Grain Transportation Report

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

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Contents

The next release is November 22, 2012

WEEKLY HIGHLIGHTS

Underwater Obstacles Threaten Mississippi River Barge Traffic

The U.S. Coast Guard is warning mariners that extreme low water conditions exist on the Upper Mississippi River between Grand Tower and Thebes, IL. As river levels fall in the affected area—south of St. Louis and north of the mouth of the Ohio River—rock pinnacles and other protrusions in the low water area are becoming navigation hazards. Pinnacles are isolated rock columns that rise from the river bottom and become underwater obstacles for barge traffic. The U.S. Army Corps of Engineers (Corps) is soliciting contractors that will use explosives to remove the rock formations. In recent years, explosives have been used to remove similar rock formations. Barge interests would also like the Corps to release more water from upstream reservoirs on the Missouri River, which can augment the Mississippi River flows and raise water levels. A press conference is scheduled in St. Louis, MO, on November 16, by the Corps, the U.S. Coast Guard, and other river interests to address this situation.

Soybeans Boost Pacific Northwest Grain Inspections

For the week ending November 8, Pacific Northwest (PNW) grain inspections reached .582 million metric tons (mmt), up 12 percent from the previous week, but 4 percent below last year at this time. Soybean inspections in the PNW increased by 40 percent (.444 mmt) and were destined mainly to China. Soybean inspections also rebounded in the Texas Gulf (.061 mmt), up 364 percent from the past week and shipped primarily to China. Year-to-date export sales (shipped) of soybeans are up 49 percent from last year (Table 12). **Total inspections of grain** from all major export regions totaled 2.21 mmt, down 6 percent from the past week and 20 percent below last year at this time. Corn inspections dropped 39 percent from the previous week and wheat inspections decreased 25 percent for the same period.

Rail Originations of Grain the Lowest in More Than 15 Years

For the 4 weeks ending November 3, rail originations were at the lowest level in more than 15 years, at 81,214 carloads compared to 103,752 carloads in 2010. Rail originations were also 9 percent lower than the next lowest level, which were 89,051 carloads in 2011. According to the USDA November 9 World Agricultural Supply and Demand Estimates, corn exports for 2012/13 are expected to be down 25 percent and corn domestic use down 9 percent from the previous year. During 2010, corn accounted for 47.6 percent of all grain and oilseeds originated by railroads, wheat 27.8 percent, and soybeans 16.9 percent.

Snapshots by Sector

Rail

U.S. railroads originated 19,135 **carloads of grain** during the week ending November 3, down 1 percent from last week, 10 percent from last year, and 18 percent lower than the 3-year average.

During the week ending November 8, average November non-shuttle **secondary railcar bids/offers per car** were $5.50 below tariff, down $5.50 from last week, and $38.50 higher than last year. Average shuttle bids/offers were $244 below tariff, down $2.50 from last week, and $178 higher than last year.

Ocean

During the week ending November 8, 36 **ocean-going grain vessels** were loaded in the Gulf, unchanged from the same period last year. Fifty-five vessels are expected to be loaded within the next 10 days, 20 percent more than the same period last year.

During the week ending November 9, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $46.00 per mt, down 2 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was $26 per mt, down 2 percent from the previous week.

Containerized grain exports to Asia in August totaled more than 39,000 20-foot equivalent units—11 percent lower than the previous year, 29 percent higher than the 4-year average, and 8 percent lower than July movements.

Barge

During the week ending November 10, **barge grain movements** totaled 659,533 tons, 16 percent lower than the previous week and 4.5 percent lower than the same period last year.

During the week ending November 10, 417 grain barges **moved down river**, down 16 percent from last week; 831 grain barges were **unloaded in New Orleans**, down 2 percent from the previous week.

Fuel

During the week ending November 12, U.S. average **diesel fuel prices** fell 3 cents to $3.98 per gallon—1 cent lower than the same week last year.

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Web: http://dx.doi.org/10.9752/TS056.11-15-2012

Feature Article/Calendar

Rail-to-Port Cross-Border Mexico Data Source Changes

Starting this week, the source of the weekly Cross-Border Mexico data in the Grain Transportation Report's Table 3 **(Rail Deliveries to Port)** has changed from the voluntary reporting to USDA by participating railroads to the Association of American Railroads (AAR) Weekly Railroad Traffic Report. The AAR weekly report is a more accurate representation of cross-border rail movements on a weekly basis because it includes movements by all railroads. However, it also includes a small percentage of non-U.S. origin grain that should not be counted as U.S. grain delivered to Mexico. These non-U.S. origin movements are grain originating in Canada that crosses the U.S.-Mexico border and within-Mexico switching between Ferrocarril Mexicano, S.A. de C.V. (Ferromex) and Kansas City Southern de Mexico (KCSM). For instance, grain may originate in Western Mexico on Ferromex and be received by KCSM in Northeastern Mexico but never cross the U.S.-Mexico border. In addition, Ferromex may receive grain from KCSM that was received by KCSM at the U.S.-Mexico border, resulting in a double count.

The additional non-U.S. origin grain in the AAR data exceeded annual cross-border movements reported by the railroads to the USDA by 13 percent in 2010 and 2011 and 19 percent in 2009 (see Table). Consequently, for the purposes of consistent reporting, the Cross-Border Mexico deliveries appearing in the Grain Transportation Report will be adjusted from the AAR weekly data to remove non-U.S. origin grain. The adjustment is based on the average historical difference between the AAR weekly totals and the annual data reported to USDA by the railroads.

	Rail Grain Movements to Mexico				
	Metric Tons				
	2007	2008	2009	2010	2011
Corn	5,112,052	4,484,686	4,145,593	5,063,241	5,614,328
Sorghum	723,074	539,889	529,840	524,384	474,999
Wheat	1,047,907	1,063,986	616,551	1,045,323	1,251,861
Soybeans	2,021,928	2,161,948	1,794,334	1,997,522	1,953,783
Total	8,904,961	8,250,509	7,086,318	8,630,470	9,294,971
Carloads[1]	93,043	86,205	74,041	90,175	97,118
Carloads from AAR data	n/a	n/a	88,149	101,941	109,493
AAR as percent of carloads			119%	113%	113%

Sources: AAR Weekly Railroad Traffic
Salin, Delmy, U.S. Grain and Soybean Exports to Mexico, April 2011
BNSF Railway, Kansas City Southern Railway, and Union Pacific Railroad

[1] Carloads are assumed to carry 95.71 metric tons.

Rail Deliveries to Port (carloads)[1]

Week ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-Border Mexico[3]
11/07/2012[p]	694	761	3,896	1,023	6,374	11/03/12	1,420
10/31/2012[r]	539	920	4,311	1,218	6,988	10/27/12	1,761
2012 YTD[r]	14,283	35,862	173,138	17,856	241,139	2012 YTD	83,109
2011 YTD[r]	26,464	72,501	159,810	20,151	278,926	2011 YTD	83,440
2012 YTD as % of 2011 YTD	54	49	108	89	86	% change YTD	100
Last 4 weeks as % of 2011[2]	137	211	90	173	112	Last 4wks % 2011	80
Last 4 weeks as % of 4-year avg.	57	55	79	127	76	Last 4wks % 4 yr	77
Total 2011	27,358	77,515	191,187	24,088	320,148	Total 2011	97,118
Total 2010	33,971	83,492	177,896	32,780	328,139	Total 2010	90,175

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2011 and prior 4-year average.

[3] Cross- border weekly data is aproximately 15 percent below weekly AAR carloads received by Mexican railroads to reflect within Mexico switching between KCSM and FerroMex.

