



Grain Transportation Report

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

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Dec. 5, 2013

WEEKLY HIGHLIGHTS

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Winter Mississippi River Lock Closures and River Improvements

Every December, the U.S. Army Corps of Engineers schedules certain Mississippi River Locks to be closed for repairs. Additionally, portions of the Mississippi River begin to have ice accumulations at this time of year that halt traffic, so shutting specific locks has limited impact on commerce. Mississippi River Lock and Dam 18, near Gladstone, IL, will be closed for repairs from December 18, 2013, through March 4, 2014. Mississippi River Lock 22 will close from January 7 to March 4. Weather permitting, the Illinois River will remain open during the winter months. In addition, the lower locks on the Mississippi River, near St. Louis, MO, are scheduled to remain open. The Pinnacle Removal Project- Phase II on the Mississippi River at Thebes, IL, will begin no later than mid-December. Work there may delay barge movements as traffic restrictions may be implemented around the rock removal site.

Corn and Wheat Inspections Rebound

For the week ending November 28, total inspections of corn for export reached .907 million metric tons (mmt), up 18 percent from the past week and 240 percent above last year at this time. Corn inspections through the Pacific Northwest jumped 46 percent (.328 mmt), primarily to Asian destinations. Wheat inspections also rebounded from the previous week, reaching .422 mmt, up 23 percent. The increases in corn and wheat inspections could not offset the 19 percent drop in soybean inspections. **Total inspections of grain** (corn, wheat, and soybeans) for export from all major port regions reached 2.76 mmt, down 4 percent from the previous week, but up 36 percent from last year at this time and 9 percent above the 3-year average. Total grain inspections during the last 4 weeks also remained above last year at this time and above the 3-year average. Outstanding (unshipped) export sales continued to rise for corn and wheat but decreased for soybeans.

Maritime Administration Releases Study of Panama Canal Expansion

The U.S. Department of Transportation's Maritime Administration (MARAD) recently released a study on shipping patterns and industry costs that will help the United States prepare for the anticipated impact on its ports, waterways, and intermodal freight systems from the Panama Canal Expansion. The Panama Canal Expansion Study, the first of a two-part study, found that the integration of Post-Panamax vessels into U.S. trade lanes will have substantial implications for the nation's shippers, ports, and surface freight corridors, particularly along the East Coast, Gulf Coast, and inland States located east of the Mississippi River. In addition, the more cost-effective service of larger vessels could improve the ability of some U.S. exports, such as grain, to compete in global markets. However, shifts in shipping patterns are likely to occur slowly and over time.

FMC Plans Global Regulatory Summit

On December 2, the Federal Maritime Commission (FMC) announced its plan to host a global regulatory summit on December 17 to address the impending development of the P3 Alliance. FMC has confirmed attendance of international regulators from the People's Republic of China and the European Union. Items to be discussed include carrier alliances, vessel sharing agreements, and the impact of operational agreements on international trade. FMC Chairman Mario Cordero stated, "We welcome the exchange of views with our regulatory counterparts. The shipping industry is dynamic as evidenced by the changing nature of agreements. The effects of these trends will have global implications that demand an international understanding of our changing industry." Further details regarding the global regulatory summit will be made available on the [FMC website](#).

Snapshots by Sector

Rail

U.S. railroads originated 22,493 **carloads of grain** during the week ending November 23, down 7 percent from last week, up 35 percent from last year, and up 4 percent from the 3-year average.

During the week ending November 28, average December non-shuttle **secondary railcar bids/offers per car** were \$175 above tariff, the same as last week, and \$187.50 higher than last year. Average shuttle bids/offers were \$662.50 above tariff, up \$127 from last week and \$835.50 higher than last year.

Barge

During the week ending November 30, **barge grain movements** totaled 904,552 tons the highest weekly volume so far this year—3.2 percent higher than the previous week but 0.3 percent lower than the same period last year.

During the week ending November 30, 563 grain barges **moved down river**, down 6.6 percent from last week; 839 grain barges were **unloaded in New Orleans**, down 7.5 percent from the previous week.

Ocean

During the week ending November 28, 43 **ocean-going grain vessels** were loaded in the Gulf, 5 percent more than the same period last year. Seventy-eight vessels are expected to be loaded within the next 10 days, 47 percent more than the same period last year.

During the week ending November 29, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$54.50 per mt, up 3 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$29 per mt, up 4 percent from the previous week.

Fuel

During the week ending December 2, U.S. average **diesel fuel price** increased 4 cents from the previous week to \$3.88 per gallon—14 cents lower than the same week last year.

Feature Article/Calendar

Truck and Ocean Rates Drive Increase in Wheat Transportation Costs

Wheat transportation costs increased during the third quarter as trucking rates reached one of the highest levels on record and ocean rates started to rebound. Demand for trucking services increased as the U.S. harvest began. Transportation costs for shipping wheat from Kansas (KS) to Japan through the Pacific Northwest (PNW) increased 8 percent from the second quarter 2013, and the costs to ship from North Dakota (ND) to Japan via the PNW increased 7 percent from the same period. Compared to last year, the cost to ship from Kansas through the PNW increased more than 2 percent, while shipping from North Dakota increased less than 3 percent (*see tables*). The costs of shipping wheat from Kansas to Japan through the U.S. Gulf increased 7 percent from the second quarter while the costs to ship from North Dakota increased more than 4 percent. Compared to last year, the costs to ship from Kansas and North Dakota remained about the same for shipping wheat through the Gulf. Third quarter wheat transportation costs represented 27 to 33 percent of the landed costs, about the same as the second quarter 2013 but greater than the third quarter last year.

Table 1: Quarterly rate comparisons for shipping KS & ND wheat to Japan through the PNW

Mode	KS					ND				
	2012 3rd qtr	2013 2nd qtr	2013 3rd qtr	Year-to-Year change	Quarterly change	2012 3rd qtr	2013 2nd qtr	2013 3rd qtr	Year-to-Year change	Quarterly change
	\$/metric ton			%	%	\$/metric ton			%	%
Truck	13.51	9.46	13.39	-0.89	41.54	13.51	9.46	13.39	-0.89	41.54
Rail ¹	53.71	55.41	55.75	3.80	0.61	53.89	56.35	56.14	4.18	-0.37
Ocean vessel	26.31	24.00	26.63	1.22	10.96	26.31	24.00	26.63	1.22	10.96
Transportation Costs	93.53	88.87	95.77	2.39	7.76	93.71	89.81	96.16	2.61	7.07
Farm Value ²	303.63	269.33	255.61	-15.82	-5.09	297.62	285.01	259.66	-12.75	-8.89
Total Landed Cost	397.16	358.20	351.38	-11.53	-1.90	391.33	374.82	355.82	-9.07	-5.07
Transport % of landed cost	23.55	24.81	27.26			23.95	23.96	27.02		

Table 2: Quarterly rate comparisons for shipping KS & ND wheat to Japan through the Gulf

Mode	KS					ND				
	2012 3rd qtr	2013 2nd qtr	2013 3rd qtr	Year-to-Year change	Quarterly change	2012 3rd qtr	2013 2nd qtr	2013 3rd qtr	Year-to-Year change	Quarterly change
	\$/metric ton			%	%	\$/metric ton			%	%
Truck	13.51	9.46	13.39	-0.89	41.54	13.51	9.46	13.39	-0.89	41.54
Rail ¹	38.36	39.38	40.08	4.48	1.78	64.24	66.74	66.18	3.02	-0.84
Ocean vessel	49.18	45.78	47.79	-2.83	4.39	49.18	45.78	47.79	-2.83	4.39
Transportation Costs	101.05	94.62	101.26	0.21	7.02	126.93	121.98	127.36	0.34	4.41
Farm Value ²	303.63	269.33	255.61	-15.82	-5.09	297.62	285.01	259.66	-12.75	-8.89
Total Landed Cost	404.68	363.95	356.87	-11.81	-1.95	424.55	406.99	387.02	-8.84	-4.91
Transport % of landed cost	24.97	26.00	28.37			29.90	29.97	32.91		

Source: USDA/AMS/TMP

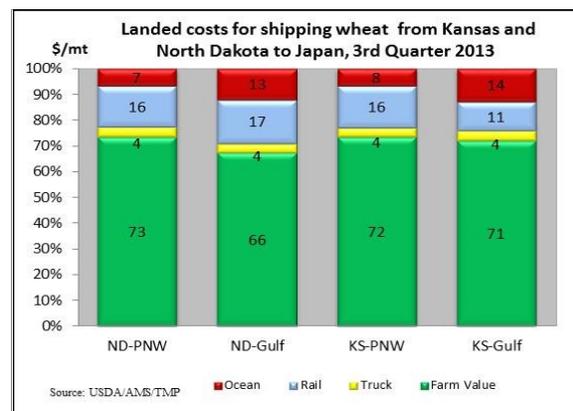
¹ Rail tariff rates include fuel surcharges and revisions for heavy axle railcars and shuttle trains.

