Grain Transportation Report

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

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Contents

The next release is June 21, 2012

WEEKLY HIGHLIGHTS

ITC Relies on USDA Brazil Soybean Transportation Reports for its Competitiveness Study

In April, US International Trade Commission (ITC) released a study, Brazil: Competitive Factors in Brazil Affecting U.S. and Brazilian Agricultural Sales in Selected Third Country Markets. The ITC report used parts of the *Soybean Transportation Guide: Brazil 2009-2010* editions and the quarterly *Brazil Soybean Transportation Reports* to analyze Brazil's transportation infrastructure and government policy. These two factors most broadly affect Brazilian agricultural competitiveness. In June, USDA released the most recent Soybean Transportation Guide: Brazil 2011. Quarterly updates comparing transportation and landed costs of soybeans exported from the United States and Brazil to China and Europe are published in the GTR (see this week's GTR feature article).

Grain Inspections Lowest Since January

For the week ending June 7, **total inspections of grain** (wheat, corn, soybeans) for export reached 1.41 million metric tons mmt), down 20 percent from the past week and 21 percent below last year this time. Total grain inspections were down for each of the major grains and were the lowest since January 5 (1.32 mmt). Inspections were down primarily for corn (.433 mmt) and soybeans (.387 mmt). Corn inspections dropped 38 percent as shipments to Asia decreased 68 percent, and soybean inspections decreased 17 percent because of fewer shipments to Europe and Mexico. Total wheat inspections (.586 mmt) remained steady, with the last four week running average increasing 14 percent above the 3-year average.

June Shuttle Secondary Railcar Bids/Offers Take a Fall

Average June shuttle **secondary railcar bids/offers per car** took a dive during the week ending June 7. Average shuttle bids were $487.50 below tariff, down $185 from last week and $275 lower than last year. This was driven mainly by a $212 drop in bids for Union Pacific shuttles, showing low demand for the rest of June. A similar drop 2 years ago was followed by continued low weekly carloads of grain through the end of June. Lower amounts of grain shipments so far this year are reflected by the low demand for secondary rail market shuttle railcars. However, demand in the non-shuttle market has remained relatively consistent week-to-week with average non-shuttle secondary railcar bids/offers per car at $5 above tariff, down $11 from last week and $9 lower than last year.

USDA Lowers Projected World Wheat Production and Exports

In its June World Agricultural Supply and Demand Estimates report, USDA lowered projected global wheat production and exports from its May projections. Global 2012/13 wheat production (672 mmt) was lowered by 5.5 mmt, reflecting reduced crop prospects in several exporting countries. It was mostly pulled down by a drop of 3 mmt in the projected Russian wheat harvest due to prolonged spring dryness. Global wheat export projections were reduced by a net of 1.6 mmt, with most of the decreases occurring in Russia (2.0 mmt). The India wheat export projection was raised by 1.0 mmt and the U.S. wheat export projection was left unchanged. The U.S. wheat marketing year started on June 1. Rail and barge sectors appear to be ready for the transportation needs to move U.S. wheat to export markets.

Snapshots by Sector

Rail

U.S. railroads originated 19,518 **carloads of grain** during the week ending June 2, down 7 percent from last week, 7 percent from last year, and 2 percent higher than the 3-year average.

Ocean

During the week ending June 7, 28 **ocean-going grain vessels** were loaded in the Gulf, unchanged from the same period last year. Thirty-two vessels are expected to be loaded within the next 10 days, 14 percent less than the same period last year.

During the week ending June 8, the **ocean freight rate** for shipping bulk grain from the Gulf to Japan was $49 per mt, up 1 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was $24.50 per mt, up 2 percent from the previous week.

Barge

During the week ending June 9, **barge grain movements** totaled 569,400 tons, 8 percent lower than the previous week and 1 percent lower than the same period last year.

Fuel

During the week ending June 11, U.S. average **diesel fuel prices** decreased 6 cents to $3.78 per gallon—17 cents lower than the same week last year.

Feature Article/Calendar

First Quarter Soybean Shipment Costs Mixed; Yearly Costs Declined

Changes in the costs of shipping soybeans from the United States and Brazil to Europe and China varied by shipping point and export destination quarter to quarter but declined significantly on average year over year. Transportation costs of shipping soybeans from Minneapolis, MN, and Davenport, IA, to Hamburg, Germany, increased by 4 and 2 percent, respectively, compared to the previous quarter (Table 1). The costs of shipping soybeans from Minneapolis to Shanghai, China, increased approximately 1 percent; the cost from Davenport remained relatively unchanged (Table 2). However, the costs of shipping from Fargo, ND, and Sioux Falls, SD, to Shanghai declined by 4 percent each compared to the previous quarter.

The cost of shipping soybeans from North Mato Grosso (MT) to Hamburg increased by 2 percent, and the transportation cost from South Goias (GO) remained relatively unchanged from the last quarter. The cost of transporting from North MT to Shanghai remained unchanged, while the cost of transporting from South GO declined by 2 percent.

Table 1-Quarterly costs of transporting soybeans from U.S. and Brazil to Hamburg, Germany

	2011 1st qtr.	2011 4th qtr.	2012 1st qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2011 1st qtr.	2011 4th qtr.	2012 1st qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.
	United States (via U.S. Gulf)									
	Minneapolis, MN --$/mt--					Davenport, IA --$/mt--				
Truck	11.34	10.22	9.14	-19.40	-10.57	11.34	10.22	9.14	-19.40	-10.57
Barge	21.38	35.28	12.53	-41.39	-64.48	21.38	28.91	12.53	-41.39	-56.66
Ocean[1]	23.13	25.08	19.91	-13.92	-20.61	23.13	25.08	19.91	-13.92	-20.61
Rail	34.67	-	31.61	-8.83	-	26.44	-	24.16	-8.62	-
Total transportation[2]	90.52	70.58	73.19	-19.14	3.70	82.29	64.21	65.74	-20.11	2.38
Farm Value[3]	438.47	418.88	447.05	1.96	6.73	449.50	425.00	448.27	-0.27	5.48
Landed Cost	528.99	489.46	520.24	-1.65	6.29	531.79	489.21	514.01	-3.34	5.07
Transport % of landed cost	17.11	14.42	14.07			15.47	13.13	12.79		
	Brazil									
	North MT[4] - Santos[5] --$/mt--					South GO[4] - Paranagua[5] --$/mt--				
Truck	124.57	115.05	117.52	-5.66	2.15	61.96	54.06	55.14	-11.01	2.00
Ocean[6]	34.96	32.00	32.00	-8.47	0.00	33.86	32.63	31.58	-6.73	-3.22
Total transportation[2]	159.53	147.05	149.52	-6.27	1.68	95.82	86.69	86.72	-9.50	0.03
Farm Value[7]	406.96	358.24	377.70	-7.19	5.43	441.07	379.70	401.58	-8.95	5.76
Landed Cost	566.49	505.29	527.22	-6.93	4.34	536.89	466.39	488.30	-9.05	4.70
Transport % of landed cost	28.16	29.10	28.36			17.85	18.59	17.76		

[1] Source: O'Neil Commodity Consulting

[3] Source: USDA/NASS

[4] Producing regions: MT= Mato Grosso, GO = Goiás

[5] Export ports

[6] Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS

[7] Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br

Note: Total may not add exactly due to rounding

Truck and ocean rates declined in the United States during the quarter due to decreased demand for trucking services and sluggish demand for bulk shipping. In addition to a general decline during the quarter, barge rates fell because of limited demand after the peak harvest activity in 2011. Last year's first quarter rates were elevated due to flooding that limited barge traffic during 2011. During the typical first quarter, grain is railed from Minneapolis and Davenport to the St. Louis area when the upper Mississippi River is closed for the winter. However, the costs of shipping to Hamburg and Shanghai fell significantly from the first quarter of last year. Shipping costs from Minneapolis and Davenport to Hamburg fell 19 and 20 percent from last year; they fell 16 and 17 percent to Shanghai . However, the cost of shipping from Sioux Falls remained the same as last year, and the cost from Fargo increased slightly by 3 percent. Year-to-year transportation costs also fell in Brazil.

First quarter farm prices increased in the United States and Brazil over the previous quarter. However, year-to-year price changes are mixed. Farmers in Brazil received lower prices for their soybean crops than last year. Farmers in Fargo and Sioux Falls received about 1 percent less than last year. Minneapolis farmers received about 2 percent more, and farmers in Davenport received the same as last year. Overall, U.S. transportation costs represented a smaller share of the landed costs than did Brazil's. Transportation share of the landed costs ranged from 13–18 percent in the United States and 18–30 percent in Brazil.

