United States Department of Agriculture

Grain Transportation Report

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

Contact Us

April 30, 2015

Contents

The next release is May 7, 2015

WEEKLY HIGHLIGHTS

Corn Inspections Highest Since Mid-April Last Year

For the week ending April 23, **total inspections of grain** (corn, wheat, soybeans) from all major export regions reached 2.14 million metric tons (mmt), up 18 percent from the past week, up 4 percent from last year, and 16 percent above the 3-year average. Soybean inspections jumped 114 percent from the previous week as shipments to Asia rebounded. Corn inspections increased 21 percent and were the highest since mid-April last year. Wheat inspections, however, were down 12 percent from the past week. Increased shipments to Asia and Latin America helped boost Mississippi Gulf grain inspections by 44 percent. Pacific Northwest inspections dropped 13 percent.

Southern CA Ports Monitor the Drayage Trucking Picket Lines

The West Coast vessel backlog from the prolonged labor negotiations is dramatically improved and is now approaching normal conditions again. On April 27, a small number of port truck drivers had informational pickets posted at 8 terminals at the ports of Los Angeles/Long Beach, CA. This Teamster-supported activity is targeting just a few of many drayage companies that serve the ports, in an attempt to get the drivers recognized as employees. Both ports and local authorities are monitoring the situation and cargo is moving through ports unimpeded.

AFTC and Livestock Organizations Request the HOS Exemption for Livestock Haulers be Renewed

On April 22, Agricultural & Food Transporters Conference (AFTC) and a coalition of livestock organizations sent a letter to Department of Transportation's (DOT) Secretary Foxx and Federal Motor Carrier Safety Administration's (FMCSA) Scott Darling requesting the exemption for livestock haulers from the 30-minute rest break under the Hours Of Service (HOS) regulations be renewed past the June 11, 2015 expiration date. The initial exemption began on June 11, 2014, following a successful 90-day waiver request during the summer months of 2013. The coalition argues that over the past year, those hauling livestock have demonstrated that they can maintain a high level of safety while operating under the exemption and would benefit greatly from its extension. The coalition stated it is confident that FMCSA will grant the renewal request for livestock haulers prior to June 11, ensuring no lapse in coverage under the exemption.

Snapshots by Sector

Export Sales

During the week ending April 16, **unshipped balances** of wheat, corn, and soybeans totaled 21.2 mmt, 11 percent lower than at the same time last year. **Corn export sales** reached 0.868 mmt, up 48 percent and **wheat export sales** of 0.398 mmt were up significantly from the previous week. **Soybean export sales** of 0.102 mmt were down 67 percent from the previous week.

Rail

U.S. railroads originated 18,166 **carloads of grain** during the week ending April 18, down 24 percent from last week, 16 percent from last year, and 6 percent from the 3-year average.

During the week ending April 23, average May shuttle **secondary railcar bids/offers per car** were $300 below tariff, the same as last week and $1,150 lower than last year. Non-shuttle secondary railcar bids/offers were $138 below tariff, down $38 from last week and $1,013 lower than last year.

Barge

During the week ending April 25, **barge grain movements** totaled 687,638 tons—about 1 percent lower than the previous week and 10 percent higher than the same period last year.

During the week ending April 25, 431 grain barges **moved down river**, down 1 percent from last week; 655 grain barges were **unloaded in New Orleans**, up 50 percent from the previous week.

Ocean

During the week ending April 23, 29 **ocean-going grain vessels** were loaded in the Gulf, 27 percent less than the same period last year. Forty-nine vessels are expected to be loaded within the next 10 days, 2 percent less than the same period last year.

During the week ending April 23, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $31 per metric ton (mt), unchanged from the previous week. The cost of shipping from the PNW to Japan was $17 per mt, unchanged from the previous week.

Fuel

During the week April 27, U.S. **diesel fuel prices** averaged $2.81 per gallon, 3 cents higher than the previous week. They were down $1.16 from the same week last year.

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Web: http://dx.doi.org/10.9752/TS056.04-30-2015

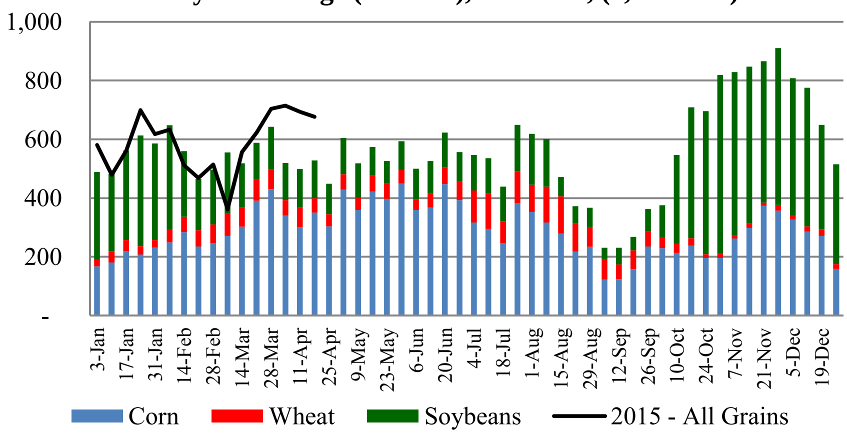
Feature Article/Calendar

Seasonal Variations in Barge Movements of Grain

Barges on the inland waterways are an important transportation mode for supplying grain (corn, wheat, and soybeans) to Mississippi River-Gulf of Mexico export elevators. Barges are able to offer the lowest inland transportation costs on a ton-mile basis, in part, because of their large carrying capacity—one 15-barge tow is equivalent to two trains of 100 jumbo hopper railcars each.[1] A jumbo hopper railcar carries 112 tons or 4,000 bushels of grain. Typically, barges supply 53, 28, and 46 percent of corn, wheat, and soybean exports, respectively, to export elevators for overseas destinations.[2]

USDA's April 2015 *World Agricultural Supply and Demand Estimates* projected that for the 2014/15 crop year, corn exports will be 1.80 billion bushels, soybean exports will be 1.79 billion bushels, and wheat exports will be 0.880 billion bushels. U.S. corn has a variety of uses, which principally include ethanol and by-products production such as distillers dried grains and feed. Export corn represents 13 percent of production in 2014/15, while export soybeans are 45 percent of production. This article examines the seasonal variations of barged grain and oilseeds and the differences of when peak movements of corn, wheat, and soybeans occur.

Figure 1 - Weekly Grain Barge Shipments, 3-year average (2012-14), and 2015, (1,000 tons) [1]



For the last 3 years, total barge tonnages reached peak annual volumes during the fall grain and oilseed harvest, typically from late September to early December (see figure 1).[3] This is due to large increases in barged soybeans that occur during harvest. Barged corn tonnages are generally the highest during June, well before the harvest season. Wheat barge movements, while significantly less in volume than corn and soybeans, are generally the largest during late summer. Figure 1 shows the typical drop that occurs in September as the number of downbound grain loaded barges decrease as more empty barges are moved upbound to be stationed near

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[1] Iowa Department of Transportation, Barge Comparison Chart. http://www.iowadot.gov/compare.pdf

[2] Sparger, Adam, and Nick Marathon. Transportation of U.S. Grains: A Modal Share Analysis, May 2013. U.S. Dept. of Agriculture, Agricultural Marketing Service. Web. http://dx.doi.org/10.9752/TS049.05-2013

[3] Weekly barge shipments are the sum of the downbound grain through the locking portions of the Mississippi, Ohio, and Arkansas Rivers. For purposes of measuring downbound tonnages on the Ohio River, the U.S. Army Corps of Engineers collects data at Locks and Dam 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, 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. Mississippi River Locks 27, also known as Chain of Rocks Locks, Granite City, IL, is the last lock for downbound barges on the Mississippi River.

potential shippers. Current weekly total tonnages for 2015 are shown in Figure 1. Year-to-date totals are 6 percent higher than the 3-year average. Since the beginning of 2015, the share of soybeans to corn ratio has been similar to the 3-year average.

During early spring, soybean barge movements are influenced by the harvest of South American soybeans. When new crop Brazilian soybeans become available, U.S. soybean barge volumes begin to decrease, while corn barge volumes begin a gradual increase. However, the timing and size of the Brazilian soybean harvest is just one of the numerous factors that impact the seasonality of U.S. soybean and corn barge movements. Other factors include changes in world supply and demand, changes in U.S. demand for processing and feed use, and transportation disruptions such as flooding, drought, lock repairs and maintenance, channel dredging, and rail congestion.

