



Grain Transportation Report

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

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July 31, 2014

WEEKLY HIGHLIGHTS

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Pacific Northwest Inspections Continue to Increase

For the week ending July 24, total inspections of grain (corn, wheat, and soybeans) from the Pacific Northwest reached .510 million metric tons (mmt), up 12 percent from the previous week and 18 percent above the same time last year. So far, inspections of grain in the PNW have continued to increase despite a temporary end to grain inspections at the Port of Vancouver, in the state of Washington, over two weeks ago. Total inspections of grain from all major export regions reached 1.29 mmt, down 17 percent from the past week, up 31 percent from last year, but 5 percent below the 3- year average. Wheat and corn inspections dropped 25 and 15 percent from the previous week primarily to Latin America. Soybean inspections, however, increased 17 percent from the past week as shipments to Mexico rose. Soybeans inspections increased 24 percent from the past week in the Mississippi Gulf. During the week ending July 17, new crop **soybean** and **corn** export sales increased significantly.

Shoaling Stops Minneapolis–St. Paul Barge Traffic

Recent flooding has resulted in large amounts of sediment creating navigation hazards that have stopped barge traffic on the northernmost section of the Upper Mississippi River. The U.S. Army Corps of Engineers (Corps) has begun emergency dredging operations to remove the shoaling while coordinating with navigation industry officials and the U.S. Coast Guard to reopen the channel as soon as possible. While the dredging operations are underway, the affected areas will be closed to commercial navigation. At present, there is significant shoaling between Wabasha, MN, and Alma, WI, near Lock 4. Dredging operations are underway there, and the Corps anticipates reopening that location by August 10. In addition, the Corps is dredging at Winona, MN, near Lock 6, and expects to reopen that location by August 8. There are several other locations that have depths less than the required 9 feet and will need to be dredged. The closures will stop barge traffic between Minneapolis-St. Paul and the rest of the Mississippi River System.

Slight Increase in Weekly Barge Rates

As of July 29, barge rates for export grain from St. Louis and the Lower Illinois River were \$16.28 and \$25.98 per ton, respectively. This represents a slight weekly increase compared to rates reported on July 22, when rates for St. Louis had a 41 percent weekly increase and the Lower Illinois River rates increased 35 percent. The July 22 increase was due to the reopening of the river after 3 weeks of flood-related closures. A significant return of empty barges was reported at St. Louis and the Illinois River, which increased barge availability and stabilized the barge rate increase. However, the current closure of the Upper Mississippi River where dredging operations are underway will reduce the supply of empties to Minneapolis-St. Paul area and could put pressure on barge rates again when the river reopens.

Snapshots by Sector

Rail

U.S. railroads originated 20,505 **carloads of grain** during the week ending July 19, up 20 percent from last week, 27 percent from last year, and 15 percent from the 3-year average.

During the week ending July 24, average August non-shuttle **secondary railcar bids/offers per car** were \$1,100 above tariff, up \$350 from last week and \$1,096 higher than last year. Average shuttle secondary railcar bids/offers per car were \$2,466.50 above tariff, up \$697.50 from last week and \$2,604.50 higher than last year.

Barge

During the week ending July 26 **barge grain movements** totaled 785,701 tons—85.6 percent higher than the previous week and 78 percent higher than the same period last year.

During the week ending July 26, 499 grain barges **moved down river**, up 87 percent from last week; 407 grain barges were **unloaded in New Orleans**, down 11.7 percent from the previous week.

Ocean

During the week ending July 24, 26 **ocean-going grain vessels** were loaded in the Gulf, 30 percent more than the same period last year. Forty-one vessels are expected to be loaded within the next 10 days, 11 percent less than the same period last year.

During the week ending July 25, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$42.00 per mt, down 1 percent from the previous week. The cost of shipping from the PNW to Japan was \$23.25 per mt, down 1 percent from the previous week.

Fuel

During the week ending July 28, U.S. average **diesel fuel prices** decreased 1 cent from the previous week to \$3.86 per gallon—down 6 cents from the same week last year.

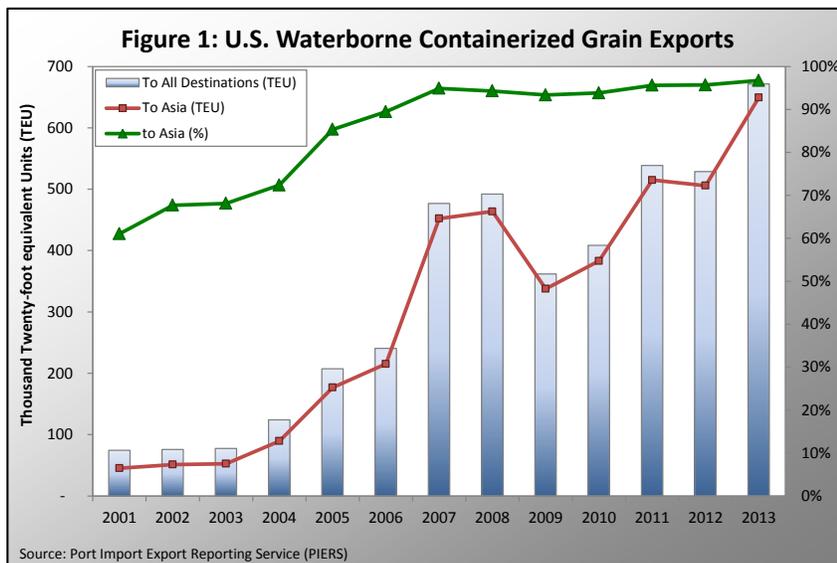
Feature Article/Calendar

Containerized Grain—A Historical Perspective

Over the past decade, containers have become an important form of transportation for grain exporters. In 2013, containerized grain exports jumped 27 percent over the previous year and represented a record 10 percent of waterborne grain exports. This percentage has increased over the past 10 years, slowly at first, but increasing rapidly in the past 3 years (see table). Asia is the top export market for containerized grain. In 2013, a record 97 percent of U.S. containerized grain exports moved to Asia. At the same time, a record 16 percent of total waterborne grain exports moved in containers to Asia. The percentage of containerized grain destined for Asia has also increased over the past 10 years, starting in the low 60s in 2001, jumping to 89 percent in 2006, and remaining above 90 percent since 2007 (see figure 1 below).

U.S. Waterborne Grain Exports Moved in Containers			
Year	Containerized (Million Metric Tons (mmt))	Total (mmt)	% Containerized
2001	1,088	112,000	1%
2002	1,120	104,473	1%
2003	1,125	101,866	1%
2004	1,787	106,199	2%
2005	2,892	88,526	3%
2006	3,309	104,612	3%
2007	6,296	114,955	5%
2008	6,571	111,604	6%
2009	5,154	108,720	5%
2010	5,831	118,009	5%
2011	7,794	109,287	7%
2012	7,555	98,350	8%
2013	9,363	92,696	10%

The recession caused a dip in overall volumes starting at the end of 2008 and into 2009 (see figure 1 below), but containerized grain exports hit record levels in 2011 and particularly in 2013. It is interesting to note that despite the annual variability of containerized grain exports from 2007 to 2013 the percentage of these grains destined for Asia remained relatively flat, dipping only 1 percentage point in 2008 and again in 2009. This shows a strong demand and reliance in Asia on U.S. grains moved in containers.



The increased demand of dried distillers grains with solubles (DDGS) since 2007 due to the rapid growth in U.S. ethanol production, has contributed to the increase in containerized grain exports. DDGS are preferred by exporters to be moved in containers because they can be shipped in smaller quantities. More than 50 percent of waterborne DDGS exports have moved in containers over the past 4 years.

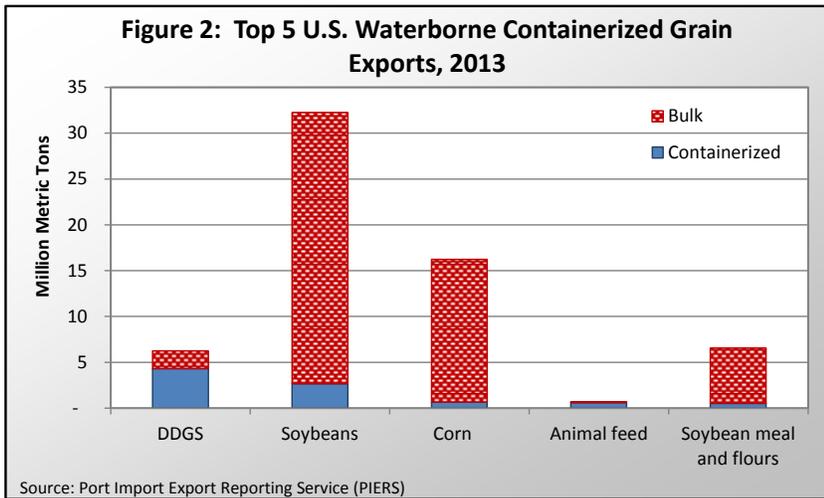
Import grain customers in general typically like containers because they offer a smaller amount of product delivered than bulk and they often provide a better quality product at destination. DDGS is often used as a supplement to animal feed in Asia, so smaller quantities moved through the supply chain in containers work well for this application because a livestock producer typically doesn't need as much quantity as some of the other feed ingredients procured.

