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

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Contents

The next release is Dec. 5, 2013

WEEKLY HIGHLIGHTS

Corps Begins Reduction in Missouri River Releases

On November 23, the U.S. Army Corps of Engineers began the annual reduction of water releases on the Missouri River that will close navigation on the Missouri River by December 1 at St. Louis, where the Missouri flows into the Mississippi River. Typically, navigation is possible on the Missouri River from April to December by controlled releases of water from the upstream reservoirs. The lower water releases are forecasted to impact Mississippi River levels around December 2 or 3. Although current Mississippi River levels are lower than average, improved drought conditions and additional precipitation could help avoid any potential navigation issues while Missouri River flows are reduced.

Grain Inspections Recede but Remain Above 3-Year Average

For the week ending November 21, **total inspections of grain** (corn, wheat, and soybeans) for export from all major port regions reached 2.89 million metric tons (mmt), down 21 percent from the previous week, up 48 percent from last year, and 11 percent above the 3-year average. During the last 4 weeks, total grain inspections were 42 percent above the same time last year and 22 percent above the 3-year average. Wheat inspections (.343 mmt) dropped 30 percent from the past week as shipments to Asia and Latin America receded, and soybean inspections (1.77 mmt) decreased 25 percent as shipments to Asia fell. Corn (.769 mmt) remained unchanged from the previous week. Inspections decreased 5 percent in the Pacific Northwest and dropped 23 percent in the Mississippi Gulf. Outstanding (unshipped) sales are up for wheat and corn but down slightly for soybeans.

Graincar Loadings Recover with Noticeable Shifts in Traffic Patterns

U.S. railroads originated 24,104 **carloads of grain** during the week ending November 16, up 2 percent from last week, 24 percent from last year, and 7 percent from the 3-year average. This was the second time in the past four weeks that weekly graincar loadings exceeded 24,000 carloads. Graincar loadings have not been above this mark since the 2010/11 harvest season. Traditionally, the two Western railroads carry a majority of the grain traffic. However, they are carrying a noticeably smaller percentage this year. A comparison of the past 4 weeks with the same period in 2010 shows that BNSF and Union Pacific loaded 20 and 13 percent less grain while CSX, Norfolk Southern, and Kansas City Southern loaded 18, 21, and 66 percent more grain.

Snapshots by Sector

Rail

During the week ending November 21, average December non-shuttle **secondary railcar bids/offers per car** were $175 above tariff, down $125 from last week and $187.50 higher than last year. Average shuttle bids/offers were $535.50 above tariff, up $439.50 from last week and $677.50 higher than last year.

Barge

During the week ending November 23, **barge grain movements** totaled 876,948 tons the highest weekly volume so far this year—1.6 percent higher than the previous week and 15.2 percent higher than the same period last year.

During the week ending November 23, 603 grain barges **moved down river**, up 9.8 percent from last week; 907 grain barges were **unloaded in New Orleans**, down 4.2 percent from the previous week.

Ocean

During the week ending November 21, 49 **ocean-going grain vessels** were loaded in the Gulf, 36 percent more than the same period last year. Sixty-seven vessels are expected to be loaded within the next 10 days, 22 percent more than the same period last year.

During the week ending November 12, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $53 per mt, unchanged from the previous week. The cost of shipping from the Pacific Northwest to Japan was $28 per mt, unchanged from the previous week.

Fuel

During the week ending November 25, U.S. average **diesel fuel prices** increased 2 cents from the previous week to $3.84 per gallon—19 cents lower than the same week last year.

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Feature Article/Calendar

Grain Shipment Costs to Mexico Mixed as Farm Prices Fell

The transportation costs of shipping grain to Mexico were mixed during the third quarter as farm prices fell across all grain types. The cost of shipping corn and soybeans by water to Veracruz, Mexico, increased 19 percent quarter-to-quarter, and the cost of shipping wheat decreased 13 percent (see table). In contrast, the cost of shipping corn and soybeans by land to Guadalajara, Mexico, remained unchanged, while costs to transport wheat increased 6 percent during the quarter.

Quarterly costs of transporting U.S. grain to Mexico

	Water route (to Veracruz)					Land route (to Guadalajara)				
	$/metric ton					$/metric ton				
	2012 3rd qtr.	2013 2nd qtr.	2013 3rd qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2012 3rd qtr.	2013 2nd qtr.	2013 3rd qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.
Corn										
Origin			IL					IA		
Truck	13.51	9.46	13.38	-1.0	41.4	7.46	3.76	4.46	-40.2	18.6
Rail [1]						86.22	87.50	86.52	0.3	-1.1
Ocean [2]	18.53	17.58	17.85	-3.7	1.5					
Barge	21.69	14.83	18.77	-13.5	26.6					
Total transportation cost	53.73	41.87	50.00	-6.9	19.4	93.68	91.26	90.98	-2.9	-0.3
Farm Value	285.55	272.43	237.13	-17.0	-13.0	287.39	278.86	247.89	-13.7	-11.1
Landed Cost	339.28	314.30	287.13	-15.4	-8.6	381.07	370.12	338.87	-11.1	-8.4
Transport % of landed cost	16	13	17			25	25	27		
Soybeans										
Origin			IL					NE		
Truck	13.51	9.46	13.38	-1.0	41.4	7.46	3.76	4.46	-40.2	18.6
Rail [1]						88.05	91.64	90.69	3.0	-1.0
Ocean [2]	18.53	17.58	17.85	-3.7	1.5					
Barge	21.69	14.83	18.77	-13.5	26.6					
Total transportation cost	53.73	41.87	50.00	-6.9	19.4	95.51	95.40	95.15	-0.4	-0.3
Farm Value	557.28	553.61	529.11	-5.1	-4.4	558.50	536.46	509.51	-8.8	-5.0
Landed Cost	611.01	595.48	579.11	-5.2	-2.7	654.01	631.86	604.66	-7.5	-4.3
Transport % of landed cost	9	7	9			15	15	16		
Wheat										
Origin			KS					KS		
Truck*	29.38	35.77	22.50	-23.4	-37.1	7.46	3.76	4.46	-40.2	18.6
Rail [1]						82.49	86.47	91.42	10.8	5.7
Ocean [2]	18.53	17.58	17.85	-3.7	1.5					
Barge	18.69	9.84	14.47	-22.6	47.1					
Total transportation cost	66.60	63.19	54.82	-17.7	-13.2	89.95	90.23	95.88	6.6	6.3
Farm Value	303.63	269.33	255.61	-15.8	-5.1	303.63	269.33	255.61	-15.8	-5.1
Landed Cost	370.23	332.52	310.43	-16.2	-6.6	393.58	359.56	351.49	-10.7	-2.2
Transport % of landed cost	18	19	18			23	25	27		

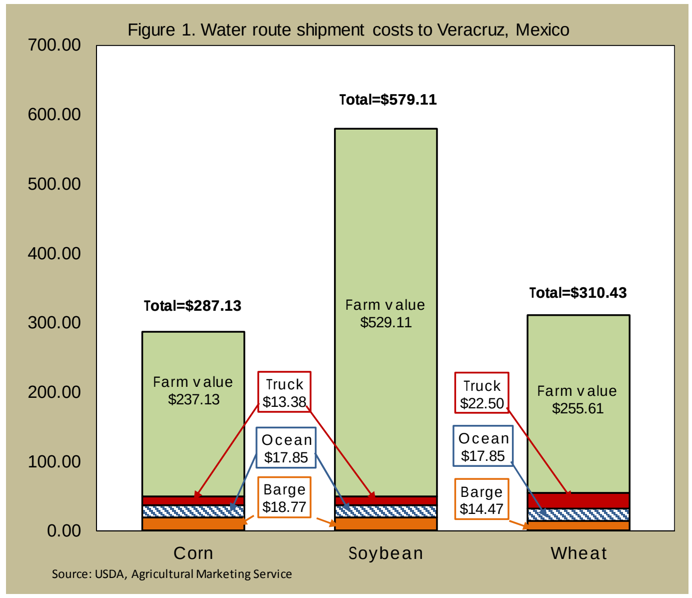
[1]Rail rates include U.S. and Mexico portions of the movement. Mexico rail rates are estimated based on actual quoted market rates. BNSF and Union Pacific quoted rail tariff rates are through rates for shuttle trains. Rail rates include fuel surcharges. Origins are modified from past tables. Rail rates for water route were revised from previous estimates

[2]Source: O'Neil Commodity Consulting

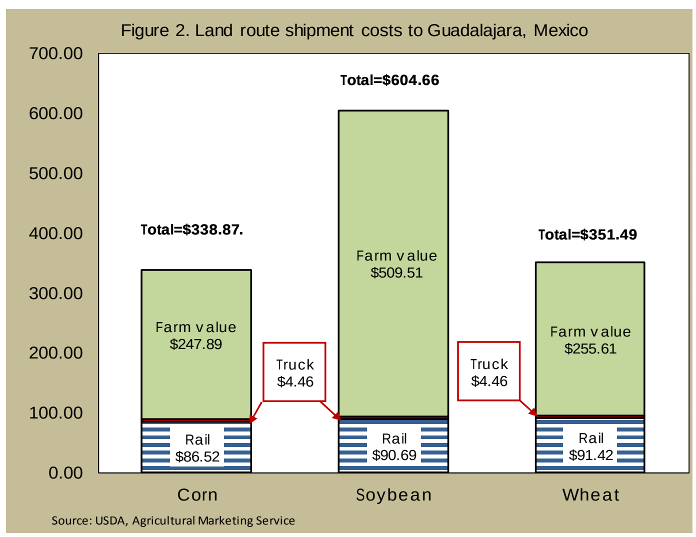
*Truck rates for land route were revised from the previous estimates

Costs for shipping corn and soybeans by water rose due to increases in truck, barge, and ocean rates. The increases in truck and barge rates, especially in the Corn Belt regions, are partially due to higher seasonal demand for trucking and barging services during the harvest season. In addition, diesel prices were slightly higher during the quarter. The increase in bulk ocean freight rates was driven by a global increase in bulk shipments of commodities such as iron ore, coal, and grain (see *GTR, dated 11/07/13*). The large drop in truck rates, corresponding with reduced demand for moving wheat by truck, more than offset increases in ocean and barge rates, resulting in the overall transportation cost of waterborne wheat to drop by 13 percent during the quarter. However, increased rail rates for Kansas wheat pushed up the cost of shipping by the land route.