² Source: USDA/NASS, wheat prices for North Dakota (mainly HRS) and Kansas (mainly HRW)

The total landed cost (farm value plus transportation costs) for shipping wheat to Japan ranged from \$351 to \$387 per metric ton (mt), below both the previous quarter and last year for each route (*see tables*).

Quarter-to-quarter total landed costs decreased mainly because of lower farm values. They decreased 2 percent for shipping through the PNW from Kansas and 5 percent from North Dakota. Landed costs to ship through the Gulf for the same period also decreased 2 and 5 percent, respectively. Year-to-year landed costs were down 12 percent for shipping wheat from Kansas and down 9 percent for shipping from North Dakota.

Third quarter farm values for wheat produced in Kansas accounted for 72 percent of the landed cost for shipping through the PNW and 71 percent through the Gulf, less than both the second quarter and last year (*see figure*). North Dakota wheat farm values



accounted for 73 and 66 percent of the total landed cost during the third quarter, also below the second quarter last year this time.

Ocean rates for wheat shipped from the PNW to Japan rebounded during the third quarter, increasing 11 percent from the second quarter and 1 percent above last year this time; as demand for bulk grain increased in the U.S. Gulf (*GTR dated 11/07/13*). Ocean rates for wheat shipped from the Gulf to Japan increased over 4 percent from the second quarter but dropped 3 percent from last year.

Quarter-to-quarter rail rates for shipping wheat from Kansas through the PNW remained steady, but increased 2 percent for wheat shipped through the Gulf. Rail rates for shipping wheat from North Dakota through the PNW remained stable but decreased about 1 percent from the Gulf quarter-to-quarter. Kansas and North Dakota rail rates for shipping wheat to the PNW increased 4 percent year to year, and the rates were up 5 and 3 percent to ship through the Gulf (see table 2). The cost of moving wheat from each State by truck to a rail-served grain elevator reached the second highest level on record, up 42 percent quarter-to-quarter. The increase was caused partly by the high demand for the trucking of wheat. Third quarter year-to-year trucking rates were down slightly. Trucking rates for moving grain from the North Central U.S. are currently at the second highest level on record.

According to the Grain Inspection Packers and Stockyards Administration, the total amount of wheat inspected for export to Japan during the third quarter was .80 million mt, down 27 percent from last year at this time, representing 7 percent of total U.S. wheat exports. For the same period, total U.S. wheat exports reached 11.19 million mt, 52 percent above last year. For the 2013/14 marketing year, year-to-date cumulative (shipped) export sales of all wheat are up 45 percent from the past year (*See GTR, Table 12*). Johnny.Hill@ams.usda.gov

Grain Transportation Indicators

Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
12/04/13	261	249	242	301	244	206
11/27/13	258	249	238	294	237	199

¹Indicator: Base year 2000 = 100; Weekly updates include truck = diesel (\$/gallon); rail = near-month secondary rail market bid and monthly tariff rate with fuel surcharge (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); and ocean = routes to Japan (\$/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

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

Commodity	Origin--Destination	11/29/2013	11/22/2013
Corn	IL--Gulf	n/a	-0.95
Corn	NE--Gulf	n/a	-1.02
Soybean	IA--Gulf	n/a	-1.33
HRW	KS--Gulf	n/a	-1.47
HRS	ND--Portland	n/a	-2.30

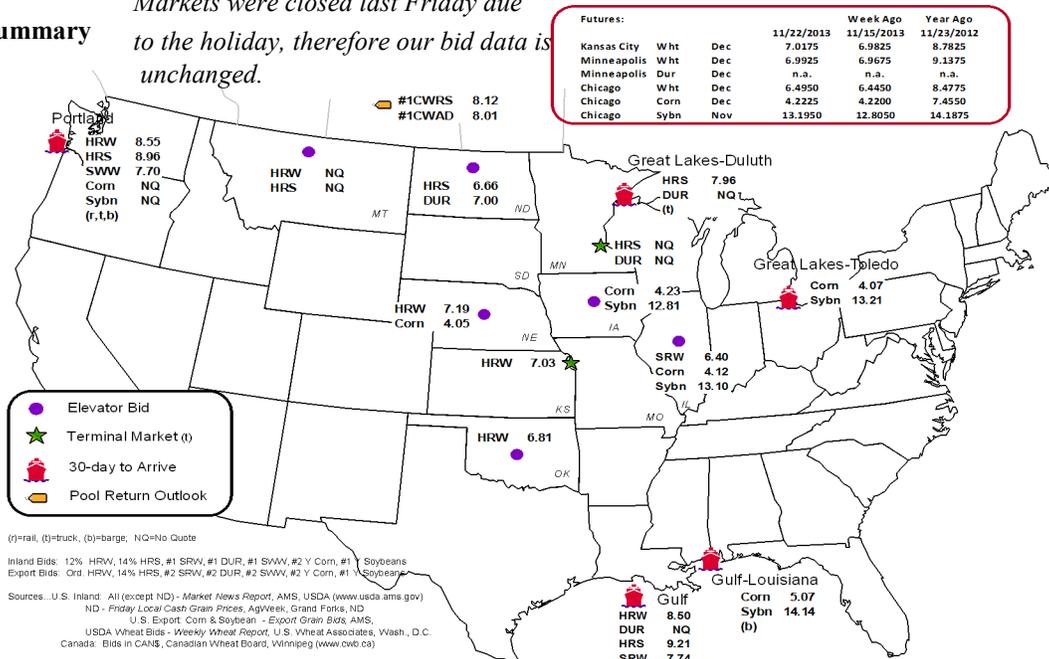
Note: nq = no quote

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

Markets were closed last Friday due to the holiday, therefore our bid data is unchanged.



Rail Transportation

Table 3

Rail Deliveries to Port (carloads)¹

Week ending	Mississippi		Pacific	Atlantic &		Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf				
11/27/2013 ^p	2,001	1,648	6,480	1,211		11,340	11/23/13	1,420
11/20/2013 ^r	2,314	1,074	7,285	1,278		11,951	11/16/13	2,345
2013 YTD ^r	25,707	67,318	148,402	20,811		262,238	2013 YTD	63,500
2012 YTD ^r	17,362	37,845	185,467	20,791		261,465	2012 YTD	87,429
2013 YTD as % of 2012 YTD	148	178	80	100		100	% change YTD	73
Last 4 weeks as % of 2012 ²	218	177	167	128		170	Last 4wks % 2012	125
Last 4 weeks as % of 4-year avg. ²	188	74	168	127		146	Last 4wks % 4 yr	109
Total 2012	22,604	40,780	199,419	45,470		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 approximately 15 percent below the Association of American Railroads reported weekly carloads received by Mexican railroads to reflect switching between KCSM and FerroMex.

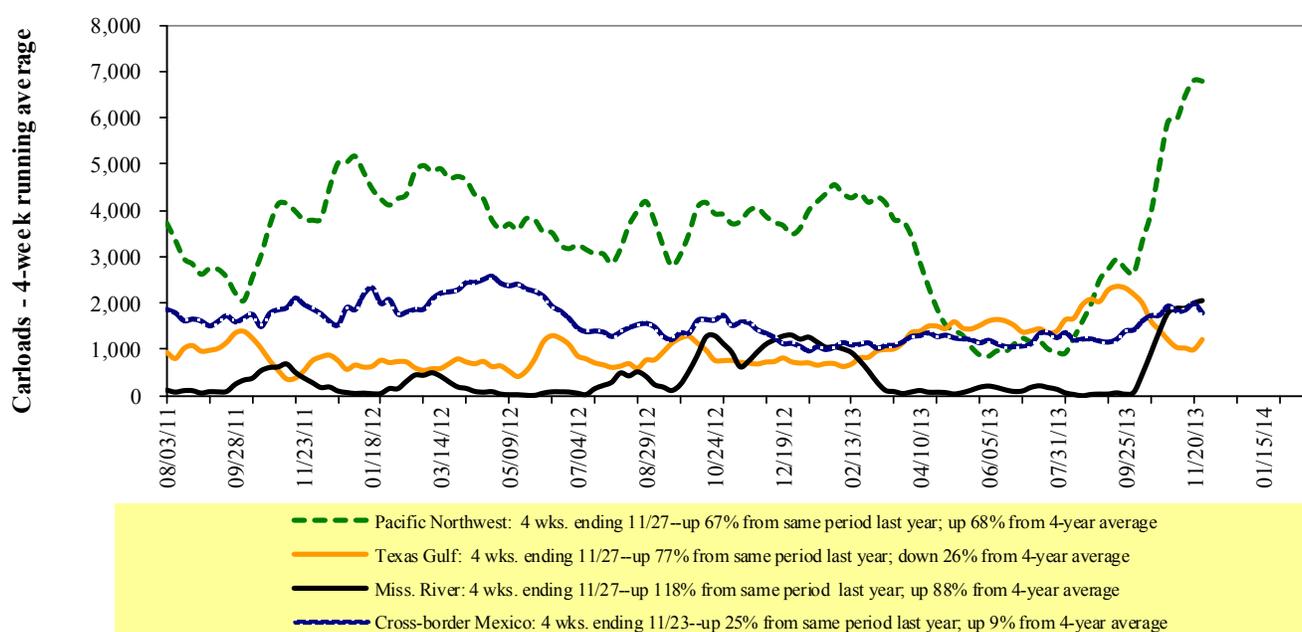
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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

