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Agricultural Marketing Service

Grain Transportation Report

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

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March 7, 2013

Contents

The next release is March 14, 2013

WEEKLY HIGHLIGHTS

River Navigation Improves

On February 27, the rock removal operations between St. Louis, MO, and Cairo, IL, were completed. The operations were conducted to maintain a 300-foot wide channel with a 9 –foot draft. All navigation restrictions in the vicinity of the rock removal have been lifted by the U.S. Coast Guard. On March 2, the main lock chamber at Mississippi River Locks 27 was reopened after being closed for repairs since December 10. During the week ending March 2, Mississippi River Locks 15 reported downbound grain shipments for the first time this year.

Total Grain Inspections Increase; Corn Continues to Increase

For the week ending February 28, total grain inspections (corn, wheat, and soybeans) reached 2.15 million metric tons (mmt), up 32 percent from the past week but 1 percent below last year at this time. Grain inspections increased in each of the major export regions. Mississippi Gulf and Texas Gulf grain inspections jumped more than 40 percent from the past week. Corn inspections (.401 mmt) rose 34 percent, increasing for the second consecutive week. Wheat (.653 mmt) inspections increased 13 percent from the past week, and soybeans (1.1 mmt) jumped 45 percent as shipments to Asia rebounded. Outstanding (unshipped) export sales of corn were unchanged from the previous week but wheat and soybean outstanding sales dropped slightly.

Drivers Hours of Service Court Case

On March 15, the U.S. Court of Appeals for the District of Columbia will hear arguments on the Federal Motor Carrier Safety Administration's (FMCSA) final rule on drivers' hours of service. FMCSA denied requests by the American Trucking Associations and the Commercial Vehicle Safety Alliance to delay full implementation of the rule until after the Court makes a decision. At issue are 30-minute off-duty breaks, 11 hours of daily driving, and the ability to use a 34-hour off-duty period to restart drivers' workweek calculations. Effective July 1, drivers may drive only if 8 hours or less have passed since the end of driver's last off-duty period of at least 30 minutes. A 34-hour restart, if used, must include two periods between 1 a.m. and 5 a.m. based on home terminal time, and may only be used once per week. Unaffected by the rule are the statutory 150 air-mile radius exemption for drivers transporting agricultural commodities and farm supplies, and statutory exemptions for certain farm vehicles and drivers.

Snapshots by Sector

Rail

U.S. railroads originated 17,016 **carloads of grain** during the week ending February 23, down 9 percent from last week, 18 percent from last year, and 24 percent lower than the 3-year average.

During the week ending February 28, average March non-shuttle **secondary railcar bids/offers per car** were $15 below tariff, up $12.50 from last week and $8.50 lower than last year. Average shuttle bids/offers were $55.50 below tariff, up $9 from last week, and $78 higher than last year.

Barge

During the week ending March 2, **barge grain movements** totaled 337,788 tons, 20 percent lower than the previous week and 36 percent lower than the same period last year.

During the week ending March 2, 218 grain barges moved down river, down 19.3 percent from the previous week, and 503 grain barges were unloaded in New Orleans, down 14.6 percent from the previous week.

Ocean

During the week ending February 28, 33 **ocean-going grain vessels** were loaded in the Gulf, down 3 percent from the same period last year. Forty vessels are expected to be loaded within the next 10 days, 3 percent more than the same period last year.

During the week ending March 1, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $47 per mt, 1 percent higher than the previous week. The cost of shipping from the Pacific Northwest to Japan was $25 per mt, unchanged from the previous week.

Fuel

During the week ending March 4, U.S. average **diesel fuel prices** were down 3 cents from the previous week at $4.13 per gallon—4 cents higher than the same week last year.

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Web: http://dx.doi.org/10.9752/TS056.03-07-2013

Feature Article/Calendar

Soybean Transportation Cost Up, but Total Landed Cost Down

Although the transportation costs of shipping U.S. soybeans slightly increased during the 4th quarter of 2012, Europe and China imported more soybeans during October – December of 2012, compared to the previous year. Although soybean prices fell during the 4th quarter, pushing down the landed cost of soybeans, farmers still received higher prices than they did a year earlier. During the 4th quarter, 1.59 million metric tons (mmt) of U.S. soybeans were exported to Europe at a value of $0.93 billion (USDA, GATS). The quantity exported increased by 485 percent, while the value of the exports increased by 634 percent compared to a year earlier. China imported 13.02 mmt of soybeans—22 percent more than a year earlier (USDA, GATS). The value of China's imports was $7.96 billion—up 54 percent from a year ago. The quarter-to-quarter transportation costs of shipping soybeans from Minneapolis, MN, and Davenport, IA, to Hamburg, Germany, increased by 4 and 6 percent, respectively (table 1). Transportation costs from the same locations to Shanghai, China, increased by 3 and 4 percent, respectively (table 2). The quarter-to-quarter transportation costs of shipping from Fargo, ND, and Sioux City, SD, to Shanghai increased by only 1 percent.

Table 1-Quarterly costs of transporting soybeans from U.S. and Brazil to Hamburg, Germany

	2011 4th qtr.	2012 3rd qtr.	2012 4th qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2011 4th qtr.	2012 3rd qtr.	2012 4th qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.
	United States (via U.S. Gulf)									
	Minneapolis, MN --$/mt--					Davenport, IA --$/mt--				
Truck	10.22	13.51	10.86	6.26	-19.62	10.22	13.51	10.86	6.26	-19.62
Barge	35.28	32.34	41.08	16.44	27.03	28.91	24.86	33.95	17.43	36.56
Ocean[1]	25.08	21.81	18.68	-25.52	-14.35	25.08	21.81	18.68	-25.52	-14.35
Total transportation[2]	70.58	67.66	70.62	0.06	4.37	64.21	60.18	63.49	-1.12	5.50
Farm Value[3]	418.88	562.42	518.09	23.68	-7.88	425.00	565.85	522.99	23.06	-7.57
Landed Cost	489.46	630.08	588.71	20.28	-6.57	489.21	626.03	586.48	19.88	-6.32
Transport % of landed cost	14.42	10.74	12.00			13.13	9.61	10.83		
	Brazil									
	North MT[4] - Santos[5] --$/mt--					South GO[4] - Paranagua[5] --$/mt--				
Truck	115.05	109.73	109.80	-4.56	0.06	54.06	53.01	53.11	-1.76	0.19
Ocean[6]	32.00	32.00	28.00	-12.50	-12.50	32.63	34.30	34.30	5.12	0.00
Total transportation[2]	147.05	141.73	137.80	-6.29	-2.77	86.69	87.31	87.41	0.83	0.11
Farm Value [7]	358.24	570.66	536.60	49.79	-5.97	379.70	566.91	557.54	46.84	-1.65
Landed Cost	505.29	712.39	674.40	33.47	-5.33	466.39	654.22	644.95	38.29	-1.42
Transport % of landed cost	29.10	19.90	20.43			18.59	13.35	13.55		

[1]Source: O'Neil Commodity Consulting
[3]Source: USDA/NASS
[4]Producing regions: MT= Mato Grosso, GO = Goiás
[5]Export ports
[6]Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS
[7]Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br
Note: Total may not add exactly due to rounding

The costs of shipping from Minneapolis and Davenport were pushed up by the seasonal increase in barge rates during harvest season. Barge rates normally increase during the 4th quarter in anticipation of the closure of the Upper Mississippi River during winter. This year rates also increased due to drought-related navigation restrictions. Increased rail tariff rates pushed up the cost of shipping from Fargo and Sioux Falls. Rail rates increased partly due to an increase in fuel surcharges during the quarter (see GTR, figure 7). However, the quarter-to-quarter landed costs for all shipments fell because of the reduction in soybean farm prices. Farm prices fell 5 to 8 percent in the United States during the 4th quarter.

The transportation costs of shipping from North Mato Grosso (MT), Brazil, to Hamburg decreased during the quarter, while the cost of shipping from South Goiás remained the same. The costs of shipping from the same locations to Shanghai remained relatively unchanged. As they did in the United States, quarter-to-quarter farm prices fell in Brazil, leading to reduced landed costs. In general, year-to-year transportation costs fell in both the United States and Brazil. The quarter-to-quarter drop in farm prices slightly pushed up the transportation share of the landed costs in both countries. The transportation share of the landed costs ranged from 11 to 16 percent in the United States and 14 to 23 percent in Brazil.

