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Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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March 24 2016

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WEEKLY HIGHLIGHTS

Panama Canal Trains Workforce on Operating New Locks…
On March 17, the Panama Canal Authority announced that over one thousand workers are receiving training on the operations of the new locks of the Panama Canal expansion. Personnel participating in the training include future operators and lockmasters of Agua Clara (Atlantic) and Cocoli (Pacific) Locks, engineers, systems reliability, and information technology personnel. The training is a requirement under the new lock's contract and will be offered by different projects' subcontractors responsible for the electrochemical equipment. The courses will be standardized and offered to additional personnel after the completion of the initial phase of the training. Human resources instructors will also attend the courses as they become certified in offering these courses to other Canal workers.

… and Announces Draft Restrictions Due to El Niño Phenomenon
As previously anticipated in two earlier advisories (see 03/03/16 Grain Transportation Report), the Panama Canal Authority announced that draft restrictions will be imposed on vessels transiting the canal starting April 18, 2016. The restrictions are imposed as temporary and preventive measures to mitigate the effects of anticipated climatic variability related to El Niño. The maximum authorized transit draft is set at 11.89 meters (39.0 feet). The restrictions will be waived for vessels loaded over 11.89 meters (39.0 feet), prior to or on March 21. Vessels loaded after March 21, shall comply with the new draft limitation. Depending on the level of Gatum Lake at the time of transit, vessels may be required to trim or off-load cargo if they are over 11.89 meters (39.0) in draft. Draft restrictions will be implemented in 15-centimeter (6-inch) decrements at a time, with each restriction announced at least 4 weeks in advance. For more information, see https://www.pancanal.com/common/maritime/advisories/2016/a-12-2016.pdf

Mississippi Gulf Grain Inspections Rebound
For the week ending March 17, **total inspections of grain** (corn, wheat, soybeans) for export from all major export regions reached 2.1 million metric tons (mmt), up 5 percent from the past week, unchanged from last year, and 3 percent below the 3-year average. Wheat and corn inspections increased 15 and 23 percent, respectively, from the previous week. Soybean inspections, however, decreased 20 percent for the same period. Mississippi Gulf grain inspections rebounded, increasing 19 percent from the past week and 12 percent from the same time last year. Pacific Northwest (PNW) grain inspections were down 14 percent from the past week. Outstanding export sales (unshipped) of grain were up for corn but down for wheat and soybeans.

Snapshots by Sector

Export Sales
During the week ending March 10, **unshipped balances** of wheat, corn, and soybeans totaled 26.2 mmt, down 21 percent from the same time last year. Net weekly **wheat export sales** of .213 mmt were down 35 percent from the previous week. Net **corn export sales** were 1.23 mmt, up 11 percent from the previous week, and net **soybean export sales** were .561 mmt, up 19 percent from the past week.

Rail
U.S. Class I railroads originated 21,802 **grain carloads** for the week ending March 12, down 2 percent from the previous week, down 4 percent from last year, and up 9 percent from the 3-year average.

Average April shuttle **secondary railcar bids/offers** per car were $206 below tariff for the week ending March 17, down $31 from last week, and $138 lower than last year. There were no non-shuttle secondary railcar bids/offers this week.

Barge
For the week ending March 19, **barge grain movements** totaled 513,312 tons, 5 percent higher than last week, and down 8 percent from the same period last year.

For the week ending March 19, 327 grain barges **moved down river**, up 9 percent from last week; 579 grain barges were **unloaded in New Orleans**, up 9 percent from the previous week.

Ocean
For the week ending March 17, 36 **ocean-going grain vessels** were loaded in the Gulf, 9 percent more than the same period last year. Fifty-one vessels are expected to be loaded within the next 10 days, 6 percent less than the same period last year.

For the week ending March 17, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $23.00 per metric ton, 2 percent more than the previous week. The cost of shipping from the PNW to Japan was $14.00 per metric ton, unchanged from the previous week.

Fuel
During the week ending March 21, U.S. average **diesel fuel prices** increased 2 cents from the previous week at $2.12 per gallon, down $0.75 from the same week last year.

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Feature Article/Calendar

Canada Grain Transportation: A Comparative Look at Export Logistics and Impacts on U.S. Grain Transportation

Background

The Canadian grain production system is dynamic and complex and transportation plays an important role. Canadian grain is produced in two major areas—about 58 percent in the Prairie Provinces of Western Canada (Alberta, Saskatchewan and Manitoba), and the other 42 percent in Quebec and Ontario (Figure 1).[1] The major grains produced in Canada are wheat, canola, barley, peas, soybeans and oats, which are usually planted in April and May, and harvested between August and September. The vast majority of Canadian grain is sold the year it is produced. Canada has a relatively small population that cannot use all the grain produced. Consequently, the majority of its grain is destined for export, including significant volumes transported by truck to U.S. millers, processors, feed manufacturers and other buyers. There is limited storage capacity in off-farm elevators and export grain is normally moved from the farms to ports as ships arrive. Canadian grain also moves by truck and rail to U.S. export facilities for re-export to foreign markets. Canadian growers export 70 percent of their wheat, 50 percent of their oilseeds, and 25 percent of their coarse grains.[2] Canada and the U.S. compete for the same major grain buyers: China, Japan and Mexico.

Transportation Characteristics

According to the *Canada Transportation Act Review*, about 94 percent of all Canadian grain exports move by rail to port locations or to the U.S. and Mexico.[3] The rest is shipped by truck. Canadian shippers rely much more on rail than grain shippers in the U.S., where rail moves about 45 percent of grain exports to ports locations. The balance of U.S. export grain is moved by barge (45 percent) or truck (10 percent).[4]

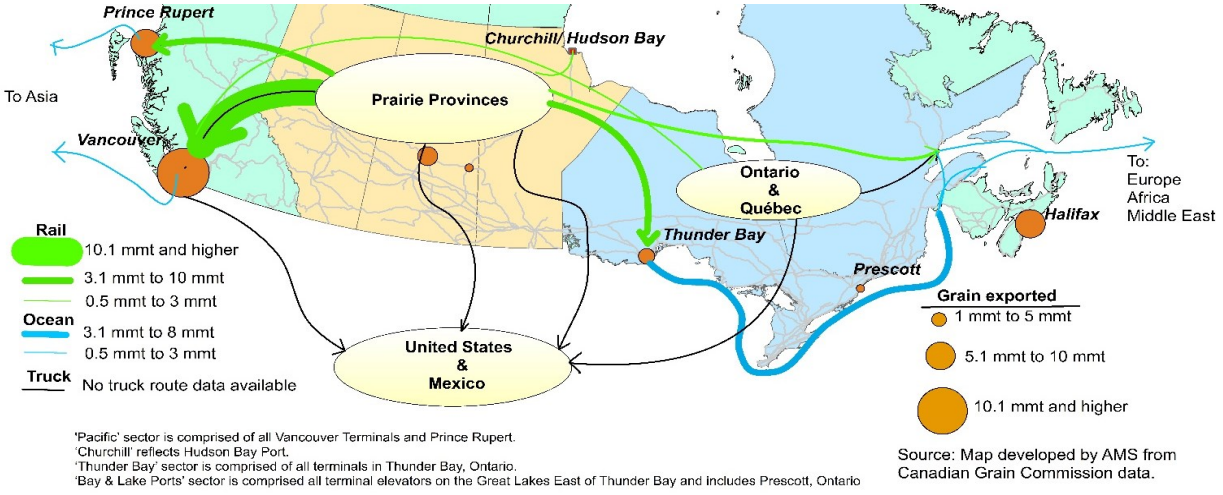
Table 1

Canadian Grain Exported 2014/2015		
Export Ports Region	In Thousand Tons	Share
Pacific	26,720	67%
Prairie Elevators	3,050	8%
Churchill	525	1%
Thunder Bay	2,031	5%
Bay & Lakes	529	1%
St. Lawrence	6,817	17%
Total	39,671	100%

Modal Flow to Export Ports

Canada has two Class I railroads, Canadian National (CN) and Canadian Pacific (CP). These two railroads control about 85 percent of the railroad tracks in Western Canada. In the U.S., seven Class I railroads (including CN and CP) share the grain market. Each Canadian railroad owns and operates its own rail lines in geographically distinct regions, and each company transports about half of the grain crops. CN operates mostly in the north, while CP has a strong presence in the south. Short line railroads haul the remaining 15 percent. According to the Canada Grain Commission, Canadian grain exported in 2014-2015 was shipped through several routes including: the Pacific West Coast route (Vancouver and Prince Rupert), at 26.7 million metric tons (mmt) or 67 percent; Thunder Bay at 2 mmt or 5 percent; the St. Lawrence Seaway to the east, at 6.8 mmt or 17 percent, and finally the south to the U.S. and Mexico, at 3 mmt or 8 percent, for a grand total of 39.7 mmt.[5] A smaller portion of the total shipments (about 1 percent each) is shipped through the Bay and Lakes ports and the northern ports of Churchill and Manitoba (see Figure 1 and Table1). About 2 percent of Canadian grain is exported through American ports in the Pacific Northwest.

