



Grain Transportation Report

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

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December 17, 2015

WEEKLY HIGHLIGHTS

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USDA Releases Early Report on 2016 Agricultural Projections to 2025

On December 11, USDA released selected tables from its upcoming *USDA Agricultural Projections to 2025* report that will be released in February 2016. USDA posted online tables containing long-term supply, use, and price projections to 2025 for major crops and livestock products. The projections use the short-term projections from the November 2015 World Agricultural Supply and Demand Estimates report as a starting point. The early-release tables are in MS Excel format and posted to the Office of the Chief Economist's (OCE) website at www.usda.gov/oce. USDA's long-term agricultural projections are developed through a consensus of departmental agencies involved and are provided as a long-term representative scenario for the agricultural sector for the next decade. The projections can be useful to agricultural shippers in anticipating future transportation demand patterns for agricultural products.

Flooding Returns to Portions of the River System

Recent rains have caused minor flooding conditions on the Upper Mississippi, Arkansas, and Tennessee Rivers. On December 16, the Mississippi River at St. Louis rose above 25 feet, a threshold where the Coast Guard restricts tows of barges greater than 600 feet to daylight-only transit in the St. Louis Harbor and requires tow boats to have minimum horsepower requirements. However, year-to-date barge shipments amounted to 33.2 million tons, about the same as last year, but 15 percent higher than the 5-year average. Barge rates continue to decline as barge demand has been weak. St. Louis export barge rates have dropped from 535 percent of tariff (\$21.35 per ton) in late September to 190 percent of tariff (\$7.58 per ton) on December 15.

Wheat Inspections Highest Since Early October

For the week ending December 10, total inspections of wheat for export from all major export regions reached .458 million metric tons (mmt), up 93 percent from the past week and 75 percent above the same time last year. Wheat inspections were the highest since early October, with shipments increasing to Africa and Latin America. Total corn inspections increased 3 percent from the previous week, but soybean inspections dropped 19 percent as shipments to Asia declined. **Total inspections of grain** (corn, wheat, soybeans) for export from all major export regions reached 2.43 mmt, down 4 percent from the past week, 19 percent below last year, and 9 percent below the 3-year average. Mississippi Gulf grain inspections decreased 2 percent from the past week, and Pacific Northwest inspections decreased 30 percent. Outstanding export sales for the past week increased for wheat and corn but decreased for soybeans.

Snapshots by Sector

Export Sales

During the week ending December 3, **unshipped balances** of wheat, corn, and soybeans totaled 28.7 mmt, down 21 percent from last year. Net weekly **wheat export sales** of .225 mmt were down 43 percent from the previous week. Net **corn export sales** were 1.10 mmt, up 119 percent from the previous week, and net **soybean export sales** of 1.45 mmt, up 66 percent from the past week.

Rail

U.S. Class I railroads originated 23,045 **carloads of grain** for the week ending December 5, up 24 percent from the previous week, down 11 percent from last year, and up 8 percent from the 3-year average.

Average December shuttle **secondary railcar bids/offers** per car were \$131 below tariff for the week ending December 10, up \$94 from last week, and \$6 higher than last year. Non-shuttle secondary railcar bids/offers were \$119 below tariff, up \$19 from last week. There were no non-shuttle secondary railcar bids/offers this time last year.

Barge

For the week ending December 12, **barge grain movements** totaled 783,351 tons, nearly the same as last week, and down 25 percent from the same period last year.

For the week ending December 12, 528 grain barges **moved down river**, up 6 percent from last week; 957 grain barges were **unloaded in New Orleans**, up 11 percent from the previous week.

Ocean

For the week ending December 10, 49 **ocean-going grain vessels** were loaded in the Gulf, the same as last year. Sixty-nine vessels are expected to be loaded within the next 10 days, 6 percent less than last year.

For the week ending December 10, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$25.50 per metric ton (mt), down 4 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$14.00 per mt, down 3 percent from the previous week.

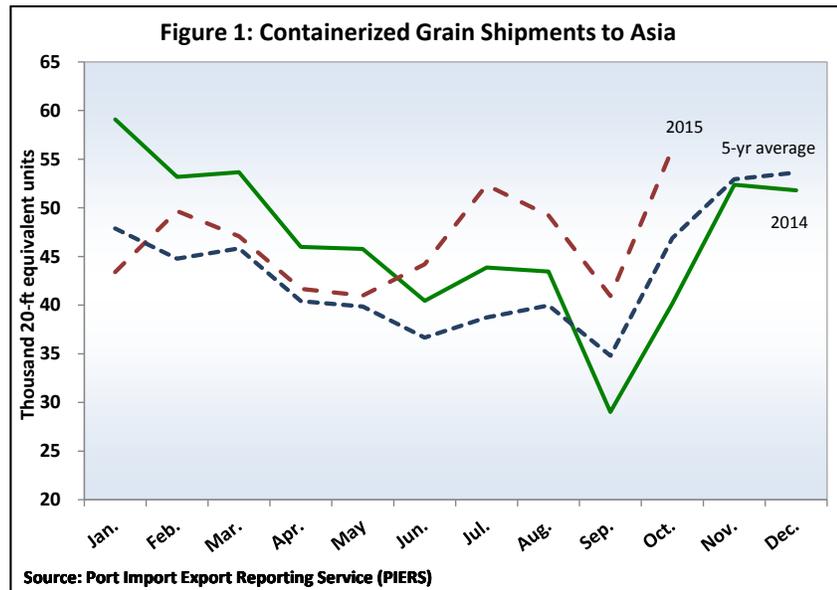
Fuel

During the week ending December 14, U.S. average **diesel fuel prices** decreased 4 cents from the previous week to \$2.34 per gallon—down \$1.08 from the same week last year.

Feature Article/Calendar

Containerized Grain Update

Although shipments of containerized grain through the first half of 2015 were barely above the 5-year average, shipments through the summer months and into the fall have been strong. Because of these strong movements total exports through October of this year have outpaced last year and the 5-year average (see Figure 1). Shipments were low at the beginning of the year due to a Chinese ban on dried distillers grains (DDGS) in late 2014. The port disruptions as a result of the West Coast labor contract dispute also contributed to the low shipments. (See September 17, 2015 [Grain Transportation Report Feature Article for more detail](#)) DDGS shipments started to recover in June and July with significant monthly increases of 21 and 37 percent, respectively. As fall approached, shipments went through the normal drop in August and September but remained above last year and the 5-year average. The fall grain harvest brought October shipments to more than 56,000 twenty-foot equivalent units (TEU), the peak so far this year.



Continued Low Freight Rates

The transportation outlook looks good for containerized exporters in the short-term as overcapacity continues to drive the container ocean freight market. Exporters report that rates have reached the lowest they have seen in the last decade. Container availability has also been adequate. Drewry Maritime Research reports their transpacific westbound index has fallen for the 11th consecutive month to hit a new low of \$811 per 40-ft container--\$250 below its last peak in December 2014.

Global demand has been relatively slow for carriers this summer and fall peak season, bringing freight rates and carrier revenues to record lows. The extended overcapacity condition in the market has resulted in two outcomes: (1) carrier consolidations, and (2) revenue recovery efforts through General Rate Increases (GRI) and other service measures to increase carrier revenue.

The recent purchase of APL by CMA-CGM will make CMA-CGM the largest carrier in the transpacific trade once regulatory approvals are granted. Additionally, the recent approval by the Chinese government to combine China Ocean Shipping Company (COSCO) and China Shipping Container Lines will also give this new company strong market power in the trade. The merger requires approval of minority investors in the 2 companies which has yet to be granted.

Overcapacity is making it difficult for some carriers to remain competitive, so many industry analysts believe more mergers could be on the horizon.

The Transpacific Stabilization Agreement (TSA) has announced GRIs and service adjustments for 2016 and 2017 for imports into the United States. TSA has not made similar announcements for U.S. exports. However, these measures indicate the carriers are determined to find ways to bring rates up. “Transpacific lines are adjusting to a new normal of larger ships and complex alliances, necessitated by cost and environmental compliance pressures – all in the context of an uncertain global economic environment,” explained TSA Executive Administrator, Brian Conrad. “Irrespective of cyclical supply-demand issues, it is critical that these global infrastructure providers get their pricing right and fully recover their costs through meaningful, staged rate increases heading into 2016.” TSA would like these GRIs and other measures to present a minimum voluntary rate structure for the carriers to work with during the spring service contract negotiation season.