Table 2-Quarterly costs of transporting soybeans from U.S. and Brazil to Shanghai, China

	2011 4th qtr.	2012 3rd qtr.	2012 4th qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2011 4th qtr.	2012 3rd qtr.	2012 4th qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.
	United States (via U.S. Gulf)									
	Minneapolis, MN					Davenport, IA				
	--$/mt--					--$/mt--				
Truck	10.22	13.51	10.86	6.26	-19.62	10.22	13.51	10.86	6.26	-19.62
Barge	35.28	32.34	41.08	16.44	27.03	28.91	24.86	33.95	17.43	36.56
Ocean[1]	55.33	46.82	43.69	-21.04	-6.69	55.33	46.82	43.69	-21.04	-6.69
Total transportation[2]	100.83	92.67	95.63	-5.16	3.19	94.46	85.19	88.50	-6.31	3.89
Farm Value[3]	418.88	562.42	518.09	23.68	-7.88	425.00	565.85	522.99	23.06	-7.57
Landed Cost	519.71	655.09	613.72	18.09	-6.32	519.46	651.04	611.49	17.72	-6.07
Transport % of landed cost	19.40	14.15	15.58			18.18	13.09	14.47		
	Via PNW									
	Fargo, ND					Sioux Falls, SD				
Truck	10.22	13.51	10.86	6.26	-19.62	10.22	13.51	10.86	6.26	-19.62
Ocean[1]	29.79	23.88	23.58	-20.85	-1.26	29.79	23.88	23.58	-20.85	-1.26
Rail	54.05	53.95	57.87	7.07	7.27	55.77	55.66	59.64	6.94	7.15
Total transportation[2]	94.06	91.34	92.31	-1.86	1.06	95.78	93.05	94.08	-1.77	1.11
Farm Value[3]	415.20	542.58	515.64	24.19	-4.97	417.65	552.38	516.86	23.75	-6.43
Landed Cost	509.26	633.92	607.95	19.38	-4.10	513.43	645.43	610.94	18.99	-5.34
Transport % of landed cost	18.47	14.41	15.18			18.65	14.42	15.40		
	Brazil									
	North MT[4] - Santos[5]					South GO[4] - Paranagua[5]				
	--$/mt--					--$/mt--				
Truck	115.05	109.73	109.80	-4.56	0.06	54.06	53.01	53.11	-1.76	0.19
Ocean[6]	49.65	50.42	50.42	1.55	0.00	55.80	55.42	55.42	-0.68	0.00
Total transportation[2]	164.70	160.15	160.22	-2.72	0.04	109.86	108.43	108.53	-1.21	0.09
Farm Value[7]	358.24	570.66	536.60	49.79	-5.97	379.70	566.91	557.54	46.84	-1.65
Landed Cost	522.94	730.81	696.82	33.25	-4.65	489.56	675.34	666.07	36.05	-1.37
Transport % of landed cost	31.50	21.91	22.99			22.44	16.06	16.29		

[1]Source: O'Neil Commodity Consulting

[3]Source: USDA/NASS

[4]Producing regions: MT= Mato Grosso, GO = Goiás

[5]Export ports

[6]Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS

[7]Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br

Market Outlook: Europe and China imported more soybeans in 2012 than in the previous year. During the period, 2.64 million metric tons (mmt) of U.S. soybeans were exported to Europe at a value of $1.48 billion (USDA, GATS). The quantity exported increased 73 percent, while the value of the exports increased 86 percent from a year earlier. China imported 26.34 mmt of soybeans—up 28 percent compared to a year earlier (USDA, GATS). The value of China's imports was $14.97 billion—up 43 percent compared to a year ago. The trend is expected to continue during the marketing year (MY) 2012/13 as the forecasts for domestic soybean production in China were lowered due to a significant drop in planted area in Heilongjiang province (***GAIN Report #: CH12061***). Many farmers in the Northeastern producing regions substituted more profitable corn and rice crops for soybeans in MY 2012/13. Total Chinese soybean imports for MY 2012/13 are forecast at 61 mmt. Continued strong Chinese demand for soybeans and soybean meal is driven in part by the crushing sector's effort to regain losses from edible oil price control, and in part by the dynamic demand from the animal production sector, especially the swine sector (***GAIN Report #: CH12061***). Lower landed cost may continue to boost the demand for U.S. soybeans. For more on soybean transportation, see ***Brazil Soybean Transportation Indicators Report***.
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Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
Week ending		Unit Train	Shuttle		Gulf	Pacific
03/06/13	277	231	206	181	210	177
02/27/13	279	232	206	182	208	177

[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	3/1/2013	2/22/2013
Corn	IL--Gulf	-0.57	-0.53
Corn	NE--Gulf	-0.65	-0.59
Soybean	IA--Gulf	-0.97	-1.05
HRW	KS--Gulf	-1.62	-1.68
HRS	ND--Portland	-2.07	-1.84

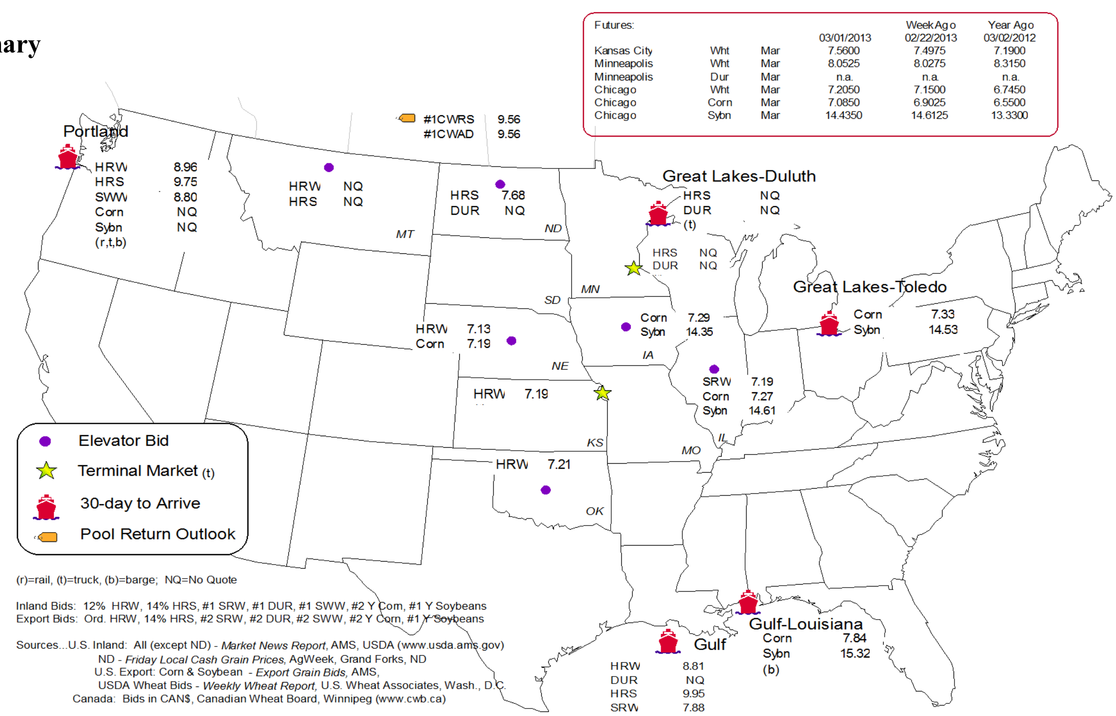
Note: nq = no quote

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]
02/27/2013[p]	168	425	3,682	502	4,777	02/23/13	1,195
02/20/2013[r]	249	1,195	4,889	570	6,903	02/16/13	1,002
2013 YTD[r]	7,386	6,483	38,595	6,730	59,194	2013 YTD	9,730
2012 YTD[r]	2,421	6,057	41,011	4,553	54,042	2012 YTD	17,505
2013 YTD as % of 2012 YTD	305	107	94	148	110	% change YTD	56
Last 4 weeks as % of 2012[2]	121	132	84	132	95	Last 4wks % 2012	61
Last 4 weeks as % of 4-year avg.[2]	69	52	104	98	89	Last 4wks % 4 yr	76
Total 2012	22,604	40,780	199,419	31,389	287,462	Total 2011	97,118
Total 2011	27,358	77,515	191,187	24,088	320,148	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 switching between KCSM and FerroMex.

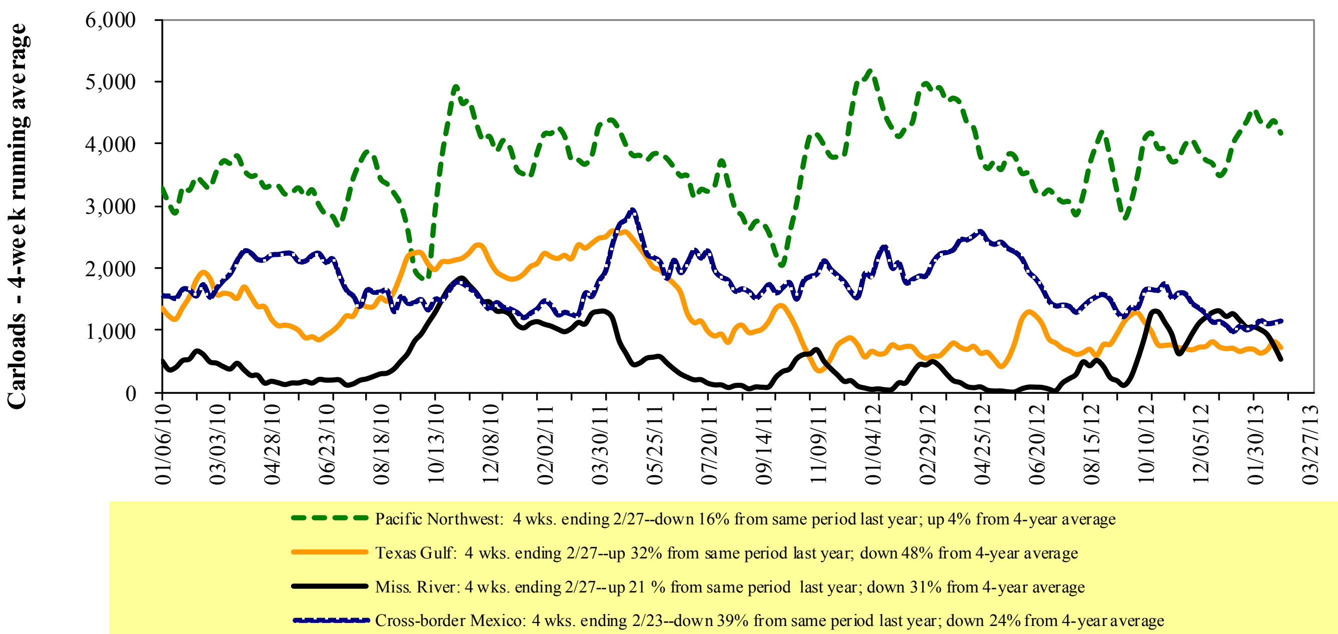
YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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)

