United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
www.ams.usda.gov/GTR

Contact Us

July 9, 2015

Contents

The next release is July 16, 2015

WEEKLY HIGHLIGHTS

Mississippi River Conditions Improve After Several Lock Closures Last Week
River conditions on the Upper Mississippi are improving but remain at elevated levels. Several Mississippi River locks were closed because of high water in late June and reopened by July 1. Barge traffic through St. Louis Harbor remains restricted to daylight only. High river levels are also preventing loading operations on the lower Illinois River. During the week ending July 4, there was no reported barge traffic on the Illinois River at LaGrange Lock and Dam (last lock on the Illinois River). Barge operators report that some loading will begin this week on the upper Illinois River, while loading operations on the lower Illinois could resume next week.

NGFA and STC to Host Second Agricultural Transportation Summit
On August 4-5, the National Grain and Feed Association (NGFA) and the Soy Transportation Coalition (STC) will host an Ag. Transportation Summit in the Chicago area. USDA's Agricultural Marketing Service is a cosponsor of the event. According to NGFA Chairman Gary Beachner, "This year's summit will focus on strategies and steps being taken to enhance capacity and efficiency within all transportation modes – highway, rail, barge and ports – to meet the continued, growing demand for moving freight to both domestic and export markets," Topics to be addressed include: inland waterways, rail, surface transportation, ports, the Panama Canal expansion, and private sector investment in infrastructure. For more on the summit, see www.soytransportation.org or http://www.ngfa.org/upcoming---events/transportation---summit/.

Diesel Fuel Prices Fall in Response to Crude Oil Prices
During the week ending July 6, diesel fuel prices decreased 1 cent per gallon and a total of 8 cents over the past 6 weeks. The Energy Information Administration (EIA) reported that June crude oil spot prices fell by $3 per barrel to a monthly average of $61 per barrel, putting downward pressure on diesel fuel prices. EIA stated, "Oil prices have been relatively stable in recent months despite consistent growth in global petroleum and other liquids inventories. Inventory builds are projected to moderate somewhat in the coming months, but are expected to remain high compared with previous years."

Grain Inspections Fall Significantly
For the week ending July 2, **total inspections of grain** (corn, wheat, soybeans) from all major export regions reached 1.38 million metric tons (mmt), down 19 percent from the past week, down 24 percent from last year, and 1 percent above the 3-year average. Soybean inspections dropped 37 percent from the previous week; corn inspections decreased by 21 percent. Inspections of wheat increased 2 percent during the same period. Mississippi Gulf grain inspections decreased 20 percent from the past week, but Pacific Northwest (PNW) grain inspections increased 13 percent as shipments to Asia rebounded.

Snapshots by Sector

Export Sales
During the week ending June 25, **unshipped balances** of wheat, corn, and soybeans totaled 17.0 mmt, down 2 percent from the same time last year. Net weekly **wheat export sales** of 0.364 mmt were down 16 percent from the prior week. **Corn export sales** of 0.594 mmt were up 20 percent from the prior week.

Rail
U.S. Class I railroads originated 19,046 **carloads of grain** during the week ending June 27, up 4 percent from last week, up 6 percent from last year, and up 6 percent from the 3-year average.

During the week ending July 2, average July shuttle **secondary railcar bids/offers per car** were $104 below tariff, up $95 from last week, and $404 lower than last year. Non-shuttle secondary railcar bids/offers were $50 below tariff, down $25 from last week, and $550 lower than last year.

Barge
During the week ending July 4, **barge grain movements** totaled 463,684 tons—about 36 percent lower than the previous week, and 33 percent lower than the same period last year.

During the week ending July 4, 282 grain barges **moved down river**, down 40 percent from last week; 515 grain barges were **unloaded in New Orleans**, down 9 percent from the previous week.

Ocean
During the week ending July 2, 30 **ocean-going grain vessels** were loaded in the Gulf, 15 percent more than the same period last year. Forty-three vessels are expected to be loaded within the next 10 days, 10 percent less than the same period last year.

During the week ending July 3, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $32 per metric ton (mt), unchanged from the previous week. The cost of shipping from the PNW to Japan was $18 per mt, unchanged from the previous week.

Fuel
During the week ending July 6, U.S. average **diesel fuel prices** decreased 1 cent from the previous week to $2.83 per gallon—down $1.08 from the same week last year

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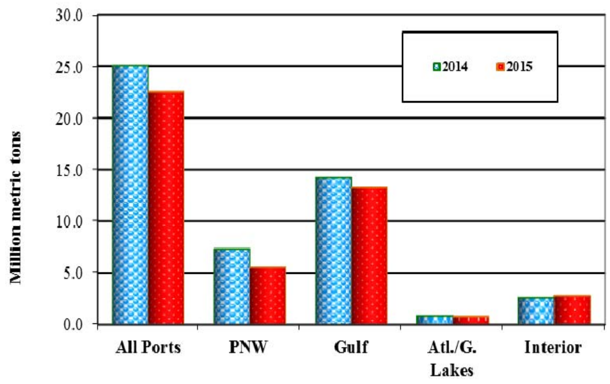
Second Quarter Total Grain Inspections Decrease; Soybean Inspections Rebound

USDA's Grain Inspection, Packers, and Stockyards Administration (GIPSA) reports that total grain inspected for export (wheat, corn, and soybeans) from all major U.S. ports is at 22.5 million metric tons (mmt) in the second quarter, which is a 10 percent drop from last quarter but is 3 percent above the 5-year average (see *figure 1*). Inspections of corn and wheat were down from the same time last year, but soybean inspections rebounded. The unshipped export sales report for soybeans indicates steady demand during the second quarter.

Grain inspections were down in each of the major export regions, with the exception of the Interior (*see figure 1*). Pacific Northwest (PNW) grain inspections reached 5.5 mmt, down 24 percent from last year and 14 percent below the 5-year average. PNW rail deliveries to ports were also down, falling 21 percent from last year during the second quarter. Rail deliveries of grain to Gulf ports decreased 10 percent during the second quarter, reflecting a 6 percent decrease in U.S. Gulf grain inspections (13.3 mmt). Second quarter Atlantic/Great Lakes inspections totaled 0.79 mmt, down 7 percent from last year, primarily because of lower corn shipments to Latin America and Africa. Interior grain inspections reached 2.8 mmt, up 9 percent from last year, and 7 percent above the 5-year average. Interior second quarter inspections of corn and wheat, shipped primarily to Mexico, increased 16 and 8 percent, respectively, from last year. Soybean inspections in the Interior decreased 5 percent from last year.

Figure 1: Second quarter grain inspections by port regions

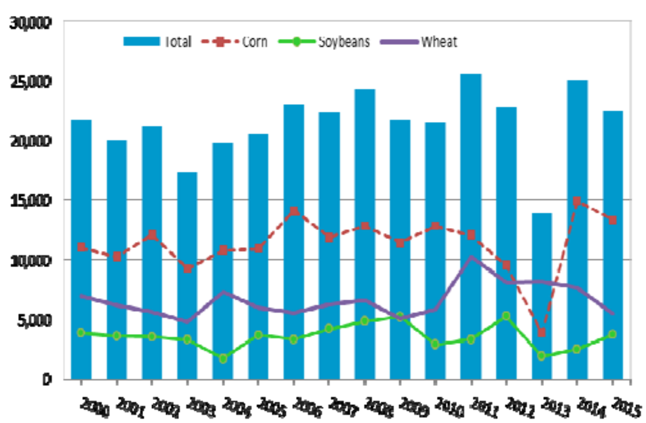


Source: USDA/GIPSA

Soybean Inspections Rebound

According to GIPSA, total second quarter soybean inspections reached 3.7 mmt, up 50 percent from last year, the highest since 2012 (*see figure 2*). Soybean inspections were 18 percent above the 5-year average, with an increase in shipments to Asia and Latin America. U.S. Gulf second quarter soybean inspections (2.3 mmt) increased 80 percent from last year, and PNW soybean inspections (0.477 mmt) increased 61 percent from last year. Soybean inspections in the Interior decreased 5 percent from last year.

Figure 2: Second Quarter Grain Inspections



Source: USDA/GIPSA

Total second quarter corn inspections, at 13.3 mmt, decreased 11 percent from last year but increased 25 percent and is above the 5-year average. PNW corn inspections reached 2.6 mmt, down 21 percent from last year, and Gulf corn inspections reached 8.9 mmt, down 10 percent from last year. Interior inspections of corn were up 16 percent from last year at 1.7 mmt. Atlantic/Great Lakes corn inspections reached 0.195 mmt, down 48 percent from last year.

Total wheat inspections reached 5.4 mmt during the second quarter, down 29 percent from last year, and 32 percent below the 5-year average (*see figure 2*). Inspections of wheat dropped as lower priced wheat in other countries, such as Europe and Russia, reduced the demand for higher-priced U.S. wheat.

