United States Department of Agriculture

Grain Transportation Report

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

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April 17, 2014

Contents

The next release is April 24, 2014

WEEKLY HIGHLIGHTS

Diesel Prices Fall for Fifth Consecutive Week; Distillate Inventories Fall to Historic Lows

During the week ending April 14, diesel fuel prices fell 1 cent per gallon to $3.95, 1 cent higher than the previous year. Prices have fallen 7 cents per gallon in the past 5 weeks. According to the Energy Information Administration (EIA), a softening in crude oil prices and slowing pressure from heating oil demand have helped diesel fuel prices fall over the past few weeks. The distillate fuel inventories, which include both diesel fuel and heating oil, are currently at historical low levels after the extreme weather conditions this past winter. The EIA reports distillate inventories are projected to start the summer at 112.6 million barrels, down from the 118.6 million barrels recorded at the start of last summer and the 5-year average of 138.7 million barrels. Diesel fuel prices, which averaged $3.89 per gallon last summer, are projected to average $3.87 per gallon this summer.

Secondary Railcar Market Reflects Concern Over Upcoming Harvest

Bids in the secondary railcar market to secure empty cars in April have fallen for the past two weeks, likely indicating improvements in the supply of grain cars relative to demand. However, shippers are already bidding large premiums to secure grain cars during the months of September and October in anticipation of a continued grain car shortage during the fall harvest. Recent April bids to secure cars in September and October have been the highest on record. The average bid per car this week is $1,700 above tariff to secure cars in September and $1,978 above tariff in October. Both of these bids are down slightly from last week, but still much higher than in previous years. Normally, April bids to secure grain cars in September trade at a discount to the tariff rate while bids for October average a premium of less than $400 per car above tariff.

Upper Mississippi Navigation Improves with Warmer Temperatures

With warmer temperatures in recent weeks, **improved navigation conditions** have caused increases in upbound barge traffic on the Upper Mississippi River. For the week ending April 12 at Mississippi River Locks 27, 378 empty barges were upbound; most will be loaded with grain and returned downbound for export. One month ago, the number of Locks 27 empties was 251. In addition, for the week ending April 12, 105 barges with fertilizer moved upbound; these barges could also return downbound with export grain. The downbound grain volume at Locks 27 was 424 thousand tons, the highest since mid-December 2013.

Fertilizer Transportation in the Spotlight

During last week’s hearing on rail service issues at the U.S. Surface Transportation Board (STB), grain shippers expressed fears over whether the railroads would be able to deliver enough fertilizer in time for the spring planting. Producers in the Upper Great Plains have received between half and two-thirds of their fertilizer car orders due to railroad delays and are worried about the negative impacts insufficient fertilizer could have on spring planting. In response, BNSF Railway issued a statement on April 14 announcing specific measures it was taking to increase velocity on fertilizer shipments and improve the efficiency of cars handling fertilizer. In addition, the STB issued a directive on April 15 to Canadian Pacific Railway and BNSF to report, by April 18, their plans for ensuring delivery of fertilizer for spring planting; and provide ongoing weekly status updates over the next 6 weeks, to include actual delivery data.

Snapshots by Sector

Rail

U.S. railroads originated 19,741 **carloads of grain** during the week ending April 5, down 11 percent from last week, up 17 percent from last year, and 4 percent below the 3-year average.

During the week ending April 10, average April non-shuttle **secondary railcar bids/offers per car** were $1,000 above tariff, down $325 from last week and $1,003 higher than last year. Average shuttle secondary railcar bids/offers per car were $1,275 above tariff, down $658.50 from last week and $1,495.50 higher than last year.

Barge

During the week ending April 12, **barge grain movements** totaled 708,070 tons—11.6 percent higher than the previous week and 109.7 percent higher than the same period last year.

During the week ending April 12, 451 grain barges **moved down river**, up 7.6 percent from last week; 676 grain barges were **unloaded in New Orleans**, down 4.7 percent from the previous week.

Ocean

During the week ending April 10, 50 **ocean-going grain vessels** were loaded in the Gulf, 79 percent more than the same period last year. Fifty vessels are expected to be loaded within the next 10 days, 43 percent more than the same period last year.

During the week ending April 11, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $50 per mt, unchanged from the previous week. The cost of shipping from the Pacific Northwest to Japan was $27 per mt, unchanged from the previous week.

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Feature Article/Calendar

First Quarter Barge Tonnages Above Average Despite Icy Navigation Conditions

During the first quarter of 2014, navigation on the Upper Mississippi and Illinois rivers was impacted by frigid temperatures that produced above-average ice accumulations that limited and, at times, halted barge traffic. While portions of the Upper Mississippi River are closed during the winter due to ice and scheduled repairs, the Mississippi River in the St. Louis, MO, area and below, and the Illinois River, are usually open throughout the year. However, with this year's extremely cold temperatures, barge tonnages were significantly reduced at St. Louis and on the Illinois River (see Table 1).

Table 1- First quarter downbound grain tonnages at selected locks, 2014 compared to 3-year average

River/Lock	2014	3-year avg.	Percent change
	thousand tons		
MISS 27	2,725	3,395	-20%
OHIO 52	4,560	2,602	75%
ARK 1	663	506	31%
Total	7,948	6,503	22%
ILL 8	1,718	2,294	-25%

Source: Data supplied by U.S. Army Corps of Engineers

Despite the reduced tonnages from the Upper Mississippi and Illinois Rivers, total grain tonnages, as measured by the consolidated tonnage of grain transiting Mississippi River Locks 27, Ohio Locks and Dam 52, and Arkansas River Lock and Dam 1,[1] were 22 percent higher than the 3-year average, because of the 75 percent increase in first quarter barge shipments off the Ohio River and the 31 percent increase in volumes on the Arkansas River. The lower section of the Ohio River and the Arkansas Rivers were not adversely affected by the cold temperatures. Table 1 shows that Mississippi River Locks 27, near St. Louis, had a total of 2.7 million tons of grain for the first quarter, a 20 percent reduction from the 3-year average. The drop in Mississippi River Locks 27 tonnages was primarily due to the 25 percent decrease in barge shipments from the ice-clogged Illinois River, which flows into the Mississippi River above St. Louis.

Barge rates for the Illinois River and for the Mississippi River at St. Louis were above average during the first quarter as barge companies incurred additional operating costs during the extreme winter conditions. Illinois River barge operators also contended with smaller channels to maneuver barges as ice formed along the shoreline. In some instances, ice completely stopped traffic. Cleaning barges in sub-freezing conditions slowed the process of preparing barges to be loaded with new southbound loads. During the first quarter, the average St. Louis barge rate for export grain was 457 percent of tariff ($18.23 per ton), 40 percent higher than the 3-year average. Lower Illinois River rates for export grain were 564 percent of tariff ($26.17 per ton), 37 percent higher than the 3-year average.

[1] Mississippi River Locks 27 (MISS 27) also known as Chain of Rocks Locks, Granite City, IL, is the last lock for downbound barges on the Mississippi River. For purposes of measuring downbound tonnages on the Ohio River, the U.S. Army Corps of Engineers collects data at Locks and Dam 52 (OHIO 52), Brookport, IL, because it is strategically located on the Ohio River near the junction of the Tennessee and Cumberland Rivers. Locks and Dam 53, Grand Chain, IL, is technically the last lock on the Ohio River. Arkansas River Lock and Dam 1 (ARK 1), also known as Norrell Lock, Tichnor, AR, is the last lock on the Arkansas River, but traffic must use the White River to connect with the Mississippi River. On the White River, Montgomery Point Lock and Dam, near Tichnor, AR, is used only during low water conditions. LaGrange Lock and Dam (ILL 8), Versailles, IL, is the last lock for downbound barges on the Illinois River.

Since mid-March, portions of the Upper Mississippi and Illinois rivers have intermittently experienced temperatures above freezing. With reduced ice accumulations and therefore decreased associated operational costs, grain barge rates have significantly decreased. As of April 15, St. Louis barge rates were 264 percent of tariff ($10.53 per ton) and lower Illinois River rates were 384 percent of tariff ($17.82 per ton), down 42 and 32 percent, respectively, from the 3-year average of first-quarter rates.