Table 2-Quarterly costs of transporting soybeans from U.S. and Brazil to Shanghai, China

	2011 1st qtr.	2011 4th qtr.	2012 1st qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2011 1st qtr.	2011 4th qtr.	2012 1st qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.
	United States (via U.S. Gulf)									
	Minneapolis, MN					Davenport, IA				
	--$/mt--					--$/mt--				
Truck	11.34	10.22	9.14	-19.40	-10.57	11.34	10.22	9.14	-19.40	-10.57
Barge	21.38	35.28	12.53	-41.39	-64.48	21.38	28.91	12.53	-41.39	-56.66
Ocean[1]	53.79	55.33	48.33	-10.15	-12.65	53.79	55.33	48.33	-10.15	-12.65
Rail	34.67	-	31.61	-8.83	-	26.44	-	24.16	-8.62	-
Total transportation[2]	121.18	100.83	101.61	-16.15	0.77	112.95	94.46	94.16	-16.64	-0.32
Farm Value[3]	438.47	418.88	447.05	1.96	6.73	449.50	425.00	448.27	-0.27	5.48
Landed Cost	559.65	519.71	548.66	-1.96	5.57	562.45	519.46	542.43	-3.56	4.42
Transport % of landed cost	21.65	19.40	18.52			20.08	18.18	17.36		
	Via PNW									
	Fargo, ND					Sioux Falls, SD				
Truck	11.34	10.22	9.14	-19.40	-10.57	11.34	10.22	9.14	-19.40	-10.57
Ocean[1]	30.92	29.79	26.54	-14.17	-10.91	30.92	29.79	26.54	-14.17	-10.91
Rail	44.84	54.05	54.25	20.99	0.37	49.69	55.77	56.00	12.70	0.41
Total transportation[2]	87.10	94.06	89.93	3.25	-4.39	91.95	95.78	91.68	-0.29	-4.28
Farm Value[3]	438.47	415.20	434.80	-0.84	4.72	448.27	417.65	445.82	-0.55	6.74
Landed Cost	525.57	509.26	524.73	-0.16	3.04	540.22	513.43	537.50	-0.50	4.69
Transport % of landed cost	16.57	18.47	17.14			17.02	18.65	17.06		
	Brazil									
	North MT[4] - Santos[5]					South GO[4] - Paranagua[5]				
	--$/mt--					--$/mt--				
Truck	124.57	115.05	117.52	-5.66	2.15	61.96	54.06	55.14	-11.01	2.00
Ocean[6]	50.00	49.65	46.62	-6.76	-6.10	56.25	55.80	52.32	-6.99	-6.24
Total transportation[2]	174.57	164.70	164.14	-5.97	-0.34	118.21	109.86	107.46	-9.09	-2.18
Farm Value [7]	406.96	358.24	377.70	-7.19	5.43	441.07	379.70	401.58	-8.95	5.76
Landed Cost	581.53	522.94	541.84	-6.83	3.61	559.28	489.56	509.04	-8.98	3.98
Transport % of landed cost	30.02	31.50	30.29			21.14	22.44	21.11		

[1]Source: O'Neil Commodity Consulting

[3]Source: USDA/NASS

[4]Producing regions: MT= Mato Grosso, GO = Goiás

[5]Export ports

[6]Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS

[7]Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br

Note: Total may not add exactly due to rounding

Market Outlook: China's demand for soybeans continues to be strong, fueled in part by population growth, consumers' affluence and stagnant domestic production capabilities. Chinese soybean imports for marketing year (MY) 2011/12 are expected to increase from 52.4 million metric ton (mmt) in MY10/11 to 55.8 mmt in MY11/12—a 7 percent increase (**USDA, FAS GAIN Report #: CH12020**). The United States is currently the leading supplier of soybeans to China, exporting a total of 24.98 mmt in MY10/11. During January-December of 2011, about 7.78 mmt of U.S. soybeans were exported to China, with a value close to $3.78 billion. Transportation costs could remain moderate in the current environment of slow economic growth, keeping U.S. crops competitive to foreign buyers such as China and others. For more on Brazil soybean transportation, see Brazil Soybean Transportation. Surajudeen.olowolayemo@ams.usda.gov

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
Week ending		Unit Train	Shuttle		Gulf	Pacific
06/13/12	254	229	185	158	219	174
06/06/12	258	230	193	158	217	170

[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	6/8/2012	5/31/2012
Corn	IL--Gulf	-0.48	-0.48
Corn	NE--Gulf	-0.61	-0.61
Soybean	IA--Gulf	-1.15	-1.17
HRW	KS--Gulf	-1.34	-1.42
HRS	ND--Portland	-1.38	-1.74

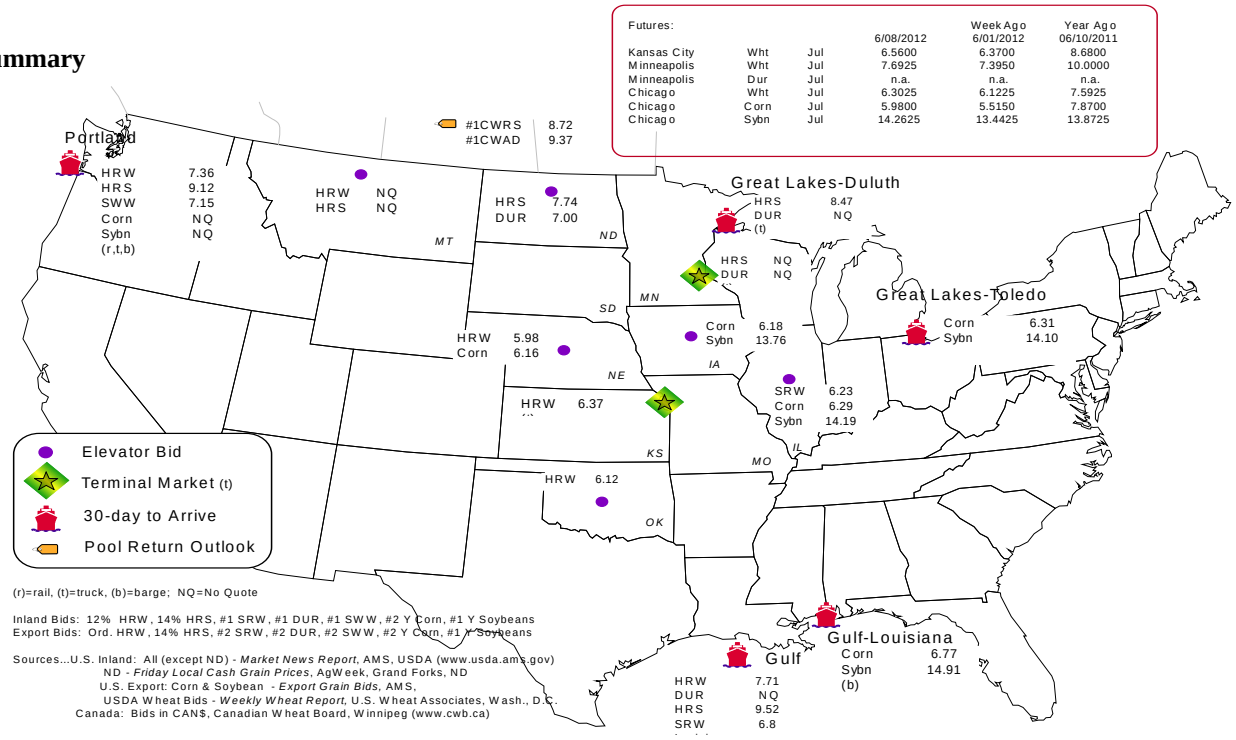
Note: nq = no quote

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	Cross-Border Mexico	Pacific Northwest	Atlantic & East Gulf	Total
6/06/2012[p]	215	1,562	1,063	2,972	105	5,917
5/30/2012[r]	19	1,684	1,246	3,717	190	6,856
2012 YTD[r]	3,819	17,154	28,455	97,090	9,787	156,305
2011 YTD[r]	20,425	51,489	21,281	90,257	14,322	197,774
2012 YTD as % of 2011 YTD	19	33	134	108	68	79
Last 4 weeks as % of 2011[2]	12	63	90	94	91	81
Last 4 weeks as % of 4-year avg.[2]	14	92	124	98	86	94
Total 2011	27,358	77,515	48,782	191,092	24,088	368,835
Total 2010	33,971	83,492	42,794	177,896	32,780	370,933

[1] Data is incomplete as it is voluntarily provided

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

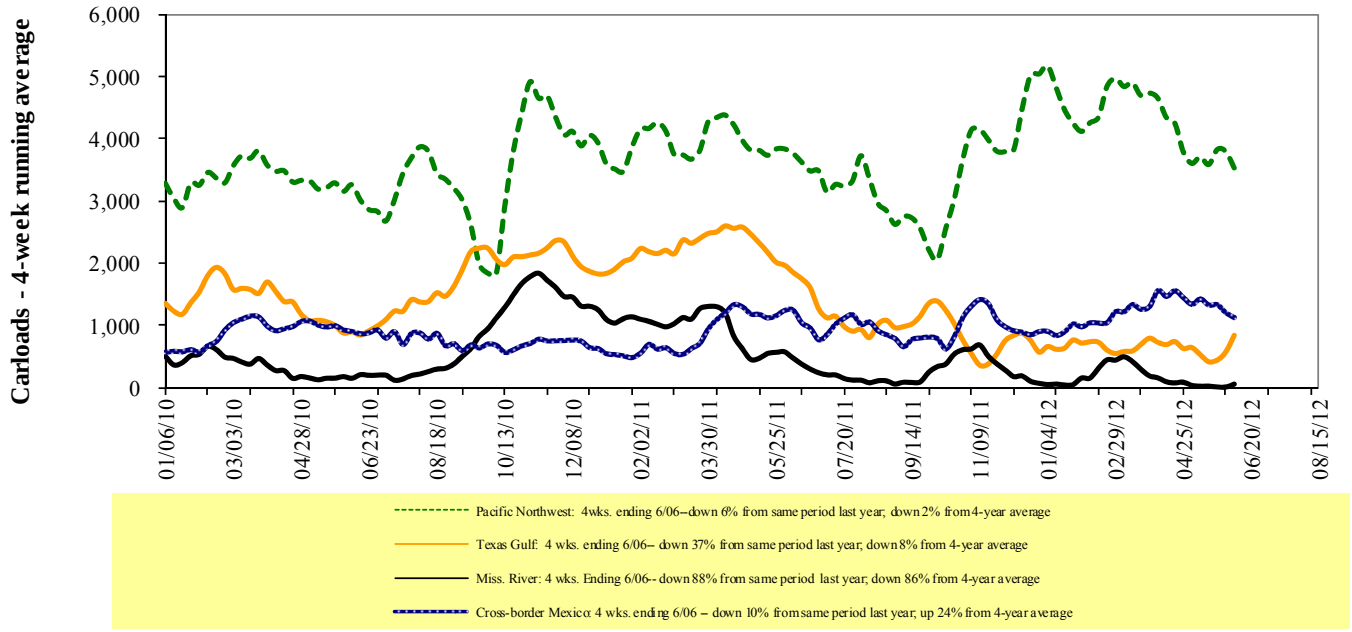
YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