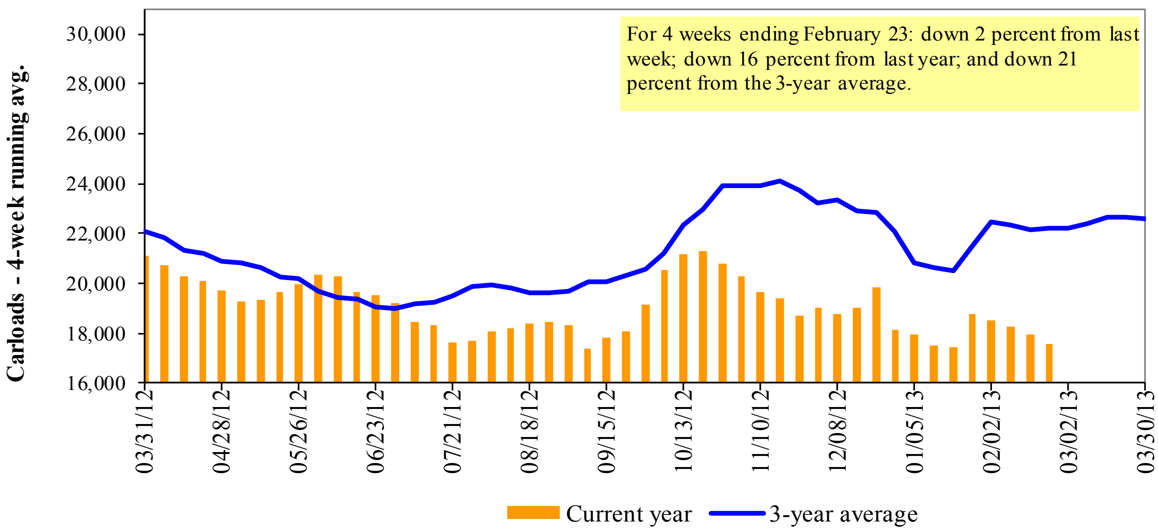
	East		West			U.S. total	Canada	
Week ending	CSXT	NS	BNSF	KCS	UP		CN	CP
02/23/13	1,509	2,618	8,690	441	3,758	17,016	2,871	3,641
This week last year	1,933	3,012	10,252	461	4,996	20,654	3,705	5,099
2013 YTD	12,898	21,501	76,378	4,048	30,367	145,192	29,358	42,429
2012 YTD	17,635	23,859	80,309	4,024	41,066	166,893	30,421	40,817
2013 YTD as % of 2012 YTD	73	90	95	101	74	87	97	104
Last 4 weeks as % of 2012	77	85	89	98	75	84	81	94
Last 4 weeks as % of 3-yr avg.[1]	81	87	84	73	68	80	84	100
Total 2012	85,384	145,336	515,638	26,936	244,077	1,017,371	204,068	266,266

[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							
2/28/2013	Mar-13	Mar-12	Apr-13	Apr-12	May-13	May-12	Jun-13	Jun-12
BNSF[3]								
COT grain units	0	3	no bids	0	no bids	0	no bids	0
COT grain single-car[5]	0 . . 15	0 . . 10	1 . . 10	0 . . 10	no bids	1	no bids	0 . . 1
UP[4]								
GCAS/Region 1	no bids	1	no bids	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	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.

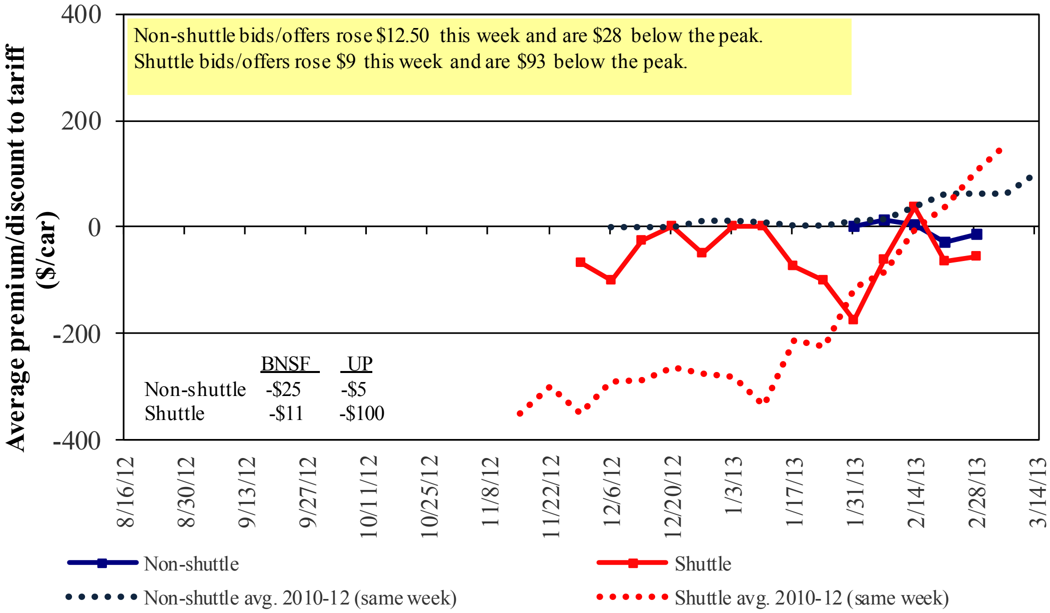
[5]Range is shown because average is not available. Not available = n/a.

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 March 2013, Secondary Market

