USDA United States Department of Agriculture

Grain Transportation Report

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

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April 9, 2015

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WEEKLY HIGHLIGHTS

West Coast Labor Contract Moves on to the Next Stage, and…
On Friday, April 3, the International Longshore and Warehouse Union (ILWU) announced that 78 percent of the 90 Caucus delegates voted to recommend the ILWU membership support the proposed agreement that was approved on February 20 by the ILWU's 16-member elected Negotiating Committee and 8-member Safety Sub-committee. Copies of the agreement will be mailed to union members who will then have a chance to discuss the proposal at local union meetings. A secret ballot membership ratification vote will be the final step in the process and a final tally will be conducted on May 22. The contract covers 20,000 dockworkers at 29 West Coast ports.

…Vessel Backlog Decreases Significantly
As of this morning, at 9:30 am EDT, the U.S. Department of Transportation's Maritime Administration reported a total of 45 container ships in Southern California ports, with 9 container ships anchored and awaiting dock service and 36 ships receiving dock service, and no ships waiting offshore. Other West Coast ports reported no backlog. The current backlog is much lower than the peak of 131 container ships at all West Coast ports just prior to the approval of the agreement on February 20, when 78 vessels were in anchorage or offshore areas awaiting dock service and 53 ships were waiting or receiving service at dock.

Labor Disruption Causes New Traffic Pattern and Railroad Surcharge for Containers
On March 23, Norfolk Southern Railway instituted a $500 surcharge on each container interchanged with Union Pacific Railroad in order to ensure sufficient capacity for its customers originating loads along the East Coast. The surcharge is a result of the West Coast labor disruptions, which led to a large rebalancing of import traffic from the West Coast to the East Coast in order to avoid congestion. No end date for the surcharge has been announced.

First Quarter Gulf Vessel Loading Activity Strong
Although slower than last year, loading activity of ocean-going grain vessels in the U.S. Gulf was stronger compared to the 3-year average. During the 1st quarter of 2015, the average number of vessels loaded per week was 39, which is 11 percent below last year, but 5 percent above the 3-year average. A weekly average of 60 vessels loaded is expected in the next 10 days, 20 percent below the previous year, but 7 percent more than the 3-year average. Additionally, vessels waiting or queuing to be loaded were 47 percent lower than last year and 10 percent below the 3-year average.

Snapshots by Sector

Export Sales
During the week ending March 26, **unshipped balances** of wheat, corn, and soybeans totaled 23.9 mmt, 14 percent lower than at the same time last year. **Corn export sales** reached 0.407 mmt, down 7 percent and **wheat export sales** of 0.162 mmt, increased 58 percent from the previous week. **Soybean export sales** of 0.027 mmt decreased 95 percent from the previous week.

Rail
U.S. railroads originated 22,776 **carloads of grain** during the week ending March 28, down 5 percent from last week, up 3 percent from last year, and 15 percent higher than the 3-year average.

During the week ending April 2, average April shuttle **secondary railcar bids/offers per car** were $50 below tariff, up $16 from last week and $1,984 lower than last year. Non-shuttle secondary railcar bids/offers were $88 below tariff, down $6 from last week and $1,413 lower than last year.

Barge
During the week ending April 4, **barge grain movements** totaled 703,341 tons—13 percent higher than the previous week and 11 percent higher than the same period last year.

During the week ending April 4, 445 grain barges **moved down river**, up 16 percent from last week; 451 grain barges were **unloaded in New Orleans**, down 28 percent from the previous week.

Ocean
During the week ending April 2, 32 **ocean-going grain vessels** were loaded in the Gulf, 20 percent less than the same period last year. Fifty-three vessels are expected to be loaded within the next 10 days, 15 percent less than the same period last year.

During the week ending April 3, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $31 per mt, 3 percent less than the previous week. The cost of shipping from the PNW to Japan was $17 per mt, down 6 percent from the previous week.

Fuel
During the week April 6, U.S. **diesel fuel prices** averaged $2.78 per gallon, 4 cents lower than the previous week. They were down $1.18 from the same week last year.

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Feature Article/Calendar

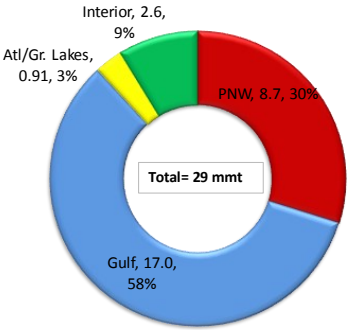
First Quarter Grain Export Inspections Decrease

In 2015, first quarter grain (corn, wheat, and soybeans) inspected for export from all U.S. ports totaled 29 million metric tons (mmt), down 9 percent from the same time last year and 1 percent below the 5-year average, according to data from the Grain Inspection, Packers and Stockyards Administration (GIPSA) (*see figure 1*). Inspections of corn for export decreased as worldwide production and export competition increased from last year. Soybean inspections during the first quarter were also below last year's record, as shipments to Asia decreased 14 percent. Wheat inspected for export decreased due to increased global competition and a stronger U.S. dollar. According to the GIPSA data, the Gulf's share of total grain exports decreased from last year, but the Pacific Northwest (PNW)'s share increased as rail service improved (*see figures 1 and 2)*. PNW first quarter grain were inspections the highest since 2008.

Gulf Inspections

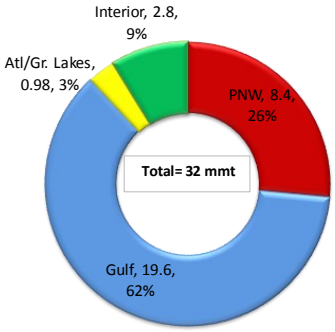
First quarter grain inspections at all Gulf ports reached 17 mmt, down 14 percent from last year and 4 percent below the 5-year average. The Gulf's share of total first quarter grain inspections slipped to 58 percent, compared to 62 percent last year (*see figures 1and 2*). First quarter Gulf grain exports increased to Asia and Latin America. Gulf rail deliveries of grain to port in the first quarter decreased 29 percent from last year (*see GTR, 04/02/15, Table 3*). Barge movements of grain through the Mississippi River Locks were down 10 percent from last year.

Figure 1: Grain Inspections by Port Region - 1st Qtr 2015



Source: USDA/GIPSA

Figure 2: Grain Inspections by Port Region - 1st Qtr 2014



PNW Inspections

PNW grain inspections in the first quarter totaled 8.7 mmt, up 3 percent from last year and 8 percent above the 5-year average. The PNW's share of total first quarter grain inspections was 30 percent, compared to 26 percent last year (*see figures 1 and 2*). PNW grain shipments to Asia were up 4 percent from last year. PNW soybean inspections were down from last year, but corn inspections increased significantly. Japan, Korea, and Taiwan accounted for most of the PNW's corn inspections. First quarter rail deliveries of grain to PNW ports were up 9 percent from last year (*see GTR, 04/02/15, Table 3*).

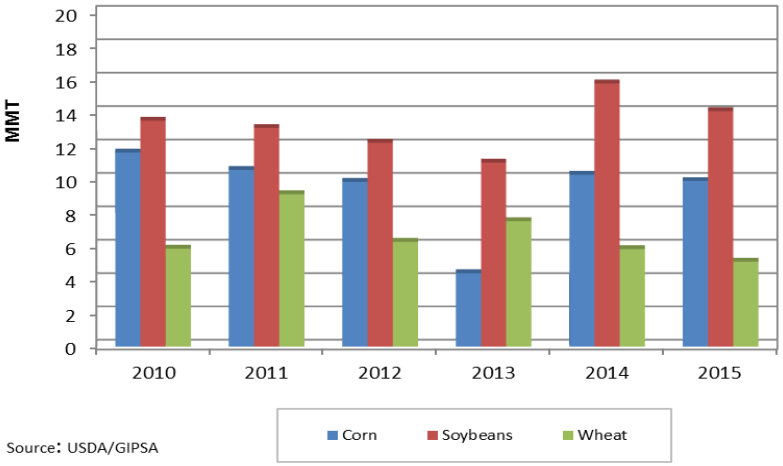
Atlantic and Great Lakes Inspections

Atlantic and Great Lakes grain inspections in the first quarter decreased 8 percent from last year to 0.910 mmt, despite a large increase in wheat inspections. Inspections of grain in the Atlantic and Great Lakes were 19 percent above the 5-year average, and were the third highest since 1995 (0.999 mmt). Wheat inspections jumped 159 percent as shipments to Asia and Latin America rebounded. Corn inspections decreased 42 percent from last year as shipments to the Caribbean decreased. Soybean inspections dropped 14 percent in these port regions, compared to last year at this time.

Interior Inspections
First quarter Interior inspections of grain reached 2.5 mmt, down 10 percent from last year and 8 percent below the 5-year average. The decrease in Interior grain inspections was caused primarily by a 22 percent drop in inspections of soybeans. Shipments of soybeans declined to Asia and Mexico. In the first quarter, corn inspected for export from the Interior, which is shipped mainly to Mexico, wase mostly unchanged from last year. Wheat inspections increased 3 percent from last year, as shipments from the Interior to Mexico increased.

Soybean Inspections
First quarter soybean inspections totaled 14 mmt, down 11 percent from last year but 7 percent above the 5-year average (*see figure 3*). U.S. soybean shipments to China decreased 18 percent during the first quarter 2014 and accounted for 56 percent of total U.S. soybean exports. Gulf soybean inspections (8.8 mmt) decreased 7 percent from last year but were 10 percent above the 5-year average. PNW soybean inspections (3.6 mmt) decreased 15 percent from last year and 3 percent above the 5-year average.

