



United States
Department of
Agriculture

Agricultural
Marketing
Service

March 21, 2013

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Grain Transportation Report

A weekly publication of the
Transportation and Marketing Programs/Transportation Services Division
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WEEKLY HIGHLIGHTS

Mississippi River Levels Adequate for Short-Term

In March, water levels on the Mississippi River have risen considerably and have been adequate for navigation because rain and snow storms have supplied water for normal barge drafts of 9 feet or greater. As of March 21, the Mississippi River at St. Louis, MO, was at an 18 foot gage, significantly higher than the January average of -3 feet. In addition, the U.S. Army Corps of Engineers (Corps) has completed the removal of the rock formations that could have halted barge traffic between St. Louis and Cairo, IL, in December.

Drought Control Measures Will Limit Missouri River Flows

According to the U.S. Army Corps of Engineers (Corps), soil moisture and snowpack data indicate that the 2013 runoff in the Missouri River basin above the navigable portion of the Missouri River will be 81 percent of normal for the calendar year. As a result, the Corps enacted drought conservation measures on the water releases from the Missouri River that augment the Mississippi River flows in the St. Louis area. The Corps will also implement a plan that will provide an 8-foot draft and a 200-foot wide channel, and barge operators on the Missouri River will probably light-load barges. However, the restricted navigation on the Missouri River is not expected to significantly disrupt the overall movement of food and farm products via the inland waterways, as only 71,068 tons moved via the Missouri River in 2010, compared to about 152 million tons on the Mississippi River. It is unknown at this point whether restricted flows on the Missouri River will significantly impact water levels on the Mississippi River later in the spring or summer.

Soybean Inspections Reach Low for the Year

For the week ending March 14, the total amount of soybeans inspected for export from all major export regions reached .243 million metric tons (mmt), down 50 percent from the past week and the lowest since August 25, 2011 (.230 mmt). Inspections of soybeans dropped as the Brazil soybean harvest began to intensify. Corn inspections (.392 mmt), however, increased 6 percent from the past week and were 7 percent above the 4-week running average. Shipments of corn to Mexico and Asia rebounded. Wheat inspections decreased 17 percent from the past week, but inspections of wheat during the last 4 weeks were 23 percent above last year and 19 percent above the 3-year average. Outstanding (unshipped) export sales were also up for wheat but down slightly for corn and soybeans. Total inspections of all major grains reached 1.29 mmt, down 21 percent from the past week and 29 percent below last year at this time.

EIA Expects Diesel Prices to Fall through 2014; Truck Rates Expected to Rise

During the week ending March 18, U.S. average **diesel fuel prices** fell 4 cents from the previous week to \$4.05 per gallon—10 cents lower than the same week last year. Over the past 3 weeks, diesel prices have decreased 11 cents. The Energy Information Administration reports that, “Crude oil prices declined in the latter half of February and into the first week of March,” keeping downward pressure on diesel prices. Additionally, EIA expects both crude oil and diesel fuel prices to fall through 2014. Diesel fuel prices are expected to average \$3.90 in 2013, down from \$3.97 in 2012, and \$3.80 in 2014. However, while diesel prices are expected to fall, truck freight rates are expected to increase in 2013 and continue in 2014, according to a recent article in *Today’s Trucking*, quoting FTR Associates. A recent uptick in the FTR truck freight index reflects improved freight growth and expectation for tighter capacity, reported FTR.

Snapshots by Sector

Rail

U.S. railroads originated 17,625 **carloads of grain** during the week ending March 9, up 2 percent from last week, down 17 percent from last year, and 22 percent lower than the 3-year average.

During the week ending March 14, average March non-shuttle **secondary railcar bids/offers per car** were \$12.50 below tariff, down \$6 from last week. Average shuttle bids/offers were \$3 above tariff, up \$34.50 from last week.

Ocean

During the week ending March 14, 27 **ocean-going grain vessels** were loaded in the Gulf, 25 percent less than the same period last year. Thirty-eight vessels are expected to be loaded within the next 10 days, 5 percent less than the same period last year.

During the week ending March 15, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$48 per mt, unchanged from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$25 per mt, unchanged from the previous week.

Barge

During the week ending March 16, **barge grain movements** totaled 442,827 tons, 21 percent lower than the previous week, but 20.8 percent higher than the same period last year.

During the week ending March 16, 290 grain barges **moved down river**, down 23 percent from last week; 448 grain barges were **unloaded in New Orleans**, up 18 percent from the previous week.

Feature Article/Calendar

Grain Transportation Costs Increased for Water Route to Mexico and Decreased for Land Route

Increased barge rates pushed up the transportation costs of shipping corn, soybeans, and wheat from the United States to Veracruz, Mexico during the fourth quarter, but the costs of shipping by land to Guadalajara decreased. The costs of transporting by land decreased mainly because of the significant reduction in truck rates during the quarter. The transportation costs of shipping U.S. corn and soybeans to Veracruz increased by 6 percent, and the cost of shipping wheat increased by 1 percent (table). The costs of shipping corn and wheat by land decreased by 3 percent, and the costs of shipping soybeans remained about the same.

Quarterly costs of transporting U.S. grain to Mexico										
	Water route (to Veracruz)					Land route (to Guadalajara)				
	\$/metric ton					\$/metric ton				
	2011 4 th qtr.	2012 3 rd qtr.	2012 4 th qtr.	Percent change Yr. to Yr.	Qtr. to Qtr.	2011 4 th qtr.	2012 3 rd qtr.	2012 4 th qtr.	Percent change Yr. to Yr.	Qtr. to Qtr.
Corn										
Origin	IL					IA				
Truck	10.22	13.51	10.86	6.3	-19.6	3.54	7.46	3.47	-2.0	-53.5
Rail ¹						86.54	86.22	87.65	1.3	1.7
Ocean ²	21.21	18.53	16.73	-21.1	-9.7					
Barge	22.70	21.69	29.26	28.9	34.9					
Total transportation cost	54.13	53.73	56.85	5.0	5.8	90.08	93.68	91.12	1.2	-2.7
Farm Value	232.14	285.55	271.51	17.0	-4.9	225.32	287.39	272.43	20.9	-5.2
Landed Cost	286.27	339.28	328.36	14.7	-3.2	315.40	381.07	363.55	15.3	-4.6
Transport % of landed cost	19	16	17			29	25	25		
Soybeans										
Origin	IL					NE				
Truck	10.22	13.51	10.86	6.3	-19.6	3.54	7.46	3.47	-2.0	-53.5
Rail ¹						88.69	88.05	91.79	3.5	4.2
Ocean ²	21.21	18.53	16.73	-21.1	-9.7					
Barge	22.70	21.69	29.26	28.9	34.9					
Total transportation cost	54.13	53.73	56.85	5.0	5.8	92.23	95.51	95.26	3.3	-0.3
Farm Value	436.03	557.28	531.56	21.9	-4.6	421.33	558.50	516.86	22.7	-7.5
Landed Cost	490.16	611.01	588.41	20.0	-3.7	513.56	654.01	612.12	19.2	-6.4
Transport % of landed cost	11	9	10			18	15	16		
Wheat										
Origin	KS					KS				
Truck	32.36	29.38	26.85	-17.0	-8.6	3.54	7.46	3.47	-2.0	-53.5
Rail ¹						83.67	82.49	83.71	0.0	1.5
Ocean ²	21.21	18.53	16.73	-21.1	-9.7					
Barge	15.39	18.69	23.79	54.6	27.3					
Total transportation cost	68.96	66.60	67.37	-2.3	1.2	87.21	89.95	87.18	0.0	-3.1
Farm Value	246.80	303.63	309.26	25.3	1.9	246.80	303.63	309.26	25.3	1.9
Landed Cost	315.76	370.23	376.63	19.3	1.7	334.01	393.58	396.44	18.7	0.7
Transport % of landed cost	22	18	18			26	23	22		

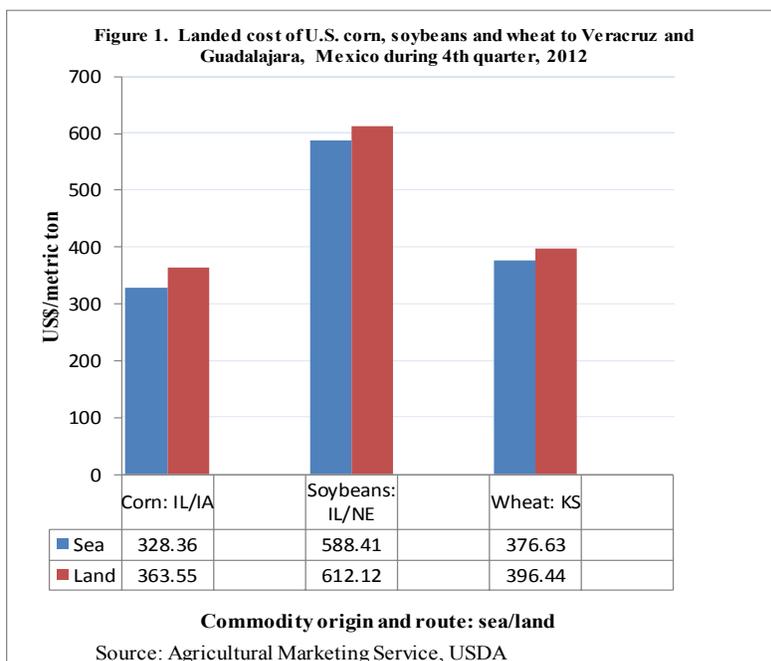
¹Rail rates include U.S. and Mexico portions of the movement. Mexico rail rates are estimated based on actual quoted market rates. BNSF and Union Pacific quoted rail tariff rates are through rates for shuttle trains.