Transportation Outlook

The traditional “slow season” for U.S. imports, which begins in late fall and lasts through February, usually prompts carriers to remove excess capacity by laying up ships and skipping some sailing rotations. However, the record low bunker fuel prices keep vessel operation costs low, which may encourage some carriers to keep vessels sailing. The Journal of Commerce reported that the number of idle vessels in October represented 4 percent of the global fleet and they expect that number to rise through November and December. (april.taylor@ams.usda.gov)

Rail Transportation

Table 3
Rail Deliveries to Port (carloads)¹

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
12/09/2015 ^p	214	2,289	5,078	736	8,317	12/5/2015	1,357
12/02/2015 ^r	212	1,662	6,275	628	8,777	11/28/2015	1,062
2015 YTD ^r	28,221	57,224	223,838	25,099	334,382	2015 YTD	92,054
2014 YTD ^r	40,258	78,863	239,260	29,082	387,463	2014 YTD	93,933
2015 YTD as % of 2014 YTD	70	73	94	86	86	% change YTD	98
Last 4 weeks as % of 2014 ²	18	102	90	83	79	Last 4wks % 2014	87
Last 4 weeks as % of 4-year avg. ²	24	147	117	86	100	Last 4wks % 4 yr	103
Total 2014	44,617	83,674	256,670	32,107	417,068	Total 2014	96,467
Total 2013	31,550	71,388	168,826	25,176	296,940	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.

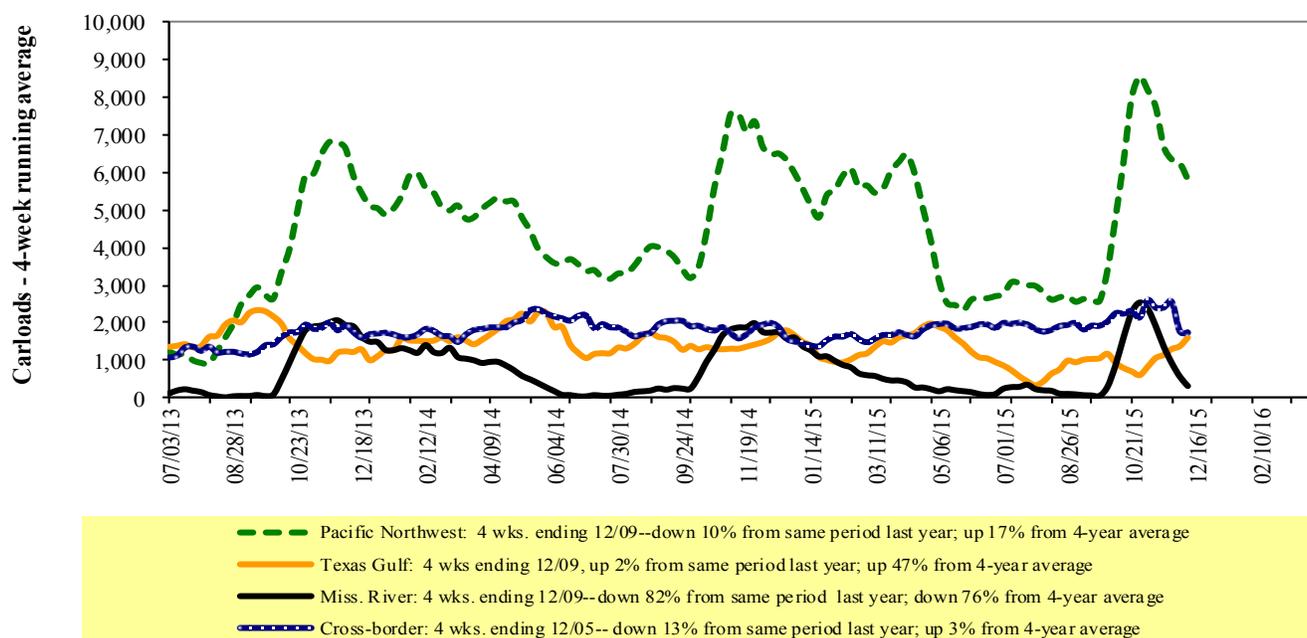
³ Cross-border weekly data is approximately 15 percent below the Association of American Railroads reported weekly carloads received by Mexican railroads to reflect switching between KCSM and Ferromex.

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



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

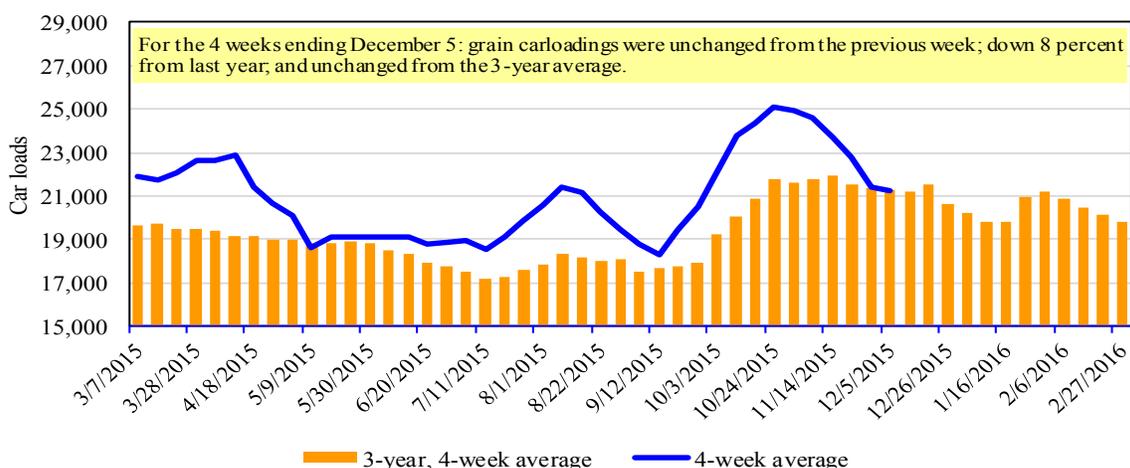
Class I Rail Carrier Grain Car Bulletin (grain carloads originated)

For the week ending: 12/5/2015	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,152	2,966	11,728	1,034	5,165	23,045	4,063	5,213
This week last year	2,469	3,330	13,080	758	6,182	25,819	5,341	5,876
2015 YTD	96,346	138,979	493,685	42,558	248,345	1,019,913	197,028	218,654
2014 YTD	91,357	137,480	433,574	42,919	269,196	974,526	220,758	252,826
2015 YTD as % of 2014 YTD	105	101	114	99	92	105	89	86
Last 4 weeks as % of 2014*	76	85	102	81	87	92	80	91
Last 4 weeks as % of 3-yr avg.*	79	86	111	91	97	100	89	84
Total 2014	103,331	153,771	482,431	47,510	297,969	1,085,012	242,616	276,322

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

²The 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 Offerings¹ (\$/car)²

For the week ending: 12/10/2015		Delivery period							
		Dec-15	Dec-14	Jan-16	Jan-15	Feb-16	Feb-15	Mar-16	Mar-15
BNSF ³	COT grain units	no offer	no offer	0	129	0	124	0	79
	COT grain single-car ⁵	no offer	no offer	25	76 .. 179	25	88 .. 157	3 .. 25	58 .. 127
UP ⁴	GCAS/Region 1	no offer	no offer	no bids	no offer	no bids	no offer	n/a	n/a
	GCAS/Region 2	no offer	no offer	no bids	no offer	no bids	no offer	n/a	n/a

¹Auction offerings are for single-car and unit train shipments only.

²Average premium/discount to tariff, last auction

³BNSF - COT = Certificate of Transportation; north grain and south grain bids were combined effective the week ending 6/24/06.