Figure 3: First Quarter Grain Inspections by Types



Source: USDA/GIPSA

Corn Inspections
First quarter corn inspections reached 9.9 mmt), down 4 percent from last year, but were 6 percent above the 5-year average; despite drought reduced supplies in 2012 (*see figure 3*). Corn inspections in the first quarter decreased 15 percent from last year in the Gulf, but increased 57 percent in the PNW as demand from Asia increased. Although current U.S. corn supplies are ample, increased worldwide corn production and amplified export competition caused demand for U.S. corn to recede.

Wheat Inspections
Wheat inspections in the first quarter reached 5.1 mmt, down 13 percent from last year and 26 percent below the 5-year average (*see figure 3*). U.S. wheat shipments decreased as export competition increased and demand from Latin America and Africa decreased. Wheat shipments to Asia were also down, but not as much.

Market Outlook
In its March forecast, USDA projects corn exports for the 2014/15 marketing year to increase 3 percent from its February estimate, but still fall 6 percent below last year. Wheat export projections are unchanged from February, but remain 23 percent below last year. The forecast for 2014/15 soybean exports is unchanged from last month and is 9 percent higher than last year's record. Soybean export sales reports are in line with projections, indicating stronger soybean transportation demand for rail and barge services so far this year compared to last year. Marketing year-to-date cumulative shipped export sales of soybeans are above last year, but wheat and corn sales are below last year (*see GTR Table 12*).
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Grain Transportation Indicators

Table 1
Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
Week ending		Unit Train	Shuttle		Gulf	Pacific
04/08/15	187	241	203	244	139	121
04/01/15	190	241	202	235	143	128

[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

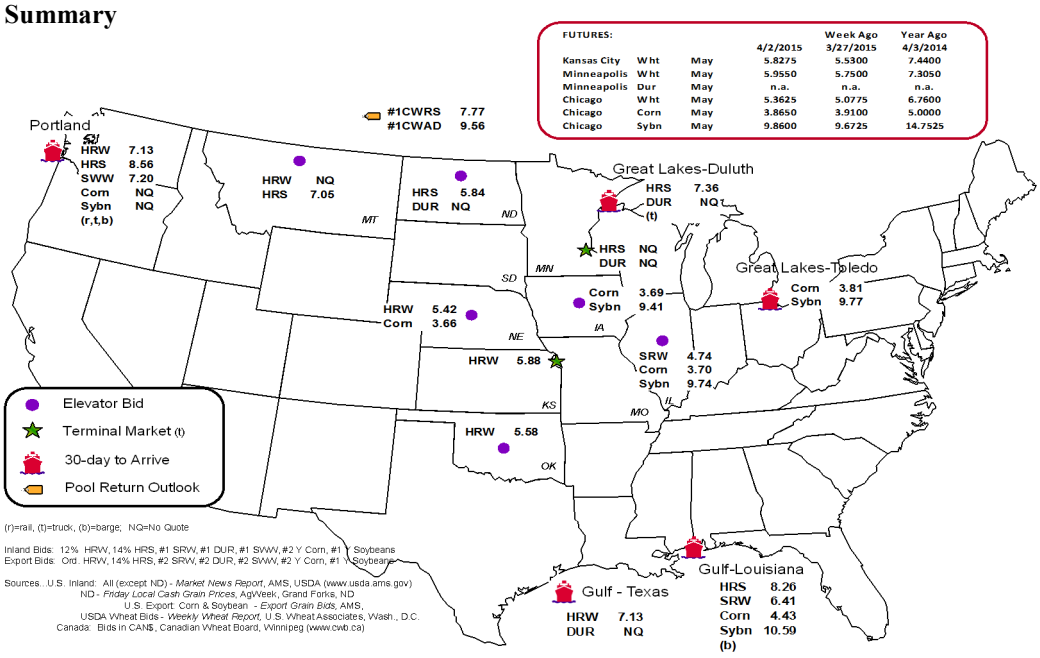
Table 2
Market Update: U.S. Origins to Export Position Price Spreads ($/bushel)

Commodity	Origin--Destination	4/2/2015	3/27/2015
Corn	IL--Gulf	-0.73	-0.78
Corn	NE--Gulf	-0.77	-0.84
Soybean	IA--Gulf	-1.18	-1.29
HRW	KS--Gulf	-1.25	-1.30
HRS	ND--Portland	-2.72	-2.58

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]
4/01/2015[p]	304	1,611	6,535	376	8,826	3/28/2015	1,636
3/25/2015[r]	320	1,209	6,955	482	8,966	3/21/2015	1,540
2015 YTD[r]	9,037	16,310	74,593	9,638	109,578	2015 YTD	20,803
2014 YTD[r]	15,111	20,133	68,027	11,251	114,522	2014 YTD	22,310
2015 YTD as % of 2014 YTD	60	81	110	86	96	% change YTD	93
Last 4 weeks as % of 2014[2]	43	111	131	58	109	Last 4wks % 2014	96
Last 4 weeks as % of 4-year avg.[2]	69	104	144	86	124	Last 4wks % 4 yr	95
Total 2014	44,621	83,674	256,670	32,107	417,072	Total 2014	96,467
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	71,397

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2013 and prior 4-year average.

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

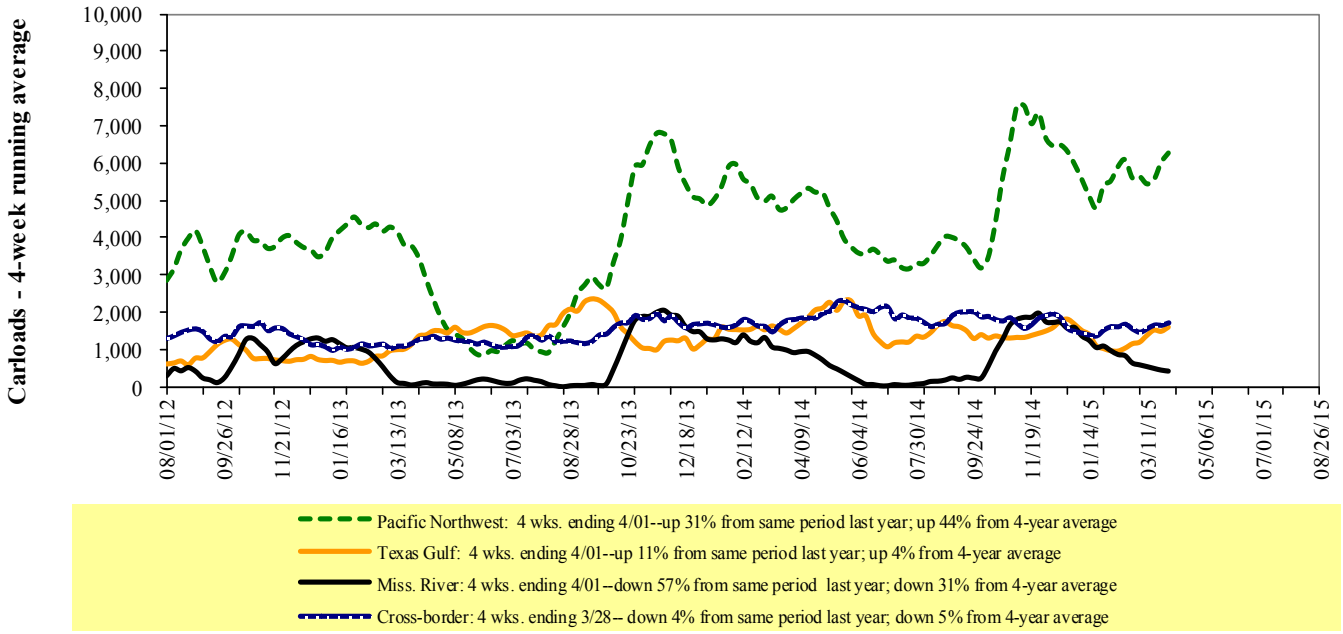
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)

