



Grain Transportation Report

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

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Aug. 22, 2013

WEEKLY HIGHLIGHTS

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The next
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BNSF Announces Capital Expenditures for ND, MT, and WA

BNSF has announced portions of its record \$4.3 billion capital spending plan in 2013 for maintenance and capacity expansion projects in three States. It plans to spend \$220 million in North Dakota, including 1,900 miles of track surfacing and undercutting. It plans to spend \$115 million in Montana, including 2,300 miles of track surfacing and undercutting. It plans to spend \$125 million in Washington, including 2,800 miles of track surfacing and undercutting. In addition, expenditures in Washington will include the construction of two 7,000-foot-long receiving and departure tracks at Delta Yard in Everett. The combined expenditures should improve network capacity and accommodate the demand for additional capacity where growth is occurring, according to BNSF.

Pacific Northwest Grain Inspections Rebound

For the week ending August 15, total inspections of grain (corn, wheat, and soybeans) for export reached 1.25 million metric tons (mmt), up 11 percent from the previous week but 31 percent below last year at this time. Pacific Northwest (PNW) grain inspections jumped 62 percent from the previous week, mainly because of increased wheat shipments to Asia. PNW inspections were also 36 percent above the 4-week running average and were supported by a 97-percent jump in PNW rail deliveries to port. Total inspections of wheat (.921 mmt) increased 39 percent from the past week, and soybean inspections (.144 mmt) increased 62 percent. Inspections of corn, however, dropped 52 percent from the previous week. The Mississippi Gulf had notable increases in wheat and soybean inspections from the past week.

Mississippi River Barge Operators Report Northbound Movements of Corn

The tight old-crop corn supplies are creating unusual transportation patterns. Corn basis levels, driven by domestic demand for ethanol and other uses, are higher than corn basis levels at the Gulf, pulling corn from outside the typical Cornbelt origination points. Corn, some of which may be from the early southern corn harvest, along with fertilizer for post-harvest application are being transported by barge upriver to meet the ethanol and fertilizer demand. Over the past 2 weeks more than 76,000 tons of corn have moved northbound through the Mississippi River locking system according to the Army Corps of Engineers.

Snapshots by Sector

Rail

U.S. railroads originated 16,754 **carloads of grain** during the week ending August 10, up 6 percent from last week, down 11 percent from last year, and down 9 percent from the 3-year average.

During the week ending August 15, average September non-shuttle **secondary railcar bids/offers per car** were at tariff, up \$10 from last week and \$15 lower than last year. Average shuttle bids/offers were \$51 below tariff, up \$80.50 from last week and \$318 higher than last year.

Barge

During the week ending August 17, **barge grain movements** totaled 324,304 tons, 24 percent lower than the previous week and 39.5 percent lower than the same period last year.

During the week ending August 17, 229 grain barges **moved down river**, down 19.4 percent from last week; 380 grain barges were **unloaded in New Orleans**, up 1 percent from the previous week.

Ocean

During the week ending August 15, 28 **ocean-going grain vessels** were loaded in the Gulf, down 22 percent from the same period last year. Thirty-five vessels are expected to be loaded within the next 10 days, down 30 percent from the same period last year.

During the week ending August 16, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$45 per mt, 1 percent less than the previous week. The cost of shipping from the Pacific Northwest to Japan was \$24 per mt, unchanged from the previous week.

Fuel

During the week ending August 19, U.S. average **diesel fuel prices** were nearly unchanged from the previous week at \$3.90 per gallon—13 cents lower than the same week last year.

Containerized Grain Exports

Containerized grain exports to Asia in May totaled more than 48,900 20-foot equivalent units—11 percent higher than the previous year, 52 percent lower than the 4-year average, and 7 percent higher than April movements.

Feature Article/Calendar

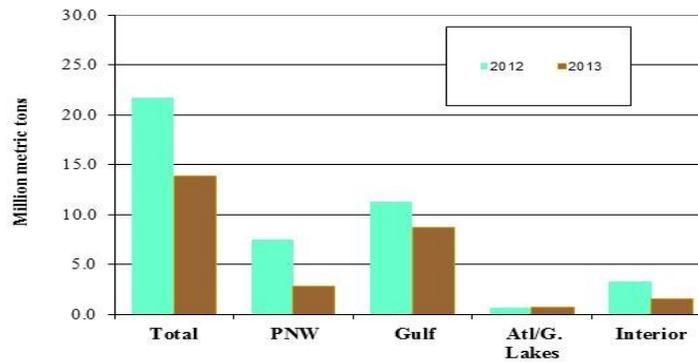
Second Quarter Grain Inspections at Record Low

As demand weakened and supplies became tighter due to drought, total second quarter grain (wheat, corn, and soybeans) inspected for export from all U.S. ports reached a record low of 13.84 million metric tons (mmt), according to USDA's Grain Inspection, Packers and Stockyards Administration (GIPSA). Weaker demand and tighter supplies pushed grain inspections 36 percent below last year (see figure 1). Inspections also dropped 40 percent below the first quarter and the 5-year average for the second quarter. Corn inspections were the lowest on record mainly because of drought. Low supplies and increased competition from South America pushed soybean inspections to the second lowest level on record. Wheat inspections, however, increased slightly from last year. The short term outlook is for increased wheat shipments due to the strong export sales pace, but for lower corn and soybean sales (GTR Tables 13, 14, and 15). The longer term outlook, however, is better. USDA increased its 2013/2014 July estimate for wheat, corn, and soybean exports because of increased acreage and better crop conditions this year.

Grain inspections decreased in each of the major export regions as competition increased and supplies tightened (see figure 1). Pacific Northwest (PNW) grain inspections reached a record low of 2.84 mmt, down 62 percent from last year and 61 percent below the 5-year average. The large drop is also reflected in PNW rail deliveries to port which dropped over 71

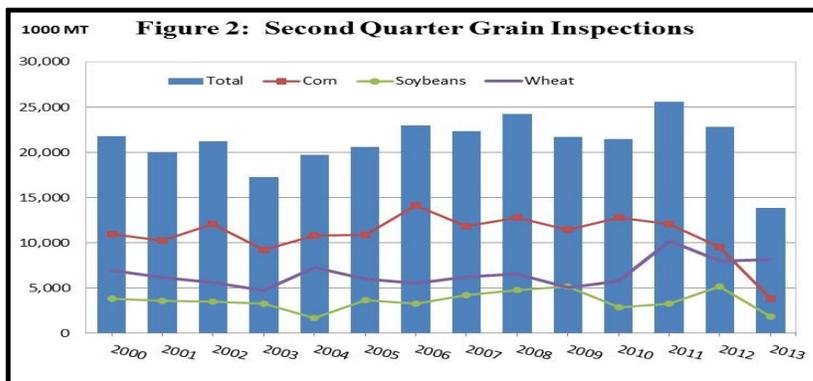
percent from last year during the second quarter. The 70-percent jump in second quarter rail deliveries to Gulf ports could not offset the large drop in grain inspected for export in the Gulf. Low demand and slower Mississippi Gulf barge movements helped push U.S. Gulf grain inspections to a record low 8.71 mmt, down 23 percent from last year and 31 percent below the 5-year average. Second quarter Atlantic/Great Lakes inspections totaled .696 mmt, up 8 percent from last year, primarily because of increased wheat shipments to Canada and Asia. Interior (land-based) grain inspections reached 1.59 mmt, down 52 percent from last year and 42 percent below the 5-year average. Second quarter Interior wheat inspections decreased 24 percent as shipments to Mexico receded. Second quarter corn and soybean inspections in the Interior dropped 67 and 27 percent, respectively, from last year.

Figure 1- Second quarter grain inspections by port regions



inspections totaled .696 mmt, up 8 percent from last year, primarily because of increased wheat shipments to Canada and Asia. Interior (land-based) grain inspections reached 1.59 mmt, down 52 percent from last year and 42 percent below the 5-year average. Second quarter Interior wheat inspections decreased 24 percent as shipments to Mexico receded. Second quarter corn and soybean inspections in the Interior dropped 67 and 27 percent, respectively, from last year.

According to GIPSA, total wheat inspections reached 8.16 mmt during the second quarter, up 2 percent



from last year and 14 percent above the 5-year average (see figure 2). Second quarter wheat inspections increased 25 percent from last year in the Gulf (4.72 mmt) as shipments to Latin America and Asia rebounded, but inspections of wheat dropped 26 percent in the PNW (2.59 mmt) due primarily to lesser shipments to Asia.

Total second quarter corn inspections reached a record low of 3.83 mmt, down 60 percent from last year as competition increased and stocks remained low from the drought (see figure 2). Low supplies pushed PNW corn inspections (.125 mmt) down 95 percent from last year. Gulf corn inspections reached a record low of 2.97 mmt, down 42 percent from last year as shipments to Asia and Latin America receded.