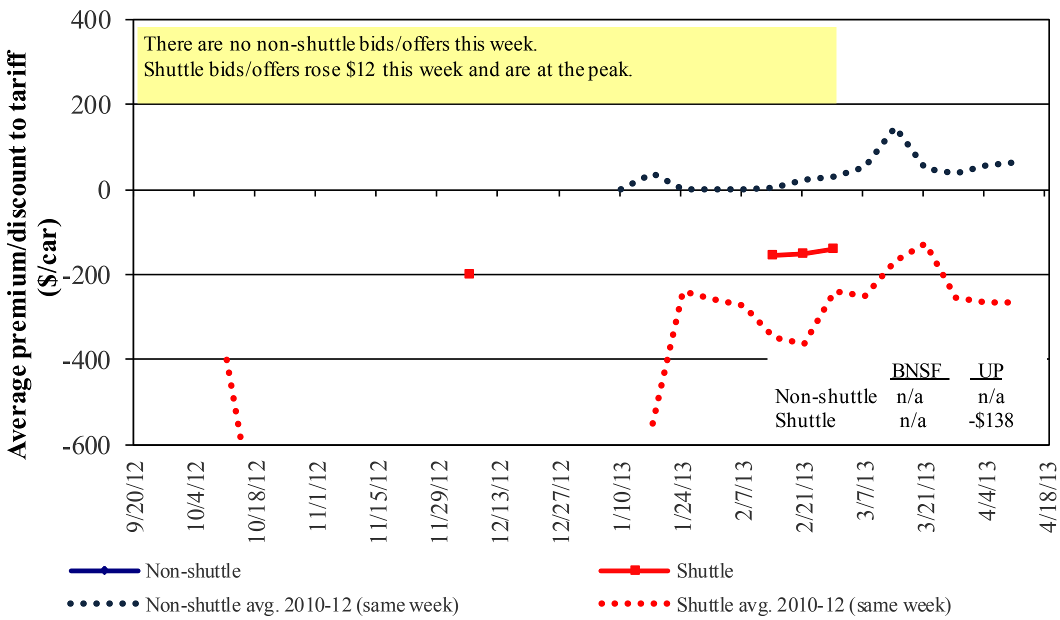


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

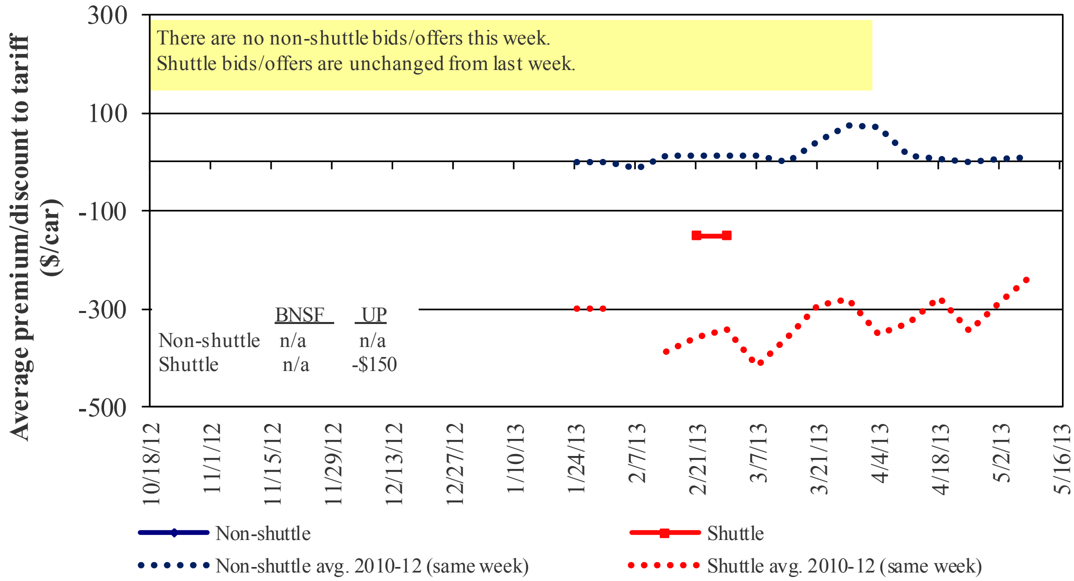


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in May 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					
2/28/2013	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13
Non-shuttle						
BNSF-GF	(25)	n/a	n/a	n/a	n/a	n/a
Change from last week	25	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	(12)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(5)	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	(5)	n/a	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	(11)	n/a	n/a	n/a	n/a	n/a
Change from last week	14	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	168	n/a	n/a	n/a	n/a	n/a
UP-Pool	(100)	(138)	(150)	n/a	n/a	(100)
Change from last week	4	12	-	n/a	n/a	(50)
Change from same week 2011	(12)	162	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 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: 3/1/2013	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	$187	$33.08	$0.90	5
	Grand Forks, ND	Duluth-Superior, MN	$3,543	$107	$36.25	$0.99	9
	Wichita, KS	Los Angeles, CA	$6,026	$551	$65.31	$1.78	3
	Wichita, KS	New Orleans, LA	$3,645	$329	$39.47	$1.07	4
	Sioux Falls, SD	Galveston-Houston, TX	$5,573	$452	$59.83	$1.63	0
	Northwest KS	Galveston-Houston, TX	$3,912	$361	$42.43	$1.15	4
	Amarillo, TX	Los Angeles, CA	$4,112	$502	$45.82	$1.25	4
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,110	$372	$34.58	$0.94	3
	Toledo, OH	Raleigh, NC	$4,508	$416	$48.89	$1.33	3
	Des Moines, IA	Davenport, IA	$2,006	$79	$20.70	$0.56	4
	Indianapolis, IN	Atlanta, GA	$3,920	$312	$42.03	$1.14	3
	Indianapolis, IN	Knoxville, TN	$3,354	$200	$35.29	$0.96	3
	Des Moines, IA	Little Rock, AR	$3,154	$232	$33.62	$0.92	3
	Des Moines, IA	Los Angeles, CA	$5,065	$675	$57.00	$1.55	2
Soybeans	Minneapolis, MN	New Orleans, LA	$3,579	$402	$39.53	$1.08	2
	Toledo, OH	Huntsville, AL	$3,575	$295	$38.43	$1.05	2
	Indianapolis, IN	Raleigh, NC	$4,578	$419	$49.62	$1.35	3
	Indianapolis, IN	Huntsville, AL	$3,267	$200	$34.43	$0.94	3
	Champaign-Urbana, IL	New Orleans, LA	$3,599	$372	$39.44	$1.07	6
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,580	$317	$38.70	$1.05	7
	Wichita, KS	Galveston-Houston, TX	$3,634	$247	$38.54	$1.05	12
	Chicago, IL	Albany, NY	$3,771	$390	$41.32	$1.12	4
	Grand Forks, ND	Portland, OR	$5,061	$547	$55.69	$1.52	5
	Grand Forks, ND	Galveston-Houston, TX	$6,082	$570	$66.06	$1.80	4
	Northwest KS	Portland, OR	$4,880	$592	$54.34	$1.48	3
Corn	Minneapolis, MN	Portland, OR	$4,800	$666	$54.28	$1.48	1
	Sioux Falls, SD	Tacoma, WA	$4,760	$610	$53.33	$1.45	1
	Champaign-Urbana, IL	New Orleans, LA	$2,929	$372	$32.78	$0.89	3
	Lincoln, NE	Galveston-Houston, TX	$3,310	$356	$36.40	$0.99	1
	Des Moines, IA	Amarillo, TX	$3,510	$291	$37.75	$1.03	3
	Minneapolis, MN	Tacoma, WA	$4,800	$661	$54.23	$1.48	1
	Council Bluffs, IA	Stockton, CA	$4,200	$684	$48.50	$1.32	1
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,320	$610	$58.89	$1.60	6
	Minneapolis, MN	Portland, OR	$5,330	$666	$59.55	$1.62	6
	Fargo, ND	Tacoma, WA	$5,230	$543	$57.32	$1.56	6
	Council Bluffs, IA	New Orleans, LA	$3,950	$429	$43.49	$1.18	6
	Toledo, OH	Huntsville, AL	$2,750	$295	$30.24	$0.82	3
	Grand Island, NE	Portland, OR	$5,195	$606	$57.60	$1.57	2

[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: 3/1/2013				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	$6,262	$579	$69.90	$1.90	-17
	OK	Cuautitlan, EM	$6,552	$703	$74.13	$2.02	-2
	KS	Guadalajara, JA	$7,444	$679	$83.00	$2.26	-2
	TX	Salinas Victoria, NL	$3,553	$265	$39.01	$1.06	-3
Corn	IA	Guadalajara, JA	$7,699	$799	$86.82	$2.20	-1
	SD	Celaya, GJ[5]	$8,113	$757	$90.63	$2.30	n/a
	NE	Queretaro, QA	$7,153	$710	$80.34	$2.04	1
	SD	Salinas Victoria, NL	$5,700	$576	$64.12	$1.63	1
	MO	Tlalnepantla, EM	$6,592	$689	$74.40	$1.89	4
	SD	Torreon, CU	$6,522	$634	$73.12	$1.86	0
Soybeans	MO	Bojay (Tula), HG	$7,580	$674	$84.34	$2.29	7
	NE	Guadalajara, JA	$8,134	$771	$90.99	$2.47	1
	IA	El Castillo, JA	$8,555	$753	$95.10	$2.59	4
	KS	Torreon, CU	$6,651	$478	$72.84	$1.98	2
Sorghum	TX	Guadalajara, JA	$6,464	$493	$71.08	$1.80	-2
	NE	Celaya, GJ[5]	$6,997	$688	$78.51	$1.99	n/a
	KS	Queretaro, QA	$6,815	$432	$74.04	$1.88	6
	NE	Salinas Victoria, NL	$5,438	$506	$60.73	$1.54	6
	NE	Torreon, CU	$6,153	$564	$68.64	$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

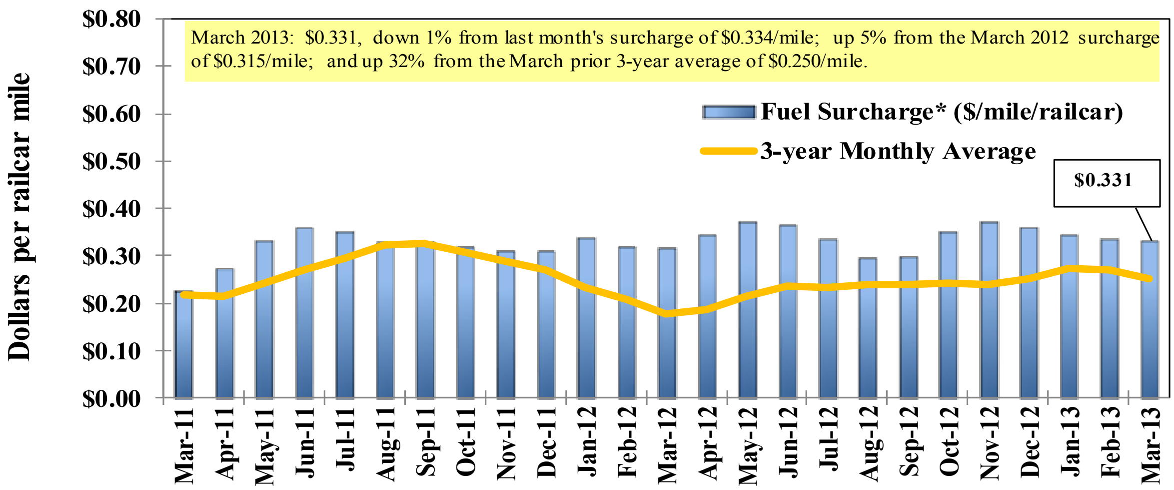
[4]Percentage change year over year calculated using tariff rate plus fuel surchage

[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.

