United States Department of Agriculture

Grain Transportation Report

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

Contact Us

November 20, 2014

Contents

The next release is November 27, 2014

WEEKLY HIGHLIGHTS

Associations Request Immediate Action to Resolve West Coast Port Congestion and Longshore Labor Negotiations

On November 17, 2014, 61 agriculture associations sent a letter to President Obama requesting immediate action to resolve congestion, slowdowns, and terminal closures that have disrupted exports and imports on the West Coast. The associations urged the President to reach out to labor and management, bring in a federal mediator to help resolve the issues and, in the event of a strike or lockout, invoke the Taft-Hartley Act to keep the ports open. More than 65 percent of U.S. containerized agricultural exports moved through West Coast ports in 2013. Those commodities include nearly 50 percent of all U.S. containerized grain exports, followed by meat, vegetables, grocery items, cotton, edible nuts, and fruit.

Weekly Grain Inspections Reach Record

For the week ending November 13, **total inspections of grain** (corn, wheat, soybeans) from all major export regions reached a record 3.69 million metric tons (mmt), up 10 percent from the past week, up 1.4 percent from last year, and 34 percent above the 3-year average. The increase was caused by record soybean inspections (1.97 mmt) in the Mississippi Gulf, up 38 percent from the past week. Total inspections of soybeans, destined primarily to China, reached a record 3.16 mmt, up 25 percent from the previous week. Total inspections of soybeans accounted for 86 percent of total grain inspected for the week. Wheat and corn inspections dropped 60 and 24 percent from the previous week.

Grain Tonnages Above Average, While Rates Drop to Near Average Levels

Year-to-date grain barge tonnages on the locking portion of the Mississippi River system are 14 percent higher than the 5-year average and the highest since 2009. For the week ending November 15, soybeans represent 69 percent of the downbound tonnages, while corn shipments are 31 percent of the grain tonnages. Based on the 5-year average, soybeans are typically 50 percent and corn is 47 percent of the total downbound tonnages during the fourth quarter. As of November 18, weather conditions have weaken barge demand and reduced barge rates, and rates have decreased for principle origins. Currently, the spot barge rate for export grain from St. Louis is $21.71 per ton, 19 percent lower than last week and 8 percent higher than the 3-year average.

Snapshots by Sector

Rail

U.S. railroads originated 22,270 **carloads of grain** during the week ending November 8, down 7 percent from last week, down 6 percent from last year, and 4 percent higher than the 3-year average.

During the week ending November 13, average November non-shuttle **secondary railcar bids/offers per car** were $550 above tariff, down $63 from last week and $125 higher than last year. Average shuttle bids/offers per car were $100 above tariff, down $282 from last week and $400 lower than last year.

Barge

During the week ending November 15, **barge grain movements** totaled 1,060,503 tons, about the same as the previous week and 23 percent higher than the same period last year.

During the week ending November 15, 674 grain barges **moved down river**, up 1.5 percent from last week; 1,019 grain barges were **unloaded in New Orleans**, up 4.4 percent from the previous week.

Ocean

During the week ending November 13, 47 **ocean-going grain vessels** were loaded in the Gulf, 16 percent less than the same period last year. Seventy-two vessels are expected to be loaded within the next 10 days, 6 percent more than the same period last year.

During the week ending November 14, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $44.75 per mt, down 2 percent from the previous week. The cost of shipping from the PNW to Japan was $24.50 per mt, down 2 percent from the previous week.

Fuel

During the week ending November 17, U.S. average **diesel fuel prices** decreased 2 cents from the previous week to $3.66 per gallon—down 16 cents from the same week last year.

Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* November 20, 2014.
Web: http://dx.doi.org/10.9752/TS056.11-20-2014

Feature Article/Calendar

Higher Barge Rates Pushed Up Ocean Transportation Costs; But Landed Costs Fell

Higher barge rates pushed up the cost of shipping seaborne U.S. grain to Mexico during the third quarter, despite decreases in truck and ocean freight rates. The cost of shipping corn and soybeans from Illinois to Vera Cruz, Mexico, increased by 10 percent, and the cost of shipping Kansas wheat increased by 11 percent during the quarter (see table below). On the other hand, the cost of shipping Iowa corn and Nebraska soybeans overland to Guadalajara, Mexico, remained unchanged, and the cost of transporting Kansas wheat overland increased by just 1 percent from the previous quarter.

Quarterly costs of transporting U.S. grain to Guadalajara, Mexico

	Water route (to Veracruz) $/metric ton					Land route (to Guadalajara) $/metric ton				
	2013	2014	2014	Percent change		2013	2014	2014	Percent change	
	3rd qtr.	2nd qtr.	3rd qtr.	Yr. to Yr.	Qtr. to Qtr.	3rd qtr.	2nd qtr.	3rd qtr.	Yr. to Yr.	Qtr. to Qtr.
Corn										
Origin			IL					IA		
Truck	13.38	14.59	11.70	-12.6	-19.8	4.46	4.71	4.75	6.5	0.8
Rail [1]						86.52	90.01	89.63	3.6	-0.4
Ocean[2]	17.85	15.48	13.56	-24.0	-12.4					
Barge	18.77	18.98	28.74	53.1	51.4					
Total transportation cost	50.00	49.05	54.00	8.0	10.1	90.98	94.72	94.38	3.7	-0.4
Farm Value	237.13	187.52	149.20	-37.1	-20.4	247.89	183.19	146.71	-40.8	-19.9
Landed Cost	287.13	236.57	203.20	-29.2	-14.1	338.87	277.91	241.09	-28.9	-13.2
Transport % of landed cost	17	21	27			27	34	39		
Soybeans										
Origin			IL					NE		
Truck	13.38	14.59	11.70	-12.6	-19.8	4.46	4.71	4.75	6.5	0.8
Rail [1]						90.69	94.54	94.18	3.8	-0.4
Ocean[2]	17.85	15.48	13.56	-24.0	-12.4					
Barge	18.77	18.98	28.74	53.1	51.4					
Total transportation cost	50.00	49.05	54.00	8.0	10.1	95.15	99.25	98.93	4.0	-0.3
Farm Value	529.11	527.88	440.92	-16.7	-16.5	509.51	525.43	440.92	-13.5	-16.1
Landed Cost	579.11	576.93	494.92	-14.5	-14.2	604.66	624.68	539.85	-10.7	-13.6
Transport % of landed cost	9	9	11			16	16	18		
Wheat										
Origin			KS					KS		
Truck	22.50	30.72	28.05	24.7	-8.7	4.46	4.71	4.75	6.5	0.8
Rail [1]						91.42	76.50	77.43	-15.3	1.2
Ocean[2]	17.85	15.48	13.56	-24.0	-12.4					
Barge	14.47	11.00	21.99	52.0	99.9					
Total transportation cost	54.82	57.20	63.60	16.0	11.2	95.88	81.21	82.18	-14.3	1.2
Farm Value	255.61	266.64	221.07	-13.5	-17.1	255.61	266.64	221.07	-13.5	-17.1
Landed Cost	310.43	323.84	284.67	-8.3	-12.1	351.49	347.85	303.25	-13.7	-12.8
Transport % of landed cost	18	18	22			27	23	27		

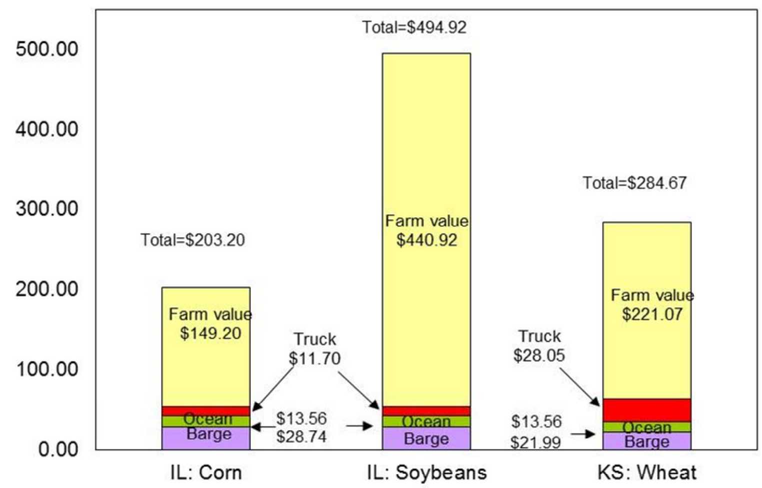
[1] Rail rates include U.S. and Mexico portions of the movement. Mexico rail rates are estimated based on actual quoted market rates. BNSF and Union Pacific quoted rail tariff rates are through rates for shuttle trains. Rail rates include fuel surcharges. Origins are modified from past tables. Rail rates for water route were revised from previous estimates

[2] Source: O'Neil Commodity Consulting

The increase in the water route transportation costs was caused mainly by higher barge rates during the quarter. Barge rates increased in anticipation of a record harvest and from higher demand for barge services. Truck rates for the water route declined during the quarter. In addition, ocean freight rates for shipping bulk grains fell during the quarter due to the excess vessel supply in the market. For the land route, truck rates increased by 1 percent. Tariff rail rates increased by 1 percent for wheat, but remained unchanged for corn and soybeans.

With the exception of Kansas wheat transported via the land route, year-to-year transportation costs increased for all grains and across all routes. Farm prices fell from quarter to quarter and year to year causing quarter-to-quarter and year-to-year decreases in the landed costs. The landed costs ranged from $203.20 to $494.92 for the water route (see table and figure 1) and $241.09 to $539.85 for the land route (see table and figure 2). The fall in farm prices caused the transportation share of the landed costs to increase across all grains and routes. The transportation share of the landed costs for the water route ranged from 11 to 27 percent, and 18 to 39 percent for the land route.

