



# Grain Transportation Report

A weekly publication of the Transportation and Marketing Programs/Transportation Services Division  
[www.ams.usda.gov/GTR](http://www.ams.usda.gov/GTR)

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April 10, 2014

## WEEKLY HIGHLIGHTS

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### Wheat Inspections Rebound

For the week ending April 3, total inspections of wheat for export from all major port regions reached .639 million metric tons (mmt), up 25 percent from the past week and 23 percent greater than last year. Weekly wheat inspections increased in the Mississippi and Texas Gulf, bound primarily to Latin America and Africa. Total corn inspections (1.27 mmt) decreased 3 percent from the previous week and soybean inspections (.524 mmt) remained unchanged. Corn inspections, however, remained above the 4-week average as well as the 3-year average. Total inspections of grain (corn, wheat, and soybeans) reached 2.44 mmt, up 4 percent from the past week, up 65 percent from the same time last year, and 25 percent above the 3-year average. Outstanding (unshipped) export sales were down for corn, wheat, and soybeans.

### Barge Availability Continues to Increase as Navigation Improves on Upper Mississippi River

Navigation on the Upper Mississippi and Illinois rivers continues to improve as warmer temperatures have reduced ice accumulations that have limited or halted barge traffic during the coldest winter for six Midwestern States since 1978-1979. During the last 4 weeks (March 9 to April 5), an average of 374 empty barges per week have transited upbound at Mississippi River Locks 27 (near St. Louis, MO), a significant increase compared to January through early March, when upbound empties averaged 137 barges per week. For the week ending April 5, a total of 641 barges transited upbound at Locks 27, 404 were empty and 76 contained fertilizers. On April 9, the maximum ice thickness on Lake Pepin on the Mississippi River was 22 inches, more than the typical 12 to 15 inches of ice that a barge can break through for passage through the lake. Once ice on the lake is thin enough for barges to navigate, this will allow the eventual opening of the entire navigable portion of the Mississippi River. For more information on Lake Pepin, see [GTR-3/20/2014](#).

### AMS Publishes Rail Rate Mediation and Arbitration for Grain Shippers.

The Agricultural Marketing Service has published a [paper](#) on the benefits of rail rate mediation and arbitration. When producers and marketers of agricultural products believe the rates they are paying for transportation are too high or uncompetitive, they need access to a dispute-settlement mechanism that is fair, easily understood, accessible, and affordable. Rail rate mediation and arbitration could be a less expensive and simpler means of challenging unreasonable rail freight rates than the formal Surface Transportation Board procedures. Rail rate mediation and arbitration of rail rates is currently used in Montana on the BNSF.

### USDA Submits Comments in STB Hearing on Rail Service Issues

USDA submitted written comments this week, ahead of today's hearing, to the Surface Transportation Board (STB) in Ex Parte 724: United States Rail Service Issues. [USDA](#) provided examples of the negative effects service issues have had for agricultural producers and exporters during the past six months. In addition, USDA expressed its concern whether the service issues would be resolved prior to the 2014 harvest.

## Snapshots by Sector

### **Rail**

U.S. railroads originated 22,070 [carloads of grain](#) during the week ending March 29, up 12 percent from last week, 43 percent from last year, and 10 percent from the 3-year average.

During the week ending April 3, average April non-shuttle [secondary railcar bids/offers per car](#) were \$1,325 above tariff, down \$550 from last week and \$1,328 higher than last year. Average shuttle secondary railcar bids/offers per car were \$1,933.50 above tariff, down \$604 from last week and \$2,144.50 higher than last year.

### **Barge**

During the week ending April 5, [barge grain movements](#) totaled 634,650 tons—21.3 percent lower than the previous week but 120.2 percent higher than the same period last year.

During the week ending April 5, 419 grain barges [moved down river](#), down 15.4 percent from last week; 709 grain barges were [unloaded in New Orleans](#), down 6.8 percent from the previous week.

### **Ocean**

During the week ending April 3, 40 [ocean-going grain vessels](#) were loaded in the Gulf, 60 percent more than the same period last year. Sixty-two vessels are expected to be loaded within the next 10 days, 77 percent more than the same period last year.

During the week ending April 4, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$50 per mt, down 3 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$27 per mt, down 4 percent from the previous week.

### **Fuel**

During the week ending April 7, U.S. average [diesel fuel prices](#) decreased 2 cents from the previous week to \$3.96 per gallon—down 2 cents from with the same week last year.

# Feature Article/Calendar

## Grain Rail Service Update

Railroad service to grain shippers, which has deteriorated this fall and winter for several rail carriers, is expected to recover by late summer or fall, but could continue into 2015. Much of the rail service problems in the United States are centered on the BNSF Railway (BNSF), but similar problems have been reported for the Canadian National (CN) and Canadian Pacific (CP) railways' lines in Canada and on portions of their lines in the United States. Problems associated with deteriorated rail service include grain shippers paying up to \$6,000 to obtain empty railcars, grain piling up on the ground outside elevators awaiting rail transportation, and some grain shippers either paying ocean vessel demurrage charges, or missing vessels that departed before the delayed grain shipments could be loaded. Early on, some of these additional costs were likely borne by the exporter through reduced margins, but more recently are likely reflected in the prices paid to farmers for their crops.

Since October 1, the amount of grain shipped via U.S.-owned Class I railroads is currently behind expectations given past performance following previous grain harvests. Grain carloads are about 42,000 carloads behind the 2009-2010 harvest and about 111,000 carloads behind the 2007-2008 harvest (Tables 1 and 2). Both harvests set records in terms of corn, wheat, and soybean production. Some grain traffic has switched from BNSF to other U.S. Class I carriers. Kansas City Southern and Norfolk Southern are hauling close to their all-time highs as a percentage of total grain rail traffic.

**Table 1: Comparison of Railroad Grain Movements**

| Period<br>(Oct. through Mar.) | BNSF<br>Carloads | Surplus /      | CN<br>Carloads | Surplus /      | CP<br>Carloads | Surplus /      | U.S. Railroads<br>Carloads | Surplus /      |
|-------------------------------|------------------|----------------|----------------|----------------|----------------|----------------|----------------------------|----------------|
|                               |                  | (Deficit)      |                | (Deficit)      |                | (Deficit)      |                            | (Deficit)      |
|                               |                  | 2013 to period |                | 2013 to period |                | 2013 to period |                            | 2013 to period |
| 2007-2008                     | 305,189          | (74,511)       | 125,731        | (10,760)       | 125,903        | 9,342          | 659,532                    | (110,784)      |
| 2008-2009                     | 258,365          | (27,687)       | 115,797        | (826)          | 149,283        | (14,038)       | 552,300                    | (3,552)        |
| 2009-2010                     | 275,532          | (44,854)       | 103,079        | 11,892         | 135,266        | (21)           | 590,772                    | (42,024)       |
| 2010-2011                     | 296,477          | (65,799)       | 105,135        | 9,836          | 123,930        | 11,315         | 617,488                    | (68,740)       |
| 2011-2012                     | 270,066          | (39,388)       | 101,757        | 13,214         | 140,065        | (4,820)        | 553,823                    | (5,075)        |
| 2012-2013                     | 255,588          | (24,910)       | 98,546         | 16,425         | 145,780        | (10,535)       | 480,488                    | 68,260         |
| 2013-2014                     | 230,678          | -              | 114,971        | -              | 135,245        | -              | 548,748                    | -              |
| prior 5-year avg              | 271,206          | (40,528)       | 104,863        | 10,108         | 138,865        | (3,620)        | 558,974                    | (10,226)       |

Source: Association of American Railroads, Weekly Rail Traffic

**Table 2: Comparison of Railroad Grain Movements**

| Period<br>(Oct. through Mar.) | CSX<br>Carloads | Surplus /      | NS<br>Carloads | Surplus /      | KCS<br>Carloads | Surplus /      | UP<br>Carloads | Surplus /      |
|-------------------------------|-----------------|----------------|----------------|----------------|-----------------|----------------|----------------|----------------|
|                               |                 | (Deficit)      |                | (Deficit)      |                 | (Deficit)      |                | (Deficit)      |
|                               |                 | 2013 to period |                | 2013 to period |                 | 2013 to period |                | 2013 to period |
| 2007-2008                     | 81,911          | (23,580)       | 82,830         | 3,645          | 18,442          | 7,673          | 171,160        | (24,011)       |
| 2008-2009                     | 62,935          | (4,604)        | 75,224         | 11,251         | 20,093          | 6,022          | 135,683        | 11,466         |
| 2009-2010                     | 60,118          | (1,787)        | 81,557         | 4,918          | 21,152          | 4,963          | 152,413        | (5,264)        |
| 2010-2011                     | 58,874          | (543)          | 82,342         | 4,133          | 16,628          | 9,487          | 163,167        | (16,018)       |
| 2011-2012                     | 58,470          | (139)          | 77,269         | 9,206          | 13,810          | 12,305         | 134,208        | 12,941         |
| 2012-2013                     | 41,336          | 16,995         | 70,886         | 15,589         | 12,948          | 13,167         | 99,730         | 47,419         |
| 2013-2014                     | <b>58,331</b>   | -              | <b>86,475</b>  | -              | <b>26,115</b>   | -              | <b>147,149</b> | -              |
| prior 5-year avg              | 56,347          | 1,984          | 77,456         | 9,019          | 16,926          | 9,189          | 137,040        | 10,109         |

Source: Association of American Railroads, Weekly Rail Traffic

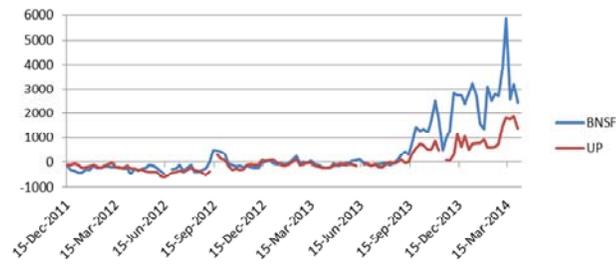
Train speeds for BNSF grain trains have decreased and cycle times to Pacific Northwest markets have increased. BNSF grain train speed has decreased 15 percent, from 23.8 miles per hour in February 2013 to 20.3 miles per hour during February 2014. During January, grain unit trains from Minnesota or Iowa to the Pacific Northwest were taking as long as 22 days, compared to a normal transit time of 12 days.

Consequently, BNSF grain shippers have paid record-high rates for delivery of empty grain cars in the secondary railcar markets (reportedly as much as \$6,000 per empty grain car (see second figure)—approximately \$1.65 per bushel), which could make U.S. grain less competitive in world markets and/or reduce the amount of revenue earned by agricultural producers and exporters. Bids in the secondary railcar market for empty grain cars continued to climb with new records being set in December, January, February, and March. This indicates empty railcar supply

was increasingly inadequate relative to demand during this period. However, bids have fallen recently, indicating some improvement.

Bids represent an additional premium to securing guaranteed railcar service during a specific time period. Because only a limited number of guaranteed railcars are made available by railroads for a given month, shippers will bid higher and higher premiums to secure railcars as demand increases. Inadequate supply relative to demand has also driven up bids for service on Union Pacific Railroad (UP) as shippers switch carriers.<sup>1</sup> These costs are in addition to what shippers must pay BNSF directly through tariffs and fuel surcharges, which currently total between \$4,000 and \$6,000 per car on key grain routes.

