



Grain Transportation Report

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

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WEEKLY HIGHLIGHTS

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Grain Inspections Rebound

For the week ending April 25, **total inspections** of all major grains (corn, wheat, and soybeans) rebounded, reaching 1.38 million metric tons (mmt), up 20 percent from the past week but 14 percent below last year at this time. Inspections increased in each of the major export regions as demand for soybeans and wheat increased. Total soybean inspections (.243 mmt) jumped 124 percent from the previous week as shipments to Asia increased. Total wheat inspections (.841 mmt) increased 17 percent from the past week and were 13 percent above the 4-week running average. Wheat inspections were also the highest since March 8, 2012 (.864 mmt). Total corn (.295 mmt) inspected for export from all major export regions was down 9 percent. Current outstanding (unshipped) export sales are down for wheat and soybeans but unchanged for corn.

Weather Delays Keep Corn Planting Behind Schedule

The latest USDA Crop Progress Report shows only 5 percent of the corn crop has been planted so far this year, compared with 49 percent at this time last year and 31 percent for the five-year average. Farmers across the Corn Belt have been prevented from planting by cold weather and wet soil. Above-normal precipitation in May is forecast for the Corn Belt. Currently, only 2 percent has been planted in Iowa, compared to 44 percent last year at this time, while Illinois and Indiana have only planted 1 percent, compared to 76 and 67 percent last year, respectively. If planting is delayed too long, corn acres and yields could be lower, indicating lower-than-usual demand for transportation at harvest. However, a chance of favorable weather in May could improve planting progress.

Four-Week Grain Carloads Lowest on Record

U.S. railroads originated 15,670 **carloads of grain** during the week ending April 20, down 9 percent from last week, 22 percent from last year, and 27 percent from the 3-year average. Total carloads of grain (65,096) for the 4 weeks ending April 20 were the lowest on record, compared with 80,442 for the same four weeks last year and 86,307 for the five-year average. In addition to the drought's impact on grain production, Rail Business reports that lower grain shipments are possibly being influenced by producers unwilling to sell surplus wheat at current prices. However, this year's late planting may lower the supply and entice producers to sell if wheat prices continue climbing. Wheat prices reached a 1-month high Tuesday following USDA reports of declining good/excellent winter wheat ratings and increasing poor/very poor ratings on Monday.

Mississippi River Conditions Improving, Sections of Illinois River Shut Down; Additional Rain May Slow Recovery

The spring snowmelt and heavy rainfall is causing flooding on the Illinois River. Although the Illinois River crested on April 30, flood waters have been slow to recede because of the rain and backwater pressure at the confluence of the Illinois River with the flooded Mississippi River. Locks on the Upper Mississippi River are opened and water levels have crested north of St. Louis, MO. Crests on the lower Mississippi River will occur during the first half of May, but will not affect navigation. The upper Illinois River is closed at Marseilles, where a dam was damaged, shutting down the navigation channel. On the lower Illinois River, a section was closed because waves from the moving barges were reporting to have damaged levees. The lower Illinois River was reopened on May 1 after restrictions were enacted to require tows to travel at minimum speeds with little or no wake. The Marseilles Lock is still closed. Daily rounds of heavy rain and snow are expected from Wednesday to Saturday throughout the Mississippi River watershed, possibly slowing the recovery.

Snapshots by Sector

Rail

During the week ending April 25, average May non-shuttle **secondary railcar bids/offers per car** were at tariff, unchanged from last week, and \$5 higher than last year. Average shuttle bids/offers were \$104.50 below tariff, up \$108 from last week, and \$224.50 higher than last year.

Barge

During the week ending April 27, **barge grain movements** totaled 118,000 tons, 83 percent lower than the previous week and 81 percent lower than the same period last year.

During the week ending April 27, 76 grain barges **moved down river**, down 57.3 percent from last week; 278 grain barges were **unloaded in New Orleans**, down 26.5 percent from the previous week.

Ocean

During the week ending April 25, 25 **ocean-going grain vessels** were loaded in the Gulf, 7 percent less than the same period last year. Thirty-one vessels are expected to be loaded within the next 10 days, 9 percent less than the same period last year.

During the week ending April 26, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$46.50 per mt, 2 percent lower than the previous week. The cost of shipping from the Pacific Northwest to Japan was \$24.50 per mt, 2 percent lower than the previous week.

Fuel

During the week ending April 29, U.S. average **diesel fuel prices** were down 4 cents from the previous week to \$3.85 per gallon—22 cents lower than the same week last year.

Feature Article/Calendar

Excess Vessel Supply Keeps Bulk Ocean Freight Rates Low; New Vessel Orders Slow

Excess vessel supply and lagging demand for bulk shipments are keeping ocean freight rates for shipping bulk commodities—including grain—moderately low. Although robust, orders for newly built vessels are lower than in recent years. During the first quarter of 2013, ocean freight rates for shipping bulk grains from the U.S. Gulf to Japan averaged \$46.73 per metric ton (mt)—7 percent less than a year ago and 10 percent less than the 4-year average (table 1). It costs about \$24.84 per mt to ship grain from the Pacific Northwest (PNW) to Japan—12 percent less than a year ago and 16 percent less than the 4-year average. The cost of shipping from the Gulf to Rotterdam (Europe) was \$19.57 per mt, 2 percent less than a year earlier, and 8 percent less than the 4-year average. The spread between the Gulf and PNW rates, at \$21.89 per mt, was 2 percent lower than the 4-year average.

Table 1. Ocean freight rates for grain routes during first quarter 2013

Route	Jan.	Feb.	Mar.	1 st quarter 2013	Change from		
					4 th qtr '12	1 st qtr '12	4-yr avg
	--\$/mt--			--\$/mt--	Percent		
U.S. Gulf to Japan	45.75	46.25	48.20	46.73	-0.1	-7	-10
PNW to Japan	24.75	24.38	25.40	24.84	-4.1	-12	-16
U.S. Gulf to Europe	18.63	18.88	21.20	19.57	5	-2	-8
Spread	21.00	21.87	22.80	21.89	5	0	-2

Source: O'Neil Commodity Consulting

The bulk vessel fleet has grown during recent years, making it difficult for the lackluster demand to catch up with supply. During 2012, the dry bulk fleet grew by 70 million deadweight tons (mdwt). As of December 17, 19.5 mdwt

capacity of Panamax vessels were delivered by the shipyards, compared to 15.4 mdwt in 2011.

The total dry bulk fleet is expected to grow by 6 percent in 2013. Currently the global dry bulk operating fleet as of March stands at 687.7 mdwt capacity (table 2), compared to 625 mdwt in March 2012. During the same period, the total capacity of

Panamax vessels increased from 106.3 mdwt to 108.8 mdwt. Although the rate has slowed, owners are still placing orders for new deliveries. About 126.86 mdwt capacity of new dry bulk vessels are scheduled for delivery between now and 2016—18.4 percent of the existing fleet (table 3). During the same time a year ago, the scheduled delivery from

Table 2: Global dry bulk operating fleet, March 2013

Type of vessel	Size (dwt)	No. of vessels	Capacity (mdwt)
Handysize	10,000-40,000	2,974	84.0
Handymax	40,000-60,000	2,705	140.9
Panamax	60,000-80,000	1,495	108.8
Post-Panamax	80,000-110,000	857	74.8
Capesize	110,000-200,000	1,165	197.5
Vloc	200,000+	319	81.7
Total		9,515	687.7

Source: Drewry Shipping Consultants.

Table 3: Global dry bulk orderbook, 2013-2016

Type of vessel	Size (dwt)	No. of vessels	Capacity (mdwt)	% of existing fleet
Handysize	10,000-40,000	389	12.430	14.6%
Handymax	40,000-60,000	383	20.336	14.4%
Panamax	60,000-80,000	293	20.737	19.0%
Post-Panamax	80,000-110,000	329	28.070	37.7%
Capesize	110,000-200,000	113	19.248	9.8%
Vloc	200,000+	108	26.043	32.1%
Total		1,615	126.863	18.4%

Source: Drewry Shipping Consultants.

2012 to 2015 represented 31.9 percent of the existing fleet. Other factors that contribute to the low ocean rates include weather disruptions in Australia, labor disputes in several countries, and an indefinite strike at the largest Colombian thermal coal exporter. The labor strike reduced Colombian coal exports by 53 percent in February. Heavy rainfall damaged some rail networks, reducing Australian coal exports by as much as 19 percent at four major ports in Queensland in January.