Total second quarter soybean inspections reached 1.86 mmt, down 64 percent from last year, as shipments to China and other destinations dropped significantly (see figure 2). Soybean inspections were 57 percent below the 5-year average. U.S. Gulf second quarter soybean inspections (.98 mmt) decreased 59 percent from last year, and PNW soybean inspections (.12 mmt) decreased 92 percent from last year as shipments to Asia receded.

In its August World Agricultural Supply and Demand Estimates report, USDA projected a big rebound in corn exports during 2013/14—increasing to 31.1 mmt, or 71 percent from the drought-reduced 18.2 mmt in 2012/13. Wheat exports are also expected to increase from last year due to reduced competition from Black Sea exporters. In August, USDA also projected the 2013/14 soybean exports to be 3 percent higher than in 2012/13. Soybean export sales for 2013/14 have been accumulating fast. For the week ending August 8, the 2013/14 [soybean export sale commitments](#) were 48 percent of the projected total for the year, second only to the previous record for this date of 55.7 percent set last year. johnny.hill@ams.usda.gov

Grain Transportation Indicators

Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
08/21/13	262	234	206	197	201	170
08/14/13	261	234	205	196	203	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)

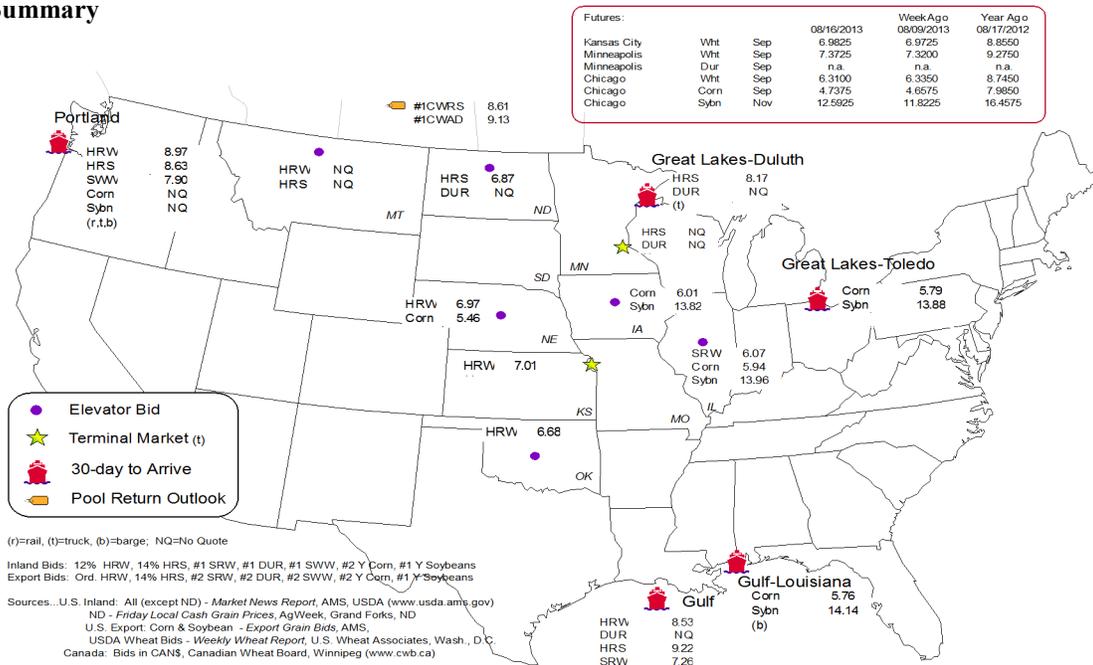
Commodity	Origin--Destination	8/16/2013	8/9/2013
Corn	IL--Gulf	0.18	0.13
Corn	NE--Gulf	-0.30	0.48
Soybean	IA--Gulf	-0.32	-0.29
HRW	KS--Gulf	-1.52	-1.52
HRS	ND--Portland	-1.76	-1.94

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				
08/14/2013 ^p	0	1,490	1,970	44		3,504	08/10/13	1,110
08/07/2013 ^r	0	2,368	1,003	32		3,403	08/03/13	1,514
2013 YTD ^r	9,872	42,229	78,953	10,022		141,076	2013 YTD	39,084
2012 YTD ^r	6,264	24,483	129,421	11,302		171,470	2012 YTD	65,267
2013 YTD as % of 2012 YTD	158	172	61	89		82	% change YTD	60
Last 4 weeks as % of 2012 ²	7	241	36	73		65	Last 4wks % 2012	82
Last 4 weeks as % of 4-year avg. ²	10	171	37	55		64	Last 4wks % 4 yr	80
Total 2012	22,604	40,780	199,419	34,681		287,462	Total 2012	92,008
Total 2011	27,358	77,515	191,187	24,088		320,148	Total 2011	97,118

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2012 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.

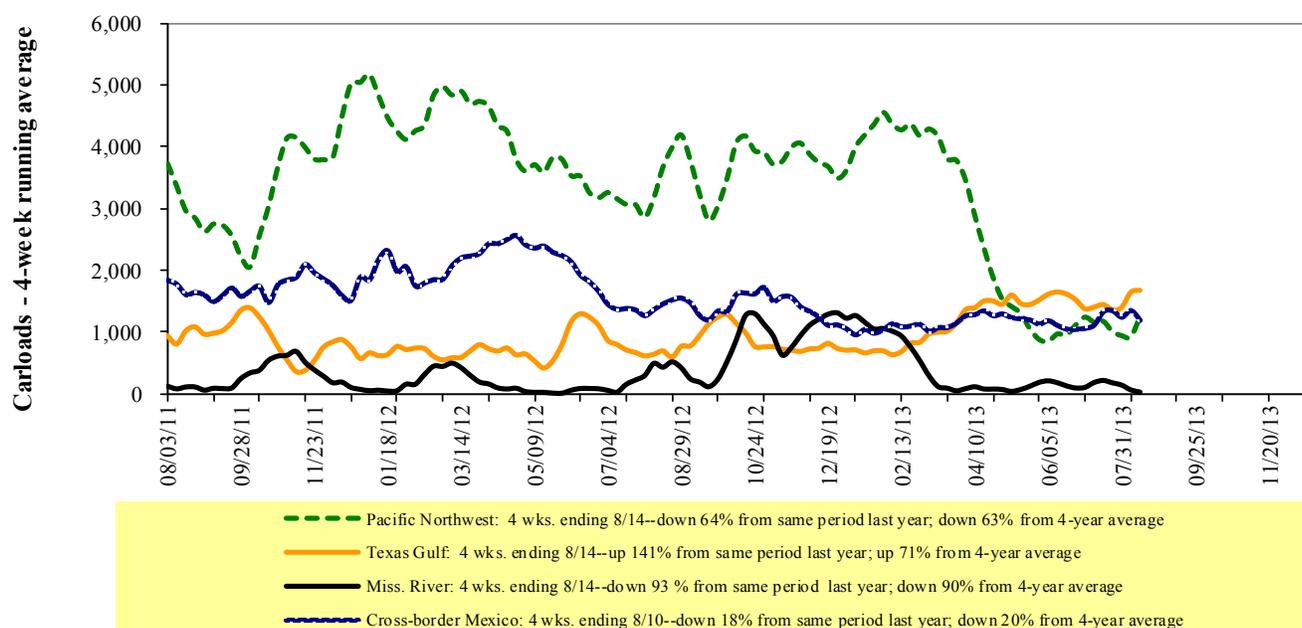
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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

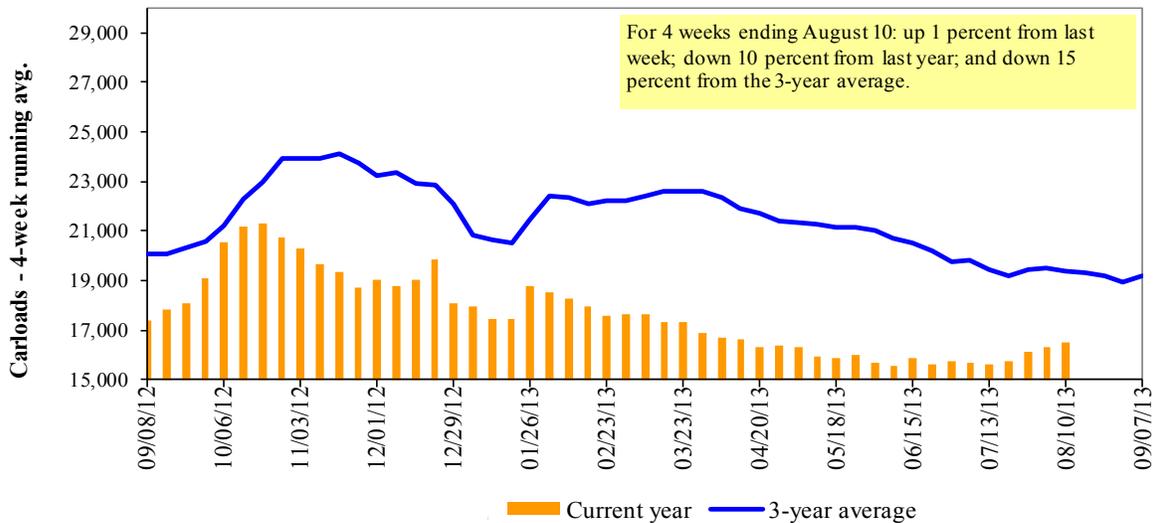
Class I Rail Carrier Grain Car Bulletin (grain carloads originated)

