Grain Transportation Report

A weekly publication of the
Transportation and Marketing Programs/Transportation Services Branch
www.ams.usda.gov/tmdtsb/grain

Sept. 9, 2004

Contents

The next release is Sept. 16, '04

The GTR: Where Do We Get our Data?

Bulk Grain Ocean Freight Rate Data Sources. Bulk grain ocean freight rates represent the cost to ship bulk grain from one country to another. In general, ocean freight rates are quoted in dollars per metric ton of grain shipped. The two major sources of ocean freight rate data that we report are the Baltic Exchange in London and Maritime Research, Inc., in New York. Although data on grain shipments published by the Baltic Exchange and Maritime Research are generally similar, actual numbers may vary slightly due to the companies' reporting methods. The Grain Transportation Report uses data from both sources: Maritime Research data for Tables 15 and 16 and Baltic Exchange data for Figure 12.

Maritime Research, Inc.: Maritime Research gathers primary data directly from brokers, shippers, and ship owners, as well as from independent reporters in London and Singapore. Many of these sources have provided data to Maritime Research for more than 50 years.

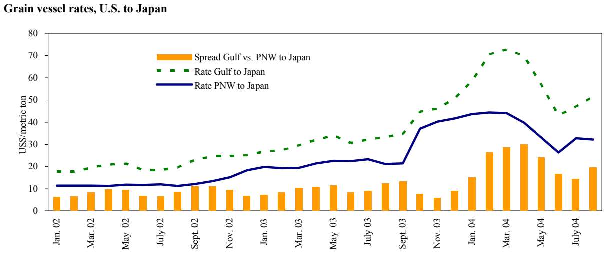
Data gathered by the Maritime Research is reported by individual fixture (a fixture describes the basic terms of a contract, including origin and destination, and other features) or rate and grouped by commodity; i.e., grains, ore, coal, etc. Each week Maritime Research reports hundreds of fixtures, including 10 to 30 grain fixtures from the United States and other producing countries to markets around the world. The *Grain Transportation Report* uses individual fixtures in Table 16 to show a sample of rates for different grains between a number of origins and destinations. Maritime Research also reports dry bulk vessel daily charter rates. Many large shippers charter or lease vessels for up to a year to make regular deliveries of a commodity.

Both single fixture and daily charter rates are used to construct indices to show trends in the industry. Maritime Research refrains from any analysis in their weekly report to avoid influencing the market, which makes the information useful in arbitration and court cases. Maritime Research's weekly report is targeted to shippers, ship owners, ship brokers, ports, and other market participants.

The Baltic Exchange: The Baltic Exchange estimates a daily fixture for a large number of commodities over many different ocean trade routes. The Baltic Exchange's experienced shipbrokers collect market data from a number of key brokerage firms located throughout the world. If no data is available for a commodity on a route, estimates are made by an independent panel of international ocean freight specialists. This information is published daily to provide consistent market data for carriers and shippers. The indices are also used as a basis for a forward market the Baltic Exchange established for its members. The Baltic Exchange publishes four daily indices for dry bulk vessels which carry grain, coal, ore, fertilizer, steel, and other bulk commodities. They include:

1. Dry bulk Handymax vessels (30,001 to 50,000-ton capacity)
2. Dry bulk Panamax vessels (50,001 to 80,000-ton capacity)
3. Dry bulk Capesize vessels (80,001 and larger)
4. Dry Index (a composite of all three dry bulk vessel sizes above)

Grain vessel rates, U.S. to Japan



Source: Baltic Exchange (www.balticexchange.com)

As grain is most commonly shipped on Panamax vessels, the Panamax index is a good measure of current and future market conditions for grain shippers. The Baltic's Panamax index reports daily grain rates on three routes: U.S. Gulf to Rotterdam, U.S. Gulf to Japan, and U.S. Pacific Northwest (PNW) to Japan. The index also reports Panamax rates for a number of other dry bulk commodities on other routes. The *Grain Transportation Report* uses the data from the Gulf to Japan, and PNW to Japan to construct the figure shown above (figure 12, page 14 of the report). [*Heather.Fultz@usda.gov*]

Grain Transportation Indicators

Table 1--Grain transport cost indicators*

Week ending	Truck	Rail	Barge	Ocean: Gulf	Ocean: Pacific
09/08/04	125	95	127	232	227
Compared with last week	↓	↓	↑	↓	**unchanged**

*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)