Market Outlook: As of April 26, the cost of shipping a metric ton of grain from the U.S. Gulf to Japan was \$46.50—14 percent less than a year ago. The cost of shipping from the Pacific Northwest was \$24.50—20 percent less than a year earlier. The rates may be lower for the foreseeable future due to many factors that play into market dynamics. Although orders for newly built vessels have slowed, scheduled deliveries until 2016 are still strong. In January, two major Japanese shipyards merged, creating the potential for economies of scale in providing a wide range of vessels. In addition, shipyards are lowering their prices to lure owners to place more orders.

Movements on the demand side of the market have been mixed which, along with the excess supply of ships, contributes to lower prices. Unfavorable weather forced Argentina to lower its wheat production estimate from 10.5 million tons to 10.1 million tons. As a result of a shrinking international profit margin, Indonesian thermal coal traders have turned to domestic markets. These scenarios may reduce the demand for Panamax and Supramax vessels in the regions, which will further depress the ocean freight rates. However, some market indicators are signaling a potential increase in bulk trade, which may force an uptick in ocean freight rates. In January, the India National Mineral Development Corporation announced a 6-percent reduction in the price of its lowest quality iron ore. The government also planned to promote exports of some minor bulk commodities, such as sugar, to prevent a further fall in commodity prices. Chinese steel mills are also restocking iron ore, and there are hopes of recovery in Colombian coal output during the second quarter. surajudeen.olowolayemo@ams.usda.gov

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
05/01/13	258	233	204	n/a	208	174
04/24/13	261	234	202	n/a	212	177

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	4/26/2013	4/19/2013
Corn	IL--Gulf	-0.64	-0.60
Corn	NE--Gulf	-0.54	-0.51
Soybean	IA--Gulf	-0.92	-1.04
HRW	KS--Gulf	-1.53	-1.58
HRS	ND--Portland	-1.84	-1.79

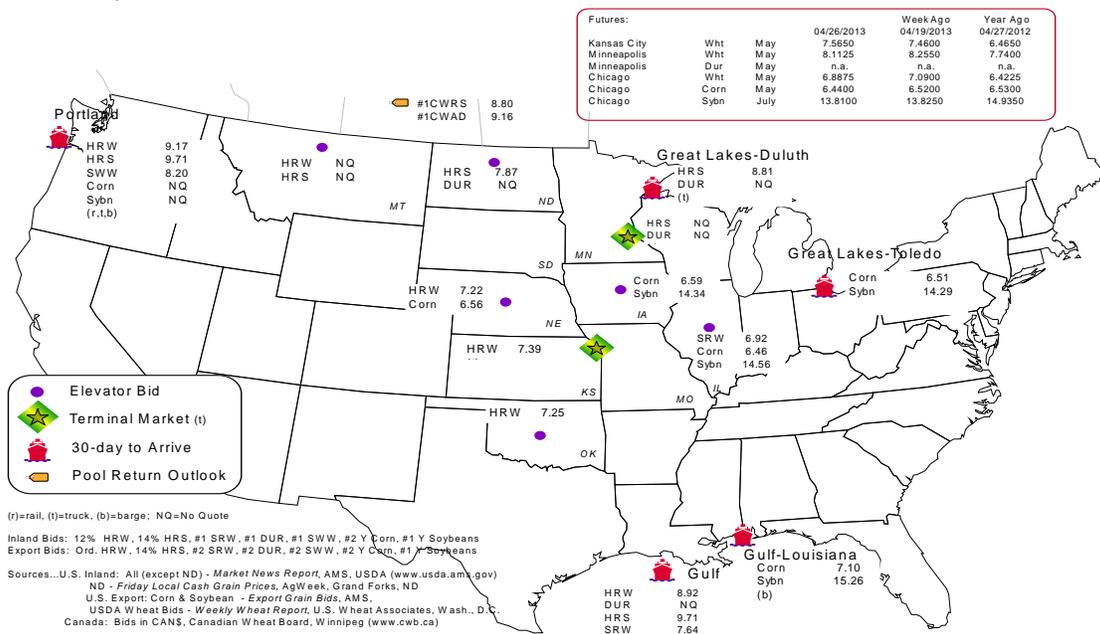
Note: nq = no quote

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 Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
04/24/2013 ^p	0	1,389	1,685	255	3,329	04/20/13	1,172
04/17/2013 ^r	1	1,683	1,359	29	3,072	04/13/13	1,254
2013 YTD ^r	7,890	17,510	61,247	8,387	95,034	2013 YTD	19,592
2012 YTD ^r	3,540	11,761	75,111	8,148	98,560	2012 YTD	37,069
2013 YTD as % of 2012 YTD	223	149	82	103	96	% change YTD	53
Last 4 weeks as % of 2012 ²	86	238	50	35	74	Last 4wks % 2012	50
Last 4 weeks as % of 4-year avg. ²	27	118	51	28	63	Last 4wks % 4 yr	60
Total 2012	22,604	40,780	199,419	33,046	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.

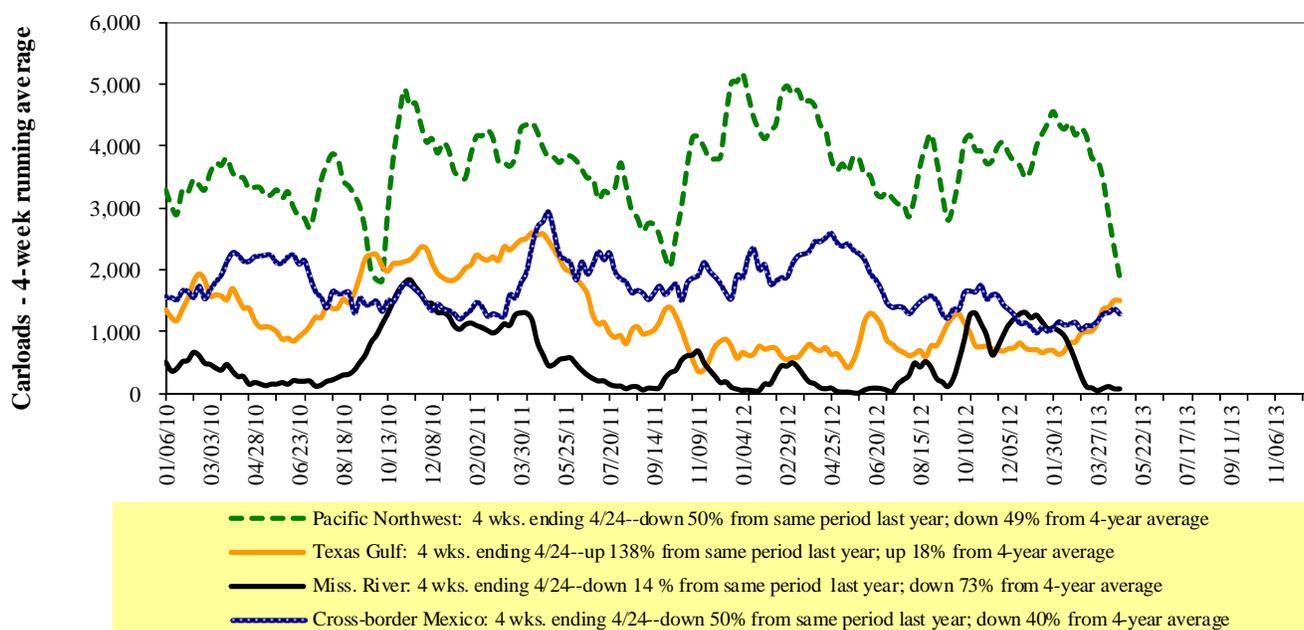
YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

