Grain Transportation Report

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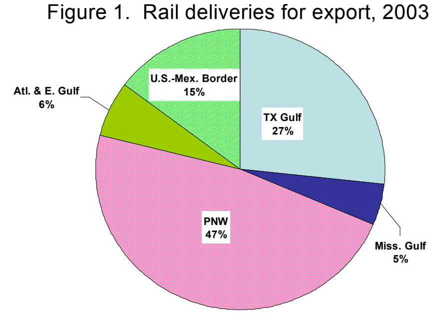
Subscription Information

The next release is Oct. 14, '04

Mexico Has Become a Leading Importer of U.S. Grain. Mexico imported 16.8 million tons of U.S. grains and feeds during 2003, compared with only 9.18 million tons in 1994, an 83 percent increase. During 2003, Mexico ranked 2nd in the import of U.S. feed grains, 2nd in the import of U.S. soybeans, and 3rd in the import of U.S. wheat. Cross-border rail deliveries to Mexico during 2003 accounted for 15 percent of all U.S. rail deliveries to ports and export destinations, more than the Mississippi Gulf and Atlantic and East Gulf ports together (Figure 1).

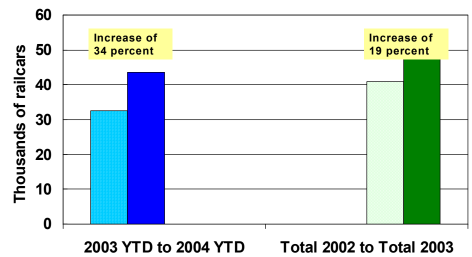
Figure 1. Rail deliveries for export, 2003



Source: USDA, Transportation & Marketing Programs

As a result of increased trade following implementation of NAFTA, the U.S. and Mexican economies are becoming more integrated. Improved rail infrastructure, increased Mexican-U.S. rail company partnerships, competitive transport rates and liberalized trade between Mexico and the United States could increase cross-border rail movements even further in the future.

Figure 2. Increased rail deliveries to Mexico



Source: USDA, Transportation & Marketing Programs

Railroads Transport a Large Proportion of U.S.-grown Grain to Mexico. Recent cross-border railroad data indicates that 2004 year-to-date total U.S.-to-Mexico grain movements have increased 34 percent to 43,533 railcars, compared with 32,527 railcars for the same period in 2003. Total 2003 U.S. grain movements to Mexico also increased relative to 2002 -- 19 percent higher, with 48,805 railcars -- compared with 40,867 in 2002 (Figure 2 and Table 3 in the report). Karl.Hacker@USDA.gov ; Marvin.Prater@USDA.gov

New Report From Transportation & Marketing – ***Transportation of U.S. Grains A Modal Share Analysis, 1978-2000***. USDA recently released an updated version of a 1998 report, discussing changes in the competitiveness and relative efficiencies among rail, barge and truck, the major modes for grain movements. *The Transportation of U.S. Grains: A Modal Share Analysis,1978-2000*, provides a framework to assess public policies that affect the development and success of the Nation's transportation infrastructure. The amount of grain moved in the United States increased significantly from 1978 to 2000. During this period, significant changes occurred in the types of grain moved and the amount shipped to domestic and export markets.

Significant changes in modal share occurred during 1978-2000, particularly between rail and truck modes. All modes showed an increase in absolute tons moved. However, rail and barge shares decreased, while truck share increased through 2000, making truck the predominant mode of grain transport in the United States. Barges, railroads, and trucks often compete head-to-head as suppliers of transportation for grain movements. Despite a high degree of competition in some markets, these modes also complement each other. Before a bushel of grain reaches the market, it has often been transported by two or more modes. This balance between competition and integration provides grain shippers with a highly efficient, low-cost system of transportation that results in lower shipping costs, smaller marketing margins, and more competitive export prices.

Copies of the report are available only on the internet at www.ams.usda.gov/tmd/tsb/Modal_Share.pdf. For information or comments on the report, contact Nick.Marathon@usda.gov.

Grain Transportation Indicators

Table 1--Grain transport cost indicators*

	Truck	Rail	Barge	Ocean	
Week ending				Gulf	Pacific
10/06/04	138	227	233	240	250
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)

