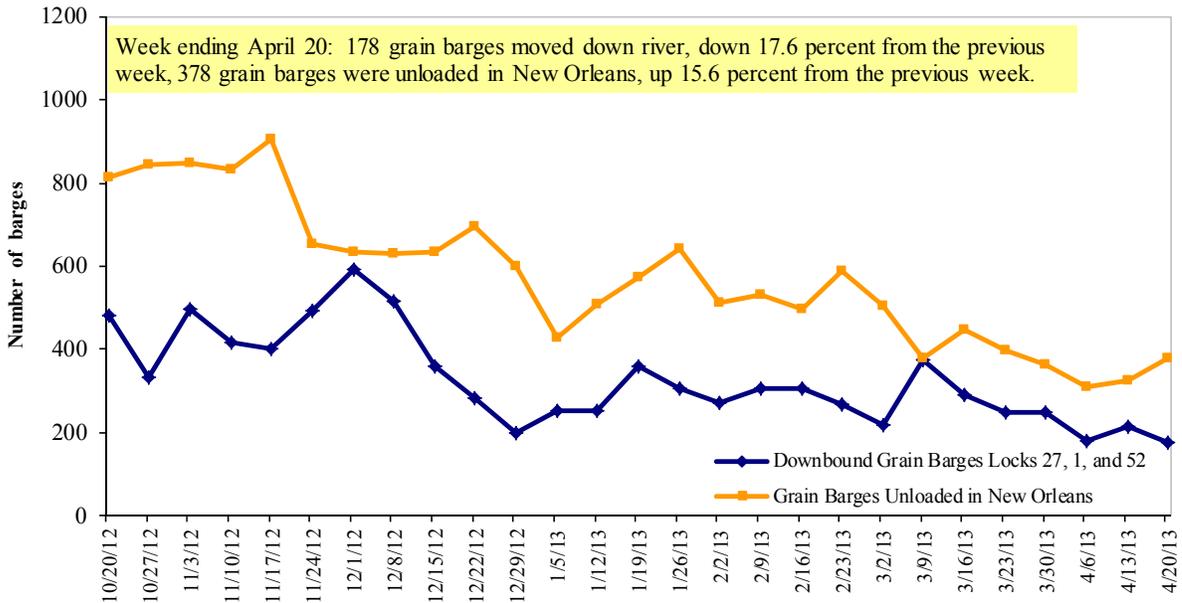
Source: U.S. Army Corps of Engineers

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 4/22/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.924	-0.053	-0.222
	New England	4.027	-0.078	-0.242
	Central Atlantic	3.982	-0.050	-0.263
	Lower Atlantic	3.862	-0.049	-0.188
II	Midwest ²	3.868	-0.055	-0.106
III	Gulf Coast ³	3.802	-0.050	-0.191
IV	Rocky Mountain	3.846	-0.036	-0.244
V	West Coast	3.990	-0.076	-0.355
	West Coast less California	3.885	-0.085	-0.414
	California	4.079	-0.068	-0.305
Total	U.S.	3.887	-0.055	-0.198