⁴UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

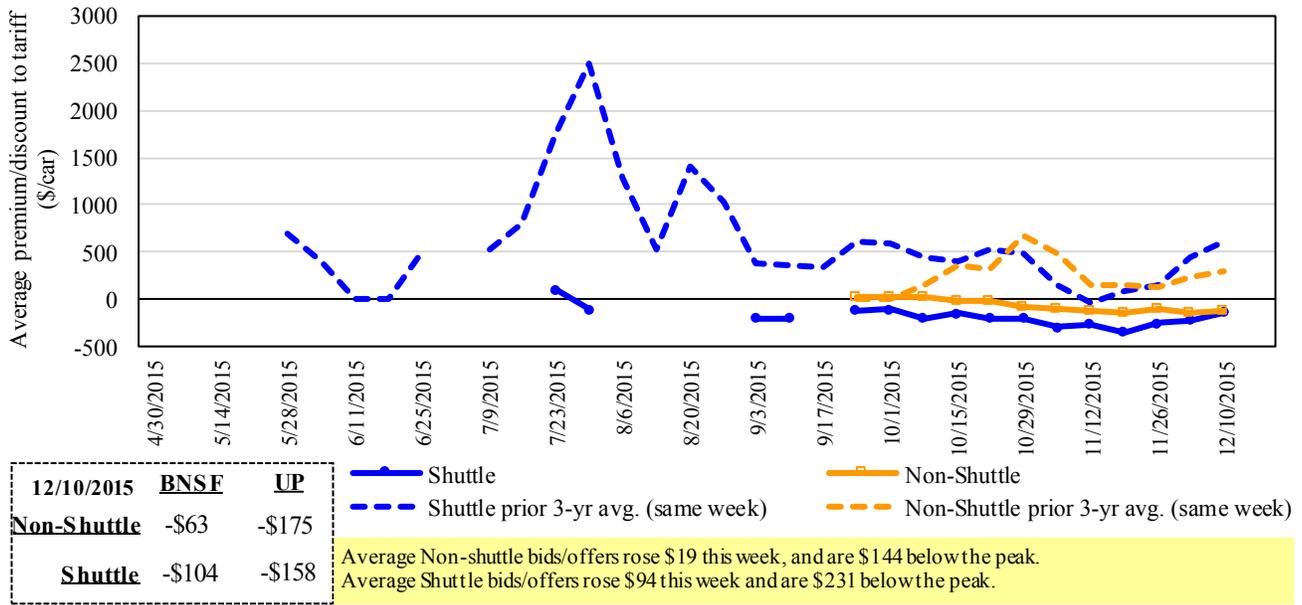
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

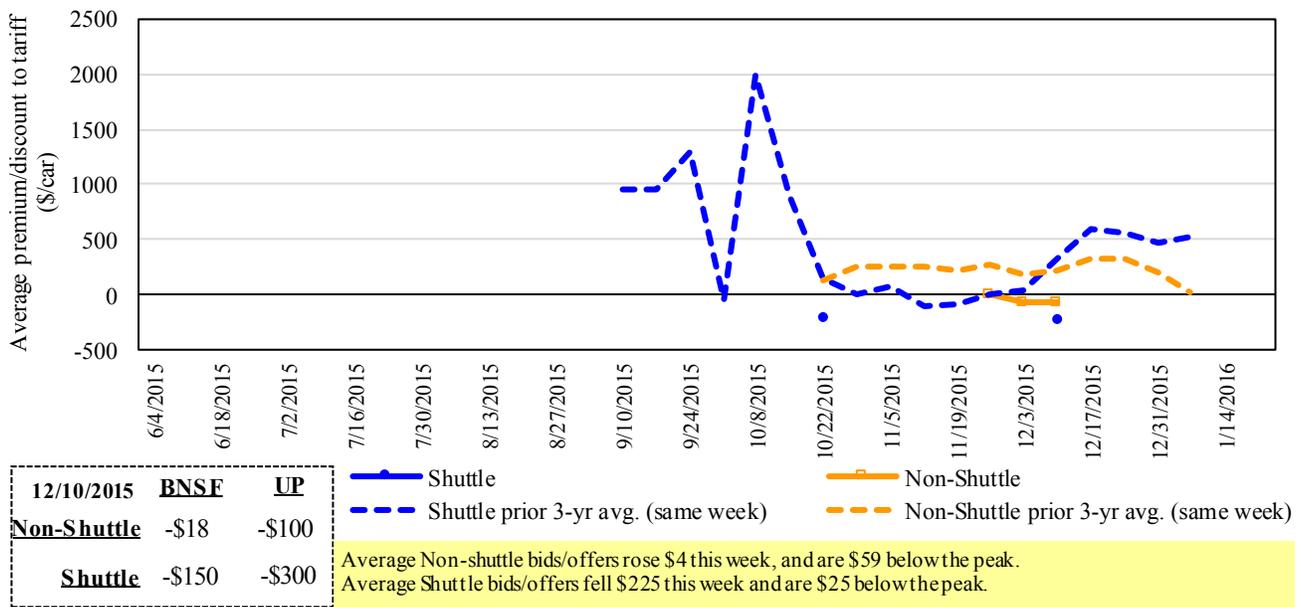
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4
Bids/Offers for Railcars to be Delivered in December 2015, Secondary Market



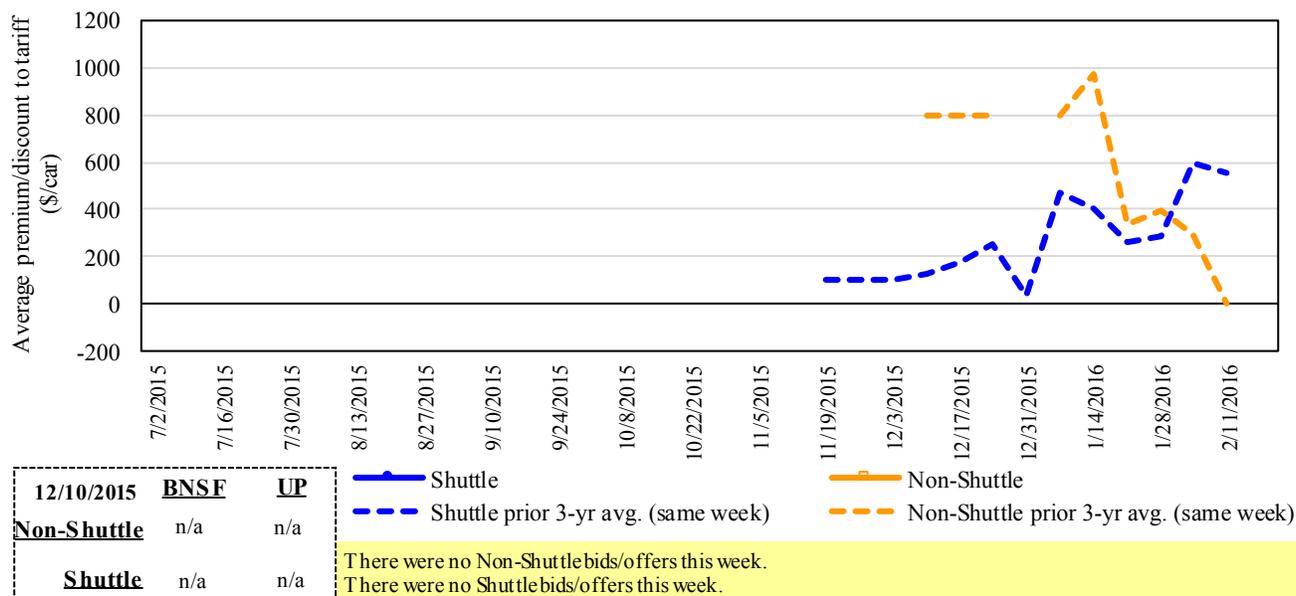
Non-shuttle bids include unit-train and single-car bids. n/a = not available.
 Source: Transportation & Marketing Programs/AMS/USDA

Figure 5
Bids/Offers for Railcars to be Delivered in January 2016, 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 February 2016, 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

For the week ending:		Delivery period					
		12/10/2015	Dec-15	Jan-16	Feb-16	Mar-16	Apr-16
Non-shuttle	BNSF-GF	(63)	(18)	n/a	n/a	n/a	n/a
	Change from last week	62	33	n/a	n/a	n/a	n/a
	Change from same week 2014	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(175)	(100)	n/a	n/a	n/a	n/a
	Change from last week	(25)	(25)	n/a	n/a	n/a	n/a
	Change from same week 2014	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	(104)	(150)	n/a	n/a	n/a	n/a
	Change from last week	96	n/a	n/a	n/a	n/a	n/a
	Change from same week 2014	(54)	(350)	n/a	n/a	n/a	n/a
	UP-Pool	(158)	(300)	n/a	n/a	n/a	n/a
	Change from last week	92	n/a	n/a	n/a	n/a	n/a
	Change from same week 2014	67	(325)	n/a	n/a	n/a	n/a