Quarter-to-quarter and year-to-year farm prices fell for corn, soybeans, and wheat. Corn prices fell 11 percent from the previous quarter and 14 percent from a year ago. The price of soybeans was down 5 and 9 percent from the previous quarter and from a year earlier. Wheat prices fell 5 and 16 percent below the previous quarter and a year earlier. Lower grain prices led to a higher share of the landed costs for transportation. Transportation's share of the landed cost ranged from 9–18 percent for the water route and 16–27 percent for the land route. Total landed costs for the water route ranged from \$287.13– \$579.11 and \$338.87– \$604.66 for the land route (figures 1 and 2).



Market Outlook: From January to August, Mexico imported 3.09 million metric tons (mmt) of corn, 1.59 mmt of soybeans, and 2.06 mmt of wheat from the United States. The value of the corn was \$9.42 billion, soybeans was \$1.59 billion, and wheat was \$6.53 billion. Although the amount of grain imported was less than the same period last year, it is very likely that imports will increase for marketing year (MY) 2013/14 due to contraction in Mexico's corn and wheat production caused by tropical storms and adverse weather conditions (FAS, [GAIN Report #: MX3078]). USDA's Foreign Agricultural Service has revised upward its estimate from the official USDA estimate of Mexico's MY 2013/14 corn imports to 8.0 mmt and wheat imports to 3.9 mmt (FAS, [GAIN Report #: MX3078]). Almost all of these imports are expected to come from the United States.



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Grain Transportation Indicators

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
Week ending		Unit Train	Shuttle		Gulf	Pacific
11/27/13	258	249	238	294	237	199
11/20/13	257	263	236	361	237	199

[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	11/22/2013	11/15/2013
Corn	IL--Gulf	-0.95	-1.01
Corn	NE--Gulf	-1.02	-1.00
Soybean	IA--Gulf	-1.33	-1.36
HRW	KS--Gulf	-1.47	-1.62
HRS	ND--Portland	-2.30	-2.33

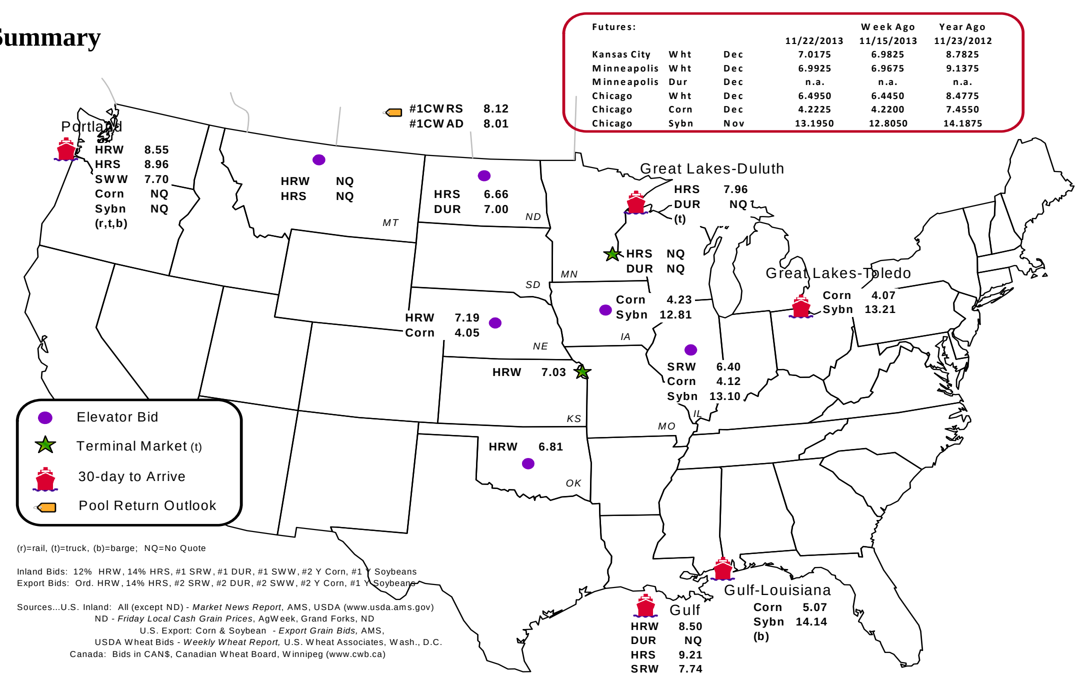
Note: nq = no quote

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]
11/20/2013[p]	2,314	954	7,168	1,278	11,714	11/16/13	2,345
11/13/2013[r]	1,949	1,060	7,558	1,209	11,776	11/09/13	2,095
2013 YTD[r]	23,706	65,550	141,805	19,600	250,661	2013 YTD	62,080
2012 YTD[r]	16,051	37,003	180,887	19,955	253,896	2012 YTD	86,282
2013 YTD as % of 2012 YTD	148	177	78	98	99	% change YTD	72
Last 4 weeks as % of 2012[2]	267	137	170	120	169	Last 4wks % 2012	126
Last 4 weeks as % of 4-year avg.[2]	179	63	165	128	142	Last 4wks % 4 yr	115
Total 2012	22,604	40,780	199,419	44,259	287,462	Total 2012	92,008
Total 2011	27,358	77,515	191,187	24,088	320,148	Total 2011	97,118

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2012 and prior 4-year average.

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

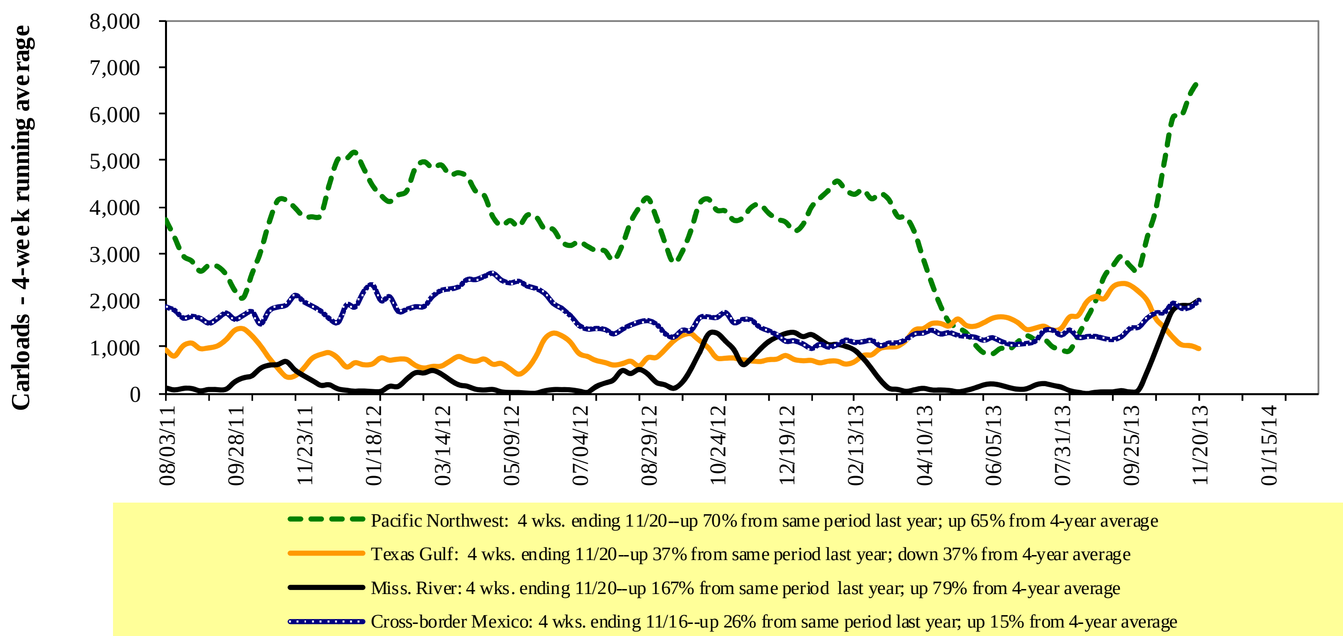
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