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)

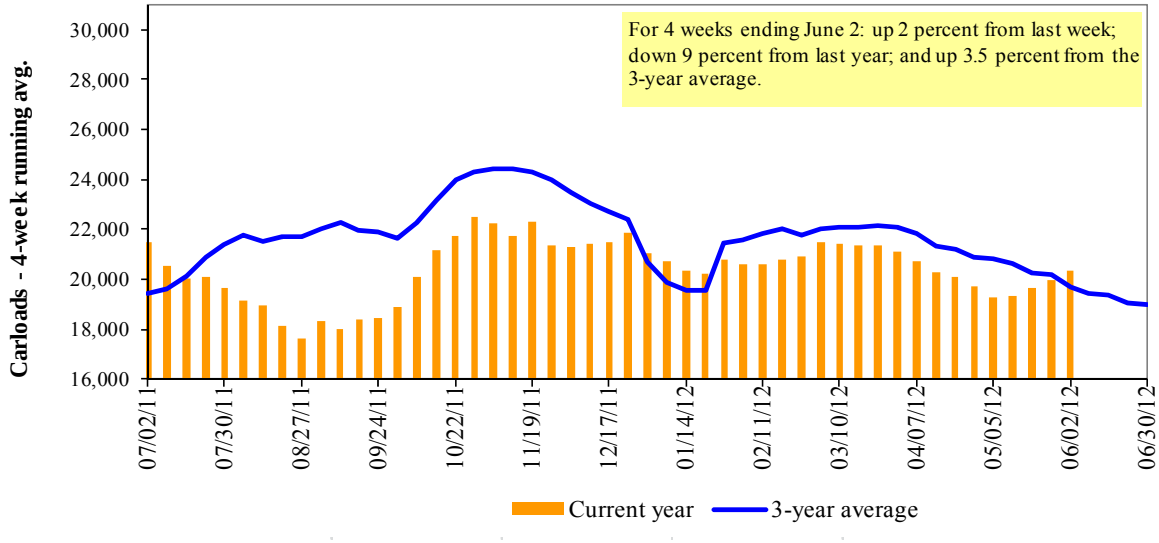
Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
06/02/12	1,683	2,696	8,823	548	5,768	19,518	3,382	3,138
This week last year	1,704	3,513	8,710	985	6,024	20,936	3,459	4,805
2012 YTD	43,569	62,239	221,336	10,874	113,727	451,745	85,104	104,525
2011 YTD	45,653	67,444	249,198	14,652	135,810	512,757	88,710	106,014
2012 YTD as % of 2011 YTD	95	92	89	74	84	88	96	99
Last 4 weeks as % of 2011[1]	92	82	94	70	93	91	96	64
Last 4 weeks as % of 3-yr avg.[1]	88	92	112	79	111	105	93	67
Total 2011	98,506	150,869	546,090	34,683	292,401	1,122,549	200,610	269,399

[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							
6/7/2012	Jun-12	Jun-11	Jul-12	Jul-11	Aug-12	Aug-11	Sep-12	Sep-11
BNSF[3]								
COT grain units	0	no bids	0	no offer	1	39	5	51
COT grain single-car[5]	0	0 . . 1	0 . . 5	0 . . 1	2 . . 16	0 . . 67	no offer	0 . . 77
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.

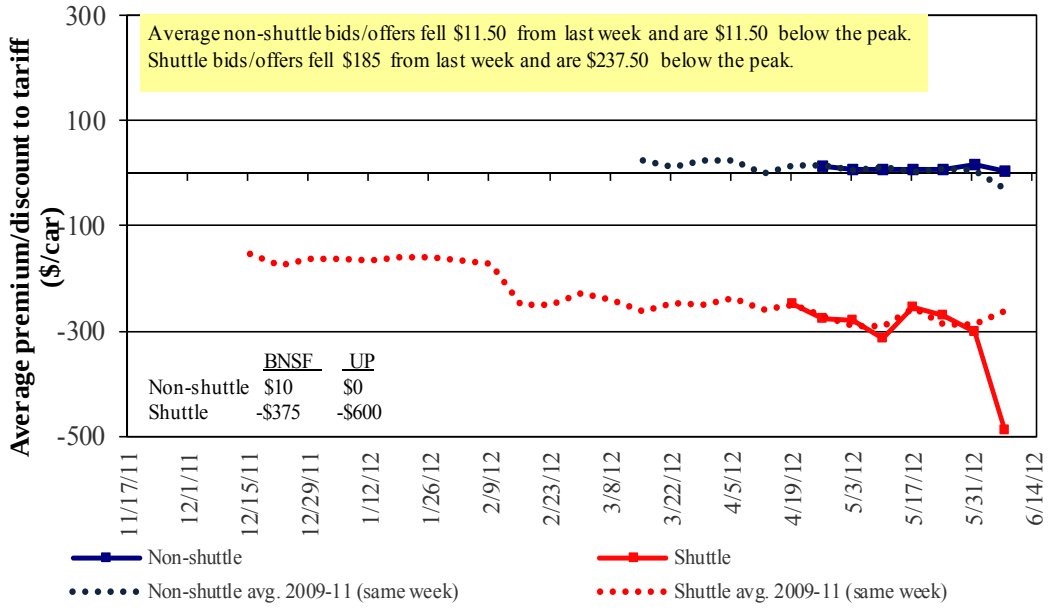
[5]Range is shown because average is not available. Not available = n/a.

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 2012, Secondary Market

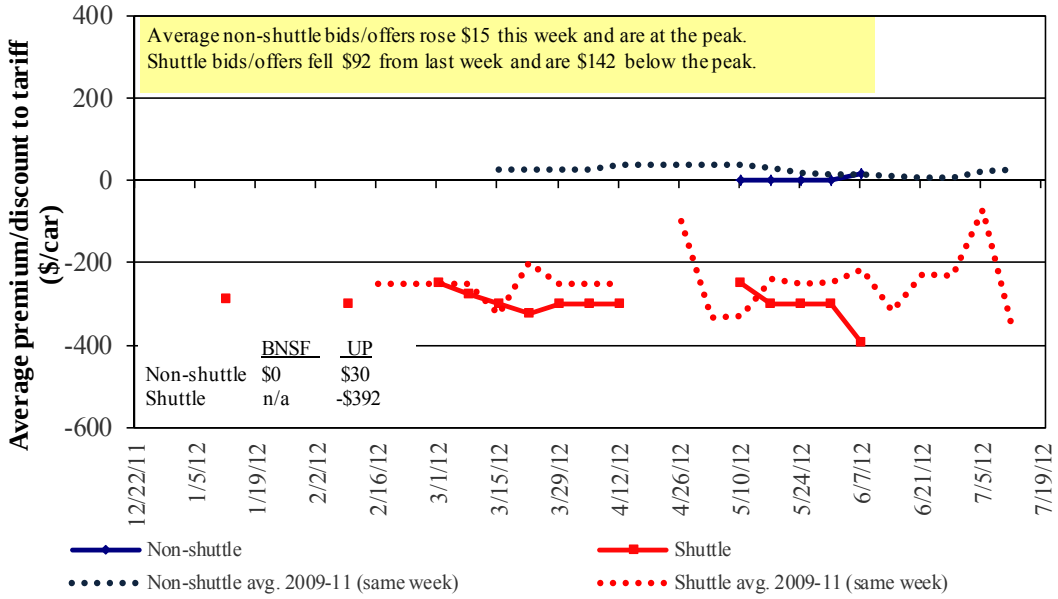


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in July 2012, Secondary Market