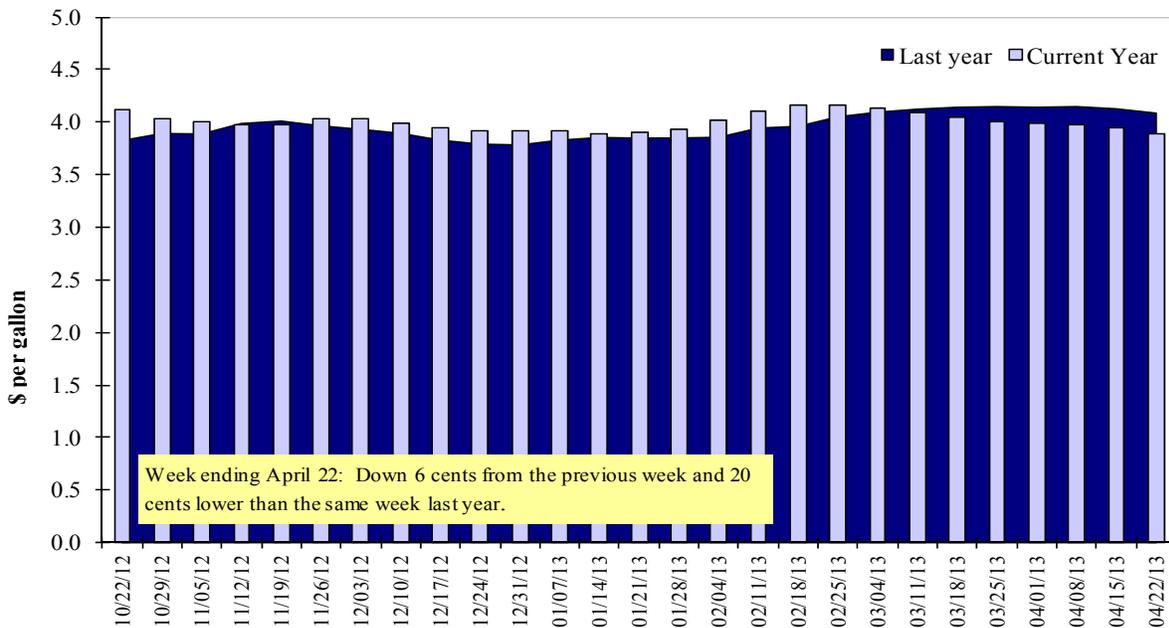
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
4/11/2013	1,856	978	910	475	125	4,345	4,310	2,954	11,609
This week year ago	1,221	882	1,026	1,074	22	4,224	9,551	4,162	17,937
Cumulative exports-marketing year²									
2012/13 YTD	8,123	4,203	5,020	4,124	423	21,893	11,796	33,683	67,372
2011/12 YTD	8,470	3,210	5,531	4,764	440	22,416	25,775	28,331	76,522
YTD 2012/13 as % of 2011/12	96	131	91	87	96	98	46	119	88
Last 4 wks as % of same period 2011/12	157	123	108	55	436	114	45	73	68
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 04/11/2013	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	5,623	9,650	(42)	12,367
Mexico	3,754	8,987	(58)	9,617
China	2,474	4,272	(42)	5,414
Korea	359	3,536	(90)	3,639
Venezuela	583	833	(30)	1,332
Top 5 Importers	12,793	27,277	(53)	32,369
Total US corn export sales	16,106	35,326	(54)	39,180
% of Projected	79%	90%		
Change from prior week	400	300		
Top 5 importers' share of U.S. corn export sales	79%	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 04/11/2013	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	22,352	21,078	6	24,602
Mexico	2,210	2,479	(11)	3,180
Japan	1,558	1,511	3	1,891
Indonesia	1,255	1,305	(4)	1,741
Egypt	677	812	(17)	1,292
Top 5 importers	28,053	27,185	3	32,706
Total US soybean export sales	36,637	32,493	13	37,060
% of Projected	100%	88%		
Change from prior week	308	313		
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 04/11/2013	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	3,573	3,607	(1)	3,512
Mexico	2,719	3,411	(20)	3,496
Nigeria	2,930	3,135	(7)	3,248
Philippines	1,875	1,976	(5)	2,039
Korea	1,397	1,922	(27)	1,983
Egypt	1,487	866	72	950
Taiwan	1,033	917	13	888
Indonesia	435	761	(43)	830
Venezuela	632	649	(3)	594
Iraq	209	572	(63)	572
Top 10 importers	16,291	17,817	(9)	18,111
Total US wheat export sales	26,238	26,640	(2)	28,560
% of Projected	94%	93%		
Change from prior week	541	366		
Top 10 importers' share of U.S. wheat export sales	62%	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 04/18/13	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	316	342	92	4,015	4,207	95	101	106	12,625
Corn	0	35	0	1,194	2,107	57	25	24	5,512
Soybeans	0	0	n/a	3,551	3,868	92	59	72	10,347
Total	316	377	84	8,761	10,181	86	66	70	28,484
Mississippi Gulf									
Wheat	201	93	215	2,820	2,015	140	114	152	5,462
Corn	275	266	103	3,357	7,219	47	58	49	18,068
Soybeans	58	96	61	6,545	7,668	85	33	40	24,684
Total	534	455	117	12,723	16,902	75	61	62	48,215
Texas Gulf									
Wheat	116	150	77	1,989	1,470	135	203	103	5,912
Corn	0	0	n/a	42	238	18	0	0	336
Soybeans	0	0	n/a	122	0	n/a	n/a	0	626
Total	116	150	77	2,154	1,708	126	163	87	6,874
Interior									
Wheat	17	5	335	275	397	69	111	59	1,218
Corn	41	70	58	809	2,747	29	120	33	6,115
Soybeans	60	65	93	1,353	1,422	95	43	73	4,204
Total	118	140	84	2,436	4,566	53	33	48	11,538
Great Lakes									
Wheat	23	45	52	113	26	444	412	92	481
Corn	0	0	n/a	0	30	0	0	0	56
Soybeans	0	0	n/a	4	2	154	0	0	713
Total	23	45	52	117	58	202	252	85	1,250
Atlantic									
Wheat	0	0	n/a	297	2	n/a	n/a	31	341
Corn	0	0	n/a	2	62	3	0	0	143
Soybeans	17	11	156	646	429	151	99	87	1,460
Total	17	11	155	946	492	192	111	47	1,944
U.S. total from ports²									
Wheat	672	635	106	9,510	8,117	117	120	111	26,040
Corn	316	372	85	5,405	12,402	44	43	38	30,230
Soybeans	135	171	79	12,222	13,389	91	49	58	42,035
Total	1,123	1,178	95	27,137	33,908	80	67	65	98,305