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
08/10/13	1,169	1,896	8,691	771	4,227	16,754	2,611	5,034
This week last year	1,086	2,523	10,174	478	4,644	18,905	3,589	5,091
2013 YTD	46,091	79,994	271,486	15,377	121,724	534,672	100,553	164,380
2012 YTD	57,319	90,564	307,958	16,184	164,017	636,042	122,737	150,836
2013 YTD as % of 2012 YTD	80	88	88	95	74	84	82	109
Last 4 weeks as % of 2012	118	78	95	104	81	90	75	106
Last 4 weeks as % of 3-yr avg. ¹	89	83	91	96	76	86	78	95
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							
	Sep-13	Sep-12	Oct-13	Oct-12	Nov-13	Nov-12	Dec-13	Dec-12
BNSF ³								
COT grain units	0	1	6	no bids	2	no offer	1	no offer
COT grain single-car ⁵	0 . . 15	0 . . 6	0 . . 3	0 . . 10	1 . . 3	no offer	0 . . 3	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	1	1	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.

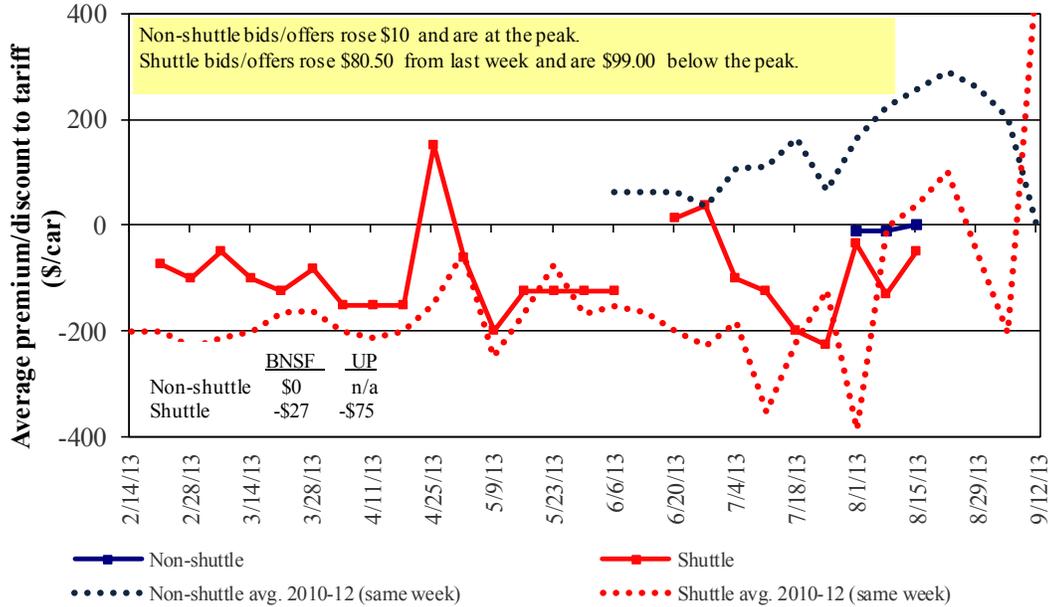
⁵Range is shown because average is not available. Not available = n/a.

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 September 2013, Secondary Market

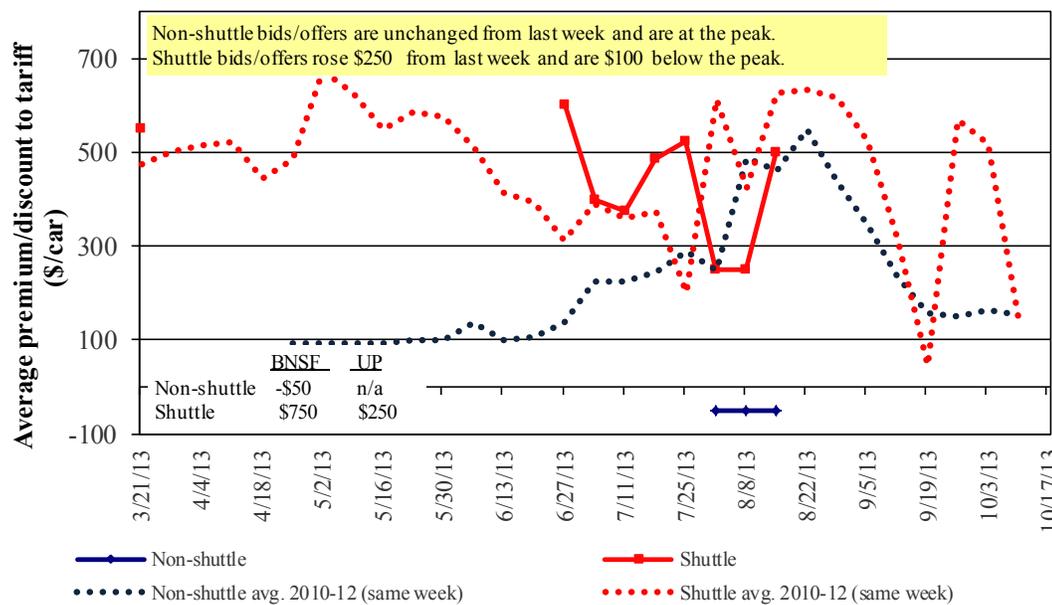


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

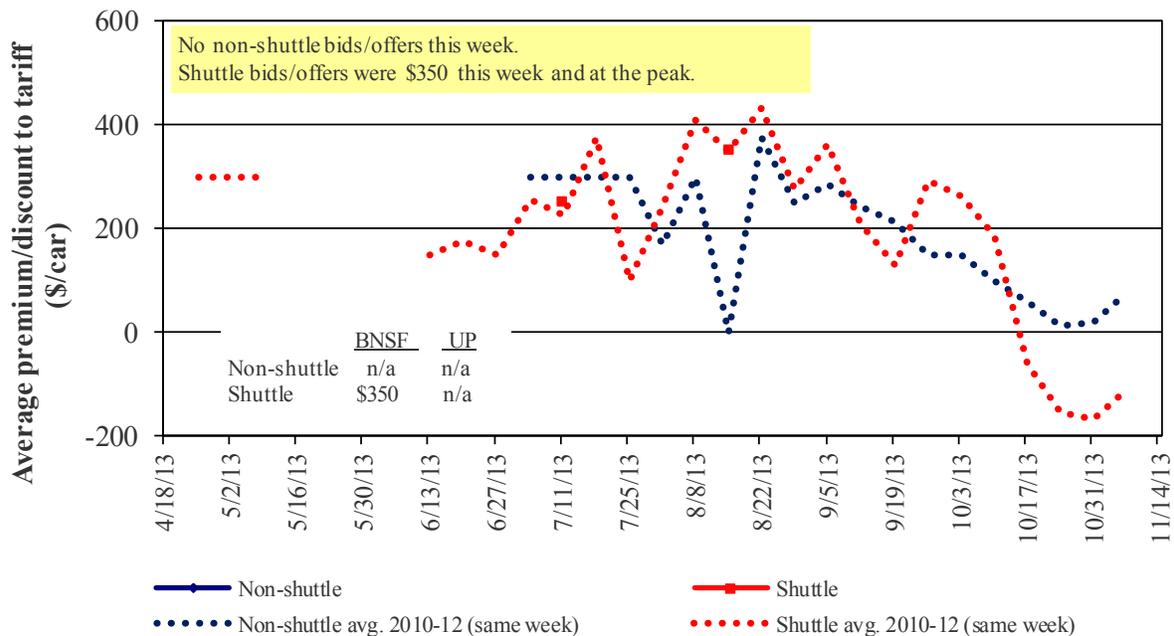


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in November 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					
	Sep-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14
Non-shuttle						
BNSF-GF	-	(50)	n/a	n/a	n/a	n/a
Change from last week	10	-	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	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	(27)	750	350	n/a	n/a	n/a
Change from last week	61	n/a	n/a	n/a	n/a	n/a
Change from same week 2012	361	n/a	n/a	n/a	n/a	n/a
UP-Pool	(75)	250	n/a	n/a	n/a	n/a
Change from last week	100	-	n/a	n/a	n/a	n/a
Change from same week 2012	275	(50)	n/a	n/a	n/a	n/a