Second quarter wheat inspections dropped 31 percent from last year in the Gulf (2.2 mmt), as demand from Africa and Latin America decreased. Inspections of wheat decreased 34 percent in the PNW (2.4 mmt), as shipments to Asia declined. *Johnny.Hill@ams.usda.gov*

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
Week ending		Unit Train	Shuttle		Gulf	Pacific
07/08/15	190	252	208	236	143	128
07/01/15	191	253	204	n/a	143	128

[1]Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = near-month secondary rail market bid and monthly tariff ra with fuel surcharge ($/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	7/2/2015	6/26/2015
Corn	IL--Gulf	-0.78	-0.74
Corn	NE--Gulf	-0.84	-0.78
Soybean	IA--Gulf	-1.30	-1.15
HRW	KS--Gulf	-1.12	-1.14
HRS	ND--Portland	-2.12	-1.69

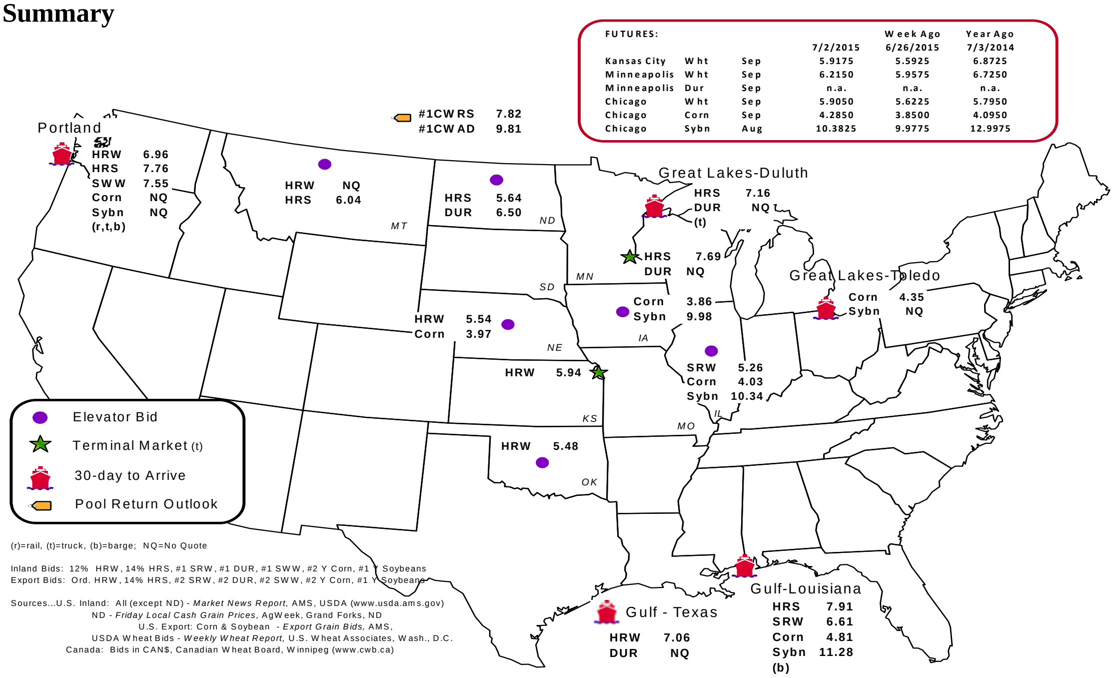
Note: nq = no quote

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



(r)=rail, (t)=truck, (b)=barge; NQ=No Quote

Inland Bids: 12% HRW, 14% HRS, #1 SRW, #1 DUR, #1 SWW, #2 Y Corn, #1 Y Soybeans
Export Bids: Ord. HRW, 14% HRS, #2 SRW, #2 DUR, #2 SWW, #2 Y Corn, #1 Y Soybeans

Sources...U.S. Inland: All (except ND) - *Market News Report*, AMS, USDA (www.usda.ams.gov)
ND - *Friday Local Cash Grain Prices*, AgWeek, Grand Forks, ND
U.S. Export: Corn & Soybean - *Export Grain Bids*, AMS,
USDA Wheat Bids - *Weekly Wheat Report*, U.S. Wheat Associates, Wash., D.C.
Canada: Bids in CAN$, Canadian Wheat Board, Winnipeg (www.cwb.ca)

Rail Transportation

Table 3

Rail Deliveries to Port (carloads)[1]

Week ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-Border Mexico[3]
7/01/2015[p]	573	278	2,956	242	4,049	6/27/2015	2,346
6/24/2015[r]	213	985	3,112	404	4,623	6/20/2015	1,724
2015 YTD[r]	11,599	34,391	114,322	13,355	173,667	2015 YTD	45,784
2014 YTD[r]	20,274	44,299	122,814	15,727	203,114	2014 YTD	49,740
2015 YTD as % of 2014 YTD	57	78	93	85	86	% change YTD	92
Last 4 weeks as % of 2014[2]	766	64	78	184	81	Last 4wks % 2014	92
Last 4 weeks as % of 4-year avg.[2]	213	68	97	153	94	Last 4wks % 4 yr	117
Total 2014	44,621	83,674	256,670	32,107	417,072	Total 2014	96,467
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	71,397

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2013 and prior 4-year average.

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

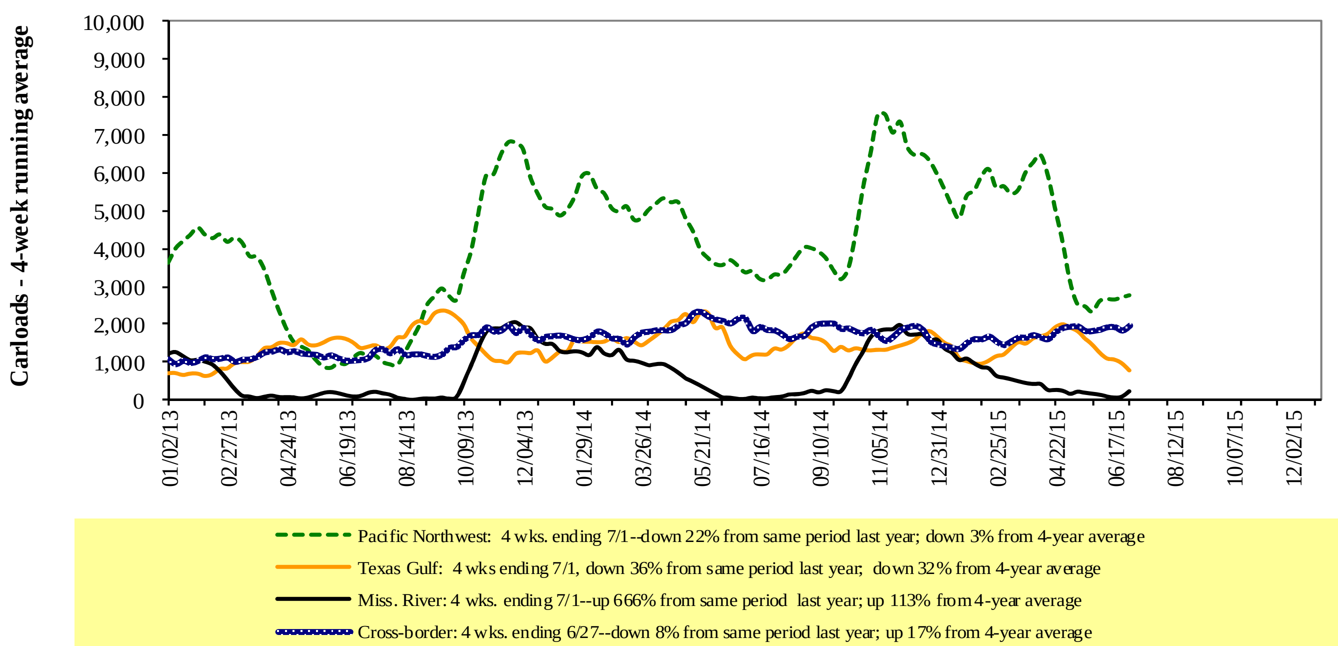
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

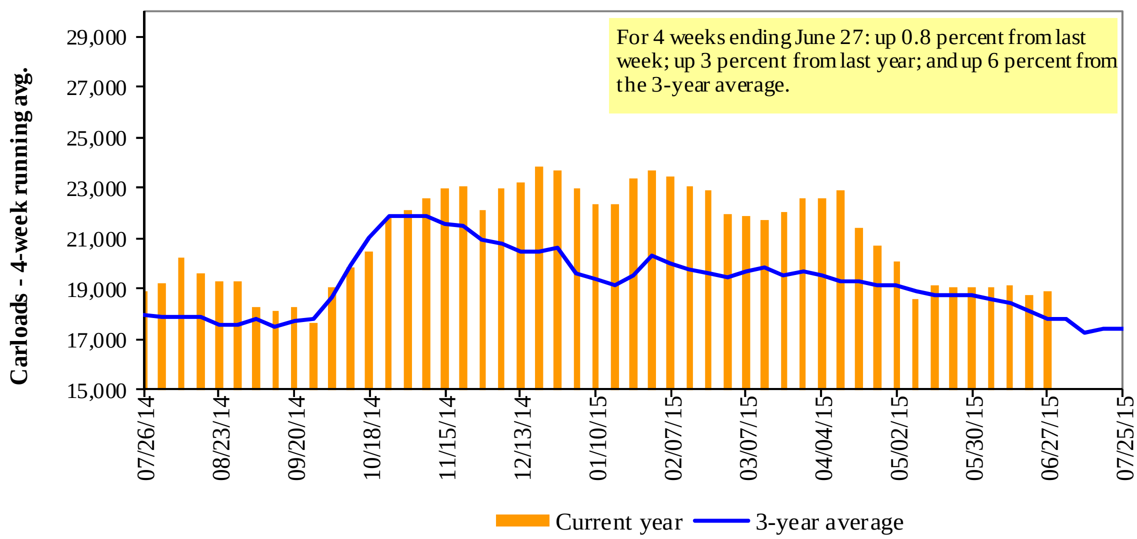
Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
06/27/15	2,248	2,655	8,044	725	5,374	19,046	4,197	5,253
This week last year	2,061	3,013	7,555	816	4,558	18,003	4,526	5,798
2015 YTD	51,665	76,223	246,522	21,932	129,622	525,964	103,938	110,250
2014 YTD	47,627	74,281	220,047	21,870	142,189	506,014	110,445	132,728
2015 YTD as % of 2014 YTD	108	103	112	100	91	104	94	83
Last 4 weeks as % of 2014[1]	91	103	107	134	98	103	91	87
Last 4 weeks as % of 3-yr avg.[2]	109	106	103	157	103	106	118	104
Total 2014	103,331	153,771	482,431	47,510	297,969	1,085,012	242,616	276,322

[1]The past 4 weeks of this year as a percent of the same 4 weeks last year.