Figure 1: All Grains Modal Flow



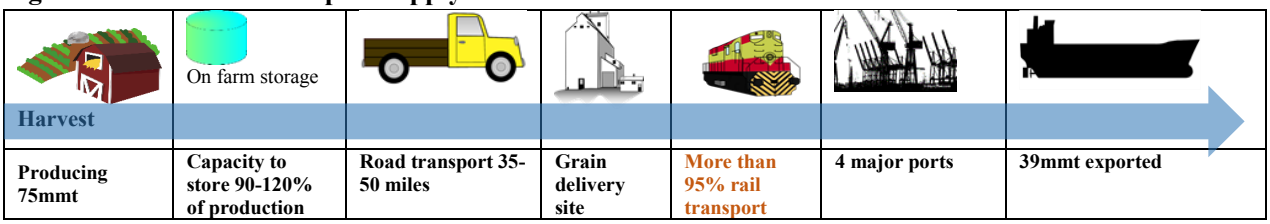
[1] Transport Canada
[2] Transport Canada http://www.tc.gc.ca/eng/ctareview2014/CTAR_Vol1_EN.pdf
[3] Canada Transportation Act Review http://www.tc.gc.ca/eng/ctareview2014/canada-transportation-act-review.html
[4] https://www.ams.usda.gov/sites/default/files/media/ModalJune2015.pdf (5-year average)
[5] Canadian Grain Commission www.grainscanada.gc.ca

Supply Chain

Typically, Canadian farmers first move their harvest by truck to on-farm storage, and then later to inland elevators where it is moved to the ports by rail (Figure 2). Commercial grain handling systems in Canada have limited capacity to store crops at harvest. Western Canada relies on a delivery from farm to port to meet export demand on an as-needed basis.[1] In the Western region, the Canadian grain supply chain tends to operate a "pull" delivery system, where grain is moved from the farm to a delivery site and then directly to a port to be available for loading as the ship arrives. This "pull" delivery system is fostered by several factors, including a longer winter season that can restrict movements, varietal control on seeds planted in Canada, the lack of an inland waterway system and a high reliance on export markets to generate grain demand in the Western region. Meanwhile, Eastern Canada more closely resembles the United States in marketing export grain, although a greater percentage of Canadian exports are represented by specialty grains and container shipments than the United States.

In the United States, on-farm storage capacity – at about 13.2 billion bushels – is capable of storing approximately 55 percent of annual U.S. production. Another 11 billion bushels of storage is provided by off- farm commercial elevators.[2] From there, export grain is moved either by rail, truck, or barge to the export port. The combined elevator storage capacity in Canada (inland and at the ports) is no more than 20 percent of the average annual production.[3] In the United States, grain elevators can store up to 55 percent of the crop produced annually.[4] Most U.S. grain tends to move on a "push" system where typically a significant amount of grain is moved from a farm to a grain elevator or port storage immediately after harvest, waiting for a ship's future arrival. In addition, domestic utilization of grains and oilseeds from the livestock, poultry, ethanol, grain processing and milling sectors represents major sources of demand in the United States that do not exist to the same degree in Canada. In the United States, elevator storage reduces risk for individual farms, lowers storage costs and provides good selling options to different buyers. These benefits to U.S. farmers are not available to Canadian farmers who store their grains on the farm. The U.S. export chains are also more flexible due to the availability of more export ports, thus increasing the option of using either road, rail or barge transport

Figure 2: Grain flow for export supply chain in Canada



Canada and the U.S. have common elements in the grain export scheme. Similar companies, buyers, and sellers operate on both sides of the border. However, there are differences in trading patterns, origin options, type of grain transported, and logistical options. There are also important differences in legislative and regulatory areas.

Conclusion and Impacts on U.S. Grain Transportation

Although the United States and Canada are neighbors, their grain transportation systems are somewhat different. While the Canadian system relies more heavily on rail to move grain to export ports, the United States uses rail, barge, and truck to move its grain to the export ports. The use of storage is also different in the two countries. The Canadian transportation cost represents a larger portion of the total landed cost to Asia, compared to the United States. The two countries share the navigation through the Great Lakes and St. Lawrence Seaway, but both countries export relatively small quantities of their exports through the Seaway, thus exerting little or no significant impact on grain transportation and logistics. The countries share two Class I railroads (CN and CP) in the movement of their grains. Although the United States has five other Class I railroads, CN and CP move 17 percent of U.S. grains. Therefore, despite the fact that the railroads face different regulations in both countries, a significant disruption in Canadian railroad operations may also affect grain movements in the United States, especially in the regions served by the Canadian railroads. Usually, the Canadian rail system has complimented the extensive U.S. transportation network, making the U.S. landed costs to foreign markets competitive. pierre.bahizi@ams.usda.gov, surajudeen.olowolayemo@ams.usda.gov

[1] Transport Canada http://www.tc.gc.ca/eng/ctareview2014/CTAR_Vol1_EN.pdf
[2] USDA, NASS
[3] Statistics Canada
[4] USDA, NASS - Grain Stocks

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit Train	Shuttle		Gulf	Pacific
03/23/16	142	254	193	138	103	99
03/16/16	141	254	194	129	105	99

[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	3/18/2016	3/11/2016
Corn	IL--Gulf	-0.50	-0.53
Corn	NE--Gulf	-0.74	-0.78
Soybean	IA--Gulf	-1.05	-1.00
HRW	KS--Gulf	-1.12	-1.22
HRS	ND--Portland	-1.75	-1.87

Note: nq = no quote

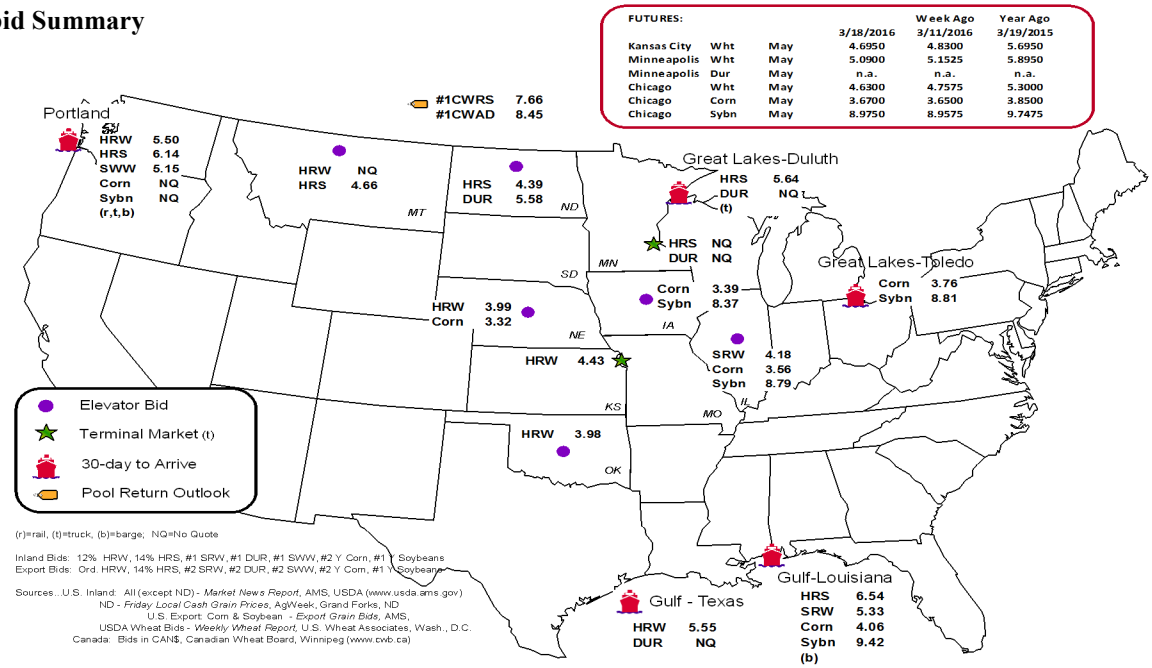
Source: Transportation & Marketing Programs/AMS/USDA

n/a: quotes are not available due to the holiday

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]

For the Week Ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-Border Mexico[3]
3/16/2016[p]	3	1,815	5,196	201	7,215	3/12/2016	1,862
3/09/2016[r]	278	1,409	6,655	490	8,832	3/5/2016	1,936
2016 YTD[r]	5,072	16,897	65,777	6,879	94,625	2016 YTD	20,044
2015 YTD[r]	8,413	13,490	61,103	8,780	91,786	2015 YTD	17,627
2016 YTD as % of 2015 YTD	60	125	108	78	103	% change YTD	114
Last 4 weeks as % of 2015[2]	43	105	109	81	102	Last 4wks % 2015	118
Last 4 weeks as % of 4-year avg.[2]	42	137	127	73	113	Last 4wks % 4 yr	119
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736
Total 2014	44,617	83,674	256,670	32,107	417,068	Total 2014	98,422

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2015 and prior 4-year average.

[3] Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads to reflect switching between KCSM and FerroMex.