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

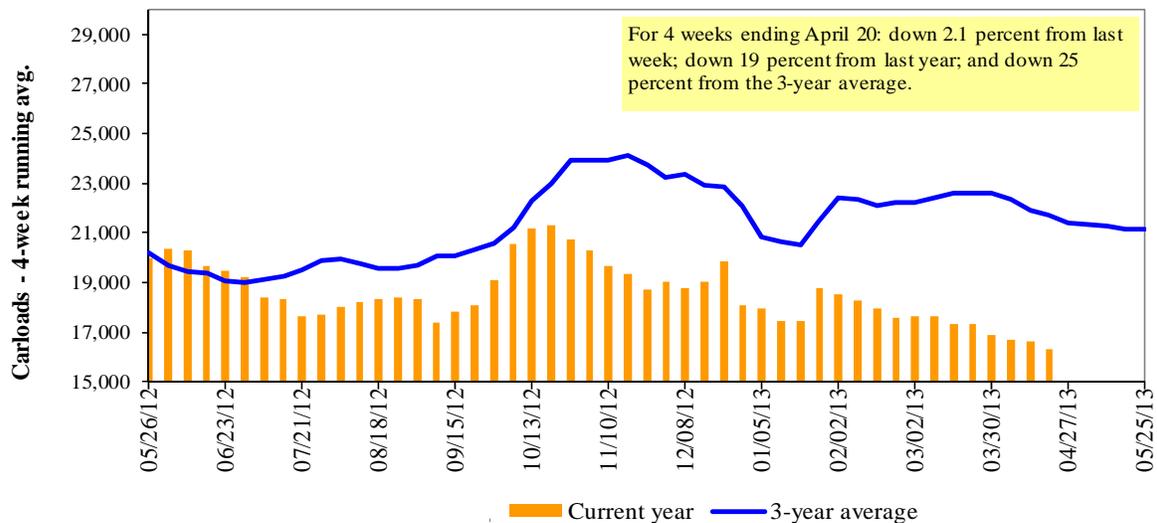
Table 4

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
04/20/13	1,841	2,140	7,313	623	3,753	15,670	3,879	5,766
This week last year	1,843	2,913	9,976	579	4,684	19,995	4,582	5,574
2013 YTD	24,690	39,899	145,765	7,735	61,526	279,615	54,733	86,427
2012 YTD	33,911	45,567	163,893	7,704	81,633	332,708	62,944	81,784
2013 YTD as % of 2012 YTD	73	88	89	100	75	84	87	106
Last 4 weeks as % of 2012	78	86	80	105	79	81	75	113
Last 4 weeks as % of 3-yr avg. ¹	73	79	77	75	72	76	78	111
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							
	May-13	May-12	Jun-13	Jun-12	Jul-13	Jul-12	Aug-13	Aug-12
BNSF ³								
COT grain units	0	2	no bids	0	no bids	0	no bids	0
COT grain single-car ⁵	0	0	no bids	0 . . 5	0	0 . . 5	0	0 . . 3
UP ⁴								
GCAS/Region 1	no bids	6	no bids	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	no bids	1	no bids	1	no bids	1	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.

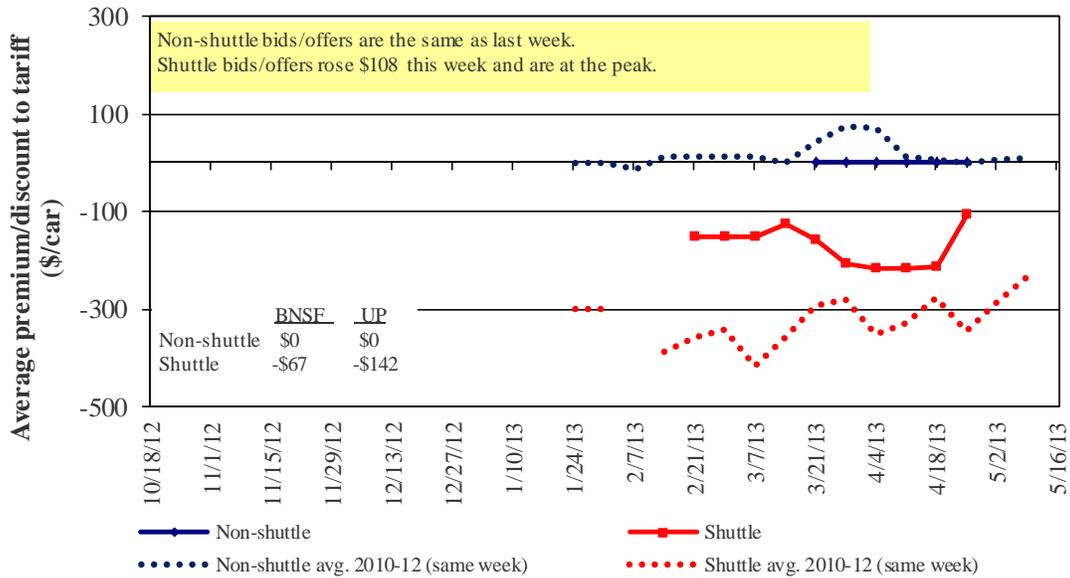
⁵Range is shown because average is not available. Not available = n/a.