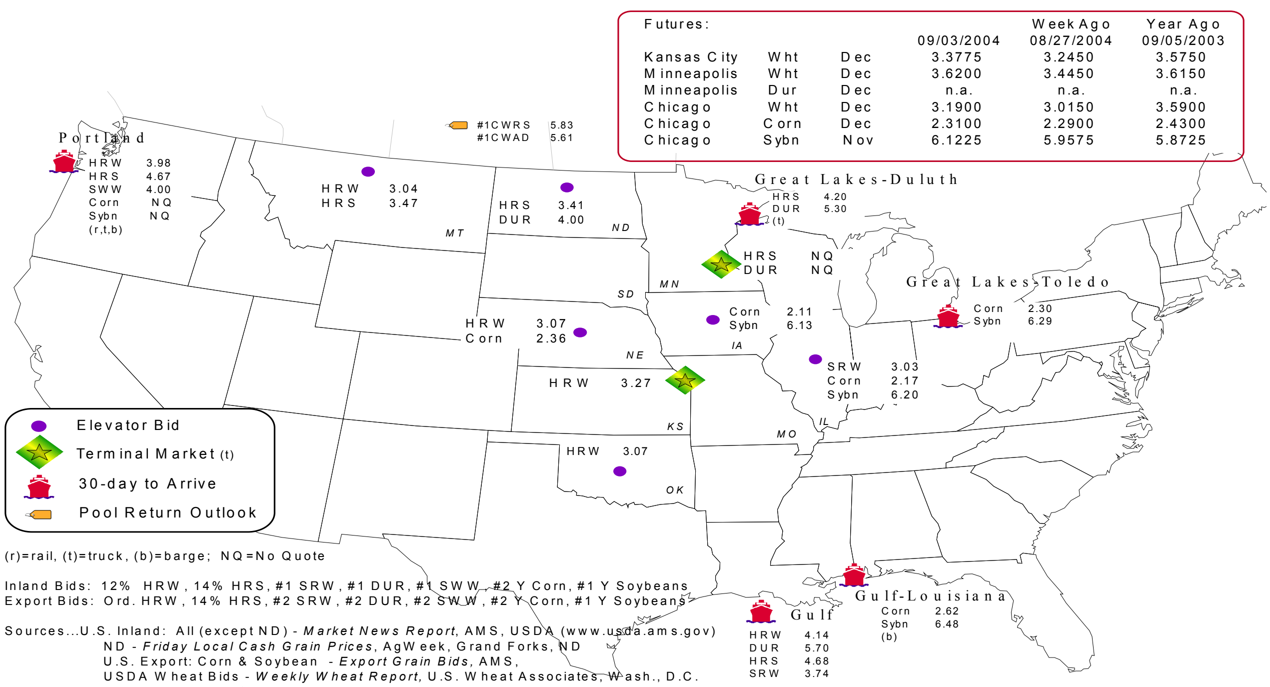
Commodity	Origin--destination	9/3/2004	8/27/2004
Corn	IL--Gulf	-0.45	-0.41
Corn	NE--Gulf	-0.26	-0.36
Soybean	IA--Gulf	-0.35	-0.40
HRW	KS--Gulf	-0.87	-0.77
HRS	ND--Portland	-1.26	-1.17

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

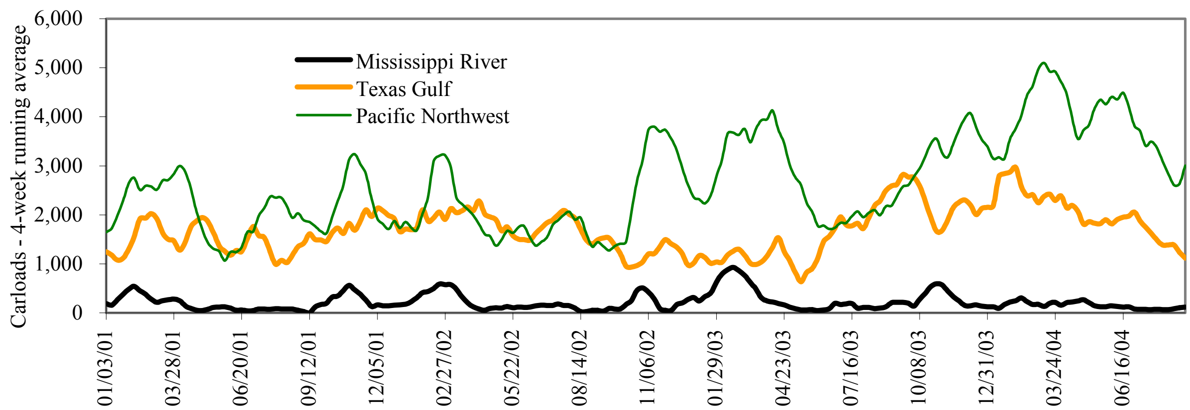
Table 3--Rail deliveries to port (carloads)*

Week ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total
9/01/2004 [p]	92	909	3,869	28	4,898
8/25/2004 [r]	121	920	3,071	32	4,144
2004 YTD	5,347	69,350	136,650	4,912	216,259
2003 YTD	10,036	50,159	93,533	12,000	165,728
2004 as % of 2003	53	138	146	41	130
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

