



Grain Transportation Report

A weekly publication of the Transportation and Marketing Programs/Transportation Services Division
www.ams.usda.gov/GTR

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Jan. 30, 2014

WEEKLY HIGHLIGHTS

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Grain Inspections Remain Strong

For the week ending January 23, total inspections of grain (corn, wheat, and soybeans) for export from all major port regions reached 3 million metric tons (mmt), up 12 percent from the previous week, 33 percent from the same time last year, and 44 percent above the 3-year average. Increased Asian demand caused a rebound in Mississippi Gulf inspections and has pushed total year-to-date inspections of grain up 46 percent from last year this time. Soybean inspections reached 1.91 million metric tons (mmt), up 25 percent from the past week, 69 percent above last year this time, and 76 percent above the 3-year average. Inspections of soybeans were also the highest since mid-November. Soybean shipments to Asia, primarily China, jumped 30 percent from the previous week. Inspections of wheat (.382 mmt) and corn (.730 mmt), however, decreased 10 and 3 percent from the past week. Outstanding exports sales remained steady for wheat and corn but decreased slightly for soybeans.

Lock Repairs Slow Upper Mississippi Barge Traffic

The U.S. Army Corps of Engineers (Corps) is investigating a series of cable failures in the main lock at the Melvin Price Locks and Dam (also known as Locks and Dam 26) on the Mississippi River, south of Alton, IL. The main 1,200-foot lock chamber has been closed since December 28 due to problems with the cables that operate the lock gates. It is still being determined how soon the chamber will return to service, but it could possibly be as late as June 2014. It is important to note, however, the 600-foot auxiliary chamber at the Melvin Price Locks and Dam is operating to meet navigation needs. The Corps and the barge industry are working together to maintain the flow of barge traffic up to and into the Illinois River.

New Releases: Individual State-level Grain Rail Statistical Summaries

[Individual State-level reports](#) have been developed from a *State Grain Rail Statistical Summary*. Like the [original report](#), these new reports provide detailed descriptions of State-level rail movements of grain and oilseeds, but they have been organized by individual State for more convenient access. These reports include information on rail shipments from States to regions across the nation, defined as business economic areas, for both originations and receipts. Where applicable, analysis includes rail shipments, rail receipts, grain and oilseed production, animal and poultry production, grain and oilseed exports, and rail rates per ton-mile.

New Bill Includes Funding for Port and Waterway Programs

The Consolidated Appropriation Act of 2014 provides \$1 billion dedicated to the U.S. Army Corps of Engineers for navigation channel dredging operations and maintenance. In this legislation, Congress also approved initiating three new projects for deep-draft navigation studies and up to two new construction projects as part of the Corps' Civil Works appropriation.

Snapshots by Sector

Rail

U.S. railroads originated 21,246 **carloads of grain** during the week ending January 18, up 4 percent from last week and up 7 percent from last year, but down 2 percent from the 3-year average.

During the week ending January 23, average February non-shuttle **secondary railcar bids/offers per car** were \$1,000 above tariff, up \$25 from last week and \$990 higher than last year. Average shuttle bids/offers were \$1,194 per car above tariff, down \$543.50 from last week and \$1,309 higher than last year.

Barge

During the week ending January 25, **barge grain movements** totaled 725,373 tons—46.8 percent higher than the previous week and 45.5 percent higher than the same period last year.

During the week ending January 25, 480 grain barges **moved down river**, up 58.4 percent from last week; 771 grain barges were **unloaded in New Orleans**, down 13.2 percent from the previous week.

Ocean

During the week ending January 23, 52 **ocean-going grain vessels** were loaded in the Gulf, 24 percent more than the same period last year. Eighty-four vessels are expected to be loaded within the next 10 days, 71 percent more than the same period last year.

During the week ending January 24, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$56.50 per mt, unchanged from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$28. per mt, unchanged from the previous week.

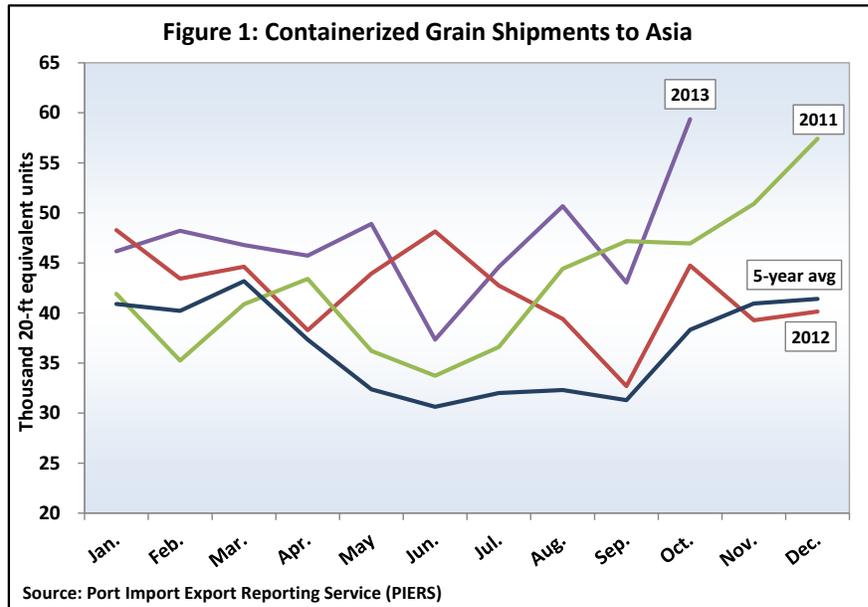
Fuel

During the week ending January 27, U.S. average **diesel fuel prices** increased 3 cents from the previous week to \$3.90 per gallon—down 2 cents from with the same week last year.

Feature Article/Calendar

U.S. CONTAINERIZED GRAIN EXPORT UPDATE

For much of the period between January and October, 2013, containerized grain exports were greater than the averages for 2012 and 2011, and above the 5-year average (see Figure 1). Volumes hit a record high in October 2013 with nearly 60,000 twenty-foot equivalent units (TEU) exported. Distillers grains (DDGS), a derivative of corn-based ethanol production, were the top containerized grain export (see table below), and China was the top destination market for this feed supplement. Ocean freight rates were stable during much of the year due to overcapacity of vessel service; this trend is expected to continue in 2014.



During the first 10 months of 2013, DDGS exports were 46 percent of containerized grain exports followed by soybeans at 28 percent (see table). The record movements of DDGS in October pushed the

U.S. Waterborne Containerized Grain Exports, January-October, 2013				
HTS Code	Commodities	Metric Tons	TEU	Share
230330	Distillers Grains	3,192,513	244,485	46%
120100	Soybeans	1,932,356	119,417	28%
230990	Animal Feed	481,625	38,571	7%
100590	Corn	408,055	24,500	6%
120810	Soybean Meal	366,236	27,580	5%
	Other	502,675	34,080	7%
Total		6,883,458	488,633	100%

Source: Port Import Export Reporting Service (PIERS)

year-to-date total to an all-time record as well. These records are a result of the strong demand for DDGS in China where total U.S. DDGS imports between January and November of 2013 grew more than 90 percent over the same timeframe in 2012. However, the Chinese government has recently restricted the entry of an unapproved GMO corn product. At this time, the long-term impact of these new regulations is unclear. However, the use of containers to move these products would allow for smaller and more easily identified shipments.

Overcapacity Expected to Continue

Industry reports are forecasting the 2014 market to be much the same as 2013, with overcapacity in the ocean-shipping market and more vessels being delivered in 2014. Carriers will likely work to rebalance supply and demand in multiple ways, including: (1) the continued practices of slow steaming, (2) blank sailing, and (3) laying up vessels. Slow steaming is the practice of reducing the speed at which carriers operate transoceanic vessels in an effort to reduce fuel consumption. Blank sailing is where carriers may decide to skip voyages of a vessel string. Laying up vessels is when carriers take a vessel out of service; this is a more common practice during the slow winter months of U.S. imports from Asia. These practices can be unnerving to exporters, particularly if they are exercised with little notice given to the market. They could be common during the slow winter season and particularly during the Chinese New Year Celebration. The Chinese New Year falls early this year, January 30, meaning impacts could be felt as early as the middle of January.

A recent Journal of Commerce analysis of vessel capacity data from Alphaliner reports that overall vessel capacity will increase by more than 1.6 million TEU and that 17 of the top 20 ocean carriers will be increasing vessel capacity this year. This means 2014 could be a record-breaking year for capacity and the rebalancing practices mentioned above will likely be more frequent to reduce the pressure of overcapacity on rates.