Rail rates include fuel surcharges. Origins are modified from past tables. Rail rates for water route were revised from previous estimates

²Source: O'Neil Commodity Consulting

For the water route, decreases in the truck and ocean rates were not enough to offset an increase in barge rates, pushing up the transportation cost. Barge rates were up because of the seasonal fluctuation during harvest season. In addition, rates normally increase during the fourth quarter in anticipation of the closure of the Upper Mississippi River during winter. This year, rates also increased due to drought-related navigation restrictions ([GTR, 03-07-13](#)). Truck rates decreased partly due to a decline in trucking services demanded during the quarter ([GTR, 02-21-13](#)).

Farm prices fell for corn and soybeans, reducing their landed costs to Mexico, but increased for wheat. Landed costs for corn fell between 3 and 5 percent, and soybean landed costs fell between 4 and 6 percent. Wheat landed cost increased by 1-2 percent. Landed costs for the water route ranged from \$328.36 to \$588.41 per metric ton (mt) and, for the land route the range was \$363.55 to \$612.12 per mt (figure 1). The transportation share of landed costs ranged from 10 - 18 percent for the water route and 16 - 25 percent for the land route. Year-to-year landed costs increased significantly for all grain as U.S. farmers received more robust prices for their commodities, compared to a year earlier.



Market Outlook: Despite the year-to-year increase in the landed costs of U.S. grain, Mexico imported more wheat and soybeans in 2012, compared to 2011, and slightly less corn. Mexico imported about 8.5 million metric tons (mmt) of corn, 3.63 mmt of wheat, and 3.30 mmt of soybeans in 2012 (USDA, GATS). Total corn imports were valued at \$2.54 billion, wheat at \$1.12 billion, and soybeans at \$1.86 billion. Compared to a year earlier, corn imports were down 2 percent, wheat imports were up 13 percent, and soybean imports were up 4 percent. The import value decreased 4 percent for corn, increased 10 percent for wheat, and increased 13 percent for soybeans.

Mexico’s grain production was hampered by extremely dry weather during the marketing year (MY) 2011/12, resulting in irreversible yield losses. Although the rainy season was much better in 2012, it was not enough to offset the effect of the previous year’s drought. Hence, Mexico’s 2012/13 MY corn production estimate at 20 mmt is based on a smaller-than-expected planted area and irregular weather conditions (*GAIN Report #: MX 2073*). According to the USDA’s Foreign Agricultural Service, Mexican corn imports for 2012/13 MY are estimated at 12.2 mmt. Soybean imports for 2012/13 MY are forecast at 3.6 mmt—a 2.8 percent increase compared to 2011/12 MY. Strong soybean imports continue to be driven by a growing demand from Mexican consumers and the poultry and pork industries (*GAIN Report #: MX2073*). surajudeen.olowolayemo@ams.usda.gov

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
03/20/13	274	232	208	171	215	177
03/13/13	274	232	207	181	215	177

¹Indicator: Base year 2000 = 100; Weekly updates include truck = diesel (\$/gallon); rail = near-month secondary rail market bid and monthly tariff rate with fuel surcharge (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); and ocean = routes to Japan (\$/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

Market Update: U.S. Origins to Export Position Price Spreads (\$/bushel)

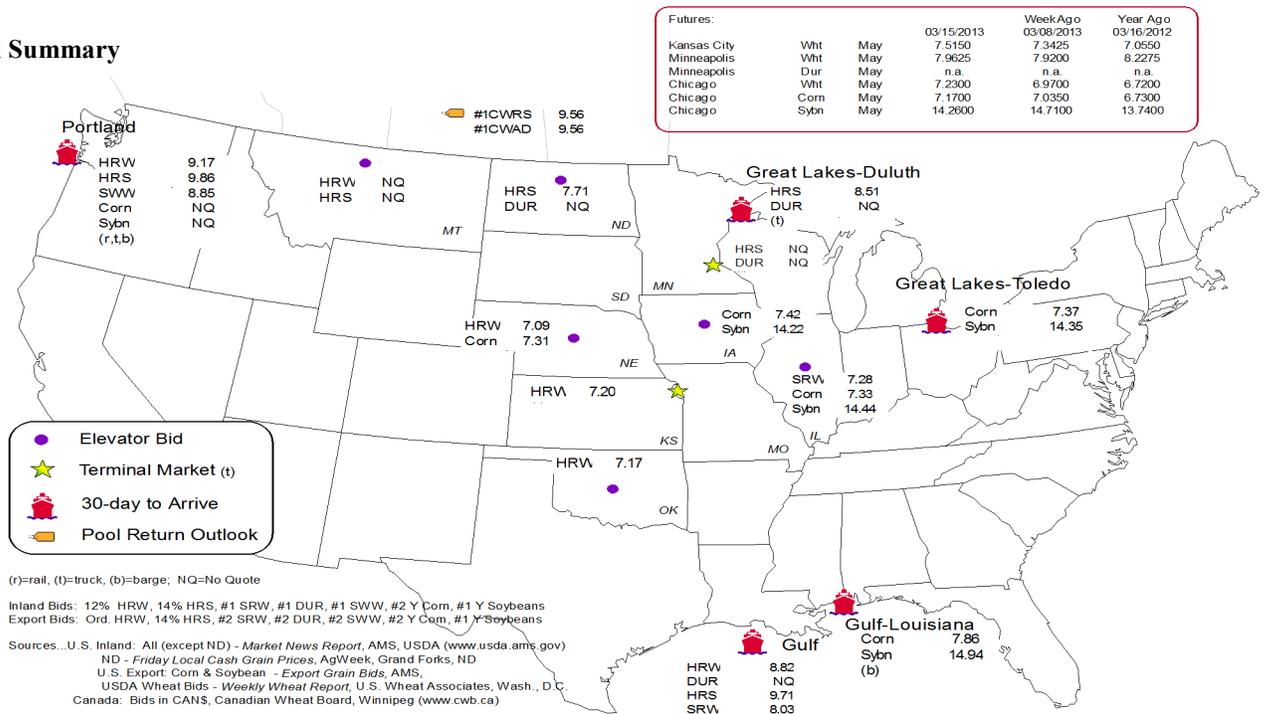
Commodity	Origin--Destination	3/15/2013	3/8/2013
Corn	IL--Gulf	-0.53	-0.58
Corn	NE--Gulf	-0.55	-0.56
Soybean	IA--Gulf	-0.72	-0.91
HRW	KS--Gulf	-1.62	-1.75
HRS	ND--Portland	-2.15	-2.33

Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1
Grain bid Summary



Rail Transportation

Table 3

Rail Deliveries to Port (carloads)¹

Week ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
03/13/2013 ^p	0	863	3,841	339	5,043	03/09/13	1,358
03/06/2013 ^r	47	932	4,194	465	5,638	03/02/13	839
2013 YTD ^r	7,433	8,725	46,653	7,534	70,345	2013 YTD	11,927
2012 YTD ^r	3,108	7,592	50,777	5,474	66,951	2012 YTD	22,498
2013 YTD as % of 2012 YTD	239	115	92	138	105	% change YTD	53
Last 4 weeks as % of 2012 ²	28	164	85	94	89	Last 4wks % 2012	49
Last 4 weeks as % of 4-year avg. ²	15	70	105	63	83	Last 4wks % 4 yr	60
Total 2012	22,604	40,780	199,419	32,193	287,462	Total 2011	97,118
Total 2011	27,358	77,515	191,187	24,088	320,148	Total 2010	90,175

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2011 and prior 4-year average.