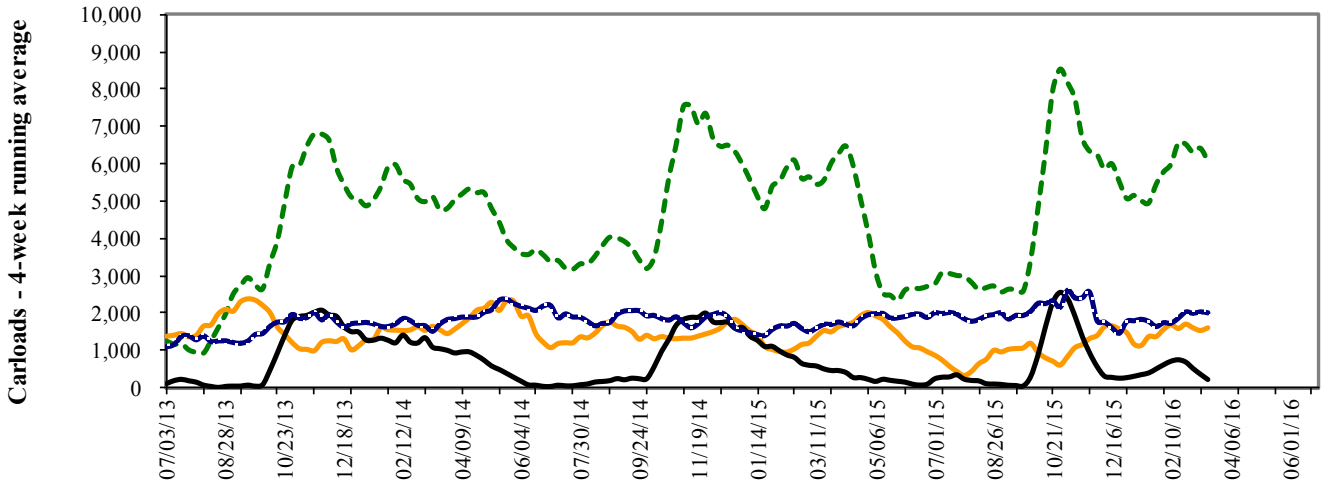
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 24 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail Deliveries to Port



Pacific Northwest: 4 wks. ending 3/16--up 9% from same period last year; up 27 from 4-year average

Texas Gulf: 4 wks. ending 3/16--up 5% from same period last year; up 37% from 4-year average

Miss. River: 4 wks. ending 3/16--down 57% from same period last year; down 58% from 4-year average

Cross-border: 4 wks. ending 3/12--up 18% from same period last year; up 19% from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

For the week ending:	East		West			U.S. total	Canada	
3/12/2016	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,064	2,295	10,927	1,124	5,392	21,802	3,006	4,137
This week last year	1,629	2,725	12,093	987	5,337	22,771	4,128	4,213
2016 YTD	19,946	28,164	110,673	8,854	53,506	221,143	34,445	42,874
2015 YTD	21,477	30,232	109,141	8,529	56,737	226,116	41,633	43,819
2016 YTD as % of 2015 YTD	93	93	101	104	94	98	83	98
Last 4 weeks as % of 2015*	111	97	101	106	100	101	79	99
Last 4 weeks as % of 3-yr avg.**	111	97	114	122	109	110	89	95
Total 2015	104,039	149,043	536,173	45,445	267,720	1,102,420	211,868	236,263

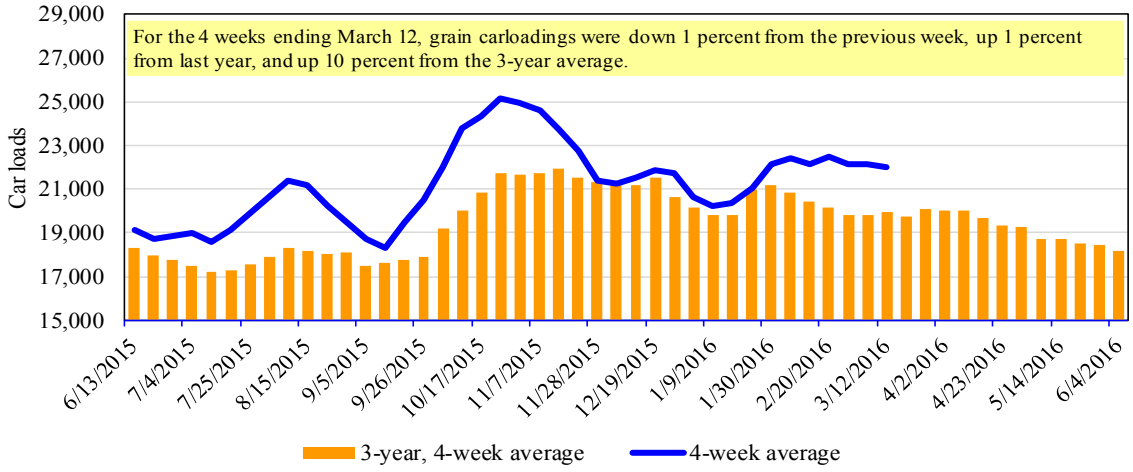
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**The past 4 weeks as a percent of the same period from 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]

For the week ending:		Delivery period							
3/17/2016		Apr-16	Apr-15	May-16	May-15	Jun-16	Jun-15	Jul-16	Jul-15
BNSF[3]	COT grain units	no bids	12	no bids	6	no bids	5	no bids	59
	COT grain single-car[5]	0	6 . . 54	0	3 . . 11	0	2 . . 13	0	52 . . 135
UP[4]	GCAS/Region 1	no bids	no bids	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.

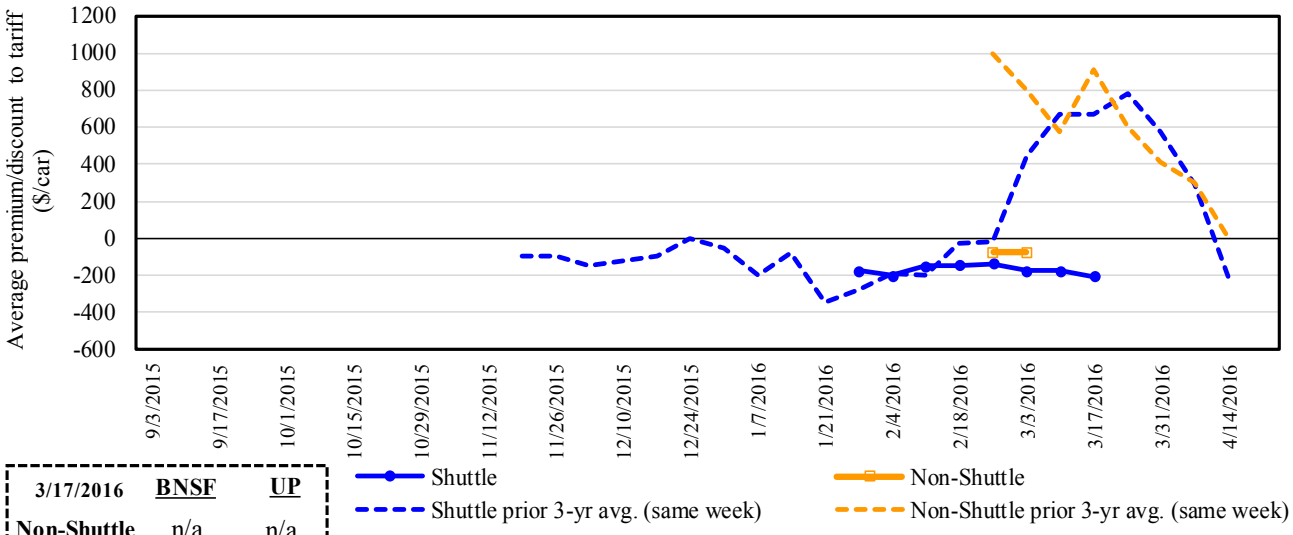
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

[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 April 2016, Secondary Market

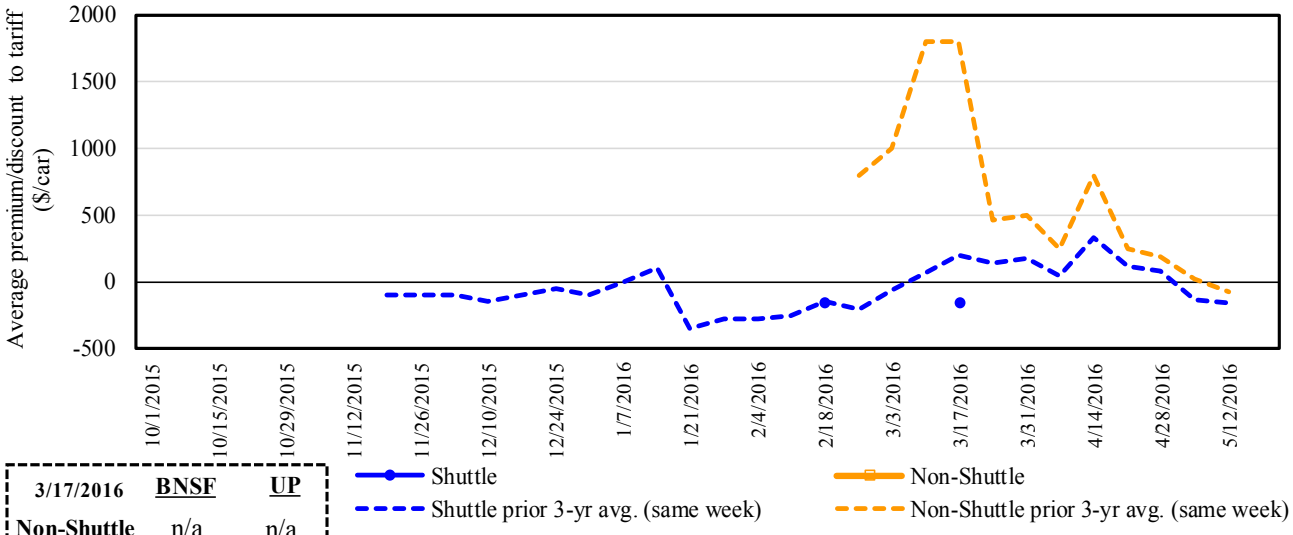


3/17/2016	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	-$206

There were no Non-Shuttle bids/offers this week.
Average Shuttle bids/offers fell $31 this week and are $69 below the peak.