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 May 2013, Secondary Market

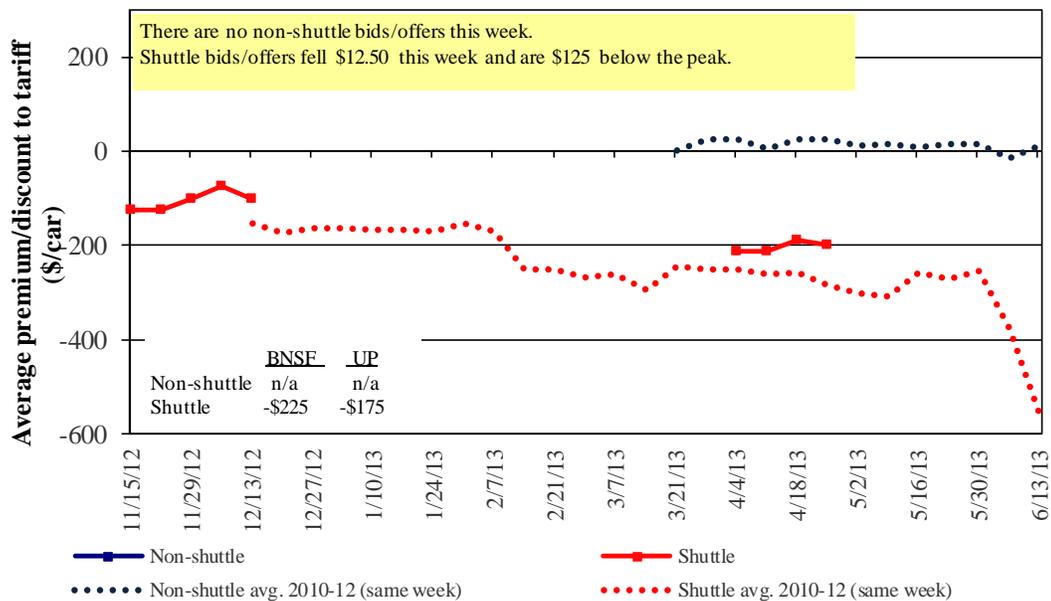


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

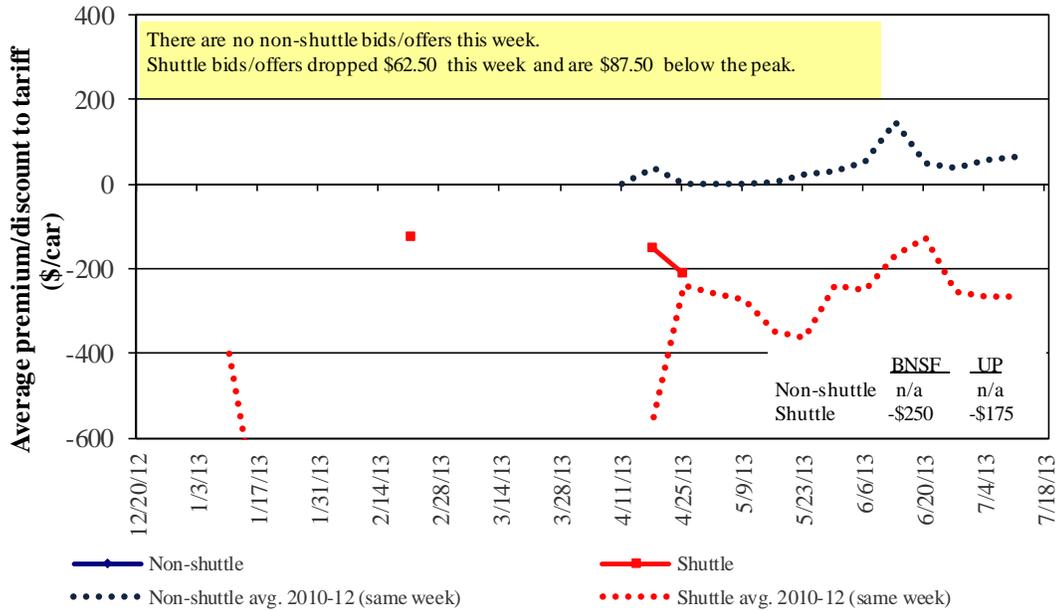


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in July 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						
	4/25/2013	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13
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 2012	10	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	-	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 2012	-	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle²							
BNSF-GF	(67)	(225)	(250)	n/a	n/a	n/a	n/a
Change from last week	158	-	n/a	n/a	n/a	n/a	n/a
Change from same week 2012	266	75	n/a	n/a	n/a	n/a	n/a
UP-Pool	(142)	(175)	(175)	(175)	150	n/a	n/a
Change from last week	58	(25)	(25)	(25)	300	n/a	n/a
Change from same week 2012	183	75	n/a	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 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
5/1/2013	Origin region*	Destination region*	Tariff rate/car	surcharge per car	metric ton	bushe ^l ²	change Y/Y ³
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,144	\$202	\$33.23	\$0.90	5
	Grand Forks, ND	Duluth-Superior, MN	\$3,543	\$119	\$36.37	\$0.99	8
	Wichita, KS	Los Angeles, CA	\$6,026	\$612	\$65.92	\$1.79	2
	Wichita, KS	New Orleans, LA	\$3,645	\$356	\$39.73	\$1.08	4
	Sioux Falls, SD	Galveston-Houston, TX	\$5,573	\$502	\$60.33	\$1.64	0
	Northwest KS	Galveston-Houston, TX	\$3,912	\$390	\$42.72	\$1.16	3
	Amarillo, TX	Los Angeles, CA	\$4,112	\$543	\$46.22	\$1.26	3
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,110	\$402	\$34.88	\$0.95	2
	Toledo, OH	Raleigh, NC	\$4,508	\$450	\$49.24	\$1.34	2
	Des Moines, IA	Davenport, IA	\$2,006	\$85	\$20.77	\$0.57	3
	Indianapolis, IN	Atlanta, GA	\$3,920	\$338	\$42.28	\$1.15	2
	Indianapolis, IN	Knoxville, TN	\$3,354	\$217	\$35.46	\$0.97	2
Soybeans	Des Moines, IA	Little Rock, AR	\$3,154	\$250	\$33.81	\$0.92	2
	Des Moines, IA	Los Angeles, CA	\$5,065	\$729	\$57.54	\$1.57	1
	Minneapolis, MN	New Orleans, LA	\$3,299	\$439	\$37.12	\$1.01	-1
	Toledo, OH	Huntsville, AL	\$3,575	\$320	\$38.68	\$1.05	2
	Indianapolis, IN	Raleigh, NC	\$4,578	\$453	\$49.96	\$1.36	2
	Indianapolis, IN	Huntsville, AL	\$3,267	\$217	\$34.60	\$0.94	2
Champaign-Urbana, IL	New Orleans, LA	\$3,599	\$402	\$39.74	\$1.08	5	
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,580	\$352	\$39.05	\$1.06	6
	Wichita, KS	Galveston-Houston, TX	\$3,634	\$274	\$38.81	\$1.06	11
	Chicago, IL	Albany, NY	\$3,771	\$422	\$41.64	\$1.13	3
	Grand Forks, ND	Portland, OR	\$5,061	\$608	\$56.30	\$1.53	4
	Grand Forks, ND	Galveston-Houston, TX	\$6,082	\$633	\$66.69	\$1.81	3
	Northwest KS	Portland, OR	\$4,880	\$640	\$54.81	\$1.49	3
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$740	\$55.02	\$1.50	0
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$678	\$54.00	\$1.47	0
	Champaign-Urbana, IL	New Orleans, LA	\$2,929	\$402	\$33.08	\$0.90	2
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$395	\$36.79	\$1.00	0
	Des Moines, IA	Amarillo, TX	\$3,510	\$315	\$37.98	\$1.03	2
	Minneapolis, MN	Tacoma, WA	\$4,800	\$734	\$54.96	\$1.50	0
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,200	\$760	\$49.25	\$1.34	0
	Sioux Falls, SD	Tacoma, WA	\$5,320	\$678	\$59.56	\$1.62	5
	Minneapolis, MN	Portland, OR	\$5,330	\$740	\$60.28	\$1.64	5
	Fargo, ND	Tacoma, WA	\$5,230	\$603	\$57.92	\$1.58	5
	Council Bluffs, IA	New Orleans, LA	\$3,500	\$464	\$39.36	\$1.07	-5
	Toledo, OH	Huntsville, AL	\$2,750	\$320	\$30.48	\$0.83	2
Grand Island, NE	Portland, OR	\$4,800	\$655	\$54.17	\$1.47	-6	

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: 5/1/2013

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel		Percent change Y/Y ⁴	
				surcharge per car ²	Tariff plus surcharge per: metric ton ³ bushel ³		
Wheat	MT	Chihuahua, CI	\$6,262	\$643	\$70.55	\$1.92	-18
	OK	Cuautitlan, EM	\$6,552	\$781	\$74.93	\$2.04	-4
	KS	Guadalajara, JA	\$7,444	\$755	\$83.77	\$2.28	0
	TX	Salinas Victoria, NL	\$3,553	\$294	\$39.31	\$1.07	-4
Corn	IA	Guadalajara, JA	\$7,699	\$888	\$87.73	\$2.23	0
	SD	Celaya, GJ ⁵	\$7,356	\$842	\$83.76	\$2.13	n/a
	NE	Queretaro, QA	\$7,153	\$788	\$81.15	\$2.06	1
	SD	Salinas Victoria, NL	\$5,700	\$640	\$64.78	\$1.64	1
	MO	Tlalnepantla, EM	\$6,592	\$766	\$75.18	\$1.91	1
	SD	Torreon, CU	\$6,522	\$705	\$73.84	\$1.87	0
Soybeans	MO	Bojay (Tula), HG	\$7,580	\$749	\$85.10	\$2.31	7
	NE	Guadalajara, JA	\$8,134	\$856	\$91.86	\$2.50	2
	IA	El Castillo, JA	\$8,555	\$836	\$95.96	\$2.61	3
	KS	Torreon, CU	\$6,651	\$531	\$73.39	\$2.00	3
Sorghum	TX	Guadalajara, JA	\$6,464	\$548	\$71.64	\$1.82	-3
	NE	Celaya, GJ ⁵	\$6,997	\$764	\$79.29	\$2.01	n/a
	KS	Queretaro, QA	\$6,815	\$480	\$74.53	\$1.89	5
	NE	Salinas Victoria, NL	\$5,438	\$562	\$61.30	\$1.56	5
	NE	Torreon, CU	\$6,153	\$627	\$69.28	\$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

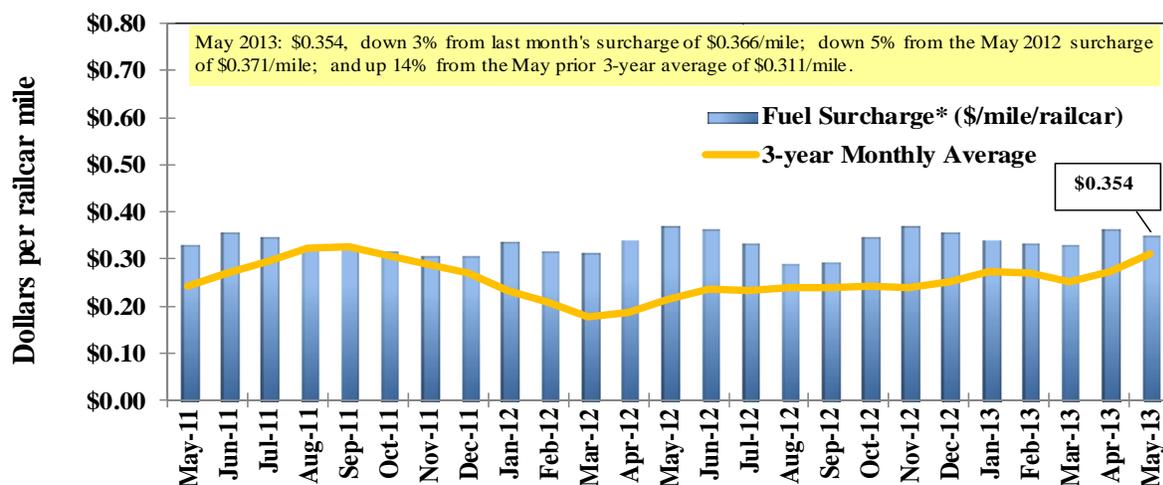
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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.