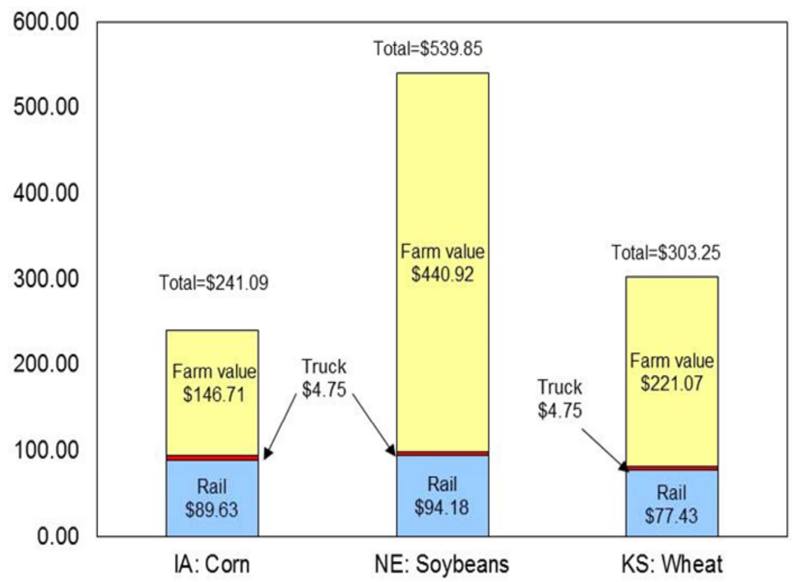
Figure 1. Water route shipment costs ($/mt) to Veracruz, Mexico



Source: USDA, Agricultural Marketing Service

Market Outlook: Mexico is expected to import about 10.4 million metric tons (mmt) of corn during the marketing year (MY) 2014/15 (***FAS, GAIN Report #:MX4073***). This is slightly lower than the initial estimate because of the higher-than-previously estimated domestic production. However, Mexico imported 2.9 mmt of U.S. corn—82 percent more than the same period a year earlier. Mexico also imported 18 percent more soybeans compared to the same period a year ago, totaling 0.56 mmt. Mexico imported 0.97 mmt of U.S. wheat, 13 percent less compared to a year ago. Mexico is expected to import 4.45 mmt of wheat during the MY 2014/15. This is more than the initial estimate due to lower-than-expected domestic production and the need for more bread wheat, such as hard red winter and hard red spring varieties (***FAS, GAIN Report #:MX4073***). If the current low commodity prices and ocean freight rates persist, it will make U.S. grain shipments to Mexico more competitive. *surajudeen.olowolayemo@ams.usda.gov*

Figure 2. Land route shipment costs ($/mt) to Guadalajara, Mexico



Source: USDA, Agricultural Marketing Service

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
Week ending		Unit Train	Shuttle		Gulf	Pacific
11/19/14	246	276	219	372	200	174
11/12/14	247	279	231	426	203	177

[1]Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = near-month secondary rail market bid and monthly tariff ra with fuel surcharge ($/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	11/14/2014	11/7/2014
Corn	IL--Gulf	-1.11	-1.14
Corn	NE--Gulf	-1.22	-1.27
Soybean	IA--Gulf	-1.67	-1.71
HRW	KS--Gulf	-1.67	-1.88
HRS	ND--Portland	-4.19	-4.18

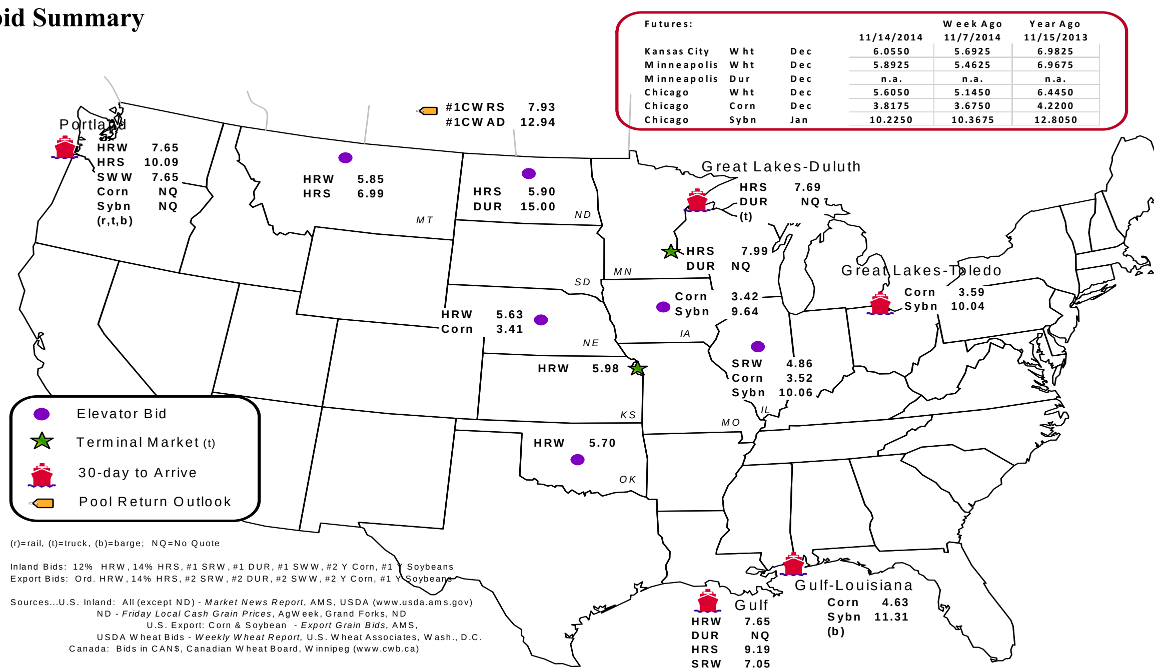
Note: nq = no quote

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 Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-Border Mexico[3]
11/12/2014[p]	2,087	1,526	7,173	1,018	11,804	11/8/2014	1,345
11/05/2014[r]	1,972	1,471	8,758	1,285	13,486	11/1/2014	1,504
2014 YTD[r]	33,355	72,495	213,304	25,011	344,165	2014 YTD	85,959
2013 YTD[r]	21,392	64,596	134,637	18,322	238,947	2013 YTD	59,735
2014 YTD as % of 2013 YTD	156	112	158	137	144	% change YTD	144
Last 4 weeks as % of 2013[2]	99	129	116	83	110	Last 4wks % 2013	85
Last 4 weeks as % of 4-year avg.[2]	153	123	159	102	146	Last 4wks % 4 yr	87
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 aproximately 15 percent below the Association of American Railroads reported weekly carloads received by Mexican railroads to reflect switching between KCSM and FerroMex.

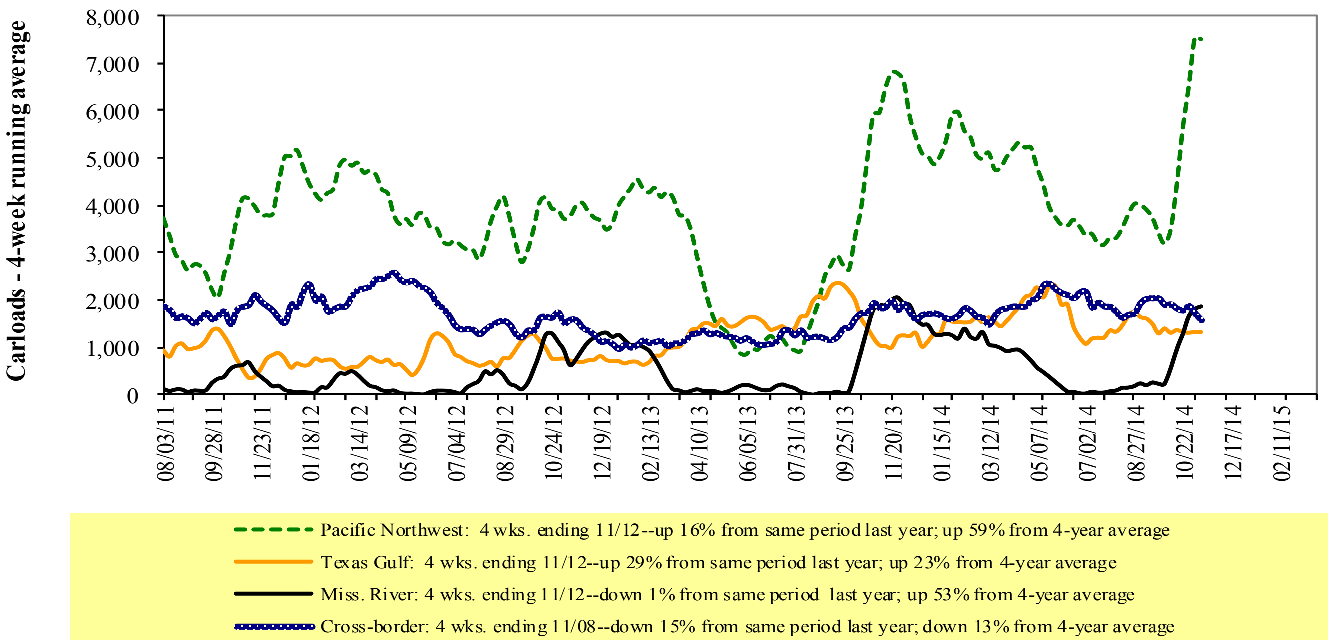
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)