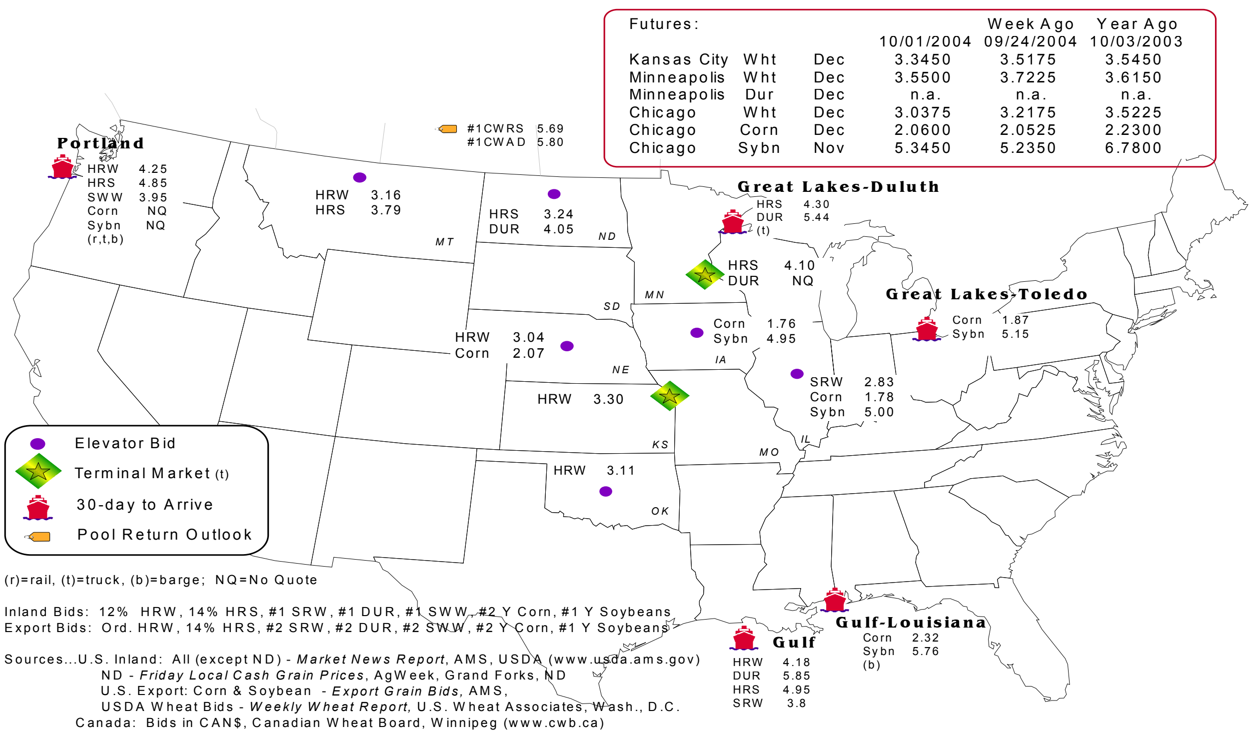
Commodity	Origin--destination	10/1/2004	9/24/2004
Corn	IL--Gulf	-0.54	-0.52
Corn	NE--Gulf	-0.25	-0.25
Soybean	IA--Gulf	-0.81	-0.80
HRW	KS--Gulf	-0.88	-0.87
HRS	ND--Portland	-1.61	-1.74

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	Cross-Border Mexico	Pacific Northwest	Atlantic & East Gulf	Total
9/29/2004 p	154	1,047	1,468	3,169	170	6,008
9/22/2004 r	193	831	1,877	2,654	22	5,577
2004 YTD	6,044	74,377	43,533	148,505	5,310	277,769
2003 YTD	10,759	61,317	32,527	104,875	12,177	221,655
2004 as % of 2003	56	121	134	142	44	125
Total 2003**	14,843	88,194	48,805	157,125	20,509	329,476
Total 2002	12,247	83,945	40,867	110,471	20,938	268,468

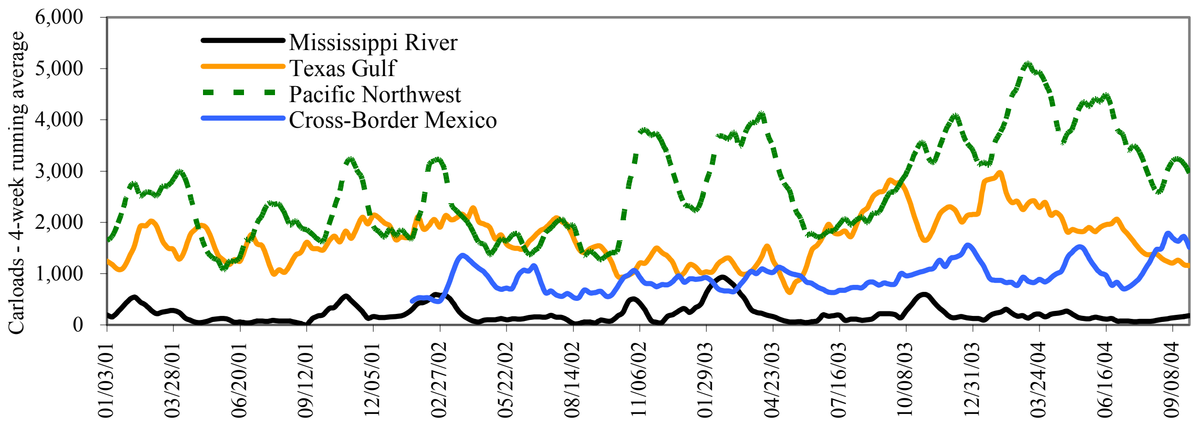
(*) Incomplete Data, as of 9/22/04, Cross-Border movements included; (**) Excludes 53rd week;YTD = year-to-date; p = preliminary data; r = revised data

