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

Contact Us

June 13, 2013

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WEEKLY HIGHLIGHTS

Weekly Wheat Inspections Rebound

For the week ending June 6, total inspections of wheat rebounded to reach .664 million metric tons (mmt), 65 percent above last week and 9 percent above this time last year. Wheat inspections were also 21 percent above the 4-week running average, and increased in each of the major export regions. Week–to-week shipments of wheat increased to South America, Asia, and Nigeria. Texas Gulf grain inspections jumped 74 percent from the previous week and rail deliveries to the area remained strong (Table 3). Total inspections of corn and soybeans decreased 45 and 29 percent, respectively, from last week. Inspections of the major grains (corn, wheat, and soybeans) reached .909 mmt, 11 percent above last week but 39 percent below this time last year. Outstanding (unshipped) export sales continued to drop for corn, wheat, and soybeans.

Flood Conditions No Longer Stopping Mississippi River Barge Traffic

From late May to June 10, extreme flooding closed 10 locks on the Mississippi River. All Mississippi River locks are currently open. Between June 4 and June 6, a 5-mile stretch of the Mississippi River in the St. Louis area was closed to navigation. Today's St. Louis gage is 32 feet, slightly higher than the 30-foot flood stage and still requiring traffic restrictions until the river drops below 25 feet (forecast to occur on June 20). Barge customers have not seen significant rate increases in freight services as a result of the river closure.

Port of Stockton Opens Container-on-Barge Service

On June 9, the maiden voyage of the new container-on-barge service between the Ports of Stockton and Oakland, CA, set sail. This short-sea shipping opportunity is an alternative to moving containers by truck between processing plants and the port in northern California. The project, called the "M580 Marine Highway Project," uses the San Joaquin River to access the San Francisco Bay and the Port of Oakland. It reduces highway congestion, helping to improve air quality. The Project is funded through DOT/MARAD and the American Recovery & Reinvestment Act.

USDA Lowers Estimated Old Crop Corn Exports and Projected 2013/14 Corn Crop

On June 12, USDA lowered its estimate of the 2012/13 corn crop exports to 700 million bushels (mbu) based on slow export sales and shipments. This is down 50 mbu from the previous month's estimate and less than half of the 1.5 billion bushels of U.S. corn exported in 2011/12. USDA also lowered its projected 2013/14 corn crop to 14.0 billion bushels, stating that despite rapid planting progress across the Corn Belt in mid-May, rains and cool temperatures since have delayed the completion of planting in parts of the western Corn Belt and raised the likelihood of lower corn yields in that part of the country. USDA left 2013/14 projected corn exports unchanged from the previous month, recovering to 1.3 billion bushels from the drought-reduced exports of the 2012/13 marketing year.

Snapshots by Sector

Rail

U.S. railroads originated 15,473 **carloads of grain** during the week ending June 1, down 6 percent from last week, 21 percent from last year, and 26 percent from the 3-year average.

During the week ending June 6, average June non-shuttle **secondary railcar bids/offers per car** were at tariff, down $6.50 from last week and $5 lower than last year. Average shuttle bids/offers were $37.50 below tariff, down $12.50 from last week and $450 higher than last year.

Barge

During the week ending June 8, **barge grain movements** totaled 146,640 tons, 55.6 percent lower than the previous week and 74.2 percent lower than the same period last year.

During the week ending June 8, 96 grain barges **moved down river**, down 61.3 percent from last week; 313 grain barges were **unloaded in New Orleans**, up 17.2 percent from the previous week.

Ocean

During the week ending June 6, 24 **ocean-going grain vessels** were loaded in the Gulf, 14 percent less than the same period last year. Thirty-six vessels are expected to be loaded within the next 10 days, 13 percent more than the the same period last year.

During the week ending June 7, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $44 per mt, unchanged from the previous week. The cost of shipping from the Pacific Northwest to Japan was $22.50 per mt, unchanged from the previous week.

Fuel

During the week ending June 10, U.S. average **diesel fuel prices,** at $3.85 per gallon, were down 2 cents from the previous week—7 cents higher than the same week last year.

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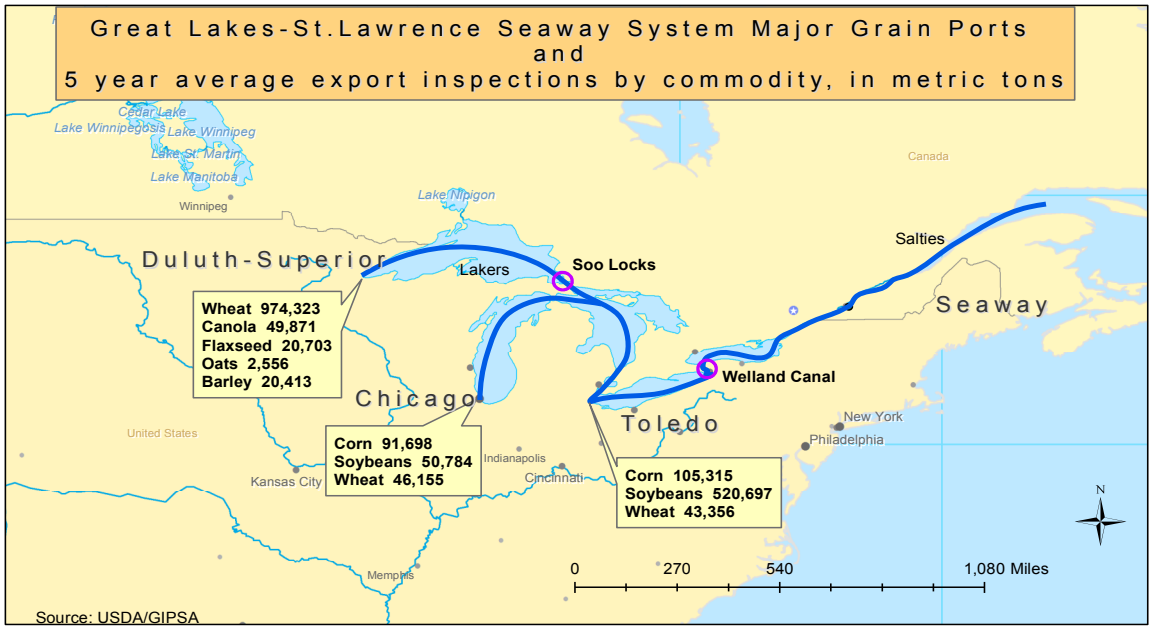
Feature Article/Calendar

Grain Shipments and Logistics through the Great Lakes–St. Lawrence Seaway System

The Great Lakes—St. Lawrence Seaway System is composed of the five Great Lakes, their connecting channels, and the St. Lawrence River leading into the Atlantic Ocean. In 2012, Agricultural products represent about 40 percent of all St. Lawrence traffic.[1] The United States and Canada ship grain, including wheat, corn, soybeans, barley, oats, and flaxseed, through the St. Lawrence Seaway for export primarily to Europe and North Africa. This article examines trends and issues in grain shipping through the St. Lawrence Seaway and U.S. grain exports inspected in this region by the Grain Inspection, Packers & Stockyards Administration (GIPSA).

Great Lakes Logistics

Three types of vessels operate in the Great Lakes: local bulk carriers known as "lakers", ocean-going vessels called "salties", and barges. The Seaway System is a shared arrangement between the United States and Canada where lakers move cargo between Great Lakes ports, with both countries reserving domestic commerce to their own flag carriers. Salties from the United States and other nations connect the Lakes with the rest of the world. The St. Lawrence Seaway provides ocean-going vessels and smaller lakers with access to the Lakes and ocean, respectively.



Very large salties are unable to travel inland of the St. Lawrence Seaway due to their beam (width at the widest point). However, because the smallest of the Soo Locks is larger than the largest Seaway lock, salties that are able pass through the Seaway may then travel anywhere in the Great Lakes.