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

Source: Transportation & Marketing Programs/AMS/USDA

Since the other data in Table 3 reports on a Thursday through Wednesday week and the AAR data reports on a Sunday through Saturday week, the Cross-Border Mexico data will be shown on the right-hand side of the table and not included in the total. AAR Cross-Border Mexico data for the past four years has been adjusted and included in the **online dataset of Table 3** to reflect the new data source for this table. *Marvin.Prater@ams.usda.gov*

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
Week ending		Unit Train	Shuttle		Gulf	Pacific
11/14/12	267	233	199	296	206	184
11/07/12	269	234	199	331	210	188

[1]Indicator: 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	11/9/2012	11/2/2012
Corn	IL--Gulf	-0.75	-0.66
Corn	NE--Gulf	-0.49	-0.62
Soybean	IA--Gulf	-0.82	-1.24
HRW	KS--Gulf	-1.88	-1.52
HRS	ND--Portland	-1.82	-1.73

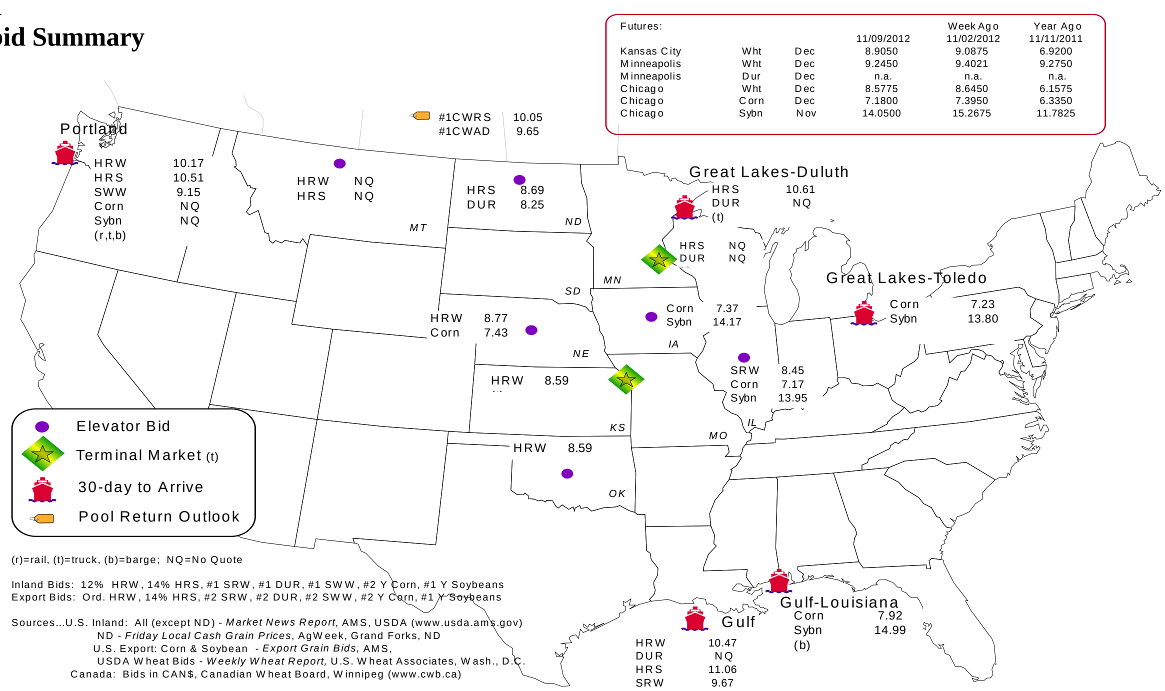
Note: nq = no quote

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]
11/07/2012[p]	694	761	3,896	1,023	6,374	11/03/12	1,420
10/31/2012[r]	539	920	4,311	1,218	6,988	10/27/12	1,761
2012 YTD[r]	14,283	35,862	173,138	17,856	241,139	2012 YTD	83,109
2011 YTD[r]	26,464	72,501	159,810	20,151	278,926	2011 YTD	83,440
2012 YTD as % of 2011 YTD	54	49	108	89	86	% change YTD	100
Last 4 weeks as % of 2011[2]	137	211	90	173	112	Last 4wks % 2011	80
Last 4 weeks as % of 4-year avg.[2]	57	55	79	127	76	Last 4wks % 4 yr	77
Total 2011	27,358	77,515	191,187	24,088	320,148	Total 2011	97,118
Total 2010	33,971	83,492	177,896	32,780	328,139	Total 2010	90,175

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2011 and prior 4-year average.

[3] Cross-Border weekly data is 85 percent of the AAR's weekly Carloads Received by Mexican Railroads in order to eliminate within Mexico switching and Canada-Mexico movements.

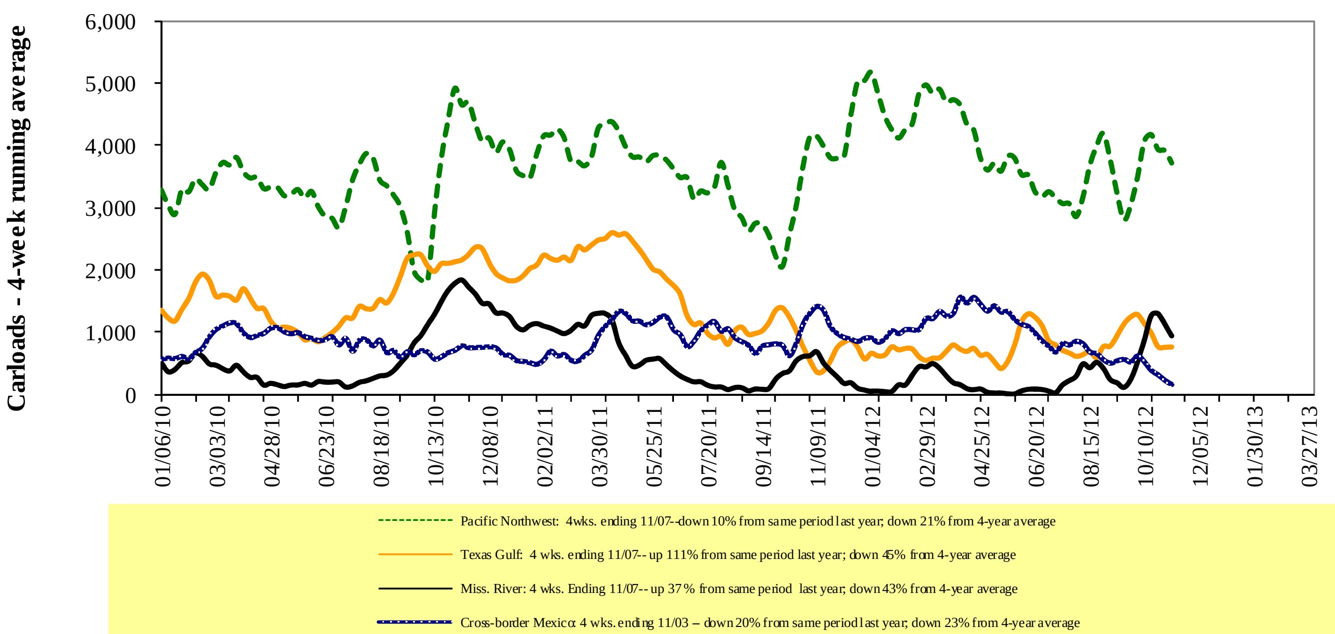
YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

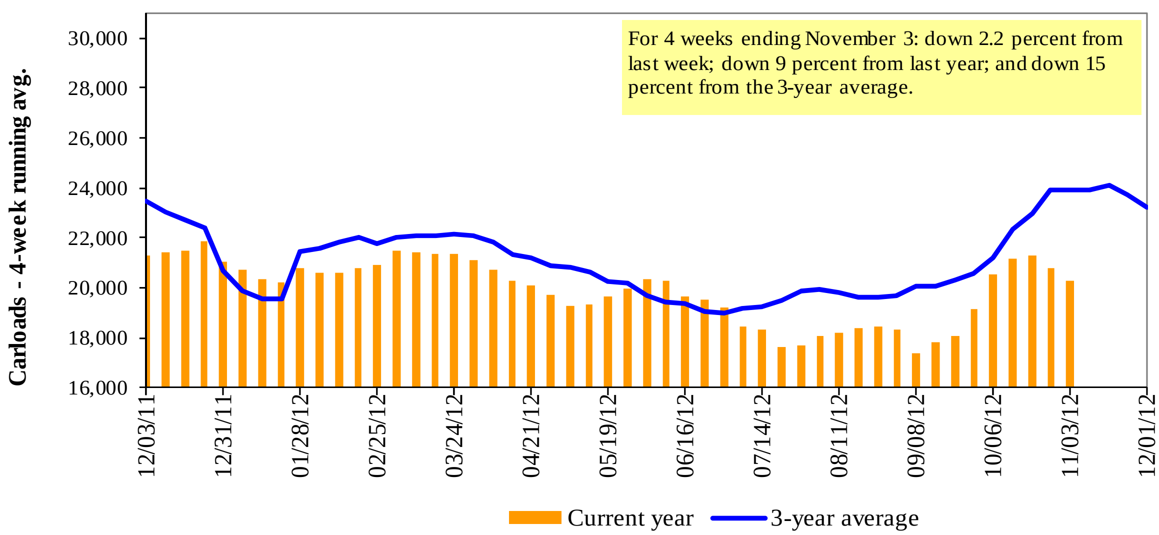
	East		West			U.S. total	Canada	
Week ending	**CSXT**	**NS**	**BNSF**	**KCS**	**UP**		**CN**	**CP**
11/03/12	1,897	3,036	10,462	611	3,129	19,135	4,496	6,039
This week last year	2,683	3,240	9,721	957	4,564	21,165	4,219	6,595
2012 YTD	72,496	122,657	437,283	22,731	213,795	868,962	171,582	217,879
2011 YTD	79,892	128,037	460,516	31,241	253,673	953,359	169,791	225,335
2012 YTD as % of 2011 YTD	91	96	95	73	84	91	101	97
Last 4 weeks as % of 2011[1]	76	91	109	65	70	91	99	103
Last 4 weeks as % of 3-yr avg.[1]	74	91	100	63	60	84	104	109
Total 2011	98,506	150,869	546,090	34,683	292,401	1,122,549	200,610	269,399

[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**							
11/8/2012	**Nov-12**	**Nov-11**	**Dec-12**	**Dec-11**	**Jan-13**	**Jan-12**	**Feb-13**	**Feb-12**
BNSF[3]								
COT grain units	no bids	no bids	0	no bids	no bids	no offer	no bids	no offer
COT grain single-car[5]	0 . . 1	0	0 . . 5	0	0 . . 1	no bids	1	no bids
UP[4]								
GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no offer	n/a	n/a
GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	no offer	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.