Before the influx of DDGS to the market, soybeans were the top grain export moved in containers, particularly to Asia. In 2007, soybeans represented 37 percent of the market; by 2013, that percentage fell to 28 percent following DDGS at 46 percent. Shippers of specialty and identity-preserved soybeans, in

particular, rely on containers to provide segregation from homogeneous bulk soybeans and protection during transport.

Figure 2 displays a breakdown by type of grain transported by bulk and container in 2013. The economies of scale gained from using bulk transportation will almost always have an advantage over containerized movements of

traditional grains such as corn and soybeans. Nevertheless, as shown in Figure 2, containerized movements certainly have their place in the market for these commodities. For example, specialty products such as some identity-preserved and food-grade soybeans represented 8 percent of the market in 2013. Feed supplements such as DDGS represented nearly 70 percent of the market. Even some homogenous grain products such as corn and soybean meal



represented 7 and 6 percent of the market, probably resulting from some exporters being able to take advantage of inversed ocean freight rates which occasionally may favor containers for short periods of time. (April.Taylor@ams.usda.gov)

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			
7/23/2014 ^p	10	877	3,129	211	4,227	7/19/2014	1,942
7/16/2014 ^r	13	1,403	3,059	100	4,575	7/12/2014	2,229
2014 YTD ^r	20,454	49,044	135,486	16,504	221,488	2014 YTD	57,251
2013 YTD ^r	9,871	36,715	74,758	9,903	131,247	2013 YTD	35,423
2014 YTD as % of 2013 YTD	207	134	181	167	169	% change YTD	162
Last 4 weeks as % of 2013 ²	25	87	315	114	169	Last 4wks % 2013	137
Last 4 weeks as % of 4-year avg. ²	27	114	117	107	112	Last 4wks % 4 yr	120
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	70,298
Total 2012	22,604	40,780	199,419	24,659	287,462	Total 2012	92,008

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2013 and prior 4-year average.

³ Cross-border weekly data is approximately 15 percent below the Association of American Railroads reported weekly carloads received by Mexican railroads to reflect switching between KCSM and FerroMex.

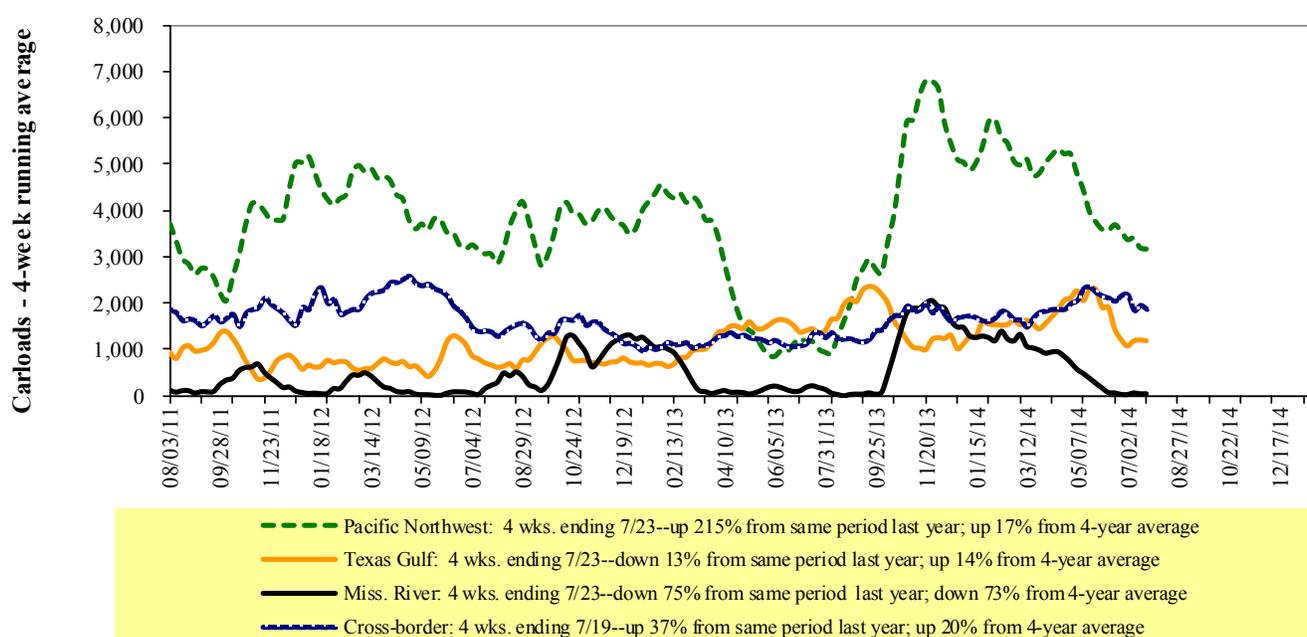
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

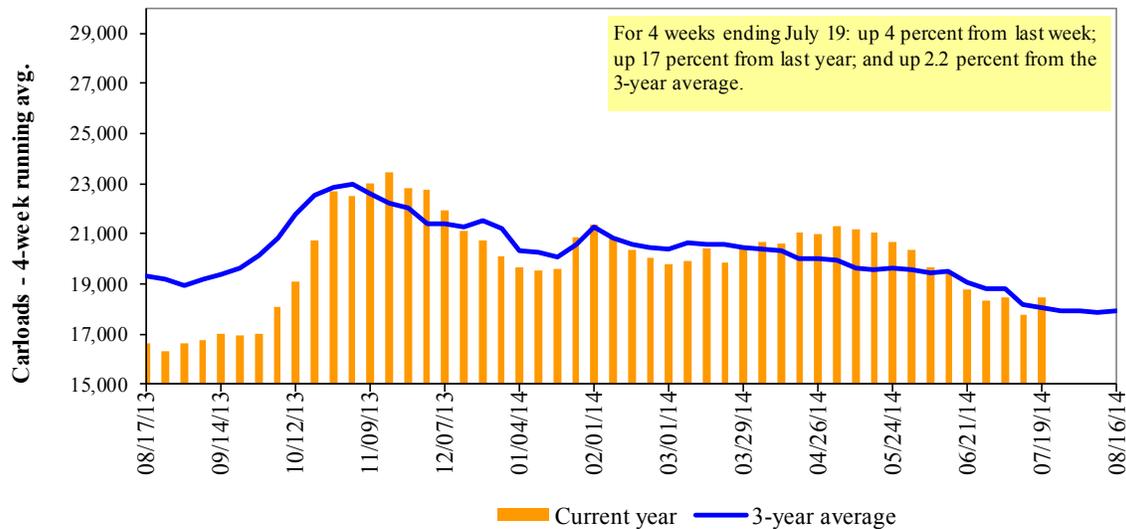
Table 4

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

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
07/19/14	1,970	2,602	8,465	622	6,846	20,505	4,193	5,611
This week last year	1,442	2,101	7,675	411	4,461	16,090	3,256	5,490
2014 YTD	54,964	85,449	250,557	25,057	164,383	580,410	126,979	152,327
2013 YTD	42,328	73,132	244,976	13,578	110,840	484,854	92,611	149,002
2014 YTD as % of 2013 YTD	130	117	102	185	148	120	137	102
Last 4 weeks as % of 2013	139	114	99	176	143	117	164	106
Last 4 weeks as % of 3-yr avg. ¹	122	102	92	142	115	103	128	107
Total 2013	86,466	137,915	454,262	34,412	222,258	935,313	190,125	272,753

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

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

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

Source: Association of American Railroads

Table 5

Railcar Auction Offerings¹ (\$/car)²

Week ending	Delivery period							
	Aug-14	Aug-13	Sep-14	Sep-13	Oct-14	Oct-13	Nov-14	Nov-13
BNSF ³								
COT grain units	no offer	0	3012	0	3300	2	2882	no offer
COT grain single-car ⁵	no offer	0 .. 1	2118 .. 2966	0 .. 1	2700 .. 3618	0	2515 .. 3105	no offer
UP ⁴								
GCAS/Region 1	602	no bids	no offer	no bids	no offer	no bids	n/a	n/a
GCAS/Region 2	1501	no bids	no offer	no bids	no offer	1	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.

