United States Department of Agriculture

Grain Transportation Report

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

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Contents

The next release is April 3, 2014

WEEKLY HIGHLIGHTS

Busy Year So Far for U.S. Grain Export Loading Activity

Ocean-going grain vessel loading activity has been strong in the U.S. Gulf and Pacific Northwest (PNW) since the beginning of the year. During the weekly periods ending January 1 to March 20, an average of 74 vessels was in the Gulf ports loading or waiting to be loaded, 151 percent more than the same period last year. An average of 44 vessels was loaded in the previous 7 days, 37 percent more than last year. Seventy-six vessels are expected to be loaded in the next 10 days, 65 percent more than last year. At the PNW ports, an average of 20 vessels was loading or waiting to be loaded, 38 percent more than the same period last year. Given the continued moderate ocean freight rates, uncertainty surrounding China and Brazilian soybean trade talks, and unrest in Ukraine, U.S. export activity may continue to be strong.

Wheat and Corn Inspections Continue to Increase

For the week ending March 20, **total inspections of grain** (corn, wheat, and soybeans) for export from all major port regions reached 2.4 million metric tons (mmt), down 2 percent from the previous week, up 60 percent from last year, and 15 percent above the 3-year average. Wheat (.553 mmt) and corn (1.1 mmt) inspections were up for the second consecutive week, increasing 7 and 15 percent from the past week. Shipments of wheat increased, primarily to Asia, and corn exports increased to Latin America and Asia. Tight U.S. stocks and Brazilian competition have caused soybean inspections (.761 mmt) to continue decreasing. Currently, inspections of soybeans are down 22 percent from the previous week. Outstanding export sales were also lower for soybeans than the past week, but remained steady for corn and wheat.

Railcar Shortages Push Up Ethanol/Gasoline Prices

According to the Renewable Fuels Association, railcar shortages due to the cold winter and heavy demand for railcar service moving crude oil in the Upper Midwest have resulted in ethanol prices rising sharply—up 80 cents per gallon in the last month. Producers have had to pay as much as $3,000 to reserve a railcar, with some ethanol plants having to wait 35 to 40 days for a railcar. Meanwhile, the Energy Information Administration reported ethanol inventories declined for 5 weeks before improving slightly in the week ending March 21. During the week ending March 21, ethanol prices topped $3.00 per gallon. As a result of higher prices for ethanol, which is blended into gasoline, the price of gasoline has also increased, according to industry analyst Trilby Lundberg. U.S. gas prices have increased 26 cents per gallon over the last six weeks.

Snapshots by Sector

Rail

U.S. railroads originated 21,045 **carloads of grain** during the week ending March 15, up 12 percent from last week, 21 percent from last year, and 3 percent from than the 3-year average.

During the week ending March 20, average April non-shuttle **secondary railcar bids/offers per car** were $1,875 above tariff, up $125 from last week and $1,875 higher than last year. Average shuttle secondary railcar bids/offers per car were $2,158.50 above tariff, down $91.50 from last week and $2,279.50 higher than last year.

Barge

During the week ending March 22, **barge grain movements** totaled 646,750 tons, 14.6 percent lower than the previous week but 74.3 percent higher than the same period last year.

During the week ending March 22, 389 grain barges **moved down river**, down 18.8 percent from last week; 757 grain barges were **unloaded in New Orleans**, up 4.3 percent from the previous week.

Ocean

During the week ending March 20, 45 **ocean-going grain vessels** were loaded in the Gulf, 36 percent more than the same period last year. Fifty-three vessels are expected to be loaded within the next 10 days, 26 percent more than the same period last year.

During the week ending March 21, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $53 per mt, unchanged from the previous week. The cost of shipping from the Pacific Northwest to Japan was $29 per mt, down 3 percent from the previous week.

Fuel

During the week ending March 24, U.S. average **diesel fuel prices** decreased 2 cents from the previous week to $3.99 per gallon, down 2 cents from with the same week last year.

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Feature Article/Calendar

Despite Increased Transportation Cost, China Imported More Soybeans During Fourth Quarter

Despite the increases in transportation costs, China imported more soybeans from the United States during the fourth quarter of 2013 than during the same period a year earlier. China imported 17 million metric tons (mmt) of soybeans at a value of $8.91 billion during the fourth quarter—32 and 13 percent, respectively, more than the same period a year ago. Meanwhile, the transportation cost of shipping soybeans from the United States to Europe and China increased from the previous quarter and also from a year earlier.

The cost of transporting soybeans from Minneapolis, MN, and Davenport, IA, to Hamburg, Germany, through the U.S. Gulf increased by 15 and 20 percent, respectively, from the previous quarter and 8 and 14 percent year to year (table 1). The cost of shipping from the same locations to Shanghai, China, increased by 20 and 24 percent compared to the previous quarter, and 9 and 14 percent compared to the same period last year (table 2). Shipping soybeans from Fargo, ND, and Sioux Falls, SD, to Shanghai through the Pacific Northwest ports cost 5 percent more, respectively, than the previous quarter, and 9 and 8 percent more than a year earlier. The cost of shipping from South Goiás (GO) to both Hamburg and Shanghai increased by 16 and 22 percent over the previous quarter, and 36 and 24 percent over the previous year. However, the cost of shipping from North Mato Grosso (MT) to Hamburg and Shanghai decreased by 7 and 2 percent during the quarter.

Table 1-Quarterly costs of transporting soybeans from U.S. and Brazil to Hamburg, Germany

	2012 4th qtr.	2013 3rd qtr.	2013 4th qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2012 4th qtr.	2013 3rd qtr.	2013 4th qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.
	United States (via U.S. Gulf)									
	Minneapolis, MN --$/mt--					**Davenport, IA** --$/mt--				
Truck	10.86	13.38	12.42	14.36	-7.17	10.86	13.38	12.42	14.36	-7.17
Barge	41.08	27.93	37.73	-8.15	35.09	33.95	21.94	33.90	-0.15	54.51
Ocean[1]	18.68	24.85	26.07	39.56	4.91	18.68	24.85	26.07	39.56	4.91
Total transportation[2]	70.62	66.16	76.22	7.93	15.21	63.49	60.17	72.39	14.02	20.31
Farm Value[3]	518.09	521.76	460.52	-11.11	-11.74	522.99	529.10	466.64	-10.77	-11.80
Landed Cost	588.71	587.92	536.74	-8.83	-8.71	586.48	589.27	539.03	-8.09	-8.53
Transport % of landed cost	12.00	11.25	14.20			10.83	10.21	13.43		
	Brazil									
	North MT[4] - Santos[5] --$/mt--					**South GO[4] - Paranagua[5]** --$/mt--				
Truck	109.80	119.90	109.29	-0.46	-8.85	53.11	73.09	88.86	67.31	21.58
Ocean[6]	28.00	29.00	30.00	7.14	3.45	34.30	29.00	30.00	-12.54	3.45
Total transportation[2]	137.80	148.90	139.29	1.08	-6.45	87.41	102.09	118.86	35.98	16.43
Farm Value[7]	536.60	404.93	445.27	-17.02	9.96	557.54	405.90	441.17	-20.87	8.69
Landed Cost	674.40	553.83	584.56	-13.32	5.55	644.95	507.99	560.03	-13.17	10.24
Transport % of landed cost	20.43	26.89	23.83			13.55	20.10	21.22		

[1]Source: O'Neil Commodity Consulting

[3]Source: USDA/NASS

[4]Producing regions: MT= Mato Grosso, GO = Goiás

[5]Export ports

[6]Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS

[7]Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br

Note: Total may not add exactly due to rounding

The quarter-to-quarter increases in U.S. transportation costs were due to increased barge, ocean, and rail tariff rates. The year-to-year increases were caused by increased truck, ocean, and rail tariff rates. The barge rates increased during the quarter due to a seasonal increase in the demand for barge service during the harvest period. Likewise, ocean rates increased during the quarter as global shipments of bulk commodities increased, and there were strong grain exports out of the U.S. Gulf ports. Both truck and ocean rates increased in South GO during the quarter. However, the truck rate from North MT decreased during the quarter, pushing down the transportation cost.

Farm prices declined in the United States from quarter to quarter and year to year. Year-to-year farm prices decreased in Brazil, but increased from quarter to quarter. The transportation share of the landed costs increased in the United States, but was mixed in Brazil. The transportation share of the landed costs ranged from 13 to 19 percent in the United States and 21 to 25 percent in Brazil.