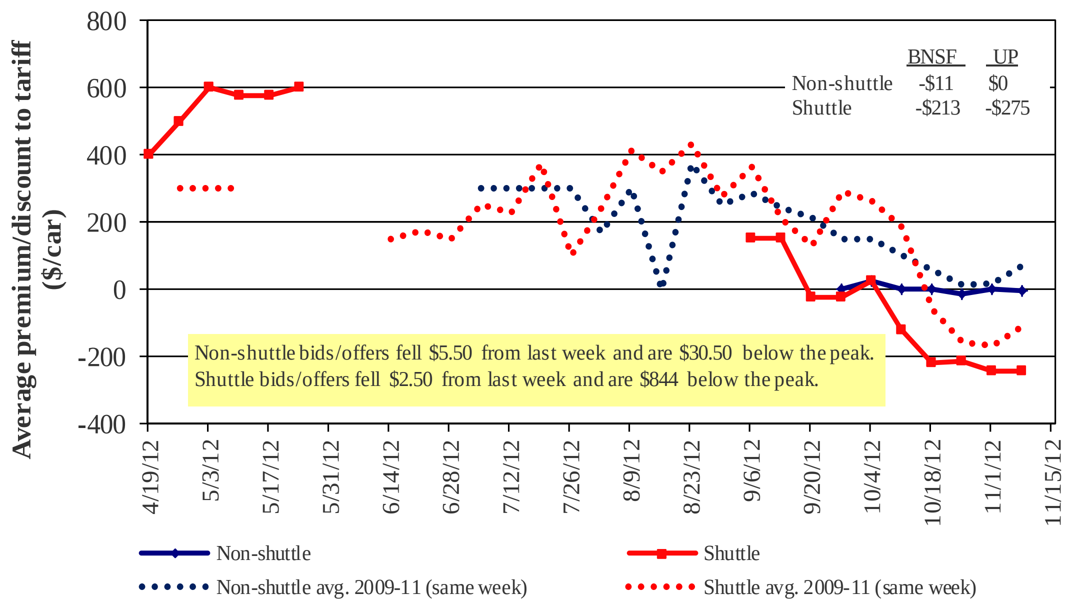
[5]Range is shown because average is not available. Not available = n/a.

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 2012, Secondary Market

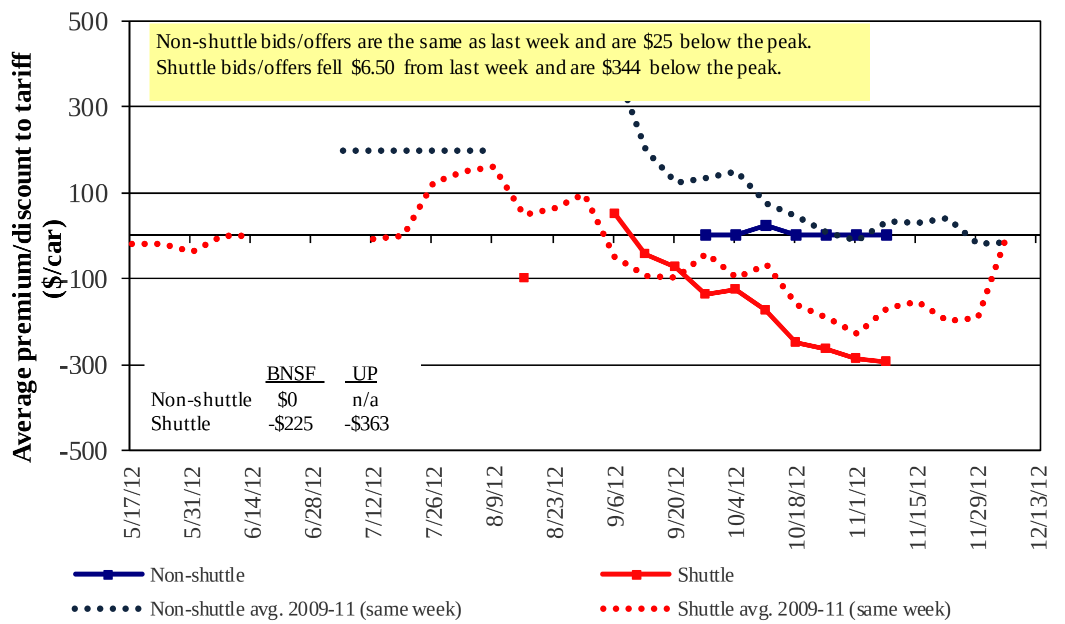


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in December 2012, Secondary Market

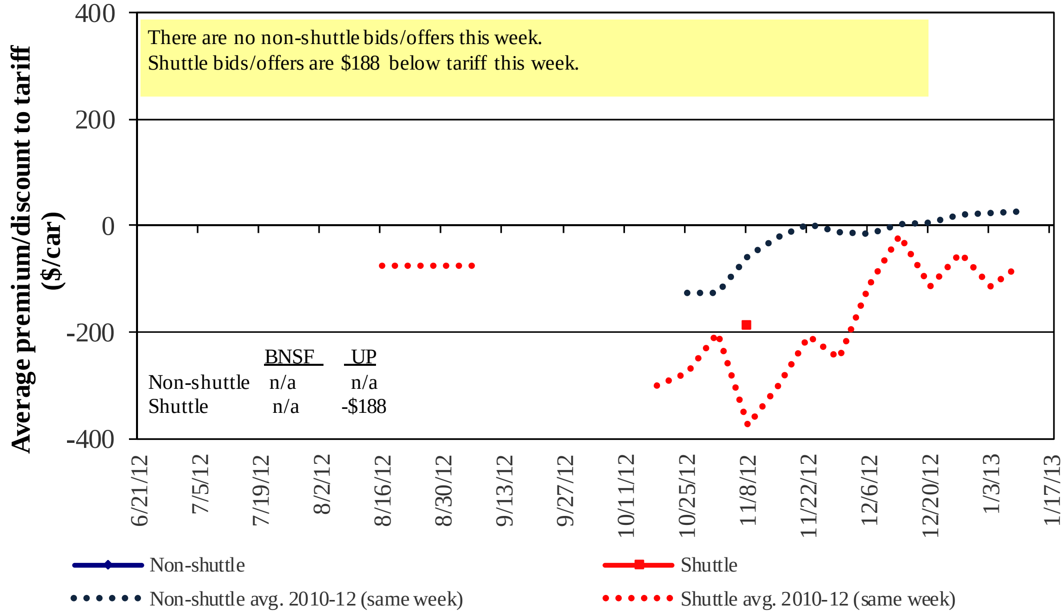


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in January 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					
11/8/2012	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13
Non-shuttle						
BNSF-GF	(11)	-	n/a	n/a	n/a	n/a
Change from last week	(11)	-	n/a	n/a	n/a	n/a
Change from same week 2011	52	8	n/a	n/a	n/a	n/a
UP-Pool	-	n/a	n/a	n/a	n/a	n/a
Change from last week	-	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	25	n/a	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	(213)	(225)	n/a	n/a	n/a	n/a
Change from last week	(55)	50	n/a	n/a	n/a	n/a
Change from same week 2011	231	n/a	n/a	n/a	n/a	n/a
UP-Pool	(275)	(363)	(188)	n/a	n/a	n/a
Change from last week	50	(63)	n/a	n/a	n/a	n/a
Change from same week 2011	125	87	212	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 Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7

