



Grain Transportation Report

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

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April 11, 2013

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WEEKLY HIGHLIGHTS

Upper Mississippi River Open for 2013

According to the U.S. Army Corps of Engineers, the first up-bound tow of the 2013 navigation season maneuvered through more than 12 to 16 inches of ice at Lake Pepin on the Mississippi River early April 8. Lake Pepin is the last part of the river to break up because the river is wider, so the current is slower there than it is at other reaches of the river. If a tow can make it through Lake Pepin, it can make it all the way to St. Paul, MN. The average opening date of the navigation season for the last 30 years has been March 20. Last year, the first up-bound tow to pass through Lake Pepin occurred on March 17.

2012/13 Marketing Year for Grain Marked by Two Historic Lows for Railcar Loadings

Of the top eight lowest weekly railroad grain car loadings since 1995, two have been during the past 7 months. The top six have all occurred during the week containing Christmas, when traditionally few railcar movements occur. The seventh lowest on record was the week ending September 8, 2012, when railroad grain car loadings were only 15,297—over 6,000 car loadings below the weekly September average between 1995 and 2011. The eighth lowest on record was during the week ending March 30, when U.S. railroads originated 15,388 **carloads of grain**, down 10 percent from last week, 28 percent from last year, and 32 percent from the 3-year average. Since September, weekly grain car loadings have averaged 3,700 car loadings below the 3-year average, mainly due to low grain exports.

Wheat Inspections Rebound

For the week ending April 4, the total amount of wheat inspected for export from all major export regions reached .740 million metric tons (mmt), up 4 percent from the past week and 52 percent above last year this time. Wheat inspections, destined primarily to Asia, increased 42 percent in the Pacific Northwest. Inspections of wheat were 12 percent above the 4-week running average. Total soybean inspections decreased 3 percent but were slightly above the 4-week running average. Total inspections of all major grains (corn, wheat, and soybeans) reached 1.41 mmt, down 14 percent from the past week as corn inspections (.257 mmt) dropped 48 percent. Outstanding (unshipped) export sales were down for each of the three major grains.

New Brazilian Truck Regulation May Hinder Grain Export

A new Brazilian law requiring truck drivers to rest 30 minutes every four hours, with a minimum of 11 hours of rest at night, is causing delays and early morning port congestion. The situation is compounded by rain delays and poor road conditions. Brazil is predicted to produce record corn and soybean crops this spring, and 70 percent of Brazil's soybean production moves by truck. According to a statement by the U.S. Grains Council, the cost of transporting a metric ton of soybeans from Mato Grosso over 4,435 miles to the port of Paranaguá has increased 506 percent in the past year. Within the same period, soybean prices have only risen by 20 percent, with three-quarters of the price increase absorbed by higher freight costs.

Snapshots by Sector

Rail

During the week ending April 4, average April non-shuttle **secondary railcar bids/offers per car** were \$3 below tariff, up \$2 from last week, and \$17 lower than last year. Average shuttle bids/offers were \$211 below tariff, down \$61 from last week, and \$7 lower than last year.

Ocean

During the week ending April 4, 25 **ocean-going grain vessels** were loaded in the Gulf, 11 percent less than the same period last year. Thirty-five vessels are expected to be loaded within the next 10 days, 5 percent less than the same period last year.

During the week ending April 5, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$47.50 per mt, 3 percent lower than the previous week. The cost of shipping from the Pacific Northwest to Japan was \$25 per mt, 4 percent lower than the previous week.

Barge

During the week ending April 6, **barge grain movements** totaled 288,200 tons, 20 percent lower than the previous week and 55.6 percent lower than the same period last year.

During the week ending April 6, 182 grain barges **moved down river**, down 27 percent from last week; 311 grain barges were **unloaded in New Orleans**, down 14.3 percent from the previous week.

Fuel

During the week ending April 8, U.S. average **diesel fuel prices** were down 2 cents from the previous week at \$3.98 per gallon—17 cents lower than the same week last year.

Feature Article/Calendar

AMS Releases A Comprehensive Rail Rate Index for Grain; Revises Agricultural Transportation Website

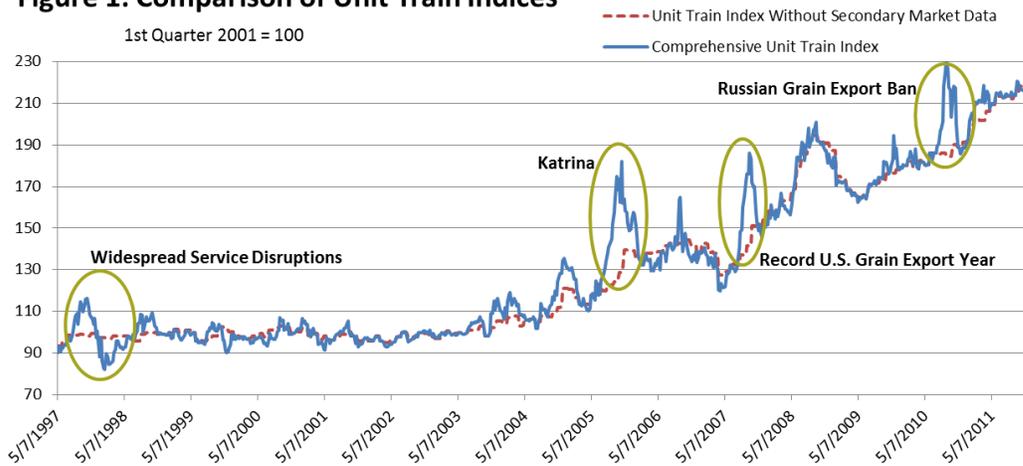
On April 10, USDA's Agricultural Marketing Service (AMS) released the research publication, [A Comprehensive Rail Rate Index for Grain](#). This research paper details the effort to more accurately represent grain transportation costs and analyzes how the different cost components have affected the rail transportation of grain. Between 2005 and 2011, grain rail prices for non-shuttle service increased 67 percent (inflation adjusted), but rates for shuttle service increased only 29 percent (inflation adjusted) between 2006 and 2011. These indices represent an improvement over previous measures of the price for grain rail service by incorporating secondary railcar market data, tariff rates, and fuel surcharges. The indices are also able to reflect distinct seasonal and market events. New index values are available each week in **Table 1**; past weekly index values are available in the [GTR datasets online](#).

A Comprehensive Rail Rate Index for Grain

This research publication is based on the updated rail rate indices from **Table 1** that were explained in the [March 8, 2012 GTR](#) feature article. The paper describes how the indices were developed and how they represent an improvement over the previous rail indicators by incorporating fuel surcharges, weekly secondary railcar market data, and tariff rates. The non-shuttle and shuttle indices are compared with each other and contrasted against railroad costs over the time period between 1997 and 2011. The main findings from the article are briefly summarized below.

Figure 1 illustrates two main points. First, rail prices are increasing after a long period of relatively flat rates. Up until about 2004, prices remained relatively flat before beginning an upward trend through the end of 2011. Second, the effects of the secondary railcar market affect the final transportation prices paid by shippers in addition to costs paid to railroads. Tariff rates and fuel surcharges alone do not capture the full price paid by shippers, especially during times of high demand or low supply. When the grain railcar market is especially tight, shippers pay a premium for service by bidding in the secondary railcar market.

Figure 1: Comparison of Unit Train Indices

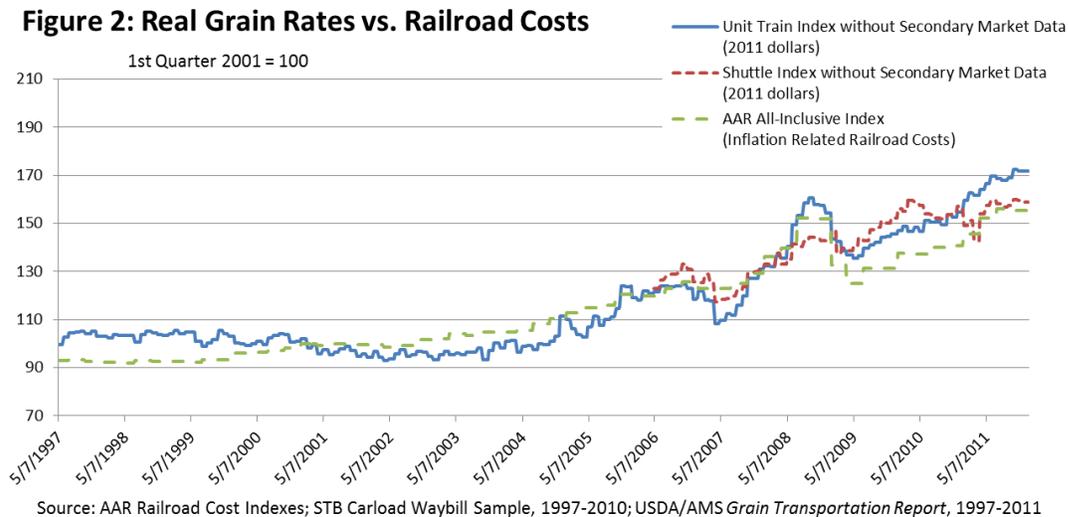


Source: USDA analysis of STB Carload Waybill Sample, 1997-2010; USDA/AMS Grain Transportation Report, 1997-2011

The red line in the graph shows only the prices shippers paid to rail carriers through tariffs and fuel surcharges. The blue line shows the full price shippers paid for rail service including

premiums in the secondary railcar market, tariffs, and fuel surcharges. For the majority of the time, there were few additional premiums as the lines closely followed one another. However, following the Union Pacific and Southern Pacific merger in 1996, widespread service disruptions were reflected by revenue gains and losses in the secondary railcar market. Other events that stressed the market for grain railcars include Hurricane Katrina in 2005, high railcar demand during record grain exports in 2007, and the Russian grain export ban in 2010, which greatly increased global demand for U.S. grain.