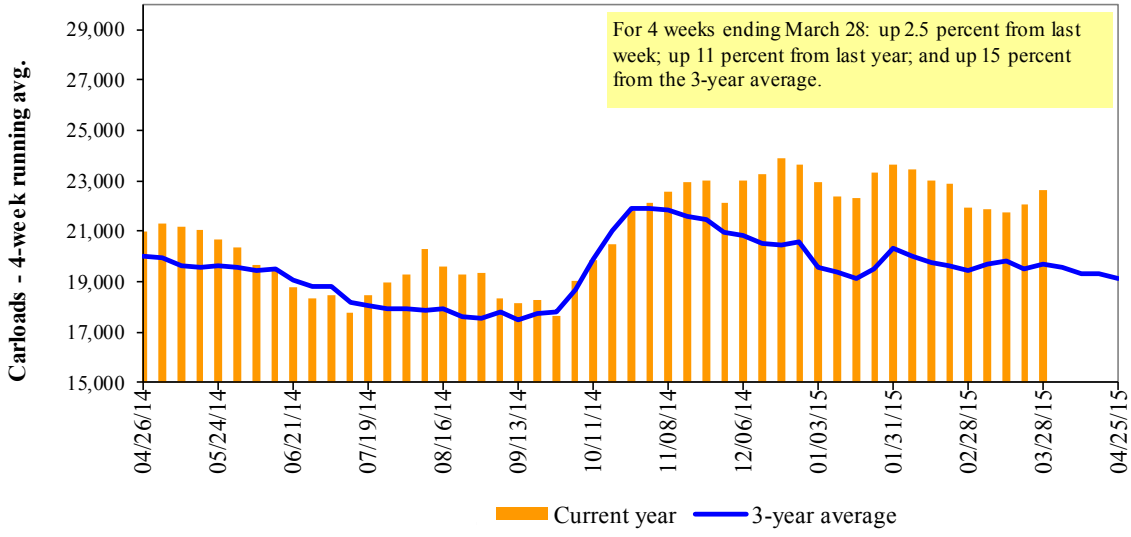
Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
03/28/15	2,159	3,358	11,128	1,054	5,077	22,776	3,191	4,539
This week last year	2,231	3,310	9,490	1,103	5,936	22,070	5,053	6,045
2015 YTD	25,969	36,762	132,579	10,255	67,414	272,979	48,899	52,056
2014 YTD	24,202	35,938	104,225	11,768	70,258	246,391	47,826	57,303
2015 YTD as % of 2014 YTD	107	102	127	87	96	111	102	91
Last 4 weeks as % of 2014[1]	105	101	137	108	92	114	99	98
Last 4 weeks as % of 3-yr avg.[2]	109	113	120	155	107	116	112	88
Total 2014	103,331	153,771	482,431	47,510	297,969	1,085,012	242,616	276,322

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

[2]The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date.

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							
4/2/2015	Apr-15	Apr-14	May-15	May-14	Jun-15	Jun-14	Jul-15	Jul-14
BNSF[3]								
COT grain units	no offer	no offer	no bids	no offer	no bids	no offer	1	no offer
COT grain single-car[5]	0 . . 20	no offer	0	no offer	40	no offer	78	no offer
UP[4]								
GCAS/Region 1	no bids	no offer	no bids	no offer	no bids	no offer	n/a	n/a
GCAS/Region 2	no bids	no offer	no bids	no offer	no bids	412	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.

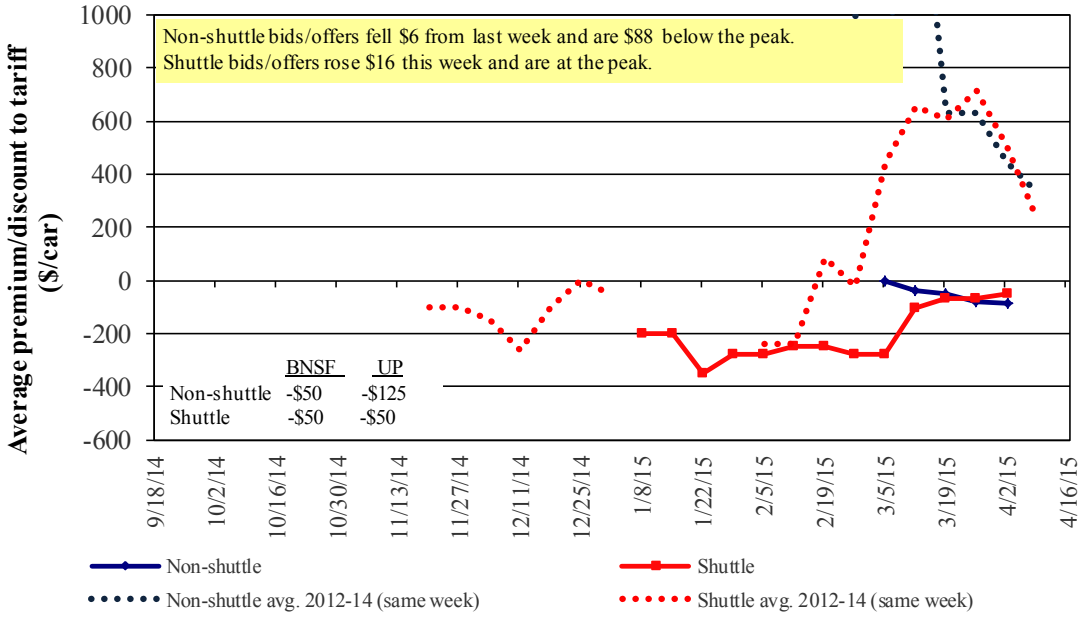
[5]Range is shown because average is not available. Not available = n/a.

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 2015, Secondary Market

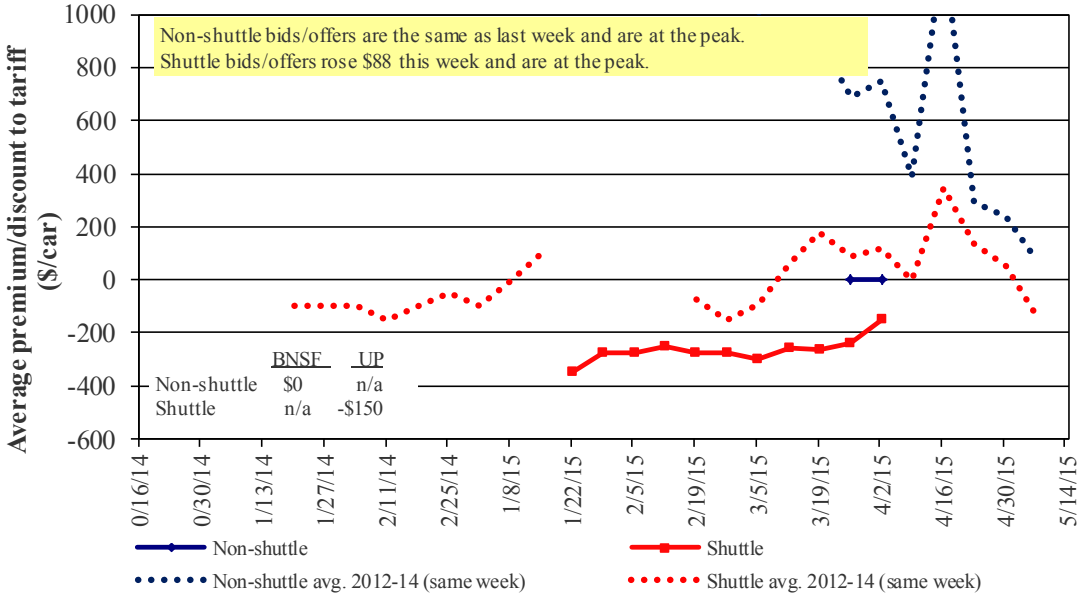


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in May 2015, Secondary Market

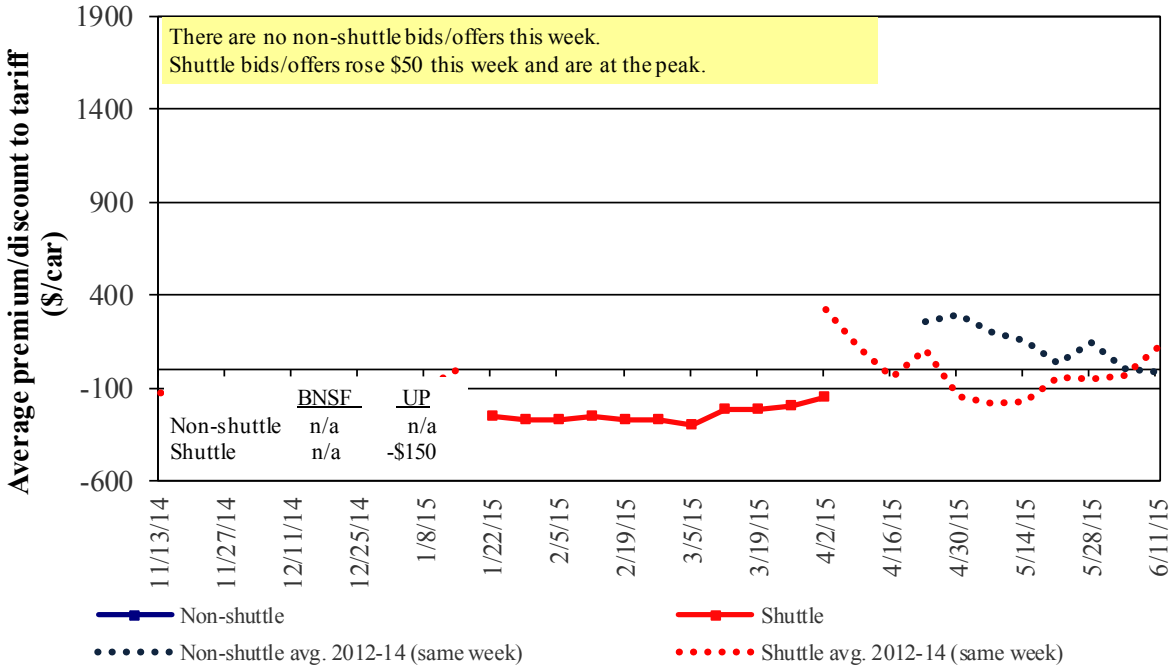


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in June 2015, 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					
4/2/2015	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15
Non-shuttle						
BNSF-GF	(50)	-	n/a	n/a	n/a	n/a
Change from last week	(12)	-	n/a	n/a	n/a	n/a
Change from same week 2014	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	(125)	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 2014	(1,450)	n/a	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	(50)	n/a	n/a	(63)	n/a	n/a
Change from last week	(25)	n/a	n/a	(25)	n/a	n/a
Change from same week 2014	(2,517)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(50)	(150)	(150)	(150)	(150)	n/a
Change from last week	56	88	50	50	50	n/a
Change from same week 2014	(1,450)	(1,050)	(1,000)	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.