Table 2-Quarterly costs of transporting soybeans from U.S. and Brazil to Shanghai, China

	2012 4th qtr.	2013 3rd qtr.	2013 4th qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2012 4th qtr.	2013 3rd qtr.	2013 4th qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.
	United States (via U.S. Gulf)									
	Minneapolis, MN					**Davenport, IA**				
	--$/mt--					--$/mt--				
Truck	10.86	13.38	12.42	14.36	-7.17	10.86	13.38	12.42	14.36	-7.17
Barge	41.08	27.93	37.73	-8.15	35.09	33.95	21.94	33.90	-0.15	54.51
Ocean[1]	43.69	45.71	54.13	23.90	18.42	43.69	45.71	54.13	23.90	18.42
Total transportation[2]	95.63	87.02	104.28	9.05	19.83	88.50	81.03	100.45	13.50	23.97
Farm Value[3]	518.09	521.76	460.52	-11.11	-11.74	522.99	529.11	466.64	-10.77	-11.81
Landed Cost	613.72	608.78	564.80	-7.97	-7.22	611.49	610.14	567.09	-7.26	-7.06
Transport % of landed cost	15.58	14.29	18.46			14.47	13.28	17.71		
	Via PNW									
	Fargo, ND					**Sioux Falls, SD**				
Truck	10.86	13.38	12.42	14.36	-7.17	10.86	13.38	12.42	14.36	-7.17
Ocean[1]	23.58	25.15	28.62	21.37	13.80	23.58	25.15	28.62	21.37	13.80
Rail	57.87	57.12	59.31	2.49	3.83	59.64	58.67	60.88	2.08	3.77
Total transportation[2]	92.31	95.65	100.35	8.71	4.91	94.08	97.20	101.92	8.33	4.86
Farm Value[3]	515.64	491.14	456.62	-11.45	-7.03	516.86	508.29	456.62	-11.65	-10.17
Landed Cost	607.95	586.79	556.97	-8.39	-5.08	610.94	605.49	558.54	-8.58	-7.75
Transport % of landed cost	15.18	16.30	18.02			15.40	16.05	18.25		
	Brazil									
	North MT[4] - Santos[5]					**South GO[4] - Paranagua[5]**				
	--$/mt--					--$/mt--				
Truck	109.80	119.90	109.29	-0.46	-8.85	53.11	73.09	88.86	67.31	21.58
Ocean[6]	50.42	34.50	42.50	-15.71	23.19	55.42	36.75	46.00	-17.00	25.17
Total transportation[2]	160.22	154.40	151.79	-5.26	-1.69	108.53	109.84	134.86	24.26	22.78
Farm Value [7]	536.60	404.93	445.27	-17.02	9.96	557.54	405.90	441.17	-20.87	8.69
Landed Cost	696.82	559.33	597.06	-14.32	6.75	666.07	515.74	576.03	-13.52	11.69
Transport % of landed cost	22.99	27.60	25.42			16.29	21.30	23.41		

[1]Source: O'Neil Commodity Consulting
[3]Source: USDA/NASS
[4]Producing regions: MT= Mato Grosso, GO = Goiás
[5]Export ports
[6]Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS
[7]Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br
Note: Total may not add exactly due to rounding

Market Outlook: Although China imported slightly (7 percent) less soybeans from the United States during January to December 2013, China imported significantly more during the fourth quarter—33 percent more than the same period a year ago. This was aided in part by a larger soybean crop in the United States and declining soybean prices, which spurred increasing demand in China. China's soybean production for the marketing year (MY) 2013/14 is estimated at 11.8 million tons (mt) due to less planted area and to yield factors (USDA, FAS *GAIN Report #: CH13052*). In some producing areas, farmers opted to plant more profitable alternative crops such as corn, rice, sorghum, and potatoes. Due to increasing demand for soybeans by animal husbandry and feed industries, and falling soybean stocks, China is forecast to import more than 67.7 mt of soybeans during MY 2013/14—up from 60 mt in MY 12/13. On the contrary, fewer soybeans were exported to Europe during the fourth quarter, but 7 percent more soybeans were exported during the entire year compared to the previous year. For more on Brazil Soybean Transportation, see *Brazil Transportation Indicator Report*. surajudeen.olowolayemo@ams.usda.gov

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
Week ending		Unit Train	Shuttle		Gulf	Pacific
03/26/14	268	342	306	261	237	206
03/19/14	269	321	378	321	237	213

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

Source: Transportation & Marketing Programs/AMS/USDA

*No quote for Illinois River as ice accumulation severely limited barge operations.

Table 2

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

Commodity	Origin--Destination	3/21/2014	3/14/2014
Corn	IL--Gulf	-0.95	-1.11
Corn	NE--Gulf	-1.10	-1.29
Soybean	IA--Gulf	-1.38	-1.33
HRW	KS--Gulf	-1.95	-1.65
HRS	ND--Portland	-3.11	-3.18

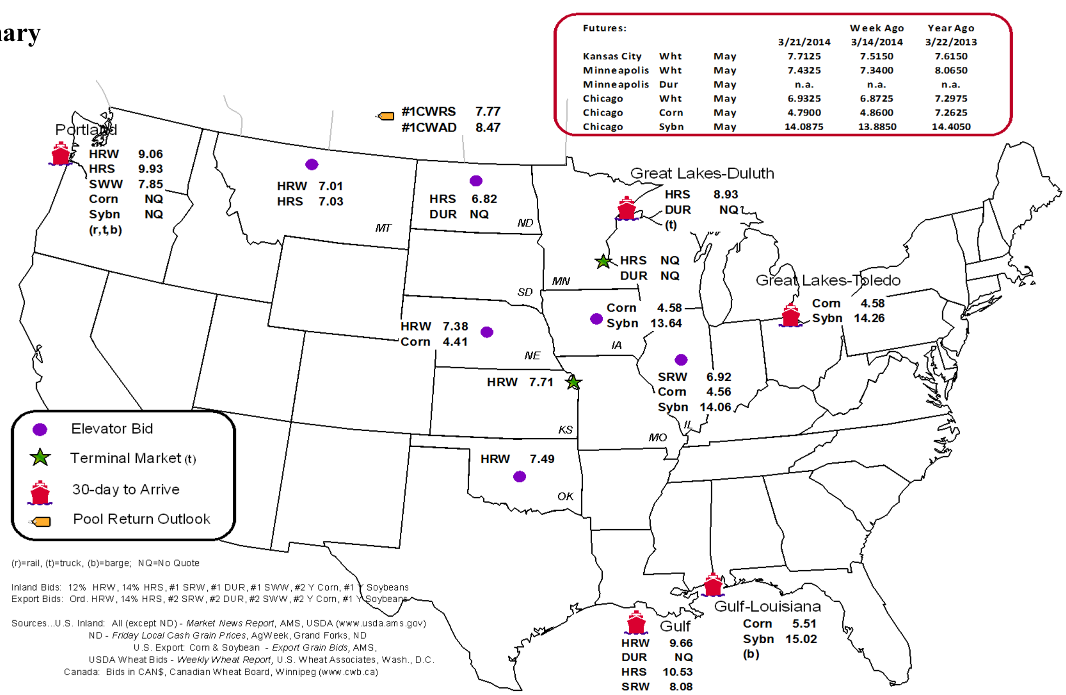
Note: nq = no quote

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 Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-Border Mexico[3]
3/19/2014[p]	760	1,326	4,543	845	7,474	03/15/14	2,088
3/12/2014[r]	928	1,754	5,174	711	8,567	3/8/2014	1,589
2014 YTD[r]	14,191	18,631	62,335	10,274	105,431	2014 YTD	18,438
2013 YTD[r]	7,581	10,112	50,125	7,716	75,534	2013 YTD	12,082
2014 YTD as % of 2013 YTD	187	184	124	133	140	% change YTD	153
Last 4 weeks as % of 2013[2]	1,138	150	125	245	156	Last 4wks % 2013	154
Last 4 weeks as % of 4-year avg.[2]	203	107	119	138	125	Last 4wks % 4 yr	99
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 aproximately 15 percent below the Association of American Railroads reported weekly carloads received by Mexican railroads to reflect switching between KCSM and FerroMex.

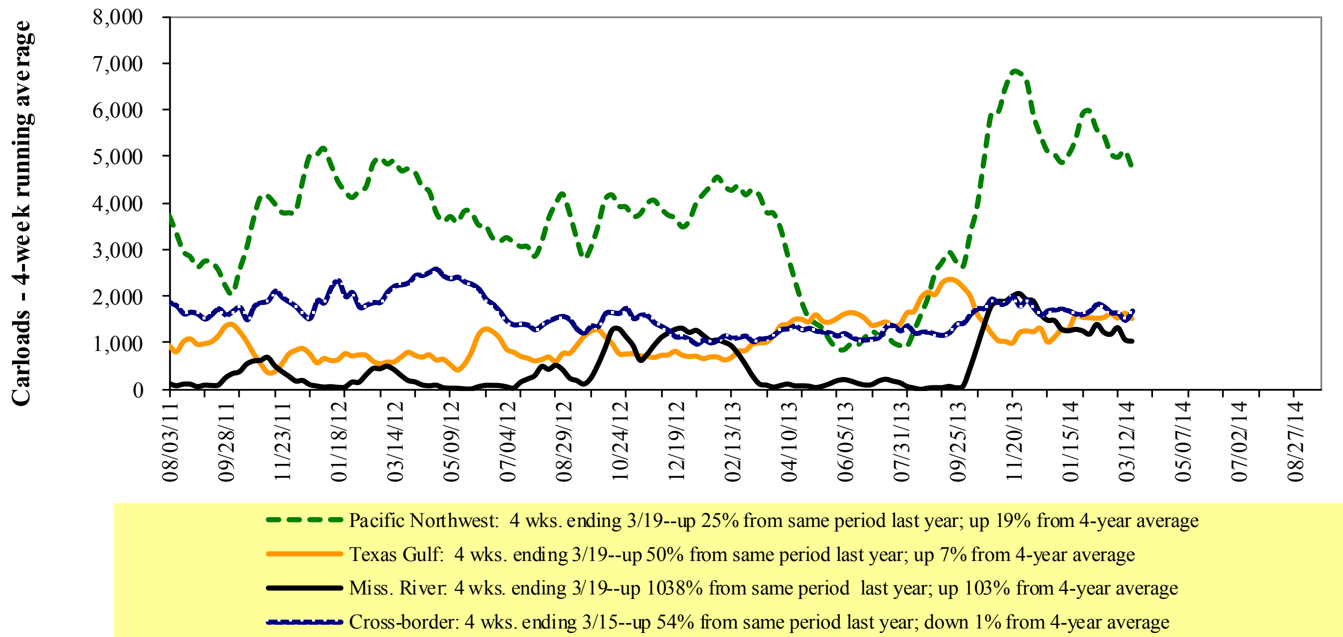
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 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)