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

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

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

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

Effective date:						Percent	
8/1/2013	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		change Y/Y ³
					metric ton	bushe ²	
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,191	\$177	\$33.45	\$0.91	2
	Grand Forks, ND	Duluth-Superior, MN	\$3,707	\$101	\$37.82	\$1.03	8
	Wichita, KS	Los Angeles, CA	\$6,244	\$520	\$67.17	\$1.83	4
	Wichita, KS	New Orleans, LA	\$3,808	\$312	\$40.91	\$1.11	4
	Sioux Falls, SD	Galveston-Houston, TX	\$5,824	\$427	\$62.08	\$1.69	5
	Northwest KS	Galveston-Houston, TX	\$4,076	\$341	\$43.87	\$1.19	4
	Amarillo, TX	Los Angeles, CA	\$4,275	\$475	\$47.17	\$1.28	4
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,110	\$352	\$34.38	\$0.87	2
	Toledo, OH	Raleigh, NC	\$4,508	\$407	\$48.81	\$1.24	3
	Des Moines, IA	Davenport, IA	\$2,006	\$75	\$20.66	\$0.52	4
	Indianapolis, IN	Atlanta, GA	\$3,920	\$306	\$41.96	\$1.07	3
	Indianapolis, IN	Knoxville, TN	\$3,354	\$196	\$35.25	\$0.90	3
	Des Moines, IA	Little Rock, AR	\$3,146	\$219	\$33.42	\$0.85	2
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,065	\$638	\$56.63	\$1.44	2
	Minneapolis, MN	New Orleans, LA	\$3,399	\$387	\$37.60	\$1.02	8
	Toledo, OH	Huntsville, AL	\$3,575	\$289	\$38.37	\$1.04	3
	Indianapolis, IN	Raleigh, NC	\$4,578	\$410	\$49.53	\$1.35	3
	Indianapolis, IN	Huntsville, AL	\$3,267	\$196	\$34.39	\$0.94	3
Champaign-Urbana, IL	New Orleans, LA	\$3,599	\$352	\$39.24	\$1.07	6	
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,678	\$299	\$39.50	\$1.07	6
	Wichita, KS	Galveston-Houston, TX	\$3,798	\$233	\$40.03	\$1.09	5
	Chicago, IL	Albany, NY	\$3,771	\$382	\$41.24	\$1.12	4
	Grand Forks, ND	Portland, OR	\$5,159	\$517	\$56.36	\$1.53	4
	Grand Forks, ND	Galveston-Houston, TX	\$6,181	\$538	\$66.73	\$1.82	4
	Northwest KS	Portland, OR	\$5,043	\$560	\$55.64	\$1.51	3
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$629	\$53.92	\$1.37	1
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$576	\$52.99	\$1.35	1
	Champaign-Urbana, IL	New Orleans, LA	\$2,929	\$352	\$32.58	\$0.83	3
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$336	\$36.21	\$0.92	1
	Des Moines, IA	Amarillo, TX	\$3,510	\$275	\$37.59	\$0.95	2
	Minneapolis, MN	Tacoma, WA	\$4,800	\$624	\$53.87	\$1.37	1
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,200	\$646	\$48.12	\$1.22	1
	Sioux Falls, SD	Tacoma, WA	\$5,320	\$576	\$58.55	\$1.59	6
	Minneapolis, MN	Portland, OR	\$5,330	\$629	\$59.18	\$1.61	6
	Fargo, ND	Tacoma, WA	\$5,230	\$512	\$57.02	\$1.55	6
	Council Bluffs, IA	New Orleans, LA	\$3,950	\$406	\$43.26	\$1.18	6
	Toledo, OH	Huntsville, AL	\$2,750	\$289	\$30.18	\$0.82	3
Grand Island, NE	Portland, OR	\$4,960	\$573	\$54.94	\$1.50	-2	

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

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

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

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

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

Table 8

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

Effective date: 8/1/2013

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel	Tariff plus surcharge per:		Percent change Y/Y ⁴
				surcharge per car ²	metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$6,360	\$547	\$70.57	\$1.92	-16
	OK	Cuautitlan, EM	\$6,715	\$664	\$75.40	\$2.05	-1
	KS	Guadalajara, JA	\$8,293	\$642	\$91.29	\$2.48	11
	TX	Salinas Victoria, NL	\$2,872	\$250	\$31.90	\$0.87	-21
Corn	IA	Guadalajara, JA	\$7,699	\$754	\$86.37	\$2.19	1
	SD	Celaya, GJ ⁵	\$7,356	\$715	\$82.47	\$2.09	n/a
	NE	Queretaro, QA	\$7,153	\$670	\$79.94	\$2.03	1
	SD	Salinas Victoria, NL	\$5,700	\$544	\$63.80	\$1.62	1
	MO	Tlalnepantla, EM	\$6,592	\$651	\$74.00	\$1.88	1
	SD	Torreón, CU	\$6,522	\$599	\$72.76	\$1.85	0
Soybeans	MO	Bojay (Tula), HG	\$7,580	\$636	\$83.95	\$2.28	3
	NE	Guadalajara, JA	\$8,134	\$728	\$90.55	\$2.46	3
	IA	El Castillo, JA	\$8,555	\$711	\$94.68	\$2.57	4
	KS	Torreón, CU	\$6,651	\$452	\$72.57	\$1.97	4
Sorghum	TX	Guadalajara, JA	\$6,464	\$465	\$70.80	\$1.80	-2
	NE	Celaya, GJ ⁵	\$6,997	\$649	\$78.12	\$1.98	n/a
	KS	Queretaro, QA	\$6,815	\$408	\$73.80	\$1.87	6
	NE	Salinas Victoria, NL	\$5,438	\$478	\$60.44	\$1.53	6
	NE	Torreón, CU	\$6,153	\$533	\$68.32	\$1.73	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

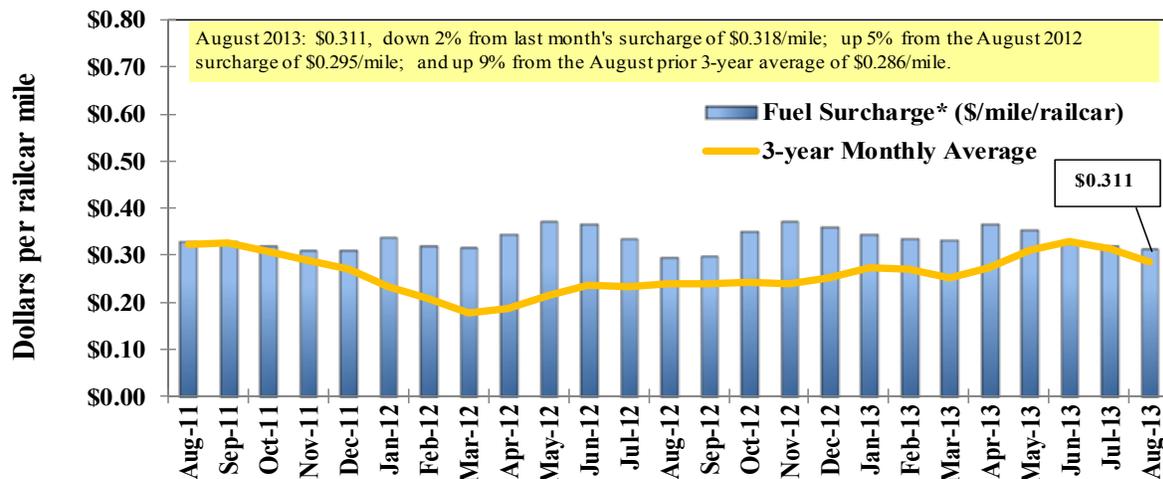
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹