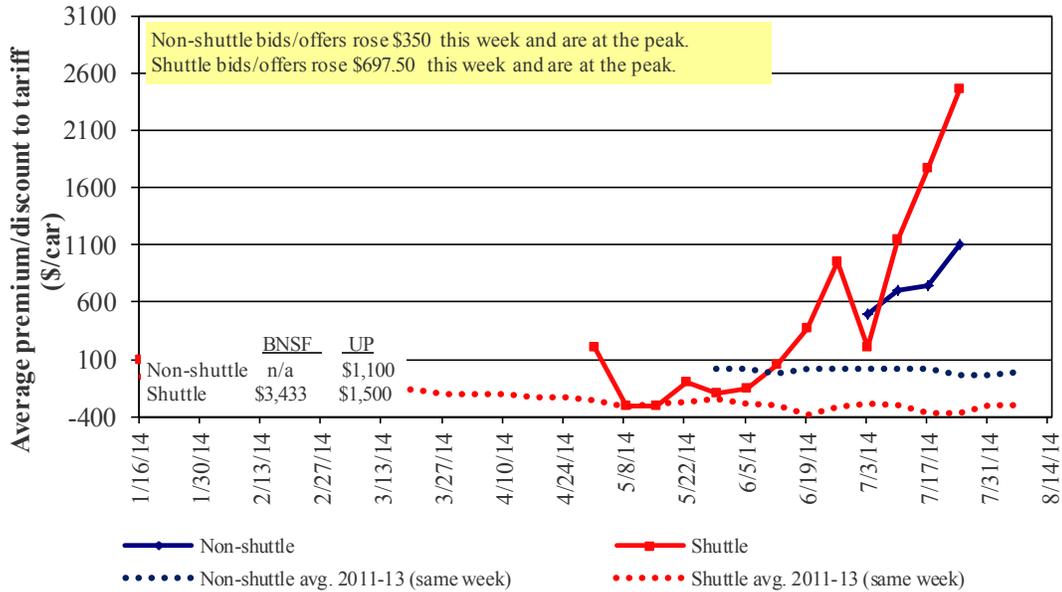
⁵Range is shown because average is not available. Not available = n/a.

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 August 2014, Secondary Market

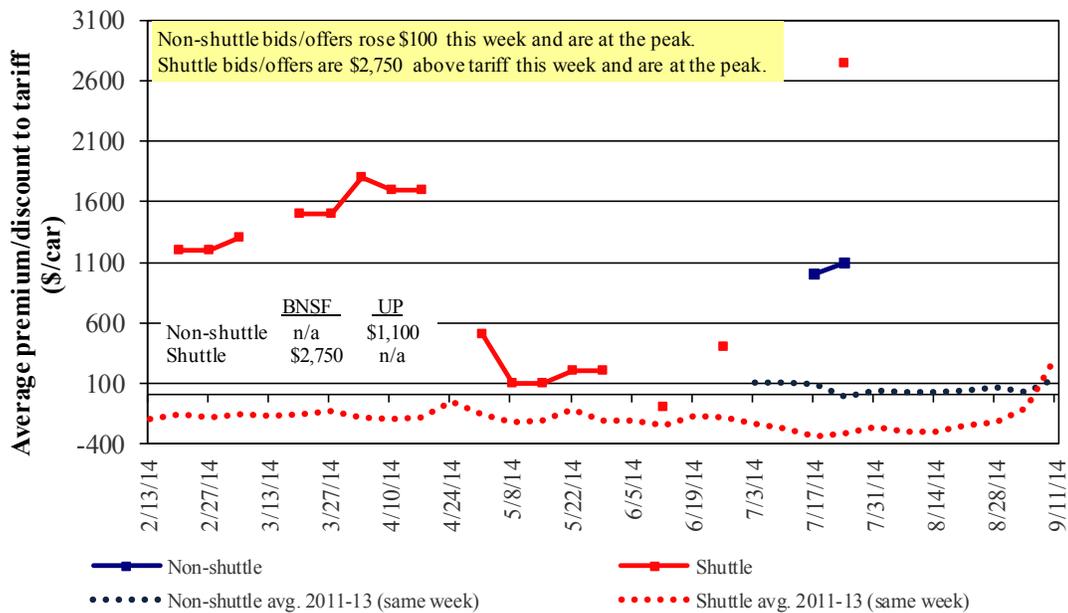


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in September 2014, Secondary Market

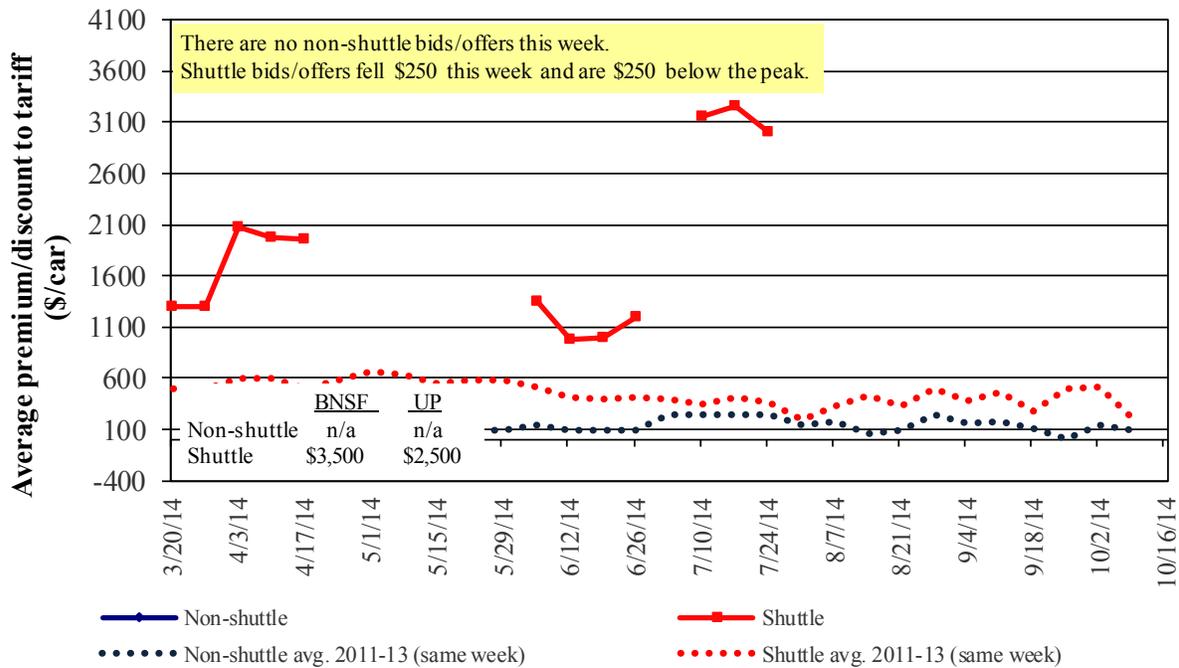


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in October 2014, 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					
	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Jan-15
Non-shuttle						
BNSF-GF	n/a	n/a	n/a	n/a	n/a	n/a
Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
Change from same week 2013	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	1,100	1,100	n/a	n/a	n/a	n/a
Change from last week	350	100	n/a	n/a	n/a	n/a
Change from same week 2013	1,100	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	3,433	2,750	3,500	n/a	2,500	n/a
Change from last week	1,433	n/a	-	n/a	n/a	n/a
Change from same week 2013	3,496	n/a	n/a	n/a	n/a	n/a
UP-Pool	1,500	n/a	2,500	2,000	1,000	n/a
Change from last week	(38)	n/a	(500)	n/a	200	n/a
Change from same week 2013	1,713	n/a	1,975	n/a	n/a	n/a