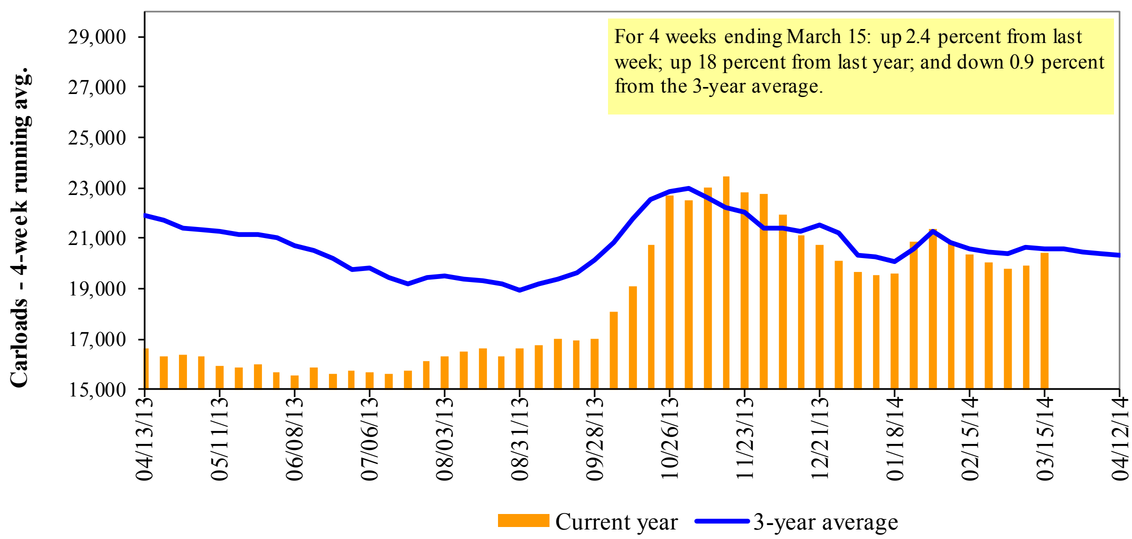
	East		West			U.S. total	Canada	
Week ending	CSXT	NS	BNSF	KCS	UP		CN	CP
03/15/14	2,346	3,272	8,434	800	6,193	21,045	3,864	4,275
This week last year	1,239	2,381	9,264	531	3,964	17,379	3,025	4,899
2014 YTD	22,184	33,078	93,175	10,764	64,012	223,213	41,608	50,226
2013 YTD	17,093	28,510	104,578	5,433	41,871	197,485	38,545	57,862
2014 YTD as % of 2013 YTD	130	116	89	198	153	113	108	87
Last 4 weeks as % of 2013	136	132	93	202	153	118	126	89
Last 4 weeks as % of 3-yr avg.[1]	106	114	82	189	115	99	105	90
Total 2013	86,466	137,915	454,262	34,412	222,258	935,313	190,125	272,753

[1]As 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 Offerings[1] ($/car)[2]

Week ending	Delivery period							
3/20/2014	Apr-14	Apr-13	May-14	May-13	Jun-14	Jun-13	Jul-14	Jul-13
BNSF[3]								
COT grain units	no offer	1	no offer	no bids	no offer	no bids	no offer	no bids
COT grain single-car[5]	no offer	0 . . 5	no offer	0 . . 10	no offer	no bids	no offer	0
UP[4]								
GCAS/Region 1	no offer	no bids	no offer	no bids	no offer	no bids	n/a	n/a
GCAS/Region 2	no offer	no bids	no offer	no bids	no offer	no bids	n/a	n/a

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

[2]Average premium/discount to tariff, last auction

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

[4]UP - GCAS = Grain Car Allocation System

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

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

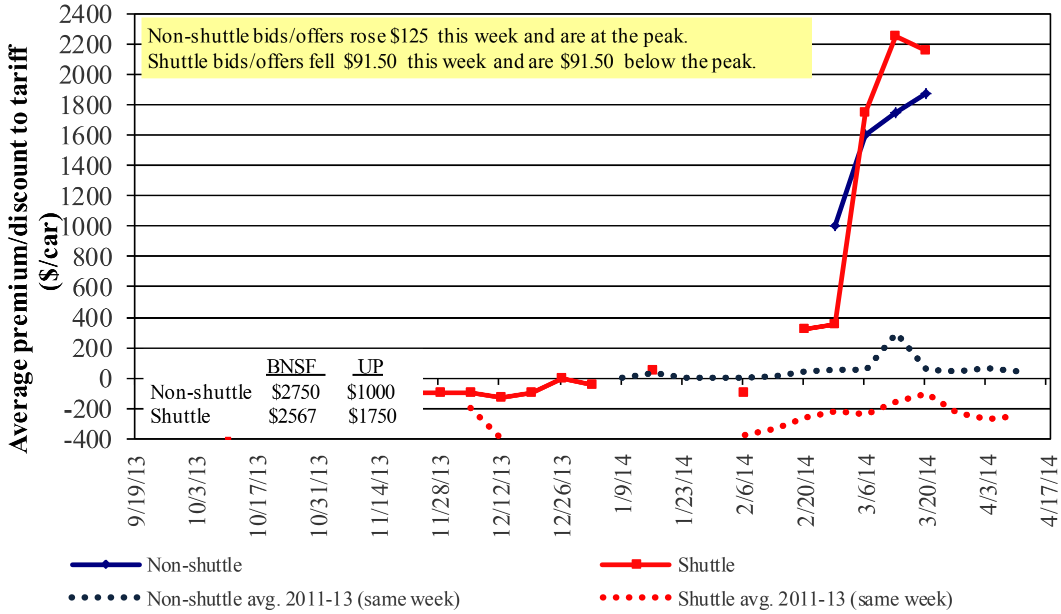
[5]Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