Ocean Freight Rates Relatively Flat in 2013

Container rates were relatively flat through November 2013—on average about 10 percent higher than 2012, but around 6 percent lower than 2011. Rates sustained an uptick in March and remained nearly unchanged until September, when overall demand for ocean container service began to fall. Bulk ocean freight rates were also flat during the majority of 2013 with an uptick in September, as the U.S. grain harvest began. The fall and winter months are considered the slow season for ocean container carriers because import

traffic falls significantly after the holiday season, and the Chinese New Year reduces overall exports from Asia. However, this is an active season for overall grain exports from the United States, which typically shifts the market to higher bulk ocean freight rates, as was the case in September 2013. (See Figure 2)

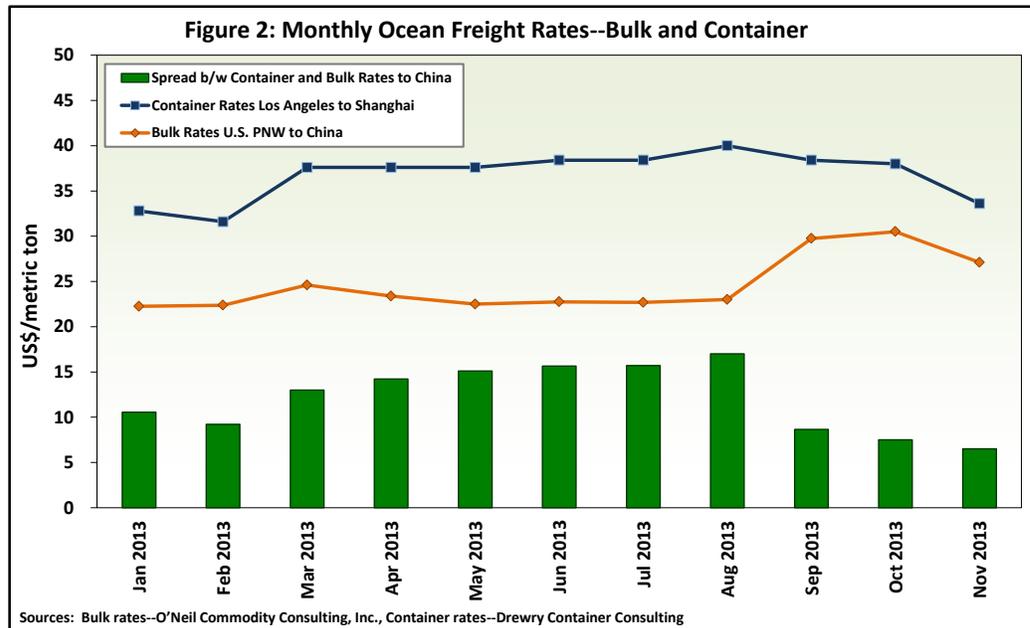


Figure 2 compares container and bulk ocean freight rates and displays the spread between the two datasets. As the bulk and container rates grow closer together the spread falls significantly—54 percent in September, another 23 percent in October, and 18 percent farther in November. As the spread falls, the two ocean transportation options become more competitive with one another for shippers who have the option of using either bulk or container. The container option may be particularly useful for corn and DDGS exports to China, where regulatory uncertainty continues for these imports. Additionally, the industry is closely watching the rebalancing practices from the ocean carrier community and the potential impact on rates over the next few months, as carriers struggle to contain costs and increase profits. (April.Taylor@ams.usda.gov)

Rail Transportation

Table 3

Rail Deliveries to Port (carloads)¹

Week ending	Mississippi		Pacific	Atlantic &		Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf				
1/29/2014 ^P	1,269	1,451	7,069	847	10,636	1/25/2014	1,942	
1/22/2014 ^r	1,589	1,726	6,477	1,027	10,819	1/18/2014	1,525	
2014 YTD ^r	6,422	7,845	28,568	3,735	46,570	2014 YTD	8,437	
2013 YTD ^r	5,246	3,597	21,914	3,673	34,430	2013 YTD	5,116	
2014 YTD as % of 2013 YTD	122	218	130	102	135	% change YTD	165	
Last 4 weeks as % of 2013 ²	102	180	122	98	121	Last 4wks % 2013	177	
Last 4 weeks as % of 4-year avg. ²	180	112	125	102	126	Last 4wks % 4 yr	117	
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	70,298	
Total 2012	22,604	40,780	199,419	24,659	287,462	Total 2012	92,008	

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.

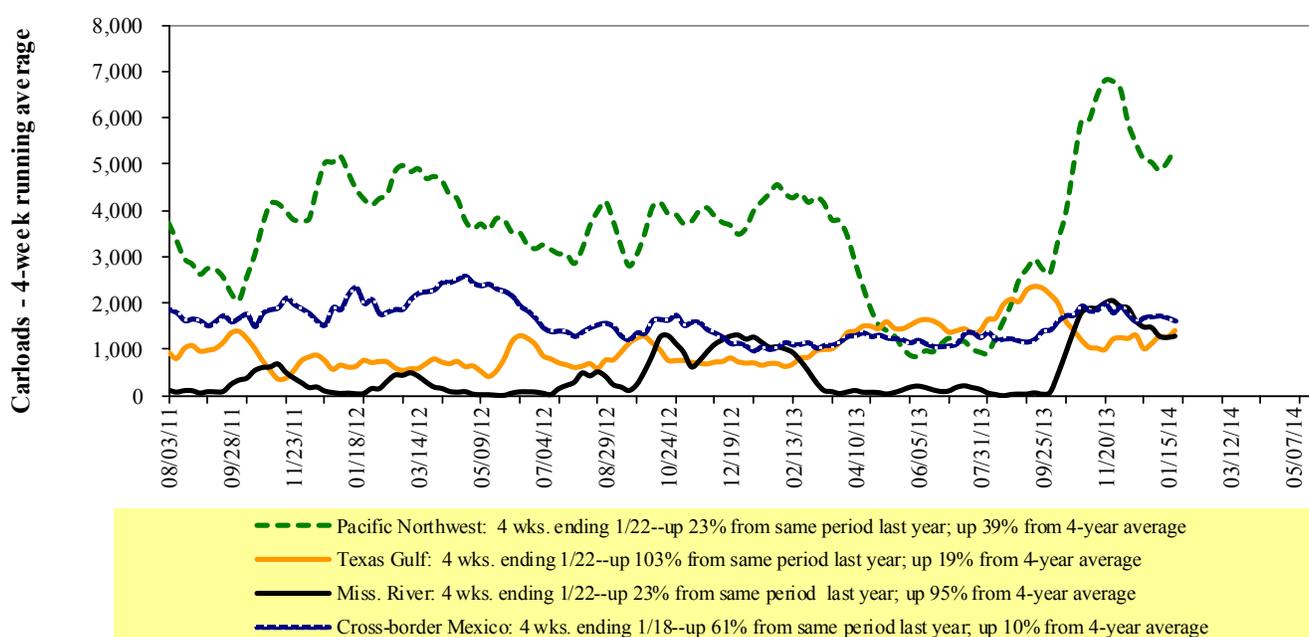
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 29 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

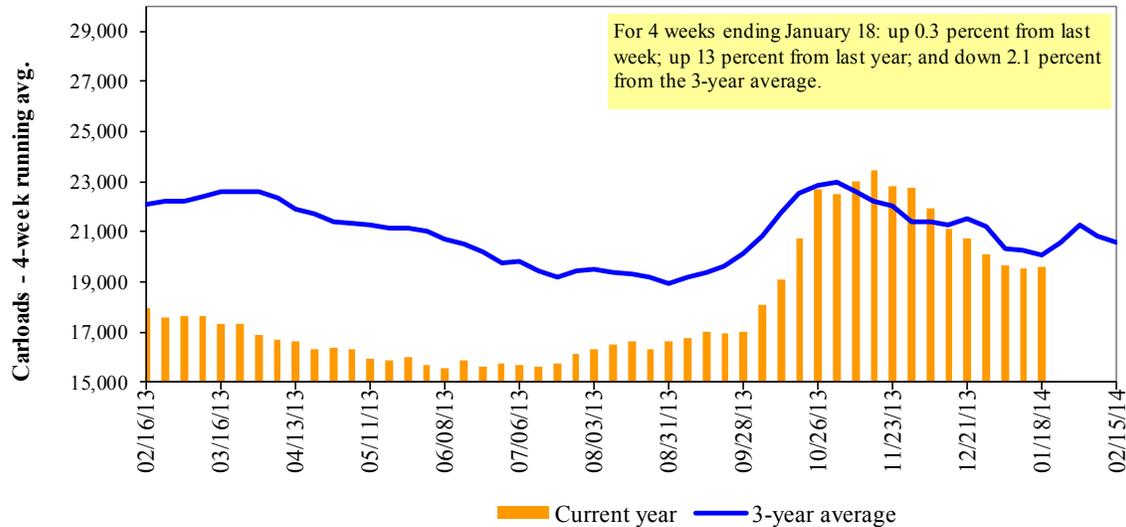
Table 4

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
01/18/14	2,592	2,900	8,783	920	6,051	21,246	4,470	4,924
This week last year	1,783	2,818	10,753	686	3,887	19,927	4,740	6,607
2014 YTD	6,499	8,971	24,395	3,059	17,335	60,259	11,852	13,782
2013 YTD	5,067	8,571	29,771	1,656	11,324	56,389	12,235	17,384
2014 YTD as % of 2013 YTD	128	105	82	185	153	107	97	79
Last 4 weeks as % of 2013	136	116	85	188	162	113	94	83
Last 4 weeks as % of 3-yr avg. ¹	104	109	79	175	117	97	103	96
Total 2013	86,466	137,915	454,262	34,412	222,258	935,313	190,125	272,753

¹As a percent of the same period in 2009 and 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

Week ending	Delivery period							
	Feb-14	Feb-13	Mar-14	Mar-13	Apr-14	Apr-13	May-14	May-13
BNSF ³								
COT grain units	no offer	no bids	no offer	0	379	no bids	278	no offer
COT grain single-car ⁵	no offer	0 . . 10	no offer	10	151 . . 301	no bids	137 . . 250	no offer
UP ⁴								
GCAS/Region 1	no offer	no bids	no offer	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	no offer	no bids	no offer	no bids	2	no bids	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.

