



Grain Transportation Report

A weekly publication of the Transportation and Marketing Programs/Transportation Services Division
www.ams.usda.gov/GTR

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May 23, 2013

WEEKLY HIGHLIGHTS

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Corn Inspections Continue to Increase

For the week ending May 16, total inspections of corn reached .370 million metric tons (mmt), up 17 percent from the past week but 46 percent below last year at this time. Corn inspections increased for the second consecutive week despite tight stocks, and were also 28 percent above the 4-week running average as demand from Asia and Mexico increased. Increased Asian demand also boosted soybean inspections (.091 mmt), which increased 15 percent from the previous week. Wheat inspections (.576 mmt), however, dropped 12 percent from the past week. **Total inspections of grain** (corn, wheat, and soybeans) from all major export regions reached 1.0 million metric tons (mmt), down only 1 percent from the past week but 40 percent below last year at this time. Outstanding export sales decreased for each of the major grains, but dropped only slightly for corn.

River Conditions Continue to Improve

After cresting, water levels on the Upper Mississippi, Illinois, and Lower Ohio Rivers continue to fall. On the Illinois River, Marseilles Lock was reopened to traffic with some navigation restrictions on May 15. On May 22, the National Weather Service (NWS) forecasts the Mississippi River at St. Louis, MO, to drop from the current 26-to-27-foot stage to 7 feet in 4 weeks. NWS forecasts are based on observed runoff and only include the next 24 hours of forecast precipitation. Presently, only the southernmost portion of the Mississippi River—in the New Orleans area—has not reached crest stages. New Orleans is forecast to crest on May 23.

Grain Moving Slowly on Rail and Ocean

For the first time since records began in 1995, the 4-week average for **carloads of grain** originated by U.S. railroads fell below 16,000 cars for the week ending May 11. The 4-week average were 15,935 cars, down 18 percent from last year and 25 percent from the 3-year average. Weekly carloads of grain for the week ending May 11 were 15,555 cars, down 8 percent from last week, 22 percent from last year, and 25 percent from the 3-year average. Also, recent ocean-going grain vessel loading activity at the U.S. Gulf has been sluggish. During the 4 weeks ending May 16, the number of grain vessels loaded averaged 23 per week, compared to 32 per week during the preceding 12 weeks and an average of 33 per week for 2012. The number of vessels expected to be loaded within the next 10 days averaged 35 vessels during the 4 weeks ending May 16, compared to 41 vessels loaded within the next 10 days during the preceding 12 weeks and an average of 46 vessels loaded within the next 10 days for 2012. U.S. grain export movements have been slowed by competition from a bumper crop in South America, lower U.S. grain stocks, and increased domestic demand. In addition, U.S. farmers may not currently be selling crops due to spring planting and the possibility of higher crop prices later this summer when old crop stocks decrease.

Snapshots by Sector

Rail

During the week ending May 16, average June non-shuttle **secondary railcar bids/offers per car** were \$8.50 above tariff, down \$16.50 from last week and the same as last year. Average shuttle bids/offers were \$90 below tariff, up \$60 from last week and \$164 higher than last year.

Barge

During the week ending May 18, **barge grain movements** totaled 383,719 tons, 22 percent higher than the previous week and 40 percent lower than the same period last year.

During the week ending May 18, 289 grain barges **moved down river**, up 42 percent from last week; 376 grain barges were **unloaded in New Orleans**, up 86 percent from the previous week.

Ocean

During the week ending May 16, 20 **ocean-going grain vessels** were loaded in the Gulf, 33 percent less than the same period last year. Thirty-nine vessels are expected to be loaded within the next 10 days, 8 percent more than the the same period last year.

During the week ending May 17, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$44.50 per mt, down 1 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$23.50 per mt, down 2 percent from the previous week.

Fuel

During the week ending May 20, U.S. average **diesel fuel prices** were up 2 cents from the previous week at \$3.89 per gallon—7 cents lower than the same week last year.

Feature Article/Calendar

Wheat Transportation Costs and Landed Costs Up from Last Year

During the first quarter, transportation costs for shipping wheat from Kansas and North Dakota to Japan were mixed. The total landed costs for shipping wheat through the Pacific Northwest (PNW) and Gulf were down from the previous quarter but up from the first quarter 2012, primarily because of higher truck rates and increased farm values. Year-to-year transportation costs for wheat from each State increased overall for shipping wheat through the PNW and Gulf (tables 1 and 2).

Quarter-to-quarter transportation costs for shipping wheat through the PNW to Japan decreased less than 1 percent from Kansas and a little more than 1 percent from North Dakota. Lower quarter-to-quarter ocean rates more than offset increases in truck and rail rates, resulting in a drop in PNW transportation costs. Year-to-year costs for shipping wheat to Japan through the PNW were up slightly from both States. The quarter-to-quarter transportation costs to ship wheat from Kansas through the Gulf decreased 3 percent because of lower rail rates, but increased 1 percent from North Dakota because rail rates increased there. Year-to-year transportation costs for shipping through the Gulf increased 3 percent from Kansas and 1 percent from North Dakota (table 2).

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

Mode	KS					ND				
	2012 1st qtr	2012 4th qtr	2013 1st qtr	Year-to-Year change	Quarterly change	2012 1st qtr	2012 4th qtr	2013 1st qtr	Year-to-Year change	Quarterly change
	\$/metric ton			%	%	\$/metric ton			%	%
Truck	9.14	10.86	10.98	20.13	1.10	9.14	10.86	10.98	20.13	1.10
Rail ¹	52.71	53.90	54.49	3.38	1.09	52.89	55.27	55.17	4.31	-0.18
Ocean vessel	28.28	25.90	24.84	-12.16	-4.09	28.28	25.90	24.84	-12.16	-4.09
Transportation Costs	90.13	90.66	90.31	0.20	-0.39	90.31	92.03	90.99	0.75	-1.13
Farm Value ²	249.61	309.26	280.23	12.27	-9.39	294.93	307.30	295.05	0.04	-3.99
Total Landed Cost	339.74	399.92	370.54	9.07	-7.35	385.24	399.33	386.04	0.21	-3.33
Transport % of landed cost	26.53	22.67	24.37			23.44	23.05	23.57		

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

Mode	KS					ND				
	2012 1st qtr	2012 4th qtr	2013 1st qtr	Year-to-Year change	Quarterly change	2012 1st qtr	2012 4th qtr	2013 1st qtr	Year-to-Year change	Quarterly change
	\$/metric ton			%	%	\$/metric ton			%	%
Truck	9.14	10.86	10.98	20.13	1.10	9.14	10.86	10.98	20.13	1.10
Rail ¹	34.31	41.51	38.60	12.50	-7.01	63.33	65.66	66.21	4.55	0.84
Ocean vessel	50.18	46.80	46.73	-6.88	-0.15	50.18	46.80	46.73	-6.88	-0.15
Transportation Costs	93.63	99.17	96.31	2.86	-2.88	122.65	123.32	123.92	1.04	0.49
Farm Value ²	249.61	309.26	280.23	12.27	-9.39	294.93	307.30	295.05	0.04	-3.99
Total Landed Cost	343.24	408.43	376.54	9.70	-7.81	417.58	430.62	418.97	0.33	-2.71
Transport % of landed cost	27.28	24.28	25.58			29.37	28.64	29.58		

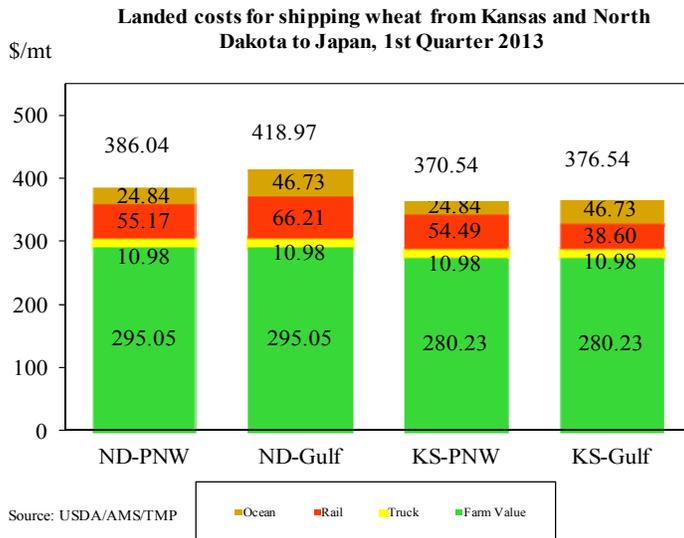
Source: USDA/AMS/TMP

¹ Rail tariff rates include fuel surcharges and revisions for heavy axle railcars and shuttle trains.