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

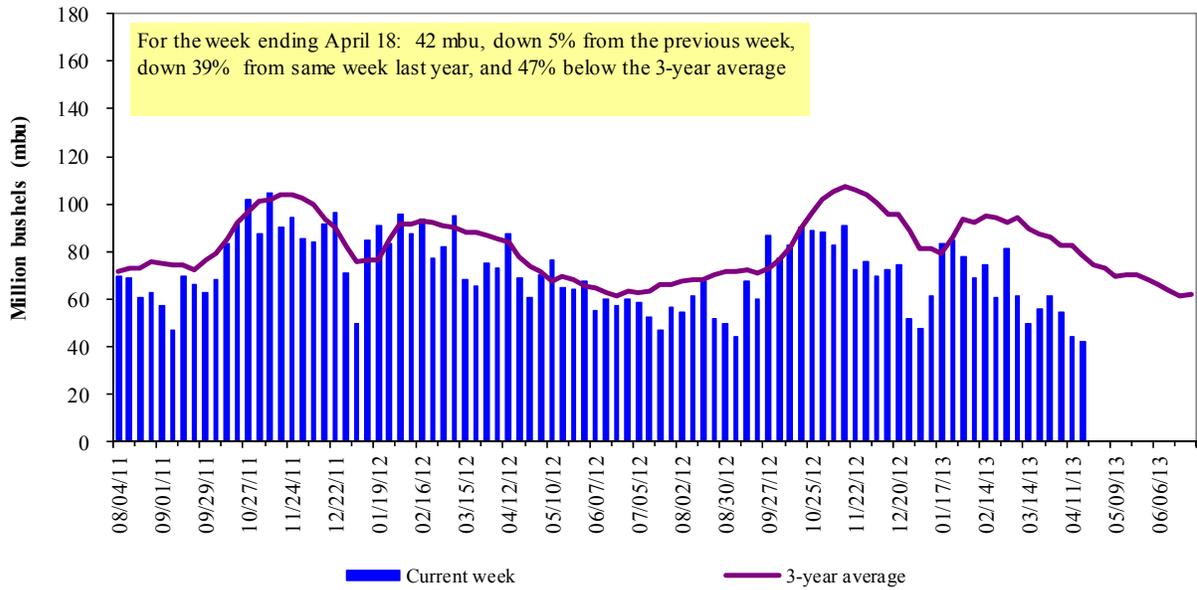
² Total includes only port regions shown above; Interior land-based shipments now included.