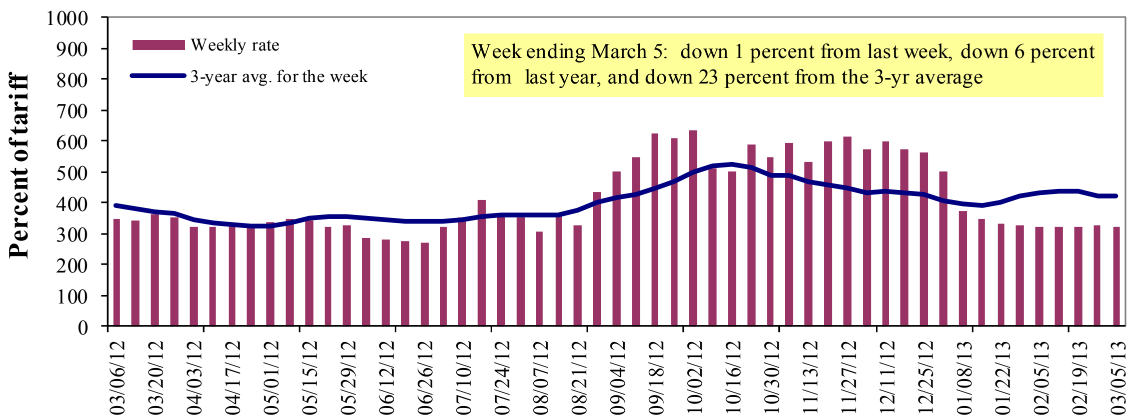
** BNSF strike price (diesel price when fuel surcharges begin) changed from $1.25/gal. to $2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was $0.227/mile instead of $0.331/mile.

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]	3/5/2013	-	345	325	250	230	230	185
	2/26/2013	-	-	327	254	220	220	185
$/ton	3/5/2013	-	18.35	15.08	9.98	10.79	9.29	5.81
	2/26/2013	-	-	15.17	10.13	10.32	8.89	5.81
Current week % change from the same week:								
	Last year	-	-	-6	-2	-29	-29	-19
	3-year avg. [2]	-	-	-23	-23	-36	-36	-36
Rate[1]	April	355	315	308	250	210	198	193
	June	343	305	300	250	225	225	203

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds: - closed for winter or no rates

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

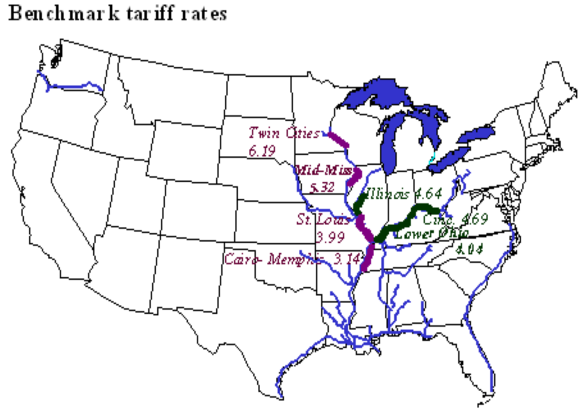
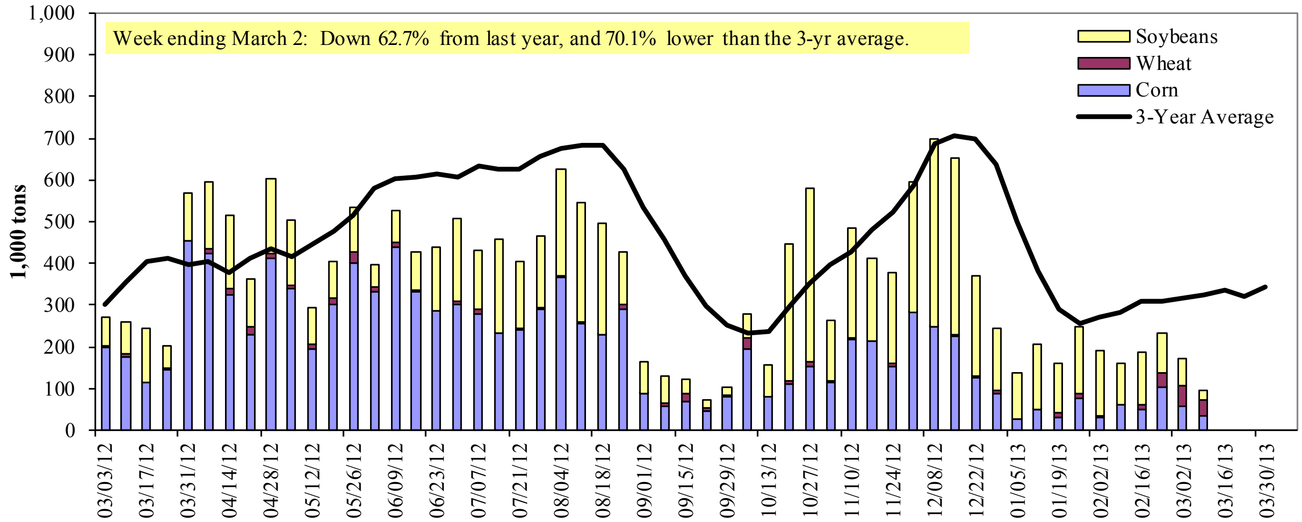


Figure 10

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 3/2/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	5	0	3	0	8
Winfield, MO (L25)	20	8	2	0	30
Alton, IL (L26)	57	47	43	0	147
Granite City, IL (L27)	50	61	33	0	143
Illinois River (L8)	35	33	31	0	99
Ohio River (L52)	75	34	57	0	166
Arkansas River (L1)	0	19	10	0	29
Weekly total - 2013	124	114	99	0	338
Weekly total - 2012	280	43	193	9	525
2013 YTD[1]	829	662	2,414	46	3,950
2012 YTD	3,078	255	2,290	45	5,668
2013 as % of 2012 YTD	27	259	105	102	70
Last 4 weeks as % of 2012[2]	31	32	84	79	67
Total 2012	14,837	1,794	12,663	229	29,523

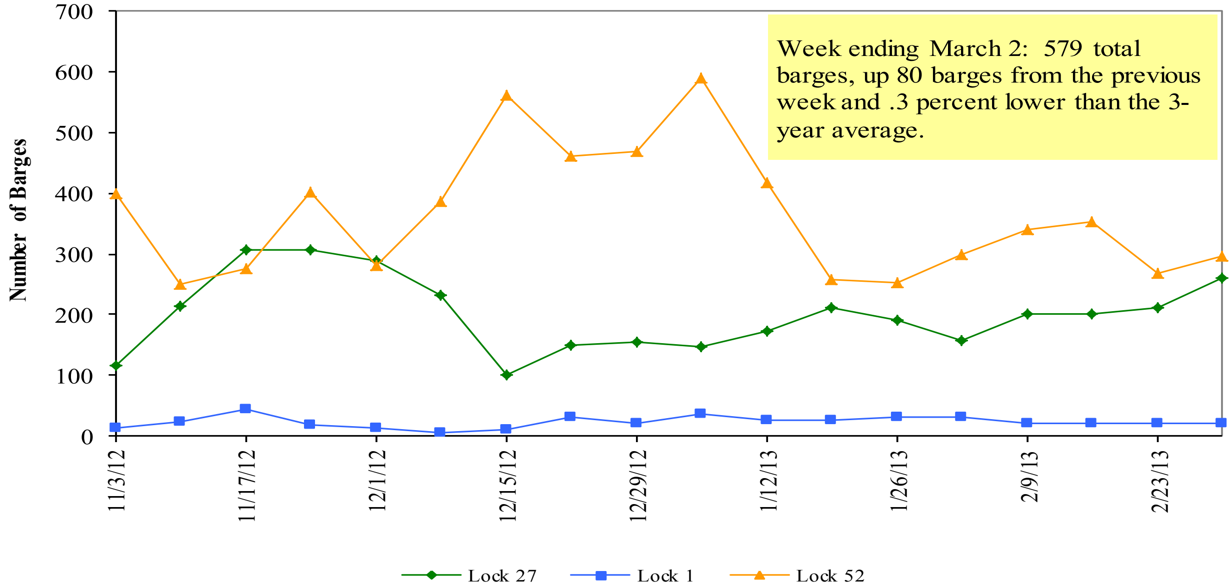
[1] Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

[2] As a percent of same period in 2012.