[2]The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date.

Figure 3

Total Weekly U.S. Class I Railroad Grain Car Loadings



Source: Association of American Railroads

Table 5

Railcar Auction Offerings[1] ($/car)[2]

Week ending 7/2/2015	Delivery period							
	Jul-15	Jul-14	Aug-15	Aug-14	Sep-15	Sep-14	Oct-15	Oct-14
BNSF[3]								
COT grain units	3	no offer	5	1517	10	no offer	29	no offer
COT grain single-car[5]	0 . . 7	no offer	0 . . 17	1611..2000	0 . . 7	no offer	0 . . 3	no offer
UP[4]								
GCAS/Region 1	no bids	no offer	no bids	40	no bids	no offer	n/a	n/a
GCAS/Region 2	no bids	no offer	no bids	229	no bids	no offer	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.

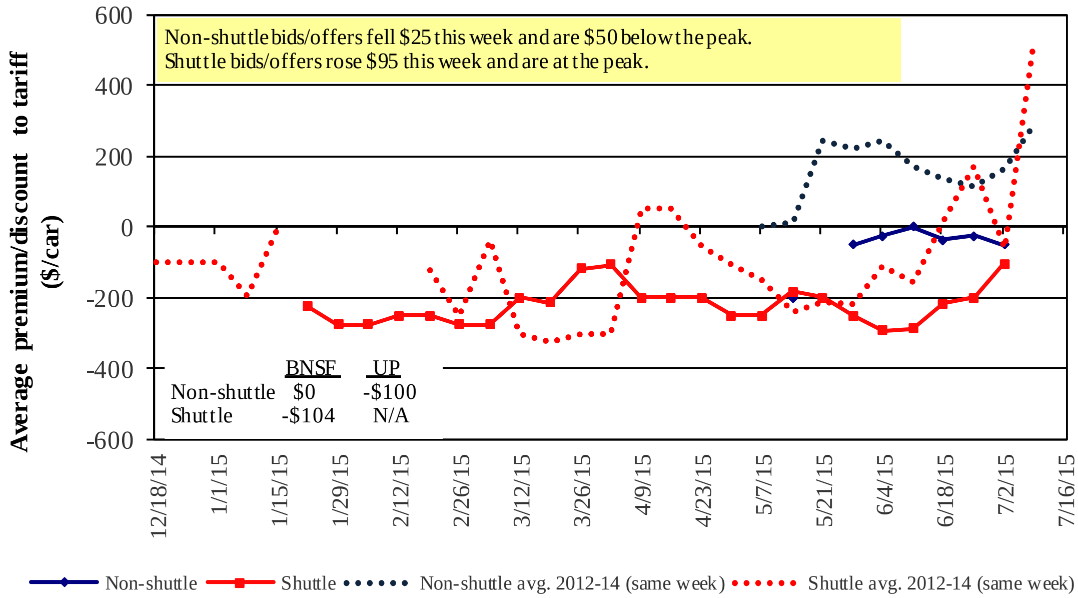
[5]Range is shown because average is not available. Not available = n/a.

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 July 2015, Secondary Market

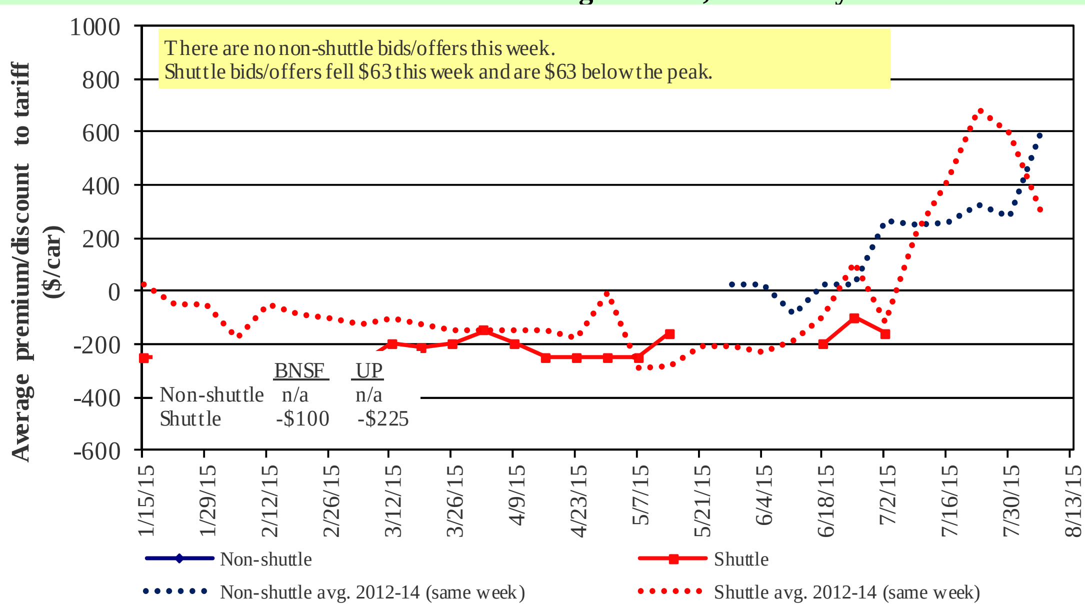


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in August 2015, Secondary Market

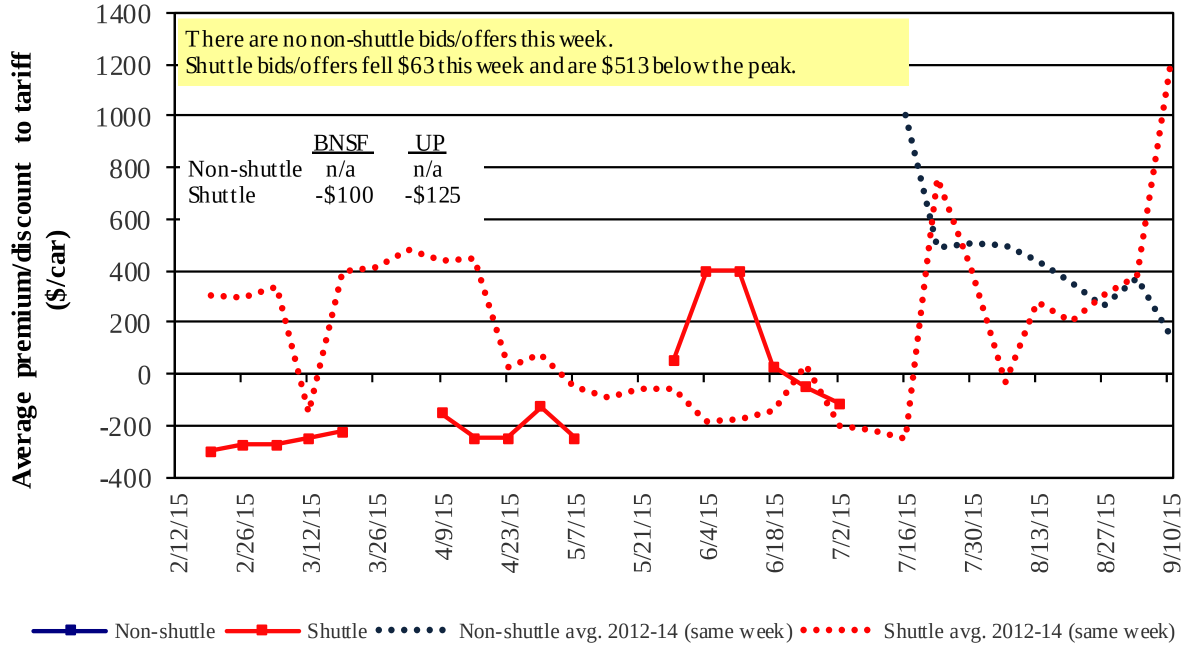


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in September 2015, Secondary Market



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 6

Weekly Secondary Railcar Market ($/car)[1]

Week ending 7/2/2015	Delivery period Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15
Non-shuttle						
BNSF-GF	-	n/a	n/a	n/a	n/a	n/a
Change from last week	-	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	(800)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(100)	n/a	n/a	n/a	n/a	n/a
Change from last week	(50)	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	(300)	n/a	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	(104)	(100)	(100)	650	n/a	n/a
Change from last week	93	n/a	(200)	(150)	n/a	n/a
Change from same week 2014	(504)	n/a	n/a	n/a	n/a	n/a
UP-Pool	n/a	(225)	(125)	n/a	n/a	n/a
Change from last week	n/a	(125)	75	n/a	n/a	n/a
Change from same week 2014	n/a	(425)	n/a	n/a	n/a	n/a

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

[2]Shuttle bids are a new data series; prior to this we provided only non-shuttle rates.