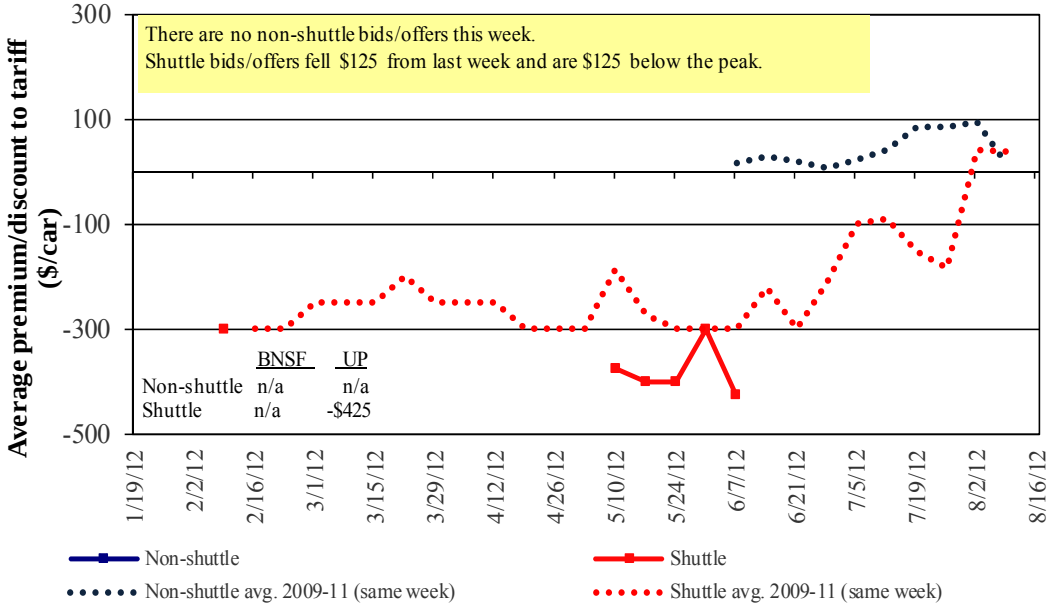


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in August 2012, 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					
6/7/2012	Jun-12	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12
Non-shuttle						
BNSF-GF	10	-	n/a	n/a	n/a	n/a
Change from last week	2	-	n/a	n/a	n/a	n/a
Change from same week 2011	(3)	(75)	n/a	n/a	n/a	n/a
UP-Pool	-	30	n/a	n/a	138	n/a
Change from last week	(25)	n/a	n/a	n/a	38	n/a
Change from same week 2011	(15)	5	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	(375)	n/a	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 2011	(275)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(600)	(392)	(425)	(250)	425	n/a
Change from last week	(212)	(92)	(125)	-	(25)	n/a
Change from same week 2011	(275)	(42)	(125)	-	(175)	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 Shipments[1]

Effective date: 6/1/2012	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	$2,992	$207	$31.77	$0.86	0
	Grand Forks, ND	Duluth-Superior, MN	$3,260	$122	$33.59	$0.91	15
	Wichita, KS	Los Angeles, CA	$6,026	$627	$66.07	$1.80	5
	Wichita, KS	New Orleans, LA	$3,645	$365	$39.82	$1.08	4
	Sioux Falls, SD	Galveston-Houston, TX	$5,573	$515	$60.46	$1.65	3
	Northwest KS	Galveston-Houston, TX	$3,912	$400	$42.82	$1.17	4
	Amarillo, TX	Los Angeles, CA	$4,112	$556	$46.36	$1.26	4
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,038	$412	$34.26	$0.93	7
	Toledo, OH	Raleigh, NC	$4,382	$459	$48.07	$1.31	15
	Des Moines, IA	Davenport, IA	$1,934	$87	$20.07	$0.55	5
	Indianapolis, IN	Atlanta, GA	$3,821	$345	$41.37	$1.13	18
	Indianapolis, IN	Knoxville, TN	$3,273	$221	$34.70	$0.94	17
	Des Moines, IA	Little Rock, AR	$3,074	$257	$33.08	$0.90	4
	Des Moines, IA	Los Angeles, CA	$4,985	$747	$56.93	$1.55	3
Soybeans	Minneapolis, MN	New Orleans, LA	$3,249	$454	$36.78	$1.00	5
	Toledo, OH	Huntsville, AL	$3,497	$326	$37.96	$1.03	18
	Indianapolis, IN	Raleigh, NC	$4,453	$462	$48.81	$1.33	15
	Indianapolis, IN	Huntsville, AL	$3,189	$221	$33.86	$0.92	21
	Champaign-Urbana, IL	New Orleans, LA	$3,382	$412	$37.68	$1.03	7
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,351	$361	$36.86	$1.00	3
	Wichita, KS	Galveston-Houston, TX	$3,634	$281	$38.88	$1.06	15
	Chicago, IL	Albany, NY	$3,645	$430	$40.47	$1.10	4
	Grand Forks, ND	Portland, OR	$4,832	$623	$54.17	$1.47	3
	Grand Forks, ND	Galveston-Houston, TX	$5,854	$649	$64.58	$1.76	4
	Northwest KS	Portland, OR	$4,793	$656	$54.11	$1.47	2
Corn	Minneapolis, MN	Portland, OR	$4,800	$759	$55.20	$1.50	3
	Sioux Falls, SD	Tacoma, WA	$4,760	$695	$54.17	$1.47	3
	Champaign-Urbana, IL	New Orleans, LA	$2,857	$412	$32.47	$0.88	6
	Lincoln, NE	Galveston-Houston, TX	$3,310	$405	$36.89	$1.00	4
	Des Moines, IA	Amarillo, TX	$3,430	$323	$37.27	$1.01	3
	Minneapolis, MN	Tacoma, WA	$4,800	$753	$55.14	$1.50	3
	Council Bluffs, IA	Stockton, CA	$4,200	$779	$49.44	$1.35	3
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,040	$695	$56.95	$1.55	4
	Minneapolis, MN	Portland, OR	$5,030	$759	$57.49	$1.56	4
	Fargo, ND	Tacoma, WA	$4,930	$618	$55.09	$1.50	4
	Council Bluffs, IA	New Orleans, LA	$3,710	$476	$41.57	$1.13	5
	Toledo, OH	Huntsville, AL	$2,672	$326	$29.77	$0.81	5
	Grand Island, NE	Portland, OR	$5,115	$671	$57.46	$1.56	12

[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: 6/1/2012							
				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	$7,741	$659	$85.83	$2.33	12
	OK	Cuautitlan, EM	$6,780	$801	$77.46	$2.11	10
	KS	Guadalajara, JA	$7,444	$774	$83.97	$2.28	6
	TX	Salinas Victoria, NL	$3,725	$302	$41.14	$1.12	9
Corn	IA	Guadalajara, JA	$7,699	$910	$87.96	$2.23	8
	SD	Penjamo, GJ	$7,776	$863	$88.27	$2.24	17
	NE	Queretaro, QA	$7,073	$808	$80.53	$2.04	3
	SD	Salinas Victoria, NL	$5,650	$656	$64.43	$1.63	5
	MO	Tlalnepantla, EM	$6,518	$785	$74.62	$1.89	8
	SD	Torreon, CU	$6,522	$722	$74.02	$1.88	14
Soybeans	MO	Bojay (Tula), HG	$7,350	$768	$82.94	$2.26	8
	NE	Guadalajara, JA	$7,904	$878	$89.73	$2.44	4
	IA	El Castillo, JA[5]	$8,255	$857	$93.11	$2.53	6
	KS	Torreon, CU	$6,421	$544	$71.17	$1.94	4
Sorghum	OK	Cuautitlan, EM	$5,670	$655	$64.62	$1.64	6
	TX	Guadalajara, JA	$6,653	$561	$73.71	$1.87	6
	NE	Penjamo, GJ	$7,426	$783	$83.88	$2.13	6
	KS	Queretaro, QA	$6,425	$492	$70.67	$1.79	4
	NE	Salinas Victoria, NL	$5,128	$576	$58.28	$1.48	6
	NE	Torreon, CU	$6,068	$643	$68.57	$1.74	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

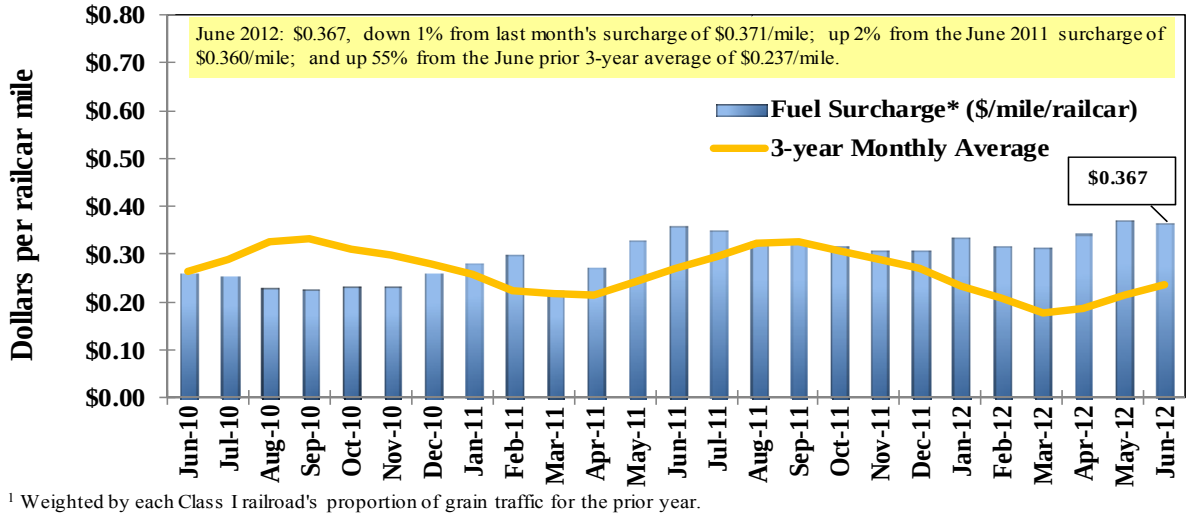
[4]Percentage change year over year calculated using tariff rate plus fuel surchage

[5] Beginning 12/6/10, El Castillo, JA 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.

