Grain Transportation Report

A weekly publication of the
Transportation and Marketing Programs/Transportation Services Branch
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Contents

The next release is August 19, ’04

Barge Industry Struggles While Waiting for Big Corn Crop. From July 1 to August 7, weekly barge grain movements on the Mississippi River System (which includes downbound grain on Mississippi, Ohio, and Arkansas Rivers) were 30 percent below the 5-year average for the third quarter (see chart). First and second quarter grain shipments were 24 percent and 26 percent below the 5-year average, respectively.

Weekly grain barge shipments, 1999-2004

Year	1st quarter (Jan.-Mar.)	2d quarter (Apr.-June)	3d quarter (July-Sept.)	4th quarter (Oct.-Dec.)	Annual (Jan.-Dec.)
	1,000 tons				
1999	831	1,081	1,040	1,039	998
2000	799	948	975	989	928
2001	784	834	973	1,031	906
2002	900	1,013	912	1,084	977
2003	730	822	749	970	818
2004	612	695	655*	-	-
5-yr. avg.	809	940	930	1,023	925

* as of August 7, 2004

Currently, grain volumes are 18 percent below those of last year at this time (see table 10). The most significant decrease (46 percent) for the year has occurred in the volume of barged soybeans. Asia-bound grain from the river has been impacted by competitively lower west coast shipping rates, resulting in the shifting of some grain to the Pacific Northwest (PNW). The soybean situation has been further impacted by tight supplies of the crop which has also limited barge traffic. Barge companies that normally haul grain are moving non-grain products, such as steel components, to help sustain mid-summer revenues.

In addition, major repairs slowed traffic at Mississippi River Chain of Rocks Lock (Lock 27). The main chamber at Lock 27 was closed from July 26 to August 11. During that time, all traffic had to use the smaller 600-foot auxiliary chamber. Delays were extensive and double lockages required a helper boat. As of August 12, 2004, tows are experiencing a 62 hour delay to use the locks.

With a record 10.923 billion bushel corn crop projected for this year, barge shipments should increase significantly with the beginning of the harvest. There is some uncertainty, however, on how large a portion of the exports for this large crop will go down the river, especially with the volatile supply of dry bulk vessels and uncertainty regarding the size of future spreads between the U.S. Gulf-to-Japan and the PNW-to Japan ocean freight rates. Figure 12 shows that ocean freight rates for both PNW-to-Japan and Gulf-to-Japan routes decreased from April through June. In addition, the difference or spread between the rates is also decreasing. If this trend continues and export demand picks up, the last half of this year could turn into a much-needed busy fall season for the barge industry. Nick.Marathon@usda.gov

Grain Transportation Indicators

Table 1--Grain transport cost indicators*

Week ending	Truck	Rail	Barge	Ocean: Gulf	Ocean: Pacific
08/11/04	122	153	122	224	221
Compared with last week	↑	↓	↑	↓	↓

*Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = nearby secondary rail market ($/car); barge = spot Illinois River basis (index = percent of tariff rate); and ocean = routes to Japan ($/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2--Market update: U.S. origins to export position price spreads ($/bushel)

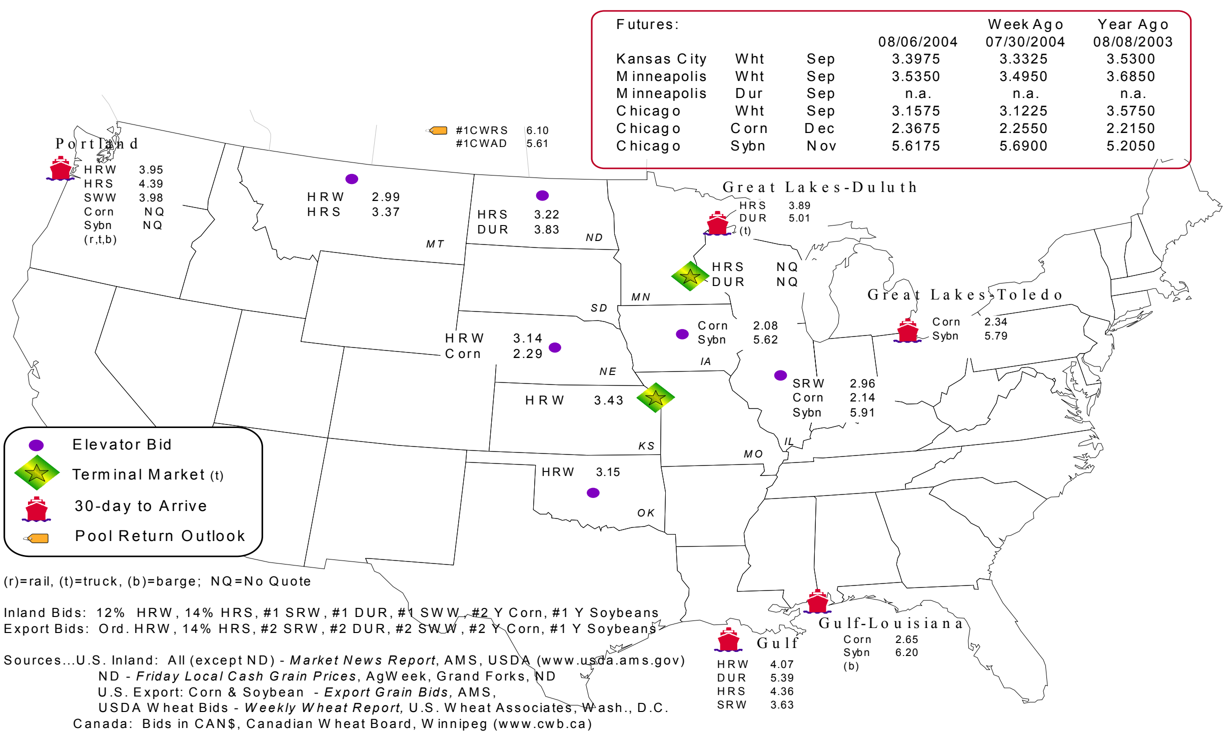
Commodity	Origin--destination	8/6/2004	7/30/2004
Corn	IL--Gulf	-0.51	-0.48
Corn	NE--Gulf	-0.36	-0.32
Soybean	IA--Gulf	-0.58	-0.53
HRW	KS--Gulf	-0.64	-0.76
HRS	ND--Portland	-1.17	-1.20