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

Figure 11

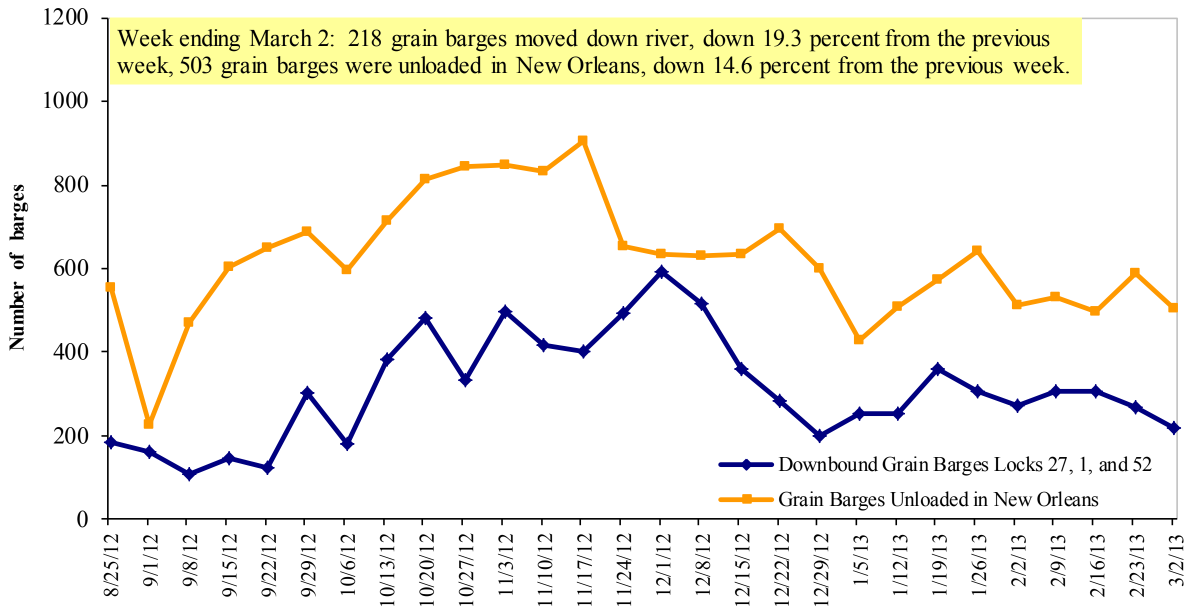
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



Source: U.S. Army Corps of Engineers

Figure 12

Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices[1], Week Ending 3/4/2013 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	4.167	-0.034	0.000
	New England	4.298	-0.046	0.045
	Central Atlantic	4.235	-0.027	-0.008
	Lower Atlantic	4.092	-0.037	-0.002
II	Midwest[2]	4.085	-0.036	0.111
III	Gulf Coast[3]	4.065	-0.024	0.045
IV	Rocky Mountain	4.047	-0.010	0.061
V	West Coast	4.280	-0.019	-0.092
	West Coast less California	4.207	-0.014	-0.068
	California	4.341	-0.024	-0.113
Total	U.S.	4.130	-0.029	0.036

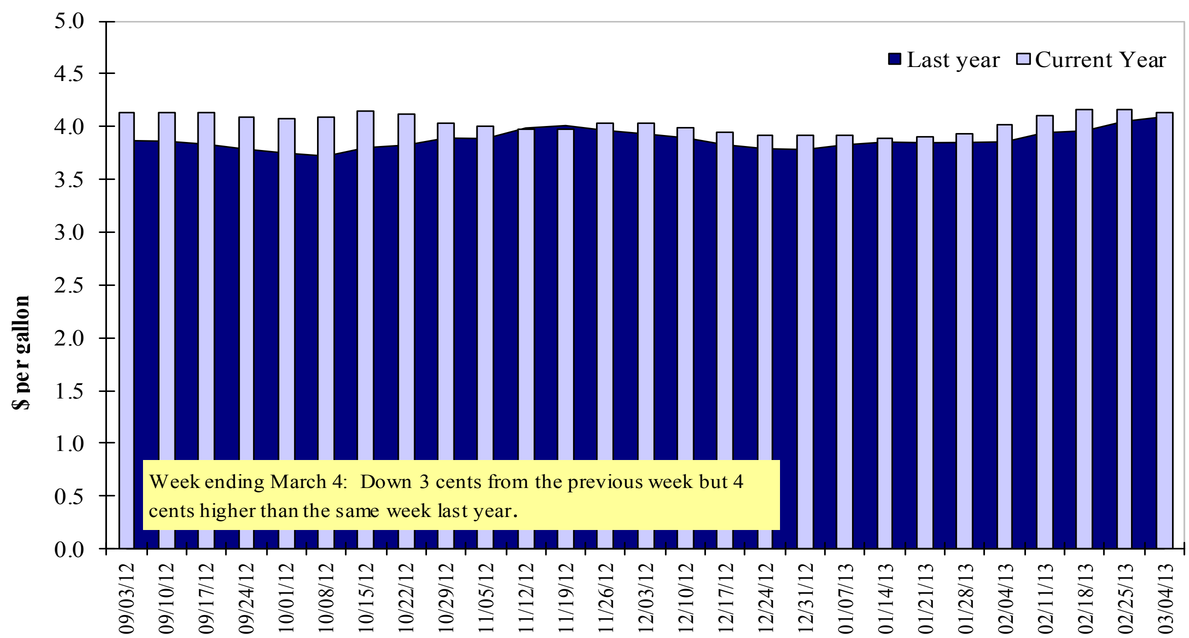
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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	Wheat SRW	Wheat HRS	Wheat SWW	Wheat DUR	Wheat All wheat	Corn	Soybeans	Total
Export Balances[1]									
2/21/2013	1,755	1,652	1,223	804	81	5,514	5,477	4,636	15,627
This week year ago	1,272	951	1,238	1,812	22	5,295	10,601	5,548	21,444
Cumulative exports-marketing year[2]									
2012/13 YTD	6,517	2,702	4,197	3,436	356	17,206	9,070	29,964	56,240
2011/12 YTD	7,355	2,422	4,730	3,720	388	18,614	20,253	23,312	62,179
YTD 2012/13 as % of 2011/12	89	112	89	92	92	92	45	129	90
Last 4 wks as % of same period 2011/12	140	167	95	51	398	105	52	100	77
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 02/21/2013	Total Commitments[2] 2012/13 Current MY	Total Commitments[2] 2011/12 Last MY	% change current MY from last MY	Exports[3] 2011/12
	- 1,000 mt -			- 1,000 mt -
Japan	4,871	8,072	(40)	12,367
Mexico	3,343	7,889	(58)	9,617
China	1,971	3,776	(48)	5,414
Korea	360	3,254	(89)	3,639
Venezuela	396	566	(30)	1,332
Top 5 Importers	**10,940**	**23,557**	**(54)**	**32,369**
Total US corn export sales	**14,546**	**30,854**	**(53)**	**39,180**
% of Projected	64%	79%		
Change from prior week	**303**	**690**		
Top 5 importers' share of U.S. corn export sales	75%	76%		83%
USDA forecast, February 2013	**22,860**	**39,180**	**(42)**	
Corn Use for Ethanol USDA forecast, Ethanol February 2013	**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 02/21/2013	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	21,214	19,490	9	24,602
Mexico	1,743	1,978	(12)	3,180
Japan	1,398	1,274	10	1,891
Indonesia	1,051	997	5	1,741
Egypt	611	647	(6)	1,292
Top 5 importers	**26,017**	**24,386**	**7**	**32,706**
Total US soybean export sales	**34,599**	**28,860**	**20**	**37,060**
% of Projected	95%	78%		
Change from prior week	689	549		
Top 5 importers' share of U.S. soybean export sales	75%	84%		
USDA forecast, February 2013	**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 02/21/2013	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	3,077	3,310	(7)	3,512
Mexico	2,557	3,127	(18)	3,496
Nigeria	2,490	2,716	(8)	3,248
Philippines	1,812	1,872	(3)	2,039
Korea	1,373	1,747	(21)	1,983
Egypt	1,129	445	154	950
Taiwan	890	797	12	888
Indonesia	434	695	(38)	830
Venezuela	569	540	5	594
Iraq	209	572	(63)	572
Top 10 importers	**14,539**	**15,821**	**(8)**	**18,111**
Total US wheat export sales	**22,721**	**23,910**	**(5)**	**28,560**
% of Projected	79%	84%		
Change from prior week	373	414		
Top 10 importers' share of U.S. wheat export sales	64%	66%		63%
USDA forecast, February 2012	**28,580**	**28,560**	**0.1**	