The **tariff rail rate** is the base price of freight rail service, and together with **fuel surcharges** and any **auction and secondary rail** values constitute the full cost of shipping by rail. Typically, auction and secondary rail values are a small fraction of the full cost of shipping by rail relative to the tariff rate. High auction and secondary rail values, during times of high rail demand or short supply, can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

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

Effective date: 4/1/2015	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	$3,387	$81	$34.44	$0.94	3
	Grand Forks, ND	Duluth-Superior, MN	$3,596	$27	$35.98	$0.98	-2
	Wichita, KS	Los Angeles, CA	$6,244	$138	$63.37	$1.72	-7
	Wichita, KS	New Orleans, LA	$4,026	$142	$41.39	$1.13	1
	Sioux Falls, SD	Galveston-Houston, TX	$5,824	$113	$58.96	$1.60	-6
	Northwest KS	Galveston-Houston, TX	$4,293	$156	$44.18	$1.20	0
	Amarillo, TX	Los Angeles, CA	$4,492	$217	$46.76	$1.27	-2
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,328	$161	$34.65	$0.88	-2
	Toledo, OH	Raleigh, NC	$5,555	$191	$57.06	$1.45	12
	Des Moines, IA	Davenport, IA	$2,168	$34	$21.87	$0.56	2
	Indianapolis, IN	Atlanta, GA	$4,761	$143	$48.70	$1.24	12
	Indianapolis, IN	Knoxville, TN	$4,104	$92	$41.67	$1.06	14
	Des Moines, IA	Little Rock, AR	$3,308	$100	$33.84	$0.86	-1
	Des Moines, IA	Los Angeles, CA	$4,852	$292	$51.08	$1.30	-13
Soybeans	Minneapolis, MN	New Orleans, LA	$3,664	$142	$37.79	$1.03	-1
	Toledo, OH	Huntsville, AL	$4,676	$135	$47.78	$1.30	20
	Indianapolis, IN	Raleigh, NC	$5,625	$192	$57.76	$1.57	12
	Indianapolis, IN	Huntsville, AL	$4,368	$92	$44.29	$1.21	24
	Champaign-Urbana, IL	New Orleans, LA	$3,974	$161	$41.06	$1.12	0
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,678	$79	$37.31	$1.02	-6
	Wichita, KS	Galveston-Houston, TX	$3,471	$62	$35.08	$0.95	-13
	Chicago, IL	Albany, NY	$4,723	$179	$48.68	$1.32	13
	Grand Forks, ND	Portland, OR	$5,159	$137	$52.59	$1.43	-8
	Grand Forks, ND	Galveston-Houston, TX	$6,084	$142	$61.83	$1.68	-7
	Northwest KS	Portland, OR	$5,260	$256	$54.77	$1.49	-2
Corn	Minneapolis, MN	Portland, OR	$5,000	$167	$51.31	$1.30	-9
	Sioux Falls, SD	Tacoma, WA	$4,960	$153	$50.77	$1.29	-9
	Champaign-Urbana, IL	New Orleans, LA	$3,147	$161	$32.85	$0.83	-3
	Lincoln, NE	Galveston-Houston, TX	$3,510	$89	$35.74	$0.91	-7
	Des Moines, IA	Amarillo, TX	$3,690	$126	$37.89	$0.96	-2
	Minneapolis, MN	Tacoma, WA	$5,000	$165	$51.29	$1.30	-9
	Council Bluffs, IA	Stockton, CA	$4,400	$171	$45.39	$1.15	-11
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,520	$153	$56.33	$1.53	-8
	Minneapolis, MN	Portland, OR	$5,530	$167	$56.57	$1.54	-9
	Fargo, ND	Tacoma, WA	$5,430	$136	$55.27	$1.50	-7
	Council Bluffs, IA	New Orleans, LA	$4,425	$186	$45.79	$1.25	0
	Toledo, OH	Huntsville, AL	$3,851	$135	$39.59	$1.08	26
	Grand Island, NE	Portland, OR	$5,360	$262	$55.83	$1.52	-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: 4/1/2015							
				Fuel	Tariff plus surcharge per:		Percent
Commodity	Origin state	Destination region	Tariff rate/car[1]	surcharge per car[2]	metric ton[3]	bushel[3]	change Y/Y[4]
Wheat	MT	Chihuahua, CI	$6,960	$145	$72.59	$1.97	2
	OK	Cuautitlan, EM	$6,565	$176	$68.87	$1.87	-2
	KS	Guadalajara, JA	$7,010	$170	$73.36	$1.99	-4
	TX	Salinas Victoria, NL	$3,885	$66	$40.38	$1.10	0
Corn	IA	Guadalajara, JA	$8,349	$200	$87.34	$2.22	-3
	SD	Celaya, GJ	$7,656	$189	$80.16	$2.03	-7
	NE	Queretaro, QA	$7,568	$177	$79.14	$2.01	-4
	SD	Salinas Victoria, NL	$5,880	$144	$61.55	$1.56	-7
	MO	Tlalnepantla, EM	$6,920	$172	$72.47	$1.84	-5
	SD	Torreon, CU	$6,922	$159	$72.35	$1.84	-4
Soybeans	MO	Bojay (Tula), HG	$8,311	$168	$86.64	$2.36	-1
	NE	Guadalajara, JA	$8,872	$193	$92.61	$2.52	-2
	IA	El Castillo, JA	$9,155	$188	$95.47	$2.60	-3
	KS	Torreon, CU	$7,189	$120	$74.67	$2.03	-1
Sorghum	TX	Guadalajara, JA	$7,253	$123	$75.37	$1.91	-1
	NE	Celaya, GJ	$7,287	$172	$76.21	$1.93	-6
	KS	Queretaro, QA	$6,845	$108	$71.04	$1.80	-2
	NE	Salinas Victoria, NL	$5,550	$126	$58.00	$1.47	-4
	NE	Torreon, CU	$6,518	$141	$68.04	$1.73	-3

[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

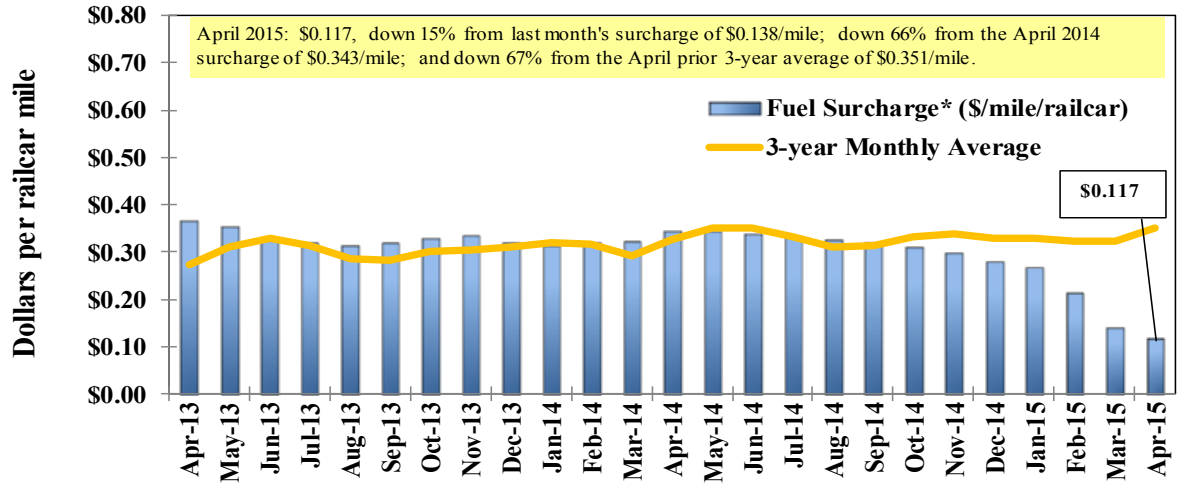
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[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.

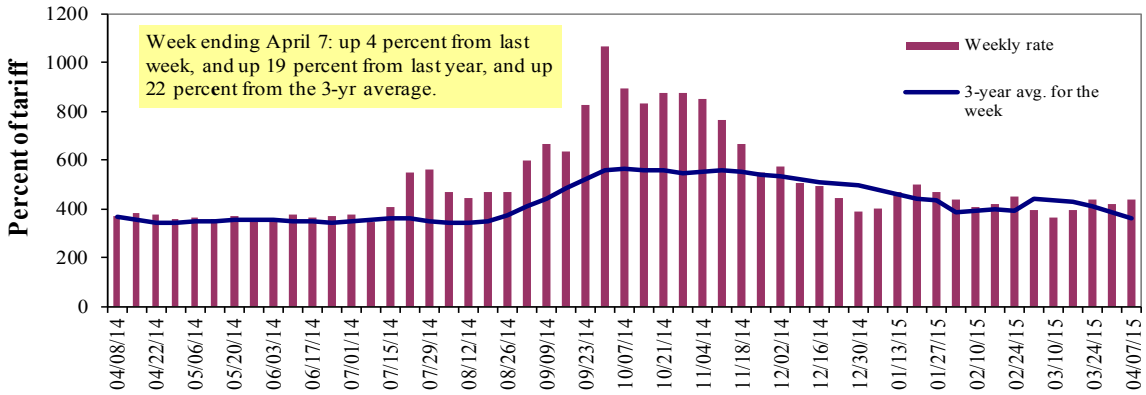
** BNSF strike price (diesel price when fuel surcharges begin) changed from $1.25/gal. to $2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was $0.227/mile instead of $0.331/mile.