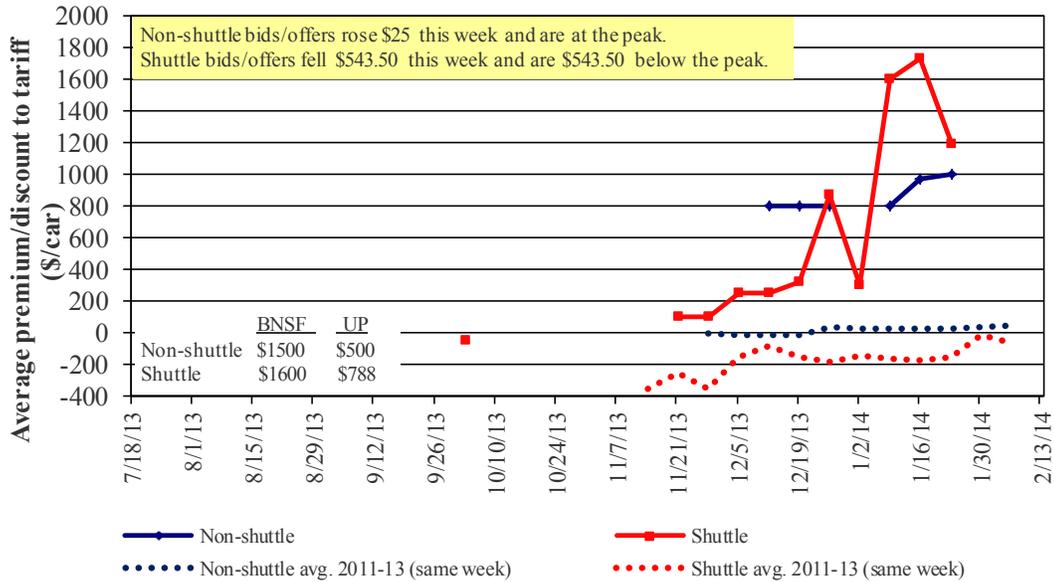
⁵Range is shown because average is not available. Not available = n/a.

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 February 2014, Secondary Market

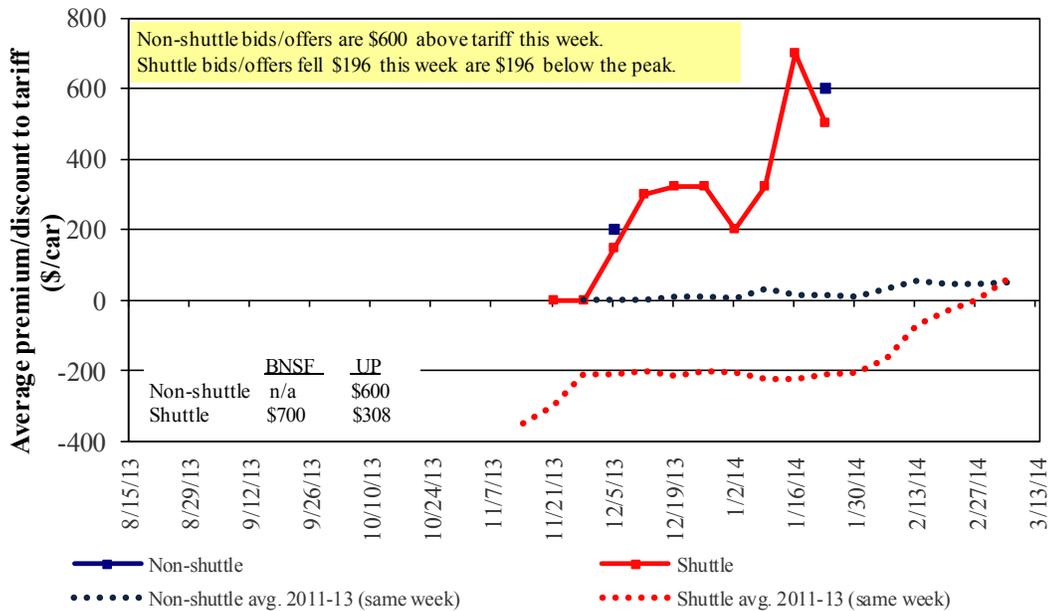


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in March 2014, Secondary Market

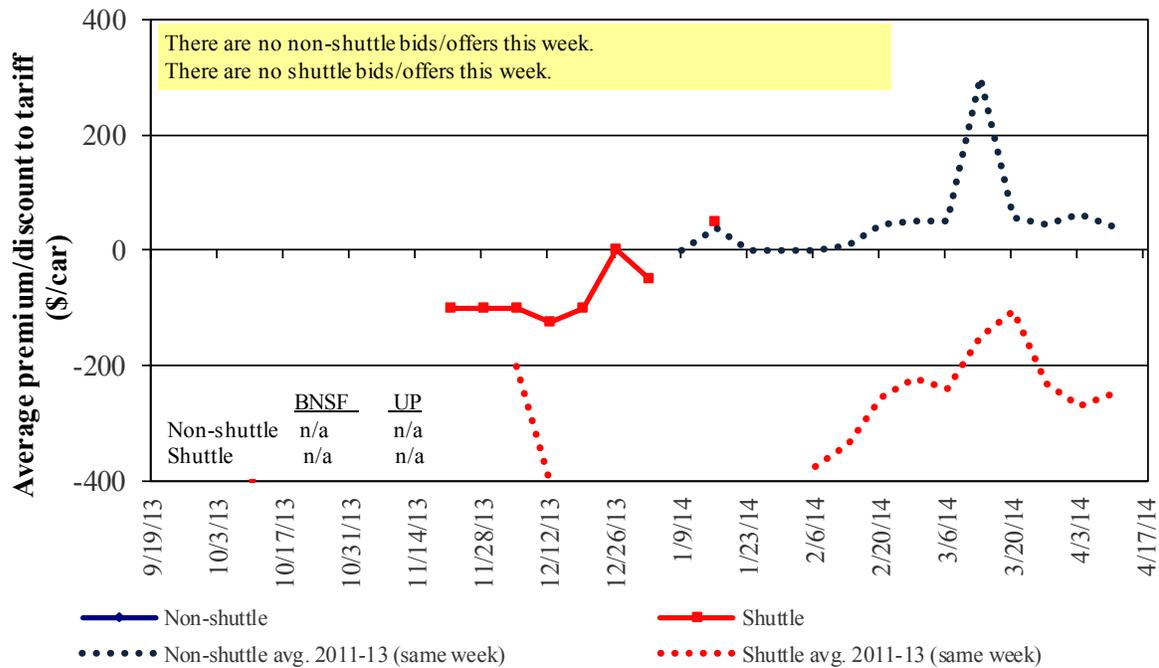


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in April 2014, 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	Delivery period					
	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14
Non-shuttle						
BNSF-GF	1,500	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 2013	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	500	600	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 2013	490	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	1,600	700	n/a	n/a	n/a	n/a
Change from last week	(1,100)	(450)	n/a	n/a	n/a	n/a
Change from same week 2013	1,692	n/a	n/a	n/a	n/a	n/a
UP-Pool	788	308	n/a	n/a	n/a	n/a
Change from last week	13	58	n/a	n/a	n/a	n/a
Change from same week 2013	926	408	n/a	n/a	n/a	n/a

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

²Shuttle 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.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

