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release is
April 4, 2013



Grain Transportation Report

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WEEKLY HIGHLIGHTS

Frequent Precipitation Elevates Mississippi River Levels

With a return of near-normal and above-average precipitation to portions of the central United States, river levels have been adequate for barge navigation. The National Weather Service reported that a near-record daily total of 12.4 inches of snow fell on St. Louis, MO, on March 24. Warmer spring temperatures should rapidly melt snow accumulations and help maintain and possibly raise Mississippi River levels for the near future. For the week ending March 30, water levels will probably be in the 10–11 foot range, significantly higher than the monthly average of -3 feet that occurred in January. The U.S. Army Corps of Engineers reports that there are no current navigation issues as a result of the elevated river levels on the Mississippi River.

Coast Guard Publishes Proposed Rule Making for Port TWIC Readers

On March 22, the U.S. Coast Guard published a Notice of Proposed Rule Making (NPRM) detailing the guidelines for purchasing electronic card readers for port facilities to verify Transportation Workers Identification Credential cards (TWIC). A TWIC, issued by the Transportation Security Administration, is required for all employees needing unescorted access to secure areas of ports around the country. The NPRM only requires ports classified in Group A (high-risk facilities) to use an electronic TWIC reader. The public has until May 21 to provide comments to the NPRM. Once the final rule is published, port officials will have 2 years to install appropriate equipment.

Negotiation Impasse Continues Between Longshore Union and Northwest Grain Terminal Operators

On Friday, March 22, negotiations between three grain companies and the West Coast Longshore Union broke down, and the planned bargaining session for Saturday was canceled. This was the first contract talk between the parties in 3 months. The International Longshore and Warehouse Union issued a statement on Friday attributing the break down in negotiation to the refusal by “the three foreign-based employers” to even discuss the agreement that the Union had with Temco, a U.S.-based company owned by CHS and Cargill, during earlier negotiations. United Grain Corp., Columbia Grain, Louis Dreyfus Commodities, and Temco are members of Pacific Northwest Grain Handlers Association, which were bargaining collectively with the Union until Temco defected to negotiate its own deal. The spokesman for the three companies said they want contract parity with their competitors in Longview and Kalama.

Corn Inspections Up for Second Week; Soybeans Rebound

For the week ending March 21, the total amount of corn inspected for export from all major export regions reached .438 million metric tons (mmt), up 8 percent from the past week but 46 percent below last year this time. Corn inspections were up for the second consecutive week, with increased shipments to Asia and Latin America. Soybean inspections (.503 mmt) jumped 84 percent as shipments to Asia rebounded from the previous week. The increased demand for corn and soybeans also pushed Mississippi Gulf grain inspections up 74 percent from the past week. Wheat inspections (.539 mmt), however, dropped for the second consecutive week because of reduced demand from Africa. Total inspections of all major grains totaled 1.48 mmt, up 11 percent from the past week, but 15 percent below last year at this time.

Snapshots by Sector

Rail

U.S. railroads originated 17,379 **carloads of grain** during the week ending March 16, down 1 percent from last week, 19 percent from last year, and were 24 percent lower than the 3-year average.

During the week ending March 21, average April non-shuttle **secondary railcar bids/offers per car** were at tariff, \$17.50 lower than last year. Average shuttle bids/offers were \$121 below tariff, down \$33 from last week and \$91.50 higher than last year.

Ocean

During the week ending March 21, 33 **ocean-going grain vessels** were loaded in the Gulf, 10 percent more than the same period last year. Forty-two vessels are expected to be loaded within the next 10 days, 11 percent more than the same period last year.

During the week ending March 22, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$49 per mt, up 2 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$26 per mt, 4 percent greater than the previous week.

Barge

During the week ending March 23, **barge grain movements** totaled 371,085 tons, 16 percent lower than the previous week and 52 percent lower than the same period last year.

During the week ending March 23, 248 grain barges **moved down river**, down 14.5 percent from last week; 397 grain barges were **unloaded in New Orleans**, down 11.4 percent from the previous week.

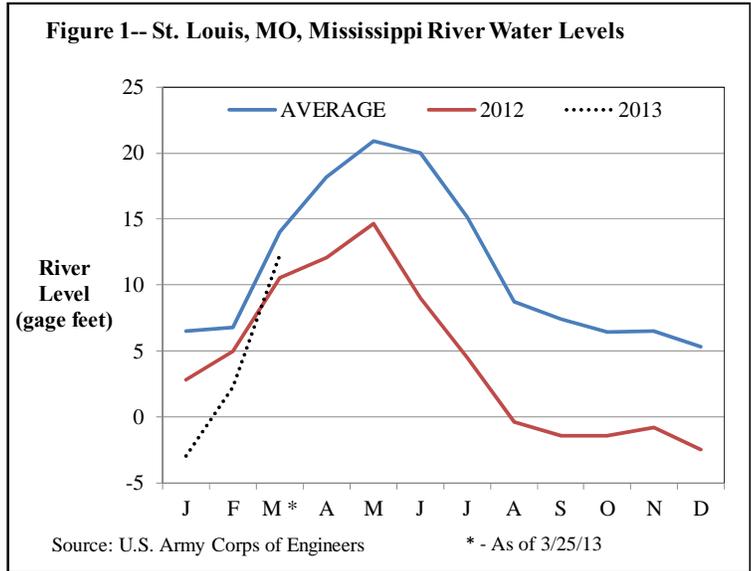
Fuel

During the week ending March 25, U.S. average **diesel fuel prices** were down 4 cents from the previous week at \$4.01 per gallon—14 cents lower than the same week last year.

Feature Article/Calendar

River Levels Increase, Barge Tonnages Decreased 10 percent in 2012

River Levels in 2013: Drought conditions that began in 2012 produced extended periods of extremely low water levels on the Mississippi River and its tributaries. Figure 1 shows that during 2012 the monthly average Mississippi River levels at St. Louis, MO, were below the 10-year average for the entire 12 months. River levels in January and February of 2013 were below both the 10-year average and 2012 levels. However, the average March levels have risen substantially, surpassing last year's average March levels. River levels have been adequate for navigation because rain and snow storms have supplied water for normal barge drafts of 9 feet or greater. During storms in mid-March, parts of eastern Missouri and southwestern Illinois received 4 inches or more of rain. Runoff from rains and previous snow storms has been filling rivers that were too shallow for normal navigation between December and February. During that time, the river did not shut down due to low water restrictions, but barges were required to light load. Also during this period, groundings and other incidents caused temporary closures, which required dredging to reopen the river. One of the more significant developments was the successful removal of underwater rock formations that had the potential to severely limit the depths of the Mississippi River between St. Louis, MO, and Cairo, IL.



**Figure 2 – Precipitation During Underwater Rock Removal
January-February 2013 Statewide Ranks**
National Climatic Data Center/NESDIS/NOAA

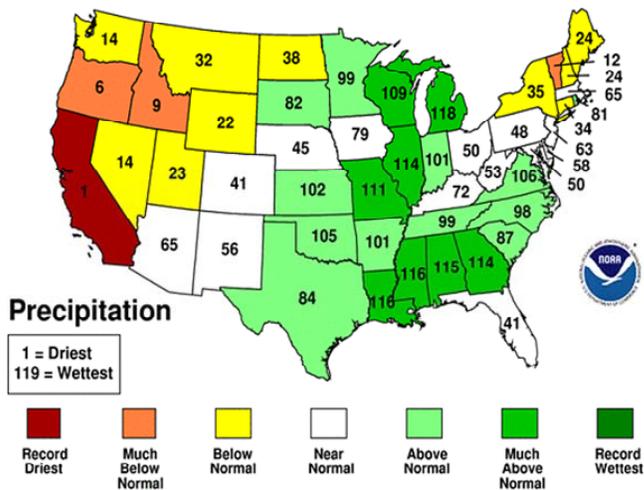


Figure 2 shows the amount of precipitation relative to historic levels that occurred during the underwater rock removal process. The map, which was prepared by the National Oceanic and Atmospheric Administration, shows the rankings for precipitation by State during the January-February period for the last 119 years. California has had the least amount of precipitation during January-February this year—the driest on record. Michigan, with a rank of 118, has had the second wettest January-February in 119 years. With the exception of Iowa and Kentucky, all States bordering the Mississippi River are ranked above or much above normal precipitation this year. However, despite above normal rainfall during January and February, water levels remain below average after nearly a year of drought conditions have drawn down water levels on the river.