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 May 2016, Secondary Market



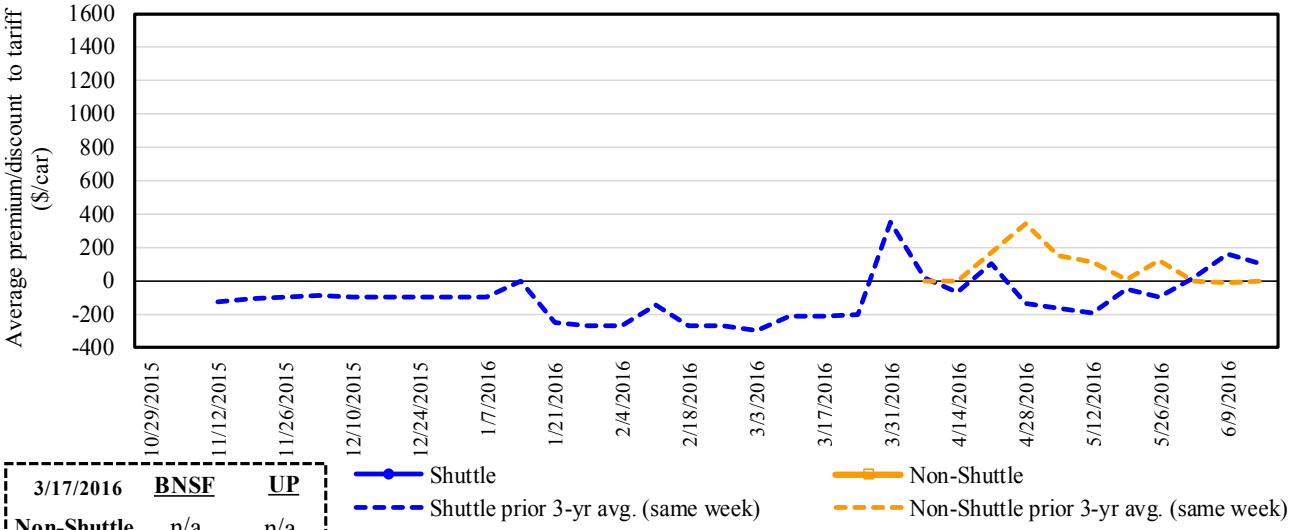
3/17/2016	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	-$150

There were no Non-Shuttle bids/offers this week.
There were no Shuttle bids/offers last week.

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 June 2016, Secondary Market



3/17/2016	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	n/a

There were no Non-Shuttle bids/offers this week.
There were no Shuttle bids/offers this week.

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]

For the week ending: 3/17/2016		Delivery period					
		Apr-16	May-16	Jun-16	Jul-16	Aug-16	Sep-16
Non-shuttle	**BNSF-GF**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**(206)**	**(150)**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	19	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	(6)	75	n/a	n/a	n/a	n/a

[1]Average premium/discount to tariff, $/car-last week

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 James B. Joiner Co., Tradewest Brokerage Co.

The **tariff rail rate** is the base price of freight rail service, and together with **fuel surcharges** and any **auction and secondary rail** values constitute the full cost of shipping by rail. Typically, auction and secondary rail values are a small fraction of the full cost of shipping by rail relative to the tariff rate. High auction and secondary rail values, during times of high rail demand or short supply, can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

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

Effective date: 3/1/2016	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	$3,605	$0	$35.80	$0.97	4
	Grand Forks, ND	Duluth-Superior, MN	$3,563	-$24	$35.15	$0.96	-3
	Wichita, KS	Los Angeles, CA	$6,950	-$122	$67.80	$1.85	6
	Wichita, KS	New Orleans, LA	$4,243	$0	$42.14	$1.15	1
	Sioux Falls, SD	Galveston-Houston, TX	$6,486	-$100	$63.41	$1.73	7
	Northwest KS	Galveston-Houston, TX	$4,511	$0	$44.80	$1.22	1
	Amarillo, TX	Los Angeles, CA	$4,710	$0	$46.77	$1.27	-1
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,681	$0	$36.55	$0.93	5
	Toledo, OH	Raleigh, NC	$6,061	$0	$60.19	$1.53	5
	Des Moines, IA	Davenport, IA	$2,168	$0	$21.53	$0.55	-2
	Indianapolis, IN	Atlanta, GA	$5,004	$0	$49.69	$1.26	2
	Indianapolis, IN	Knoxville, TN	$4,311	$0	$42.81	$1.09	2
	Des Moines, IA	Little Rock, AR	$3,444	$0	$34.20	$0.87	1
	Des Moines, IA	Los Angeles, CA	$5,052	$0	$50.17	$1.27	-2
Soybeans	Minneapolis, MN	New Orleans, LA	$3,929	$0	$39.02	$1.06	0
	Toledo, OH	Huntsville, AL	$5,051	$0	$50.16	$1.37	5
	Indianapolis, IN	Raleigh, NC	$6,178	$0	$61.35	$1.67	6
	Indianapolis, IN	Huntsville, AL	$4,529	$0	$44.98	$1.22	1
	Champaign-Urbana, IL	New Orleans, LA	$4,395	$0	$43.64	$1.19	6
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,953	-$70	$38.56	$1.05	2
	Wichita, KS	Galveston-Houston, TX	$3,871	-$55	$37.90	$1.03	7
	Chicago, IL	Albany, NY	$5,492	$0	$54.54	$1.48	11
	Grand Forks, ND	Portland, OR	$5,611	-$122	$54.51	$1.48	2
	Grand Forks, ND	Galveston-Houston, TX	$5,931	-$127	$57.64	$1.57	-8
	Northwest KS	Portland, OR	$5,478	$0	$54.40	$1.48	-1
Corn	Minneapolis, MN	Portland, OR	$5,000	-$148	$48.18	$1.22	-7
	Sioux Falls, SD	Tacoma, WA	$4,960	-$136	$47.91	$1.22	-7
	Champaign-Urbana, IL	New Orleans, LA	$3,481	$0	$34.57	$0.88	5
	Lincoln, NE	Galveston-Houston, TX	$3,600	-$79	$34.96	$0.89	-3
	Des Moines, IA	Amarillo, TX	$3,795	$0	$37.69	$0.96	-1
	Minneapolis, MN	Tacoma, WA	$5,000	-$147	$48.19	$1.22	-7
	Council Bluffs, IA	Stockton, CA	$4,640	-$152	$44.57	$1.13	-3
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,490	-$136	$53.17	$1.45	-7
	Minneapolis, MN	Portland, OR	$5,510	-$148	$53.25	$1.45	-7
	Fargo, ND	Tacoma, WA	$5,380	-$121	$52.23	$1.42	-7
	Council Bluffs, IA	New Orleans, LA	$4,425	$0	$43.94	$1.20	10
	Toledo, OH	Huntsville, AL	$4,226	$0	$41.97	$1.14	6
	Grand Island, NE	Portland, OR	$5,360	$0	$53.23	$1.45	-1

[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: 3/1/2016							
				Fuel	Tariff plus surcharge per:		Percent
Commodity	Origin state	Destination region	Tariff rate/car[1]	surcharge per car[2]	metric ton[3]	bushel[3]	change[4] Y/Y
Wheat	MT	Chihuahua, CI	$7,459	$0	$76.21	$2.07	4
	OK	Cuautitlan, EM	$6,514	$0	$66.55	$1.81	-4
	KS	Guadalajara, JA	$6,995	$70	$72.19	$1.96	-3
	TX	Salinas Victoria, NL	$4,142	$0	$42.32	$1.15	4
Corn	IA	Guadalajara, JA	$8,397	$49	$86.30	$2.19	-2
	SD	Celaya, GJ	$7,840	$0	$80.11	$2.03	-1
	NE	Queretaro, QA	$7,879	$0	$80.50	$2.04	0
	SD	Salinas Victoria, NL	$6,545	$0	$66.87	$1.70	8
	MO	Tlalnepantla, EM	$7,238	$0	$73.96	$1.88	0
	SD	Torreon, CU	$7,240	$0	$73.98	$1.88	1
Soybeans	MO	Bojay (Tula), HG	$8,652	$54	$88.95	$2.42	2
	NE	Guadalajara, JA	$9,142	$52	$93.93	$2.55	0
	IA	El Castillo, JA	$9,470	$0	$96.76	$2.63	0
	KS	Torreon, CU	$7,439	$30	$76.31	$2.07	1
Sorghum	NE	Celaya, GJ	$7,344	$41	$75.45	$1.91	-3
	KS	Queretaro, QA	$7,563	$0	$77.27	$1.96	8
	NE	Salinas Victoria, NL	$6,168	$0	$63.02	$1.60	8
	NE	Torreon, CU	$6,672	$25	$68.42	$1.74	-1

[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

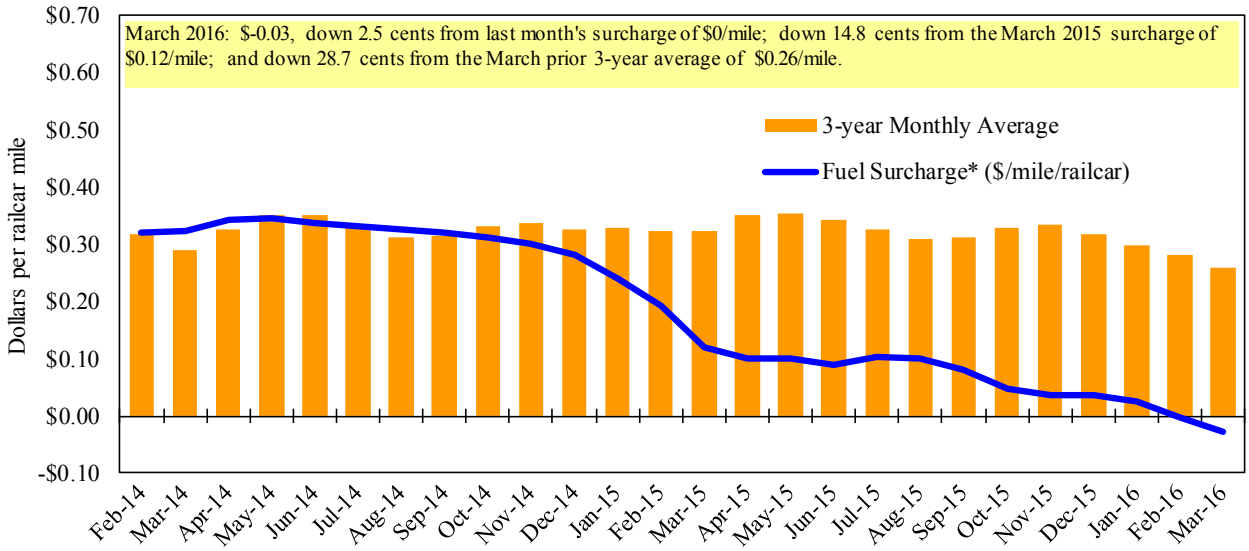
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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.