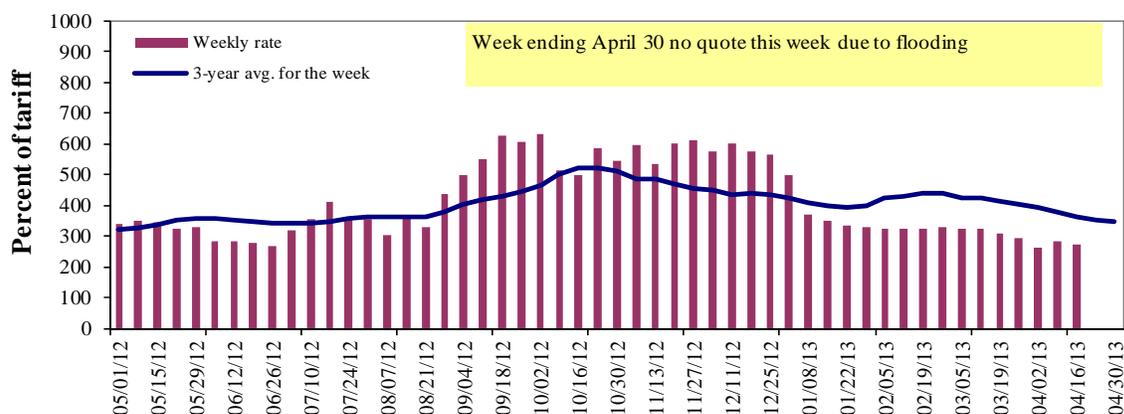
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.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

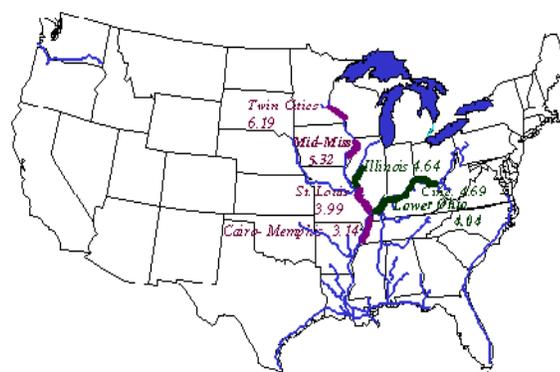
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	4/30/2013	425	313	-	220	193	193	180
	4/23/2013	-	-	-	223	195	195	180
\$/ton	4/30/2013	26.31	16.65	-	8.78	9.05	7.80	5.65
	4/23/2013	-	-	-	8.90	9.15	7.88	5.65
Current week % change from the same week:								
	Last year	0	-13	-	-9	-32	-32	-15
	3-year avg. ²	-	-	-	-13	-29	-29	1
Rate¹	May	388	300	268	220	193	193	180
	July	355	288	268	225	198	198	185

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; - no rates due to flooding

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates



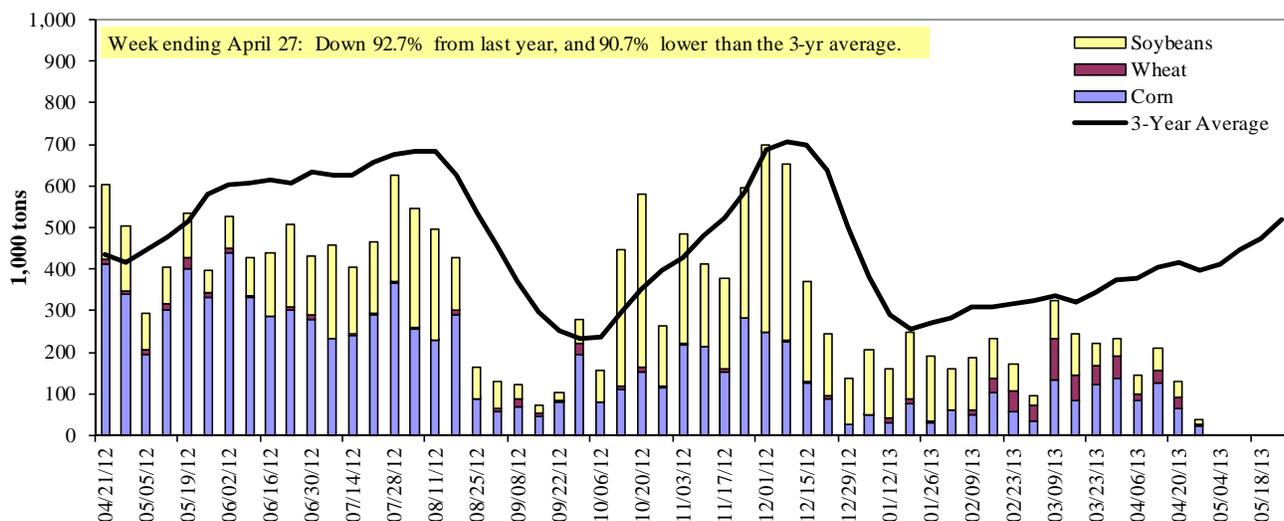
Calculating barge rate per ton:

(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 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 4/27/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	56	16	5	0	76
Winfield, MO (L25)	-	-	-	-	0
Alton, IL (L26)	22	3	12	0	38
Granite City, IL (L27)	22	3	12	0	38
Illinois River (L8)	10	0	5	0	14
Ohio River (L52)	19	10	17	0	47
Arkansas River (L1)	0	29	4	0	34
Weekly total - 2013	42	43	34	0	118
Weekly total - 2012	445	37	200	5	687
2013 YTD ¹	2,029	1,375	3,173	90	6,667
2012 YTD	6,046	597	3,858	115	10,615
2013 as % of 2012 YTD	34	230	82	78	63
Last 4 weeks as % of 2012 ²	32	39	34	57	41
Total 2012	14,837	1,794	12,663	229	29,523

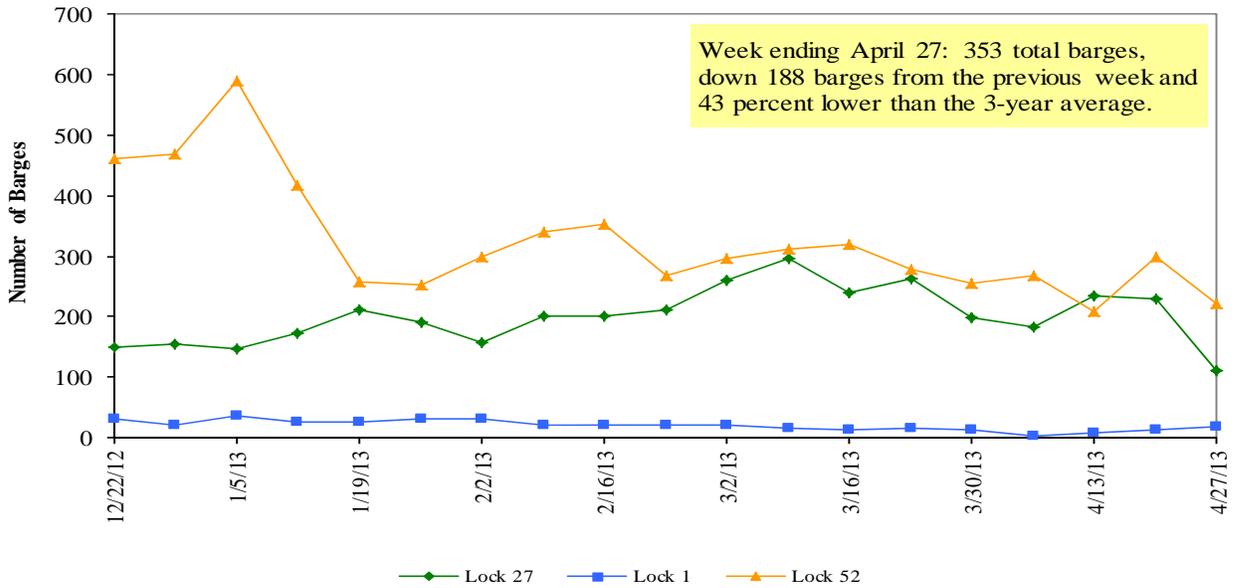
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2012. - no movements due to flooding