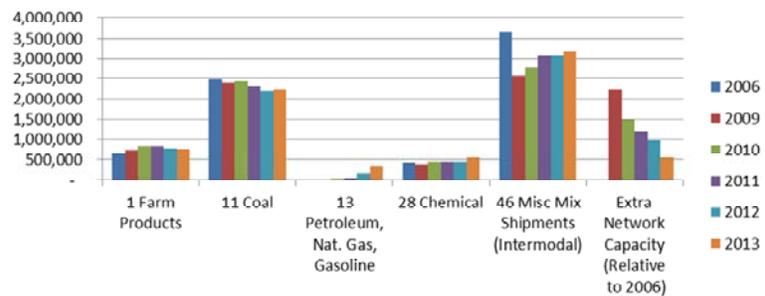
**Average Secondary Railcar Market Shuttle Bids per Car**



BNSF states that poor service has resulted from a simultaneous combination of strained capacity and increased demand for rail service. On the supply side, current capacity has been reduced by track work to expand future capacity, which involves shutting down lanes at least 10–12 hours daily while the work is being done. In addition, the extreme winter has compounded and made the backlog situation even worse. When temperatures are below -15° F, trains cannot be as long because the cold diminishes the effectiveness of air brakes. This means that railroads require more crew and locomotives to move the same amount of traffic.

On the demand side, annual traffic on the BNSF network has recovered from a low of 79 percent in 2009 to 95 percent in 2013 relative to the peak achieved in 2006. Annual farm product traffic has varied significantly with harvests, falling 73,088 carloads between the 2011/2012 harvest and the 2012/2013 harvest. However, farm products jumped 25,604 carloads between the third and fourth quarters of 2013 with the unexpectedly large harvest. Coal traffic was 158,985 carloads less in 2013 than in 2009, but coal had its first increase in 3 years, adding 56,167 carloads in 2013. Chemical traffic has grown fairly steadily since 2009, 153,026 carloads higher in 2013 than in 2009.

**BNSF Total Revenue Freight Carried, Carloads**



Source: Surface Transportation Board - Quarterly Freight Commodity Statistics

Petroleum and intermodal have grown consistently since 2009, 315,203 and 603,162 carloads higher, respectively, in 2013 than in 2009, with petroleum carloads doubling between 2012 and 2013. Together, constrained supply and traffic growth have consumed the extra capacity in the network that existed in previous years to handle any seasonal demand surges, such as the unexpected record harvest.

On March 21, BNSF reported that 16,761 grain railcars were past due by an average of 23.4 days. North Dakota had 7,474 grain railcars past due by an average of 21.4 days, Montana had 3,322 grain railcars late by an average of 25 days, South Dakota had 1,300 grain railcars past due by an average of 25.9 days, and Minnesota had 1,463 grain railcars past due by an average of 23.3 days. However, BNSF has shown recent improvements, reporting that North Region dwell time improved 11 percent since the first week of February and North Region train speed improved 1 percent during the same period.

Although there have been recent signs of improving rail service, there is concern that this year's crop will not be moved before the new crop has to go into storage, which could create major problems during the upcoming 2014 harvest. There are reports of elevator operators storing millions of bushels of grain on the ground and refusing to buy more from farmers. Reports from North Dakota co-op managers indicate 50 to 70 percent of this year's corn crop is still in either on-farm or warehouse storage. [Marvin.Prater@USDA.gov](mailto:Marvin.Prater@USDA.gov); [Adam.Sparger@USDA.gov](mailto:Adam.Sparger@USDA.gov)

<sup>1</sup> USDA does not have secondary railcar market prices for empty railcars originating on CP and CN.

# Grain Transportation Indicators

Table 1

## Grain Transport Cost Indicators<sup>1</sup>

| Week ending | Truck | Rail       |         | Barge | Ocean |         |
|-------------|-------|------------|---------|-------|-------|---------|
|             |       | Unit Train | Shuttle |       | Gulf  | Pacific |
| 04/09/14    | 266   | 312        | 298     | 206   | 224   | 191     |
| 04/02/14    | 267   | 343        | 324     | 231   | 230   | 199     |

<sup>1</sup>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 | 4/4/2014 | 3/28/2014 |
|-----------|---------------------|----------|-----------|
| Corn      | IL--Gulf            | -0.82    | -0.95     |
| Corn      | NE--Gulf            | -1.00    | -1.12     |
| Soybean   | IA--Gulf            | -1.17    | -1.27     |
| HRW       | KS--Gulf            | -1.85    | -1.85     |
| HRS       | ND--Portland        | -3.01    | -3.15     |

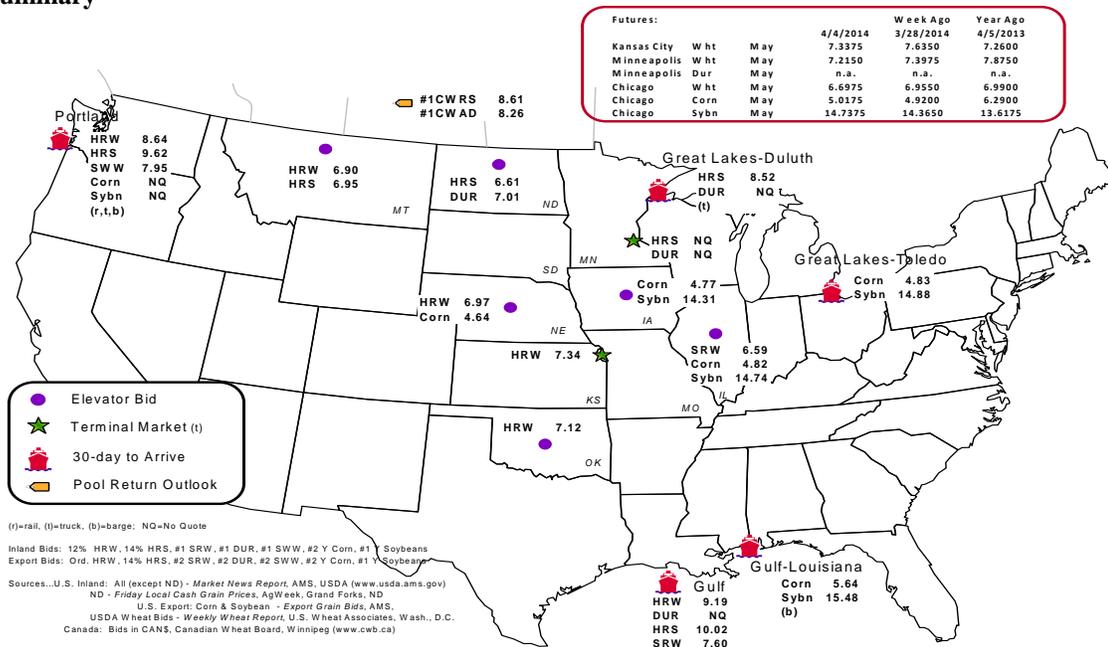
Note: nq = no quote

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)<sup>1</sup>

| Week ending                                   | Mississippi |            | Pacific   | Atlantic & | Total   | Week ending      | Cross-Border        |
|---|-------------|------------|-----------|------------|---------|------------------|---------------------|
|   | Gulf        | Texas Gulf | Northwest | East Gulf  |         |                  | Mexico <sup>3</sup> |
| 4/02/2014 <sup>p</sup>                        | 1,065       | 1,307      | 4,578     | 619        | 7,569   | 3/29/2014        | 1,752               |
| 3/26/2014 <sup>r</sup>                        | 920         | 1,397      | 5,692     | 977        | 8,986   | 3/22/2014        | 1,917               |
| 2014 YTD <sup>r</sup>                         | 16,176      | 21,440     | 72,605    | 11,870     | 122,091 | 2014 YTD         | 24,062              |
| 2013 YTD <sup>r</sup>                         | 7,767       | 13,317     | 56,621    | 7,989      | 85,694  | 2013 YTD         | 15,734              |
| 2014 YTD as % of 2013 YTD                     | 208         | 161        | 128       | 149        | 142     | % change YTD     | 153                 |
| Last 4 weeks as % of 2013 <sup>2</sup>        | 1,100       | 108        | 145       | 397        | 160     | Last 4wks % 2013 | 142                 |
| Last 4 weeks as % of 4-year avg. <sup>2</sup> | 192         | 94         | 125       | 142        | 124     | Last 4wks % 4 yr | 92                  |
| 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              |

<sup>1</sup> Data is incomplete as it is voluntarily provided

<sup>2</sup> Compared with same 4-weeks in 2013 and prior 4-year average.

<sup>3</sup> Cross-border weekly data is approximately 15 percent below the Association of American Railroads reported weekly carloads received by Mexican railroads to reflect switching between KCSM and FerroMex.

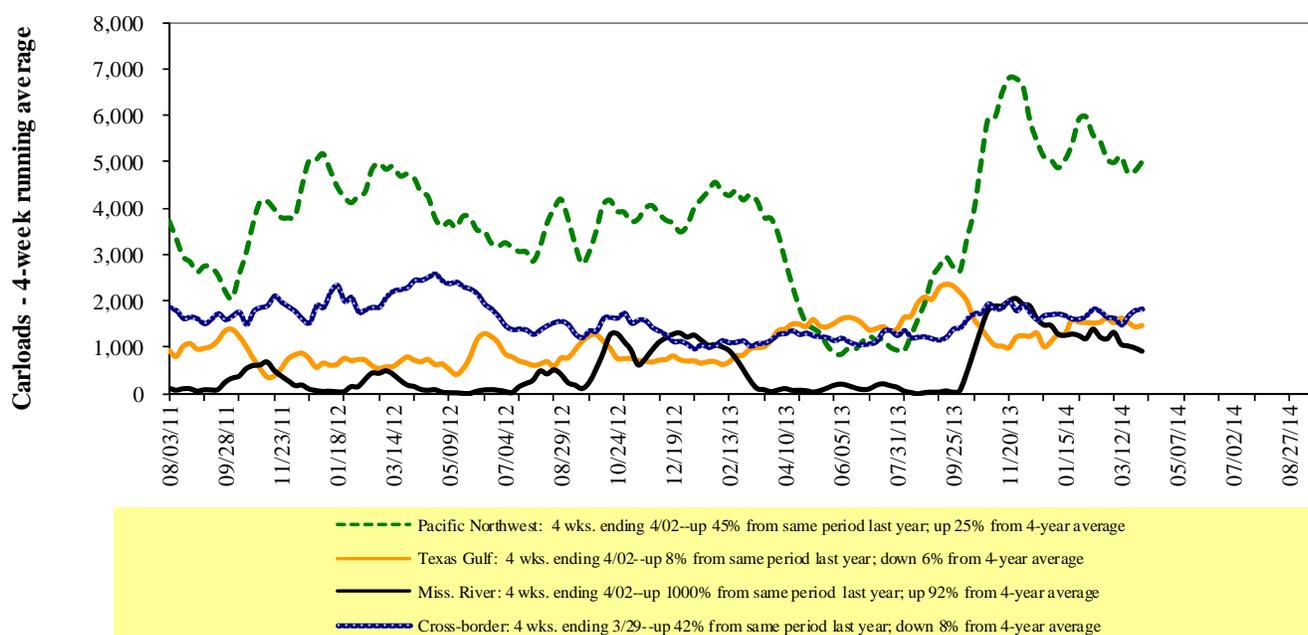
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 29 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

## Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

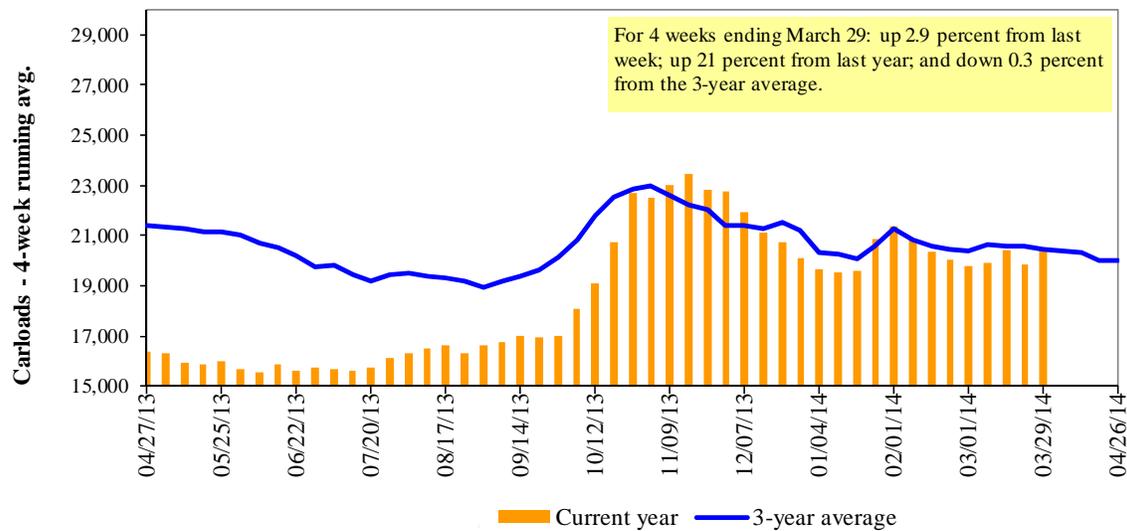
Table 4

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

| Week ending                                 | East   |         | West    |        |         | U.S. total | Canada  |         |
|---|--------|---------|---------|--------|---------|------------|---------|---------|
|   | CSXT   | NS      | BNSF    | KCS    | UP      |            | CN      | CP      |
| 03/29/14                                    | 2,231  | 3,310   | 9,490   | 1,103  | 5,936   | 22,070     | 5,053   | 6,045   |
| This week last year                         | 846    | 2,215   | 8,158   | 201    | 3,968   | 15,388     | 2,492   | 4,814   |
| 2014 YTD                                    | 26,410 | 39,048  | 111,241 | 12,781 | 75,557  | 265,037    | 51,411  | 61,439  |
| 2013 YTD                                    | 19,590 | 33,005  | 121,452 | 6,083  | 49,777  | 229,907    | 43,930  | 67,969  |
| 2014 YTD as % of 2013 YTD                   | 135    | 118     | 92      | 210    | 152     | 115        | 117     | 90      |
| Last 4 weeks as % of 2013                   | 153    | 138     | 96      | 221    | 147     | 121        | 151     | 94      |
| Last 4 weeks as % of 3-yr avg. <sup>1</sup> | 108    | 116     | 83      | 185    | 114     | 100        | 120     | 94      |
| Total 2013                                  | 86,466 | 137,915 | 454,262 | 34,412 | 222,258 | 935,313    | 190,125 | 272,753 |

<sup>1</sup>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<sup>1</sup> (\$/car)<sup>2</sup>**

| Week ending                       | Delivery period |         |          |         |          |         |          |         |
|-----------------------------------|-----------------|---------|----------|---------|----------|---------|----------|---------|
|                                   | Apr-14          | Apr-13  | May-14   | May-13  | Jun-14   | Jun-13  | Jul-14   | Jul-13  |
| BNSF <sup>3</sup>                 |                 |         |          |         |          |         |          |         |
| COT grain units                   | no offer        | 0       | no offer | no bids | no offer | no bids | no offer | 0       |
| COT grain single-car <sup>5</sup> | no offer        | 0       | no offer | 0 . . 5 | no offer | no bids | no offer | no bids |
| UP <sup>4</sup>                   |                 |         |          |         |          |         |          |         |
| 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 | 412      | no bids | n/a      | n/a     |

<sup>1</sup>Auction offerings are for single-car and unit train shipments only.

<sup>2</sup>Average premium/discount to tariff, last auction

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

<sup>4</sup>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.

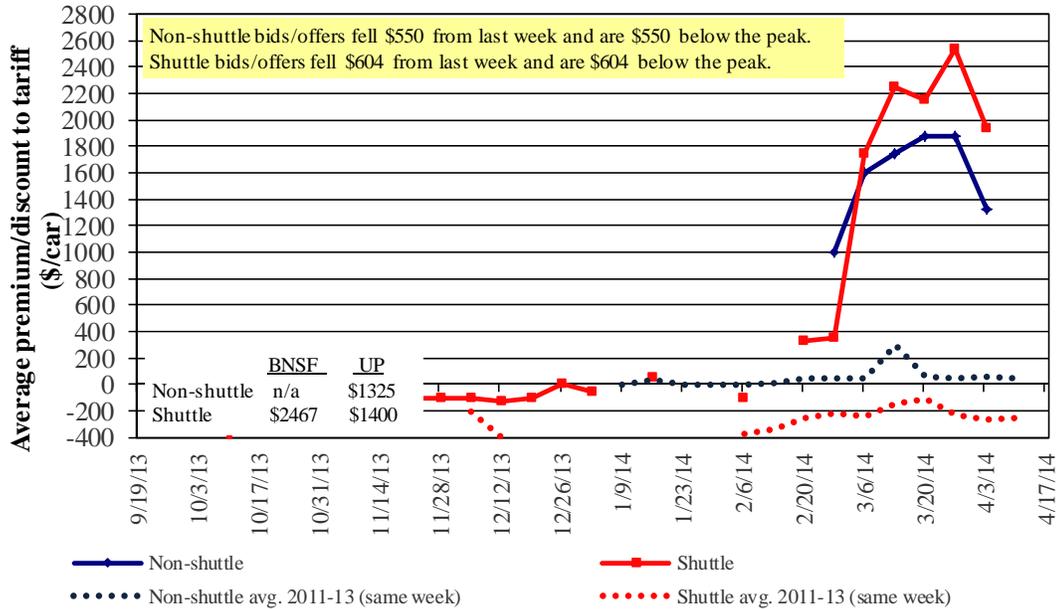
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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**

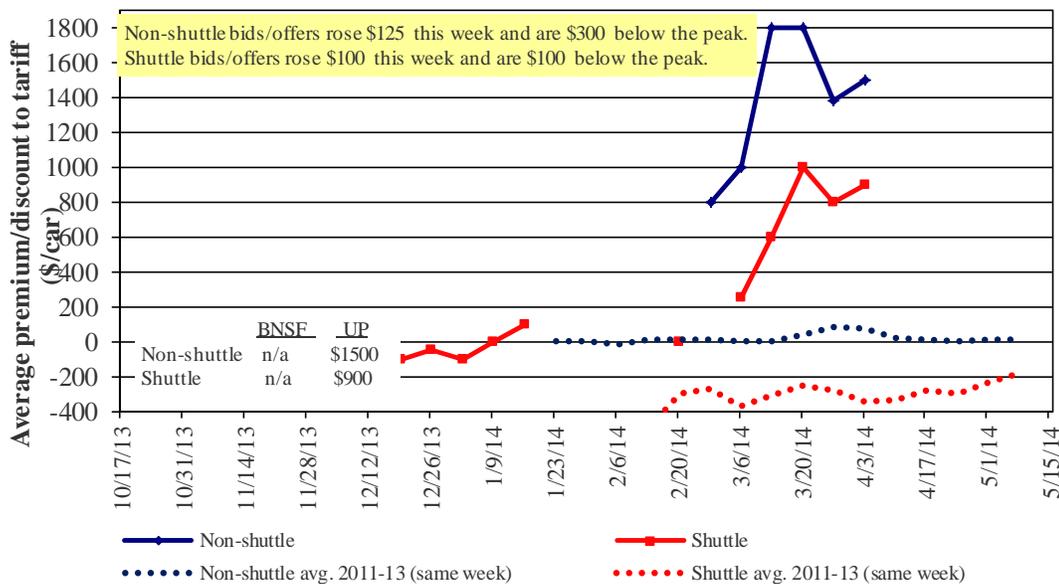


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

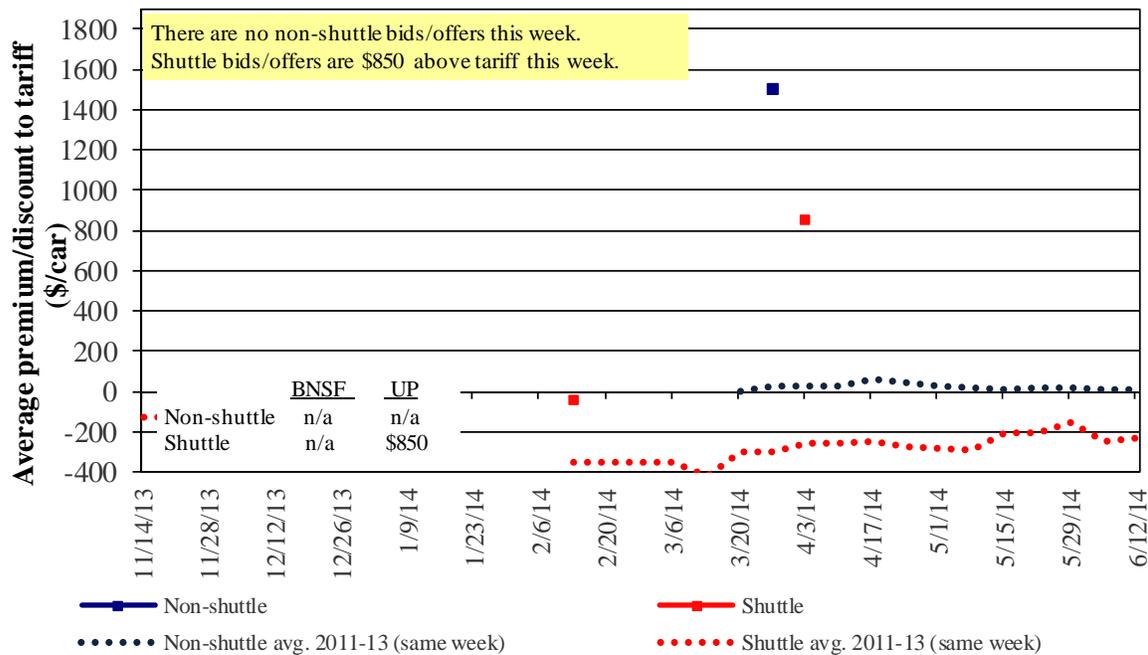


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

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)<sup>1</sup>**

| Week ending                | Delivery period |        |        |        |        |        |
|----------------------------|-----------------|--------|--------|--------|--------|--------|
|                            | Apr-14          | May-14 | Jun-14 | Jul-14 | Aug-14 | Sep-14 |
| <b>Non-shuttle</b>         |                 |        |        |        |        |        |
| BNSF-GF                    | 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 2013 | n/a             | n/a    | n/a    | n/a    | n/a    | n/a    |
| UP-Pool                    | 1,325           | 1,500  | n/a    | n/a    | n/a    | n/a    |
| Change from last week      | (425)           | 250    | n/a    | n/a    | n/a    | n/a    |
| Change from same week 2013 | 1,325           | n/a    | n/a    | n/a    | n/a    | n/a    |
| <b>Shuttle<sup>2</sup></b> |                 |        |        |        |        |        |
| BNSF-GF                    | 2,467           | n/a    | n/a    | n/a    | n/a    | 1,800  |
| Change from last week      | (733)           | n/a    | n/a    | n/a    | n/a    | 300    |
| Change from same week 2013 | 2,664           | n/a    | n/a    | n/a    | n/a    | n/a    |
| UP-Pool                    | 1,400           | 900    | 850    | n/a    | n/a    | n/a    |
| Change from last week      | (475)           | 100    | n/a    | n/a    | n/a    | n/a    |
| Change from same week 2013 | 1,625           | 1,117  | n/a    | n/a    | n/a    | n/a    |