Effective date:				Fuel	Tariff plus surcharge per:		Percent
1/1/2014	Origin region*	Destination region*	Tariff rate/car	surcharge per car	metric ton	bushe ²	change Y/Y ³
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,191	\$177	\$33.45	\$0.91	1
	Grand Forks, ND	Duluth-Superior, MN	\$3,596	\$101	\$36.72	\$1.00	1
	Wichita, KS	Los Angeles, CA	\$6,244	\$520	\$67.17	\$1.83	2
	Wichita, KS	New Orleans, LA	\$3,808	\$312	\$40.91	\$1.11	3
	Sioux Falls, SD	Galveston-Houston, TX	\$5,824	\$427	\$62.08	\$1.69	3
	Northwest KS	Galveston-Houston, TX	\$4,076	\$341	\$43.87	\$1.19	3
	Amarillo, TX	Los Angeles, CA	\$4,275	\$475	\$47.17	\$1.28	2
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,192	\$352	\$35.19	\$0.89	1
	Toledo, OH	Raleigh, NC	\$4,686	\$398	\$50.49	\$1.28	3
	Des Moines, IA	Davenport, IA	\$2,078	\$75	\$21.38	\$0.54	3
	Indianapolis, IN	Atlanta, GA	\$4,061	\$299	\$43.30	\$1.10	3
	Indianapolis, IN	Knoxville, TN	\$3,469	\$192	\$36.35	\$0.92	3
	Des Moines, IA	Little Rock, AR	\$3,218	\$219	\$34.13	\$0.87	1
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,215	\$638	\$58.12	\$1.48	1
	Minneapolis, MN	New Orleans, LA	\$3,624	\$387	\$39.83	\$1.08	-2
	Toledo, OH	Huntsville, AL	\$3,687	\$283	\$39.42	\$1.07	2
	Indianapolis, IN	Raleigh, NC	\$4,756	\$401	\$51.21	\$1.39	3
	Indianapolis, IN	Huntsville, AL	\$3,379	\$192	\$35.46	\$0.97	3
Champaign-Urbana, IL	New Orleans, LA	\$3,748	\$352	\$40.72	\$1.11	3	
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,678	\$299	\$39.50	\$1.07	2
	Wichita, KS	Galveston-Houston, TX	\$3,798	\$233	\$40.03	\$1.09	4
	Chicago, IL	Albany, NY	\$3,950	\$374	\$42.93	\$1.17	3
	Grand Forks, ND	Portland, OR	\$5,159	\$517	\$56.36	\$1.53	1
	Grand Forks, ND	Galveston-Houston, TX	\$6,084	\$538	\$65.76	\$1.79	-1
	Northwest KS	Portland, OR	\$5,043	\$560	\$55.64	\$1.51	2
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$629	\$55.90	\$1.42	2
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$576	\$54.98	\$1.40	2
	Champaign-Urbana, IL	New Orleans, LA	\$3,011	\$352	\$33.40	\$0.85	1
	Lincoln, NE	Galveston-Houston, TX	\$3,510	\$336	\$38.19	\$0.97	4
	Des Moines, IA	Amarillo, TX	\$3,590	\$275	\$38.39	\$0.98	1
	Minneapolis, MN	Tacoma, WA	\$5,000	\$624	\$55.85	\$1.42	2
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,400	\$646	\$50.11	\$1.27	3
	Sioux Falls, SD	Tacoma, WA	\$5,520	\$576	\$60.54	\$1.65	2
	Minneapolis, MN	Portland, OR	\$5,530	\$629	\$61.17	\$1.66	2
	Fargo, ND	Tacoma, WA	\$5,430	\$512	\$59.01	\$1.61	2
	Council Bluffs, IA	New Orleans, LA	\$4,175	\$406	\$45.49	\$1.24	4
	Toledo, OH	Huntsville, AL	\$2,862	\$283	\$31.23	\$0.85	3
Grand Island, NE	Portland, OR	\$5,110	\$573	\$56.43	\$1.54	2	

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		Percent change Y/Y ⁴	
				surcharge per car ²	Tariff plus surcharge per: metric ton ³ bushel ³		
Wheat	MT	Chihuahua, CI	\$6,360	\$547	\$70.57	\$1.92	-6
	OK	Cuautitlan, EM	\$6,156	\$664	\$69.68	\$1.89	-7
	KS	Guadalajara, JA	\$6,559	\$642	\$73.57	\$2.00	-12
	TX	Salinas Victoria, NL	\$2,898	\$250	\$32.16	\$0.87	-18
Corn	IA	Guadalajara, JA	\$7,974	\$754	\$89.18	\$2.26	2
	SD	Celaya, GJ	\$7,656	\$715	\$85.54	\$2.17	3
	NE	Queretaro, QA	\$7,317	\$670	\$81.61	\$2.07	1
	SD	Salinas Victoria, NL	\$5,880	\$544	\$65.63	\$1.67	2
	MO	Tlalnepantla, EM	\$6,755	\$651	\$75.67	\$1.92	1
	SD	Torreón, CU	\$6,722	\$599	\$74.80	\$1.90	2
Soybeans	MO	Bojay (Tula), HG	\$7,868	\$636	\$86.89	\$2.36	3
	NE	Guadalajara, JA	\$8,447	\$728	\$93.74	\$2.55	3
	IA	El Castillo, JA	\$8,855	\$711	\$97.74	\$2.66	2
	KS	Torreón, CU	\$6,864	\$452	\$74.74	\$2.03	2
Sorghum	TX	Guadalajara, JA	\$6,953	\$465	\$75.80	\$1.92	6
	NE	Celaya, GJ	\$7,212	\$649	\$80.32	\$2.04	2
	KS	Queretaro, QA	\$6,650	\$408	\$72.11	\$1.83	-3
	NE	Salinas Victoria, NL	\$5,368	\$478	\$59.72	\$1.52	-2
	NE	Torreón, CU	\$6,243	\$533	\$69.24	\$1.76	0

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.

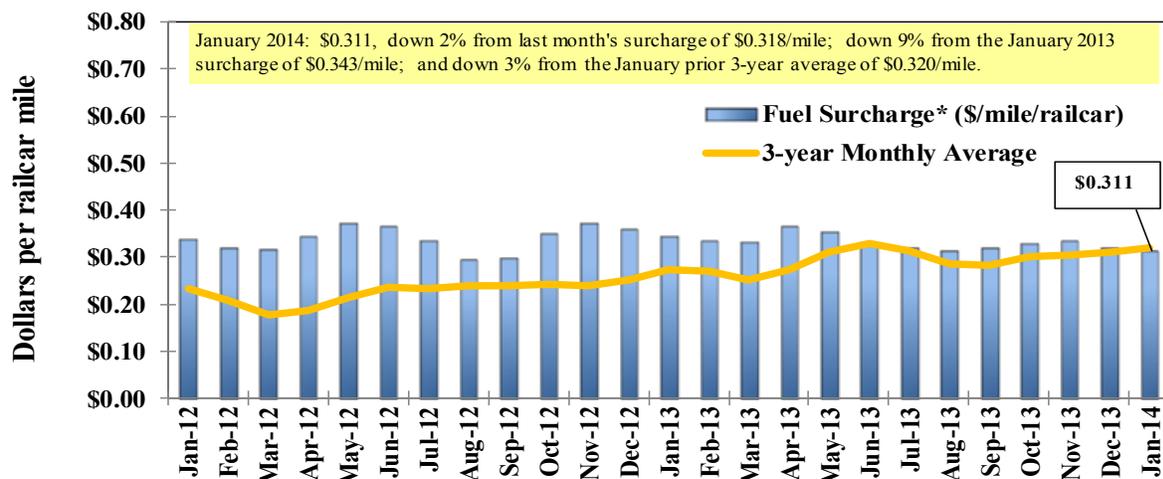
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V. railroad fuel surcharge policy as of 10/01/2009

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.

* 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.

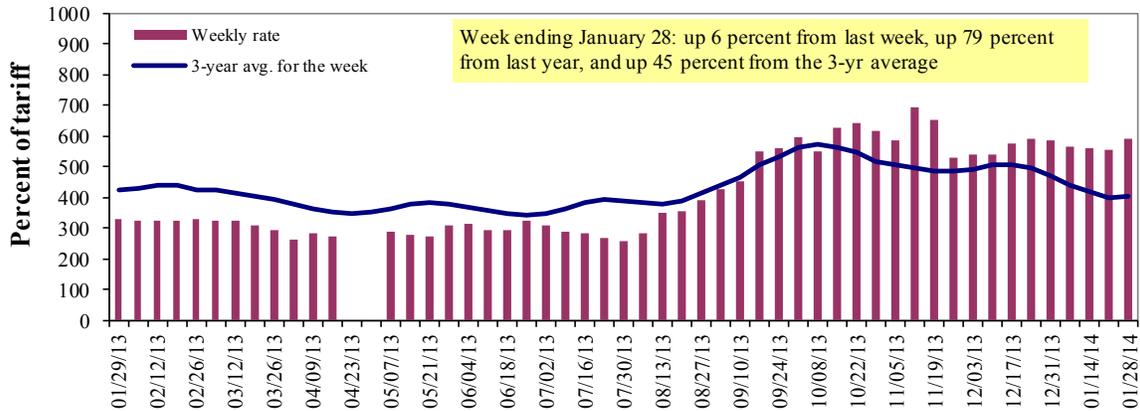
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.esx.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	1/28/2014	--	--	590	492	475	475	325
	1/21/2014	--	--	555	443	443	443	308
\$/ton	1/28/2014	--	--	27.38	19.63	22.28	19.19	10.21
	1/21/2014	--	--	25.75	17.68	20.78	17.90	9.67
Current week % change from the same week:								
	Last year	--	--	79	80	111	111	78
	3-year avg. ²	--	--	45	46	39	39	22
Rate¹	February	--	--	513	442	430	430	308
	April	445	415	400	335	365	365	272

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

Source: Transportation & Marketing Programs/AMS/USDA

Calculating barge rate per ton:

(Index * 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map (see figure 9).