The largest lakers are confined to the Upper Lakes (Superior, Michigan, Huron, Erie) because they are too large to use the Seaway locks that begin at the Welland Canal and bypass the Niagara River (see map). Lock sizes limit the sizes of vessels that can traverse the seaway. The maximum allowed vessel size is 740 feet long, 78 feet wide, and 26.5 feet deep; vessels designed for use on the Great Lakes following the opening of the Seaway were often built to the maximum size permissible by the locks and are informally known as Seawaymax. They are built on the Lakes and cannot travel downstream beyond the Welland Canal. In

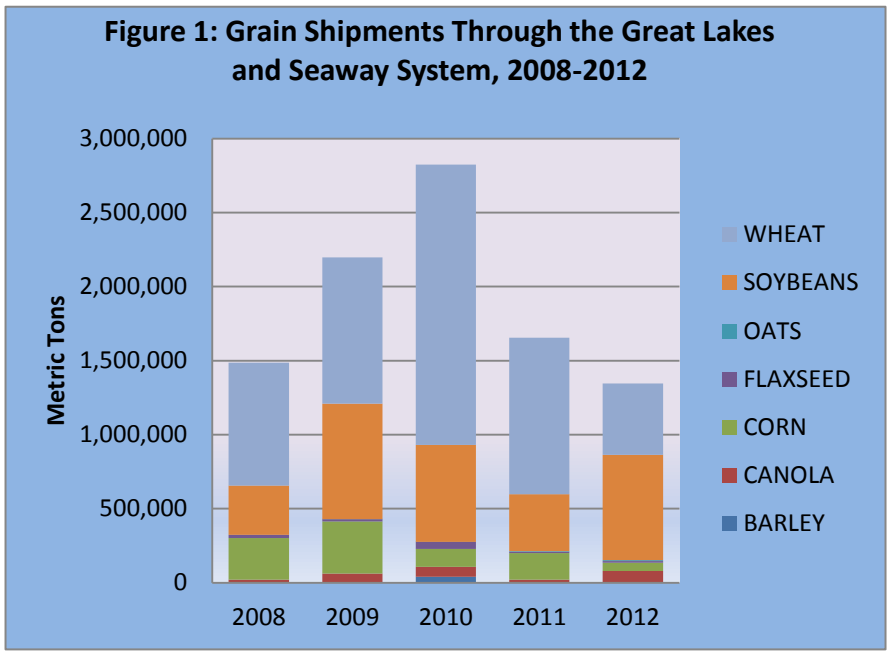
[1] http://www.greatlakes-seaway.com/en/seaway/facts/commodities/index.html

comparison, Panamax ships have a beam of 106 ft. Channel depths and limited lock sizes allow only 10% of ocean-going ships to traverse the entire Seaway. The Soo Locks and Welland Canal are closed from mid-January to late March by winter ice, effectively limiting the navigation season.

U.S. Grain Shipments through the Seaway

Grain exports through the Great Lakes and Seaway peaked in 2010 at 2.82 mmt, when U.S. wheat exports surged in response to a drought-induced grain export ban in Russia, and fell to a low of 1.3 mmt in 2012 (see fig. 1) because of decreased wheat exports and increased soybean shipments to Asia from other U.S. ports. Despite decreases in total grain inspected in 2012 from the previous year, soybean inspections increased as shipments to France, Germany, Japan, the Netherlands increased from the previous year.

In 2012, total grain inspections from the System accounted for 2 percent of all grain inspected in the United States. Depending on demand for wheat and soybeans in Africa and Europe, one or the other can dominate the type of grain moving out of the United States through the Seaway. In 2012, soybeans overtook wheat as the main St. Lawrence Seaway grain export. All St. Lawrence Seaway System ports showed large decreases in grain inspections compared to 2011, with the exception of the Port of Toledo, which had a 40-percent increase. The Port of Chicago inspections decreased by 59 percent from 2011 to 2012, and the Port of Duluth decreased by 47 percent. In addition to Canada, major destinations for U.S. grain shipments through the Seaway in 2012 included the Netherlands, Italy, Germany, and Spain because the Seaway is closer to Europe than is the Gulf.



Issues Affecting Grain Transport by Seaway

The Great Lakes St. Lawrence Seaway System competes with other ports (the Gulf) on price (shipping rates), transit time, and frequency of service. Seasonality affects transport in the System as closing the Great Lakes System for 3 months in the winter forces shippers and carriers to look for alternatives. Changing demand patterns also affect grain movement through the Great Lakes. For example, shorter and less expensive routes such as the PNW and U.S. Gulf have experienced increased use as Asian nations, particularly China, import more U.S. grain. Capacity constraints are another issue; lock sizes limit the sizes of the vessels that can navigate the Seaway. In spite of these issues, the Great Lakes remain an important outlet for U.S. grain destined for Europe and North Africa. *pierre.bahizi@ams.usda.gov*

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
Week ending		Unit Train	Shuttle		Gulf	Pacific
06/12/13	258	236	209	163	197	160
06/05/13	260	236	210	175	197	160

[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

Table 2

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

Commodity	Origin--Destination	6/7/2013	5/31/2013
Corn	IL--Gulf	-0.59	-0.72
Corn	NE--Gulf	-0.42	-0.62
Soybean	IA--Gulf	-0.81	-0.98
HRW	KS--Gulf	-1.57	-1.55
HRS	ND--Portland	-1.72	-1.72

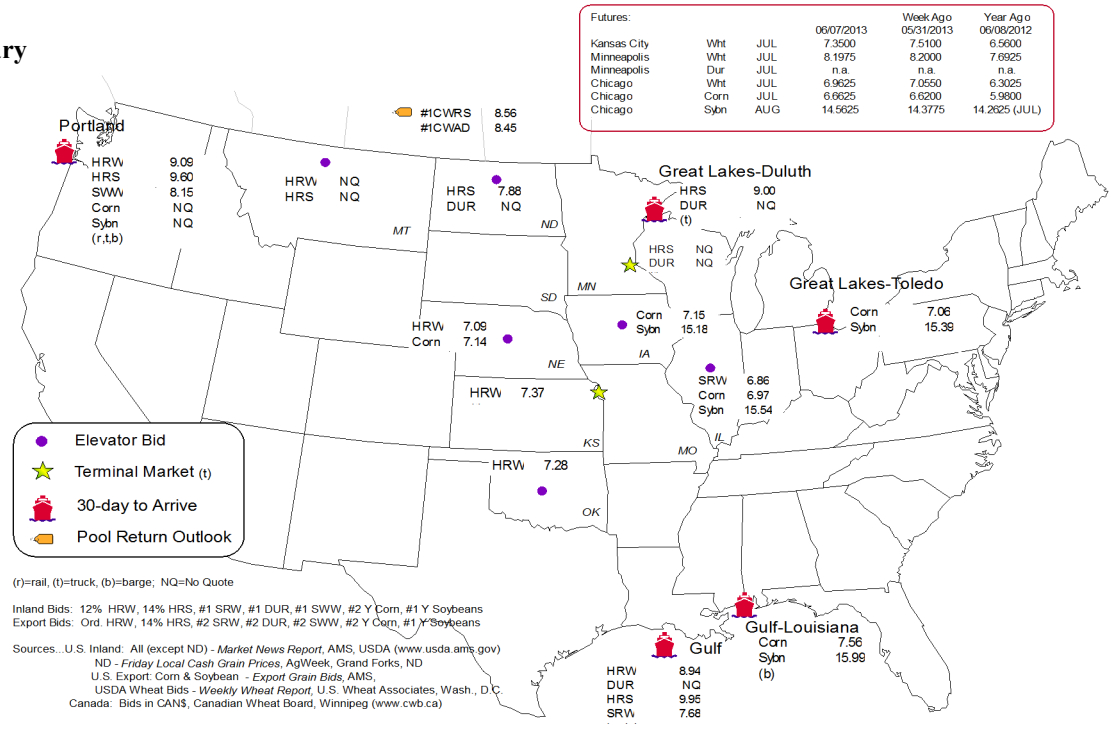
Note: nq = no quote

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]
06/05/2013[p]	104	2,096	981	88	3,269	06/01/13	1,407
05/29/2013[r]	403	1,900	814	19	3,136	05/25/13	1,155
2013 YTD[r]	8,888	27,284	67,252	9,153	112,577	2013 YTD	27,049
2012 YTD[r]	3,819	17,154	97,100	9,787	127,860	2012 YTD	50,504
2013 YTD as % of 2012 YTD	233	159	69	94	88	% change YTD	54
Last 4 weeks as % of 2012[2]	359	138	24	47	56	Last 4wks % 2012	56
Last 4 weeks as % of 4-year avg.[2]	87	140	27	47	58	Last 4wks % 4 yr	62
Total 2012	22,604	40,780	199,419	33,812	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 aproximately 15 percent below the Association of American Railroads reported weekly carloads received by Mexican railroads to reflect switching between KCSM and FerroMex.