According to the U.S. Army Corps of Engineers, St. Paul District, as of April 14th, Lake Pepin is open for navigation **as** ice on the lake is thin enough for barges to navigate. St. Paul District locks and dams are fully operational. The reduced ice accumulations on Lake Pepin will allow for the eventual opening of the entire navigable portion of the Mississippi River. The first towboat to transit Lake Pepin should arrive in St. Paul on late April 16 or early April 17. Barge operators have been actively moving empty barges as far north as possible in anticipation of the river opening (see Figure 11 inside)
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Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
Week ending		Unit Train	Shuttle		Gulf	Pacific
04/16/14	265	295	270	213	224	191
04/09/14	266	312	298	206	224	191

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

Source: Transportation & Marketing Programs/AMS/USDA

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

Table 2

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

Commodity	Origin--Destination	4/11/2014	4/4/2014
Corn	IL--Gulf	-0.80	-0.82
Corn	NE--Gulf	-0.95	-1.00
Soybean	IA--Gulf	-1.16	-1.17
HRW	KS--Gulf	-1.78	-1.85
HRS	ND--Portland	-2.89	-3.01

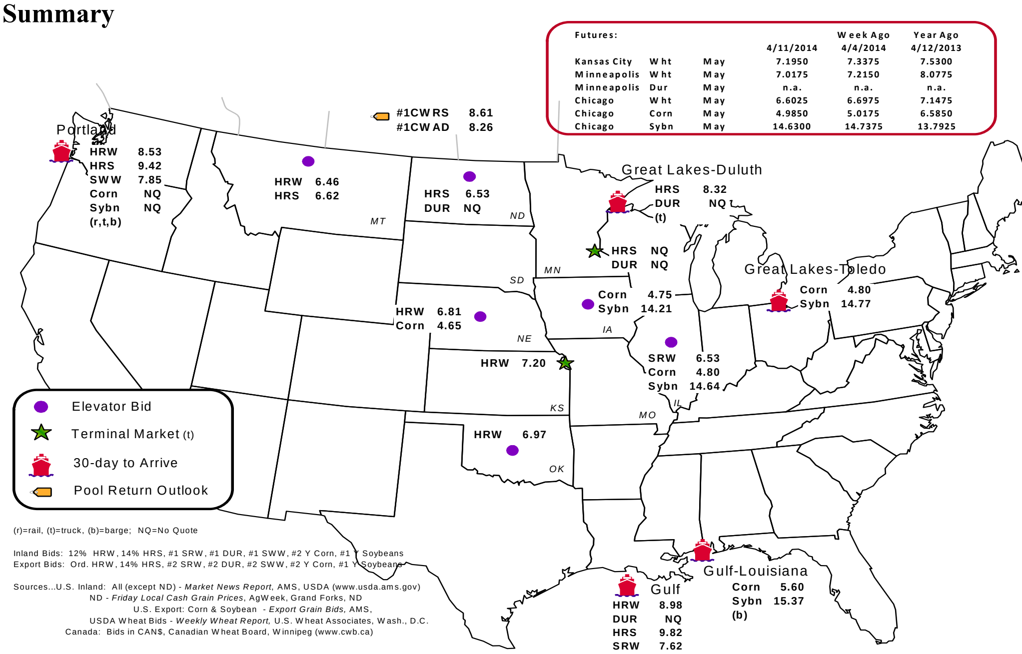
Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 1

Grain bid Summary



Rail Transportation

Table 3

Rail Deliveries to Port (carloads)[1]

Week ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-Border Mexico[3]
4/09/2014[p]	1,039	1,340	5,821	537	8,737	4/5/2014	1,749
4/02/2014[r]	1,065	1,307	4,690	619	7,681	3/29/2014	1,752
2014 YTD[r]	17,215	22,780	78,538	12,407	130,940	2014 YTD	25,811
2013 YTD[r]	7,889	14,438	58,203	8,103	88,633	2013 YTD	17,166
2014 YTD as % of 2013 YTD	218	158	135	153	148	% change YTD	150
Last 4 weeks as % of 2013[2]	830	98	180	523	182	Last 4wks % 2013	143
Last 4 weeks as % of 4-year avg.[2]	225	88	138	145	132	Last 4wks % 4 yr	89
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	70,298
Total 2012	22,604	40,780	199,419	24,659	287,462	Total 2012	92,008

[1] Data is incomplete as it is voluntarily provided

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

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

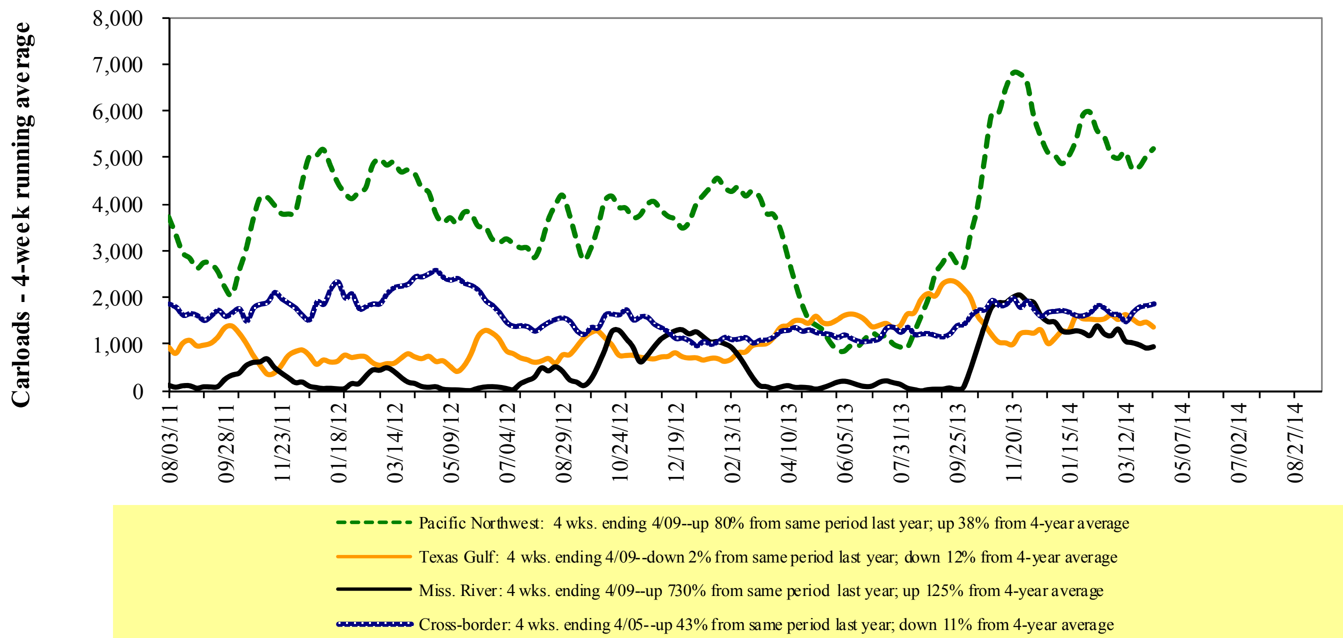
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