¹Average 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 Shipments¹

Effective date:		Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ³
12/1/2015	metric ton					bushel ²		
Unit train								
Wheat	Wichita, KS	St. Louis, MO	\$3,605	\$455	\$40	\$1	14	
	Grand Forks, ND	Duluth-Superior, MN	\$3,563	\$3	\$35	\$1	-3	
	Wichita, KS	Los Angeles, CA	\$6,950	\$15	\$69	\$2	4	
	Wichita, KS	New Orleans, LA	\$4,243	\$801	\$50	\$1	17	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,486	\$13	\$65	\$2	5	
	Northwest KS	Galveston-Houston, TX	\$4,511	\$878	\$54	\$1	17	
	Amarillo, TX	Los Angeles, CA	\$4,710	\$1,221	\$59	\$2	20	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$905	\$46	\$1	26	
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60	\$2	16	
	Des Moines, IA	Davenport, IA	\$2,168	\$192	\$23	\$1	6	
	Indianapolis, IN	Atlanta, GA	\$5,004	\$0	\$50	\$1	11	
	Indianapolis, IN	Knoxville, TN	\$4,311	\$0	\$43	\$1	14	
	Des Moines, IA	Little Rock, AR	\$3,444	\$563	\$40	\$1	14	
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,052	\$1,641	\$66	\$2	13	
	Minneapolis, MN	New Orleans, LA	\$3,699	\$52	\$37	\$1	-10	
	Toledo, OH	Huntsville, AL	\$5,051	\$0	\$50	\$1	24	
	Indianapolis, IN	Raleigh, NC	\$6,178	\$0	\$61	\$2	16	
	Indianapolis, IN	Huntsville, AL	\$4,529	\$0	\$45	\$1	23	
Champaign-Urbana, IL	New Orleans, LA	\$4,395	\$905	\$53	\$1	23		
Shuttle Train								
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$9	\$39	\$1	1	
	Wichita, KS	Galveston-Houston, TX	\$3,919	\$7	\$39	\$1	7	
	Chicago, IL	Albany, NY	\$5,492	\$0	\$55	\$1	22	
	Grand Forks, ND	Portland, OR	\$5,611	\$15	\$56	\$2	0	
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	\$16	\$59	\$2	-9	
	Northwest KS	Portland, OR	\$5,478	\$1,439	\$69	\$2	20	
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$19	\$50	\$1	-10	
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$17	\$49	\$1	-9	
	Champaign-Urbana, IL	New Orleans, LA	\$3,481	\$905	\$44	\$1	26	
	Lincoln, NE	Galveston-Houston, TX	\$3,600	\$10	\$36	\$1	-5	
	Des Moines, IA	Amarillo, TX	\$3,795	\$708	\$45	\$1	14	
	Minneapolis, MN	Tacoma, WA	\$5,000	\$18	\$50	\$1	-10	
	Council Bluffs, IA	Stockton, CA	\$4,640	\$19	\$46	\$1	-6	
	Sioux Falls, SD	Tacoma, WA	\$5,490	\$17	\$55	\$1	-9	
Soybeans	Minneapolis, MN	Portland, OR	\$5,510	\$19	\$55	\$1	-9	
	Fargo, ND	Tacoma, WA	\$5,380	\$15	\$54	\$1	-8	
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$1,044	\$54	\$1	14	
	Toledo, OH	Huntsville, AL	\$4,226	\$0	\$42	\$1	30	
	Grand Island, NE	Portland, OR	\$5,360	\$1,473	\$68	\$2	16	

¹A 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.

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

³Percentage change year over year calculated using tariff rate plus fuel surcharge

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	Tariff plus surcharge per:		Percent change Y/Y ⁴
				surcharge per car ²	metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,459	\$16	\$76.38	\$2.08	3
	OK	Cuautitlan, EM	\$6,514	\$20	\$66.75	\$1.81	-7
	KS	Guadalajara, JA	\$6,995	\$19	\$71.66	\$1.95	-8
	TX	Salinas Victoria, NL	\$4,142	\$7	\$42.39	\$1.15	1
Corn	IA	Guadalajara, JA	\$8,397	\$22	\$86.02	\$2.18	-3
	SD	Celaya, GJ	\$7,840	\$21	\$80.32	\$2.04	-5
	NE	Queretaro, QA	\$7,879	\$20	\$80.71	\$2.05	-3
	SD	Salinas Victoria, NL	\$6,545	\$16	\$67.04	\$1.70	3
	MO	Tlalnepantla, EM	\$7,238	\$19	\$74.15	\$1.88	-3
	SD	Torreon, CU	\$7,240	\$18	\$74.16	\$1.88	0
Soybeans	MO	Bojay (Tula), HG	\$8,652	\$19	\$88.59	\$2.41	0
	NE	Guadalajara, JA	\$9,142	\$21	\$93.62	\$2.55	-1
	IA	El Castillo, JA	\$9,470	\$21	\$96.97	\$2.64	0
	KS	Torreon, CU	\$7,439	\$13	\$76.14	\$2.07	1
Sorghum	NE	Celaya, GJ	\$7,404	\$19	\$75.84	\$1.92	-6
	KS	Queretaro, QA	\$7,563	\$12	\$77.39	\$1.96	6
	NE	Salinas Victoria, NL	\$6,168	\$14	\$63.16	\$1.60	4
	NE	Torreon, CU	\$6,827	\$16	\$69.92	\$1.77	1

¹Rates 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.

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

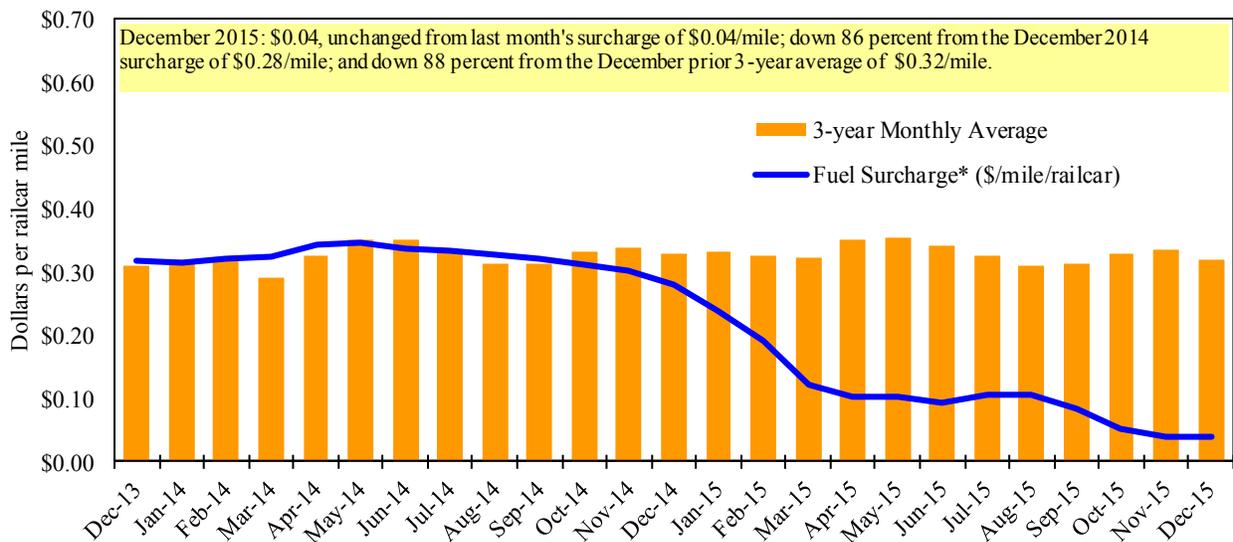
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

⁴Percentage change year over year calculated using tariff rate plus fuel surcharge

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹



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.