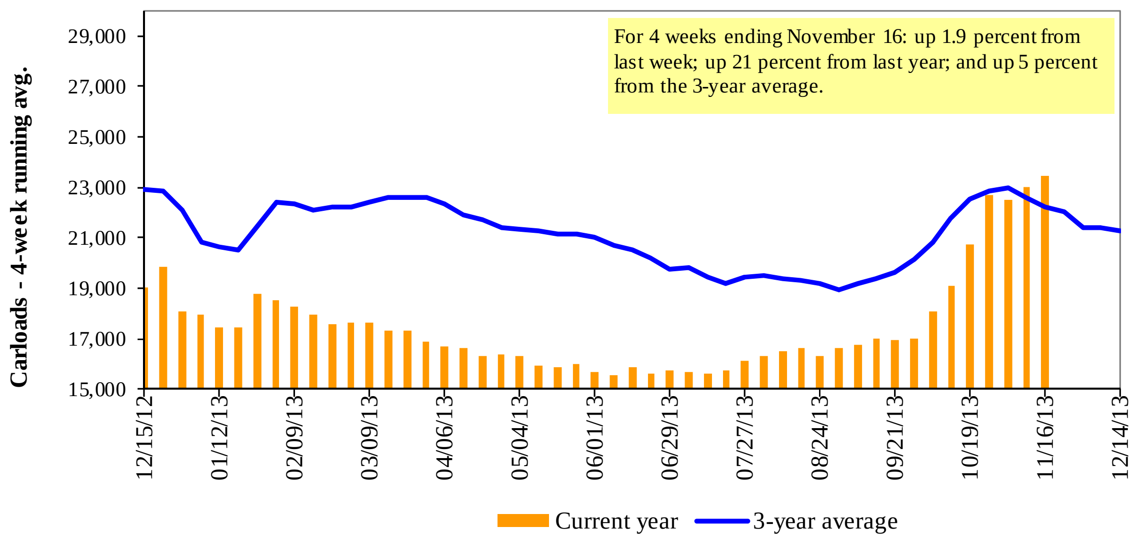
	East		West			U.S. total	Canada	
Week ending	**CSXT**	**NS**	**BNSF**	**KCS**	**UP**		**CN**	**CP**
11/16/13	2,826	4,073	9,642	1,140	6,423	24,104	5,396	6,021
This week last year	1,775	2,757	10,872	643	3,345	19,392	4,465	6,669
2013 YTD	72,401	118,193	402,616	29,673	188,854	811,737	164,308	241,996
2012 YTD	76,077	128,757	457,970	23,919	221,208	907,931	180,161	230,639
2013 YTD as % of 2012 YTD	95	92	88	124	85	89	91	105
Last 4 weeks as % of 2012	161	132	92	197	165	121	120	96
Last 4 weeks as % of 3-yr avg.[1]	128	128	86	175	113	105	125	103
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							
11/21/2013	**Dec-13**	**Dec-12**	**Jan-14**	**Jan-13**	**Feb-14**	**Feb-13**	**Mar-14**	**Mar-13**
BNSF[3]								
COT grain units	no offer	0	no offer	0	no offer	0	153	no bids
COT grain single-car[5]	no offer	0	no offer	10	no offer	no bids	0 . . 104	no bids
UP[4]								
GCAS/Region 1	1	no bids	no bids	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	1	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.

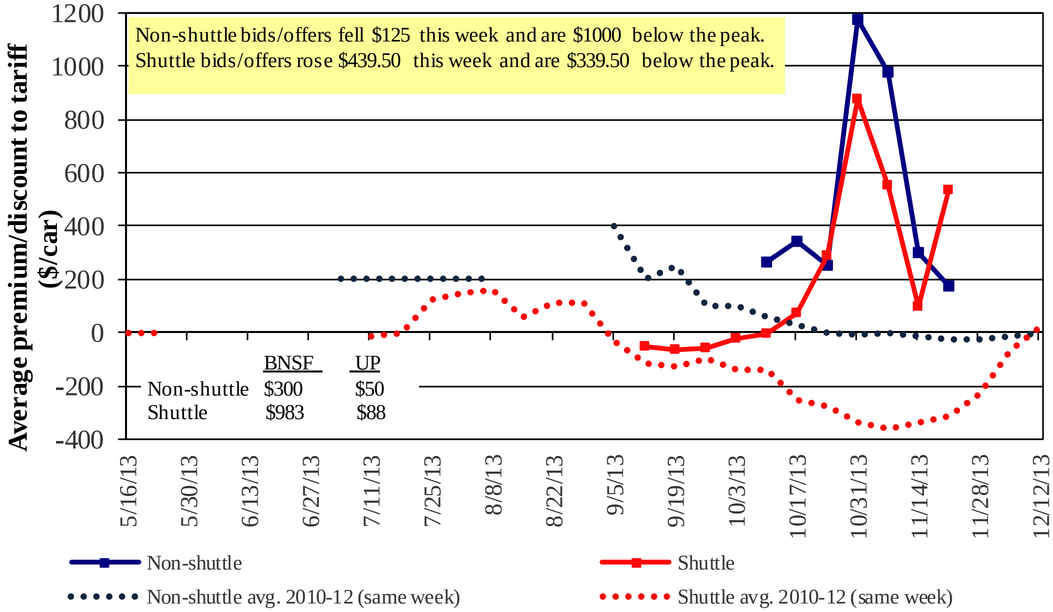
[5]Range is shown because average is not available. Not available = n/a.

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 December 2013, Secondary Market