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,
n/a = not available; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

Data from 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: 7/1/2015	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	$81	$36.60	$1.00	3
	Grand Forks, ND	Duluth-Superior, MN	$4,143	$30	$41.44	$1.13	13
	Wichita, KS	Los Angeles, CA	$6,950	$153	$70.54	$1.92	4
	Wichita, KS	New Orleans, LA	$4,243	$142	$43.55	$1.19	1
	Sioux Falls, SD	Galveston-Houston, TX	$6,486	$126	$65.66	$1.79	5
	Northwest KS	Galveston-Houston, TX	$4,511	$156	$46.35	$1.26	0
	Amarillo, TX	Los Angeles, CA	$4,710	$217	$48.93	$1.33	-1
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,328	$161	$34.65	$0.88	-2
	Toledo, OH	Raleigh, NC	$5,555	$199	$57.14	$1.45	13
	Des Moines, IA	Davenport, IA	$2,168	$34	$21.87	$0.56	2
	Indianapolis, IN	Atlanta, GA	$4,761	$150	$48.76	$1.24	12
	Indianapolis, IN	Knoxville, TN	$4,104	$96	$41.71	$1.06	14
	Des Moines, IA	Little Rock, AR	$3,308	$100	$33.84	$0.86	-1
	Des Moines, IA	Los Angeles, CA	$4,852	$292	$51.08	$1.30	-13
Soybeans	Minneapolis, MN	New Orleans, LA	$3,719	$149	$38.41	$1.05	1
	Toledo, OH	Huntsville, AL	$4,676	$141	$47.84	$1.30	21
	Indianapolis, IN	Raleigh, NC	$5,625	$201	$57.85	$1.57	12
	Indianapolis, IN	Huntsville, AL	$4,368	$96	$44.33	$1.21	25
	Champaign-Urbana, IL	New Orleans, LA	$3,974	$161	$41.06	$1.12	0
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,953	$88	$40.13	$1.09	1
	Wichita, KS	Galveston-Houston, TX	$3,919	$69	$39.60	$1.08	7
	Chicago, IL	Albany, NY	$4,723	$187	$48.76	$1.33	13
	Grand Forks, ND	Portland, OR	$5,611	$152	$57.23	$1.56	1
	Grand Forks, ND	Galveston-Houston, TX	$6,532	$158	$66.44	$1.81	0
	Northwest KS	Portland, OR	$5,478	$256	$56.94	$1.55	-2
Corn	Minneapolis, MN	Portland, OR	$5,180	$185	$53.28	$1.35	-6
	Sioux Falls, SD	Tacoma, WA	$5,130	$170	$52.63	$1.34	-5
	Champaign-Urbana, IL	New Orleans, LA	$3,147	$161	$32.85	$0.83	-2
	Lincoln, NE	Galveston-Houston, TX	$3,610	$99	$36.83	$0.94	-4
	Des Moines, IA	Amarillo, TX	$3,690	$126	$37.89	$0.96	-2
	Minneapolis, MN	Tacoma, WA	$5,180	$184	$53.26	$1.35	-6
	Council Bluffs, IA	Stockton, CA	$4,600	$190	$47.57	$1.21	-6
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,690	$170	$58.19	$1.58	-5
	Minneapolis, MN	Portland, OR	$5,710	$185	$58.54	$1.59	-5
	Fargo, ND	Tacoma, WA	$5,580	$151	$56.91	$1.55	-4
	Council Bluffs, IA	New Orleans, LA	$4,425	$186	$45.79	$1.25	0
	Toledo, OH	Huntsville, AL	$3,851	$141	$39.65	$1.08	26
	Grand Island, NE	Portland, OR	$5,360	$262	$55.83	$1.52	-2

[1]A unit train refers to shipments of at least 25 cars. Shuttle train rates are available for qualified shipments of 75-120 cars that meet railroad efficiency requirements.

[2]Approximate load per car = 111 short tons (100.7 metric tons): corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

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

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

*Regional economic areas defined by the Bureau of Economic Analysis (BEA)

Table 8

Tariff Rail Rates for U.S. Bulk Grain Shipments to Mexico

Commodity	Origin state	Destination region	Tariff rate/car[1]	Fuel surcharge per car[2]	Tariff plus surcharge per: metric ton[3]	Tariff plus surcharge per: bushel[3]	Percent change Y/Y[4]
Effective date: 7/1/2015							
Wheat	MT	Chihuahua, CI	$7,599	$161	$79.29	$2.16	10
	OK	Cuautitlan, EM	$6,714	$195	$70.59	$1.92	-2
	KS	Guadalajara, JA	$7,159	$189	$75.07	$2.04	-3
	TX	Salinas Victoria, NL	$4,086	$74	$42.50	$1.16	2
Corn	IA	Guadalajara, JA	$8,427	$222	$88.37	$2.24	-2
	SD	Celaya, GJ	$7,780	$210	$81.64	$2.07	-5
	NE	Queretaro, QA	$7,618	$197	$79.86	$2.03	-3
	SD	Salinas Victoria, NL	$6,035	$160	$63.30	$1.61	-4
	MO	Tlalnepantla, EM	$6,963	$192	$73.11	$1.86	-4
	SD	Torreon, CU	$7,050	$176	$73.83	$1.87	-2
Soybeans	MO	Bojay (Tula), HG	$8,365	$187	$87.38	$2.38	0
	NE	Guadalajara, JA	$8,929	$214	$93.42	$2.54	-1
	IA	El Castillo, JA	$9,270	$209	$96.85	$2.63	-2
	KS	Torreon, CU	$7,226	$133	$75.19	$2.04	0
Sorghum	TX	Guadalajara, JA	$7,150	$137	$74.45	$1.89	-2
	NE	Celaya, GJ	$7,404	$191	$77.60	$1.97	-4
	KS	Queretaro, QA	$7,255	$120	$75.35	$1.91	4
	NE	Salinas Victoria, NL	$5,883	$141	$61.54	$1.56	2
	NE	Torreon, CU	$6,662	$157	$69.67	$1.77	0

[1]Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75--110 cars that meet railroad efficiency requirements.

[2]Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

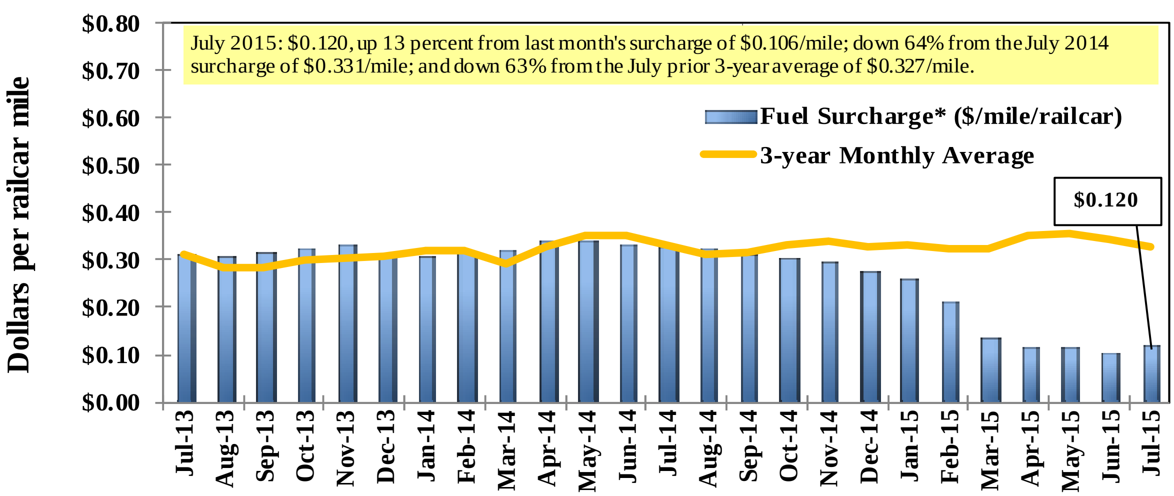
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

Sources: www.bnsf.com, www.uprr.com, www.kcsouthern.com

Figure 7

Railroad Fuel Surcharges, North American Weighted Average[1]



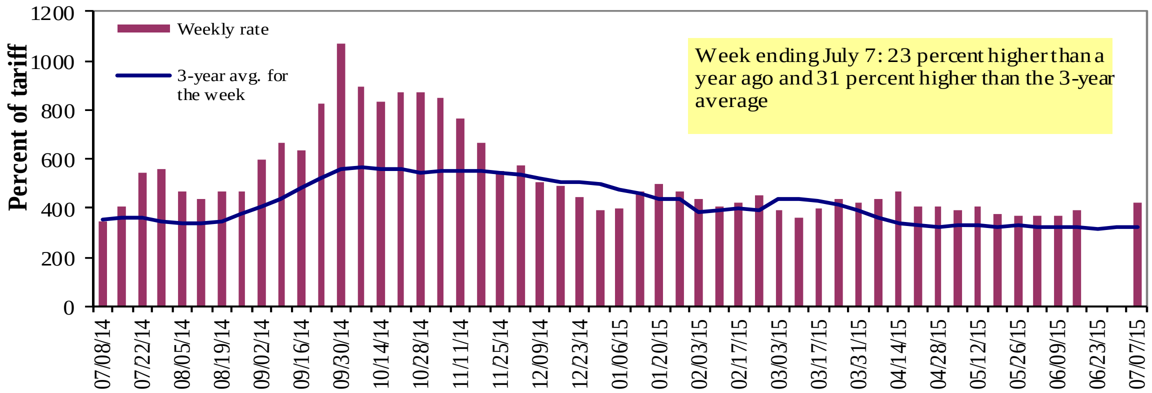
[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.
* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.
** BNSF strike price (diesel price when fuel surcharges begin) changed from $1.25/gal. to $2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was $0.227/mile instead of $0.331/mile.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

Barge Transportation

Figure 8

Illinois River Barge Freight Rate[1,2]



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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]	7/7/2015	510	436	425	300	325	325	234
	6/30/2015	552	458	-	330	353	353	262
$/ton	7/7/2015	31.57	23.20	19.72	11.97	15.24	13.13	7.35
	6/30/2015	34.17	24.37	-	13.17	16.56	14.26	8.23
Current week % change from the same week:								
	Last year	-	-	23	22	34	34	13
	3-year avg. [2]	20	54	31	20	37	37	13
Rate[1]	August	508	458	458	400	445	445	338
	October	705	700	700	650	718	718	623

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; missing data due to 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.