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)*

Week ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total
8/04/2004 p	35	1,180	2,380	15	3,610
7/28/2004 r	47	1,524	2,956	205	4,732
2004 YTD	4,876	64,677	124,633	4,569	198,755
2003 YTD	9,536	40,178	84,835	11,415	145,964
2004 as % of 2003	51	161	147	40	136
Total 2003**	14,934	88,118	150,530	20,509	274,091
Total 2002	10,937	84,625	111,832	20,842	228,236

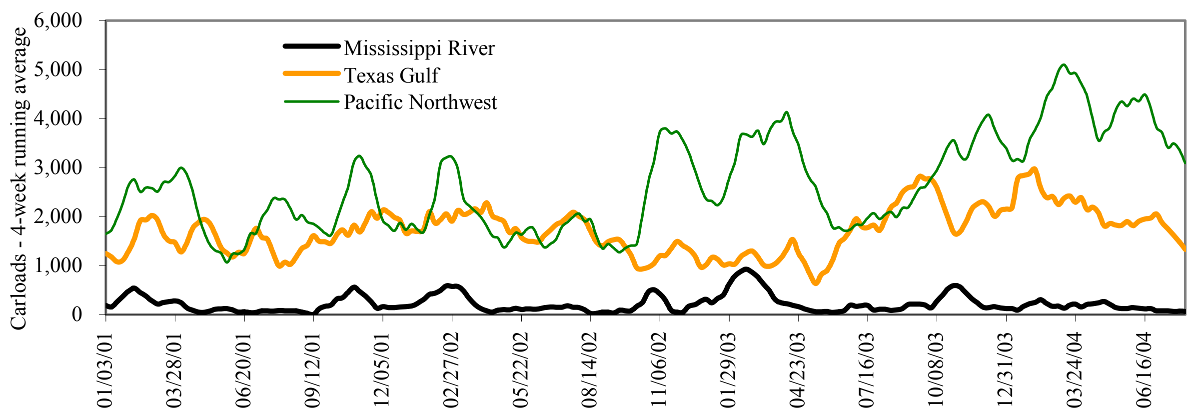
(*) Incomplete Data; (**) Excludes 53rd week;YTD = year-to-date; p = preliminary data; r = revised data

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 40 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

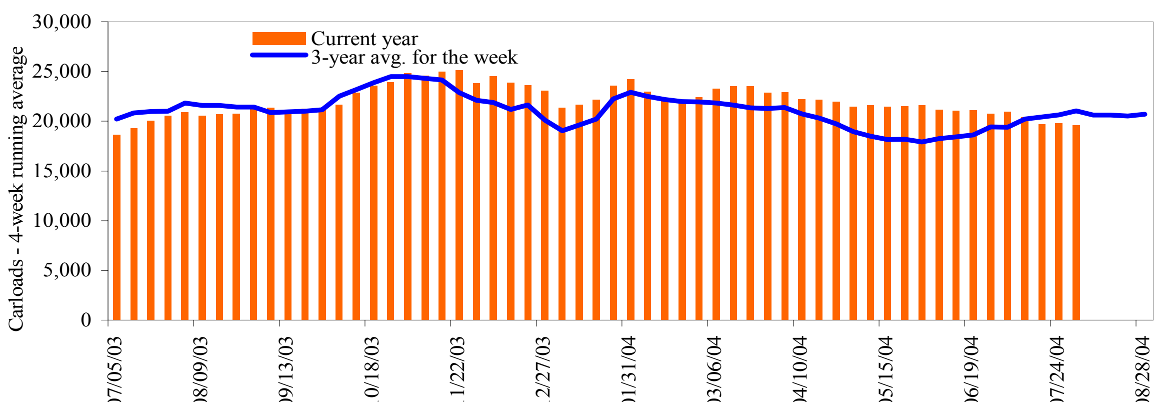
Rail deliveries to port



Source: Transportation & Marketing Programs/AMS/USDA

Figure 3

Total weekly U.S. grain car loadings for Class I railroads



Source: Association of American Railroads

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
07/31/04	2,127	3,020	7,251	428	6,098	18,924	4,307	4,149
This week last year	2,569	3,221	7,725	536	6,456	20,507	3,418	4,006
2004 YTD	85,207	97,617	261,003	14,412	196,862	655,101	140,415	116,217
2003 YTD	83,032	97,217	215,254	11,043	190,218	596,764	101,782	106,002
2004 as % of 2003	103	100	121	131	103	110	138	110
Total 2003*	146,395	171,260	416,371	24,506	336,079	1,094,611	197,993	198,185

Source: Association of American Railroads (www.aar.org); YTD = year-to-date; * Excludes 53rd week

Table 5--Rail car auction offerings, week ending 08/07/04 ($/car)*

Delivery for:	Sept. 04	Oct. 04	Nov. 04
BNSF[1]			
COT/N. grain	$37	$137	$86
COT/S. grain	$103	$185	$63
UP[2]			
GCAS/Region 1	$1	$1	no bid
GCAS/Region 2	$82	$113	no bid

*Average premium/discount to tariff, last auction

[1]BNSF - COT = Certificate of Transportation

N includes: ID, MN, MT, ND, OR, SD, WA, WI, WY, and Manitoba, Canada.

S includes: CO, IA, IL, KS, MO, NE, OK, TX, NM, AZ, CA, UT, and NV.

[2]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.