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

Figure 4

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

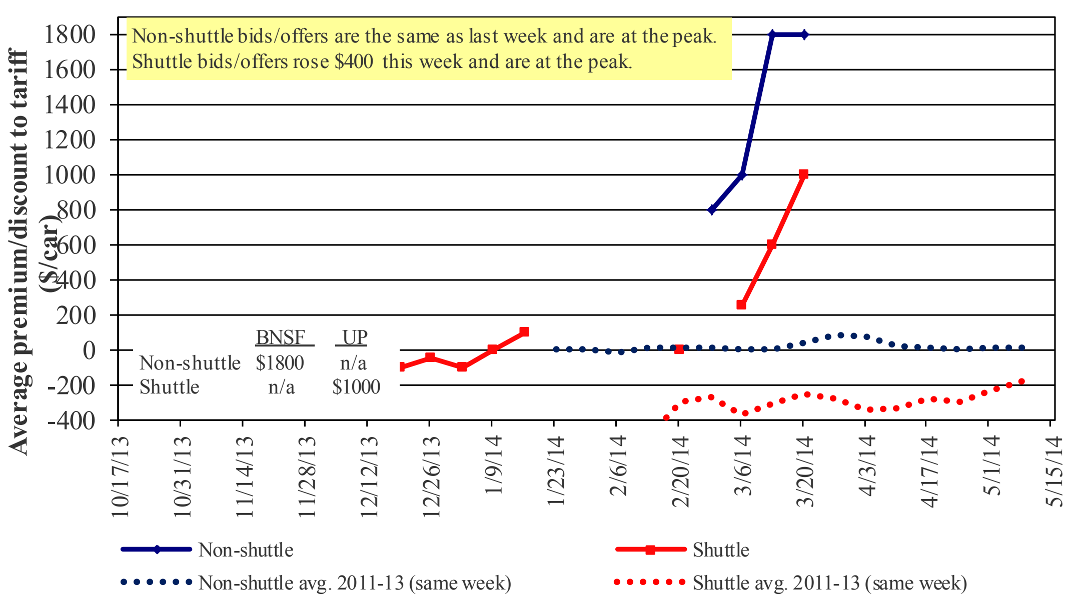


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

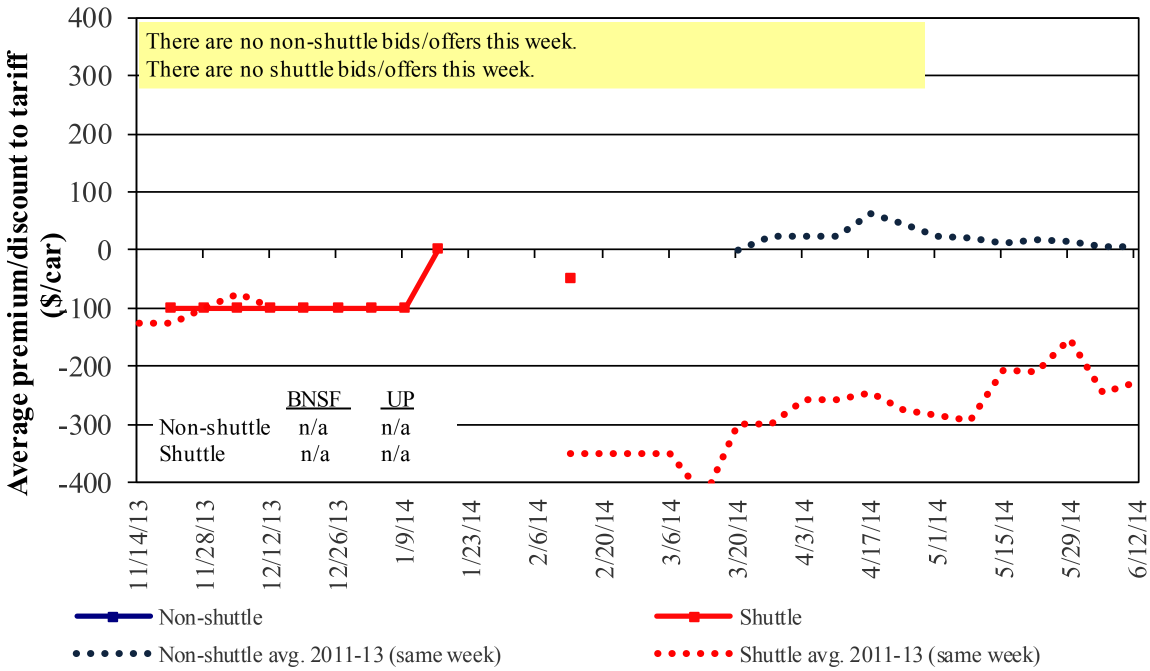


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in June 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					
3/20/2014	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14
Non-shuttle						
BNSF-GF	2,750	1,800	n/a	n/a	n/a	n/a
Change from last week	250	-	n/a	n/a	n/a	n/a
Change from same week 2013	2,750	1,800	n/a	n/a	n/a	n/a
UP-Pool	1,000	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
Shuttle[2]						
BNSF-GF	2,567	n/a	n/a	n/a	n/a	1,500
Change from last week	(933)	n/a	n/a	n/a	n/a	n/a
Change from same week 2013	2,659	n/a	n/a	n/a	n/a	n/a
UP-Pool	1,750	1,000	n/a	n/a	n/a	n/a
Change from last week	750	400	n/a	n/a	n/a	n/a
Change from same week 2013	1,900	1,158	n/a	n/a	n/a	n/a

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

Data from James B. Joiner Co., Tradewest Brokerage Co.

Table 7

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

Effective date: 3/1/2014	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[3]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$3,191	$182	$33.50	$0.91	1
	Grand Forks, ND	Duluth-Superior, MN	$3,596	$104	$36.75	$1.00	1
	Wichita, KS	Los Angeles, CA	$6,244	$536	$67.32	$1.83	3
	Wichita, KS	New Orleans, LA	$3,808	$320	$41.00	$1.12	4
	Sioux Falls, SD	Galveston-Houston, TX	$5,824	$440	$62.20	$1.69	4
	Northwest KS	Galveston-Houston, TX	$4,076	$351	$43.96	$1.20	4
	Amarillo, TX	Los Angeles, CA	$4,275	$489	$47.30	$1.29	3
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,192	$362	$35.29	$0.90	2
	Toledo, OH	Raleigh, NC	$4,686	$416	$50.66	$1.29	4
	Des Moines, IA	Davenport, IA	$2,078	$77	$21.40	$0.54	3
	Indianapolis, IN	Atlanta, GA	$4,061	$312	$43.43	$1.10	3
	Indianapolis, IN	Knoxville, TN	$3,469	$200	$36.44	$0.93	3
	Des Moines, IA	Little Rock, AR	$3,218	$225	$34.19	$0.87	2
	Des Moines, IA	Los Angeles, CA	$5,215	$656	$58.30	$1.48	2
Soybeans	Minneapolis, MN	New Orleans, LA	$3,529	$402	$39.04	$1.06	-1
	Toledo, OH	Huntsville, AL	$3,687	$295	$39.55	$1.08	3
	Indianapolis, IN	Raleigh, NC	$4,756	$419	$51.39	$1.40	4
	Indianapolis, IN	Huntsville, AL	$3,379	$200	$35.54	$0.97	3
	Champaign-Urbana, IL	New Orleans, LA	$3,748	$362	$40.82	$1.11	3
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,678	$308	$39.58	$1.08	2
	Wichita, KS	Galveston-Houston, TX	$3,798	$240	$40.10	$1.09	4
	Chicago, IL	Albany, NY	$3,950	$390	$43.10	$1.17	4
	Grand Forks, ND	Portland, OR	$5,159	$532	$56.51	$1.54	1
	Grand Forks, ND	Galveston-Houston, TX	$6,084	$554	$65.92	$1.79	0
	Northwest KS	Portland, OR	$5,043	$576	$55.80	$1.52	3
Corn	Minneapolis, MN	Portland, OR	$5,000	$648	$56.09	$1.42	3
	Sioux Falls, SD	Tacoma, WA	$4,960	$593	$55.15	$1.40	3
	Champaign-Urbana, IL	New Orleans, LA	$3,011	$362	$33.50	$0.85	2
	Lincoln, NE	Galveston-Houston, TX	$3,510	$346	$38.29	$0.97	5
	Des Moines, IA	Amarillo, TX	$3,590	$283	$38.46	$0.98	2
	Minneapolis, MN	Tacoma, WA	$5,000	$643	$56.03	$1.42	3
	Council Bluffs, IA	Stockton, CA	$4,400	$665	$50.29	$1.28	4
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,520	$593	$60.71	$1.65	3
	Minneapolis, MN	Portland, OR	$5,530	$648	$61.35	$1.67	3
	Fargo, ND	Tacoma, WA	$5,430	$527	$59.16	$1.61	3
	Council Bluffs, IA	New Orleans, LA	$4,175	$418	$45.61	$1.24	5
	Toledo, OH	Huntsville, AL	$2,862	$295	$31.35	$0.85	4
	Grand Island, NE	Portland, OR	$5,110	$589	$56.60	$1.54	-2

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

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

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

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

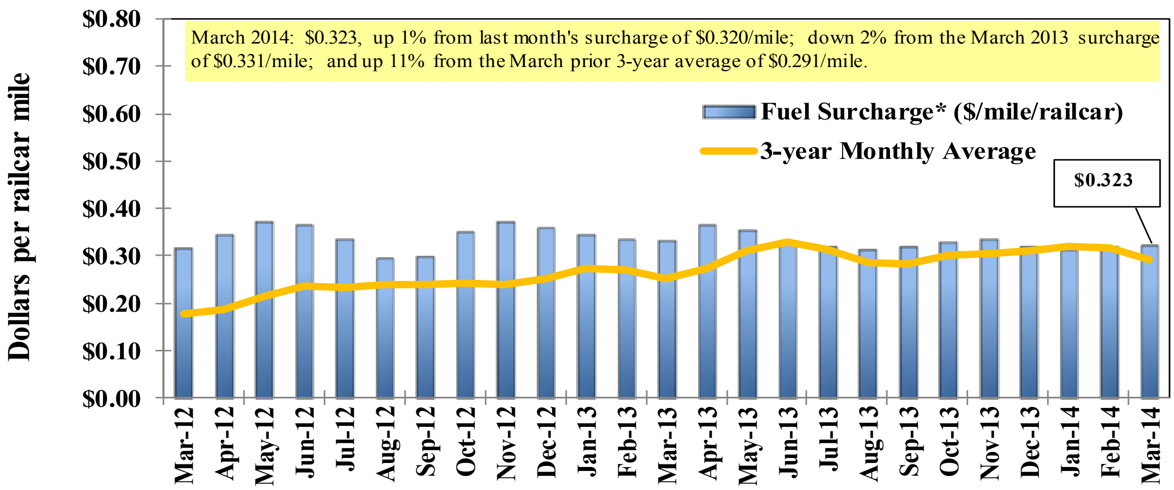
*Regional economic areas defined by the Bureau of Economic Analysis (BEA)

Table 8
Tariff Rail Rates for U.S. Bulk Grain Shipments to Mexico

Effective date: 3/1/2014				Fuel			Percent
	Origin		Tariff	surcharge	Tariff plus surcharge per:		change
Commodity	state	Destination region	rate/car[1]	per car[2]	metric ton[3]	bushel[3]	Y/Y[4]
Wheat	MT	Chihuahua, CI	$6,360	$563	$70.73	$1.92	1
	OK	Cuautitlan, EM	$6,156	$684	$69.88	$1.90	-6
	KS	Guadalajara, JA	$6,559	$660	$73.77	$2.01	-11
	TX	Salinas Victoria, NL	$2,898	$258	$32.24	$0.88	-17
Corn	IA	Guadalajara, JA	$7,974	$777	$89.41	$2.27	3
	SD	Celaya, GJ	$7,656	$736	$85.75	$2.18	-5
	NE	Queretaro, QA	$7,317	$690	$81.81	$2.08	2
	SD	Salinas Victoria, NL	$5,880	$560	$65.80	$1.67	3
	MO	Tlalnepantla, EM	$6,755	$670	$75.87	$1.93	2
	SD	Torreon, CU	$6,722	$617	$74.98	$1.90	3
Soybeans	MO	Bojay (Tula), HG	$7,868	$655	$87.08	$2.37	3
	NE	Guadalajara, JA	$8,447	$749	$93.96	$2.55	3
	IA	El Castillo, JA	$8,855	$732	$97.95	$2.66	3
	KS	Torreon, CU	$6,864	$465	$74.88	$2.04	3
Sorghum	TX	Guadalajara, JA	$6,953	$479	$75.94	$1.93	7
	NE	Celaya, GJ	$7,212	$669	$80.51	$2.04	3
	KS	Queretaro, QA	$6,650	$420	$72.24	$1.83	-2
	NE	Salinas Victoria, NL	$5,368	$492	$59.87	$1.52	-1
	NE	Torreon, CU	$6,243	$549	$69.40	$1.76	1