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

Effective date: 11/1/2012	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	$3,144	$207	$33.28	$0.91	6
	Grand Forks, ND	Duluth-Superior, MN	$3,445	$122	$35.42	$0.96	12
	Wichita, KS	Los Angeles, CA	$6,026	$627	$66.07	$1.80	7
	Wichita, KS	New Orleans, LA	$3,645	$365	$39.82	$1.08	5
	Sioux Falls, SD	Galveston-Houston, TX	$5,573	$515	$60.46	$1.65	4
	Northwest KS	Galveston-Houston, TX	$3,912	$400	$42.82	$1.17	5
	Amarillo, TX	Los Angeles, CA	$4,112	$556	$46.36	$1.26	5
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,110	$412	$34.98	$0.95	3
	Toledo, OH	Raleigh, NC	$4,508	$468	$49.41	$1.34	15
	Des Moines, IA	Davenport, IA	$2,006	$87	$20.79	$0.57	4
	Indianapolis, IN	Atlanta, GA	$3,920	$351	$42.41	$1.15	16
	Indianapolis, IN	Knoxville, TN	$3,354	$225	$35.54	$0.97	18
	Des Moines, IA	Little Rock, AR	$3,154	$257	$33.87	$0.92	4
	Des Moines, IA	Los Angeles, CA	$5,065	$747	$57.72	$1.57	3
Soybeans	Minneapolis, MN	New Orleans, LA	$3,369	$454	$37.97	$1.03	2
	Toledo, OH	Huntsville, AL	$3,575	$332	$38.80	$1.06	3
	Indianapolis, IN	Raleigh, NC	$4,578	$471	$50.14	$1.36	4
	Indianapolis, IN	Huntsville, AL	$3,267	$225	$34.68	$0.94	3
	Champaign-Urbana, IL	New Orleans, LA	$3,599	$412	$39.84	$1.08	7
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,481	$361	$38.15	$1.04	9
	Wichita, KS	Galveston-Houston, TX	$3,634	$281	$38.88	$1.06	16
	Chicago, IL	Albany, NY	$3,771	$438	$41.80	$1.14	5
	Grand Forks, ND	Portland, OR	$4,963	$623	$55.47	$1.51	7
	Grand Forks, ND	Galveston-Houston, TX	$5,984	$649	$65.87	$1.79	6
	Northwest KS	Portland, OR	$4,793	$656	$54.11	$1.47	3
Corn	Minneapolis, MN	Portland, OR	$4,800	$759	$55.20	$1.50	2
	Sioux Falls, SD	Tacoma, WA	$4,760	$695	$54.17	$1.47	2
	Champaign-Urbana, IL	New Orleans, LA	$2,857	$412	$32.47	$0.88	1
	Lincoln, NE	Galveston-Houston, TX	$3,310	$405	$36.89	$1.00	2
	Des Moines, IA	Amarillo, TX	$3,430	$323	$37.27	$1.01	1
	Minneapolis, MN	Tacoma, WA	$4,800	$753	$55.14	$1.50	2
	Council Bluffs, IA	Stockton, CA	$4,200	$779	$49.44	$1.35	3
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,340	$695	$59.93	$1.63	7
	Minneapolis, MN	Portland, OR	$5,330	$759	$60.47	$1.65	8
	Fargo, ND	Tacoma, WA	$5,230	$618	$58.07	$1.58	7
	Council Bluffs, IA	New Orleans, LA	$3,870	$476	$43.15	$1.17	6
	Toledo, OH	Huntsville, AL	$2,750	$332	$30.61	$0.83	4
	Grand Island, NE	Portland, OR	$4,960	$671	$55.92	$1.52	11

[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: 11/1/2012				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	$7,741	$659	$85.83	$2.33	1
	OK	Cuautitlan, EM	$6,837	$801	$78.03	$2.12	4
	KS	Guadalajara, JA	$7,444	$774	$83.97	$2.28	-1
	TX	Salinas Victoria, NL	$3,743	$302	$41.33	$1.12	3
Corn	IA	Guadalajara, JA	$7,699	$910	$87.96	$2.23	1
	SD	Celaya, GJ[5]	$7,356	$863	$83.98	$2.13	n/a
	NE	Queretaro, QA	$7,153	$808	$81.35	$2.06	2
	SD	Salinas Victoria, NL	$5,700	$656	$64.94	$1.65	3
	MO	Tlalnepantla, EM	$6,592	$785	$75.37	$1.91	7
	SD	Torreon, CU	$6,522	$722	$74.02	$1.88	2
Soybeans	MO	Bojay (Tula), HG	$7,580	$768	$85.29	$2.32	8
	NE	Guadalajara, JA	$8,134	$878	$92.08	$2.50	3
	IA	El Castillo, JA	$8,555	$857	$96.17	$2.61	5
	KS	Torreon, CU	$6,651	$544	$73.52	$2.00	3
Sorghum	OK	Cuautitlan, EM	$5,730	$655	$65.24	$1.66	3
	TX	Guadalajara, JA	$6,653	$561	$73.71	$1.87	1
	NE	Celaya, GJ[5]	$6,937	$783	$78.88	$2.00	n/a
	KS	Queretaro, QA	$6,460	$492	$71.03	$1.80	1
	NE	Salinas Victoria, NL	$5,178	$576	$58.79	$1.49	3
	NE	Torreon, CU	$6,068	$643	$68.57	$1.74	0

[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

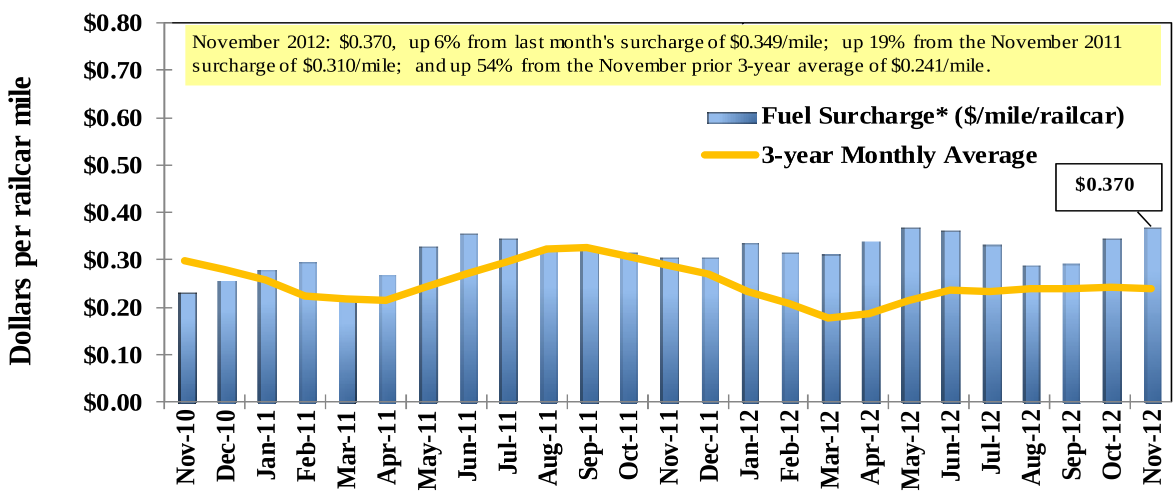
[4]Percentage change year over year calculated using tariff rate plus fuel surchage

[5] Beginning 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 Average[1]



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

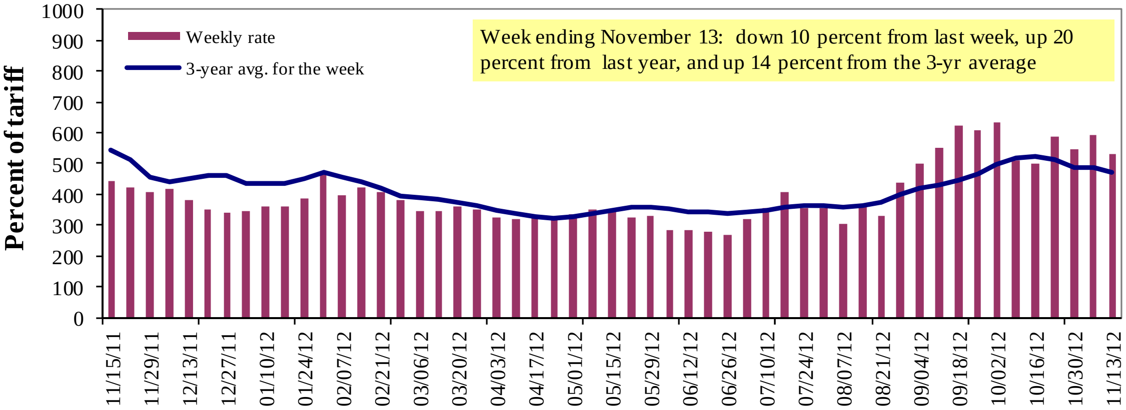
* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

** 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]	11/13/2012	550	558	533	500	417	417	383
	11/6/2012	588	625	595	625	500	500	425
$/ton	11/13/2012	34.05	29.69	24.73	19.95	19.56	16.85	12.03
	11/6/2012	36.40	33.25	27.61	24.94	23.45	20.20	13.35
Current week % change from the same week:								
	Last year	15	27	20	44	-9	-9	28
	3-year avg. [2]	4	16	14	21	-12	-12	3
Rate[1]	December	-	-	477	447	368	368	325
	February	-	-	450	375	340	340	303