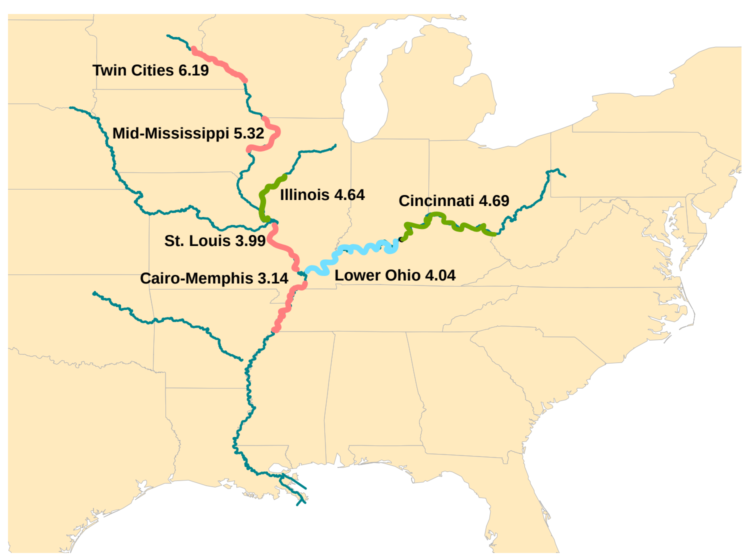
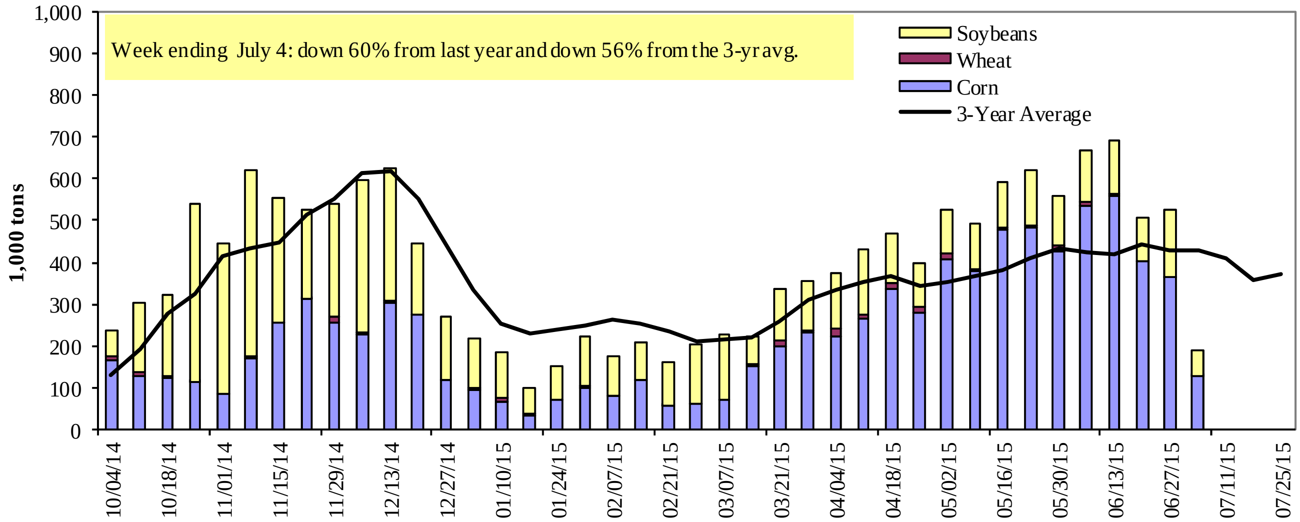


Figure 10

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)

Week ending 07/04/2015	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	143	2	99	2	245
Winfield, MO (L25)	196	2	64	1	264
Alton, IL (L26)	136	2	37	1	175
Granite City, IL (L27)	128	2	58	3	190
Illinois River (L8)	0	0	0	0	0
Ohio River (L52)	177	43	44	0	263
Arkansas River (L1)	0	4	6	0	10
Weekly total - 2015	305	49	107	3	464
Weekly total - 2014	539	106	44	5	693
2015 YTD[1]	10,618	733	5,316	124	16,790
2014 YTD	11,913	1,066	4,348	112	17,439
2015 as % of 2014 YTD	89	69	122	111	96
Last 4 weeks as % of 2014[2]	81	63	253	158	94
Total 2014	20,693	2,181	11,813	258	34,946

[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.

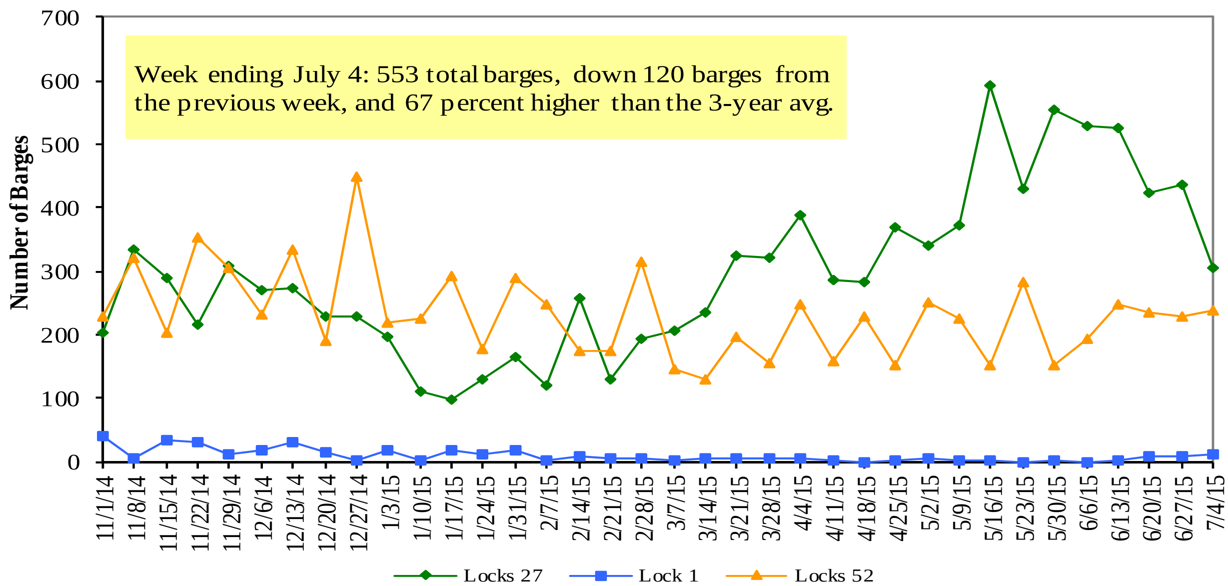
[2] As a percent of same period in 2014.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers

Figure 11

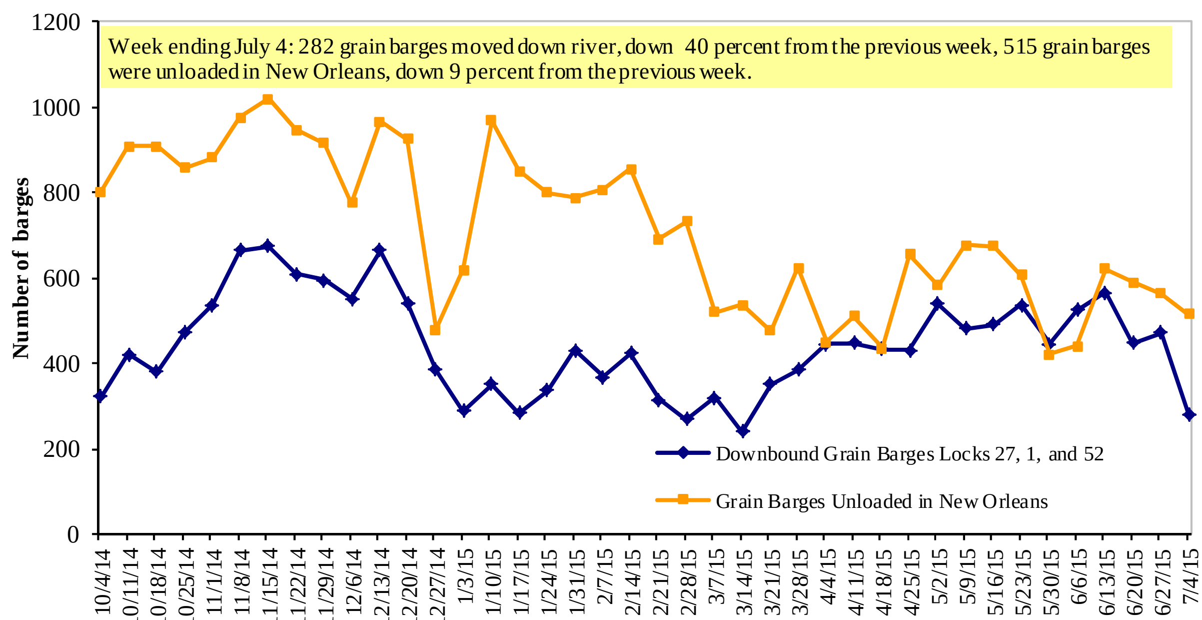
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 7/06/2014 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.938	-0.016	-1.040
	New England	3.060	-0.011	-1.038
	Central Atlantic	3.073	-0.021	-0.996
	Lower Atlantic	2.810	-0.013	-1.072
II	Midwest[2]	2.724	-0.007	-1.138
III	Gulf Coast[3]	2.712	-0.018	-1.090
IV	Rocky Mountain	2.785	0.009	-1.124
V	West Coast	3.069	0.001	-0.998
	West Coast less California	2.978	0.000	-1.007
	California	3.142	0.001	-0.993
Total	U.S.	2.832	-0.011	-1.081

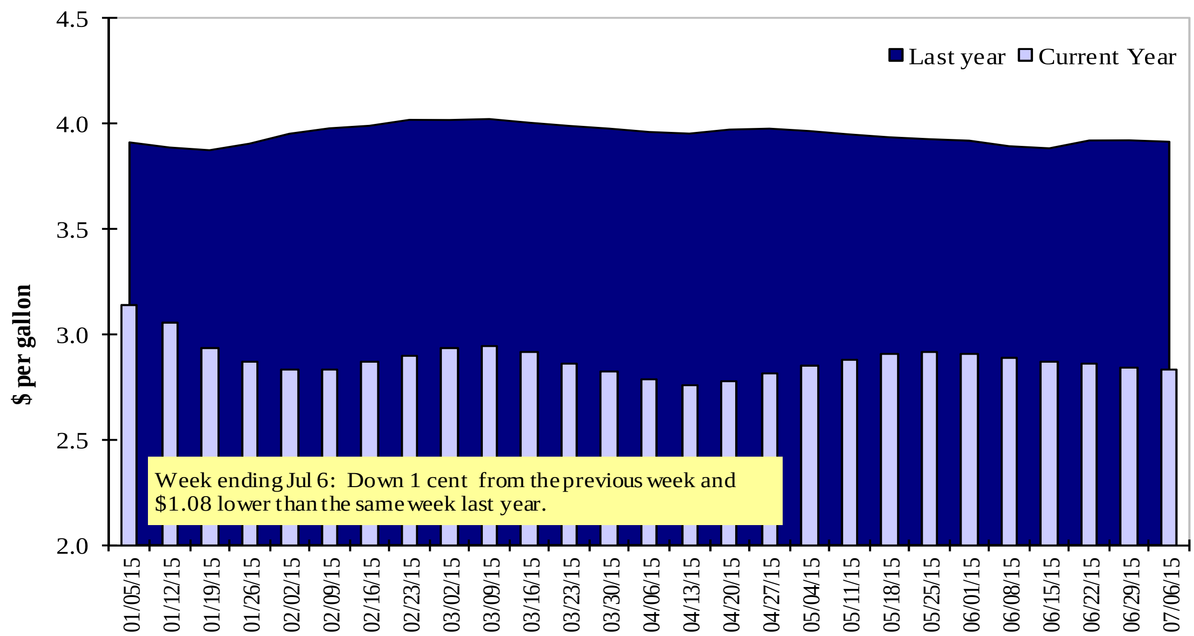
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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
Week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances[1]									
6/25/2015	1,368	919	1,373	858	201	4,718	9,459	2,849	17,026
This week year ago	1,705	1,118	2,170	927	134	6,054	9,252	2,023	17,329
Cumulative exports-marketing year[2]									
2014/15 YTD	407	187	291	163	79	1,127	36,216	47,656	84,999
2013/14 YTD	646	163	613	321	32	1,775	37,961	43,493	83,229
YTD 2014/15 as % of 2013/14	63	115	47	51	247	63	95	110	102
Last 4 wks as % of same period 2013/14	80	84	62	91	140	77	110	155	104
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293

[1] Current unshipped export sales to date

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

Note: YTD = year-to-date. Marketing Year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31

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

Table 13

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

Week ending 06/25/2015	**Total Commitments**[2]			**% change**	**Exports**[3]
	2015/16	**2014/15**	**2013/14**	**current MY**	**3-year avg**
	Next MY	**Current MY**	**Last MY**	**from last MY**	**2011-2013**
		- 1,000 mt -			**- 1,000 mt -**
Japan	586	11,148	10,803	3	10,079
Mexico	1,481	10,518	10,377	1	8,145
Korea	0	3,470	4,257	(18)	2,965
Colombia	0	4,133	3,101	33	3,461
Taiwan	0	2,001	1,848	8	1,238
Top 5 Importers	**2,067**	**31,269**	**30,386**	**3**	**25,887**
Total US corn export sales	**3,069**	**45,675**	**47,213**	**(3)**	**34,445**
% of Projected	6%	99%	97%		
Change from prior week	**239**	**594**	**291**		
Top 5 importers' share of U.S. corn export sales	67%	68%	64%		75%
USDA forecast, June 2015	**48,260**	**46,360**	**48,700**	**(5)**	
Corn Use for Ethanol USDA forecast, June 2015	**132,080**	**131,445**	**130,404**	**1**	

(n) indicates negative number.

[1]Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

[2]Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--http://www.fas.usda.gov/esrquery/

[3]FAS Marketing Year Ranking Reports - http://apps.fas.usda.gov/export-sales/myrkaug.htm; 3-yr average

Table 14

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

Week Ending 06/25/2015	Total Commitments[2] 2015/16 Next MY	2014/15 Current MY	2013/14 Last MY	% change current MY from last MY	Exports[3] 3-yr avg. 2011-13
		- 1,000 mt -			- 1,000 mt -
China	2,435	29,983	27,599	9	24,211
Mexico	465	3,363	3,276	3	2,971
Indonesia	0	1,767	2,277	(22)	1,895
Japan	227	2,041	1,868	9	1,750
Taiwan	0	1,256	1,195	5	1,055
Top 5 importers	**3,127**	**38,410**	**36,215**	**6**	**31,882**
Total US soybean export sales	**6,017**	**50,505**	**45,516**	**11**	**39,169**
% of Projected	12%	103%	102%		
Change from prior week	1	(10)	41		
Top 5 importers' share of U.S. soybean export sales	52%	76%	80%		**81%**
USDA forecast, June 2015	**48,310**	**49,260**	**44,820**	**10**	

(n) indicates negative number.

[1]Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

[2]Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--http://www.fas.usda.gov/esrquery/

[3] FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers[1] of All U.S. Wheat

Week Ending 06/25/2015	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	436	783	(44)	3,113
Mexico	570	979	(42)	2,807
Nigeria	644	460	40	2,512
Philippines	412	591	(30)	2,105
Brazil	143	901	(84)	2,091
Korea	376	483	(22)	1,273
Taiwan	289	301	(4)	1,007
Indonesia	46	259	(82)	751
Colombia	126	156	(19)	662
Thailand	84	99		618
Top 10 importers	**3,043**	**4,911**	**(38)**	**16,939**
Total US wheat export sales	**5,846**	**7,829**	**(25)**	**26,361**
% of Projected	23%	34%		
Change from prior week	364	567		
Top 10 importers' share of U.S. wheat export sales	52%	63%		64%
USDA forecast, June 2015	**25,170**	**23,270**	**8**	

(n) indicates negative number.