According to USDA's March 31, 2015 *Prospective Plantings*, growers intend to plant a record 84.6 million acres of soybeans in 2015, up 1 percent from 2014. Growers are expected to plant 89.2 million acres of corn for all purposes in 2015, 2 percent lower than in 2014 and the lowest since 2010. There could be major acreage increases in Arkansas, Iowa, and Ohio, which have direct access to barge transportation. With the possibility of a large soybean crop and large exports, barge operators are anticipating an increased demand for services during the harvest. As of April 28, barge rates in Cincinnati, OH, for October export grain on the Ohio River were being offered at 655 percent of tariff ($30.72/ton), which is higher than the 5-year average October spot rate of 646 percent of tariff ($30.30/ton). Currently, Cincinnati spot barge rates are 295 percent of tariff ($13.84/ton). Barge rates for Davenport, IA, for October export grain on the upper Mississippi River are 640 percent of tariff ($34.05/ton) and match the 5-year average spot rate. Current spot rates are 400 percent of tariff ($21.28/ton). While these forward rates for October barge services are in the average range, there are many factors that can affect transportation costs at harvest time. The size and pace of harvest, export demand, and navigation conditions are just some factors that will determine the cost of shipping grain by barge this fall.
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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
04/29/15	189	238	192	225	139	121
04/22/15	187	240	192	225	139	121

[1]Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = near-month secondary rail market bid and monthly tariff ra with fuel surcharge ($/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

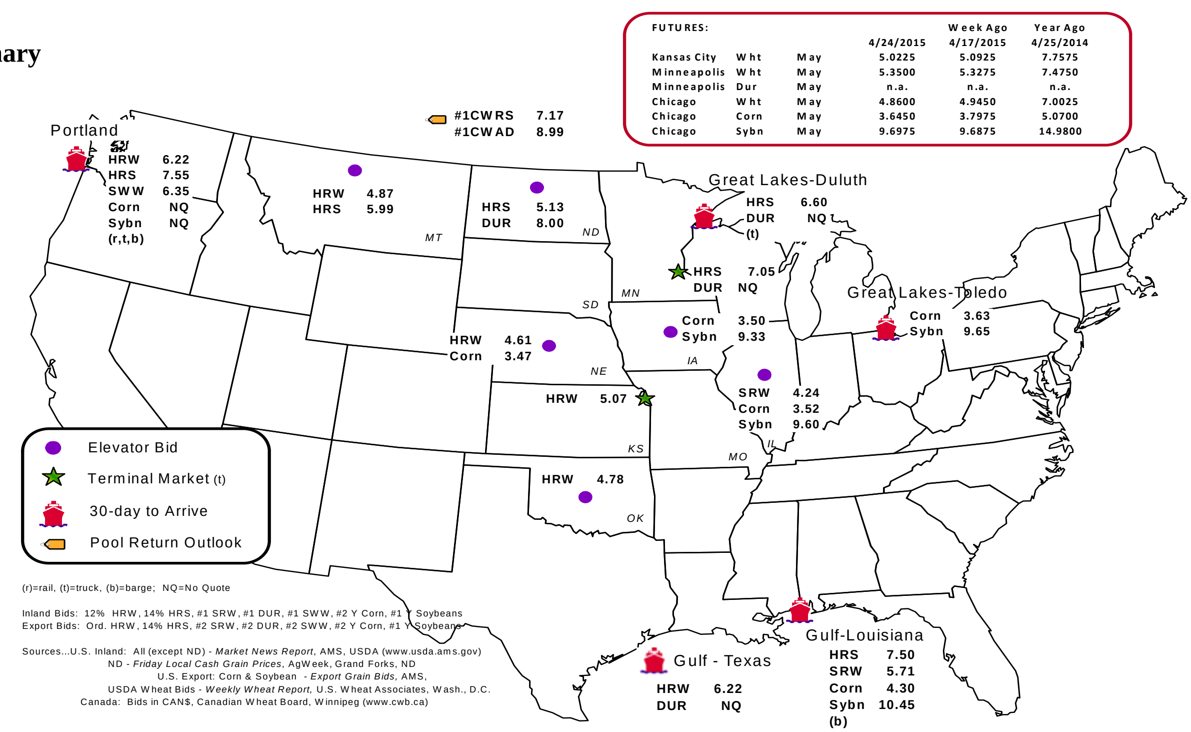
Market Update: U.S. Origins to Export Position Price Spreads ($/bushel)

Commodity	Origin--Destination	4/24/2015	4/17/2015
Corn	IL--Gulf	-0.78	-0.82
Corn	NE--Gulf	-0.83	-0.83
Soybean	IA--Gulf	-1.12	-1.12
HRW	KS--Gulf	-1.15	-1.20
HRS	ND--Portland	-2.42	-2.43

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]
4/22/2015[p]	328	1,806	3,368	247	5,749	4/18/2015	2,295
4/15/2015[r]	2	1,834	4,427	327	6,590	4/11/2015	1,829
2015 YTD[r]	9,796	22,285	88,154	10,707	130,942	2015 YTD	26,499
2014 YTD[r]	17,981	26,179	83,637	13,260	141,057	2014 YTD	27,901
2015 YTD as % of 2014 YTD	54	85	105	81	93	% change YTD	95
Last 4 weeks as % of 2014[2]	28	102	94	48	85	Last 4wks % 2014	98
Last 4 weeks as % of 4-year avg.[2]	58	112	133	82	119	Last 4wks % 4 yr	87
Total 2014	44,621	83,674	256,670	32,107	417,072	Total 2014	96,467
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	71,397

[1] Data is incomplete as it is voluntarily provided

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

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

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

Source: Transportation & Marketing Programs/AMS/USDA

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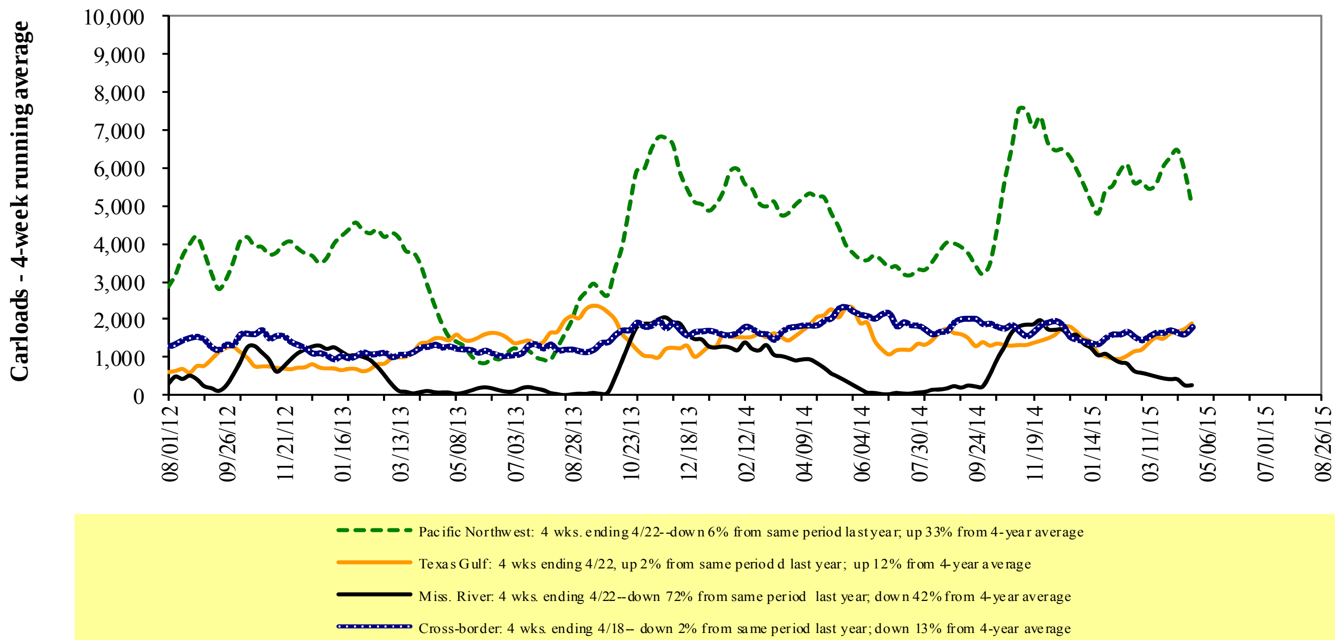
Railroads originate approximately 29 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