² Source: USDA/NASS, wheat prices for North Dakota (mainly HRS) and Kansas (mainly HRW)

First quarter 2013 total landed costs (farm value plus transportation costs) to ship wheat from each State decreased from the previous quarter as overall transportation costs decreased for all routes except North Dakota through the Gulf (tables 1 and 2). Lower wheat farm values also contributed to the drop in total landed costs. The landed costs for shipping wheat ranged from \$371 to \$419 per metric ton (figure). First quarter transportation costs represented 24 percent of the total landed costs through the PNW—up from the previous quarter—and 26 and 30 percent through the Gulf, also up from the previous quarter for each State (tables 1 and 2).

First quarter farm values for Kansas wheat were down 9 percent quarter-to-quarter, but up 12 percent from last year; farm values for North Dakota wheat decreased 4 percent quarter-to-quarter, but were unchanged year-to-year (tables 1 and 2). Wheat farm values were pushed down by abundant supplies resulting from a rebound from last year's drought-affected crop.



The cost of moving wheat by truck to a railhead increased by just 1 percent quarter to quarter as demand for grain moved by truck remained steady. Truck rates increased 20 percent from last year due in part to higher diesel prices.

Quarter-to-quarter ocean freight rates for shipping wheat to Japan decreased 4 percent in the PNW but remained mostly unchanged in the Gulf during the first quarter (*see tables 1, 2*). The drop in rates continued due to sluggish demand for bulk commodities and excess vessel supply (*see*

GTR dated 5/02/13). Compared to last year, ocean rates for shipping wheat to Japan decreased 12 percent through the PNW and 7 percent through the Gulf; partly because of weather disruptions and labor disputes abroad.

Quarter-to-quarter rail tariff rates for shipping wheat to the PNW increased 1 percent from Kansas but remained unchanged from North Dakota (*see table 1*). Compared to last year, however, wheat rail rates from Kansas and North Dakota to the PNW increased 3 and 4 percent, respectively, due in part to higher fuel surcharges. Quarter-to-quarter rail rates decreased 7 percent from Kansas to the Gulf but increased 1 percent from North Dakota to the Gulf (*see table 2*). Year-to-year rail rates to the Gulf, however, increased 13 percent from Kansas and 5 percent from North Dakota.

According to the Grain Inspection, Packers and Stockyards Administration, first quarter wheat exports to Japan totaled 1 million metric tons (mmt), up 98 percent from the fourth quarter of 2012 and 24 percent above the first quarter of last year. Total first quarter wheat exports to Japan accounted for about 15 percent of total U.S. wheat exports. For the same period, however, total U.S. wheat exports reached 6.79 mmt, up 8 percent from the first quarter of last year and 56 percent higher than the fourth quarter of 2012. According to USDA, the May forecast for wheat exports for the 2013/14 marketing year is 10 percent below the 2012/13 estimate as competition increases abroad. 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
05/22/13	261	234	205	152	199	167
05/15/13	259	233	205	154	201	170

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)

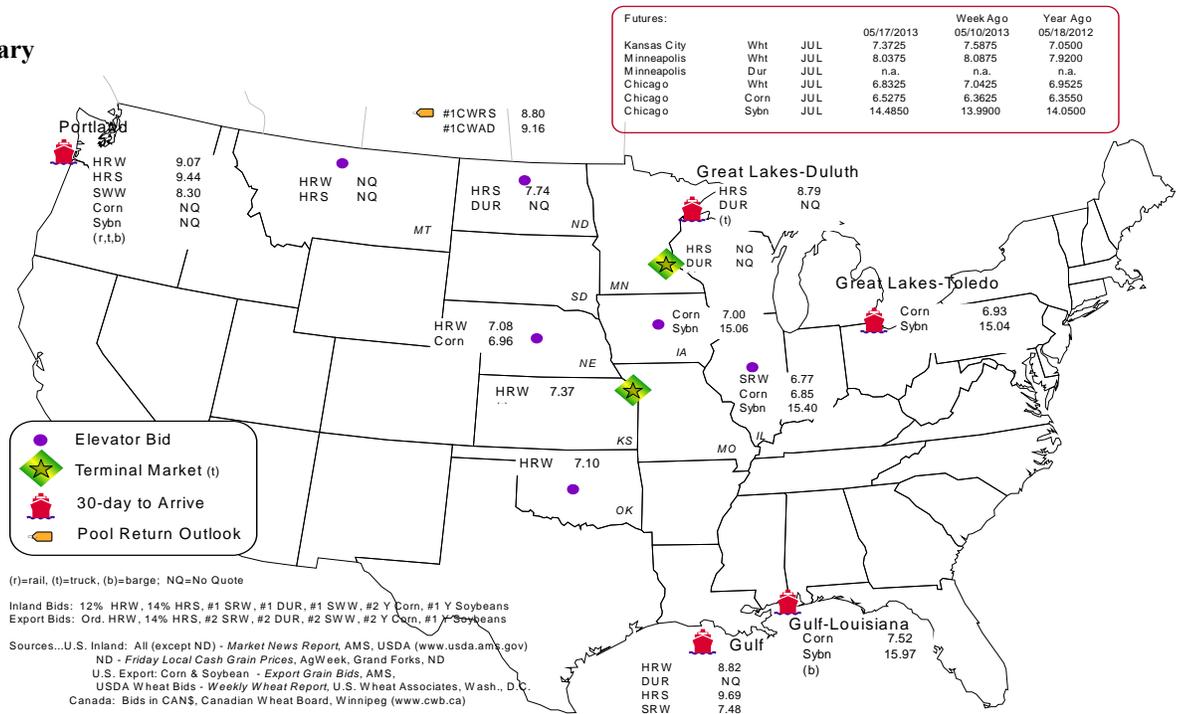
Commodity	Origin--Destination	5/17/2013	5/10/2013
Corn	IL--Gulf	-0.67	-0.69
Corn	NE--Gulf	-0.56	-0.59
Soybean	IA--Gulf	-0.91	-0.95
HRW	KS--Gulf	-1.45	-1.51
HRS	ND--Portland	-1.70	-1.86

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			
05/15/2013 ^p	122	1,023	914	238	2,297	05/11/13	1,178
05/08/2013 ^r	3	1,717	1,106	110	2,936	05/04/13	1,187
2013 YTD ^r	8,170	21,857	64,769	8,926	103,722	2013 YTD	23,385
2012 YTD ^r	3,585	12,893	86,463	9,128	112,069	2012 YTD	44,332
2013 YTD as % of 2012 YTD	228	170	75	98	93	% change YTD	53
Last 4 weeks as % of 2012 ²	289	344	36	59	69	Last 4wks % 2012	51
Last 4 weeks as % of 4-year avg. ²	32	132	38	56	59	Last 4wks % 4 yr	62
Total 2012	22,604	40,780	199,419	33,585	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.

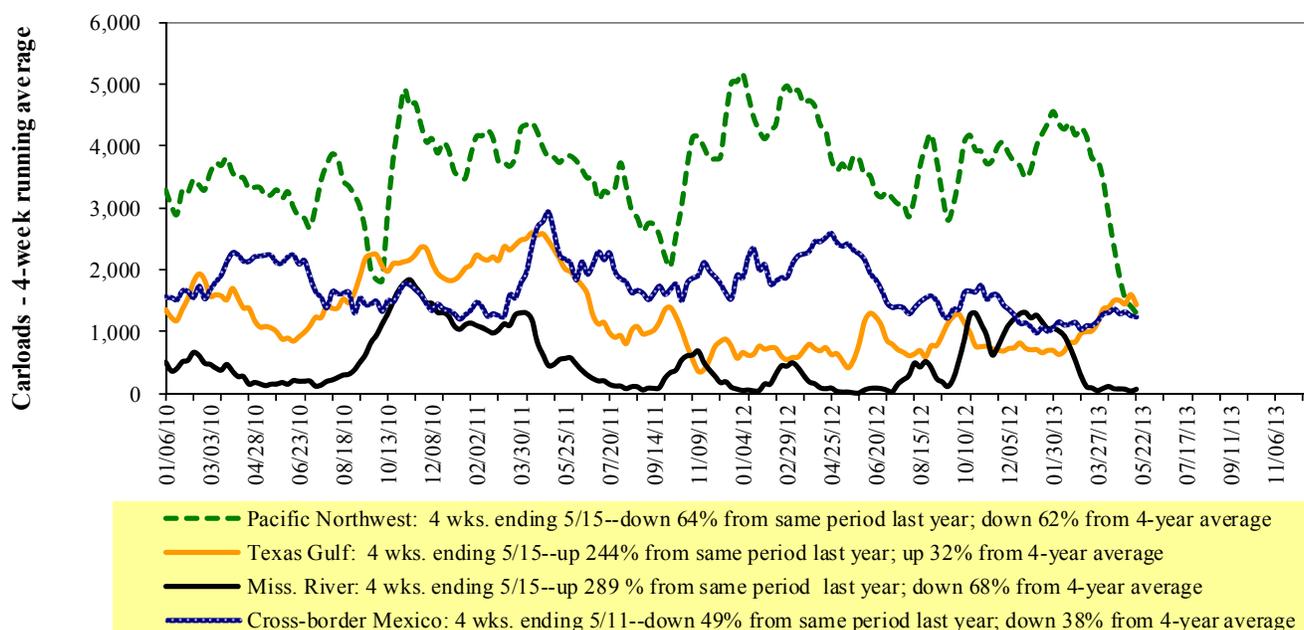
YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