[1] Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31

[2] Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--http://www.fas.usda.gov/esrquery/

[3] FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 16

Grain Inspections for Export by U.S. Port Region (1,000 metric tons)

Port regions	Week ending 07/02/15	Previous Week[1]	Current Week as % of Previous	2015 YTD[1]	2014 YTD[1]	2015 YTD as % of 2014 YTD	Last 4-weeks as % of		Total[1] 2014
							2014	3-yr. avg.	
Pacific Northwest									
Wheat	83	154	54	5,502	6,685	82	54	68	12,436
Corn	223	117	190	4,948	4,595	108	94	150	7,781
Soybeans	0	0	n/a	4,054	4,486	90	76	9	12,887
Total	**306**	**272**	**113**	**14,504**	**15,766**	**92**	**73**	**94**	**33,104**
Mississippi Gulf									
Wheat	180	48	375	2,132	2,256	94	93	63	4,495
Corn	474	723	66	15,466	16,959	91	99	154	30,912
Soybeans	172	259	66	10,866	10,130	107	293	168	29,087
Total	**826**	**1,030**	**80**	**28,464**	**29,345**	**97**	**113**	**137**	**64,495**
Texas Gulf									
Wheat	35	99	35	2,028	3,467	58	54	41	6,120
Corn	0	32	0	301	346	87	89	297	580
Soybeans	0	0	n/a	210	257	82	n/a	0	949
Total	**35**	**131**	**26**	**2,539**	**4,070**	**62**	**57**	**49**	**7,649**
Interior									
Wheat	33	43	78	693	637	109	171	145	1,400
Corn	97	135	72	3,083	2,806	110	70	143	5,677
Soybeans	18	46	39	1,726	2,044	84	98	92	4,312
Total	**148**	**224**	**66**	**5,502**	**5,488**	**100**	**156**	**132**	**11,389**
Great Lakes									
Wheat	21	0	n/a	257	248	104	82	132	935
Corn	0	0	n/a	137	41	330	n/a	284	288
Soybeans	0	0	n/a	66	51	130	0	0	988
Total	**21**	**0**	**n/a**	**460**	**340**	**135**	**93**	**135**	**2,211**
Atlantic									
Wheat	36	35	104	308	157	196	531	388	553
Corn	5	5	102	82	372	22	33	62	816
Soybeans	4	4	118	919	989	93	218	74	2,119
Total	**45**	**43**	**105**	**1,309[1]**	**1,518**	**86**	**171**	**169**	**3,487**
U.S. total from ports[2]									
Wheat	388	379	102	10,920	13,451	81	70	67	25,939
Corn	799	1,011	79	24,016	25,119	96	98	152	46,054
Soybeans	194	309	63	17,841	17,959	99	192	117	50,342
Total	**1,382**	**1,699**	**81**	**52,778**	**56,529**	**93**	**96**	**113**	**122,335**

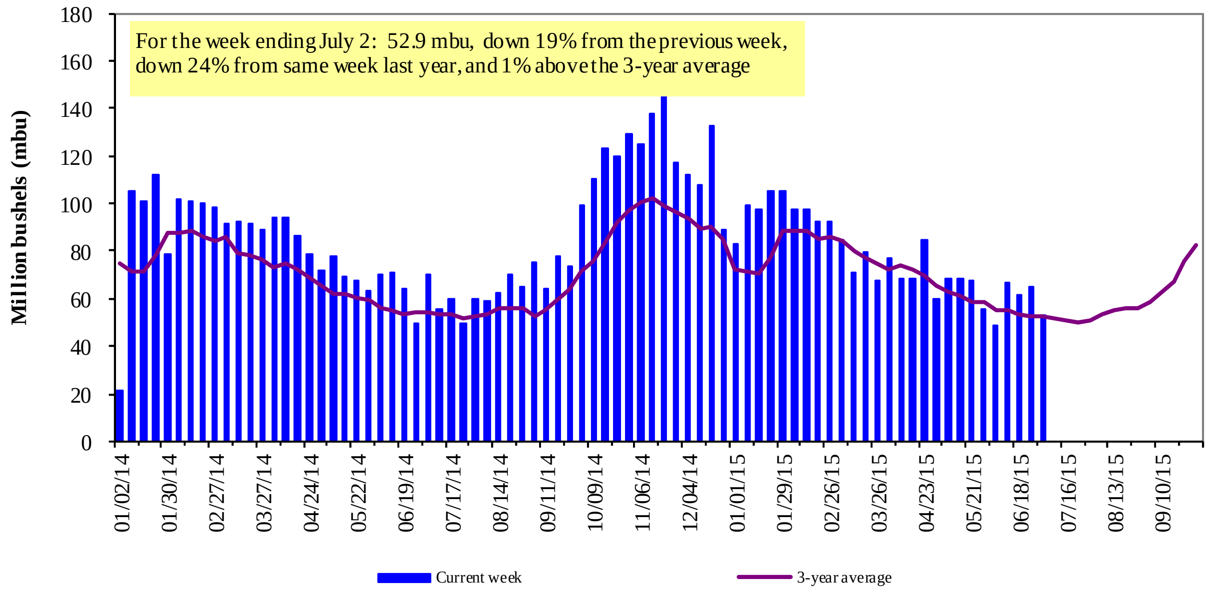
[1] Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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 2014.

Figure 14

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

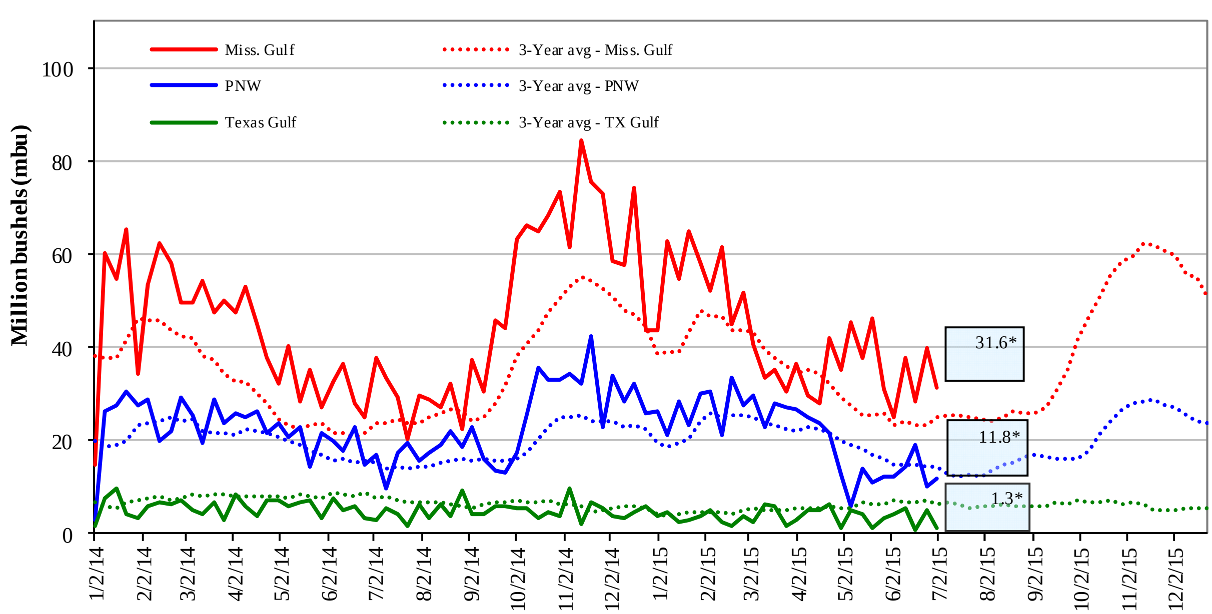


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

July 2: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 21	down 74	down 26	up 15
Last year (same week)	down 17	down 56	down 20	down 31
3-yr avg. (4-wk mov. avg.	up 26	down 81	up 4	down 15

Ocean Transportation

Table 17

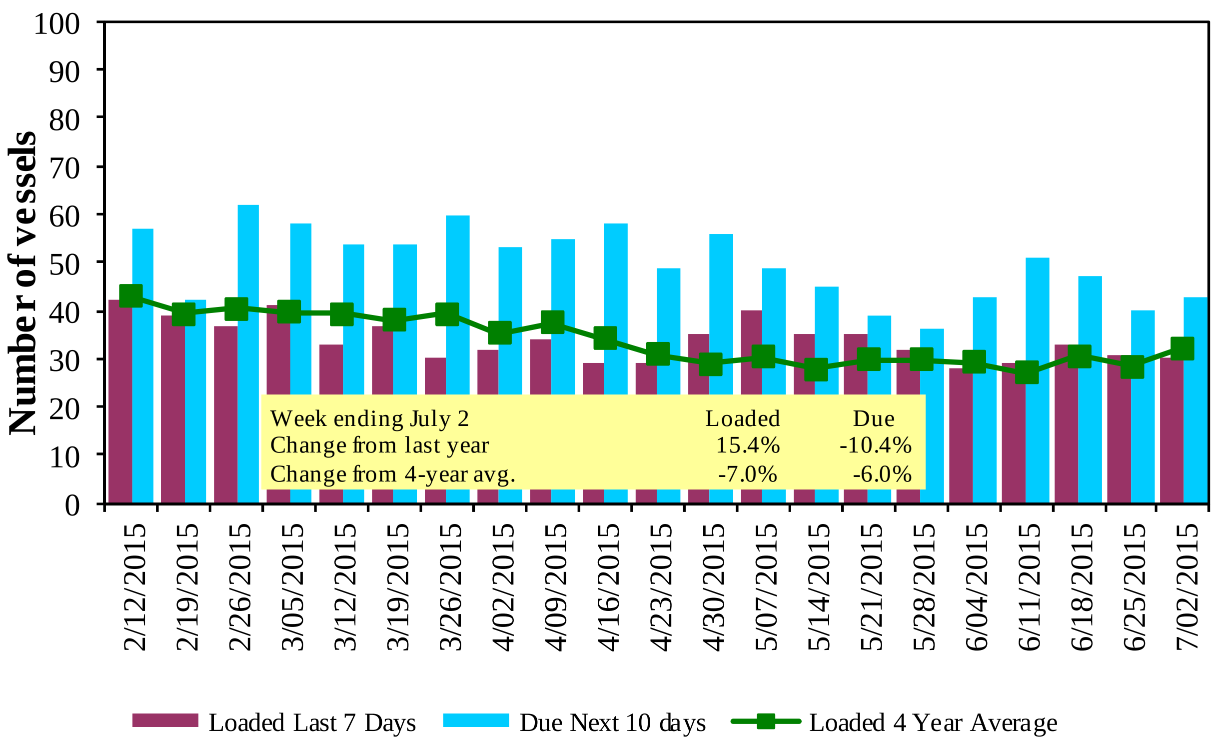
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
7/2/2015	34	30	43	9	n/a
6/25/2015	39	31	40	9	n/a
2014 range	(18..88)	(24..52)	(27..97)	(6..26)	n/a
2014 avg.	47	39	60	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