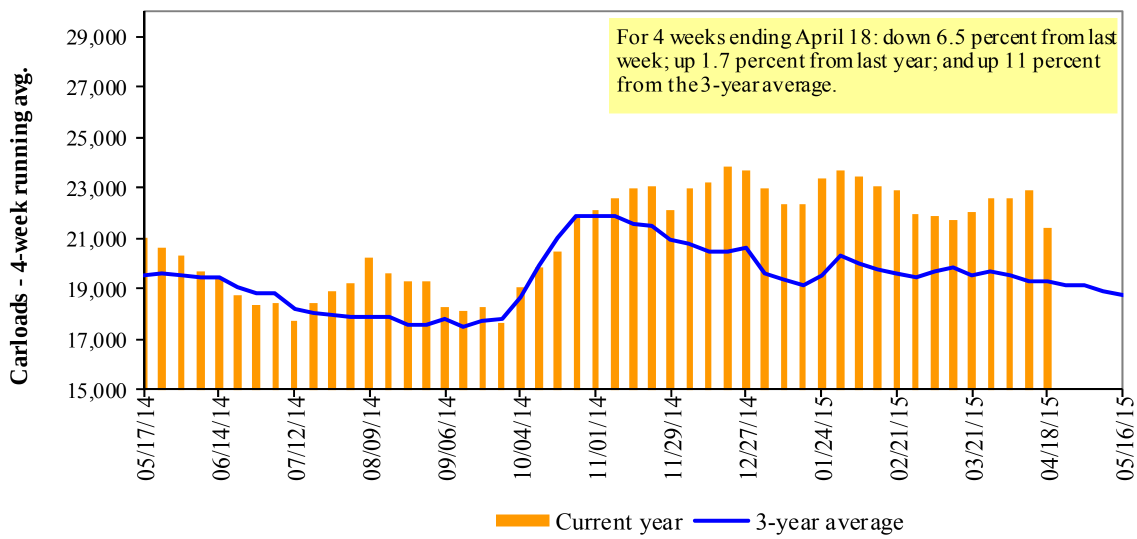
	East		West			U.S. total	Canada	
Week ending	**CSXT**	**NS**	**BNSF**	**KCS**	**UP**		**CN**	**CP**
04/18/15	1,462	2,646	8,519	777	4,762	18,166	4,308	5,507
This week last year	1,846	2,819	10,055	1,035	5,827	21,582	5,111	5,810
2015 YTD	31,545	45,761	163,493	12,878	82,077	335,754	61,580	65,353
2014 YTD	29,742	45,288	131,551	14,271	87,622	308,474	62,731	74,139
2015 YTD as % of 2014 YTD	106	101	124	90	94	109	98	88
Last 4 weeks as % of 2014[1]	98	99	119	106	86	104	81	80
Last 4 weeks as % of 3-yr avg.[2]	107	116	115	163	98	112	98	82
Total 2014	103,331	153,771	482,431	47,510	297,969	1,085,012	242,616	276,322

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

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

Figure 3

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



Source: Association of American Railroads

Table 5

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

Week ending	**Delivery period**							
4/23/2015	**May-15**	**May-14**	**Jun-15**	**Jun-14**	**Jul-15**	**Jul-14**	**Aug-15**	**Aug-14**
BNSF[3]								
COT grain units	no bids	no offer	5	no offer	5	no offer	69	no offer
COT grain single-car[5]	no bids	no offer	no bids	no offer	no bids	no offer	5 . . 27	no offer
UP[4]								
GCAS/Region 1	no bids	no offer	no bids	no offer	no bids	no offer	n/a	n/a
GCAS/Region 2	no bids	no offer	no bids	no offer	no bids	no offer	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.

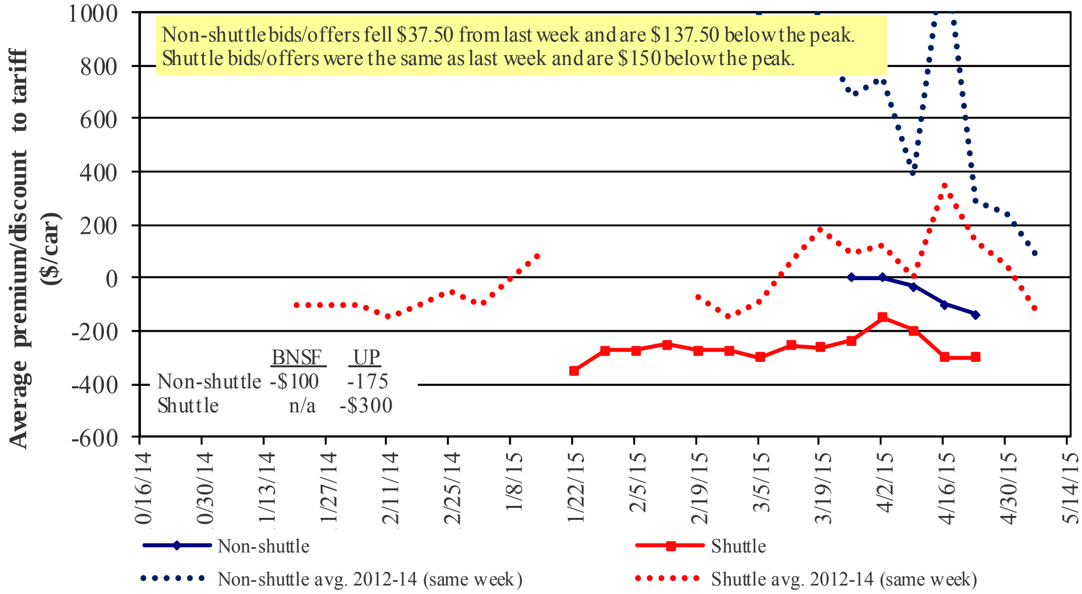
[5]Range is shown because average is not available. Not available = n/a.

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 May 2015, Secondary Market

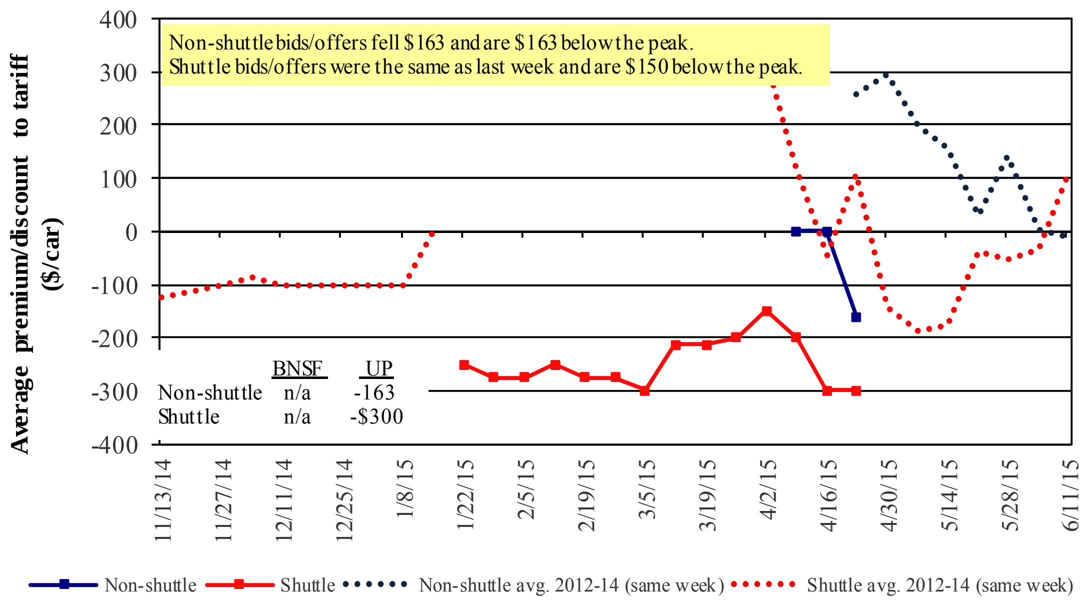


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

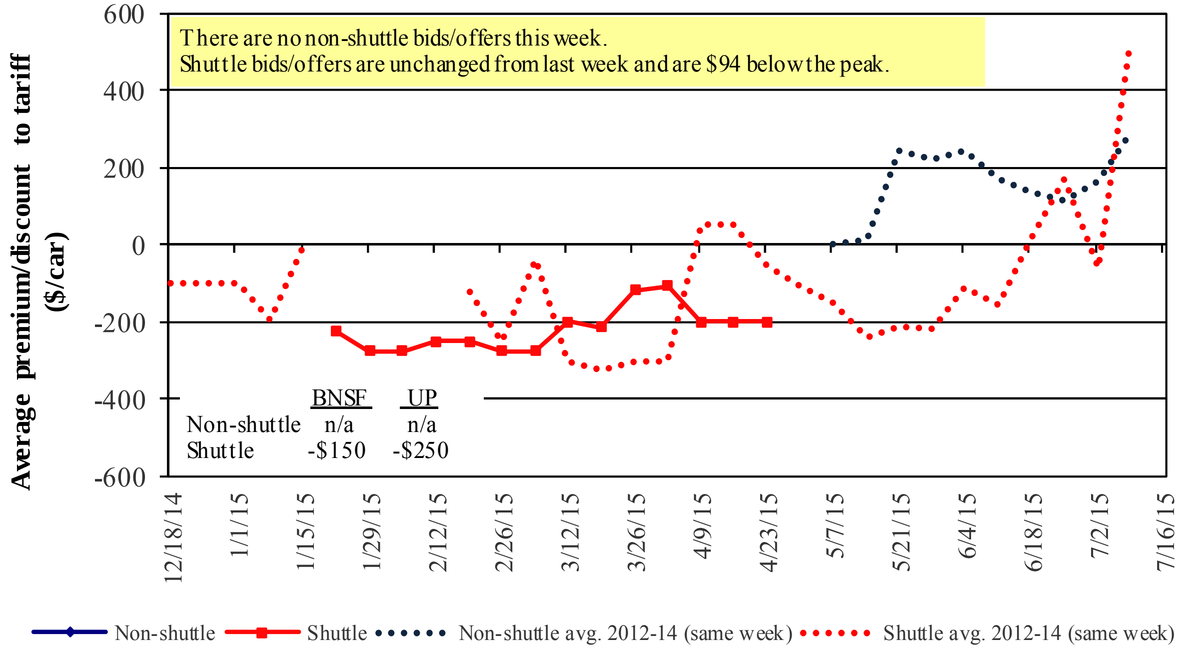


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

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



Non-shuttle bids include unit-train and single-car bids. n/a = not available.
Source: Transportation & Marketing Programs/AMS/USDA

Table 6

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

Week ending	Delivery period					
4/23/2015	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15
Non-shuttle						
BNSF-GF	(100)	n/a	n/a	n/a	n/a	n/a
Change from last week	-	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	(1,600)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(175)	(163)	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 2014	(425)	n/a	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	n/a	n/a	(150)	n/a	n/a	n/a
Change from last week	n/a	n/a	-	n/a	n/a	n/a
Change from same week 2014	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	(300)	(300)	(250)	(250)	(250)	n/a
Change from last week	-	-	-	-	-	n/a
Change from same week 2014	(500)	(400)	(350)	n/a	n/a	n/a

[1]Average premium/discount to tariff, $/car-last week
[2]Shuttle bids are a new data series; prior to this we provided only non-shuttle rates.
Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,
n/a = not available; GF = guaranteed freight; Pool = guaranteed pool
Sources: Transportation and Marketing Programs/AMS/USDA
Data from James B. Joiner Co., Tradewest Brokerage Co.