Figure 2 shows that railroad costs have closely mirrored prices charged to grain shippers until the recession in 2008/2009. Rail prices continued to climb for both unit train (including single car) and shuttle service, although shuttle prices leveled off in the latter half of 2010.



Agricultural Transportation Homepage

Over the next few months, AMS expects to release additional research publications on agricultural transportation. To improve access to these publications, AMS revised its Agricultural Transportation Research and Information Center on the [Agricultural Transportation](#) website. Under the “Agricultural Transportation Research and Information Center” tab, previous publications in addition to new staff publications and research papers will be published under these subheadings: Study of Rural Transportation Issues, Rail, Barge, Truck, Ocean Containerized, Ocean Bulk, and Additional Information. As new papers are published, they will be placed within the relevant category. During an article’s initial release, a “What’s New” tab will also provide a shortcut to the article in addition to the permanent link within the Agricultural Transportation Research and Information Center.

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Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
04/10/13	267	234	202	158	212	177
04/03/13	268	234	205	146	219	184

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

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

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

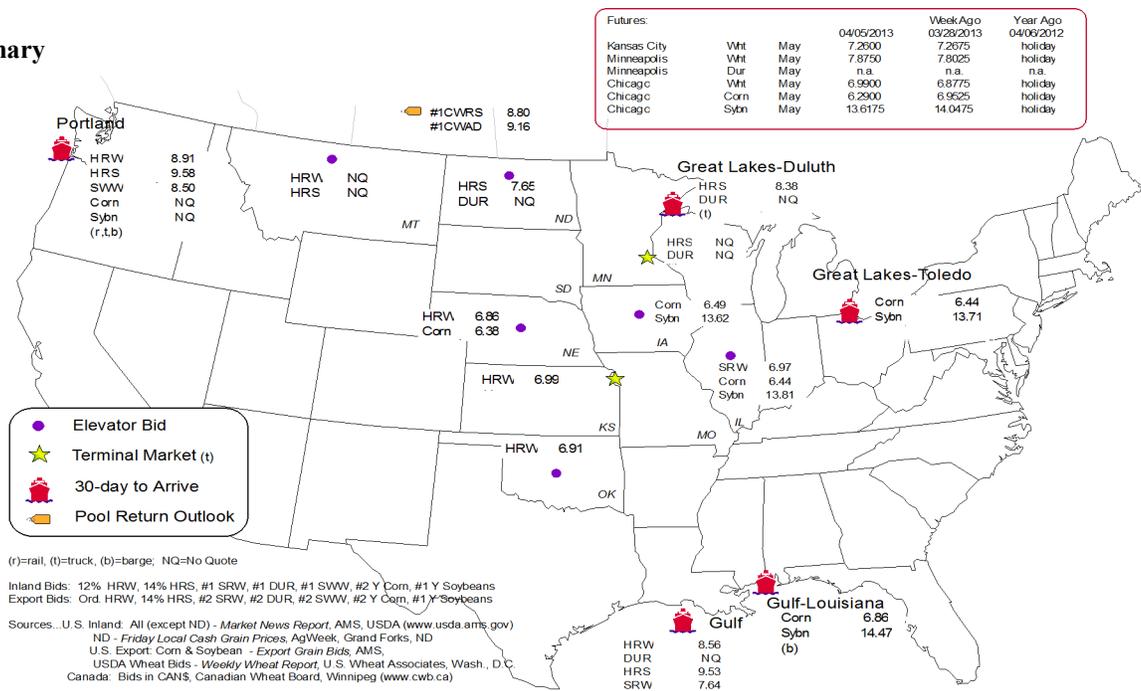
Commodity	Origin--Destination	4/5/2013	3/28/2013
Corn	IL--Gulf	-0.42	-0.48
Corn	NE--Gulf	-0.48	-0.54
Soybean	IA--Gulf	-0.85	-0.78
HRW	KS--Gulf	-1.57	-1.62
HRS	ND--Portland	-1.93	-2.11

Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 1
Grain bid Summary



Rail Transportation

Table 3

Rail Deliveries to Port (carloads)¹

Week ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border
	Gulf	Texas Gulf	Northwest	East Gulf			Mexico ³
04/03/2013 ^p	185	1,044	2,897	124	4,250	03/30/13	1,303
03/27/2013 ^r	1	1,272	3,597	149	5,019	03/23/13	1,493
2013 YTD ^r	7,767	12,428	56,619	7,989	84,803	2013 YTD	15,734
2012 YTD ^r	3,417	9,820	64,539	7,036	84,812	2012 YTD	29,558
2013 YTD as % of 2012 YTD	227	127	88	114	100	% change YTD	53
Last 4 weeks as % of 2012 ²	52	157	74	40	81	Last 4wks % 2012	53
Last 4 weeks as % of 4-year avg. ²	16	78	86	31	73	Last 4wks % 4 yr	65
Total 2012	22,604	40,780	199,419	32,648	287,462	Total 2011	97,118
Total 2011	27,358	77,515	191,187	24,088	320,148	Total 2010	90,175

¹ Data is incomplete as it is voluntarily provided

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

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

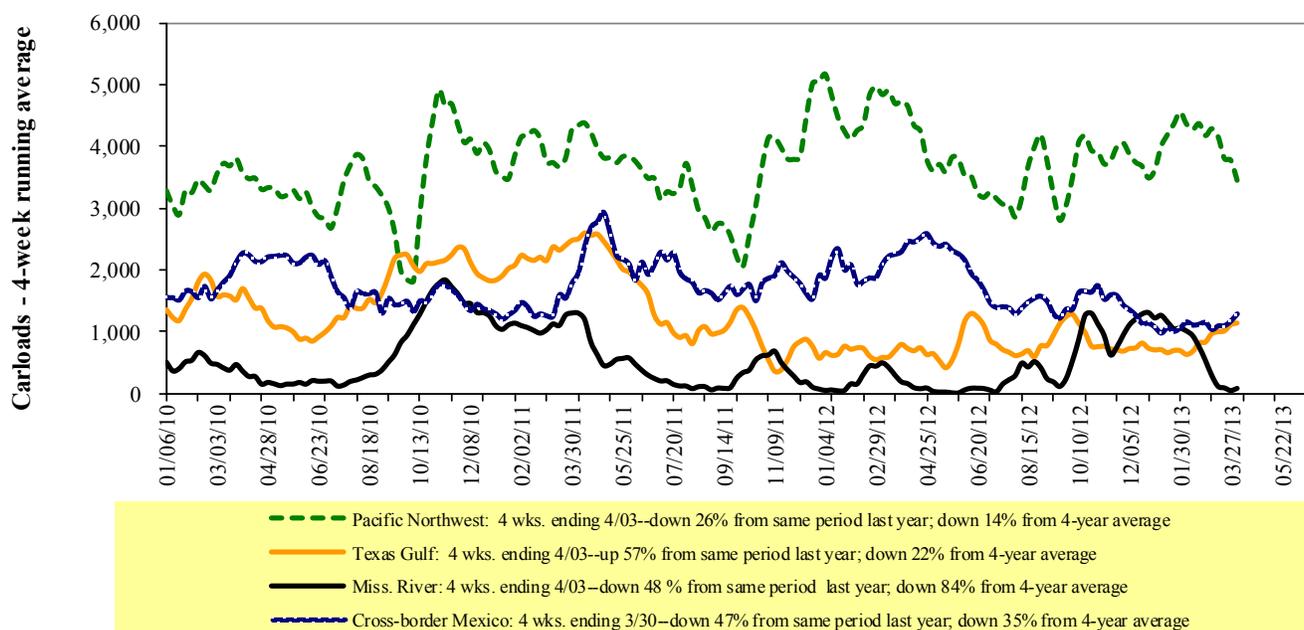
YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