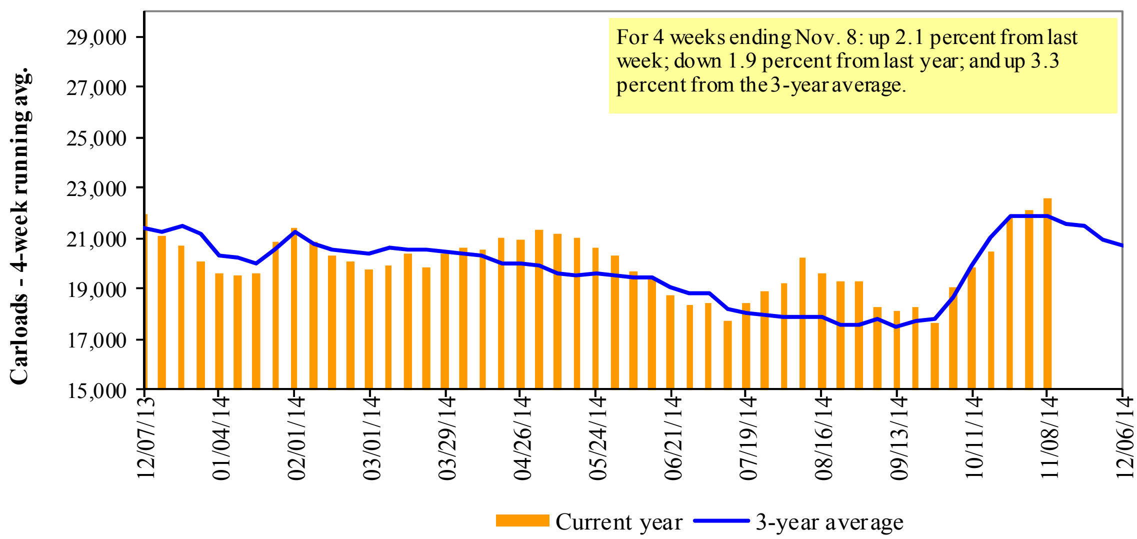
Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
11/08/14	2,563	3,375	9,943	886	5,503	22,270	5,653	4,648
This week last year	2,462	4,390	10,328	994	5,570	23,744	6,240	6,947
2014 YTD	84,407	127,165	397,609	40,233	251,681	901,095	202,845	235,630
2013 YTD	69,575	114,120	392,974	28,533	182,431	787,633	158,912	235,975
2014 YTD as % of 2013 YTD	121	111	101	141	138	114	128	100
Last 4 weeks as % of 2013	90	75	105	103	106	98	104	83
Last 4 weeks as % of 3-yr avg.[1]	107	90	99	140	122	105	118	85
Total 2013	86,466	137,915	454,262	34,412	222,258	935,313	190,125	272,753

[1]As 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 Offerings[1] ($/car)[2]

Week ending	Delivery period							
11/13/2014	**Nov-14**	**Nov-13**	**Dec-14**	**Dec-13**	**Jan-15**	**Jan-14**	**Feb-15**	**Feb-14**
BNSF[3]								
COT grain units	no offer	no offer	no offer	no offer	no offer	no offer	no offer	no offer
COT grain single-car[5]	no offer	no offer	no offer	no offer	no offer	no offer	no offer	no offer
UP[4]								
GCAS/Region 1	no offer	no offer	no offer	no bids	no offer	no bids	n/a	n/a
GCAS/Region 2	no offer	no offer	no offer	no bids	no offer	no bids	n/a	n/a

[1]Auction offerings are for single-car and unit train shipments only.

[2]Average premium/discount to tariff, last auction

[3]BNSF - COT = Certificate of Transportation; north grain and south grain bids were combined effective the week ending 6/24/06.

[4]UP - 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.

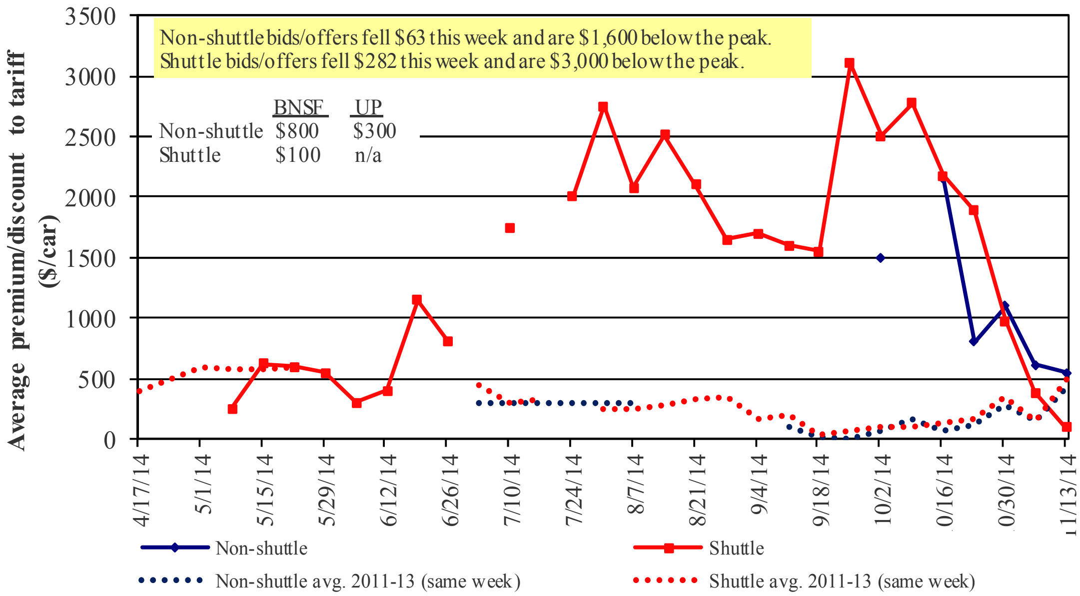
[5]Range is shown because average is not available. Not available = n/a.

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 November 2014, Secondary Market