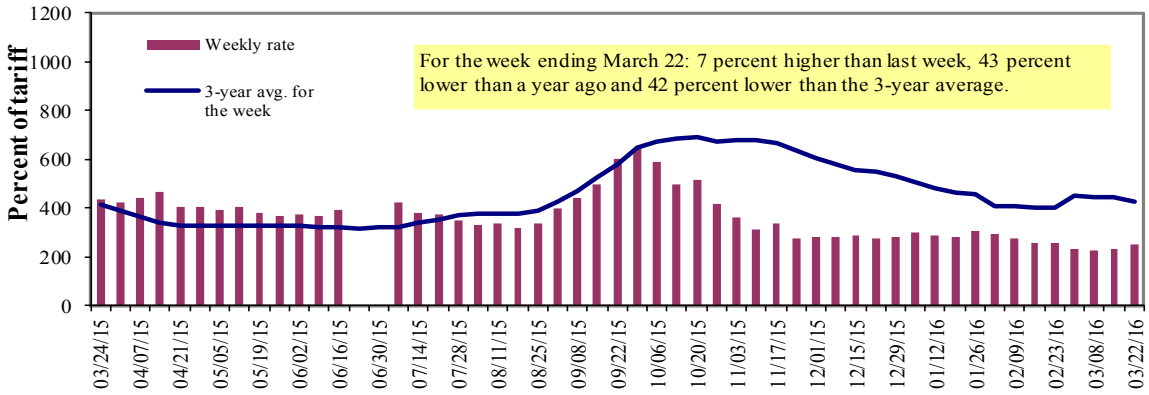
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.

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]	3/22/2016	317	262	248	178	197	187	167
	3/15/2016	318	238	233	160	180	180	153
$/ton	3/22/2016	19.62	13.94	11.51	7.10	9.24	7.55	5.24
	3/15/2016	19.68	12.66	10.81	6.38	8.44	7.27	4.80
Current week % change from the same week:								
	Last year	-	-40	-43	-54	-39	-42	-43
	3-year avg. [2]	-	43	-42	-49	-42	-45	-40
Rate[1]	April	315	262	247	173	193	183	163
	June	315	262	247	173	193	183	163

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds; missing data due to winter closure or flooding

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9
Benchmark tariff rates

Calculating barge rate per ton:
(Rate * 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.

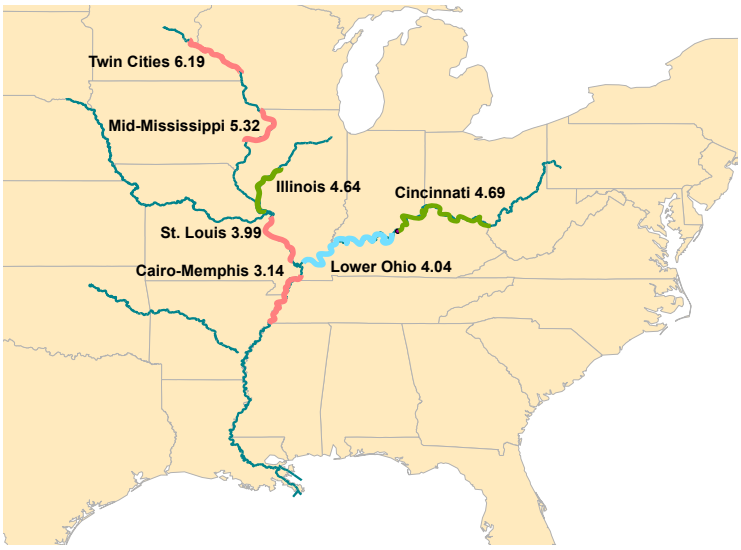
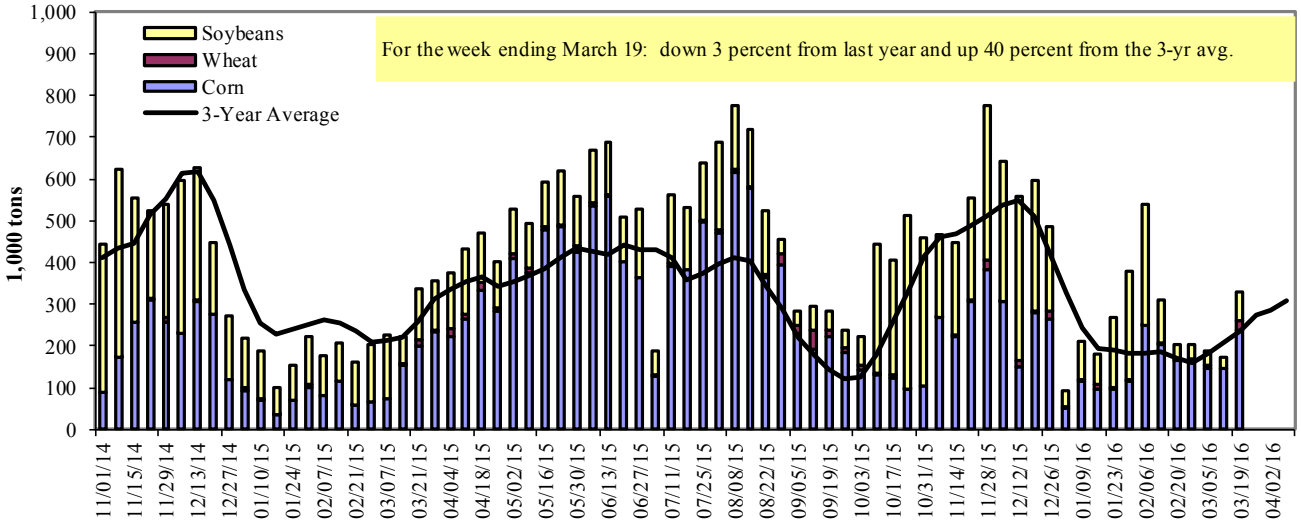


Figure 10

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)

For the week ending 3/19/2016	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	54	2	19	2	76
Winfield, MO (L25)	140	5	48	3	195
Alton, IL (L26)	260	14	80	3	358
Granite City, IL (L27)	239	22	67	3	332
Illinois River (L8)	153	3	37	0	193
Ohio River (L52)	76	2	47	9	133
Arkansas River (L1)	0	21	27	0	48
Weekly total - 2016	315	45	141	12	513
Weekly total - 2015	337	33	183	3	556
2016 YTD[1]	3,237	268	2,805	45	6,356
2015 YTD	2,827	237	2,871	47	5,981
2016 as % of 2015 YTD	115	113	98	97	106
Last 4 weeks as % of 2015[2]	122	159	66	532	100
Total 2015	19,215	1,686	14,191	359	35,451

[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.

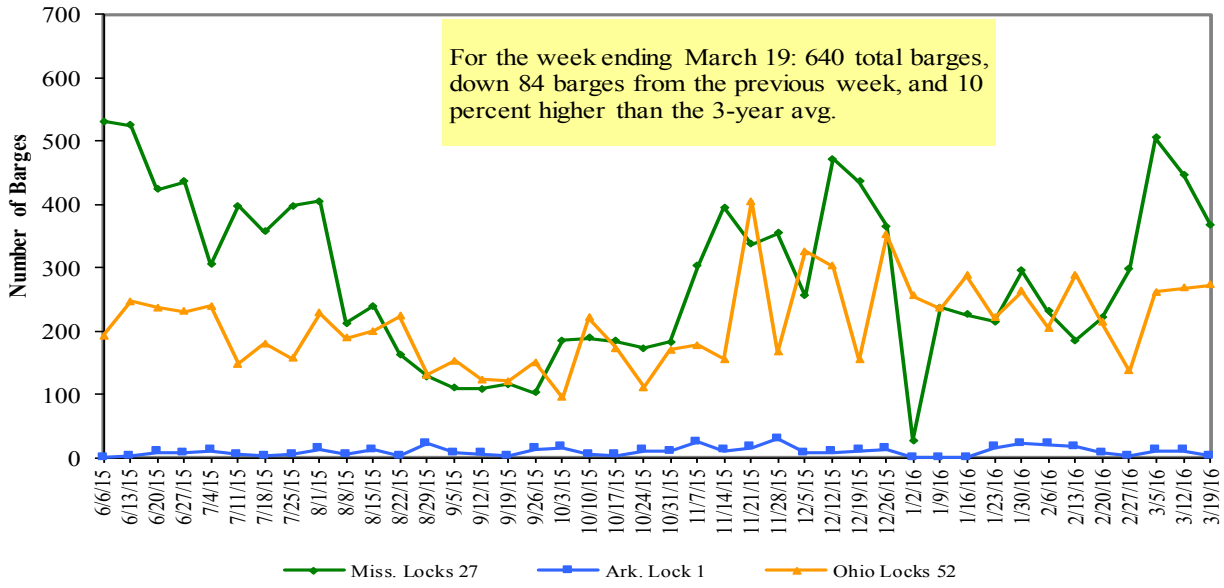
[2] As a percent of same period in 2015.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers

