Grain Transportation Report

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

Contact Us

November 27, 2014

Contents

The next release is December 4, 2014

WEEKLY HIGHLIGHTS

Parts of Upper Mississippi River Closes Early for Winter

On November 20, the last barge shipment of the season traversed through Mississippi River Lock and Dam 2, near Hasting, MN, as ice conditions on the river made it too difficult for vessels to navigate. The closure of this part of the river normally occurs about a week later, around November 27. Records indicate this unofficial closing of Lock 2 as the earliest since 1969. The 2014 navigation season was also shortened by a late start earlier in the year when an unusually cold winter stopped traffic on parts of the Upper Mississippi River that were frozen until April 16. The U.S. Army Corps of Engineers uses the winter closure time for repair and maintenance of lock structures.

Grain Inspections Continue to Increase

For the week ending November 20, **total inspections of grain** (corn, wheat, and soybeans) from all major export regions continued to increase, reaching a record 3.89 million metric tons (mmt). Grain inspections were up 5 percent from the past week, up 35 percent from last year, and were 47 percent above the 3-year average. The increase in total grain inspections was helped by a rebound in wheat and corn inspections, which increased 255 and 29 percent from the past week.

West Coast Labor Contract Negotiations Take a Break

On November 20, the Pacific Maritime Association (PMA) announced that "big table" labor negotiations for a new West Coast labor contract will break until December 2. Subcommittee negotiations, which involve local port-specific issues, will continue. The International Longshore and Warehouse Union (ILWU) reports these continued negotiations could help with the overall "big table" negotiations. On November 18, a White House spokesman said "They're at the table trying to work it out, and we're confident that there's a way forward. We continue to monitor the situation." On November 21, the chief executive officers of the ports of Tacoma and Seattle urged President Obama to reconsider by assigning federal mediators to help PMA and ILWU resolve pending contract negotiations.

New Publications: Wheat Transportation Profile

This week, AMS released a new report—Wheat Transportation Profile. The report examines the importance of the freight transportation system to wheat producers and consumers here and abroad. The report presents an overview of the U.S. wheat supply-and-demand factors that have transportation implications.

Snapshots by Sector

Export Sales

During the week ending November 13, **unshipped balances of wheat, corn, and soybeans** totaled 39.3 mmt, down 14 percent from the same time last year. Corn weekly net export sales reached 908,000 mt, up 80 percent from the previous week; soybean sales totaled 483,000 mt, down 55 percent, and wheat reached 361,700 mt, down 13 percent.

Rail

U.S. railroads originated 23,313 **carloads of grain** during the week ending November 15, up 5 percent from last week, down 3 percent from last year, and 7 percent higher than the 3-year average.

During the week ending November 20, average December non-shuttle **secondary railcar bids/offers per car** were $284 above tariff, $109 higher than last year. Average shuttle bids/offers per car were $113 below tariff, down $63 from last week and $648 lower than last year.

Barge

During the week ending November 22, **barge grain movements** totaled 967,950 tons—8.7 percent lower than the previous week but 10.4 percent higher than the same period last year.

During the week ending November 22, 609 grain barges **moved down river**, down 9.6 percent from last week; 948 grain barges were **unloaded in New Orleans**, down 7 percent from the previous week.

Ocean

During the week ending November 20, 47 **ocean-going grain vessels** were loaded in the Gulf, 4 percent less than the same period last year. Sixty-three vessels are expected to be loaded within the next 10 days, 6 percent less than the same period last year.

During the week ending November 21, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $44.50 per mt, down 3 percent from the previous week. The cost of shipping from the PNW to Japan was $24 per mt, down 2 percent from the previous week.

Fuel

During the week ending November 24, U.S. average **diesel fuel prices** decreased 3 cents from the previous week to $3.68 per gallon—down 22 cents from the same week last year.

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Web: http://dx.doi.org/10.9752/TS056.11-27-2014

Feature Article/Calendar

Third Quarter Transportation and Landed Costs Down for Wheat

Transportation costs for shipping wheat to Japan decreased through the Pacific Northwest (PNW) and the U.S. Gulf during the third quarter 2014. Falling trucking rates caused most of the drop in transportation costs in the PNW, but lower trucking rates, together with a decrease in rail and ocean rates for shipping from the U.S. Gulf dropped costs through this region (*tables 1*, 2). Transportation costs for shipping wheat from Kansas (KS) to Japan through the PNW decreased 2 percent from the second quarter, and the costs to ship from North Dakota (ND) to Japan via the PNW decreased 4 percent from the second quarter 2014 (*table 1*). Compared to last year, the cost to ship from Kansas and North Dakota through the PNW to Japan also decreased 2 and 4 percent. The costs of shipping wheat from Kansas and North Dakota to Japan through the U.S. Gulf decreased 9 and 4 percent from the second quarter as rates for all modes declined (*table 2*). Compared to last year**,** the costs to ship wheat through the U. S. Gulf from Kansas and North Dakota also decreased 9 and 4 percent. Third quarter wheat transportation costs represented 30 to 36 percent of the landed costs, higher than the second quarter 2014 and the third quarter last year.

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

	KS					ND				
Mode	2013 3rd qtr	2014 2nd qtr	2014 3rd qtr	Year-to-Year change	Quarterly change	2013 3rd qtr	2014 2nd qtr	2014 3rd qtr	Year-to-Year change	Quarterly change
	$/metric ton			%	%	$/metric ton			%	%
Truck	13.39	14.59	11.70	-12.62	-19.81	13.39	14.59	11.70	-12.62	-19.81
Rail[1]	55.75	56.16	58.06	4.14	3.38	56.14	56.32	56.53	0.69	0.37
Ocean vessel	26.63	25.25	24.45	-8.19	-3.17	26.63	25.25	24.45	-8.19	-3.17
Transportation Costs	95.77	96.00	94.21	-1.63	-1.86	96.16	96.16	92.68	-3.62	-3.62
Farm Value[2]	255.61	266.64	221.07	-13.51	-17.09	259.66	245.45	219.24	-15.57	-10.68
Total Landed Cost	351.38	362.64	315.28	-10.27	-13.06	355.82	341.61	311.92	-12.34	-8.69
Transport % of landed cost	27.26	26.47	29.88			27.02	28.15	29.71		

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

	KS					ND				
Mode	2013 3rd qtr	2014 2nd qtr	2014 3rd qtr	Year-to-Year change	Quarterly change	2013 3rd qtr	2014 2nd qtr	2014 3rd qtr	Year-to-Year change	Quarterly change
	$/metric ton			%	%	$/metric ton			%	%
Truck	13.39	14.59	11.70	-12.62	-19.81	13.39	14.59	11.70	-12.62	-19.81
Rail[1]	40.08	40.28	36.92	-7.88	-8.34	66.18	66.34	66.08	-0.15	-0.39
Ocean vessel	47.79	46.39	43.99	-7.95	-5.17	47.79	46.39	43.99	-7.95	-5.17
Transportation Costs	101.26	101.26	92.61	-8.54	-8.54	127.36	127.32	121.77	-4.39	-4.36
Farm Value[2]	255.61	266.64	221.07	-13.51	-17.09	259.66	245.45	219.24	-15.57	-10.68
Total Landed Cost	356.87	367.90	313.68	-12.10	-14.74	387.02	372.77	341.01	-11.89	-8.52
Transport % of landed cost	28.37	27.52	29.52			32.91	34.16	35.71		

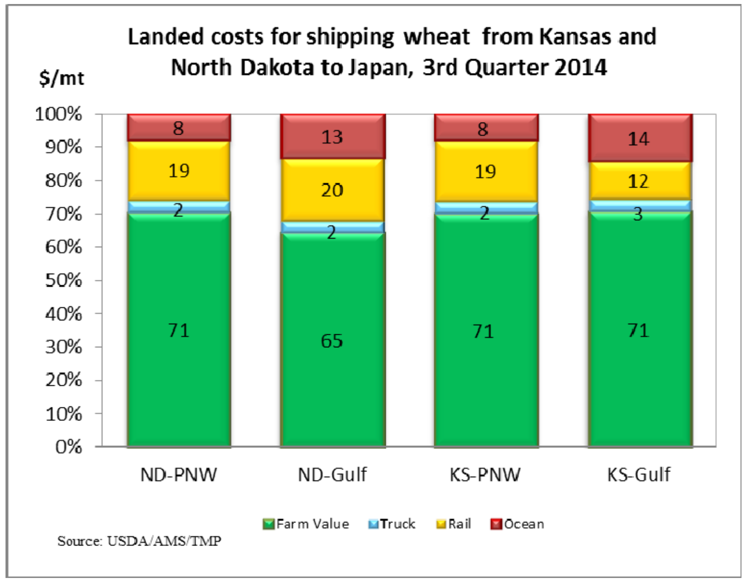
Source: USDA/AMS/TMP

[1] Rail tariff rates include fuel surchrages and revisions for heavy axle railcars and shuttle trains.