Reduced Barge Movements for 2012: Table 1 shows annual tonnages at strategically selected locks on the Mississippi, Illinois, Ohio, and

Arkansas Rivers. Total tonnages are measured by summing the tons moved at the Mississippi River Locks 27, Ohio Locks 52, and Arkansas Lock 1. In 2012, total tonnage was down 9.5 percent from the 5-year average. Decreased export demand, drought-reduced production, and distressed navigation conditions were contributing factors to the lower grain barge tonnages for 2012.

A significant decrease in tonnages occurred at Illinois River Lock 8, where a 22.1 percent reduction in downbound tonnages occurred. Grain tonnages on the Arkansas River in 2012 increased 13.2 percent, and Ohio River volumes were about the same as average.

Table 1 - Annual Downbound Grain Tonnages, by River Lock, 2007 - 2012

RIVER	LOCK	2007	2008	2009	2010	2011	5 year average	2012	2012 change from average
million tons									
MS	15	9.6	5.8	8.8	8.3	7.7	8.1	7.6	-5.8%
MS	25	16.0	10.7	14.8	12.8	12.0	13.3	11.8	-10.9%
MS	26	27.4	19.9	26.6	23.8	20.8	23.7	20.1	-15.3%
MS	27	27.0	20.0	26.9	24.5	21.4	23.9	20.6	-13.9%
IL	8	9.5	7.6	9.6	9.3	7.9	8.8	6.8	-22.1%
OH	52	5.6	6.1	7.3	7.9	7.2	6.8	6.8	-0.1%
AR	1	1.8	1.8	1.7	2.2	1.8	1.9	2.1	13.2%
Totals for MS 27, OH 52, and AR 1		34.4	27.8	35.9	34.6	30.4	32.6	29.5	-9.5%

Source: U.S. Army Corps of Engineers

Table 2 contains general information for the locks used in the barge analysis of grain movements. The information shows the location and size of the individual locks. Export grain traffic at MS 15, MS 25, MS 26, or IL 8 must go through MS 27 to get to Mississippi River Gulf elevators.

Table 2 - Lock Descriptions and Characteristics

River	Lock	Other Names	Location	Description	Notes
MS	15		Rock Island, IL	600-foot main chamber 360-foot auxiliary chamber	MS 15 is typically closed during the winter because of ice conditions.
MS	25		Winfield, MO	600-foot single chamber	MS 25 is the last downbound lock before the confluence with the Illinois River.
MS	26	Melvin Price Locks and Dam	E. Alton, IL	1,200-foot main chamber 600-foot auxiliary chamber	MS 26 includes downbound traffic from the Illinois River.
MS	27	Chain of Rocks Locks	Granite City, IL	1,200-foot main chamber 600-foot auxiliary chamber	MS 27 tonnage is considered the consolidated total for downbound traffic from the Upper Mississippi, Illinois, and Missouri Rivers.
IL	8	La Grange Lock and Dam	Versailles, IL	600-foot single chamber	IL 8 is the last downbound lock on the Illinois River.
OH	52		Brookport, IL	1,200-foot main chamber 600-foot auxiliary chamber	Tonnages at OH 52 are considered the downbound total for the Ohio River.
AR	1	Norrell Lock and Dam on the McClellan-Kerr Arkansas River System	Tichnor, IL	600-foot single chamber	Tonnages at AR 1 are considered the downbound total for the Arkansas River.

Source: U.S. Army Corps of Engineers

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Grain Transportation Indicators

Table 1
Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
03/27/13	269	232	203	163	219	184
03/20/13	274	232	208	171	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)

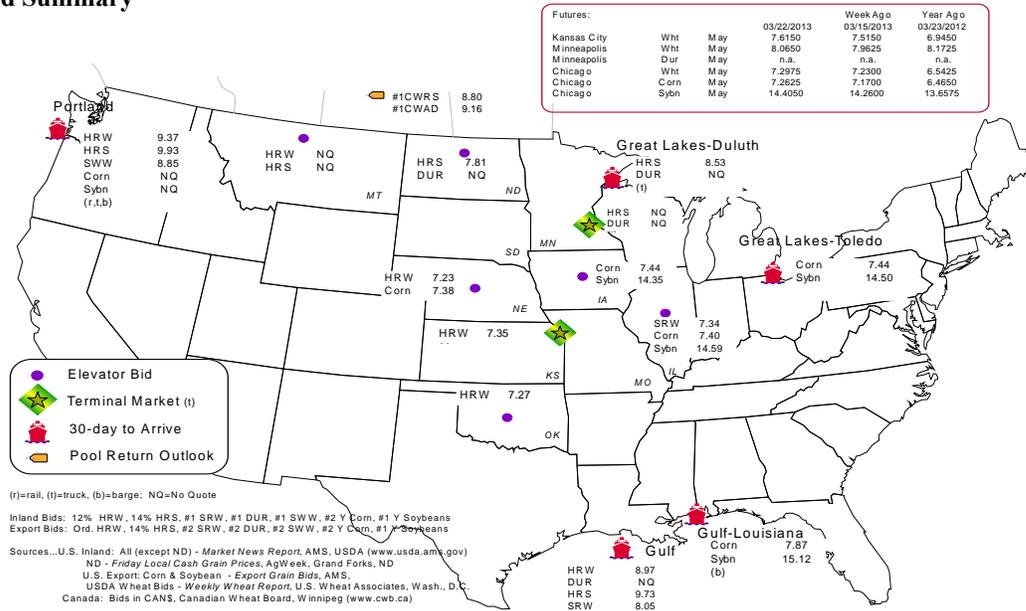
Commodity	Origin--Destination	3/22/2013	3/15/2013
Corn	IL--Gulf	-0.47	-0.53
Corn	NE--Gulf	-0.49	-0.55
Soybean	IA--Gulf	-0.77	-0.72
HRW	KS--Gulf	-1.62	-1.62
HRS	ND--Portland	-2.12	-2.15

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				
03/20/2013 ^p	148	1,252	3,361	182		4,943	03/16/13	1,011
03/13/2013 ^r	0	998	3,843	339		5,180	03/09/13	1,358
2013 YTD ^r	7,581	10,112	50,016	7,716		75,425	2013 YTD	12,938
2012 YTD ^r	3,176	8,260	55,130	6,107		72,673	2012 YTD	24,548
2013 YTD as % of 2012 YTD	239	122	91	126		104	% change YTD	53
Last 4 weeks as % of 2012 ²	31	146	80	73		85	Last 4wks % 2012	49
Last 4 weeks as % of 4-year avg. ²	13	71	96	51		77	Last 4wks % 4 yr	59
Total 2012	22,604	40,780	199,419	32,375		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 the Association of American Railroads reported weekly carloads received by Mexican railroads to reflect switching between KCSM and Ferromex.