Figure 9

Benchmark tariff rates

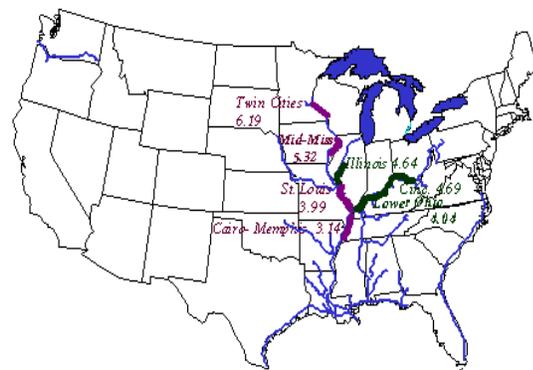
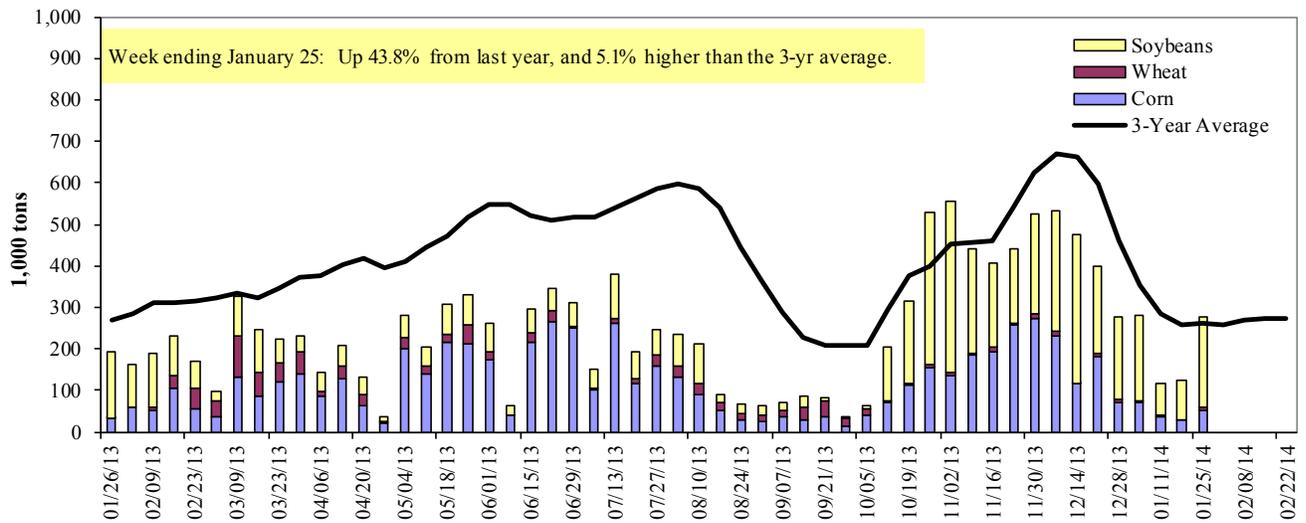


Figure 10

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)

Week ending 1/25/2014	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	0	0	0	0	0
Alton, IL (L26)	77	6	203	0	287
Granite City, IL (L27)	52	6	218	0	276
Illinois River (L8)	31	6	137	0	175
Ohio River (L52)	169	0	229	0	398
Arkansas River (L1)	0	7	45	0	52
Weekly total - 2014	220	13	492	0	725
Weekly total - 2013	60	56	382	0	498
2014 YTD ¹	736	86	1,406	27	2,255
2013 YTD	298	187	1,315	19	1,819
2014 as % of 2013 YTD	247	46	107	141	124
Last 4 weeks as % of 2013 ²	247	46	107	141	124
Total 2013	9,504	4,111	10,065	255	23,935

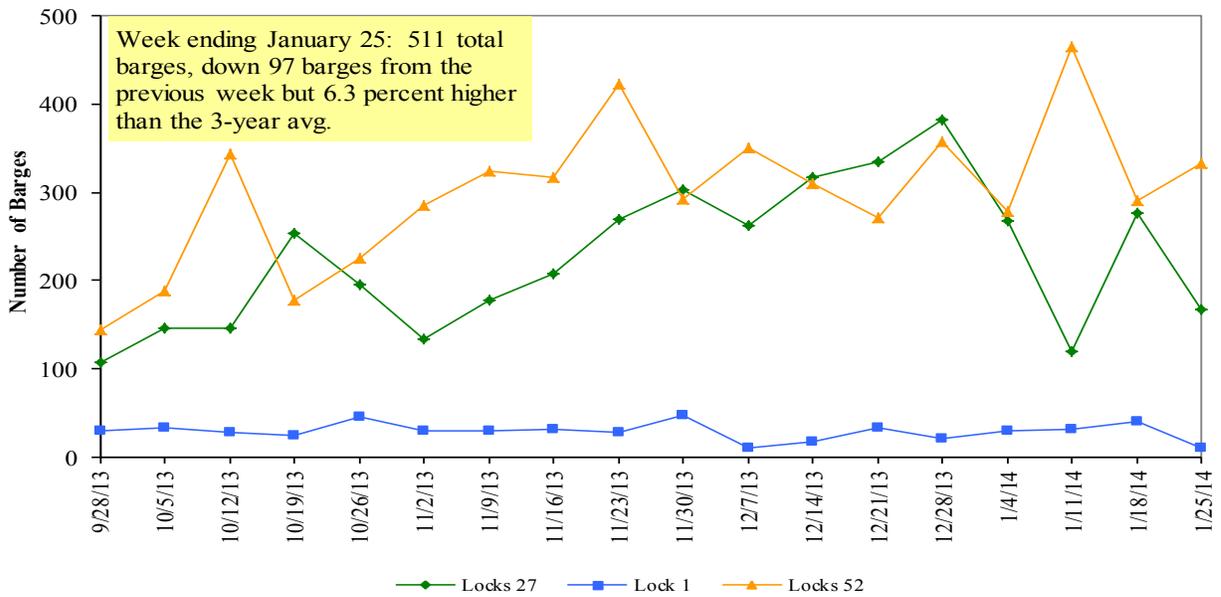
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2013.