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

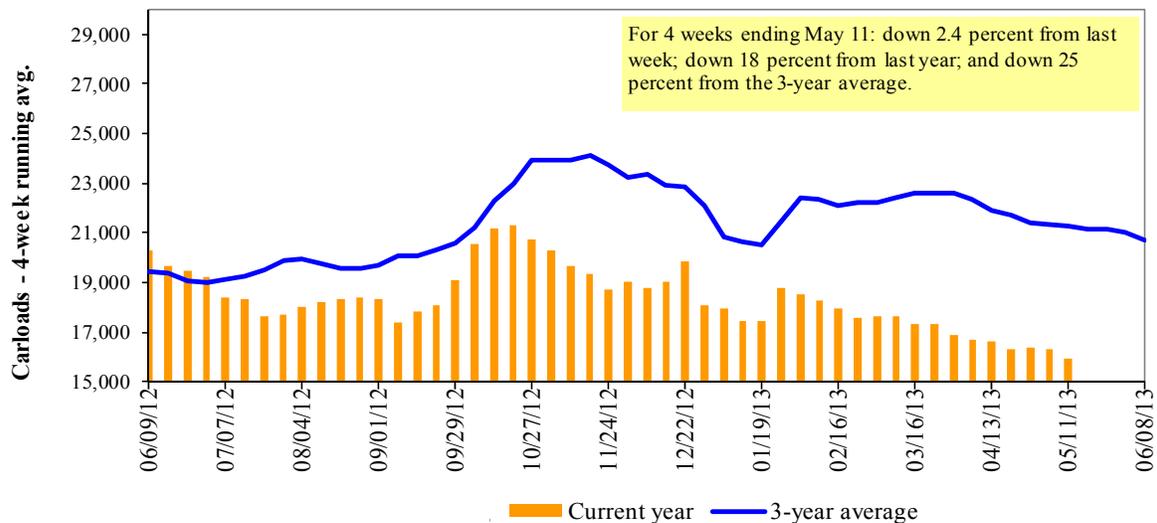
Table 4

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
05/11/13	1,625	2,820	6,923	512	3,675	15,555	3,804	5,561
This week last year	2,207	2,751	9,336	636	4,908	19,838	3,803	3,989
2013 YTD	28,825	47,415	168,709	9,270	73,466	327,685	65,642	102,640
2012 YTD	38,951	53,918	191,819	9,218	96,221	390,127	74,527	94,901
2013 YTD as % of 2012 YTD	74	88	88	101	76	84	88	108
Last 4 weeks as % of 2012	87	86	80	103	81	82	91	118
Last 4 weeks as % of 3-yr avg. ¹	77	78	75	83	75	76	90	103
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							
	Jun-13	Jun-12	Jul-13	Jul-12	Aug-13	Aug-12	Sep-13	Sep-12
BNSF ³								
COT grain units	no bids	0	no bids	no bids	0	no offer	1	no offer
COT grain single-car ⁵	0	0 . . 25	no bids	0	no bids	no offer	0	no offer
UP ⁴								
GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	no bids	no bids	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.

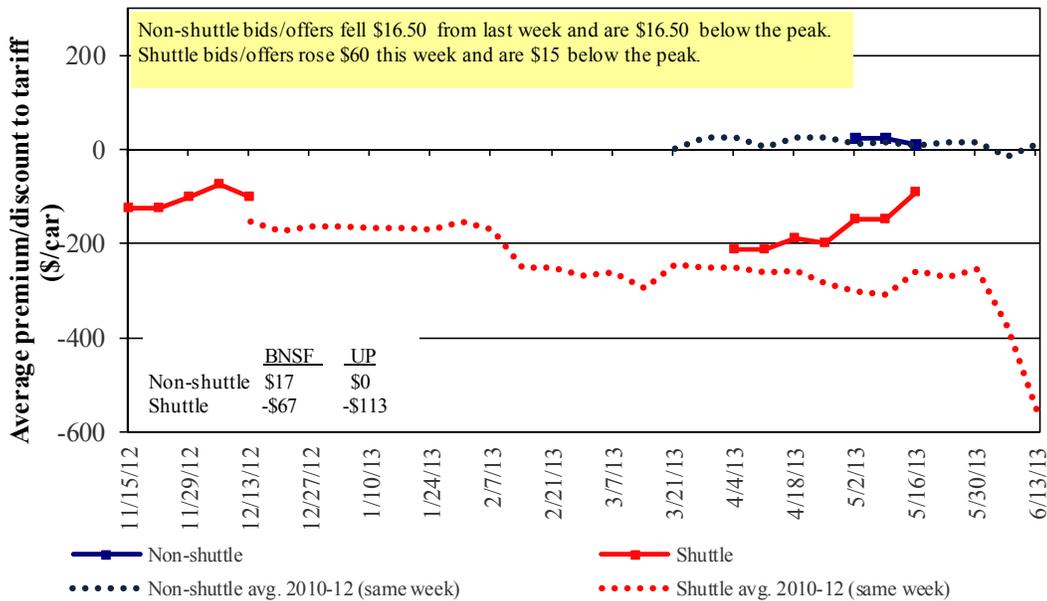
⁵Range is shown because average is not available. Not available = n/a.

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 June 2013, Secondary Market