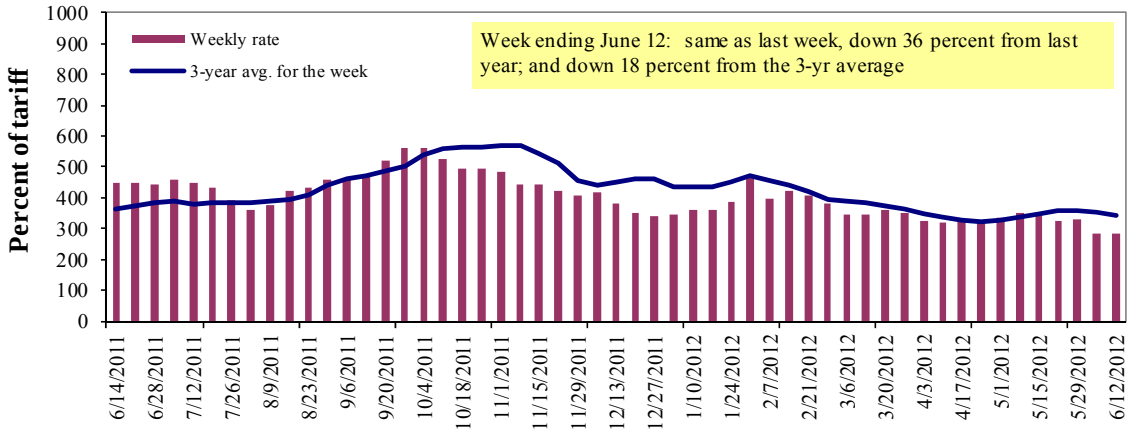
* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

** 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]	6/12/2012	386	320	284	218	266	266	200
	6/5/2012	389	320	285	220	264	264	204
$/ton	6/12/2012	23.89	17.02	13.18	8.70	12.48	10.75	6.28
	6/5/2012	24.08	17.02	13.22	8.78	12.38	10.67	6.41
Current week % change from the same week:								
	Last year	-28	-33	-36	-36	-33	-33	-35
	3-year avg.[2]	-9	-12	-18	-13	-12	-12	-13
Rate[1]	July	408	335	308	235	284	284	218
	September	569	543	545	456	548	548	431

[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

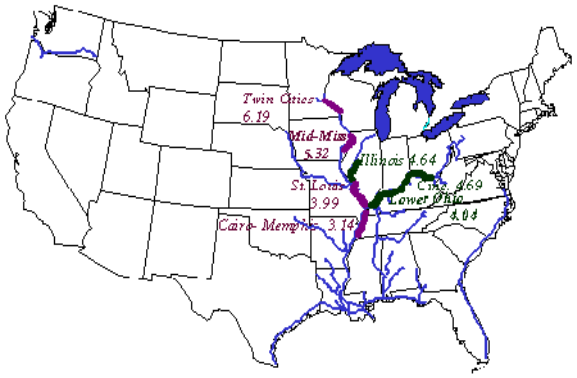
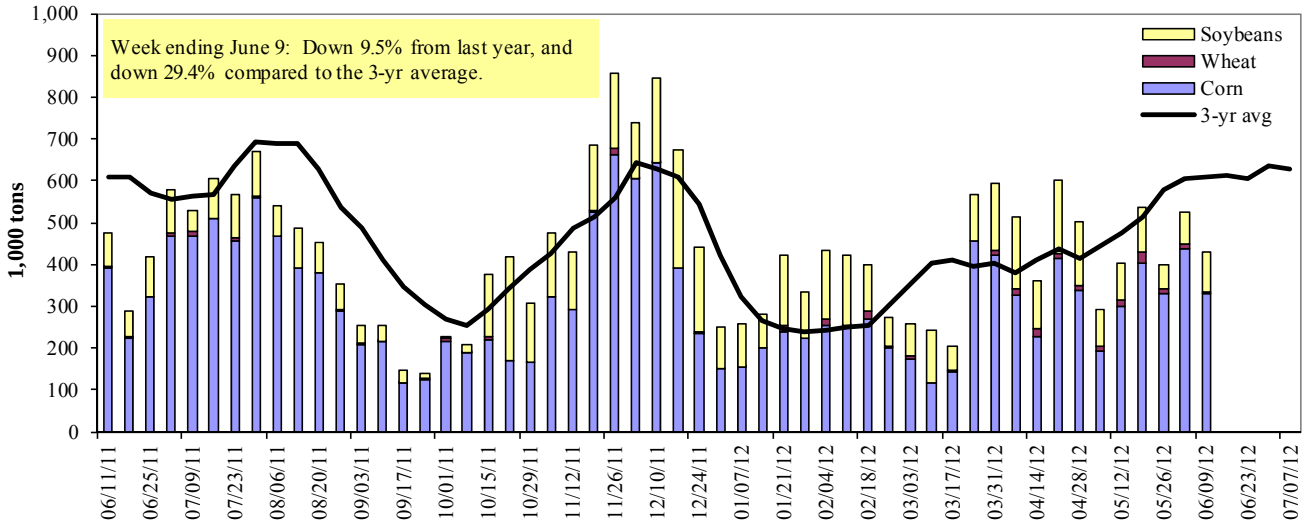


Figure 10

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 (www.mvr.usace.army.mil/mvrimi/omni/webrpts/default.asp)

Table 10

Barge Grain Movements (1,000 tons)

Week ending 6/9/2012	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	184	0	64	0	248
Winfield, MO (L25)	241	0	55	0	296
Alton, IL (L26)	354	6	75	0	435
Granite City, IL (L27)	330	6	93	0	430
Illinois River (L8)	69	6	25	0	100
Ohio River (L52)	46	12	40	1	98
Arkansas River (L1)	0	39	3	0	42
Weekly total - 2012	376	57	135	1	569
Weekly total - 2011	443	28	93	10	574
2012 YTD[1]	8,420	874	4,633	135	14,062
2011 YTD	8,222	543	3,584	146	12,495
2012 as % of 2011 YTD	102	161	129	93	113
Last 4 weeks as % of 2011[2]	85	75	111	47	92
Total 2011	19,921	1,460	8,553	422	30,356

[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.

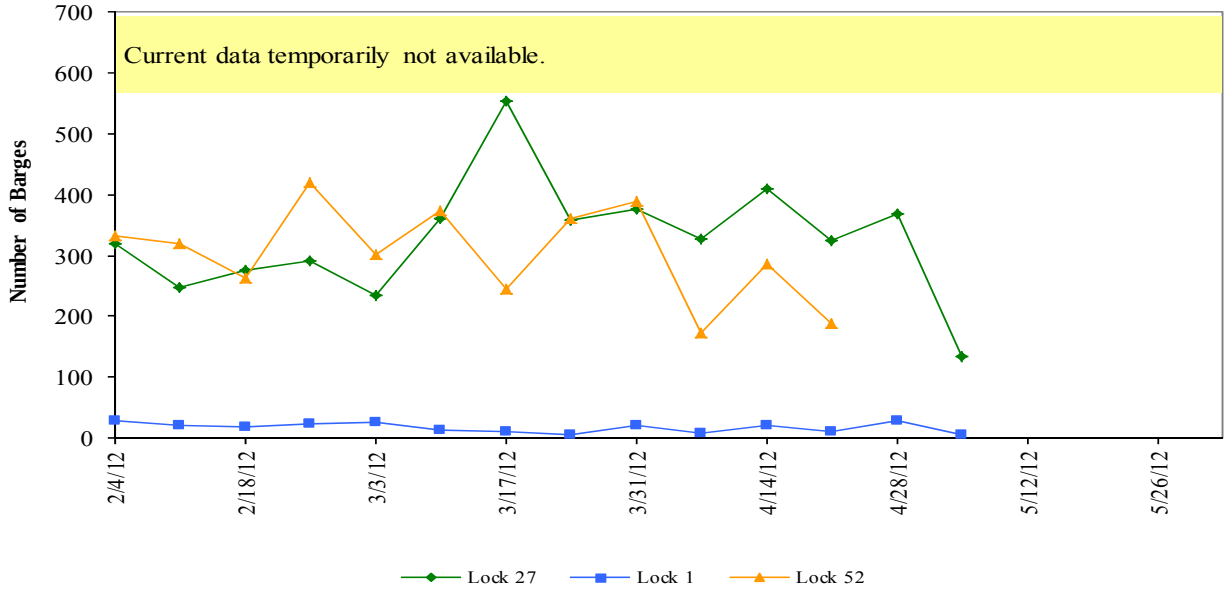
[2] As a percent of same period in 2011.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webrpts/default.asp)