(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 02/28/13	Previous Week[1]	Current Week as % of Previous	2013 YTD[1]	2012 YTD[1]	2013 YTD as % of 2012 YTD	Last 4-weeks as % of 2012	Last 4-weeks as % of 3-yr. avg.	Total[1] 2012
Pacific Northwest									
Wheat	243	300	81	2,225	2,156	103	94	111	12,625
Corn	78	62	127	690	969	71	66	58	5,512
Soybeans	399	263	152	2,677	2,389	112	110	122	10,347
Total	**721**	**624**	**115**	**5,591**	**5,513**	**101**	**96**	**104**	**28,484**
Mississippi Gulf									
Wheat	205	145	141	1,286	821	157	235	251	5,462
Corn	273	206	132	1,638	4,305	38	45	38	18,068
Soybeans	521	362	144	5,630	5,512	102	81	78	24,684
Total	**999**	**713**	**140**	**8,553**	**10,637**	**80**	**78**	**71**	**48,215**
Texas Gulf									
Wheat	184	127	145	921	790	117	185	65	5,912
Corn	2	2	100	7	63	11	8	4	336
Soybeans	0	0	n/a	122	0	n/a	n/a	36	626
Total	**187**	**129**	**144**	**1,050**	**854**	**123**	**168**	**54**	**6,874**
Interior									
Wheat	21	5	425	174	165	105	327	53	1,218
Corn	47	28	166	383	1,470	26	134	29	6,115
Soybeans	100	102	98	829	835	99	42	101	4,204
Total	**168**	**136**	**124**	**1,386**	**2,470**	**56**	**46**	**55**	**11,538**
Great Lakes									
Wheat	0	0	n/a	2	0	n/a	n/a	0	481
Corn	0	0	n/a	0	14	0	n/a	0	56
Soybeans	0	0	n/a	3	1	319	181	544	713
Total	**0**	**0**	**n/a**	**5**	**15**	**33**	**181**	**32**	**1,250**
Atlantic									
Wheat	0	0	n/a	108	2	6,953	n/a	260	341
Corn	0	0	n/a	2	38	5	17	7	143
Soybeans	77	29	263	528	260	203	294	153	1,460
Total	**77**	**29**	**263**	**638**	**299**	**213**	**327**	**143**	**1,944**
U.S. total from ports[2]									
Wheat	653	577	113	4,715	3,934	120	134	114	26,040
Corn	401	299	134	2,719	6,859	40	42	38	30,230
Soybeans	1,097	757	145	9,790	8,996	109	95	92	42,035
Total	**2,151**	**1,632**	**132**	**17,224**	**19,788**	**87**	**85**	**78**	**98,305**

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

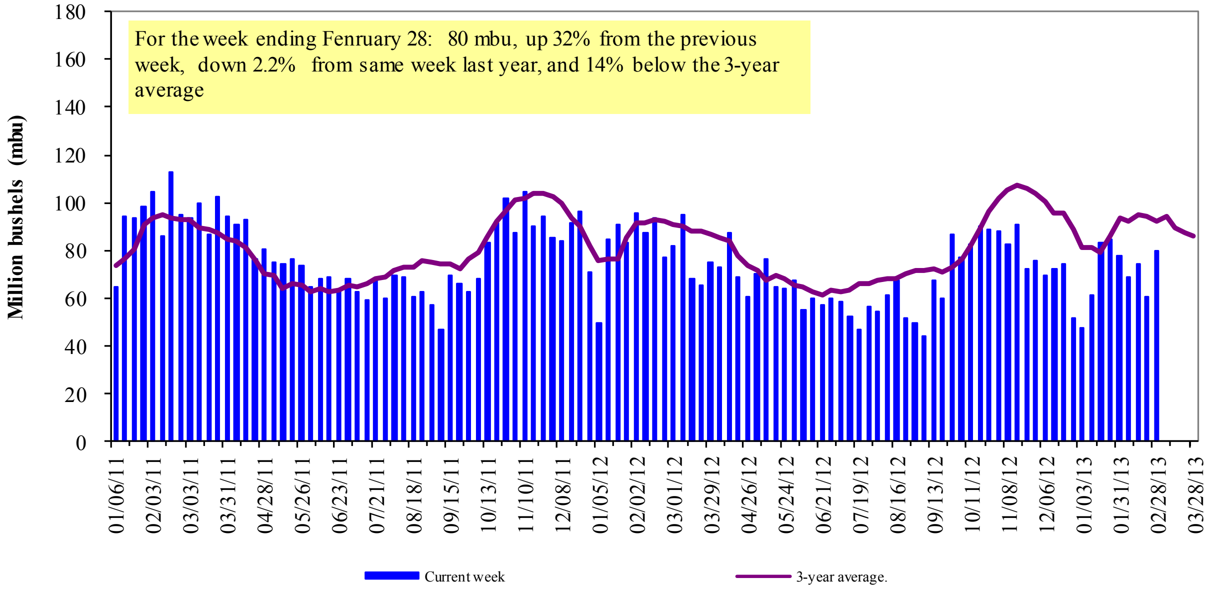
[2] Total includes only port regions shown above; Interior land-based shipments now included.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 56 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2012.

Figure 14

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

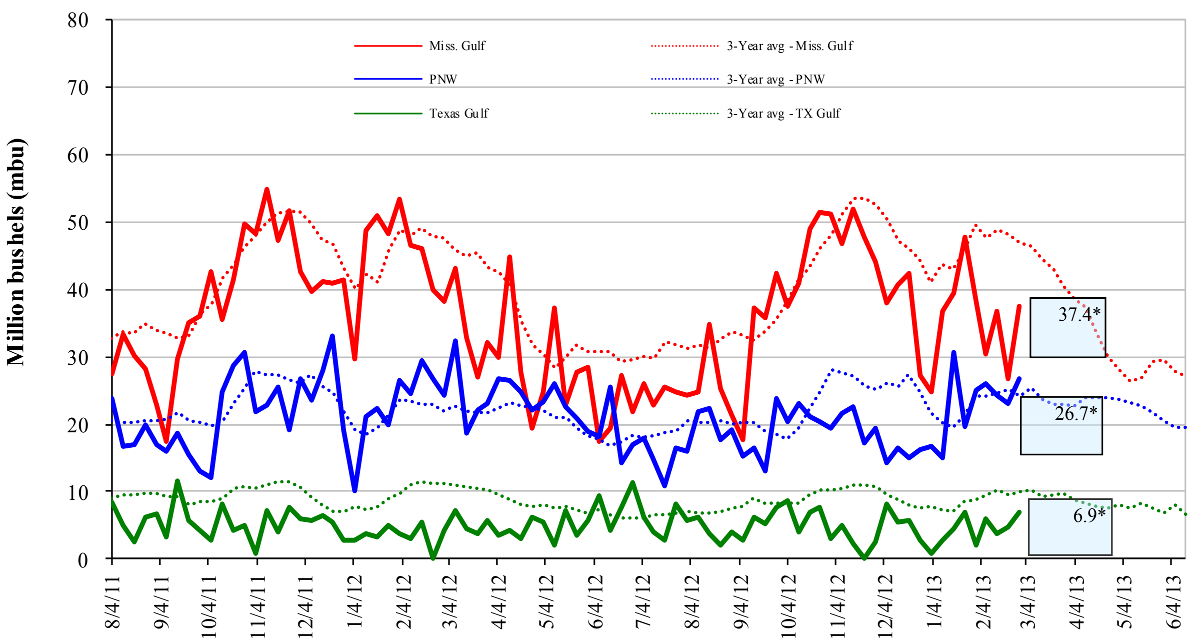


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

February 28 % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 40	up 44	up 41	up 16
Last year (same week)	down 2	up 62	up 4	up 9
3-yr avg. (4-wk mov. avg.)	down 20	down 31	down 22	up 15

Ocean Transportation

Table 17

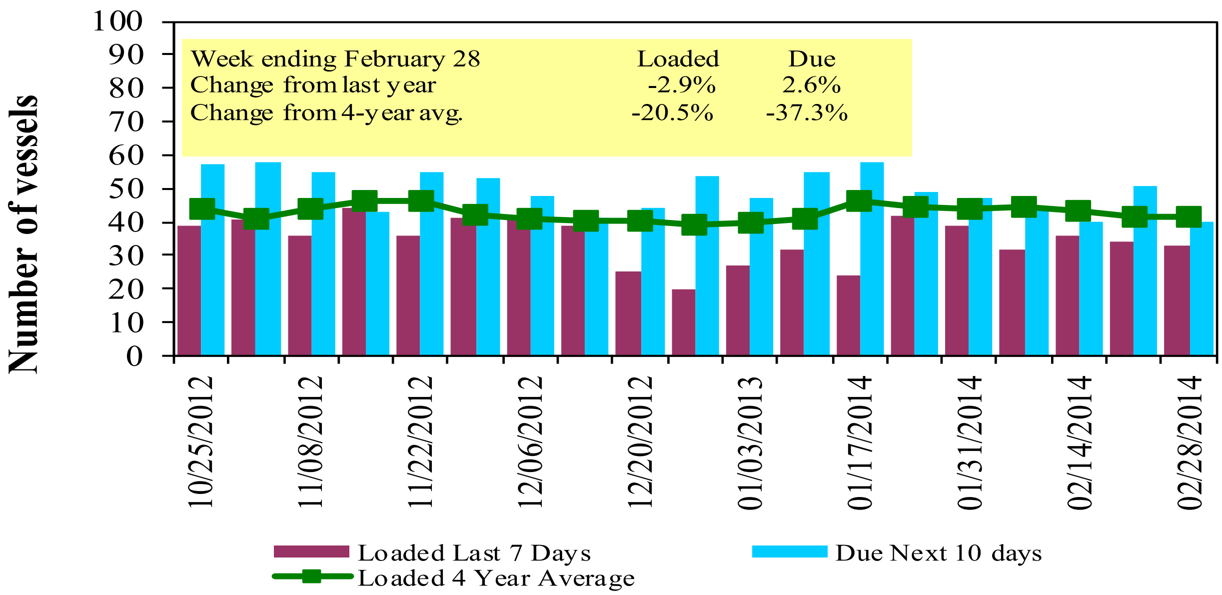
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
2/28/2013	28	33	40	16	n/a
2/21/2013	27	34	51	15	n/a
2012 range	(13..50)	(13..46)	(27..78)	(4..20)	n/a
2012 avg.	28	33	46	11	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