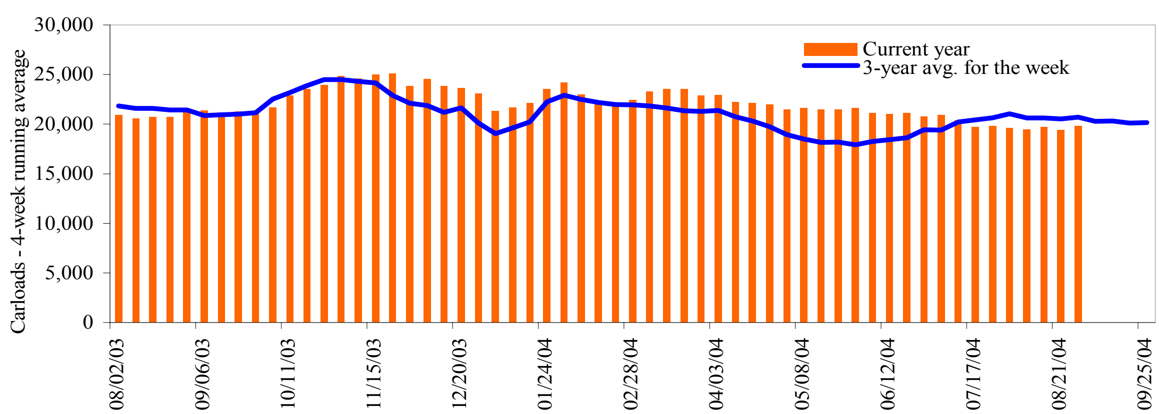
Railroads originate approximately 40 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

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
08/28/04	2,137	3,043	8,928	587	5,700	20,395	4,332	3,676
This week last year	2,242	3,071	8,908	560	7,501	22,282	4,324	4,095
2004 YTD	94,249	109,844	293,694	16,585	219,915	734,287	159,251	133,592
2003 YTD	92,576	109,895	248,693	13,219	217,160	681,543	117,475	122,953
2004 as % of 2003	102	100	118	125	101	108	136	109
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 09/04/04 ($/car)*

Delivery for:	Oct. 04	Nov. 04	Dec. 04
BNSF[1]			
COT/N. grain	no bid	no bid	no bid
COT/S. grain	$4	no bid	$4
UP[2]			
GCAS/Region 1	no bid	no bid	no bid
GCAS/Region 2	$1	$1	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.

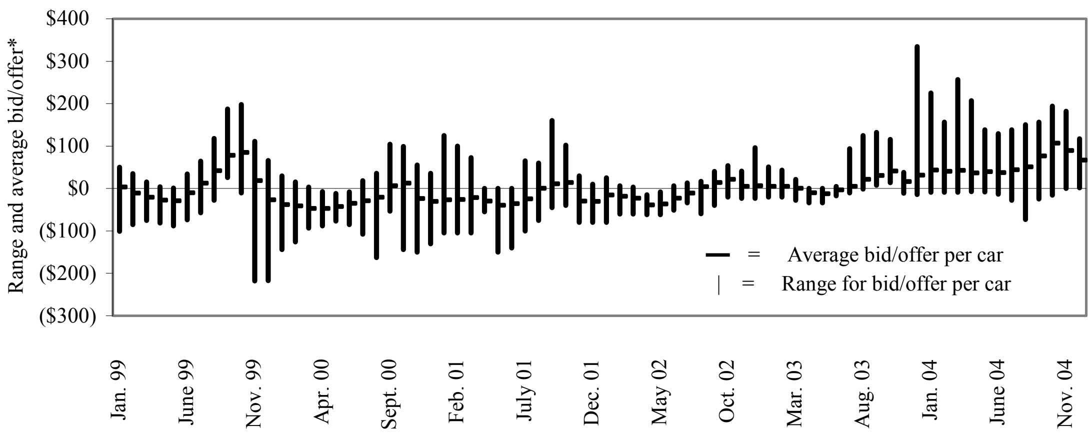
Source: Transportation & Marketing Programs/AMS/USDA

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 09/03/04 ($/car)*

	Delivery period			
	Oct. 04	**Nov. 04**	**Dec. 04**	**Jan. 05**
BNSF-GF	-$16	$0	$2	n/a
Change from last week	-$49	-$25	-$23	n/a
UP-Pool	$16	$28	$15	n/a
Change from last week	-$12	$1	-$5	n/a

*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: 9/7/2004	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