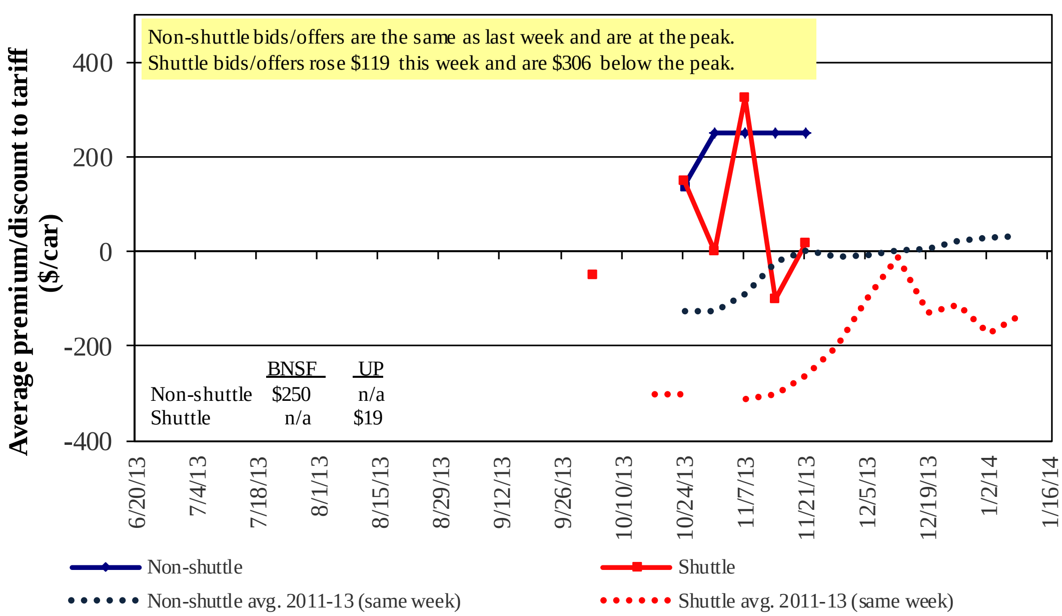


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

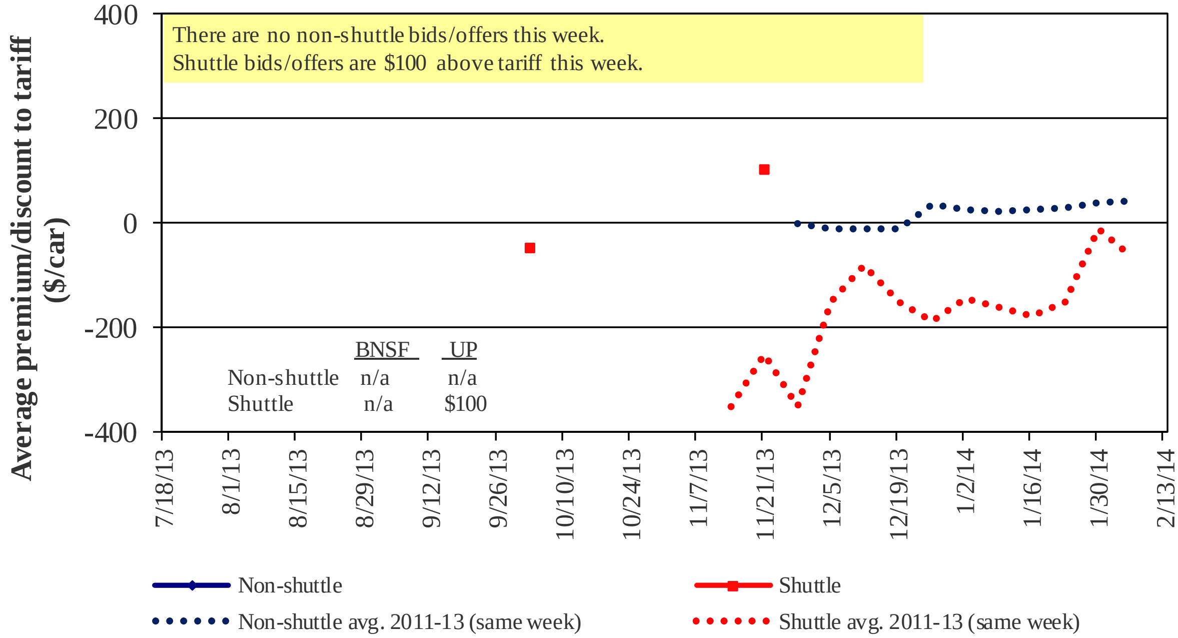


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

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



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 6

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

Week ending	Delivery period					
11/21/2013	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14
Non-shuttle						
BNSF-GF	300	250	n/a	n/a	n/a	n/a
Change from last week	-	-	n/a	n/a	n/a	n/a
Change from same week 2012	325	n/a	n/a	n/a	n/a	n/a
UP-Pool	50	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	50	n/a	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	983	n/a	n/a	n/a	n/a	n/a
Change from last week	666	n/a	n/a	n/a	n/a	n/a
Change from same week 2012	1,171	n/a	n/a	n/a	n/a	n/a
UP-Pool	88	19	100	-	(100)	(100)
Change from last week	213	119	n/a	n/a	n/a	n/a
Change from same week 2012	184	219	n/a	n/a	n/a	n/a

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

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

Table 7

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

Effective date: 11/1/2013	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	$192	$33.60	$0.91	1
	Grand Forks, ND	Duluth-Superior, MN	$3,596	$110	$36.80	$1.00	4
	Wichita, KS	Los Angeles, CA	$6,244	$566	$67.63	$1.84	2
	Wichita, KS	New Orleans, LA	$3,808	$338	$41.17	$1.12	3
	Sioux Falls, SD	Galveston-Houston, TX	$5,824	$465	$62.45	$1.70	3
	Northwest KS	Galveston-Houston, TX	$4,076	$371	$44.16	$1.20	3
	Amarillo, TX	Los Angeles, CA	$4,275	$516	$47.57	$1.29	3
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,192	$382	$35.49	$0.90	1
	Toledo, OH	Raleigh, NC	$4,686	$433	$50.83	$1.29	3
	Des Moines, IA	Davenport, IA	$2,078	$81	$21.44	$0.54	3
	Indianapolis, IN	Atlanta, GA	$4,061	$325	$43.56	$1.11	3
	Indianapolis, IN	Knoxville, TN	$3,469	$209	$36.52	$0.93	3
	Des Moines, IA	Little Rock, AR	$3,218	$238	$34.32	$0.87	1
	Des Moines, IA	Los Angeles, CA	$5,215	$693	$58.67	$1.49	2
Soybeans	Minneapolis, MN	New Orleans, LA	$3,459	$417	$38.49	$1.05	1
	Toledo, OH	Huntsville, AL	$3,687	$308	$39.67	$1.08	2
	Indianapolis, IN	Raleigh, NC	$4,756	$436	$51.56	$1.40	3
	Indianapolis, IN	Huntsville, AL	$3,379	$209	$35.63	$0.97	3
	Champaign-Urbana, IL	New Orleans, LA	$3,748	$382	$41.02	$1.12	3
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,678	$326	$39.76	$1.08	4
	Wichita, KS	Galveston-Houston, TX	$3,798	$253	$40.23	$1.09	3
	Chicago, IL	Albany, NY	$3,950	$406	$43.26	$1.18	3
	Grand Forks, ND	Portland, OR	$5,159	$562	$56.82	$1.55	2
	Grand Forks, ND	Galveston-Houston, TX	$6,084	$586	$66.23	$1.80	1
	Northwest KS	Portland, OR	$5,043	$608	$56.11	$1.53	4
Corn	Minneapolis, MN	Portland, OR	$5,000	$685	$56.45	$1.43	2
	Sioux Falls, SD	Tacoma, WA	$4,960	$627	$55.48	$1.41	2
	Champaign-Urbana, IL	New Orleans, LA	$3,011	$382	$33.70	$0.86	4
	Lincoln, NE	Galveston-Houston, TX	$3,510	$366	$38.49	$0.98	4
	Des Moines, IA	Amarillo, TX	$3,590	$299	$38.62	$0.98	4
	Minneapolis, MN	Tacoma, WA	$5,000	$679	$56.40	$1.43	2
	Council Bluffs, IA	Stockton, CA	$4,400	$703	$50.67	$1.29	2
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,520	$627	$61.04	$1.66	2
	Minneapolis, MN	Portland, OR	$5,530	$685	$61.72	$1.68	2
	Fargo, ND	Tacoma, WA	$5,430	$558	$59.46	$1.62	2
	Council Bluffs, IA	New Orleans, LA	$4,175	$441	$45.84	$1.25	6
	Toledo, OH	Huntsville, AL	$2,862	$308	$31.47	$0.86	3
	Grand Island, NE	Portland, OR	$5,110	$622	$56.92	$1.55	2

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

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

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

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

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

Table 8

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

Effective date: 11/1/2013				Fuel			Percent
	Origin		Tariff	surcharge	Tariff plus surcharge per:		change
Commodity	state	Destination region	rate/car[1]	per car[2]	metric ton[3]	bushel[3]	Y/Y[4]
Wheat	MT	Chihuahua, CI	$6,360	$595	$71.06	$1.93	-17
	OK	Cuautitlan, EM	$6,357	$723	$72.33	$1.97	-7
	KS	Guadalajara, JA	$8,293	$698	$91.87	$2.50	9
	TX	Salinas Victoria, NL	$2,898	$272	$32.39	$0.88	-22
Corn	IA	Guadalajara, JA	$7,974	$821	$89.86	$2.28	2
	SD	Celaya, GJ	$7,656	$778	$86.18	$2.19	3
	NE	Queretaro, QA	$7,317	$729	$82.21	$2.09	1
	SD	Salinas Victoria, NL	$5,880	$592	$66.12	$1.68	2
	MO	Tlalnepantla, EM	$6,755	$709	$76.26	$1.94	1
	SD	Torreon, CU	$6,722	$652	$75.34	$1.91	2
Soybeans	MO	Bojay (Tula), HG	$7,868	$693	$87.46	$2.38	3
	NE	Guadalajara, JA	$8,447	$792	$94.40	$2.57	3
	IA	El Castillo, JA	$8,855	$774	$98.38	$2.67	2
	KS	Torreon, CU	$6,864	$491	$75.15	$2.04	2
Sorghum	TX	Guadalajara, JA	$6,764	$507	$74.29	$1.89	1
	NE	Celaya, GJ	$7,272	$707	$81.52	$2.07	3
	KS	Queretaro, QA	$7,005	$444	$76.11	$1.93	7
	NE	Salinas Victoria, NL	$5,628	$520	$62.81	$1.59	7
	NE	Torreon, CU	$6,328	$580	$70.59	$1.79	3

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

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

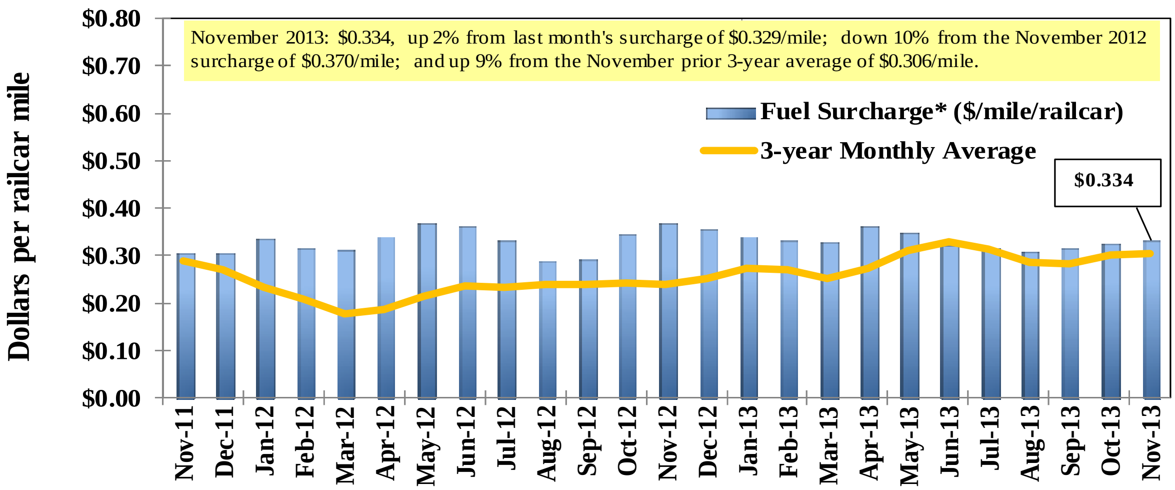
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average[1]