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]	4/7/2015	443	438	440	345	358	358	300
	3/31/2015	440	413	423	343	355	355	310
$/ton	4/7/2015	27.42	23.30	20.42	13.77	16.79	14.46	9.42
	3/31/2015	27.24	21.97	19.63	13.69	16.65	14.34	9.73
Current week % change from the same week:								
	Last year	-	12	19	37	15	15	35
	3-year avg. [2]	-	-	22	25	23	23	33
Rate[1]	May	408	368	348	270	280	280	250
	July	412	370	362	270	280	280	253

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9
Benchmark tariff rates

Calculating barge rate per ton:
(Rate * 1976 tariff benchmark rate per ton)/100

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

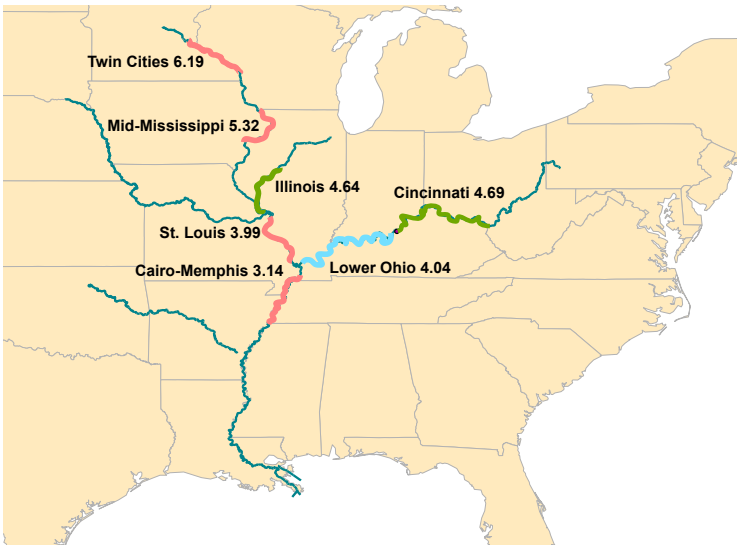
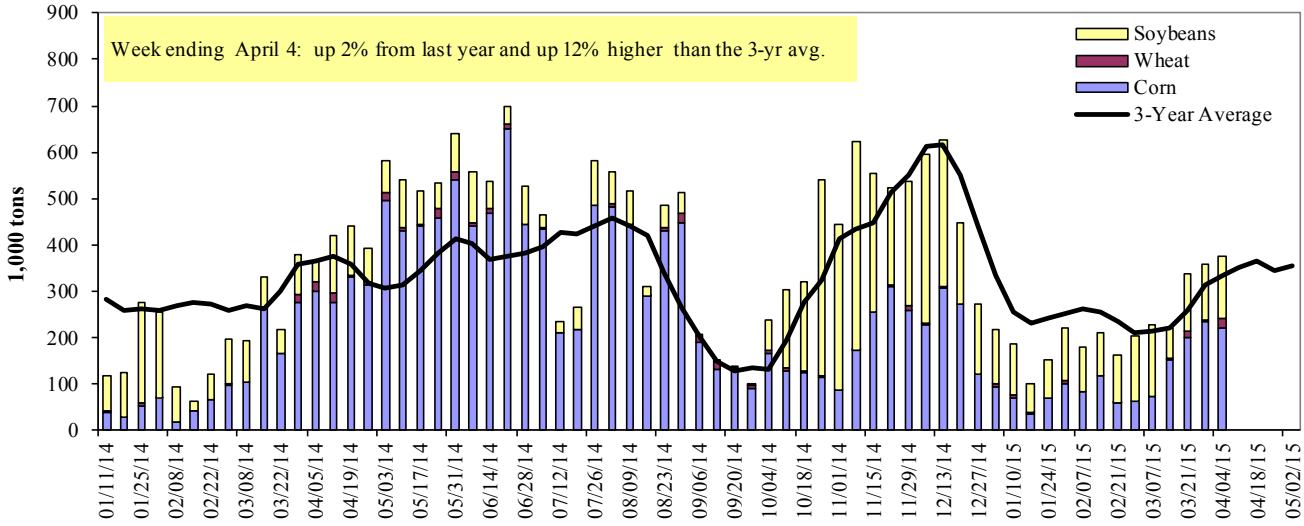


Figure 10

Barge Movements on the Mississippi 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 04/04/2015	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	20	0	39	0	59
Winfield, MO (L25)	99	2	107	2	210
Alton, IL (L26)	231	20	143	2	396
Granite City, IL (L27)	222	20	132	2	375
Illinois River (L8)	88	18	24	0	130
Ohio River (L52)	239	5	51	0	294
Arkansas River (L1)	3	15	13	3	34
Weekly total - 2015	463	40	195	4	703
Weekly total - 2014	492	66	76	1	635
2015 YTD[1]	3,687	300	3,258	62	7,307
2014 YTD	4,396	422	3,139	48	8,005
2015 as % of 2014 YTD	84	71	104	130	91
Last 4 weeks as % of 2014[2]	67	51	142	145	79
Total 2014	20,693	2,181	11,813	258	34,946

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

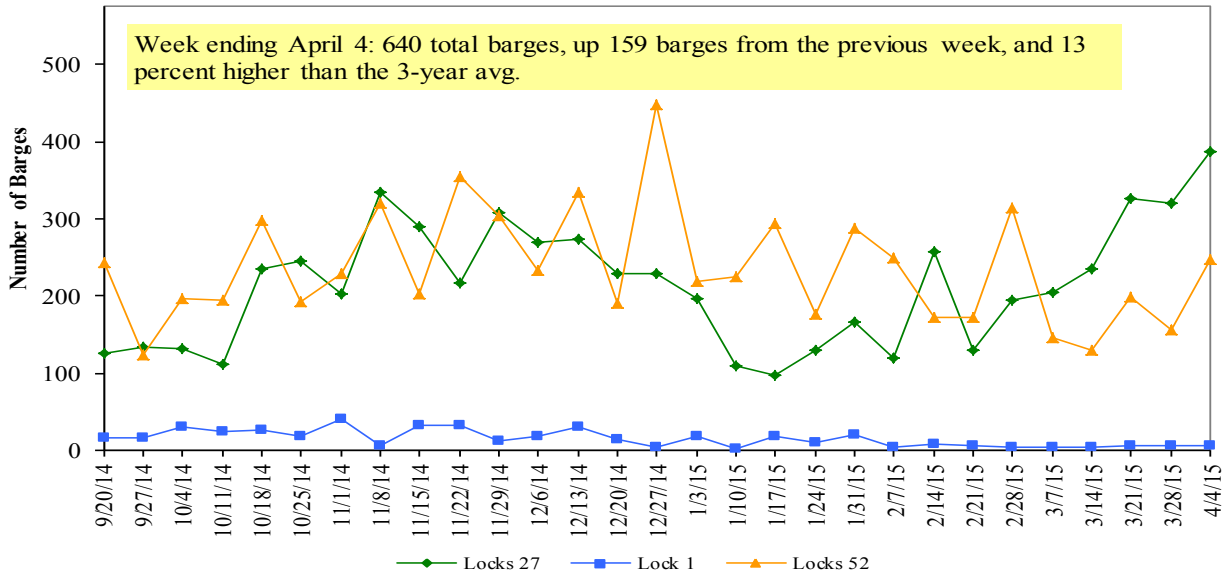
[2] As a percent of same period in 2014.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers

Figure 11

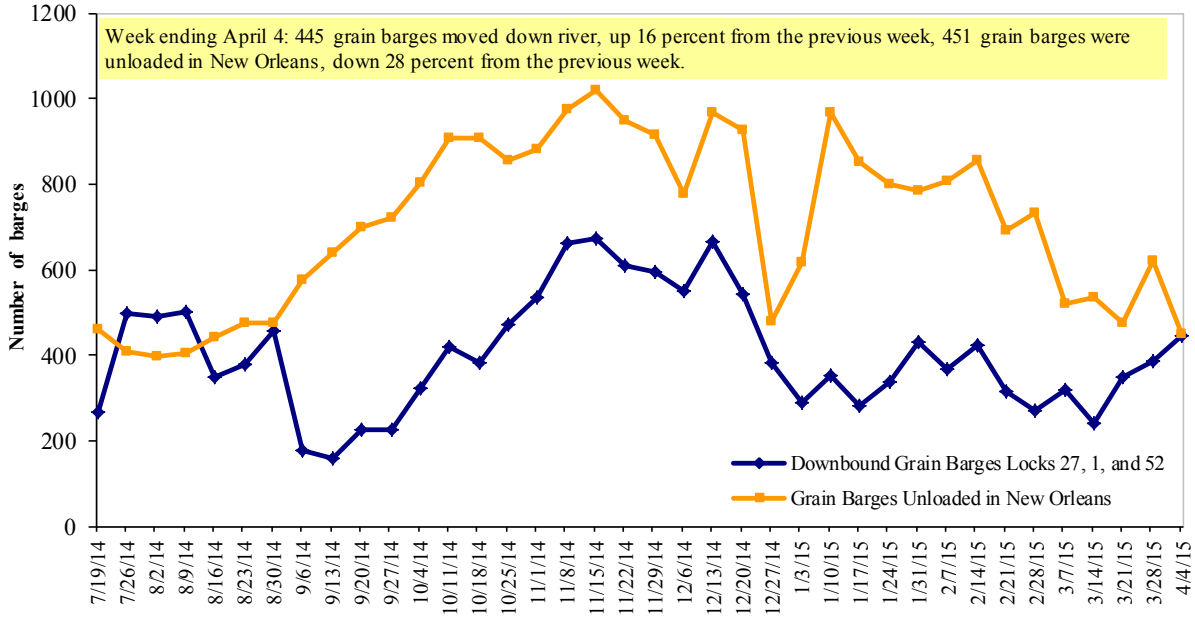
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