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

The total landed cost (farm value plus transportation costs) for shipping wheat to Japan ranged from $312 to $341 per metric ton (mt), below both the previous quarter and last year for each route (*see tables*). Quarter-to-quarter total landed costs decreased as trucking rates dropped notably and farm values continued to fall. Landed costs decreased 13 percent from the previous quarter for shipping wheat through the PNW from Kansas and 9 percent from North Dakota. Year-to-year landed costs for shipping from the PNW decreased 10 and 12 percent due to lower trucking and ocean rates. Landed costs to ship through the U.S. Gulf decreased 15 percent for Kansas and 9 percent for North Dakota, pushed down by lower farm values and modal rates. Year-to-year landed costs decreased 2 and 4 percent for shipping wheat from Kansas through the U.S. Gulf and 9 and 8 percent for shipping from North Dakota (*see tables*).

Third quarter farm values for wheat produced in Kansas accounted for 71 percent of the landed cost for shipping through the PNW and the Gulf, below the second quarter 2014 and last year (*see figure*). North Dakota wheat farm values accounted for 71 and 65 percent of the total landed cost during the third quarter, below the second quarter 2014 and the third quarter last year.



Ocean rates for wheat shipped from the PNW to Japan decreased 3 percent from the second quarter and were 8 percent below last year this time, as vessel capacity remained high (***GTR dated 10/30/14***). Ocean rates for shipping wheat from the Gulf to Japan decreased 5 percent from the second quarter and 8 percent from last year.

Quarter-to-quarter rail rates for shipping wheat from Kansas through the PNW increased 3 percent; rates for shipping from North Dakota were unchanged. Rail rates for wheat shipped through the Gulf decreased 8 percent for Kansas but were less than 1 percent for North Dakota. Kansas and North Dakota rail rates for shipping wheat to the PNW increased 4 and 1 percent year to year. Rail rates from Kansas to the Gulf dropped 8 percent for the same period, while North Dakota rates decreased less than 1 percent (*see table 2*). The cost of moving wheat from each State by truck to a rail-served grain elevator dropped 20 percent quarter-to-quarter due in part to lower diesel prices. Year-to-year trucking rates were down 13 percent as demand for trucking services for wheat declined.

According to the Grain Inspection Packers and Stockyards Administration, the total amount of wheat inspected for export to Japan during the third quarter was 0.5 million mt, down 37 percent from last year at this time, representing 7 percent of total U.S. wheat exports. For the same period, total U.S. wheat exports reached 7.4 million mt, 35 percent below last year. For the 2014/15 marketing year, year-to-date cumulative (shipped) export sales of all wheat are down 33 percent from the past year (*See* ***GTR, Table 12***). *Johnny.Hill@ams.usda.gov*

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
Week ending		Unit Train	Shuttle		Gulf	Pacific
11/26/14	243	261	210	306	195	170
11/19/14	246	276	219	372	200	174

[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)

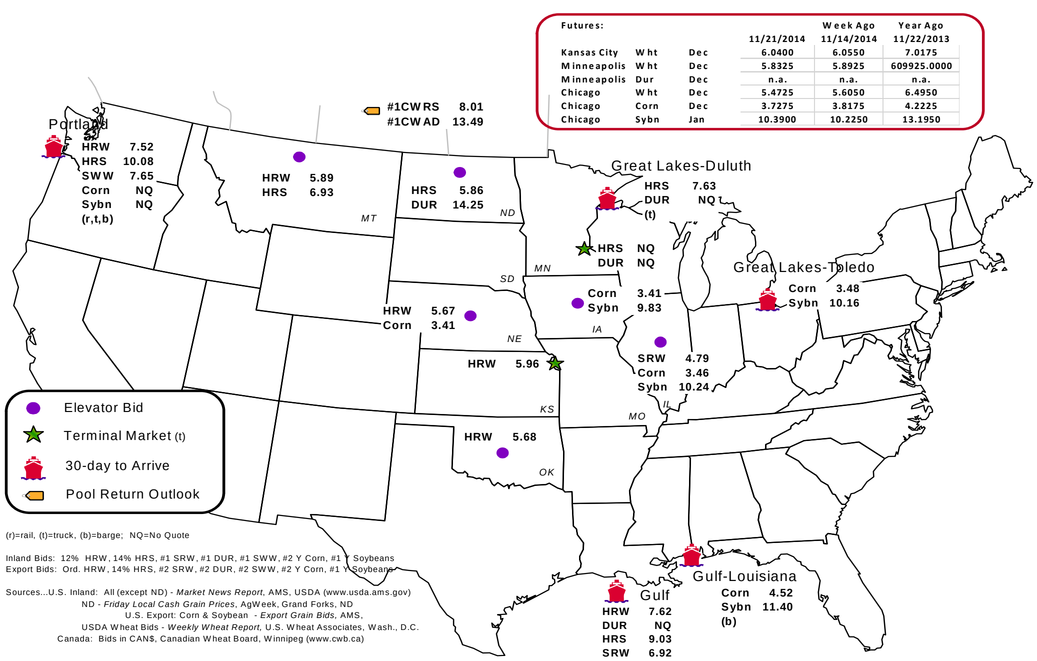
Commodity	Origin--Destination	11/21/2014	11/14/2014
Corn	IL--Gulf	-1.06	-1.11
Corn	NE--Gulf	-1.11	-1.22
Soybean	IA--Gulf	-1.57	-1.67
HRW	KS--Gulf	-1.66	-1.67
HRS	ND--Portland	-4.22	-4.19

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



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]
11/19/2014[p]	1,453	644	5,890	1,024	9,011	11/15/2014	2,096
11/12/2014[r]	2,087	1,526	7,278	1,018	11,909	11/8/2014	1,345
2014 YTD[r]	34,808	73,139	219,299	26,035	353,281	2014 YTD	88,055
2013 YTD[r]	23,706	65,670	141,922	19,600	250,898	2013 YTD	62,080
2014 YTD as % of 2013 YTD	147	111	155	133	141	% change YTD	142
Last 4 weeks as % of 2013[2]	93	128	104	84	102	Last 4wks % 2013	85
Last 4 weeks as % of 4-year avg.[2]	154	113	146	103	137	Last 4wks % 4 yr	94
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.