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

Table 7

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

Effective date: 4/1/2015	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[3]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$3,387	$81	$34.44	$0.94	3
	Grand Forks, ND	Duluth-Superior, MN	$3,596	$27	$35.98	$0.98	-2
	Wichita, KS	Los Angeles, CA	$6,244	$138	$63.37	$1.72	-7
	Wichita, KS	New Orleans, LA	$4,026	$142	$41.39	$1.13	1
	Sioux Falls, SD	Galveston-Houston, TX	$5,824	$113	$58.96	$1.60	-6
	Northwest KS	Galveston-Houston, TX	$4,293	$156	$44.18	$1.20	0
	Amarillo, TX	Los Angeles, CA	$4,492	$217	$46.76	$1.27	-2
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,328	$161	$34.65	$0.88	-2
	Toledo, OH	Raleigh, NC	$5,555	$191	$57.06	$1.45	12
	Des Moines, IA	Davenport, IA	$2,168	$34	$21.87	$0.56	2
	Indianapolis, IN	Atlanta, GA	$4,761	$143	$48.70	$1.24	12
	Indianapolis, IN	Knoxville, TN	$4,104	$92	$41.67	$1.06	14
	Des Moines, IA	Little Rock, AR	$3,308	$100	$33.84	$0.86	-1
	Des Moines, IA	Los Angeles, CA	$4,852	$292	$51.08	$1.30	-13
Soybeans	Minneapolis, MN	New Orleans, LA	$3,664	$142	$37.79	$1.03	-1
	Toledo, OH	Huntsville, AL	$4,676	$135	$47.78	$1.30	20
	Indianapolis, IN	Raleigh, NC	$5,625	$192	$57.76	$1.57	12
	Indianapolis, IN	Huntsville, AL	$4,368	$92	$44.29	$1.21	24
	Champaign-Urbana, IL	New Orleans, LA	$3,974	$161	$41.06	$1.12	0
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,678	$79	$37.31	$1.02	-6
	Wichita, KS	Galveston-Houston, TX	$3,471	$62	$35.08	$0.95	-13
	Chicago, IL	Albany, NY	$4,723	$179	$48.68	$1.32	13
	Grand Forks, ND	Portland, OR	$5,159	$137	$52.59	$1.43	-8
	Grand Forks, ND	Galveston-Houston, TX	$6,084	$142	$61.83	$1.68	-7
	Northwest KS	Portland, OR	$5,260	$256	$54.77	$1.49	-2
Corn	Minneapolis, MN	Portland, OR	$5,000	$167	$51.31	$1.30	-9
	Sioux Falls, SD	Tacoma, WA	$4,960	$153	$50.77	$1.29	-9
	Champaign-Urbana, IL	New Orleans, LA	$3,147	$161	$32.85	$0.83	-3
	Lincoln, NE	Galveston-Houston, TX	$3,510	$89	$35.74	$0.91	-7
	Des Moines, IA	Amarillo, TX	$3,690	$126	$37.89	$0.96	-2
	Minneapolis, MN	Tacoma, WA	$5,000	$165	$51.29	$1.30	-9
	Council Bluffs, IA	Stockton, CA	$4,400	$171	$45.39	$1.15	-11
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,520	$153	$56.33	$1.53	-8
	Minneapolis, MN	Portland, OR	$5,530	$167	$56.57	$1.54	-9
	Fargo, ND	Tacoma, WA	$5,430	$136	$55.27	$1.50	-7
	Council Bluffs, IA	New Orleans, LA	$4,425	$186	$45.79	$1.25	0
	Toledo, OH	Huntsville, AL	$3,851	$135	$39.59	$1.08	26
	Grand Island, NE	Portland, OR	$5,360	$262	$55.83	$1.52	-2

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

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

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

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

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

Table 8

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

Effective date: 4/1/2015 Commodity	Origin state	Destination region	Tariff rate/car[1]	Fuel surcharge per car[2]	Tariff plus surcharge per: metric ton[3]	bushel[3]	Percent change Y/Y[4]
Wheat	MT	Chihuahua, CI	$6,960	$145	$72.59	$1.97	2
	OK	Cuautitlan, EM	$6,565	$176	$68.87	$1.87	-2
	KS	Guadalajara, JA	$7,010	$170	$73.36	$1.99	-4
	TX	Salinas Victoria, NL	$3,885	$66	$40.38	$1.10	0
Corn	IA	Guadalajara, JA	$8,349	$200	$87.34	$2.22	-3
	SD	Celaya, GJ	$7,656	$189	$80.16	$2.03	-7
	NE	Queretaro, QA	$7,568	$177	$79.14	$2.01	-4
	SD	Salinas Victoria, NL	$5,880	$144	$61.55	$1.56	-7
	MO	Tlalnepantla, EM	$6,920	$172	$72.47	$1.84	-5
	SD	Torreon, CU	$6,922	$159	$72.35	$1.84	-4
Soybeans	MO	Bojay (Tula), HG	$8,311	$168	$86.64	$2.36	-1
	NE	Guadalajara, JA	$8,872	$193	$92.61	$2.52	-2
	IA	El Castillo, JA	$9,155	$188	$95.47	$2.60	-3
	KS	Torreon, CU	$7,189	$120	$74.67	$2.03	-1
Sorghum	TX	Guadalajara, JA	$7,253	$123	$75.37	$1.91	-1
	NE	Celaya, GJ	$7,287	$172	$76.21	$1.93	-6
	KS	Queretaro, QA	$6,845	$108	$71.04	$1.80	-2
	NE	Salinas Victoria, NL	$5,550	$126	$58.00	$1.47	-4
	NE	Torreon, CU	$6,518	$141	$68.04	$1.73	-3

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

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

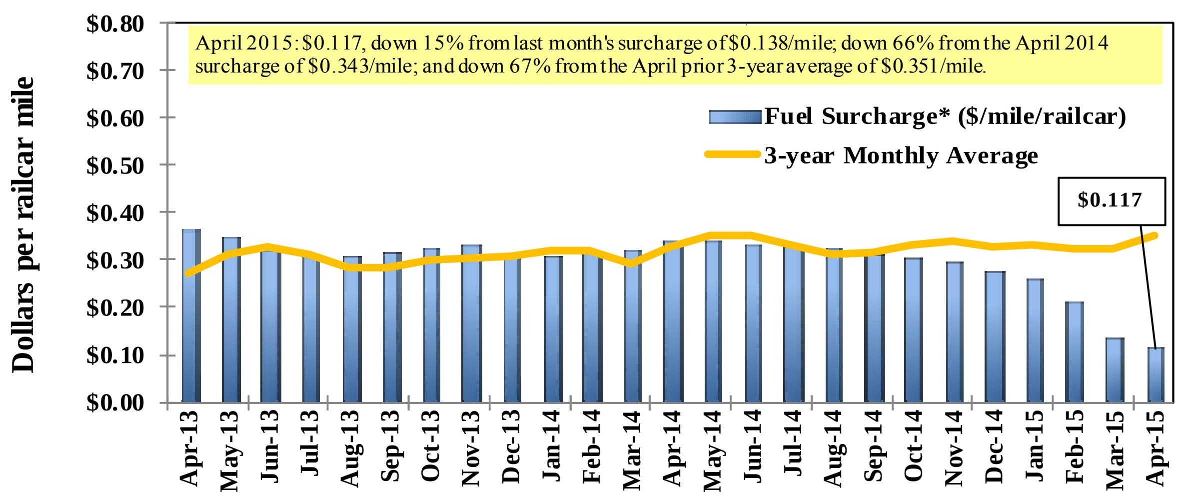
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average[1]