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

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

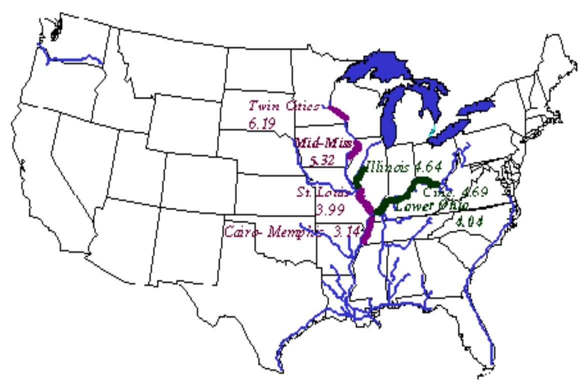
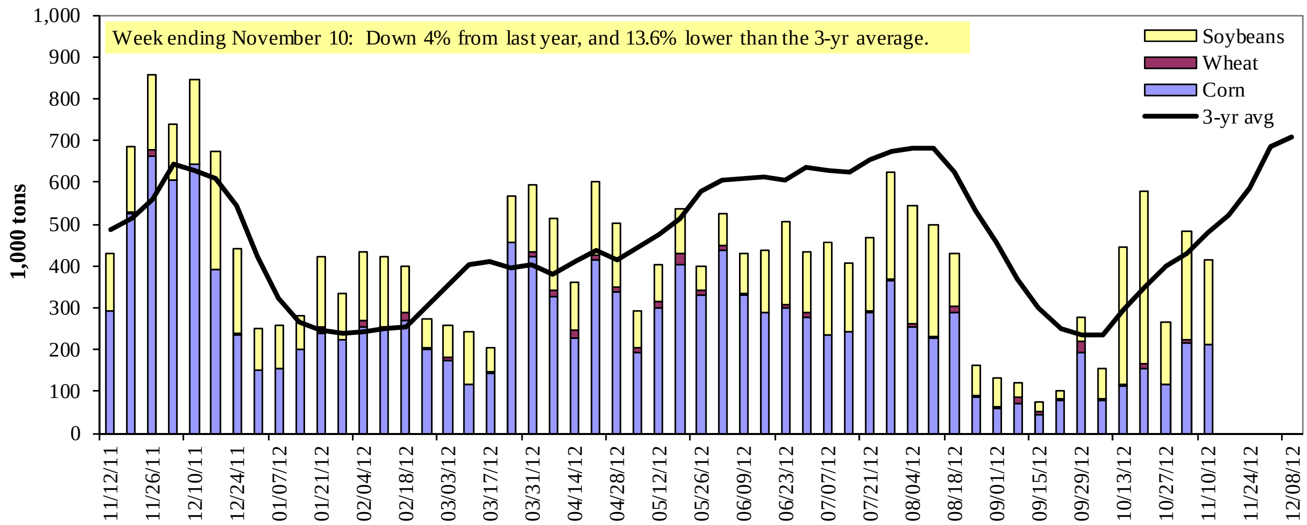


Figure 10

Barge Movements on the Mississippi 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 11/10/2012	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	80	6	85	0	171
Winfield, MO (L25)	194	6	191	5	396
Alton, IL (L26)	221	6	223	5	455
Granite City, IL (L27)	212	0	202	5	419
Illinois River (L8)	11	0	9	0	20
Ohio River (L52)	22	0	169	4	194
Arkansas River (L1)	0	10	37	0	47
Weekly total - 2012	234	10	407	8	660
Weekly total - 2011	352	26	307	6	691
2012 YTD[1]	13,352	1,670	9,864	224	25,110
2011 YTD	16,181	1,313	6,568	353	24,415
2012 as % of 2011 YTD	83	127	150	63	103
Last 4 weeks as % of 2011[2]	60	61	141	40	99
Total 2011	19,921	1,460	8,553	422	30,356

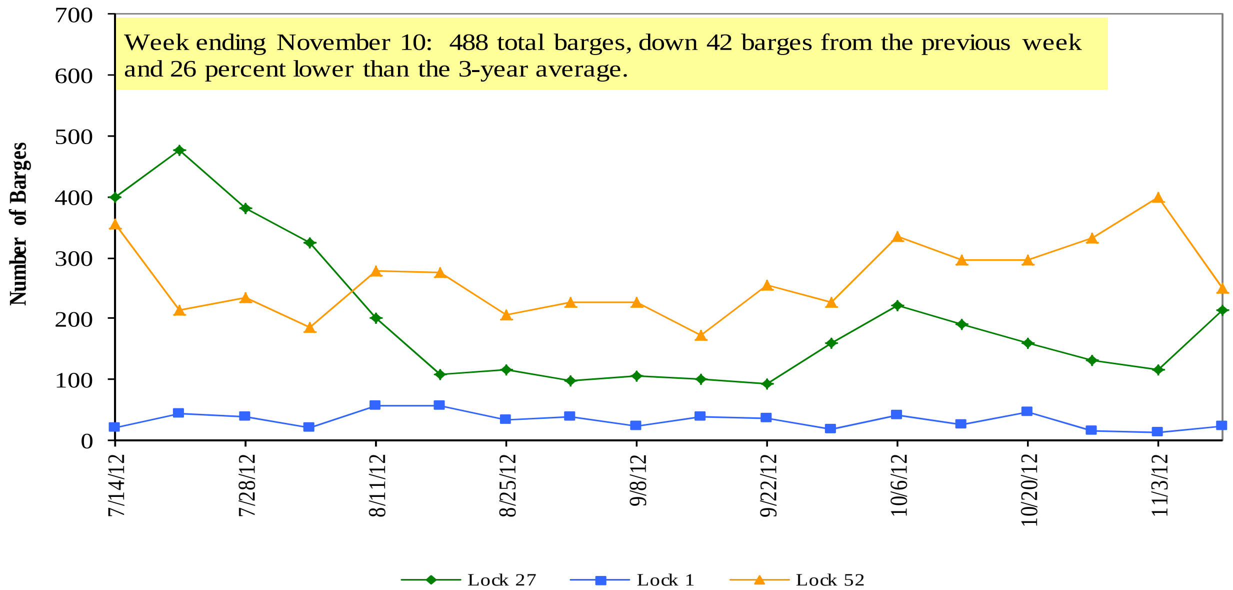
[1] Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

[2] As a percent of same period in 2011.

Note: Total may not add exactly, due to rounding
Source: U.S. Army Corps of Engineers

Figure 11

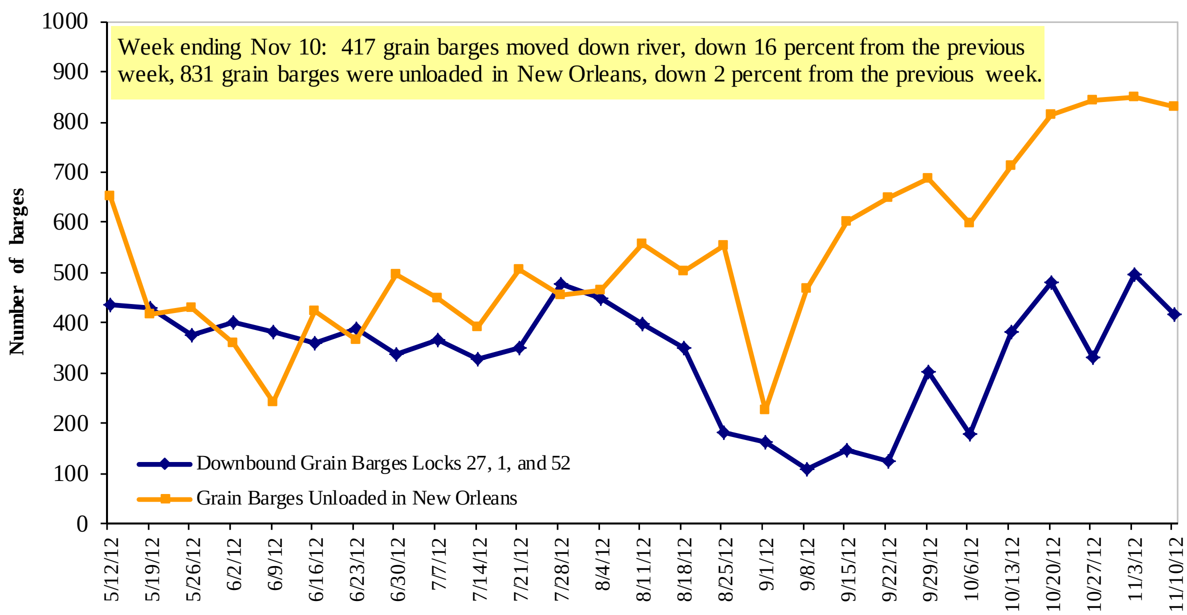
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 11/12/2012 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	4.037	0.003	0.073
	New England	4.198	-0.013	0.168
	Central Atlantic	4.165	0.010	0.080
	Lower Atlantic	3.912	0.002	0.006
II	Midwest[2]	3.908	-0.051	-0.079
III	Gulf Coast[3]	3.875	-0.045	-0.007
IV	Rocky Mountain	4.104	-0.056	0.011
V	West Coast	4.131	-0.022	-0.040
	West Coast less California	4.098	0.030	-
	California	4.160	-0.065	-0.110
Total	U.S.	3.980	-0.030	-0.007