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

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

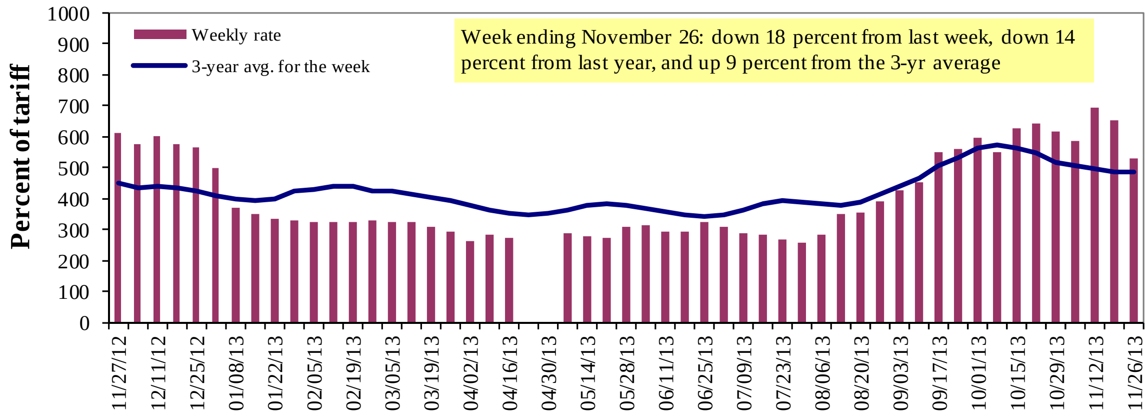
** BNSF strike price (diesel price when fuel surcharges begin) changed from $1.25/gal. to $2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was $0.227/mile instead of $0.331/mile.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate[1,2]



[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]	11/26/2013	500	543	530	460	538	538	363
	11/19/2013	520	545	650	617	700	700	558
$/ton	11/26/2013	30.95	28.89	24.59	18.35	25.23	21.74	11.40
	11/19/2013	32.19	28.99	30.16	24.62	32.83	28.28	17.52
Current week % change from the same week:								
	Last year	--	-8	-14	-10	6	6	4
	3-year avg. [2]	--	3	9	12	21	21	9
Rate[1]	December	--	--	524	423	491	491	346
	February	--	--	455	366	429	429	301

[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

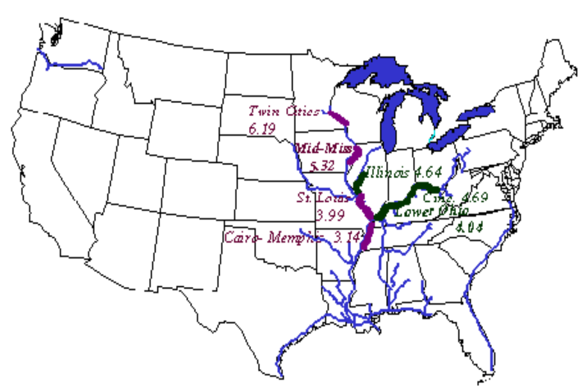
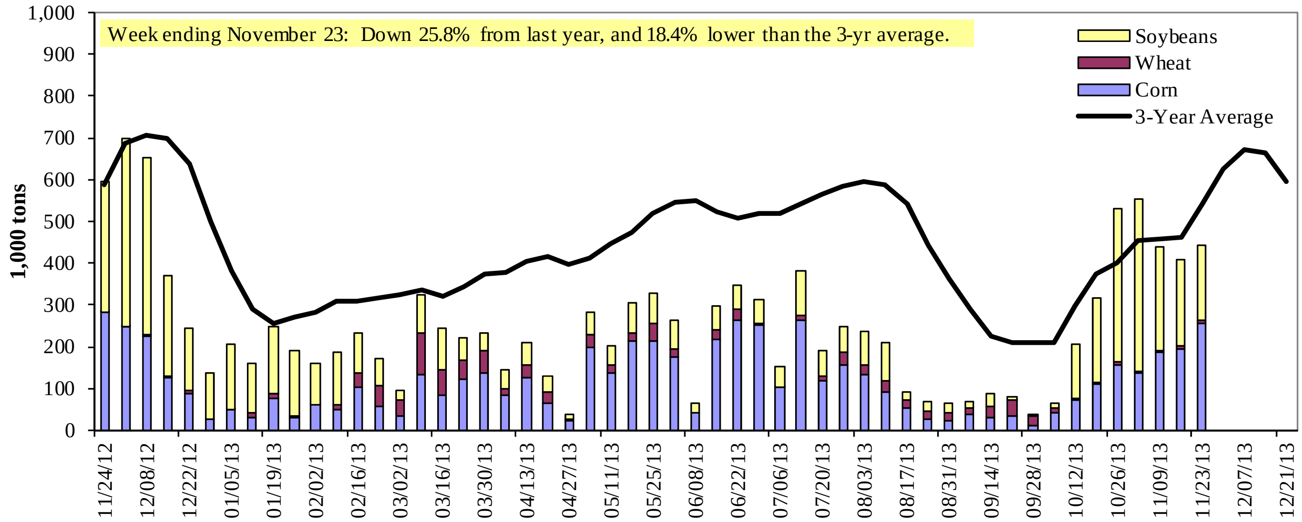


Figure 10

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 11/23/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	37	3	48	3	92
Winfield, MO (L25)	93	5	153	0	251
Alton, IL (L26)	262	5	174	0	441
Granite City, IL (L27)	257	5	179	0	441
Illinois River (L8)	105	9	39	0	153
Ohio River (L52)	129	0	241	5	375
Arkansas River (L1)	4	10	46	0	60
Weekly total - 2013	390	15	467	5	877
Weekly total - 2012	307	16	437	2	761
2013 YTD[1]	8,000	4,001	7,938	219	20,159
2012 YTD	13,864	1,700	10,715	226	26,505
2013 as % of 2012 YTD	58	235	74	97	76
Last 4 weeks as % of 2012[2]	128	150	112	313	119
Total 2012	14,837	1,794	12,663	229	29,523

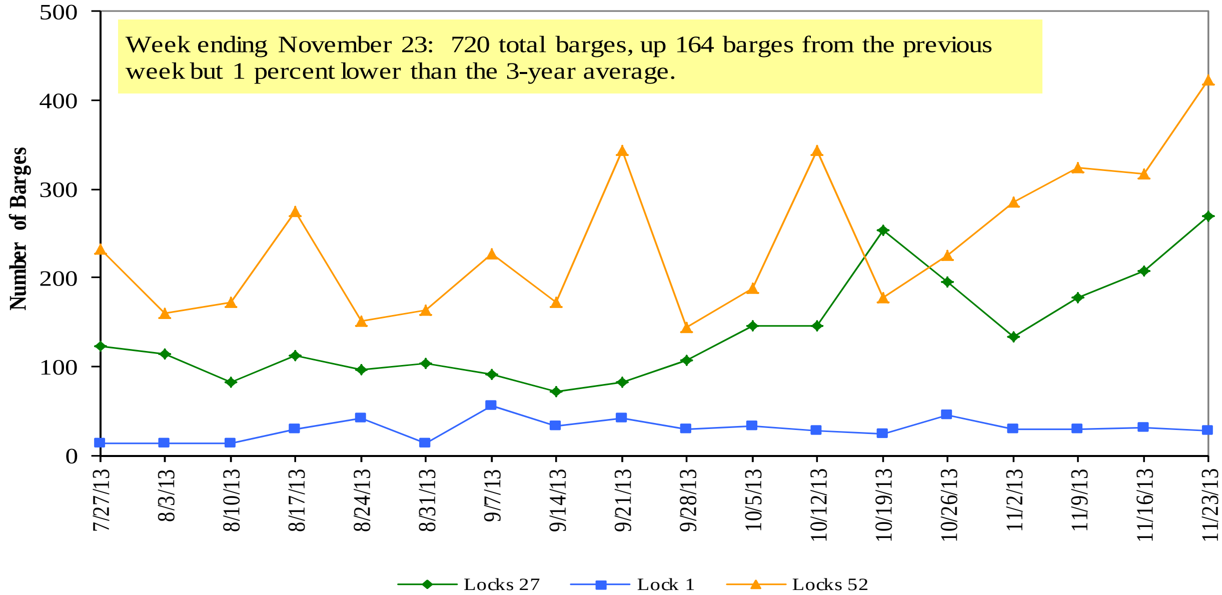
[1] Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