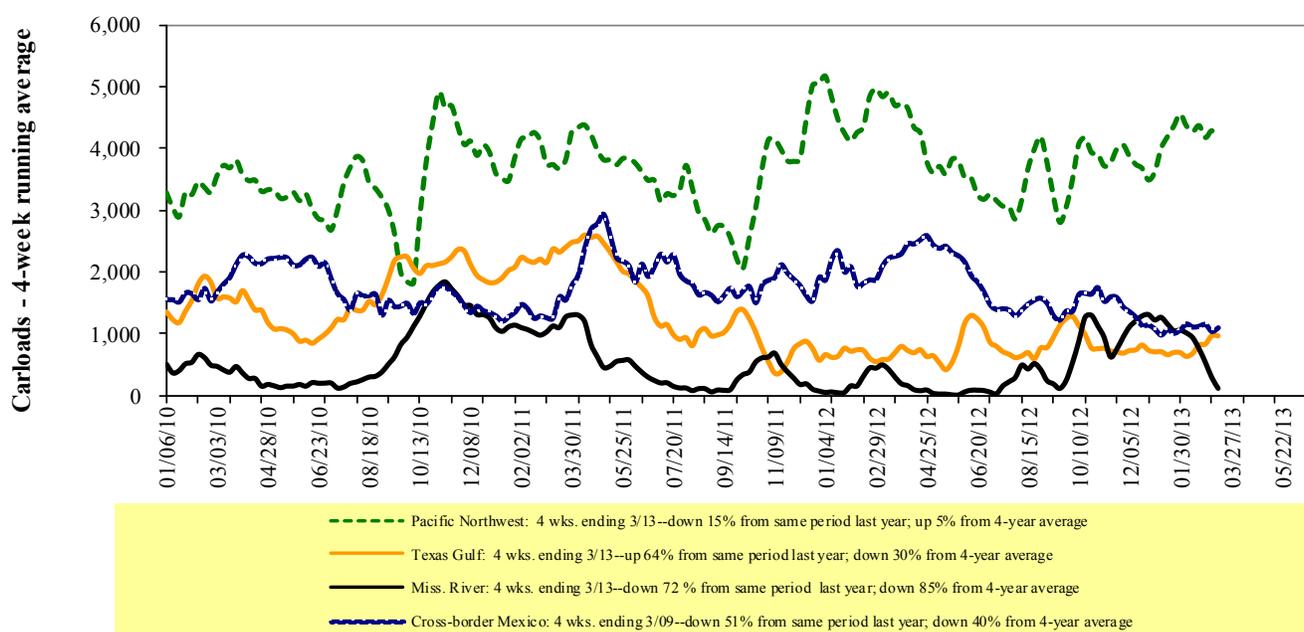
³ Cross-border weekly data is approximately 15 percent below weekly AAR carloads received by Mexican railroads to reflect within switching between KCSM and FerroMex
YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

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

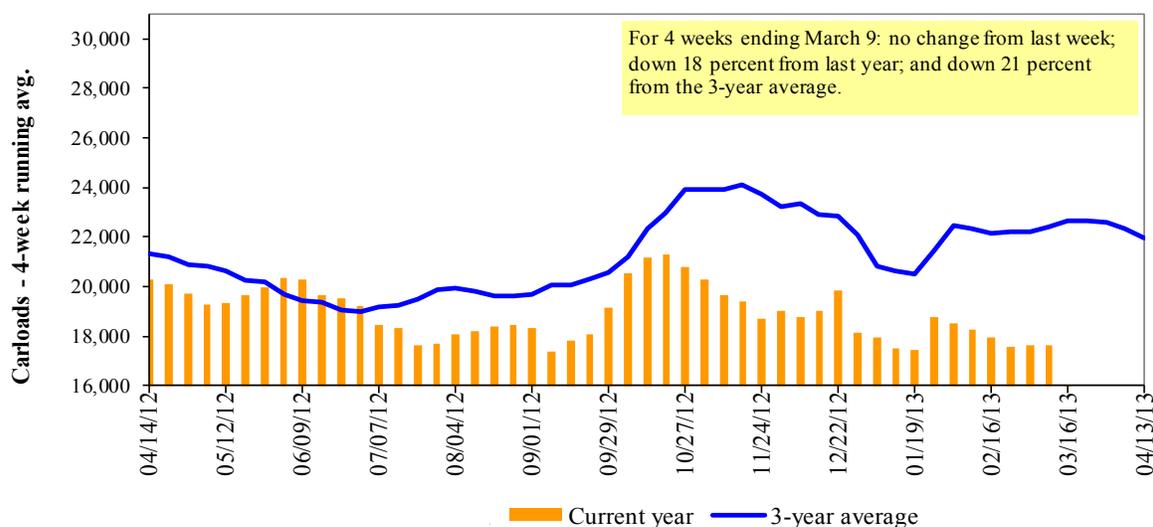
Class I Rail Carrier Grain Car Bulletin (grain carloads originated)

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
03/09/13	1,562	2,102	9,443	462	4,056	17,625	3,078	5,163
This week last year	1,963	2,637	11,565	454	4,548	21,167	3,489	5,469
2013 YTD	15,854	26,129	95,314	4,902	37,907	180,106	35,520	52,963
2012 YTD	21,602	29,727	103,123	4,884	50,886	210,222	37,849	51,728
2013 YTD as % of 2012 YTD	73	88	92	100	74	86	94	102
Last 4 weeks as % of 2012	68	84	88	102	73	82	82	93
Last 4 weeks as % of 3-yr avg. ¹	67	80	87	69	65	78	79	97
Total 2012	85,384	145,336	515,638	26,936	244,077	1,017,371	204,068	266,266

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							
	Mar-13	Mar-12	Apr-13	Apr-12	May-13	May-12	Jun-13	Jun-12
BNSF ³								
COT grain units	no offer	n/a	0	no bids				
COT grain single-car ⁵	no offer	n/a	0 . . 1	0	0	no bids	no bids	no bids
UP ⁴								
GCAS/Region 1	no offer	n/a	no bids	no bids	no bids	no bids	n/a	no offer
GCAS/Region 2	no offer	n/a	no bids	no bids	no bids	no bids	n/a	no offer

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.

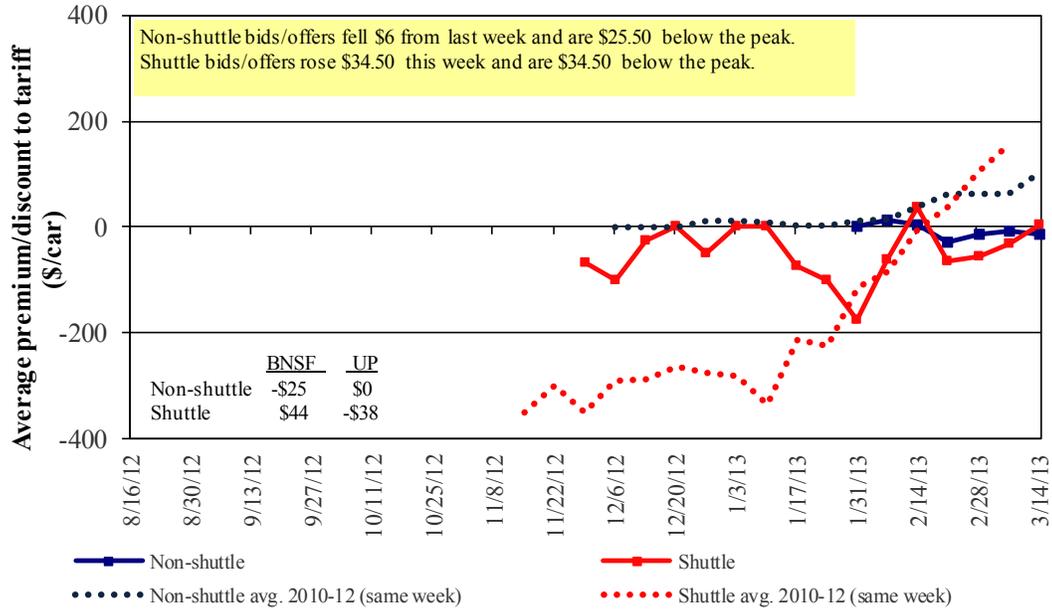
⁵Range is shown because average is not available. Not available = n/a.

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 March 2013, Secondary Market

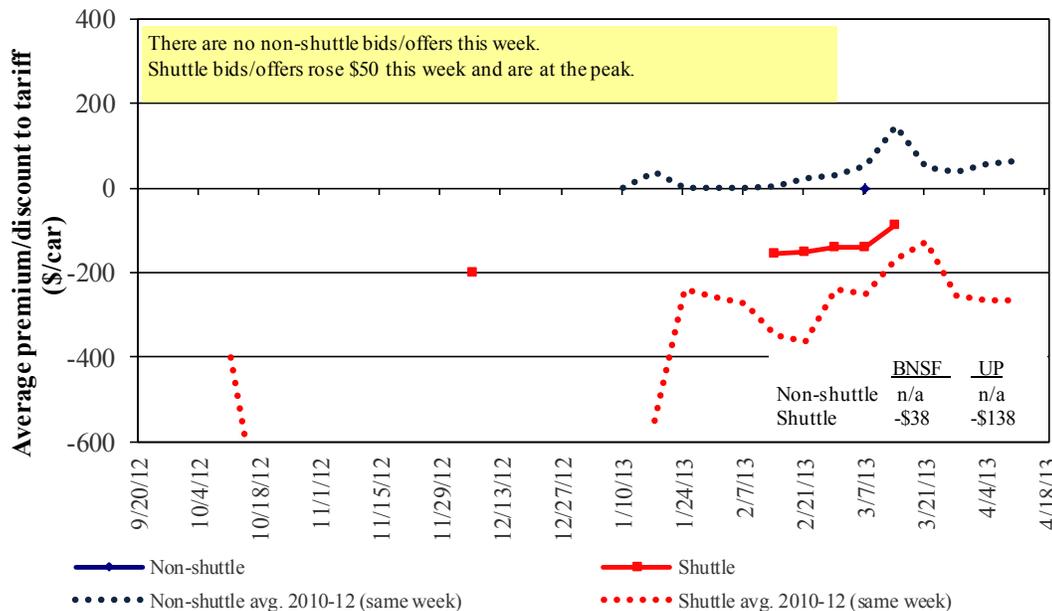


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in April 2013, Secondary Market