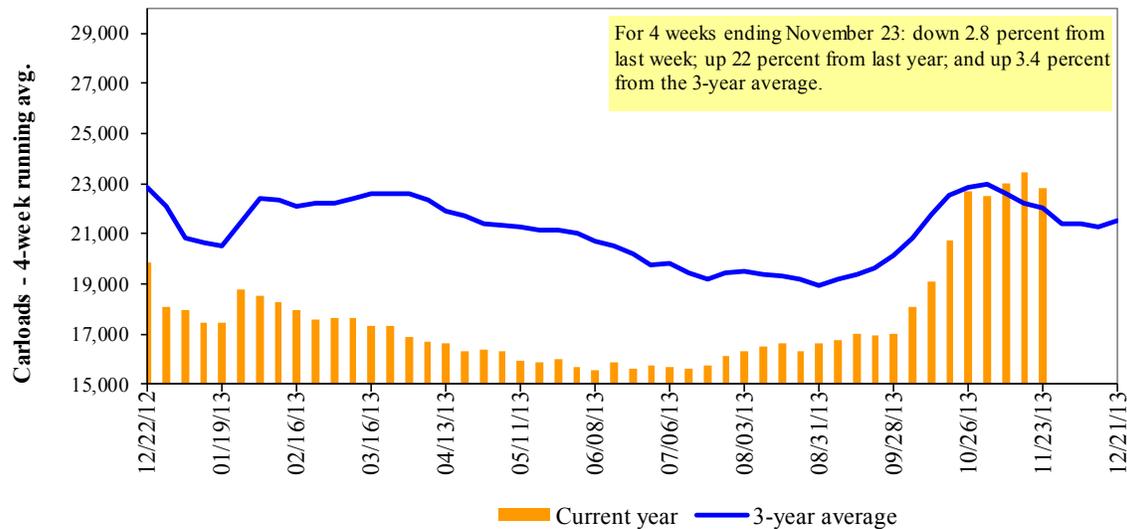
Table 4

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
11/23/13	2,667	4,135	9,240	747	5,704	22,493	4,387	6,409
This week last year	1,503	2,883	8,383	503	3,392	16,664	4,427	5,882
2013 YTD	75,068	122,328	411,856	30,420	194,558	834,230	168,695	248,405
2012 YTD	77,580	131,640	466,353	24,422	224,600	924,595	184,588	236,521
2013 YTD as % of 2012 YTD	97	93	88	125	87	90	91	105
Last 4 weeks as % of 2012	156	138	93	170	165	122	123	104
Last 4 weeks as % of 3-yr avg. ¹	121	134	88	169	118	107	130	112
Total 2012	85,384	145,336	515,638	26,936	244,077	1,017,371	204,068	266,266

¹As a percent of the same period in 2009 and the prior 3-year average. YTD = year-to-date.

Source: Association of American Railroads (www.aar.org)

Figure 3**Total Weekly U.S. Class I Railroad Grain Car Loadings**

Source: Association of American Railroads

Table 5

Railcar Auction Offerings¹ (\$/car)²

Week ending	Delivery period							
	Dec-13	Dec-12	Jan-14	Jan-13	Feb-14	Feb-13	Mar-14	Mar-13
BNSF ³								
COT grain units	no offer	1	no offer	no bids	no offer	0	153	no bids
COT grain single-car ⁵	no offer	0 . . 9	no offer	0 . . 1	no offer	0	0 . . 104	0
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

¹Auction offerings are for single-car and unit train shipments only.

²Average premium/discount to tariff, last auction

³BNSF - COT = Certificate of Transportation; north grain and south grain bids were combined effective the week ending 6/24/06.

⁴UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

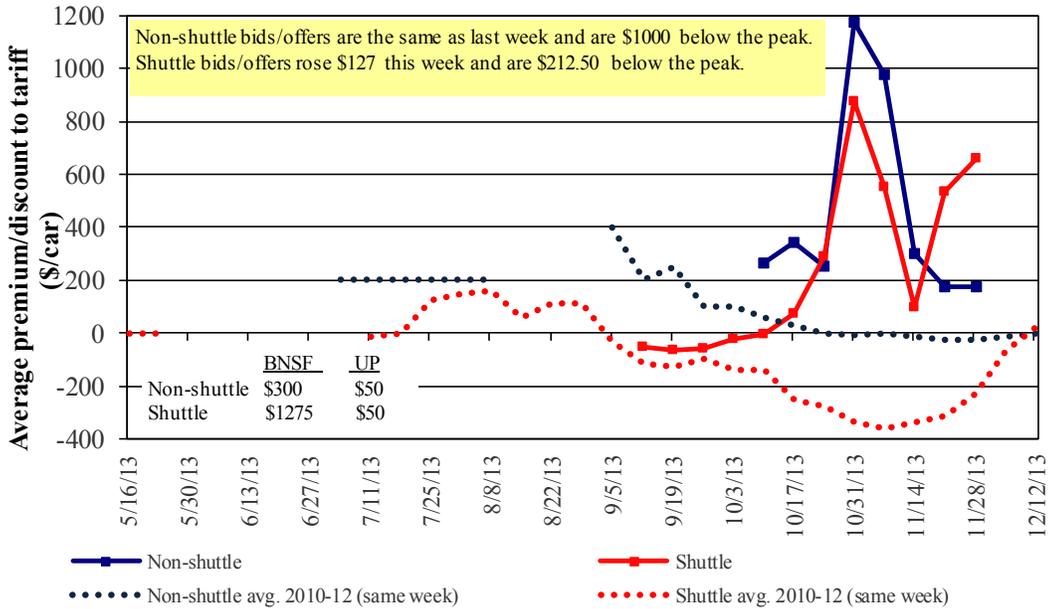
⁵Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4