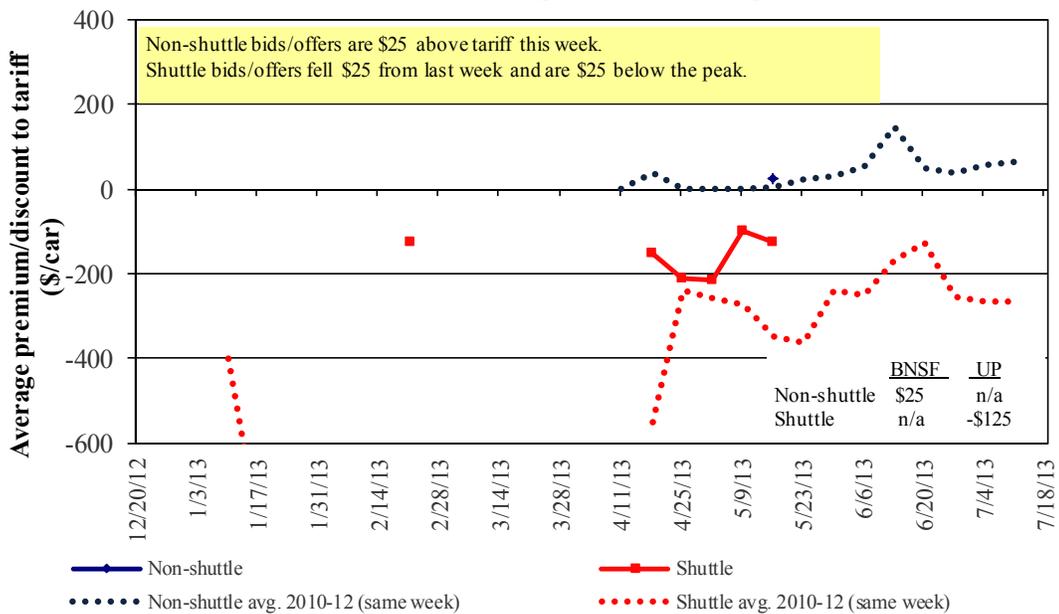


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

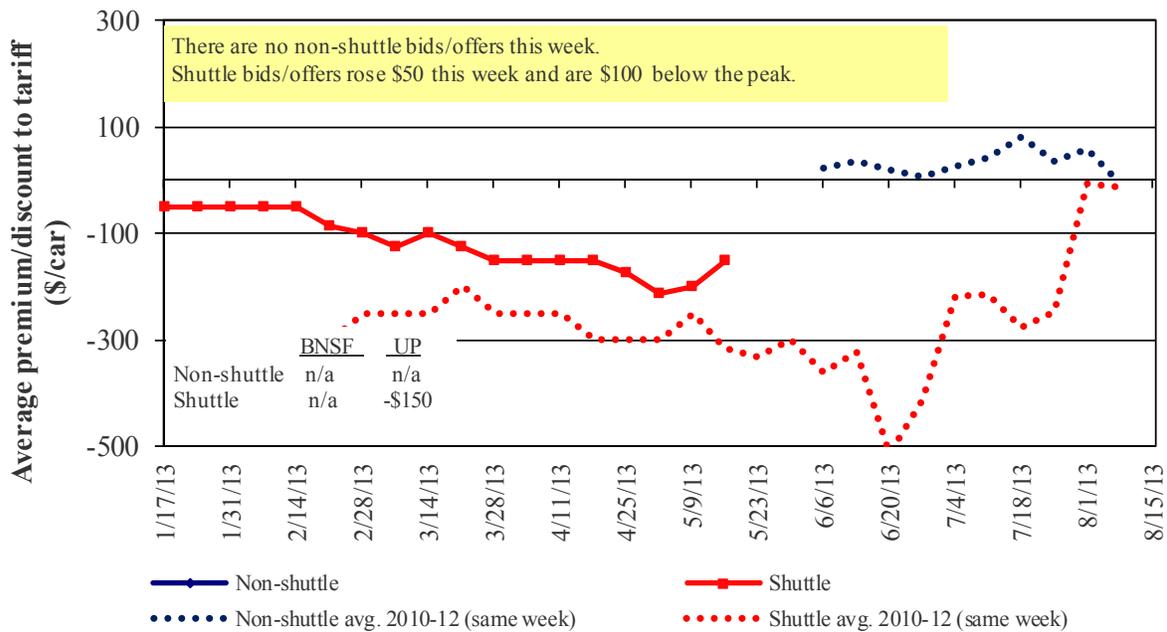


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in August 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					
	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13
Non-shuttle						
BNSF-GF	17	25	n/a	n/a	n/a	n/a
Change from last week	(8)	n/a	n/a	n/a	n/a	n/a
Change from same week 2012	9	25	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	(9)	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	(67)	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	41	n/a	n/a	n/a	n/a	n/a
UP-Pool	(113)	(125)	(150)	(125)	n/a	n/a
Change from last week	37	(25)	50	75	n/a	n/a
Change from same week 2012	287	175	250	125	n/a	n/a

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

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

Data from James B. Joiner Co., Tradewest Brokerage Co.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

Effective date:				Fuel	Tariff plus surcharge per:		Percent	
5/1/2013	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	\$202	\$33.23	\$0.90	5	
	Grand Forks, ND	Duluth-Superior, MN	\$3,543	\$119	\$36.37	\$0.99	8	
	Wichita, KS	Los Angeles, CA	\$6,026	\$612	\$65.92	\$1.79	2	
	Wichita, KS	New Orleans, LA	\$3,645	\$356	\$39.73	\$1.08	4	
	Sioux Falls, SD	Galveston-Houston, TX	\$5,573	\$502	\$60.33	\$1.64	0	
	Northwest KS	Galveston-Houston, TX	\$3,912	\$390	\$42.72	\$1.16	3	
	Amarillo, TX	Los Angeles, CA	\$4,112	\$543	\$46.22	\$1.26	3	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,110	\$402	\$34.88	\$0.95	2	
	Toledo, OH	Raleigh, NC	\$4,508	\$450	\$49.24	\$1.34	2	
	Des Moines, IA	Davenport, IA	\$2,006	\$85	\$20.77	\$0.57	3	
	Indianapolis, IN	Atlanta, GA	\$3,920	\$338	\$42.28	\$1.15	2	
	Indianapolis, IN	Knoxville, TN	\$3,354	\$217	\$35.46	\$0.97	2	
Soybeans	Des Moines, IA	Little Rock, AR	\$3,154	\$250	\$33.81	\$0.92	2	
	Des Moines, IA	Los Angeles, CA	\$5,065	\$729	\$57.54	\$1.57	1	
	Minneapolis, MN	New Orleans, LA	\$3,299	\$439	\$37.12	\$1.01	-1	
	Toledo, OH	Huntsville, AL	\$3,575	\$320	\$38.68	\$1.05	2	
	Indianapolis, IN	Raleigh, NC	\$4,578	\$453	\$49.96	\$1.36	2	
Shuttle Train	Indianapolis, IN	Huntsville, AL	\$3,267	\$217	\$34.60	\$0.94	2	
	Champaign-Urbana, IL	New Orleans, LA	\$3,599	\$402	\$39.74	\$1.08	5	
	Wheat	Great Falls, MT	Portland, OR	\$3,580	\$352	\$39.05	\$1.06	6
	Wichita, KS	Galveston-Houston, TX	\$3,634	\$274	\$38.81	\$1.06	11	
	Chicago, IL	Albany, NY	\$3,771	\$422	\$41.64	\$1.13	3	
	Grand Forks, ND	Portland, OR	\$5,061	\$608	\$56.30	\$1.53	4	
	Grand Forks, ND	Galveston-Houston, TX	\$6,082	\$633	\$66.69	\$1.81	3	
	Northwest KS	Portland, OR	\$4,880	\$640	\$54.81	\$1.49	3	
	Corn	Minneapolis, MN	Portland, OR	\$4,800	\$740	\$55.02	\$1.50	0
		Sioux Falls, SD	Tacoma, WA	\$4,760	\$678	\$54.00	\$1.47	0
		Champaign-Urbana, IL	New Orleans, LA	\$2,929	\$402	\$33.08	\$0.90	2
		Lincoln, NE	Galveston-Houston, TX	\$3,310	\$395	\$36.79	\$1.00	0
		Des Moines, IA	Amarillo, TX	\$3,510	\$315	\$37.98	\$1.03	2
	Soybeans	Minneapolis, MN	Tacoma, WA	\$4,800	\$734	\$54.96	\$1.50	0
		Council Bluffs, IA	Stockton, CA	\$4,200	\$760	\$49.25	\$1.34	0
		Sioux Falls, SD	Tacoma, WA	\$5,320	\$678	\$59.56	\$1.62	5
Minneapolis, MN		Portland, OR	\$5,330	\$740	\$60.28	\$1.64	5	
Fargo, ND		Tacoma, WA	\$5,230	\$603	\$57.92	\$1.58	5	
Council Bluffs, IA		New Orleans, LA	\$3,500	\$464	\$39.36	\$1.07	-5	
Toledo, OH		Huntsville, AL	\$2,750	\$320	\$30.48	\$0.83	2	
Grand Island, NE	Portland, OR	\$4,800	\$655	\$54.17	\$1.47	-6		

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	\$643	\$70.55	\$1.92	-18
	OK	Cuautitlan, EM	\$6,552	\$781	\$74.93	\$2.04	-4
	KS	Guadalajara, JA	\$7,444	\$755	\$83.77	\$2.28	0
	TX	Salinas Victoria, NL	\$3,553	\$294	\$39.31	\$1.07	-4
Corn	IA	Guadalajara, JA	\$7,699	\$888	\$87.73	\$2.23	0
	SD	Celaya, GJ ⁵	\$7,356	\$842	\$83.76	\$2.13	n/a
	NE	Queretaro, QA	\$7,153	\$788	\$81.15	\$2.06	1
	SD	Salinas Victoria, NL	\$5,700	\$640	\$64.78	\$1.64	1
	MO	Tlalnepantla, EM	\$6,592	\$766	\$75.18	\$1.91	1
	SD	Torreon, CU	\$6,522	\$705	\$73.84	\$1.87	0
Soybeans	MO	Bojay (Tula), HG	\$7,580	\$749	\$85.10	\$2.31	7
	NE	Guadalajara, JA	\$8,134	\$856	\$91.86	\$2.50	2
	IA	El Castillo, JA	\$8,555	\$836	\$95.96	\$2.61	3
	KS	Torreon, CU	\$6,651	\$531	\$73.39	\$2.00	3
Sorghum	TX	Guadalajara, JA	\$6,464	\$548	\$71.64	\$1.82	-3
	NE	Celaya, GJ ⁵	\$6,997	\$764	\$79.29	\$2.01	n/a
	KS	Queretaro, QA	\$6,815	\$480	\$74.53	\$1.89	5
	NE	Salinas Victoria, NL	\$5,438	\$562	\$61.30	\$1.56	5
	NE	Torreon, CU	\$6,153	\$627	\$69.28	\$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

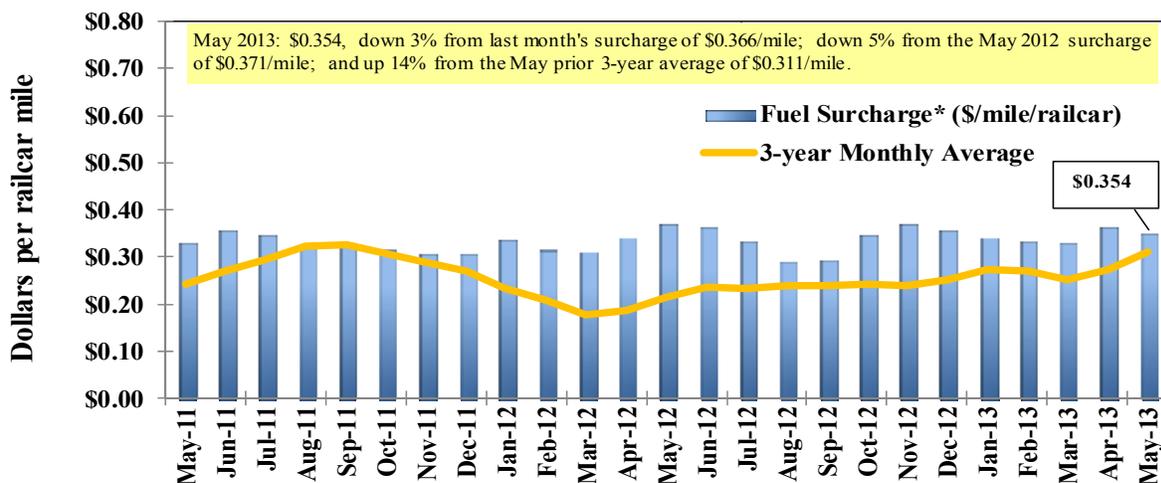
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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.