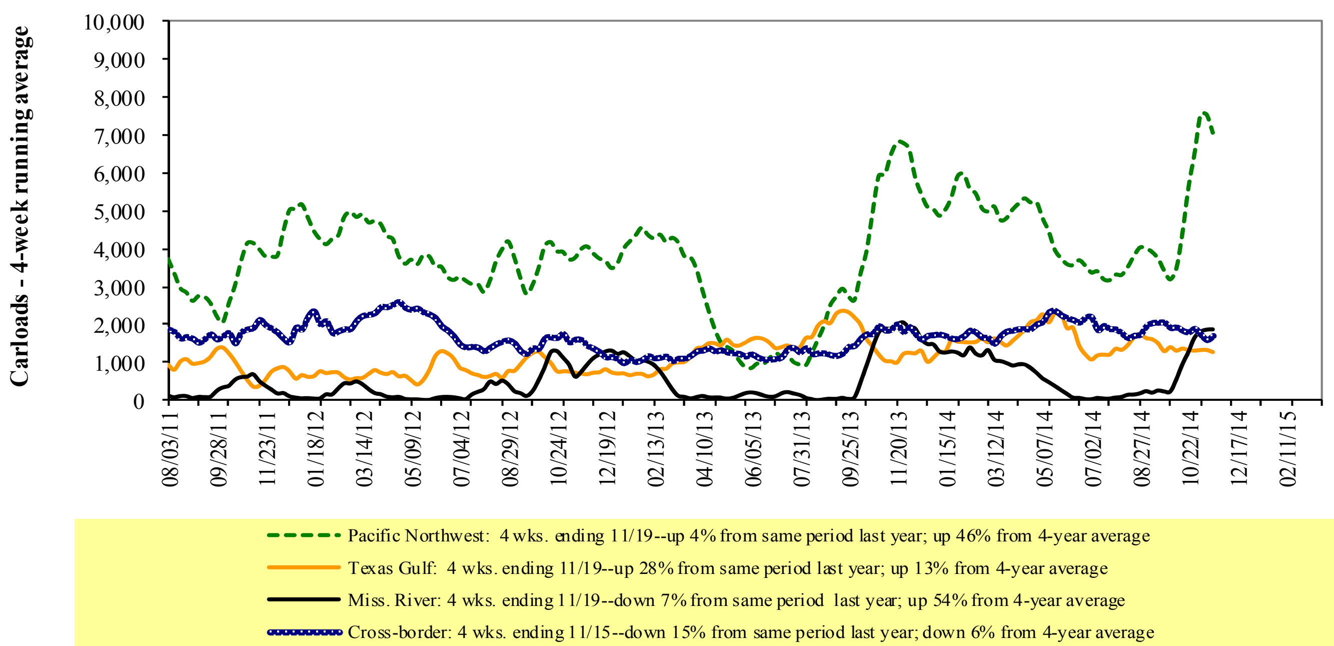
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)

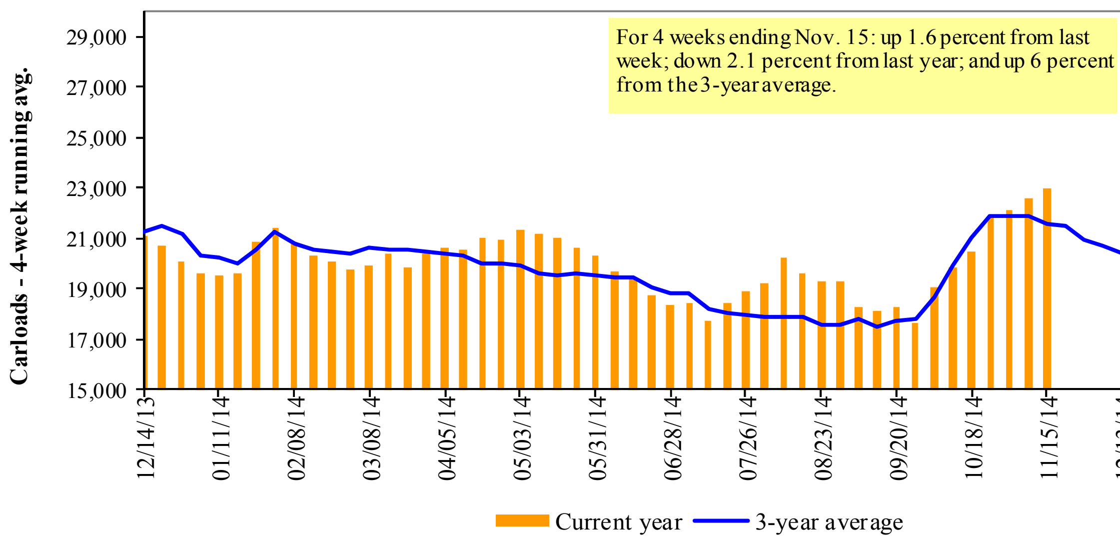
Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
11/15/14	2,321	3,874	10,856	1,069	5,193	23,313	5,698	5,477
This week last year	2,826	4,073	9,642	1,140	6,423	24,104	5,396	6,021
2014 YTD	86,728	131,039	408,465	41,302	256,874	924,408	208,543	241,107
2013 YTD	72,401	118,193	402,616	29,673	188,854	811,737	164,308	241,996
2014 YTD as % of 2013 YTD	120	111	101	139	136	114	127	100
Last 4 weeks as % of 2013	89	79	108	100	99	98	105	85
Last 4 weeks as % of 3-yr avg.[1]	107	94	100	142	119	106	121	84
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							
11/20/2014	Dec-14	Dec-13	Jan-15	Jan-14	Feb-15	Feb-14	Mar-15	Mar-14
BNSF[3]								
COT grain units	no offer	no offer	no offer	no offer	no offer	no offer	no offer	153
COT grain single-car[5]	no offer	no offer	no offer	no offer	no offer	no offer	no offer	0 . . 104
UP[4]								
GCAS/Region 1	no offer	1	no offer	no bids	no offer	no bids	n/a	n/a
GCAS/Region 2	no offer	1	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.

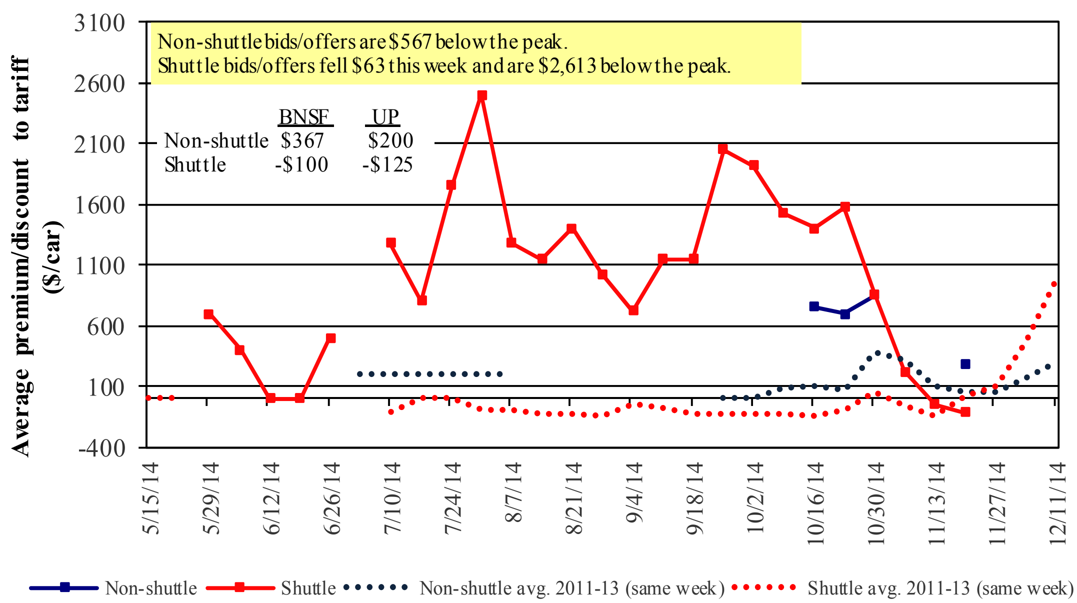
[5]Range is shown because average is not available. Not available = n/a.