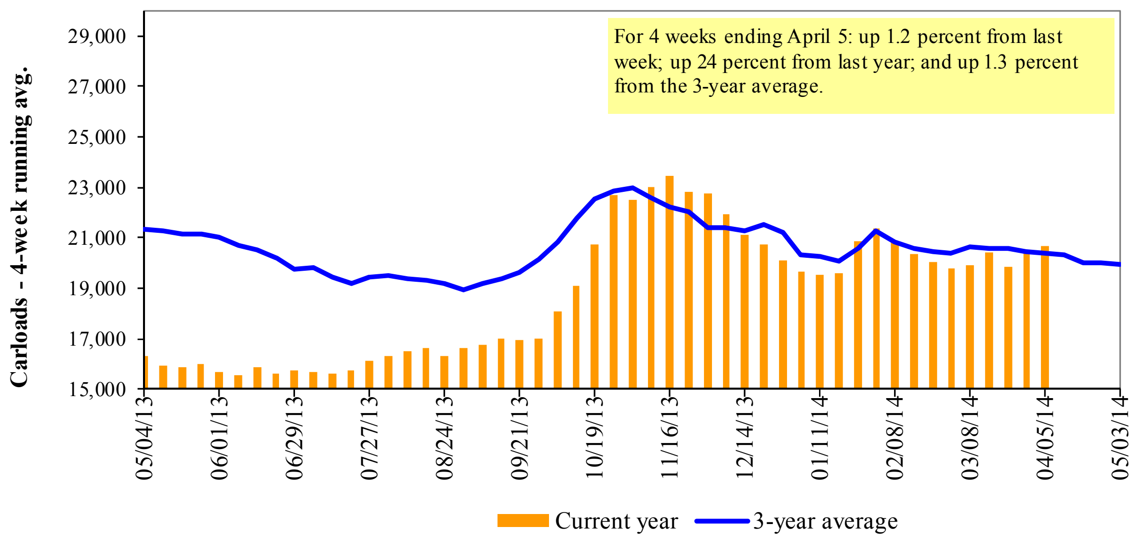
	East		West			U.S. total	Canada	
Week ending	**CSXT**	**NS**	**BNSF**	**KCS**	**UP**		**CN**	**CP**
04/05/14	1,676	3,247	8,967	884	4,967	19,741	4,631	4,929
This week last year	1,887	2,286	8,575	533	3,607	16,888	3,568	6,531
2014 YTD	28,086	42,295	120,208	13,665	80,524	284,778	56,042	66,368
2013 YTD	21,477	35,291	130,027	6,616	53,384	246,795	47,498	74,500
2014 YTD as % of 2013 YTD	131	120	92	207	151	115	118	89
Last 4 weeks as % of 2013	147	136	102	216	147	124	153	95
Last 4 weeks as % of 3-yr avg.[1]	108	119	87	188	110	102	120	100
Total 2013	86,466	137,915	454,262	34,412	222,258	935,313	190,125	272,753

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

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

Figure 3

Total Weekly U.S. Class I Railroad Grain Car Loadings



Source: Association of American Railroads

Table 5

Railcar Auction Offerings[1] ($/car)[2]

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

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

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

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

[4]UP - GCAS = Grain Car Allocation System

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

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

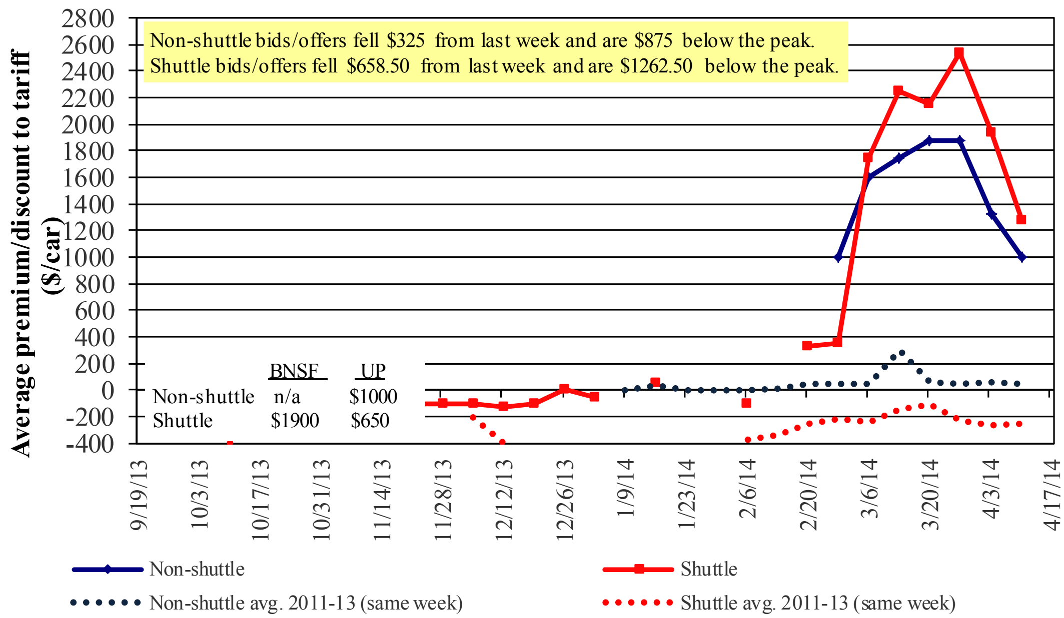
[5]Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

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

Figure 4

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

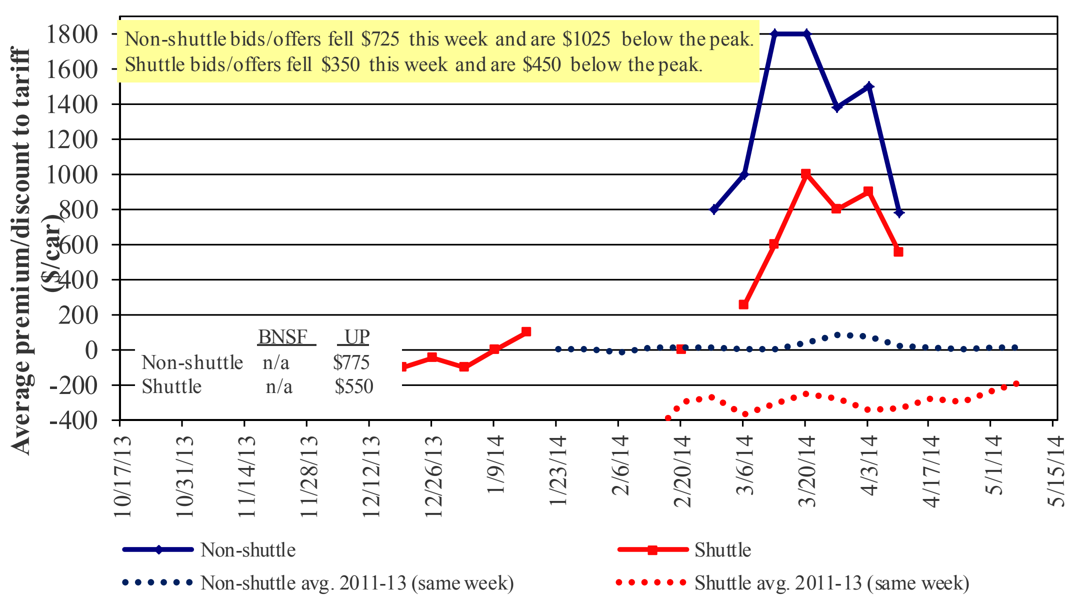


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

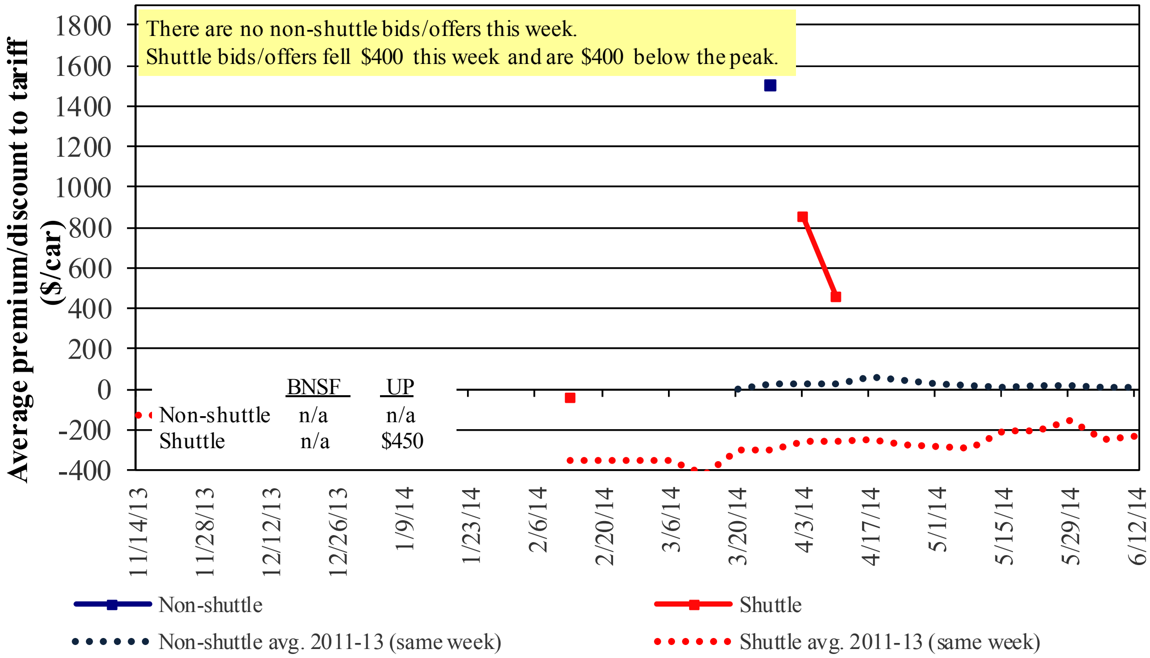


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

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



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 6

Weekly Secondary Railcar Market ($/car)[1]