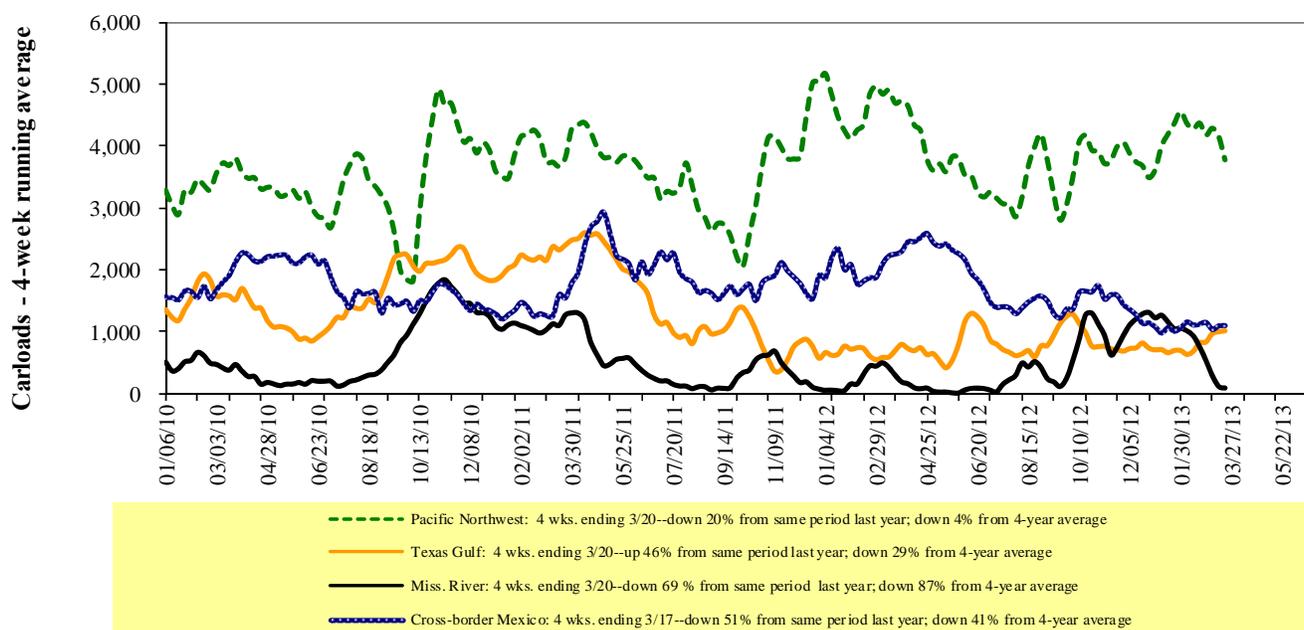
YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

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

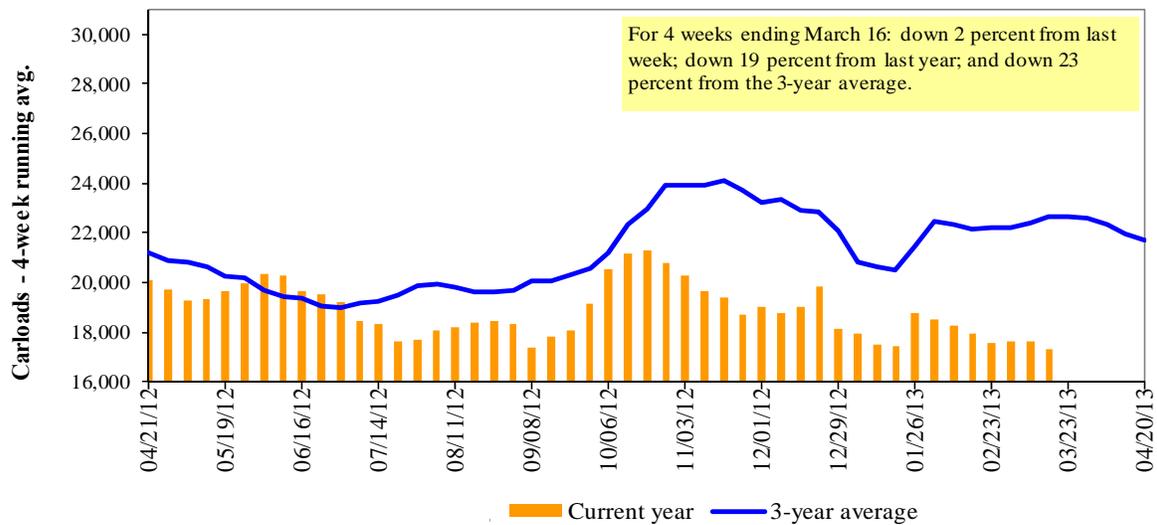
Table 4

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
03/16/13	1,239	2,381	9,264	531	3,964	17,379	3,025	4,899
This week last year	2,384	2,812	10,780	633	4,887	21,496	3,713	4,648
2013 YTD	17,093	28,510	104,578	5,433	41,871	197,485	38,545	57,862
2012 YTD	23,986	32,539	113,903	5,517	55,773	231,718	41,562	56,376
2013 YTD as % of 2012 YTD	71	88	92	98	75	85	93	103
Last 4 weeks as % of 2012	69	82	84	93	77	81	81	92
Last 4 weeks as % of 3-yr avg. ¹	65	78	83	77	67	77	76	95
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								
	3/21/2013	Apr-13	Apr-12	May-13	May-12	Jun-13	Jun-12	Jul-13	Jul-12
BNSF ³									
COT grain units	1	0	no bids	0	no bids	no bids	no bids	no bids	no offer
COT grain single-car ⁵	0 . . 5	0 . . 10	0 . . 10	10	no bids	10	0	0 . . 10	
UP ⁴									
GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no bids	n/a	n/a	
GCAS/Region 2	no bids	1	no bids	no bids	no bids	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.

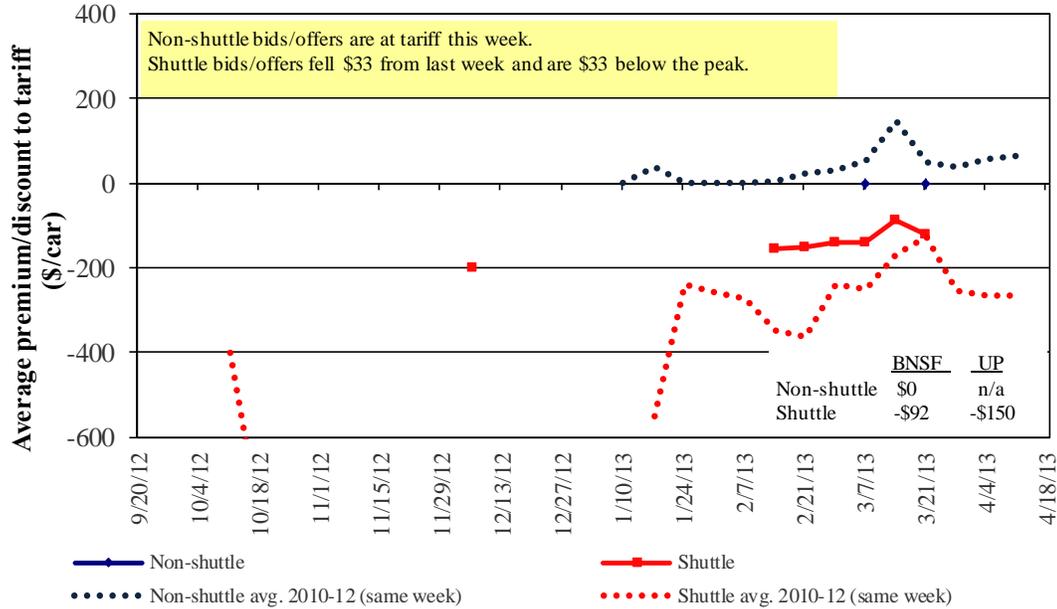
⁵Range is shown because average is not available. Not available = n/a.