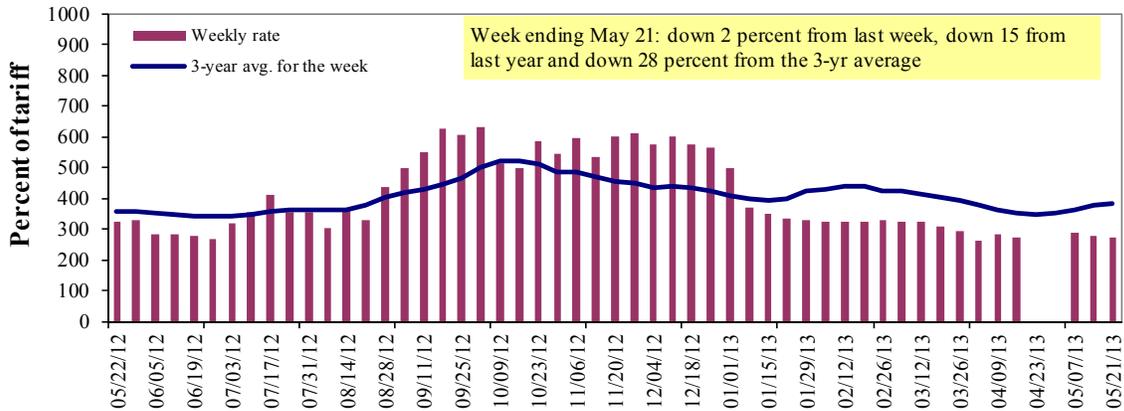
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

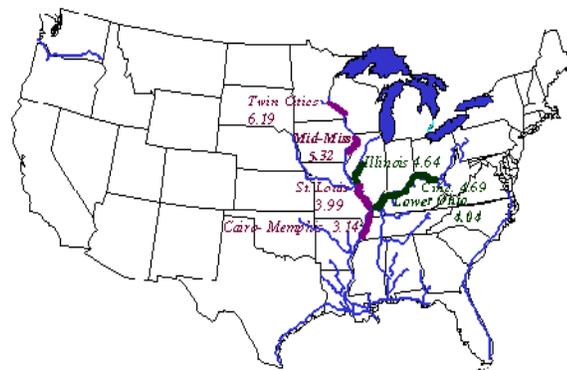
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	5/21/2013	343	287	273	218	190	190	180
	5/14/2013	363	290	278	220	190	190	178
\$/ton	5/21/2013	21.23	15.27	12.67	8.70	8.91	7.68	5.65
	5/14/2013	22.47	15.43	12.90	8.78	8.91	7.68	5.59
Current week % change from the same week:								
	Last year	-19	-18	-15	-10	-31	-31	-14
	3-year avg. ²	-25	-27	-28	-21	-42	-42	-19
Rate¹	June	335	283	270	220	200	200	187
	August	397	367	348	322	342	342	292

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

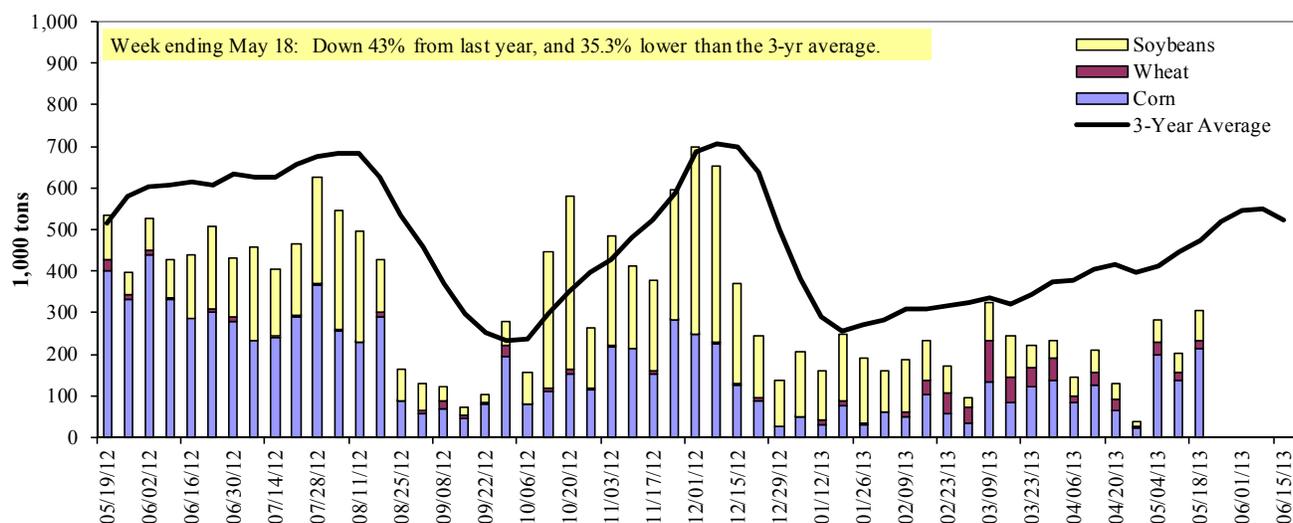


Calculating barge rate per ton:

(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 5/18/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	103	13	15	0	130
Winfield, MO (L25)	81	2	31	0	114
Alton, IL (L26)	218	17	52	0	287
Granite City, IL (L27)	215	19	72	0	306
Illinois River (L8)	46	13	21	0	79
Ohio River (L52)	32	12	10	2	56
Arkansas River (L1)	0	22	0	0	22
Weekly total - 2013	247	52	83	2	384
Weekly total - 2012	468	39	128	8	644
2013 YTD ¹	2,768	1,526	3,427	106	7,828
2012 YTD	7,211	720	4,309	134	12,374
2013 as % of 2012 YTD	38	212	80	80	63
Last 4 weeks as % of 2012 ²	51	44	45	60	54
Total 2012	14,837	1,794	12,663	229	29,523

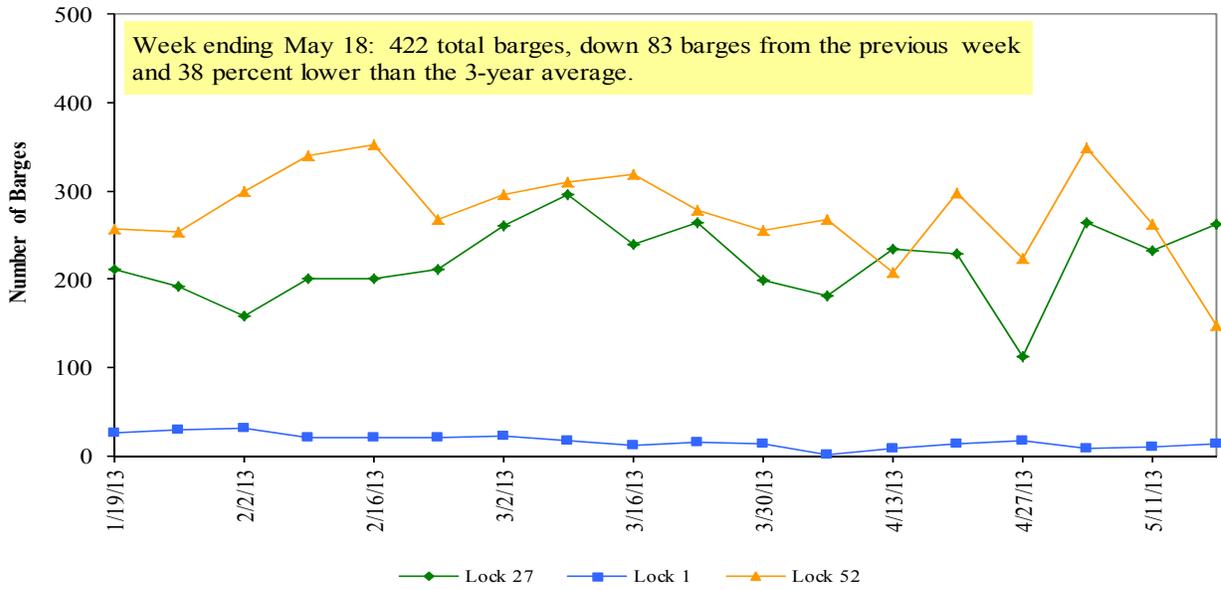
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2012.