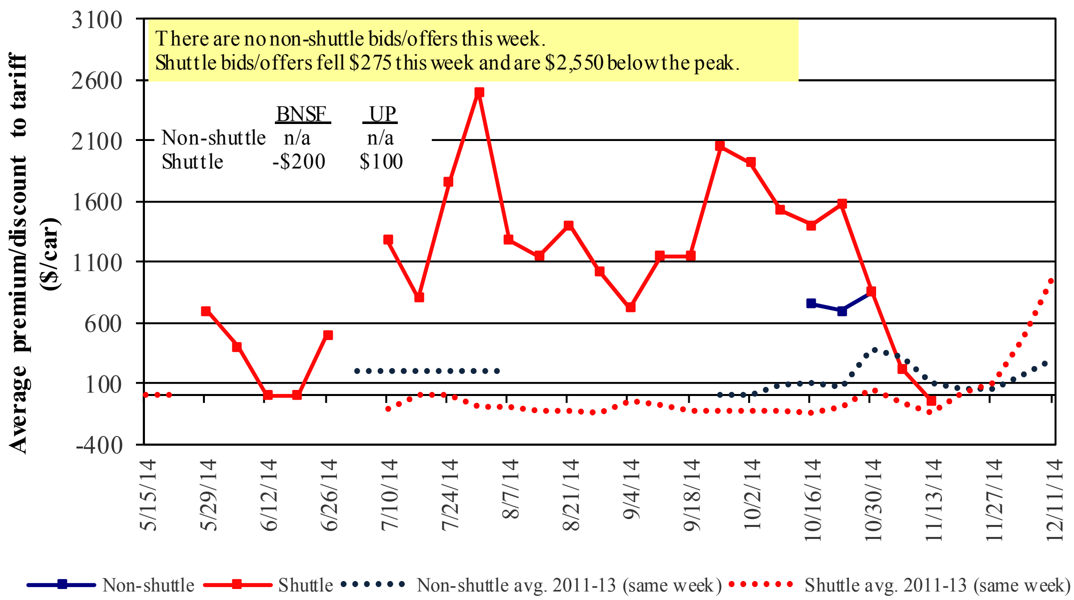


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

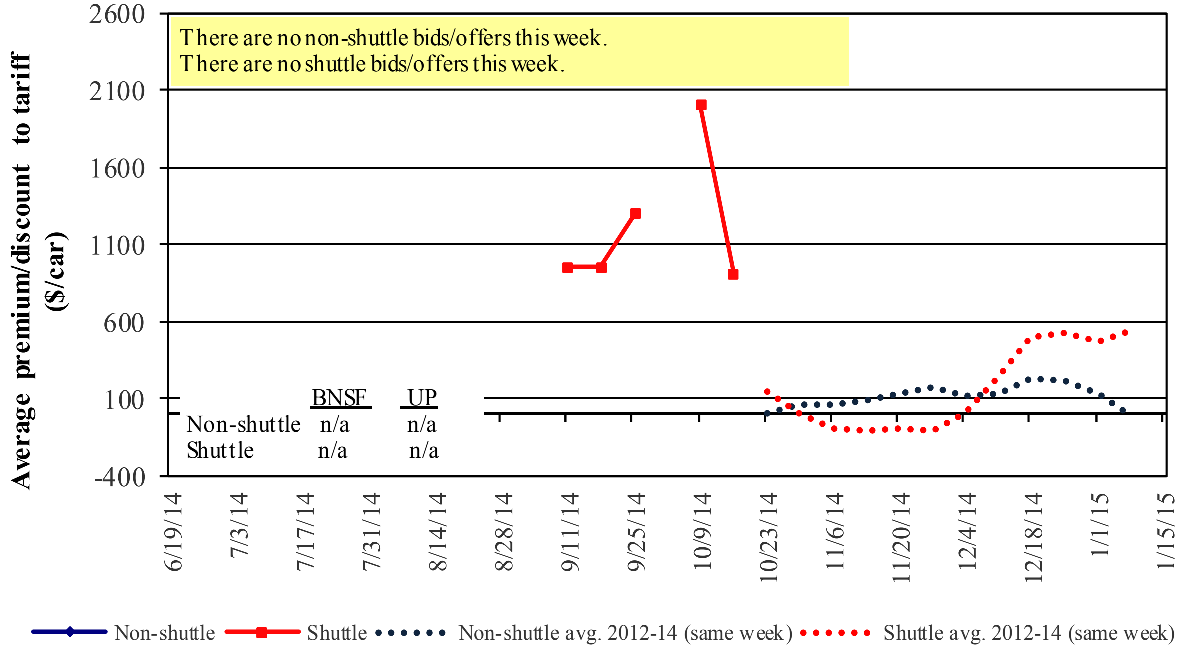


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in January 2015, 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					
11/13/2014	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15
Non-shuttle						
BNSF-GF	800	n/a	n/a	n/a	n/a	n/a
Change from last week	-	n/a	n/a	n/a	n/a	n/a
Change from same week 2013	300	n/a	n/a	n/a	n/a	n/a
UP-Pool	300	n/a	n/a	n/a	n/a	n/a
Change from last week	(125)	n/a	n/a	n/a	n/a	n/a
Change from same week 2013	(50)	n/a	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	100	(200)	n/a	n/a	n/a	n/a
Change from last week	(463)	n/a	n/a	n/a	n/a	n/a
Change from same week 2013	(400)	(517)	n/a	n/a	n/a	n/a
UP-Pool	n/a	100	n/a	n/a	n/a	n/a
Change from last week	n/a	(125)	n/a	n/a	n/a	n/a
Change from same week 2013	n/a	225	n/a	n/a	n/a	n/a

[1]Average premium/discount to tariff, $/car-last week
[2]Shuttle bids are a new data series; prior to this we provided only non-shuttle rates.
Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,
n/a = not available; GF = guaranteed freight; Pool = guaranteed pool
Sources: Transportation and Marketing Programs/AMS/USDA
Data from James B. Joiner Co., Tradewest Brokerage Co.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments[1]

Effective date: 11/1/2014	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[3]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$3,387	$172	$35.34	$0.96	5
	Grand Forks, ND	Duluth-Superior, MN	$3,596	$98	$36.69	$1.00	0
	Wichita, KS	Los Angeles, CA	$6,244	$505	$67.02	$1.82	-1
	Wichita, KS	New Orleans, LA	$4,026	$303	$42.99	$1.17	4
	Sioux Falls, SD	Galveston-Houston, TX	$5,824	$414	$61.95	$1.69	-1
	Northwest KS	Galveston-Houston, TX	$4,293	$332	$45.92	$1.25	4
	Amarillo, TX	Los Angeles, CA	$4,492	$461	$49.19	$1.34	3
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,328	$342	$36.45	$0.93	3
	Toledo, OH	Raleigh, NC	$4,875	$390	$52.28	$1.33	3
	Des Moines, IA	Davenport, IA	$2,168	$72	$22.25	$0.57	4
	Indianapolis, IN	Atlanta, GA	$4,211	$293	$44.72	$1.14	3
	Indianapolis, IN	Knoxville, TN	$3,593	$188	$37.54	$0.95	3
	Des Moines, IA	Little Rock, AR	$3,308	$213	$34.96	$0.89	2
	Des Moines, IA	Los Angeles, CA	$5,365	$620	$59.43	$1.51	1
Soybeans	Minneapolis, MN	New Orleans, LA	$3,699	$372	$40.43	$1.10	5
	Toledo, OH	Huntsville, AL	$3,807	$277	$40.55	$1.10	2
	Indianapolis, IN	Raleigh, NC	$4,946	$392	$53.01	$1.44	3
	Indianapolis, IN	Huntsville, AL	$3,499	$188	$36.61	$1.00	3
	Champaign-Urbana, IL	New Orleans, LA	$3,974	$342	$42.86	$1.17	4
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,678	$290	$39.41	$1.07	-1
	Wichita, KS	Galveston-Houston, TX	$3,471	$226	$36.71	$1.00	-9
	Chicago, IL	Albany, NY	$4,140	$365	$44.74	$1.22	3
	Grand Forks, ND	Portland, OR	$5,159	$502	$56.21	$1.53	-1
	Grand Forks, ND	Galveston-Houston, TX	$6,084	$522	$65.60	$1.79	-1
	Northwest KS	Portland, OR	$5,260	$544	$57.63	$1.57	3
Corn	Minneapolis, MN	Portland, OR	$5,000	$611	$55.72	$1.42	-1
	Sioux Falls, SD	Tacoma, WA	$4,960	$559	$54.81	$1.39	-1
	Champaign-Urbana, IL	New Orleans, LA	$3,147	$342	$34.65	$0.88	3
	Lincoln, NE	Galveston-Houston, TX	$3,510	$326	$38.09	$0.97	-1
	Des Moines, IA	Amarillo, TX	$3,690	$268	$39.30	$1.00	2
	Minneapolis, MN	Tacoma, WA	$5,000	$606	$55.67	$1.41	-1
	Council Bluffs, IA	Stockton, CA	$4,400	$627	$49.92	$1.27	-1
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,520	$559	$60.37	$1.64	-1
	Minneapolis, MN	Portland, OR	$5,530	$611	$60.98	$1.66	-1
	Fargo, ND	Tacoma, WA	$5,430	$497	$58.86	$1.60	-1
	Council Bluffs, IA	New Orleans, LA	$4,425	$394	$47.86	$1.30	4
	Toledo, OH	Huntsville, AL	$2,982	$277	$32.36	$0.88	3
	Grand Island, NE	Portland, OR	$5,360	$557	$58.75	$1.60	3

[1]A 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.

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

[3]Percentage change year over year calculated using tariff rate plus fuel surchage

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: 11/1/2014				**Fuel**			**Percent**
	Origin		**Tariff**	**surcharge**	**Tariff plus surcharge per:**		**change**
Commodity	**state**	**Destination region**	**rate/car**[1]	**per car**[2]	**metric ton**[3]	**bushel**[3]	**Y/Y**[4]
Wheat	MT	Chihuahua, CI	$6,760	$531	$74.49	$2.03	5
	OK	Cuautitlan, EM	$6,465	$644	$72.64	$1.97	0
	KS	Guadalajara, JA	$7,049	$623	$78.39	$2.13	-15
	TX	Salinas Victoria, NL	$3,852	$243	$41.84	$1.14	29
Corn	IA	Guadalajara, JA	$8,049	$732	$89.72	$2.28	0
	SD	Celaya, GJ	$7,656	$694	$85.32	$2.17	-1
	NE	Queretaro, QA	$7,535	$650	$83.64	$2.12	2
	SD	Salinas Victoria, NL	$5,880	$528	$65.47	$1.66	-1
	MO	Tlalnepantla, EM	$6,887	$632	$76.82	$1.95	1
	SD	Torreon, CU	$6,722	$581	$74.62	$1.89	-1
Soybeans	MO	Bojay (Tula), HG	$8,111	$618	$89.19	$2.42	2
	NE	Guadalajara, JA	$8,572	$707	$94.80	$2.58	0
	IA	El Castillo, JA	$8,855	$690	$97.53	$2.65	-1
	KS	Torreon, CU	$6,989	$438	$75.88	$2.06	1
Sorghum	TX	Guadalajara, JA	$6,953	$452	$75.66	$1.92	2
	NE	Celaya, GJ	$7,287	$630	$80.89	$2.05	-1
	KS	Queretaro, QA	$6,795	$396	$73.47	$1.86	-3
	NE	Salinas Victoria, NL	$5,500	$464	$60.93	$1.55	-3
	NE	Torreon, CU	$6,318	$517	$69.84	$1.77	-1

[1]Rates 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.

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

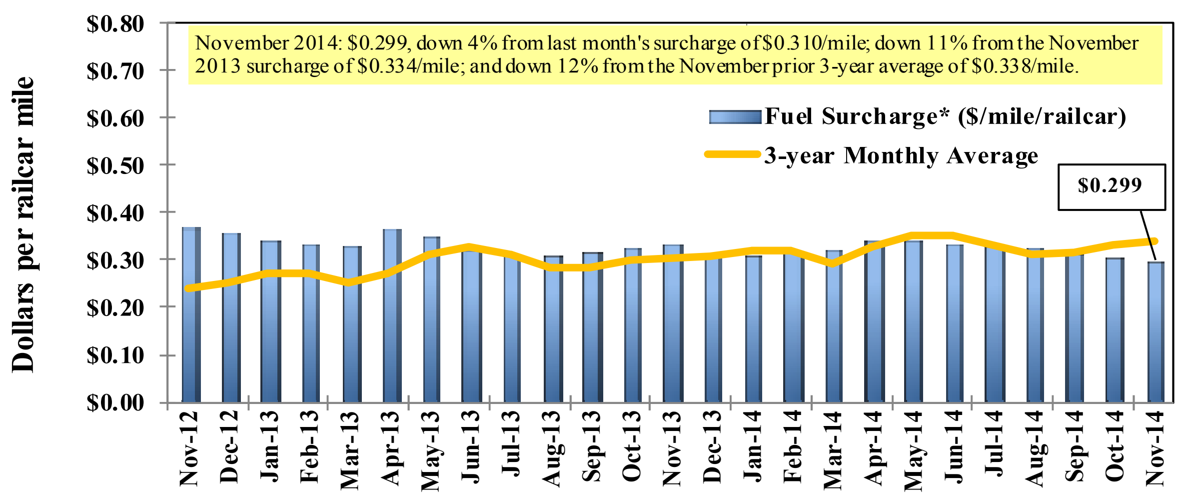
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[4]Percentage change year over year calculated using tariff rate plus fuel surchage