Note: Total may not add exactly, due to rounding

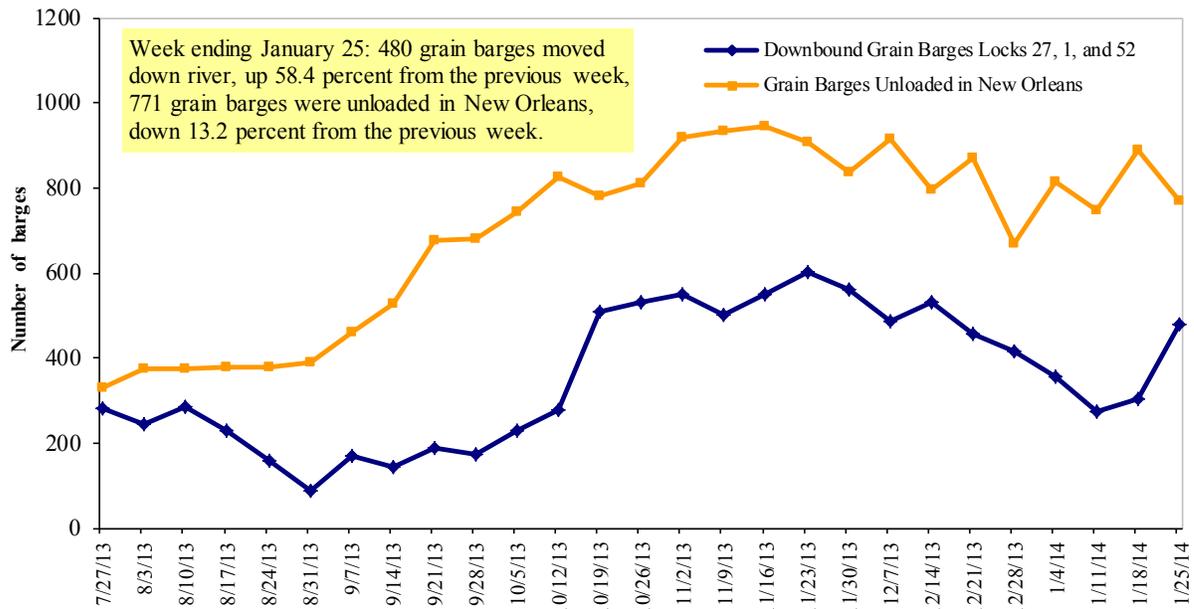
Source: U.S. Army Corps of Engineers

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 1/27/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.996	0.050	-0.027
	New England	4.171	0.053	-0.010
	Central Atlantic	4.144	0.084	0.038
	Lower Atlantic	3.852	0.023	-0.079
II	Midwest ²	3.874	0.044	0.008
III	Gulf Coast ³	3.772	0.001	-0.073
IV	Rocky Mountain	3.863	0.003	0.127
V	West Coast	3.979	0.013	-0.070
	West Coast less California	3.875	0.014	-0.071
	California	4.068	0.012	-0.069
Total	U.S.	3.904	0.031	-0.023

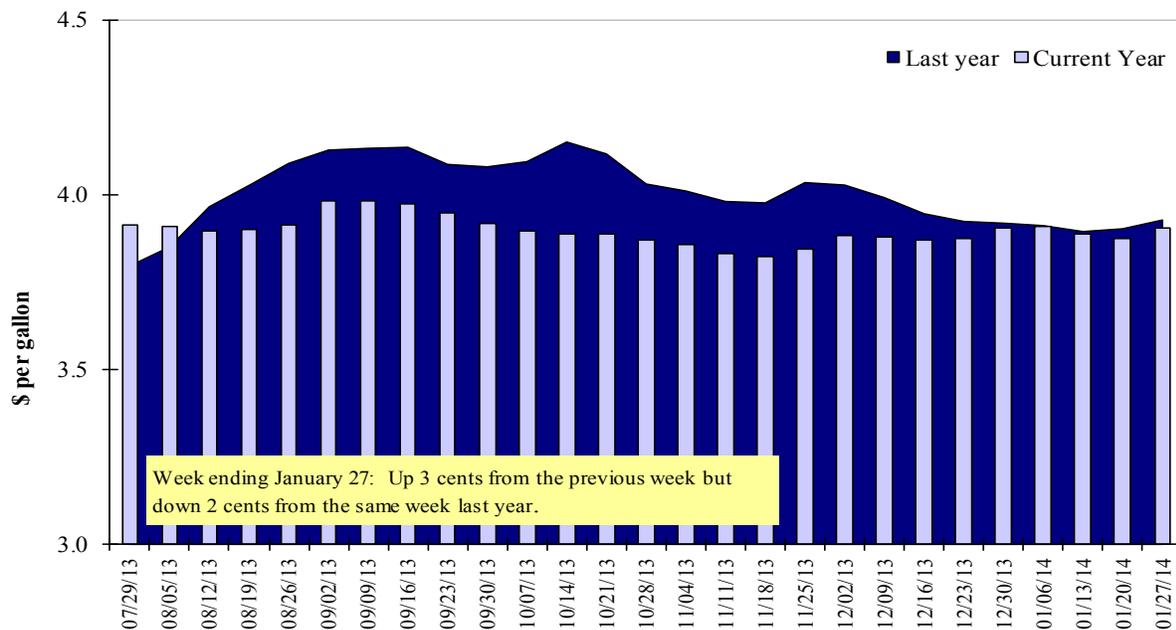
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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)

Week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances¹									
1/16/2014	1,522	967	1,431	813	151	4,883	16,784	13,979	35,646
This week year ago	1,897	1,680	1,202	1,077	109	5,965	5,994	8,352	20,311
Cumulative exports-marketing year²									
2013/14 YTD	7,977	5,835	3,753	2,581	283	20,428	13,313	28,170	61,911
2012/13 YTD	5,709	1,879	3,656	2,885	318	14,448	7,306	24,589	46,343
YTD 2013/14 as % of 2012/13	140	311	103	89	89	141	182	115	134
Last 4 wks as % of same period 2012/13	82	63	123	80	128	85	282	185	184
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293
2011/12 Total	9,904	4,319	6,312	5,601	491	26,627	37,900	36,727	101,254

¹ Current unshipped export sales to date

² Shipped export sales to date; new marketing year 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

Week ending 1/16/2014	Total Commitments ²		% change current MY from last MY	Exports ³ 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	5,486	4,352	26	7,000
Mexico	8,127	3,077	164	4,370
China	4,922	1,585	210	2,450
Venezuela	433	283	53	1,158
Taiwan	759	345	120	512
Top 5 Importers	19,727	9,642	105	15,490
Total US corn export sales	30,096	13,301	126	18,670
% of Projected	82%	72%		
Change from prior week	629	139		
Top 5 importers' share of U.S. corn export sales	66%	72%		83%
USDA forecast, January 2014	36,896	18,601	98	
Corn Use for Ethanol USDA forecast, January 2014	127,000	118,059	8	

(n) indicates negative number.

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

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

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

Table 14

Top 5 Importers¹ of U.S. Soybeans

Week Ending 1/16/2014	Total Commitments ²		% change current MY from last MY	Exports ³ 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	27,082	19,867	36	21,522
Mexico	2,003	1,553	29	2,565
Japan	1,171	1,201	(3)	1,751
Indonesia	1,302	764	70	1,682
Taiwan	933	849	10	1,120
Top 5 importers	32,491	24,234	34	28,641
Total US soybean export sales	42,149	32,941	28	37,060
% of Projected	103%	92%		
Change from prior week	696	307		
Top 5 importers' share of U.S. soybean export sales	77%	74%		
USDA forecast, January 2014	40,736	35,967	13	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.²Cumulative 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

Week Ending 1/16/2014	Total Commitments ²		% change current MY from last MY	Exports ³ 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	1,980	2,751	(28)	3,544
Nigeria	2,196	2,297	(4)	3,002
Mexico	2,397	2,412	(1)	2,761
Philippines	1,454	1,701	(14)	1,965
Egypt	150	223	(33)	1,678
Korea	1,008	1,292	(22)	1,385
Taiwan	736	810	(9)	1,038
China	4,197	580	624	743
Brazil	3,592	89	3936	527
Colombia	619	459	35	600
Top 10 importers	18,330	12,613	45	17,243
Total US wheat export sales	25,311	20,413	24	26,348
% of Projected	83%	74%		
Change from prior week	421	573		
Top 10 importers' share of U.S. wheat export sales	72%	62%		65%
USDA forecast, January 2014	30,654	27,439	12	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.²Cumulative 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 01/23/14	Previous Week ¹	Current Week as % of Previous	2014 YTD ¹	2013 YTD ¹	2014 YTD as % of 2013 YTD	Last 4-weeks as % of		Total ¹ 2013
							2013	3-yr. avg.	
Pacific Northwest									
Wheat	171	245	70	913	880	104	136	128	11,585
Corn	138	109	126	379	321	118	153	110	2,973
Soybeans	518	396	131	1,699	989	172	129	157	9,090
Total	827	750	110	2,991	2,190	137	134	138	23,647
Mississippi Gulf									
Wheat	79	13	595	385	340	113	132	111	9,711
Corn	473	528	90	1,678	754	223	311	127	14,828
Soybeans	1,195	908	132	4,028	2,904	139	132	141	21,462
Total	1,747	1,449	121	6,092	3,998	152	158	135	46,002
Texas Gulf									
Wheat	104	153	68	468	360	130	173	96	9,039
Corn	0	34	0	60	2	n/a	n/a	705	255
Soybeans	0	78	0	186	73	256	393	200	908
Total	104	265	39	714	435	164	234	125	10,203
Interior									
Wheat	21	12	175	74	117	63	166	94	1,244
Corn	120	84	143	393	158	249	143	113	3,943
Soybeans	86	95	91	354	319	111	223	109	3,212
Total	227	191	119	821	594	138	69	110	8,399
Great Lakes									
Wheat	0	0	n/a	0	2	0	n/a	0	884
Corn	0	0	n/a	0	0	n/a	n/a	0	0
Soybeans	0	0	n/a	0	1	0	95	157	699
Total	0	0	n/a	0	4	0	95	157	1,583
Atlantic									
Wheat	7	0	n/a	7	24	30	n/a	0	645
Corn	0	0	n/a	2	0	n/a	n/a	36	242
Soybeans	105	50	213	309	239	129	162	180	1,652
Total	113	50	227	318	263	121	166	129	2,540
U.S. total from ports²									
Wheat	382	424	90	1,847	1,724	107	143	113	33,108
Corn	730	755	97	2,513	1,235	204	223	105	22,241
Soybeans	1,905	1,526	125	6,575	4,526	145	156	168	37,024
Total	3,018	2,705	112	10,936	7,484	146	165	138	92,373