Note: Total may not add exactly, due to rounding

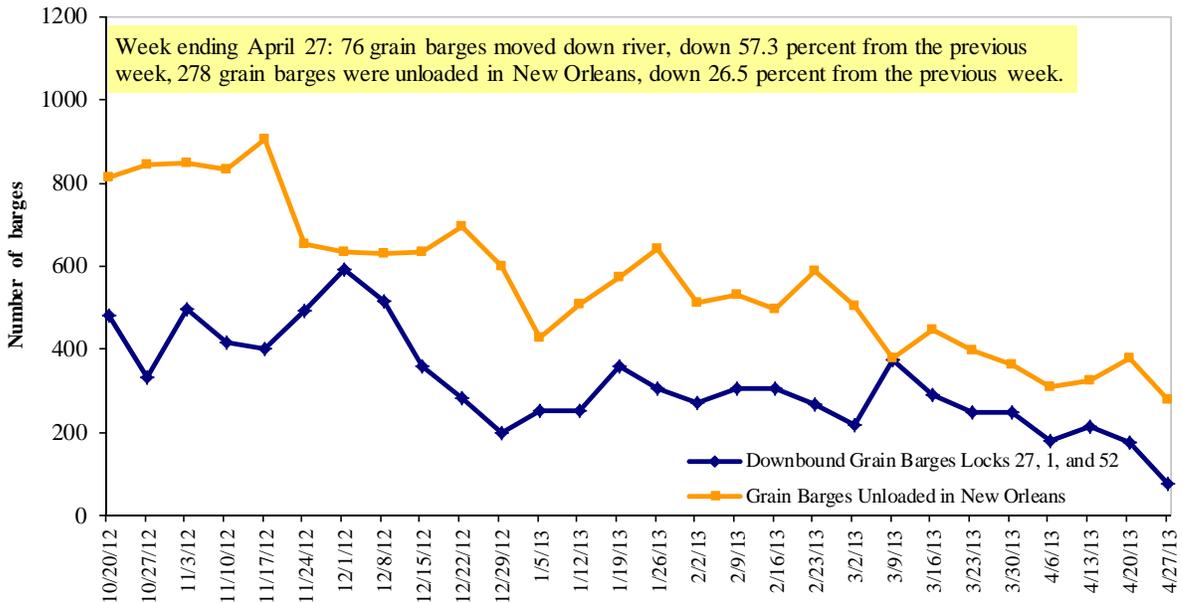
Source: U.S. Army Corps of Engineers

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 4/29/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.886	-0.038	-0.244
	New England	3.993	-0.034	-0.262
	Central Atlantic	3.934	-0.048	-0.286
	Lower Atlantic	3.831	-0.031	-0.208
II	Midwest ²	3.839	-0.029	-0.132
III	Gulf Coast ³	3.757	-0.045	-0.223
IV	Rocky Mountain	3.810	-0.036	-0.262
V	West Coast	3.949	-0.041	-0.381
	West Coast less California	3.833	-0.052	-0.419
	California	4.047	-0.032	-0.349
Total	U.S.	3.851	-0.036	-0.222

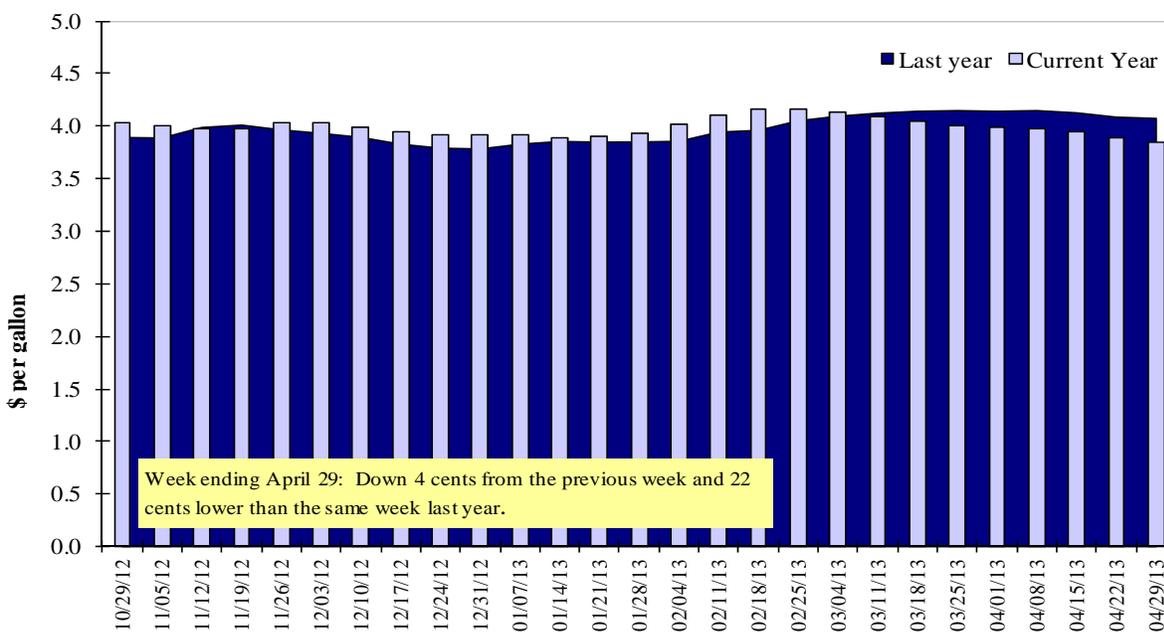
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
4/18/2013	1,711	884	771	409	100	3,874	4,303	2,556	10,733
This week year ago	1,187	899	1,044	834	29	3,993	9,496	4,742	18,231
Cumulative exports-marketing year²									
2012/13 YTD	8,340	4,331	5,155	4,162	447	22,435	12,118	33,874	68,427
2011/12 YTD	8,626	3,380	5,621	4,966	440	23,033	26,475	28,678	78,186
YTD 2012/13 as % of 2011/12	97	128	92	84	102	97	46	118	88
Last 4 wks as % of same period 2011/12	155	110	94	63	320	111	45	60	63
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 04/18/2013	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	5,732	10,006	(43)	12,367
Mexico	3,807	9,035	(58)	9,617
China	2,474	4,309	(43)	5,414
Korea	359	3,599	(90)	3,639
Venezuela	605	833	(27)	1,332
Top 5 Importers	12,977	27,782	(53)	32,369
Total US corn export sales	16,421	35,971	(54)	39,180
% of Projected	81%	92%		
Change from prior week	315	646		
Top 5 importers' share of U.S. corn export sales	79%	77%		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 04/18/2013	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	22,071	21,682	2	24,602
Mexico	2,253	2,580	(13)	3,180
Japan	1,570	1,551	1	1,891
Indonesia	1,286	1,316	(2)	1,741
Egypt	677	818	(17)	1,292
Top 5 importers	27,857	27,946	(0.3)	32,706
Total US soybean export sales	36,431	33,420	9	37,060
% of Projected	99%	90%		
Change from prior week	(206)	926		
Top 5 importers' share of U.S. soybean export sales	76%	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 04/18/2013	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	3,632	3,673	(1)	3,512
Mexico	2,720	3,466	(22)	3,496
Nigeria	2,903	3,166	(8)	3,248
Philippines	1,833	1,982	(7)	2,039
Korea	1,399	1,923	(27)	1,983
Egypt	1,550	934	66	950
Taiwan	1,034	958	8	888
Indonesia	435	761	(43)	830
Venezuela	633	649	(3)	594
Iraq	209	572	(63)	572
Top 10 importers	16,348	18,085	(10)	18,111
Total US wheat export sales	26,310	27,026	(3)	28,560
% of Projected	94%	95%		
Change from prior week	72	387		
Top 10 importers' share of U.S. wheat export sales	62%	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 04/25/13	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	307	334	92	4,350	4,551	96	96	107	12,625
Corn	0	0	n/a	1,194	2,283	52	12	10	5,512
Soybeans	66	0	n/a	3,617	3,934	92	41	53	10,347
Total	373	334	112	9,161	10,768	85	60	63	28,484
Mississippi Gulf									
Wheat	258	201	128	3,078	2,034	151	133	164	5,462
Corn	224	275	82	3,581	7,434	48	58	49	18,068
Soybeans	90	58	154	6,636	7,948	83	40	52	24,684
Total	572	534	107	13,295	17,416	76	66	68	48,215
Texas Gulf									
Wheat	217	144	151	2,234	1,617	138	196	106	5,912
Corn	29	0	n/a	72	256	28	35	23	336
Soybeans	0	0	n/a	122	0	n/a	n/a	0	626
Total	247	144	171	2,428	1,872	130	166	92	6,874
Interior									
Wheat	27	17	157	301	416	72	112	82	1,218
Corn	41	50	82	859	2,975	29	123	29	6,115
Soybeans	68	42	163	1,403	1,503	93	39	71	4,204
Total	136	109	125	2,563	4,894	52	52	46	11,538
Great Lakes									
Wheat	24	21	116	136	38	360	442	89	481
Corn	0	0	n/a	0	30	0	0	0	56
Soybeans	0	0	n/a	4	2	154	0	0	713
Total	24	21	116	139	70	199	283	83	1,250
Atlantic									
Wheat	8	0	n/a	306	2	n/a	n/a	27	341
Corn	0	0	n/a	2	62	3	0	0	143
Soybeans	19	9	217	657	432	152	124	126	1,460
Total	27	9	305	965	495	195	112	59	1,944
U.S. total from ports²									
Wheat	841	716	117	10,404	8,657	120	123	114	26,040
Corn	295	325	91	5,709	13,040	44	39	35	30,230
Soybeans	243	109	224	12,439	13,819	90	46	57	42,035
Total	1,379	1,150	120	28,552	35,516	80	68	66	98,305