Source: U.S. Army Corps of Engineers

Figure 12

Grain Barges for Export in New Orleans Region



Source: U.S. Army Corps of Engineers and GIPSA

Truck Transportation

The **weekly diesel price** provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11

Retail on-Highway Diesel Prices[1], Week Ending 04/06/2014 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.950	-0.042	-1.125
	New England	3.114	-0.050	-1.126
	Central Atlantic	3.122	-0.057	-1.083
	Lower Atlantic	2.786	-0.029	-1.160
II	Midwest[2]	2.675	-0.052	-1.267
III	Gulf Coast[3]	2.643	-0.032	-1.150
IV	Rocky Mountain	2.725	-0.018	-1.230
V	West Coast	2.918	-0.027	-1.064
	West Coast less California	2.742	-0.016	-1.152
	California	3.061	-0.035	-0.995
Total	U.S.	2.784	-0.040	-1.175

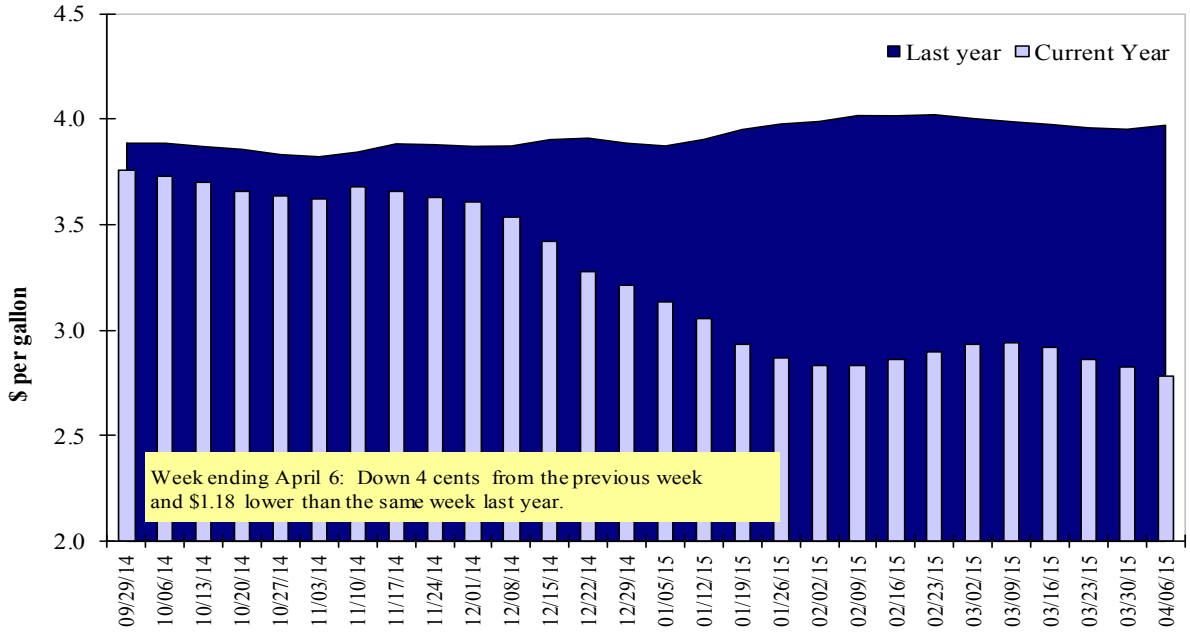
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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]									
3/26/2015	1,412	721	1,511	598	111	4,352	14,899	4,604	23,855
This week year ago	1,754	878	1,513	988	142	5,274	18,509	4,016	27,799
Cumulative exports-marketing year[2]									
2014/15 YTD	5,681	3,061	5,989	3,260	567	18,558	22,489	43,892	84,939
2013/14 YTD	9,637	6,583	5,041	3,375	344	24,979	22,744	40,495	88,218
YTD 2014/15 as % of 2013/14	59	46	119	97	165	74	99	108	96
Last 4 wks as % of same period 2013/14	89	82	110	66	86	89	84	132	92
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293

[1] Current unshipped export sales to date

[2] Shipped export sales to date; new marketing year in effect for corn and soybeans

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

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

Table 13

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

Week ending 03/26/2015	Total Commitments[2] 2014/15 Current MY	2013/14 Last MY	% change current MY from last MY	Exports[3] 3-year avg 2011-2013
	- 1,000 mt -			- 1,000 mt -
Japan	8,033	8,841	(9)	10,079
Mexico	9,037	9,270	(3)	8,145
Korea	2,396	2,594	(8)	2,965
Colombia	3,248	2,391	36	3,461
Taiwan	1,174	1,345	(13)	1,238
Top 5 Importers	**23,887**	**24,441**	**(2)**	**25,887**
Total US corn export sales	**37,389**	**40,999**	**(9)**	**34,445**
% of Projected	82%	84%		
Change from prior week	407	706		
Top 5 importers' share of U.S. corn export sales	64%	60%		75%
USDA forecast, March 2015	**45,720**	**48,700**	**(6)**	
Corn Use for Ethanol USDA forecast, March 2015	**132,080**	**130,404**	**1**	

(n) indicates negative number.

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

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

[3]FAS Marketing Year Ranking Reports - http://apps.fas.usda.gov/export-sales/myrkaug.htm; 3-yr average

Table 14

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

Week Ending 03/26/2015	Total Commitments[2] 2014/15 Current MY	2013/14 Last MY	% change current MY from last MY	Exports[3] 3-yr avg. 2011-13
	- 1,000 mt -			- 1,000 mt -
China	29,878	27,699	8	24,211
Mexico	2,862	2,935	(3)	2,971
Indonesia	1,518	1,897	(20)	1,895
Japan	1,525	1,652	(8)	1,750
Taiwan	1,113	1,055	5	1,055
Top 5 importers	**36,896**	**35,238**	**5**	**31,882**
Total US soybean export sales	**48,497**	**44,511**	**9**	**39,169**
% of Projected	100%	99%		
Change from prior week*	27	66		
Top 5 importers' share of U.S. soybean export sales	76%	79%		**81%**
USDA forecast, March 2015	**48,720**	**44,820**	**9**	

(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)

* Includes revisions to previous week's data.

Table 15

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

Week Ending 03/26/2015	Total Commitments[2] 2014/15 Current MY	2013/14 Last MY	% change current MY from last MY	Exports[3] 3-yr avg 2011-2013
	- 1,000 mt -			- 1,000 mt -
Japan	2,964	2,817	5	3,243
Mexico	2,701	2,879	(6)	3,066
Nigeria	1,906	2,689	(29)	2,960
Philippines	2,305	1,936	19	2,006
China	379	4,259	(91)	1,830
Brazil	1,534	3,956	(61)	1,617
Korea	1,208	1,217	(1)	1,552
Taiwan	983	950	4	969
Indonesia	635	950	(33)	813
Colombia	550	724	(24)	610
Top 10 importers	**15,164**	**22,376**	(32)	**18,665**
Total US wheat export sales	**22,910**	**30,253**	**(24)**	**27,696**
% of Projected	94%	95%		
Change from prior week*	162	336		
Top 10 importers' share of U.S. wheat export sales	66%	74%		67%
USDA forecast, March 2015	**24,490**	**32,010**	**(23)**	

(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 04/02/15	Previous Week[1]	Current Week as % of Previous	2015 YTD[1]	2014 YTD[1]	2015 YTD as % of 2014 YTD	Last 4-weeks as % of 2014	Last 4-weeks as % of 3-yr. avg.	Total[1] 2014
Pacific Northwest									
Wheat	159	158	101	3,057	2,861	107	73	82	12,436
Corn	328	248	132	2,496	1,379	181	224	199	7,781
Soybeans	209	311	67	3,787	4,190	90	83	104	12,887
Total	**696**	**717**	**97**	**9,341**	**8,430**	**111**	**105**	**117**	**33,104**
Mississippi Gulf									
Wheat	114	149	77	1,089	1,017	107	143	75	4,495
Corn	531	376	141	6,817	7,402	92	56	98	30,912
Soybeans	308	280	110	8,702	8,858	98	77	114	29,087
Total	**952**	**805**	**118**	**16,608**	**17,277**	**96**	**68**	**99**	**64,495**
Texas Gulf									
Wheat	84	16	523	880	1,568	56	81	77	6,120
Corn	0	23	0	175	143	122	167	90	580
Soybeans	0	0	n/a	182	254	72	n/a	0	949
Total	**84**	**39**	**217**	**1,237**	**1,965**	**63**	**86**	**78**	**7,649**
Interior									
Wheat	32	12	270	314	274	115	74	99	1,400
Corn	131	92	143	1,404	1,294	109	91	94	5,677
Soybeans	51	67	77	1,060	1,282	83	81	61	4,312
Total	**215**	**171**	**126**	**2,779**	**2,850**	**97**	**108**	**82**	**11,389**
Great Lakes									
Wheat	0	0	n/a	12	0	n/a	n/a	0	935
Corn	0	0	n/a	0	0	n/a	n/a	0	288
Soybeans	0	1	n/a	1	0	n/a	n/a	121	988
Total	**0**	**1**	**n/a**	**13**	**0**	**n/a**	**n/a**	**5**	**2,211**
Atlantic									
Wheat	1	5	12	137	44	310	560	174	553
Corn	9	10	85	23	33	70	150	115	816
Soybeans	13	27	50	760	905	84	37	62	2,119
Total	**23**	**42**	**54**	**921**	**983**	**94**	**74**	**94**	**3,487**
U.S. total from ports[2]									
Wheat	389	339	115	5,490	5,765	95	91	81	25,939
Corn	998	749	133	10,916	10,252	106	81	116	46,054
Soybeans	582	686	85	14,492	15,489	94	73	100	50,342
Total	**1,970**	**1,774**	**111**	**30,898**	**31,506**	**98**	**80**	**100**	**122,335**