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

<sup>2</sup> 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<sup>1</sup>**

| Effective date:      |                      |                       |                 | Fuel              | Tariff plus surcharge per: |                                 | Percent                 |
|----------------------|----------------------|-----------------------|-----------------|-------------------|----------------------------|---------------------------------|-------------------------|
| 4/1/2014             | Origin region*       | Destination region*   | Tariff rate/car | surcharge per car | metric ton                 | bushe <sup>l</sup> <sup>2</sup> | change Y/Y <sup>3</sup> |
| <b>Unit train</b>    |                      |                       |                 |                   |                            |                                 |                         |
| Wheat                | Wichita, KS          | St. Louis, MO         | \$3,191         | \$192             | \$33.60                    | \$0.91                          | 1                       |
|                      | Grand Forks, ND      | Duluth-Superior, MN   | \$3,596         | \$113             | \$36.83                    | \$1.00                          | 1                       |
|                      | Wichita, KS          | Los Angeles, CA       | \$6,244         | \$581             | \$67.78                    | \$1.84                          | 3                       |
|                      | Wichita, KS          | New Orleans, LA       | \$3,808         | \$338             | \$41.17                    | \$1.12                          | 3                       |
|                      | Sioux Falls, SD      | Galveston-Houston, TX | \$5,824         | \$477             | \$62.57                    | \$1.70                          | 4                       |
|                      | Northwest KS         | Galveston-Houston, TX | \$4,076         | \$371             | \$44.16                    | \$1.20                          | 3                       |
|                      | Amarillo, TX         | Los Angeles, CA       | \$4,275         | \$516             | \$47.57                    | \$1.29                          | 3                       |
| Corn                 | Champaign-Urbana, IL | New Orleans, LA       | \$3,192         | \$382             | \$35.49                    | \$0.90                          | 1                       |
|                      | Toledo, OH           | Raleigh, NC           | \$4,686         | \$433             | \$50.83                    | \$1.29                          | 3                       |
|                      | Des Moines, IA       | Davenport, IA         | \$2,078         | \$81              | \$21.44                    | \$0.54                          | 3                       |
|                      | Indianapolis, IN     | Atlanta, GA           | \$4,061         | \$325             | \$43.56                    | \$1.11                          | 3                       |
|                      | Indianapolis, IN     | Knoxville, TN         | \$3,469         | \$209             | \$36.52                    | \$0.93                          | 3                       |
|                      | Des Moines, IA       | Little Rock, AR       | \$3,218         | \$238             | \$34.32                    | \$0.87                          | 1                       |
|                      | Des Moines, IA       | Los Angeles, CA       | \$5,215         | \$693             | \$58.67                    | \$1.49                          | 2                       |
| Soybeans             | Minneapolis, MN      | New Orleans, LA       | \$3,424         | \$425             | \$38.22                    | \$1.04                          | -2                      |
|                      | Toledo, OH           | Huntsville, AL        | \$3,687         | \$308             | \$39.67                    | \$1.08                          | 2                       |
|                      | Indianapolis, IN     | Raleigh, NC           | \$4,756         | \$436             | \$51.56                    | \$1.40                          | 3                       |
|                      | Indianapolis, IN     | Huntsville, AL        | \$3,379         | \$209             | \$35.63                    | \$0.97                          | 3                       |
|                      | Champaign-Urbana, IL | New Orleans, LA       | \$3,748         | \$382             | \$41.02                    | \$1.12                          | 3                       |
| <b>Shuttle Train</b> |                      |                       |                 |                   |                            |                                 |                         |
| Wheat                | Great Falls, MT      | Portland, OR          | \$3,678         | \$334             | \$39.85                    | \$1.08                          | 2                       |
|                      | Wichita, KS          | Galveston-Houston, TX | \$3,798         | \$260             | \$40.30                    | \$1.10                          | 4                       |
|                      | Chicago, IL          | Albany, NY            | \$3,950         | \$406             | \$43.26                    | \$1.18                          | 4                       |
|                      | Grand Forks, ND      | Portland, OR          | \$5,159         | \$578             | \$56.97                    | \$1.55                          | 1                       |
|                      | Grand Forks, ND      | Galveston-Houston, TX | \$6,084         | \$602             | \$66.39                    | \$1.81                          | -1                      |
|                      | Northwest KS         | Portland, OR          | \$5,043         | \$608             | \$56.11                    | \$1.53                          | 2                       |
| Corn                 | Minneapolis, MN      | Portland, OR          | \$5,000         | \$703             | \$56.64                    | \$1.44                          | 3                       |
|                      | Sioux Falls, SD      | Tacoma, WA            | \$4,960         | \$644             | \$55.65                    | \$1.41                          | 3                       |
|                      | Champaign-Urbana, IL | New Orleans, LA       | \$3,011         | \$382             | \$33.70                    | \$0.86                          | 2                       |
|                      | Lincoln, NE          | Galveston-Houston, TX | \$3,510         | \$375             | \$38.58                    | \$0.98                          | 5                       |
|                      | Des Moines, IA       | Amarillo, TX          | \$3,590         | \$299             | \$38.62                    | \$0.98                          | 1                       |
|                      | Minneapolis, MN      | Tacoma, WA            | \$5,000         | \$698             | \$56.58                    | \$1.44                          | 3                       |
| Soybeans             | Council Bluffs, IA   | Stockton, CA          | \$4,400         | \$722             | \$50.86                    | \$1.29                          | 3                       |
|                      | Sioux Falls, SD      | Tacoma, WA            | \$5,520         | \$644             | \$61.21                    | \$1.67                          | 2                       |
|                      | Minneapolis, MN      | Portland, OR          | \$5,530         | \$703             | \$61.90                    | \$1.68                          | 2                       |
|                      | Fargo, ND            | Tacoma, WA            | \$5,430         | \$573             | \$59.61                    | \$1.62                          | 3                       |
|                      | Council Bluffs, IA   | New Orleans, LA       | \$4,175         | \$441             | \$45.84                    | \$1.25                          | 4                       |
|                      | Toledo, OH           | Huntsville, AL        | \$2,862         | \$308             | \$31.47                    | \$0.86                          | 3                       |
|                      | Grand Island, NE     | Portland, OR          | \$5,110         | \$622             | \$56.92                    | \$1.55                          | -2                      |

<sup>1</sup>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.

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

<sup>3</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

Sources: [www.bnsf.com](http://www.bnsf.com), [www.cpr.ca](http://www.cpr.ca), [www.csx.com](http://www.csx.com), [www.uprr.com](http://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: 4/1/2014

| Commodity | Origin state | Destination region   | Tariff rate/car <sup>1</sup> | Fuel                           |  | Percent change Y/Y <sup>4</sup> |    |
|-----------|--------------|----------------------|------------------------------|--------------------------------|--|---------------------------------|----|
|           |              |                      |                              | surcharge per car <sup>2</sup> | Tariff plus surcharge per: metric ton <sup>3</sup> bushel <sup>3</sup> |                                 |    |
| Wheat     | MT           | Chihuahua, CI        | \$6,360                      | \$611                          | \$71.23  | \$1.94                          | 1  |
|           | OK           | Cuautitlan, EM       | \$6,156                      | \$742                          | \$70.48  | \$1.92                          | -6 |
|           | KS           | Guadalajara, JA      | \$6,741                      | \$717                          | \$76.20  | \$2.07                          | -9 |
|           | TX           | Salinas Victoria, NL | \$3,688                      | \$280                          | \$40.54  | \$1.10                          | 3  |
| Corn      | IA           | Guadalajara, JA      | \$7,974                      | \$843                          | \$90.09  | \$2.29                          | 2  |
|           | SD           | Celaya, GJ           | \$7,656                      | \$800                          | \$86.40  | \$2.19                          | 3  |
|           | NE           | Queretaro, QA        | \$7,317                      | \$749                          | \$82.41  | \$2.09                          | 1  |
|           | SD           | Salinas Victoria, NL | \$5,880                      | \$608                          | \$66.29  | \$1.68                          | 2  |
|           | MO           | Tlalnepantla, EM     | \$6,755                      | \$728                          | \$76.46  | \$1.94                          | 1  |
|           | SD           | Torreon, CU          | \$6,722                      | \$670                          | \$75.52  | \$1.92                          | 2  |
| Soybeans  | MO           | Bojay (Tula), HG     | \$7,868                      | \$711                          | \$87.66  | \$2.38                          | 3  |
|           | NE           | Guadalajara, JA      | \$8,447                      | \$814                          | \$94.62  | \$2.57                          | 3  |
|           | IA           | El Castillo, JA      | \$8,855                      | \$795                          | \$98.60  | \$2.68                          | 3  |
|           | KS           | Torreon, CU          | \$6,864                      | \$505                          | \$75.28  | \$2.05                          | 2  |
| Sorghum   | TX           | Guadalajara, JA      | \$6,953                      | \$520                          | \$76.36  | \$1.94                          | 6  |
|           | NE           | Celaya, GJ           | \$7,212                      | \$726                          | \$81.10  | \$2.06                          | 2  |
|           | KS           | Queretaro, QA        | \$6,650                      | \$456                          | \$72.60  | \$1.84                          | -3 |
|           | NE           | Salinas Victoria, NL | \$5,368                      | \$534                          | \$60.30  | \$1.53                          | -2 |
|           | NE           | Torreon, CU          | \$6,243                      | \$596                          | \$69.88  | \$1.77                          | 1  |

<sup>1</sup>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.

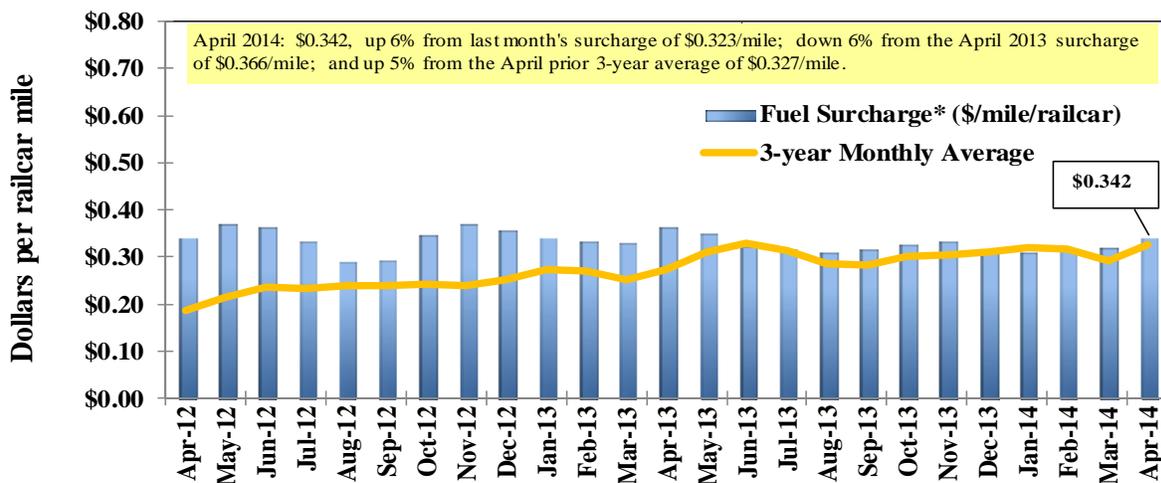
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V. railroad fuel surcharge policy as of 10/01/2009

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

<sup>4</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

Sources: www.bnsf.com, www.uprr.com, www.kcsouthern.com

Figure 7

**Railroad Fuel Surcharges, North American Weighted Average<sup>1</sup>**

<sup>1</sup> 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.