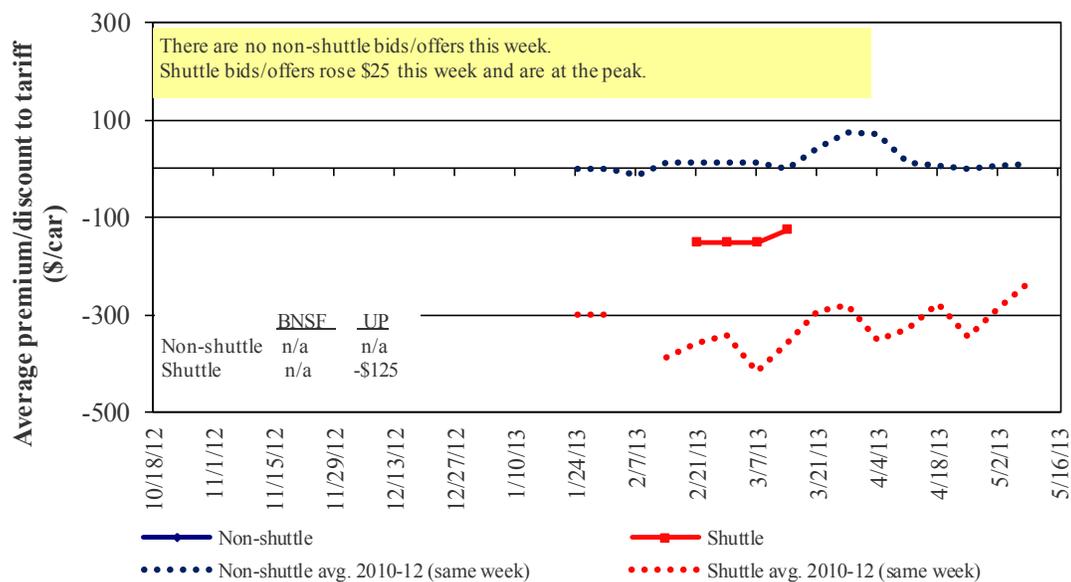


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in May 2013, 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					
	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13
Non-shuttle						
BNSF-GF	(25)	n/a	n/a	n/a	n/a	n/a
Change from last week	(12)	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	-	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 2011	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	44	(38)	n/a	n/a	n/a	n/a
Change from last week	69	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	n/a	168	n/a	n/a	n/a	n/a
UP-Pool	(38)	(138)	(125)	n/a	n/a	(100)
Change from last week	-	-	25	n/a	n/a	25
Change from same week 2011	n/a	62	175	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 Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

Effective date:						Percent	
3/1/2013	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		change Y/Y ³
					metric ton	bushe ²	
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,144	\$187	\$33.08	\$0.90	5
	Grand Forks, ND	Duluth-Superior, MN	\$3,543	\$107	\$36.25	\$0.99	9
	Wichita, KS	Los Angeles, CA	\$6,026	\$551	\$65.31	\$1.78	3
	Wichita, KS	New Orleans, LA	\$3,645	\$329	\$39.47	\$1.07	4
	Sioux Falls, SD	Galveston-Houston, TX	\$5,573	\$452	\$59.83	\$1.63	0
	Northwest KS	Galveston-Houston, TX	\$3,912	\$361	\$42.43	\$1.15	4
	Amarillo, TX	Los Angeles, CA	\$4,112	\$502	\$45.82	\$1.25	4
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,110	\$372	\$34.58	\$0.94	3
	Toledo, OH	Raleigh, NC	\$4,508	\$416	\$48.89	\$1.33	3
	Des Moines, IA	Davenport, IA	\$2,006	\$79	\$20.70	\$0.56	4
	Indianapolis, IN	Atlanta, GA	\$3,920	\$312	\$42.03	\$1.14	3
	Indianapolis, IN	Knoxville, TN	\$3,354	\$200	\$35.29	\$0.96	3
	Des Moines, IA	Little Rock, AR	\$3,154	\$232	\$33.62	\$0.92	3
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,065	\$675	\$57.00	\$1.55	2
	Minneapolis, MN	New Orleans, LA	\$3,579	\$402	\$39.53	\$1.08	2
	Toledo, OH	Huntsville, AL	\$3,575	\$295	\$38.43	\$1.05	2
	Indianapolis, IN	Raleigh, NC	\$4,578	\$419	\$49.62	\$1.35	3
	Indianapolis, IN	Huntsville, AL	\$3,267	\$200	\$34.43	\$0.94	3
Champaign-Urbana, IL	New Orleans, LA	\$3,599	\$372	\$39.44	\$1.07	6	
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,580	\$317	\$38.70	\$1.05	7
	Wichita, KS	Galveston-Houston, TX	\$3,634	\$247	\$38.54	\$1.05	12
	Chicago, IL	Albany, NY	\$3,771	\$390	\$41.32	\$1.12	4
	Grand Forks, ND	Portland, OR	\$5,061	\$547	\$55.69	\$1.52	5
	Grand Forks, ND	Galveston-Houston, TX	\$6,082	\$570	\$66.06	\$1.80	4
	Northwest KS	Portland, OR	\$4,880	\$592	\$54.34	\$1.48	3
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$666	\$54.28	\$1.48	1
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$610	\$53.33	\$1.45	1
	Champaign-Urbana, IL	New Orleans, LA	\$2,929	\$372	\$32.78	\$0.89	3
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$356	\$36.40	\$0.99	1
	Des Moines, IA	Amarillo, TX	\$3,510	\$291	\$37.75	\$1.03	3
	Minneapolis, MN	Tacoma, WA	\$4,800	\$661	\$54.23	\$1.48	1
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,200	\$684	\$48.50	\$1.32	1
	Sioux Falls, SD	Tacoma, WA	\$5,320	\$610	\$58.89	\$1.60	6
	Minneapolis, MN	Portland, OR	\$5,330	\$666	\$59.55	\$1.62	6
	Fargo, ND	Tacoma, WA	\$5,230	\$543	\$57.32	\$1.56	6
	Council Bluffs, IA	New Orleans, LA	\$3,950	\$429	\$43.49	\$1.18	6
	Toledo, OH	Huntsville, AL	\$2,750	\$295	\$30.24	\$0.82	3
Grand Island, NE	Portland, OR	\$5,195	\$606	\$57.60	\$1.57	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

Effective date: 3/1/2013

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	\$6,262	\$579	\$69.90	\$1.90	-17
	OK	Cautitlan, EM	\$6,552	\$703	\$74.13	\$2.02	-2
	KS	Guadalajara, JA	\$7,444	\$679	\$83.00	\$2.26	-2
	TX	Salinas Victoria, NL	\$3,553	\$265	\$39.01	\$1.06	-3
Corn	IA	Guadalajara, JA	\$7,699	\$799	\$86.82	\$2.20	-1
	SD	Celaya, GJ ⁵	\$8,113	\$757	\$90.63	\$2.30	n/a
	NE	Queretaro, QA	\$7,153	\$710	\$80.34	\$2.04	1
	SD	Salinas Victoria, NL	\$5,700	\$576	\$64.12	\$1.63	1
	MO	Tlalnepantla, EM	\$6,592	\$689	\$74.40	\$1.89	4
	SD	Torreon, CU	\$6,522	\$634	\$73.12	\$1.86	0
Soybeans	MO	Bojay (Tula), HG	\$7,580	\$674	\$84.34	\$2.29	7
	NE	Guadalajara, JA	\$8,134	\$771	\$90.99	\$2.47	1
	IA	El Castillo, JA	\$8,555	\$753	\$95.10	\$2.59	4
	KS	Torreon, CU	\$6,651	\$478	\$72.84	\$1.98	2
Sorghum	TX	Guadalajara, JA	\$6,464	\$493	\$71.08	\$1.80	-2
	NE	Celaya, GJ ⁵	\$6,997	\$688	\$78.51	\$1.99	n/a
	KS	Queretaro, QA	\$6,815	\$432	\$74.04	\$1.88	6
	NE	Salinas Victoria, NL	\$5,438	\$506	\$60.73	\$1.54	6
	NE	Torreon, CU	\$6,153	\$564	\$68.64	\$1.74	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

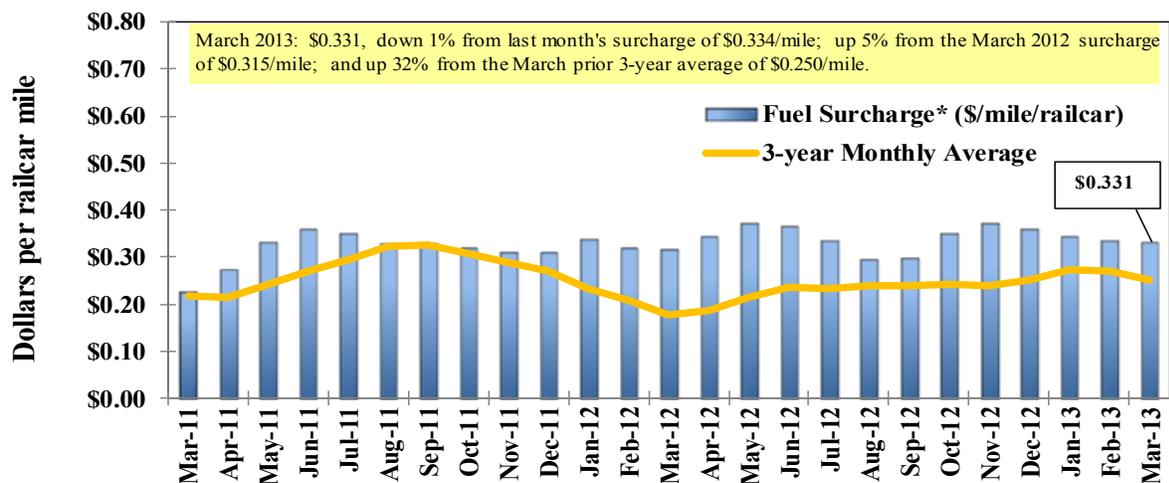
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

⁵Beginning 11/1/12, Celaya, GJ, replaced Penjamo, GJ, as the destination.