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 April 2013, Secondary Market

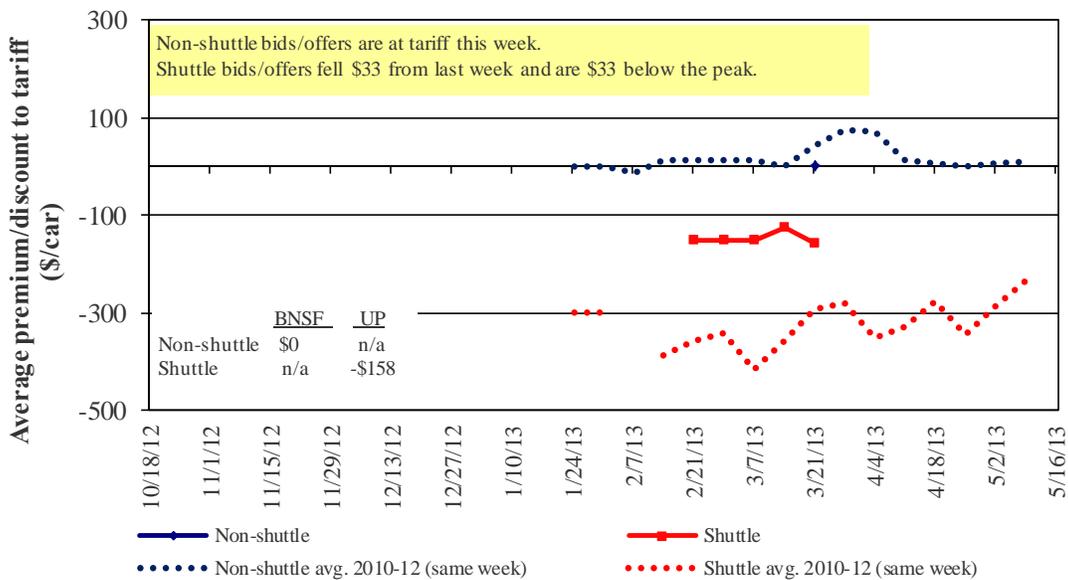


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

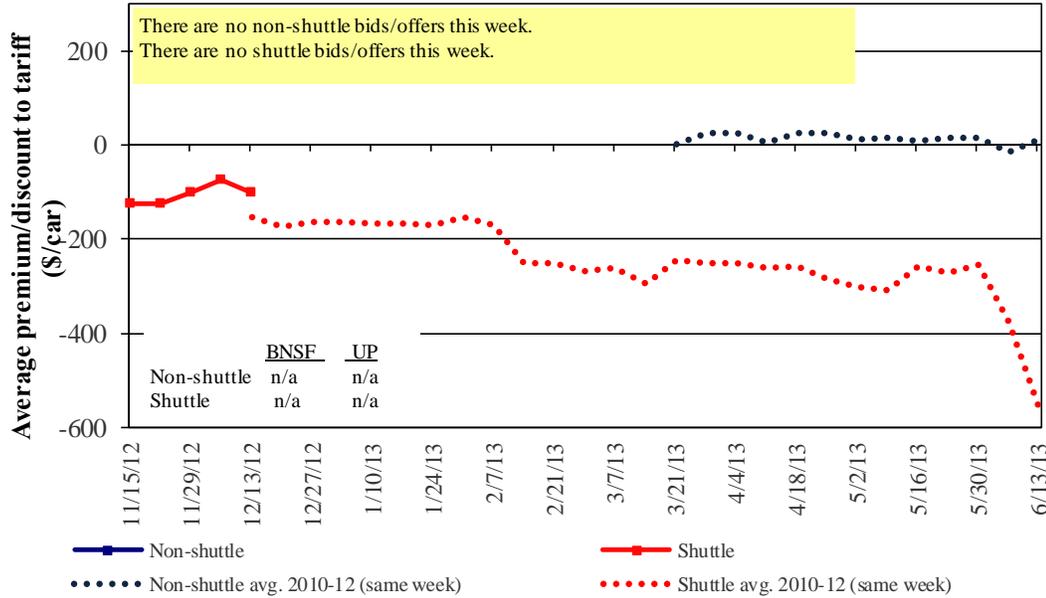


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in June 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					
	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13
Non-shuttle						
BNSF-GF	-	-	n/a	n/a	n/a	n/a
Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	(10)	n/a	n/a	n/a	n/a	n/a
UP-Pool	n/a	n/a	n/a	n/a	n/a	n/a
Change from last week	n/a	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	(92)	n/a	n/a	n/a	n/a	n/a
Change from last week	(54)	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	108	n/a	n/a	n/a	n/a	n/a
UP-Pool	(150)	(158)	n/a	n/a	(125)	(125)
Change from last week	(12)	(33)	n/a	n/a	(25)	(25)
Change from same week 2011	75	142	n/a	n/a	n/a	75

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 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:				Fuel	Tariff plus surcharge per:		Percent
3/1/2013	Origin region*	Destination region*	Tariff rate/car	surcharge per car	metric ton	bushe ^l ²	change Y/Y ³
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
	Des Moines, IA	Los Angeles, CA	\$5,065	\$675	\$57.00	\$1.55	2
Soybeans	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
	Council Bluffs, IA	Stockton, CA	\$4,200	\$684	\$48.50	\$1.32	1
Soybeans	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

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	Cuautitlan, 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

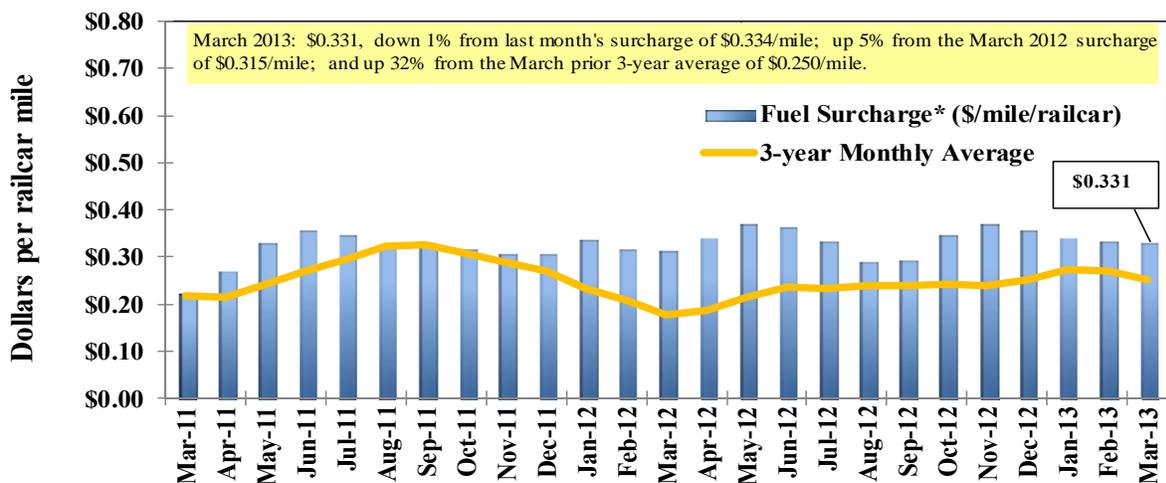
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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.