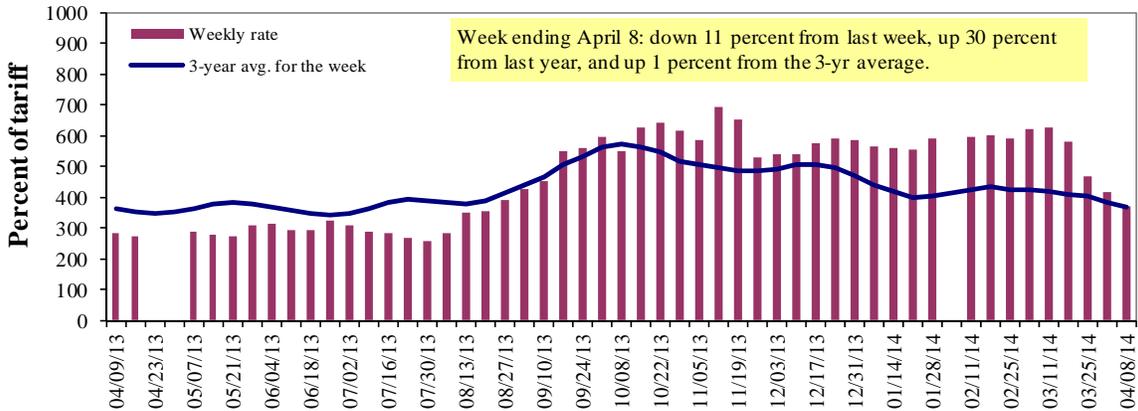
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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<sup>1,2</sup>



<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>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 |
|--|--------------------------|-------------|-----------------|----------------------|-----------|------------|------------|---------------|
| <b>Rate<sup>1</sup></b>                          | 4/8/2014                 | --          | 390             | 370                  | 252       | 312        | 312        | 222           |
|  | 4/1/2014                 | --          | 421             | 416                  | 300       | 336        | 336        | 250           |
| <b>\$/ton</b>                                    | 4/8/2014                 | --          | 20.75           | 17.17                | 10.05     | 14.63      | 12.60      | 6.97          |
|  | 4/1/2014                 | --          | 22.40           | 19.30                | 11.97     | 15.76      | 13.57      | 7.85          |
| <b>Current week % change from the same week:</b> |                          |             |                 |                      |           |            |            |               |
|  | Last year                | --          | 33              | 30                   | 11        | 58         | 58         | 23            |
|  | 3-year avg. <sup>2</sup> | --          | 8               | 1                    | -11       | -2         | -2         | -8            |
| <b>Rate<sup>1</sup></b>                          | May                      | 447         | 375             | 363                  | 253       | 303        | 303        | 222           |
|  | July                     | 447         | 375             | 363                  | 262       | 303        | 303        | 233           |

<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average; ton = 2,000 pounds;

Source: Transportation & Marketing Programs/AMS/USDA

### Calculating barge rate per ton:

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

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

Figure 9  
Benchmark tariff rates

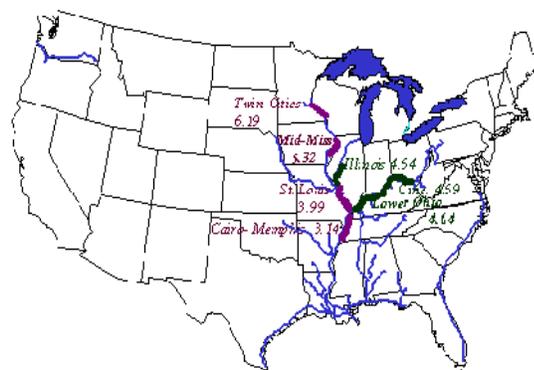
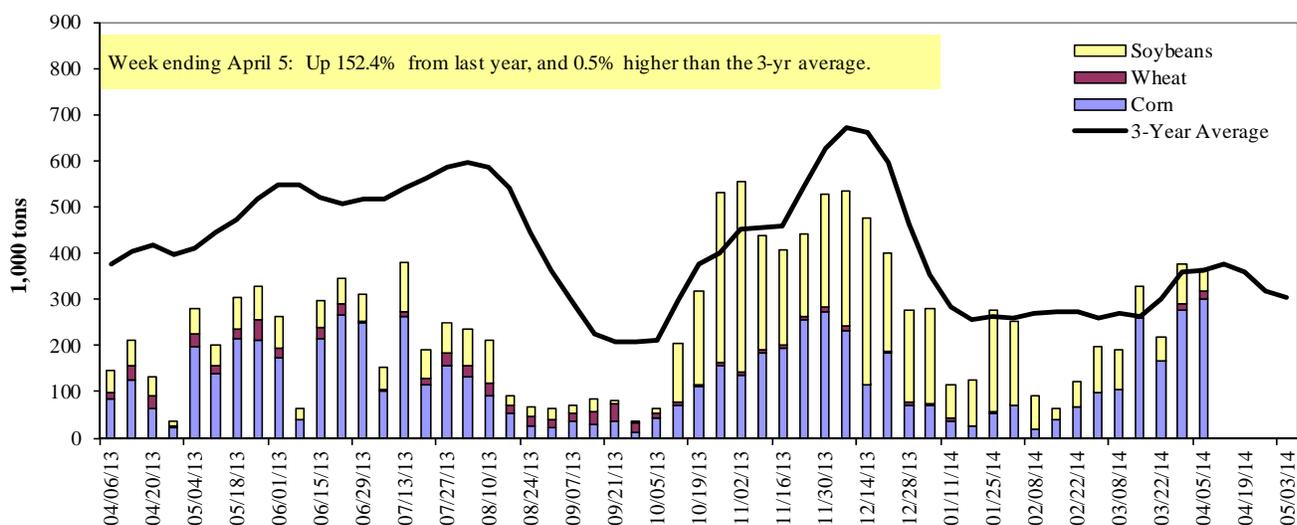


Figure 10

**Barge Movements on the Mississippi River<sup>1</sup> (Locks 27 - Granite City, IL)**



<sup>1</sup> 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 4/05/2014                  | Corn         | Wheat        | Soybeans      | Other      | Total         |
|--|--------------|--------------|---------------|------------|---------------|
| <b>Mississippi River</b>               |              |              |               |            |               |
| Rock Island, IL (L15)                  | 11           | 0            | 11            | 0          | 22            |
| Winfield, MO (L25)                     | 35           | 0            | 25            | 0          | 60            |
| Alton, IL (L26)                        | 307          | 19           | 34            | 0          | 360           |
| Granite City, IL (L27)                 | 300          | 19           | 47            | 0          | 365           |
| <b>Illinois River (L8)</b>             | 131          | 16           | 9             | 0          | 156           |
| <b>Ohio River (L52)</b>                | 186          | 19           | 26            | 0          | 232           |
| <b>Arkansas River (L1)</b>             | 6            | 28           | 3             | 1          | 38            |
| Weekly total - 2014                    | 0            | 66           | 76            | 1          | 635           |
| Weekly total - 2013                    | 142          | 51           | 87            | 8          | 288           |
| 2014 YTD <sup>1</sup>                  | 4,583        | 444          | 3,503         | 53         | 8,583         |
| 2013 YTD                               | 1,701        | 1,187        | 3,001         | 85         | 5,974         |
| 2014 as % of 2013 YTD                  | 269          | 37           | 117           | 62         | 144           |
| Last 4 weeks as % of 2013 <sup>2</sup> | 320          | 64           | 123           | 39         | 194           |
| <b>Total 2013</b>                      | <b>9,504</b> | <b>4,111</b> | <b>10,065</b> | <b>255</b> | <b>23,935</b> |

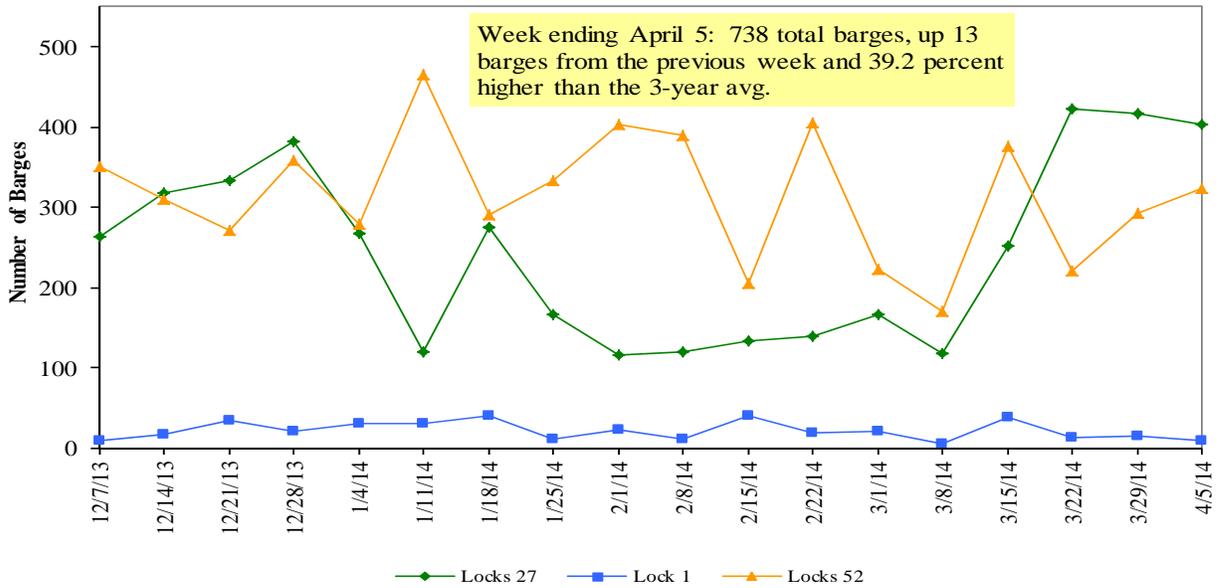
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

<sup>2</sup> As a percent of same period in 2013.

Note: Total may not add exactly, due to rounding

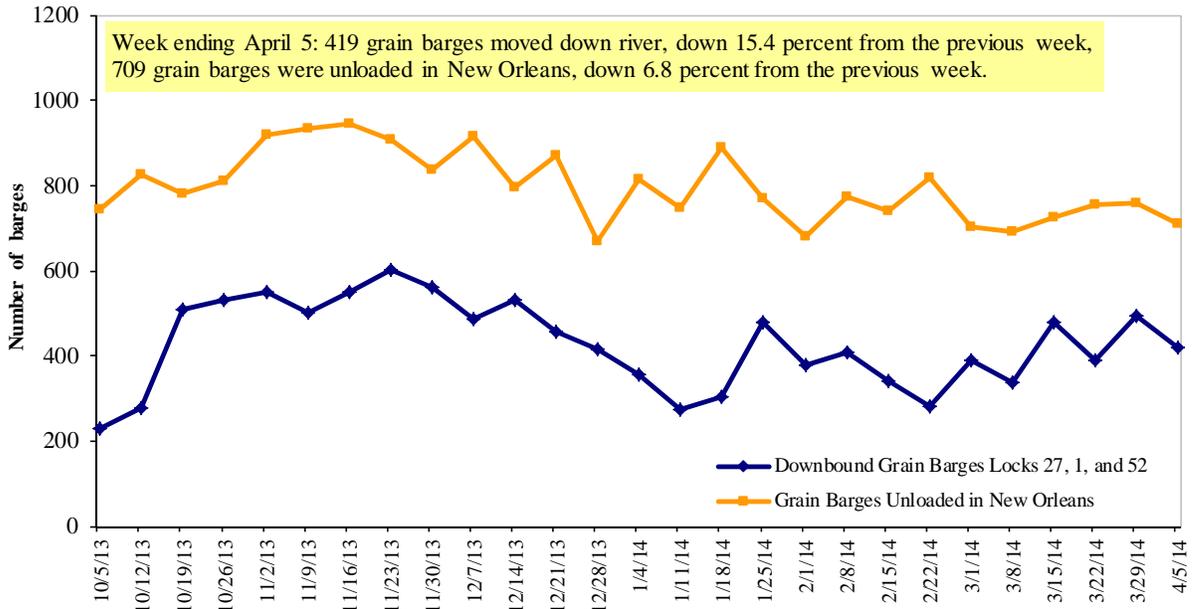
Source: U.S. Army Corps of Engineers

**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<sup>1</sup>, Week Ending 4/07/2013 (US \$/gallon)

| Region | Location                   | Price | Change from |          |
|--------|----------------------------|-------|-------------|----------|
|        |                            |       | Week ago    | Year ago |
| I      | East Coast                 | 4.075 | -0.019      | 0.066    |
|        | New England                | 4.240 | -0.015      | 0.106    |
|        | Central Atlantic           | 4.205 | -0.036      | 0.143    |
|        | Lower Atlantic             | 3.946 | -0.009      | 0.000    |
| II     | Midwest <sup>2</sup>       | 3.942 | -0.017      | -0.014   |
| III    | Gulf Coast <sup>3</sup>    | 3.793 | -0.011      | -0.095   |
| IV     | Rocky Mountain             | 3.955 | -0.020      | 0.056    |
| V      | West Coast                 | 3.982 | -0.008      | -0.135   |
|        | West Coast less California | 3.894 | -0.014      | -0.129   |
|        | California                 | 4.056 | -0.004      | -0.140   |
| Total  | U.S.                       | 3.959 | -0.016      | -0.018   |