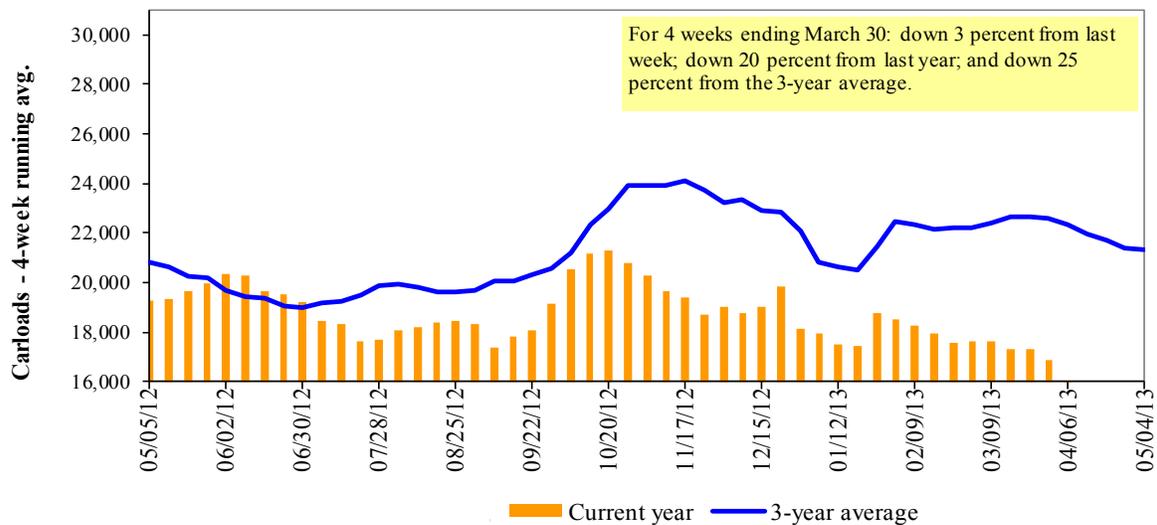
Table 4

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

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
03/30/13	846	2,215	8,158	201	3,968	15,388	2,492	4,814
This week last year	2,068	2,668	11,216	253	5,071	21,276	3,751	6,454
2013 YTD	19,590	33,005	121,452	6,083	49,777	229,907	43,930	67,969
2012 YTD	28,332	37,649	134,538	6,196	66,827	273,542	48,886	67,694
2013 YTD as % of 2012 YTD	69	88	90	98	74	84	90	100
Last 4 weeks as % of 2012	61	85	83	93	78	80	79	94
Last 4 weeks as % of 3-yr avg. ¹	60	76	81	69	70	75	70	98
Total 2012	85,384	145,336	515,638	26,936	244,077	1,017,371	204,068	266,266

¹As a percent of the same period in 2009 and the prior 3-year average. YTD = year-to-date.

Source: Association of American Railroads (www.aar.org)

Figure 3**Total Weekly U.S. Class I Railroad Grain Car Loadings**

Source: Association of American Railroads

Table 5

Railcar Auction Offerings¹ (\$/car)²

Week ending	Delivery period							
	Apr-13	Apr-12	May-13	May-12	Jun-13	Jun-12	Jul-13	Jul-12
BNSF ³								
COT grain units	0	0	no bids	no bids	no bids	0	0	no bids
COT grain single-car ⁵	0	no bids	0 . . 5	0	no bids	0 . . 2	no bids	0 . . 1
UP ⁴								
GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	no bids	1	no bids	no bids	no bids	no bids	n/a	n/a

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

²Average premium/discount to tariff, last auction

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

⁴UP - GCAS = Grain Car Allocation System

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

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

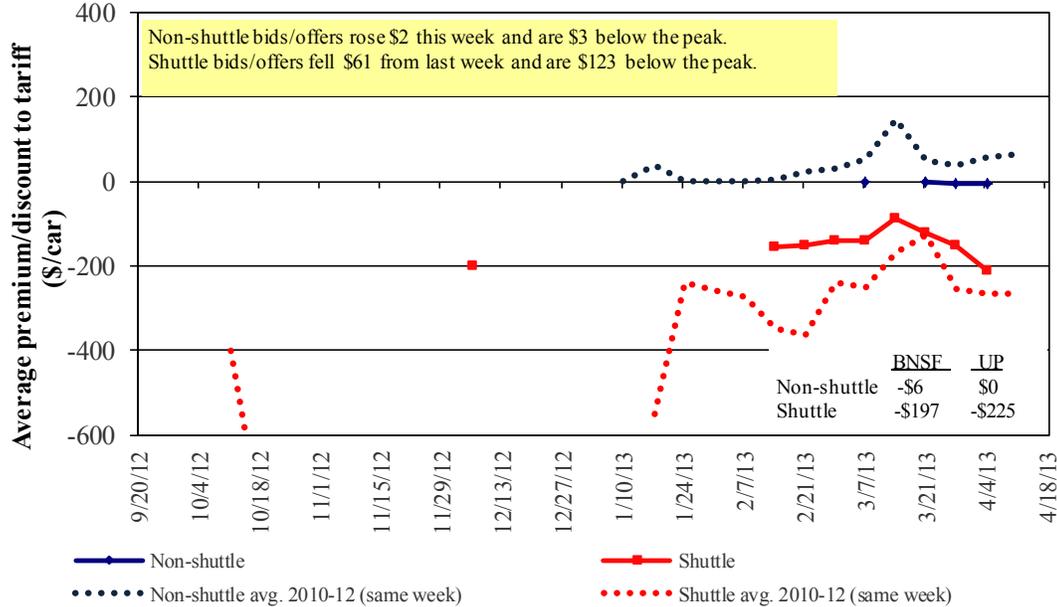
⁵Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

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

Figure 4

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

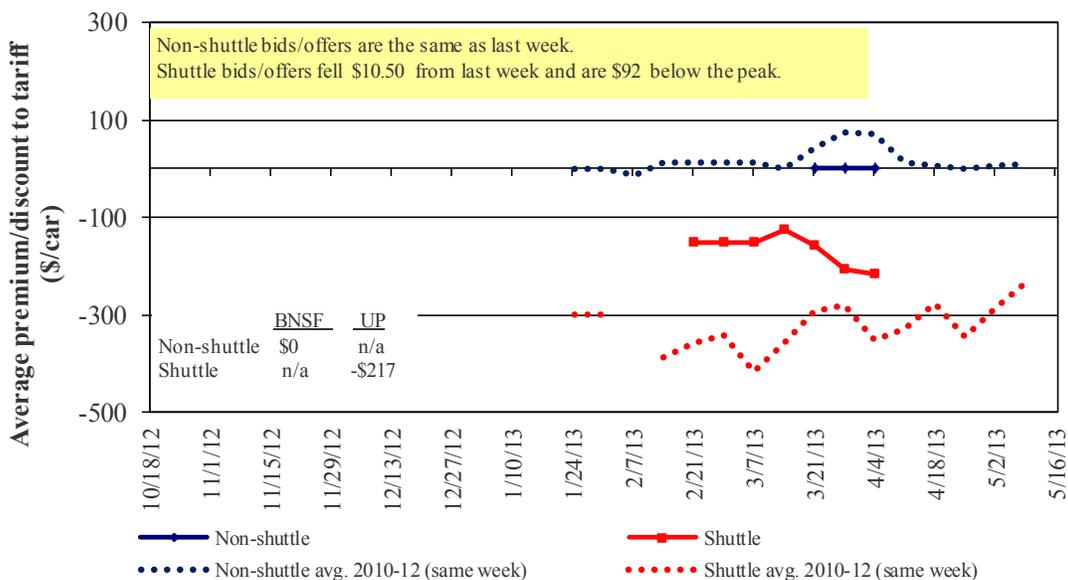


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

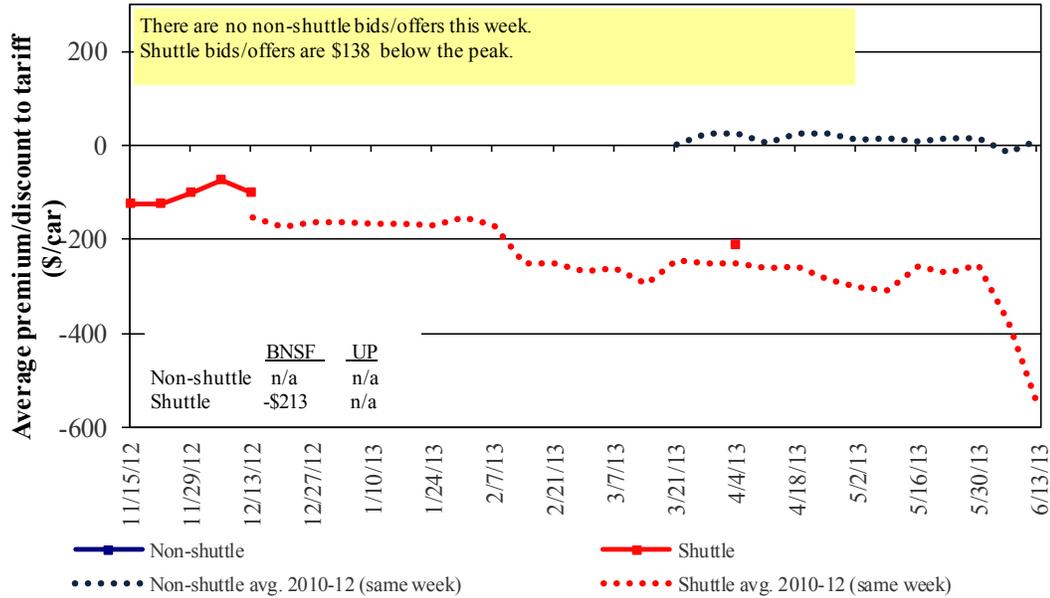


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

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



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 6

Weekly Secondary Railcar Market (\$/car)¹

Week ending	Delivery period					
	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13
Non-shuttle						
BNSF-GF	(6)	-	n/a	n/a	n/a	n/a
Change from last week	4	-	n/a	n/a	n/a	n/a
Change from same week 2011	(16)	n/a	n/a	n/a	n/a	n/a
UP-Pool	-	n/a	n/a	n/a	n/a	n/a
Change from last week	-	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	(18)	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	(197)	n/a	(213)	n/a	n/a	n/a
Change from last week	(72)	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	61	n/a	n/a	n/a	n/a	n/a
UP-Pool	(225)	(217)	n/a	n/a	(150)	(150)
Change from last week	(50)	(17)	n/a	n/a	-	(25)
Change from same week 2011	(75)	158	n/a	n/a	n/a	n/a