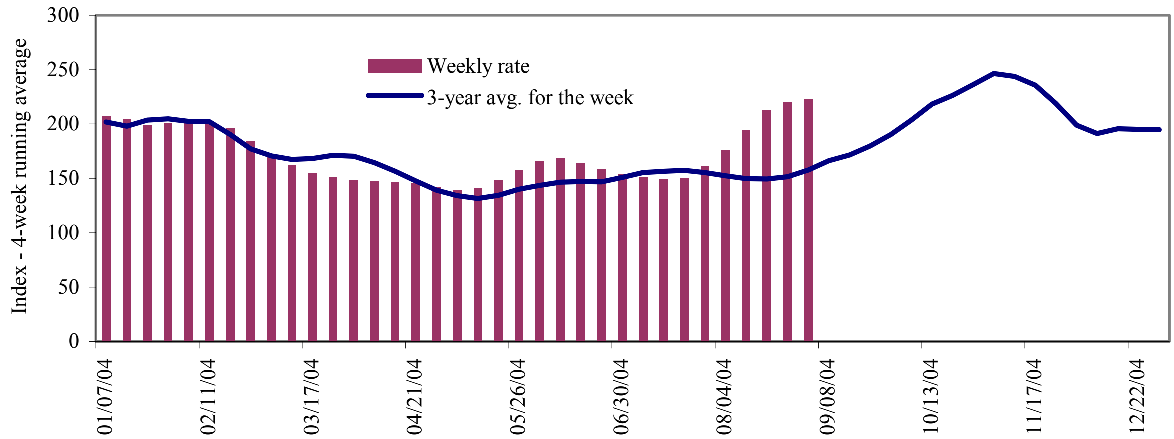
*A unit train refers to shipments of at least 52 cars. Shuttle train rates are available for qualified shipments of more than 100 cars that meet railroad efficiency requirements.

**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

Barge Transportation

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	9/1/2004	8/25/2004	Oct '04	Dec '04
Twin Cities	230	229	301	0
Mid-Mississippi	224	225	297	0
Illinois River	221	224	293	199
St. Louis	212	208	270	158
Lower Ohio	239	231	293	167
Cairo-Memphis	217	201	266	150

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, La Grange Lock & Dam (L&D 8).

Figure 6
Benchmark tariff rates

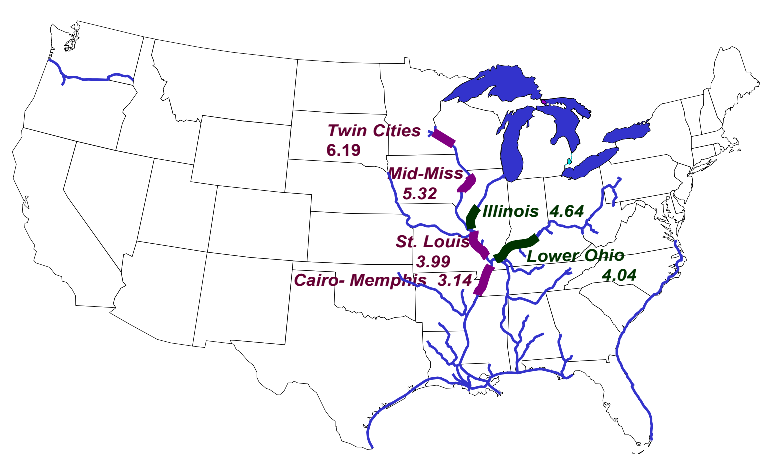
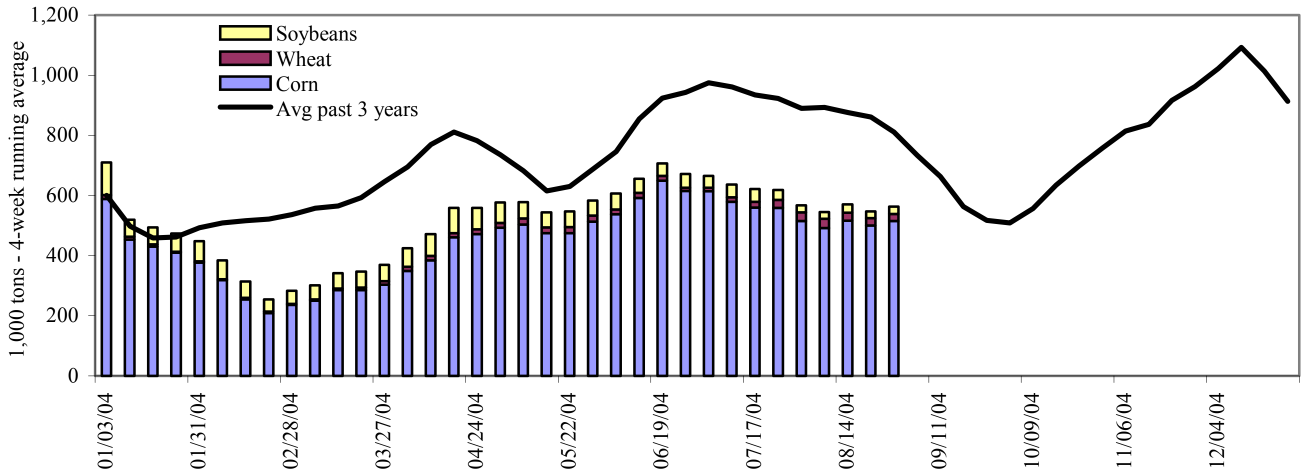


Figure 7

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



Source: Transportation & Marketing Programs/AMS/USDA

Table 9--Barge grain movements (1,000 tons)