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average[1]



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

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

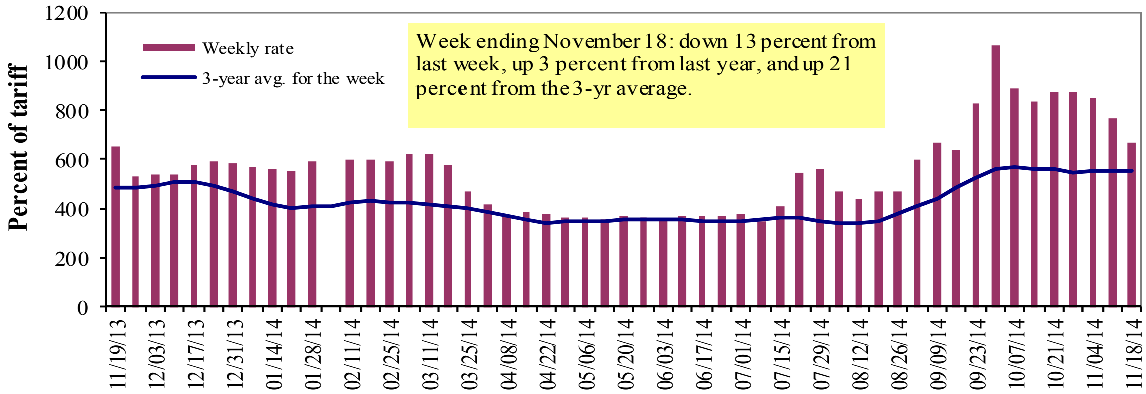
** BNSF strike price (diesel price when fuel surcharges begin) changed from $1.25/gal. to $2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was $0.227/mile instead of $0.331/mile.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate[1,2]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-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
Rate[1]	11/18/2014	-	708	669	544	699	699	475
	11/11/2014	642	725	767	675	733	733	542
$/ton	11/18/2014	-	37.67	31.04	21.71	32.78	28.24	14.92
	11/11/2014	39.74	38.57	35.59	26.93	34.38	29.61	17.02
Current week % change from the same week:								
	Last year	-	30	3	-12	0	0	-15
	3-year avg. [2]	-	36	21	8	28	28	10
Rate[1]	December	-	-	606	465	533	533	394
	February	-	-	539	406	470	470	400

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds;

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

(Rate * 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.

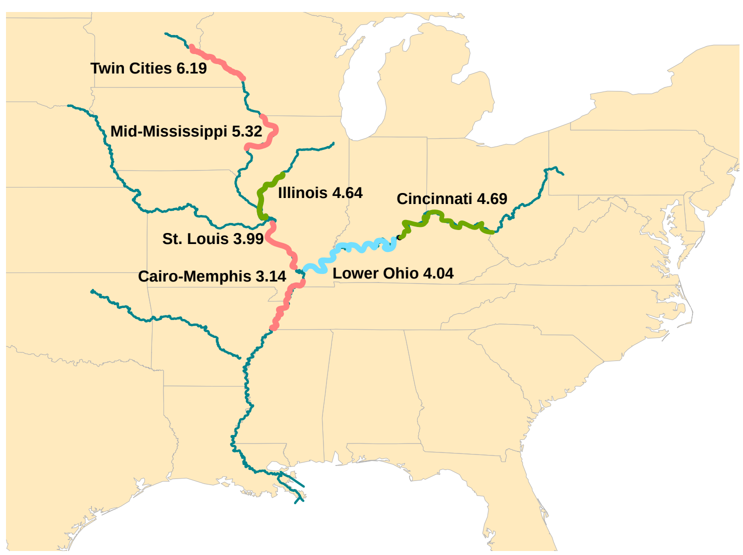
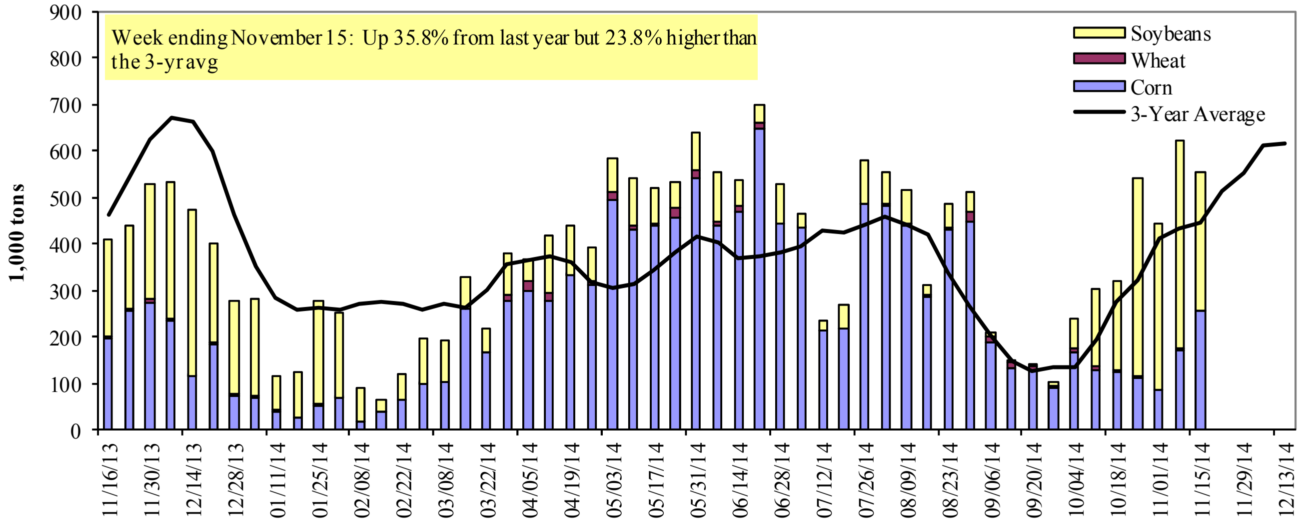


Figure 10

Barge Movements on the Mississippi River[1] (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 11/15/2014	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	53	0	96	0	149
Winfield, MO (L25)	153	0	294	2	449
Alton, IL (L26)	275	0	327	2	603
Granite City, IL (L27)	256	0	298	2	556
Illinois River (L8)	117	0	46	0	162
Ohio River (L52)	72	2	330	0	404
Arkansas River (L1)	0	1	99	0	101
Weekly total - 2014	328	3	727	2	1,061
Weekly total - 2013	360	25	463	15	863
2014 YTD[1]	18,583	2,112	8,917	218	29,831
2013 YTD	7,610	3,987	7,471	214	19,282
2014 as % of 2013 YTD	244	53	119	102	155
Last 4 weeks as % of 2013[2]	78	34	131	64	110
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.

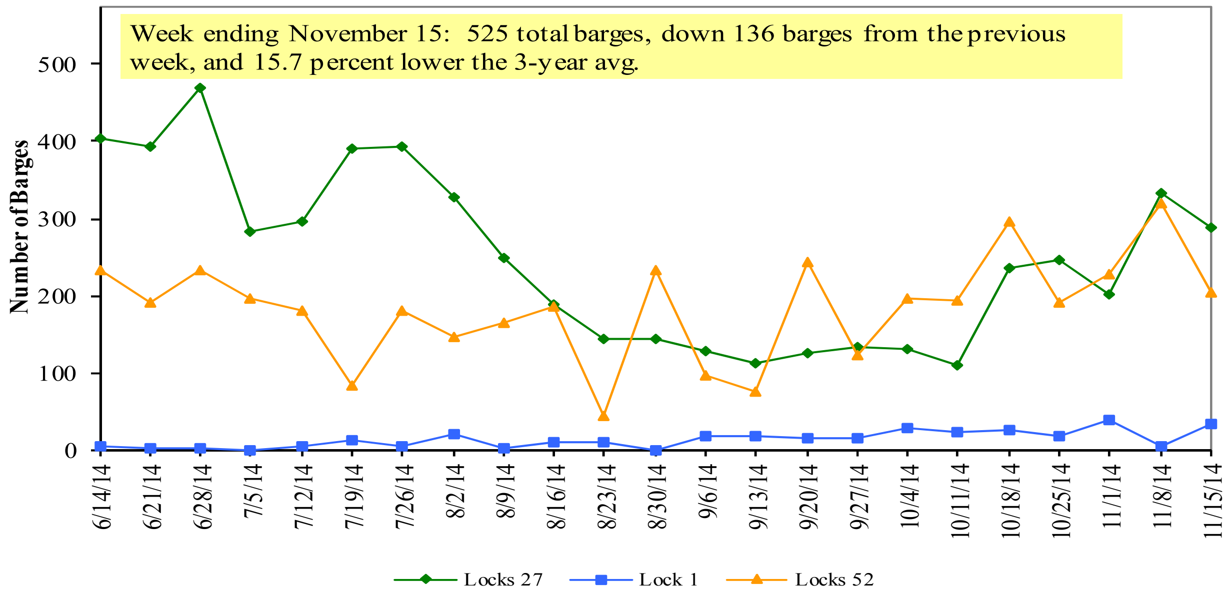
[2] As a percent of same period in 2013.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers