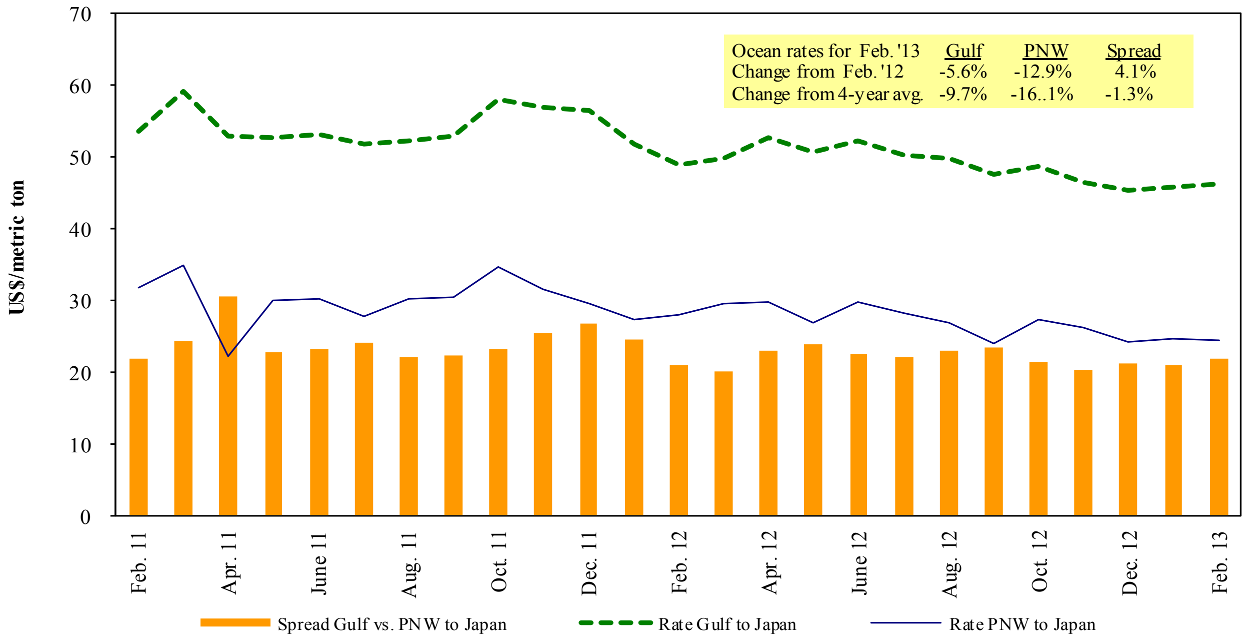
U.S. Gulf[1] Vessel Loading Activity



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 03/02/2013

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 25/Fe 5	55,000	43.05
U.S. Gulf	China	Heavy Grain	Jan 15/25	55,000	42.75
U.S. Gulf	China	Heavy Grain	Jan 10/18	55,000	43.00
U.S. Gulf	China	Heavy Grain	Jan 10/15	65,000	43.00
U.S. Gulf	China	Heavy Grain	Jan 25/Feb5	55,000	43.05
U.S. Gulf	Egypt Med	Heavy Grain	Feb 20/Mar 5	60,000	23.25
U.S. Gulf	China	Heavy Grain	Feb 1/5	54,000	20.50
U.S. Gulf	Djibouti[1]	Wheat & Sorghum	Feb 4/14	28,310	124.22
PNW	China	Heavy Grain	Feb 1/5	54,000	20.50
Australia	Italy	Heavy Grain	Feb 10/25	58,000	27.00
Brazil	China	Heavy Grain	Mar 1/10	60,000	38.25
Brazil	China	Heavy Grain	Mar 3/12	60,000	35.00
Brazi	China	Heavy Grain	May 1/5	60,000	35.35
Brazil	China	Heavy Grain	Feb 19/22	60,000	34.50
Brazil	China	Heavy Grain	Feb 10/19	60,000	35.50
Brazil	China	Heavy Grain	Feb 8/23	60,000	35.50
France	Algeria	Wheat	Feb 20/25	30,000	18.50
River Plate	Egypt	Heavy Grain	Jan 15/20	60,000	9.50

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

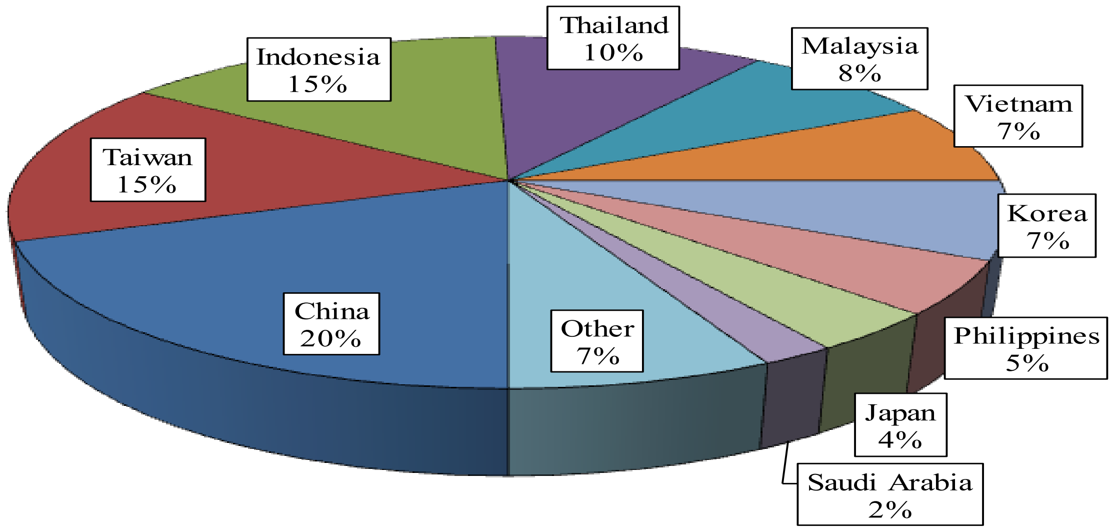
[1]50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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, November 2012

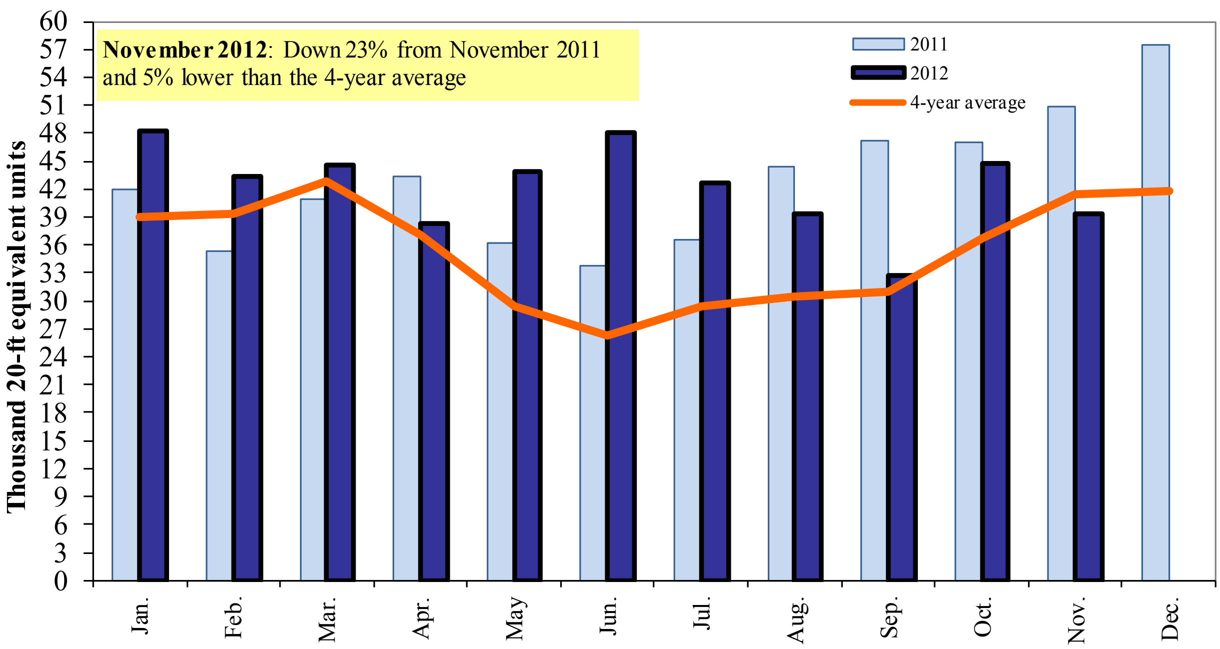


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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