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

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

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

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

Effective date:			Tariff	Fuel	Tariff plus surcharge per:		Percent
7/1/2014	Origin region*	Destination region*	rate/car	surcharge per car	metric ton	bushe ^l ²	change Y/Y ³
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,387	\$187	\$35.49	\$0.97	6
	Grand Forks, ND	Duluth-Superior, MN	\$3,596	\$110	\$36.80	\$1.00	2
	Wichita, KS	Los Angeles, CA	\$6,244	\$566	\$67.63	\$1.84	0
	Wichita, KS	New Orleans, LA	\$4,026	\$329	\$43.25	\$1.18	5
	Sioux Falls, SD	Galveston-Houston, TX	\$5,824	\$465	\$62.45	\$1.70	0
	Northwest KS	Galveston-Houston, TX	\$4,293	\$361	\$46.21	\$1.26	5
	Amarillo, TX	Los Angeles, CA	\$4,492	\$502	\$49.59	\$1.35	5
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,192	\$372	\$35.39	\$0.90	3
	Toledo, OH	Raleigh, NC	\$4,686	\$424	\$50.75	\$1.29	4
	Des Moines, IA	Davenport, IA	\$2,078	\$79	\$21.42	\$0.54	4
	Indianapolis, IN	Atlanta, GA	\$4,061	\$319	\$43.49	\$1.10	4
	Indianapolis, IN	Knoxville, TN	\$3,469	\$204	\$36.48	\$0.93	3
	Des Moines, IA	Little Rock, AR	\$3,218	\$232	\$34.26	\$0.87	2
	Des Moines, IA	Los Angeles, CA	\$5,215	\$675	\$58.49	\$1.49	3
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,434	\$410	\$38.17	\$1.04	3
	Toledo, OH	Huntsville, AL	\$3,687	\$301	\$39.61	\$1.08	3
	Indianapolis, IN	Raleigh, NC	\$4,756	\$427	\$51.47	\$1.40	4
	Indianapolis, IN	Huntsville, AL	\$3,379	\$204	\$35.58	\$0.97	3
	Champaign-Urbana, IL	New Orleans, LA	\$3,748	\$372	\$40.92	\$1.11	4
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,678	\$326	\$39.76	\$1.08	3
	Wichita, KS	Galveston-Houston, TX	\$3,471	\$253	\$36.99	\$1.01	-8
	Chicago, IL	Albany, NY	\$3,950	\$398	\$43.18	\$1.18	5
	Grand Forks, ND	Portland, OR	\$5,159	\$562	\$56.82	\$1.55	2
	Grand Forks, ND	Galveston-Houston, TX	\$6,084	\$586	\$66.23	\$1.80	1
	Northwest KS	Portland, OR	\$5,260	\$592	\$58.11	\$1.58	4
	Minneapolis, MN	Portland, OR	\$5,000	\$685	\$56.45	\$1.43	4
Corn	Sioux Falls, SD	Tacoma, WA	\$4,960	\$627	\$55.48	\$1.41	4
	Champaign-Urbana, IL	New Orleans, LA	\$3,011	\$372	\$33.60	\$0.85	3
	Lincoln, NE	Galveston-Houston, TX	\$3,510	\$366	\$38.49	\$0.98	6
	Des Moines, IA	Amarillo, TX	\$3,590	\$291	\$38.54	\$0.98	2
	Minneapolis, MN	Tacoma, WA	\$5,000	\$679	\$56.40	\$1.43	4
	Council Bluffs, IA	Stockton, CA	\$4,400	\$703	\$50.67	\$1.29	5
	Sioux Falls, SD	Tacoma, WA	\$5,520	\$627	\$61.04	\$1.66	4
Soybeans	Minneapolis, MN	Portland, OR	\$5,530	\$685	\$61.72	\$1.68	4
	Fargo, ND	Tacoma, WA	\$5,430	\$558	\$59.46	\$1.62	4
	Council Bluffs, IA	New Orleans, LA	\$4,175	\$429	\$45.72	\$1.24	5
	Toledo, OH	Huntsville, AL	\$2,862	\$301	\$31.41	\$0.85	4
	Grand Island, NE	Portland, OR	\$5,110	\$606	\$56.76	\$1.54	3

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

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

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

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

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

Table 8

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

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	\$6,460	\$595	\$72.09	\$1.96	3
	OK	Cuautitlan, EM	\$6,315	\$723	\$71.90	\$1.95	-5
	KS	Guadalajara, JA	\$6,899	\$698	\$77.63	\$2.11	-15
	TX	Salinas Victoria, NL	\$3,798	\$272	\$41.59	\$1.13	30
Corn	IA	Guadalajara, JA	\$7,974	\$821	\$89.86	\$2.28	4
	SD	Celaya, GJ	\$7,656	\$778	\$86.18	\$2.19	4
	NE	Queretaro, QA	\$7,353	\$729	\$82.59	\$2.10	3
	SD	Salinas Victoria, NL	\$5,880	\$592	\$66.12	\$1.68	3
	MO	Tlalnepantla, EM	\$6,712	\$709	\$75.82	\$1.92	2
	SD	Torreon, CU	\$6,722	\$652	\$75.34	\$1.91	3
Soybeans	MO	Bojay (Tula), HG	\$7,868	\$693	\$87.46	\$2.38	4
	NE	Guadalajara, JA	\$8,447	\$792	\$94.40	\$2.57	4
	IA	El Castillo, JA	\$8,855	\$774	\$98.38	\$2.67	4
	KS	Torreon, CU	\$6,864	\$491	\$75.15	\$2.04	3
Sorghum	TX	Guadalajara, JA	\$6,953	\$507	\$76.22	\$1.93	7
	NE	Celaya, GJ	\$7,212	\$707	\$80.91	\$2.05	3
	KS	Queretaro, QA	\$6,650	\$444	\$72.48	\$1.84	-2
	NE	Salinas Victoria, NL	\$5,368	\$520	\$60.15	\$1.53	-1
	NE	Torreon, CU	\$6,243	\$580	\$69.72	\$1.77	2

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

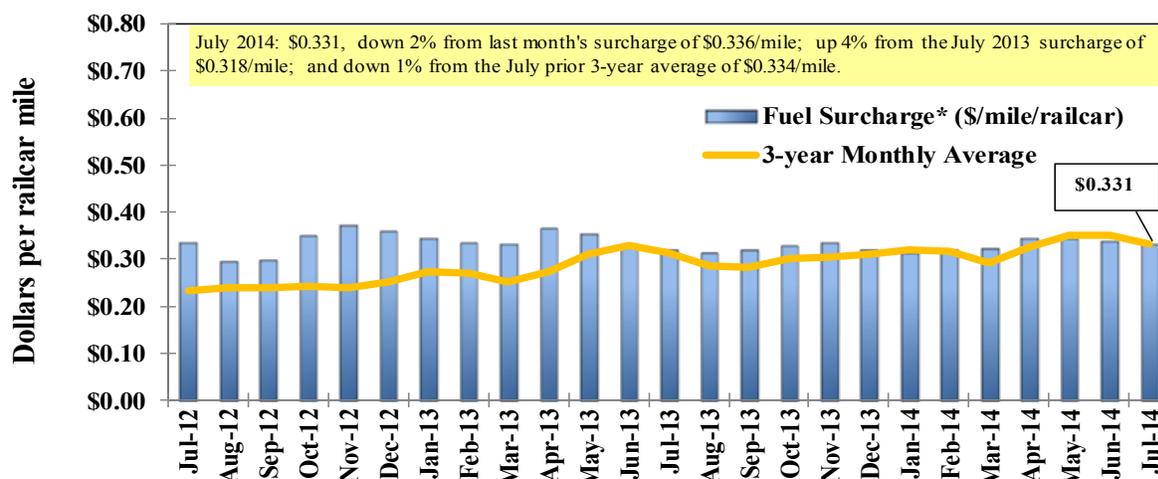
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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

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

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹

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

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

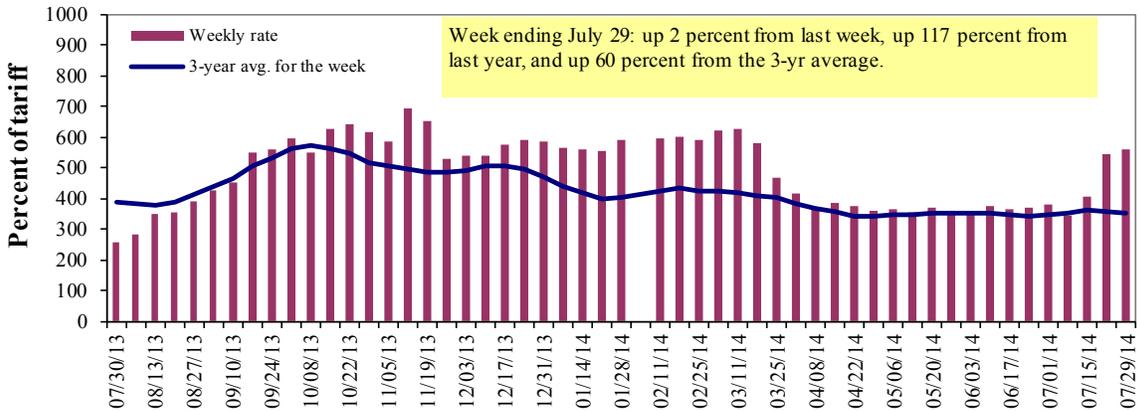
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.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