Week ending	Delivery period					
4/10/2014	**Apr-14**	**May-14**	**Jun-14**	**Jul-14**	**Aug-14**	**Sep-14**
Non-shuttle						
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	1,000	775	n/a	n/a	n/a	n/a
Change from last week	(325)	(725)	n/a	n/a	n/a	n/a
Change from same week 2013	1,000	n/a	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	1,900	n/a	n/a	n/a	n/a	1,700
Change from last week	(567)	n/a	n/a	n/a	n/a	(100)
Change from same week 2013	2,116	n/a	n/a	n/a	n/a	n/a
UP-Pool	650	550	450	400	n/a	n/a
Change from last week	(750)	(350)	(400)	n/a	n/a	n/a
Change from same week 2013	875	767	n/a	n/a	n/a	n/a

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

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

Table 7

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

Effective date: 4/1/2014	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[3]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$3,191	$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
Shuttle Train							
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
	Council Bluffs, IA	Stockton, CA	$4,400	$722	$50.86	$1.29	3
Soybeans	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

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

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

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

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

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

Table 8

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

Effective date: 4/1/2014				Fuel			Percent
	Origin		Tariff	surcharge	Tariff plus surcharge per:		change
Commodity	state	Destination region	rate/car[1]	per car[2]	metric ton[3]	bushel[3]	Y/Y[4]
Wheat	MT	Chihuahua, CI	$6,360	$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

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

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

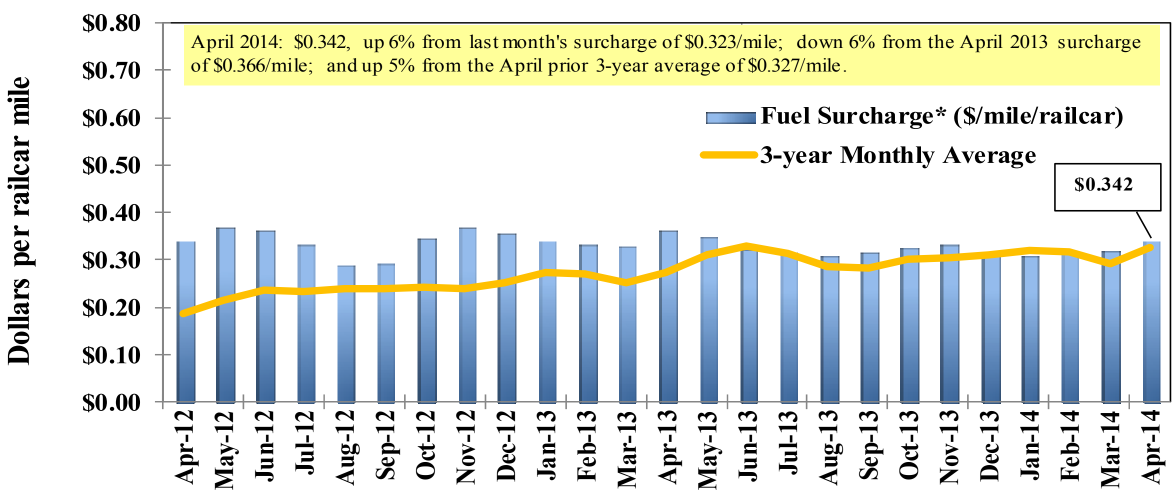
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average[1]



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

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

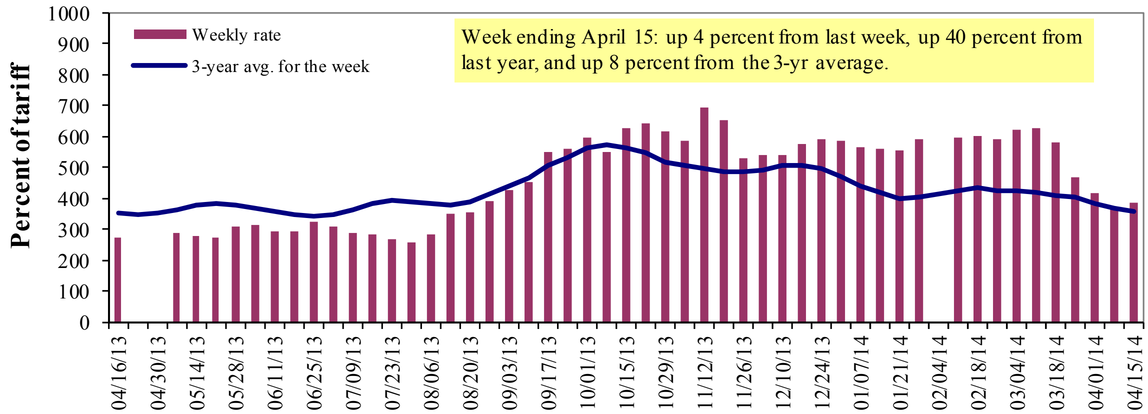
** BNSF strike price (diesel price when fuel surcharges begin) changed from $1.25/gal. to $2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was $0.227/mile instead of $0.331/mile.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate[1,2]



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	4/15/2014	--	389	384	264	296	296	216
	4/8/2014	--	390	370	252	312	312	222
$/ton	4/15/2014	--	20.69	17.82	10.53	13.88	11.96	6.78
	4/8/2014	--	20.75	17.17	10.05	14.63	12.60	6.97
Current week % change from the same week:								
	Last year	--	25	40	17	51	51	19
	3-year avg. [2]	--	20	8	-3	-5	-5	-7
Rate[1]	May	431	370	366	243	293	293	216
	July	429	370	368	251	296	296	218

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

Source: Transportation & Marketing Programs/AMS/USDA

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

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

Figure 9

Benchmark tariff rates

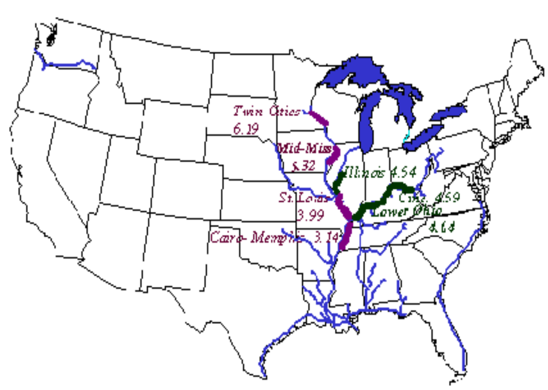
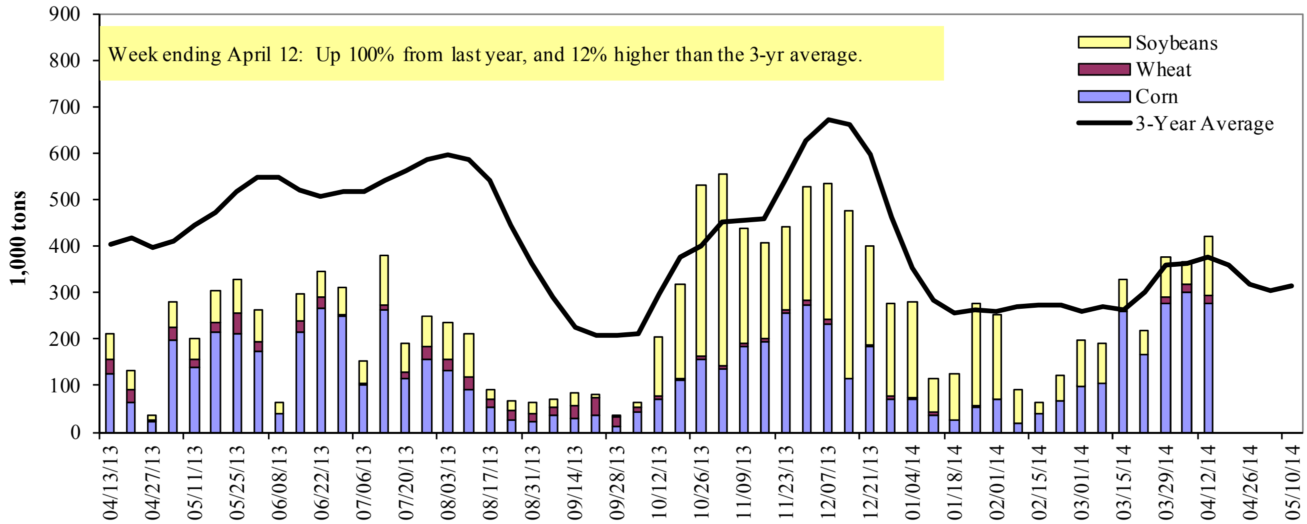