Note: Total may not add exactly, due to rounding

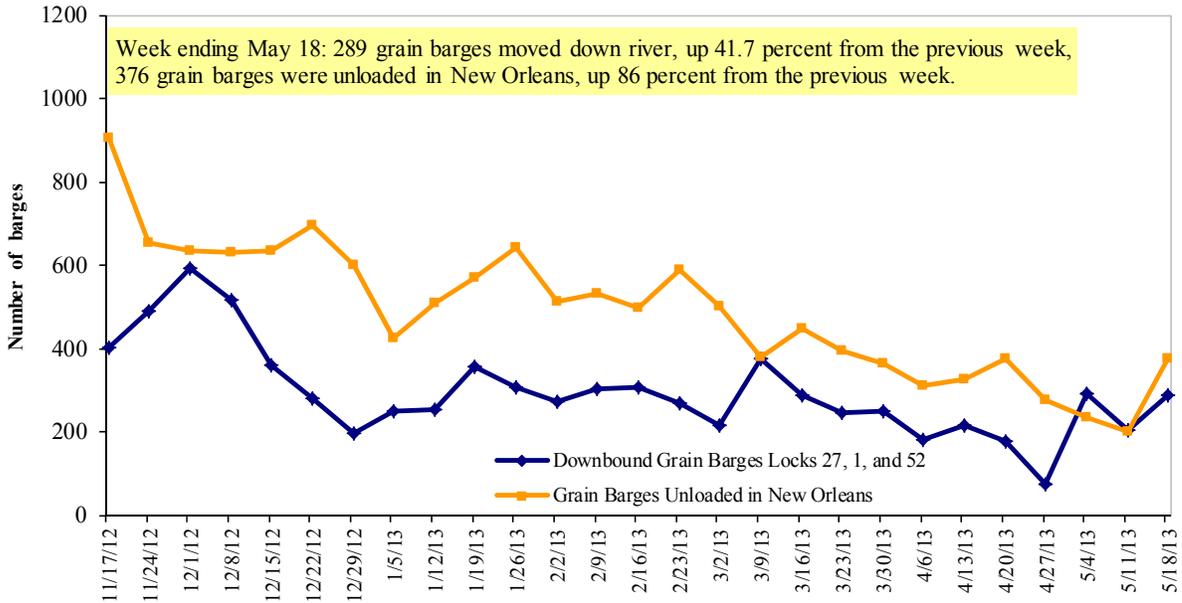
Source: U.S. Army Corps of Engineers

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 5/20/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.871	0.006	-0.128
	New England	3.991	-0.004	-0.139
	Central Atlantic	3.925	0.015	-0.154
	Lower Atlantic	3.809	0.002	-0.107
II	Midwest ²	3.934	0.025	0.080
III	Gulf Coast ³	3.775	0.036	-0.086
IV	Rocky Mountain	3.848	0.026	-0.139
V	West Coast	4.008	0.039	-0.225
	West Coast less California	3.932	0.049	-0.220
	California	4.072	0.030	-0.231
Total	U.S.	3.890	0.024	-0.066

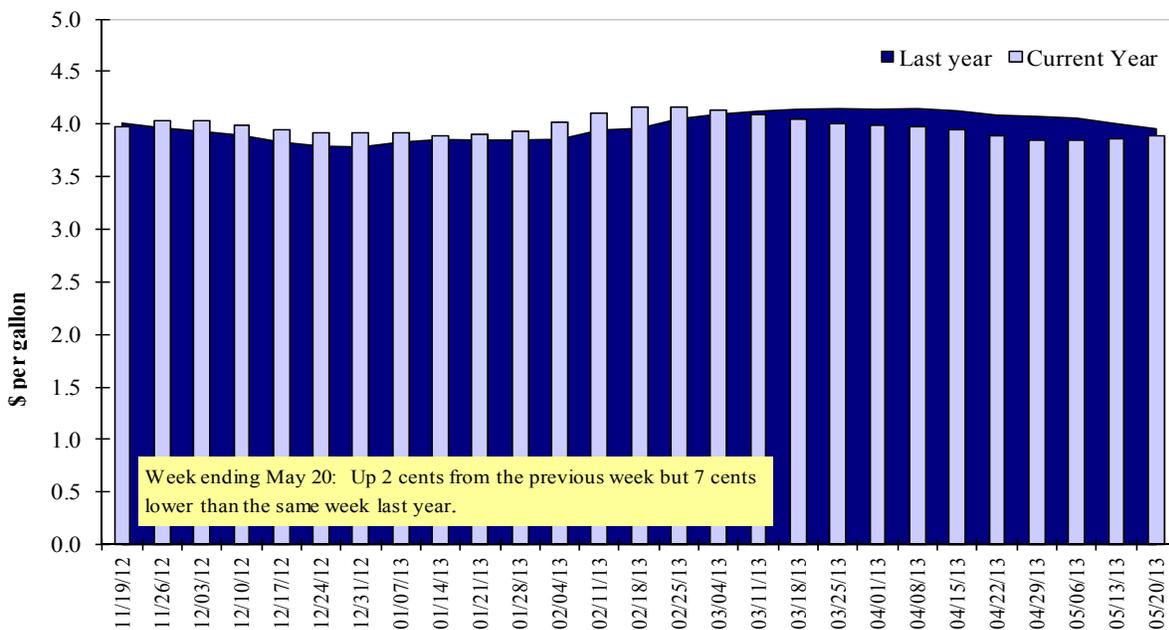
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
5/9/2013	1,171	553	383	158	62	2,326	4,074	1,959	8,359
This week year ago	977	480	888	550	47	2,942	9,364	5,111	17,417
Cumulative exports-marketing year²									
2012/13 YTD	9,150	4,795	5,625	4,472	489	24,530	13,012	34,539	72,081
2011/12 YTD	9,271	3,900	5,933	5,329	452	24,885	28,503	29,989	83,377
YTD 2012/13 as % of 2011/12	99	123	95	84	108	99	46	115	86
Last 4 wks as % of same period 2011/12	147	149	66	51	170	105	45	43	54
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 05/09/2013	Total Commitments ²			% change current MY from last MY	Exports ³ 2011/12
	2013/14 Next MY	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -				- 1,000 mt -
Japan	775	6,062	10,819	(44)	12,367
Mexico	809	4,060	9,290	(56)	9,617
China	800	2,474	4,536	(45)	5,414
Korea	2	360	3,787	(91)	3,639
Venezuela	0	698	914	(24)	1,332
Top 5 Importers	2,385	13,655	29,346	(53)	32,369
Total US corn export sales	3,663	17,086	37,867	(55)	39,180
% of Projected	11%	90%	97%		
Change from prior week	39	220	340		
Top 5 importers' share of U.S. corn export sales	65%	80%	77%		83%
USDA forecast, May 2013	33,020	19,050	39,180	(51)	
Corn Use for Ethanol USDA forecast, Ethanol May 2013	123,190	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 05/09/2013	Total Commitments ²			% change current MY from last MY	Exports ³ 2011/12
	2013/14 Next MY	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -				- 1,000 mt -
China	7,406	21,800	22,095	(1)	24,602
Mexico	56	2,438	2,934	(17)	3,180
Japan	131	1,614	1,666	(3)	1,891
Indonesia	8	1,421	1,354	5	1,741
Egypt	0	677	926	(27)	1,292
Top 5 importers	7,600	27,951	28,975	(4)	32,706
Total US soybean export sales	8,860	36,498	35,100	4	37,060
% of Projected	22%	99%	95%		
Change from prior week	347	15	616		
Top 5 importers' share of U.S. soybean export sales	86%	77%	83%		
USDA forecast, May 2013	39,460	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/³FAS 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 05/09/2013	Total Commitments ²			% change current MY from last MY	Exports ³ 2011/12
	2013/14 Next MY	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -				- 1,000 mt -
Japan	135	3,629	3,762	(4)	3,512
Mexico	488	2,824	3,518	(20)	3,496
Nigeria	156	2,983	3,305	(10)	3,248
Philippines	222	1,945	2,084	(7)	2,039
Korea	80	1,402	2,080	(33)	1,983
Egypt	0	1,678	1,000	68	950
Taiwan	38	1,036	1,014	2	888
Indonesia	0	534	828	(36)	830
Venezuela	72	632	659	(4)	594
Iraq	0	209	572	(63)	572
Top 10 importers	1,191	16,871	18,822	(10)	18,111
Total US wheat export sales	4,115	26,856	27,827	(3)	28,560
% of Projected	16%	96%	97%		
Change from prior week	416	88	322		
Top 10 importers' share of U.S. wheat export sales	29%	63%	68%		63%
USDA forecast, May 2013	25,170	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/³FAS 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 05/16/13	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	84	219	39	4,824	5,609	86	56	58	12,625
Corn	60	0	n/a	1,254	2,705	46	10	7	5,512
Soybeans	13	0	n/a	3,696	4,386	84	28	64	10,347
Total	156	219	71	9,774	12,701	77	39	41	28,484
Mississippi Gulf									
Wheat	127	130	98	3,409	2,601	131	101	129	5,462
Corn	216	260	83	4,175	8,599	49	59	45	18,068
Soybeans	36	14	255	6,737	8,444	80	25	35	24,684
Total	379	404	94	14,321	19,644	73	58	57	48,215
Texas Gulf									
Wheat	229	225	102	2,828	1,998	142	154	103	5,912
Corn	29	0	n/a	101	279	36	142	58	336
Soybeans	0	0	n/a	122	0	n/a	n/a	0	626
Total	258	225	115	3,051	2,277	134	153	98	6,874
Interior									
Wheat	19	23	82	351	503	70	82	104	1,218
Corn	65	58	113	1,036	3,499	30	94	33	6,115
Soybeans	33	54	60	1,525	1,766	86	41	61	4,204
Total	117	135	86	2,913	5,768	50	73	46	11,538
Great Lakes									
Wheat	56	57	99	345	45	761	1,187	230	481
Corn	0	0	n/a	0	30	0	n/a	0	56
Soybeans	0	0	n/a	4	42	9	0	0	713
Total	56	57	99	348	117	298	396	187	1,250
Atlantic									
Wheat	61	0	n/a	366	88	416	80	103	341
Corn	0	0	n/a	2	76	3	0	0	143
Soybeans	10	10	95	676	458	148	131	159	1,460
Total	70	10	691	1,044	621	168	82	87	1,944
U.S. total from ports²									
Wheat	576	654	88	12,123	10,845	112	94	90	26,040
Corn	370	318	117	6,569	15,188	43	41	33	30,230
Soybeans	91	79	115	12,760	15,096	85	33	50	42,035
Total	1,037	1,050	99	31,452	41,128	76	59	58	98,305