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

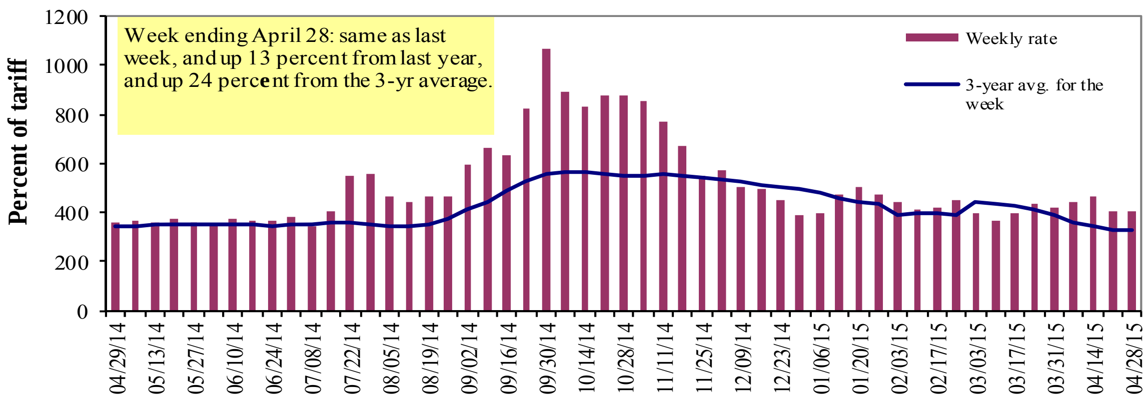
* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

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

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

Barge Transportation

Figure 8
Illinois River Barge Freight Rate[1,2]



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
Rate[1]	4/28/2015	413	400	405	298	295	295	270
	4/21/2015	420	412	405	335	323	323	285
$/ton	4/28/2015	25.56	21.28	18.79	11.89	13.84	11.92	8.48
	4/21/2015	26.00	21.92	18.79	13.37	15.15	13.05	8.95
Current week % change from the same week:								
	Last year	-11	7	13	22	8	8	31
	3-year avg. [2]	-4	14	24	26	15	15	35
Rate[1]	May	400	380	375	268	268	268	245
	July	395	380	370	265	255	255	265

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds
Source: Transportation & Marketing Programs/AMS/USDA

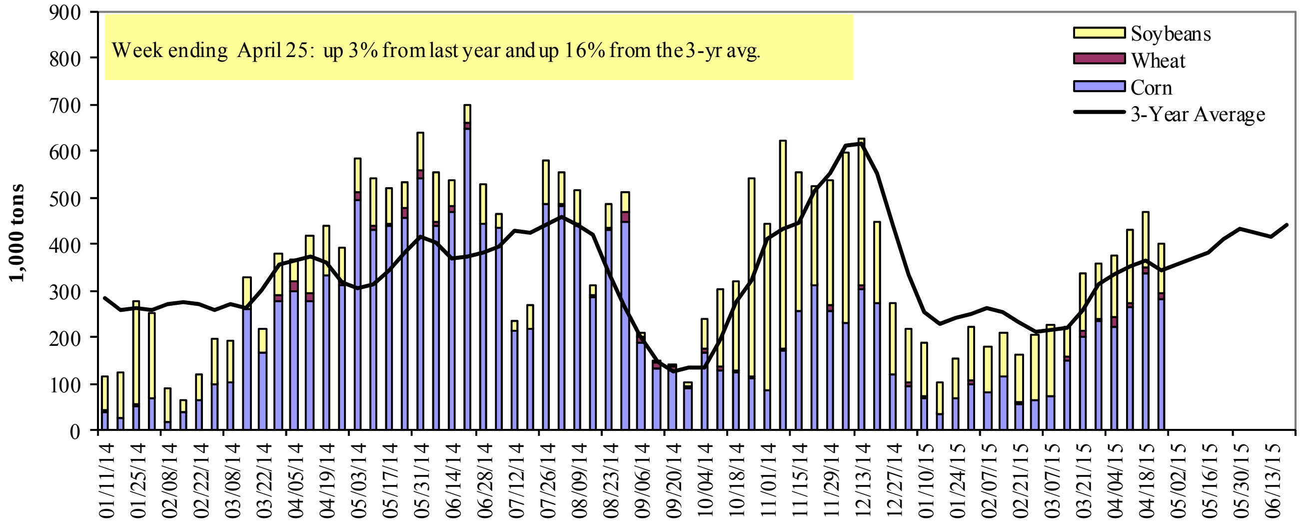
Figure 9
Benchmark tariff rates

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

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

Figure 10

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



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

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

Week ending 04/25/2015	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	84	11	61	0	156
Winfield, MO (L25)	165	11	95	0	271
Alton, IL (L26)	255	11	95	11	372
Granite City, IL (L27)	282	11	107	11	411
Illinois River (L8)	78	0	2	11	90
Ohio River (L52)	180	15	47	0	242
Arkansas River (L1)	0	20	14	1	35
Weekly total - 2015	462	45	169	12	688
Weekly total - 2014	497	27	93	6	624
2015 YTD[1]	5,106	435	3,781	82	9,403
2014 YTD	5,869	558	3,521	61	10,010
2015 as % of 2014 YTD	87	78	107	134	94
Last 4 weeks as % of 2014[2]	96	87	157	162	106
Total 2014	20,693	2,181	11,813	258	34,946

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

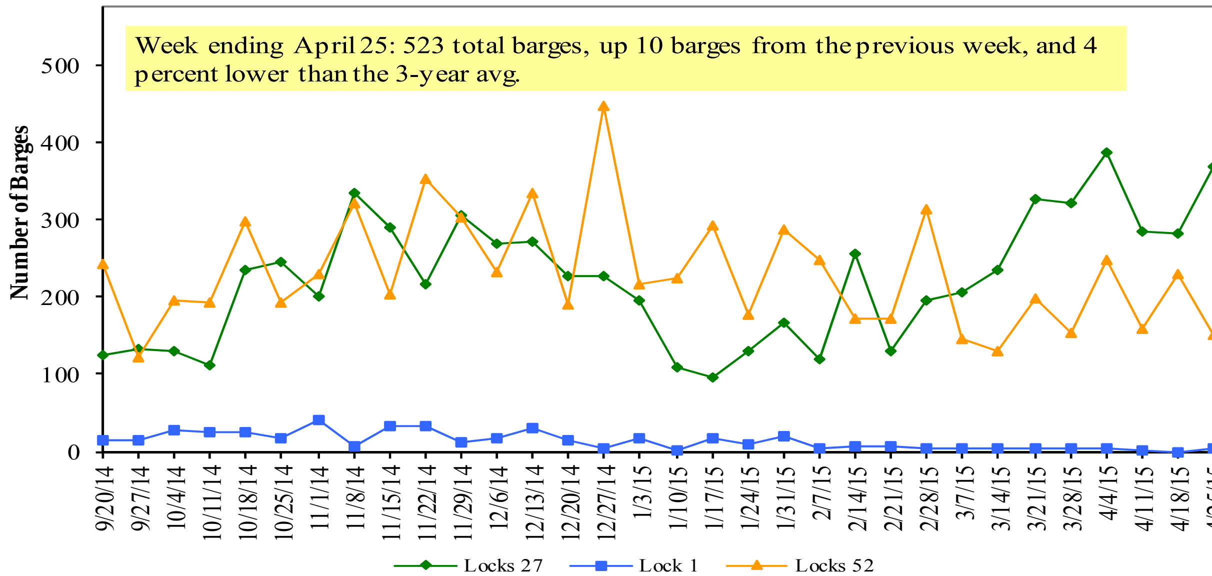
[2] As a percent of same period in 2014.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers

Figure 11

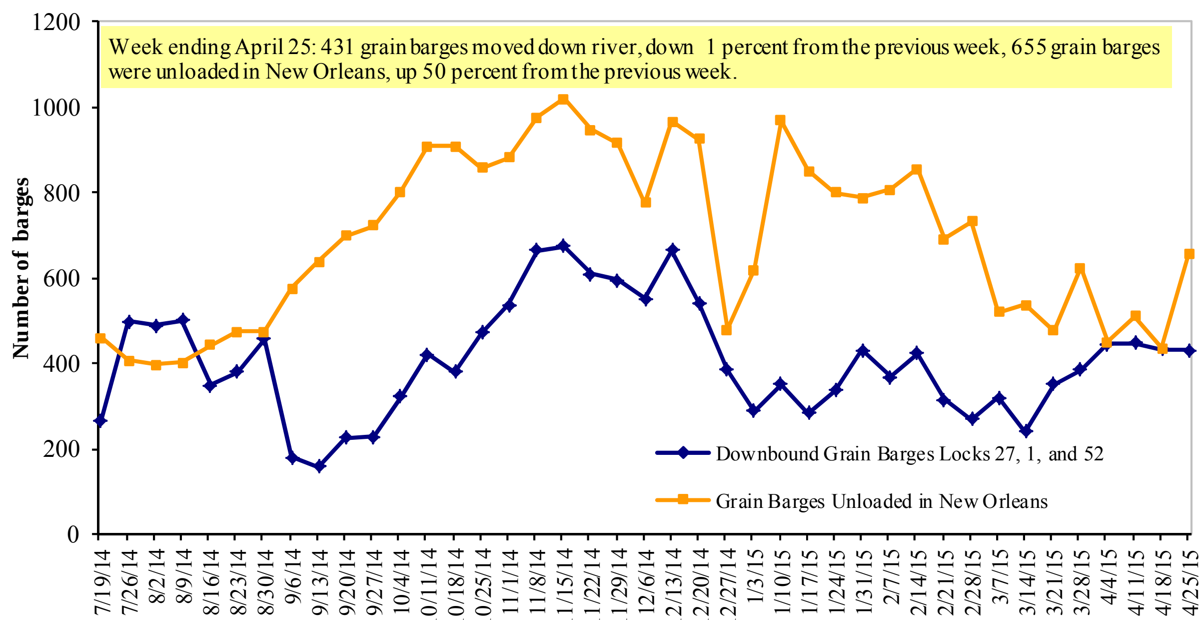
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