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 December 2014, Secondary Market

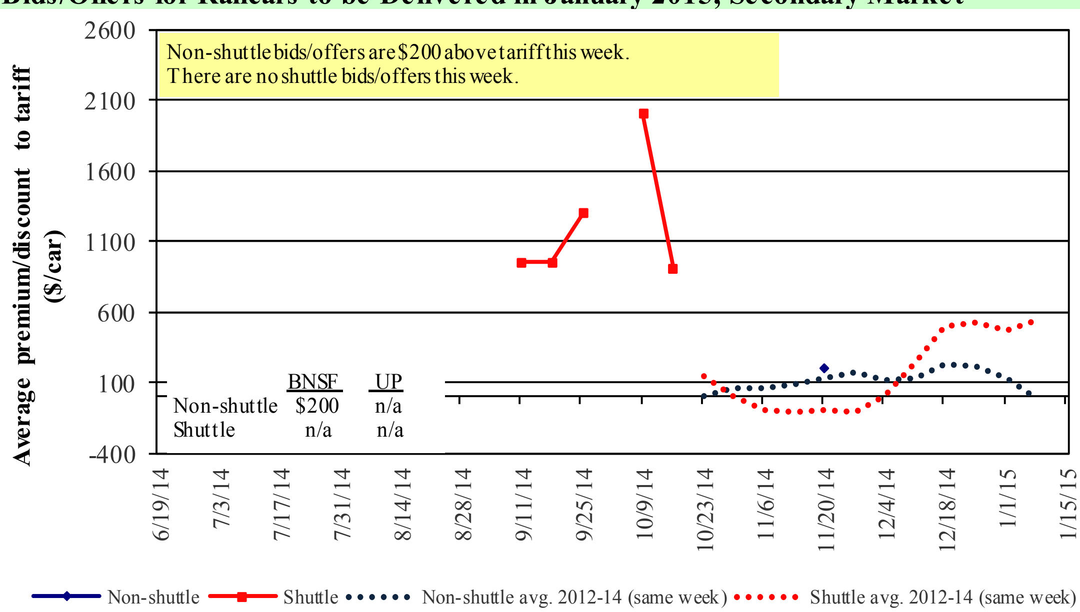


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in January 2015, Secondary Market

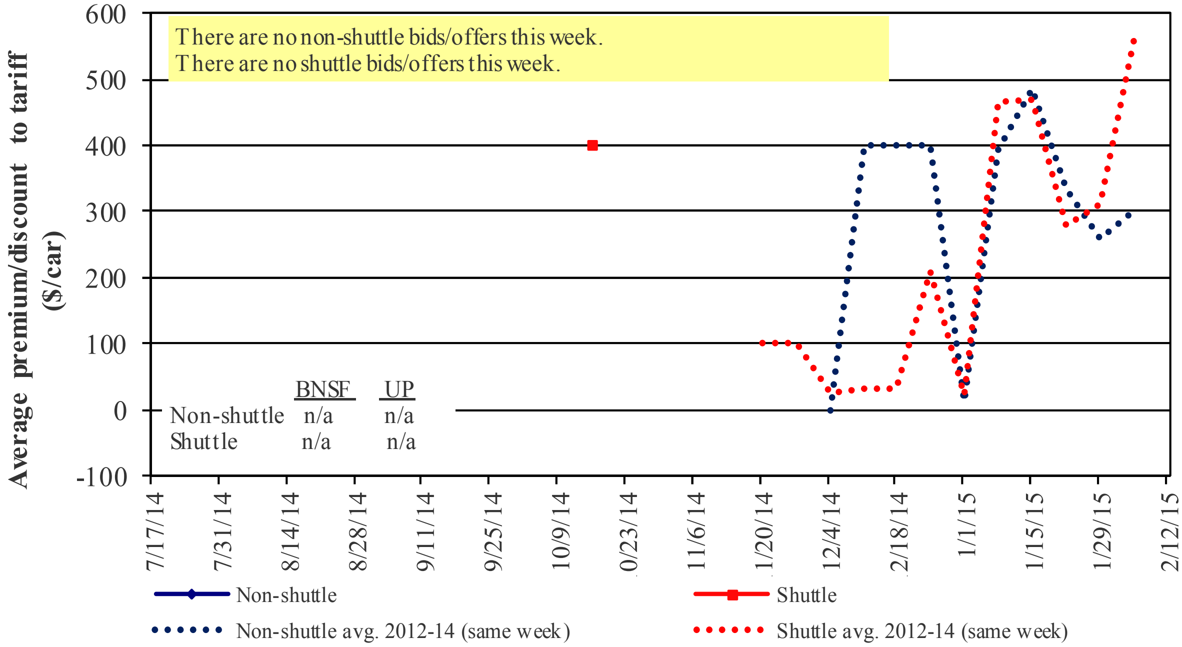


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in February 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**					
11/20/2014	**Dec-14**	**Jan-15**	**Feb-15**	**Mar-15**	**Apr-15**	**May-15**
Non-shuttle						
BNSF-GF	367	200	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	67	(50)	n/a	n/a	n/a	n/a
UP-Pool	200	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	150	n/a	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	(100)	n/a	n/a	n/a	n/a	n/a
Change from last week	100	n/a	n/a	n/a	n/a	n/a
Change from same week 2013	(1,083)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(125)	n/a	n/a	n/a	n/a	n/a
Change from last week	(225)	n/a	n/a	n/a	n/a	n/a
Change from same week 2013	(213)	n/a	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

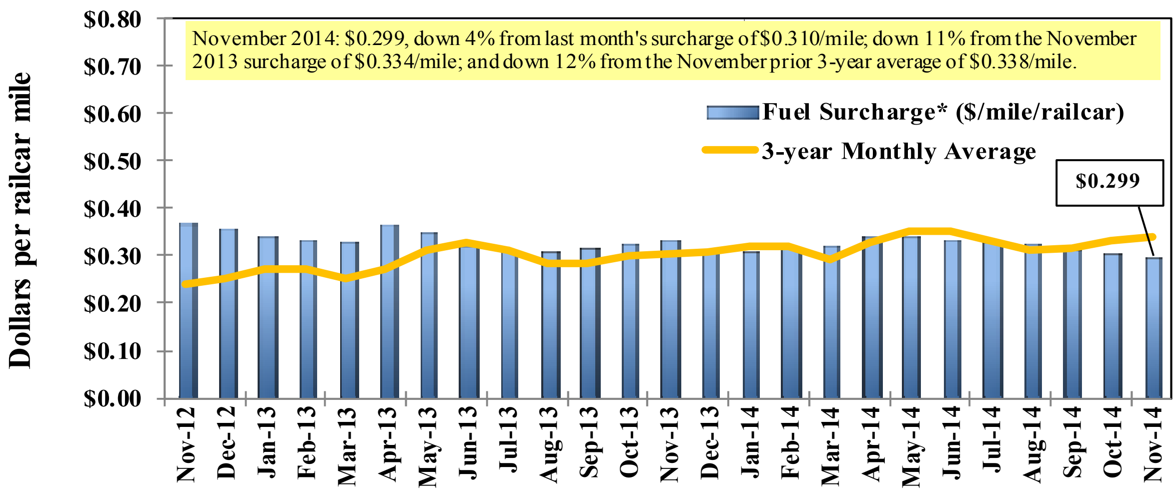
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[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.

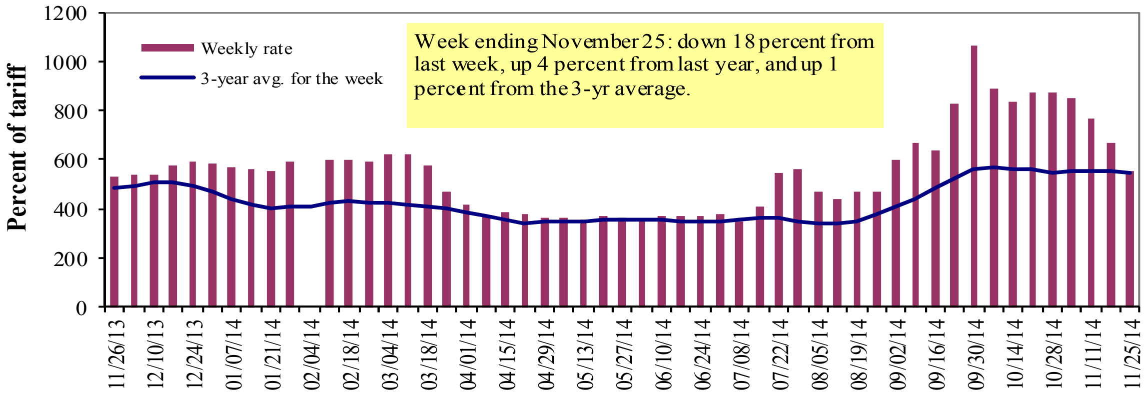
** BNSF strike price (diesel price when fuel surcharges begin) changed from $1.25/gal. to $2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was $0.227/mile instead of $0.331/mile.