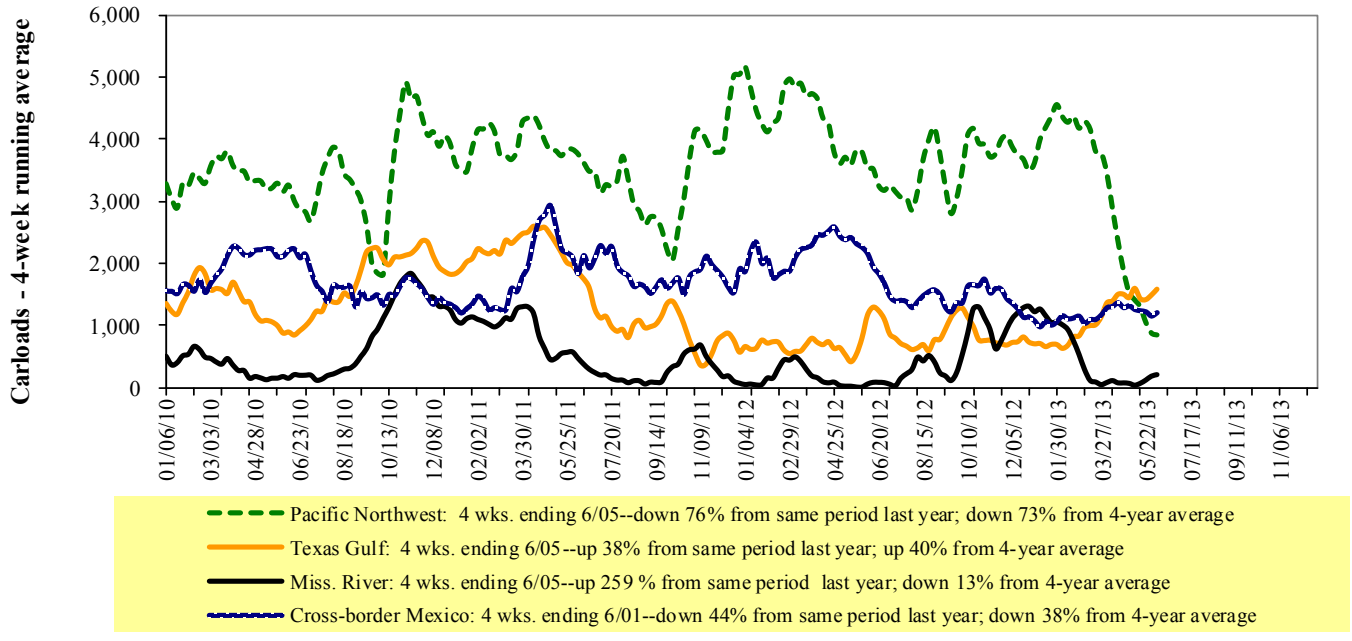
YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

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)

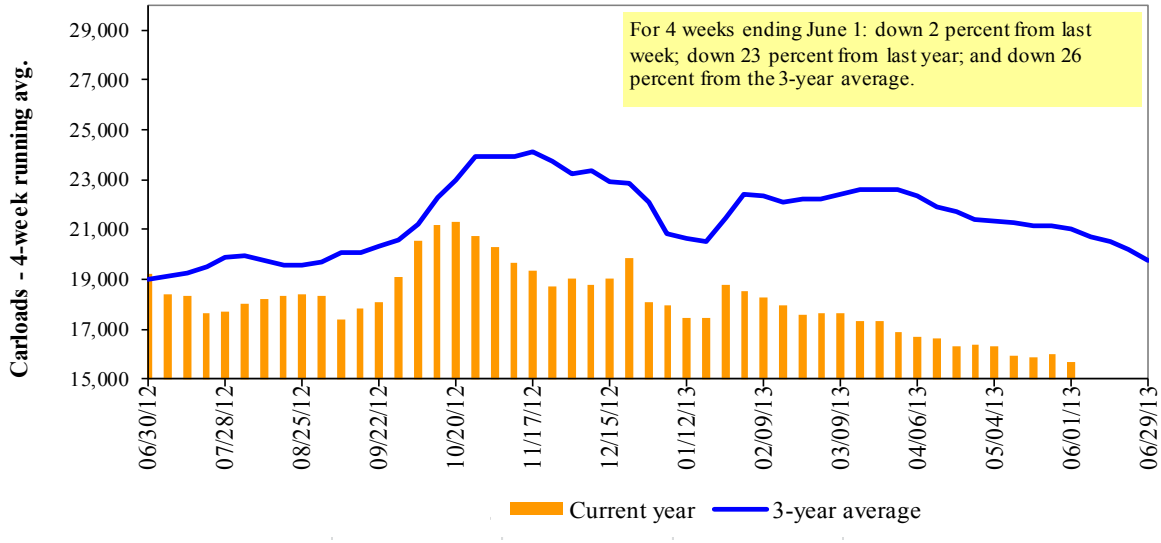
Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
06/01/13	1,836	2,441	7,137	577	3,482	15,473	2,038	3,661
This week last year	1,683	2,696	8,823	548	5,768	19,518	3,382	3,138
2013 YTD	33,262	55,452	190,518	10,590	85,008	374,830	73,322	115,062
2012 YTD	43,569	62,239	221,336	10,874	113,727	451,745	85,104	104,525
2013 YTD as % of 2012 YTD	76	89	86	97	75	83	86	110
Last 4 weeks as % of 2012	89	98	74	80	68	77	80	132
Last 4 weeks as % of 3-yr avg.[1]	79	89	75	65	70	76	76	99
Total 2012	85,384	145,336	515,638	26,936	244,077	1,017,371	204,068	266,266

[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							
6/6/2013	Jun-13	Jun-12	Jul-13	Jul-12	Aug-13	Aug-12	Sep-13	Sep-12
BNSF[3]								
COT grain units	3	0	no bids	0	no bids	1	1	5
COT grain single-car[5]	0 . . 1	0	0 . . 1	0 . . 5	0	2 . . 16	1	no offer
UP[4]								
GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	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.

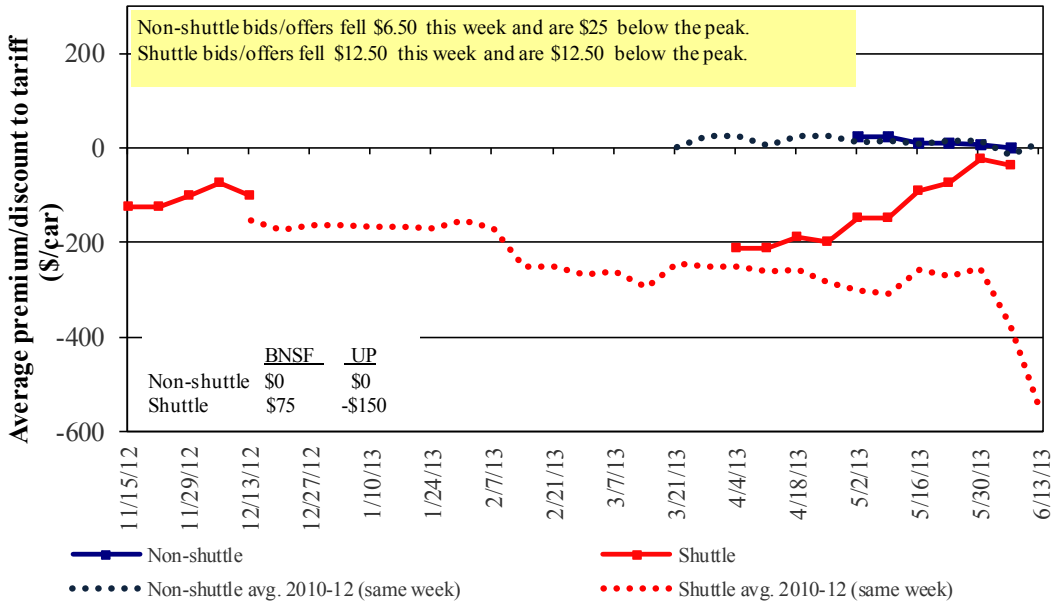
[5]Range is shown because average is not available. Not available = n/a.

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 June 2013, Secondary Market