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

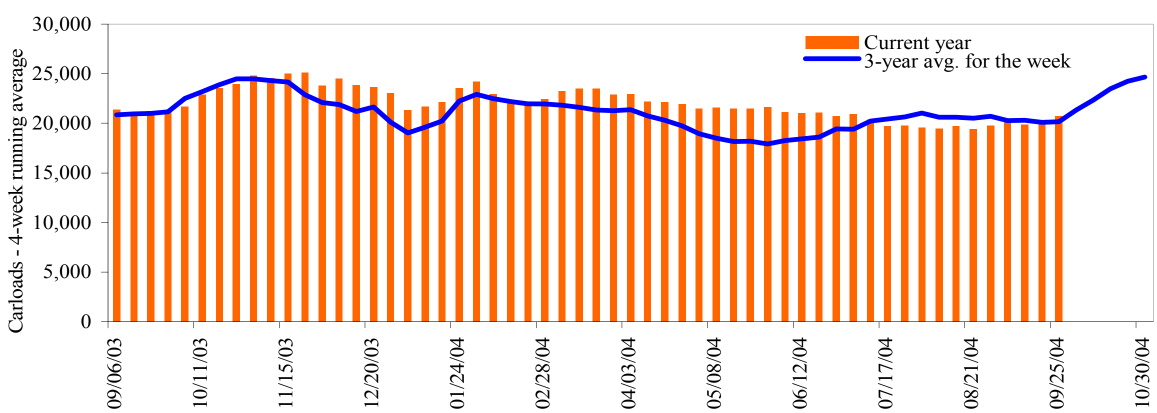
Rail deliveries to port



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
09/25/04	2,574	3,199	9,111	851	6,390	22,125	3,347	3,625
This week last year	2,329	2,448	9,929	573	7,117	22,396	4,418	4,650
2004 YTD	102,914	121,889	328,633	19,197	244,596	817,229	171,612	148,146
2003 YTD	101,257	120,474	285,531	15,663	243,750	766,675	133,569	139,087
2004 as % of 2003	102	101	115	123	100	107	128	107
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 10/2/04 ($/car)*

Delivery for:	Nov. 04	Dec. 04	Jan. 05
BNSF[1]			
COT/N. grain	$111	$81	$57
COT/S. grain	$168	$145	$111
UP[2]			
GCAS/Region 1	no offer	$33	no offer
GCAS/Region 2	no offer	$77	no offer

*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.

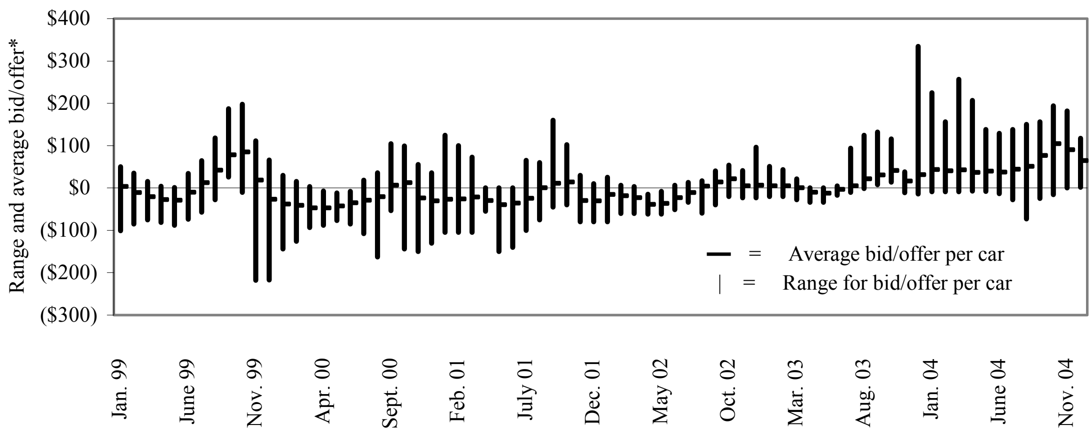
Source: Transportation & Marketing Programs/AMS/USDA

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 10/1/04 ($/car)*

	Delivery period			
	Nov. 04	**Dec. 04**	**Jan. 05**	**Feb. 05**
BNSF-GF	$138	$79	no offer	no offer
Change from last week	$18	$18	no offer	no offer
UP-Pool	$125	$81	no offer	no offer
Change from last week	$28	$6	no offer	no offer

*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: 10/4/2004	**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	$2,002	$22.07	$0.60
Corn	Minneapolis, MN	Portland, OR	$3,600	$39.68	$1.01
	Chicago, IL	Baton Rouge, LA	$2,736	$30.16	$0.77
	Council Bluffs, IA	Baton Rouge, LA	$2,270	$25.02	$0.64
	Evansville, IN	Raleigh, NC	$1,791	$19.74	$0.50
	Council Bluffs, IA	Stockton, CA	$3,606	$39.75	$1.01
	Kansas City, MO	Dalhart, TX	$1,965	$21.66	$0.55
	Columbus, OH	Raleigh, NC	$1,700	$18.74	$0.48
	Des Moines, IA	Laredo, TX	$2,930	$32.30	$0.82
Soybeans	Minneapolis, MN	Portland, OR	$3,610	$39.79	$1.08
	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	$1,791	$19.74	$0.54
	Chicago, IL	Raleigh, NC	$2,391	$26.36	$0.72
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	$2,665	$29.38	$0.75
	Minneapolis, MN	Portland, OR	$3,450	$38.03	$0.97
Soybeans	Council Bluffs, IA	Houston, TX	$2,605	$28.71	$0.73
	Minneapolis, MN	Portland, OR	$3,410	$37.59	$0.95