Figure 11

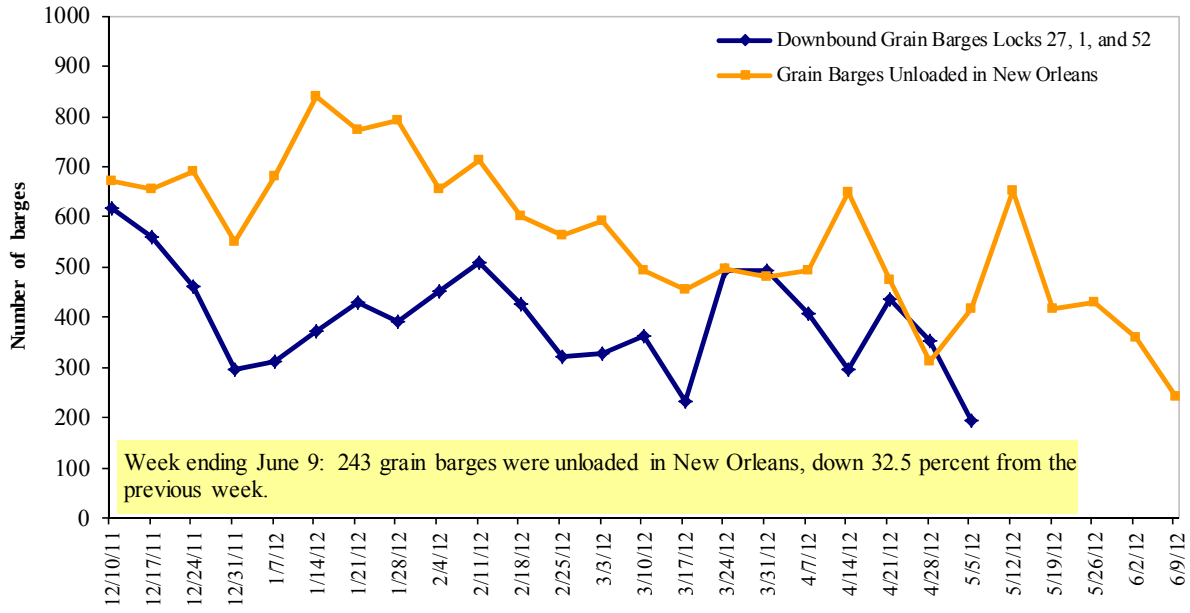
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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

***Current downbound grain barge data temporarily not available.**

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 6/11/2012 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.818	-0.068	-0.150
	New England	3.974	-0.062	-0.113
	Central Atlantic	3.909	-0.059	-0.179
	Lower Atlantic	3.721	-0.076	-0.184
II	Midwest[2]	3.696	-0.050	-0.209
III	Gulf Coast[3]	3.698	-0.059	-0.198
IV	Rocky Mountain	3.873	-0.046	-0.115
V	West Coast	3.991	-0.110	-0.172
	California	4.066	-0.103	-0.179
Total	U.S.	3.781	-0.065	-0.173

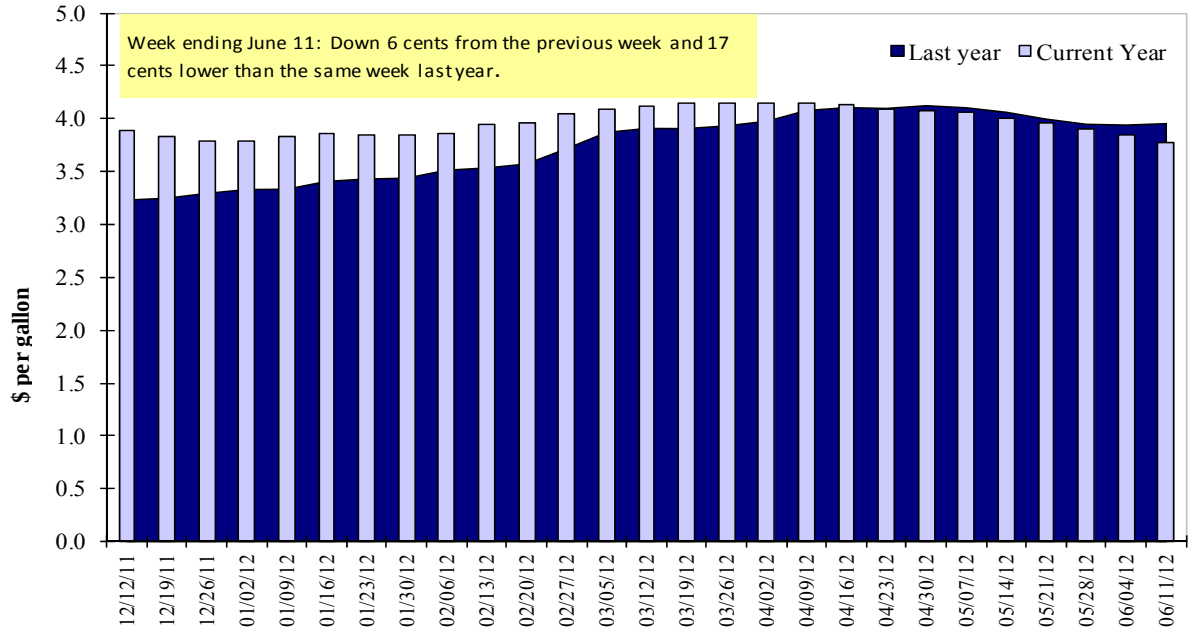
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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]									
5/31/2012	396	130	466	297	8	1,296	7,723	5,223	14,242
This week year ago	831	101	448	430	6	1,816	9,931	4,187	15,934
Cumulative exports-marketing year[2]									
2011/12 YTD	9,904	4,319	6,312	5,601	491	26,627	30,741	31,139	88,507
2010/11 YTD	15,974	2,866	8,814	4,804	981	33,439	33,871	37,491	104,801
YTD 2011/12 as % of 2010/11	62	151	72	117	50	80	91	83	84
Last 4 wks as % of same period 2010/11	47	71	72	45	15	1,452	82	220	123
2010/11 Total	15,837	2,828	8,623	4,717	979	32,984	44,569	39,753	117,306
2009/10 Total	8,458	2,733	5,329	3,897	983	21,400	47,700	39,285	108,385

[1] Current unshipped export sales to date

[2] Shipped export sales to date; the new marketing year is now 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 05/31/12	Total Commitments[2]			% change current MY from last MY	Exports[3]
	2012/13 Next MY	2011/12 Current MY	2010/11 Last MY		2010/11
		- 1,000 mt -			- 1,000 mt -
Japan	962	10,992	13,544	(19)	14,279
Mexico	711	9,428	6,613	43	7,019
Korea	181	3,790	5,373	(29)	6,104
China*	1,028	4,951	490	911	978
Taiwan	0	1,510	2,423	(38)	2,393
Top 5 importers	**2,882**	**30,670**	**28,442**	**8**	**30,772**
Total US corn export sales	**5,522**	**38,463**	**43,802**	**(12)**	**46,600**
% of Projected	11%	92%	94%		
Change from Last Week	147	252	320		
Top 5 importers' share of U.S. corn export sales	52%	80%	65%		
USDA forecast, June 2012	**48,260**	**41,910**	**46,600**	**(10)**	
Corn Use for Ethanol USDA forecast, Ethanol June 2012	**127,000**	**128,270**	**127,534**	**0.6**	

(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.

*China -- New to the Top 5 in the 2011/12 Marketing Year, replacing Egypt.

Table 14

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

Week Ending 05/31/2012	Total Commitments[2]			% change current MY from last MY	Exports[3]
	2012/13 Next MY	2011/12 Current MY	2010/11 Last MY		2010/11
		- 1,000 mt -			- 1,000 mt -
China	8,439	22,649	25,604	(12)	24,445
Mexico	134	3,029	3,013	1	3,215
Japan	123	1,709	2,072	(17)	1,887
EU	60	1,092	2,599	(58)	2,607
Indonesia	64	1,471	1,448	2	1,397
Top 5 importers	**8,818**	**29,950**	**34,735**	**(14)**	**33,551**
Total US soybean export sales	**10,975**	**36,361**	**41,678**	**(13)**	**40,860**
% of Projected	27%	100%	102%		
Change from last week	275	220	121		
Top 5 importers' share of U.S. soybean export sales	80%	82%	83%		
USDA forecast, June 2012	**40,420**	**36,330**	**40,860**	**(11)**	

(n) indicates negative number.

[1]Based on FAS 2008/09 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.

Table 15

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

Week Ending 05/31/2012	Total Commitments[2]			% change current MY from last MY	Exports[3]
	2012/13 Next MY	2011/12 Current MY	2010/11 Last MY		2010/11
		- 1,000 mt -			- 1,000 mt -
Nigeria	271	3,352	3,864	(13)	3,233
Japan	538	3,845	3,533	9	3,148
Mexico	808	3,563	2,667	34	2,601
Philippines	413	2,089	1,871	12	1,518
Korea	331	2,090	1,693	23	1,111
Peru	0	552	1,001	(45)	923
Taiwan	187	975	953	2	913
Colombia	116	456	800	(43)	783
Indonesia	4	830	843	(2)	781
Yemen	0	418	872	(52)	659
Top 10 importers	**2,668**	**18,170**	**18,097**	**0.4**	**15,670**
Total US wheat export sales[4]	**5,115**	**27,923**	**35,254**	**(21)**	**35,080**
% of Projected	16%	97%	100%		
Change from last week	2,541	30	-50		
Top 10 importers' share of U.S. wheat export sales	52%	65%	51%		
USDA forecast, June 2012	**31,300**	**28,710**	**35,080**	**(18)**	

(n) indicates negative number.

[1] Modified from the FAS **2010/11** 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.