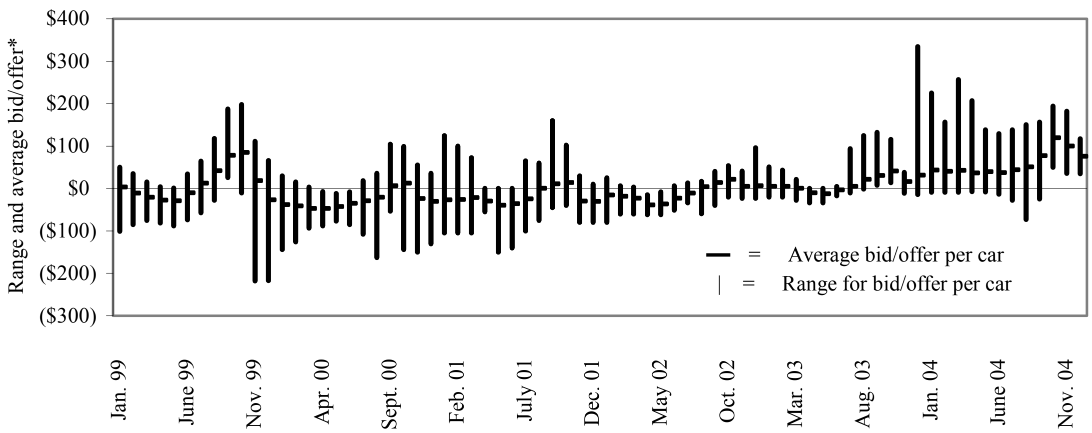
Source: Transportation & Marketing Programs/AMS/USDA

Rail service may be ordered directly from the railroad via **auction** for guaranteed service or tariff for nonguaranteed service or through the secondary market.

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

Secondary rail car market, delivery month-year



*up to 6 months of trading

Source: Transportation & Marketing Programs/AMS/USDA

Average bid/offer is the simple average of all the weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Range for bid/offer shows the range of average weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Table 6--Weekly secondary rail car market, week ending 08/06/04 ($/car)*

	Delivery period			
	Sept. 04	**Oct. 04**	**Nov. 04**	**Dec. 04**
BNSF-GF	$55	$91	$75	$113
Change from last week	-$39	-$17	$0	$25
UP-Pool	$60	$103	$120	$100
Change from last week	-$56	-$35	-$2	$8

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

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,
Missing value = no bid quoted; 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*

Effective date: 8/2/2004	Origin	Destination	Rate/car	Rate/metric ton	Rate/bushel**
Unit train*					
Wheat	Minneapolis, MN	Houston, TX	$2,120	$23.37	$0.64
	Kansas City, MO	Galveston, TX	$1,920	$21.16	$0.58
	Minneapolis, MN	Portland, OR	$4,148	$45.72	$1.24
	St. Louis, MO	Houston, TX	$2,095	$23.09	$0.63
	Kansas City, MO	Laredo, TX	$2,380	$26.23	$0.71
	Chicago, IL	Albany, NY	$1,834	$20.22	$0.55
	Chicago, IL	Richmond, VA	$1,961	$21.62	$0.59
Corn	Minneapolis, MN	Portland, OR	$3,240	$35.71	$0.91
	Chicago, IL	Baton Rouge, LA	$2,736	$30.16	$0.77
	Council Bluffs, IA	Baton Rouge, LA	$2,170	$23.92	$0.61
	Evansville, IN	Raleigh, NC	$1,841	$20.29	$0.52
	Council Bluffs, IA	Stockton, CA	$3,496	$38.54	$0.98
	Kansas City, MO	Dalhart, TX	$1,745	$19.24	$0.49
	Columbus, OH	Raleigh, NC	$1,750	$19.29	$0.49
	Des Moines, IA	Laredo, TX	$2,930	$32.30	$0.82
Soybeans	Minneapolis, MN	Portland, OR	$3,310	$36.49	$0.99
	Chicago, IL	Baton Rouge, LA	$2,736	$30.16	$0.82
	Council Bluffs, IA	Baton Rouge, LA	$2,799	$30.85	$0.84
	Des Moines, IA	Laredo, TX	$2,930	$32.30	$0.88
	Evansville, IN	Raleigh, NC	$1,841	$20.29	$0.55
	Chicago, IL	Raleigh, NC	$2,441	$26.91	$0.73
Shuttle Train*					
Wheat	St. Louis, MO	Houston, TX	$1,895	$20.89	$0.57
	Minneapolis, MN	Portland, OR	$3,993	$44.01	$1.20
Corn	Fremont, NE	Houston, TX	$2,425	$26.73	$0.68
	Minneapolis, MN	Portland, OR	$3,090	$34.06	$0.87
Soybeans	Council Bluffs, IA	Houston, TX	$2,255	$24.86	$0.63
	Minneapolis, MN	Portland, OR	$3,110	$34.28	$0.87

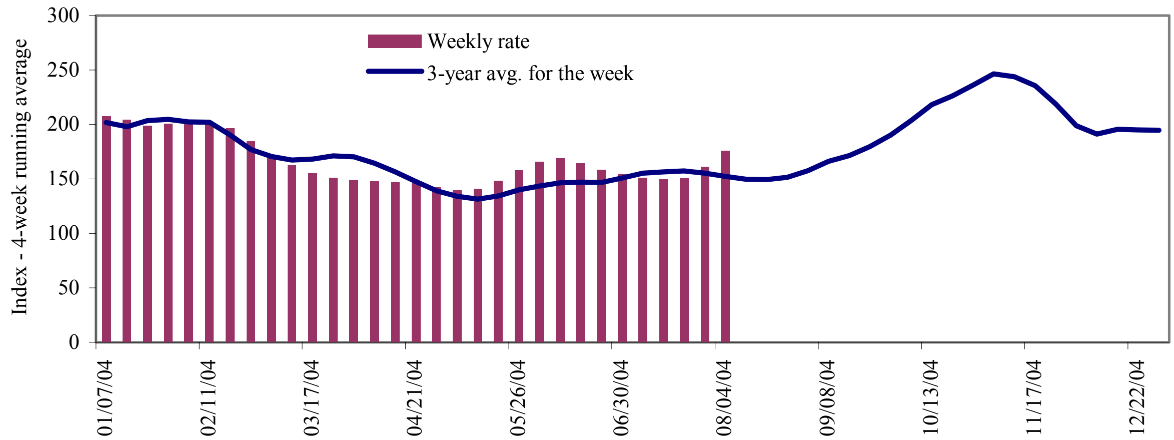
*A unit train refers to shipments of at least 52 cars. Shuttle train rates are available for qualified shipments of more than 100 cars that meet railroad efficiency requirements.