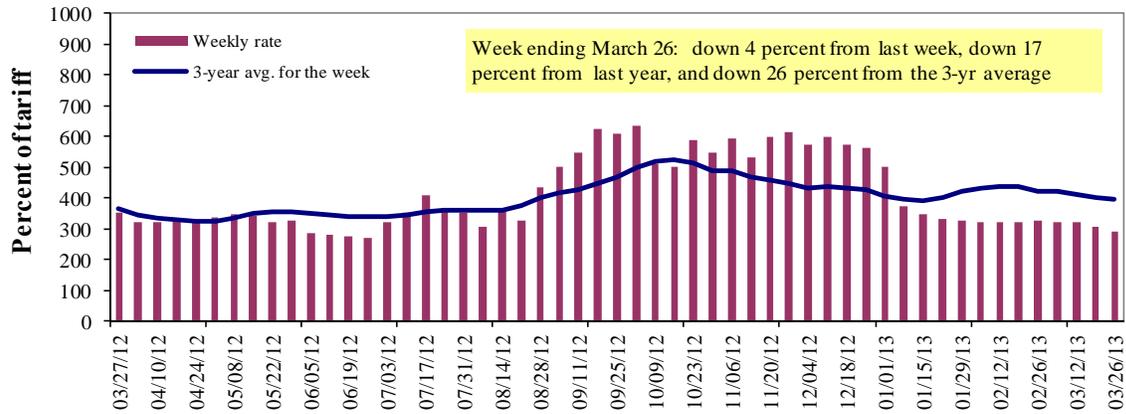
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

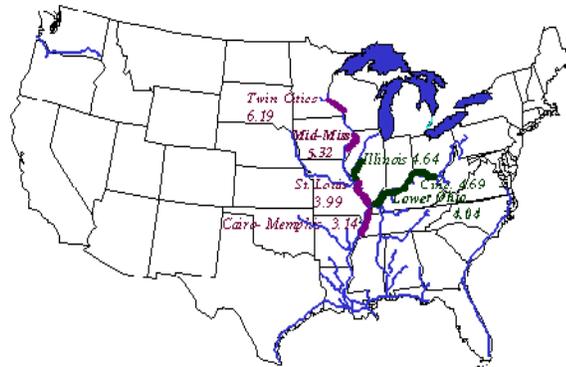
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid- Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo- Memphis
Rate¹	3/26/2013	-	298	293	245	205	205	177
	3/19/2013	-	312	307	250	208	208	185
\$/ton	3/26/2013	-	15.85	13.60	9.78	9.61	8.28	5.56
	3/19/2013	-	-	14.24	9.98	9.76	8.40	5.81
Current week % change from the same week:								
	Last year	-	-20	-17	-2	-32	-32	-20
	3-year avg. ²	-	-32	-26	-18	-40	-40	-34
Rate¹	April	-	293	293	240	205	205	180
	June	331	290	288	240	205	205	183

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



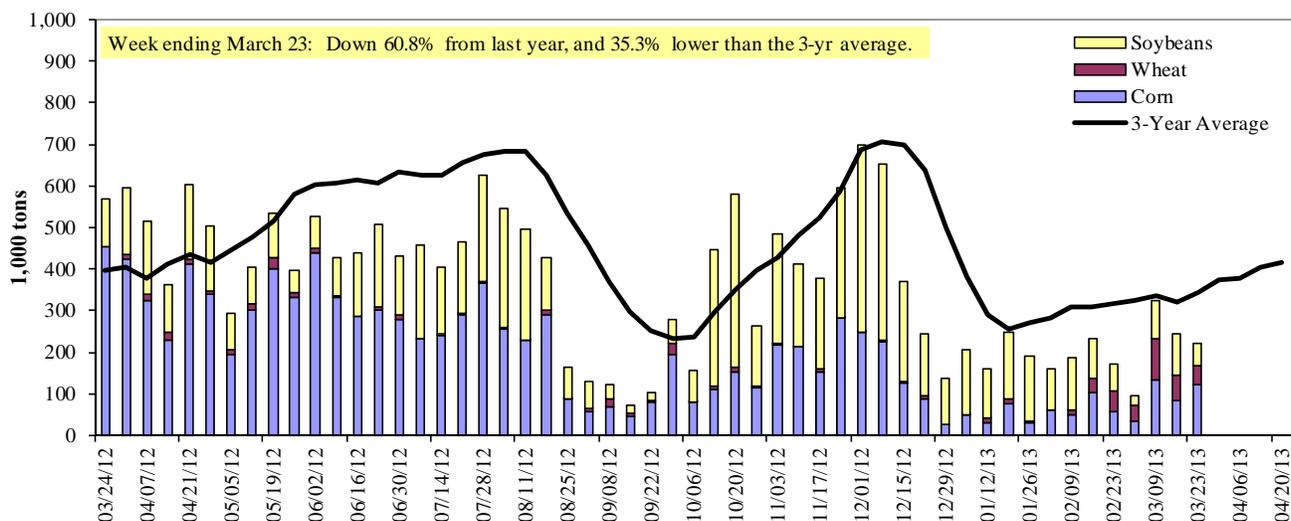
Calculating barge rate per ton:

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

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 3/23/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	10	0	13	0	22
Winfield, MO (L25)	68	9	39	0	117
Alton, IL (L26)	120	40	42	5	207
Granite City, IL (L27)	120	48	55	5	227
Illinois River (L8)	44	14	5	5	68
Ohio River (L52)	26	33	42	0	100
Arkansas River (L1)	0	34	10	0	43
Weekly total - 2013	146	114	106	5	371
Weekly total - 2012	546	42	162	27	777
2013 YTD ¹	1,366	1,050	2,852	56	5,324
2012 YTD	4,088	365	2,866	86	7,405
2013 as % of 2012 YTD	33	288	100	65	72
Last 4 weeks as % of 2012 ²	51	43	70	20	76
Total 2012	14,837	1,794	12,663	229	29,523

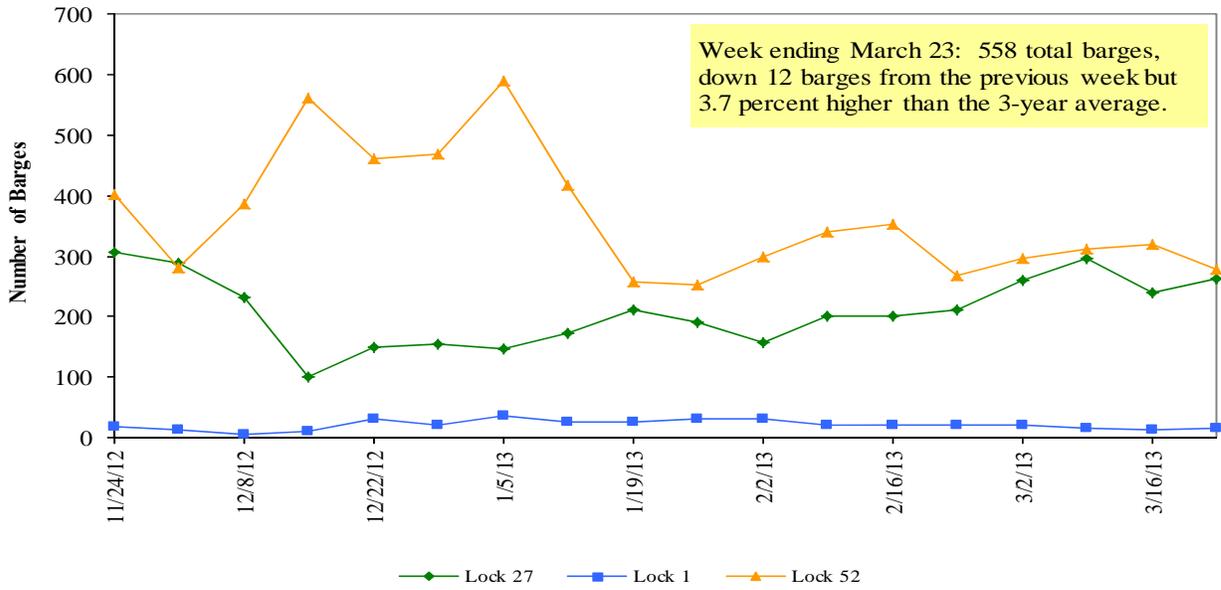
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2012.