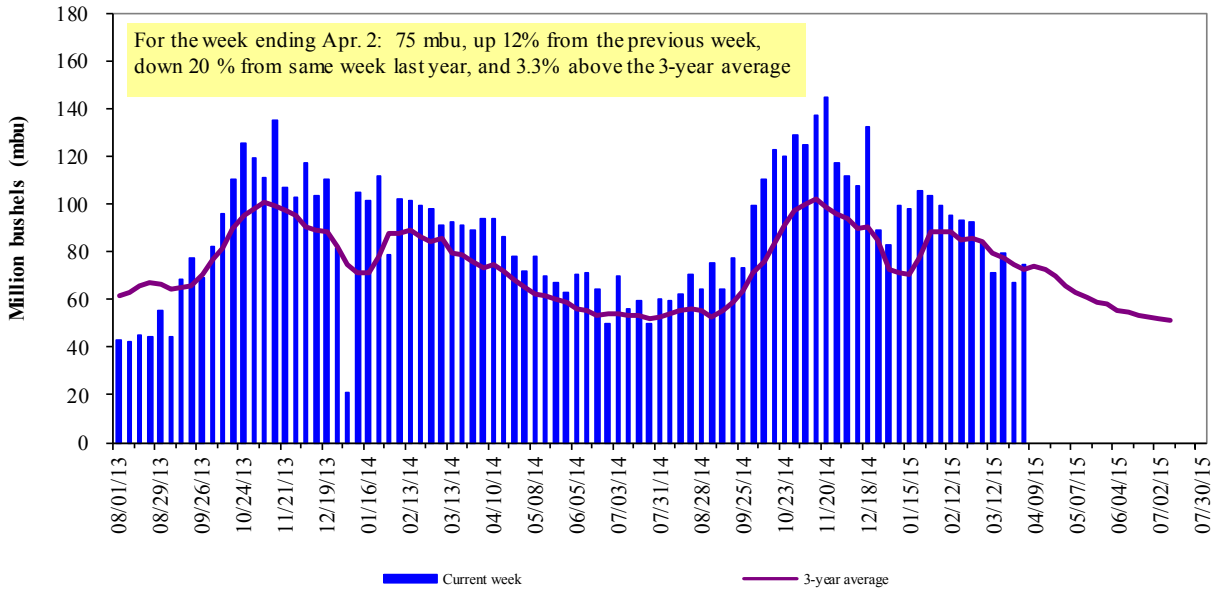
[1] Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); YTD= year-to-date; n/a = not applicable

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 59 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2014.

Figure 14

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

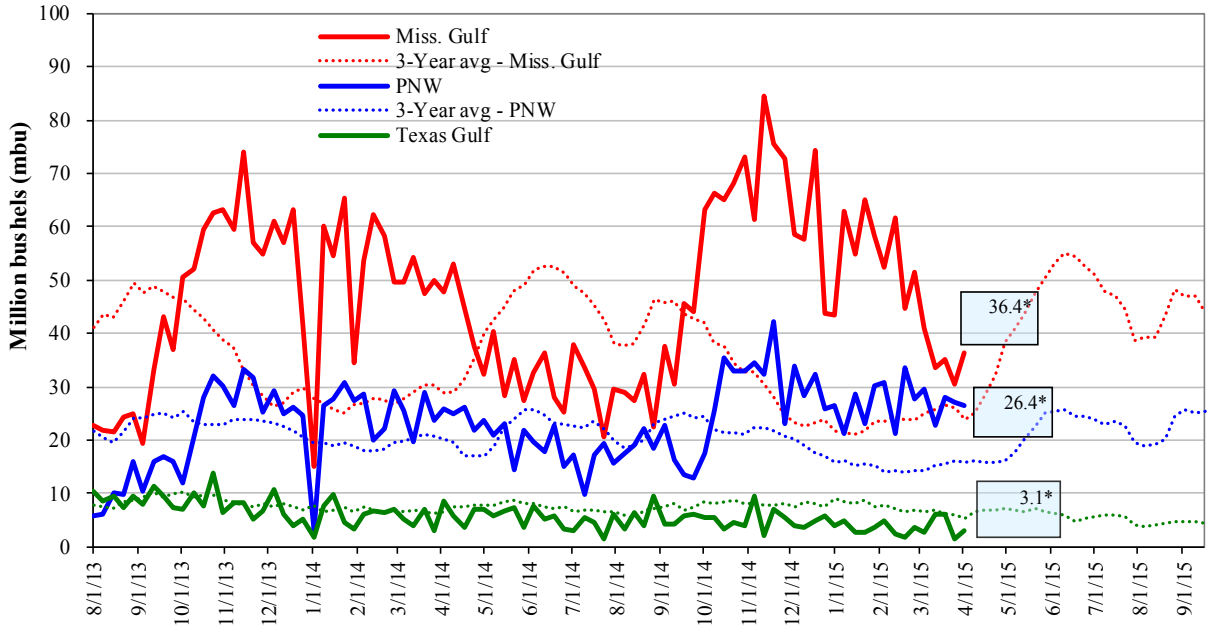


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

Apr. 2: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 19	up 108	up 23	down 2
Last year (same week)	down 24	down 64	down 30	up 2
3-yr avg. (4-wk mov. avg.	up 6	down 42	down 0.4	up 11

Ocean Transportation

Table 17

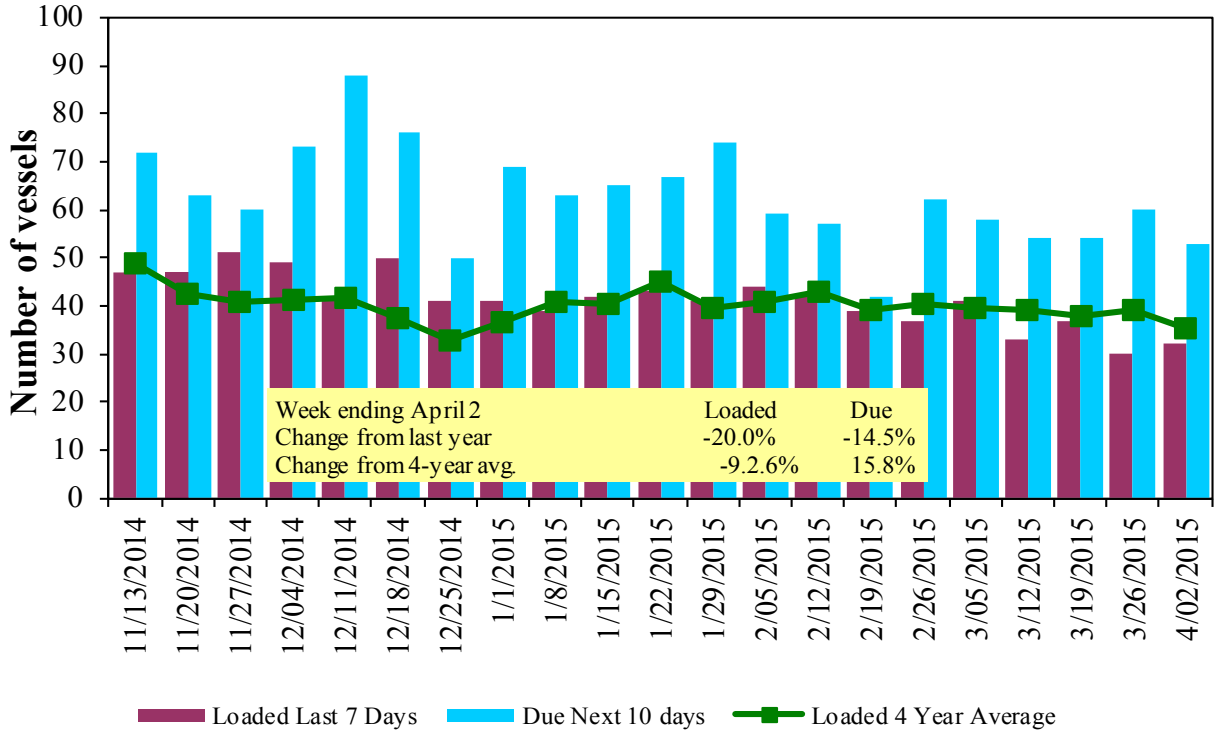
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
4/2/2015	47	32	53	14	n/a
3/26/2015	41	30	60	11	n/a
2014 range	(18..88)	(24..52)	(27..97)	(6..26)	n/a
2014 avg.	46	39	59	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