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

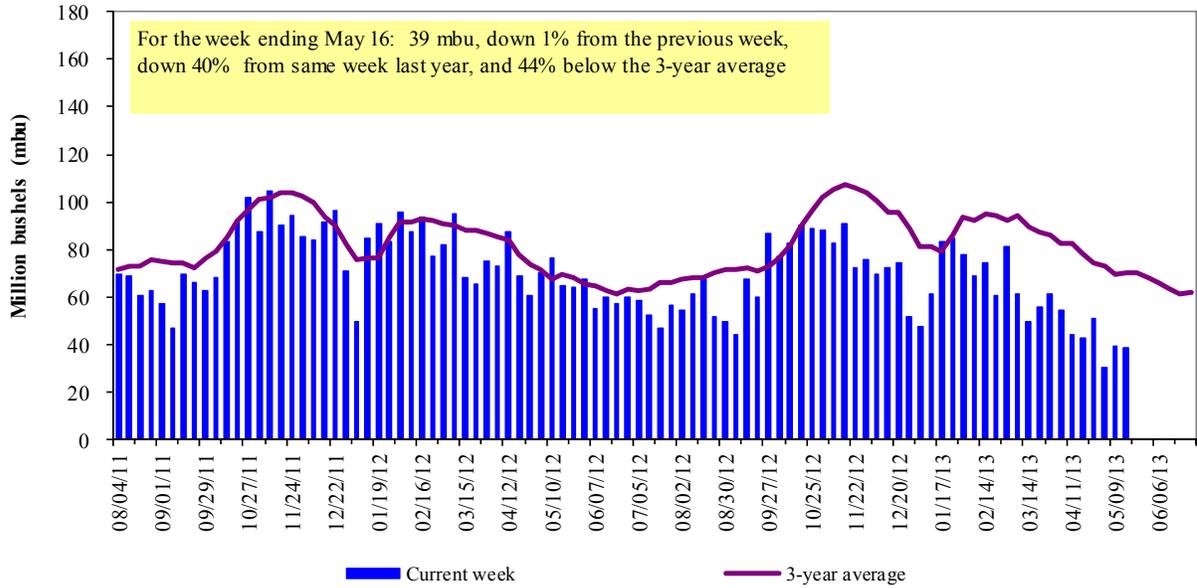
² Total includes only port regions shown above; Interior land-based shipments now included.

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)

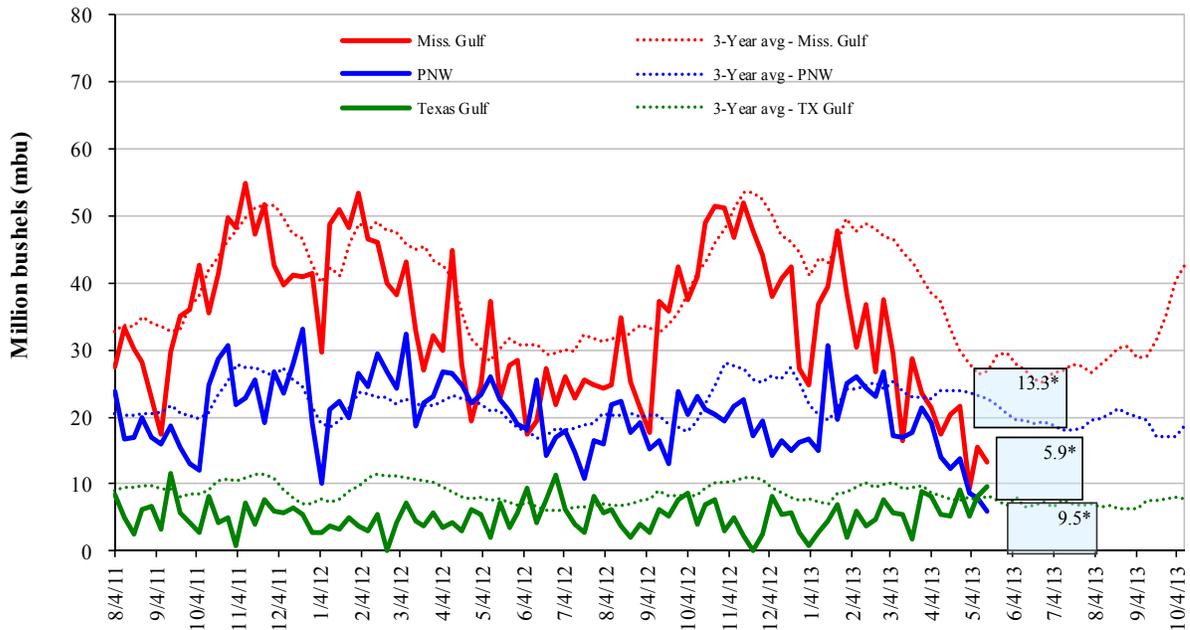


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

May 16 % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	down 14	up 16	down 4	down 27
Last year (same week)	down 42	up 31	down 24	down 74
3-yr avg (4-wk mov. avg)	down 51	up 16	down 35	down 73

Ocean Transportation

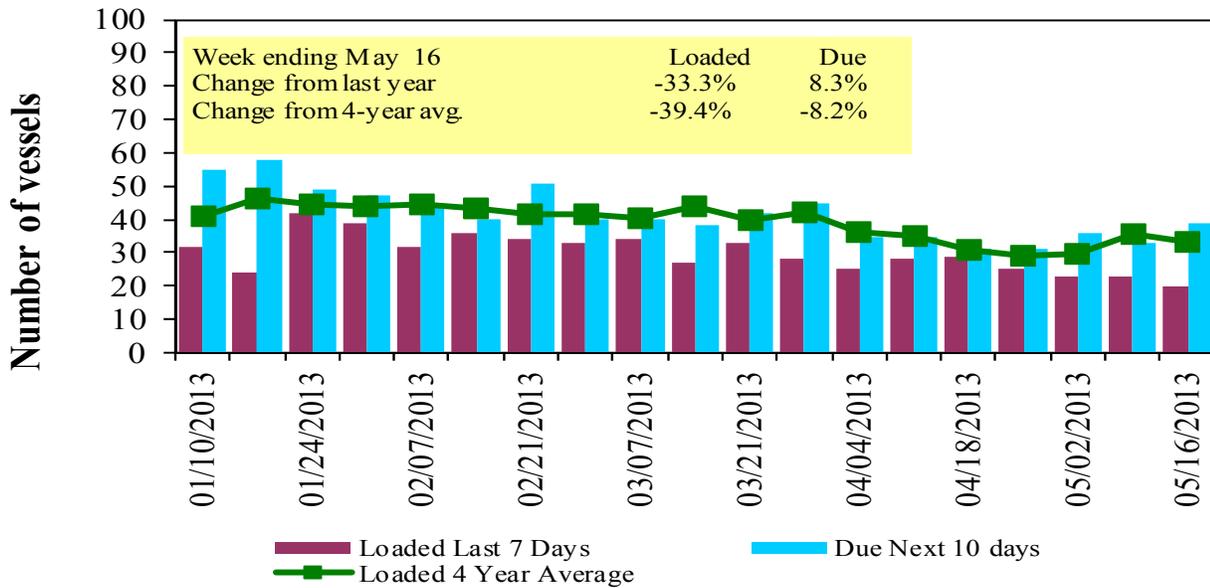
Table 17

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
5/16/2013	30	20	39	3	n/a
5/9/2013	25	23	33	2	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