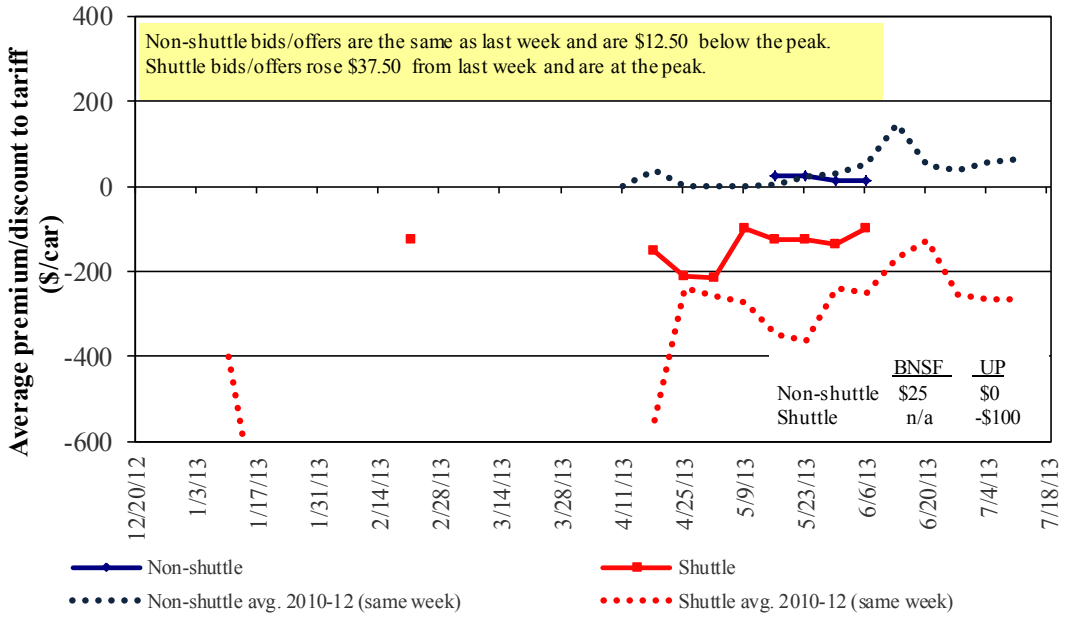


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

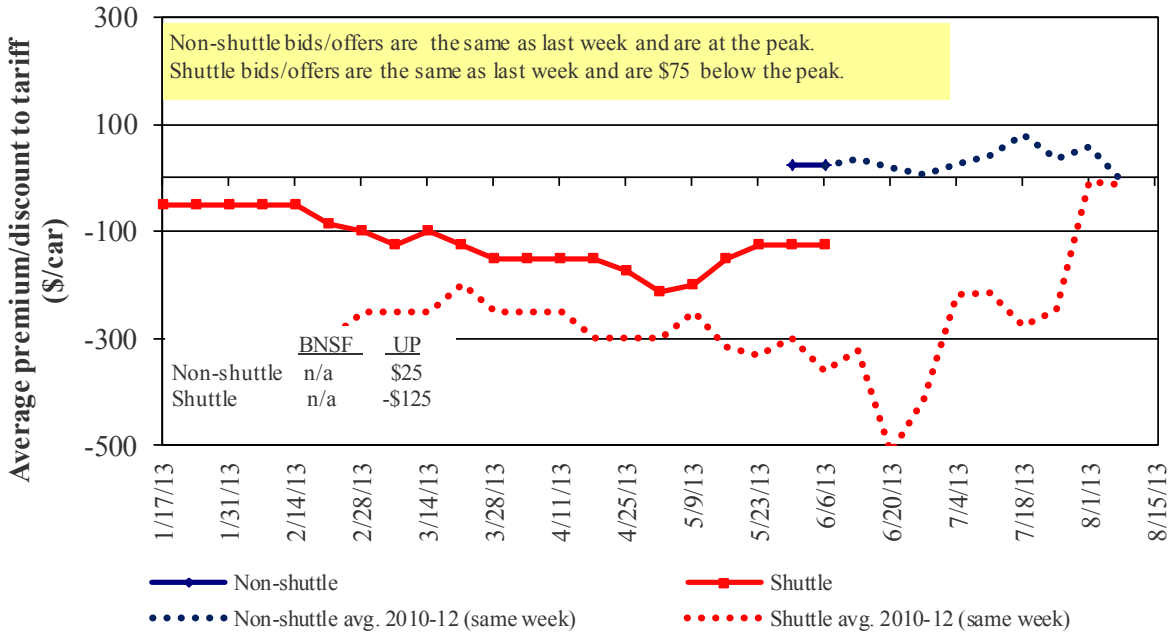


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in August 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					
6/6/2013	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13
Non-shuttle						
BNSF-GF	-	25	n/a	n/a	n/a	n/a
Change from last week	(13)	-	n/a	n/a	n/a	n/a
Change from same week 2012	(10)	25	n/a	n/a	n/a	n/a
UP-Pool	-	-	25	n/a	n/a	n/a
Change from last week	-	-	-	n/a	n/a	n/a
Change from same week 2012	-	(30)	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	75	n/a	n/a	n/a	n/a	n/a
Change from last week	25	n/a	n/a	n/a	n/a	n/a
Change from same week 2012	450	n/a	n/a	n/a	n/a	n/a
UP-Pool	(150)	(100)	(125)	(125)	n/a	n/a
Change from last week	(50)	25	-	-	n/a	n/a
Change from same week 2012	450	292	300	125	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: 6/1/2013	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	$202	$33.70	$0.92	6
	Grand Forks, ND	Duluth-Superior, MN	$3,543	$119	$36.37	$0.99	8
	Wichita, KS	Los Angeles, CA	$6,244	$612	$68.08	$1.85	3
	Wichita, KS	New Orleans, LA	$3,808	$356	$41.35	$1.13	4
	Sioux Falls, SD	Galveston-Houston, TX	$5,824	$502	$62.82	$1.71	4
	Northwest KS	Galveston-Houston, TX	$4,076	$390	$44.35	$1.21	4
	Amarillo, TX	Los Angeles, CA	$4,275	$543	$47.84	$1.30	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
	Des Moines, IA	Little Rock, AR	$3,146	$250	$33.73	$0.92	2
	Des Moines, IA	Los Angeles, CA	$5,065	$729	$57.54	$1.57	1
Soybeans	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	$3,798	$274	$40.44	$1.10	4
	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	$5,043	$640	$56.43	$1.54	4
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
	Council Bluffs, IA	Stockton, CA	$4,200	$760	$49.25	$1.34	0
Soybeans	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	$3,950	$464	$43.83	$1.19	5
	Toledo, OH	Huntsville, AL	$2,750	$320	$30.48	$0.83	2
	Grand Island, NE	Portland, OR	$4,960	$655	$55.76	$1.52	-3

[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: 6/1/2013							
				Fuel	Tariff plus surcharge per:		Percent
Commodity	Origin state	Destination region	Tariff rate/car[1]	surcharge per car[2]	metric ton[3]	bushel[3]	change Y/Y[4]
Wheat	MT	Chihuahua, CI	$6,262	$579	$69.90	$1.90	-19
	OK	Cuautitlan, EM	$6,715	$703	$75.80	$2.06	-3
	KS	Guadalajara, JA	$8,293	$679	$91.68	$2.49	9
	TX	Salinas Victoria, NL	$2,872	$265	$32.05	$0.87	-22
Corn	IA	Guadalajara, JA	$7,699	$799	$86.82	$2.20	-1
	SD	Celaya, GJ[5]	$7,356	$757	$82.90	$2.10	n/a
	NE	Queretaro, QA	$7,153	$710	$80.34	$2.04	0
	SD	Salinas Victoria, NL	$5,700	$576	$64.12	$1.63	0
	MO	Tlalnepantla, EM	$6,592	$689	$74.40	$1.89	0
	SD	Torreon, CU	$6,522	$634	$73.12	$1.86	-1
Soybeans	MO	Bojay (Tula), HG	$7,580	$674	$84.34	$2.29	2
	NE	Guadalajara, JA	$8,134	$771	$90.99	$2.47	1
	IA	El Castillo, JA	$8,555	$753	$95.10	$2.59	2
	KS	Torreon, CU	$6,651	$478	$72.84	$1.98	2
Sorghum	TX	Guadalajara, JA	$6,464	$493	$71.08	$1.80	-4
	NE	Celaya, GJ[5]	$6,997	$688	$78.51	$1.99	n/a
	KS	Queretaro, QA	$6,815	$432	$74.04	$1.88	5
	NE	Salinas Victoria, NL	$5,438	$506	$60.73	$1.54	4
	NE	Torreon, CU	$6,153	$564	$68.64	$1.74	0

[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

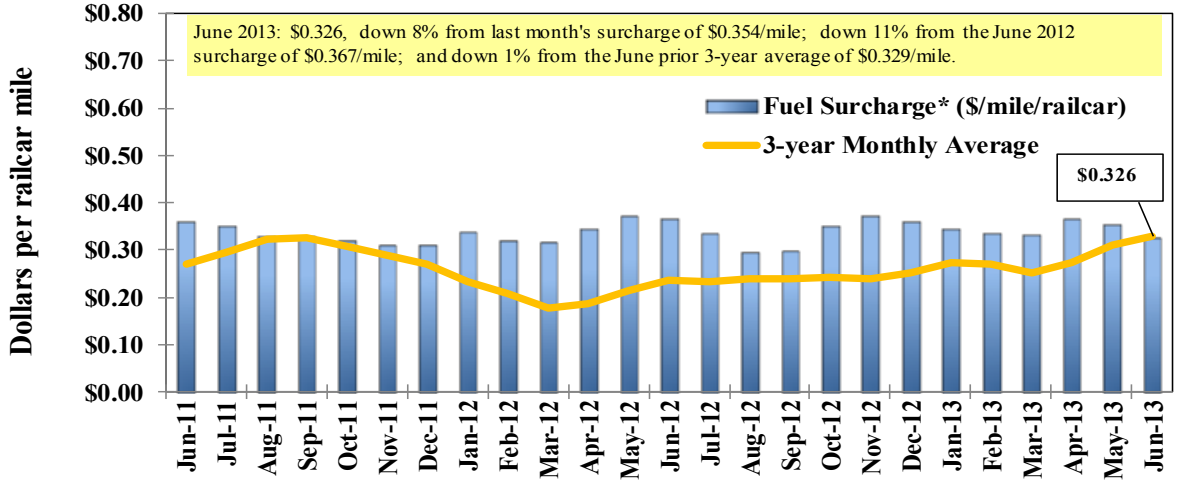
[4]Percentage change year over year calculated using tariff rate plus fuel surchage

[5] Beginning 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 Average[1]