U.S. Gulf[1] Vessel Loading Activity

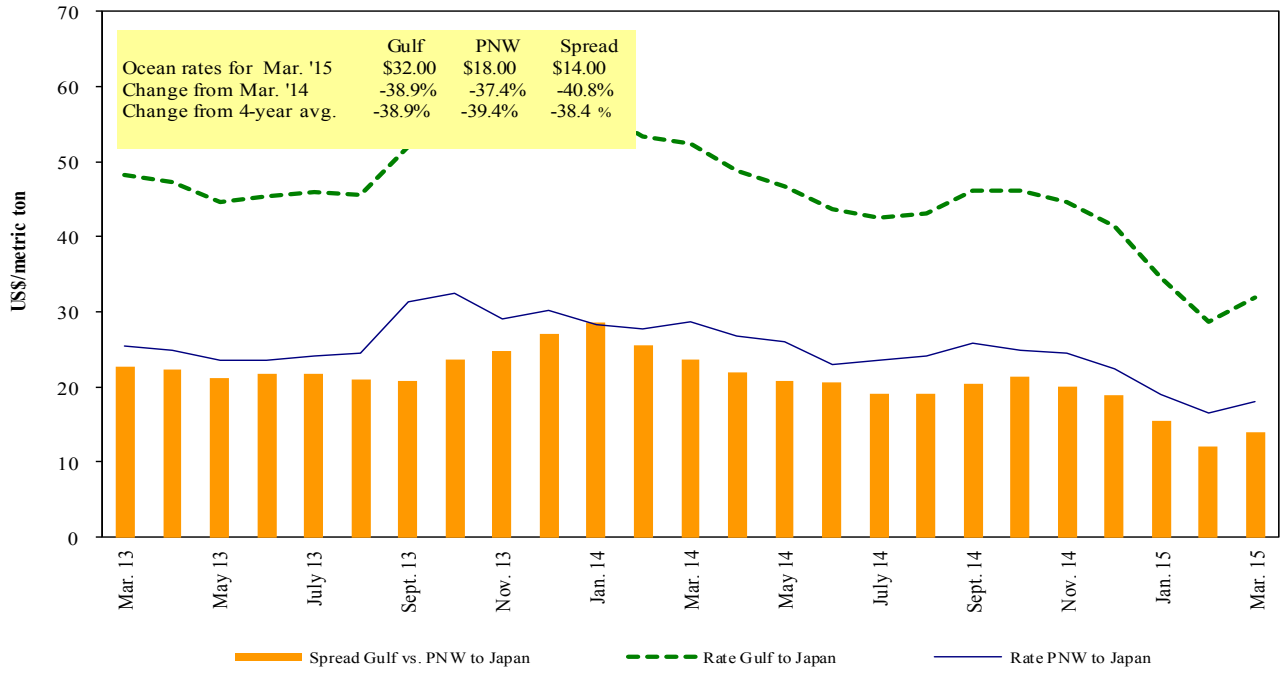


Source:Transportation & Marketing Programs/AMS/USDA

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

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 4/4/2015

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Apr 1/10	55,000	30.75
U.S. Gulf	China	Heavy Grain	Mar 5/14	58,000	30.75
U.S. Gulf	Cameroon[1]	Sorghum	Mar 16/26	7,960	136.16
U.S. Gulf	Djibouti[1]	Wheat	Apr 21/May 4	4,530	88.60
U.S. Gulf	Pt. Sudan[1]	Sorghum	Apr 17/25	47,500	82.75
PNW	China	Grain	Mar 16/25	60,000	15.25
Brazil	China	Heavy Grain	Jun 1/30	60,000	22.75
Brazil	China	Grain	Apr 15/May 31	60,000	24.50
Brazil	China	Heavy Grain	May 15/10	60,000	22.75
Brazil	China	Heavy Grain	May 1/10	60,000	23.00
Brazil	China	Heavy Grain	May 1/10	60,000	22.50
Brazil	China	Heavy Grain	Apr 10/20	60,000	23.50
Brazil	China	Heavy Grain	Mar 25/Apr 4	60,000	21.50
Brazil	China	Heavy Grain	Mar 17/26	60,000	21.00
Brazil	Vietnam	Heavy Grain	Mar 31/Apr 5	60,000	24.50
France	China	Barley	Apr 16/25	63,000	26.00
River Plate	Japan	Heavy Grain	Apr 6/15	43,000	34.50

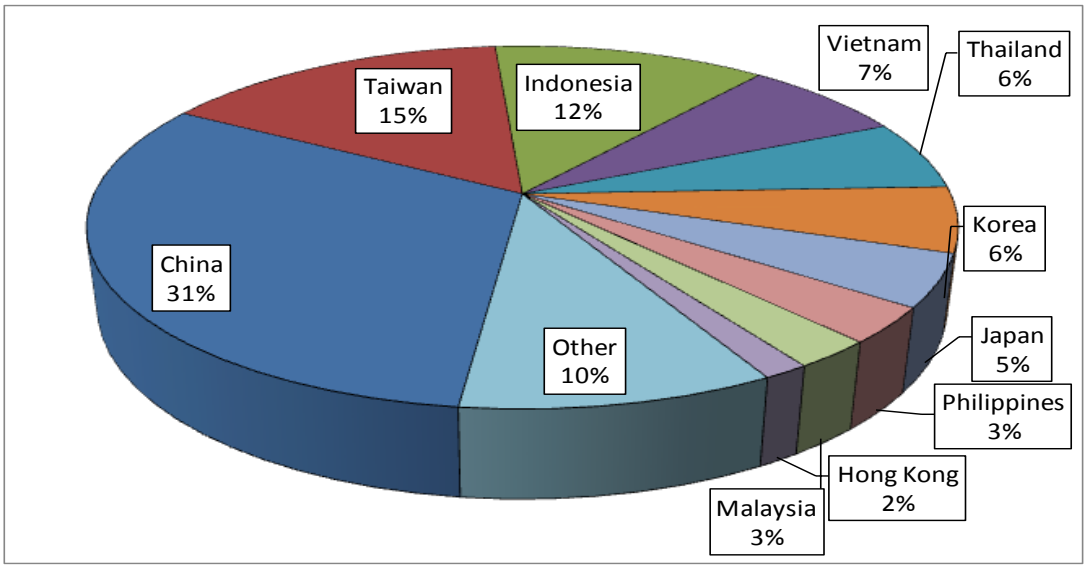
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

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

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

In 2013, containers were used to transport 10 percent of total U.S. waterborne grain exports, up 2 percentage points from 2012. Approximately 61 percent of U.S. waterborne grain exports in 2013 went to Asia, of which 16 percent were moved in containers. Asia is the top destination for U.S. containerized grain exports—97 percent in 2013.

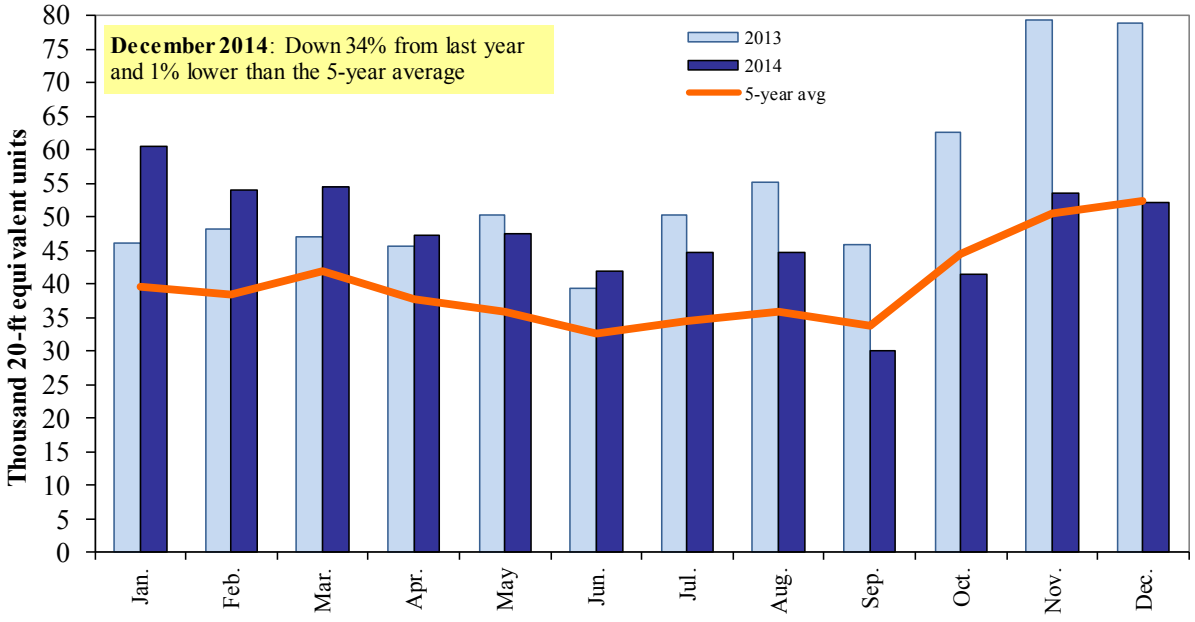
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-December 2014



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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