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

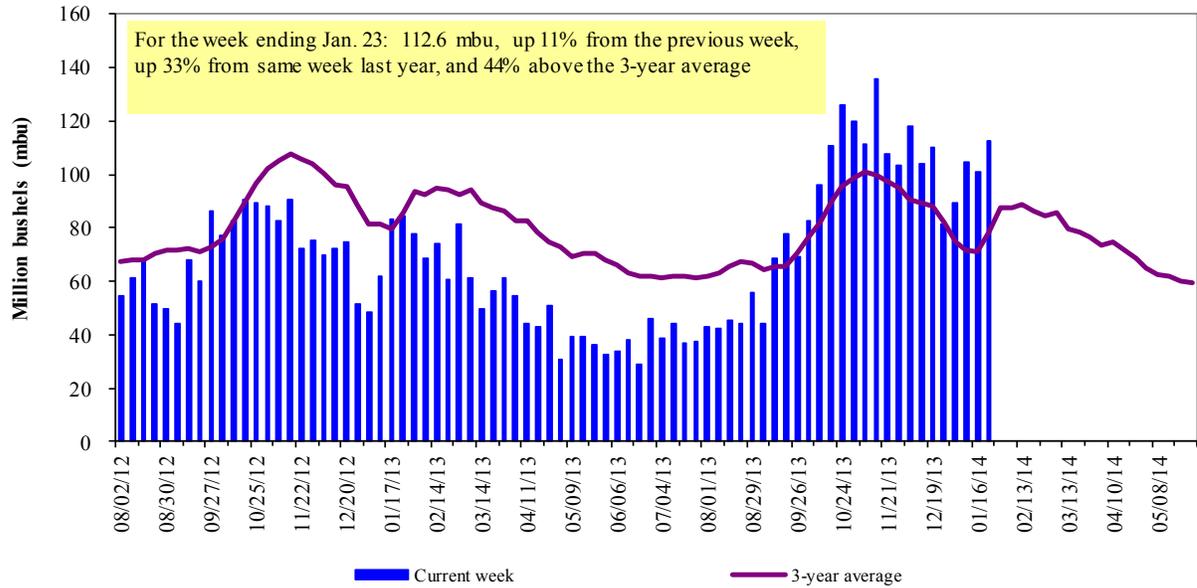
² Total includes only port regions shown above; Interior land-based shipments now included.

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 56 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2012.

Figure 14

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

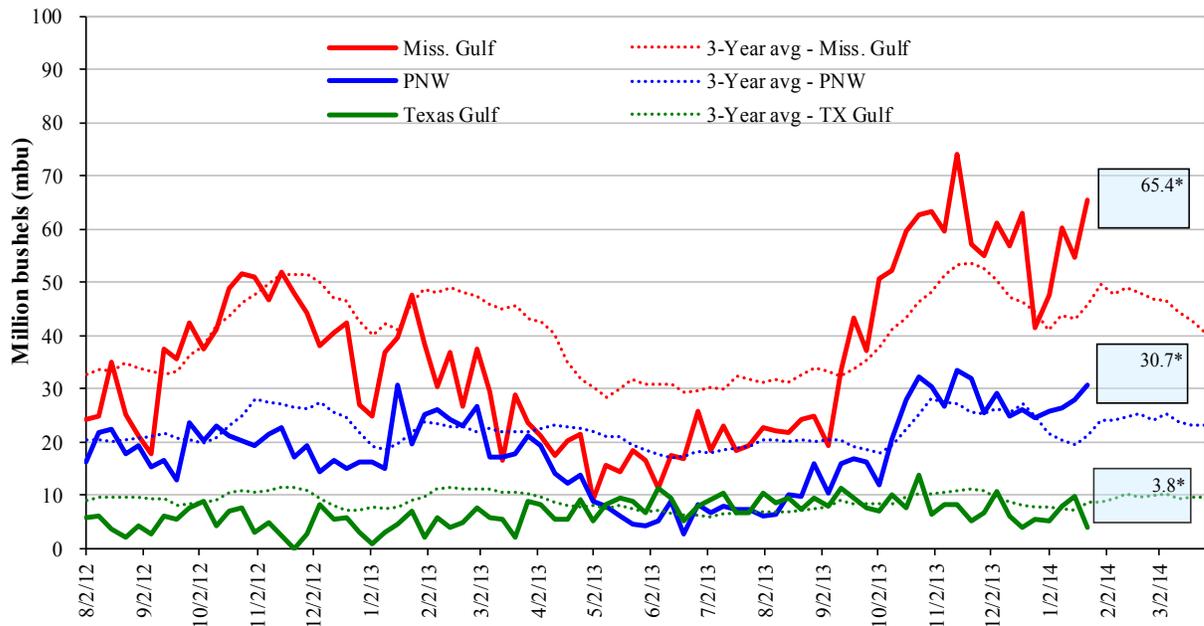


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

Jan. 23 : % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	up 20	down 61	up 8	up 10
Last year (same week)	up 37	down 46	up 27	up 57
3-yr avg. (4-wk mov. avg)	up 57	down 44	up 43	up 43

Ocean Transportation

Table 17

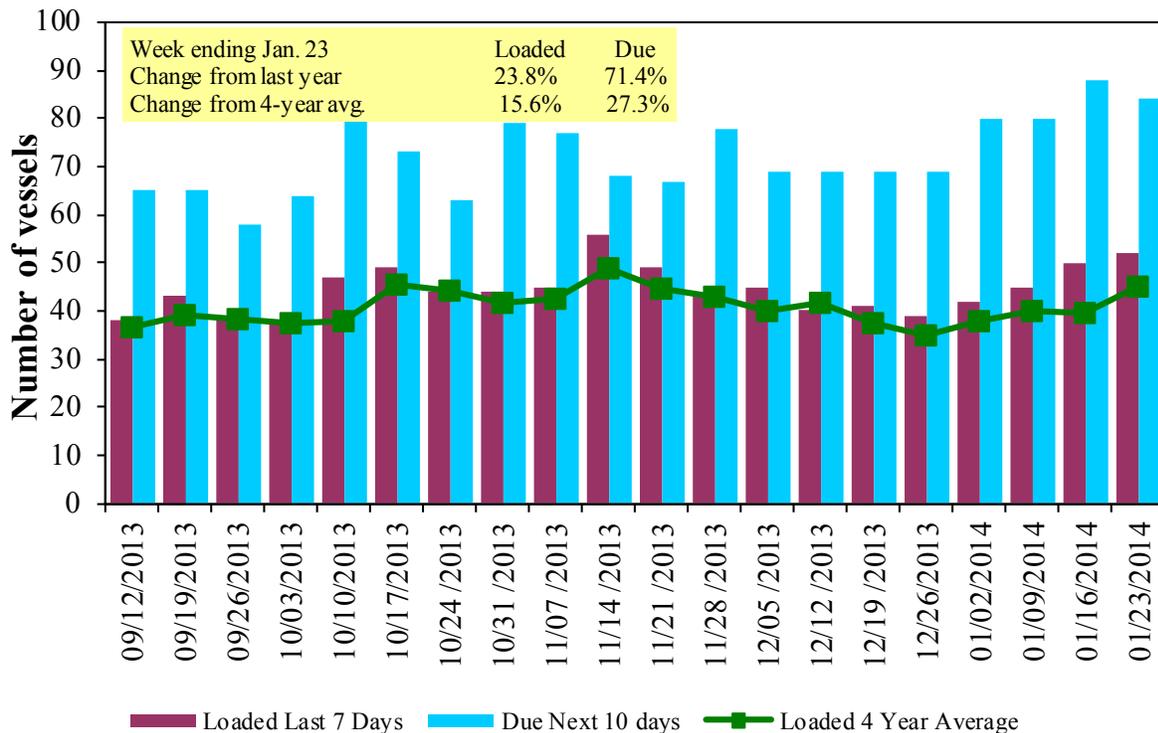
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
1/23/2014	68	52	84	15	n/a
1/16/2014	67	50	88	19	n/a
2013 range	(16..60)	(20..56)	(31..81)	(0..24)	n/a
2013 avg.	32	33	51	12	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