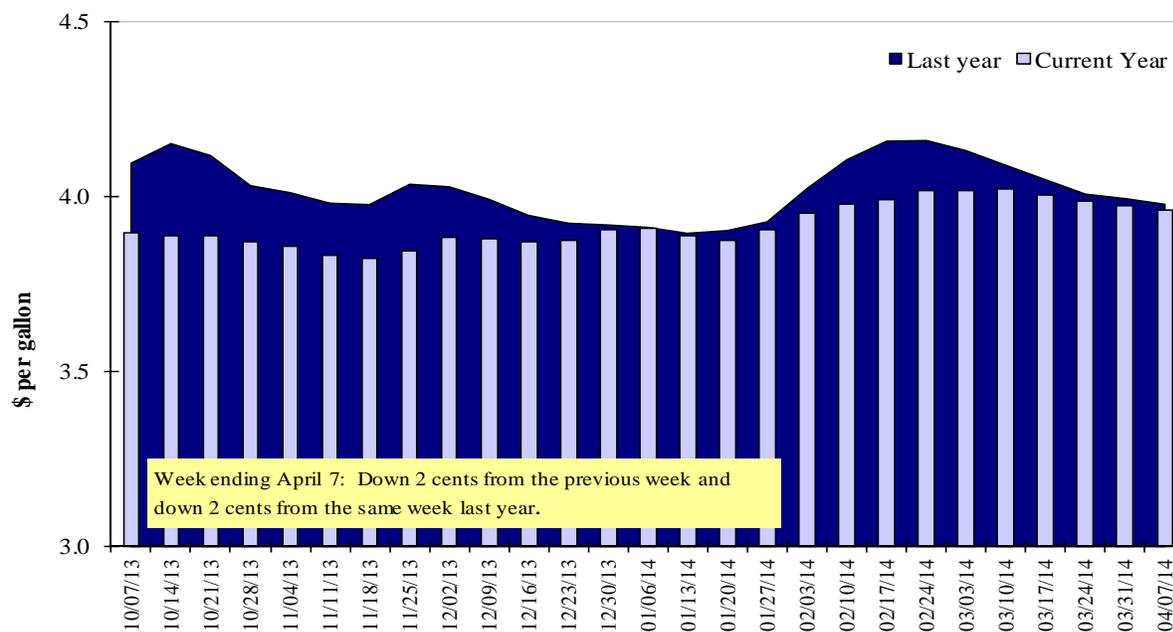
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<sup>2</sup>Same as North Central <sup>3</sup>Same as South Central

Source: Energy Information Administration/U.S. Department of Energy ([www.eia.doe.gov](http://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 |        |          |         |
| <b>Export Balances<sup>1</sup></b>                   |        |       |       |       |     |           |        |          |         |
| 3/27/2014  | 1,754  | 878   | 1,513 | 988   | 142 | 5,274     | 18,509 | 4,016    | 27,799  |
| This week year ago                                   | 1,987  | 1,070 | 1,218 | 653   | 78  | 5,006     | 4,306  | 3,122    | 12,434  |
| <b>Cumulative exports-marketing year<sup>2</sup></b> |        |       |       |       |     |           |        |          |         |
| 2013/14 YTD  | 9,637  | 6,583 | 5,041 | 3,375 | 344 | 24,979    | 22,823 | 40,495   | 88,297  |
| 2012/13 YTD  | 7,566  | 3,933 | 4,670 | 3,869 | 390 | 20,427    | 11,214 | 32,856   | 64,497  |
| YTD 2013/14 as % of 2012/13                          | 127    | 167   | 108   | 87    | 88  | 122       | 204    | 123      | 137     |
| Last 4 wks as % of same period 2012/13               | 86     | 88    | 133   | 162   | 197 | 110       | 437    | 162      | 236     |
| 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 |

<sup>1</sup> Current unshipped export sales to date

<sup>2</sup> 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](http://www.fas.usda.gov))

Table 13

## Top 5 Importers<sup>1</sup> of U.S. Corn

| Week ending 3/27/2014                                       | Total Commitments <sup>2</sup> |                    | % change<br>current MY<br>from last MY | Exports <sup>3</sup><br>2012/13 |
|---|--------------------------------|--------------------|--|---------------------------------|
|   | 2013/14<br>Current MY          | 2012/13<br>Last MY |  |                                 |
|   | - 1,000 mt -                   |                    |  | - 1,000 mt -                    |
| Japan   | 8,890                          | 5,407              | 64                                     | 7,000                           |
| Mexico  | 9,270                          | 3,620              | 156                                    | 4,370                           |
| China   | 3,831                          | 2,473              | 55                                     | 2,450                           |
| Venezuela   | 720                            | 538                | 34                                     | 1,158                           |
| Taiwan  | 1,345                          | 416                | 224                                    | 512                             |
| <b>Top 5 Importers</b>                                      | <b>24,057</b>                  | <b>12,453</b>      | <b>93</b>                              | <b>15,490</b>                   |
| <b>Total US corn export sales</b>                           | <b>41,333</b>                  | <b>15,520</b>      | <b>166</b>                             | <b>18,670</b>                   |
| % of Projected  | 93%                            | 83%                |  |                                 |
| Change from prior week                                      | 961                            | 354                |  |                                 |
| <b>Top 5 importers' share of U.S.<br/>corn export sales</b> | 58%                            | 80%                |  | 83%                             |
| <b>USDA forecast, April 2014</b>                            | <b>44,529</b>                  | <b>18,601</b>      | <b>139</b>                             |                                 |
| <b>Corn Use for Ethanol USDA<br/>forecast, April 2014</b>   | <b>127,000</b>                 | <b>118,059</b>     | <b>8</b>                               |                                 |

(n) indicates negative number.

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

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

<sup>3</sup> FAS Marketing Year Final Reports - [www.fas.usda.gov/export-sales/myfi\\_rpt.htm](http://www.fas.usda.gov/export-sales/myfi_rpt.htm) (Carry-over plus Accumulated Exports)

Table 14

**Top 5 Importers<sup>1</sup> of U.S. Soybeans**

| Week Ending 3/27/2014  | Total Commitments <sup>2</sup> |                    | % change<br>current MY<br>from last MY | Exports <sup>3</sup><br>2012/13 |
|--|--------------------------------|--------------------|--|---------------------------------|
|  | 2013/14<br>Current MY          | 2012/13<br>Last MY |  |                                 |
|  | - 1,000 mt -                   |                    |  | - 1,000 mt -                    |
| China  | 27,699                         | 21,762             | 27                                     | 21,522                          |
| Mexico   | 2,935                          | 2,113              | 39                                     | 2,565                           |
| Japan  | 1,652                          | 1,467              | 13                                     | 1,751                           |
| Indonesia  | 1,897                          | 1,225              | 55                                     | 1,682                           |
| Taiwan   | 1,062                          | 1,029              | 3                                      | 1,120                           |
| <b>Top 5 importers</b>   | <b>35,244</b>                  | <b>27,595</b>      | <b>28</b>                              | <b>28,641</b>                   |
| <b>Total US soybean export sales</b>                           | <b>44,511</b>                  | <b>35,978</b>      | <b>24</b>                              | <b>37,060</b>                   |
| % of Projected   | 103%                           | 100%               |  |                                 |
| Change from prior week   | 66                             | 393                |  |                                 |
| <b>Top 5 importers' share of U.S.<br/>soybean export sales</b> | <b>79%</b>                     | <b>77%</b>         |  |                                 |
| <b>USDA forecast, April 2014</b>                               | <b>43,052</b>                  | <b>35,967</b>      | <b>20</b>                              |                                 |

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports - [www.fas.usda.gov](http://www.fas.usda.gov); Marketing year (MY) = Sep 1 - Aug 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esquery/><sup>3</sup>FAS Marketing Year Final Reports - [www.fas.usda.gov/export-sales/myfi\\_rpt.htm](http://www.fas.usda.gov/export-sales/myfi_rpt.htm). (Carryover plus Accumulated Exports)

Table 15

**Top 10 Importers<sup>1</sup> of All U.S. Wheat**

| Week Ending 3/27/2014   | Total Commitments <sup>2</sup> |                    | % change<br>current MY<br>from last MY | Exports <sup>3</sup><br>2012/13 |
|---|--------------------------------|--------------------|--|---------------------------------|
|   | 2013/14<br>Current MY          | 2012/13<br>Last MY |  |                                 |
|   | - 1,000 mt -                   |                    |  | - 1,000 mt -                    |
| Japan   | 2,817                          | 3,463              | (19)                                   | 3,544                           |
| Nigeria   | 2,689                          | 2,766              | (3)                                    | 3,002                           |
| Mexico  | 2,879                          | 2,749              | 5                                      | 2,761                           |
| Philippines   | 1,936                          | 1,821              | 6                                      | 1,965                           |
| Egypt   | 1,389                          | 262                | 430                                    | 1,678                           |
| Korea   | 1,217                          | 1,375              | (12)                                   | 1,385                           |
| Taiwan  | 950                            | 988                | (4)                                    | 1,038                           |
| China   | 4,259                          | 789                | 440                                    | 743                             |
| Brazil  | 3,956                          | 436                | 808                                    | 527                             |
| Colombia  | 724                            | 557                | 30                                     | 600                             |
| <b>Top 10 importers</b>                                       | <b>22,814</b>                  | <b>15,204</b>      | <b>50</b>                              | <b>17,243</b>                   |
| <b>Total US wheat export sales</b>                            | <b>30,253</b>                  | <b>25,433</b>      | <b>19</b>                              | <b>26,348</b>                   |
| % of Projected  | 94%                            | 93%                |  |                                 |
| Change from prior week  | 336                            | 141                |  |                                 |
| <b>Top 10 importers' share of<br/>U.S. wheat export sales</b> | <b>75%</b>                     | <b>60%</b>         |  | <b>65%</b>                      |
| <b>USDA forecast, April 2014</b>                              | <b>32,016</b>                  | <b>27,439</b>      | <b>17</b>                              |                                 |