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

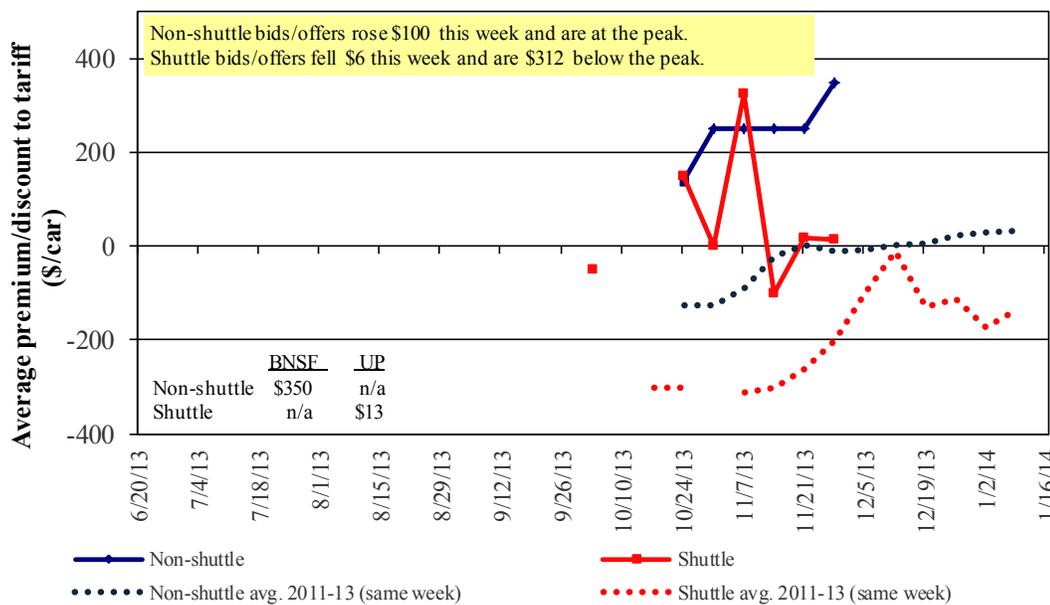


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

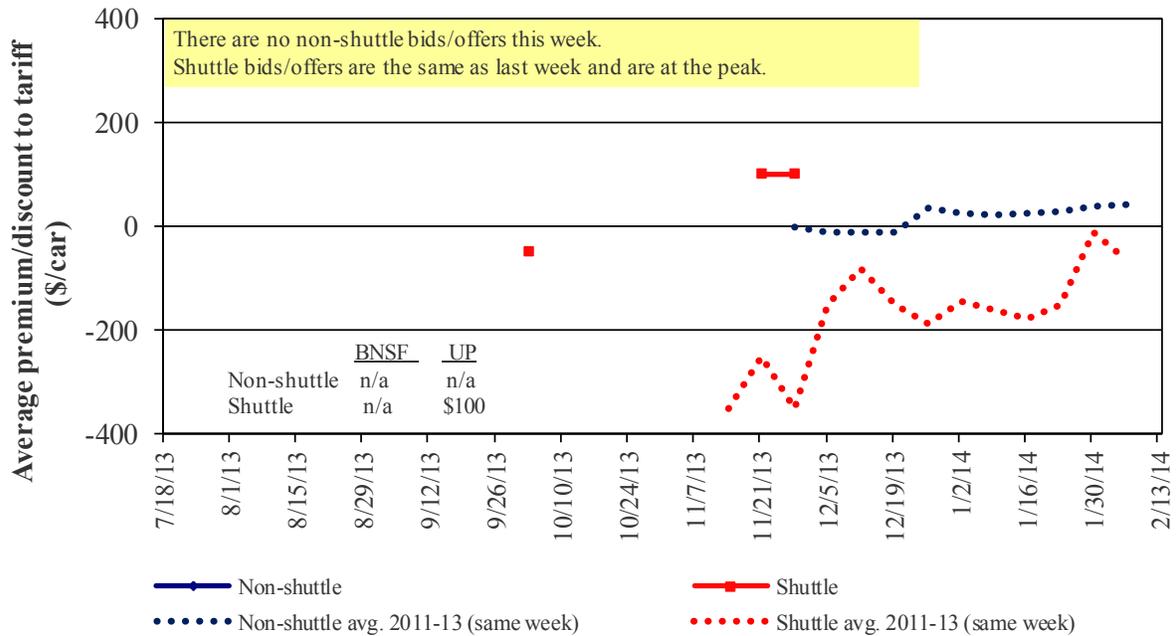


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

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					
	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14
Non-shuttle						
BNSF-GF	300	350	n/a	n/a	n/a	n/a
Change from last week	-	100	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
Change from same week 2012	50	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	1,275	n/a	n/a	n/a	n/a	n/a
Change from last week	292	n/a	n/a	n/a	n/a	n/a
Change from same week 2012	1,496	n/a	n/a	n/a	n/a	n/a
UP-Pool	50	13	100	-	(100)	(100)
Change from last week	(38)	(6)	-	-	-	-
Change from same week 2012	175	113	n/a	150	n/a	n/a

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

²Shuttle 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 Shipments¹

Effective date:				Fuel	Tariff plus surcharge per:		Percent
12/1/2013	Origin region*	Destination region*	Tariff rate/car	surcharge per car	metric ton	bushe ²	change Y/Y ³
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,191	\$182	\$33.50	\$0.91	1
	Grand Forks, ND	Duluth-Superior, MN	\$3,596	\$104	\$36.75	\$1.00	4
	Wichita, KS	Los Angeles, CA	\$6,244	\$536	\$67.32	\$1.83	2
	Wichita, KS	New Orleans, LA	\$3,808	\$320	\$41.00	\$1.12	3
	Sioux Falls, SD	Galveston-Houston, TX	\$5,824	\$440	\$62.20	\$1.69	3
	Northwest KS	Galveston-Houston, TX	\$4,076	\$351	\$43.96	\$1.20	3
	Amarillo, TX	Los Angeles, CA	\$4,275	\$489	\$47.30	\$1.29	2
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,192	\$362	\$35.29	\$0.90	1
	Toledo, OH	Raleigh, NC	\$4,686	\$416	\$50.66	\$1.29	3
	Des Moines, IA	Davenport, IA	\$2,078	\$77	\$21.40	\$0.54	3
	Indianapolis, IN	Atlanta, GA	\$4,061	\$312	\$43.43	\$1.10	3
	Indianapolis, IN	Knoxville, TN	\$3,469	\$200	\$36.44	\$0.93	3
	Des Moines, IA	Little Rock, AR	\$3,218	\$225	\$34.19	\$0.87	1
	Des Moines, IA	Los Angeles, CA	\$5,215	\$656	\$58.30	\$1.48	1
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,599	\$395	\$39.66	\$1.08	1
	Toledo, OH	Huntsville, AL	\$3,687	\$295	\$39.55	\$1.08	2
	Indianapolis, IN	Raleigh, NC	\$4,756	\$419	\$51.39	\$1.40	3
	Indianapolis, IN	Huntsville, AL	\$3,379	\$200	\$35.54	\$0.97	3
	Champaign-Urbana, IL	New Orleans, LA	\$3,748	\$362	\$40.82	\$1.11	3
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,678	\$308	\$39.58	\$1.08	4
	Wichita, KS	Galveston-Houston, TX	\$3,798	\$240	\$40.10	\$1.09	3
	Chicago, IL	Albany, NY	\$3,950	\$390	\$43.10	\$1.17	3
	Grand Forks, ND	Portland, OR	\$5,159	\$532	\$56.51	\$1.54	2
	Grand Forks, ND	Galveston-Houston, TX	\$6,084	\$554	\$65.92	\$1.79	0
	Northwest KS	Portland, OR	\$5,043	\$576	\$55.80	\$1.52	3
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$648	\$56.09	\$1.42	2
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$593	\$55.15	\$1.40	2
	Champaign-Urbana, IL	New Orleans, LA	\$3,011	\$362	\$33.50	\$0.85	3
	Lincoln, NE	Galveston-Houston, TX	\$3,510	\$346	\$38.29	\$0.97	4
	Des Moines, IA	Amarillo, TX	\$3,590	\$283	\$38.46	\$0.98	3
	Minneapolis, MN	Tacoma, WA	\$5,000	\$643	\$56.03	\$1.42	2
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,400	\$665	\$50.29	\$1.28	2
	Sioux Falls, SD	Tacoma, WA	\$5,520	\$593	\$60.71	\$1.65	2
	Minneapolis, MN	Portland, OR	\$5,530	\$648	\$61.35	\$1.67	2
	Fargo, ND	Tacoma, WA	\$5,430	\$527	\$59.16	\$1.61	2
	Council Bluffs, IA	New Orleans, LA	\$4,175	\$418	\$45.61	\$1.24	6
	Toledo, OH	Huntsville, AL	\$2,862	\$295	\$31.35	\$0.85	3
	Grand Island, NE	Portland, OR	\$5,110	\$589	\$56.60	\$1.54	-3

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

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

³Percentage change year over year calculated using tariff rate plus fuel surcharge

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

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

Table 8

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

Effective date: 12/1/2013

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel		Percent change Y/Y ⁴	
				surcharge per car ²	Tariff plus surcharge per: metric ton ³ bushel ³		
Wheat	MT	Chihuahua, CI	\$6,360	\$563	\$70.73	\$1.92	-17
	OK	Cuautitlan, EM	\$6,156	\$684	\$69.88	\$1.90	-10
	KS	Guadalajara, JA	\$6,559	\$660	\$73.77	\$2.01	-12
	TX	Salinas Victoria, NL	\$2,898	\$258	\$32.24	\$0.88	-18
Corn	IA	Guadalajara, JA	\$7,974	\$777	\$89.41	\$2.27	2
	SD	Celaya, GJ	\$7,656	\$736	\$85.75	\$2.18	2
	NE	Queretaro, QA	\$7,317	\$690	\$81.81	\$2.08	1
	SD	Salinas Victoria, NL	\$5,880	\$560	\$65.80	\$1.67	2
	MO	Tlalnepantla, EM	\$6,755	\$670	\$75.87	\$1.93	1
	SD	Torreón, CU	\$6,722	\$617	\$74.98	\$1.90	2
Soybeans	MO	Bojay (Tula), HG	\$7,868	\$655	\$87.08	\$2.37	2
	NE	Guadalajara, JA	\$8,447	\$749	\$93.96	\$2.55	2
	IA	El Castillo, JA	\$8,855	\$732	\$97.95	\$2.66	2
	KS	Torreón, CU	\$6,864	\$465	\$74.88	\$2.04	2
Sorghum	TX	Guadalajara, JA	\$6,764	\$479	\$74.01	\$1.88	1
	NE	Celaya, GJ	\$7,272	\$669	\$81.13	\$2.06	3
	KS	Queretaro, QA	\$7,005	\$420	\$75.86	\$1.93	7
	NE	Salinas Victoria, NL	\$5,628	\$492	\$62.52	\$1.59	7
	NE	Torreón, CU	\$6,328	\$549	\$70.26	\$1.78	3