**Approximate load per car = 100 short tons: corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

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

Figure 5

Illinois River barge rate index - quotes



Note: Index = percent of tariff rate

Source: Transportation & Marketing Programs/AMS/USDA

The **Illinois River barge rate index** averaged 183 percent of the **benchmark tariff rates** between 1999 and 2001, based on weekly market quotes. The **index**, along with **rate quotes** and **futures market** bids are indicators of grain transport supply and demand.

Table 8--Barge rate quotes: southbound barge freight

Location	**8/4/2004**	**7/28/2004**	**Sept '04**	**Nov '04**
Twin Cities	221	198	279	279
Mid-Mississippi	212	181	270	241
Illinois River	210	194	268	229
St. Louis	180	151	258	187
Lower Ohio	181	154	268	198
Cairo-Memphis	177	144	251	187

Index = percent of tariff, based on 1976 tariff benchmark rate

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 6).

Note: The Illinois barge rate is for Beardstown, IL, Lagrange Lock & Dam (L&D 8).

Figure 6

Benchmark tariff rates

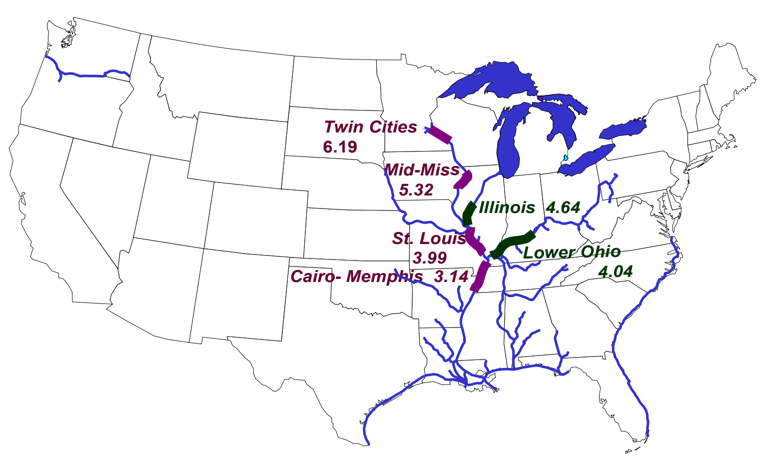


Table 9--Barge futures market (US$)*

Week ending	River/region	Contract period	Index rate Futures	Index rate Cash
6/15/2004	St. Louis	July	n/a	145
		Sept.	n/a	225
		Oct.	n/a	245
		Nov.	n/a	185
		Dec.	n/a	155
	Illinois River	July	n/a	165
		Sept.	n/a	235
		Oct.	n/a	270
		Nov.	n/a	215
		Dec.	n/a	185

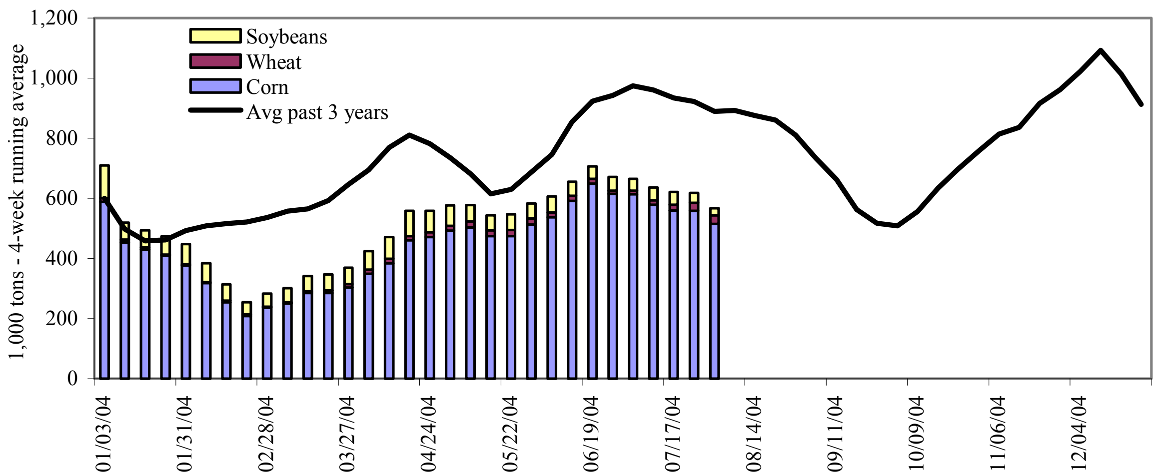
*Southbound barge freight nominal/cash basis values (US$)

Note: Index = percent of tariff, based on 1976 tariff benchmark rate

Source: Merchants Exchange of Chicago (www.merchants-exchange.com)

Figure 7

Barge movements on the Mississippi River (Lock 27 - Granite City, IL)



Source: Transportation & Marketing Programs/AMS/USDA

Table 10--Barge grain movements (1,000 tons)

Week ending 07/31/04	Corn	Wheat	Soybean	Other	Total
Mississippi River					
Rock Island, IL (L15)	296	26	11	0	332
Winfield, MO (L25)	346	27	17	2	391
Alton, IL (L26)	454	42	20	2	519
Granite City, IL (L27)	417	25	13	2	457
Illinois River (L8)	122	11	5	0	138
Ohio River (L52)	11	15	25	14	64
Arkansas River (L1)	0	10	0	0	10
2004 YTD	15,552	1,674	2,725	397	20,347
2003 YTD	17,799	1,346	5,090	474	24,710
2004 as % of 2003 YTD	87	124	54	84	82
Total 2003	29,898	2,787	9,146	695	42,526