Figure 10

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



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

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

Week ending 4/12/2014	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	17	0	13	0	30
Winfield, MO (L25)	127	0	113	2	241
Alton, IL (L26)	261	18	139	3	421
Granite City, IL (L27)	277	18	125	3	424
Illinois River (L8)	171	6	31	2	210
Ohio River (L52)	203	21	32	0	257
Arkansas River (L1)	4	21	0	3	28
Weekly total - 2014	485	60	157	6	708
Weekly total - 2013	171	85	82	0	338
2014 YTD[1]	5,068	504	3,660	59	9,291
2013 YTD	1,872	1,271	3,083	85	6,311
2014 as % of 2013 YTD	271	40	119	69	147
Last 4 weeks as % of 2013[2]	314	74	143	55	206
Total 2013	9,504	4,111	10,065	255	23,935

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

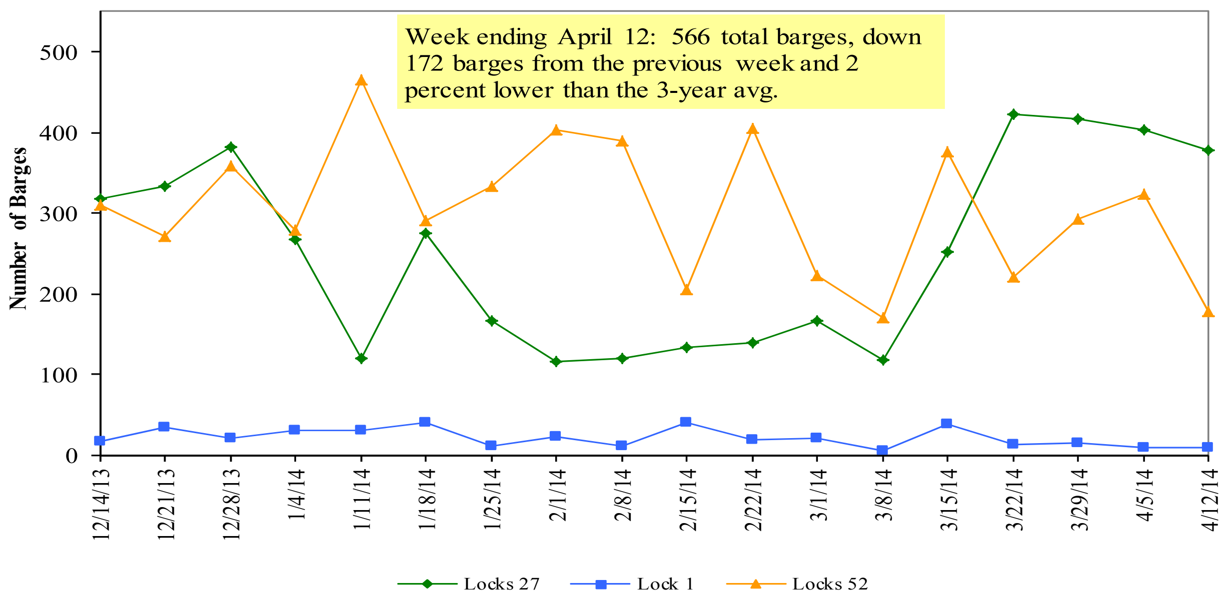
[2] As a percent of same period in 2013.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers

Figure 11

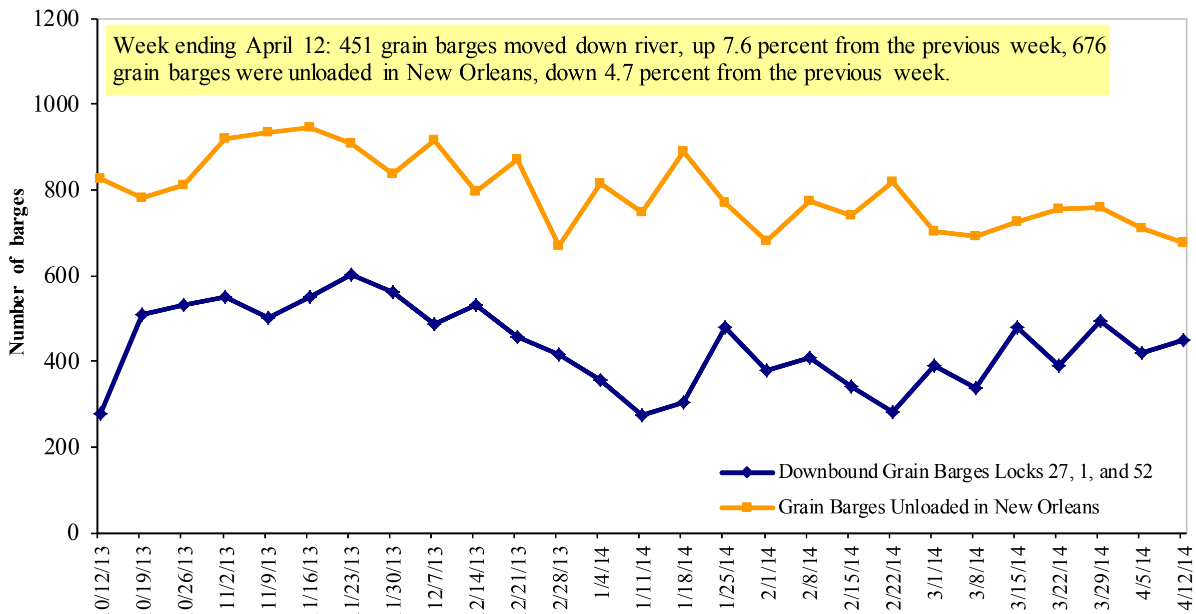
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



Source: U.S. Army Corps of Engineers

Figure 12

Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices[1], Week Ending 4/14/2013 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	4.068	-0.007	0.091
	New England	4.220	-0.020	0.115
	Central Atlantic	4.193	-0.012	0.161
	Lower Atlantic	3.947	0.001	0.036
II	Midwest[2]	3.932	-0.010	0.009
III	Gulf Coast[3]	3.790	-0.003	-0.062
IV	Rocky Mountain	3.942	-0.013	0.060
V	West Coast	3.981	-0.001	-0.085
	West Coast less California	3.893	-0.001	-0.077
	California	4.056	0.000	-0.091
Total	U.S.	3.952	-0.007	0.010