Figure 11

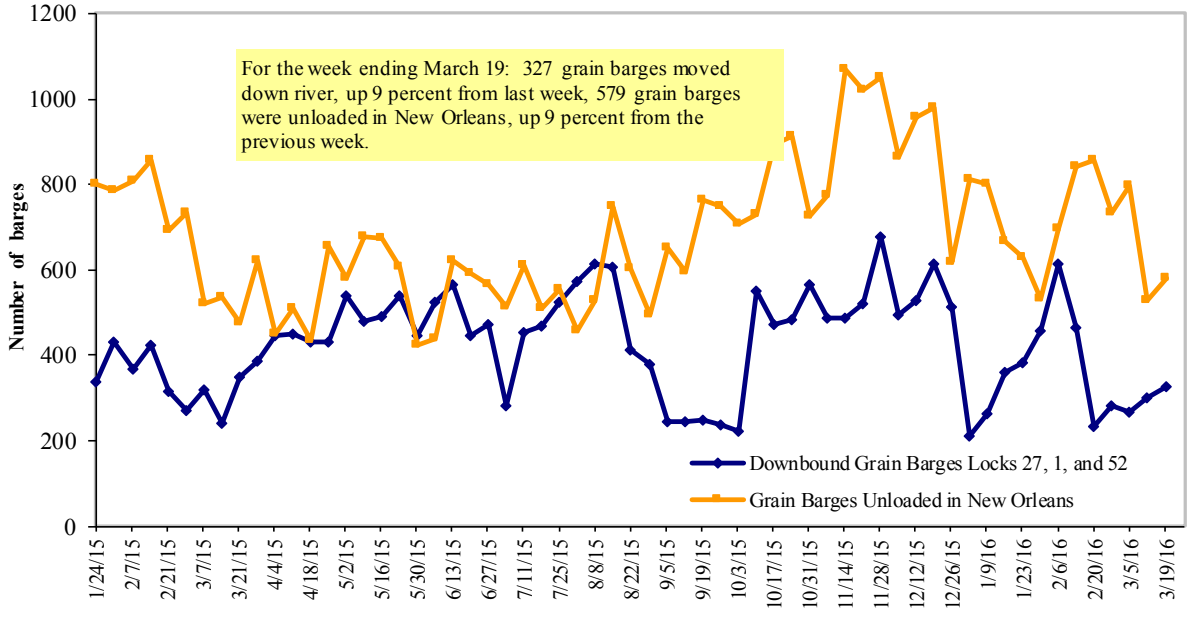
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 3/21/2016 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.172	0.019	-0.855
	New England	2.228	0.024	-0.972
	Central Atlantic	2.280	0.031	-0.951
	Lower Atlantic	2.079	0.009	-0.758
II	Midwest[2]	2.090	0.025	-0.678
III	Gulf Coast[3]	1.991	0.001	-0.724
IV	Rocky Mountain	2.056	0.057	-0.711
V	West Coast	2.311	0.026	-0.690
	West Coast less California	2.179	0.026	-0.636
	California	2.418	0.028	-0.734
Total	U.S.	2.119	0.020	-0.745

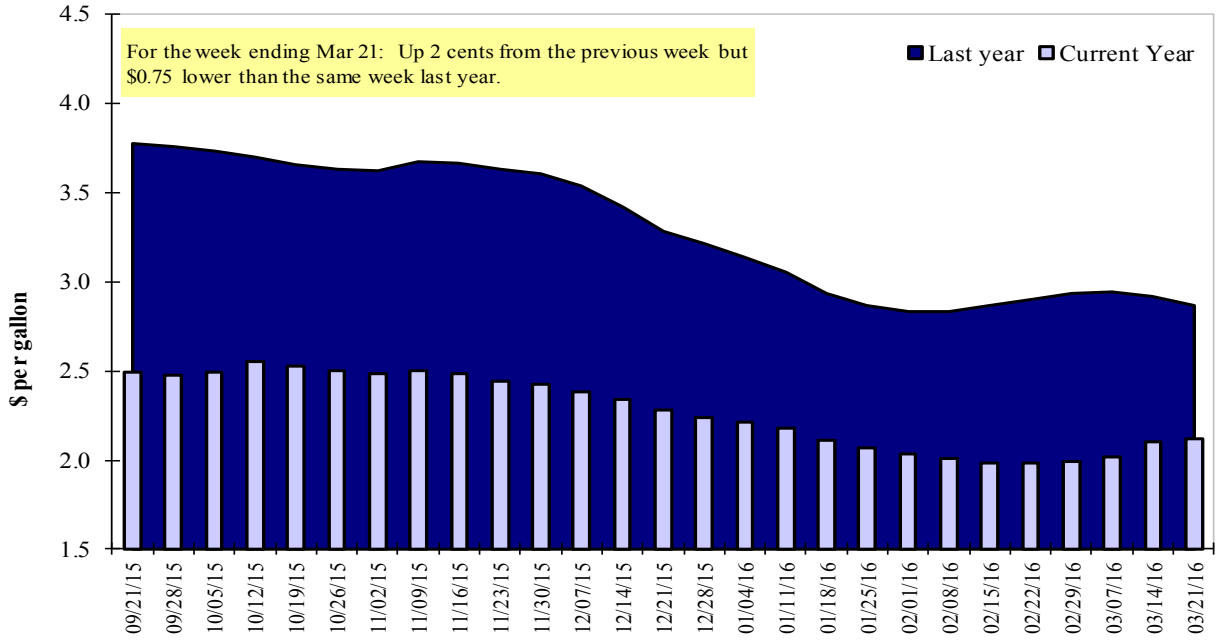
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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)

	Wheat						Corn	Soybeans	Total
For the week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances[1]									
3/10/2016	981	380	1,442	764	100	3,666	13,348	3,613	20,627
This week year ago	1,656	744	1,732	656	136	4,924	15,807	5,497	26,228
Cumulative exports-marketing year[2]									
2015/16 YTD	4,304	2,601	4,661	2,767	571	14,904	16,701	39,804	71,409
2014/15 YTD	5,396	2,875	5,752	3,159	540	17,722	20,740	42,441	80,903
YTD 2015/16 as % of 2014/15	80	90	81	88	106	84	81	94	88
Last 4 wks as % of same period 2014/15	66	55	87	116	75	79	82	77	80
2014/15 Total	7,009	3,654	7,250	3,758	665	22,336	45,205	49,614	117,155
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309

[1] Current unshipped (outstanding) export sales to date

[2] Shipped export sales to date; new marketing year now in effect 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

For the week ending 3/10/2016	Commitments[2] 2015/16 Current MY	Commitments[2] 2014/15 Last MY	% change current MY from last MY	Exports[3] 3-year avg 2011-2013
	- 1,000 mt -			- 1,000 mt -
Japan	5,356	7,783	(31)	10,079
Mexico	10,381	8,710	19	8,145
Korea	850	2,384	(64)	2,965
Colombia	3,505	3,109	13	3,461
Taiwan	588	1,143	(49)	1,238
Top 5 Importers	**20,680**	**23,129**	**(11)**	**25,887**
Total US corn export sales	**30,049**	**36,547**	**(18)**	**34,445**
% of Projected	72%	77%		
Change from prior week	**1,227**	**502**		
Top 5 importers' share of U.S. corn export sales	69%	63%		75%
USDA forecast, March 2016	**41,985**	**47,430**	**(11)**	
Corn Use for Ethanol USDA forecast, March 2016	**132,715**	**132,309**	**0**	

(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 Ranking Reports - http://apps.fas.usda.gov/export-sales/myrkaug.htm; 3-yr average

Table 14

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

For the week ending 3/10/2016	Total Commitments[2] 2015/16 Current MY	2014/15 Last MY	% change current MY from last MY	Exports[3] 3-yr avg. 2011-13
	- 1,000 mt -			- 1,000 mt -
China	26,934	29,790	(10)	24,211
Mexico	2,570	2,751	(7)	2,971
Indonesia	1,182	1,379	(14)	1,895
Japan	1,672	1,516	10	1,750
Taiwan	1,091	1,113	(2)	1,055
Top 5 importers	**33,448**	**36,549**	**(8)**	**31,882**
Total US soybean export sales	**43,416**	**47,938**	**(9)**	**39,169**
% of Projected	94%	95%		
Change from prior week	561	342		
Top 5 importers' share of U.S. soybean export sales	77%	76%		**81%**
USDA forecast, March 2016	**46,049**	**50,218**	**(8)**	

(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

For the week ending 3/10/2016	Total Commitments[2] 2015/16 Current MY	2014/15 Last MY	% change current MY from last MY	Exports[3] 3-yr avg 2012-2014
	- 1,000 mt -			- 1,000 mt -
Japan	2,271	2,940	(23)	3,113
Mexico	2,110	2,642	(20)	2,807
Nigeria	1,389	1,903	(27)	2,512
Philippines	1,934	2,194	(12)	2,105
Brazil	386	1,508	(74)	2,091
Korea	1,097	1,201	(9)	1,273
Taiwan	937	979	(4)	1,007
Indonesia	491	629	(22)	751
Colombia	585	559	5	662
Thailand	449	606		618
Top 10 importers	**11,200**	**14,555**	(23)	**16,939**
Total US wheat export sales	**18,569**	**22,646**	**(18)**	**26,361**
% of Projected	88%	97%		
Change from prior week	213	392		
Top 10 importers' share of U.S. wheat export sales	60%	64%		64%
USDA forecast, March 2016	**21,117**	**23,270**	**(9)**	