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)

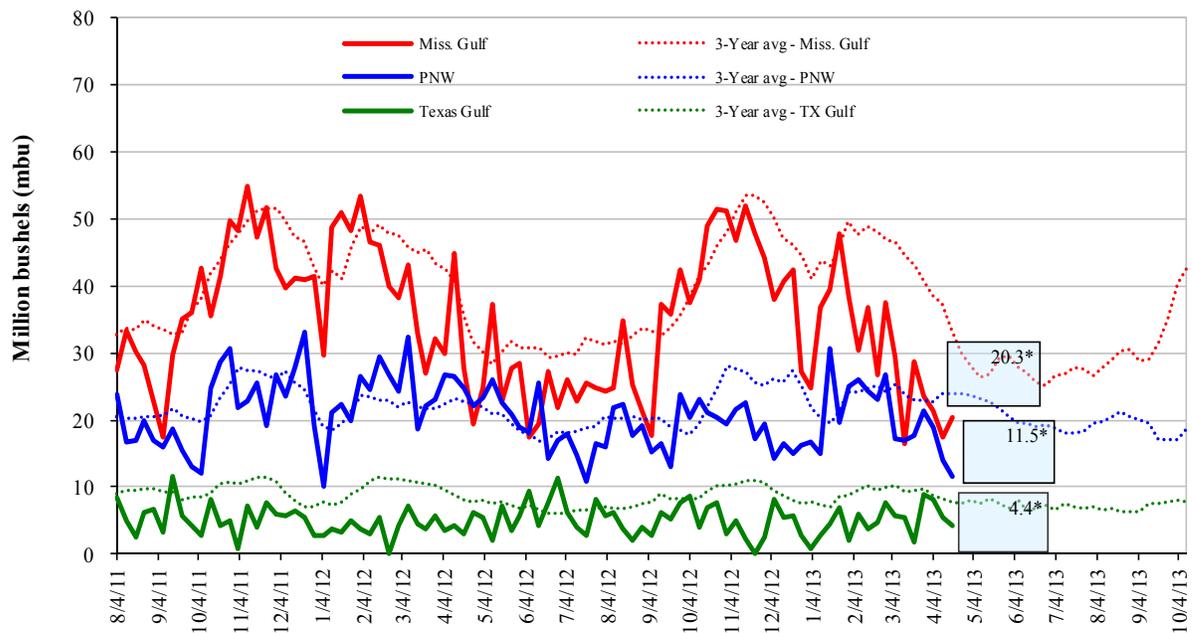


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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 18 % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	up 17	down 23	up 7	down 17
Last year (same week)	down 27	up 37	down 20	down 53
3-yr avg. (4-wk mov. avg.)	down 39	down 46	down 40	down 51