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

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

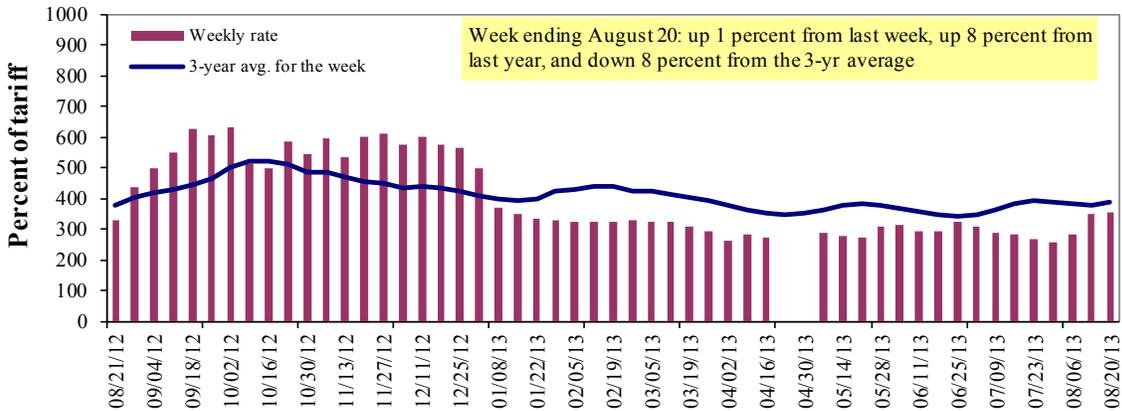
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	8/20/2013	368	358	355	308	363	363	290
	8/13/2013	370	353	352	308	360	360	278
\$/ton	8/20/2013	22.78	19.05	16.47	12.29	17.02	14.67	9.11
	8/13/2013	22.90	18.78	16.33	12.29	16.88	14.54	8.73
Current week % change from the same week:								
	Last year	-8	3	8	-13	6	6	-24
	3-year avg. ²	-17	-11	-8	-11	-8	-8	-15
Rate¹	September	492	477	492	472	507	507	435
	November	592	522	482	450	497	497	400

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

Source: Transportation & Marketing Programs/AMS/USDA

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 9

Benchmark tariff rates

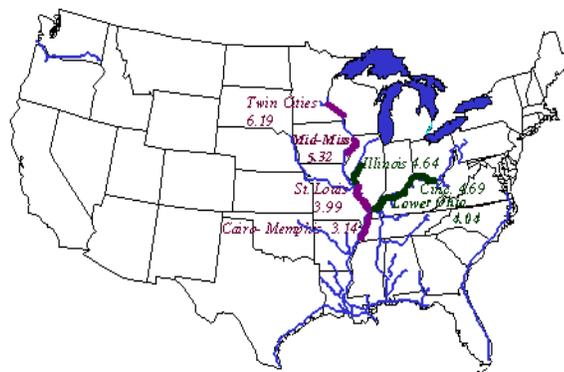
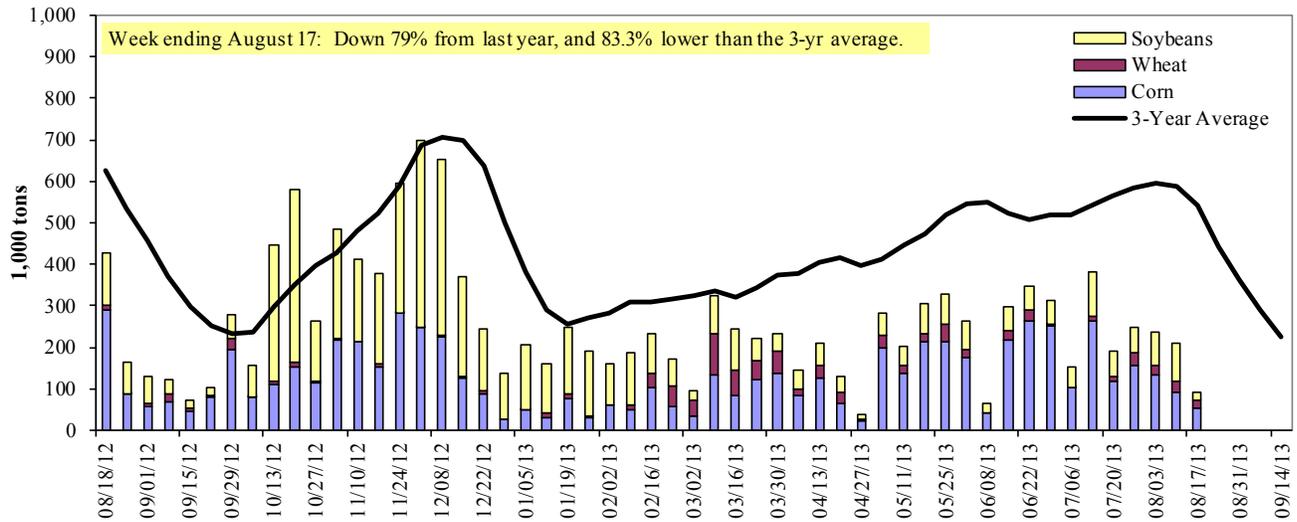


Figure 10

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 8/17/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	17	12	13	0	42
Winfield, MO (L25)	31	3	8	0	42
Alton, IL (L26)	52	12	18	0	81
Granite City, IL (L27)	53	19	18	0	89
Illinois River (L8)					
	3	2	3	0	8
Ohio River (L52)					
	11	196	14	0	221
Arkansas River (L1)					
	0	14	0	0	14
Weekly total - 2013	64	229	32	0	324
Weekly total - 2012	352	43	140	2	536
2013 YTD ¹	5,204	3,115	4,460	134	12,912
2012 YTD	11,492	1,336	6,956	190	19,975
2013 as % of 2012 YTD	45	233	64	70	65
Last 4 weeks as % of 2012 ²	39	444	26	110	60
Total 2012	14,837	1,794	12,663	229	29,523

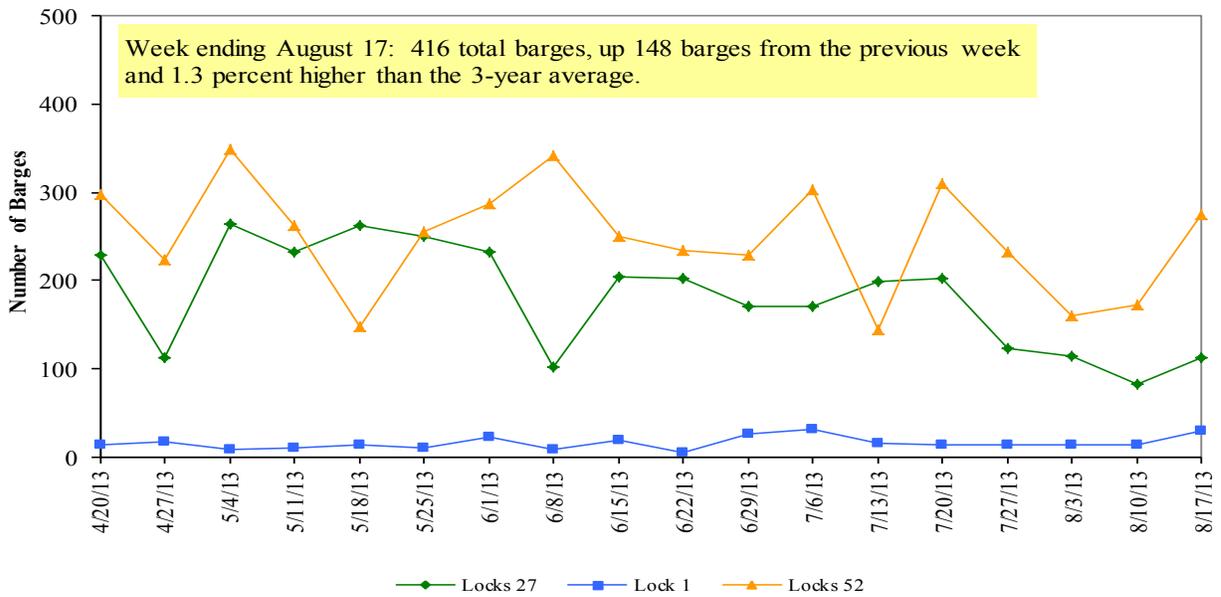
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2012.