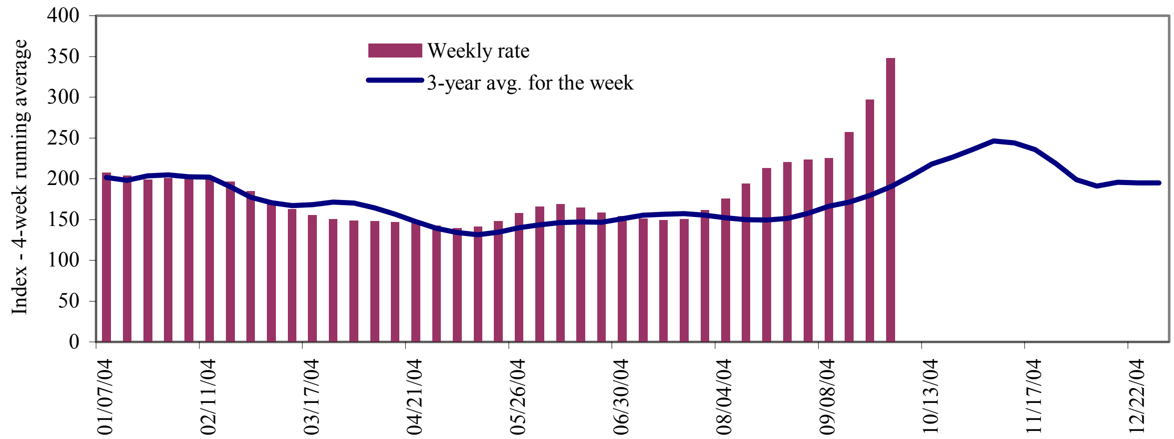
*A unit train refers to shipments of at least 52 cars. Shuttle train rates are available for qualified shipments of more than 100 cars that meet railroad efficiency requirements.

**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	9/29/2004	9/22/2004	Oct '04	Dec '04
Twin Cities	382	335	383	0
Mid-Mississippi	400	357	373	0
Illinois River	426	383	367	224
St. Louis	414	390	344	176
Lower Ohio	423	386	360	185
Cairo-Memphis	388	384	339	169

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

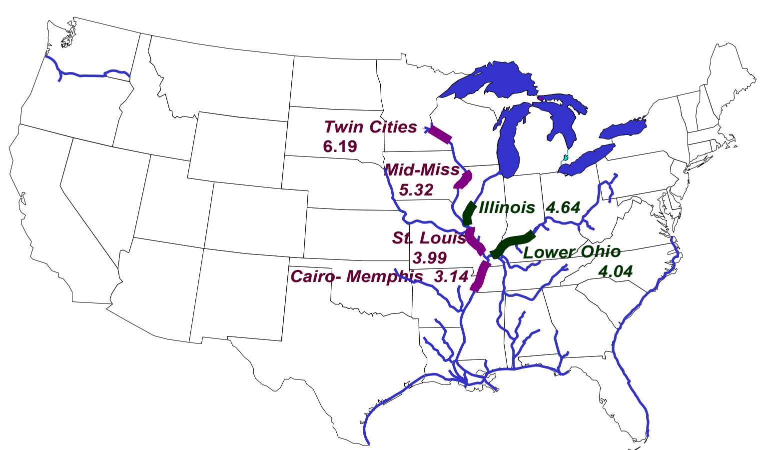
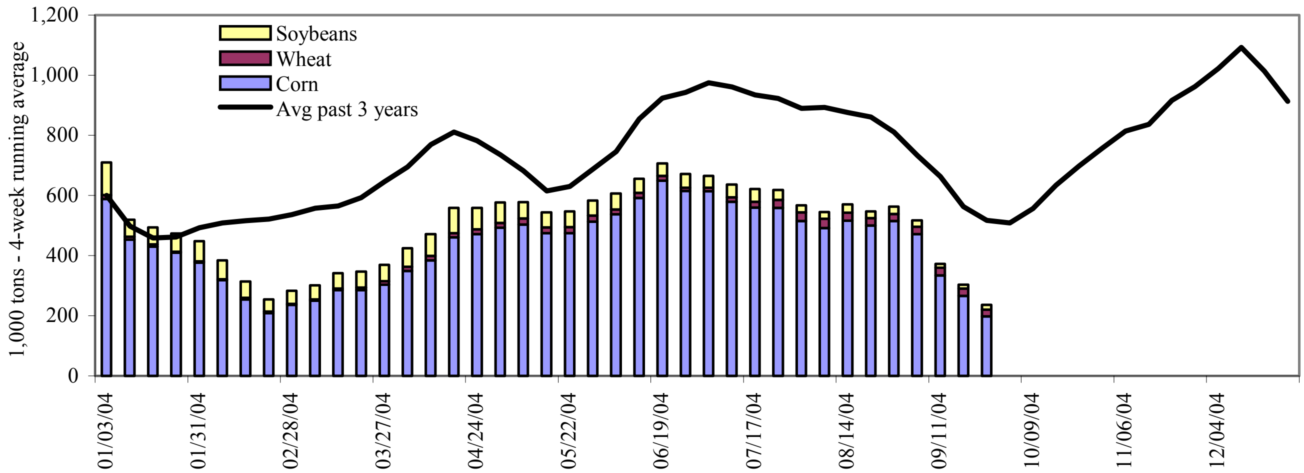