Ocean Transportation

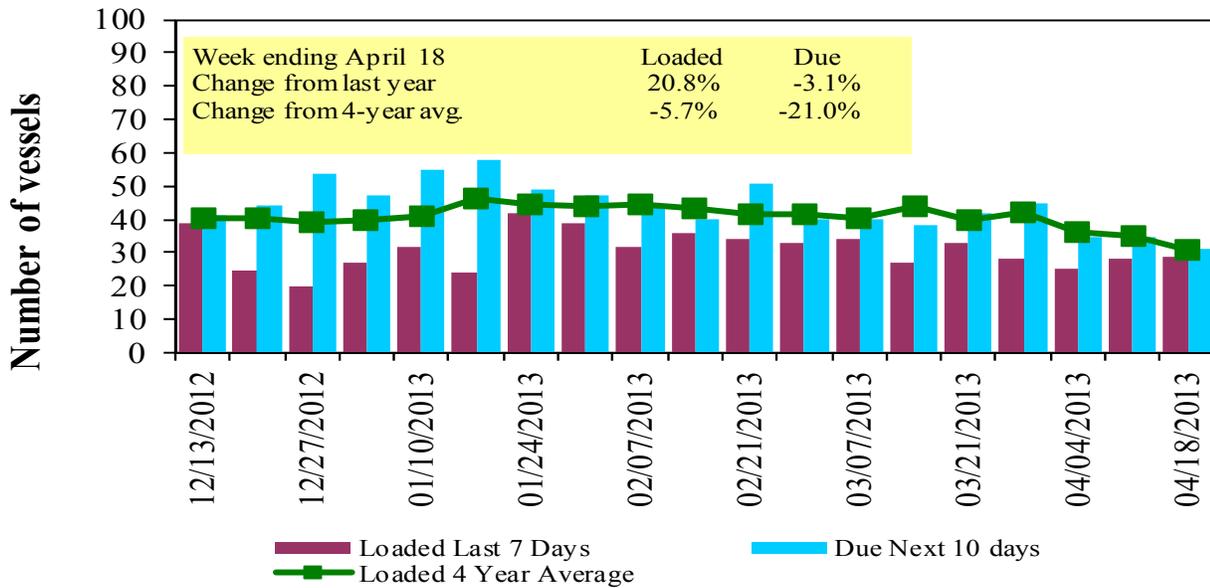
Table 17

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
4/18/2013	19	29	31	6	n/a
4/11/2013	19	28	35	10	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

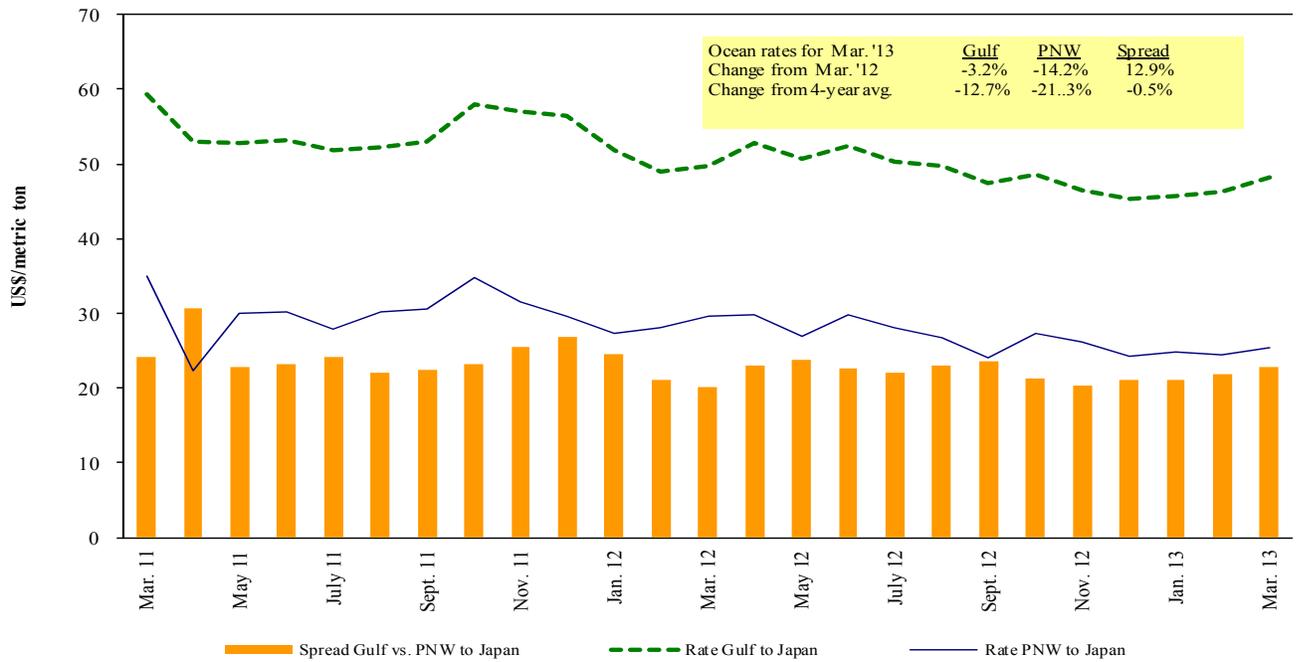
Figure 16
U.S. Gulf^d Vessel Loading Activity



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 04/20/2013

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	Grain	May 1/10	55,000	40.00
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