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]



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
Rate[1]	11/25/2014	-	675	550	425	538	538	375
	11/18/2014	-	708	669	544	699	699	475
$/ton	11/25/2014	-	35.91	25.52	16.96	25.23	21.74	11.78
	11/18/2014	-	37.67	31.04	21.71	32.78	28.24	14.92
Current week % change from the same week:								
	Last year	-	24	4	-8	0	0	3
	3-year avg. [2]	-	19	1	-10	4	4	-3
Rate[1]	December	-	-	592	433	500	500	367
	February	-	-	533	405	450	450	333

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

Source: Transportation & Marketing Programs/AMS/USDA

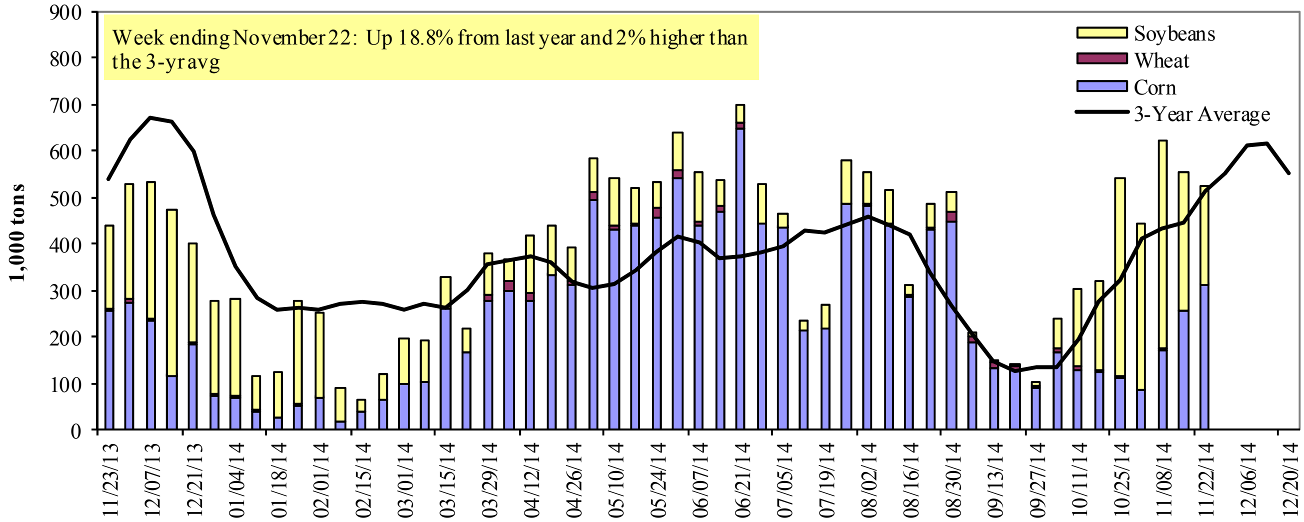
Figure 9
Benchmark tariff rates

Calculating barge rate per ton:
(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 11/22/2014	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	75	0	76	2	152
Winfield, MO (L25)	191	0	149	3	343
Alton, IL (L26)	344	0	205	2	550
Granite City, IL (L27)	311	2	211	2	525
Illinois River (L8)	81	0	13	0	94
Ohio River (L52)	113	0	287	0	400
Arkansas River (L1)	0	0	43	0	43
Weekly total - 2014	424	2	541	2	968
Weekly total - 2013	390	15	467	5	877
2014 YTD[1]	19,007	2,114	9,458	220	30,799
2013 YTD	8,000	4,001	7,938	219	20,159
2014 as % of 2013 YTD	238	53	119	100	153
Last 4 weeks as % of 2013[2]	87	28	138	61	116
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.

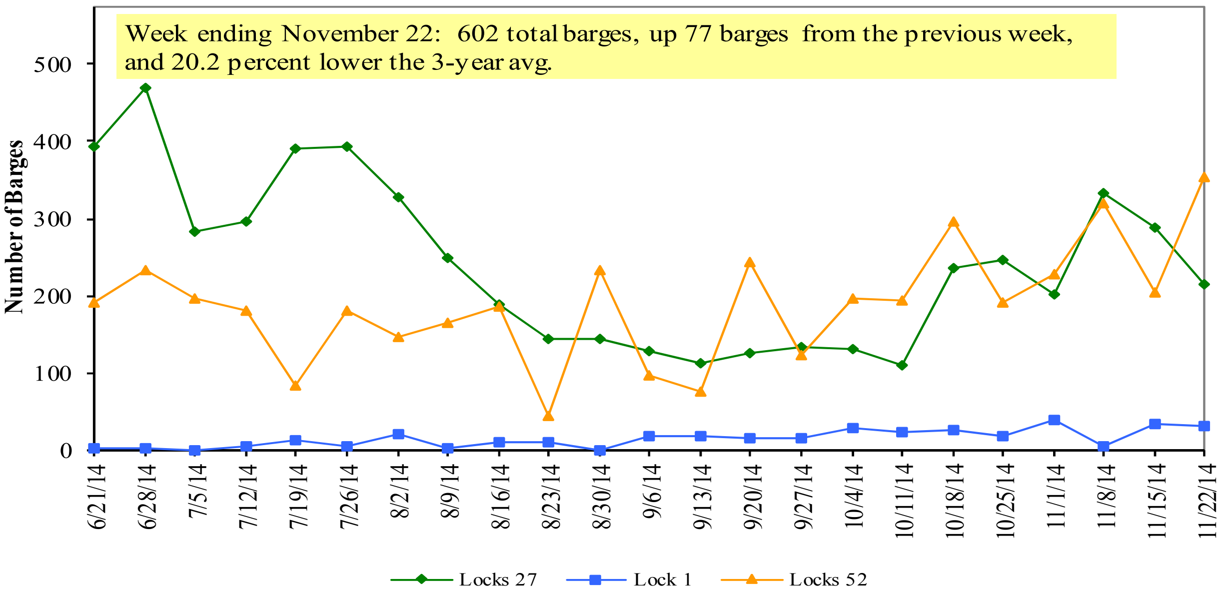
[2] As a percent of same period in 2013.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers

Figure 11

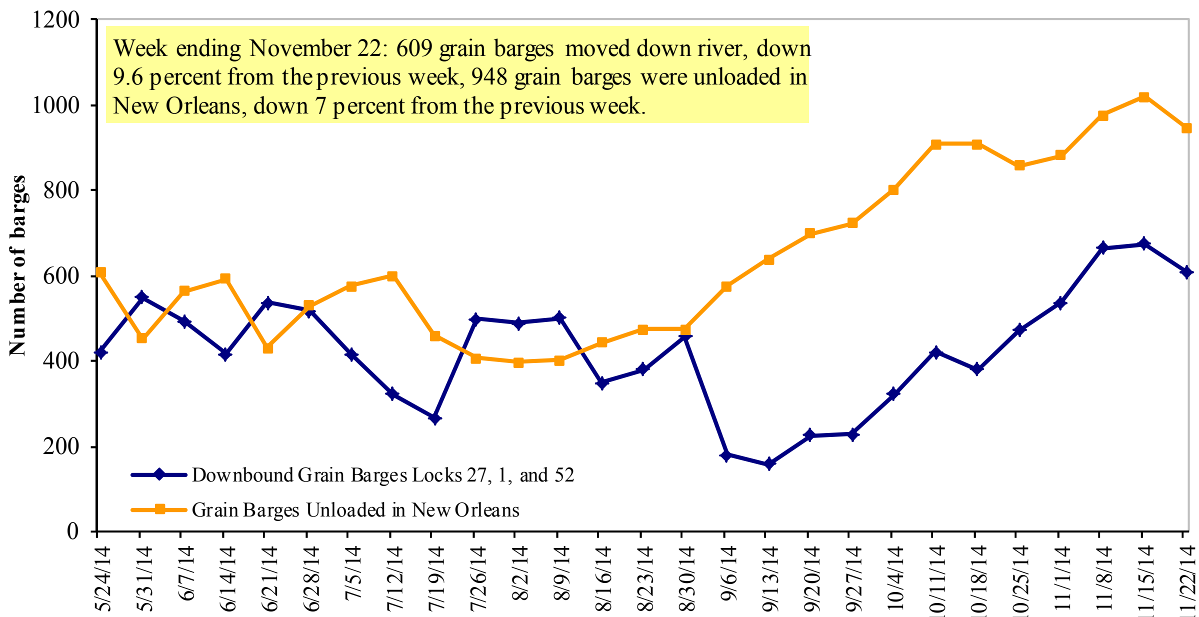
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 11/24/2014 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.520	-0.022	-0.350
	New England	3.605	-0.028	-0.398
	Central Atlantic	3.598	-0.014	-0.321
	Lower Atlantic	3.441	-0.028	-0.367
II	Midwest[2]	3.743	-0.043	-0.086
III	Gulf Coast[3]	3.511	-0.031	-0.242
IV	Rocky Mountain	3.740	-0.027	-0.097
V	West Coast	3.721	-0.041	-0.233
	West Coast less California	3.682	-0.038	-0.190
	California	3.753	-0.044	-0.270
Total	U.S.	3.628	-0.033	-0.216