Source: U.S. Army Corps of Engineers

Figure 12

Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices[1], Week Ending 04/27/2014 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.949	0.023	-1.116
	New England	3.057	0.008	-1.151
	Central Atlantic	3.110	0.029	-1.075
	Lower Atlantic	2.806	0.023	-1.143
II	Midwest[2]	2.691	0.032	-1.256
III	Gulf Coast[3]	2.683	0.024	-1.141
IV	Rocky Mountain	2.731	0.018	-1.251
V	West Coast	3.026	0.061	-1.029
	West Coast less California	2.865	0.069	-1.089
	California	3.156	0.054	-0.984
Total	U.S.	2.811	0.031	-1.164

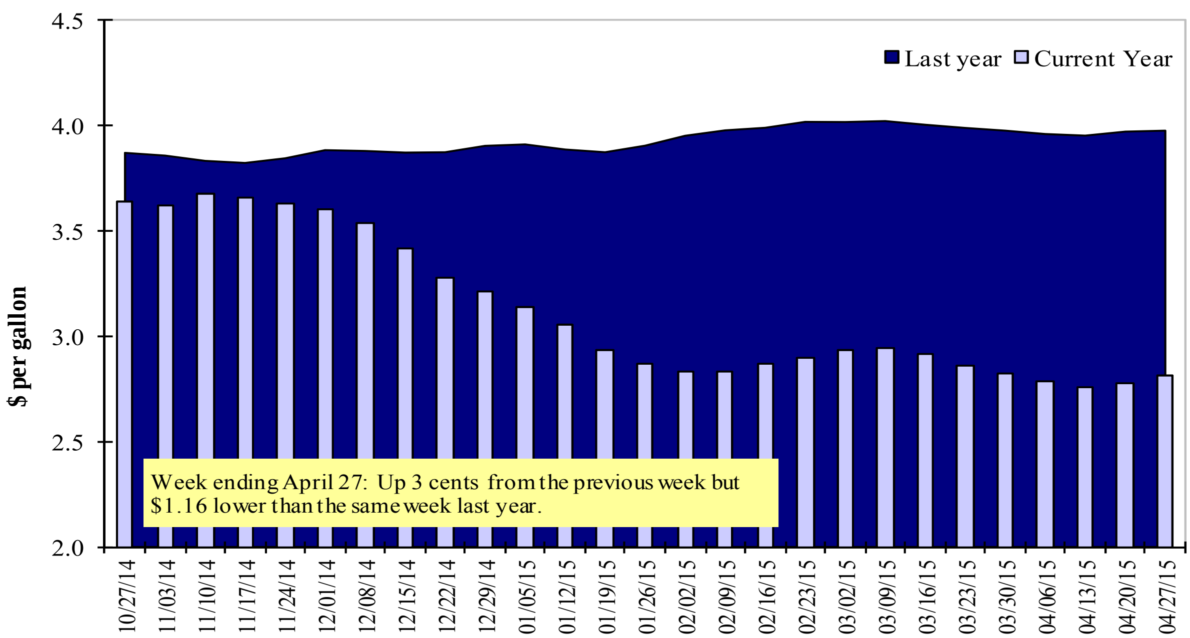
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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)

Week ending	Wheat HRW	SRW	HRS	SWW	DUR	All wheat	Corn	Soybeans	Total
Export Balances[1]									
4/16/2015	1,161	556	1,322	679	82	3,801	13,912	3,499	21,212
This week year ago	1,504	637	1,472	712	138	4,464	16,440	2,893	23,797
Cumulative exports-marketing year[2]									
2014/15 YTD	6,235	3,237	6,443	3,353	607	19,875	25,573	45,140	90,588
2013/14 YTD	10,160	6,882	5,447	3,707	398	26,594	26,631	41,717	94,942
YTD 2014/15 as % of 2013/14	61	47	118	90	153	75	96	108	95
Last 4 wks as % of same period 2013/14	86	101	97	90	67	92	87	134	94
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293

[1] Current unshipped export sales to date

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

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

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

Table 13

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

Week ending 04/16/2015	Total Commitments[2] 2014/15 Current MY	2013/14 Last MY	% change current MY from last MY	Exports[3] 3-year avg 2011-2013
	- 1,000 mt -			- 1,000 mt -
Japan	8,761	9,279	(6)	10,079
Mexico	9,445	9,371	1	8,145
Korea	2,761	3,152	(12)	2,965
Colombia	3,469	2,630	32	3,461
Taiwan	1,382	1,480	(7)	1,238
Top 5 Importers	**25,818**	**25,911**	**(0)**	**25,887**
Total US corn export sales	**39,484**	**43,070**	**(8)**	**34,445**
% of Projected	86%	88%		
Change from prior week	868	619		
Top 5 importers' share of U.S. corn export sales	65%	60%		75%
USDA forecast, April 2015	**45,720**	**48,700**	**(6)**	
Corn Use for Ethanol USDA forecast, April 2015	**132,080**	**130,404**	**1**	

(n) indicates negative number.

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

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

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

Table 14

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

Week Ending 04/16/2015	Total Commitments[2] 2014/15 Current MY	2013/14 Last MY	% change current MY from last MY	Exports[3] 3-yr avg. 2011-13
	- 1,000 mt -			- 1,000 mt -
China	29,697	27,603	8	24,211
Mexico	2,945	3,016	(2)	2,971
Indonesia	1,567	1,979	(21)	1,895
Japan	1,617	1,709	(5)	1,750
Taiwan	1,122	1,099	2	1,055
Top 5 importers	**36,946**	**35,404**	**4**	**31,882**
Total US soybean export sales	**48,639**	**44,610**	**9**	**39,169**
% of Projected	100%	100%		
Change from prior week*	102	1		
Top 5 importers' share of U.S. soybean export sales	76%	79%		**81%**
USDA forecast, April 2015	**48,720**	**44,820**	**9**	

(n) indicates negative number.

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

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

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

* Includes revisions to previous week's data.

Table 15

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

Week Ending 04/16/2015	Total Commitments[2] 2014/15 Current MY	2013/14 Last MY	% change current MY from last MY	Exports[3] 3-yr avg 2011-2013
	- 1,000 mt -			- 1,000 mt -
Japan	3,037	2,994	1	3,243
Mexico	2,763	3,043	(9)	3,066
Nigeria	1,959	2,655	(26)	2,960
Philippines	2,364	2,035	16	2,006
China	436	4,259	(90)	1,830
Brazil	1,534	4,067	(62)	1,617
Korea	1,287	1,307	(2)	1,552
Taiwan	1,032	1,020	1	969
Indonesia	635	1,030	(38)	813
Colombia	560	724	(23)	610
Top 10 importers	**15,605**	**23,135**	(33)	**18,665**
Total US wheat export sales	**23,676**	**31,057**	**(24)**	**27,696**
% of Projected	99%	97%		
Change from prior week*	398	339		
Top 10 importers' share of U.S. wheat export sales	66%	74%		67%
USDA forecast, April 2015	**23,950**	**32,010**	**(25)**	

(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 04/23/15	Previous Week[1]	Current Week as % of Previous	2015 YTD[1]	2014 YTD[1]	2015 YTD as % of 2014 YTD	Last 4-weeks as % of 2014	Last 4-weeks as % of 3-yr. avg.	Total[1] 2014
Pacific Northwest									
Wheat	345	323	107	3,919	3,823	103	80	79	12,436
Corn	227	300	76	3,288	2,187	150	106	183	7,781
Soybeans	0	33	0	4,034	4,463	90	133	117	12,887
Total	**572**	**656**	**87**	**11,241**	**10,473**	**107**	**97**	**113**	**33,104**
Mississippi Gulf									
Wheat	0	61	0	1,241	1,433	87	54	42	4,495
Corn	794	620	128	8,717	10,329	84	63	118	30,912
Soybeans	244	41	593	9,180	9,263	99	118	120	29,087
Total	**1,037**	**722**	**144**	**19,138**	**21,025**	**91**	**69**	**104**	**64,495**
Texas Gulf									
Wheat	130	134	97	1,283	2,013	64	92	85	6,120
Corn	29	0	n/a	204	185	110	70	47	580
Soybeans	0	0	n/a	182	254	72	n/a	0	949
Total	**159**	**134**	**119**	**1,669**	**2,453**	**68**	**90**	**82**	**7,649**
Interior									
Wheat	34	54	62	443	385	115	61	149	1,400
Corn	153	104	148	1,771	1,658	107	83	106	5,677
Soybeans	68	55	124	1,246	1,511	82	75	78	4,312
Total	**255**	**212**	**120**	**3,460**	**3,553**	**97**	**116**	**101**	**11,389**
Great Lakes									
Wheat	18	22	83	51	0	n/a	n/a	59	935
Corn	50	24	206	75	0	n/a	n/a	1,429	288
Soybeans	0	6	0	6	0	n/a	n/a	64	988
Total	**68**	**52**	**132**	**132**	**0**	**n/a**	**n/a**	**148**	**2,211**
Atlantic									
Wheat	17	24	73	214	53	404	356	2,291	553
Corn	16	0	n/a	40	157	25	19	40	816
Soybeans	12	16	72	800	949	84	51	127	2,119
Total	**45**	**40**	**112**	**1,053**	**1,159**	**91**	**61**	**145**	**3,487**
U.S. total from ports[2]									
Wheat	544	616	88	7,152	7,708	93	83	76	25,939
Corn	1,270	1,048	121	14,094	14,515	97	75	128	46,054
Soybeans	323	151	214	15,448	16,440	94	104	110	50,342
Total	**2,137**	**1,816**	**118**	**36,694**	**38,663**	**95**	**82**	**106**	**122,335**