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

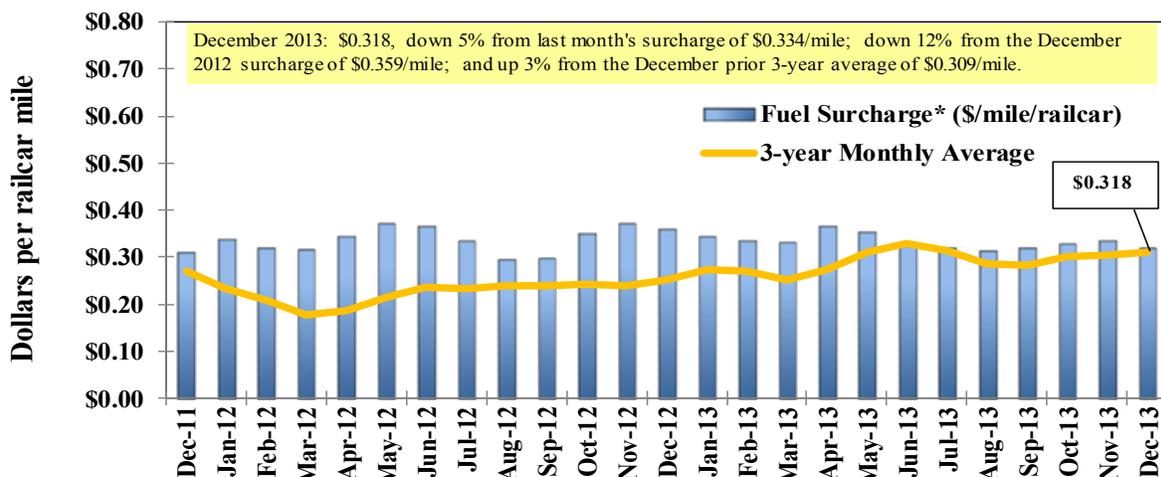
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V. railroad fuel surcharge policy as of 10/01/2009

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

⁴Percentage change year over year calculated using tariff rate plus fuel surcharge

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹

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

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

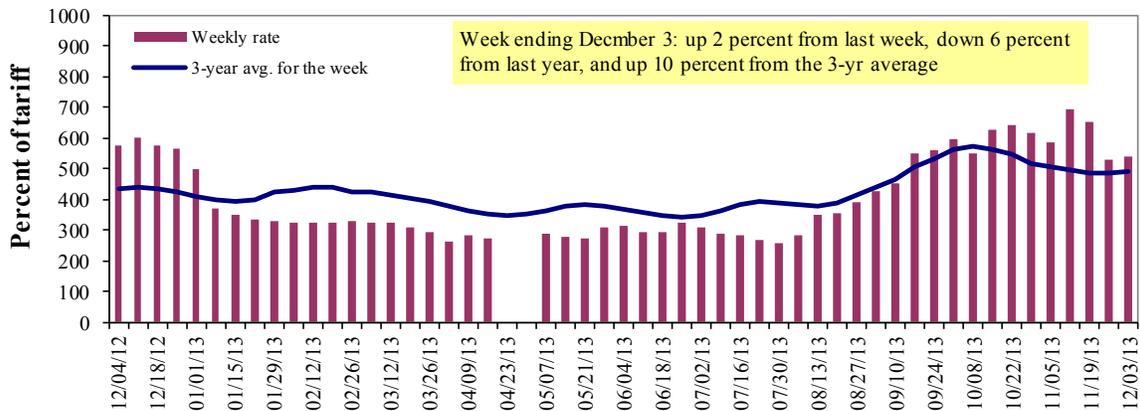
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	12/3/2013	--	--	542	462	542	542	337
	11/26/2013	500	543	530	460	538	538	363
\$/ton	12/3/2013	--	--	25.15	18.43	25.42	21.90	10.58
	11/26/2013	30.95	28.89	24.59	18.35	25.23	21.74	11.40
Current week % change from the same week:								
	Last year	--	--	-6	-12	3	3	-14
	3-year avg. ²	--	--	10	15	21	21	0
Rate¹	January	--	--	508	400	487	487	325
	March	--	415	405	362	397	397	302

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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

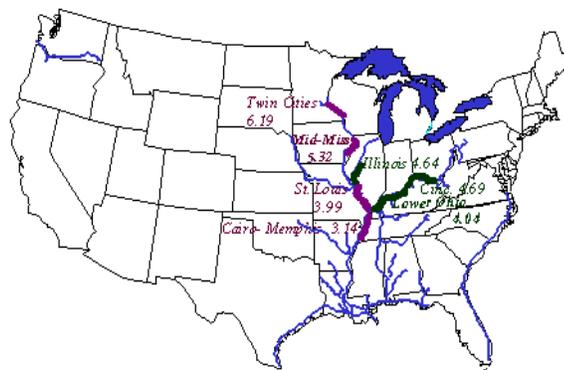
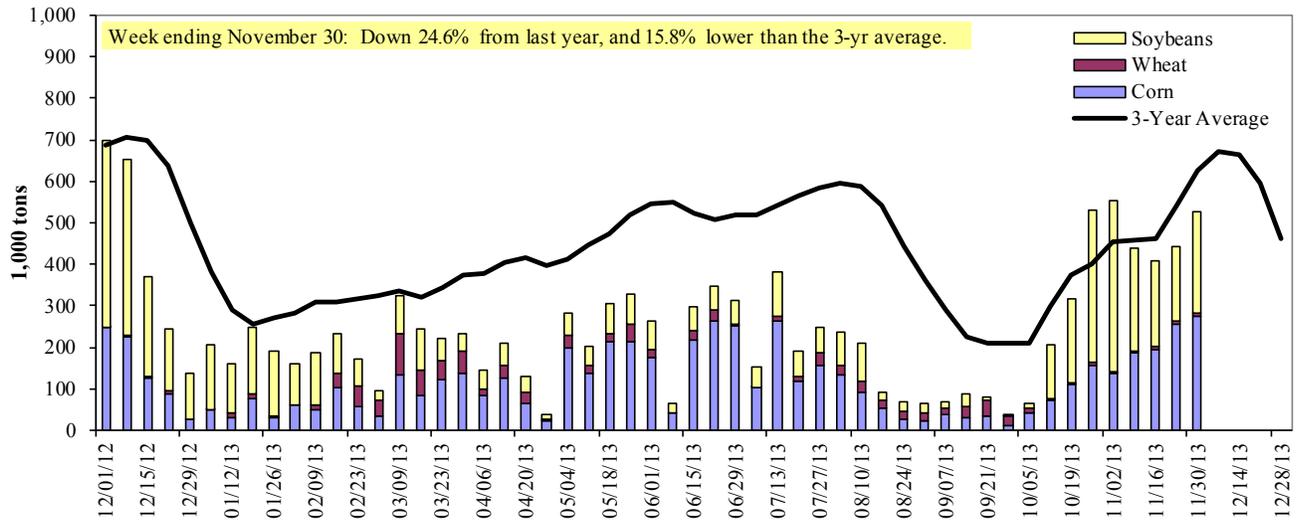


Figure 10

Barge Movements on the Mississippi River¹ (Locks 27 - Granite City, IL)



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

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

Week ending 11/30/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	80	5	199	0	284
Winfield, MO (L25)	162	5	218	0	385
Alton, IL (L26)	305	17	260	0	582
Granite City, IL (L27)	275	8	244	0	527
Illinois River (L8)	114	13	49	0	176
Ohio River (L52)	137	4	164	3	308
Arkansas River (L1)	7	8	53	1	70
Weekly total - 2013	419	20	462	5	905
Weekly total - 2012	301	21	583	2	907
2013 YTD ¹	8,419	4,021	8,400	224	21,063
2012 YTD	14,165	1,721	11,299	227	27,412
2013 as % of 2012 YTD	59	234	74	98	77
Last 4 weeks as % of 2012 ²	141	118	100	318	116
Total 2012	14,837	1,794	12,663	229	29,523