Note: Total may not add exactly, due to rounding

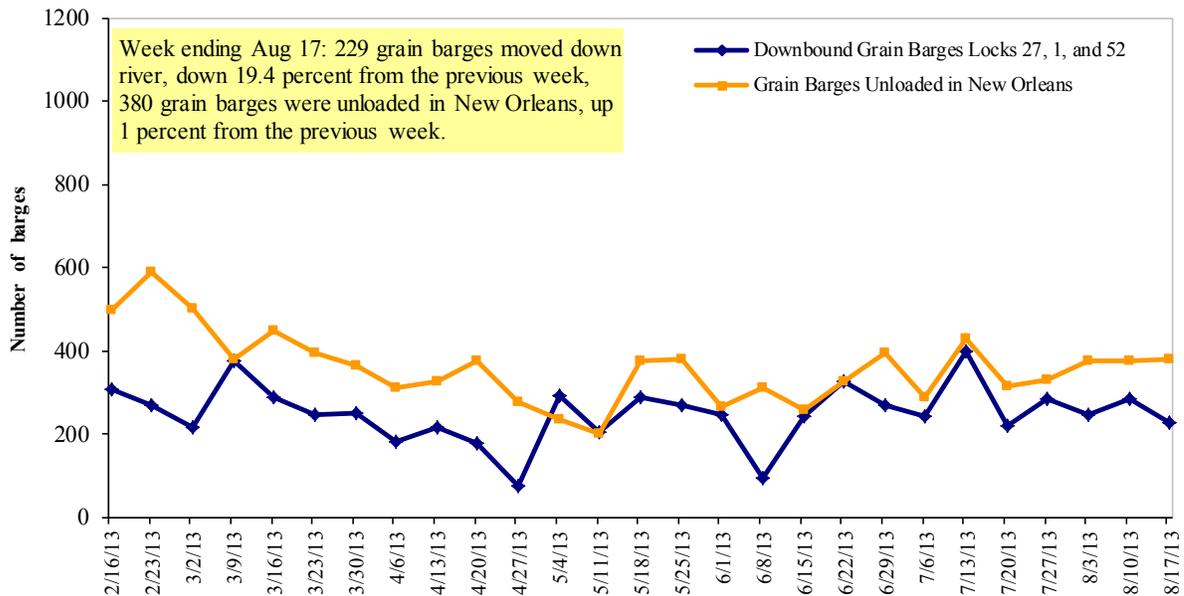
Source: U.S. Army Corps of Engineers

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 8/19/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.912	0.004	-0.094
	New England	4.036	-0.009	-0.051
	Central Atlantic	3.967	-0.005	-0.102
	Lower Atlantic	3.848	0.014	-0.096
II	Midwest ²	3.868	0.006	-0.147
III	Gulf Coast ³	3.822	-0.002	-0.089
IV	Rocky Mountain	3.920	-0.010	-0.142
V	West Coast	4.057	0.012	-0.197
	West Coast less California	3.965	0.019	-0.219
	California	4.134	0.006	-0.179
Total	U.S.	3.900	0.004	-0.126

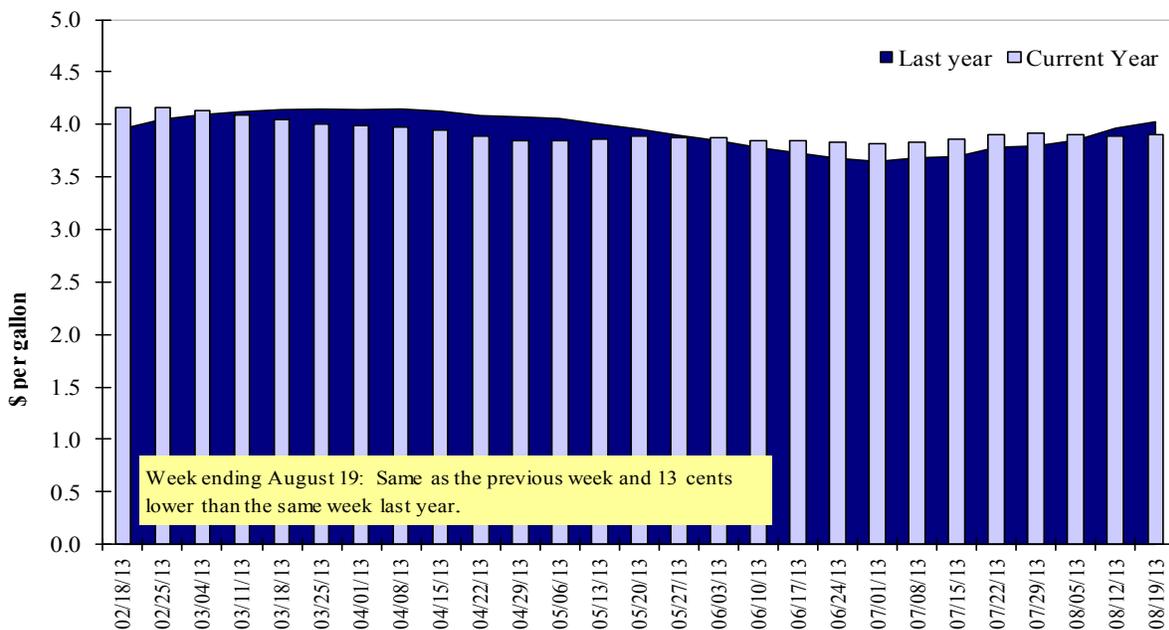
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
8/8/2013	1,880	3,289	1,457	1,101	100	7,827	1,944	1,221	10,992
This week year ago	1,462	676	1,512	1,225	104	4,978	2,920	3,507	11,405
Cumulative exports-marketing year²									
2012/13 YTD	2,812	2,054	868	516	32	6,282	17,105	35,937	59,324
2011/12 YTD	2,319	790	1,040	709	114	4,973	36,690	35,179	76,842
YTD 2012/13 as % of 2011/12	121	260	83	73	n/a	126	47	102	77
Last 4 wks as % of same period 2011/12	131	528	91	87	89	161	82	36	102
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 in effect 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 08/08/2013	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	1,204	7,252	12,267	(41)	12,367
Mexico	2,448	4,466	9,596	(53)	9,617
China	2,968	2,568	5,314	(52)	5,414
Korea	3	418	3,739	(89)	3,639
Venezuela	16	1,164	1,296	(10)	1,332
Top 5 Importers	6,639	15,868	32,212	(51)	32,369
Total US corn export sales	10,138	19,050	39,611	(52)	39,180
% of Projected	33%	105%	101%		
Change from prior week	836	(59)	123		
Top 5 importers' share of U.S. corn export sales	65%	83%	81%		83%
USDA forecast, August 2013	31,120	18,160	39,180	(54)	
Corn Use for Ethanol USDA forecast, Ethanol August 2013	124,460	118,110	127,280	(7)	

(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 08/08/2013	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	13,066	21,647	24,332	(11)	24,602
Mexico	425	2,602	3,178	(18)	3,180
Japan	237	1,835	1,859	(1)	1,891
Indonesia	82	1,649	1,639	1	1,741
Egypt	120	677	1,284	(47)	1,292
Top 5 importers	13,931	28,411	32,292	(12)	32,706
Total US soybean export sales	17,911	36,401	38,686	(6)	37,060
% of Projected	48%	102%	104%		
Change from prior week	1,893	(769)	97		
Top 5 importers' share of U.S. soybean export sales	78%	78%	83%		
USDA forecast, August 2013	37,690	35,790	37,060	(3)	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/>³FAS Marketing Year 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 08/08/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	1,006	1,335	(25)	3,544
Nigeria	958	958	0	3,002
Mexico	1,299	1,296	0	2,761
Philippines	667	812	(18)	1,965
Egypt	131	58	125	1,678
Korea	363	680	(47)	1,385
Taiwan	316	344	(8)	1,038
China	3,702	343	979	743
Brazil	1,594	50	3087	527
Colombia	365	203	80	600
Top 10 importers	10,401	6,080	71	17,243
Total US wheat export sales	14,109	9,951	42	26,348
% of Projected	47%	36%		
Change from prior week	490	394		
Top 10 importers' share of U.S. wheat export sales	74%	61%		65%
USDA forecast, August 2013	29,940	27,420	9	

(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 08/15/13	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	271	129	210	7,027	8,496	83	75	70	12,625
Corn	0	38	0	1,359	4,907	28	8	5	5,512
Soybeans	0	0	n/a	3,696	5,544	67	0	0	10,347
Total	271	167	162	12,082	18,947	64	42	35	28,484
Mississippi Gulf									
Wheat	367	231	159	6,215	4,020	155	235	257	5,462
Corn	87	265	33	7,063	12,801	55	89	54	18,068
Soybeans	130	83	157	7,694	11,388	68	18	29	24,684
Total	585	579	101	20,972	28,209	74	83	75	48,215
Texas Gulf									
Wheat	248	230	108	5,814	4,079	143	153	140	5,912
Corn	9	0	n/a	157	325	48	73	29	336
Soybeans	0	0	n/a	122	5	n/a	n/a	0	626
Total	257	230	112	6,093	4,409	138	149	128	6,874
Interior									
Wheat	18	42	43	664	804	83	234	122	1,218
Corn	83	71	116	1,698	4,913	35	138	43	6,115
Soybeans	10	6	170	1,777	2,715	65	58	25	4,204
Total	111	120	93	4,140	8,432	49	127	47	11,538
Great Lakes									
Wheat	6	16	37	482	193	250	228	63	481
Corn	0	0	n/a	0	46	0	0	0	56
Soybeans	0	0	n/a	22	148	15	0	0	713
Total	6	16	37	504	387	130	84	43	1,250
Atlantic									
Wheat	11	13	80	495	235	210	804	424	341
Corn	0	0	n/a	2	106	2	0	0	143
Soybeans	4	0	n/a	697	601	116	0	0	1,460
Total	15	13	111	1,193	942	127	234	156	1,944
U.S. total from ports²									
Wheat	921	661	139	20,696	17,827	116	138	128	26,040
Corn	180	374	48	10,280	23,097	45	58	38	30,230
Soybeans	144	89	162	14,009	20,401	69	16	22	42,035
Total	1,245	1,124	111	44,985	61,326	73	74	65	98,305