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

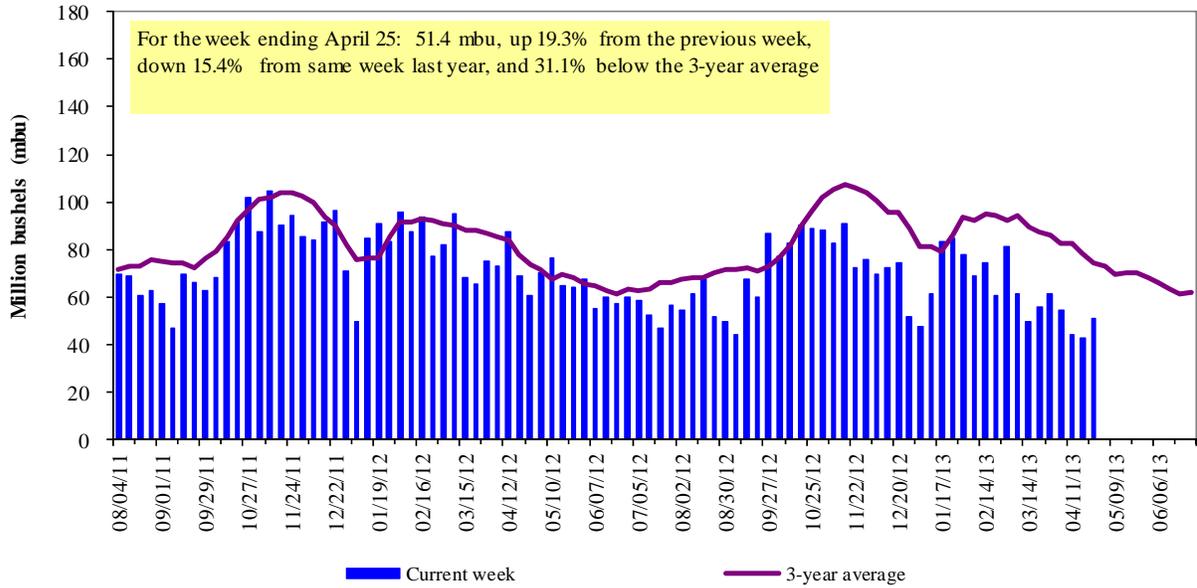
² Total includes only port regions shown above; Interior land-based shipments now included.

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)

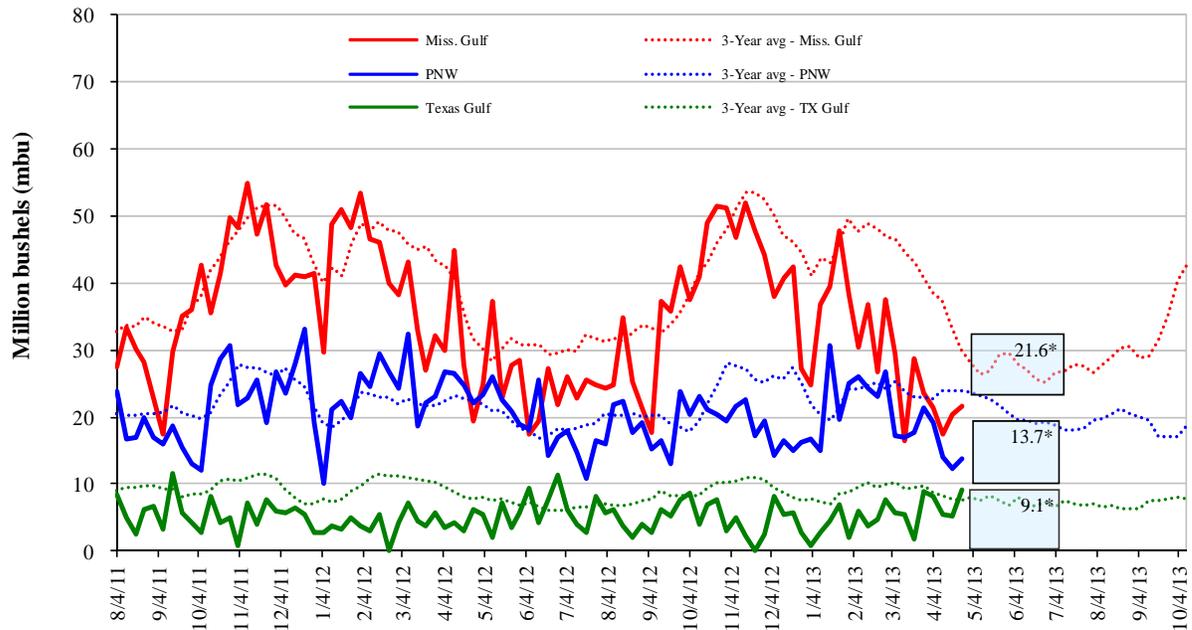


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

<u>April 25 % change from:</u>	<u>MSGulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Last week	up 6	up 73	up 20	up 12
Last year (same week)	up 11	up 50	up 20	down 38
3-yr avg. (4-wk mov. avg.)	down 28	up 20	down 19	down 41

Ocean Transportation

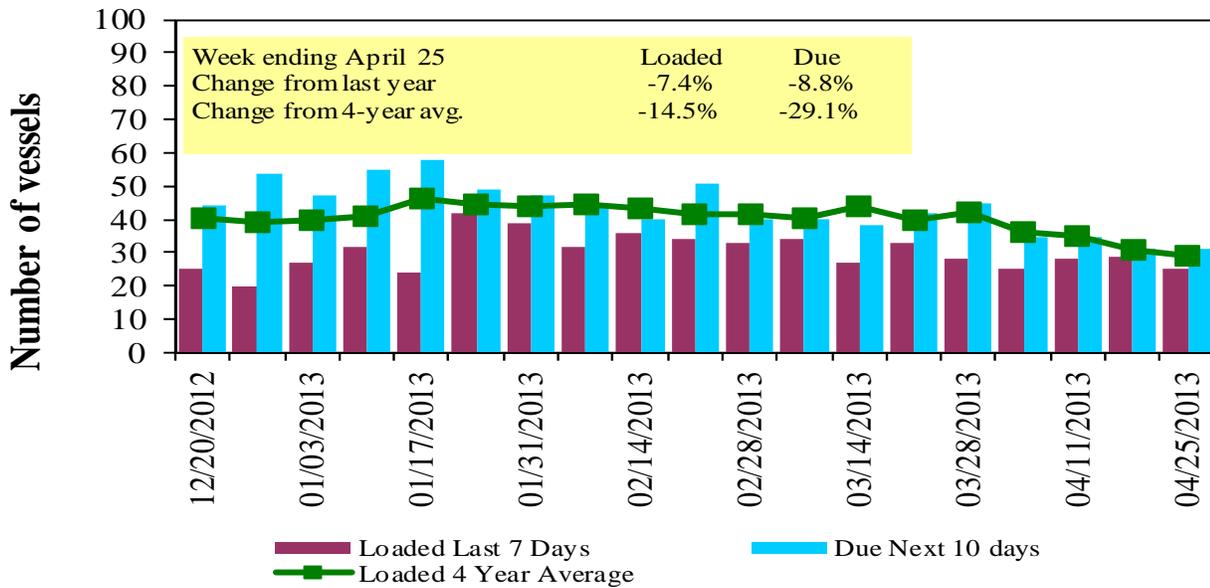
Table 17

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
4/25/2013	16	25	31	6	n/a
4/18/2013	19	29	31	6	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