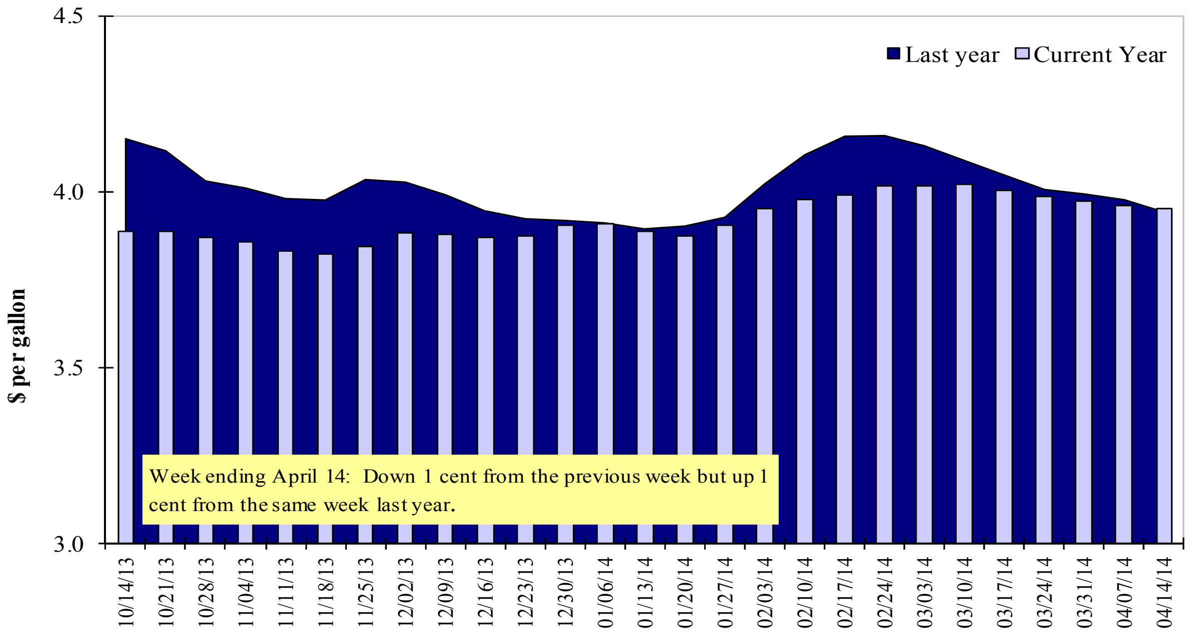
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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

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

Figure 13

Weekly Diesel Fuel Prices, U.S. Average



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

Grain Exports

Table 12

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

	Wheat						Corn	Soybeans	Total
Week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances[1]									
4/3/2014	1,594	764	1,367	908	130	4,762	17,951	3,395	26,108
This week year ago	1,810	1,021	1,026	572	68	4,497	4,211	2,796	11,504
Cumulative exports-marketing year[2]									
2013/14 YTD	9,868	6,696	5,141	3,442	385	25,532	24,015	41,195	90,742
2012/13 YTD	7,891	4,112	4,825	3,971	390	21,189	11,494	33,502	66,185
YTD 2013/14 as % of 2012/13	125	163	107	87	99	120	209	123	137
Last 4 wks as % of same period 2012/13	93	87	151	176	214	117	441	155	245
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293
2011/12 Total	9,904	4,319	6,312	5,601	491	26,627	37,900	36,727	101,254

[1] Current unshipped export sales to date

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

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

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

Table 13

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

Week ending 4/03/2014	Total Commitments[2] 2013/14 Current MY	2012/13 Last MY	% change current MY from last MY	Exports[3] 2012/13
	- 1,000 mt -			- 1,000 mt -
Japan	9,062	5,444	66	7,000
Mexico	9,269	3,702	150	4,370
China	3,773	2,474	53	2,450
Venezuela	728	538	35	1,158
Taiwan	1,373	449	206	512
Top 5 Importers	**24,205**	**12,607**	**92**	**15,490**
Total US corn export sales	**41,966**	**15,706**	**167**	**18,670**
% of Projected	94%	84%		
Change from prior week	633	185		
Top 5 importers' share of U.S. corn export sales	58%	80%		83%
USDA forecast, April 2014	**44,529**	**18,601**	**139**	
Corn Use for Ethanol USDA forecast, April 2014	**127,000**	**118,059**	**8**	

(n) indicates negative number.

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

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

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

Table 14

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

Week Ending 4/03/2014	Total Commitments[2] 2013/14 Current MY	2012/13 Last MY	% change current MY from last MY	Exports[3] 2012/13
	- 1,000 mt -			- 1,000 mt -
China	27,712	22,188	25	21,522
Mexico	2,994	2,177	38	2,565
Japan	1,671	1,518	10	1,751
Indonesia	1,915	1,242	54	1,682
Taiwan	1,083	1,043	4	1,120
Top 5 importers	**35,375**	**28,168**	**26**	**28,641**
Total US soybean export sales	**44,590**	**36,297**	**23**	**37,060**
% of Projected	104%	101%		
Change from prior week	79	319		
Top 5 importers' share of U.S. soybean export sales	79%	78%		
USDA forecast, April 2014	**43,052**	**35,967**	**20**	

(n) indicates negative number.

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

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

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

Table 15

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

Week Ending 4/03/2014	Total Commitments[2] 2013/14 Current MY	2012/13 Last MY	% change current MY from last MY	Exports[3] 2012/13
	- 1,000 mt -			- 1,000 mt -
Japan	2,817	3,483	(19)	3,544
Nigeria	2,690	2,857	(6)	3,002
Mexico	2,923	2,760	6	2,761
Philippines	1,996	1,871	7	1,965
Egypt	1,487	261	470	1,678
Korea	1,217	1,375	(12)	1,385
Taiwan	950	988	(4)	1,038
China	4,259	789	440	743
Brazil	3,981	436	813	527
Colombia	724	571	27	600
Top 10 importers	**23,044**	**15,391**	**50**	**17,243**
Total US wheat export sales	**30,295**	**25,686**	**18**	**26,348**
% of Projected	95%	94%		
Change from prior week	42	253		
Top 10 importers' share of U.S. wheat export sales	76%	60%		65%
USDA forecast, April 2014	**32,016**	**27,439**	**17**	

(n) indicates negative number.

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

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

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

Table 16

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

Port regions	Week ending 04/10/14	Previous Week[1]	Current Week as % of Previous	2014 YTD[1]	2013 YTD[1]	2014 YTD as % of 2013 YTD	Last 4-weeks as % of 2013	Last 4-weeks as % of 3-yr. avg.	Total[1] 2013
Pacific Northwest									
Wheat	340	250	136	3,455	3,627	95	113	116	11,585
Corn	238	234	102	1,852	1,195	155	186	118	2,973
Soybeans	70	204	34	4,468	3,617	124	125	113	9,090
Total	**647**	**688**	**94**	**9,774**	**8,439**	**116**	**130**	**116**	**23,647**
Mississippi Gulf									
Wheat	200	165	121	1,384	2,619	53	52	65	9,711
Corn	1,033	845	122	9,293	3,083	301	351	219	14,828
Soybeans	136	229	59	9,233	6,487	142	246	112	21,462
Total	**1,369**	**1,239**	**111**	**19,910**	**12,189**	**163**	**217**	**150**	**46,002**
Texas Gulf									
Wheat	146	198	74	2,008	1,895	106	94	79	9,039
Corn	0	31	0	174	42	410	86	33	255
Soybeans	0	0	n/a	255	122	208	n/a	0	908
Total	**146**	**228**	**64**	**2,437**	**2,060**	**118**	**94**	**72**	**10,203**
Interior									
Wheat	34	39	87	341	258	132	147	91	1,244
Corn	102	117	87	1,503	768	196	190	84	3,943
Soybeans	51	74	69	1,385	1,293	107	450	114	3,212
Total	**187**	**230**	**81**	**3,229**	**2,319**	**139**	**139**	**95**	**8,399**
Great Lakes									
Wheat	0	0	n/a	0	90	0	0	0	884
Corn	0	0	n/a	0	0	n/a	n/a	0	0
Soybeans	0	0	n/a	0	4	0	0	0	699
Total	**0**	**0**	**n/a**	**0**	**94**	**0**	**0**	**0**	**1,583**
Atlantic									
Wheat	1	8	7	53	297	18	20	35	645
Corn	25	46	54	106	2	n/a	n/a	1,375	242
Soybeans	16	18	88	941	630	149	263	191	1,652
Total	**41**	**72**	**57**	**1,099**	**929**	**118**	**147**	**164**	**2,540**
U.S. total from ports[2]									
Wheat	720	660	109	7,240	8,786	82	190	149	33,108
Corn	1,398	1,272	110	12,928	5,090	254	450	211	22,241
Soybeans	272	524	52	16,281	12,153	134	49	53	37,024
Total	**2,391**	**2,456**	**97**	**36,449**	**26,029**	**140**	**145**	**121**	**92,373**