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

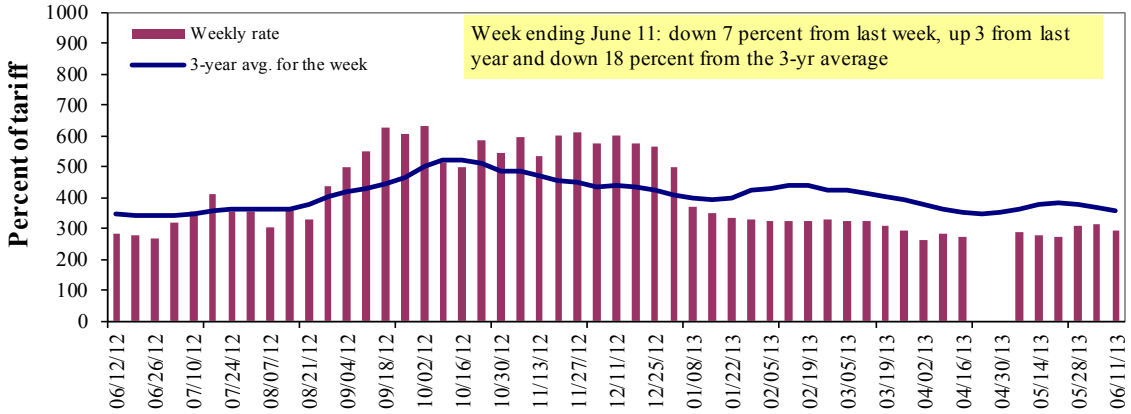
* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

** 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]	6/11/2013	355	305	293	218	190	190	188
	6/4/2013	397	317	315	222	193	193	182
$/ton	6/11/2013	21.97	16.23	13.60	8.70	8.91	7.68	5.90
	6/4/2013	24.57	16.86	14.62	8.86	9.05	7.80	5.71
Current week % change from the same week:								
	Last year	-8	-5	3	0	-29	-29	-6
	3-year avg. [2]	-18	-17	-18	-17	-41	-41	-21
Rate[1]	July	350	295	280	233	200	200	193
	September	493	448	438	375	438	438	350

[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

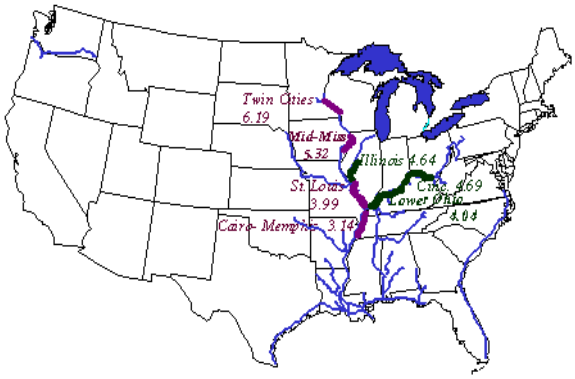
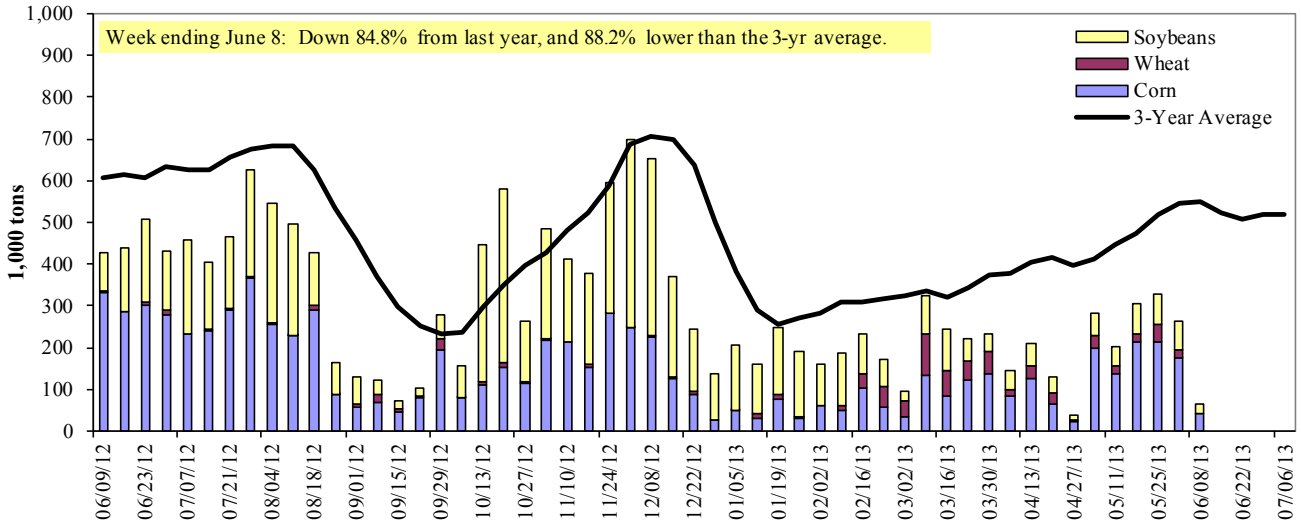


Figure 10

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 6/08/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	98	11	33	0	141
Winfield, MO (L25)	0	0	0	0	0
Alton, IL (L26)	11	0	6	5	22
Granite City, IL (L27)	41	0	24	5	70
Illinois River (L8)	75	10	16	0	100
Ohio River (L52)	19	10	29	0	57
Arkansas River (L1)	0	17	3	0	20
Weekly total - 2013	60	27	55	5	147
Weekly total - 2012	376	57	135	1	569
2013 YTD[1]	3,289	1,667	3,658	117	8,730
2012 YTD	8,420	874	4,633	135	14,062
2013 as % of 2012 YTD	39	191	79	86	62
Last 4 weeks as % of 2012[2]	46	37	69	124	55
Total 2012	14,837	1,794	12,663	229	29,523

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

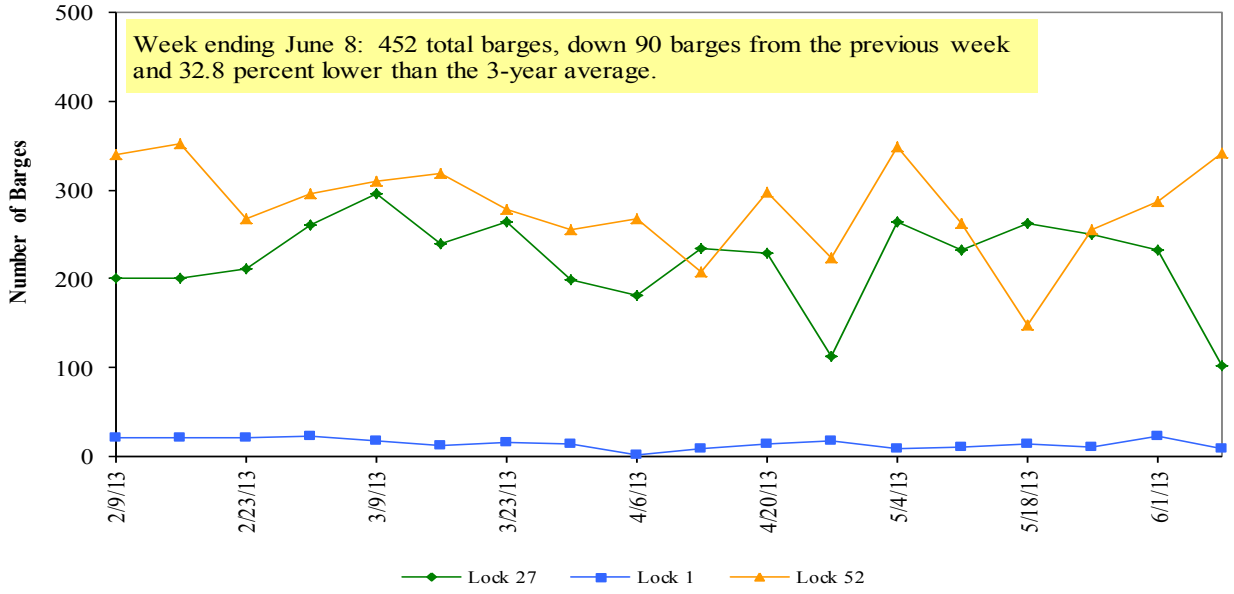
[2] As a percent of same period in 2012.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers

Figure 11

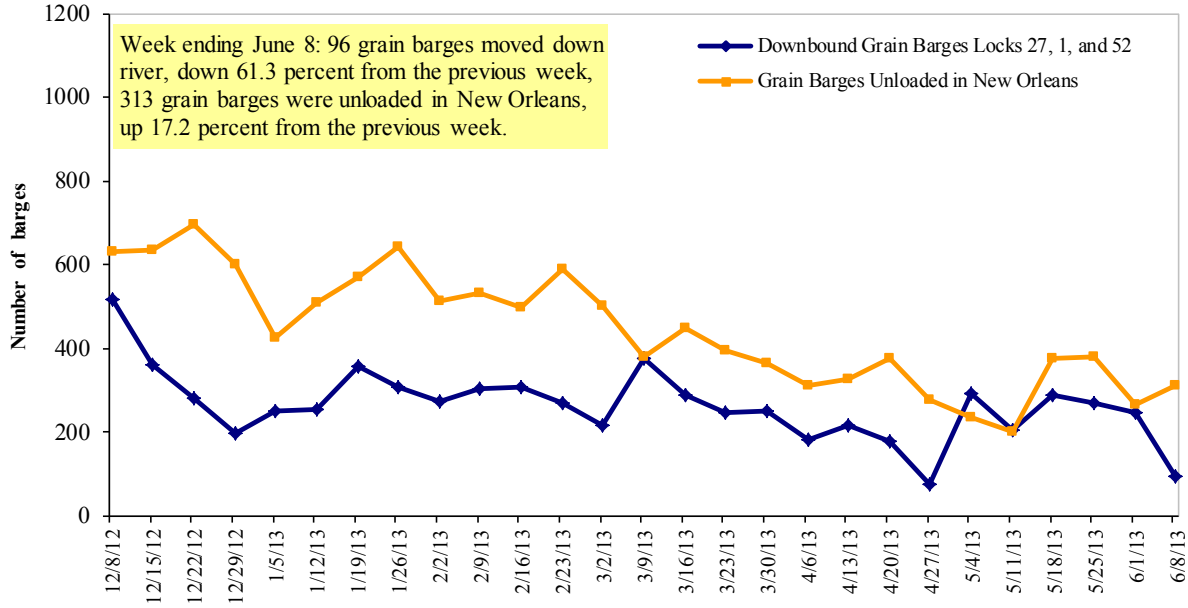
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