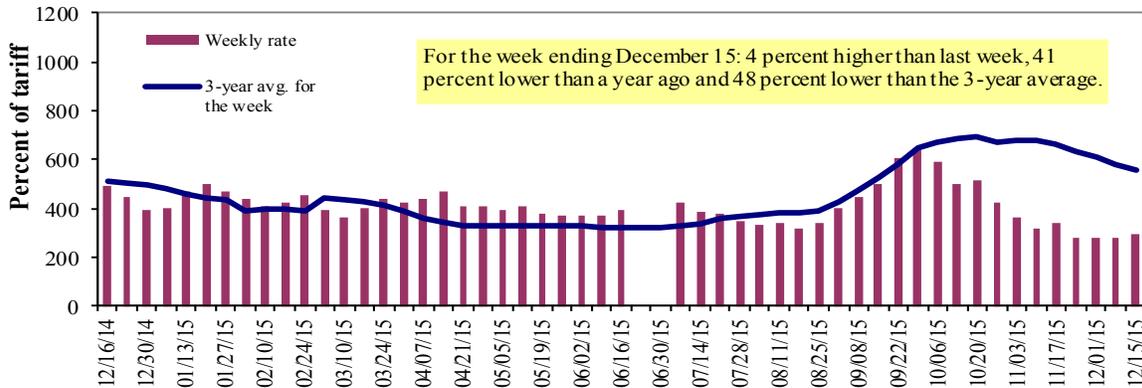
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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}



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
Rate¹	12/15/2015	-	-	290	190	200	200	177
	12/8/2015	-	-	280	180	183	183	168
\$/ton	12/15/2015	-	-	13.46	7.58	9.38	8.08	5.56
	12/8/2015	-	-	12.99	7.18	8.58	7.39	5.28
Current week % change from the same week:								
	Last year	-	-	-41	-46	-58	-58	-47
	3-year avg. ²	-	-	-48	-58	-59	-59	-50
Rate¹	January	-	-	308	190	200	200	178
	March	-	350	302	190	208	208	178

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; missing data due to winter closure
Source: Transportation & Marketing Programs/AMS/USDA

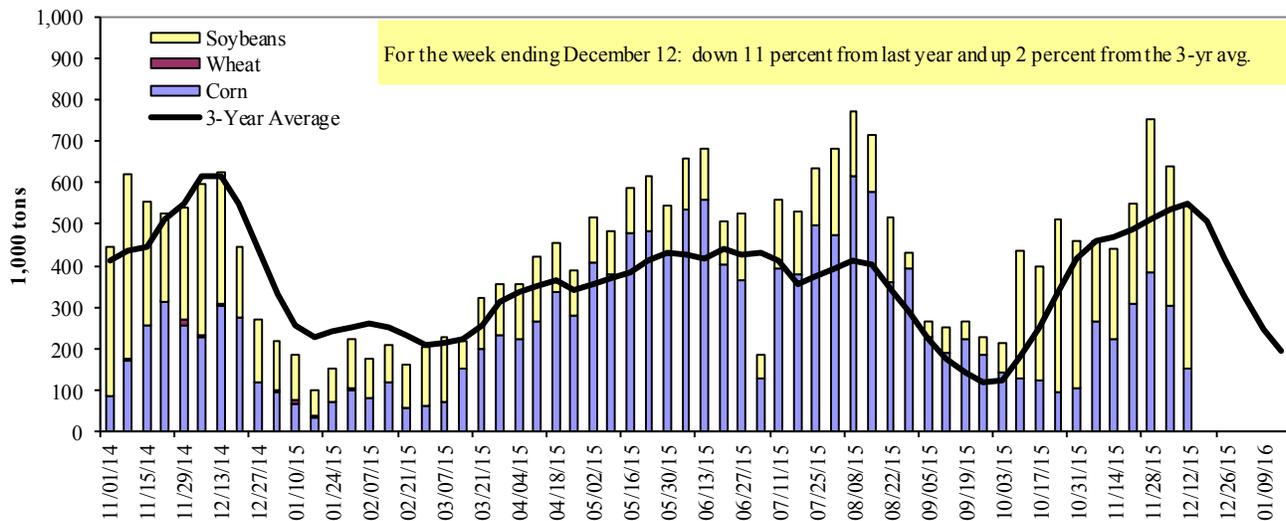
Figure 9 Benchmark tariff rates

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 River¹ (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 12/12/2015	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	38	0	33	0	71
Winfield, MO (L25)	67	6	256	3	332
Alton, IL (L26)	133	6	329	0	469
Granite City, IL (L27)	151	14	395	2	561
Illinois River (L8)	72	0	96	0	169
Ohio River (L52)	14	4	148	4	169
Arkansas River (L1)	0	0	52	1	53
Weekly total - 2015	165	18	595	7	783
Weekly total - 2014	470	18	543	18	1,048
2015 YTD ¹	18,873	1,757	12,247	342	33,219
2014 YTD	19,957	2,132	10,726	235	33,050
2015 as % of 2014 YTD	95	82	114	145	101
Last 4 weeks as % of 2014 ²	85	146	95	209	92
Total 2014	20,693	2,181	11,813	258	34,946

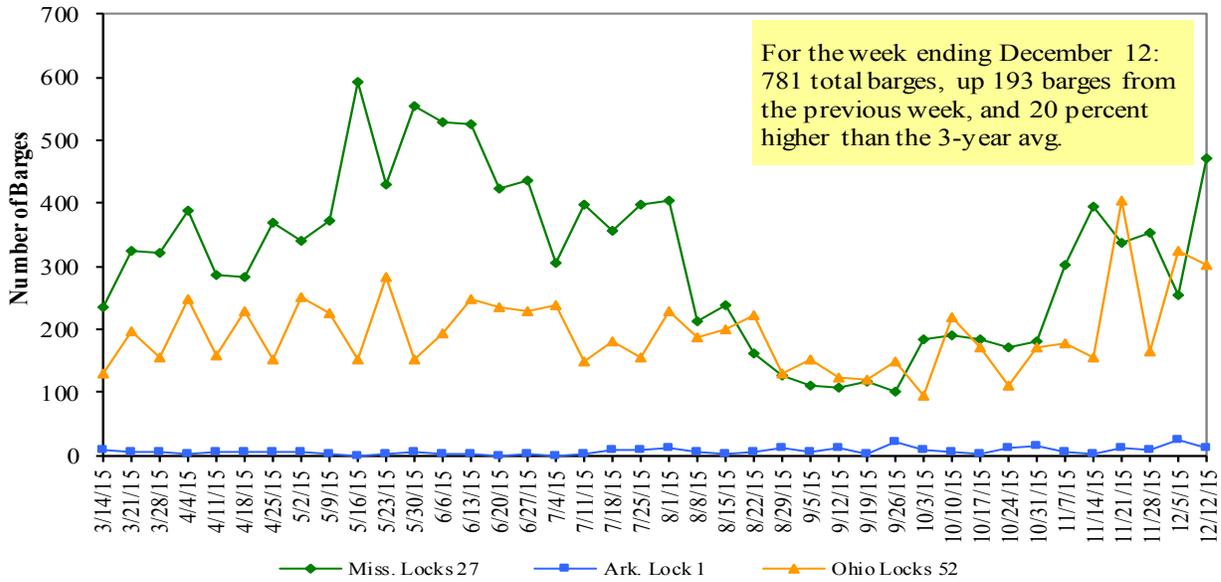
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2014.

Note: Total may not add exactly, due to rounding

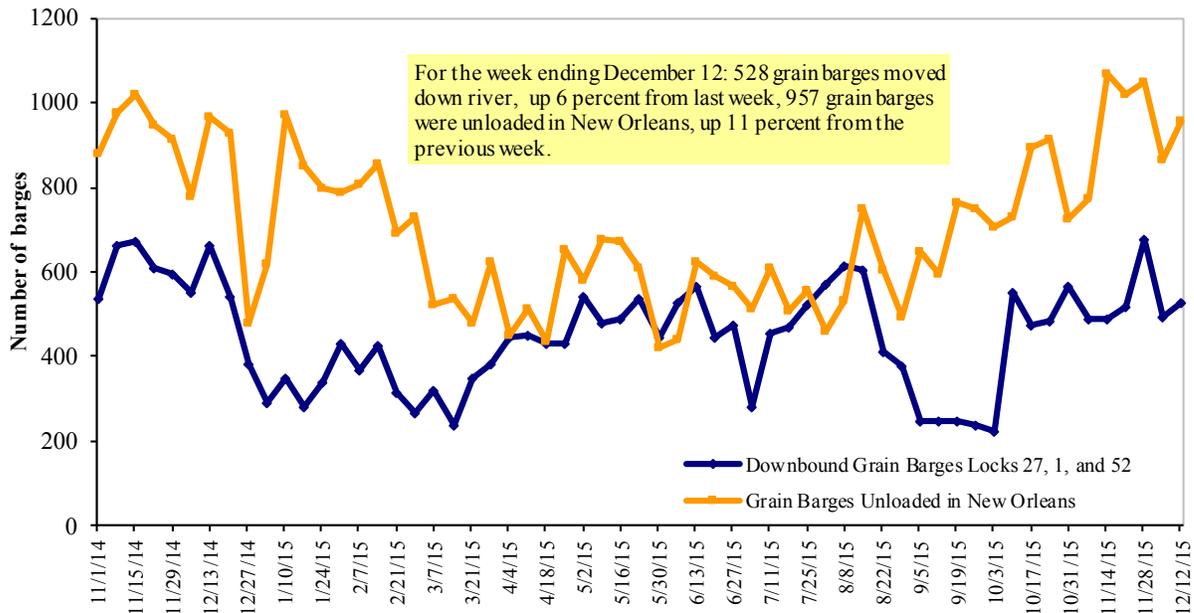
Source: U.S. Army Corps of Engineers

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 Prices¹, Week Ending 12/14/2015 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.372	-0.041	-1.013
	New England	2.453	-0.062	-1.014
	Central Atlantic	2.501	-0.041	-0.953
	Lower Atlantic	2.258	-0.037	-1.056
II	Midwest ²	2.294	-0.054	-1.179
III	Gulf Coast ³	2.212	-0.020	-1.116
IV	Rocky Mountain	2.375	-0.035	-1.129
V	West Coast	2.552	-0.051	-0.917
	West Coast less California	2.431	-0.046	-0.940
	California	2.650	-0.054	-0.900
Total	U.S.	2.338	-0.041	-1.081