[1]Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75--110 cars that meet railroad efficiency requirements.
[2]Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu
[4]Percentage change year over year calculated using tariff rate plus fuel surchage
Sources: www.bnsf.com, www.uprr.com, www.kcsouthern.com

Figure 7
Railroad Fuel Surcharges, North American Weighted Average[1]



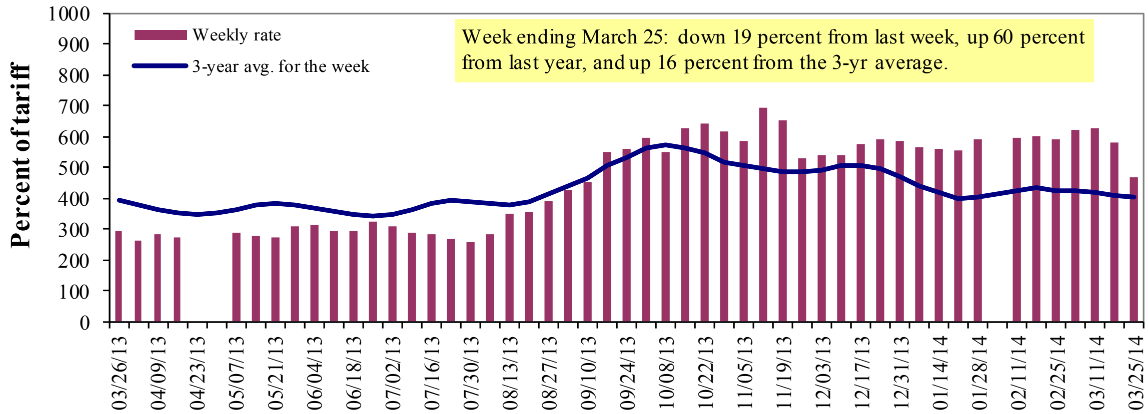
[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.
* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.
** BNSF strike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

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate[1,2]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	3/25/2014	--	468	469	350	381	381	281
	3/18/2014	--	--	578	463	483	483	377
$/ton	3/25/2014	--	--	21.76	13.97	17.87	15.39	8.82
	3/18/2014	--	--	26.82	18.47	22.65	19.51	11.84
Current week % change from the same week:								
	Last year	--	57	60	43	86	86	59
	3-year avg. [2]	--	16	16	12	15	15	6
Rate[1]	April	519	453	438	339	369	369	281
	June	471	413	405	325	363	363	278

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds; No rates reported on Illinois River due to ice.

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

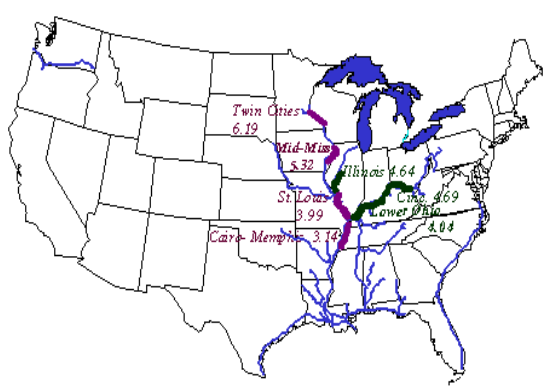
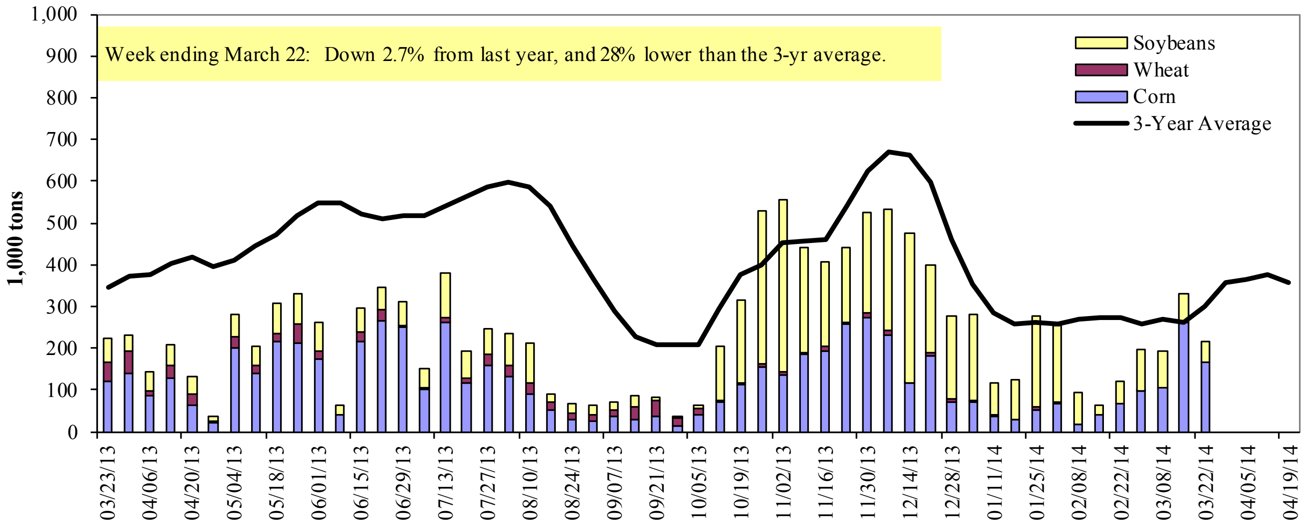


Figure 10

Barge Movements on the Mississippi River[1] (Locks 27 - Granite City, IL)



[1] The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

Week ending 3/22/2014	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	5	0	0	0	5
Alton, IL (L26)	158	0	46	0	205
Granite City, IL (L27)	166	0	51	0	217
Illinois River (L8)	147	0	19	0	166
Ohio River (L52)	299	28	48	0	375
Arkansas River (L1)	15	29	10	0	55
Weekly total - 2014	481	58	108	0	647
Weekly total - 2013	146	114	106	5	371
2014 YTD[1]	3,503	312	3,286	40	7,142
2013 YTD	1,366	1,050	2,852	56	5,324
2014 as % of 2013 YTD	257	30	115	72	134
Last 4 weeks as % of 2013[2]	254	34	132	59	150
Total 2013	9,504	4,111	10,065	255	23,935

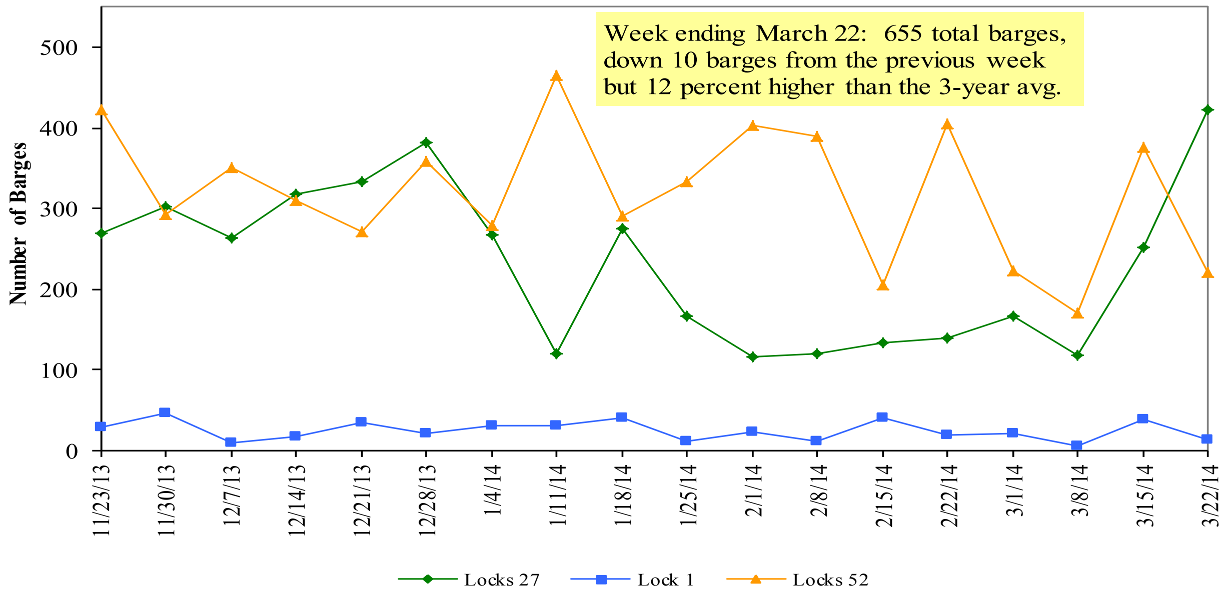
[1] Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