Figure 11

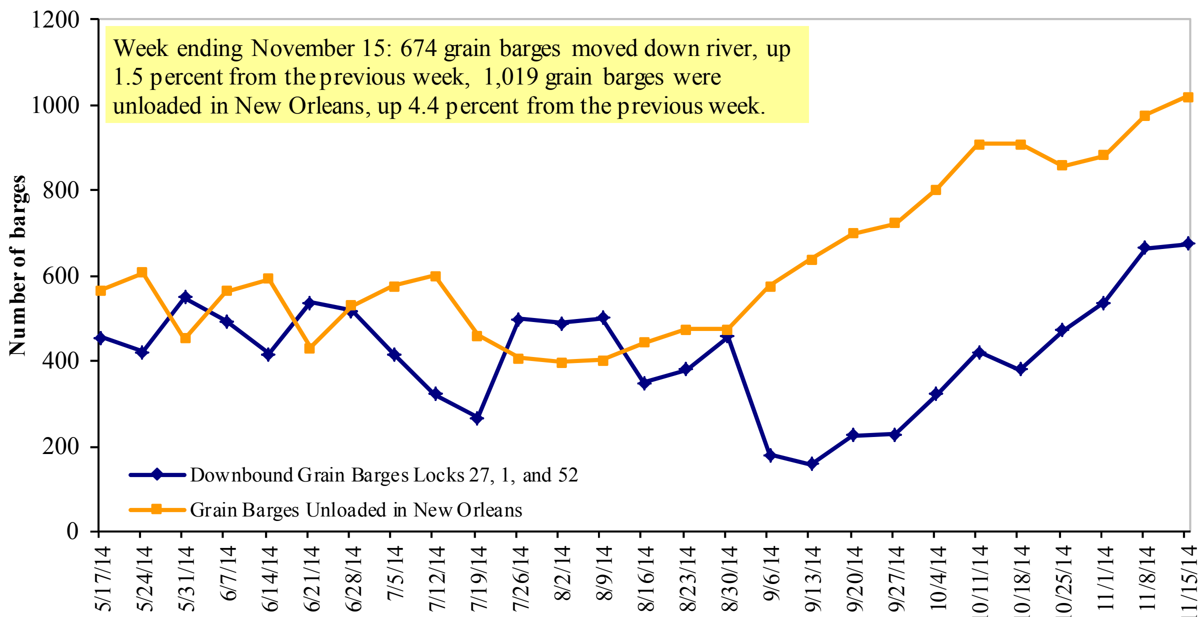
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 Prices[1], Week Ending 11/17/2014 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.542	-0.026	-0.299
	New England	3.633	-0.026	-0.348
	Central Atlantic	3.612	-0.022	-0.278
	Lower Atlantic	3.469	-0.028	-0.310
II	Midwest[2]	3.786	-0.002	-0.008
III	Gulf Coast[3]	3.542	-0.020	-0.203
IV	Rocky Mountain	3.767	-0.029	-0.069
V	West Coast	3.762	-0.020	-0.192
	West Coast less California	3.720	0.008	-0.152
	California	3.797	-0.044	-0.225
Total	U.S.	3.661	-0.016	-0.161

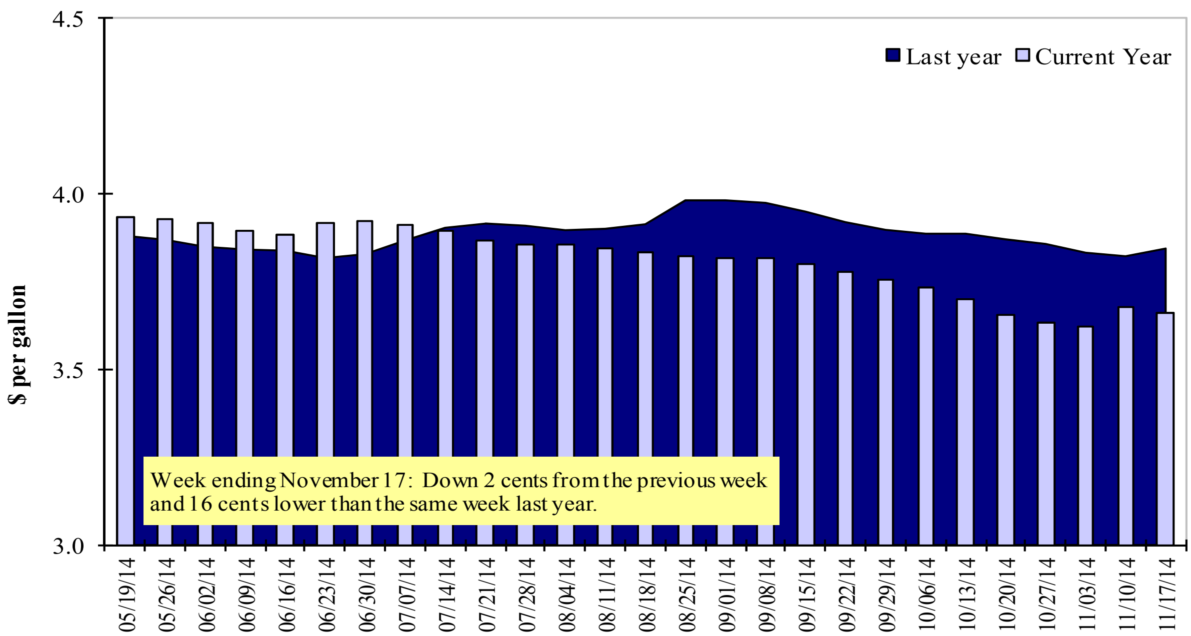
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[2]Same as North Central [3]Same 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)

	Wheat						Corn	Soybeans	Total
Week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances[1]									
11/6/2014	1,470	920	1,555	891	94	4,929	12,218	24,081	41,228
This week year ago	1,537	1,161	1,390	963	79	5,130	17,853	22,929	45,912
Cumulative exports-marketing year[2]									
2014/15 YTD	3,548	1,990	3,383	1,725	246	10,892	7,508	12,639	31,039
2013/14 YTD	6,393	4,953	2,665	1,873	181	16,066	5,305	11,076	32,447
YTD 2014/15 as % of 2013/14	55	40	127	92	136	68	142	114	96
Last 4 wks as % of same period 2013/14	98	79	102	85	117	93	69	112	93
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293

[1] Current unshipped export sales to date

[2] Shipped export sales to date; new marketing year in effect 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 Importers[1] of U.S. Corn

Week ending 11/06/2014	**Total Commitments**[2]		**% change**	**Exports**[3]
	2014/15	**2013/14**	**current MY**	**3-year avg**
	Current MY	**Last MY**	**from last MY**	**2011-2013**
	- 1,000 mt -			**- 1,000 mt -**
Japan	3,468	3,684	(6)	10,079
Mexico	5,173	6,385	(19)	8,145
Korea	550	469	17	2,965
Colombia	1,673	882	90	3,461
Taiwan	291	363	(20)	1,238
Top 5 Importers	**11,155**	**11,782**	**(5)**	**25,887**
Total US corn export sales	**19,726**	**23,157**	**(15)**	**34,445**
% of Projected	44%	48%		
Change from prior week	505	1,203		
Top 5 importers' share of U.S. corn export sales	57%	51%		75%
USDA forecast, November 2014	**44,450**	**48,700**	**(9)**	
Corn Use for Ethanol USDA forecast, November 2014	**130,810**	**130,302**	**0.4**	

(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 Ranking Reports - http://apps.fas.usda.gov/export-sales/myrkaug.htm; 3-yr average

Table 14

Top 5 Importers[1] of U.S. Soybeans

Week Ending 11/06/2014	Total Commitments[2] 2014/15 Current MY	2013/14 Last MY	% change current MY from last MY	Exports[3] 3-yr avg. 2011-13
	- 1,000 mt -			- 1,000 mt -
China	22,927	21,815	5	24,211
Mexico	1,544	1,180	31	2,971
Indonesia	794	793	0	1,895
Japan	764	813	(6)	1,750
Taiwan	811	787	3	1,055
Top 5 importers	**26,840**	**25,388**	**6**	**31,882**
Total US soybean export sales	**36,720**	**34,005**	**8**	**39,169**
% of Projected	78%	76%		
Change from prior week*	1,074	778		
Top 5 importers' share of U.S. soybean export sales	73%	75%		**81%**
USDA forecast, November 2014	**46,810**	**44,820**	**4**	

(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. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers[1] of All U.S. Wheat

Week Ending 11/06/2014	Total Commitments[2] 2014/15 Current MY	2013/14 Last MY	% change current MY from last MY	Exports[3] 3-yr avg 2011-2013
	- 1,000 mt -			- 1,000 mt -
Japan	1,751	1,434	22	3,243
Mexico	1,739	2,013	(14)	3,066
Nigeria	1,657	1,653	0	2,960
Philippines	1,356	1,178	15	2,006
China	205	4,026	(95)	1,830
Brazil	1,492	3,151	(53)	1,617
Korea	925	836	11	1,552
Taiwan	612	609	1	969
Indonesia	349	542	(36)	813
Colombia	414	439	(6)	610
Top 10 importers	**10,498**	**15,881**	(34)	**18,665**
Total US wheat export sales	**15,822**	**21,196**	**(25)**	**27,696**
% of Projected	63%	66%		
Change from prior week*	418	288		
Top 10 importers' share of U.S. wheat export sales	66%	75%		67%
USDA forecast, November 2014	**25,170**	**32,010**	**(21)**	

(n) indicates negative number.

[1] Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 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.