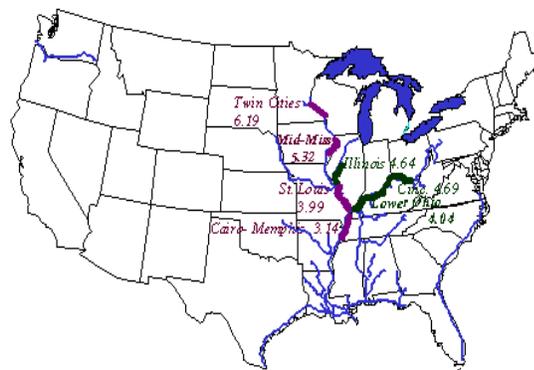
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	7/29/2014	-	568	560	408	455	455	367
	7/22/2014	595	538	547	395	447	447	323
\$/ton	7/29/2014	-	30.22	25.98	16.28	21.34	18.38	11.52
	7/22/2014	36.83	28.62	25.38	15.76	20.96	18.06	10.14
Current week % change from the same week:								
	Last year	-	104	117	88	120	120	95
	3-year avg. ²	-	67	60	42	50	50	44
Rate¹	August	588	557	558	492	533	533	463
	October	775	758	767	675	780	780	642

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; - River closed in Twin Cities area for dredging.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9
Benchmark tariff rates



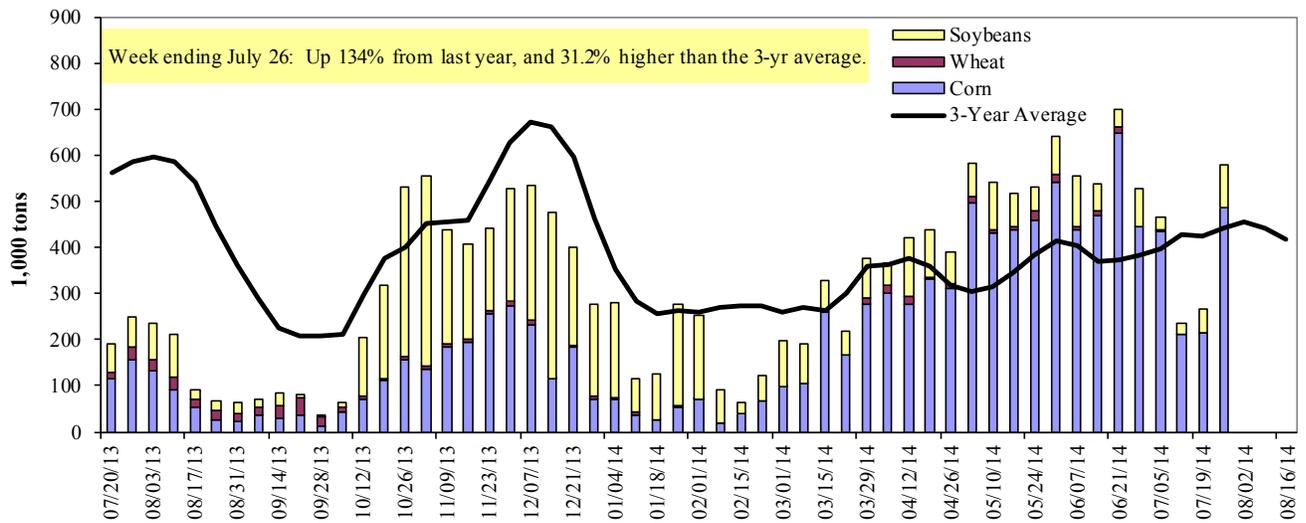
Calculating barge rate per ton:

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

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 7/26/2014	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	208	2	16	6	231
Winfield, MO (L25)	315	0	31	0	346
Alton, IL (L26)	494	0	55	0	548
Granite City, IL (L27)	485	0	95	0	580
Illinois River (L8)	152	0	3	0	155
Ohio River (L52)	86	70	2	0	158
Arkansas River (L1)	0	46	1	0	48
Weekly total - 2014	571	116	98	0	786
Weekly total - 2013	190	165	72	14	441
2014 YTD ¹	13,279	1,411	4,905	122	19,716
2013 YTD	4,882	2,518	4,246	133	11,779
2014 as % of 2013 YTD	272	56	116	92	167
Last 4 weeks as % of 2013 ²	222	67	69	60	135
Total 2013	9,504	4,111	10,065	255	23,935

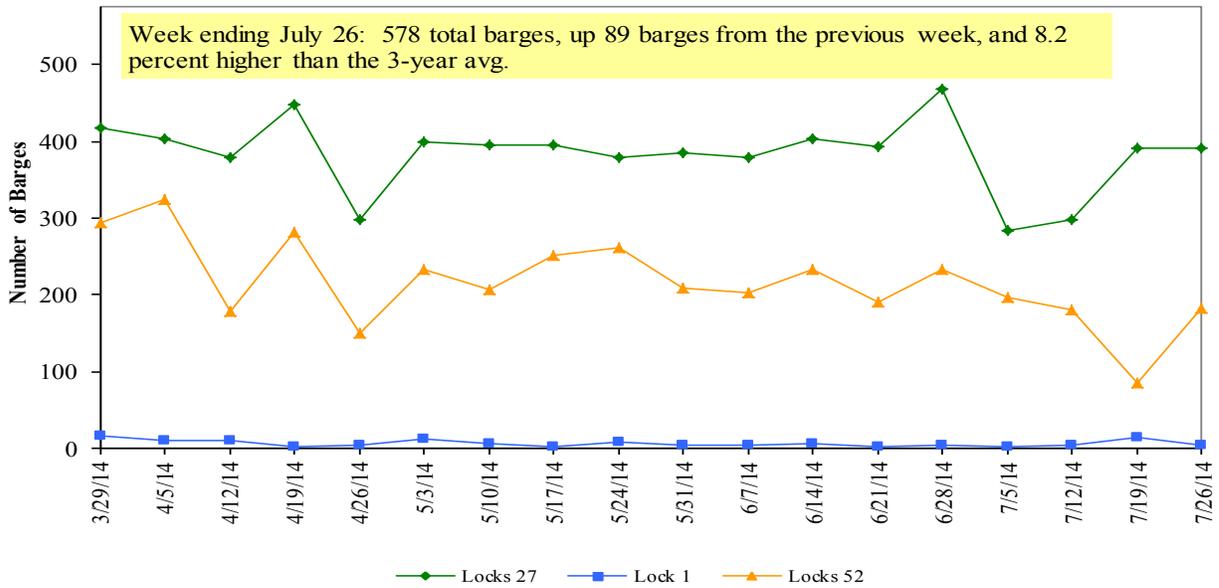
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2013.

Note: Total may not add exactly, due to rounding

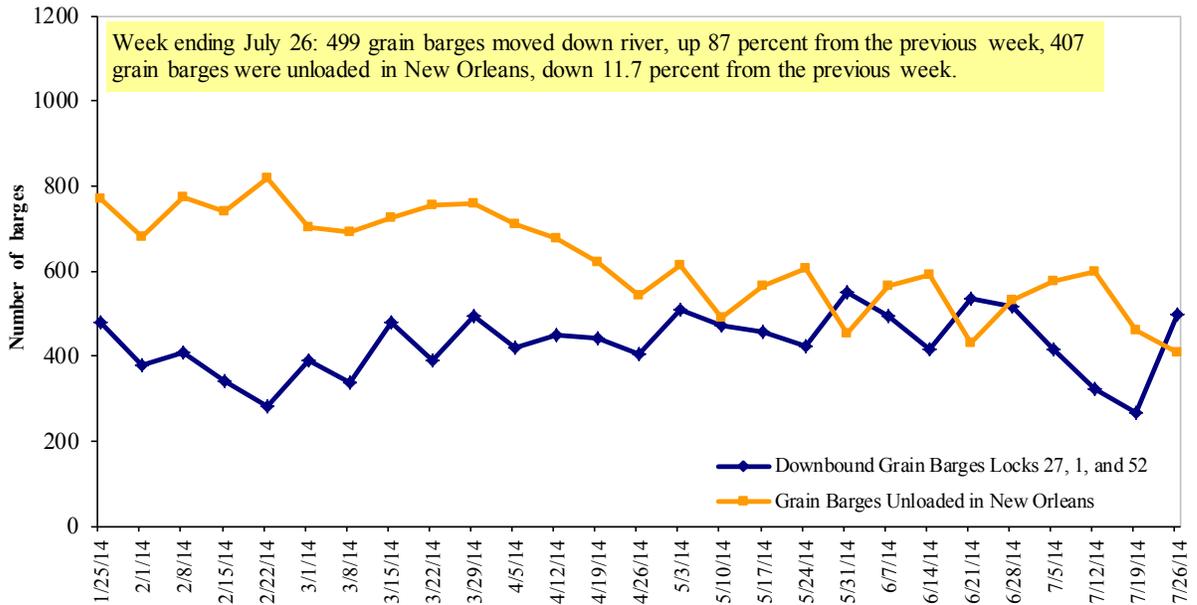
Source: U.S. Army Corps of Engineers

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



Source: U.S. Army Corps of Engineers

Figure 12
Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices¹, Week Ending 7/28/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.910	-0.018	-0.021
	New England	4.044	-0.008	-0.017
	Central Atlantic	3.993	-0.021	0.000
	Lower Atlantic	3.817	-0.019	-0.044
II	Midwest ²	3.801	-0.009	-0.085
III	Gulf Coast ³	3.767	-0.006	-0.078
IV	Rocky Mountain	3.888	-0.001	-0.025
V	West Coast	4.017	-0.009	-0.035
	West Coast less California	3.928	-0.014	-0.042
	California	4.090	-0.006	-0.032
Total	U.S.	3.858	-0.011	-0.057