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.

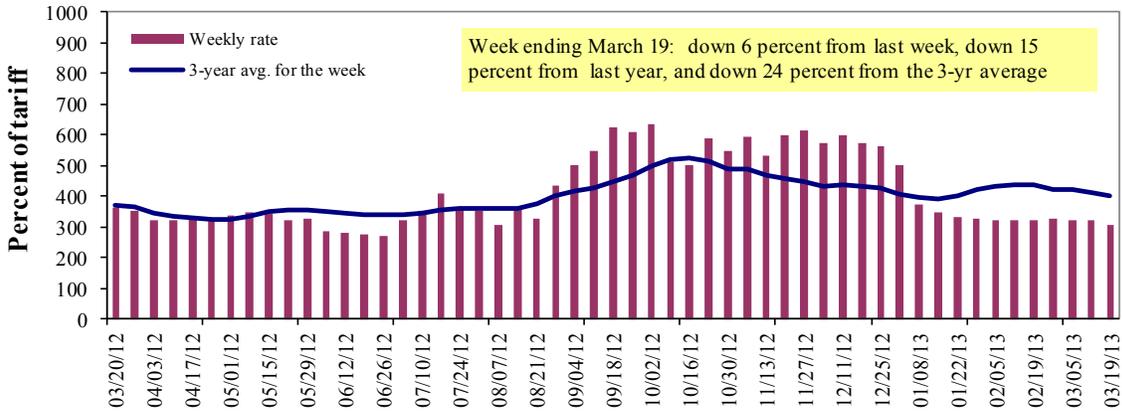
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

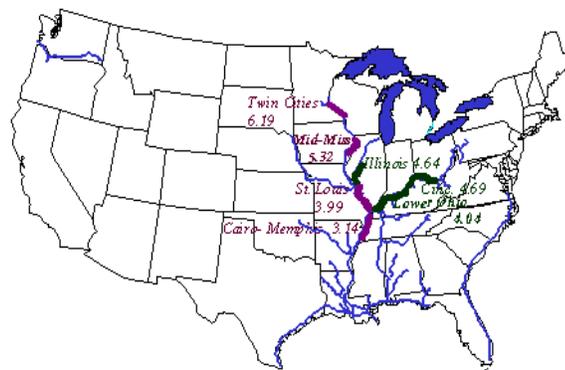
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid- Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo- Memphis
Rate¹	3/19/2013	-	312	307	250	208	208	185
	3/12/2013	-	340	325	250	223	223	185
\$/ton	3/19/2013	-	16.60	14.24	9.98	9.76	8.40	5.81
	3/12/2013	-	-	15.08	9.98	10.46	9.01	5.81
Current week % change from the same week:								
	Last year	-	-17	-15	-3	-33	-33	-17
	3-year avg. ²	-	-29	-24	-19	-40	-40	-32
Rate¹	April	330	298	285	245	205	205	185
	June	335	295	280	248	210	210	185

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; - closed for winter or no rates

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9
Benchmark tariff rates



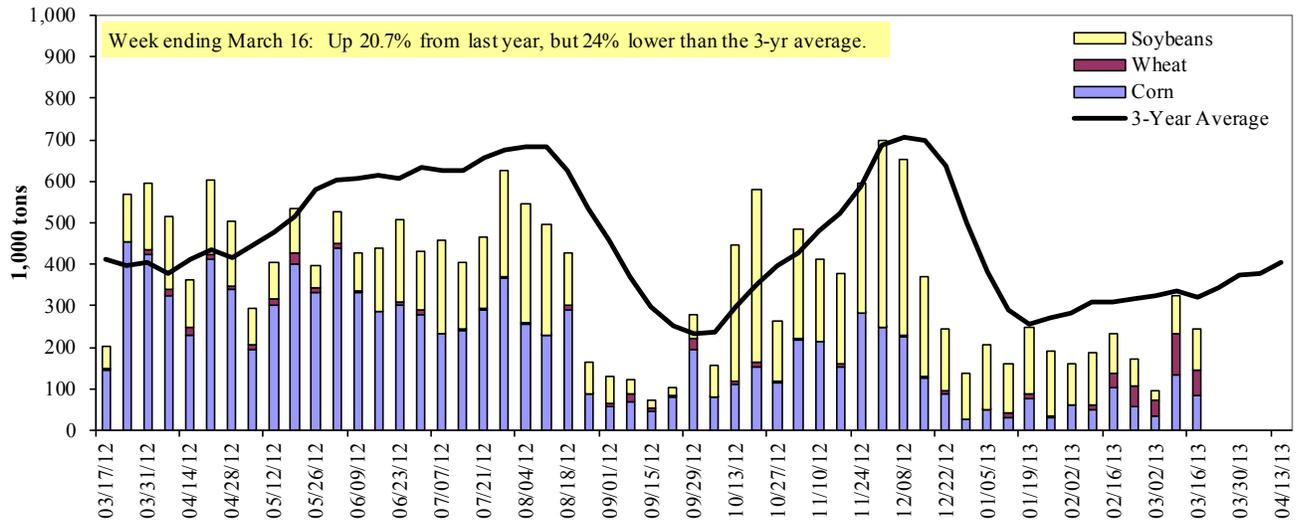
Calculating barge rate per ton:

$(\text{Index} * 1976 \text{ tariff benchmark rate per ton}) / 100$

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 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 3/16/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	6	0	6
Winfield, MO (L25)	28	2	49	0	79
Alton, IL (L26)	90	40	104	0	234
Granite City, IL (L27)	85	60	100	0	245
Illinois River (L8)	62	38	21	0	121
Ohio River (L52)	86	27	43	2	158
Arkansas River (L1)	1	28	10	0	39
Weekly total - 2013	173	116	153	2	443
Weekly total - 2012	200	29	130	8	367
2013 YTD ¹	1,219	936	2,746	51	4,953
2012 YTD	3,542	323	2,704	59	6,628
2013 as % of 2012 YTD	34	289	102	87	75
Last 4 weeks as % of 2012 ²	60	44	78	32	88
Total 2012	14,837	1,794	12,663	229	29,523

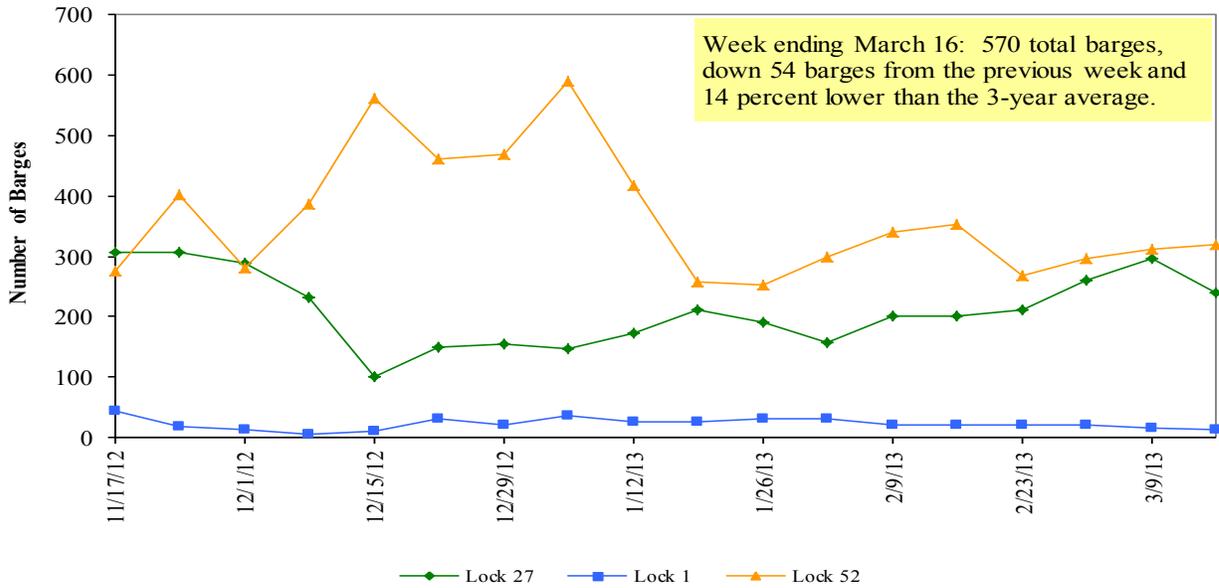
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2012.