(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	For the Week Ending 03/17/16	Previous Week*	Current Week as % of Previous	2016 YTD*	2015 YTD*	2016 YTD as % of 2015 YTD	Last 4-weeks as % of: Last Year	Last 4-weeks as % of: Prior 3-yr. avg.	2015 Total*
Pacific Northwest									
Wheat	261	211	124	2,434	2,755	88	98	97	10,985
Corn	121	179	68	1,237	1,920	64	54	94	7,232
Soybeans	207	296	70	4,101	3,267	126	170	118	11,809
Total	**589**	**685**	**86**	**7,772**	**7,942**	**98**	**96**	**104**	**30,027**
Mississippi Gulf									
Wheat	60	94	64	765	827	93	115	71	4,504
Corn	660	491	134	5,226	5,911	88	92	106	26,701
Soybeans	314	285	110	7,777	8,114	96	136	132	29,593
Total	**1,033**	**870**	**119**	**13,768**	**14,851**	**93**	**109**	**111**	**60,797**
Texas Gulf									
Wheat	133	101	132	620	780	80	64	54	3,724
Corn	31	30	104	189	126	150	301	277	596
Soybeans	0	0	n/a	92	210	44	n/a	n/a	864
Total	**164**	**130**	**125**	**901**	**1,116**	**81**	**79**	**67**	**5,184**
Interior									
Wheat	38	23	167	272	271	100	96	130	1,388
Corn	169	99	172	1,227	1,190	103	108	134	6,201
Soybeans	73	95	77	918	930	99	130	94	3,518
Total	**280**	**216**	**130**	**2,417**	**2,392**	**101**	**113**	**116**	**11,106**
Great Lakes									
Wheat	0	0	n/a	0	12	0	n/a	0	997
Corn	0	0	n/a	0	0	n/a	n/a	n/a	485
Soybeans	0	0	n/a	0	0	n/a	n/a	0	733
Total	**0**	**0**	**n/a**	**0**	**12**	**0**	**n/a**	**0**	**2,216**
Atlantic									
Wheat	0	0	n/a	99	136	72	31	33	520
Corn	0	0	n/a	9	9	97	97	109	277
Soybeans	12	78	15	697	767	91	103	77	2,053
Total	**12**	**78**	**16**	**805**	**913**	**88**	**74**	**64**	**2,850**
U.S. total from ports**									
Wheat	492	428	115	4,190	4,781	88	89	79	22,118
Corn	981	798	123	7,888	9,156	86	84	108	41,492
Soybeans	605	753	80	13,585	13,288	102	142	120	48,570
Total	**2,078**	**1,980**	**105**	**25,662**	**27,225**	**94**	**102**	**105**	**112,180**

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

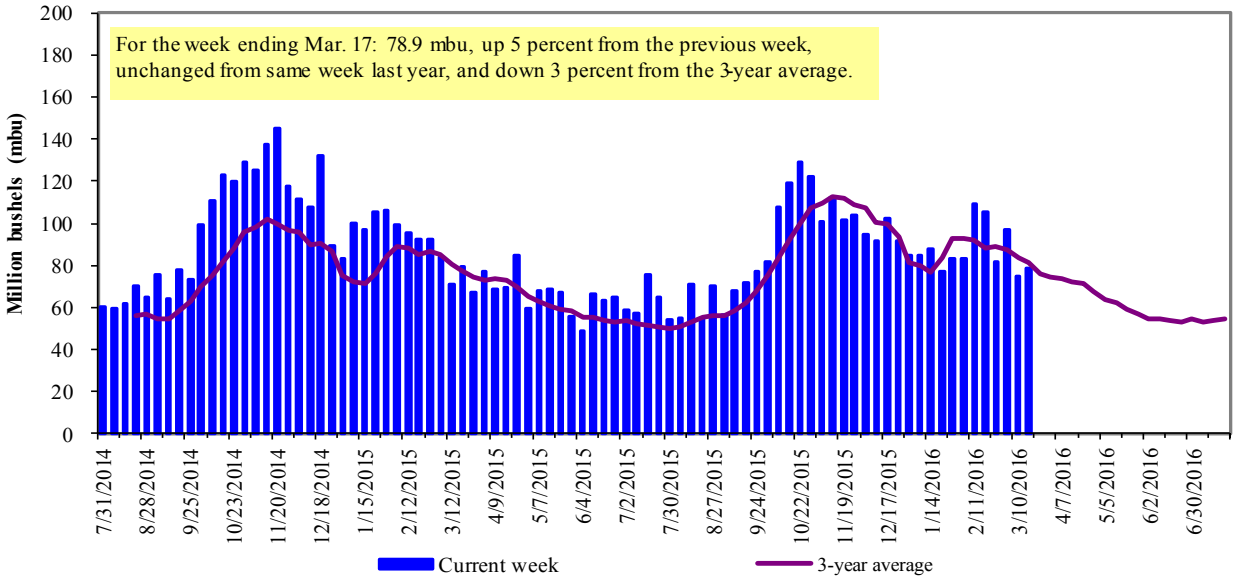
**Total only includes regions shown above

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 59 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2015.

Figure 14

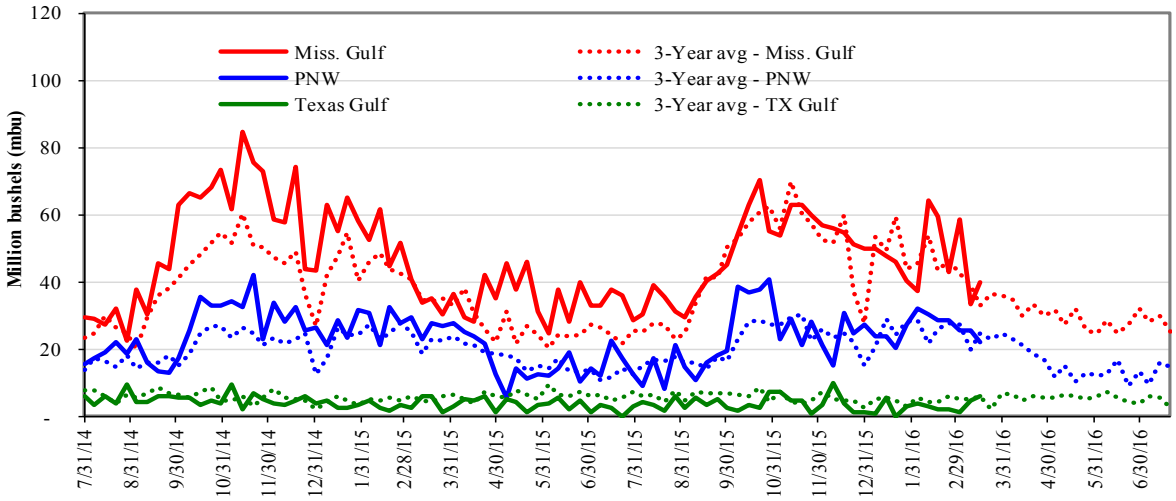
U.S. grain inspected for export (wheat, corn, and soybeans)



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)



Week ending 03/17/16 inspections (mbu):	
Mississippi Gulf:	39.7
PNW:	22.0
Texas Gulf:	6.1

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last Week:	up 19	up 25	up 20	down 14
Last Year (same week):	up 13	up 2	up 11	down 21
3-yr avg. (4-wk. mov. Avg):	down 1	up 7	unchanged	down 12

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

Ocean Transportation

Table 17

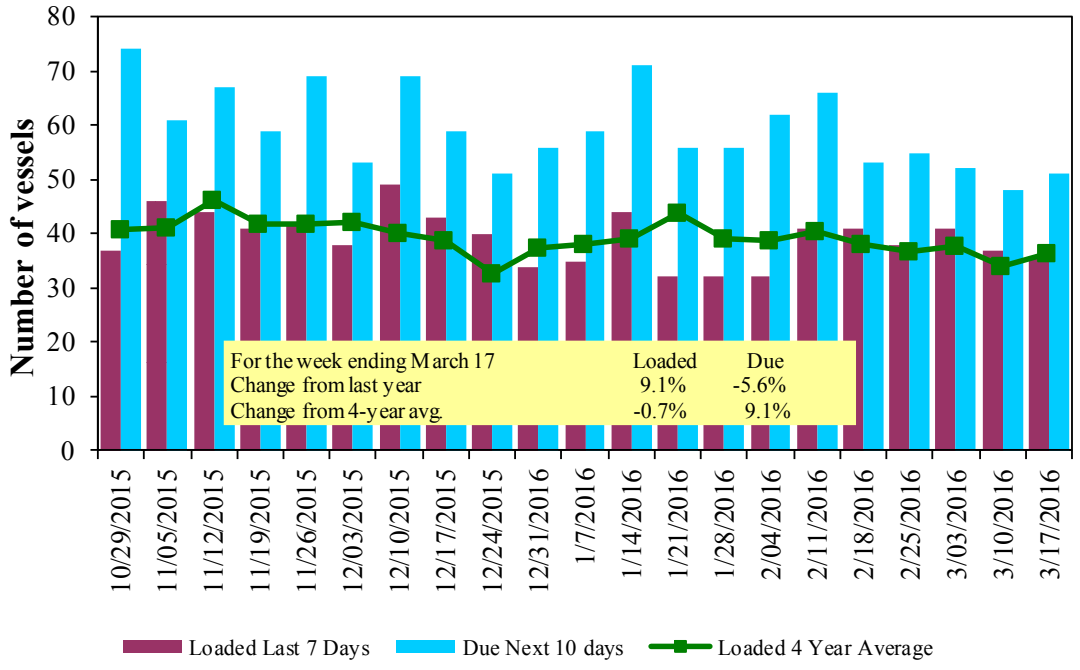
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
3/17/2016	40	36	51	16	n/a
3/10/2016	40	37	48	13	n/a
2015 range	(25..54)	(28..54)	(36..80)	(3..26)	n/a
2015 avg.	42	38	56	11	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