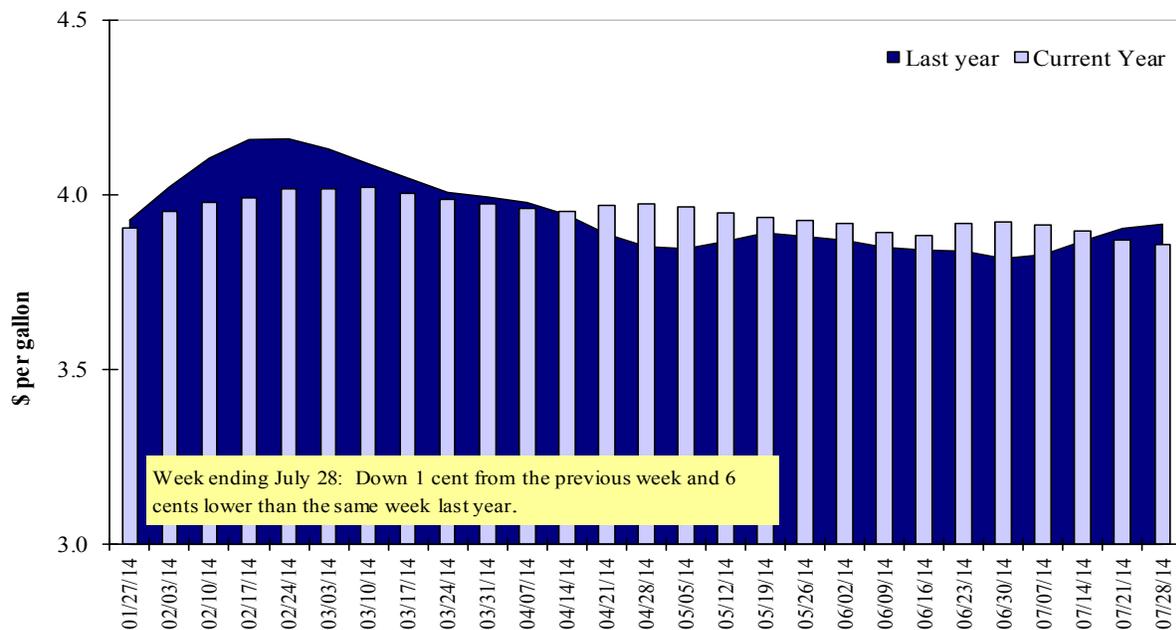
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
7/17/2014	1,575	968	2,069	1,060	121	5,792	7,372	1,997	15,161
This week year ago	1,845	3,850	1,250	1,094	85	8,124	2,715	1,295	12,134
Cumulative exports-marketing year²									
2013/14 YTD	1,022	584	1,008	478	46	3,139	41,069	43,840	88,048
2012/13 YTD	1,872	1,313	653	302	32	4,171	15,969	35,716	55,856
YTD 2013/14 as % of 2012/13	55	44	154	158	144	75	257	123	158
Last 4 wks as % of same period 2012/13	91	27	169	91	146	73	305	153	133
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293
2011/12 Total	9,904	4,319	6,312	5,601	491	26,627	37,900	36,727	101,254

¹ Current unshipped export sales to date

² Shipped export sales to date; new marketing year begins for wheat

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 07/17/2014	Total Commitments ²			% change current MY from last MY	Exports ³ 2012/13
	2014/15 Next MY	2013/14 Current MY	2012/13 Last MY		
		- 1,000 mt -			- 1,000 mt -
Japan	1,686	11,454	7,088	62	7,000
Mexico	1,725	10,504	4,414	138	4,370
China	5	2,883	2,480	16	2,450
Korea	2	4,427	418	958	416
Taiwan	18	1,997	518	286	512
Top 5 Importers	3,435	31,265	14,919	110	14,748
Total US corn export sales	5,895	48,441	18,685	159	18,690
% of Projected	14%	100%	100%		
Change from prior week	1,144	292	(28)		
Top 5 importers' share of U.S. corn export sales	58%	65%	80%		79%
USDA forecast, July 2014	43,180	48,260	18,690	158	
Corn Use for Ethanol USDA forecast, July 2014	128,270	128,270	118,059	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 07/17/2014	Total Commitments ²			% change current MY from last MY	Exports ³ 2012/13
	2014/15 Next MY	2013/14 Current MY	2012/13 Last MY		
		- 1,000 mt -			- 1,000 mt -
China	8,324	27,824	21,599	29	21,522
Mexico	415	3,265	2,586	26	2,565
Japan	219	1,903	1,807	5	1,751
Indonesia	226	2,391	1,614	48	1,682
Taiwan	60	1,283	1,152	11	1,120
Top 5 importers	9,243	36,666	28,758	27	28,641
Total US soybean export sales	14,735	45,837	36,471	26	35,910
% of Projected	32%	104%	102%		
Change from prior week	2,451	227	(412)		
Top 5 importers' share of U.S. soybean export sales	63%	80%	79%		
USDA forecast, July 2014	45,590	44,090	35,910	23	

(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 07/17/2014	Total Commitments ²		% change current MY from last MY	Exports ³ 2013/14
	2014/15 Current MY	2013/14 Last MY		
		- 1,000 mt -		- 1,000 mt -
China	182	3,450	(95)	4,213
Brazil	1,003	1,195	(16)	4,211
Mexico	1,083	1,154	(6)	2,940
Japan	993	762	30	2,674
Nigeria	605	774	(22)	2,629
Philippines	664	539	23	2,013
Korea	567	307	85	1,287
Indonesia	283	183	55	1,076
Taiwan	325	216	51	980
Colombia	186	263	(29)	783
Top 10 importers	5,890	8,843	(33)	22,808
Total US wheat export sales	8,931	12,296	(27)	32,160
% of Projected	36%	38%		
Change from prior week	443	661		
Top 10 importers' share of U.S. wheat export sales	66%	72%		71%
USDA forecast, July 2014	24,490	32,160	(24)	

(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 07/24/14	Previous Week ¹	Current Week as % of Previous	2014 YTD ¹	2013 YTD ¹	2014 YTD as % of 2013 YTD	Last 4-weeks as % of		Total ¹ 2013
							2013	3-yr. avg.	
Pacific Northwest									
Wheat	231	202	114	7,466	6,383	117	102	100	11,585
Corn	279	252	111	5,498	1,321	416	2,453	153	2,973
Soybeans	0	0	n/a	4,492	3,762	119	0	0	9,090
Total	510	454	112	17,456	11,467	152	210	112	23,647
Mississippi Gulf									
Wheat	74	168	44	2,783	5,376	52	53	87	9,711
Corn	368	522	70	19,328	6,385	303	260	173	14,828
Soybeans	92	74	124	10,424	7,451	140	141	52	21,462
Total	534	765	70	32,535	19,212	169	151	126	46,002
Texas Gulf									
Wheat	42	120	35	3,935	5,056	78	41	52	9,039
Corn	0	0	n/a	371	126	294	n/a	164	255
Soybeans	0	0	n/a	258	122	211	n/a	0	908
Total	42	120	35	4,564	5,304	86	44	55	10,203
Interior									
Wheat	37	23	161	713	576	124	568	97	1,244
Corn	82	94	88	3,150	1,514	208	67	101	3,943
Soybeans	22	24	92	2,165	1,757	123	337	75	3,212
Total	142	141	101	6,028	3,848	157	95	93	8,399
Great Lakes									
Wheat	15	0	n/a	253	460	55	62	78	884
Corn	3	20	15	94	0	n/a	n/a	510	0
Soybeans	0	0	n/a	51	22	229	n/a	0	699
Total	18	20	90	397	482	82	170	131	1,583
Atlantic									
Wheat	15	41	37	259	429	60	279	491	645
Corn	30	11	271	477	2	n/a	n/a	1,626	242
Soybeans	2	0	n/a	995	693	144	1,094	13	1,652
Total	47	52	90	1,730	1,124	154	568	327	2,540
U.S. total from ports²									
Wheat	415	554	75	15,408	18,281	84	67	84	33,108
Corn	763	899	85	28,918	9,349	309	337	161	22,241
Soybeans	116	99	117	18,385	13,807	133	153	47	37,024
Total	1,293	1,552	83	62,711	41,437	151	145	111	92,373