Note: Total may not add exactly, due to rounding

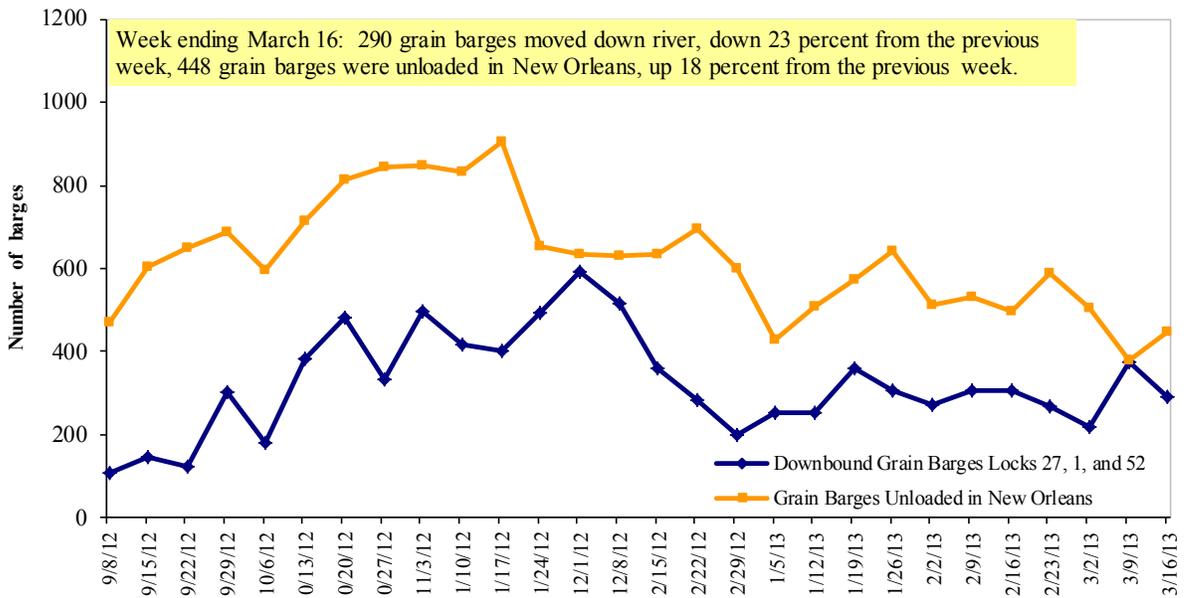
Source: U.S. Army Corps of Engineers

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 3/18/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.082	-0.038	-0.102
	New England	4.204	-0.039	-0.055
	Central Atlantic	4.140	-0.031	-0.129
	Lower Atlantic	4.016	-0.042	-0.090
II	Midwest ²	4.015	-0.028	-0.025
III	Gulf Coast ³	3.989	-0.047	-0.064
IV	Rocky Mountain	3.971	-0.039	-0.148
V	West Coast	4.162	-0.065	-0.269
	West Coast less California	4.105	-0.060	-0.267
	California	4.212	-0.068	-0.269
Total	U.S.	4.047	-0.041	-0.095

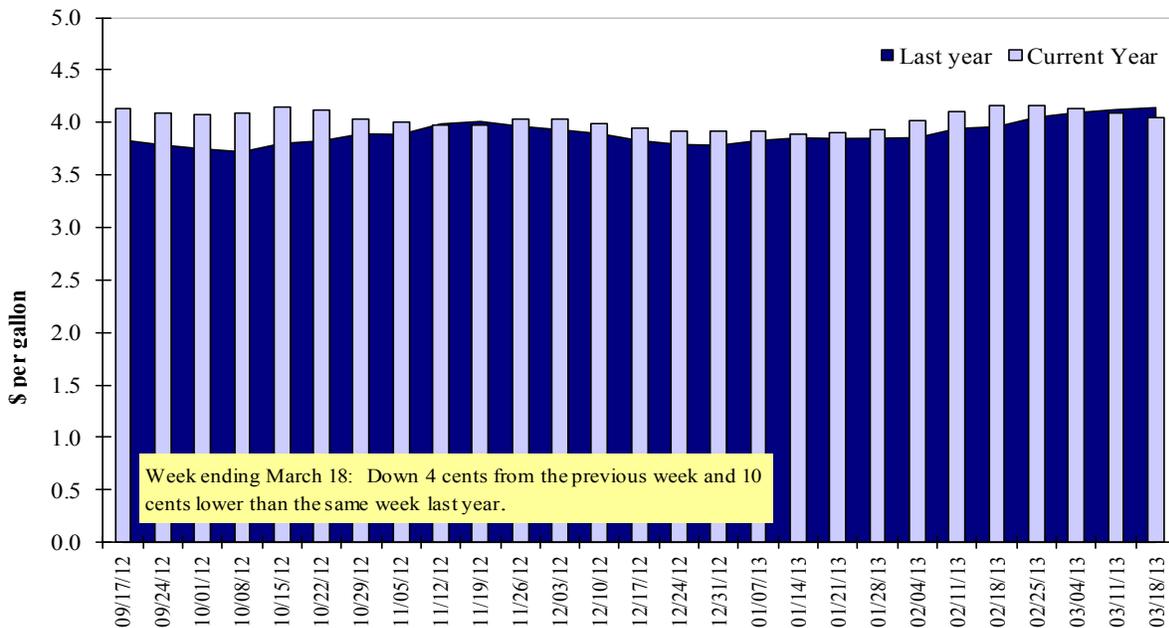
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
3/7/2013	1,848	1,511	1,230	782	97	5,467	4,934	3,826	14,227
This week year ago	1,283	834	1,145	1,392	44	4,699	10,078	5,387	20,164
Cumulative exports-marketing year²									
2012/13 YTD	7,074	3,286	4,364	3,672	363	18,760	9,845	31,672	60,277
2011/12 YTD	7,688	2,662	5,039	4,172	388	19,949	22,058	25,098	67,105
YTD 2012/13 as % of 2011/12	92	123	87	88	94	94	45	126	90
Last 4 wks as % of same period 2011/12	138	194	106	58	210	117	52	80	75
2011/12 Total	9,904	4,319	6,312	5,601	491	26,627	37,900	36,727	101,254
2010/11 Total	15,837	2,828	8,623	4,717	979	32,984	44,569	39,753	117,306

¹ Current unshipped export sales to date

² Shipped export sales to date; new marketing year begins 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 03/07/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	4,984	8,656	(42)	12,367
Mexico	3,404	8,186	(58)	9,617
China	2,139	3,794	(44)	5,414
Korea	360	3,376	(89)	3,639
Venezuela	396	665	(41)	1,332
Top 5 Importers	11,283	24,677	(54)	32,369
Total US corn export sales	14,779	32,136	(54)	39,180
% of Projected	71%	82%		
Change from prior week	282	837		
Top 5 importers' share of U.S. corn export sales	76%	77%		83%
USDA forecast, March 2013	20,960	39,180	(47)	
Corn Use for Ethanol USDA forecast, Ethanol March 2013	114,300	127,000	(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 (Carry-over plus Accumulated Exports)

Table 14

Top 5 Importers¹ of U.S. Soybeans

Week Ending 03/07/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	21,489	20,348	6	24,602
Mexico	1,873	2,171	(14)	3,180
Japan	1,430	1,404	2	1,891
Indonesia	1,109	1,027	8	1,741
Egypt	643	702	(8)	1,292
Top 5 importers	26,544	25,652	3	32,706
Total US soybean export sales	35,497	30,485	16	37,060
% of Projected	97%	82%		
Change from prior week	506	610		
Top 5 importers' share of U.S. soybean export sales	75%	84%		
USDA forecast, March 2013	36,610	37,060	(1)	

(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. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

Week Ending 03/07/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	3,248	3,353	(3)	3,512
Mexico	2,618	3,242	(19)	3,496
Nigeria	2,669	2,815	(5)	3,248
Philippines	1,789	1,929	(7)	2,039
Korea	1,372	1,773	(23)	1,983
Egypt	1,349	446	203	950
Taiwan	986	830	19	888
Indonesia	435	720	(39)	830
Venezuela	587	583	1	594
Iraq	209	572	(63)	572
Top 10 importers	15,261	16,261	(6)	18,111
Total US wheat export sales	24,227	24,648	(2)	28,560
% of Projected	87%	86%		
Change from prior week	889	292		
Top 10 importers' share of U.S. wheat export sales	63%	66%		63%
USDA forecast, March 2013	27,900	28,560	(2)	