[4] The end of year outstanding sales have been carried forward and are included in the next marketing year outstanding sales and

Table 16

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

Port regions	Week ending 06/07/12	Previous Week[1]	Current Week as % of Previous	2012 YTD[1]	2011 YTD[1]	2012 YTD as % of 2011 YTD	Last 4-weeks as % of 2011	Last 4-weeks as % of 3-yr. avg.	Total[1] 2011
Pacific Northwest									
Wheat	229	173	132	6,182	6,673	93	76	98	13,995
Corn	64	263	24	3,221	4,211	76	65	76	9,198
Soybeans	195	63	308	4,642	3,161	147	392	600	7,321
Total	**488**	**500**	**98**	**14,045**	**14,044**	**100**	**92**	**115**	**30,513**
Mississippi Gulf									
Wheat	100	132	76	3,011	2,453	123	245	201	5,031
Corn	249	338	74	9,596	11,765	82	70	60	26,267
Soybeans	112	281	40	8,967	9,476	95	141	100	19,262
Total	**461**	**751**	**61**	**21,573**	**23,695**	**91**	**96**	**80**	**50,560**
Texas Gulf									
Wheat	225	150	150	2,458	6,724	37	60	94	10,837
Corn	0	0	n/a	287	678	42	5	10	1,021
Soybeans	0	0	n/a	0	763	0	n/a	0	926
Total	**225**	**150**	**150**	**2,745**	**8,165**	**34**	**53**	**85**	**12,784**
Interior									
Wheat	32	23	140	557	504	111	109	181	1,110
Corn	120	88	136	3,833	3,167	121	85	112	7,509
Soybeans	52	93	56	1,987	1,886	105	69	131	4,273
Total	**205**	**204**	**100**	**6,377**	**5,557**	**115**	**166**	**123**	**12,892**
Great Lakes									
Wheat	0	58	0	111	533	21	44	97	1,038
Corn	0	7	0	37	8	445	89	44	178
Soybeans	24	19	127	83	22	375	189	308	382
Total	**24**	**84**	**28**	**232**	**564**	**41**	**63**	**116**	**1,598**
Atlantic									
Wheat	0	53	0	169	520	32	168	291	686
Corn	0	0	n/a	80	162	50	27	34	295
Soybeans	5	10	50	482	417	116	110	126	1,042
Total	**5**	**63**	**8**	**731**	**1,100**	**66**	**109**	**158**	**2,022**
U.S. total from ports[2]									
Wheat	586	589	99	12,488	17,408	72	85	114	32,697
Corn	433	697	62	17,054	19,992	85	69	69	44,466
Soybeans	387	465	83	16,162	15,725	103	174	162	33,205
Total	**1,407**	**1,752**	**80**	**45,704**	**53,125**	**86**	**88**	**96**	**110,369**

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

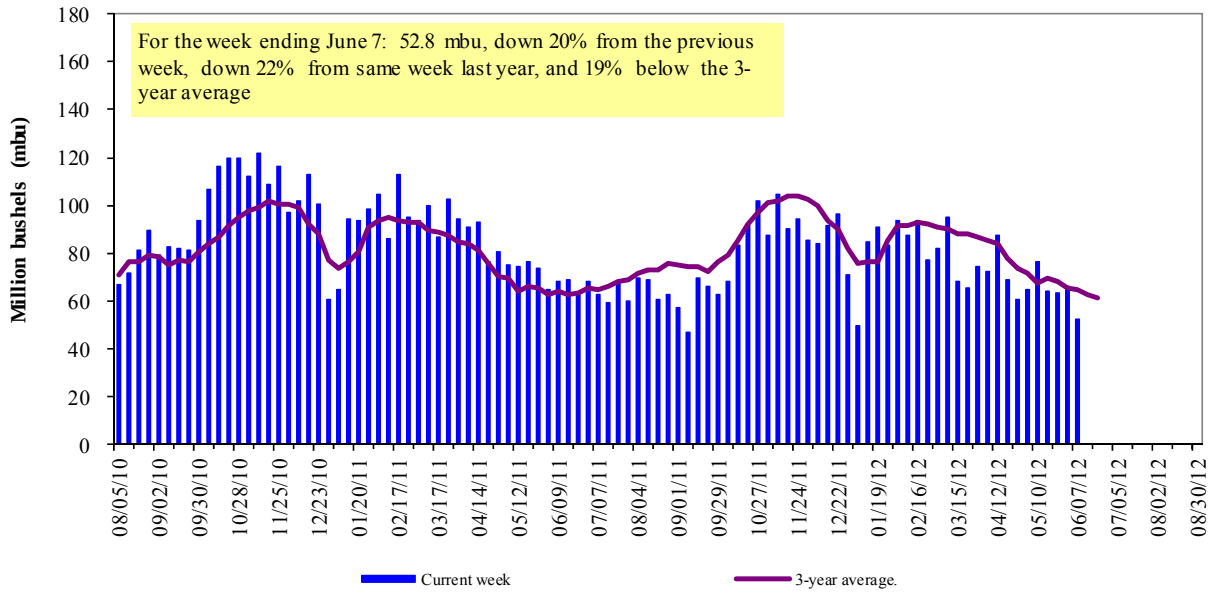
[2] Total includes only port regions shown above; Interior land-based shipments now included.

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 59 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2011.

Figure 14

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

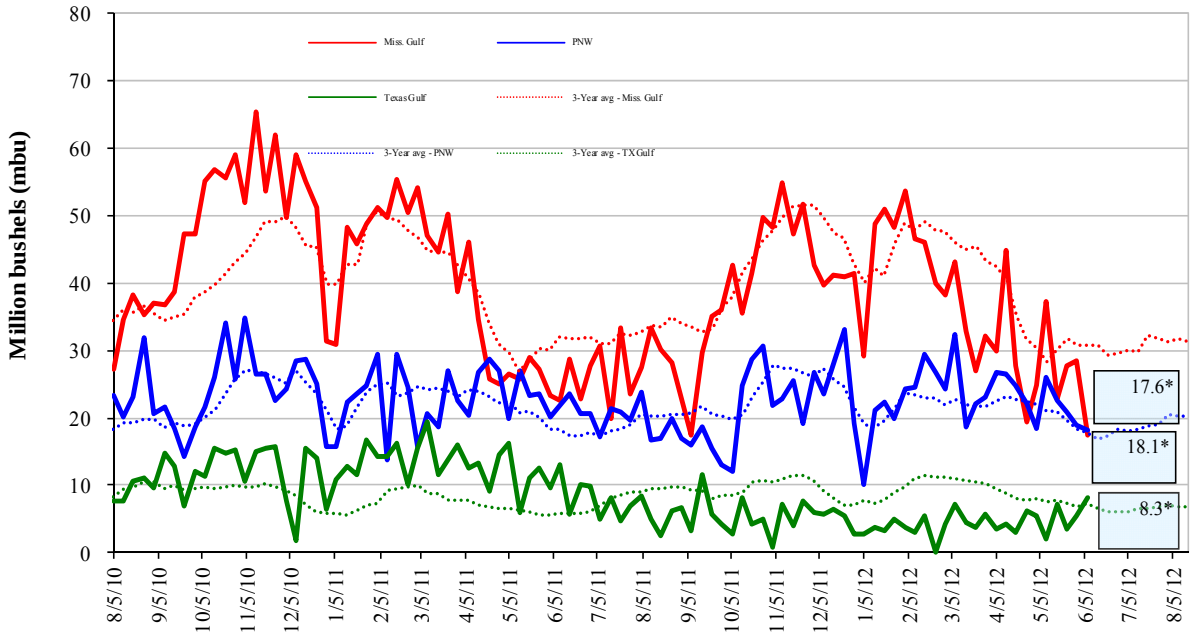


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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 7 % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 38	up 50	down 24	down 23
Last year (same week)	down 22	down 36	down 27	down 23
3-yr avg. (4-wk mov. avg.)	down 43	up 14	down 32	down 22

Table 17

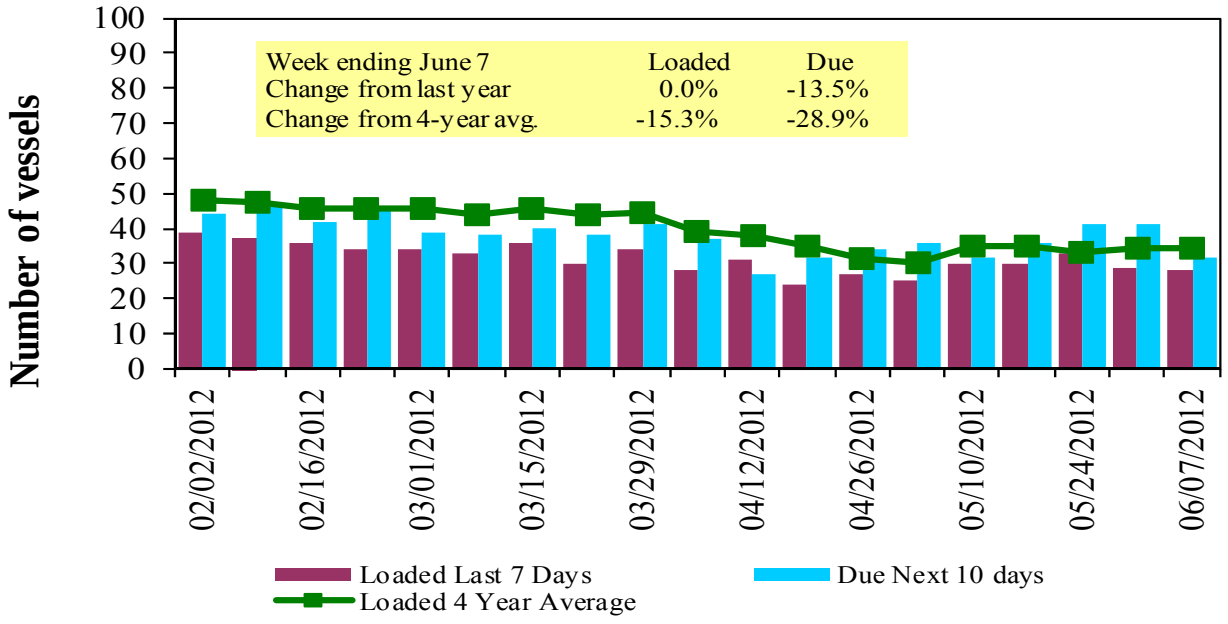
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
6/7/2012	17	28	32	9	n/a
5/31/2012	16	29	41	7	n/a
2011 range	(14..65)	(28..54)	(34..83)	(5..25)	(1..20)
2011 avg.	31	38	53	15	12