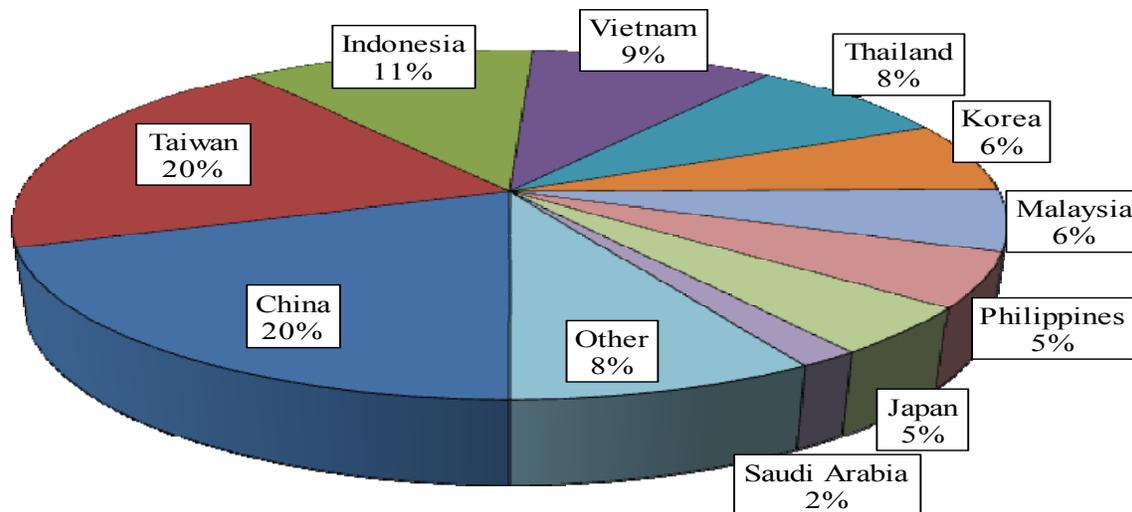
¹50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

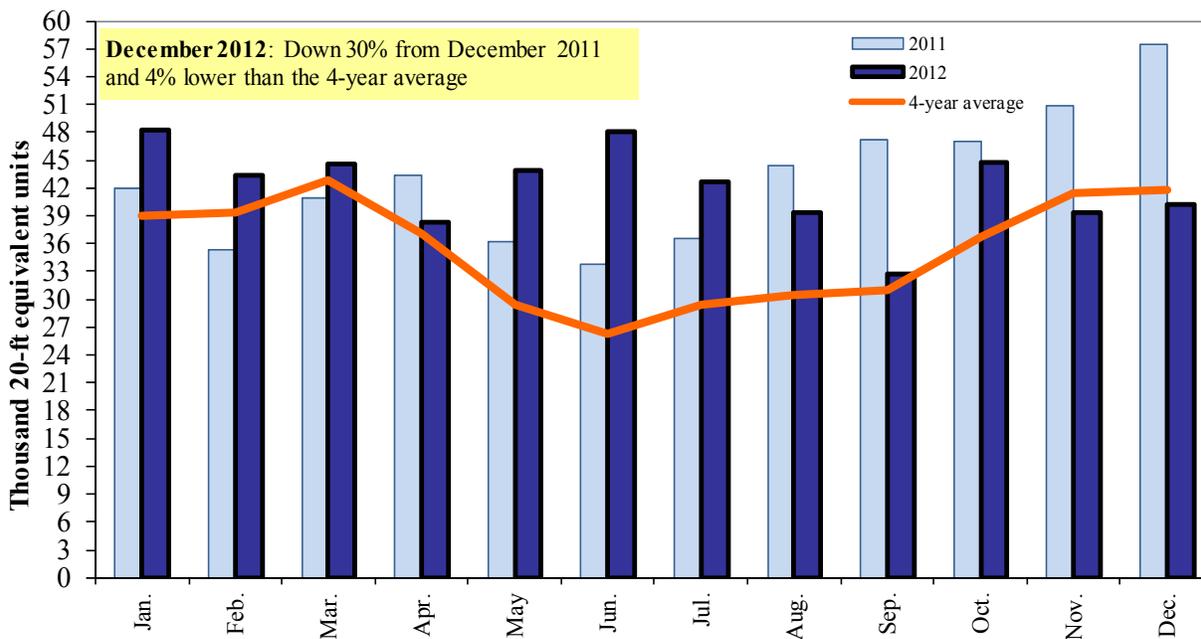


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report*. April 25, 2013. Web: <http://dx.doi.org/10.9752/TS056.04-25-2013>

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