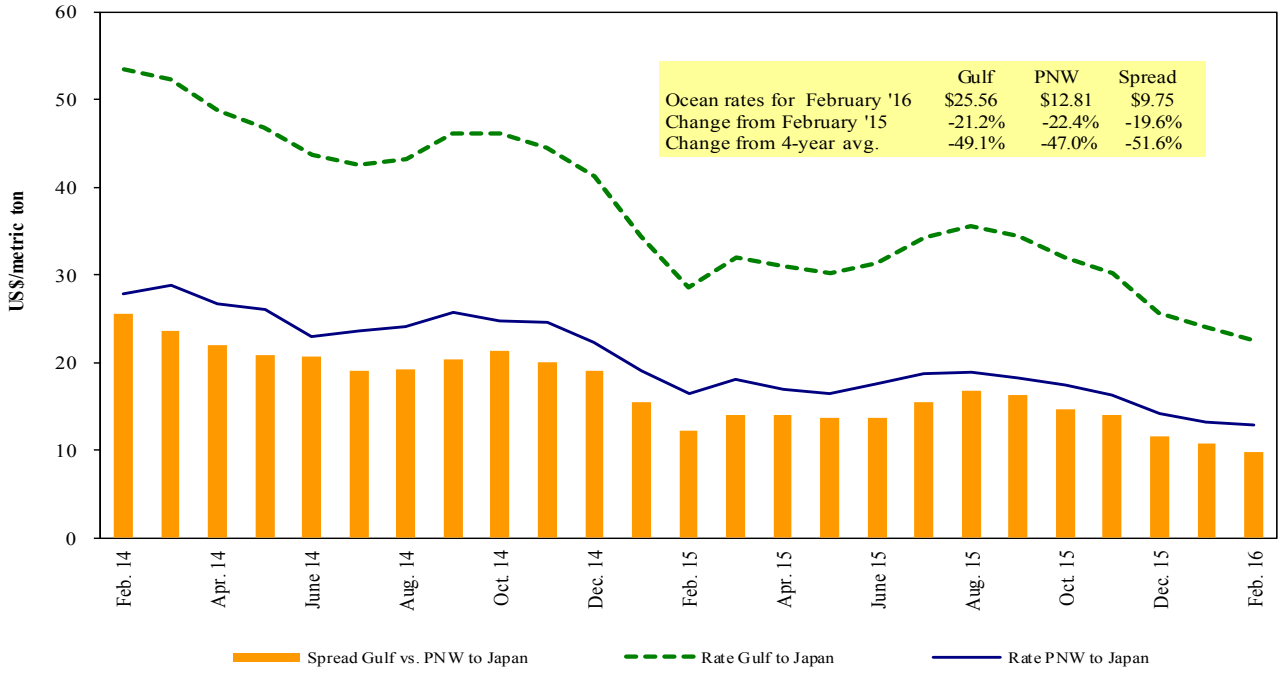
U.S. Gulf[1] Vessel Loading Activity



Source:Transportation & Marketing Programs/AMS/USDA
[1]U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

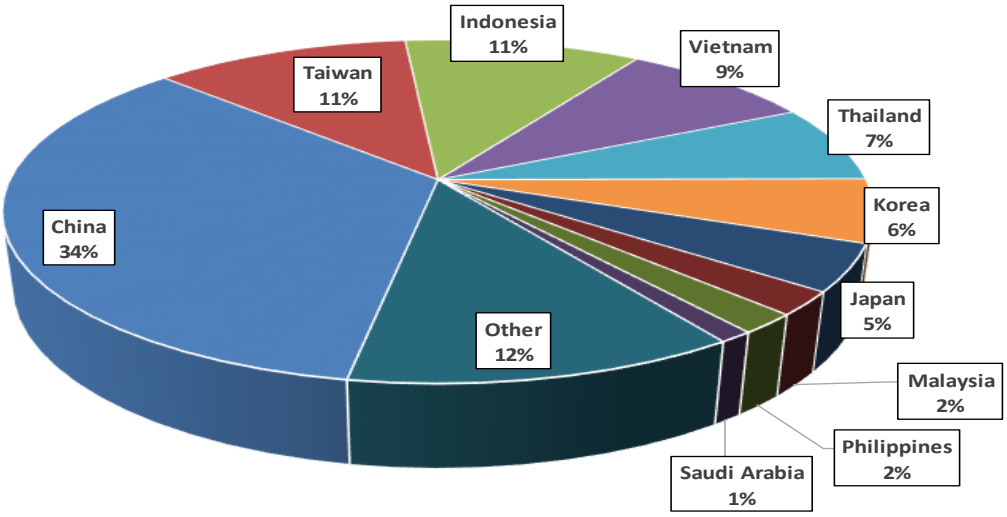
Ocean Freight Rates For Selected Shipments, Week Ending 03/19/2016

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Japan	Heavy Grain	April 5/18	52,000	21.25
U.S. Gulf	Japan	Heavy Grain	Apr 1/5	50,000	22.20
U.S.Gulf	China	Heavy Grain	Feb 15/20	53,000	20.50
U.S. Gulf	Djibouti	Wheat[1]	Apr 4/14	34,000	128.76
U.S. Gulf	Djibouti	Wheat	Mar 8/18	50,000	37.00
PNW	Algeria	Wheat	Feb 10/20	51,500	13.15
Brazil	China	Heavy Grain	May 1/6	60,000	14.75
Brazil	China	Heavy Grain	Apr 1/10	60,000	14.00
Brazil	China	Heavy Grain	Apr 1/10	60,000	13.90
Brazil	China	Heavy Grain	Mar 15/30	60,000	13.75
Brazil	China	Heavy Grain	Mar 15/30	60,000	13.25
Brazil	China	Heavy Grain	Mar 1/10	60,000	13.25
Brazil	China	Heavy Grain	Feb 20/29	60,000	13.85 op 14.60
Brazil	China	Heavy Grain	Feb 22/25	60,000	14.00
EC S America	China	Heavy Grain	May/June	60,000	14.75
EC S America	China	Heavy Grain	Feb/Mar 16	60,000	18.50
France	Algeria	Wheat	Mar 20/23	31,500	12.75
Odessa	Ghent	Grain	Feb 10/14	60,000	7.35
River Plate	Algeria	Corn	Mar 15/25	40,000	18.75

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

In 2014, containers were used to transport 7 percent of total U.S. waterborne grain exports. Approximately 63 percent of U.S. waterborne grain exports in 2014 went to Asia, of which 11 percent were moved in containers. Approximately 95 percent of U.S. waterborne containerized grain exports were destined for Asia.

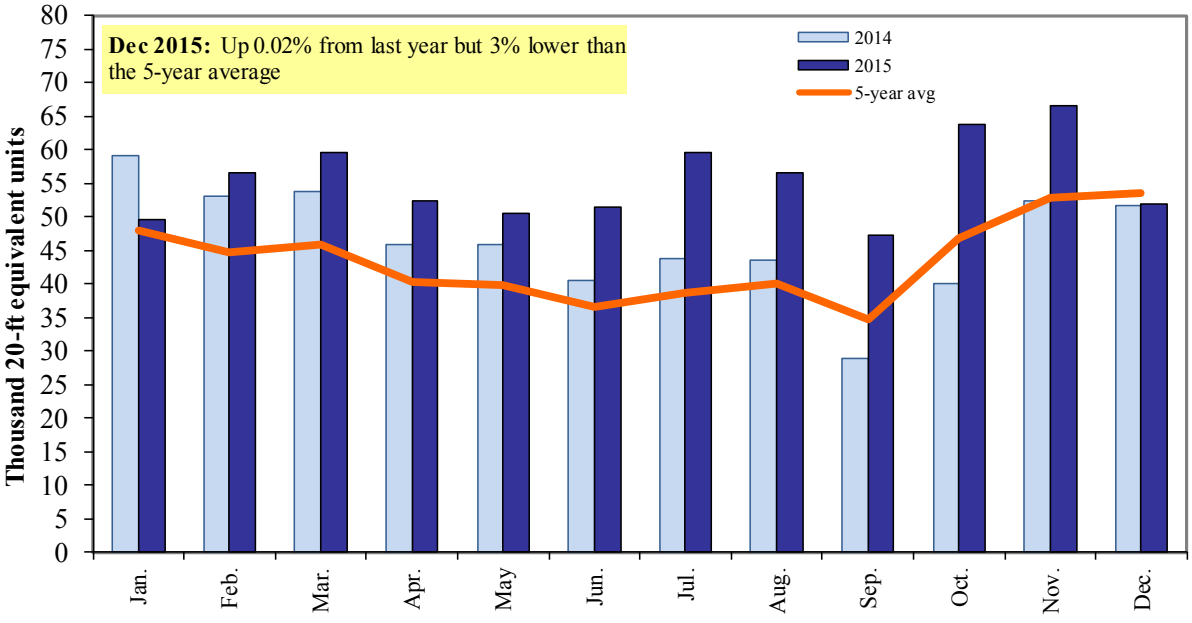
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-December 2015



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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