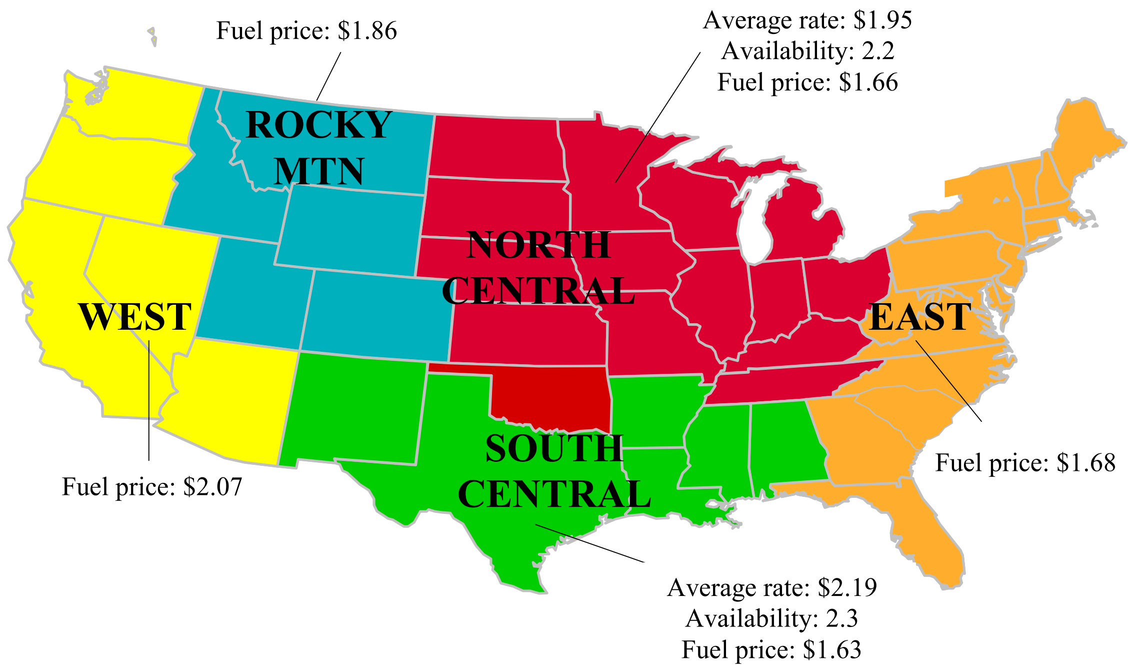
YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1. "Other" refers to oats, barley, sorghum, and rye.

Source: U.S. Army Corp of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webrpts/default.asp)

Note: Total may not add exactly, due to rounding

Truck Transportation

Figure 8
U.S. grain truck market advisory, 2nd quarter 2004*



*Average rate per loaded mile, based on truck rates for trips of 25, 100, and 200 miles
Note: Fuel prices are a quarterly average (unit per gallon)
Fuel price data source: Energy Information Administration, U.S. Department of Energy, www.eia.doe.gov

Table 11--U.S. grain truck market overview, 2nd quarter 2004

Region/commodity*	25 miles	100 miles	200 miles	Truck availability	Truck activity	Future truck activity
				Rating compared to same quarter last year		
	Rate per mile			1=Very easy to 5=Very difficult	1=Much lower to 5=Much higher	
National average[1]	**2.99**	**1.98**	**1.73**	**2.2**	**3.1**	**3.2**
North Central region[2]	2.51	1.79	1.54	2.2	3.1	3.2
Corn	2.68	2.08	1.75	2.3	3.5	3.3
Wheat	2.18	1.53	1.36	2.0	2.9	3.0
Soybean	2.68	2.08	1.75	2.3	3.3	3.3
South Central region[2]	2.95	1.87	1.75	2.3	3.0	3.3
Corn	2.95	1.87	1.75	2.3	3.0	3.3
Wheat	1.20	1.10	1.00	2.0	3.0	3.0
Soybean	3.83	2.25	2.13	2.3	3.0	3.5

Rates are based on trucks with 80,000 lb weight limit
*Commodity averages based on truck rates for top producing states based on National Agricultural Statistics Service/USDA
[1]National average includes: AR, CO, IA, IL, IN, KS, LA, MN, MS, ND, NE, OH, OK, OR, SD, TX, and WA.
[2]Commodity rates per mile include the average of the top 3 producing states within the region.
Source: Transportation and Marketing Programs/AMS/USDA

The weekly **diesel price** provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant expense for truck grain movements, accounting for 37 percent of the estimated variable cost.

Table 12--Retail on-highway diesel prices*, week ending 08/09/04 (US$/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	1.803	0.038	0.321
	New England	1.889	0.032	0.318
	Central Atlantic	1.891	0.035	0.318
	Lower Atlantic	1.758	0.041	0.324
II	Midwest	1.781	0.043	0.307
III	Gulf Coast	1.756	0.034	0.309
IV	Rocky Mountain	1.849	0.026	0.344
V	West Coast	2.030	-0.006	0.382
	California	2.113	-0.002	0.398
Total	U.S.	1.814	0.034	0.322

*Diesel fuel prices include all taxes.