Note: Total may not add exactly, due to rounding

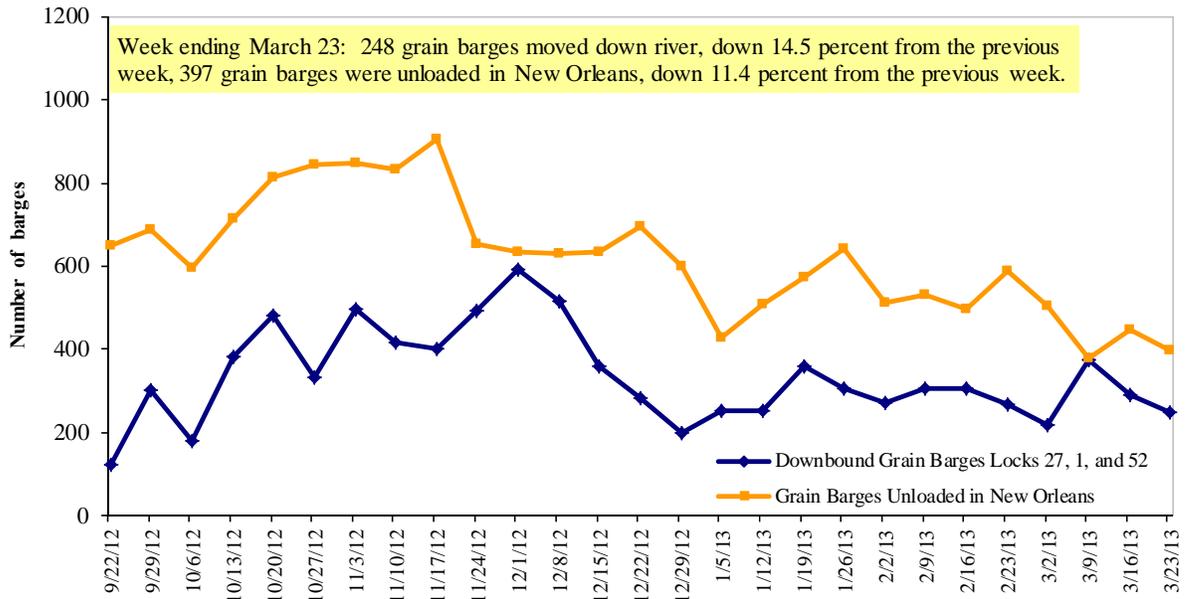
Source: U.S. Army Corps of Engineers

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 3/25/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.050	-0.032	-0.140
	New England	4.171	-0.033	-0.092
	Central Atlantic	4.109	-0.031	-0.170
	Lower Atlantic	3.983	-0.033	-0.127
II	Midwest ²	3.979	-0.036	-0.067
III	Gulf Coast ³	3.935	-0.054	-0.120
IV	Rocky Mountain	3.935	-0.036	-0.201
V	West Coast	4.101	-0.061	-0.332
	West Coast less California	4.046	-0.059	-0.337
	California	4.147	-0.065	-0.329
Total	U.S.	4.006	-0.041	-0.141

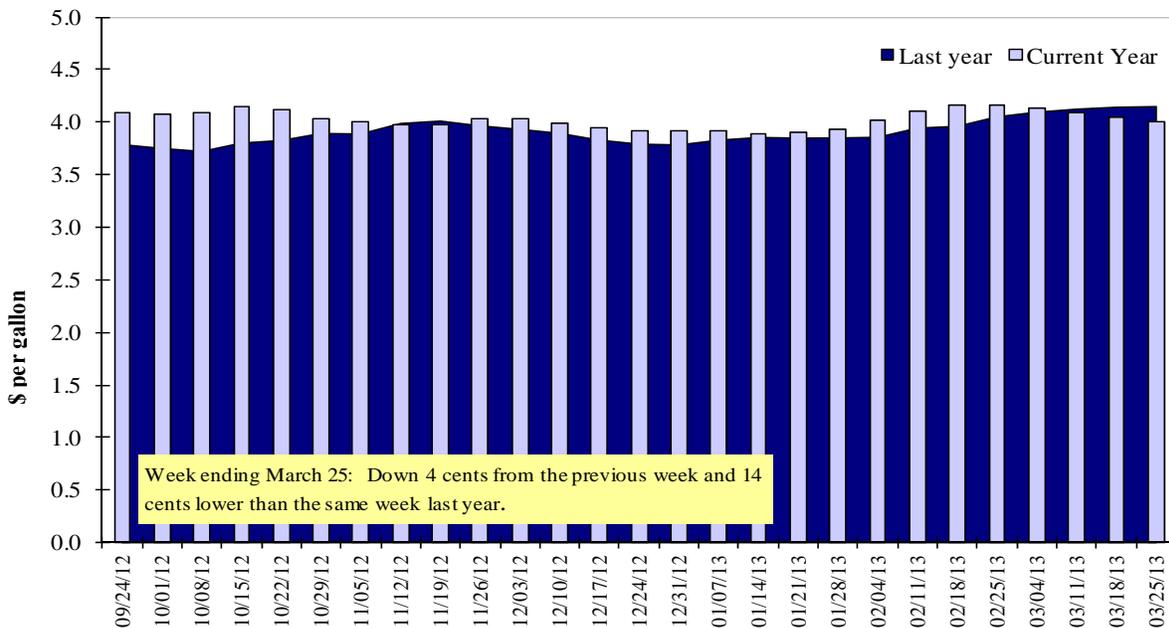
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
3/14/2013	1,815	1,460	1,196	754	90	5,315	4,607	3,707	13,629
This week year ago	1,208	855	1,167	1,405	55	4,689	10,432	5,133	20,254
Cumulative exports-marketing year²									
2012/13 YTD	7,279	3,539	4,480	3,725	375	19,397	10,264	31,899	61,560
2011/12 YTD	7,935	2,754	5,147	4,275	388	20,498	22,566	25,708	68,772
YTD 2012/13 as % of 2011/12	92	129	87	87	97	95	45	124	90
Last 4 wks as % of same period 2011/12	147	184	103	55	172	115	48	78	71
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 03/14/2013	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	5,070	9,132	(44)	12,367
Mexico	3,458	8,313	(58)	9,617
China	2,249	3,798	(41)	5,414
Korea	358	3,376	(89)	3,639
Venezuela	396	688	(42)	1,332
Top 5 Importers	11,531	25,307	(54)	32,369
Total US corn export sales	14,871	32,998	(55)	39,180
% of Projected	71%	84%		
Change from prior week	92	862		
Top 5 importers' share of U.S. corn export sales	78%	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 03/14/2013	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	21,617	20,410	6	24,602
Mexico	1,911	2,255	(15)	3,180
Japan	1,438	1,398	3	1,891
Indonesia	1,132	1,048	8	1,741
Egypt	645	772	(16)	1,292
Top 5 importers	26,742	25,884	3	32,706
Total US soybean export sales	35,605	30,841	15	37,060
% of Projected	97%	83%		
Change from prior week	108	357		
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 03/14/2013	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	3,313	3,453	(4)	3,512
Mexico	2,664	3,249	(18)	3,496
Nigeria	2,762	2,926	(6)	3,248
Philippines	1,794	1,994	(10)	2,039
Korea	1,372	1,846	(26)	1,983
Egypt	1,362	504	170	950
Taiwan	988	830	19	888
Indonesia	435	734	(41)	830
Venezuela	598	598	0	594
Iraq	209	572	(63)	572
Top 10 importers	15,497	16,706	(7)	18,111
Total US wheat export sales	24,712	25,187	(2)	28,560
% of Projected	89%	88%		
Change from prior week	485	539		
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 03/21/13	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	325	210	154	2,933	3,139	93	77	99	12,625
Corn	86	110	79	996	1,311	76	76	63	5,512
Soybeans	66	137	48	3,058	3,035	101	88	87	10,347
Total	477	457	104	6,987	7,485	93	81	86	28,484
Mississippi Gulf									
Wheat	152	215	71	2,015	1,309	154	159	199	5,462
Corn	297	195	152	2,341	5,476	43	63	43	18,068
Soybeans	314	28	1,123	6,188	6,571	94	68	60	24,684
Total	763	438	174	10,544	13,357	79	80	66	48,215
Texas Gulf									
Wheat	50	114	44	1,262	1,112	113	129	65	5,912
Corn	2	33	7	42	150	28	33	22	336
Soybeans	0	0	n/a	122	0	n/a	n/a	0	626
Total	52	147	35	1,427	1,262	113	108	55	6,874
Interior									
Wheat	13	22	57	219	233	94	208	59	1,218
Corn	52	68	78	564	2,060	27	114	33	6,115
Soybeans	98	84	117	1,077	1,014	106	54	103	4,204
Total	163	173	94	1,860	3,307	56	61	57	11,538
Great Lakes									
Wheat	0	5	0	8	0	n/a	n/a	251	481
Corn	0	0	n/a	0	14	0	n/a	0	56
Soybeans	0	0	n/a	4	2	199	100	300	713
Total	0	5	9	12	16	73	666	257	1,250
Atlantic									
Wheat	0	87	0	279	2	n/a	n/a	7,075	341
Corn	0	0	n/a	2	50	4	0	0	143
Soybeans	24	24	101	604	388	156	106	126	1,460
Total	24	111	22	885	439	202	208	223	1,944
U.S. total from ports²									
Wheat	539	654	82	6,717	5,795	116	114	113	26,040
Corn	438	405	108	3,944	9,060	44	54	43	30,230
Soybeans	503	273	184	11,053	11,010	100	81	74	42,035
Total	1,480	1,332	111	21,714	25,865	84	81	71	98,305