Week ending 08/28/04	Corn	Wheat	Soybean	Other	Total
Mississippi River					
Rock Island, IL (L15)	222	8	12	0	242
Winfield, MO (L25)	267	15	8	22	311
Alton, IL (L26)	462	23	9	22	516
Granite City, IL (L27)	475	20	9	26	531
Illinois River (L8)	75	5	2	0	81
Ohio River (L52)	14	27	0	5	46
Arkansas River (L1)	0	38	0	4	42
2004 YTD	17,689	2,016	2,844	484	23,033
2003 YTD	19,906	1,781	5,457	554	27,699
2004 as % of 2003 YTD	89	113	52	87	83
Total 2003	29,898	2,787	9,146	695	42,526

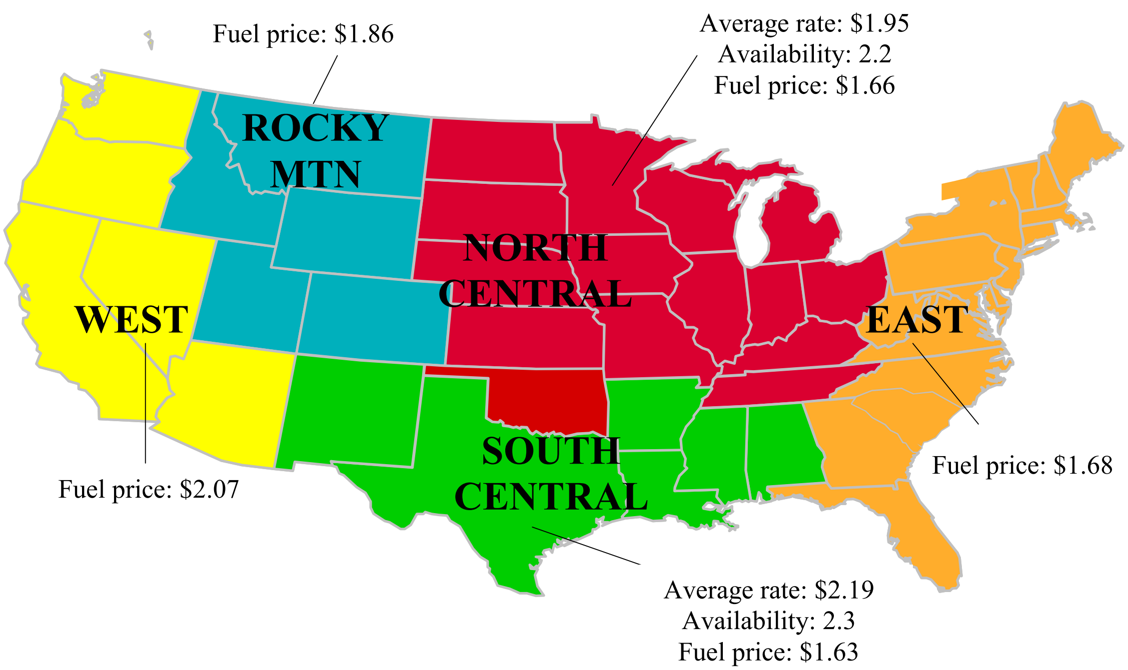
YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1. "Other" refers to oats, barley, sorghum, and rye.

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 10--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	n/a	n/a	n/a	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 11--Retail on-highway diesel prices*, week ending 09/06/04 (US$/gallon)

			Change from	
Region	**Location**	**Price**	**Week ago**	**Year ago**
I	East Coast	1.858	0.000	0.386
	New England	1.949	-0.007	0.378
	Central Atlantic	1.933	-0.004	0.355
	Lower Atlantic	1.818	0.003	0.401
II	Midwest	1.845	0.001	0.373
III	Gulf Coast	1.819	-0.005	0.387
IV	Rocky Mountain	1.918	0.003	0.364
V	West Coast	2.038	-0.013	0.397
	California	2.136	-0.012	0.444
Total	U.S.	1.869	-0.002	0.381

*Diesel fuel prices include all taxes.

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

Grain Exports

Table 12--U.S. export balances (1,000 metric tons)

	Wheat						Corn	Soybeans	Total
Week ending 1/	HRW	SRW	HRS	SWW	DUR	All wheat			
8/26/2004	1,813	1,067	1,575	1,224	110	5,787	2,177	310	8,274
This week year ago	2,375	565	1,324	655	166	5,085	1,900	599	7,584
Cumulative exports-crop year 2/									
2003/04 YTD	2,578	1,053	1,798	961	149	6,539	47,704	24,108	78,351
2002/03 YTD	2,836	952	1,492	844	232	6,355	39,646	28,908	74,909
2003/04 as % of 2002/03	91	111	121	114	64	103	120	83	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