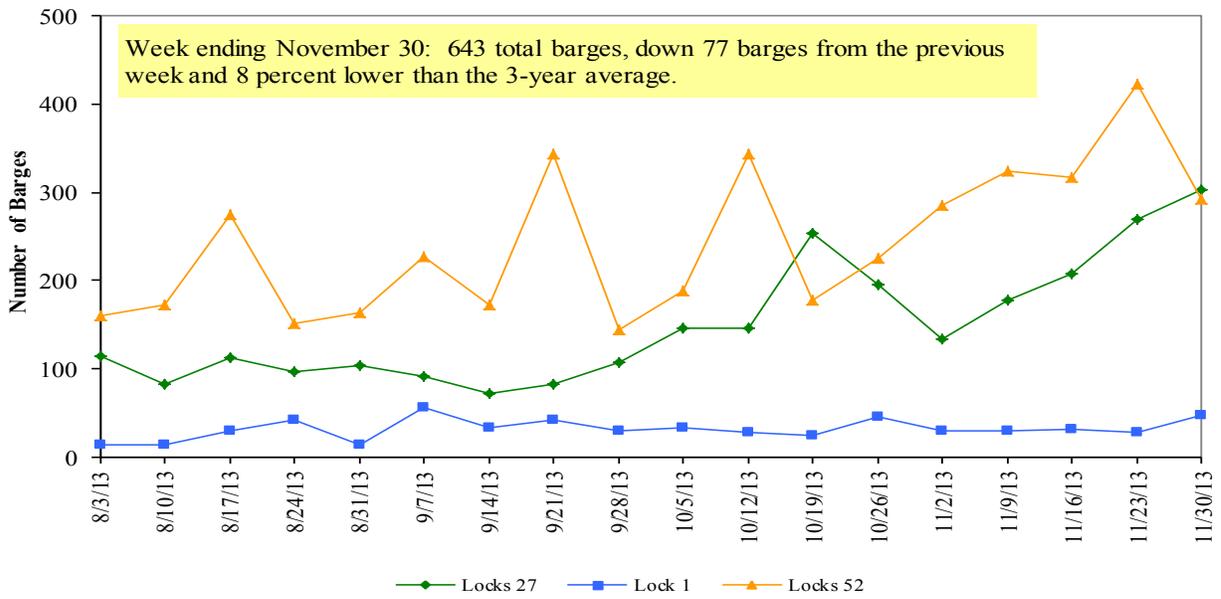
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2012.

Note: Total may not add exactly, due to rounding

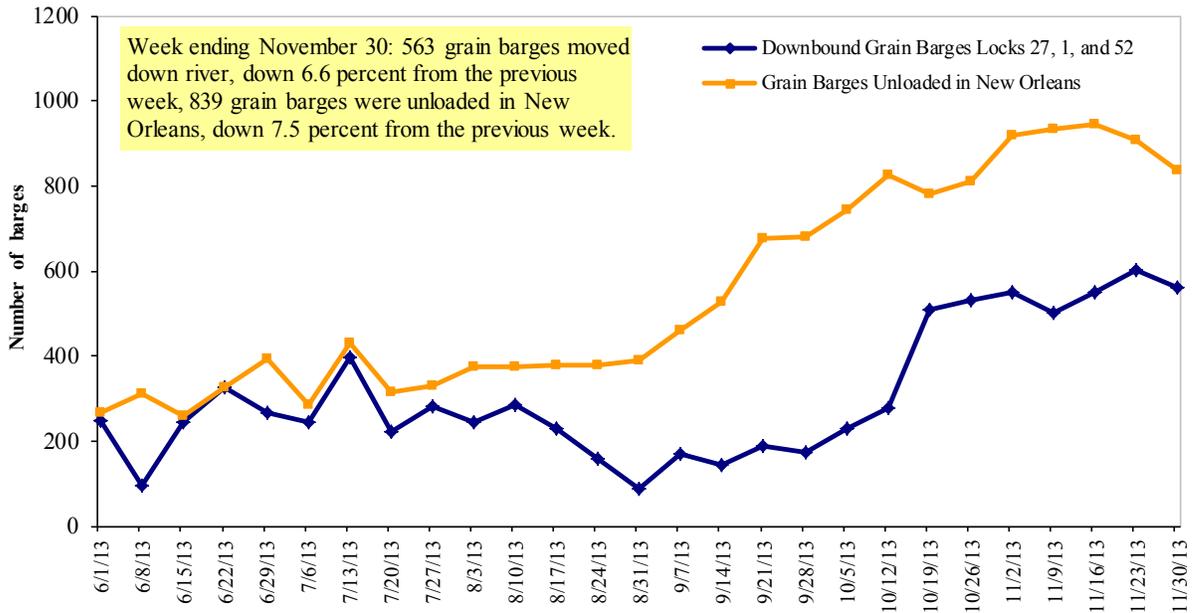
Source: U.S. Army Corps of Engineers

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 Prices¹, Week Ending 12/2/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.906	0.036	-0.190
	New England	4.040	0.037	-0.181
	Central Atlantic	3.949	0.030	-0.253
	Lower Atlantic	3.848	0.040	-0.146
II	Midwest ²	3.879	0.050	-0.135
III	Gulf Coast ³	3.780	0.027	-0.121
IV	Rocky Mountain	3.858	0.021	-0.131
V	West Coast	3.998	0.044	-0.099
	West Coast less California	3.929	0.057	-0.111
	California	4.056	0.033	-0.083
Total	U.S.	3.883	0.039	-0.144

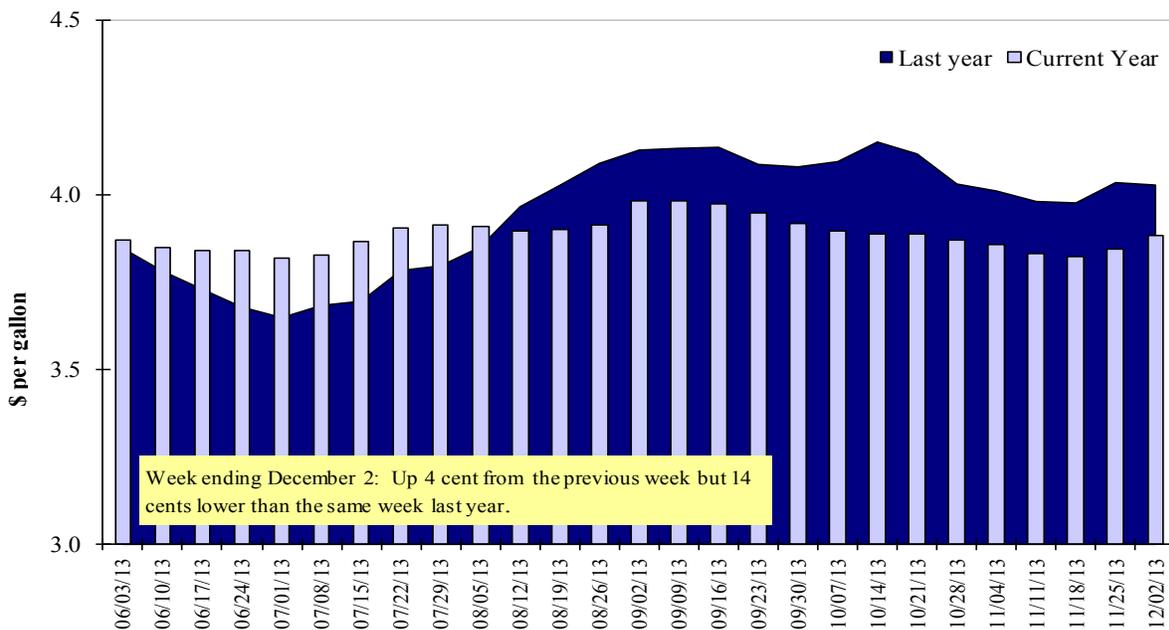
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

²Same as North Central ³Same as South Central

Source: Energy Information Administration/U.S. Department of Energy (www.eia.doe.gov)

Figure 13

Weekly Diesel Fuel Prices, U.S. Average



Source: Retail On-Highway Diesel Prices, Energy Information Administration, Dept. of Energy

Grain Exports

Table 12

U.S. Export Balances and Cumulative Exports (1,000 metric tons)

Week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances¹									
11/21/2013	1,537	1,204	1,647	957	83	5,428	18,347	21,379	45,154
This week year ago	1,446	671	1,246	1,077	45	4,486	7,071	12,414	23,971
Cumulative exports-marketing year²									
2013/14 YTD	6,785	5,154	2,763	2,037	210	16,949	7,059	15,408	39,416
2012/13 YTD	4,694	1,605	2,901	2,173	286	11,659	5,107	14,946	31,712
YTD 2013/14 as % of 2012/13	145	321	95	94	73	145	138	103	124
Last 4 wks as % of same period 2012/13	108	174	119	89	178	117	252	182	190
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 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 Importers¹ of U.S. Corn

Week ending 11/21/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	4,172	3,820	9	7,000
Mexico	6,748	2,776	143	4,370
China	5,300	1,079	391	2,450
Venezuela	227	227	(0)	1,158
Taiwan	390	222	76	512
Top 5 Importers	16,836	8,124	107	15,490
Total US corn export sales	25,407	12,178	109	18,670
% of Projected	71%	65%		
Change from prior week	1,007	236		
Top 5 importers' share of U.S. corn export sales	66%	67%		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 Importers¹ of U.S. Soybeans