Source: U.S. Army Corps of Engineers

Figure 12

Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices[1], Week Ending 6/10/2013 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.839	-0.016	0.021
	New England	3.978	-0.006	0.004
	Central Atlantic	3.907	-0.013	-0.002
	Lower Atlantic	3.762	-0.021	0.041
II	Midwest[2]	3.877	-0.023	0.181
III	Gulf Coast[3]	3.748	-0.022	0.050
IV	Rocky Mountain	3.865	-0.001	-0.008
V	West Coast	3.945	-0.023	-0.046
	West Coast less California	3.870	-0.029	-0.032
	California	4.008	-0.017	-0.058
Total	U.S.	3.849	-0.020	0.068

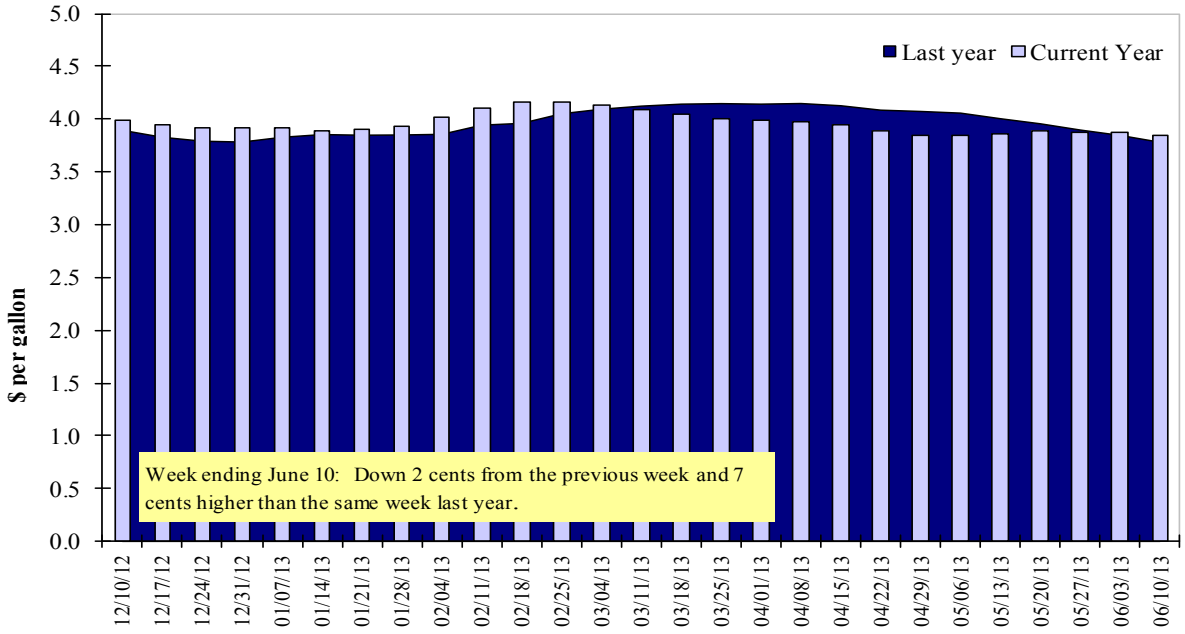
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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]									
5/30/2013	467	353	112	63	11	1,005	3,387	1,747	6,139
This week year ago	396	130	466	297	8	1,296	7,723	5,223	14,242
Cumulative exports-marketing year[2]									
2012/13 YTD	10,019	5,039	5,825	4,619	591	26,093	13,997	34,875	74,965
2011/12 YTD	9,904	4,319	6,312	5,601	491	26,627	30,741	31,139	88,507
YTD 2012/13 as % of 2011/12	101	117	92	82	120	98	46	112	85
Last 4 wks as % of same period 2011/12	219	357	56	42	520	135	49	36	52
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; 2012/13 marketing year ends for wheat

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 05/30/2013	Total Commitments[2]			% change current MY	Exports[3]
	2013/14 Next MY	2012/13 Current MY	2011/12 Last MY	from last MY	2011/12
		- 1,000 mt -			- 1,000 mt -
Japan	839	6,294	10,992	(43)	12,367
Mexico	944	4,154	9,428	(56)	9,617
China	1,343	2,474	4,951	(50)	5,414
Korea	2	418	3,790	(89)	3,639
Venezuela	0	762	1,079	(29)	1,332
Top 5 Importers	**3,128**	**14,101**	**30,239**	**(53)**	**32,369**
Total US corn export sales	**4,845**	**17,383**	**38,463**	**(55)**	**39,180**
% of Projected	15%	98%	98%		
Change from prior week	**52**	**107**	**252**		
Top 5 importers' share of U.S. corn export sales	65%	81%	79%		83%
USDA forecast, June 2013	**33,020**	**17,780**	**39,180**	**(55)**	
Corn Use for Ethanol USDA forecast, Ethanol June 2013	**124,460**	**118,110**	**127,280**	**(7)**	

(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 05/30/2013	Total Commitments[2]			% change current MY from last MY	Exports[3]
	2013/14 Next MY	2012/13 Current MY	2011/12 Last MY		2011/12
		- 1,000 mt -			- 1,000 mt -
China	9,010	21,597	22,649	(5)	24,602
Mexico	104	2,494	3,029	(18)	3,180
Japan	133	1,726	1,709	1	1,891
Indonesia	3	1,465	1,471	(0)	1,741
Egypt	60	677	1,031	(34)	1,292
Top 5 importers	**9,310**	**27,960**	**29,889**	**(6)**	**32,706**
Total US soybean export sales	**11,046**	**36,622**	**36,361**	**1**	**37,060**
% of Projected	28%	101%	98%		
Change from prior week	590	49	220		
Top 5 importers' share of U.S. soybean export sales	84%	76%	82%		
USDA forecast, June 2013	**39,460**	**36,200**	**37,060**	**(2)**	

(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 05/30/2013	Total Commitments[2]			% change current MY from last MY	Exports[3]
	2013/14 Next MY	2012/13 Current MY	2011/12 Last MY		2011/12
		- 1,000 mt -			- 1,000 mt -
Japan	371	3,649	3,845	(5)	3,512
Mexico	747	2,803	3,563	(21)	3,496
Nigeria	198	3,170	3,352	(5)	3,248
Philippines	269	1,957	2,089	(6)	2,039
Korea	173	1,386	2,090	(34)	1,983
Egypt	0	1,678	1,010	66	950
Taiwan	49	1,038	975	6	888
Indonesia	0	534	830	(36)	830
Venezuela	137	656	657	(0)	594
China	1,464	799	590	35	572
Top 10 importers	**3,408**	**17,669**	**19,002**	**(7)**	**18,111**
Total US wheat export sales	**6,221**	**27,098**	**27,923**	**(3)**	**28,560**
% of Projected	23%	99%	98%		
Change from prior week	665	-33	30		
Top 10 importers' share of U.S. wheat export sales	55%	65%	68%		63%
USDA forecast, June 2013	**26,540**	**27,490**	**28,560**	**(4)**	