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

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

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,

n/a = not available; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

Data from Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

Effective date:				Fuel	Tariff plus surcharge per:		Percent
4/1/2013	Origin region*	Destination region*	Tariff rate/car	surcharge per car	metric ton	bushe ²	change Y/Y ³
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,144	\$207	\$33.28	\$0.91	5
	Grand Forks, ND	Duluth-Superior, MN	\$3,543	\$122	\$36.40	\$0.99	9
	Wichita, KS	Los Angeles, CA	\$6,026	\$627	\$66.07	\$1.80	3
	Wichita, KS	New Orleans, LA	\$3,645	\$365	\$39.82	\$1.08	5
	Sioux Falls, SD	Galveston-Houston, TX	\$5,573	\$515	\$60.46	\$1.65	1
	Northwest KS	Galveston-Houston, TX	\$3,912	\$400	\$42.82	\$1.17	4
	Amarillo, TX	Los Angeles, CA	\$4,112	\$556	\$46.36	\$1.26	4
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,110	\$412	\$34.98	\$0.95	3
	Toledo, OH	Raleigh, NC	\$4,508	\$459	\$49.32	\$1.34	3
	Des Moines, IA	Davenport, IA	\$2,006	\$87	\$20.79	\$0.57	4
	Indianapolis, IN	Atlanta, GA	\$3,920	\$345	\$42.35	\$1.15	3
	Indianapolis, IN	Knoxville, TN	\$3,354	\$221	\$35.50	\$0.97	3
	Des Moines, IA	Little Rock, AR	\$3,154	\$257	\$33.87	\$0.92	3
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,065	\$747	\$57.72	\$1.57	2
	Minneapolis, MN	New Orleans, LA	\$3,474	\$454	\$39.01	\$1.06	7
	Toledo, OH	Huntsville, AL	\$3,575	\$326	\$38.74	\$1.05	3
	Indianapolis, IN	Raleigh, NC	\$4,578	\$462	\$50.05	\$1.36	3
	Indianapolis, IN	Huntsville, AL	\$3,267	\$221	\$34.64	\$0.94	-6
Champaign-Urbana, IL	New Orleans, LA	\$3,599	\$412	\$39.84	\$1.08	7	
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,580	\$361	\$39.13	\$1.07	7
	Wichita, KS	Galveston-Houston, TX	\$3,634	\$281	\$38.88	\$1.06	12
	Chicago, IL	Albany, NY	\$3,771	\$430	\$41.72	\$1.14	4
	Grand Forks, ND	Portland, OR	\$5,061	\$623	\$56.45	\$1.54	5
	Grand Forks, ND	Galveston-Houston, TX	\$6,082	\$649	\$66.84	\$1.82	5
	Northwest KS	Portland, OR	\$4,880	\$656	\$54.97	\$1.50	4
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$759	\$55.20	\$1.50	1
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$695	\$54.17	\$1.47	1
	Champaign-Urbana, IL	New Orleans, LA	\$2,929	\$412	\$33.18	\$0.90	3
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$405	\$36.89	\$1.00	1
	Des Moines, IA	Amarillo, TX	\$3,510	\$323	\$38.06	\$1.04	3
	Minneapolis, MN	Tacoma, WA	\$4,800	\$753	\$55.14	\$1.50	1
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,200	\$779	\$49.44	\$1.35	2
	Sioux Falls, SD	Tacoma, WA	\$5,320	\$695	\$59.73	\$1.63	6
	Minneapolis, MN	Portland, OR	\$5,330	\$759	\$60.47	\$1.65	7
	Fargo, ND	Tacoma, WA	\$5,230	\$618	\$58.07	\$1.58	7
	Council Bluffs, IA	New Orleans, LA	\$3,950	\$476	\$43.95	\$1.20	7
	Toledo, OH	Huntsville, AL	\$2,750	\$326	\$30.55	\$0.83	3
Grand Island, NE	Portland, OR	\$5,195	\$671	\$58.25	\$1.59	2	

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

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

³Percentage change year over year calculated using tariff rate plus fuel surcharge

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

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

Table 8

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

Effective date: 4/1/2013

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel	Tariff plus surcharge per:		Percent change Y/Y ⁴
				surcharge per car ²	metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$6,262	\$659	\$70.72	\$1.92	-17
	OK	Cautitlan, EM	\$6,552	\$801	\$75.13	\$2.04	-1
	KS	Guadalajara, JA	\$7,444	\$774	\$83.97	\$2.28	-1
	TX	Salinas Victoria, NL	\$3,553	\$302	\$39.39	\$1.07	-3
Corn	IA	Guadalajara, JA	\$7,699	\$910	\$87.96	\$2.23	0
	SD	Celaya, GJ ⁵	\$7,356	\$863	\$83.98	\$2.13	n/a
	NE	Queretaro, QA	\$7,153	\$808	\$81.35	\$2.06	1
	SD	Salinas Victoria, NL	\$5,700	\$656	\$64.94	\$1.65	2
	MO	Tlalhepantla, EM	\$6,592	\$785	\$75.37	\$1.91	5
	SD	Torreon, CU	\$6,522	\$722	\$74.02	\$1.88	1
Soybeans	MO	Bojay (Tula), HG	\$7,580	\$768	\$85.29	\$2.32	7
	NE	Guadalajara, JA	\$8,134	\$878	\$92.08	\$2.50	2
	IA	El Castillo, JA	\$8,555	\$857	\$96.17	\$2.61	4
	KS	Torreon, CU	\$6,651	\$544	\$73.52	\$2.00	2
Sorghum	TX	Guadalajara, JA	\$6,464	\$561	\$71.78	\$1.82	-2
	NE	Celaya, GJ ⁵	\$6,997	\$783	\$79.49	\$2.02	n/a
	KS	Queretaro, QA	\$6,815	\$492	\$74.66	\$1.89	5
	NE	Salinas Victoria, NL	\$5,438	\$576	\$61.44	\$1.56	6
	NE	Torreon, CU	\$6,153	\$643	\$69.44	\$1.76	1

¹Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75–110 cars that meet railroad efficiency requirements.

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

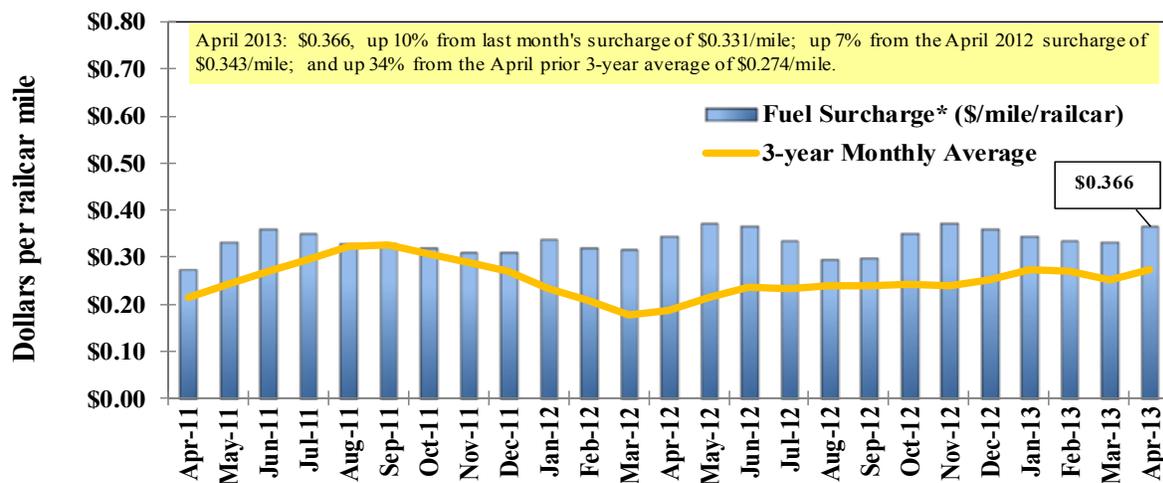
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹

¹ Weighted by each Class I railroad's proportion of grain traffic for the prior year.

* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

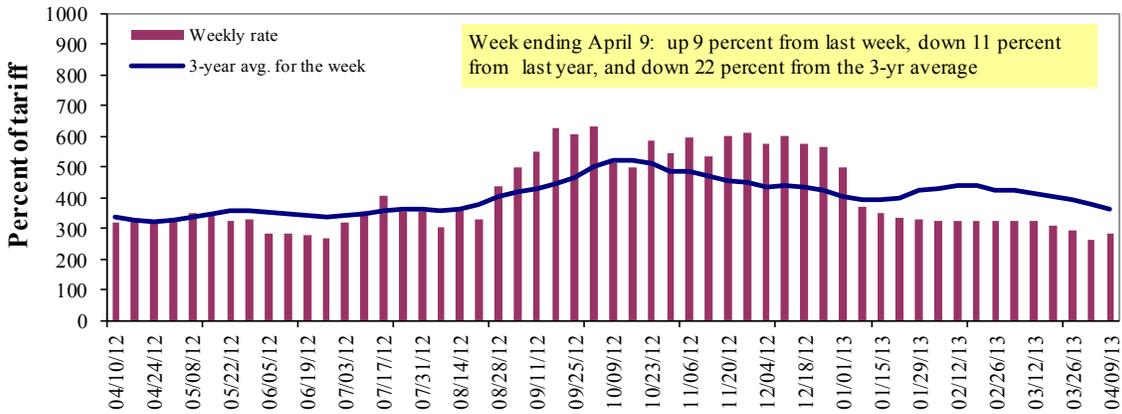
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

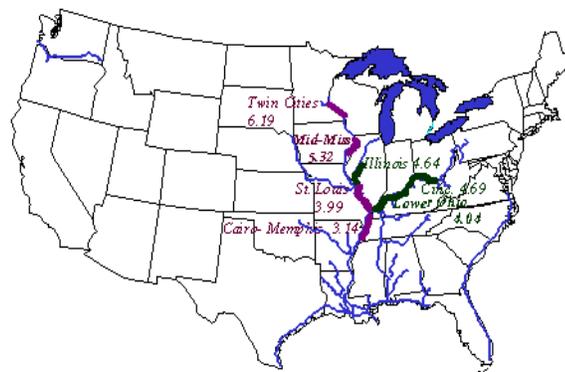
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid- Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo- Memphis
Rate¹	4/9/2013	355	293	285	228	198	198	180
	4/2/2013	-	290	263	233	194	194	180
\$/ton	4/9/2013	21.97	15.59	13.22	9.10	9.29	8.00	5.65
	4/2/2013	-	15.43	12.20	9.30	9.10	7.84	5.65
Current week % change from the same week:								
	Last year	-17	-19	-11	-4	-30	-30	-13
	3-year avg. ²	-17	-6	-22	-15	-40	-40	-25
Rate¹	May	340	285	265	225	200	200	180
	July	350	295	280	245	228	228	200

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

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9
Benchmark tariff rates



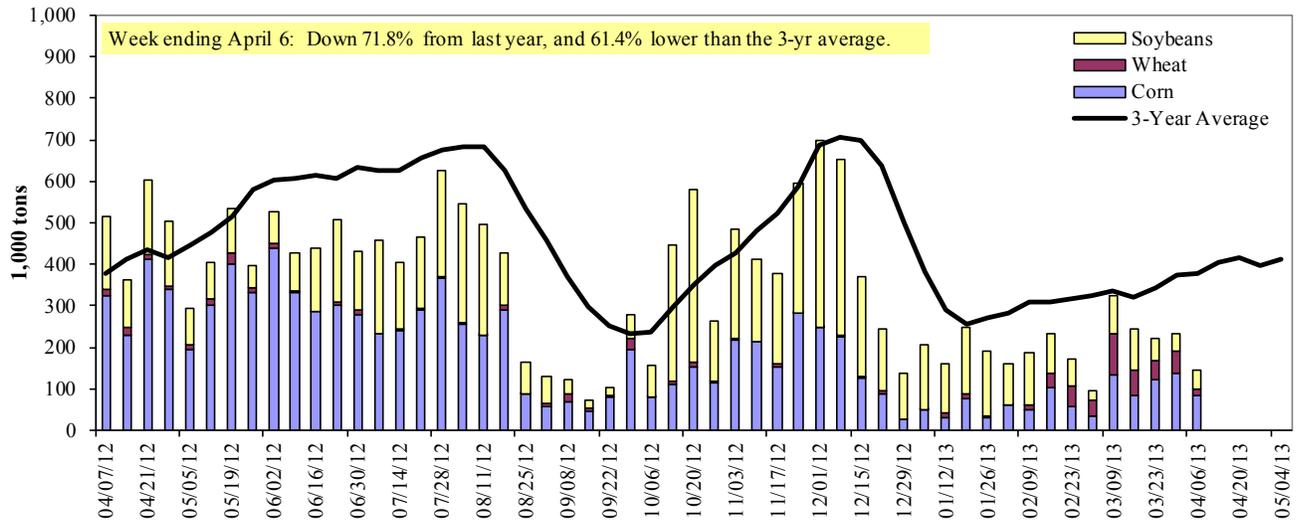
Calculating barge rate per ton:

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

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

Figure 10

Barge Movements on the Mississippi River¹ (Locks 27 - Granite City, IL)



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

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

Week ending 4/06/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	6	0	2	0	8
Winfield, MO (L25)	30	3	38	0	71
Alton, IL (L26)	77	11	44	0	133
Granite City, IL (L27)	85	13	47	5	149
Illinois River (L8)					
	5	11	5	0	20
Ohio River (L52)					
	57	12	39	2	109
Arkansas River (L1)					
	0	27	1	1	29
Weekly total - 2013	142	51	87	8	288
Weekly total - 2012	389	39	217	4	648
2013 YTD ¹	1,701	1,187	3,001	85	5,974
2012 YTD	4,985	451	3,318	95	8,849
2013 as % of 2012 YTD	34	263	90	89	68
Last 4 weeks as % of 2012 ²	40	42	55	81	57
Total 2012	14,837	1,794	12,663	229	29,523

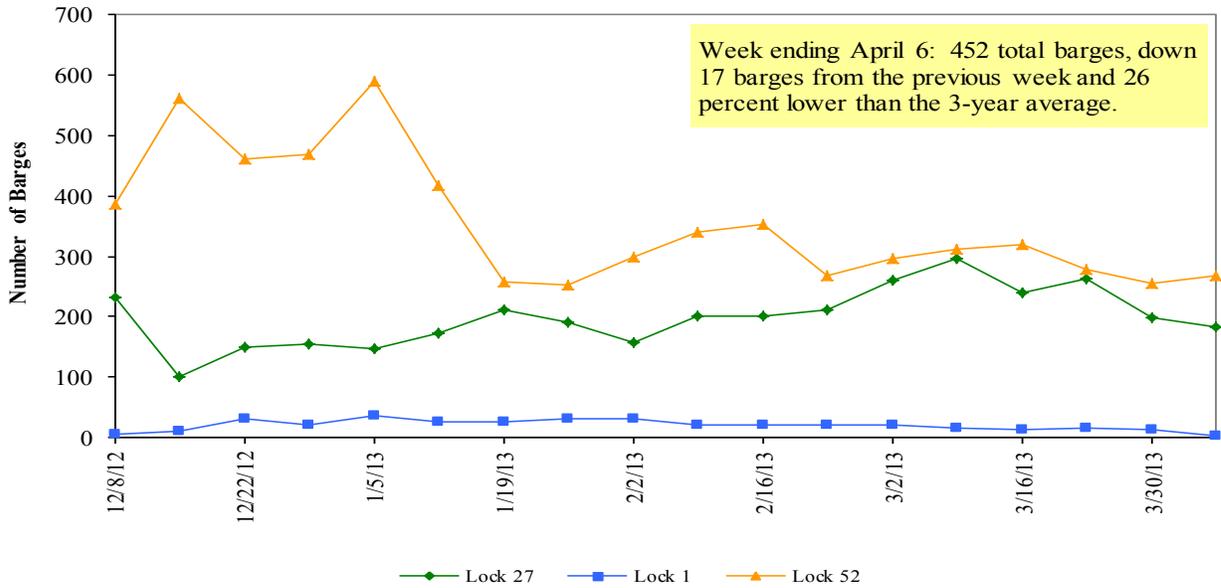
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2012.