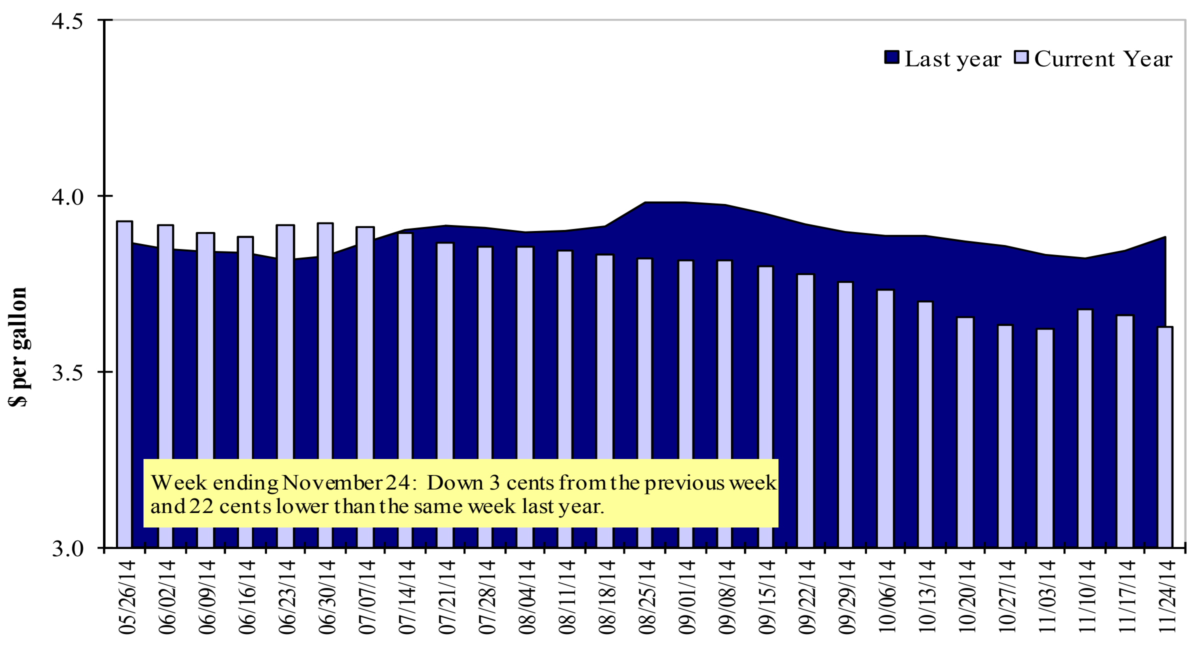
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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]									
11/13/2014	1,490	894	1,606	988	134	5,113	12,740	21,487	39,340
This week year ago	1,563	1,105	1,483	965	81	5,197	18,041	21,817	45,055
Cumulative exports-marketing year[2]									
2014/15 YTD	3,593	2,043	3,438	1,749	246	11,070	7,895	15,716	34,681
2013/14 YTD	6,632	5,070	2,717	2,005	195	16,618	5,884	13,490	35,992
YTD 2014/15 as % of 2013/14	54	40	127	87	126	67	134	117	96
Last 4 wks as % of same period 2013/14	96	83	101	91	122	94	69	112	92
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 11/13/2014	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	3,915	4,087	(4)	10,079
Mexico	5,332	6,661	(20)	8,145
Korea	554	469	18	2,965
Colombia	1,652	919	80	3,461
Taiwan	440	371	19	1,238
Top 5 Importers	**11,893**	**12,507**	**(5)**	**25,887**
Total US corn export sales	**20,635**	**23,926**	**(14)**	**34,445**
% of Projected	46%	49%		
Change from prior week	909	768		
Top 5 importers' share of U.S. corn export sales	58%	52%		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 11/13/2014	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	23,460	22,967	2	24,211
Mexico	1,653	1,355	22	2,971
Indonesia	796	842	(5)	1,895
Japan	842	828	2	1,750
Taiwan	876	804	9	1,055
Top 5 importers	**27,628**	**26,797**	**3**	**31,882**
Total US soybean export sales	**37,203**	**35,306**	**5**	**39,169**
% of Projected	79%	79%		
Change from prior week*	483	1,302		
Top 5 importers' share of U.S. soybean export sales	74%	76%		**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 11/13/2014	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	1,803	1,607	12	3,243
Mexico	1,735	2,054	(16)	3,066
Nigeria	1,676	1,713	(2)	2,960
Philippines	1,407	1,220	15	2,006
China	205	4,026	(95)	1,830
Brazil	1,492	3,225	(54)	1,617
Korea	968	916	6	1,552
Taiwan	612	609	1	969
Indonesia	349	545	(36)	813
Colombia	414	441	(6)	610
Top 10 importers	**10,661**	**16,354**	(35)	**18,665**
Total US wheat export sales	**16,182**	**21,814**	**(26)**	**27,696**
% of Projected	64%	68%		
Change from prior week*	361	618		
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 11/20/14	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	355	54	654	11,325	10,529	108	126	107	11,585
Corn	33	0	n/a	7,503	1,798	417	8	7	2,973
Soybeans	761	830	92	9,628	7,863	122	135	207	9,090
Total	**1,150**	**884**	**130**	**28,456**	**20,190**	**141**	**118**	**148**	**23,647**
Mississippi Gulf									
Wheat	24	0	n/a	4,248	9,286	46	24	27	9,711
Corn	394	312	127	28,136	12,659	222	95	108	14,828
Soybeans	1,607	1,966	82	22,837	16,646	137	130	154	21,462
Total	**2,026**	**2,278**	**89**	**55,221**	**38,591**	**143**	**116**	**136**	**46,002**
Texas Gulf									
Wheat	60	55	109	5,840	8,429	69	56	75	9,039
Corn	0	0	n/a	510	163	313	n/a	0	255
Soybeans	129	0	n/a	672	728	92	118	243	908
Total	**189**	**55**	**344**	**7,022**	**9,320**	**75**	**80**	**116**	**10,203**
Interior									
Wheat	21	23	94	1,270	967	131	127	92	1,244
Corn	83	88	94	5,095	3,264	156	80	55	3,943
Soybeans	133	192	69	3,565	2,866	124	68	189	3,212
Total	**237**	**303**	**78**	**9,930**	**7,097**	**140**	**228**	**104**	**8,399**
Great Lakes									
Wheat	10	0	n/a	726	745	97	185	168	884
Corn	7	0	n/a	282	0	n/a	n/a	493	0
Soybeans	62	90	69	584	463	126	147	203	699
Total	**79**	**90**	**88**	**1,592**	**1,208**	**132**	**160**	**196**	**1,583**
Atlantic									
Wheat	0	1	n/a	547	645	85	19	31	645
Corn	0	0	n/a	817	228	359	3	7	242
Soybeans	204	100	203	1,552	1,130	137	161	166	1,652
Total	**205**	**101**	**202**	**2,916**	**2,003**	**146**	**127**	**147**	**2,540**
U.S. total from ports[2]									
Wheat	471	133	355	23,956	30,601	78	80	82	33,108
Corn	518	400	129	42,343	18,112	234	68	73	22,241
Soybeans	2,897	3,179	91	38,838	29,695	131	134	172	37,024
Total	**3,886**	**3,712**	**105**	**105,138**	**78,408**	**134**	**114**	**136**	**92,373**