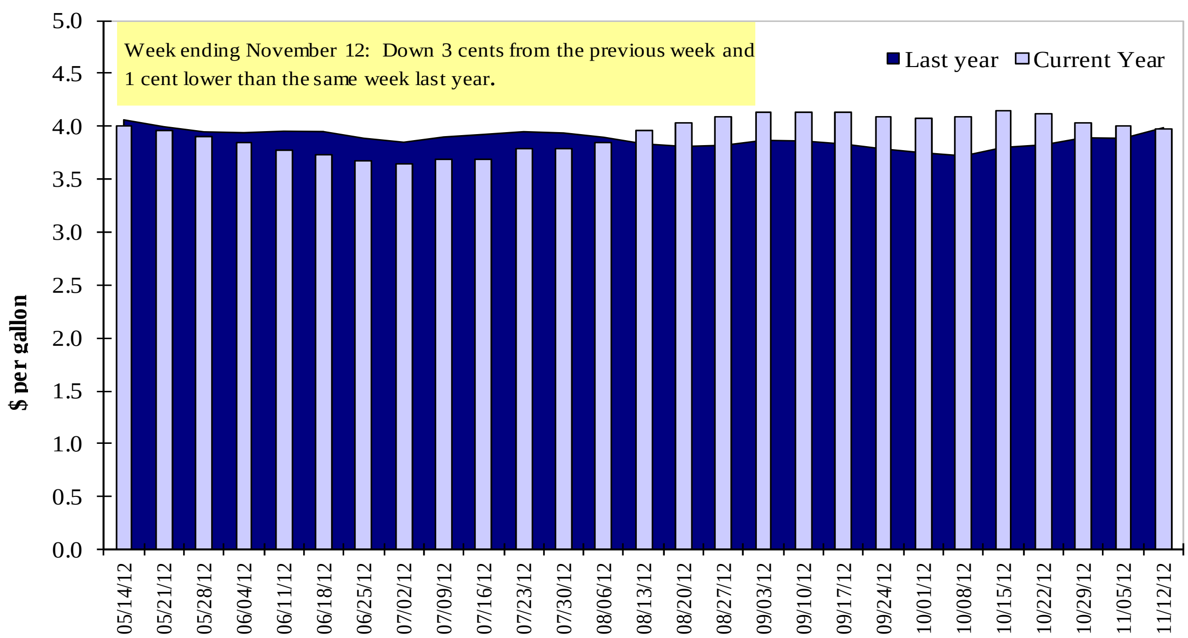
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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)

Week ending	Wheat HRW	SRW	HRS	SWW	DUR	All wheat	Corn	Soybeans	Total
Export Balances[1]									
11/1/2012	1,424	638	1,220	759	72	4,113	6,957	16,137	27,207
This week year ago	1,333	690	1,174	899	56	4,151	14,991	12,561	31,703
Cumulative exports-marketing year[2]									
2012/13 YTD	4,361	1,480	2,677	2,014	269	10,802	4,113	9,805	24,720
2011/12 YTD	5,064	1,647	3,156	2,198	271	12,335	6,350	6,565	25,250
YTD 2012/13 as % of 2011/12	86	90	85	92	99	88	65	149	98
Last 4 wks as % of same period 2011/12	109	90	102	89	153	100	49	144	93
2011/12 Total	9,904	4,319	6,312	5,601	491	26,627	37,900	36,727	101,254
2010/11 Total	15,837	2,828	8,623	4,717	979	32,984	44,569	39,753	117,306

[1] Current unshipped export sales to date

[2] Shipped export sales to date; new marketing year begins for corn and soybeans

Note: YTD = year-to-date. Marketing Year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Table 13

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

Week ending 11/01/12	**Total Commitments[2] 2012/13 Current MY**	**2011/12 Last MY**	**% change current MY from last MY**	**Exports[3] 2011/12**
	- 1,000 mt -			- 1,000 mt -
Japan	3,147	4,906	(36)	12,367
Mexico	2,745	3,982	(31)	9,617
China	972	2,163	(55)	5,414
Korea	416	1,822	(77)	3,639
Venezuela	194	155	25	1,332
Top 5 importers	**7,475**	**13,028**	**(43)**	**32,369**
Total US corn export sales	**11,068**	**21,341**	**(48)**	**39,180**
% of Projected	38%	54%		
Change from prior week	**158**	**252**		
Top 5 importers' share of U.S. corn export sales	68%	61%		83%
USDA forecast, November 2012	**29,210**	**39,180**	**(25)**	
Corn Use for Ethanol USDA forecast, Ethanol November 2012	**114,300**	**127,000**	**(10)**	

(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 Importers[1] of U.S. Soybeans

Week Ending 11/01/2012	Total Commitments[2] 2012/13 Current MY	2011/12 Last MY	% change current MY from last MY	Exports[3] 2011/12
	- 1,000 mt -			- 1,000 mt -
China	15,998	13,303	20	24,602
Mexico	983	1,203	(18)	3,180
Japan	710	766	(7)	1,891
Indonesia	460	464	(1)	1,741
Egypt	304	258	18	1,292
Top 5 importers	**18,456**	**15,994**	**15**	**32,706**
Total US soybean export sales	**25,942**	**19,126**	**36**	**37,060**
% of Projected	71%	52%		
Change from prior week	186	604		
Top 5 importers' share of U.S. soybean export sales	71%	84%		
USDA forecast, November 2012	**36,610**	**37,060**	**(1)**	

(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 11/01/2012	Total Commitments[2] 2012/13 Current MY	2011/12 Last MY	% change current MY from last MY	Exports[3] 2011/12
	- 1,000 mt -			- 1,000 mt -
Japan	1,963	2,154	(9)	3,512
Mexico	2,023	2,163	(6)	3,496
Nigeria	1,770	1,883	(6)	3,248
Philippines	1,286	1,493	(14)	2,039
Korea	1,052	762	38	1,983
Egypt	150	247	(39)	950
Taiwan	657	499	32	888
Indonesia	369	473	(22)	830
Venezuela	478	353	35	594
Iraq	209	572	(63)	572
Top 10 importers	**9,956**	**10,598**	**(6)**	**18,111**
Total US wheat export sales	**14,915**	**16,486**	**(10)**	**28,560**
% of Projected	50%	58%		
Change from prior week	210	298		
Top 10 importers' share of U.S. wheat export sales	67%	64%		63%
USDA forecast, November 2012	**29,940**	**28,560**	**5**	

(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 11/08/12	Previous Week[1]	Current Week as % of Previous	2012 YTD[1]	2011 YTD[1]	2012 YTD as % of 2011 YTD	Last 4-weeks as % of 2011	Last 4-weeks as % of 3-yr. avg.	Total[1] 2011
Pacific Northwest									
Wheat	84	151	56	11,383	12,471	91	57	64	13,995
Corn	55	55	100	5,115	7,438	69	28	37	9,198
Soybeans	444	317	140	8,649	5,954	145	107	85	7,321
Total	**582**	**522**	**112**	**25,147**	**25,863**	**97**	**80**	**75**	**30,513**
Mississippi Gulf									
Wheat	74	99	75	4,968	4,636	107	98	103	5,031
Corn	145	203	71	16,554	22,710	73	51	48	26,267
Soybeans	1,041	1,049	99	18,817	15,167	124	134	124	19,262
Total	**1,261**	**1,351**	**93**	**40,340**	**42,513**	**95**	**103**	**97**	**50,560**
Texas Gulf									
Wheat	73	71	103	5,349	10,064	53	96	65	10,837
Corn	0	0	n/a	336	884	38	0	0	1,021
Soybeans	61	13	464	449	814	55	556	60	926
Total	**134**	**84**	**159**	**6,134**	**11,763**	**52**	**131**	**54**	**12,784**
Interior									
Wheat	29	22	133	1,062	1,010	105	99	152	1,110
Corn	41	135	30	5,765	6,403	90	78	56	7,509
Soybeans	83	75	111	3,764	3,706	102	42	88	4,273
Total	**153**	**231**	**66**	**10,591**	**11,119**	**95**	**100**	**76**	**12,892**
Great Lakes									
Wheat	25	40	61	436	935	47	123	71	1,038
Corn	0	0	n/a	56	159	35	n/a	0	178
Soybeans	29	50	59	472	233	203	154	85	382
Total	**54**	**90**	**60**	**964**	**1,327**	**73**	**143**	**78**	**1,598**
Atlantic									
Wheat	0	0	n/a	341	659	52	0	0	686
Corn	0	0	n/a	139	259	54	9	6	295
Soybeans	28	72	39	819	639	128	147	93	1,042
Total	**28**	**72**	**39**	**1,298**	**1,557**	**83**	**99**	**62**	**2,022**
U.S. total from ports[2]									
Wheat	285	382	75	23,539	29,775	79	78	75	32,697
Corn	241	393	61	27,964	37,853	74	42	44	44,466
Soybeans	1,686	1,575	107	32,970	26,513	124	125	103	33,205
Total	**2,212**	**2,350**	**94**	**84,473**	**94,142**	**90**	**92**	**83**	**110,369**