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports - [www.fas.usda.gov](http://www.fas.usda.gov); Marketing year = Jun 1 - May 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esquery/><sup>3</sup>FAS Marketing Year Final Reports - [www.fas.usda.gov/export-sales/myfi\\_rpt.htm](http://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<br>04/03/14 | Previous<br>Week <sup>1</sup> | Current Week<br>as % of Previous | 2014 YTD <sup>1</sup> | 2013 YTD <sup>1</sup> | 2014 YTD as<br>% of 2013 YTD | Last 4-weeks as % of |            | Total <sup>1</sup><br>2013 |
|--|-------------------------|-------------------------------|----------------------------------|-----------------------|-----------------------|------------------------------|----------------------|------------|----------------------------|
|  |                         |                               |                                  |                       |                       |                              | 2013                 | 3-yr. avg. |                            |
| <b>Pacific Northwest</b>                 |                         |                               |                                  |                       |                       |                              |                      |            |                            |
| Wheat                                    | 229                     | 311                           | 73                               | 3,093                 | 3,285                 | 94                           | 125                  | 109        | 11,585                     |
| Corn                                     | 234                     | 246                           | 95                               | 1,613                 | 1,160                 | 139                          | 116                  | 88         | 2,973                      |
| Soybeans                                 | 204                     | 70                            | 293                              | 4,398                 | 3,617                 | 122                          | 157                  | 141        | 9,090                      |
| <b>Total</b>                             | <b>666</b>              | <b>627</b>                    | <b>106</b>                       | <b>9,105</b>          | <b>8,062</b>          | <b>113</b>                   | <b>134</b>           | <b>114</b> | <b>23,647</b>              |
| <b>Mississippi Gulf</b>                  |                         |                               |                                  |                       |                       |                              |                      |            |                            |
| Wheat                                    | 165                     | 74                            | 222                              | 1,184                 | 2,526                 | 47                           | 34                   | 46         | 9,711                      |
| Corn                                     | 845                     | 956                           | 88                               | 8,260                 | 2,816                 | 293                          | 326                  | 201        | 14,828                     |
| Soybeans                                 | 229                     | 261                           | 88                               | 9,097                 | 6,391                 | 142                          | 271                  | 126        | 21,462                     |
| <b>Total</b>                             | <b>1,239</b>            | <b>1,292</b>                  | <b>96</b>                        | <b>18,540</b>         | <b>11,734</b>         | <b>158</b>                   | <b>201</b>           | <b>144</b> | <b>46,002</b>              |
| <b>Texas Gulf</b>                        |                         |                               |                                  |                       |                       |                              |                      |            |                            |
| Wheat                                    | 198                     | 86                            | 230                              | 1,863                 | 1,745                 | 107                          | 88                   | 64         | 9,039                      |
| Corn                                     | 31                      | 0                             | n/a                              | 174                   | 42                    | 410                          | 90                   | 28         | 255                        |
| Soybeans                                 | 0                       | 0                             | n/a                              | 255                   | 122                   | 208                          | n/a                  | 0          | 908                        |
| <b>Total</b>                             | <b>228</b>              | <b>86</b>                     | <b>266</b>                       | <b>2,292</b>          | <b>1,910</b>          | <b>120</b>                   | <b>88</b>            | <b>56</b>  | <b>10,203</b>              |
| <b>Interior</b>                          |                         |                               |                                  |                       |                       |                              |                      |            |                            |
| Wheat                                    | 39                      | 28                            | 140                              | 306                   | 253                   | 121                          | 86                   | 91         | 1,244                      |
| Corn                                     | 117                     | 100                           | 117                              | 1,401                 | 698                   | 201                          | 172                  | 76         | 3,943                      |
| Soybeans                                 | 74                      | 131                           | 56                               | 1,335                 | 1,228                 | 109                          | 410                  | 128        | 3,212                      |
| <b>Total</b>                             | <b>230</b>              | <b>259</b>                    | <b>89</b>                        | <b>3,042</b>          | <b>2,178</b>          | <b>140</b>                   | <b>159</b>           | <b>95</b>  | <b>8,399</b>               |
| <b>Great Lakes</b>                       |                         |                               |                                  |                       |                       |                              |                      |            |                            |
| Wheat                                    | 0                       | 0                             | n/a                              | 0                     | 45                    | 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                        |
| <b>Total</b>                             | <b>0</b>                | <b>0</b>                      | <b>n/a</b>                       | <b>0</b>              | <b>49</b>             | <b>0</b>                     | <b>0</b>             | <b>0</b>   | <b>1,583</b>               |
| <b>Atlantic</b>                          |                         |                               |                                  |                       |                       |                              |                      |            |                            |
| Wheat                                    | 8                       | 13                            | 61                               | 52                    | 297                   | 18                           | 7                    | 16         | 645                        |
| Corn                                     | 46                      | 5                             | 1,002                            | 81                    | 2                     | n/a                          | n/a                  | 138        | 242                        |
| Soybeans                                 | 18                      | 61                            | 30                               | 925                   | 619                   | 149                          | 244                  | 210        | 1,652                      |
| <b>Total</b>                             | <b>72</b>               | <b>79</b>                     | <b>91</b>                        | <b>1,058</b>          | <b>918</b>            | <b>115</b>                   | <b>86</b>            | <b>122</b> | <b>2,540</b>               |
| <b>U.S. total from ports<sup>2</sup></b> |                         |                               |                                  |                       |                       |                              |                      |            |                            |
| Wheat                                    | 639                     | 513                           | 125                              | 6,498                 | 8,151                 | 80                           | 172                  | 136        | 33,108                     |
| Corn                                     | 1,272                   | 1,306                         | 97                               | 11,530                | 4,718                 | 244                          | 410                  | 192        | 22,241                     |
| Soybeans                                 | 524                     | 523                           | 100                              | 16,009                | 11,981                | 134                          | 66                   | 72         | 37,024                     |
| <b>Total</b>                             | <b>2,435</b>            | <b>2,342</b>                  | <b>104</b>                       | <b>34,037</b>         | <b>24,851</b>         | <b>137</b>                   | <b>145</b>           | <b>121</b> | <b>92,373</b>              |

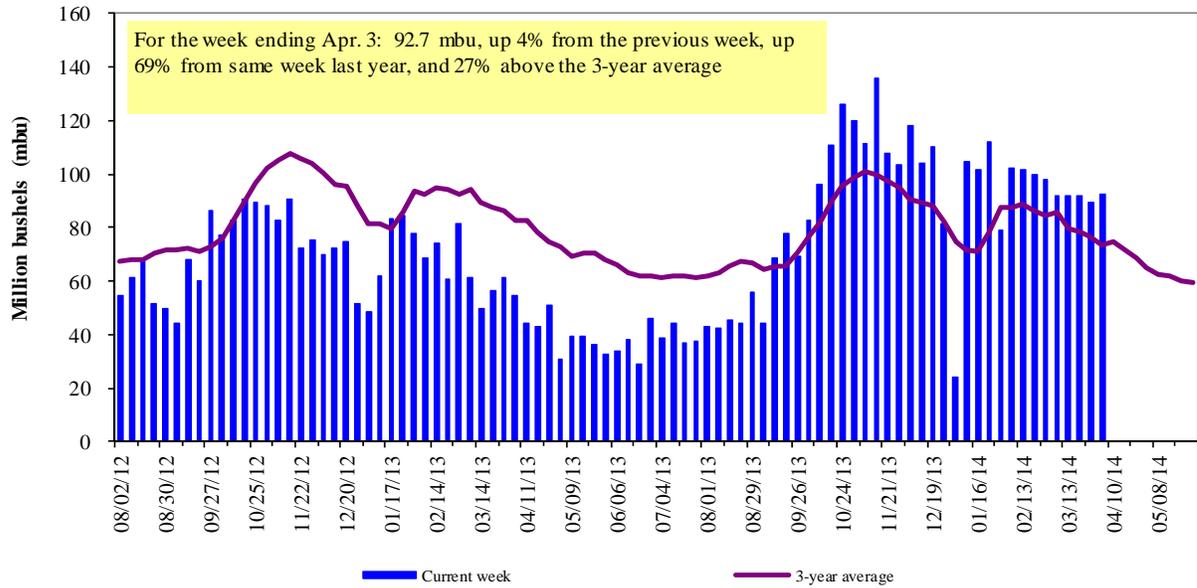
<sup>1</sup>Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

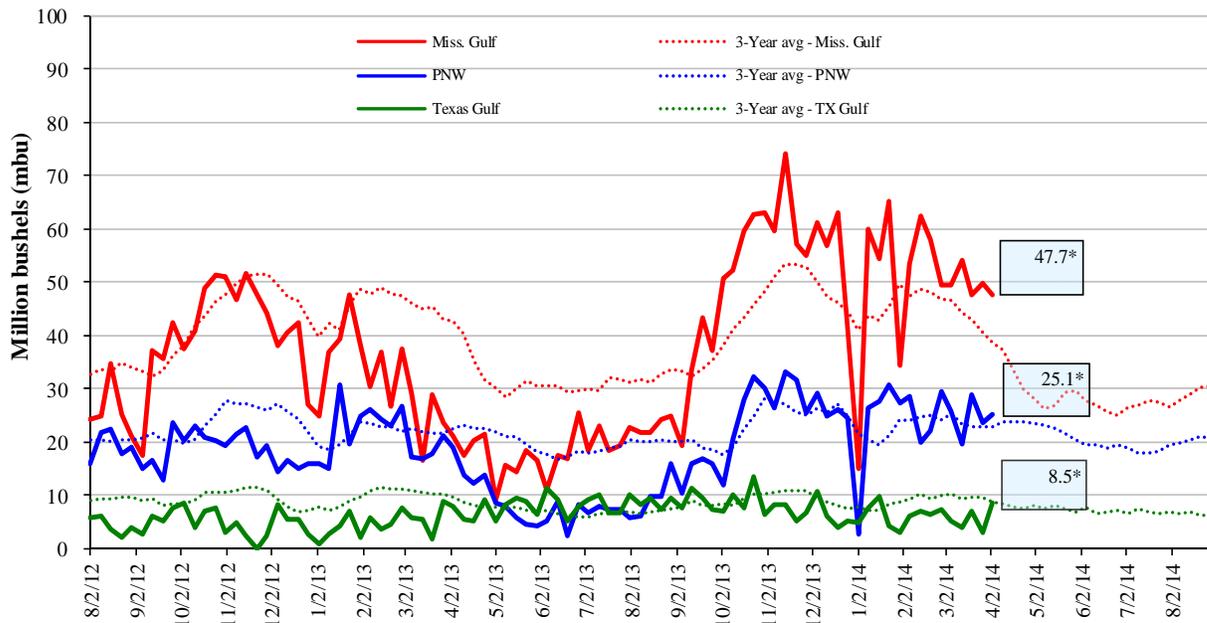


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

**U.S. Grain Inspections: U.S. Gulf and PNW<sup>1</sup> (wheat, corn, and soybeans)**



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

| <u>Apr. 3</u> : % change from: | <u>MSGulf</u> | <u>TX Gulf</u> | <u>U.S. Gulf</u> | <u>PNW</u> |
|--------------------------------|---------------|----------------|------------------|------------|
| Last week                      | down 5        | up 169         | up 6             | up 6       |
| Last year (same week)          | up 124        | up 4           | up 91            | up 31      |
| 3-yr avg. (4-wk mov. avg.)     | up 46         | up 6           | up 38            | up 13      |