(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/>³FAS 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 03/14/13	Previous Week ¹	Current Week as % of Previous	2013 YTD ¹	2012 YTD ¹	2013 YTD as % of 2012 YTD	Last 4-weeks as % of		Total ¹ 2012
							2012	3-yr. avg.	
Pacific Northwest									
Wheat	210	174	121	2,609	2,914	90	75	97	12,625
Corn	109	109	100	909	1,194	76	73	64	5,512
Soybeans	137	178	77	2,992	2,780	108	96	96	10,347
Total	457	461	99	6,509	6,888	94	82	89	28,484
Mississippi Gulf									
Wheat	215	357	60	1,863	1,168	160	192	218	5,462
Corn	195	211	92	2,043	5,194	39	51	39	18,068
Soybeans	28	216	13	5,874	6,282	93	61	56	24,684
Total	438	784	56	9,781	12,644	77	72	63	48,215
Texas Gulf									
Wheat	114	157	72	1,213	1,074	113	163	79	5,912
Corn	33	0	n/a	40	92	44	65	28	336
Soybeans	0	0	n/a	122	0	n/a	n/a	0	626
Total	147	157	93	1,375	1,166	118	150	64	6,874
Interior									
Wheat	21	10	213	205	218	94	357	53	1,218
Corn	55	49	110	498	1,887	26	123	29	6,115
Soybeans	54	63	86	949	942	101	48	92	4,204
Total	130	122	106	1,652	3,047	54	55	51	11,538
Great Lakes									
Wheat	5	1	n/a	8	0	n/a	n/a	191	481
Corn	0	0	n/a	0	14	0	n/a	0	56
Soybeans	0	1	n/a	3	1	233	150	450	713
Total	5	1	473	11	16	72	1,225	206	1,250
Atlantic									
Wheat	87	83	104	279	2	n/a	n/a	6,183	341
Corn	0	0	n/a	2	50	4	0	0	143
Soybeans	24	27	90	579	310	187	202	144	1,460
Total	111	110	101	860	361	238	357	233	1,944
U.S. total from ports²									
Wheat	653	782	83	6,177	5,375	115	123	119	26,040
Corn	392	370	106	3,492	8,430	41	48	40	30,230
Soybeans	243	484	50	10,520	10,317	102	79	72	42,035
Total	1,287	1,636	79	20,189	24,123	84	79	71	98,305

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

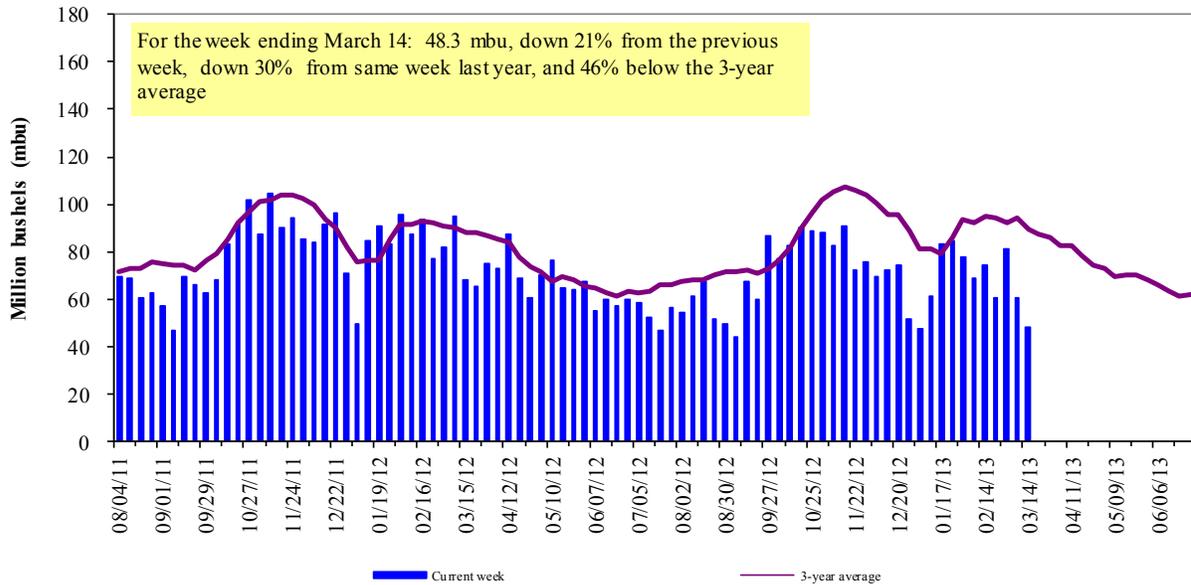
²Total includes only port regions shown above; Interior land-based shipments now included.

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)

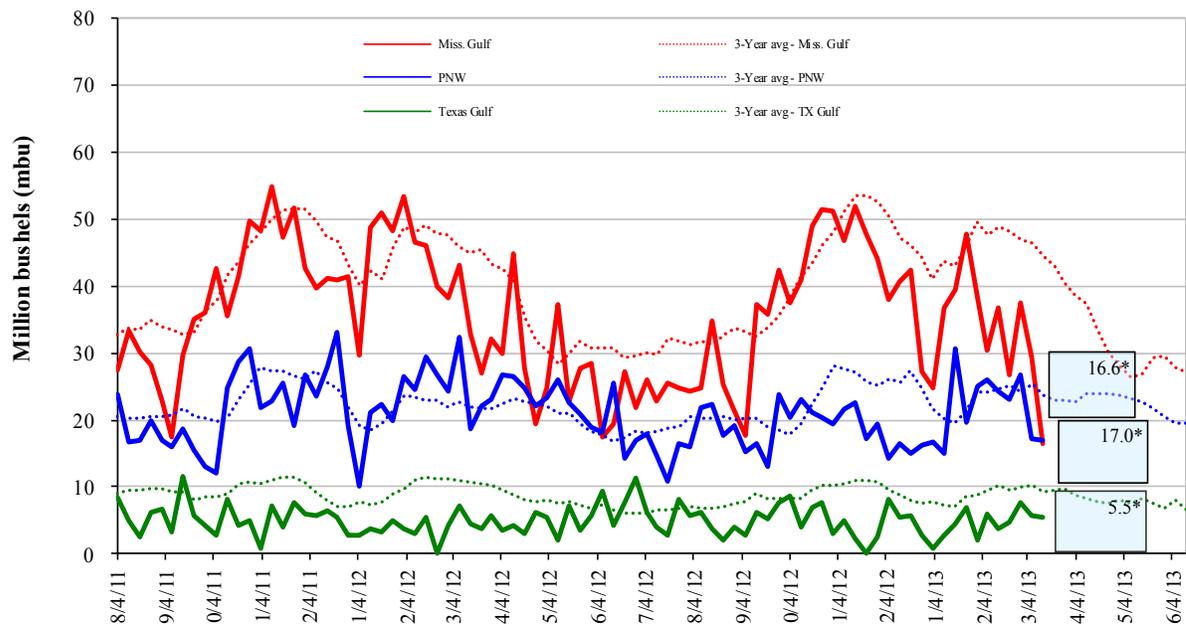


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

March 14 % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 44	down 5	down 37	down 1
Last year (same week)	down 50	up 25	down 41	down 8
3-yr avg (4-wk mov. avg)	down 63	down 41	down 59	down 18

Ocean Transportation

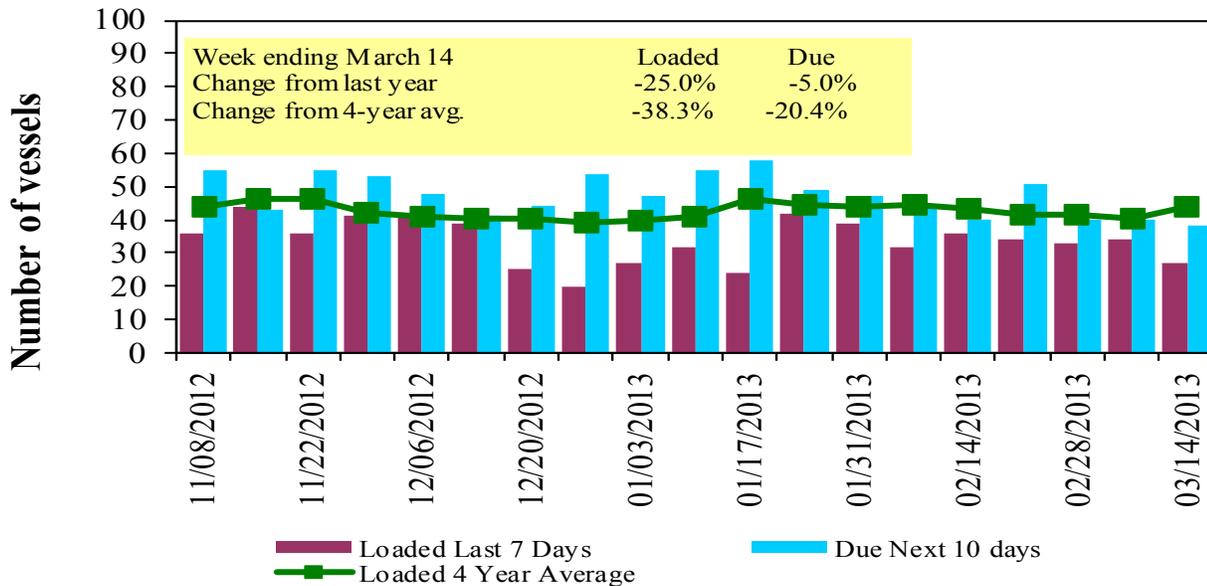
Table 17

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
3/14/2013	27	27	38	13	n/a
3/7/2013	22	34	40	12	n/a
2012 range	(13..50)	(13..46)	(27..78)	(4..20)	n/a
2012 avg.	28	33	46	11	n/a