Figure 7

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 09/25/04	Corn	Wheat	Soybean	Other	Total
Mississippi River					
Rock Island, IL (L15)	147	12	35	0	194
Winfield, MO (L25)	70	7	6	2	85
Alton, IL (L26)	187	12	22	2	223
Granite City, IL (L27)	203	12	22	2	239
Illinois River (L8)	105	5	31	3	144
Ohio River (L52)	206	12	25	12	255
Arkansas River (L1)	0	39	7	0	47
2004 YTD	18,872	2,243	2,969	539	24,622
2003 YTD	21,381	2,280	5,653	595	29,909
2004 as % of 2003 YTD	88	98	53	91	82
Total 2003	29,898	2,787	9,146	695	42,526

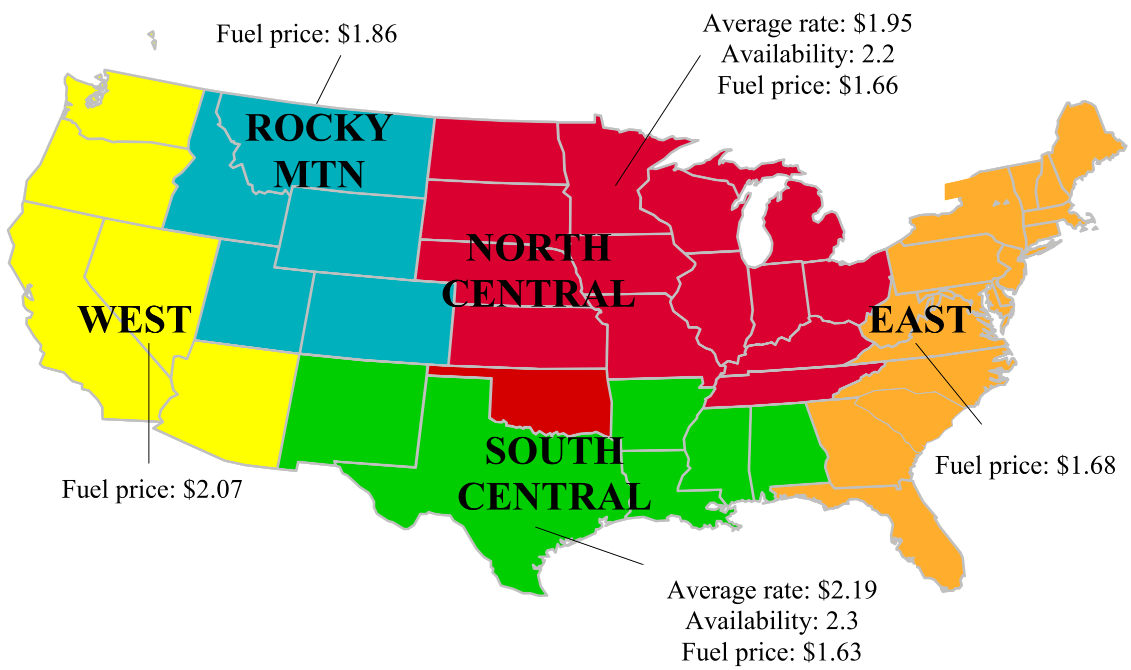
YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1. "Other" refers to oats, barley, sorghum, and rye.

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 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 10/04/04 (US$/gallon)

			Change from	
Region	**Location**	**Price**	**Week ago**	**Year ago**
I	East Coast	2.058	0.039	0.614
	New England	2.155	0.053	0.597
	Central Atlantic	2.144	0.052	0.598
	Lower Atlantic	2.013	0.032	0.622
II	Midwest	2.019	0.037	0.584
III	Gulf Coast	2.000	0.029	0.612
IV	Rocky Mountain	2.065	0.066	0.581
V	West Coast	2.238	0.069	0.687
	California	2.290	0.054	0.688
Total	U.S.	2.053	0.041	0.608

*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			
9/23/2004	1,659	766	1,205	1,010	76	4,717	7,798	7,639	20,154
This week year ago	2,244	497	1,127	1,020	196	5,085	8,274	9,579	22,938
Cumulative exports-crop year 2/									
2004/05 YTD	3,345	1,548	2,617	1,624	197	9,330	2,638	795	12,763
2003/04 YTD	3,979	1,375	2,253	1,212	402	9,221	3,021	568	12,810
2004/05 as % of 2003/04	84	113	116	134	49	101	87	140	100
2003/04 Total	12,697	3,785	6,928	4,889	1,053	29,353	47,704	24,102	101,159
2002/03 Total	6,896	2,899	6,645	3,517	720	20,677	39,646	28,908	89,231