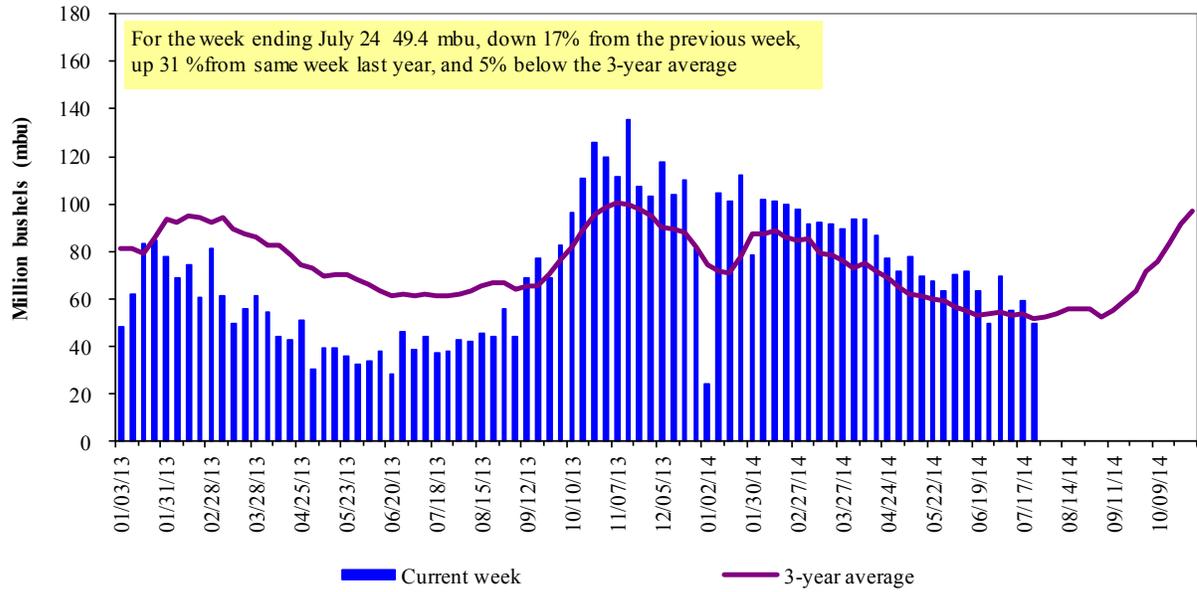
¹Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 61 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2013.

Figure 14

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

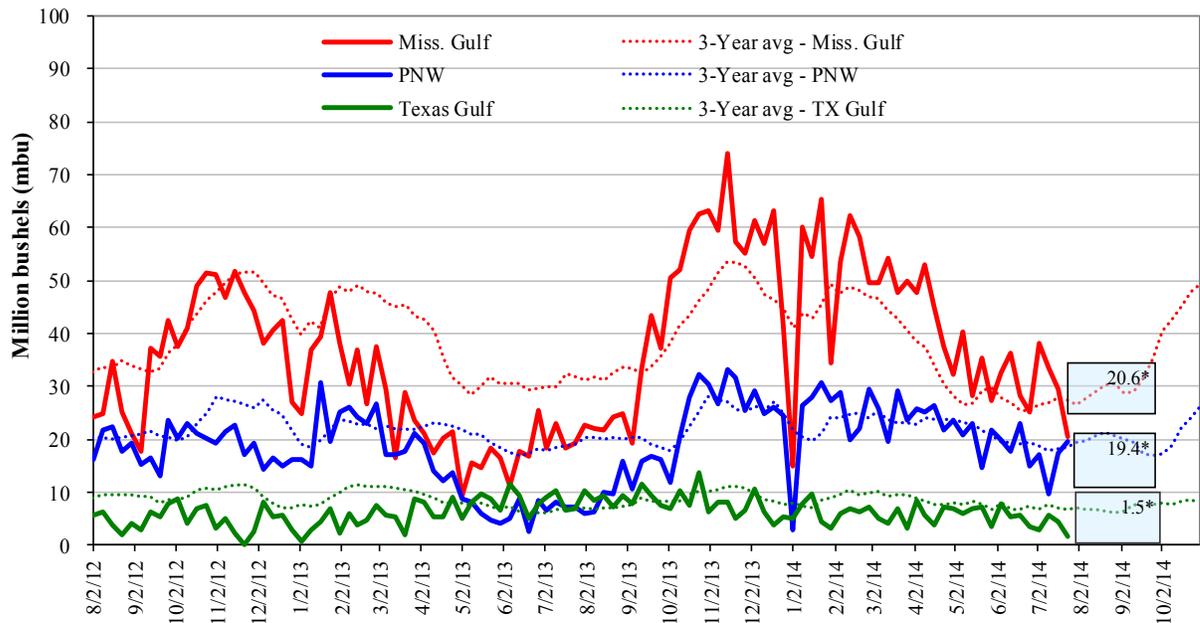


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

July 24: % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	down 31	down 65	down 35	up 12
Last year (same week)	up 7	down 77	down 15	up 165
3-yr avg (4-wk mov. avg)	down 14	down 77	down 27	up 34

Ocean Transportation

Table 17

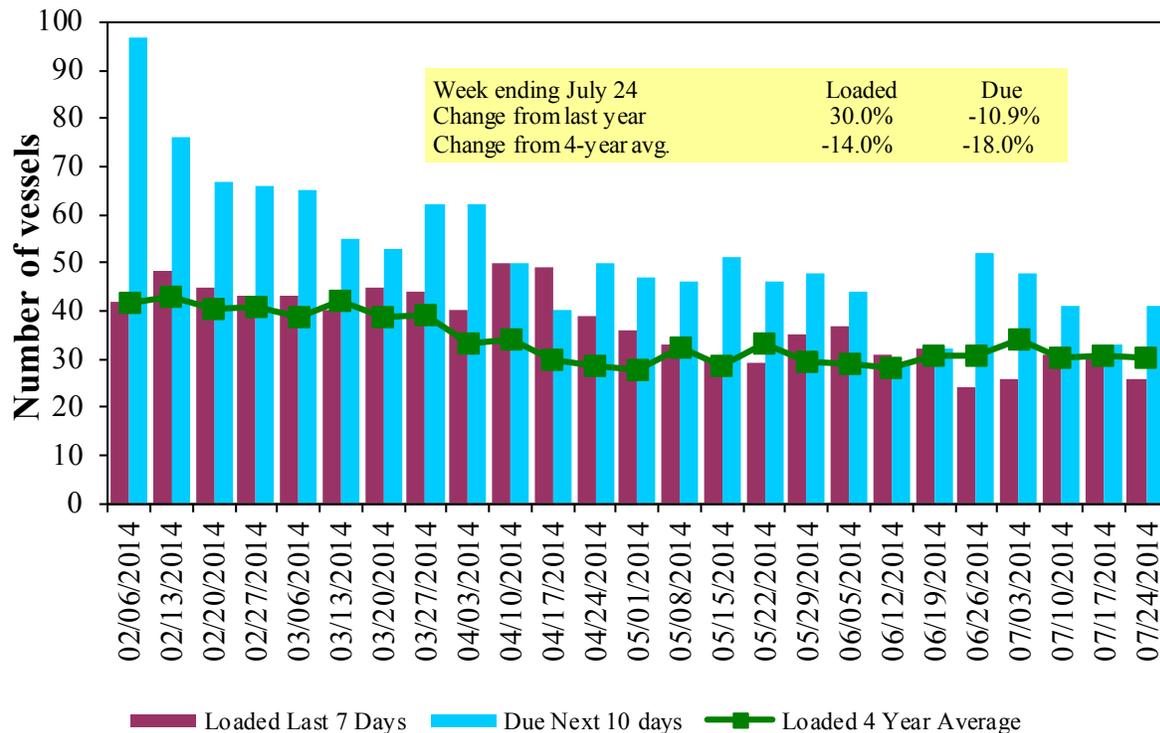
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
7/24/2014	37	26	41	12	n/a
7/17/2014	29	31	33	12	n/a
2013 range	(16..60)	(20..56)	(31..81)	(0..24)	n/a
2013 avg.	32	33	51	12	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