Source: Energy Information Administration/U.S. Department of Energy (www.eia.doe.gov)

Grain Exports

Table 13--U.S. export balances (1,000 metric tons)

	Wheat						Corn	Soybeans	Total
Week ending 1/	HRW	SRW	HRS	SWW	DUR	All wheat			
7/29/2004	1,617	1,329	1,474	1,054	93	5,567	5,170	536	11,273
This week year ago	1,930	404	1,292	504	149	4,279	3,851	1,568	9,698
Cumulative exports-crop year 2/									
2003/04 YTD	1,855	616	1,147	539	127	4,283	44,040	23,839	72,162
2002/03 YTD	1,701	575	840	564	146	3,825	36,739	28,161	68,725
2003/04 as % of 2002/03	109	107	137	96	87	112	120	85	105
2002/03 Total	6,896	2,899	6,645	3,517	720	20,677	39,646	28,908	89,231
2001/02 Total	8,704	5,485	5,554	3,127	1,133	24,003	47,460	29,838	101,301

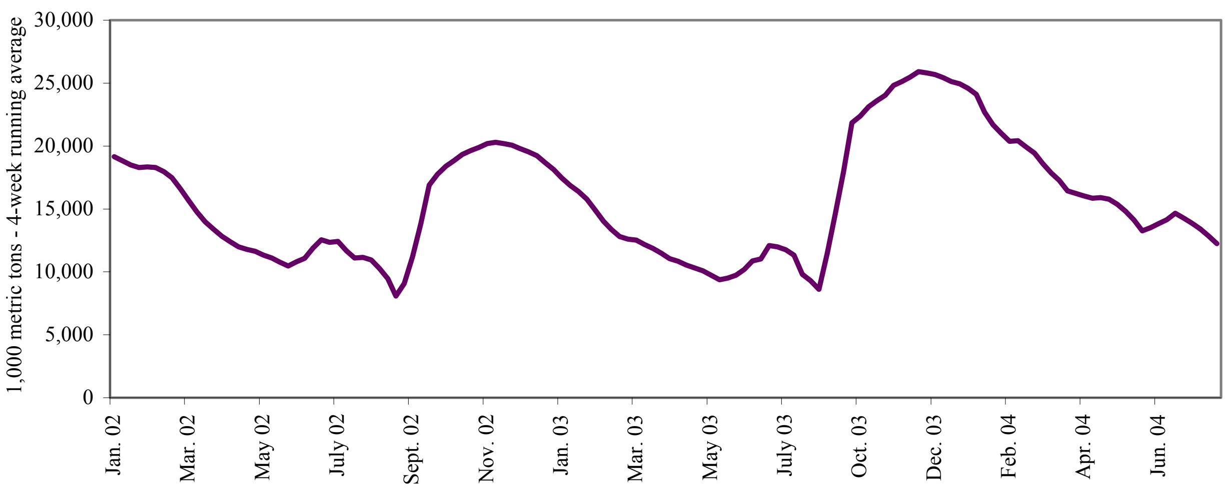
Note: YTD = year-to-date. Crop year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31, 1/ = Current outstanding unshipped export sales to date

2/ = New crop year in effect for wheat sales

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

Figure 9

U.S. grain, unshipped export balances (wheat, corn, and soybean sales)



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

Table 14--Select U.S. port regions - grain inspections for export (1,000 metric tons)

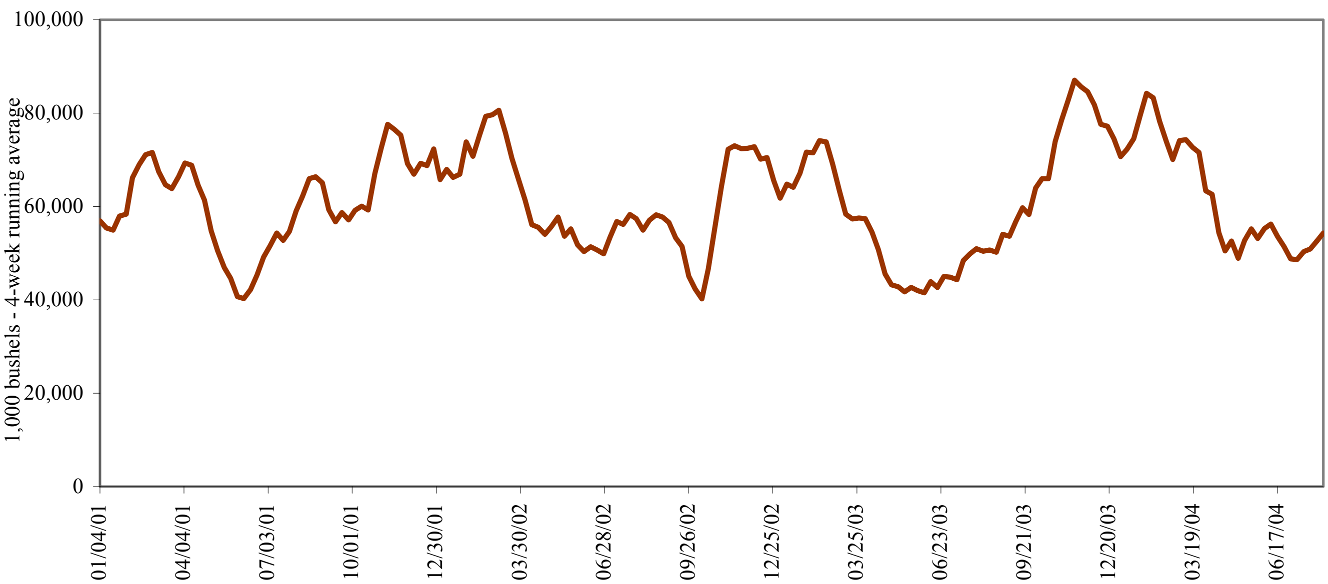
	Pacific Region			Mississippi Gulf			Texas Gulf			Port Region total		
Week ending	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Pacific	Mississippi	Texas
08/05/04	335	204	0	162	664	21	165	0	0	539	847	165
2004 YTD	6,861	6,944	1,929	4,450	19,382	6,338	5,704	51	14	15,734	30,170	5,770
2003 YTD	4,892	3,051	2,722	3,065	17,688	10,659	3,166	12	23	10,666	31,412	3,200
2004 as % of 2003	140	228	71	145	110	59	180	424	62	148	96	180
2003 Total	8,764	5,450	5,141	5,883	30,903	19,374	7,011	229	69	19,355	56,160	7,309

Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa); YTD: year-to-date

The United States exports approximately one-quarter of the grain it produces. On average, it 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. Over 60 percent of these U.S. export grain shipments departed through the Mississippi Gulf region in 2003.