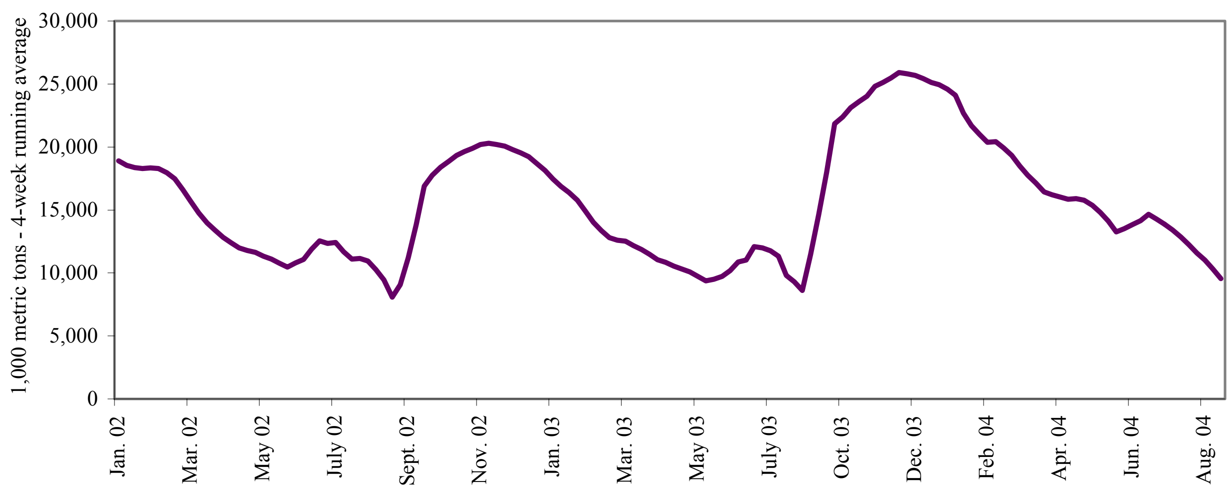
Note: YTD = year-to-date. Crop year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31, 1/ = Current outstanding unshipped export sales to date

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

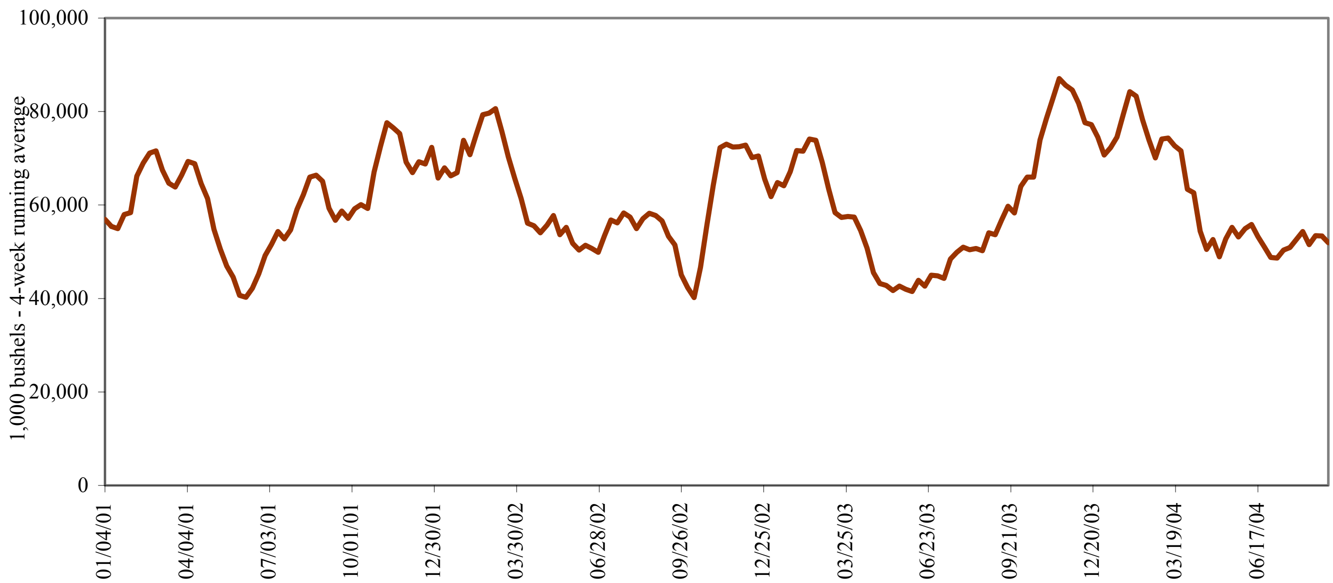
	Pacific Region			Mississippi Gulf			Texas Gulf			Port Region total		
Week ending	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Pacific	Mississippi	Texas
09/02/04	326	216	0	251	474	0	141	0	0	542	725	141
2004 YTD	7,941	7,631	1,934	5,206	21,735	6,489	6,108	51	14	17,505	33,430	6,174
2003 YTD	5,701	3,581	2,779	3,797	19,776	11,182	4,070	19	23	12,062	34,756	4,112
2004 as % of 2003	139	213	70	137	110	58	150	267	62	145	96	150
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