U.S. Gulf¹ Vessel Loading Activity

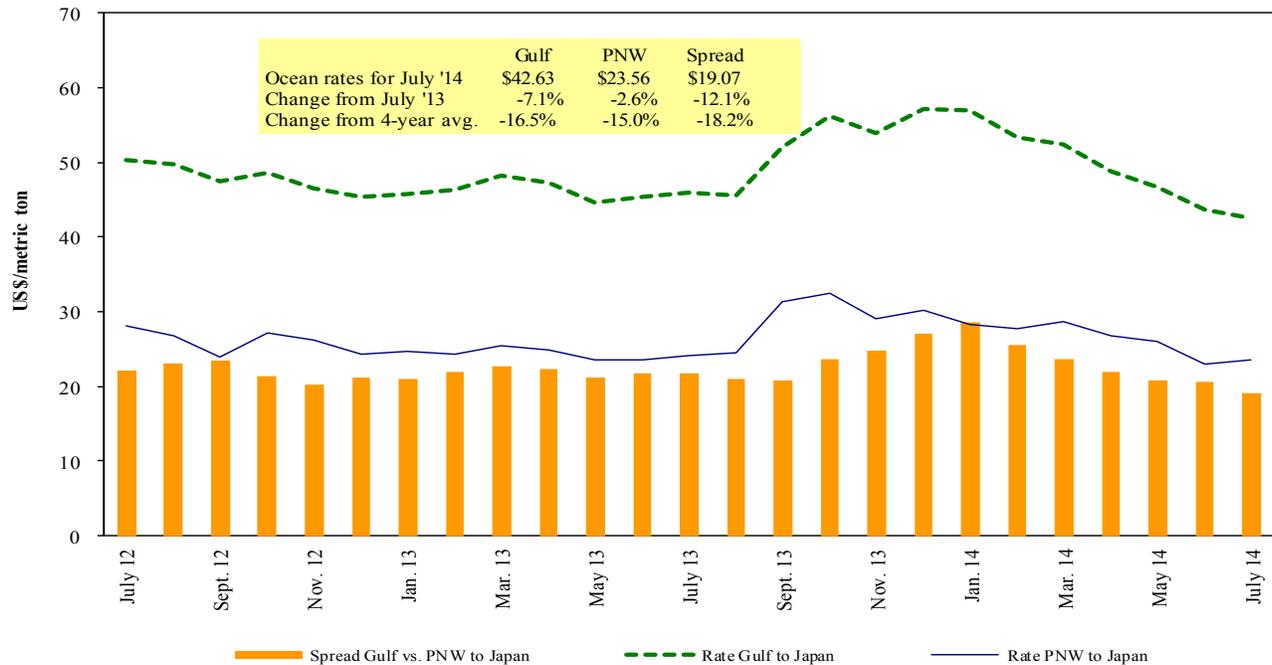


Source: Transportation & Marketing Programs/AMS/USDA

¹U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 07/26/2014

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Grain	Aug 1/10	50,000	49.25
U.S. Gulf	Djibouti ¹	Wheat	Aug 4/14	10,000	103.00
PNW	Philippines	Grain	Aug 1/15	65,000	22.50
Brazil	China	Grain	Aug 20/30	60,000	31.50
Brazil	China	Grain	Aug 10/31	60,000	33.25
Brazil	China	Grain	Aug 1/30	65,000	35.50
Brazil	China	Heavy Grain	Aug 1/5	60,000	40.00
Brazil	China	Grain	Jul 25/31	60,000	31.50
Brazil	China	Heavy Grain	Jul 15/Aug 15	60,000	40.00
Brazil	China	Heavy Grain	Jul 10/20	60,000	33.75
River Plate	China	Heavy Grain	Aug 1/31	60,000	44.50
River Plate	China	Grain	Jul 20/30	60,000	37.00
Uruguay	Egypt Med	Soybeans	Jul 18/22	25,000	35.00

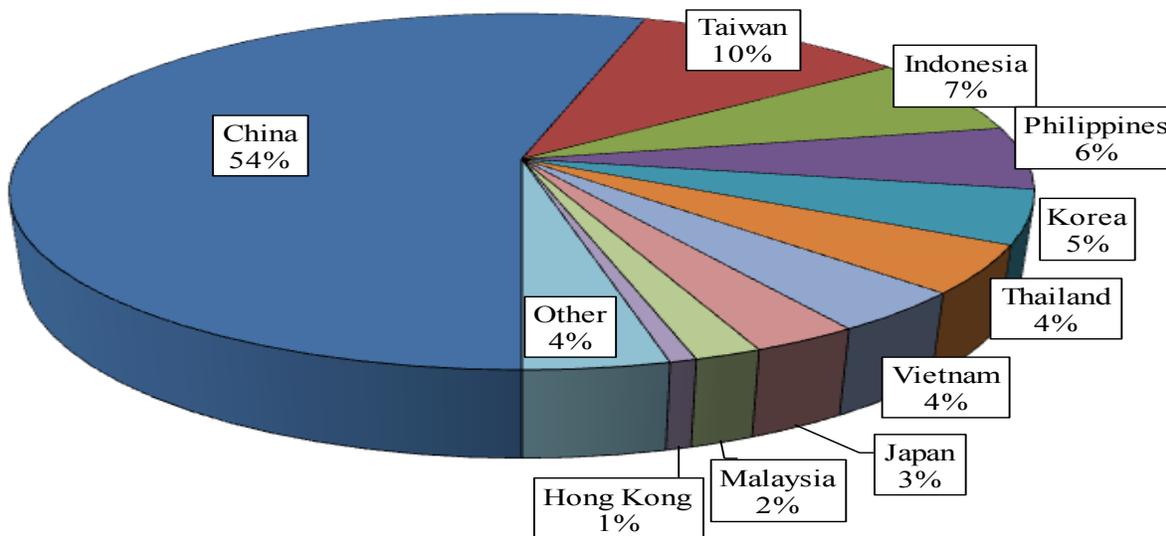
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

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.

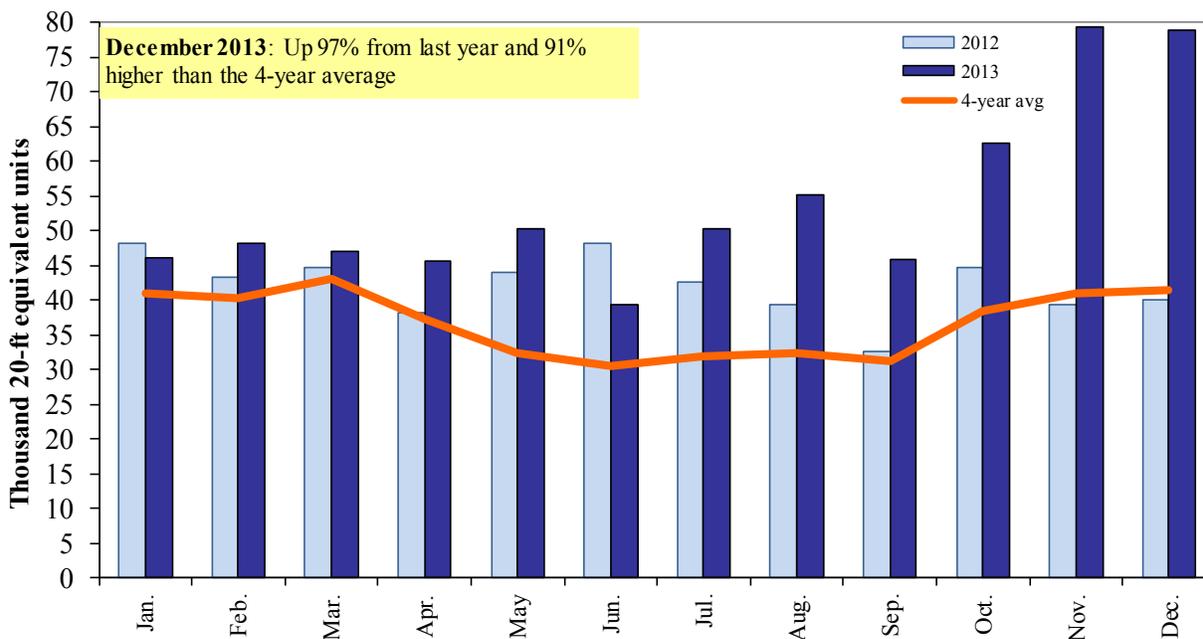
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, December 2013



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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