Note: Total may not add exactly, due to rounding

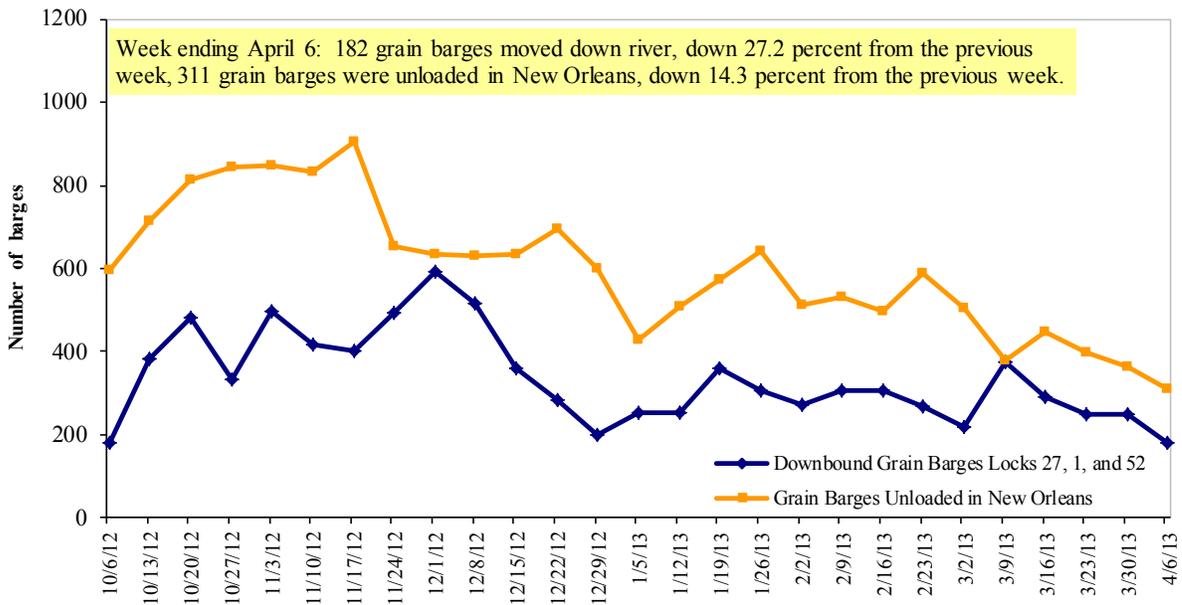
Source: U.S. Army Corps of Engineers

Figure 11
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



Source: U.S. Army Corps of Engineers

Figure 12
Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices¹, Week Ending 4/08/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.009	-0.016	-0.181
	New England	4.134	-0.014	-0.144
	Central Atlantic	4.062	-0.021	-0.220
	Lower Atlantic	3.946	-0.012	-0.160
II	Midwest ²	3.956	-0.014	-0.099
III	Gulf Coast ³	3.888	-0.027	-0.175
IV	Rocky Mountain	3.899	-0.023	-0.230
V	West Coast	4.117	0.001	-0.294
	West Coast less California	4.023	0.007	-0.354
	California	4.196	-0.004	-0.244
Total	U.S.	3.977	-0.016	-0.171

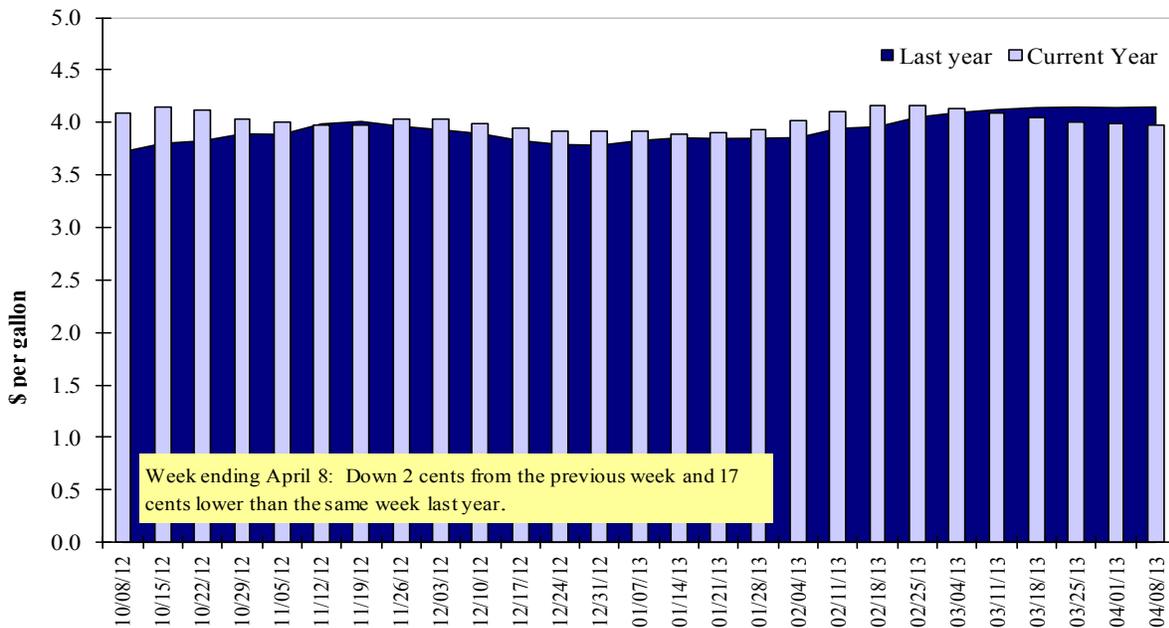
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

²Same as North Central ³Same as South Central

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

Figure 13

Weekly Diesel Fuel Prices, U.S. Average



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

Grain Exports

Table 12

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

Week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances¹									
3/28/2013	1,987	1,070	1,218	653	78	5,006	4,306	3,122	12,434
This week year ago	1,123	885	1,057	1,357	56	4,478	10,064	4,595	19,137
Cumulative exports-marketing year²									
2012/13 YTD	7,566	3,933	4,670	3,869	390	20,427	11,214	32,942	64,583
2011/12 YTD	8,225	2,977	5,377	4,372	392	21,344	24,003	27,125	72,472
YTD 2012/13 as % of 2011/12	92	132	87	88	99	96	47	121	89
Last 4 wks as % of same period 2011/12	171	150	116	53	169	118	46	75	70
2011/12 Total	9,904	4,319	6,312	5,601	491	26,627	37,900	36,727	101,254
2010/11 Total	15,837	2,828	8,623	4,717	979	32,984	44,569	39,753	117,306

¹ Current unshipped export sales to date

² Shipped export sales to date; new marketing year begins for corn and soybeans

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

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

Table 13

Top 5 Importers¹ of U.S. Corn

Week ending 03/28/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	5,407	9,424	(43)	12,367
Mexico	3,620	8,629	(58)	9,617
China	2,473	4,197	(41)	5,414
Korea	358	3,415	(90)	3,639
Venezuela	538	737	(27)	1,332
Top 5 Importers	12,395	26,402	(53)	32,369
Total US corn export sales	15,520	34,066	(54)	39,180
% of Projected	76%	87%		
Change from prior week	354	938		
Top 5 importers' share of U.S. corn export sales	80%	78%		83%
USDA forecast, April 2013	20,320	39,180	(48)	
Corn Use for Ethanol USDA forecast, Ethanol April 2013	115,570	127,000	(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 (Carry-over plus Accumulated Exports)

Table 14

Top 5 Importers¹ of U.S. Soybeans

Week Ending 03/28/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	21,762	20,877	4	24,602
Mexico	2,113	2,425	(13)	3,180
Japan	1,467	1,475	(1)	1,891
Indonesia	1,225	1,186	3	1,741
Egypt	649	804	(19)	1,292
Top 5 importers	27,216	26,767	2	32,706
Total US soybean export sales	36,064	31,720	14	37,060
% of Projected	98%	86%		
Change from prior week	393	407		
Top 5 importers' share of U.S. soybean export sales	75%	84%		
USDA forecast, April 2013	36,740	37,060	(1)	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
http://www.fas.usda.gov/esrquery/³ FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

Week Ending 03/28/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	3,463	3,487	(0.7)	3,512
Mexico	2,749	3,345	(18)	3,496
Nigeria	2,766	3,050	(9)	3,248
Philippines	1,821	1,976	(8)	2,039
Korea	1,375	1,916	(28)	1,983
Egypt	1,476	681	117	950
Taiwan	988	870	14	888
Indonesia	435	761	(43)	830
Venezuela	615	643	(4)	594
Iraq	209	572	(63)	572
Top 10 importers	15,897	17,301	(8)	18,111
Total US wheat export sales	25,433	25,822	(2)	28,560
% of Projected	91%	90%		
Change from prior week	141	408		
Top 10 importers' share of U.S. wheat export sales	63%	67%		63%
USDA forecast, April 2013	27,900	28,560	(2)	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--http://www.fas.usda.gov/esrquery/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 04/04/13	Previous Week ¹	Current Week as % of Previous	2013 YTD ¹	2012 YTD ¹	2013 YTD as % of 2012 YTD	Last 4-weeks as % of		Total ¹ 2012
							2012	3-yr. avg.	
Pacific Northwest									
Wheat	230	162	142	3,325	3,441	97	111	107	12,625
Corn	54	109	50	1,159	1,802	64	59	53	5,512
Soybeans	193	300	65	3,551	3,562	100	71	78	10,347
Total	478	571	84	8,036	8,805	91	82	81	28,484
Mississippi Gulf									
Wheat	234	276	85	2,526	1,637	154	151	161	5,462
Corn	168	307	55	2,816	6,075	46	76	46	18,068
Soybeans	164	39	416	6,391	7,296	88	40	39	24,684
Total	567	623	91	11,734	15,008	78	74	59	48,215
Texas Gulf									
Wheat	221	241	92	1,724	1,304	132	179	81	5,912
Corn	0	0	n/a	42	204	21	31	22	336
Soybeans	0	0	n/a	122	0	n/a	n/a	0	626
Total	221	241	92	1,888	1,509	125	143	69	6,874
Interior									
Wheat	17	13	132	250	324	77	129	66	1,218
Corn	34	80	43	692	2,392	29	138	36	6,115
Soybeans	45	83	54	1,207	1,260	96	60	90	4,204
Total	95	176	54	2,149	3,975	54	46	55	11,538
Great Lakes									
Wheat	37	0	n/a	45	9	507	475	120	481
Corn	0	0	n/a	0	14	0	n/a	0	56
Soybeans	0	0	n/a	4	2	154	33	98	713
Total	37	0	n/a	49	26	190	408	120	1,250
Atlantic									
Wheat	1	17	8	297	2	n/a	n/a	258	341
Corn	0	0	n/a	2	50	4	n/a	0	143
Soybeans	14	7	193	627	407	154	51	70	1,460
Total	15	24	63	926	458	202	129	115	1,944
U.S. total from ports²									
Wheat	740	709	104	8,167	6,717	122	138	112	26,040
Corn	257	497	52	4,712	10,537	45	60	44	30,230
Soybeans	416	429	97	11,902	12,527	95	57	59	42,035
Total	1,413	1,635	86	24,781	29,780	83	79	67	98,305