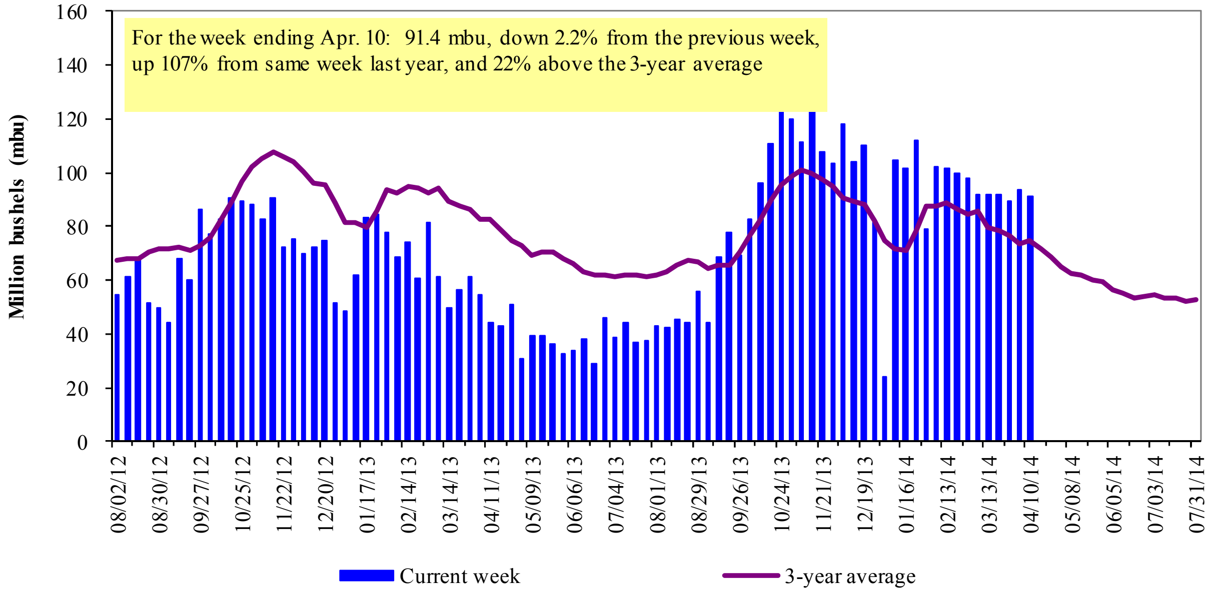
[1] Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 61 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2013.

Figure 14

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

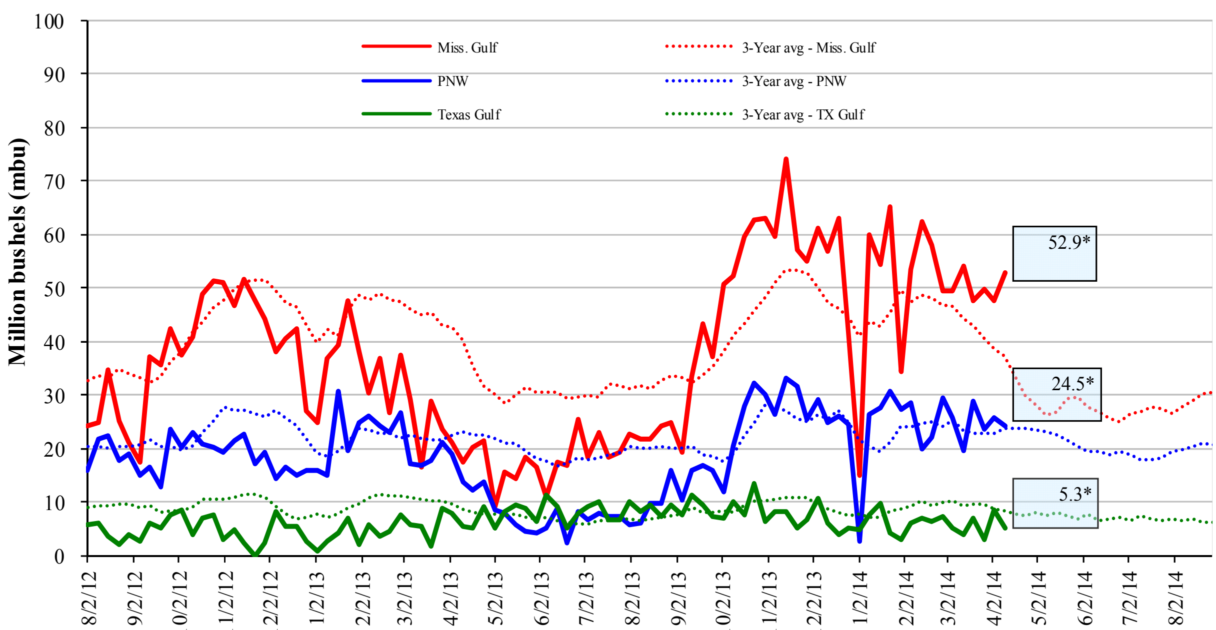


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

Apr. 10: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 11	down 37	up 4	down 6
Last year (same week)	up 204	down 3	up 155	up 75
3-yr avg. (4-wk mov. avg.)	up 61	down 34	up 42	up 9

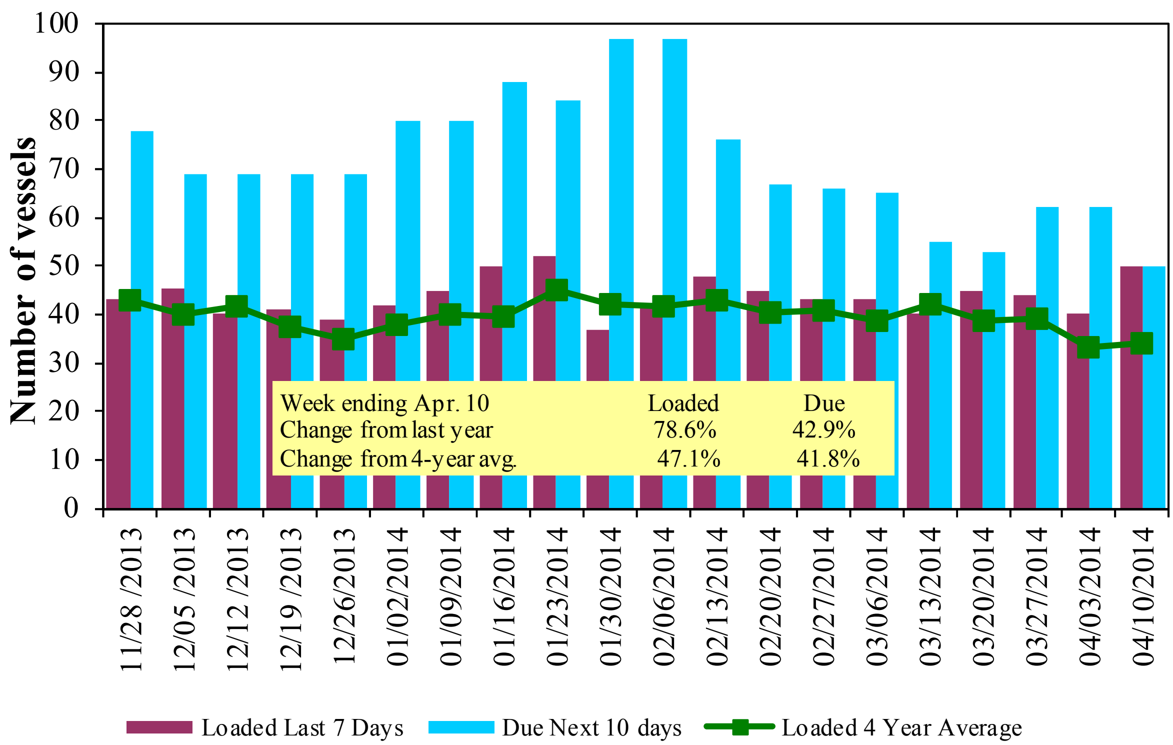
Ocean Transportation

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
4/10/2014	72	50	50	19	n/a
4/3/2014	66	40	62	18	n/a
2013 range	(16..60)	(20..56)	(31..81)	(0..24)	n/a
2013 avg.	32	33	51	12	n/a