(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 06/06/13	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 2012	Last 4-weeks as % of 3-yr. avg.	Total[1] 2012
Pacific Northwest									
Wheat	139	114	121	5,202	6,249	83	48	47	12,625
Corn	1	0	n/a	1,255	3,221	39	10	8	5,512
Soybeans	0	0	n/a	3,696	4,773	77	2	5	10,347
Total	**139**	**114**	**122**	**10,153**	**14,243**	**71**	**25**	**26**	**28,484**
Mississippi Gulf									
Wheat	138	106	129	3,815	3,016	127	98	149	5,462
Corn	111	237	47	4,797	9,596	50	60	41	18,068
Soybeans	48	90	53	6,925	8,967	77	38	49	24,684
Total	**297**	**434**	**68**	**15,538**	**21,578**	**72**	**63**	**55**	**48,215**
Texas Gulf									
Wheat	311	178	174	3,556	2,481	143	140	124	5,912
Corn	0	0	n/a	101	295	34	181	35	336
Soybeans	0	0	n/a	122	2	n/a	0	0	626
Total	**311**	**178**	**174**	**3,779**	**2,779**	**136**	**141**	**115**	**6,874**
Interior									
Wheat	35	3	1,341	420	581	72	97	104	1,218
Corn	50	59	85	1,190	3,923	30	90	38	6,115
Soybeans	12	25	49	1,598	2,004	80	43	42	4,204
Total	**98**	**87**	**113**	**3,208**	**6,508**	**49**	**77**	**45**	**11,538**
Great Lakes									
Wheat	14	0	n/a	359	111	322	96	71	481
Corn	0	0	n/a	0	37	0	0	0	56
Soybeans	17	0	n/a	21	84	25	41	80	713
Total	**31**	**0**	**n/a**	**380**	**233**	**163**	**71**	**67**	**1,250**
Atlantic									
Wheat	28	2	1,252	389	169	230	113	175	341
Corn	0	0	n/a	2	80	2	0	0	143
Soybeans	6	2	243	0	480	0	82	107	1,460
Total	**34**	**5**	**721**	**391**	**729**	**54**	**97**	**120**	**1,944**
U.S. total from ports[2]									
Wheat	664	404	165	13,741	12,608	109	90	93	26,040
Corn	162	296	55	7,346	17,153	43	43	32	30,230
Soybeans	83	117	71	12,362	16,310	76	24	37	42,035
Total	**909**	**817**	**111**	**33,449**	**46,070**	**73**	**56**	**54**	**98,305**

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

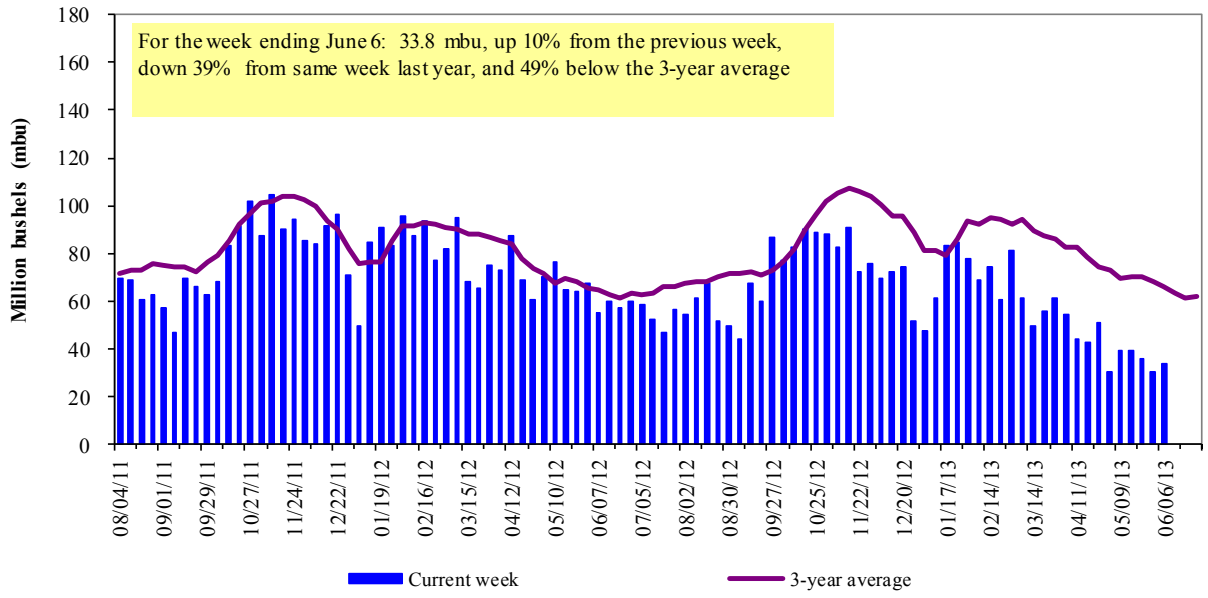
[2] Total includes only port regions shown above; Interior land-based shipments now included.

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)

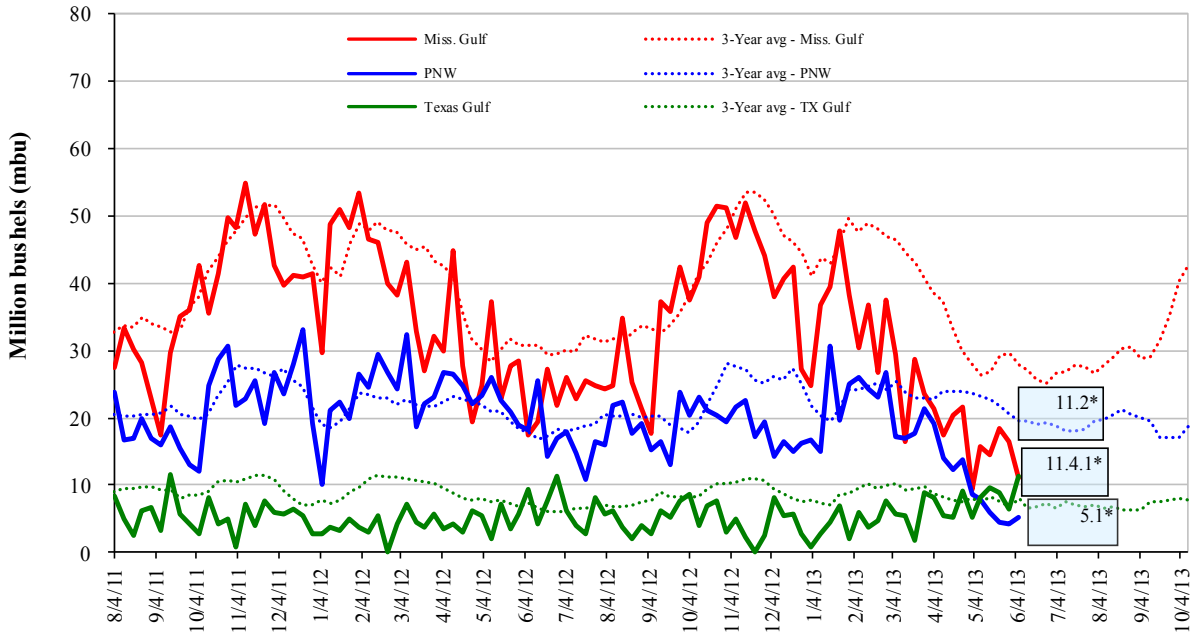


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

June 6 % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 32	up 74	down 2	up 22
Last year (same week)	down 36	up 21	down 16	down 72
3-yr avg. (4-wk mov. avg.)	down 60	up 44	down 37	down 73

Ocean Transportation

Table 17

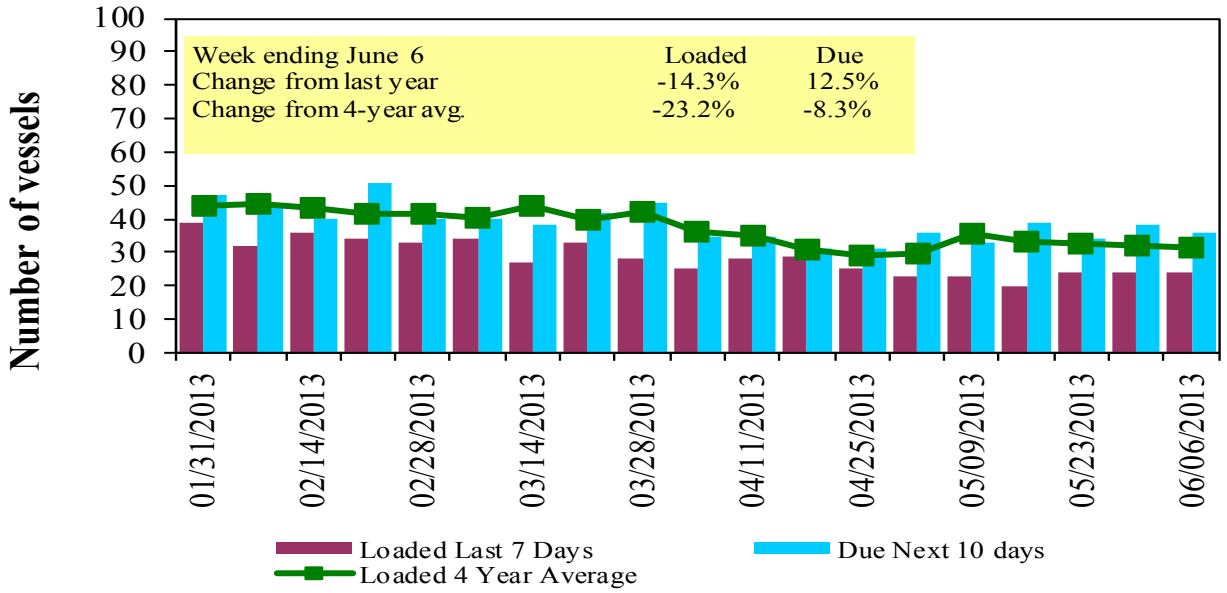
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
6/6/2013	18	24	36	6	n/a
5/30/2013	28	24	38	5	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