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

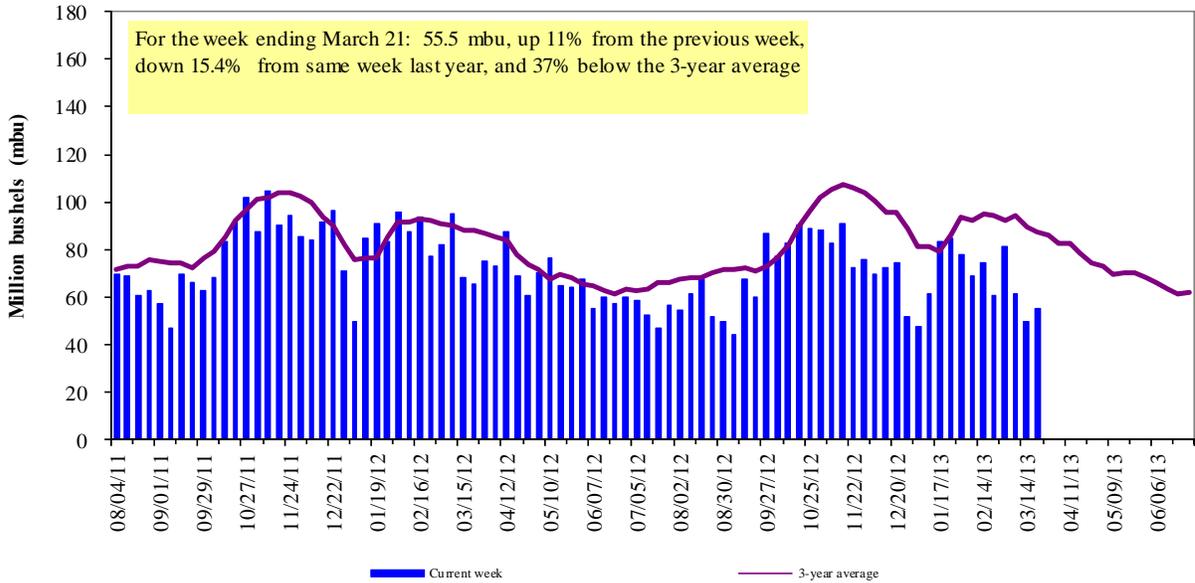
² Total includes only port regions shown above; Interior land-based shipments now included.

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)

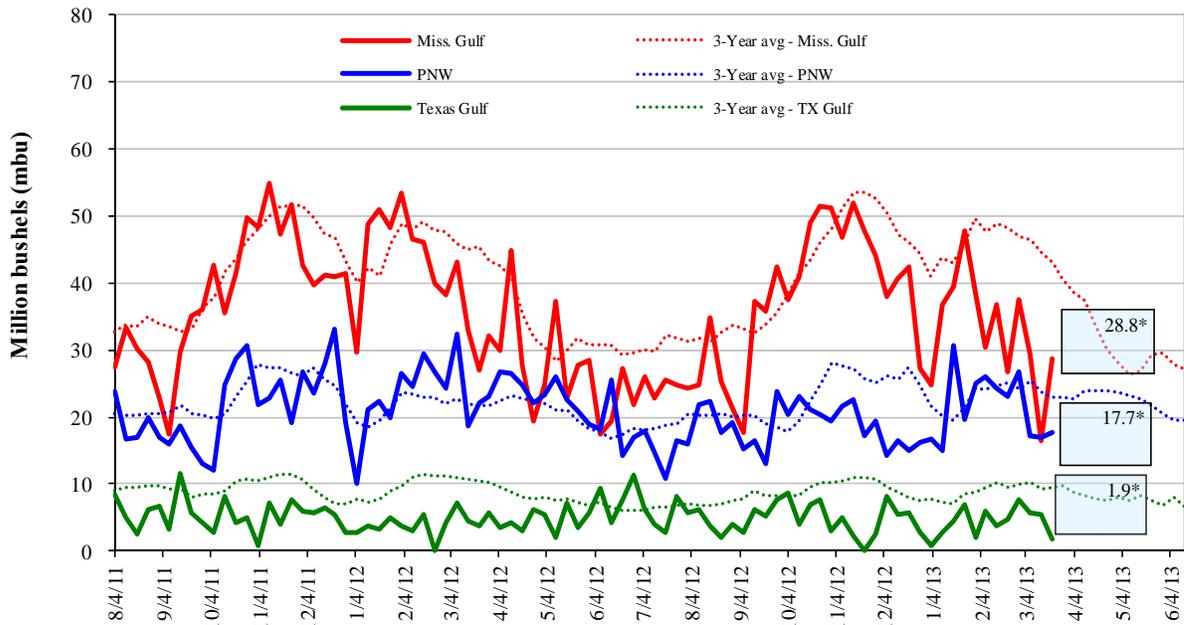


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

March 21 % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	up 74	down 65	up 39	up 4
Last year (same week)	up 7	down 48	up 0.5	down 20
3-yr avg. (4-wk mov. avg.)	down 33	down 80	down 42	down 26

Ocean Transportation

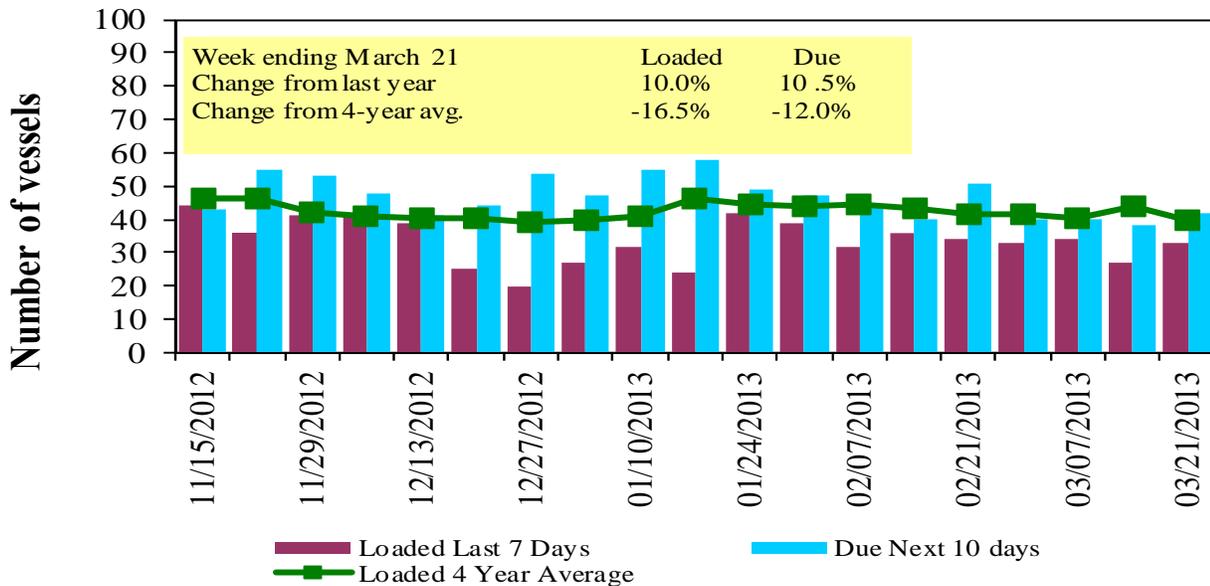
Table 17

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
3/21/2013	23	33	42	9	n/a
3/14/2013	27	27	38	13	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