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

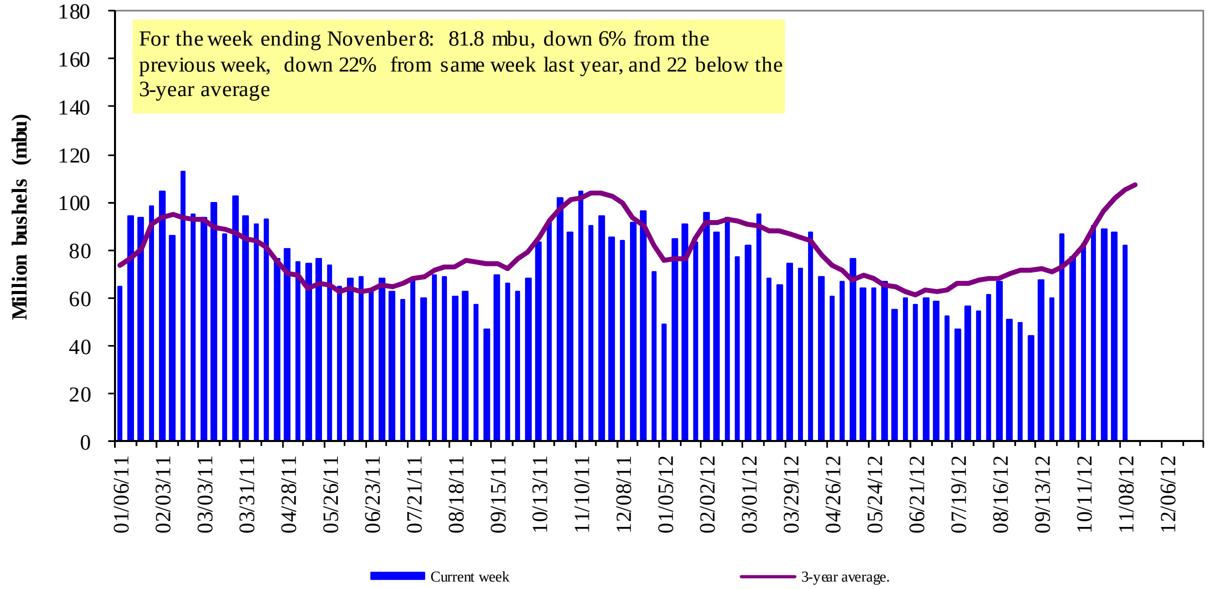
[2] Total includes only port regions shown above; Interior land-based shipments now included.

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 59 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2011.

Figure 14

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

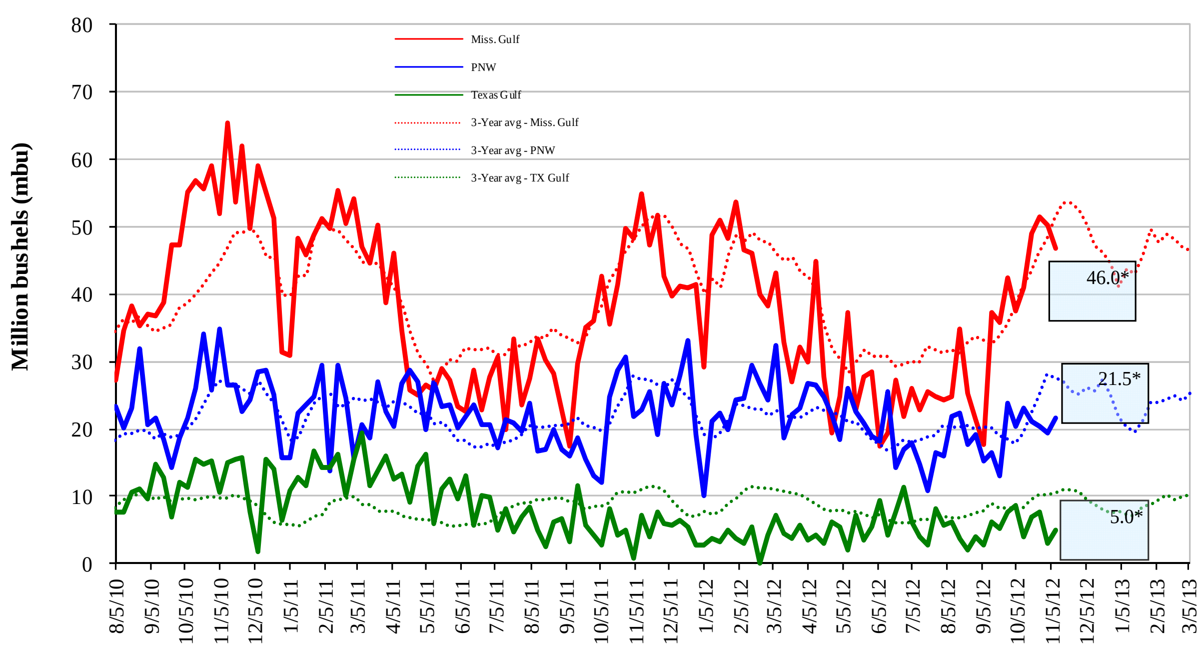


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

November 8 % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 7	up 59	down 3	up 12
Last year (same week)	down 15	down 32	down 17	down 6
3-yr avg. (4-wk mov. avg.)	down 9	down 53	down 17	down 12

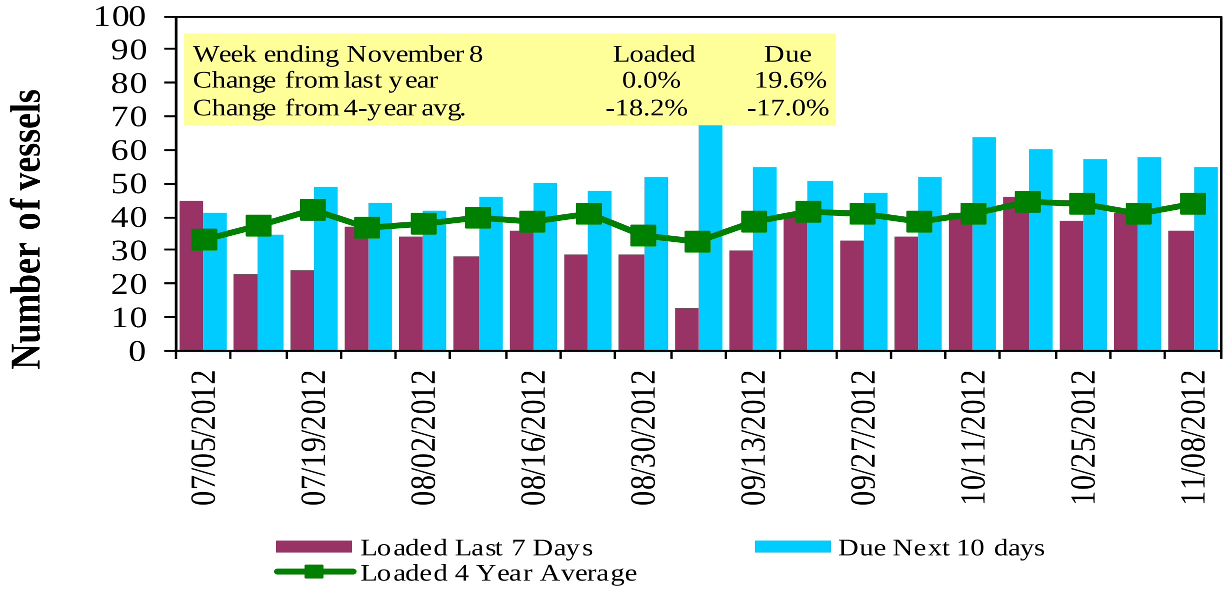
Ocean Transportation

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
11/8/2012	44	36	55	10	n/a
11/1/2012	42	41	58	12	n/a
2011 range	(14..65)	(28..54)	(34..83)	(5..25)	(1..20)
2011 avg.	31	38	53	15	12