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

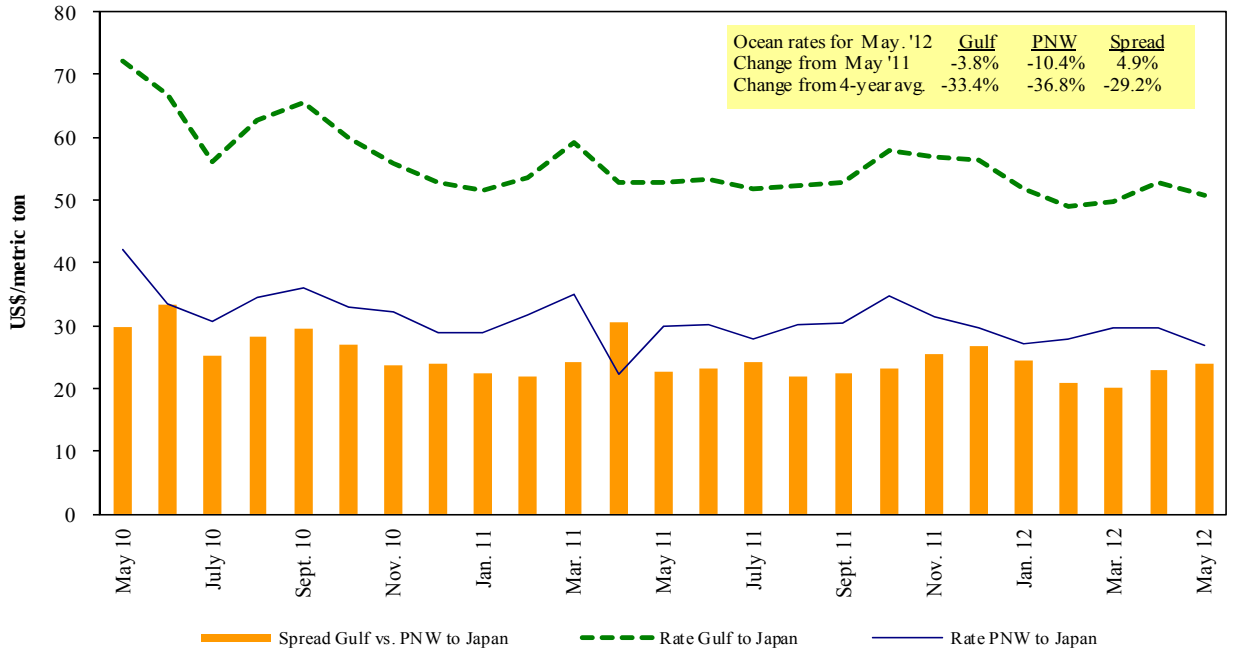
U.S. Gulf[1] Vessel Loading Activity



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 06/09/2012

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Mar 1/10	50,000	46.65
U.S. Gulf	Korea	Heavy Grain	Mar 1/10	55,000	46.00
U.S. Gulf	Japan	Heavy Grain	Apr 1/10	58,000	46.00
PNW	Djibouti[1]	Wheat	May 5/15	26,430	118.03
PNW	China	Grain	Jan 10/20	55,000	26.75
St. Lawrence	Nigeria	Wheat	Apr 5/15	25,000	45.00
Argentina	Morocco	Barley	Apr 1/10	25,000	39.75
Australia	Vietnam	Grain	Mar 1/10	60,000	19.00
Brazil	Tunisia	Wheat	Feb 14/16	23,750	38.50
Brazil	Taiwan	Heavy Grain	Feb 1/10	65,000	29.50
Brazil	China	Heavy Grain	May 20/30	60,000	47.75
Brazil	China	Heavy Grain	May 1/30	66,000	40.50
Brazil	China	Heavy Grain	Apr 1/10	60,000	47.75
Brazil	China	Heavy Grain	Mar 5/15	60,000	43.00
Brazil	China	Grain	Mar 1/10	55,000	47.00
River Plate	China	Heavy Grain	Feb 20/25	60,000	45.00
River Plate	Egypt Med	Corn	Feb 25/ Mar 5	30,000	39.25
River Plate	Morocco	Corn	Mar 25/30	25,000	35.00
Ukraine	Japan	Corn	Apr 6/15	47,000	47.50

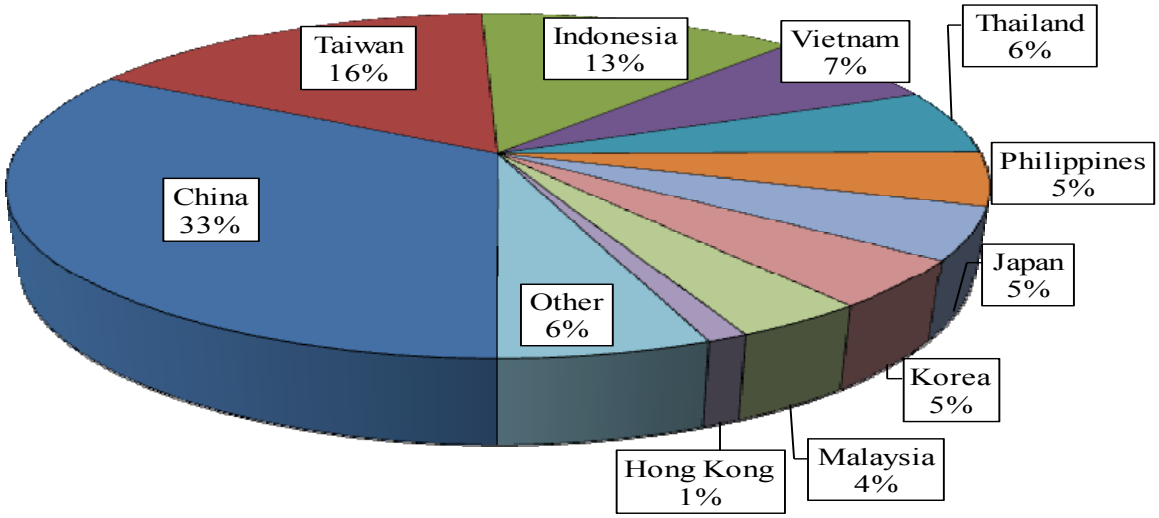
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

[1] 75 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 2011, containers were used to transport 7 percent of total U.S. waterborne grain exports, up 2 percentage points from 2010. Approximately 11 percent of U.S. waterborne grain exports in 2011 went to Asia, up 4 percentage points from 2010. Asia is the top destination for U.S. containerized grain exports—96 percent in 2011.

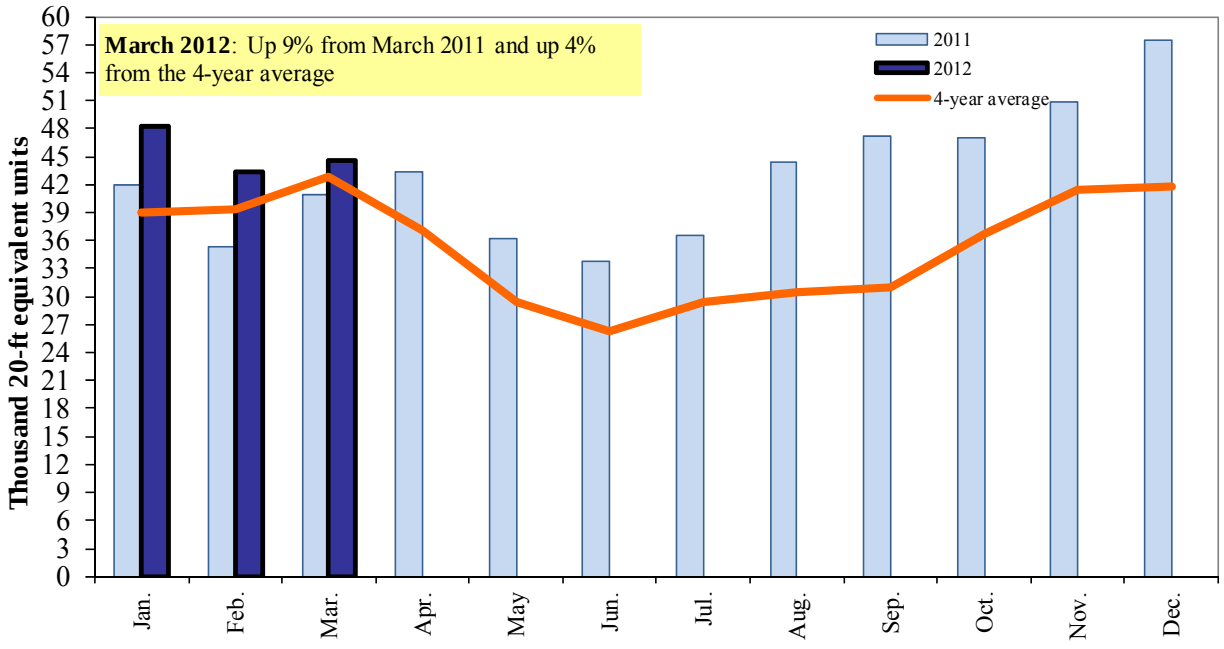
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, March 2012



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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