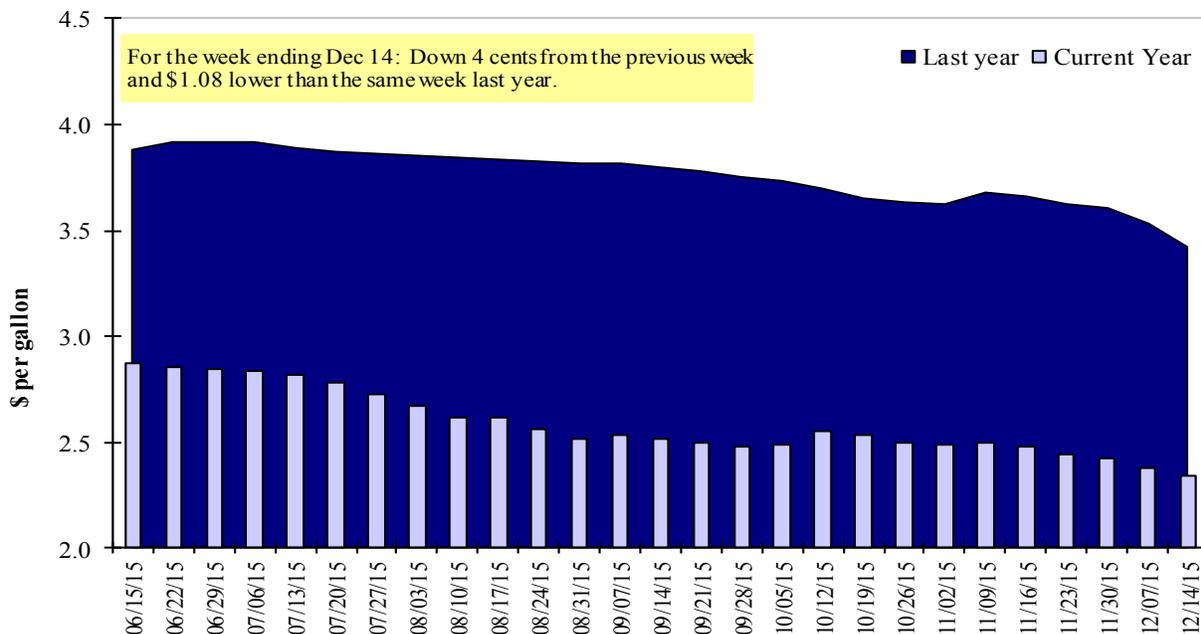
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

²Same as North Central ³Same 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)

For the week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances¹									
12/3/2015	1,276	663	1,471	1,074	49	4,532	10,943	13,194	28,669
This week year ago	1,476	848	1,634	933	117	5,008	13,777	17,732	36,517
Cumulative exports-marketing year²									
2015/16 YTD	2,823	1,936	3,202	1,701	512	10,172	7,231	21,208	38,611
2014/15 YTD	3,868	2,153	3,916	2,063	368	12,367	9,936	22,729	45,032
YTD 2015/16 as % of 2014/15	73	90	82	82	139	82	73	93	86
Last 4 wks as % of same period 2014/15	84	76	94	112	42	92	73	79	79
2014/15 Total	7,009	3,654	7,250	3,758	665	22,336	32,194	46,619	101,149
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 Importers¹ of U.S. Corn

For the week ending 12/03/2015	Total Commitments ²		% change current MY from last MY	Exports ³ 3-year avg 2011-2013
	2015/16 Current MY	2014/15 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,806	4,899	(43)	10,079
Mexico	7,293	5,900	24	8,145
Korea	387	799	(52)	2,965
Colombia	1,511	1,885	(20)	3,461
Taiwan	342	536	(36)	1,238
Top 5 Importers	12,340	14,020	(12)	25,887
Total US corn export sales	18,174	23,713	(23)	34,445
% of Projected	41%	50%		
Change from prior week	1,095	963		
Top 5 importers' share of U.S. corn export sales	68%	59%		75%
USDA forecast, December 2015	44,529	47,430	(6)	
Corn Use for Ethanol USDA forecast, December 2015	132,080	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 Importers¹ of U.S. Soybeans

For the week ending 12/03/2015	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg. 2011-13
	2015/16 Current MY	2014/15 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	20,303	25,191	(19)	24,211
Mexico	1,674	1,812	(8)	2,971
Indonesia	540	828	(35)	1,895
Japan	1,073	1,005	7	1,750
Taiwan	676	1,025	(34)	1,055
Top 5 importers	24,267	29,861	(19)	31,882
Total US soybean export sales	34,402	40,461	(15)	39,169
% of Projected	74%	81%		
Change from prior week	1,454	810		
Top 5 importers' share of U.S. soybean export sales	71%	74%		81%
USDA forecast, December 2015	46,730	50,218	(7)	

(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 Importers¹ of All U.S. Wheat

For the week ending 12/03/2015	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2012-2014
	2015/16 Current MY	2014/15 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	1,469	2,280	(36)	3,113
Mexico	1,494	1,877	(20)	2,807
Nigeria	1,186	1,692	(30)	2,512
Philippines	1,530	1,523	0	2,105
Brazil	338	1,456	(77)	2,091
Korea	960	1,022	(6)	1,273
Taiwan	651	697	(7)	1,007
Indonesia	194	398	(51)	751
Colombia	471	475	(1)	662
Thailand	379	212		618
Top 10 importers	8,293	11,419	(27)	16,939
Total US wheat export sales	14,705	17,375	(15)	26,361
% of Projected	67%	75%		
Change from prior week	225	442		
Top 10 importers' share of U.S. wheat export sales	56%	66%		64%
USDA forecast, December 2015	21,798	23,270	(6)	

(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 12/10/15	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	72	91	80	10,058	11,624	87	82	70	12,436
Corn	62	62	100	7,210	7,573	95	110	27	7,781
Soybeans	271	427	63	10,481	10,849	97	60	110	12,887
Total	405	580	70	27,749	30,045	92	65	85	33,104
Mississippi Gulf									
Wheat	108	91	119	4,378	4,325	101	341	135	4,495
Corn	390	271	144	25,481	29,061	88	80	92	30,912
Soybeans	982	1,155	85	26,765	25,270	106	76	109	29,087
Total	1,480	1,516	98	56,624	58,656	97	81	106	64,495
Texas Gulf									
Wheat	209	25	826	3,581	5,861	61	116	79	6,120
Corn	0	32	0	656	547	120	84	73	580
Soybeans	59	33	180	765	754	101	94	107	949
Total	268	90	297	5,002	7,162	70	104	87	7,649
Interior									
Wheat	22	19	113	1,319	1,305	101	92	104	1,400
Corn	46	117	39	5,769	5,328	108	119	86	5,677
Soybeans	111	48	230	3,522	3,909	90	84	84	4,312
Total	179	184	97	10,610	10,542	101	107	85	11,389
Great Lakes									
Wheat	20	11	192	961	814	118	92	76	935
Corn	0	0	n/a	491	281	175	640	954	288
Soybeans	20	54	37	662	710	93	47	73	988
Total	41	65	63	2,114	1,806	117	67	89	2,211
Atlantic									
Wheat	26	0	n/a	461	552	84	3,305	19,827	553
Corn	0	0	n/a	276	814	34	74	14	816
Soybeans	34	95	35	1,736	1,706	102	84	89	2,119
Total	60	95	63	2,473	3,072	80	92	97	3,487
U.S. total from ports²									
Wheat	458	237	193	20,758	24,481	85	119	88	25,939
Corn	498	481	103	39,883	43,604	91	84	80	46,054
Soybeans	1,476	1,812	81	43,930	43,197	102	70	106	50,342
Total	2,432	2,530	96	104,571	111,282	94	76	98	122,335