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

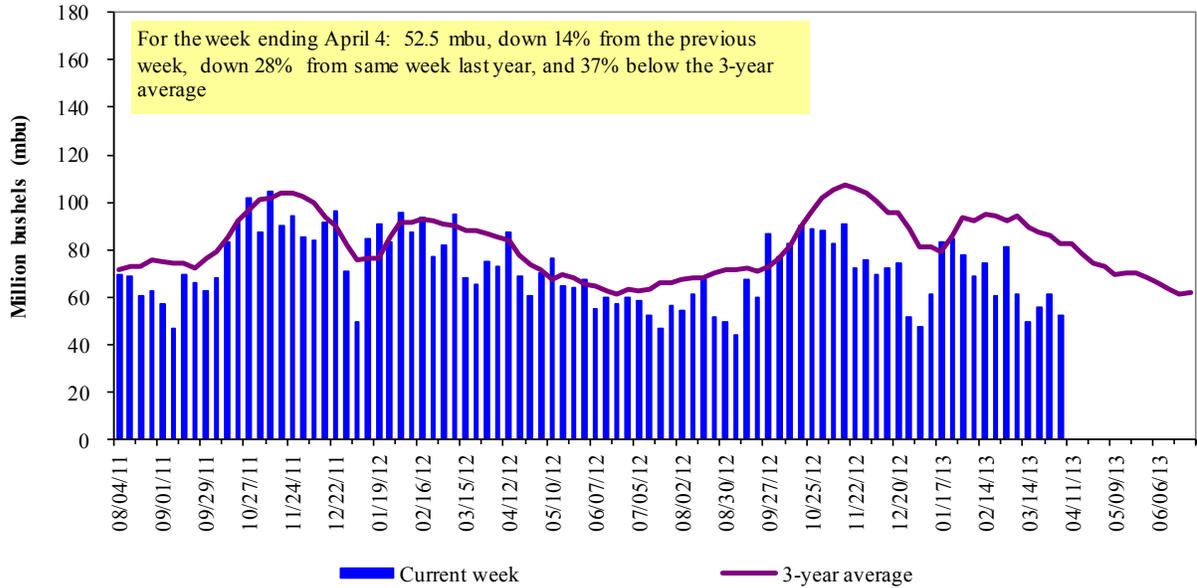
² Total includes only port regions shown above; Interior land-based shipments now included.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 56 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2012.

Figure 14

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

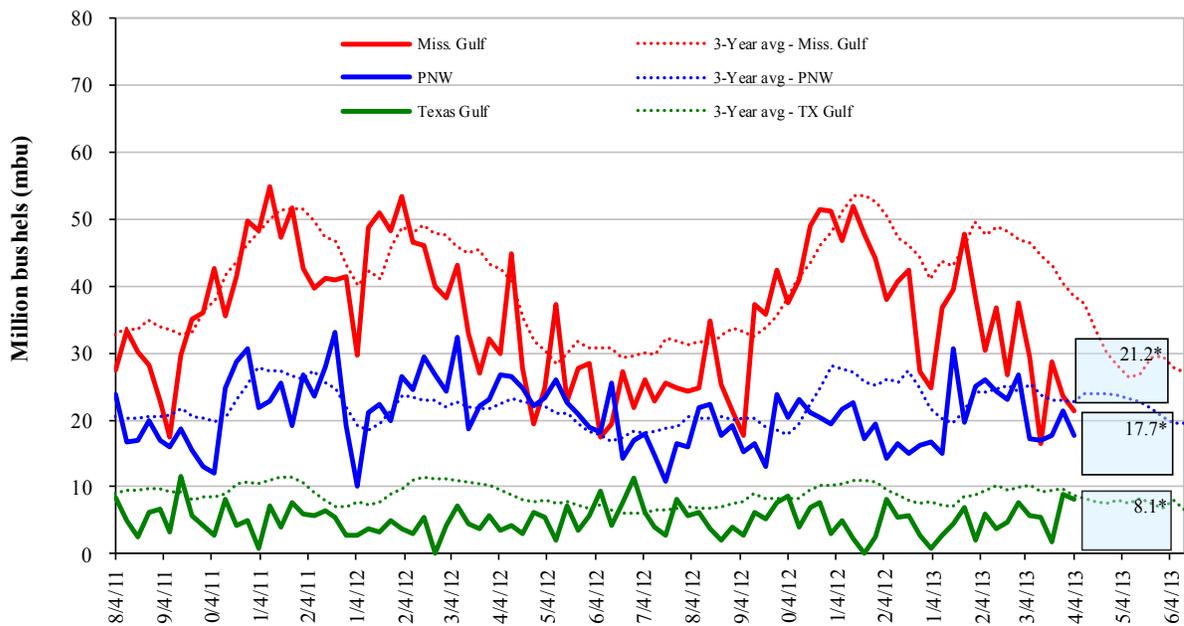


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW¹ (wheat, corn, and soybeans)



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

April 4 % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	down 10	down 8	down 2	down 17
Last year (same week)	down 29	up 129	down 13	down 34
3-yr avg (4-wk mov. avg)	down 45	down 8	down 38	down 25

Ocean Transportation

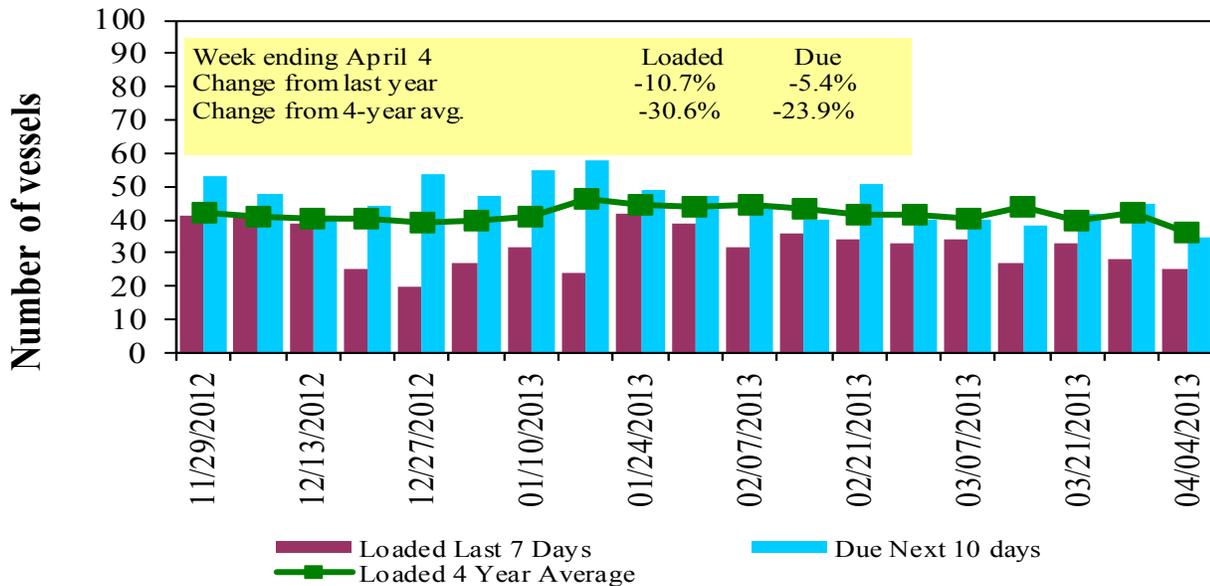
Table 17

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
4/4/2013	21	25	35	7	n/a
3/28/2013	18	28	45	10	n/a
2012 range	(13..50)	(13..46)	(27..78)	(4..20)	n/a
2012 avg.	28	33	46	11	n/a