# Ocean Transportation

Table 17

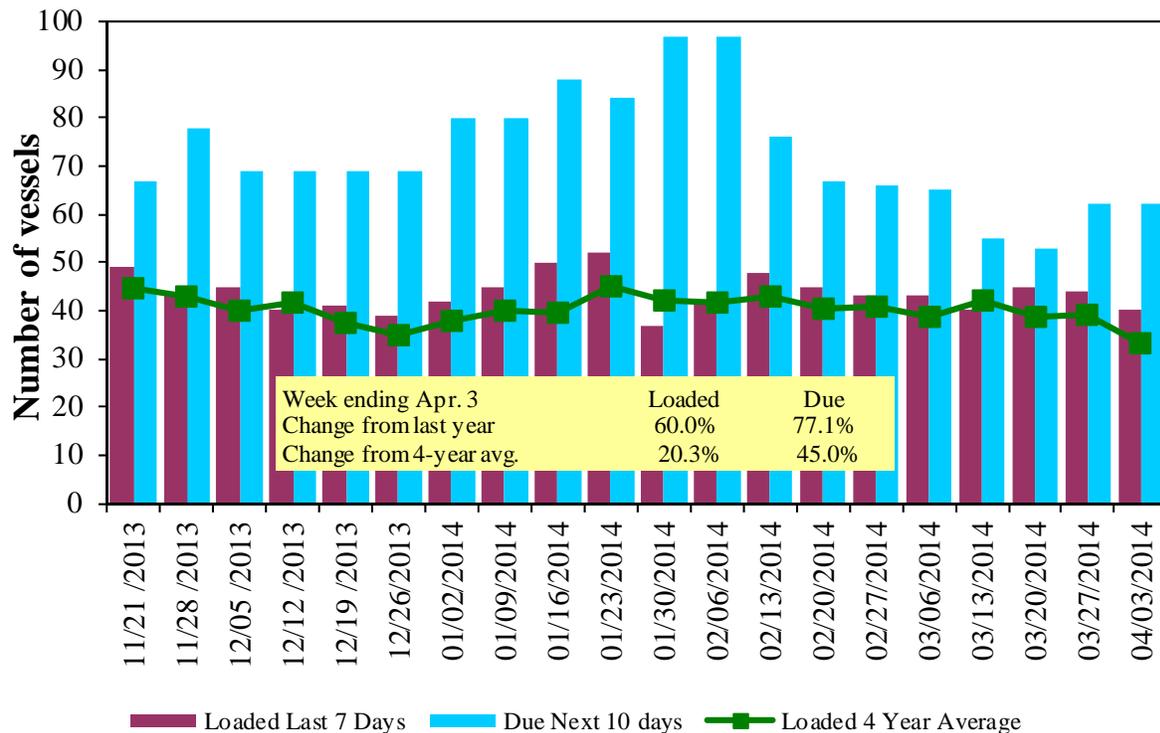
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

| Date       | Gulf     |               |                  | Pacific Northwest | Vancouver B.C. |
|------------|----------|---------------|------------------|-------------------|----------------|
|            | In port  | Loaded 7-days | Due next 10-days | In port           | In port        |
| 4/3/2014   | 66       | 40            | 62               | 18                | n/a            |
| 3/27/2014  | 63       | 44            | 62               | 14                | 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<sup>1</sup> Vessel Loading Activity**

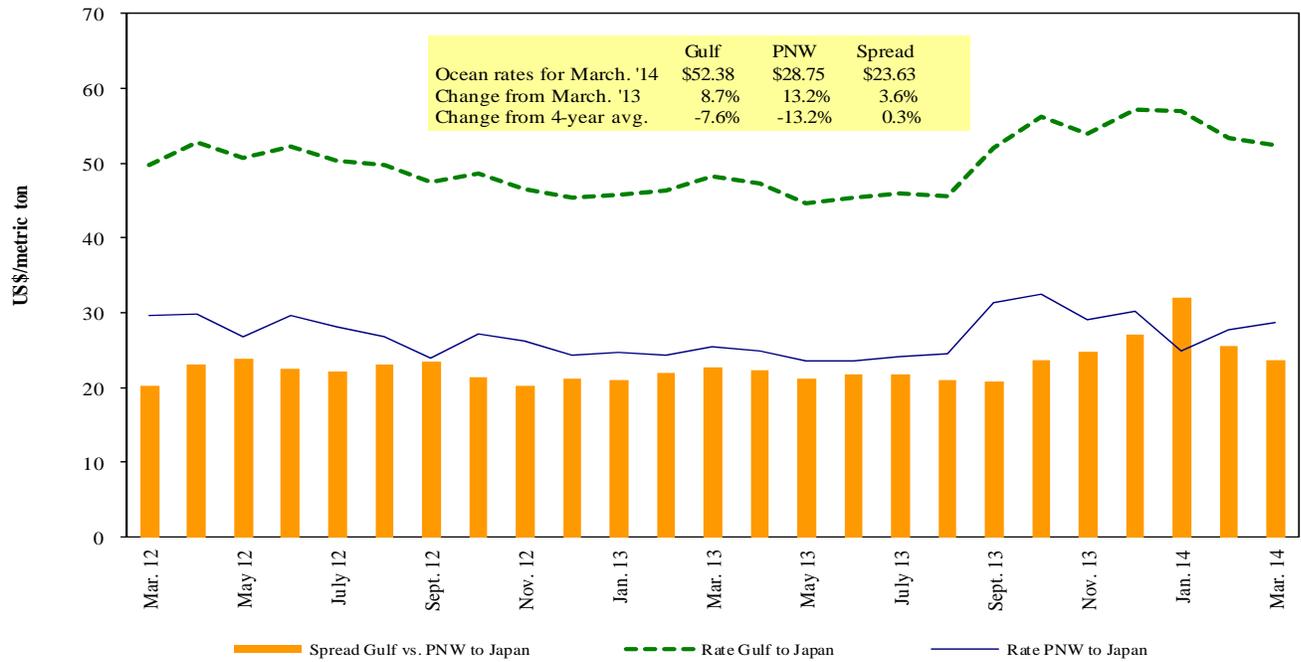


Source: Transportation & Marketing Programs/AMS/USDA

<sup>1</sup>U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

**Grain Vessel Rates, U.S. to Japan**



Source: O'Neil Commodity Consulting

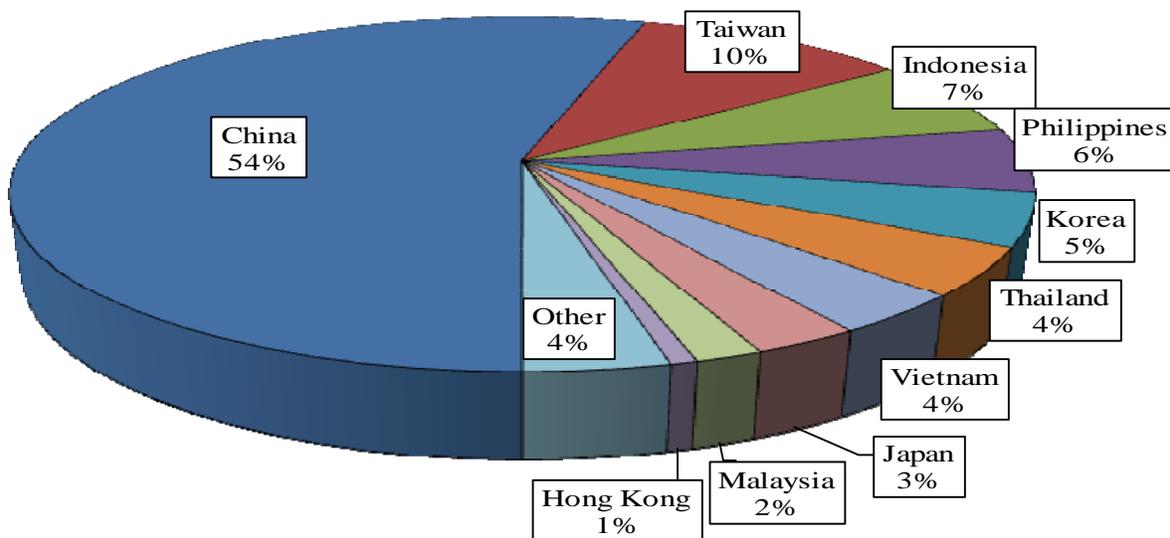
Table 18

**Ocean Freight Rates For Selected Shipments, Week Ending 4/5/2014**

| 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 <sup>1</sup> | Wheat        | Mar 24/Apr 4 | 16,100                     | 133.31                         |
| PNW           | Bangladesh            | Wheat        | Apr 22/May 1 | 13,900                     | 79.44                          |
| PNW           | Bangladesh            | Wheat        | Apr 22/May 1 | 11,150                     | 79.44                          |
| 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 15/24    | 60,000                     | 37.25                          |
| Brazil        | China                 | Heavy Grain  | Apr 15/30    | 60,000                     | 38.50                          |
| 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        | Egypt                 | Heavy Grain  | Apr 1/10     | 68,000                     | 25.00                          |
| Brazil        | Italy                 | Soybeans     | Mar 12/17    | 25,000                     | 32.00                          |
| Finland       | Algeria               | Barley       | Mar 5/10     | 25,000                     | 45.00                          |
| France        | Algeria               | Wheat        | Apr 5/10     | 23,000                     | 26.00                          |
| River Plate   | China                 | Heavy Grain  | Apr 12/30    | 65,000                     | 43.50                          |

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.

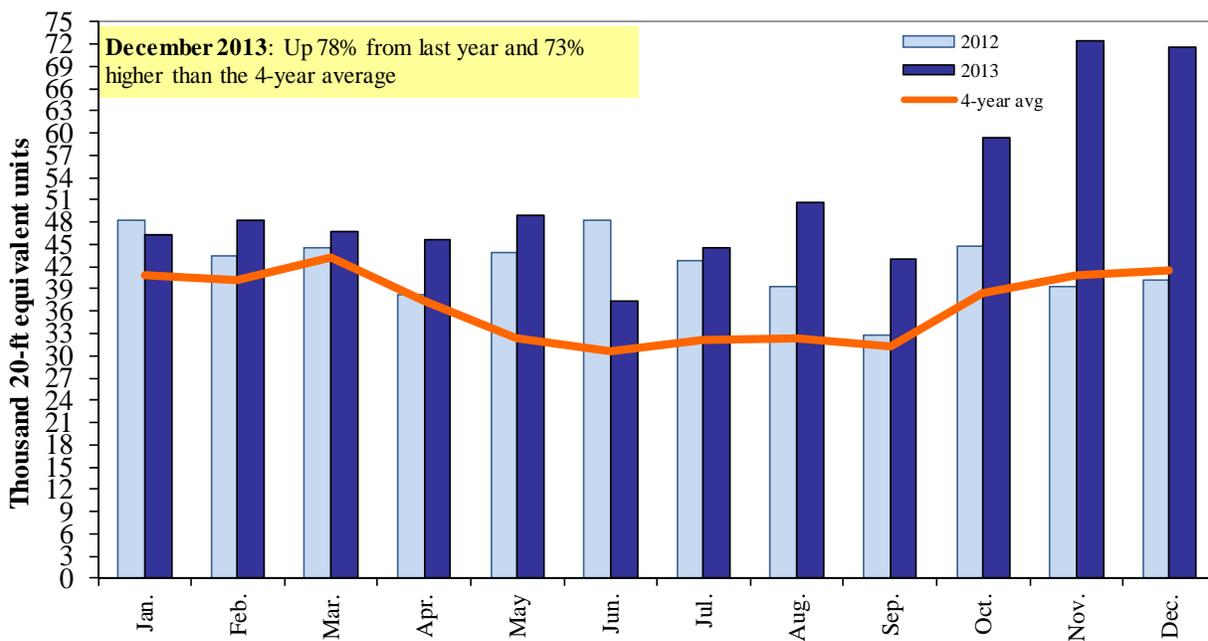
**Figure 18**  
**Top 10 Destination Markets for U.S. Containerized Grain Exports, December 2013**



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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