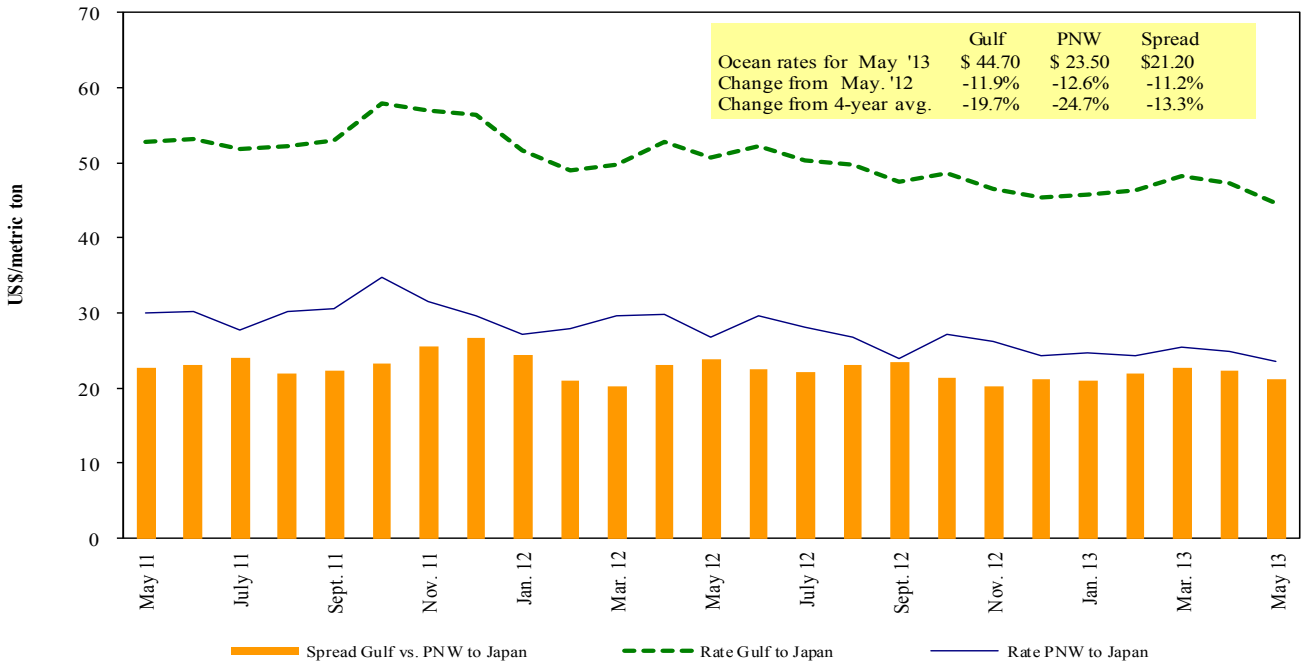
U.S. Gulf[1] Vessel Loading Activity



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 06/08/2013

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Oct 1/Dec 31	55,000	33.00
U.S. Gulf	China	Heavy Grain	Jun 1/3	55,000	41.00
U.S. Gulf	China	Heavy Grain	Jan 25/Feb 5	55,000	43.05
U.S. Gulf	Egypt Med	Heavy Grain	Feb 20/Mar 5	60,000	23.25
PNW	Bangladesh[1]	Wheat	Jun 10/20	4,610	98.00
Brazil	China	Heavy Grain	Jul 20/30	60,000	34.50
Brazil	China	Heavy Grain	Jul 1/30	65,000	36.00
Brazil	China	Heavy Grain	Jun 20/30	60,000	37.00
Brazil	China	Heavy Grain	Jun 10/20	60,000	35.50
Brazil	China	Heavy Grain	Jun 7/16	60,000	34.00
Brazil	China	Heavy Grain	Jun 5/15	60,000	32.50
France	Algeria	Wheat	Apr 15/25	30,000	18.75
River Plate	China	Heavy Grain	Jun 1/10	60,000	39.00
River Plate	Japan	Grain	Jun 1/10	60,000	48.00
River Plate	Grain	Soybean Meals	Jun 1/10	40,000	50.00
River Plate	Egypt	Heavy Grain	Jul 1/10	50,000	33.00
River Plate	Egypt	Heavy Grain	May 1/10	45,000	40.00

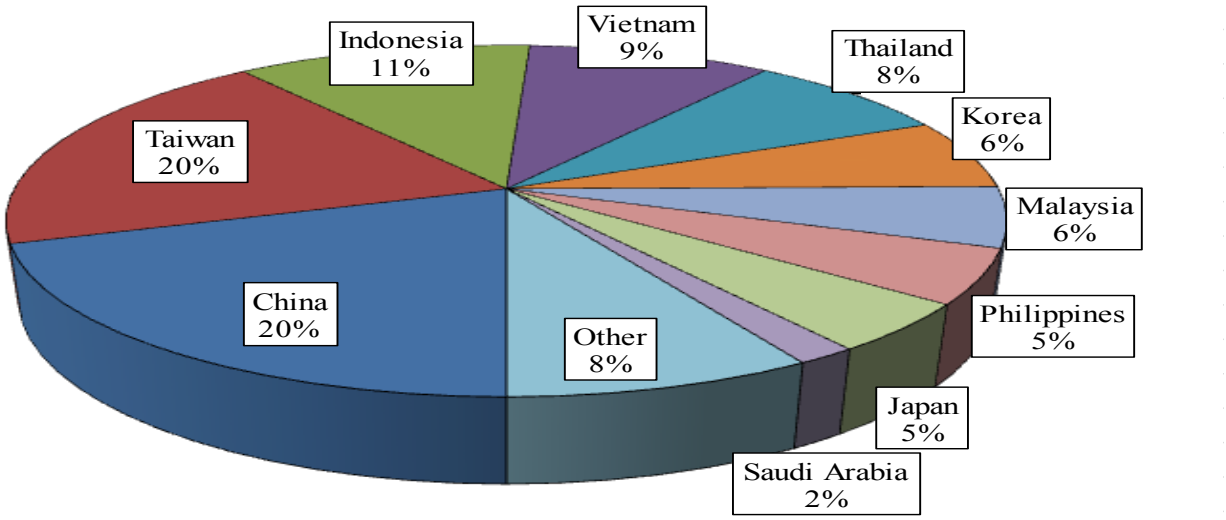
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

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

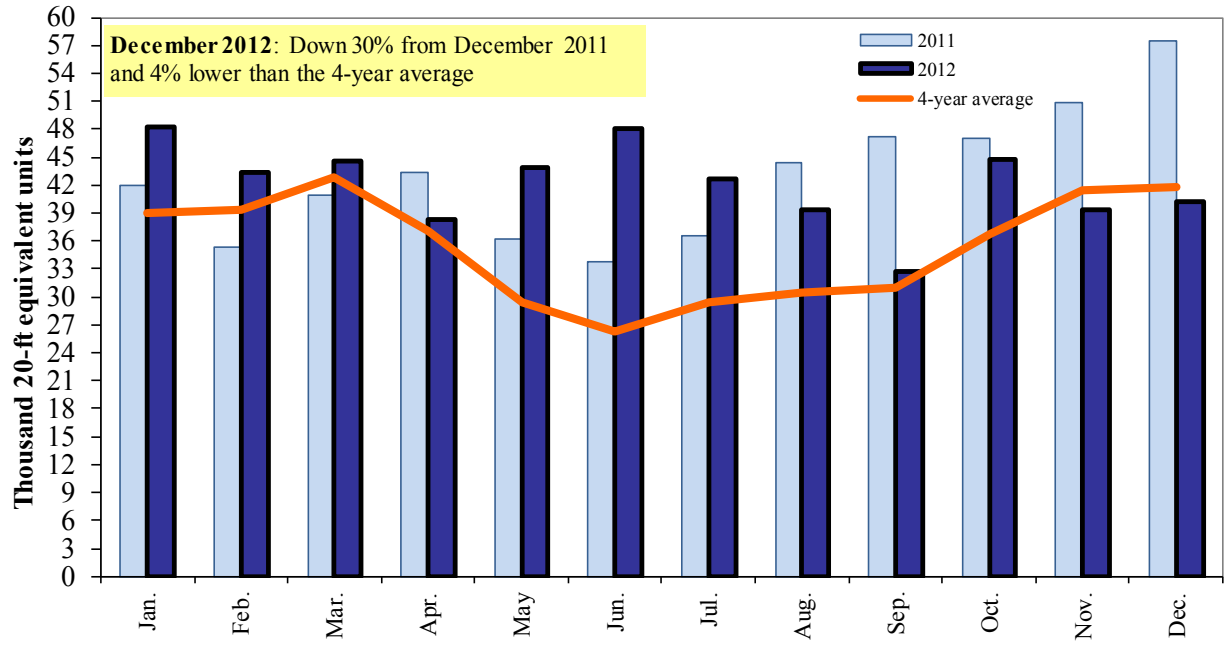
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, December 2012



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

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

Figure 19
Monthly Shipments of Containerized Grain to Asia



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

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

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