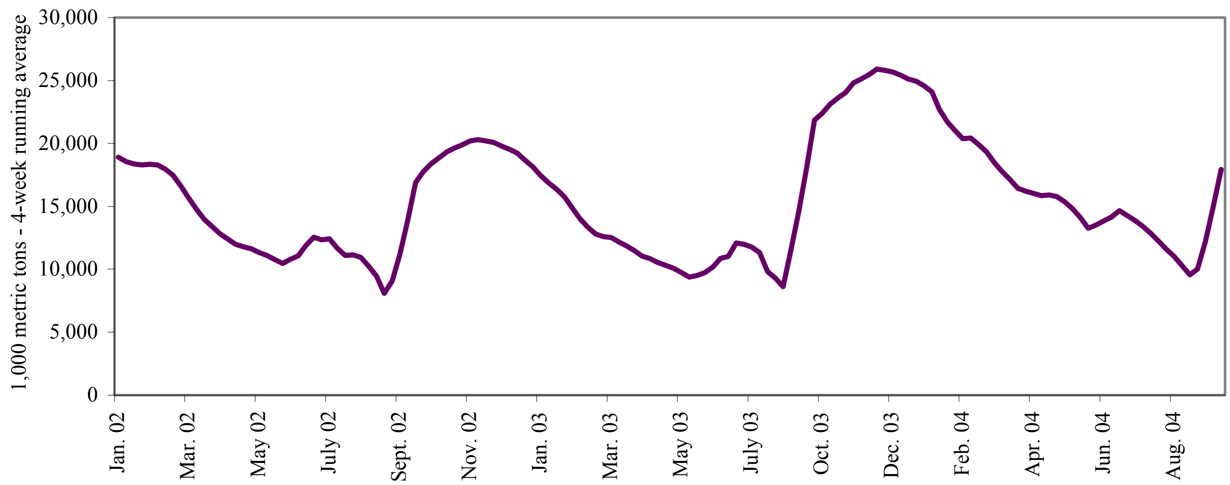
Note: YTD = year-to-date. Crop year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31, 1/ = Current outstanding unshipped export sales to date

2/ = New crop year in effect for corn and soybean 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)

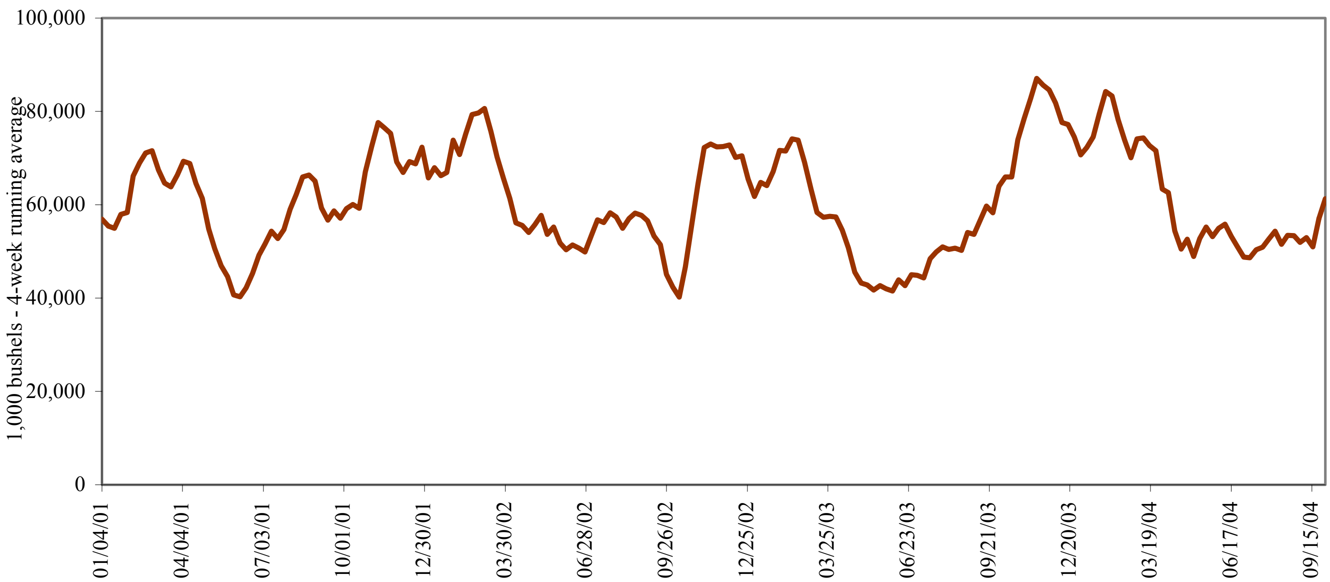
	Pacific Region			Mississippi Gulf			Texas Gulf			Port Region total		
Week ending	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Pacific	Mississippi	Texas
09/30/04	265	109	0	143	803	368	158	0	4	374	1,314	162
2004 YTD	9,156	8,072	1,934	5,812	24,409	7,555	6,551	51	18	19,162	37,776	6,621
2003 YTD	6,670	4,042	2,894	4,666	22,460	11,809	5,052	49	23	13,606	38,935	5,124
2004 as % of 2003	137	200	67	125	109	64	130	104	81	141	97	129
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