Week Ending 11/21/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	23,960	16,533	45	21,522
Mexico	1,430	1,105	29	2,565
Japan	873	872	0	1,751
Indonesia	876	482	82	1,682
Taiwan	819	651	26	1,120
Top 5 importers	27,959	19,643	42	28,641
Total US soybean export sales	36,787	27,262	35	37,060
% of Projected	93%	76%		
Change from prior week	1,315	319		
Top 5 importers' share of U.S. soybean export sales	76%	72%		
USDA forecast, November 2013	39,510	35,960	10	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/>³ FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

Week Ending 11/21/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	1,618	2,159	(25)	3,544
Nigeria	1,850	1,868	(1)	3,002
Mexico	2,102	2,191	(4)	2,761
Philippines	1,253	1,434	(13)	1,965
Egypt	150	168	(11)	1,678
Korea	916	1,117	(18)	1,385
Taiwan	610	725	(16)	1,038
China	4,085	465	779	743
Brazil	3,228	63	5023	527
Colombia	441	398	11	600
Top 10 importers	16,253	10,588	54	17,243
Total US wheat export sales	22,376	16,145	39	26,348
% of Projected	75%	59%		
Change from prior week	562	279		
Top 10 importers' share of U.S. wheat export sales	73%	66%		65%
USDA forecast, November 2013	29,940	27,420	9	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/>³ FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 16

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

Port regions	Week ending 11/28/13	Previous Week ¹	Current Week as % of Previous	2013 YTD ¹	2012 YTD ¹	2013 YTD as % of 2012 YTD	Last 4-weeks as % of		Total ¹ 2012
							2012	3-yr. avg.	
Pacific Northwest									
Wheat	149	121	123	10,678	11,964	89	82	78	12,625
Corn	328	225	146	2,128	5,290	40	322	119	5,512
Soybeans	191	505	38	8,054	9,557	84	141	159	10,347
Total	668	851	79	20,860	26,811	78	144	128	28,484
Mississippi Gulf									
Wheat	133	81	165	9,419	5,192	181	159	148	5,462
Corn	403	400	101	13,062	17,249	76	172	94	18,068
Soybeans	933	1,049	89	17,579	21,799	81	117	129	24,684
Total	1,470	1,530	96	40,061	44,240	91	129	120	48,215
Texas Gulf									
Wheat	123	123	100	8,530	5,466	156	279	108	5,912
Corn	0	0	n/a	163	336	49	0	0	336
Soybeans	60	15	389	788	467	169	305	110	626
Total	183	139	132	9,482	6,268	151	286	96	6,874
Interior									
Wheat	17	10	168	984	1,165	85	128	43	1,218
Corn	174	142	123	3,446	5,978	58	132	139	6,115
Soybeans	55	76	72	2,918	3,939	74	223	120	4,204
Total	246	228	108	7,349	11,082	66	40	122	11,538
Great Lakes									
Wheat	0	8	0	745	444	168	201	48	481
Corn	0	0	n/a	0	56	0	n/a	0	56
Soybeans	93	22	428	556	562	99	196	271	713
Total	93	30	311	1,301	1,061	123	197	132	1,250
Atlantic									
Wheat	0	0	n/a	645	341	189	n/a	47	341
Corn	2	3	63	229	139	165	n/a	271	143
Soybeans	102	107	95	1,240	1,140	109	115	130	1,460
Total	103	110	94	2,115	1,620	131	128	133	1,944
U.S. total from ports²									
Wheat	422	343	123	31,002	24,571	126	132	95	26,040
Corn	907	769	118	19,029	29,048	66	223	105	30,230
Soybeans	1,434	1,774	81	31,135	37,464	83	127	136	42,035
Total	2,764	2,887	96	81,167	91,082	89	142	121	98,305

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

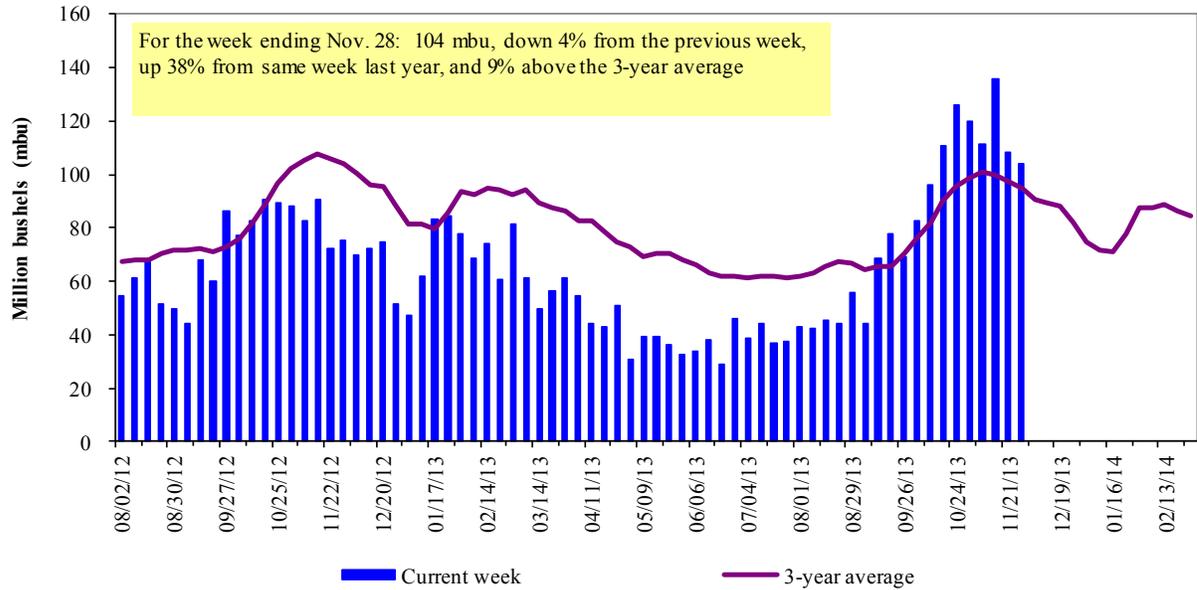
² Total includes only port regions shown above; Interior land-based shipments now included.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 56 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2012.

Figure 14

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

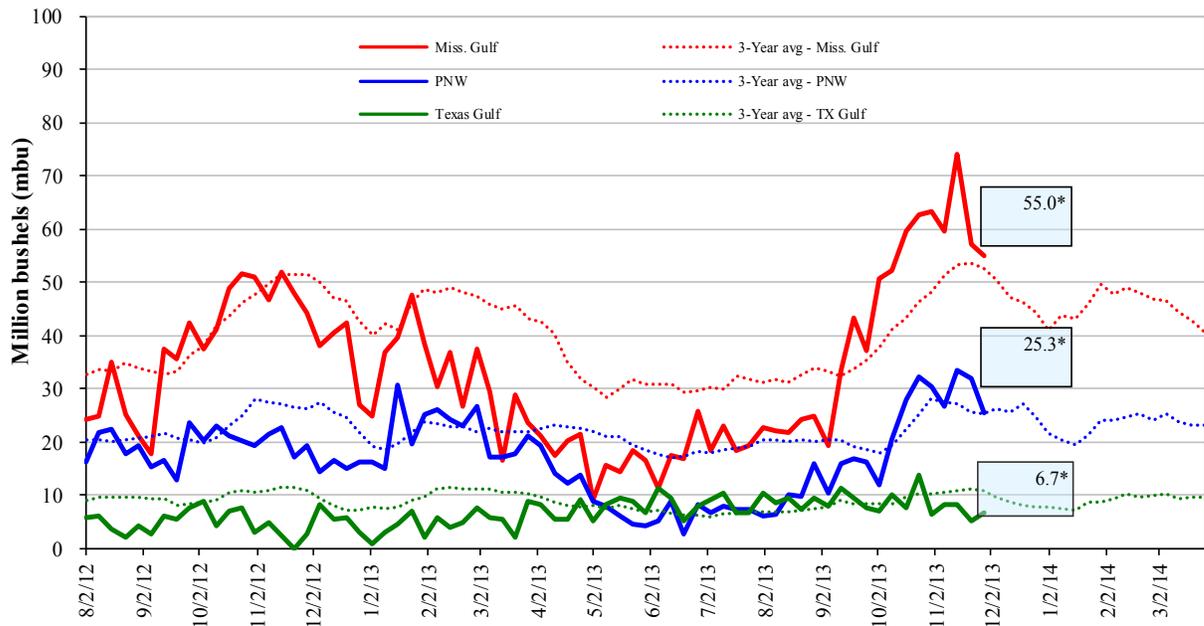


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW¹ (wheat, corn, and soybeans)