U.S. Gulf¹ Vessel Loading Activity

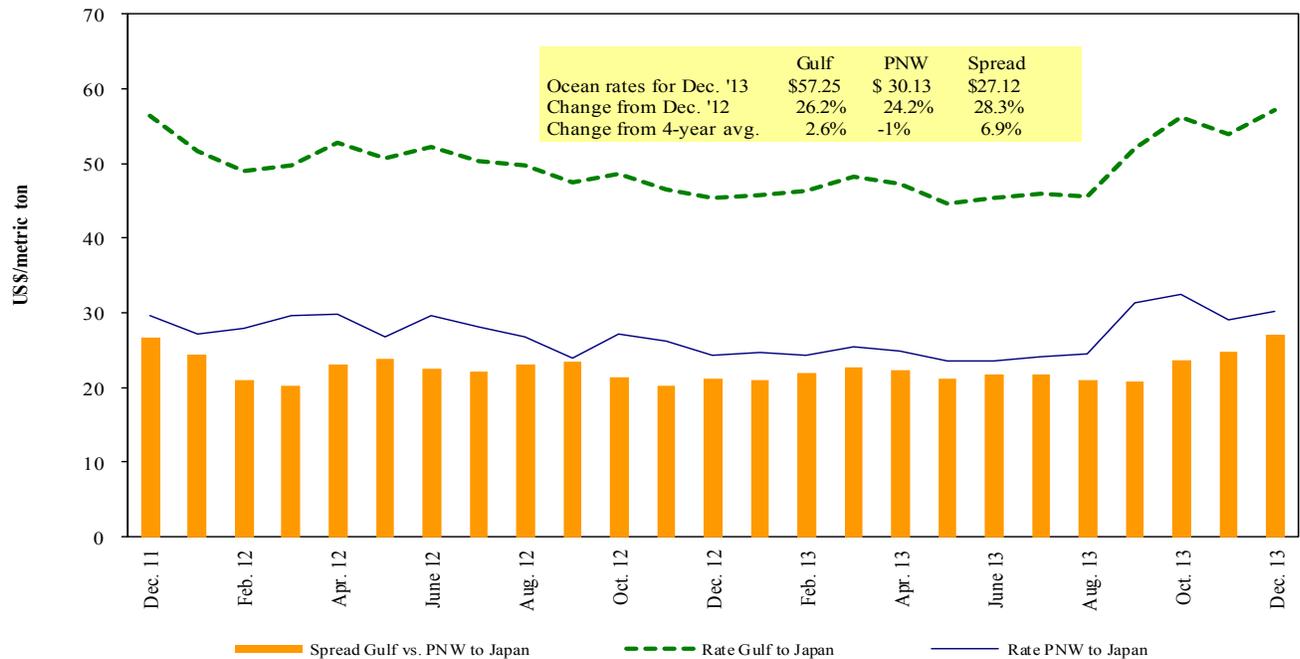


Source: Transportation & Marketing Programs/AMS/USDA

¹U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 1/25/2014

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Feb 1/10	60,000	54.00
U.S. Gulf	China	Heavy Grain	Jan 20/30	55,000	53.50
U.S. Gulf	China	Heavy Grain	Jan 15/30	55,000	55.00
U.S. Gulf	China	Heavy Grain	Jan 15/30	55,000	47.50
U.S. Gulf	China	Heavy Grain	31-Jan	58,000	56.50
U.S. Gulf	China	Heavy Grain	Dec 15/25	60,000	54.00
U.S. Gulf	China	Heavy Grain	Dec 10/20	55,000	49.00
U.S. Gulf	China	Heavy Grain	Jan 1/15	55,000	58.00
U.S. Gulf	China	Heavy Grain	Jan 1/10	60,000	57.50
U.S. Gulf	Djibouti ¹	Wheat	Jan 10/20	35,880	158.85
U.S. Gulf	S. Korea	Heavy Grain	Dec 5/20	58,000	54.00
Brazil	Rotterdam	Soybean Meal	Jan 20/29	30,000	33.00
France	Algeria	Heavy Grain	Dec 10/20	25,000	27.50
Ukraine	Sp Mediterranean	Grain	Dec 26/31	60,000	17.00

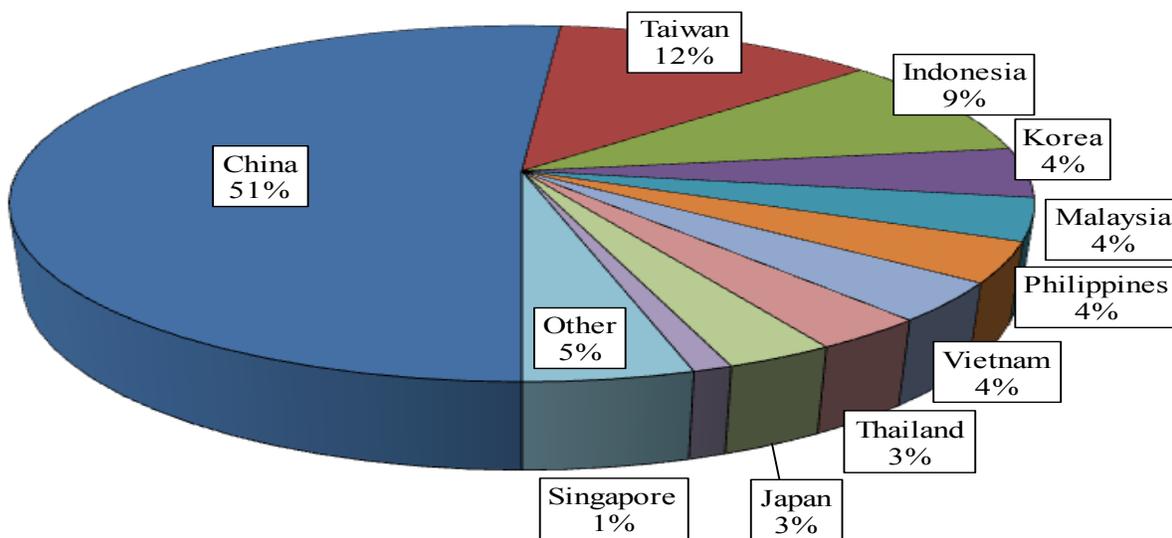
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

¹50 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 2012, containers were used to transport 8 percent of total U.S. waterborne grain exports, up 1 percentage point from 2011. Approximately 66 percent of U.S. waterborne grain exports in 2012 went to Asia, of which 11 percent were moved in containers. Asia is the top destination for U.S. containerized grain exports—96 percent in 2012.

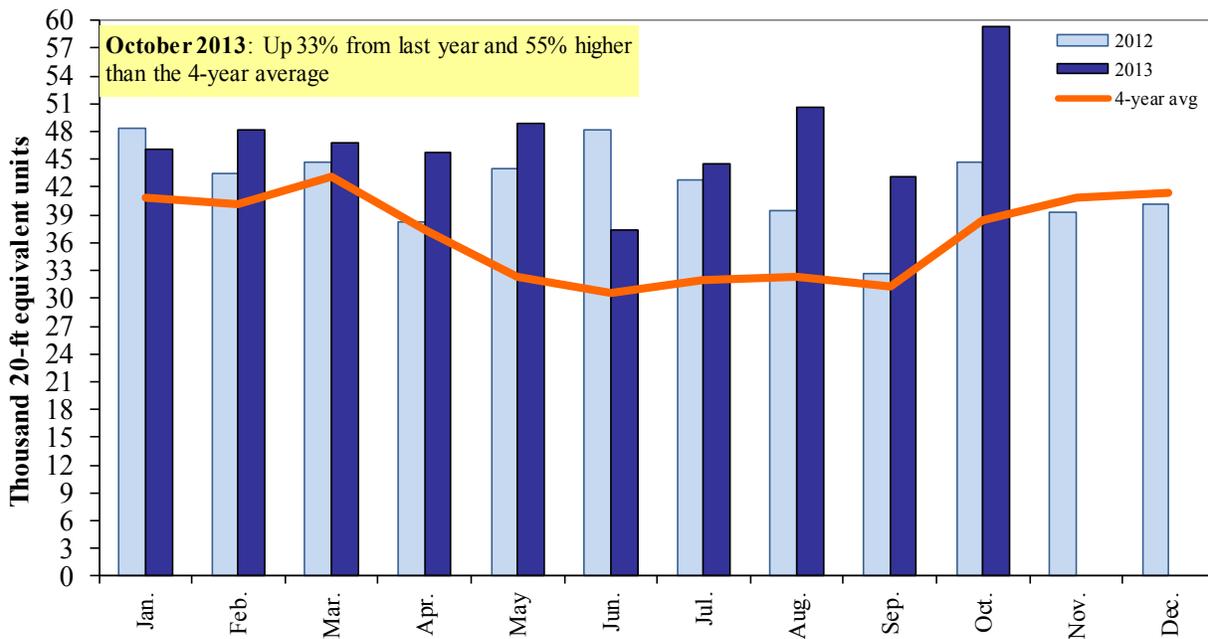
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, October 2013



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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