Source: Transportation & Marketing Programs/AMS/USDA

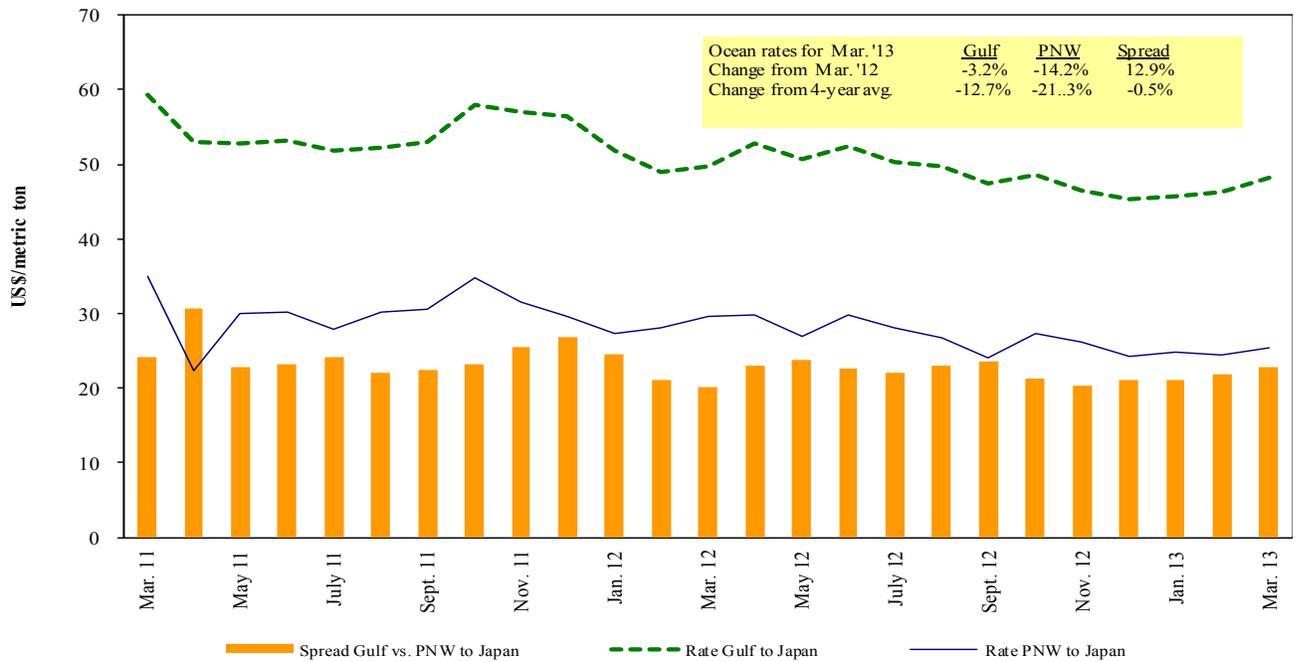
Figure 16
U.S. Gulf^d Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18
Ocean Freight Rates For Selected Shipments, Week Ending 04/06/2013

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 25/Fe 5	55,000	43.05
U.S. Gulf	China	Heavy Grain	Jan 25/Feb5	55,000	43.05
U.S. Gulf	China	Heavy Grain	Feb 1/5	54,000	20.50
U.S. Gulf	Egypt Med	Heavy Grain	Feb 20/Mar 5	60,000	23.25
U.S. Gulf	Ethiopia ¹	Wheat	Mar 11/21	21,000	44.62
PNW	China	Heavy Grain	Feb 1/5	54,000	20.50
Australia	Italy	Heavy Grain	Feb 10/25	58,000	27.00
Brazil	China	Heavy Grain	Apr 10/15	60,000	43.00
Brazil	China	Heavy Grain	March 5/25	60,000	40.25
Brazil	China	Heavy Grain	Mar 1/10	60,000	38.25
Brazil	China	Heavy Grain	Mar 3/12	60,000	35.00
Brazi	China	Heavy Grain	May 1/5	60,000	35.35
Brazil	China	Heavy Grain	Feb 8/23	60,000	35.50
France	Algeria	Wheat	Apr 15/25	30,000	18.75
France	Algeria	Wheat	Mar 20/30	30,000	19.75
River Plate	Egypt Med	Heavy Grain	Apr 8/12	60,000	32.00

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

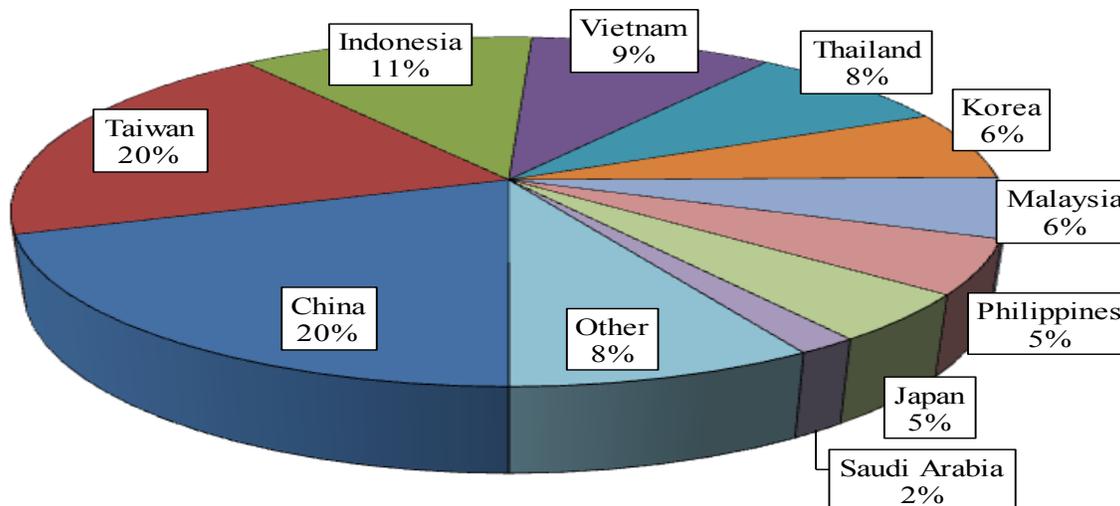
¹50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2012, containers were used to transport 8 percent of total U.S. waterborne grain exports, up 1 percentage point from 2011. Approximately 66 percent of U.S. waterborne grain exports in 2012 went to Asia, of which 11 percent were moved in containers. Asia is the top destination for U.S. containerized grain exports—96 percent in 2012.

Figure 18

Top 10 Destination Markets for U.S. Containerized Grain Exports, December 2012

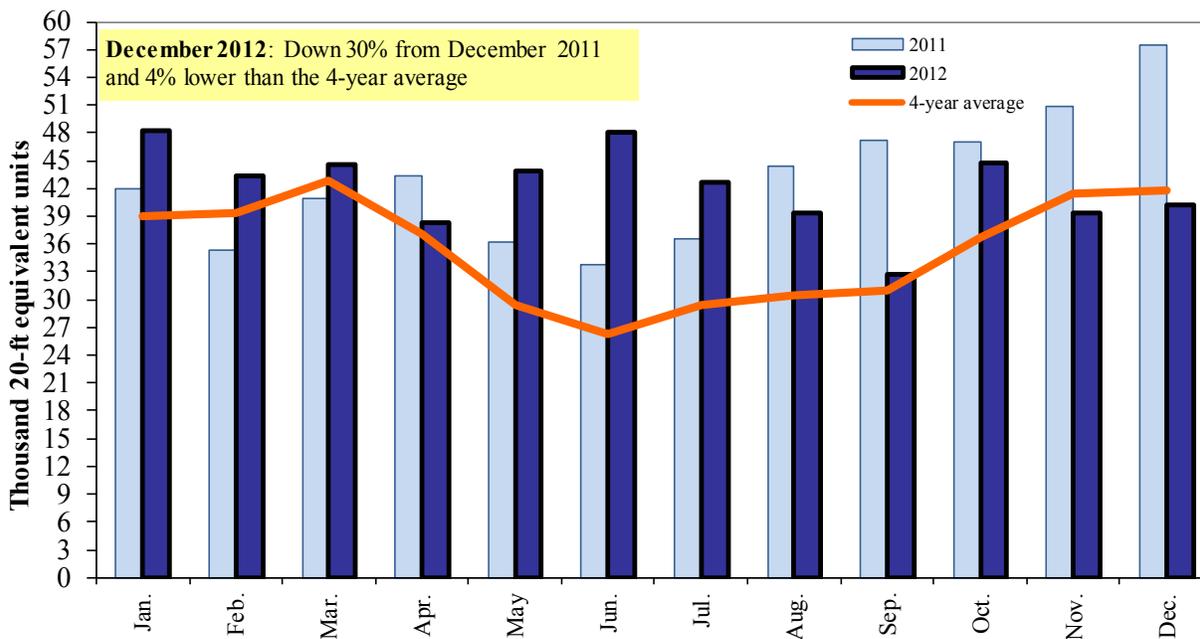


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

Figure 19

Monthly Shipments of Containerized Grain to Asia



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

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

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