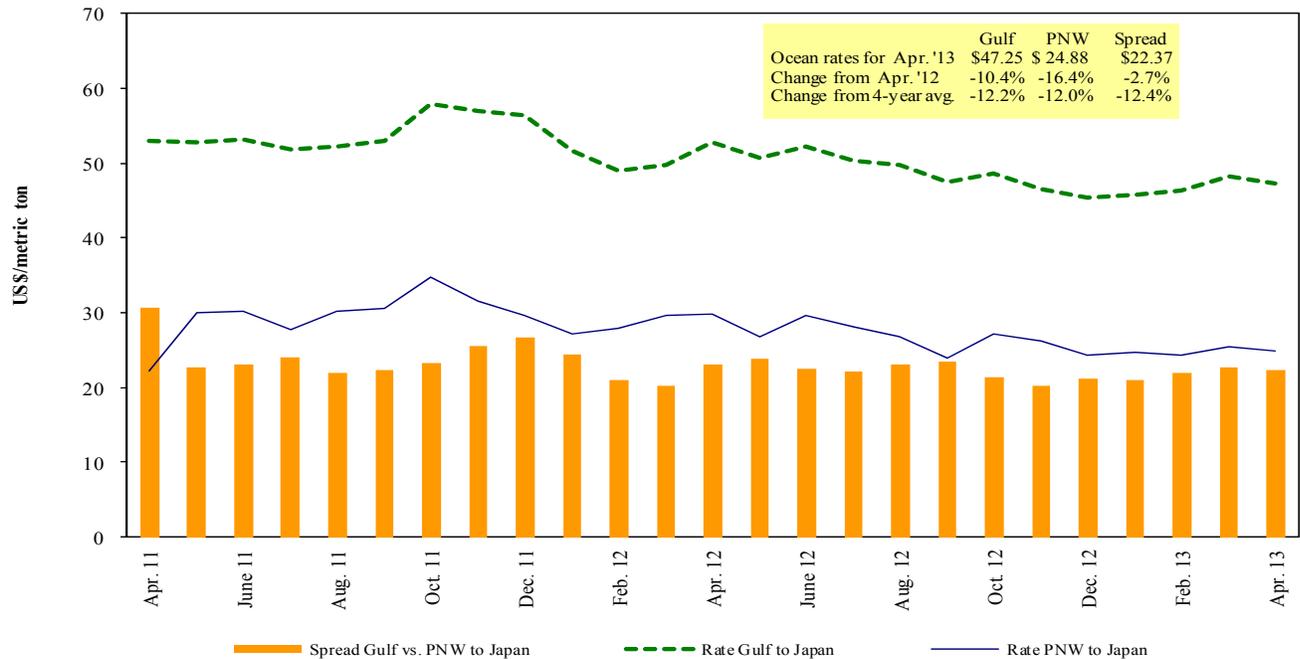
Figure 16
U.S. Gulf^d Vessel Loading Activity



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 05/18/2013

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	Jul 20/30	60,000	34.50
Brazil	China	Heavy Grain	Jul 1/30	65,000	36.00
Brazil	China	Heavy Grain	Jun 1/10	60,000	36.00
Brazil	China	Heavy Grain	May 20/29	65,000	36.00
Brazil	China	Heavy Grain	May 1/10	60,000	38.00
Brazi	China	Heavy Grain	May 1/5	60,000	35.35
France	Algeria	Wheat	Apr 15/25	30,000	18.75
River Plate	Philippines	Soybean Meals	Jun 1/10	40,000	50.00
River Plate	Egypt	Heavy Grain	May 1/10	45,000	40.00
River Plate	Egypt Med	Heavy Grain	Apr 8/12	60,000	32.00

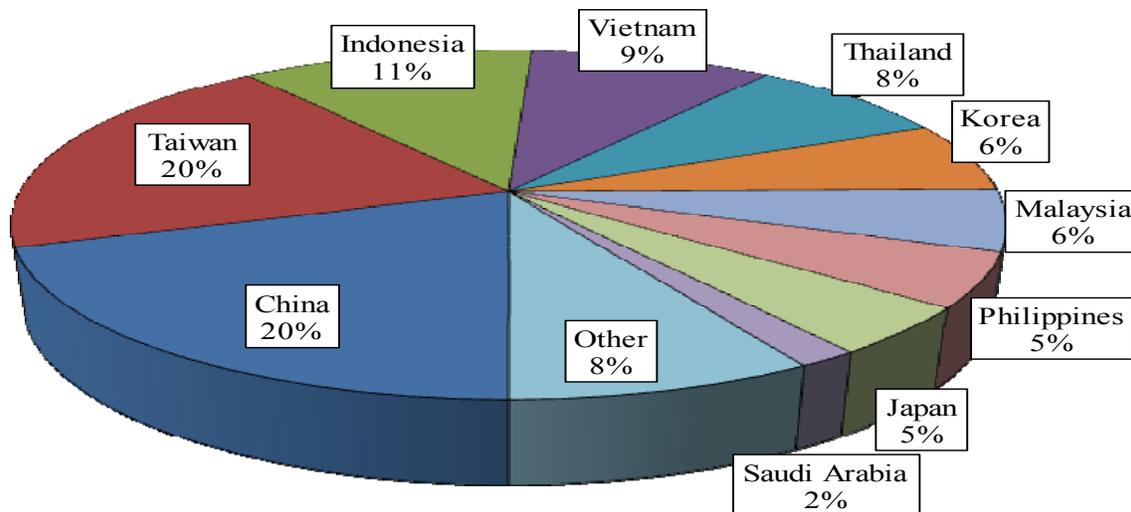
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

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.

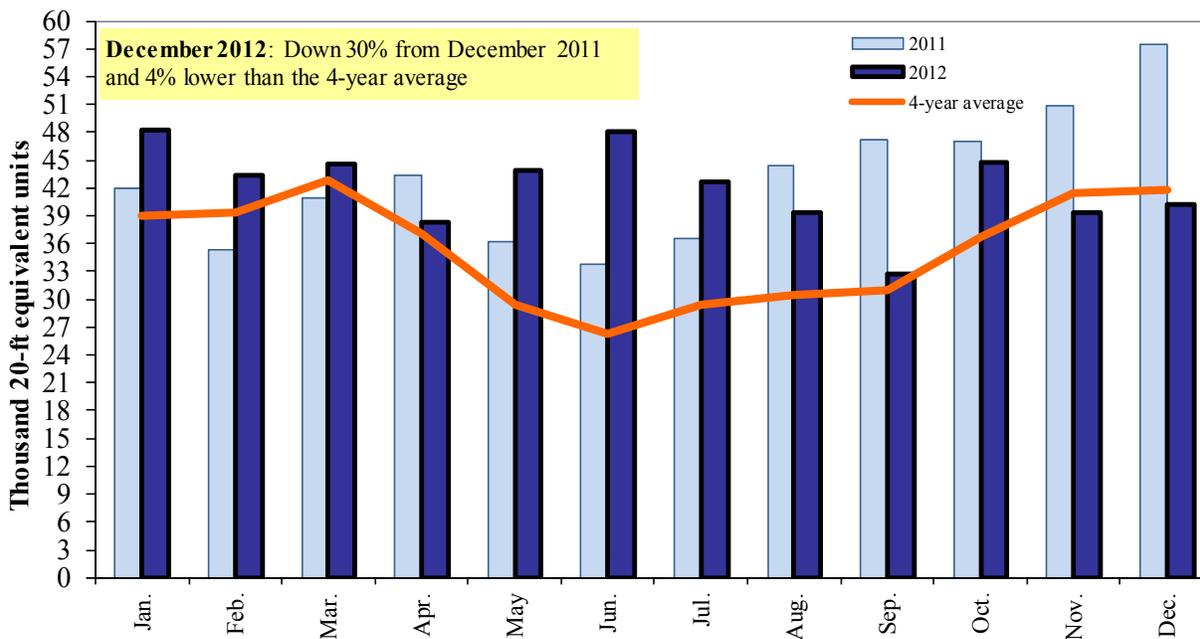
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, December 2012



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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