[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

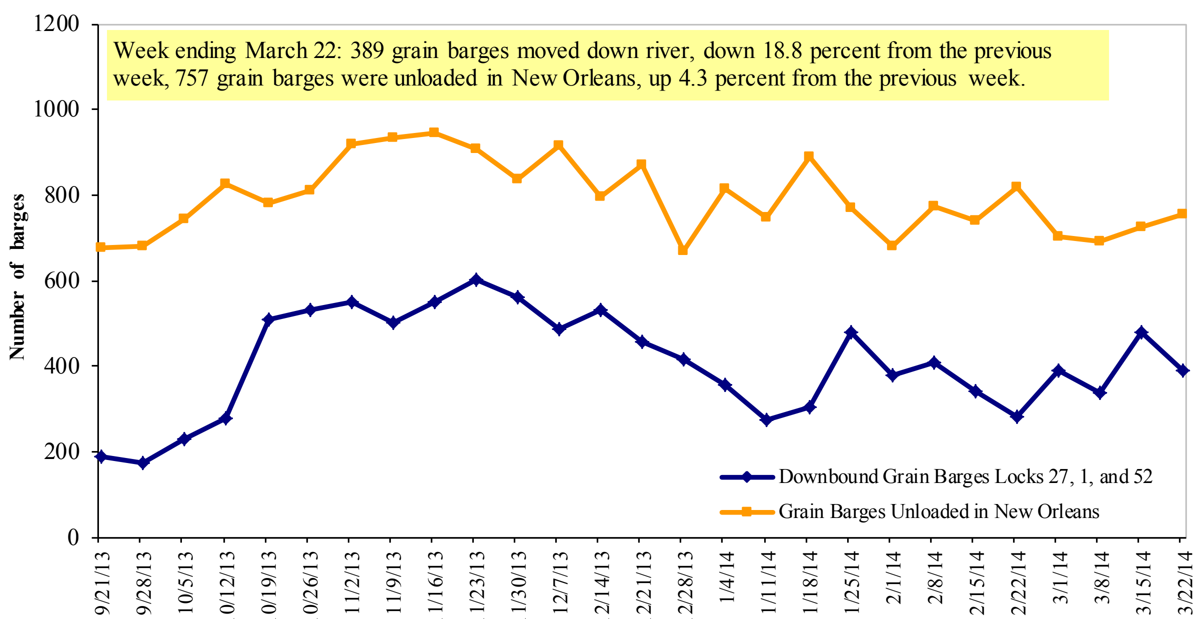
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 Prices[1], Week Ending 3/24/2013 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	4.115	-0.023	0.065
	New England	4.279	-0.034	0.108
	Central Atlantic	4.277	-0.037	0.168
	Lower Atlantic	3.963	-0.010	-0.020
II	Midwest[2]	3.975	-0.019	-0.004
III	Gulf Coast[3]	3.800	-0.003	-0.135
IV	Rocky Mountain	3.984	-0.007	0.049
V	West Coast	4.009	-0.011	-0.092
	West Coast less California	3.925	-0.017	-0.121
	California	4.081	-0.006	-0.066
Total	U.S.	3.988	-0.015	-0.018

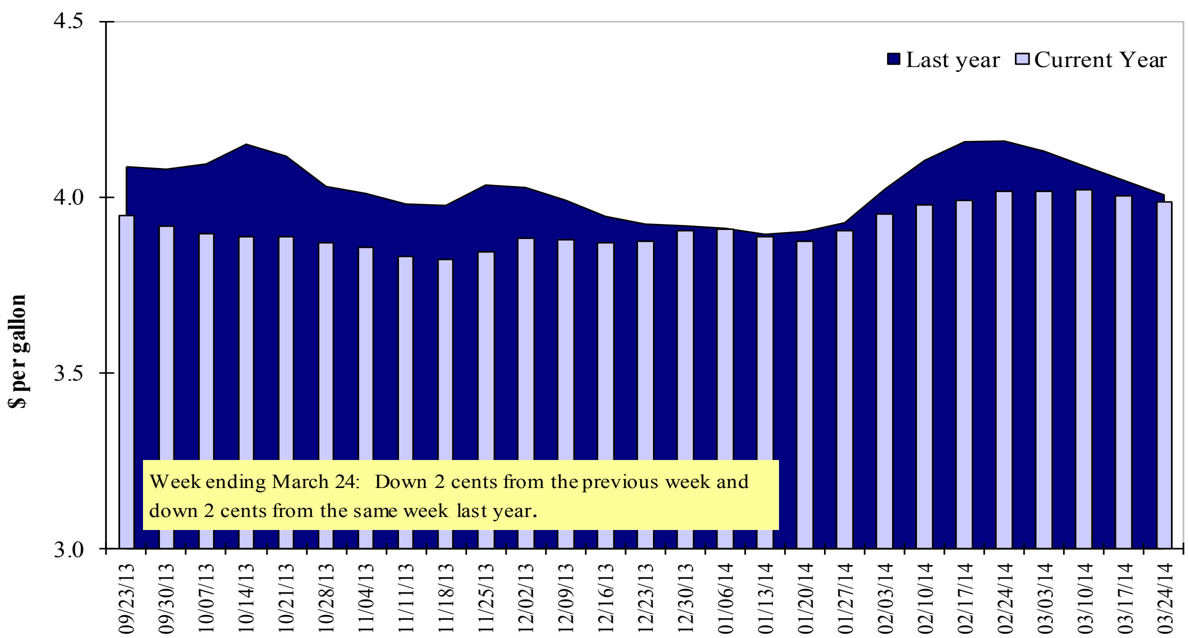
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[2]Same as North Central [3]Same as South Central

Source: Energy Information Administration/U.S. Department of Energy (www.eia.doe.gov)

Figure 13

Weekly Diesel Fuel Prices, U.S. Average



Source: Retail On-Highway Diesel Prices, Energy Information Administration, Dept. of Energy

Grain Exports

Table 12

U.S. Export Balances and Cumulative Exports (1,000 metric tons)

	Wheat						Corn	Soybeans	Total
Week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances[1]									
3/13/2014	1,685	968	1,687	1,088	163	5,591	18,796	5,317	29,704
This week year ago	1,816	1,460	1,196	754	90	5,315	4,607	3,707	13,629
Cumulative exports-marketing year[2]									
2013/14 YTD	9,318	6,356	4,742	3,186	322	23,925	20,168	39,115	83,208
2012/13 YTD	7,279	3,539	4,480	3,725	375	19,397	10,264	31,813	61,474
YTD 2013/14 as % of 2012/13	128	180	106	86	86	123	196	123	135
Last 4 wks as % of same period 2012/13	95	69	138	145	182	106	411	175	228
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 in effect for corn and soybeans

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

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

Table 13

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

Week ending 3/13/2014	Total Commitments[2] 2013/14 Current MY	2012/13 Last MY	% change current MY from last MY	Exports[3] 2012/13
	- 1,000 mt -			- 1,000 mt -
Japan	8,183	5,070	61	7,000
Mexico	8,970	3,458	159	4,370
China	4,062	2,249	81	2,450
Venezuela	680	396	72	1,158
Taiwan	1,200	383	213	512
Top 5 Importers	**23,096**	**11,556**	**100**	**15,490**
Total US corn export sales	**38,964**	**14,871**	**162**	**18,670**
% of Projected	94%	80%		
Change from prior week	746	92		
Top 5 importers' share of U.S. corn export sales	59%	78%		83%
USDA forecast, March 2014	**41,348**	**18,601**	**122**	
Corn Use for Ethanol USDA forecast, March 2014	**127,000**	**118,059**	**8**	

(n) indicates negative number.

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

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

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

Table 14

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

Week Ending 3/13/2014	Total Commitments[2] 2013/14 Current MY	2012/13 Last MY	% change current MY from last MY	Exports[3] 2012/13
	- 1,000 mt -			- 1,000 mt -
China	27,626	21,617	28	21,522
Mexico	2,864	1,911	50	2,565
Japan	1,557	1,438	8	1,751
Indonesia	1,929	1,132	70	1,682
Taiwan	1,042	1,014	3	1,120
Top 5 importers	**35,017**	**27,111**	**29**	**28,641**
Total US soybean export sales	**44,433**	**35,519**	**25**	**37,060**
% of Projected	107%	99%		
Change from prior week	153	108		
Top 5 importers' share of U.S. soybean export sales	79%	76%		
USDA forecast, March 2014	**41,689**	**35,967**	**16**	

(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)

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

Week Ending 3/13/2014	Total Commitments[2] 2013/14 Current MY	2012/13 Last MY	% change current MY from last MY	Exports[3] 2012/13
	- 1,000 mt -			- 1,000 mt -
Japan	2,682	3,313	(19)	3,544
Nigeria	2,563	2,762	(7)	3,002
Mexico	2,857	2,664	7	2,761
Philippines	1,819	1,794	1	1,965
Egypt	1,095	144	661	1,678
Korea	1,192	1,372	(13)	1,385
Taiwan	950	988	(4)	1,038
China	4,259	783	444	743
Brazil	3,910	225	1638	527
Colombia	723	549	32	600
Top 10 importers	**22,051**	**14,594**	**51**	**17,243**
Total US wheat export sales	**29,516**	**24,712**	**19**	**26,348**
% of Projected	92%	90%		
Change from prior week	402	485		
Top 10 importers' share of U.S. wheat export sales	75%	59%		65%
USDA forecast, March 2014	**32,016**	**27,439**	**17**	

(n) indicates negative number.