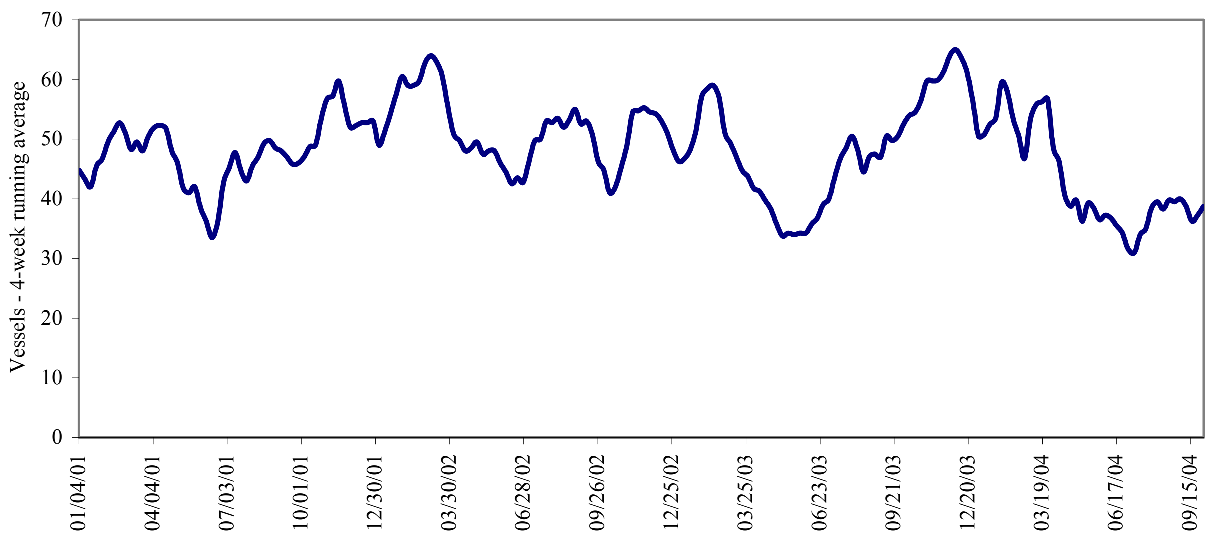
Table 14--Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
9/30/2004	25	48	88	10	9
9/23/2004	27	42	57	9	10
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

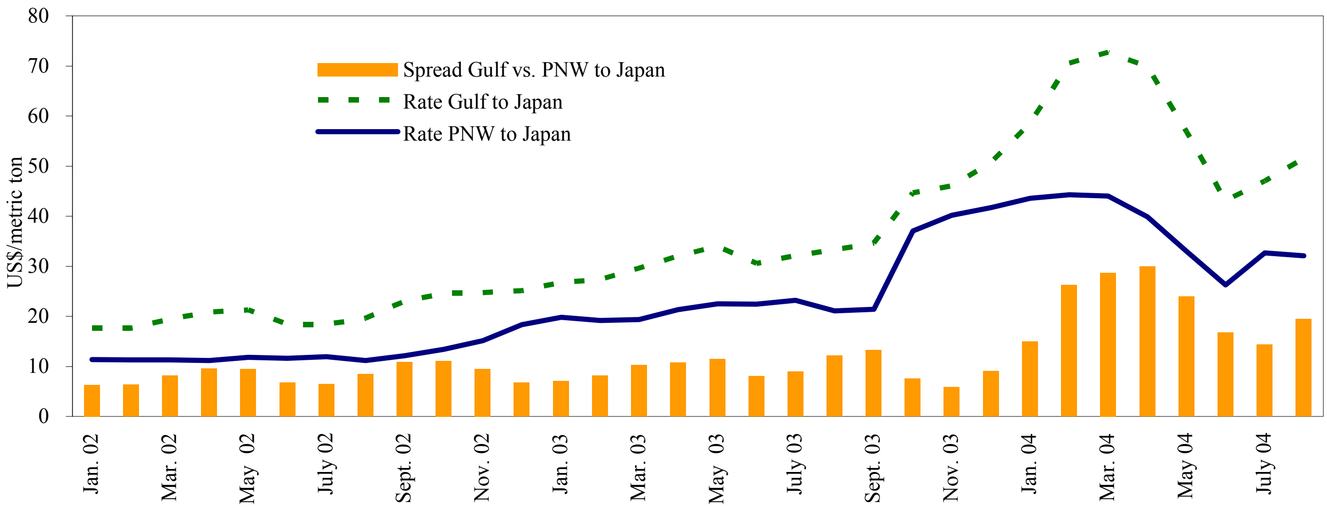
Table 15--Quarterly ocean freight rates (average rates & percentage changes) (US$/metric ton)

Countries/ regions	2004 3rd qtr	2003 3rd qtr	Percent change	Countries/ regions	2004 3rd qtr	2003 3rd qtr	Percent change
Gulf to				**Pacific NW to**			
Japan	$50.08	$33.83	48	Japan	$37.00	---	---
China	$54.00	$34.00	59				
N. Europe	---	$22.88	---	**Argentina/Brazil to**			
N. Africa	---	$25.50	---	Med. Sea	$46.92	$24.50	92
Med. Sea	---	$24.88	---	China	---	$34.75	---