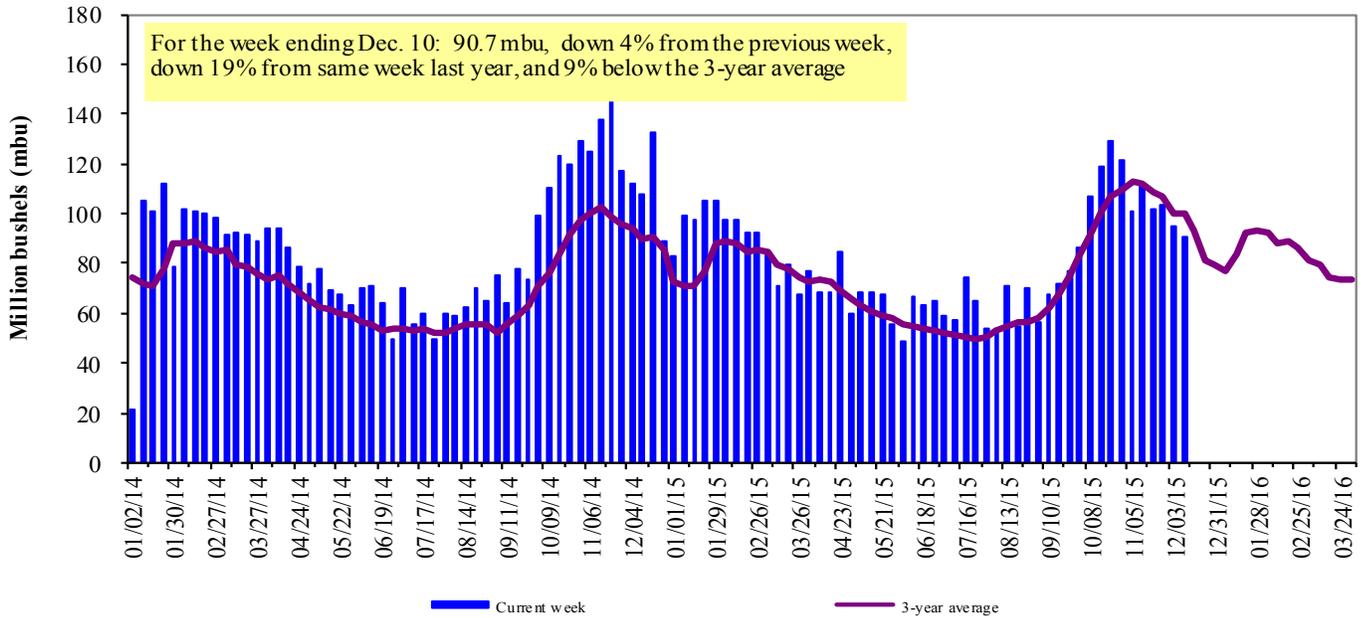
¹ Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

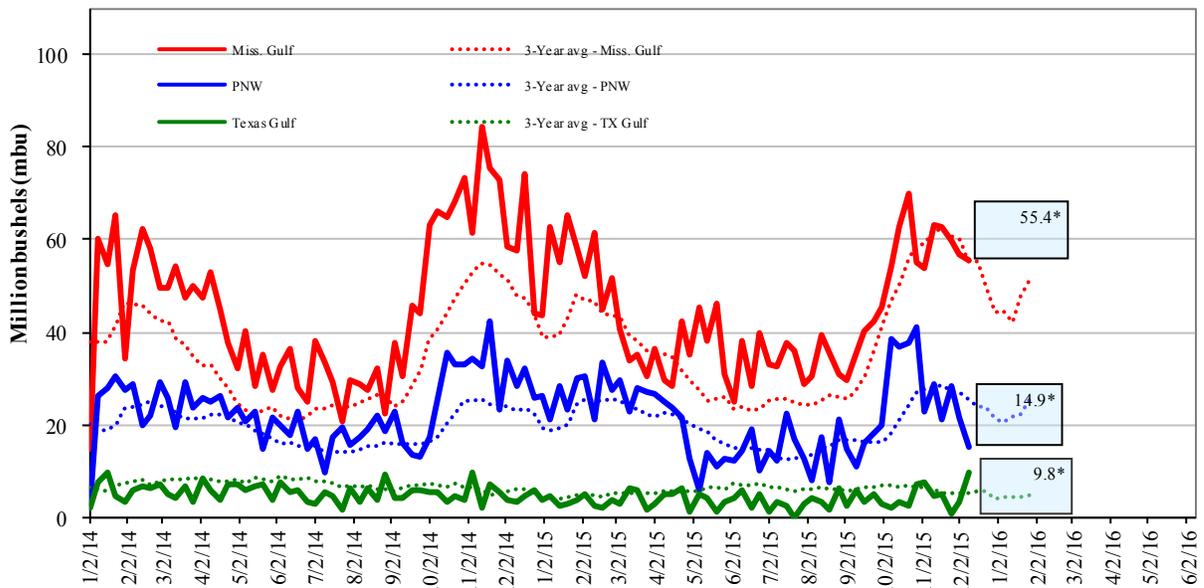


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW¹ (wheat, corn, and soybeans)



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

December 10: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 2	up 190	up 8	down 30
Last year (same week)	down 4	up 179	up 7	down 47
3-yr avg. (4-wk mov. avg.)	down 0.1	up 83	up 7	down 36

Ocean Transportation

Table 17

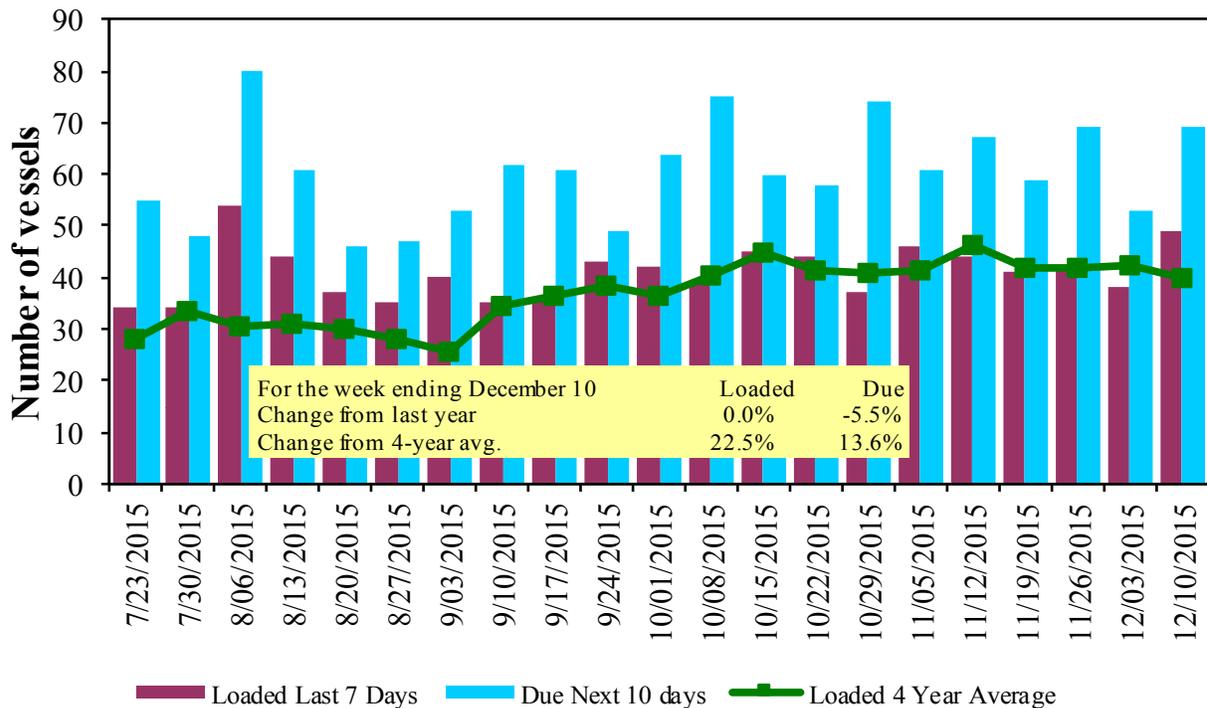
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
12/10/2015	48	49	69	15	n/a
12/3/2015	47	38	53	8	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. Gulf¹ Vessel Loading Activity