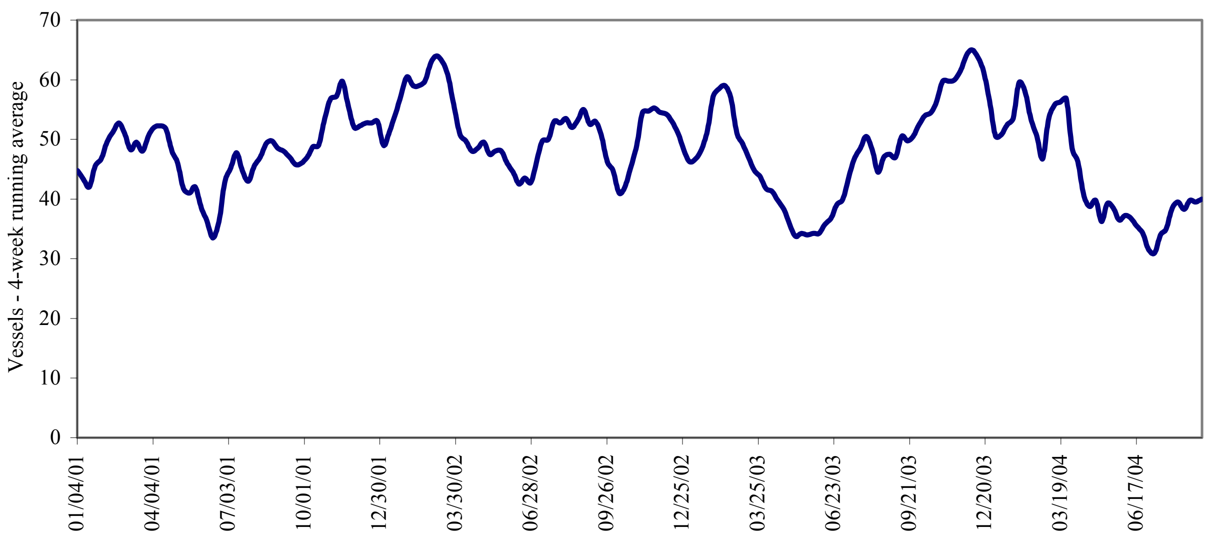
Table 14--Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
9/2/2004	15	42	53	10	3
8/26/2004	21	38	41	9	5
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

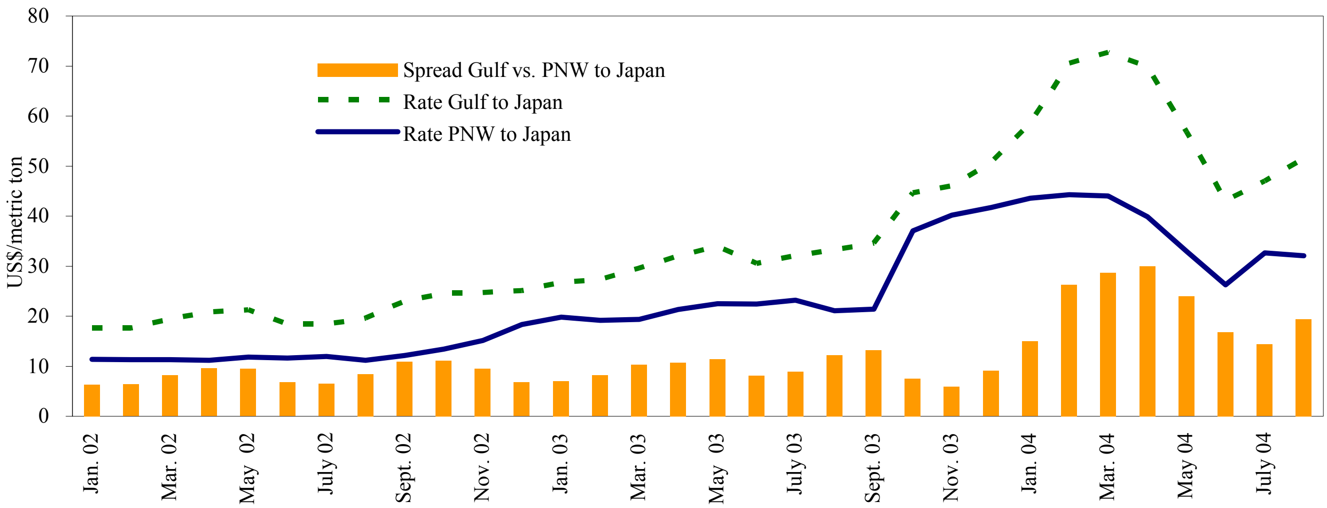
Table 15--Quarterly ocean freight rates (average rates & percentage changes) (US$/metric ton)

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)