[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

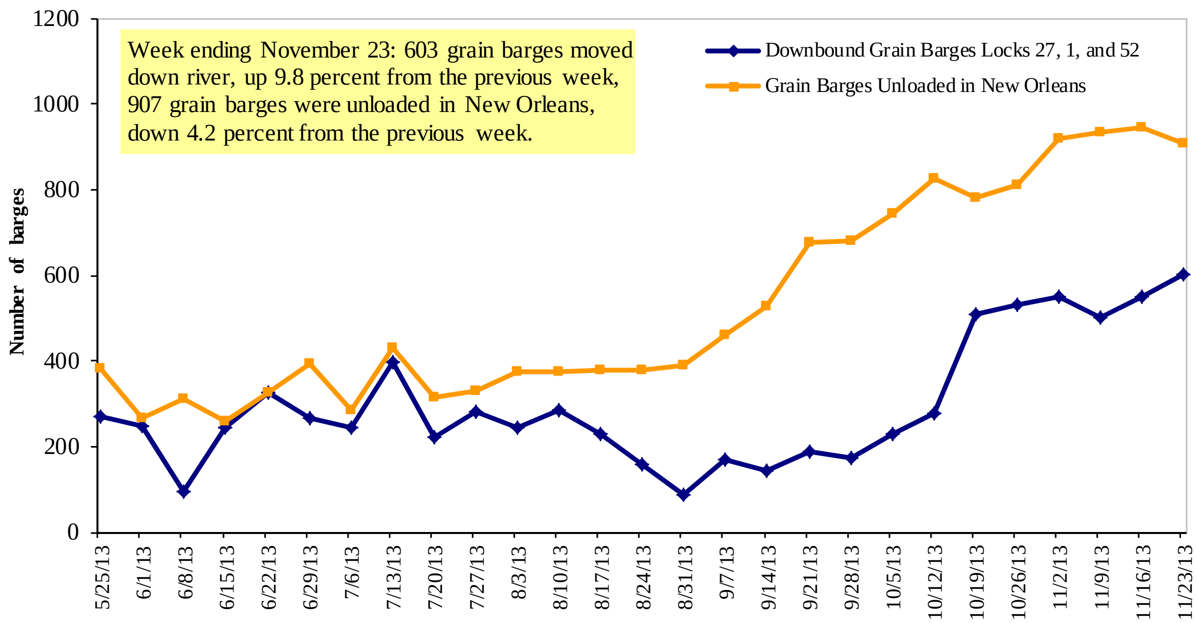
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 11/25/2013 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.870	0.029	-0.222
	New England	4.003	0.022	-0.200
	Central Atlantic	3.919	0.029	-0.284
	Lower Atlantic	3.808	0.029	-0.182
II	Midwest[2]	3.829	0.035	-0.194
III	Gulf Coast[3]	3.753	0.008	-0.149
IV	Rocky Mountain	3.837	0.001	-0.220
V	West Coast	3.954	0.000	-0.161
	West Coast less California	3.872	0.000	-0.198
	California	4.023	0.001	-0.130
Total	U.S.	3.844	0.022	-0.190

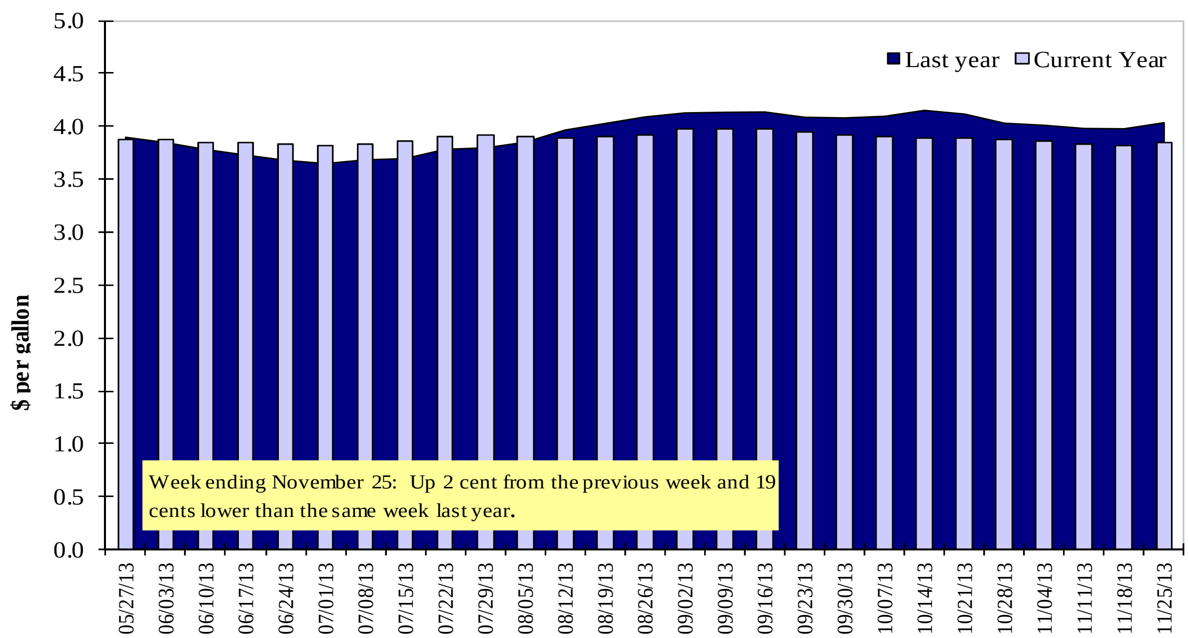
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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]									
11/14/2013	1,563	1,105	1,483	965	81	5,197	18,041	21,817	45,055
This week year ago	1,514	691	1,286	899	45	4,435	7,204	13,449	25,088
Cumulative exports-marketing year[2]									
2013/14 YTD	6,632	5,070	2,717	2,055	195	16,618	6,358	13,658	36,634
2012/13 YTD	4,596	1,582	2,818	2,148	286	11,430	4,738	13,493	29,661
YTD 2013/14 as % of 2012/13	144	320	96	96	68	145	134	101	124
Last 4 wks as % of same period 2012/13	105	167	109	107	172	117	240	175	183
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293
2011/12 Total	9,904	4,319	6,312	5,601	491	26,627	37,900	36,727	101,254

[1] Current unshipped export sales to date

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

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

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

Table 13

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

Week ending 11/14/2013	**Total Commitments**[2]		**% change**	**Exports**[3]
	2013/14	**2012/13**	**current MY**	
	Current MY	**Last MY**	**from last MY**	**2012/13**
	- 1,000 mt -			- 1,000 mt -
Japan	4,087	3,702	10	7,000
Mexico	6,661	2,736	143	4,370
China	5,168	1,021	406	2,450
Venezuela	227	227	(0)	1,158
Taiwan	371	213	75	512
Top 5 Importers	**16,514**	**7,898**	**109**	**15,490**
Total US corn export sales	**24,399**	**11,942**	**104**	**18,670**
% of Projected	68%	64%		
Change from prior week	945	770		
Top 5 importers' share of U.S. corn export sales	68%	66%		83%
USDA forecast, November 2013	**35,620**	**18,601**	**91**	
Corn Use for Ethanol USDA forecast, November 2013	**124,460**	**118,110**	**5**	

(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 11/14/2013	Total Commitments[2] 2013/14 Current MY	2012/13 Last MY	% change current MY from last MY	Exports[3] 2012/13
	- 1,000 mt -			- 1,000 mt -
China	22,967	16,760	37	21,522
Mexico	1,355	1,082	25	2,565
Japan	828	865	(4)	1,751
Indonesia	842	473	78	1,682
Taiwan	804	645	25	1,120
Top 5 importers	**26,797**	**19,825**	**35**	**28,641**
Total US soybean export sales	**35,472**	**26,942**	**32**	**37,060**
% of Projected	90%	75%		
Change from prior week	1,376	441		
Top 5 importers' share of U.S. soybean export sales	76%	74%		
USDA forecast, November 2013	**39,510**	**35,960**	**10**	

(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 11/14/2013	Total Commitments[2] 2013/14 Current MY	2012/13 Last MY	% change current MY from last MY	Exports[3] 2012/13
	- 1,000 mt -			- 1,000 mt -
Japan	1,607	2,082	(23)	3,544
Nigeria	1,713	1,867	(8)	3,002
Mexico	2,054	2,184	(6)	2,761
Philippines	1,220	1,411	(14)	1,965
Egypt	150	58	159	1,678
Korea	916	1,093	(16)	1,385
Taiwan	609	725	(16)	1,038
China	5,026	410	1126	743
Brazil	3,225	63	5018	527
Colombia	441	398	11	600
Top 10 importers	**16,960**	**10,290**	**65**	**17,243**
Total US wheat export sales	**21,814**	**15,865**	**37**	**26,348**
% of Projected	73%	58%		
Change from prior week	618	636		
Top 10 importers' share of U.S. wheat export sales	78%	65%		65%
USDA forecast, November 2013	**29,940**	**27,420**	**9**	

(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 11/21/13	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	121	132	91	10,529	11,758	90	87	75	12,625
Corn	225	187	121	1,800	5,235	34	180	74	5,512
Soybeans	505	575	88	7,863	9,296	85	171	183	10,347
Total	**851**	**894**	**95**	**20,191**	**26,290**	**77**	**151**	**131**	**28,484**
Mississippi Gulf									
Wheat	81	136	60	9,286	5,111	182	122	128	5,462
Corn	400	405	99	12,659	17,076	74	179	104	18,068
Soybeans	1,049	1,447	72	16,646	20,861	80	118	127	24,684
Total	**1,530**	**1,989**	**77**	**38,591**	**43,048**	**90**	**128**	**121**	**48,215**
Texas Gulf									
Wheat	123	168	74	8,407	5,403	156	237	97	5,912
Corn	0	0	n/a	163	336	49	0	0	336
Soybeans	15	55	28	728	459	159	348	145	626
Total	**139**	**223**	**62**	**9,298**	**6,198**	**150**	**269**	**97**	**6,874**
Interior									
Wheat	10	6	181	967	1,115	87	127	30	1,218
Corn	142	176	80	3,272	5,939	55	118	136	6,115
Soybeans	76	99	77	2,863	3,884	74	195	140	4,204
Total	**228**	**281**	**81**	**7,103**	**10,937**	**65**	**37**	**127**	**11,538**
Great Lakes									
Wheat	8	52	16	745	444	168	89	47	481
Corn	0	0	n/a	0	56	0	n/a	0	56
Soybeans	22	49	44	463	561	82	141	164	713
Total	**30**	**101**	**30**	**1,208**	**1,061**	**114**	**125**	**103**	**1,250**
Atlantic									
Wheat	0	0	n/a	645	341	189	n/a	380	341
Corn	3	2	129	228	139	164	n/a	532	143
Soybeans	107	146	74	1,139	1,031	110	100	111	1,460
Total	**110**	**148**	**74**	**2,012**	**1,510**	**133**	**127**	**134**	**1,944**
U.S. total from ports[2]									
Wheat	343	493	70	30,580	24,171	127	118	86	26,040
Corn	769	771	100	18,122	28,780	63	195	102	30,230
Soybeans	1,774	2,371	75	29,702	36,093	82	134	140	42,035
Total	**2,887**	**3,634**	**79**	**78,403**	**89,044**	**88**	**142**	**122**	**98,305**