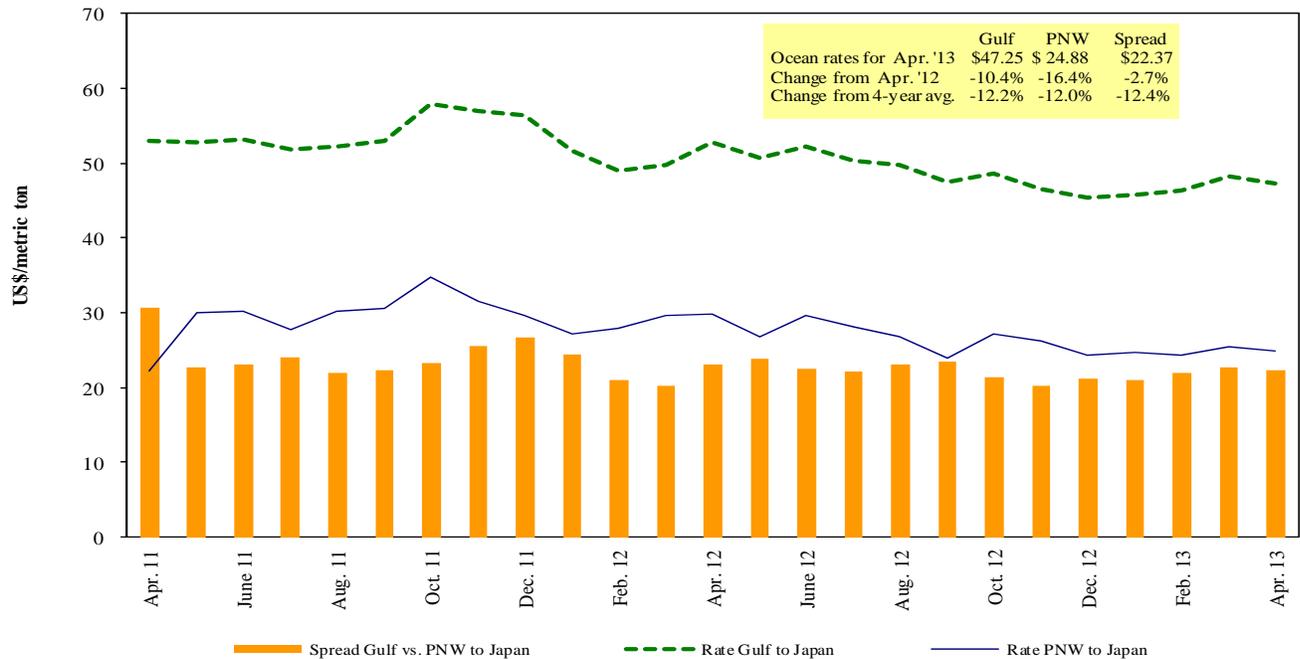
Figure 16
U.S. Gulf^d Vessel Loading Activity



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 04/27/2013

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/Feb 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	Jul 1/30	65,000	36.00
Brazil	China	Heavy Grain	May 20/29	65,000	36.00
Brazil	China	Heavy Grain	May 1/10	60,000	38.00
Brazil	China	Grain	May 1/10	55,000	40.00
Brazil	China	Heavy Grain	May 1/10	60,000	40.50
Brazil	China	Heavy Grain	Apr 10/15	60,000	43.00
Brazi	China	Heavy Grain	May 1/5	60,000	35.35
France	Algeria	Wheat	Apr 15/25	30,000	18.75
France	Algeria	Wheat	Mar 20/30	30,000	19.75
River Plate	Egypt	Heavy Grain	May 1/10	45,000	40.00
River Plate	Egypt Med	Heavy Grain	Apr 8/12	60,000	32.00

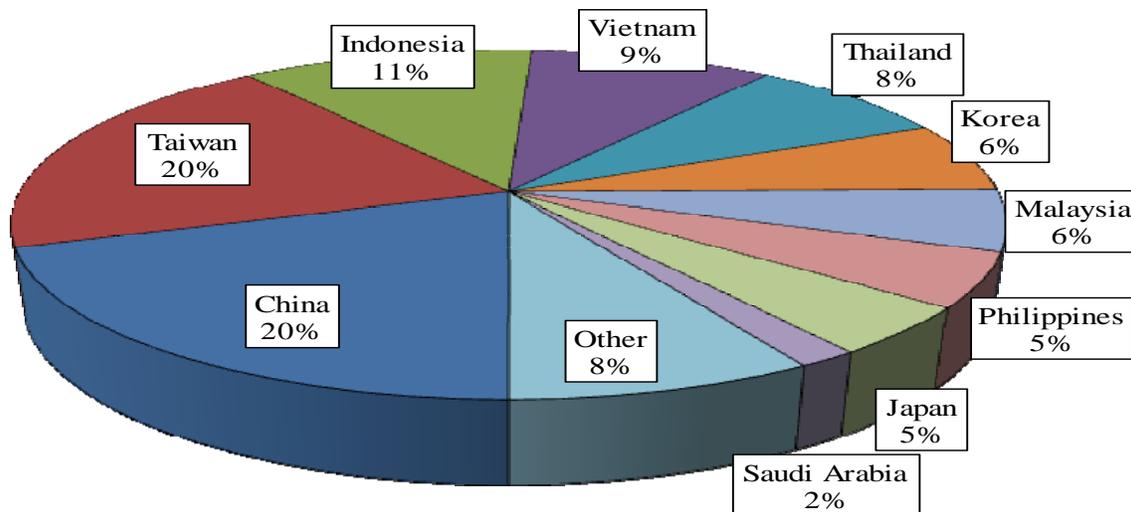
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

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.

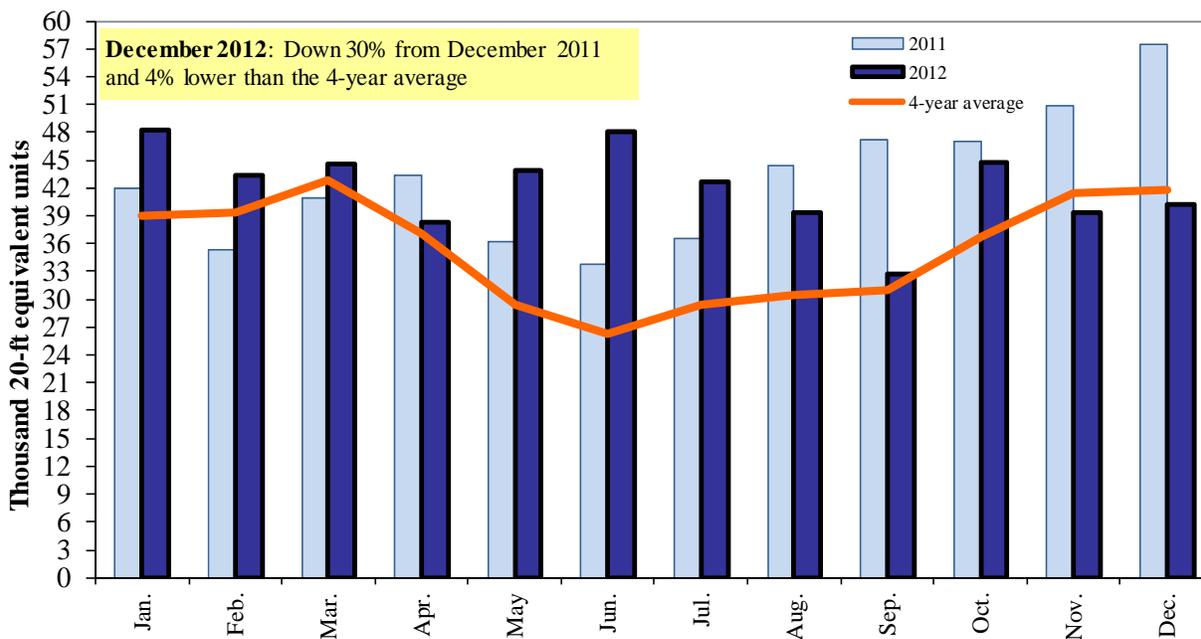
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, December 2012



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.

Contacts and Links

Coordinators

Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
Pierre Bahizi	pierre.bahizi@ams.usda.gov	(202) 690 - 0992
Adam Sparger	adam.sparger@ams.usda.gov	(202) 205 - 8701

Weekly Highlight Editors

Marina Denicoff	marina.denicoff@ams.usda.gov	(202) 690 - 3244
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
April Taylor	april.taylor@ams.usda.gov	(202) 295 - 7374
Nicholas Marathon	nick.marathon@ams.usda.gov	(202) 690 - 4430

Grain Transportation Indicators

Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
-------------------------------	----------------------------------------------------------------------------------------------	------------------

Rail Transportation

Marvin Prater	marvin.prater@ams.usda.gov	(202) 720 - 0299
Johnny Hill	johnny.hill@ams.usda.gov	(202) 690 - 3295
Adam Sparger	adam.sparger@ams.usda.gov	(202) 205 - 8701

Barge Transportation

Nicholas Marathon	nick.marathon@ams.usda.gov	(202) 690 - 4430
April Taylor	april.taylor@ams.usda.gov	(202) 295 - 7374

Truck Transportation

April Taylor	april.taylor@ams.usda.gov	(202) 295 - 7374
--------------	--------------------------------------------------------------------------	------------------

Grain Exports

Johnny Hill	johnny.hill@ams.usda.gov	(202) 690 - 3295
Marina Denicoff	marina.denicoff@ams.usda.gov	(202) 690 - 3244

Ocean Transportation

Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
April Taylor (Container movements)	april.taylor@ams.usda.gov	(202) 295 - 7374

Subscription Information: Send relevant information to GTRContactUs@ams.usda.gov for an electronic copy (*printed copies are also available upon request*).

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