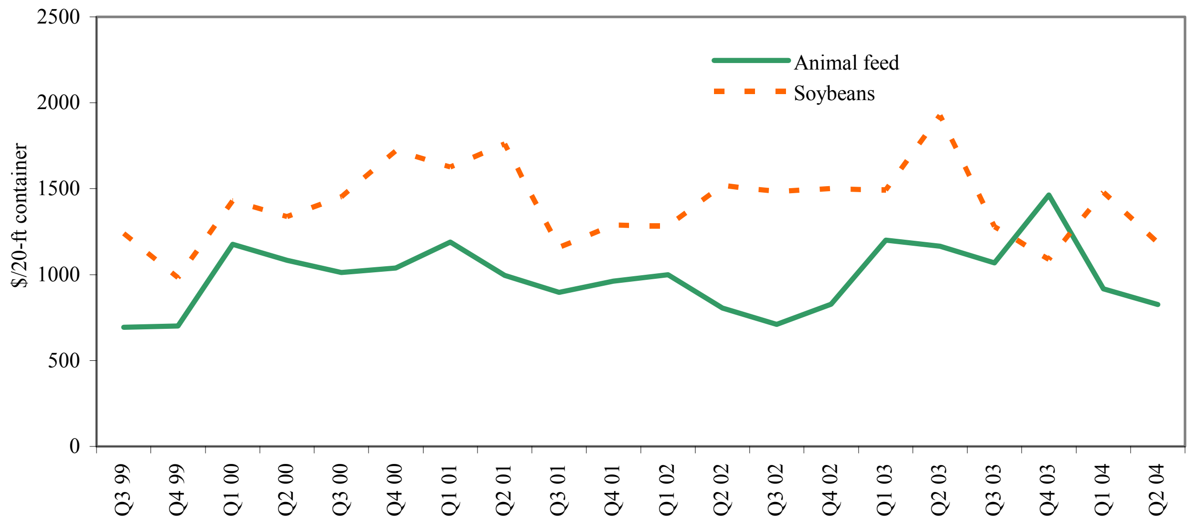
Table 16--Ocean freight rates for selected shipments, week ending 09/04/04

Export region	Import region	Grain	Month	Volume loads (metric tons)	Freight rate ($/metric ton)
U.S. Gulf	El Salvador*	Soybean Meal	Sept 1/15	4,000	75.75
U.S. Gulf	Republic of Benin*	Rice bggd	Sept 25/30	2,090	185.00
U.S. Gulf	Japan	Hvy grain	Aug 1/5	54,000	50.00
U.S. Gulf	Japan	Hvy grain	Oct 1/5	54,000	53.75
PNW	Russia*	Wheat	Oct 4/14	25,000	77.01
PNW	Eritrea*	Wheat	Sept 1/10	22,700	69.10
River Plate	Italy	Soybean meal	Aug 20/26	25,000	45.50

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 (60%)

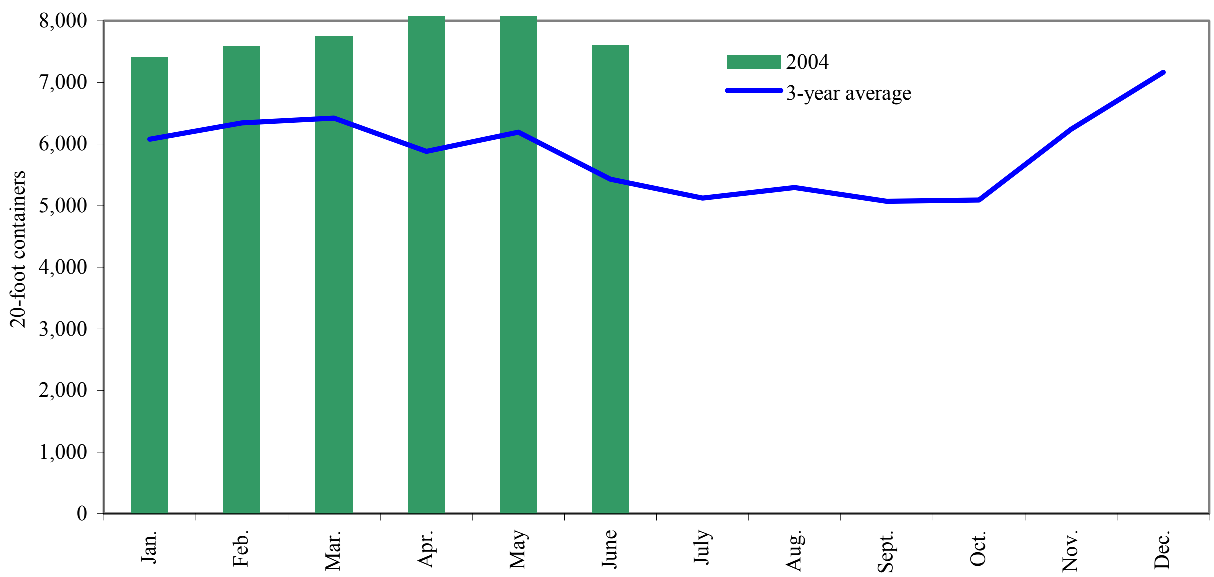
Quarter 2, 2004.

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