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

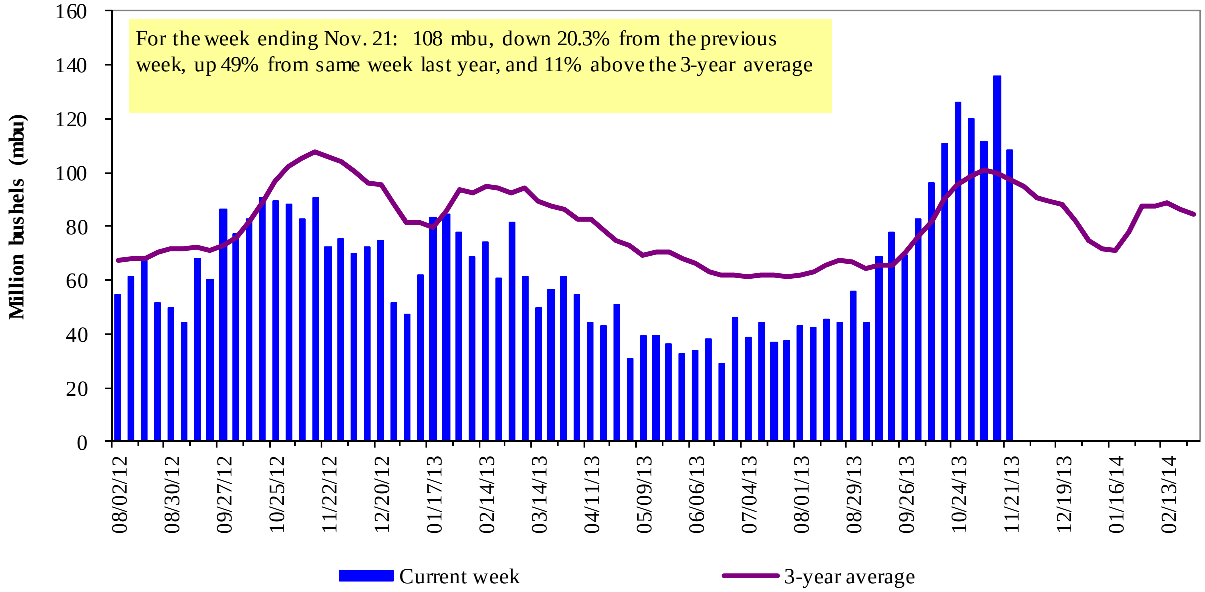
[2] Total includes only port regions shown above; Interior land-based shipments now included.

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)

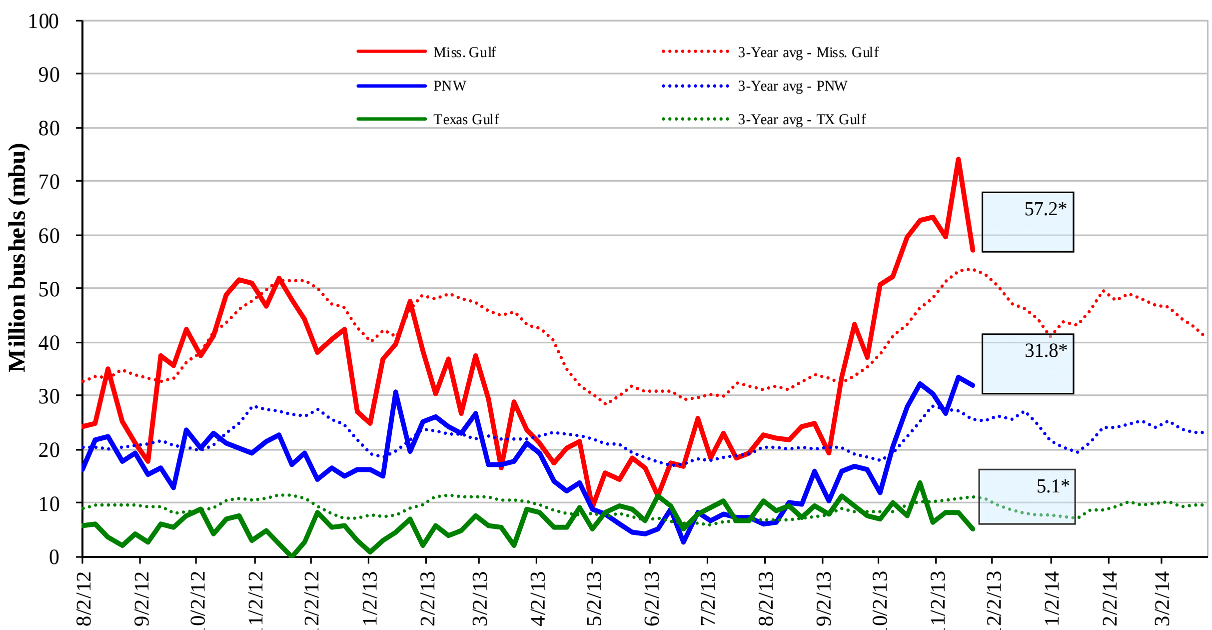


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

Nov. 21: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 23	down 38	up 24	down 25
Last year (same week)	up 20	n/a	up 30	up 85
3-yr avg. (4-wk mov. avg.)	up 9	down 30	up 4	up 63

Ocean Transportation

Table 17

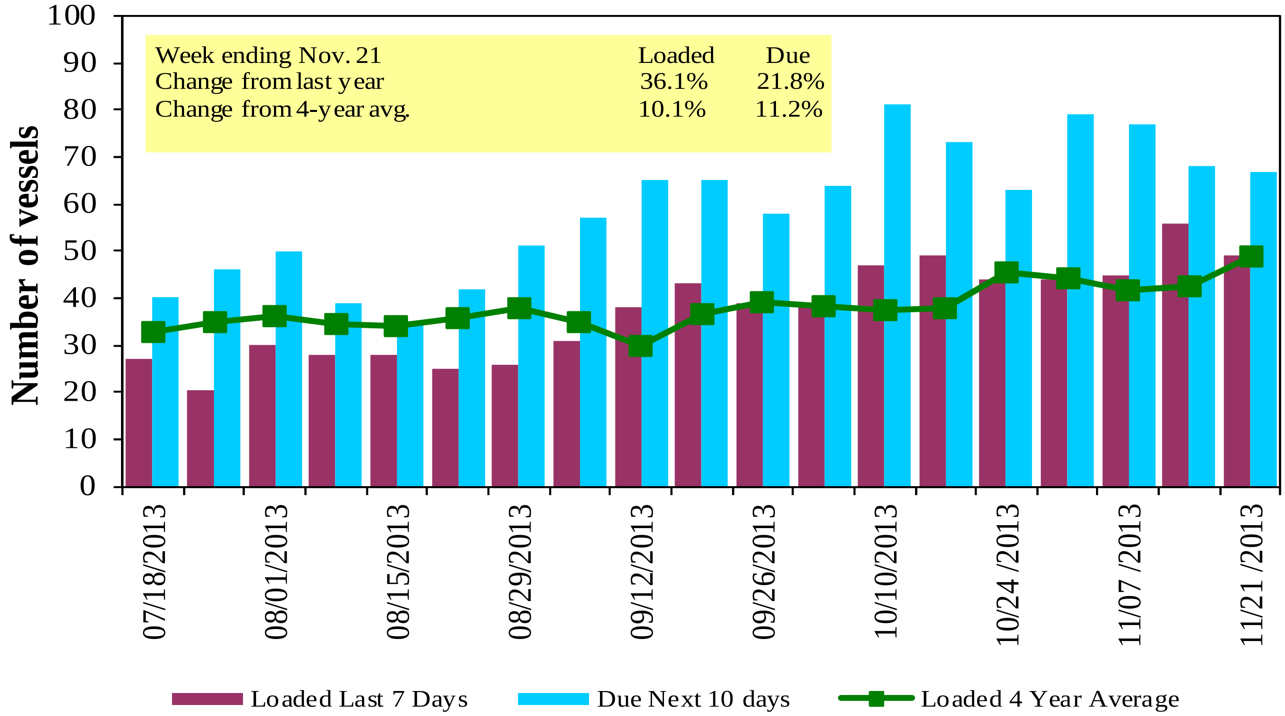
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
11/21/2013	57	49	67	19	n/a
11/14/2013	44	56	68	20	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