Source: Transportation & Marketing Programs/AMS/USDA

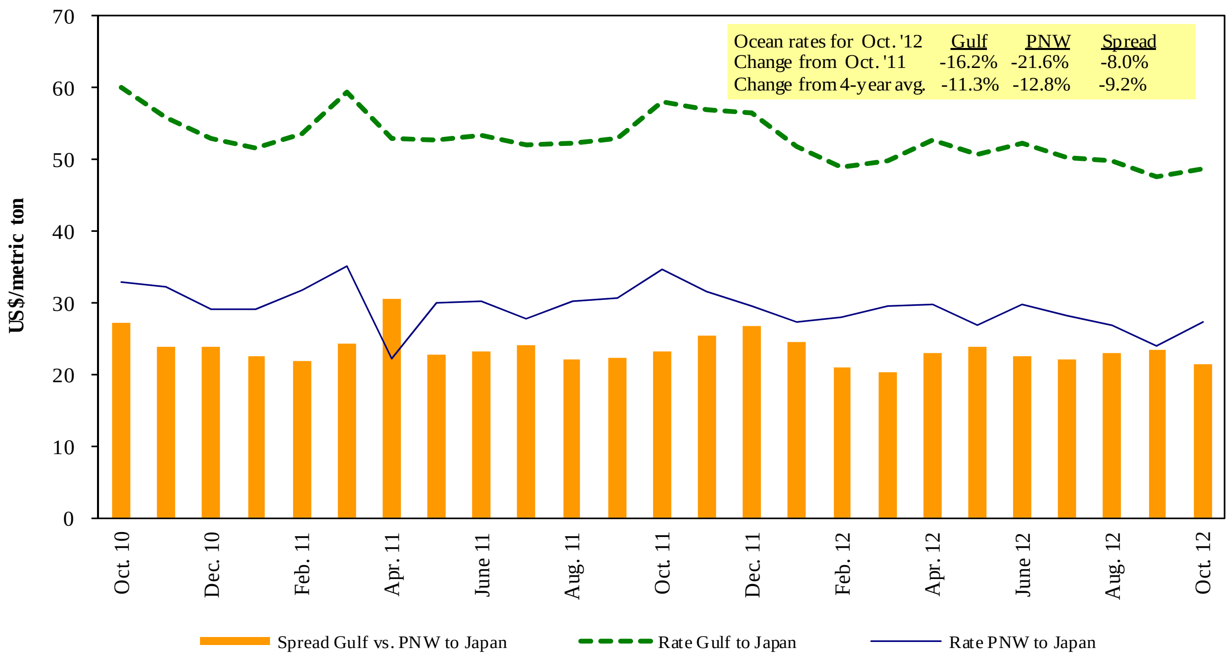
Figure 16
U.S. Gulf[1] Vessel Loading Activity



Source:Transportation & Marketing Programs/AMS/USDA

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 11/10/2012

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Nov 20/30	55,000	43.00
U.S. Gulf	China	Heavy Grain	Nov 20/25	55,000	44.85
U.S. Gulf	China	Heavy Grain	Nov 15/25	55,000	49.00
U.S. Gulf	China	Heavy Grain	Nov 10/20	55,000	46.00
U.S. Gulf	China	Heavy Grain	Nov 9/19	55,000	48.00
U.S. Gulf	China	Heavy Grain	Nov 5/10	55,000	46.00
U.S. Gulf	China	Heavy Grain	Oct 20/30	55,000	43.75
U.S. Gulf	China	Heavy Grain	Oct 15/24	55,000	43.00
U.S. Gulf	Mozambique[1]	Wheat	Sep 20/30	10,000	211.50
Brazil	Portugal	Heavy Grain	Nov 10/20	60,000	15.50
France	Algeria	Wheat	Nov 2/7	25,000	22.00
India	S.Korea	Wheat	Oct5/15	55,000	15.00
River Plate	Tunisia	Heavy Grain	Oct 5/15	30,000	28.50
River Plate	Algeria	Wheat	Nov 7/9	40,000	25.00
Ukraine	S. Arabia	Barley	Oct 25/30	56,500	25.25

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

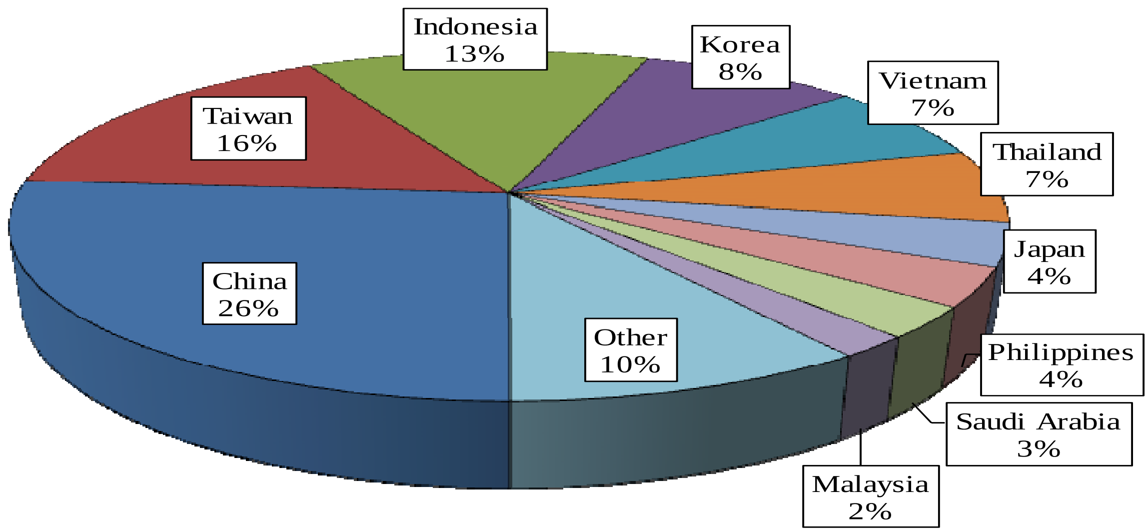
[1]50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2011, containers were used to transport 7 percent of total U.S. waterborne grain exports, up 2 percentage points from 2010. Approximately 11 percent of U.S. waterborne grain exports in 2011 went to Asia in containers, up 4 percentage points from 2010. Asia is the top destination for U.S. containerized grain exports—96 percent in 2011.

Figure 18

Top 10 Destination Markets for U.S. Containerized Grain Exports, August 2012

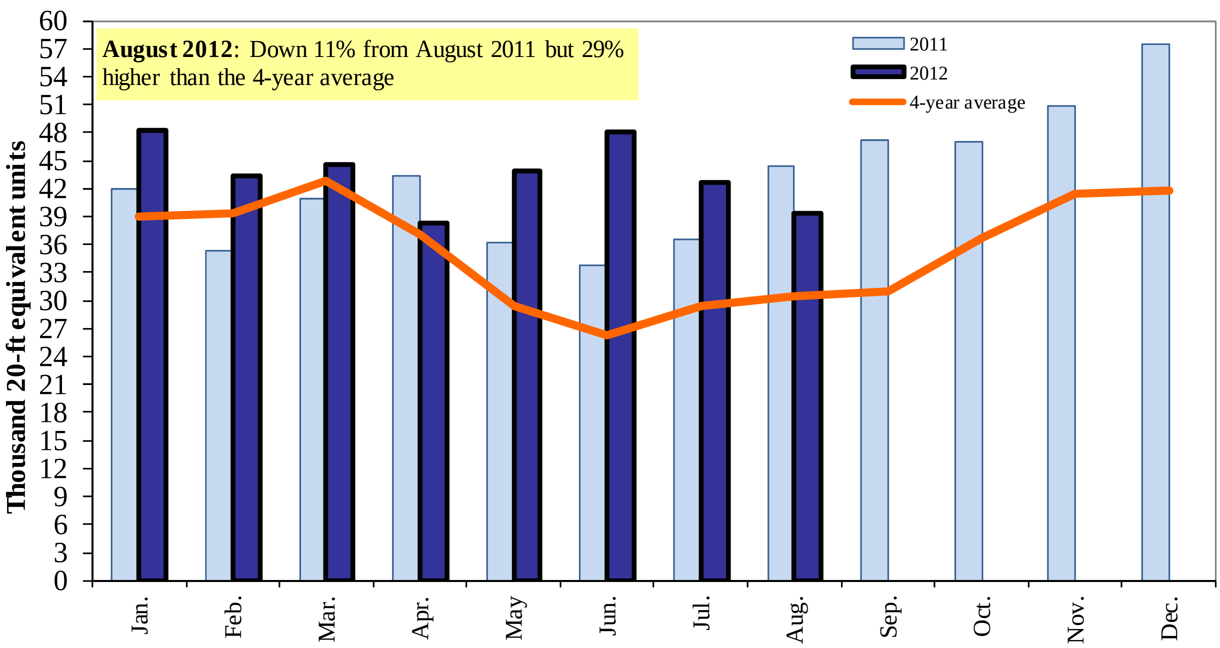


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

Figure 19

Monthly Shipments of Containerized Grain to Asia



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

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

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