Source: Transportation & Marketing Programs/AMS/USDA

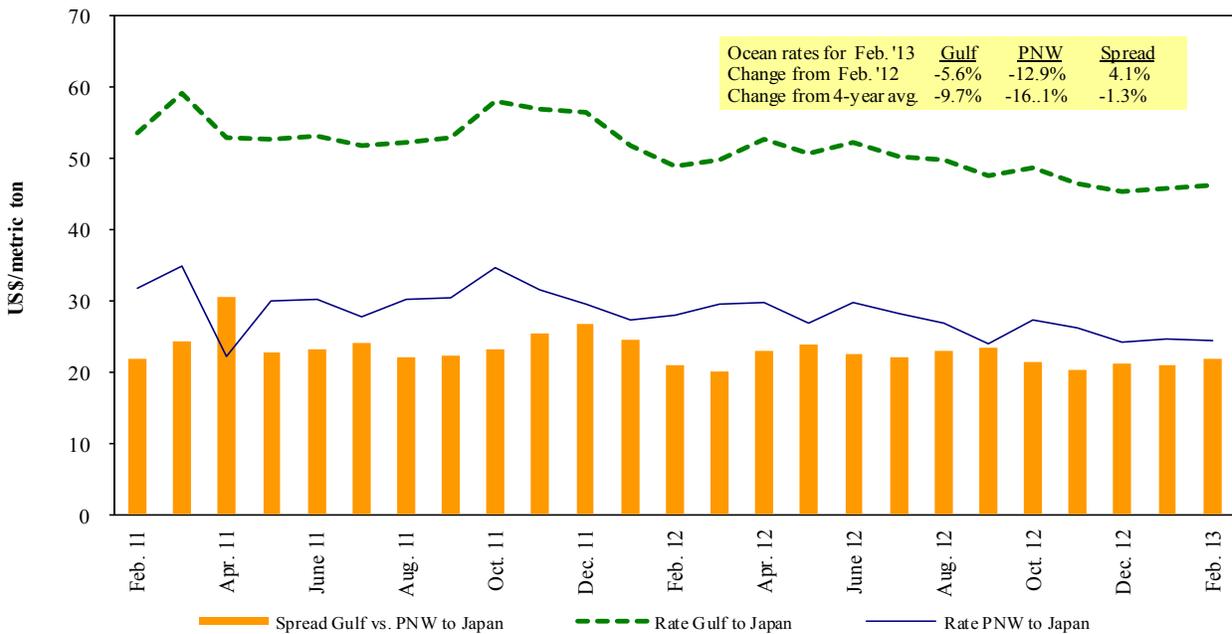
Figure 16
U.S. Gulf^d Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18
Ocean Freight Rates For Selected Shipments, Week Ending 03/16/2013

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 25/Fe 5	55,000	43.05
U.S. Gulf	China	Heavy Grain	Jan 25/Fe5	55,000	43.05
U.S. Gulf	Egypt Med	Heavy Grain	Feb 20/Mar 5	60,000	23.25
U.S. Gulf	China	Heavy Grain	Feb 1/5	54,000	20.50
U.S. Gulf	Ethiopia ¹	Wheat	Mar 11/21	21,000	44.62
PNW	China	Heavy Grain	Feb 1/5	54,000	20.50
Australia	Italy	Heavy Grain	Feb 10/25	58,000	27.00
Brazil	China	Heavy Grain	March 5/25	60,000	40.25
Brazil	China	Heavy Grain	Mar 1/10	60,000	38.25
Brazil	China	Heavy Grain	Mar 3/12	60,000	35.00
Brazi	China	Heavy Grain	May 1/5	60,000	35.35
Brazil	China	Heavy Grain	Feb 19/22	60,000	34.50
Brazil	China	Heavy Grain	Feb 10/19	60,000	35.50
Brazil	China	Heavy Grain	Feb 8/23	60,000	35.50
France	Algeria	Wheat	Mar 20/30	30,000	19.75
France	Algeria	Wheat	Feb 20/25	30,000	18.50
River Plate	Egypt Med	Heavy Grain	Apr 8/12	60,000	32.00

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

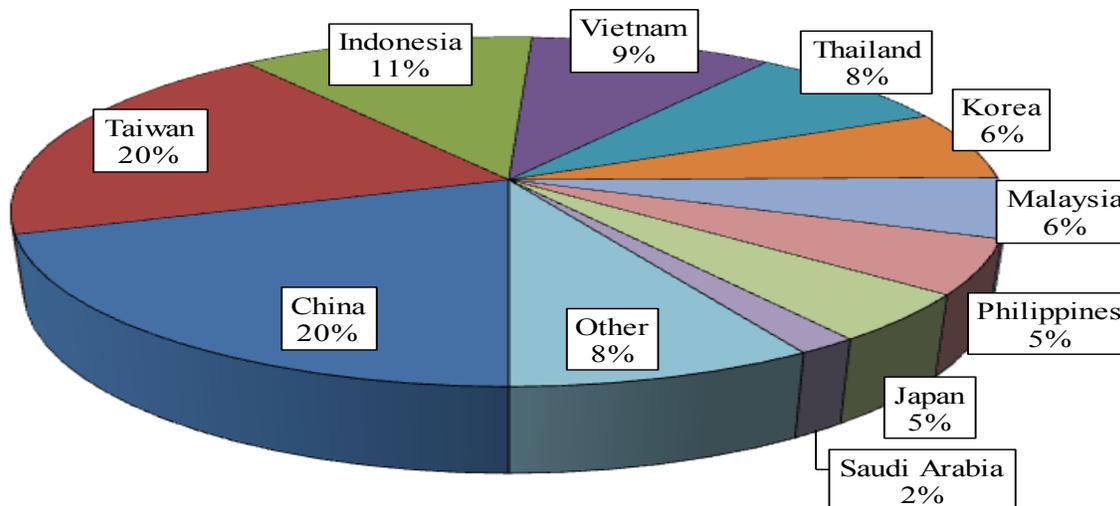
¹50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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, December 2012

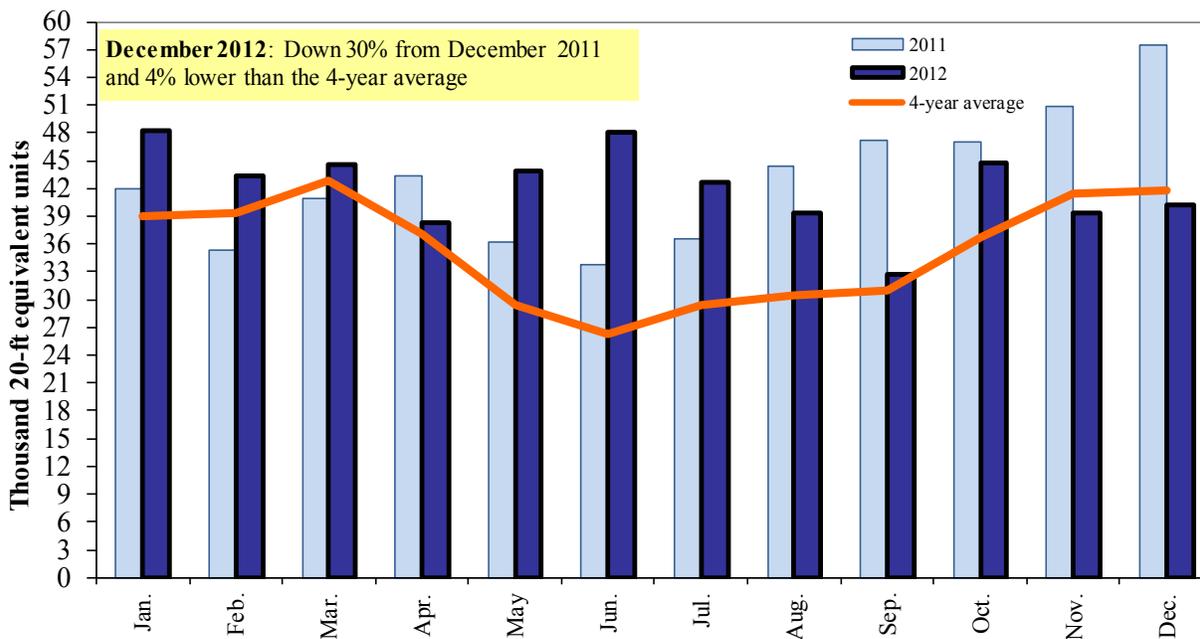


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report*.
March 21, 2013. Web: <http://dx.doi.org/10.9752/TS056.03-21-2013>

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