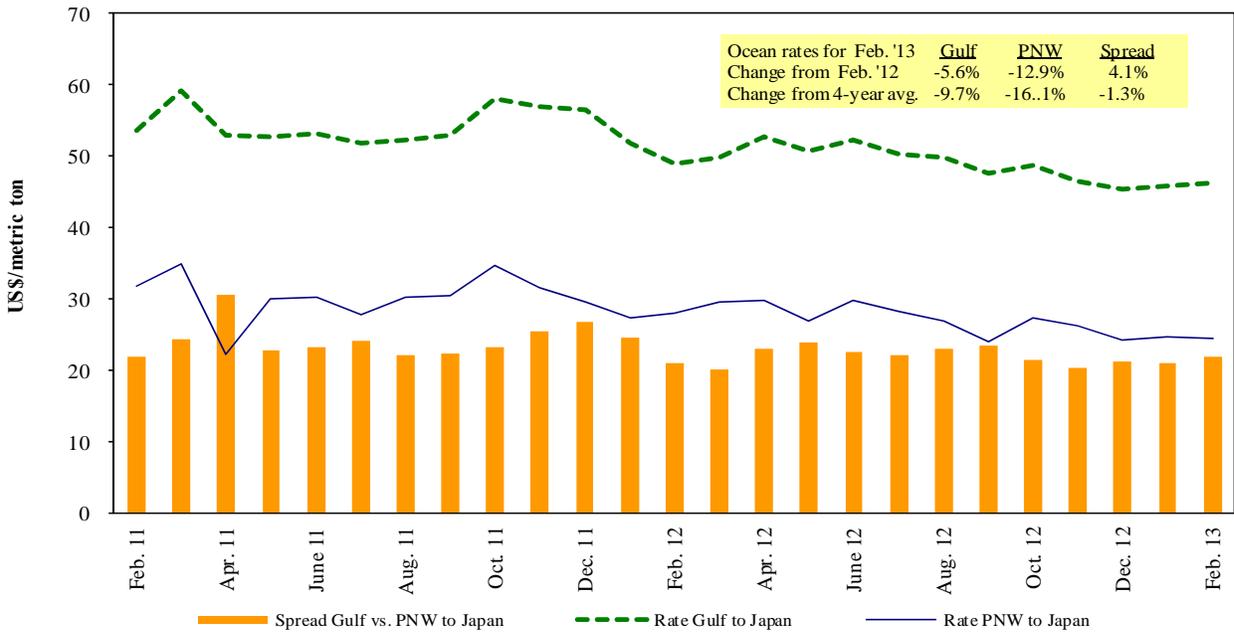
Figure 16
U.S. Gulf^d Vessel Loading Activity



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 03/23/2013

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/Feb5	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

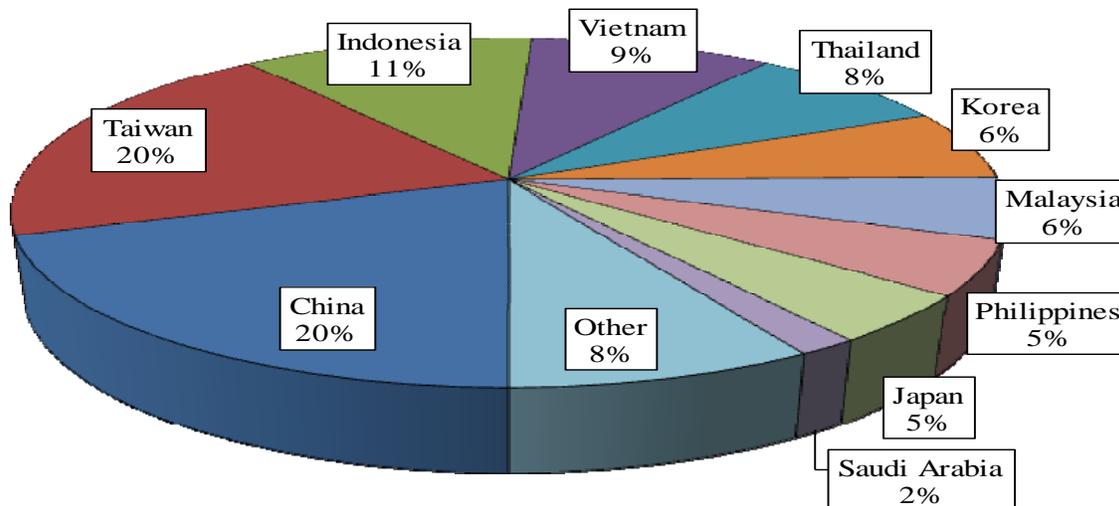
¹50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

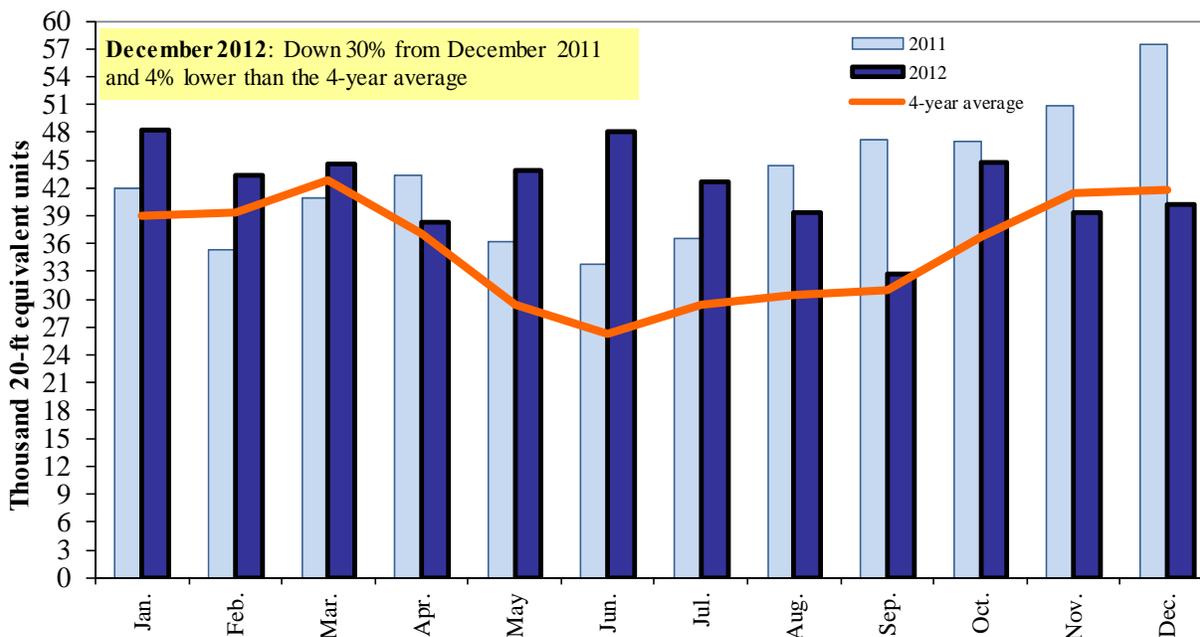


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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