Figure 10

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



Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa)

Ocean Transportation

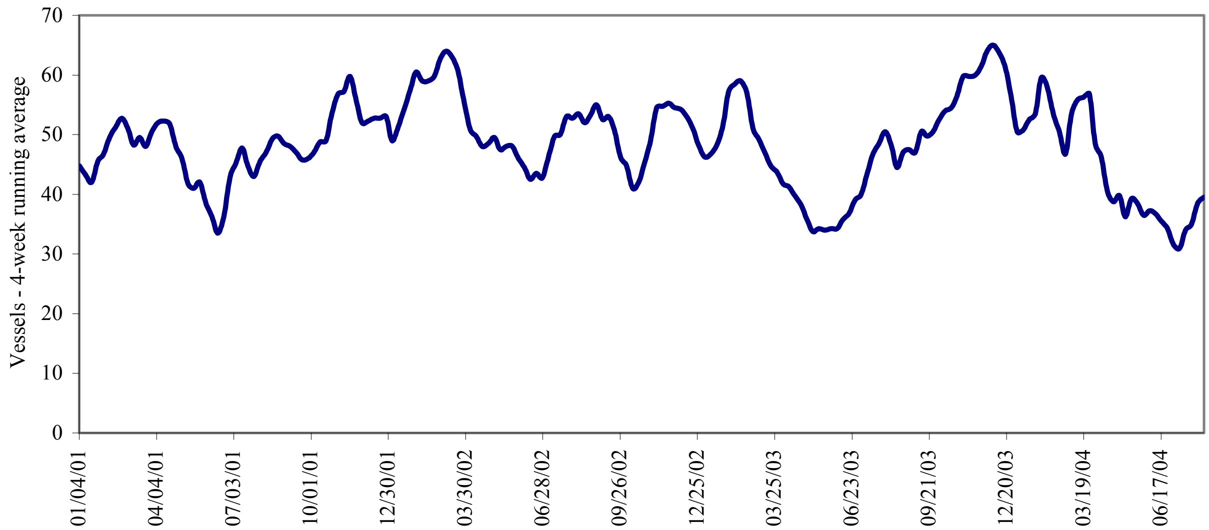
Table 15--Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
8/5/2004	16	40	50	6	4
7/29/2004	16	39	48	12	2
2003 range	(11..47)	(30..76)	(39..93)	(3..13)	(1..15)
2003 avg.	31	49	62	9	6

Source: Transportation & Marketing Programs/AMS/USDA

Figure 11

Gulf Port grain vessel loading (past 7 days)



Source: Transportation & Marketing Programs/AMS/USDA

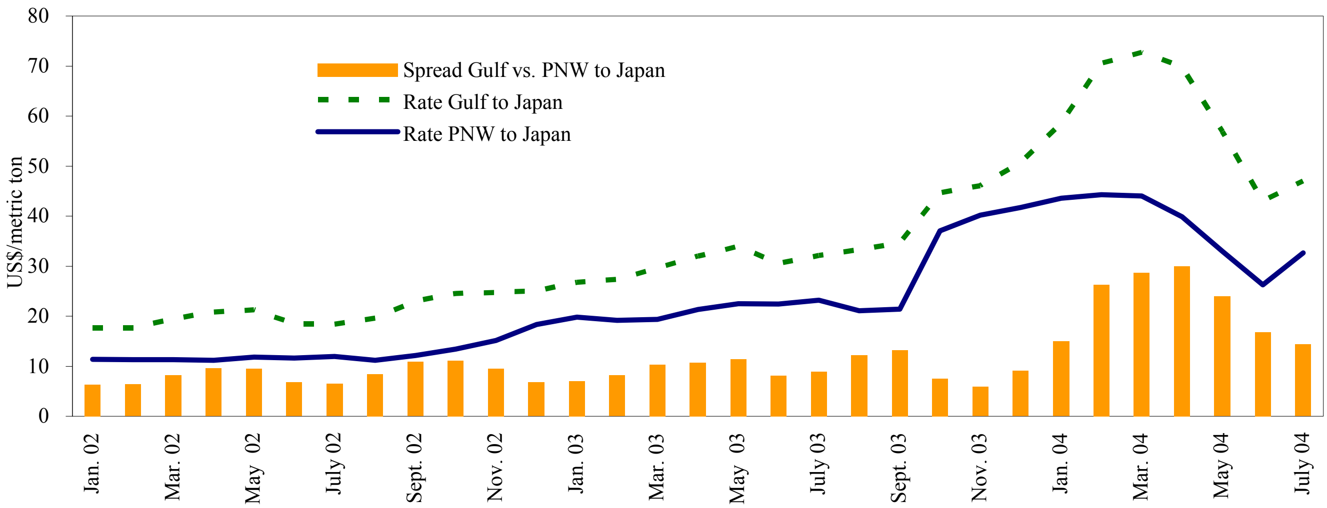
Table 16--Quarterly ocean freight rates (average rates & percentage changes) (US$/metric ton)

Countries/ regions	2004 2nd qtr	2003 2nd qtr	Percent change	Countries/ regions	2004 2nd qtr	2003 2nd qtr	Percent change
Gulf to				**Pacific NW to**			
Japan	$37.00	$31.53	17	Japan	---	$19.43	---
N. Europe	---	$18.98	---	**Argentina/Brazil to**			
N. Africa	$35.33	$21.75	62	Med. Sea	---	$24.50	---
Med. Sea	---	$14.50	---	China	---	$32.50	---

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

Figure 12

Grain vessel rates, U.S. to Japan



Source: Baltic Exchange (www.balticexchange.com)

Table 17--Ocean freight rates for selected shipments, week ending 08/07/04

Export region	Import region	Grain	Month	Volume loads (metric tons)	Freight rate ($/metric ton)
U.S. Gulf	Poti, Georgia*	Wheat	Jul15/26	43,000	57.47
U.S. Gulf	Japan	Hvy grain	Aug 1/5	54,000	50.00
U.S. Gulf	Japan	Hvy grain	Jul 28/31	54,000	46.50
Australia	Bangladesh	Wheat	Jul 10/20	30,000	39.00
France	Algeria	Hvy grain	Aug 6/10	22,000	25.50
River Plate	Pakistan	Hvy grain	Aug 9/10	25,000	58.00