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

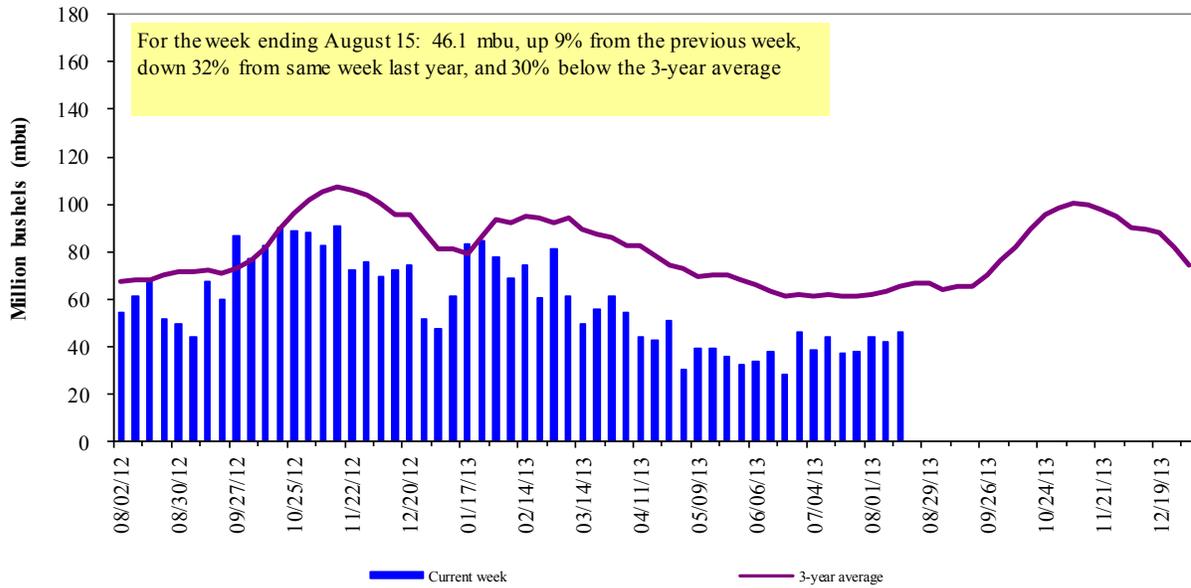
² Total includes only port regions shown above; Interior land-based shipments now included.

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)

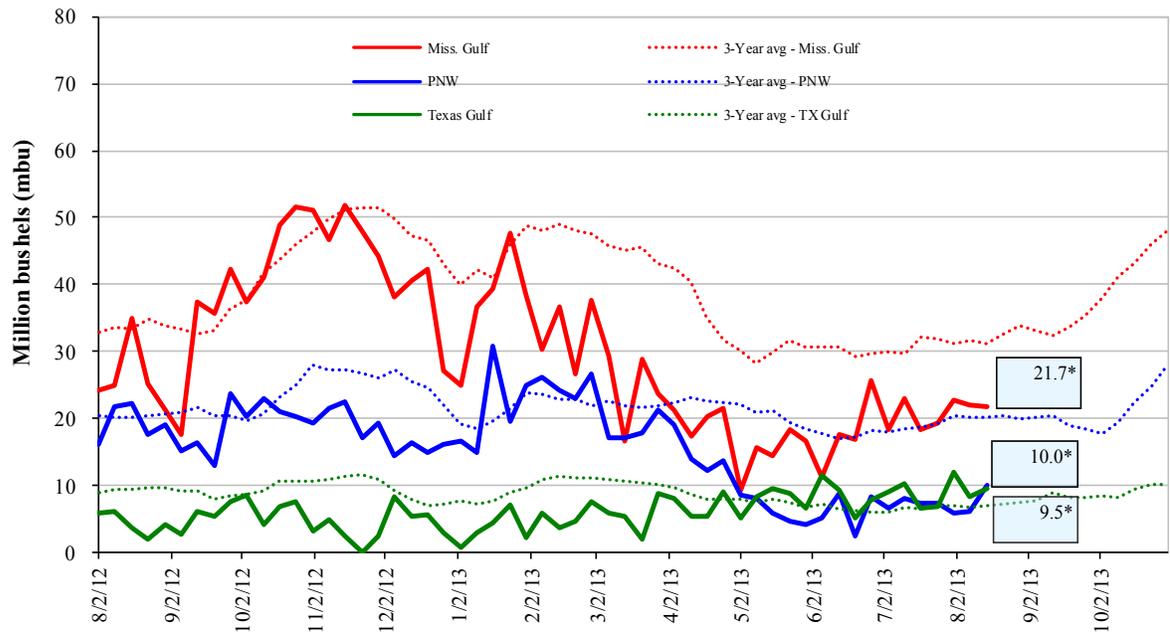


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

Aug. 15 % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	down 1	up 12	up 3	up 60
Last year (same week)	down 38	up 157	down 19	down 55
3-yr avg (4-wk mov. avg)	down 25	up 39	down 13	down 52

Ocean Transportation

Table 17

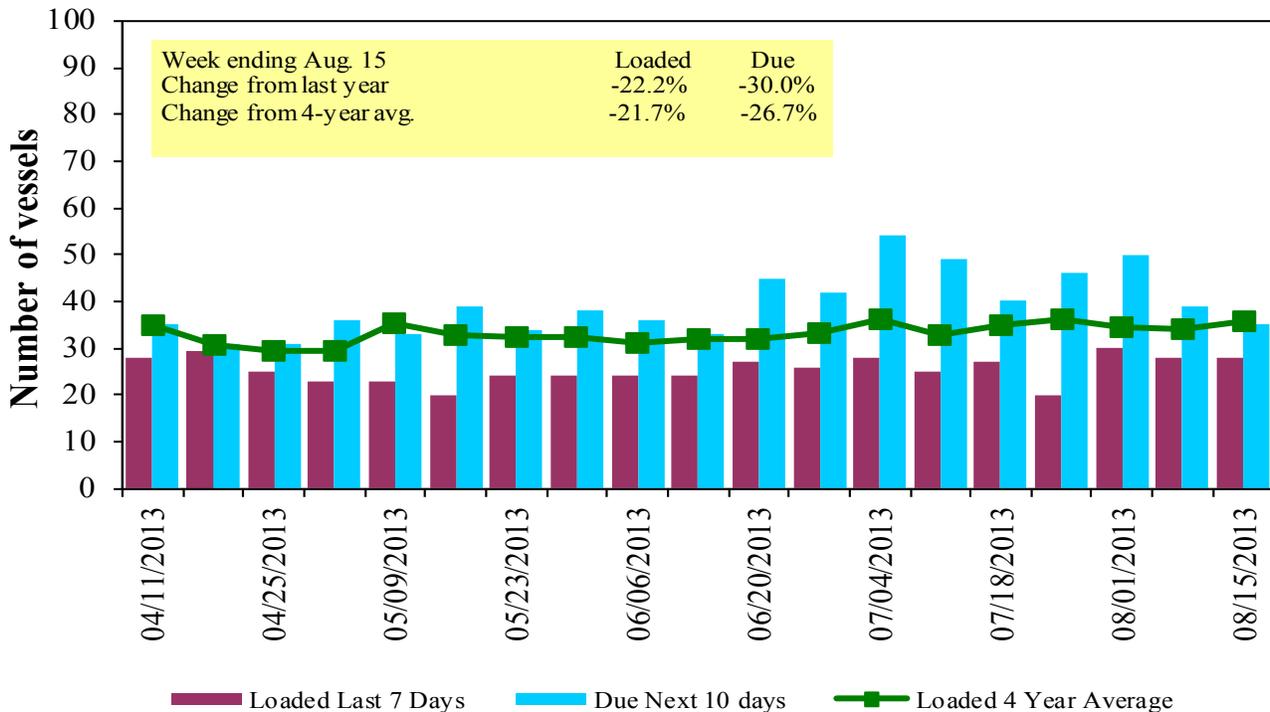
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
8/15/2013	28	28	35	11	n/a
8/8/2013	33	28	39	9	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. Gulf¹ Vessel Loading Activity