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 10/02/04

Export region	Import region	Grain	Month	Volume loads (metric tons)	Freight rate ($/metric ton)
U.S. Gulf	Ecuador*	Wheat	Oct 1/10	5,500	55.00
U.S. Gulf	Ecuador*	Wheat	Oct 1/10	20,500	56.12
U.S. Gulf	Jordan*	Wheat	Oct 1/10	50,000	58.43
U.S. Gulf	China	Hvy grain	Oct 1/10	55,000	54.00
U.S. Gulf	Japan	Hvy grain	Oct 1/5	54,000	53.75
PNW	Japan	Hvy grain	Oct 1/10	54,000	37.00
PNW	Russia*	Wheat	Oct 4/14	25,000	77.01

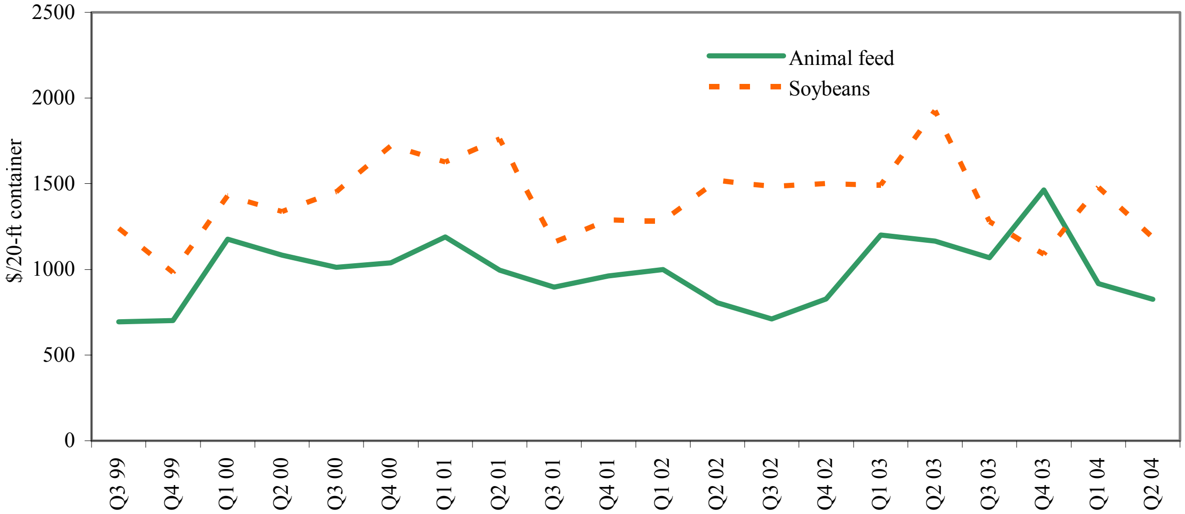
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

*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%)

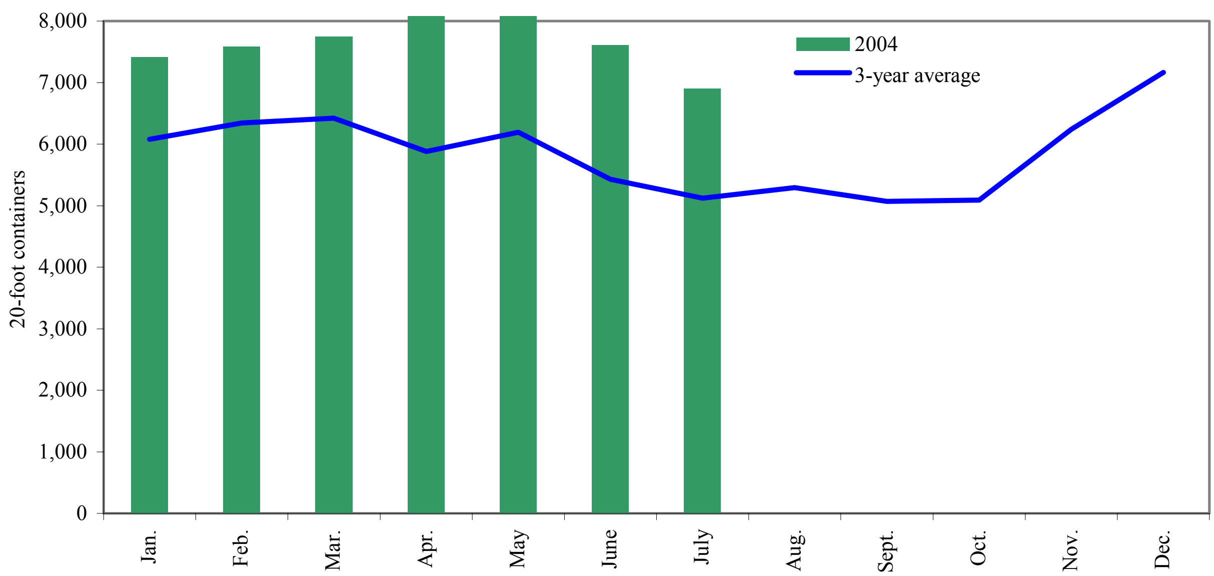
Quarter 2, 2004.

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