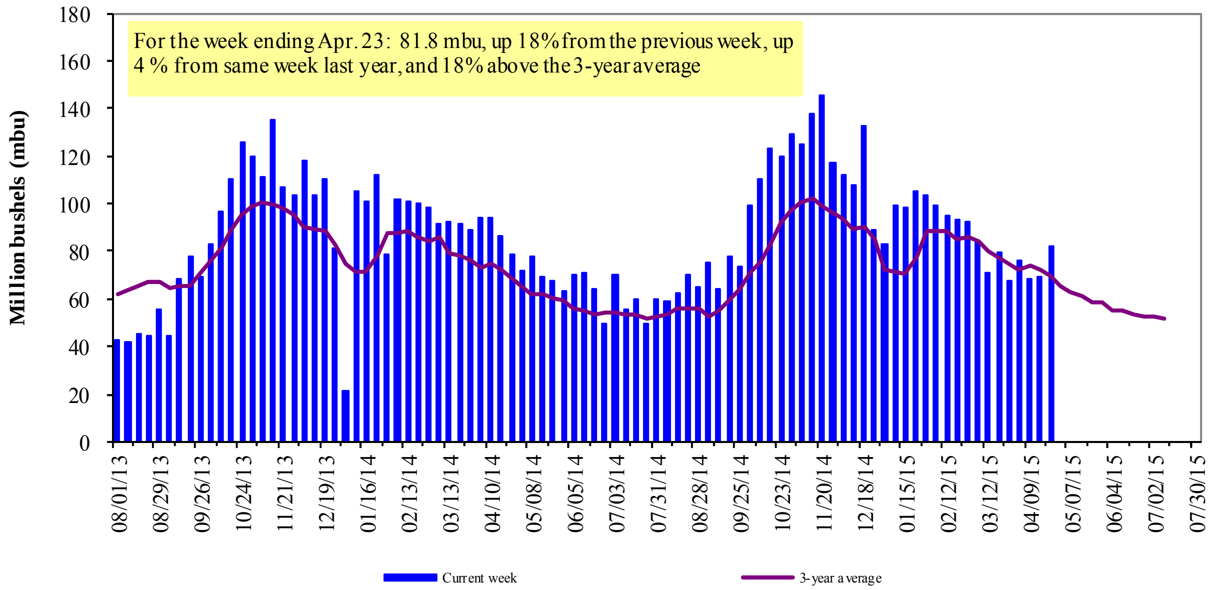
[1] Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

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

Figure 14

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

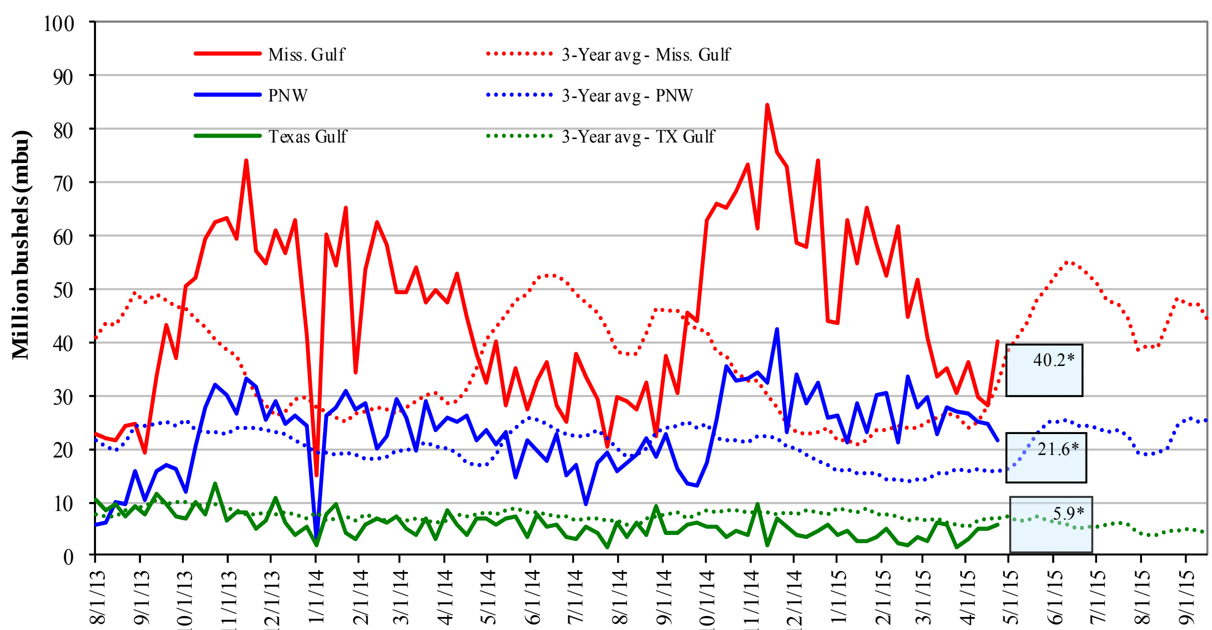


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

Apr. 23: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 43	up 20	up 40	down 13
Last year (same week)	up 7	down 16	up 3	down 0.4
3-yr avg. (4-wk mov. avg.	up 25	up 1	up 22	up 13

Ocean Transportation

Table 17

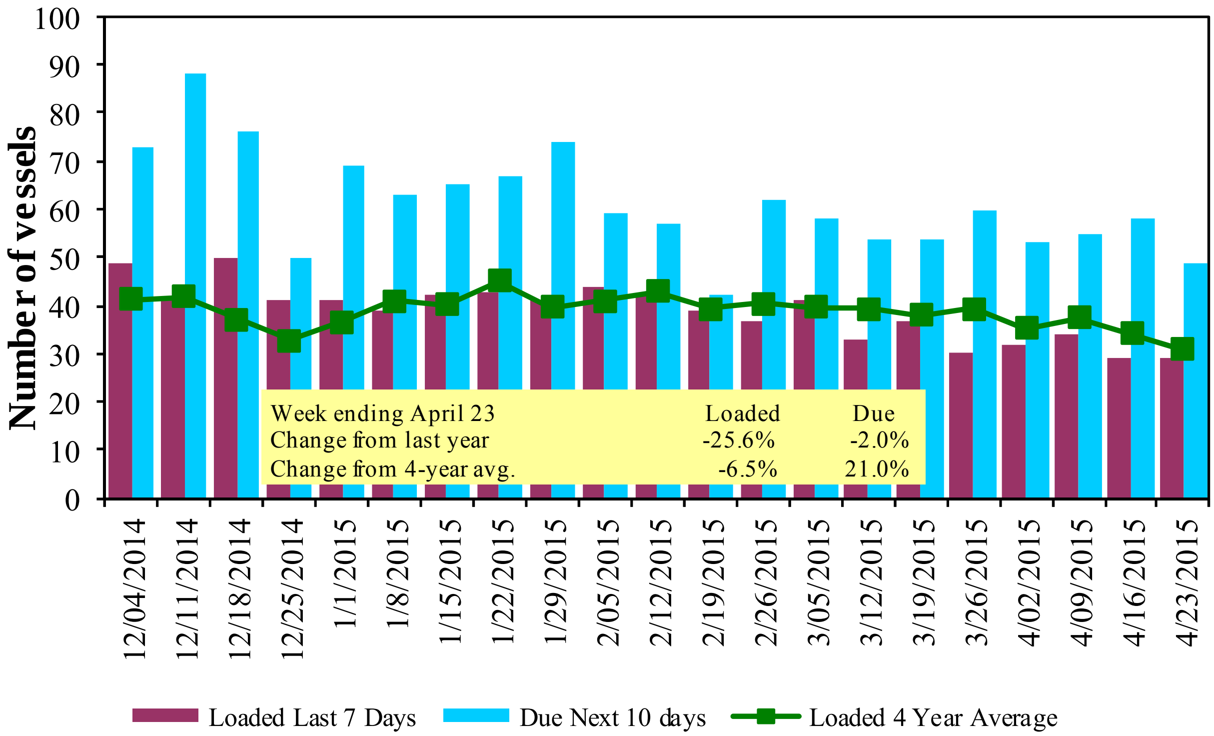
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
4/23/2015	48	29	49	7	n/a
4/16/2015	48	29	58	10	n/a
2014 range	(18..88)	(24..52)	(27..97)	(6..26)	n/a
2014 avg.	46	39	59	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