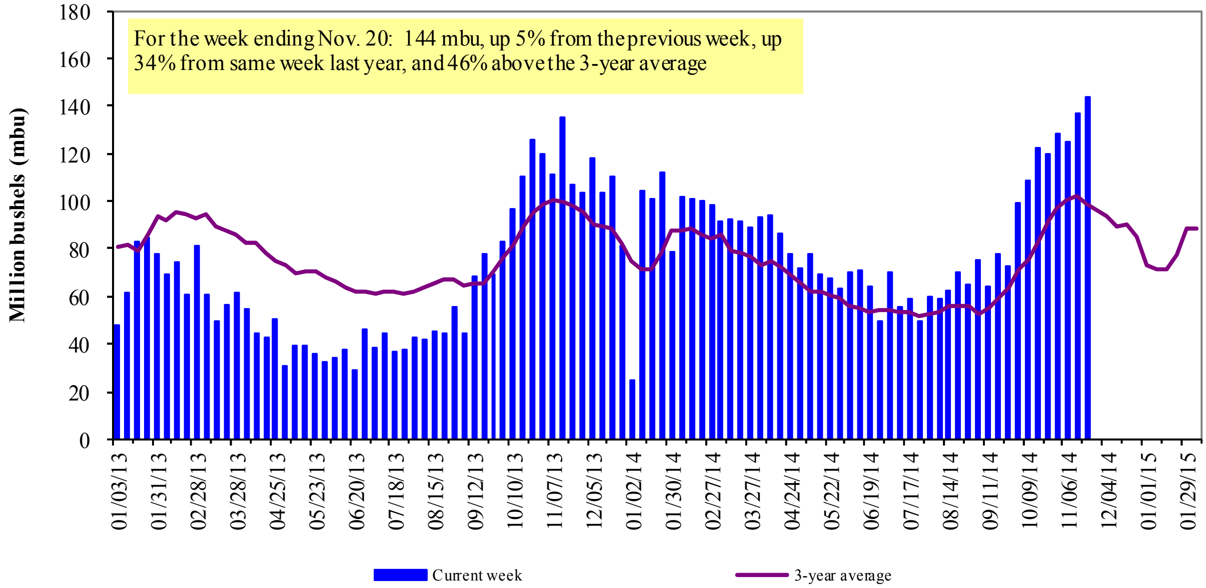
[1] Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

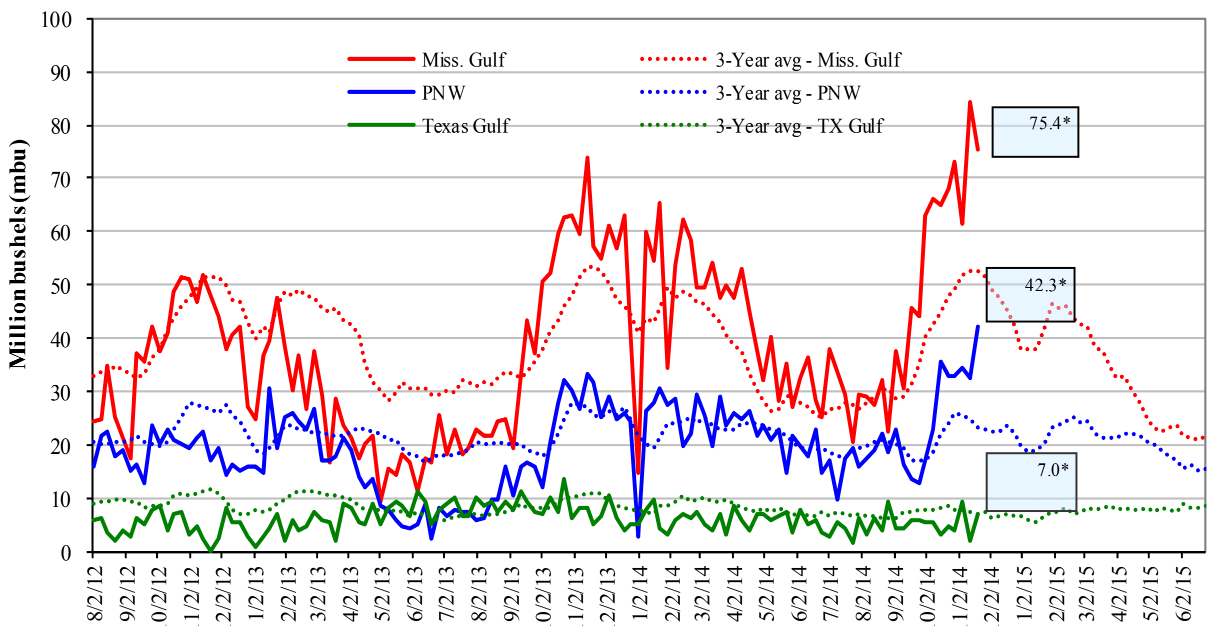


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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 20 : % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 11	up 244	down 5	up 30
Last year (same week)	up 32	up 36	up 32	up 33
3-yr avg. (4-wk mov. avg.)	up 39	up 44	up 39	up 87

Ocean Transportation

Table 17

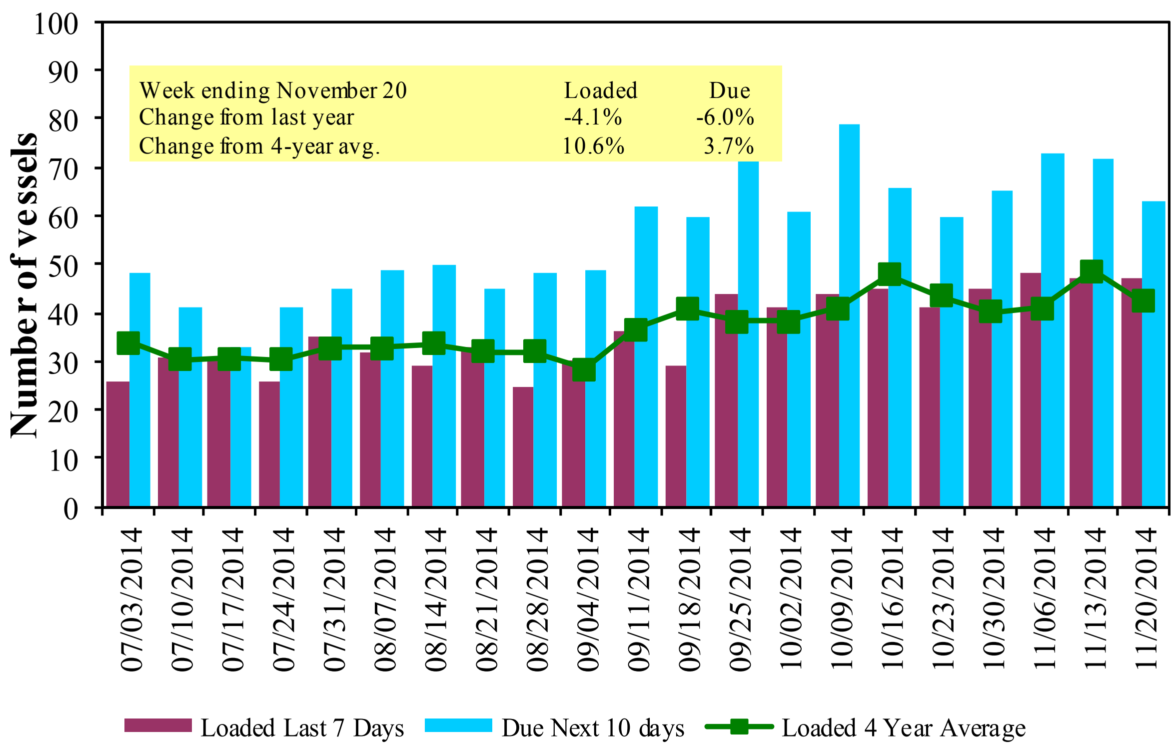
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf In port	Gulf Loaded 7-days	Gulf Due next 10-days	Pacific Northwest In port	Vancouver B.C. In port
11/20/2014	43	47	63	14	n/a
11/13/2014	49	47	72	18	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