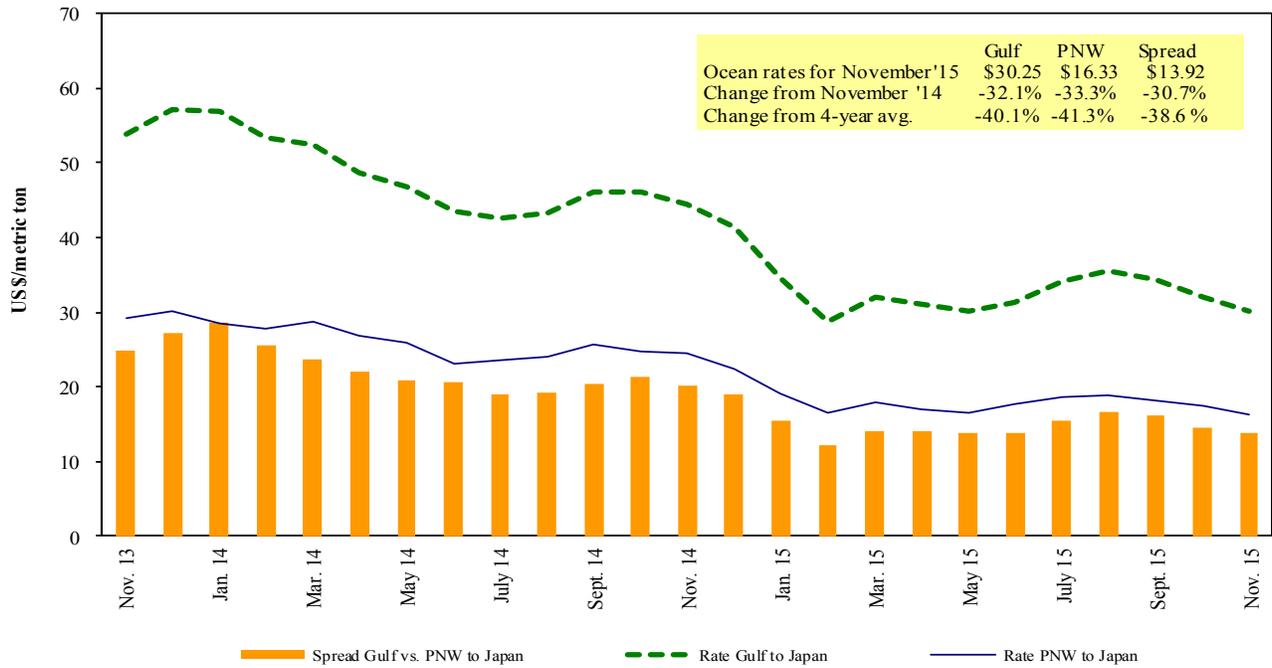


Source: Transportation & Marketing Programs/AMS/USDA

¹U.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 12/12/2015

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Dec 15/25	60,000	24.25
U.S. Gulf	China	Heavy Grain	Dec 15/25	66,000	23.00
U.S. Gulf	China	Heavy Grain	Dec 15/24	60,000	24.50
U.S. Gulf	China	Grain	Dec 5/15	56,500	22.50
U.S. Gulf	China	Heavy Grain	Dec 5/14	58,000	28.25
U.S. Gulf	China	Heavy Grain	Dec 1/10	49,000	25.50
U.S. Gulf	China	Heavy Grain	Nov 25/Dec 5	60,000	25.00
U.S. Gulf	Tanzania ¹	Wheat	Nov 24/Dec 3	12,000	148.97
U.S. Gulf	Honduras	Corn	Nov 5/15	6,700	44.00
U.S. Gulf	Japan	Grain	Dec 1/20	55,000	29.50
PNW	Bangladesh	Wheat	Dec 7/16	20,040	33.93
PNW	China	Heavy Grain	Nov 28/30	60,000	13.50
Brazil	Egypt Mediterranean	Heavy Grain	Nov 24/Dec 10	60,000	10.50
Brazil	Egypt	Grain	Dec 5/15	60,000	9.50
Brazil	Japan	Grain	Dec 16/31	60,000	19.75
Brazil	Vietnam	Grain	Dec 1/Jan 7	60,000	15.75
EC S America	China	Heavy Grain	Feb/Mar 16	60,000	18.50
France	Indonesia	Wheat	Dec 11/15	50,000	20.50
France	Algeria	Heavy Grain	Dec 5/10	25,000	11.5 op 13.00
River Plate	Yemen	Corn	Dec 8/12	310,000	33.00 op 35.00

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

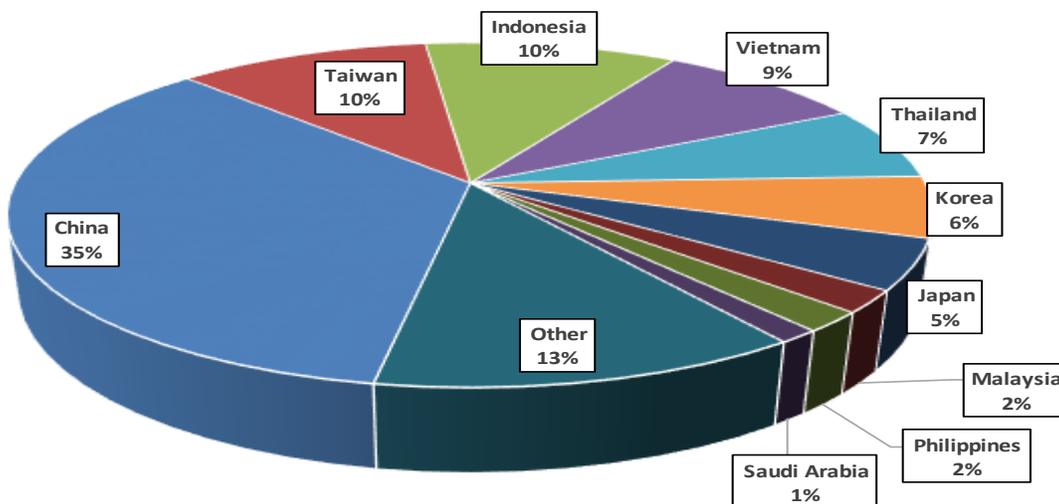
¹ 50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 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-October 2015

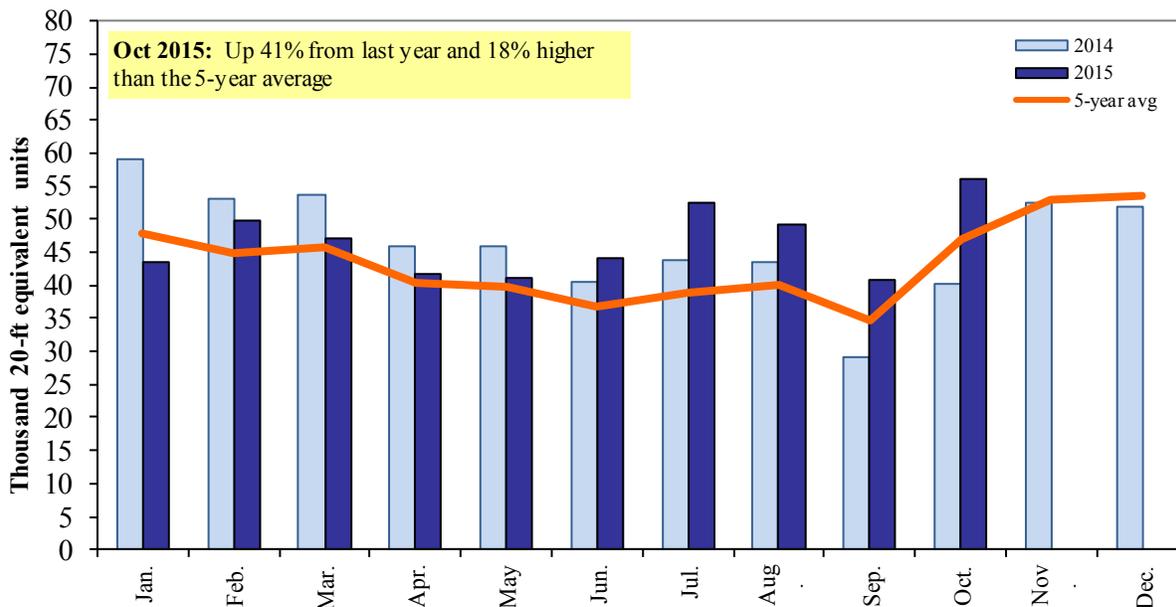


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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