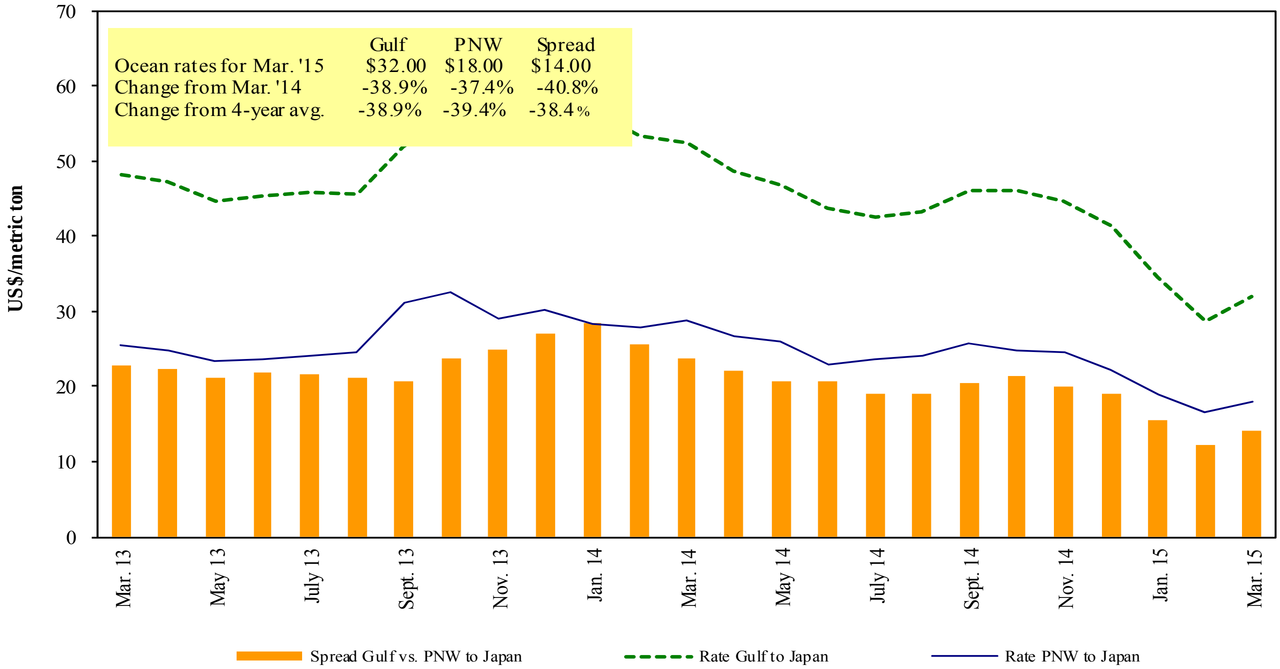
U.S. Gulf[1] Vessel Loading Activity



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

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 4/25/2015

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Djibouti[1]	Wheat	Apr 21/May 4	4,530	88.60
U.S. Gulf	Pt. Sudan[1]	Sorghum	Apr 17/25	47,500	82.75
PNW	China	Grain	Mar 16/25	60,000	15.25
Brazil	China	Heavy Grain	May 20/30	60,000	22.75
Brazil	China	Heavy Grain	Jun 1/30	60,000	22.75
Brazil	China	Grain	Apr 15/May 31	60,000	24.50
Brazil	China	Heavy Grain	May 6/14	60,000	22.60
Brazil	China	Heavy Grain	May 15/10	60,000	22.75
Brazil	China	Grain	May 1/10	60,000	22.50
Brazil	China	Heavy Grain	May 1/10	60,000	23.00
Brazil	China	Heavy Grain	May 1/10	60,000	22.50
Brazil	China	Heavy Grain	Apr 21/30	60,000	30.00
Canada	China	Heavy Grain	Jun 1/10	60,000	14.00
France	China	Barley	Apr 16/25	63,000	26.00
Germany	Iran	Wheat	May 10/15	60,000	24.75

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

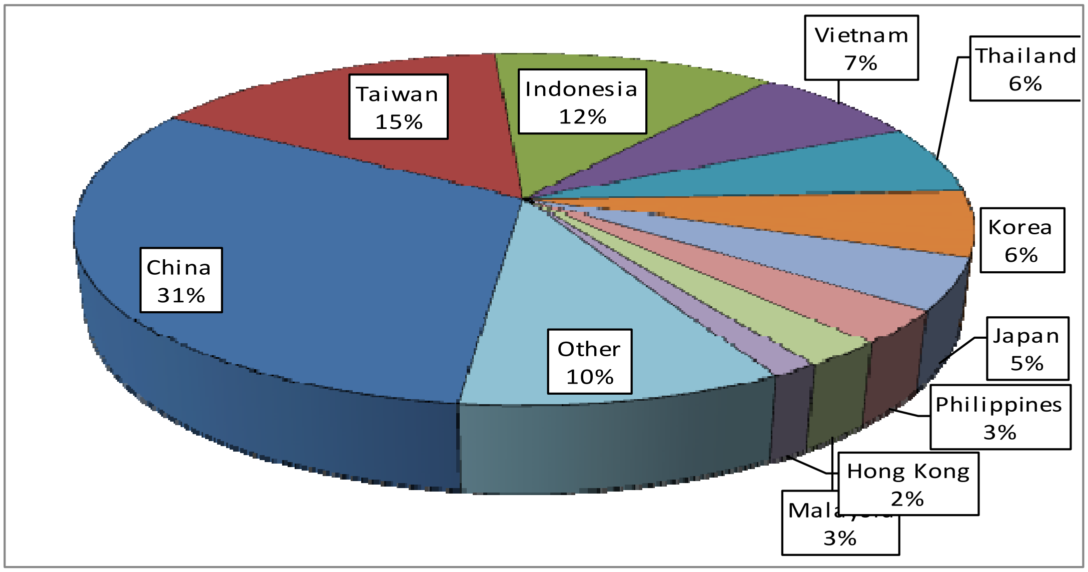
[1]50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

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

Figure 18

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

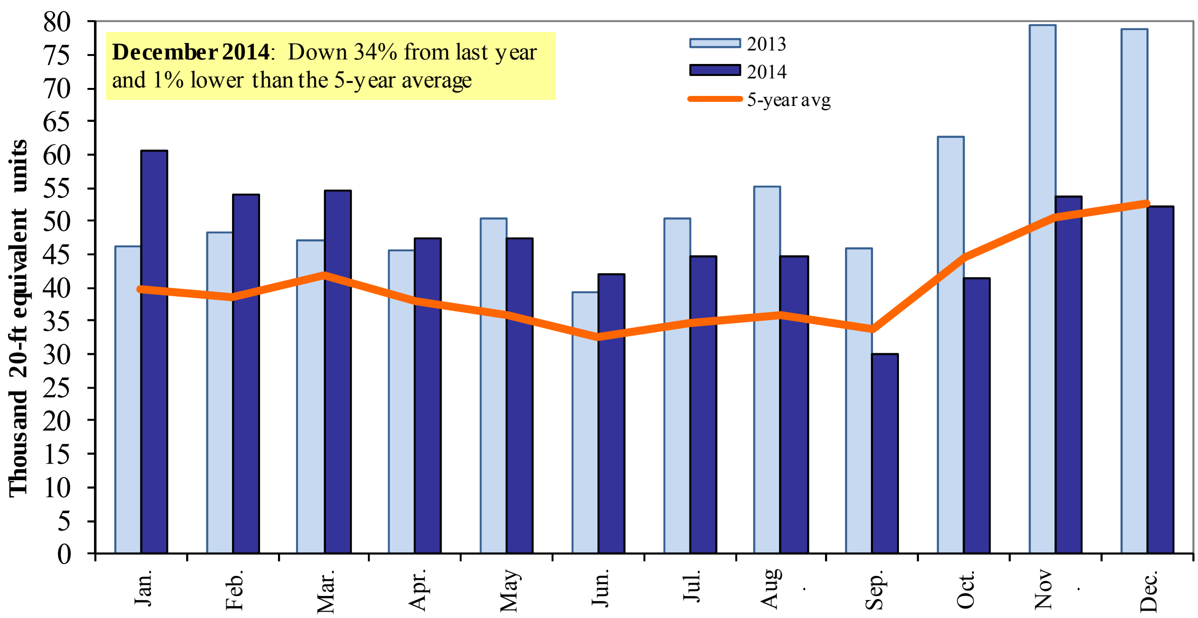


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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

Figure 19

Monthly Shipments of Containerized Grain to Asia



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

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

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