Source: Transportation & Marketing Programs/AMS/USDA

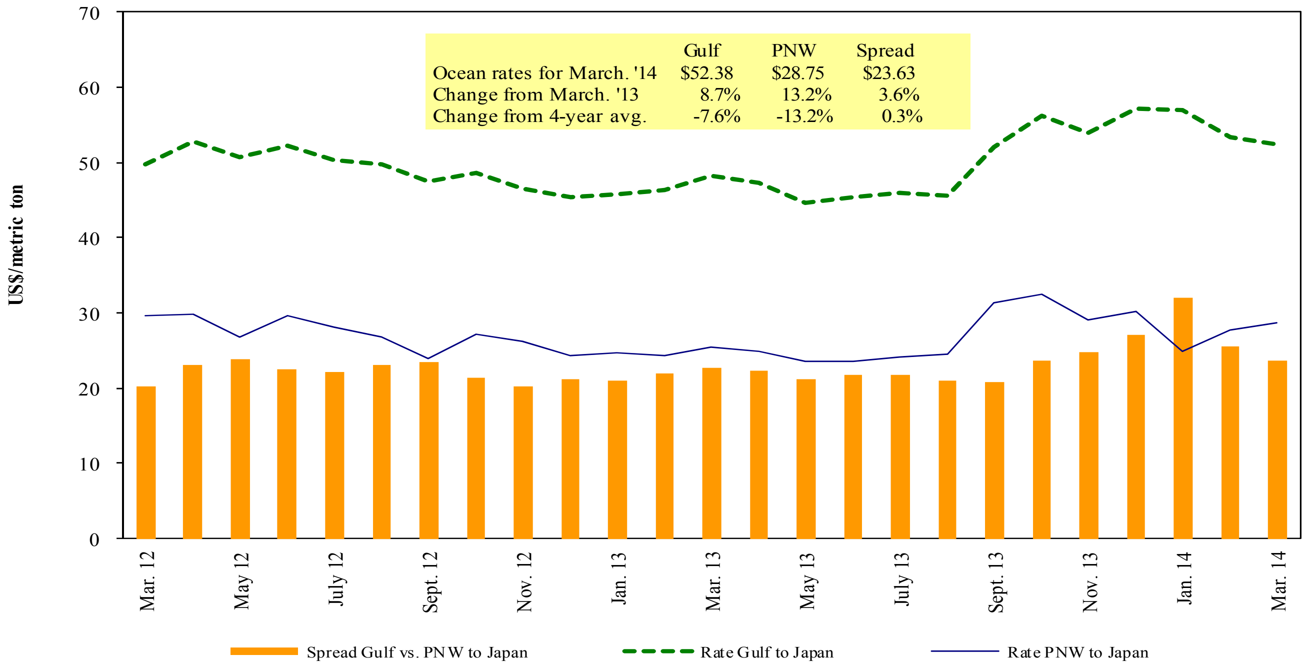
Figure 16
U.S. Gulf[1] Vessel Loading Activity



Source:Transportation & Marketing Programs/AMS/USDA
[1]U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18

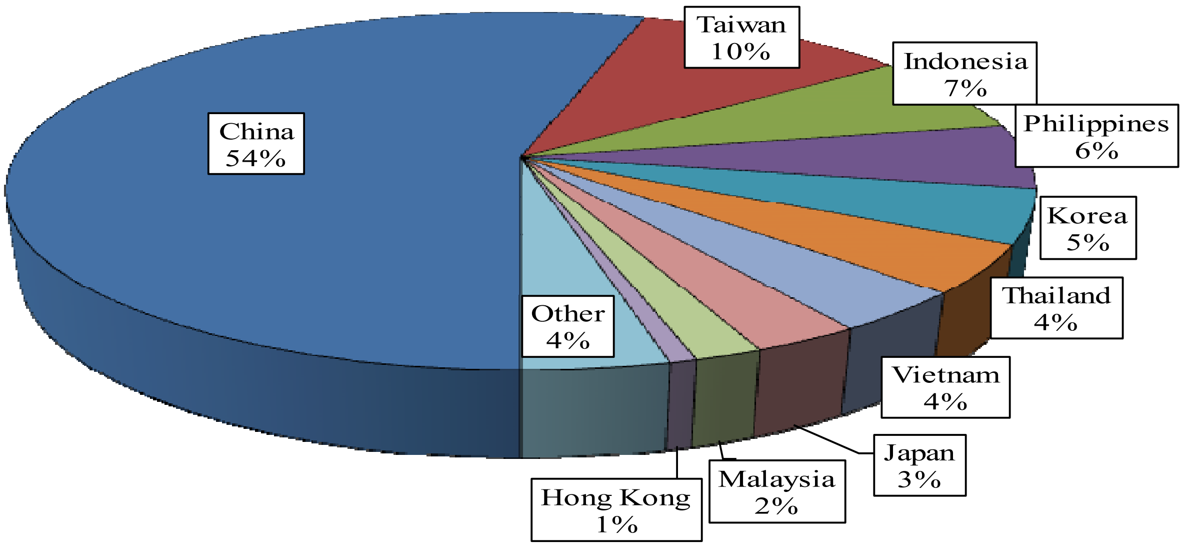
Ocean Freight Rates For Selected Shipments, Week Ending 4/12/2014

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Algeria	Wheat	Mar 10/15	28,000	38.00
U.S. Gulf	China	Heavy Grain	Feb 15/25	55,000	49.00
U.S. Gulf	Tanzania[1]	Wheat	Mar 24/Apr 4	16,100	133.31
PNW	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	Aug 1/5	60,000	40.00
Brazil	China	Heavy Grain	Jul 15/Aug 15	60,000	40.00
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

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

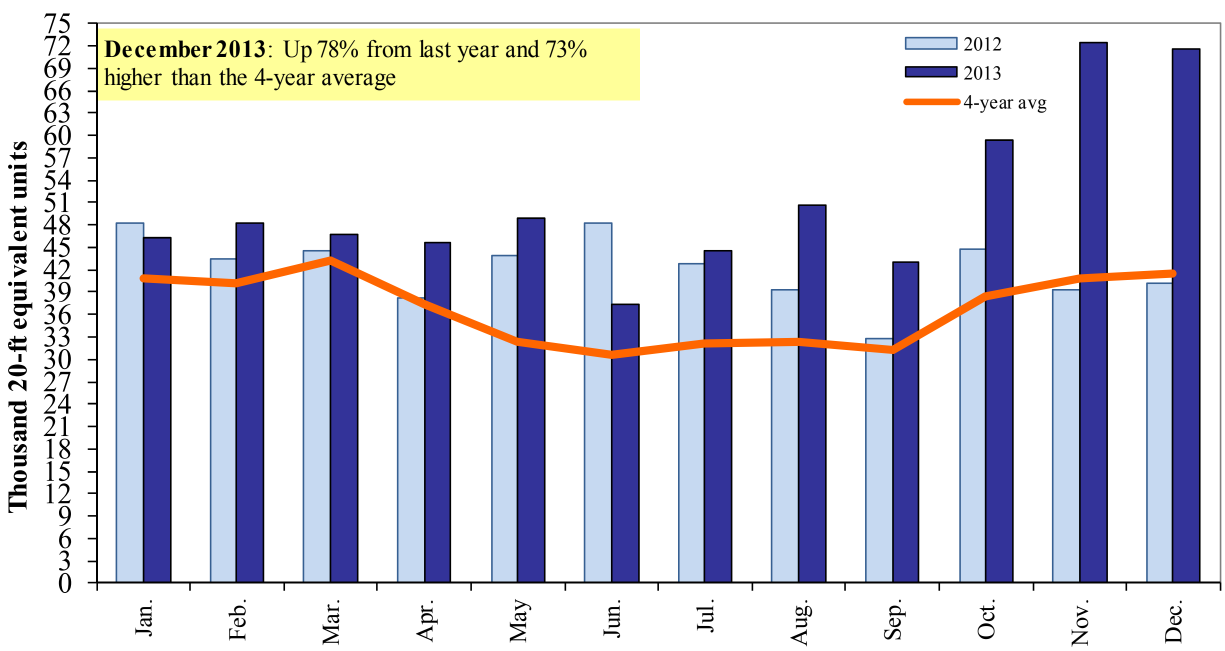


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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