Table 16

Grain Inspections for Export by U.S. Port Region (1,000 metric tons)

Port regions	Week ending 11/13/14	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 2013	Last 4-weeks as % of 3-yr. avg.	Total[1] 2013
Pacific Northwest									
Wheat	54	113	48	10,970	10,408	105	56	48	11,585
Corn	0	0	n/a	7,470	1,575	474	35	18	2,973
Soybeans	830	822	101	8,866	7,358	120	126	184	9,090
Total	**884**	**936**	**94**	**27,307**	**19,341**	**141**	**109**	**131**	**23,647**
Mississippi Gulf									
Wheat	0	29	0	4,224	9,205	46	35	38	9,711
Corn	312	414	75	27,742	12,259	226	97	113	14,828
Soybeans	1,966	1,202	164	21,230	15,597	136	121	144	21,462
Total	**2,278**	**1,646**	**138**	**53,196**	**37,061**	**144**	**111**	**131**	**46,002**
Texas Gulf									
Wheat	55	110	50	5,780	8,305	70	51	71	9,039
Corn	0	0	n/a	510	163	313	n/a	0	255
Soybeans	0	150	0	543	713	76	59	112	908
Total	**55**	**260**	**21**	**6,833**	**9,181**	**74**	**55**	**84**	**10,203**
Interior									
Wheat	19	10	189	1,246	957	130	91	68	1,244
Corn	81	102	79	4,999	3,130	160	58	52	3,943
Soybeans	184	176	105	3,422	2,787	123	77	163	3,212
Total	**284**	**288**	**99**	**9,666**	**6,875**	**141**	**157**	**97**	**8,399**
Great Lakes									
Wheat	0	55	0	716	737	97	214	207	884
Corn	0	0	n/a	275	0	n/a	n/a	0	0
Soybeans	90	73	123	522	441	118	110	136	699
Total	**90**	**129**	**70**	**1,513**	**1,178**	**128**	**136**	**160**	**1,583**
Atlantic									
Wheat	0	0	n/a	546	645	85	4	5	645
Corn	0	1	n/a	817	225	363	11	24	242
Soybeans	94	105	90	1,341	1,031	130	118	136	1,652
Total	**94**	**106**	**89**	**2,705**	**1,902**	**142**	**91**	**118**	**2,540**
U.S. total from ports[2]									
Wheat	129	318	40	23,482	30,258	78	58	60	33,108
Corn	393	517	76	41,813	17,352	241	77	83	22,241
Soybeans	3,164	2,529	125	35,925	27,927	129	119	154	37,024
Total	**3,685**	**3,364**	**110**	**101,219**	**75,538**	**134**	**104**	**125**	**92,373**

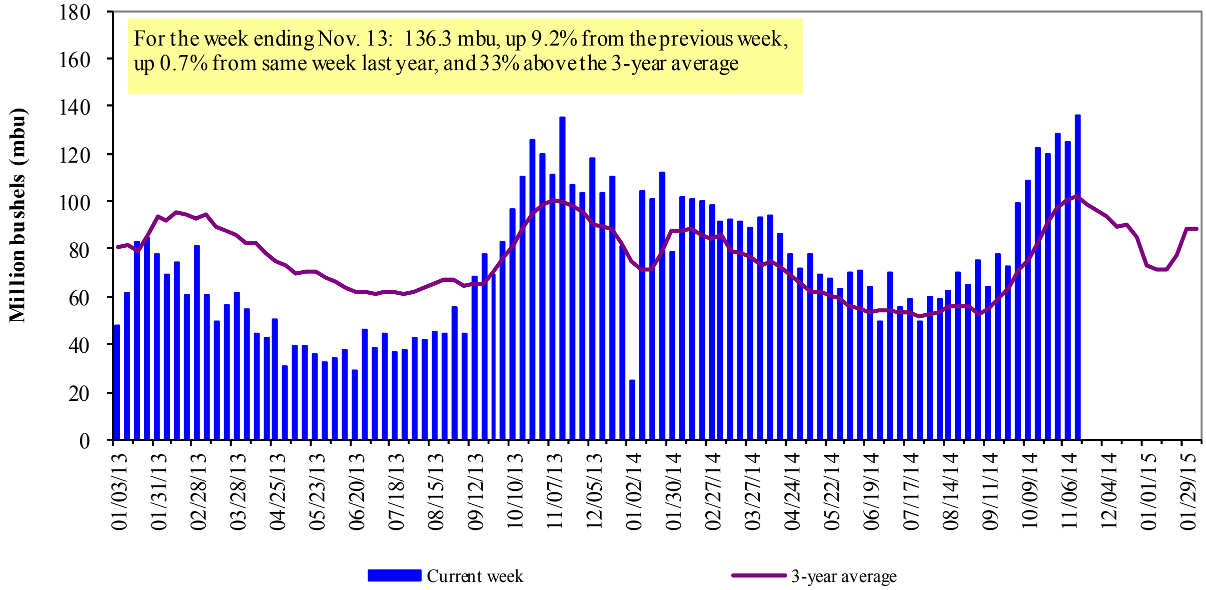
[1] Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

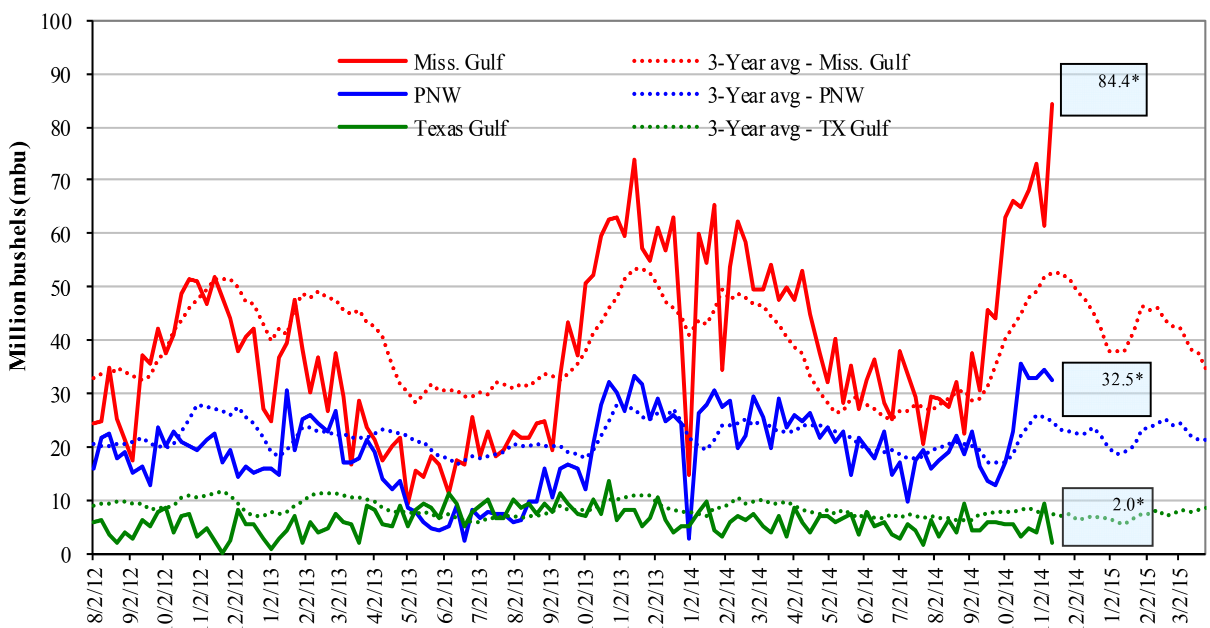


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW[1] (wheat, corn, and soybeans)



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

Nov 13 : % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 37	down 79	up 22	down 6
Last year (same week)	up 14	down 75	up 5	down 3
3-yr avg. (4-wk mov. avg.)	up 53	down 61	up 42	up 420

Table 17

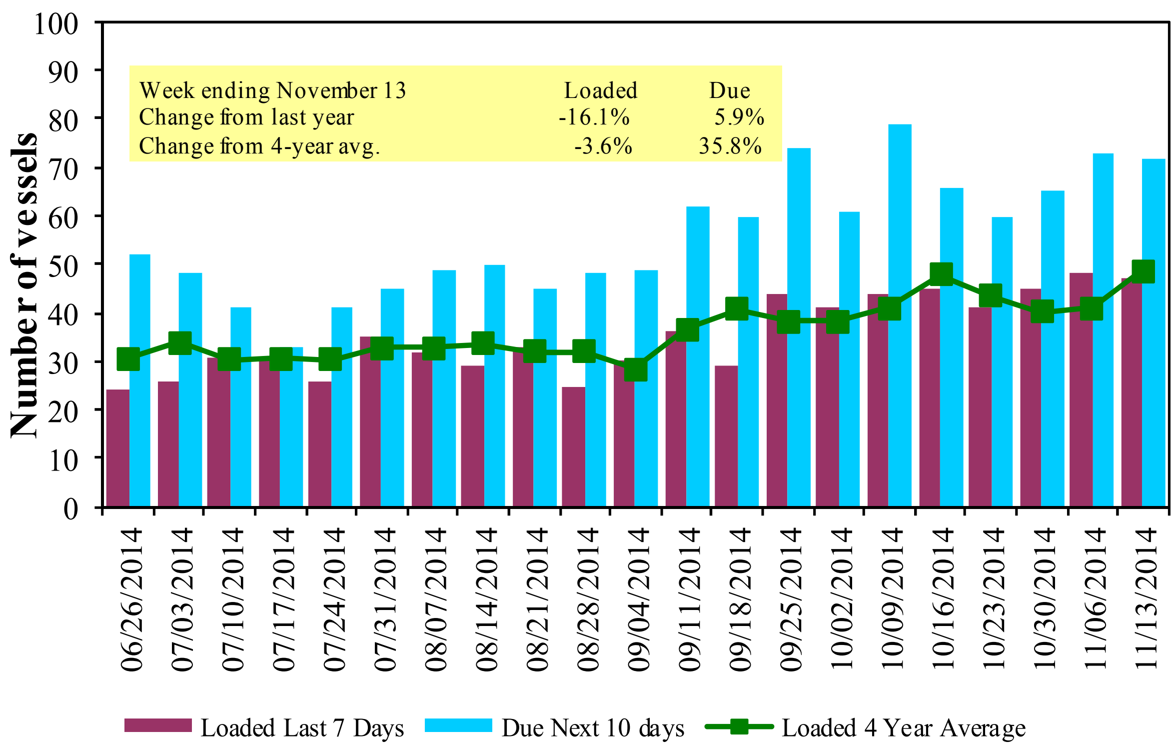
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
11/13/2014	49	47	72	18	n/a
11/6/2014	52	48	73	13	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