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

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

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

Table 16

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

Port regions	Week ending 03/20/14	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 2013	Last 4-weeks as % of 3-yr. avg.	Total[1] 2013
Pacific Northwest									
Wheat	254	274	93	2,553	2,851	90	117	108	11,585
Corn	188	0	n/a	1,133	996	114	97	75	2,973
Soybeans	336	261	128	4,125	3,124	132	121	129	9,090
Total	**778**	**535**	**145**	**7,812**	**6,972**	**112**	**116**	**110**	**23,647**
Mississippi Gulf									
Wheat	94	117	80	942	2,015	47	34	49	9,711
Corn	775	819	95	6,459	2,341	276	322	171	14,828
Soybeans	366	481	76	8,603	6,188	139	213	136	21,462
Total	**1,235**	**1,418**	**87**	**16,004**	**10,544**	**152**	**189**	**137**	**46,002**
Texas Gulf									
Wheat	192	112	172	1,579	1,284	123	98	84	9,039
Corn	0	0	n/a	144	42	338	85	40	255
Soybeans	0	0	n/a	255	122	208	n/a	0	908
Total	**192**	**112**	**172**	**1,977**	**1,448**	**137**	**97**	**71**	**10,203**
Interior									
Wheat	13	15	81	239	220	108	114	91	1,244
Corn	116	127	91	1,180	578	204	165	87	3,943
Soybeans	48	161	30	1,129	1,080	105	353	124	3,212
Total	**177**	**303**	**58**	**2,548**	**1,878**	**136**	**148**	**101**	**8,399**
Great Lakes									
Wheat	0	0	n/a	0	8	0	0	0	884
Corn	0	0	n/a	0	0	n/a	n/a	0	0
Soybeans	0	0	n/a	0	4	0	0	0	699
Total	**0**	**0**	**n/a**	**0**	**12**	**0**	**0**	**0**	**1,583**
Atlantic									
Wheat	0	0	n/a	31	279	11	0	0	645
Corn	11	0	n/a	31	2	n/a	n/a	39	242
Soybeans	12	75	16	845	606	140	233	329	1,652
Total	**23**	**75**	**31**	**907**	**886**	**102**	**114**	**204**	**2,540**
U.S. total from ports[2]									
Wheat	553	518	107	5,345	6,658	80	165	129	33,108
Corn	1,089	946	115	8,947	3,959	226	353	166	22,241
Soybeans	761	978	78	14,957	11,124	134	89	97	37,024
Total	**2,404**	**2,443**	**98**	**29,248**	**21,740**	**135**	**149**	**124**	**92,373**

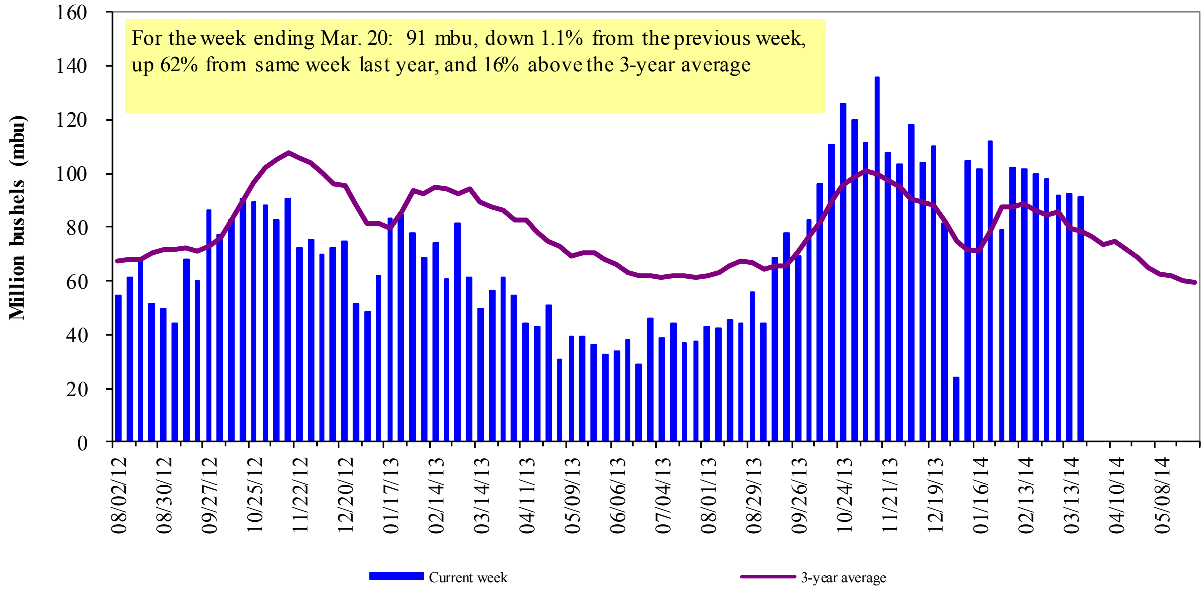
[1] Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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 61 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2013.

Figure 14

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

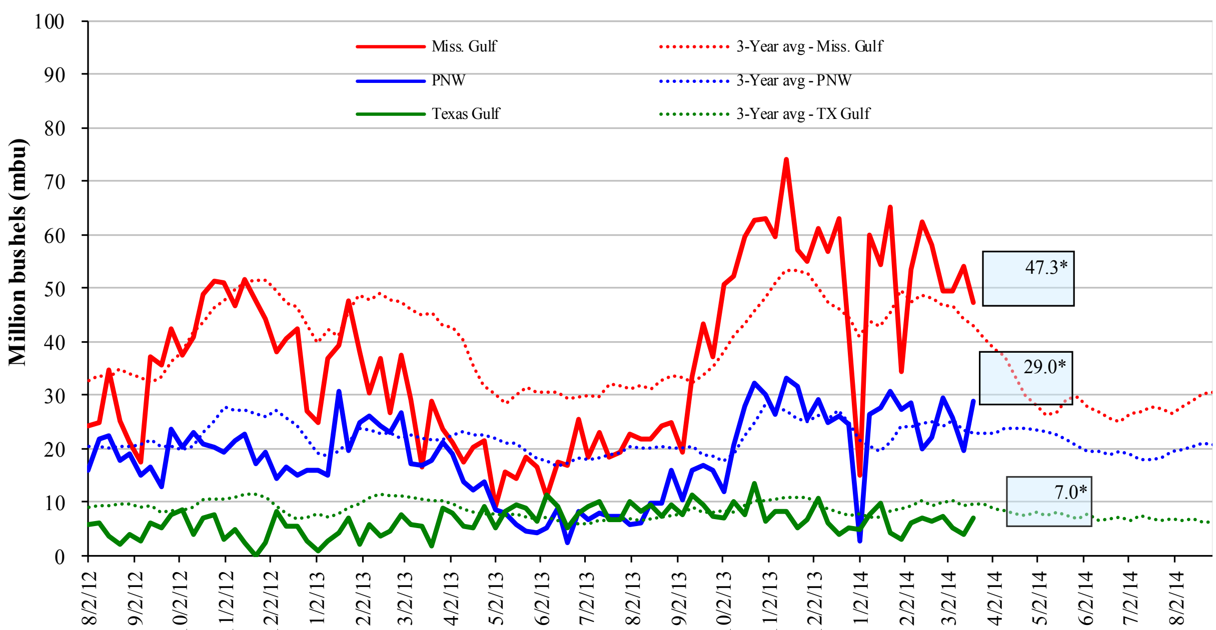


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

Mar. 20: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 13	up 72	down 7	up 47
Last year (same week)	up 65	up 268	up 77	up 64
3-yr avg. (4-wk mov. avg.)	up 27	down 16	up 19	up 30

Ocean Transportation

Table 17

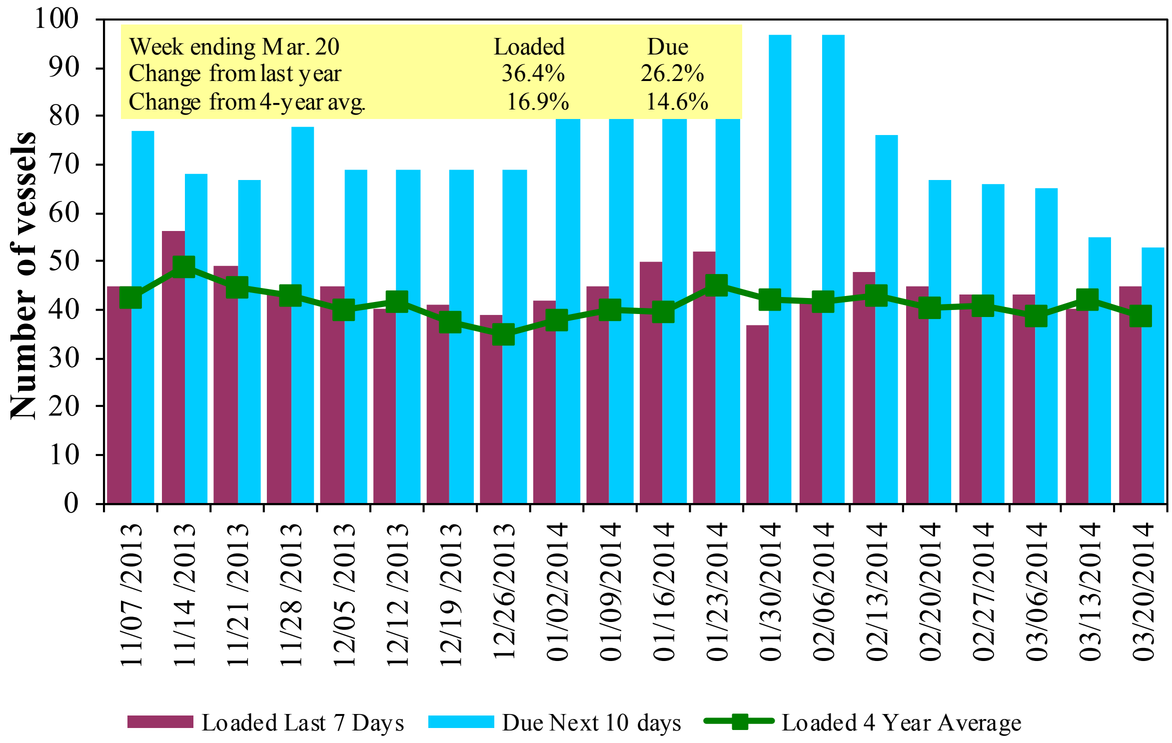
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
3/20/2014	77	45	53	17	n/a
3/13/2014	72	40	55	23	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. Gulf[1] Vessel Loading Activity