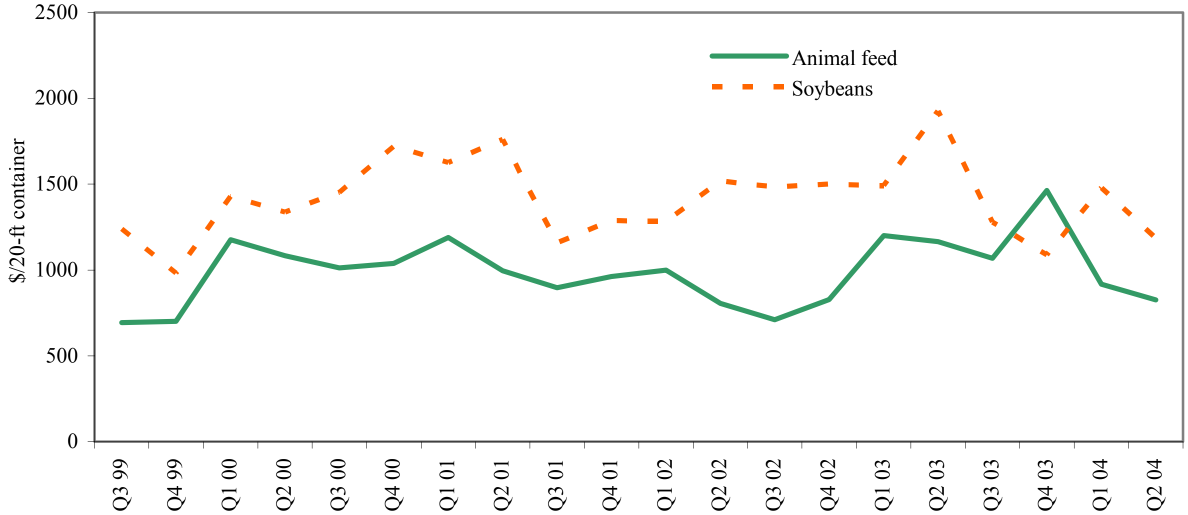
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

*Most food aid from the United States is required to be shipped on U.S. flag vessels. The vessels are limited in availability resulting in higher rates. In addition, destinations receiving food aid generally lack adequate port unloading facilities, requiring the vessel to remain in port for a longer duration than normal.

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

Figure 13

Weighted average rates[1] for containerized shipments of animal feed and soybeans to selected Asian countries



[1]Animal Feed: Busan-Korea (14%), Kaohsiung-Taiwan (28%), Tokyo-Japan (36%), Hong Kong (19%), Bangkok-Thailand (3%) and soybeans: Busan-Korea (5%), Keelung-Taiwan (35%), Tokyo-Japan (61%)

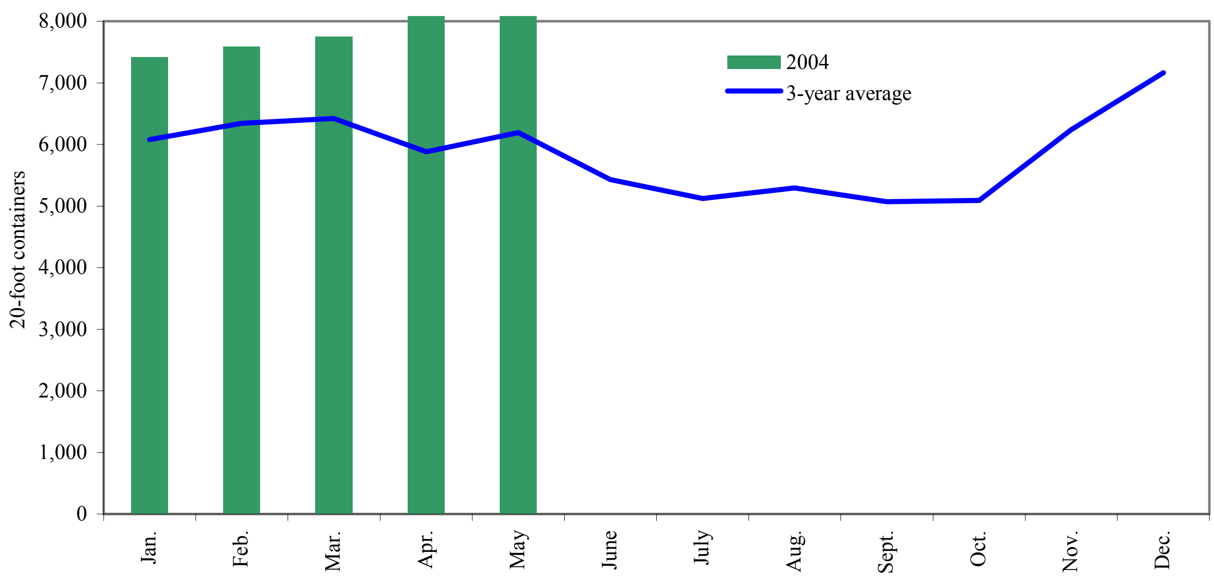
Quarter 2, 2004.

Source: Ocean Rate Bulletin, Transportation & Marketing Programs/AMS/USDA

Container ocean freight rates – average rate per twenty-foot equivalent unit (TEU) weighted by shipping line market share and trade route.

Figure 14

Monthly shipments of containerized grain for 2004 compared with a 3-year average



Note: PIERS data is available with a lag of approximately 40 days

Source: Port Import Export Reporting Service (PIERS), *Journal of Commerce*

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Related Websites

Agricultural Container Indicators	http://www.ams.usda.gov/tmd2/agci/
Ocean Rate Bulletin	http://www.ams.usda.gov/tmd/Ocean/index.asp