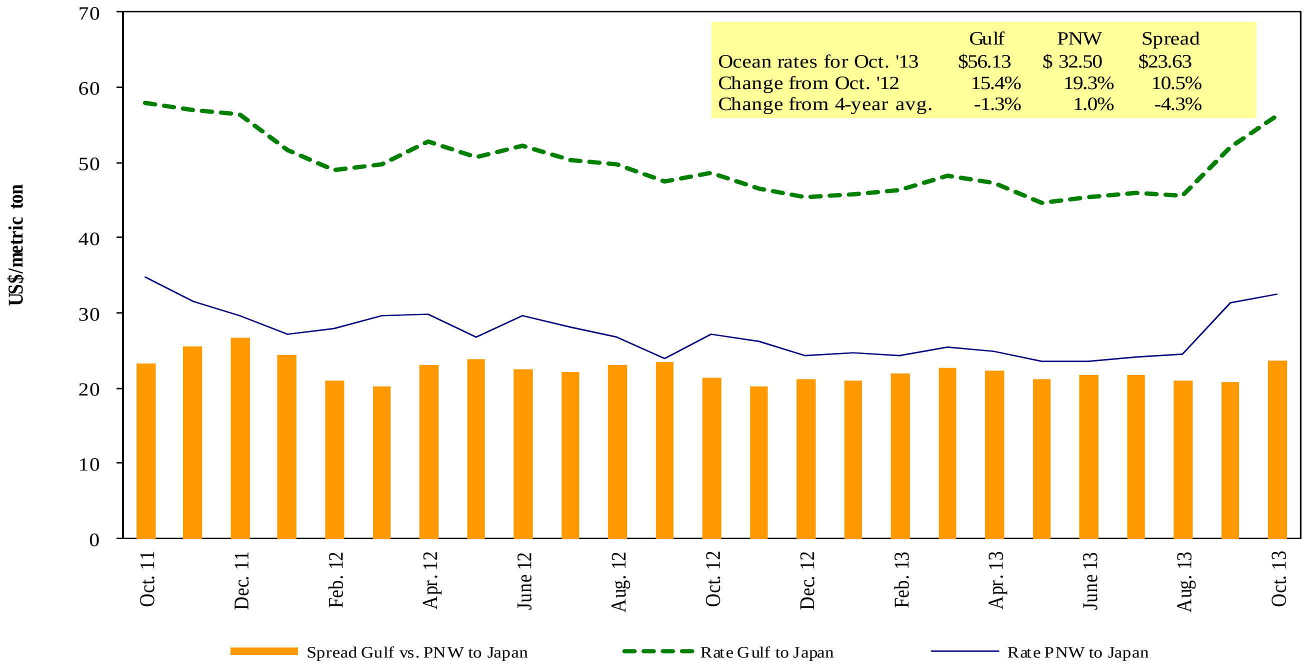


Source:Transportation & Marketing Programs/AMS/USDA

[1]U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 11/23/2013

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Dec 10/20	55,000	49.00
U.S. Gulf	China	Heavy Grain	Dec 1/10	60,000	51.00
U.S. Gulf	China	Heavy Grain	Dec 1/5	55,000	45.00
U.S. Gulf	China	Heavy Grain	Nov 20/30	60,000	52.00
U.S. Gulf	China	Heavy Grain	Nov 15/25	55,000	53.25
U.S. Gulf	China	Heavy Grain	Nov 10/20	55,000	52.50
U.S. Gulf	China	Heavy Grain	Nov 10/20	55,000	53.00
U.S. Gulf	China	Heavy Grain	Nov 15/18	55,000	54.25
U.S. Gulf	China	Heavy Grain	Nov-Dec	55,000	49.50
U.S. Gulf	China	Heavy Grain	Oct 1/Dec 31	55,000	33.00
U.S. Gulf	Djibouti[1]	Wheat	Dec 16/26	35,880	125.62
U.S. Gulf	S. Korea	Heavy Grain	Nov 19/20	60,000	53.50
Atlantic	China	Heavy Grain	Nov 20/25	55,000	50.25
Brazil	Indonesia	Grain	Sep 29/Oct 4	73,000	29.10
Brazil	Morocco	Corn	Oct 25/Nov 5	29,000	20.50
Brazil	Morocco	Corn	Sep 25/30	30,000	20.00
France	Algeria	Wheat	Dec 1/5	25,000	26.00
Mexico	Algeria	Wheat	Nov 15/30	55,000	34.00
Ukraine	Italy	Corn	Oct 30/31	25,000	26.00

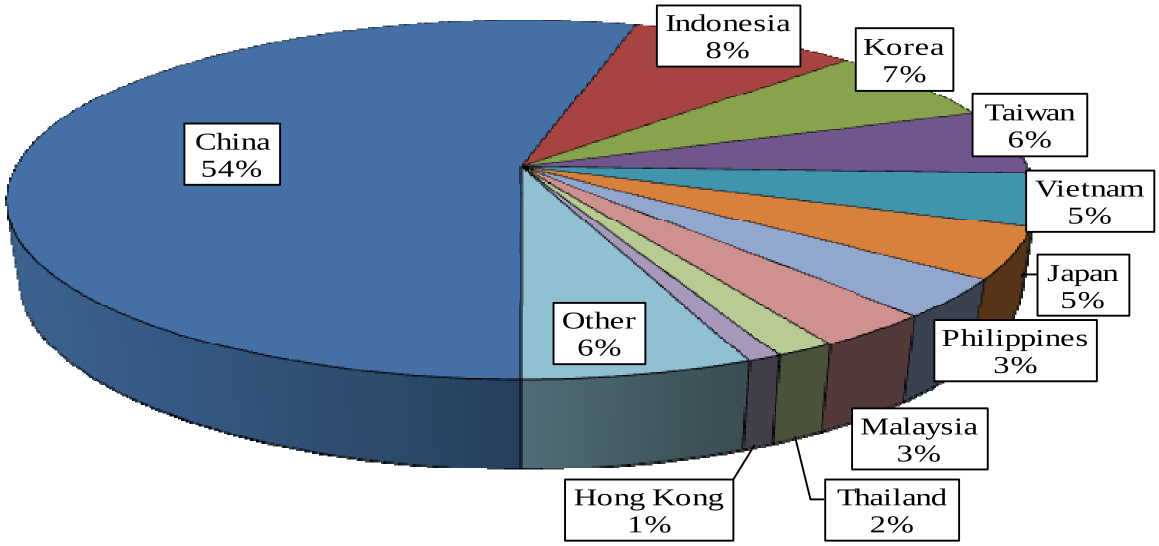
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

[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.

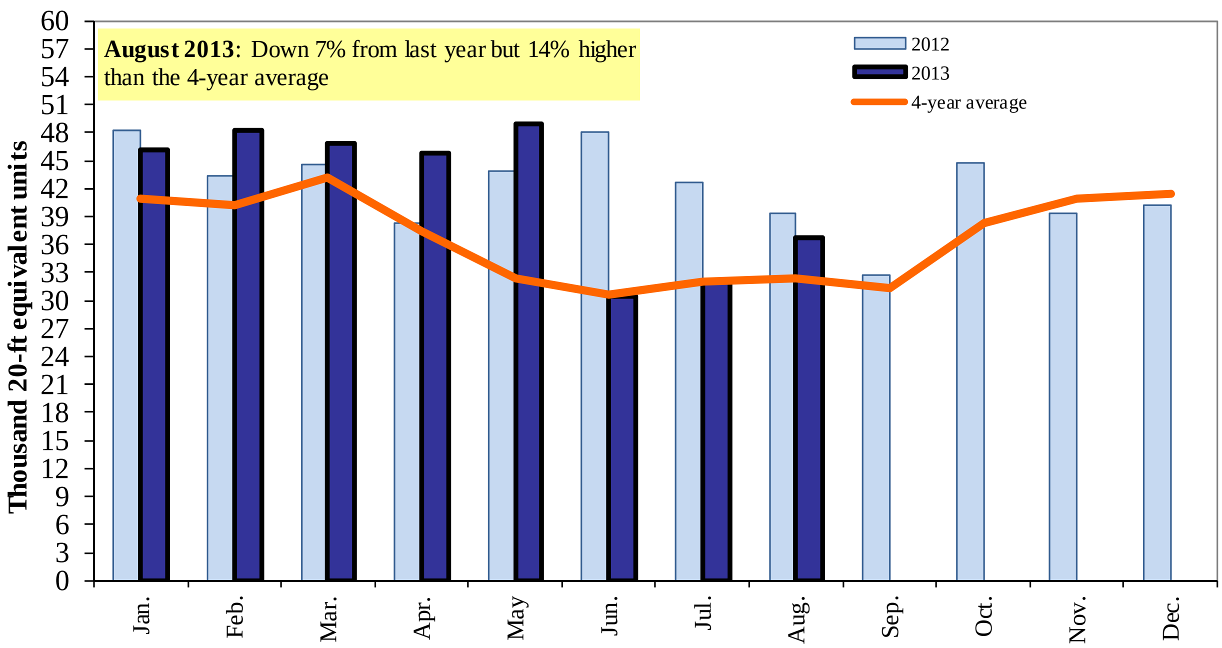
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, August 2013



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

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

Figure 19
Monthly Shipments of Containerized Grain to Asia



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

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

Contacts and Links

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