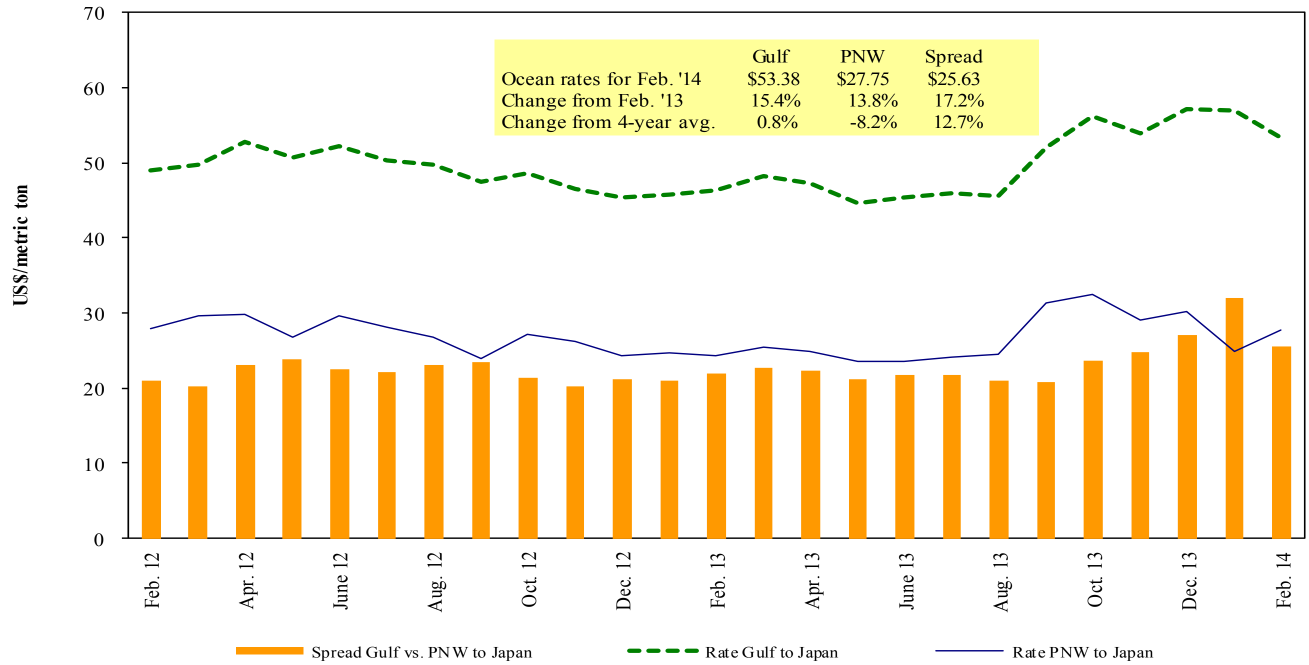


Source:Transportation & Marketing Programs/AMS/USDA

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

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18

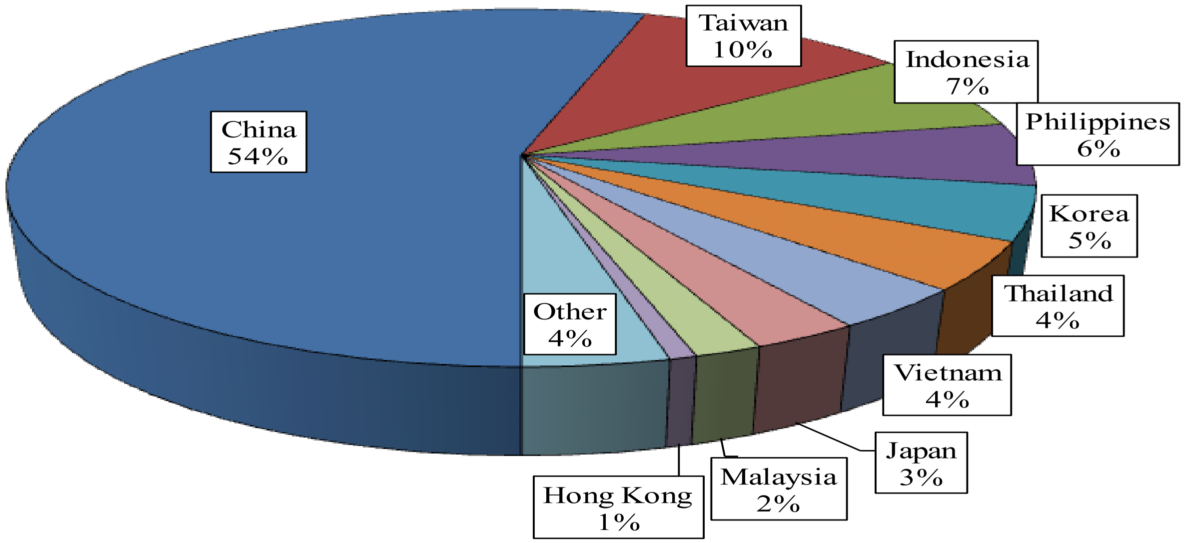
Ocean Freight Rates For Selected Shipments, Week Ending 3/22/2014

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Algeria	Wheat	Mar 10/15	28,000	38.00
U.S. Gulf	China	Heavy Grain	Feb 15/25	55,000	49.00
U.S. Gulf	Tanzania[1]	Wheat	Mar 24/Apr 4	16,100	133.31
PNW	Philippines	Soybean Meal	Mar 5/15	6,750	77.40
St. Lawrence	Algeria	Wheat	Mar 10/15	25,000	51.00
Brazil	China	Heavy Grain	Apr 5/15	60,000	42.75
Brazil	China	Heavy Grain	Apr 15/24	60,000	41.50
Brazil	China	Heavy Grain	Apr 1/30	60,000	42.25
Brazil	China	Heavy Grain	Mar 20/30	60,000	37.50 op 39.50
Brazil	China	Heavy Grain	Mar 20/25	60,000	40.50
Brazil	China	Heavy Grain	Mar 15/25	60,000	39.25
Brazil	China	Heavy Grain	Mar 1/10	60,000	38.50
Brazil	China	Heavy Grain	Mar 3/7	60,000	40.00
Brazil	China	Heavy Grain	Mar 5/15	60,000	40.50
Brazil	China	Heavy Grain	Mar 10/20	60,000	39.50
Brazil	Egypt	Heavy Grain	Apr 1/10	68,000	25.00
Brazil	Italy	Soybeans	Mar 12/17	25,000	32.00

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 2013

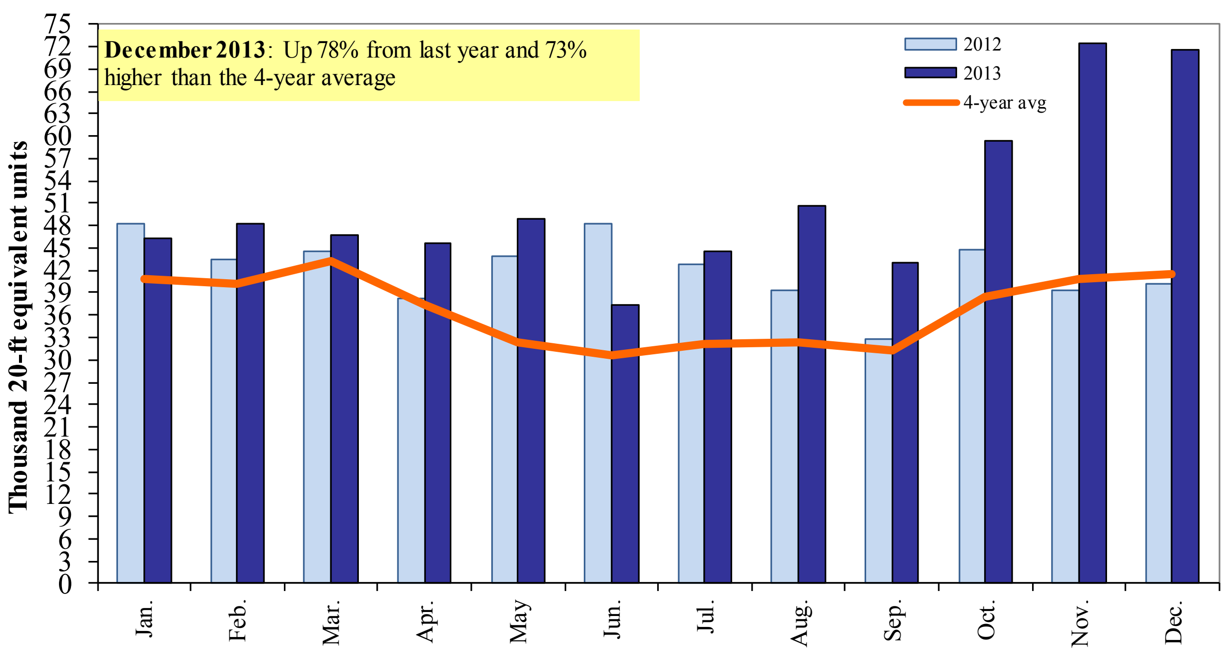


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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