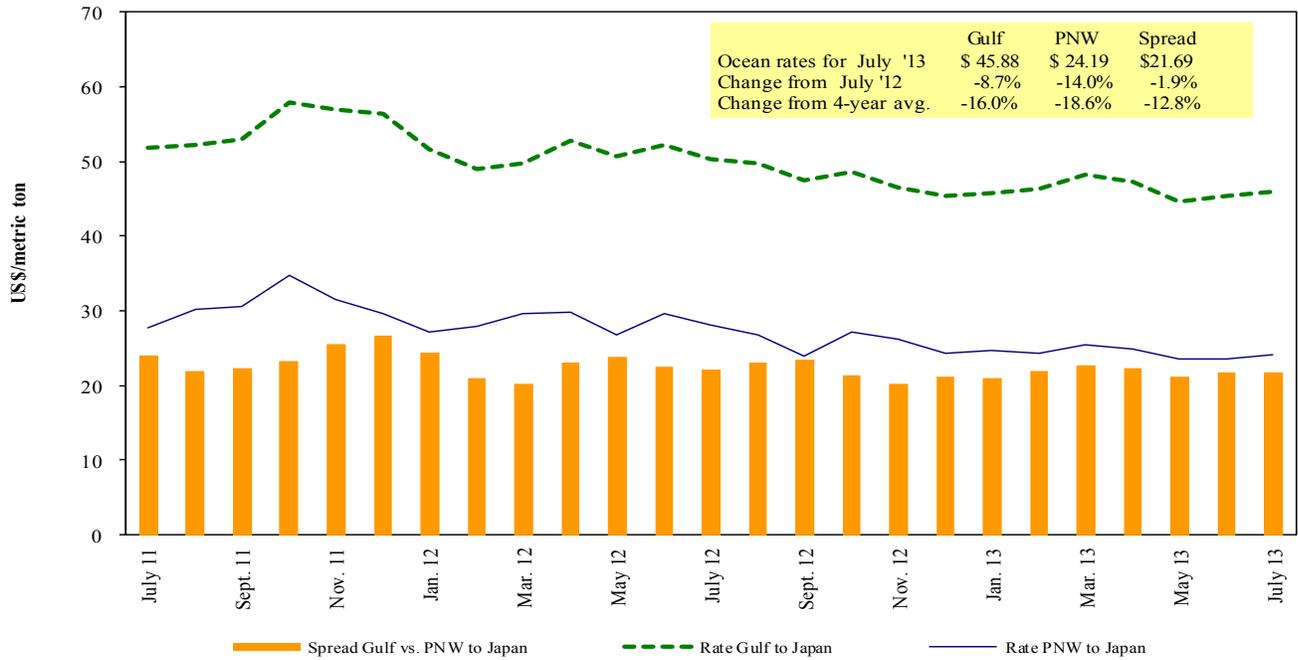


Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 08/17/2013

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jul 10/20	55,000	42.00
U.S. Gulf	China	Heavy Grain	Oct 1/Dec 31	55,000	33.00
PNW	Italy	Heavy Grain	Jul 31/Aug 3	70,000	30.50
PNW	Bangladesh ¹	Wheat	Jun 10/20	4,610	98.00
Brazil	China	Heavy Grain	Aug 20/30	60,000	34.25
Brazil	China	Heavy Grain	Aug 1/15	60,000	34.75
Brazil	China	Heavy Grain	Jul 20/30	60,000	34.50
Brazil	China	Heavy Grain	Jul 1/10	60,000	34.00
Brazil	China	Heavy Grain	Jun 25/Jul 5	60,000	32.50
Brazil	China	Heavy Grain	Jul 1/30	65,000	36.00
Brazil	S. Korea	Heavy Grain	Aug 14/19	60,000	35.50
Brazil	Portugal	Corn	Jul 12/29	60,000	21.50
France	Saudi Arabia	Barley	Aug 1/5	64,000	29.50
Germany	South Africa	Wheat	Aug 20/25	31,000	33.50
River Plate	China	Heavy Grain	Aug 1/10	60,000	39.50
River Plate	Egypt	Heavy Grain	Jul 1/10	50,000	33.00
Russia	Saudi Arabia	Barley	Aug 15/20	60,000	23.75
Ukraine	Kenya	Wheat	July 19/24	35,000	36.50

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

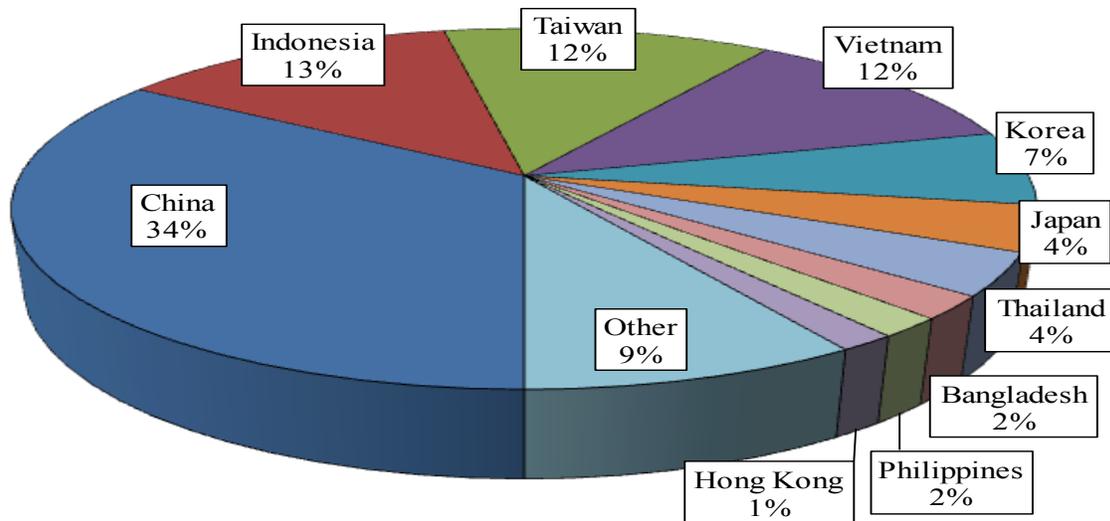
¹50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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, May 2013

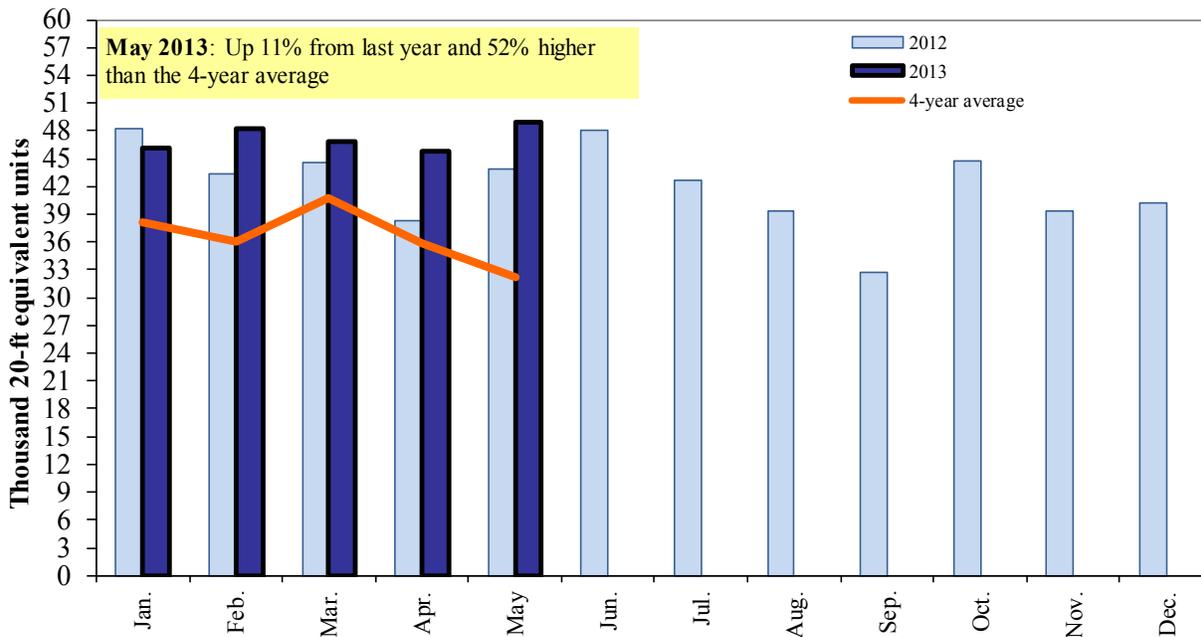


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report*. August 22, 2013. Web: <http://dx.doi.org/10.9752/TS056.08-22-2013>

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