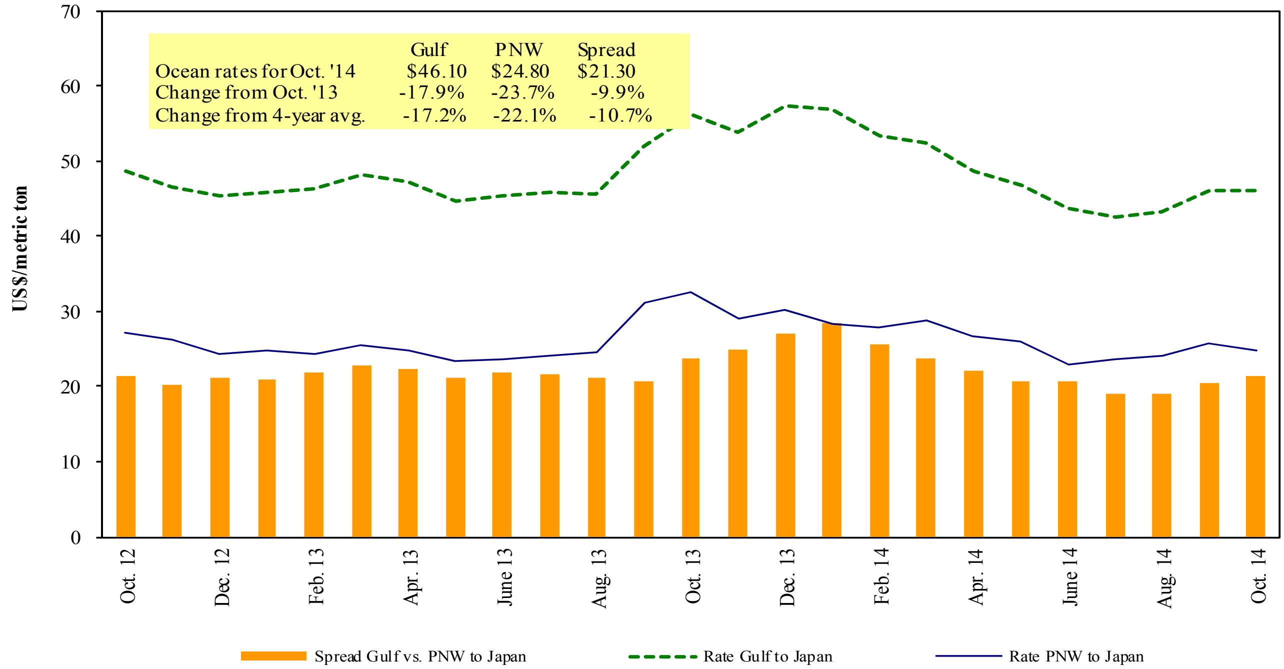
U.S. Gulf[1] Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA
[1]U.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 11/15/2014

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Nov 25/30	60,000	43.00
U.S. Gulf	China	Heavy Grain	Nov 20/30	60,000	44.75
U.S. Gulf	China	Heavy Grain	Nov 15/25	55,000	44.25
U.S. Gulf	China	Heavy Grain	Nov 10/20	60,000	44.25
U.S. Gulf	China	Heavy Grain	Nov 5/15	60,000	45.25
U.S. Gulf	China	Heavy Grain	Nov 1/8	58,000	46.00
U.S. Gulf	China	Heavy Grain	Oct 20/30	55,000	42.15
U.S. Gulf	China	Heavy Grain	Oct 20/30	58,000	44.00
U.S. Gulf	Brazil	Wheat	Nov 8/14	25,000	22.00
U.S. Gulf	Sudan[1]	Sorghum	Nov 20/30	43,440	103.44
PNW	China	Heavy Grain	Nov 1/30	60,000	26.50
PNW	China	Grain	Oct 20/30	60,000	23.00

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

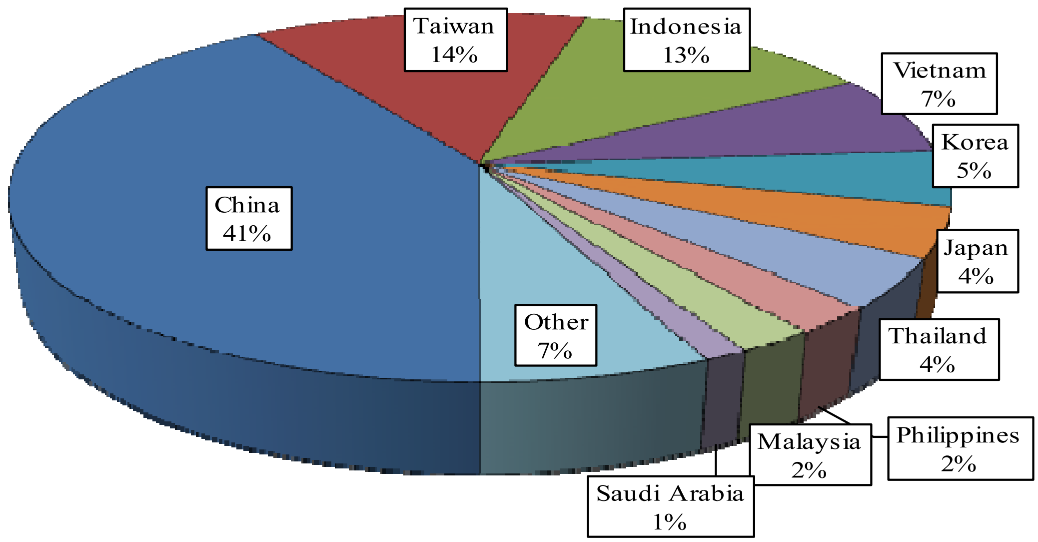
[1]50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

Source: Maritime Research Inc. (www.maritime-research.com)

In 2013, containers were used to transport 10 percent of total U.S. waterborne grain exports, up 2 percentage points from 2012. Approximately 61 percent of U.S. waterborne grain exports in 2013 went to Asia, of which 16 percent were moved in containers. Asia is the top destination for U.S. containerized grain exports—97 percent in 2013.

Figure 18

Top 10 Destination Markets for U.S. Containerized Grain Exports, January-June, 2014

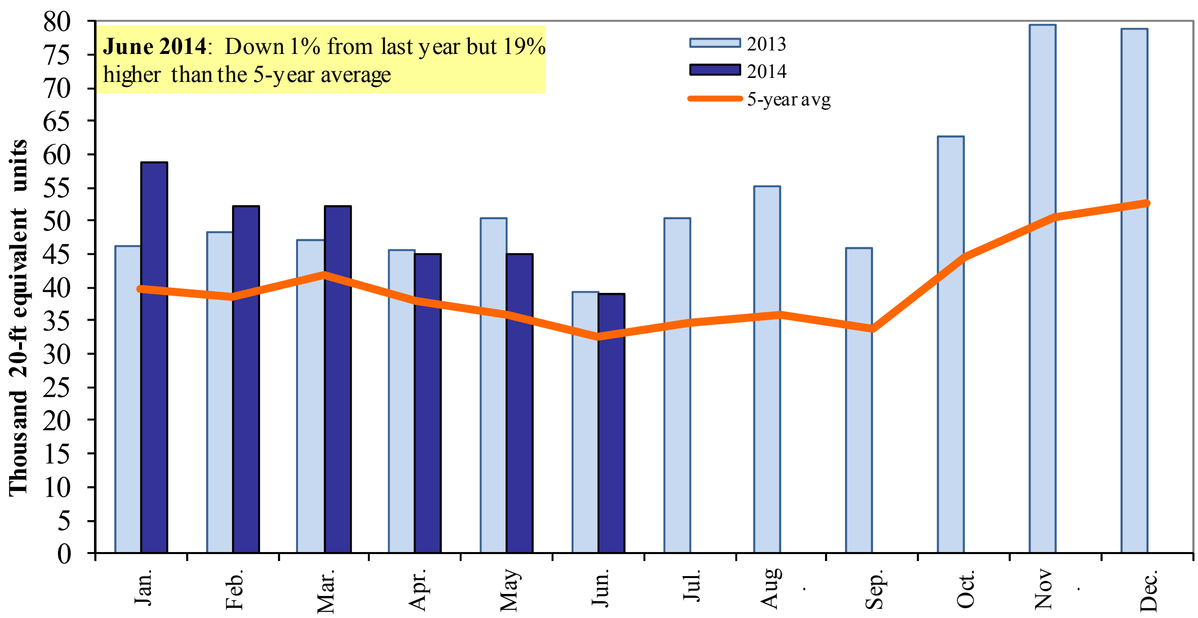


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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,

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.

Contacts and Links

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