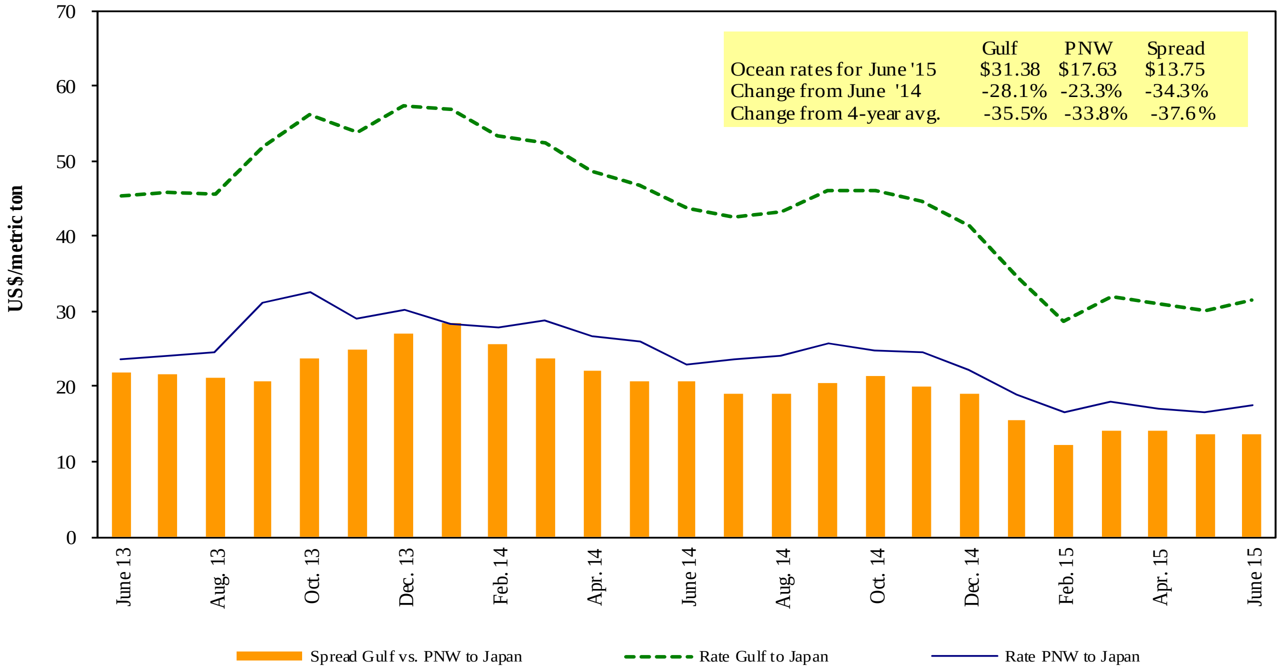
U.S. Gulf[1] Vessel Loading Activity



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 7/4/2015

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Jul 10/15	53,000	31.75
U.S. Gulf	China	Grain	Jun 1/10	50,000	35.75
U.S. Gulf	Guatemala[1]	Corn	Jul 20/30	10,000	108.18
PNW	China	Heavy Grain	Jun 1/10	60,000	14.00
Brazil	China	Grain	Aug 1/30	60,000	23.25
Brazil	China	Heavy Grain	Jul 10/15	60,000	24.75
Brazil	China	Heavy Grain	Jul 1/10	60,000	22.75
Brazil	China	Heavy Grain	Jun 25/30	60,000	26.00
Brazil	China	Heavy Grain	Jun 20/30	60,000	21.50
Brazil	China	Heavy Grain	Jun 20/30	60,000	21.75
Brazil	China	Heavy Grain	Jun 10/20	60,000	22.25
Brazil	China	Heavy Grain	Jun 10/19	60,000	22.00
Brazil	China	Grain	Jun 15/25	60,000	21.65
Brazil	Egypt Med	Corn	Jul 5/15	50,000	19.50
River Plate	South Africa	Corn	Jul 1/10	25,000	24.25
River Plate	Vietnam	Corn	Jun 13/18	60,000	30.00
Thailand	Senegal	Rice Bggd	Jun 11/16	23,000	34.00
Uruguay	Syria	Soybean Meal	Jun 10/15	26,000	38.80

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

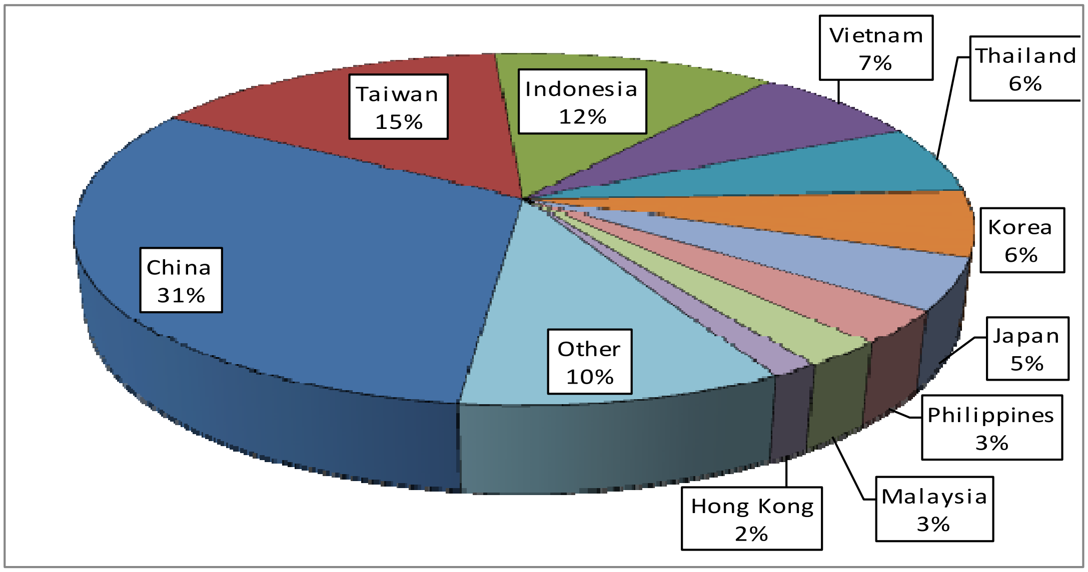
[1]50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2013, containers were used to transport 10 percent of total U.S. waterborne grain exports, up 2 percentage points from 2012. Approximately 61 percent of U.S. waterborne grain exports in 2013 went to Asia, of which 16 percent were moved in containers. Asia is the top destination for U.S. containerized grain exports—97 percent in 2013.

Figure 18

Top 10 Destination Markets for U.S. Containerized Grain Exports, January-December 2014

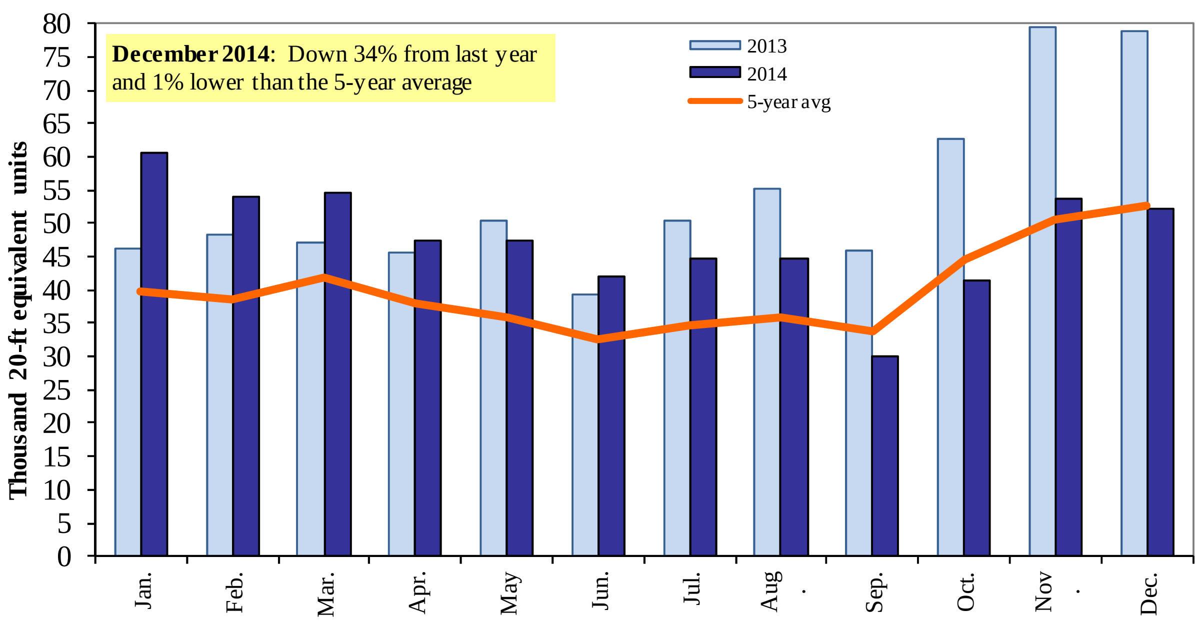


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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