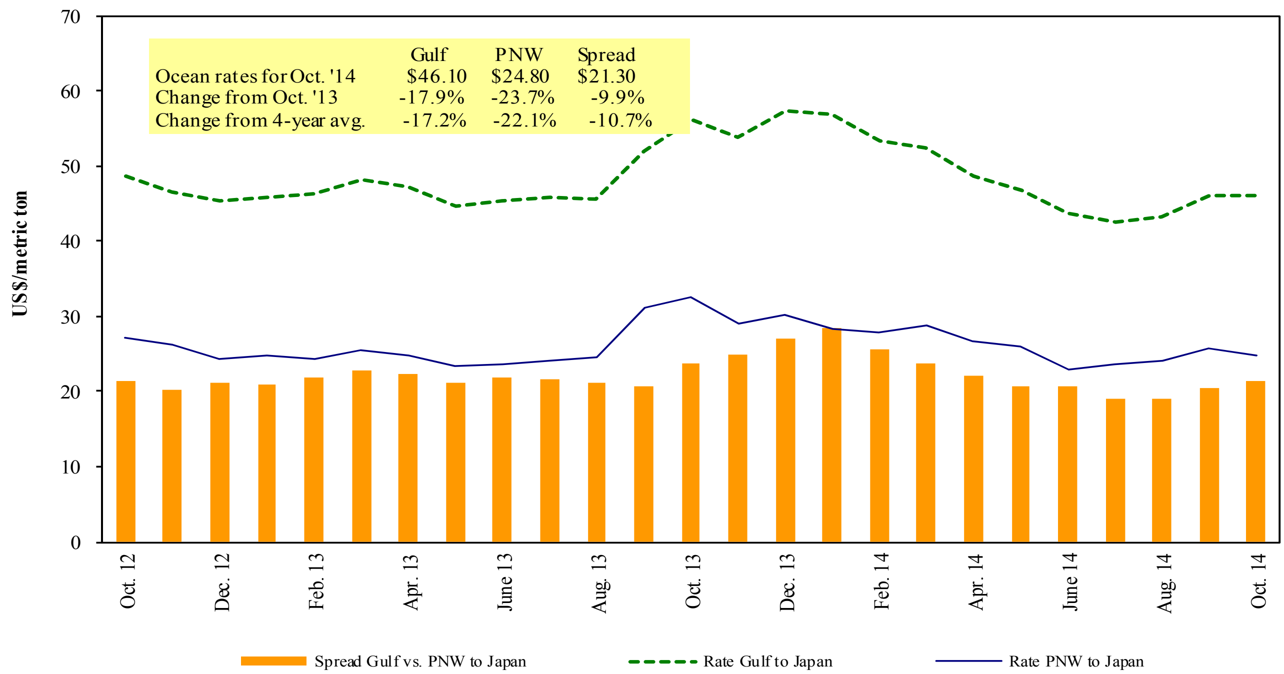


Source: Transportation & Marketing Programs/AMS/USDA

[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 11/22/2014

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Dec 10/20	60,000	41.25
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

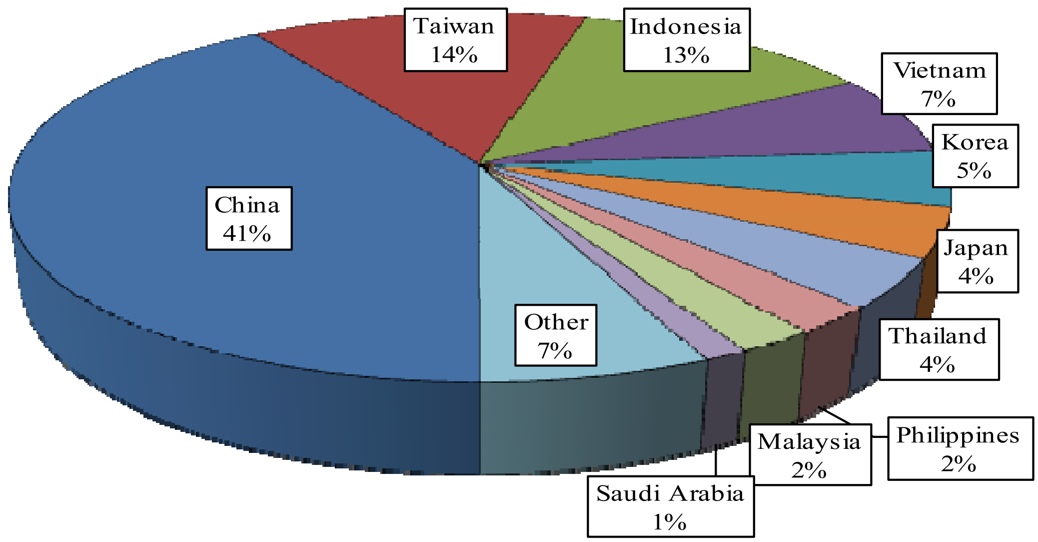
[1]50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

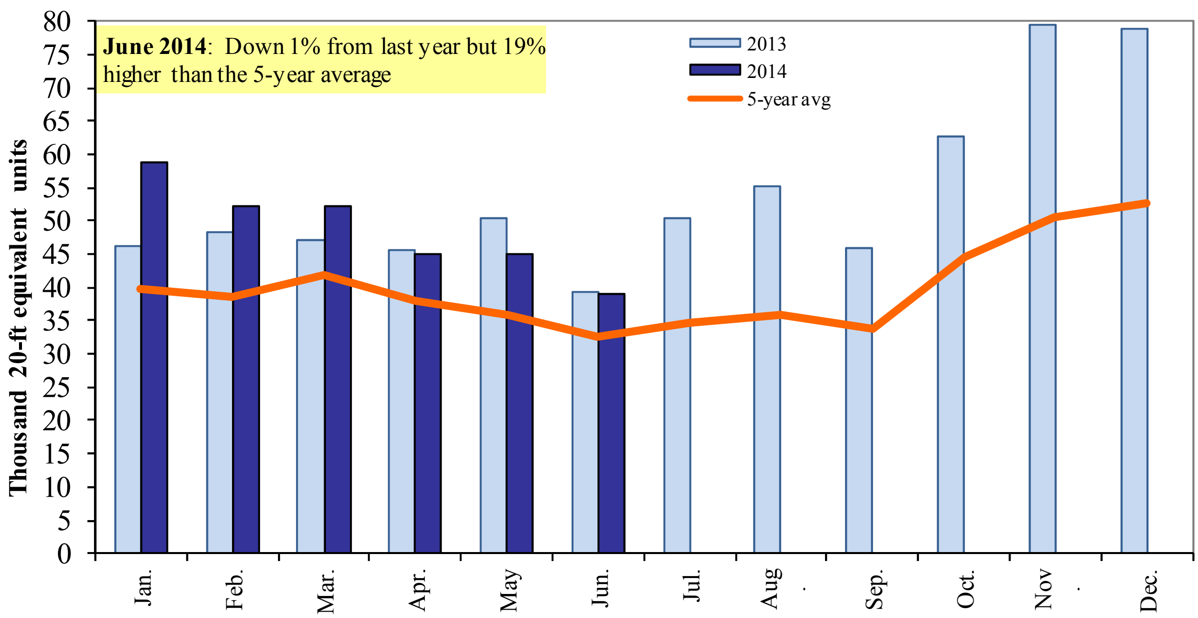


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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.

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