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

Nov. 28: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 4	up 32	down 1	down 20
Last year (same week)	up 25	up 160	up 32	up 32
3-yr avg (4-wk mov. avg)	up 7	down 9	up 5	up 8

Ocean Transportation

Table 17

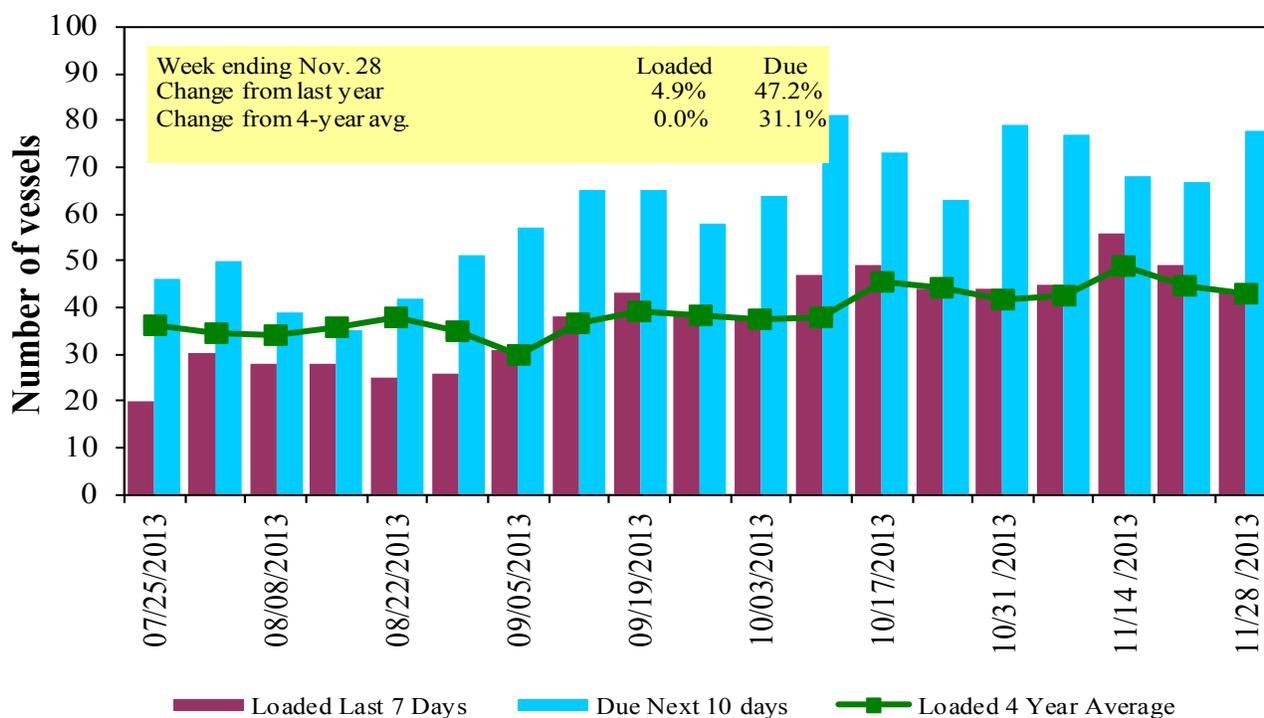
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
11/28/2013	47	43	78	n/a	n/a
11/21/2013	57	49	67	19	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. Gulf¹ Vessel Loading Activity

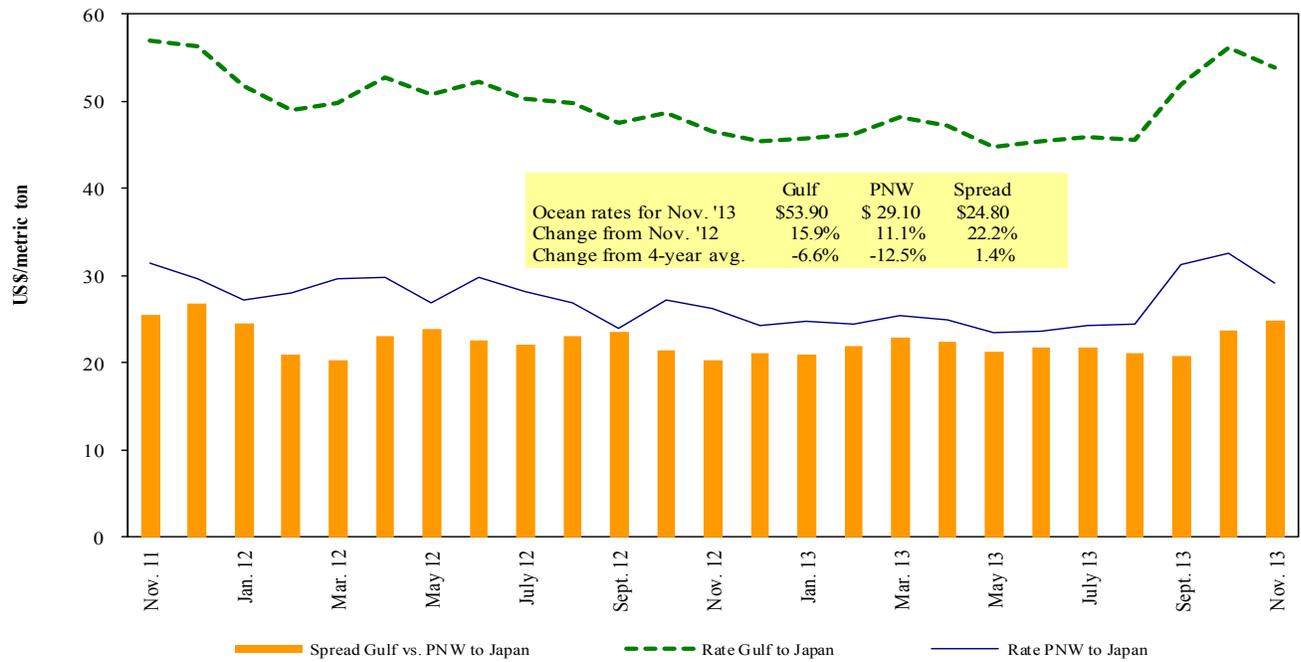


Source: Transportation & Marketing Programs/AMS/USDA

¹U.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 11/30/2013

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 15/30	55,000	47.50
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-Dec	55,000	49.50
U.S. Gulf	Djibouti ¹	Wheat	Dec 16/26	35,880	125.62
U.S. Gulf	S. Korea	Heavy Grain	Dec 5/20	58,000	54.00
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	Heavy Grain	Dec 10/20	25,000	27.50
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

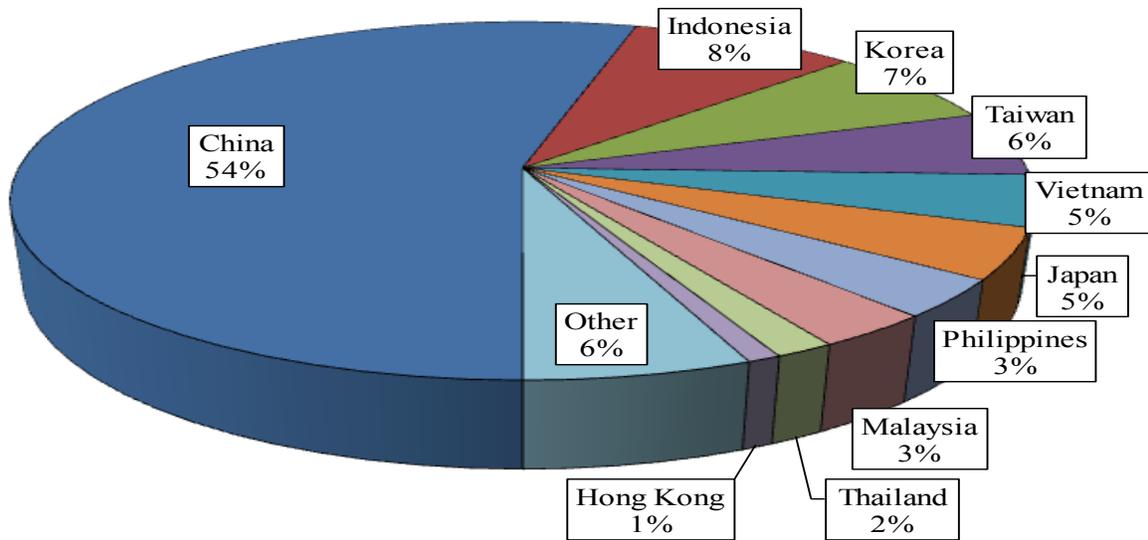
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

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

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

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

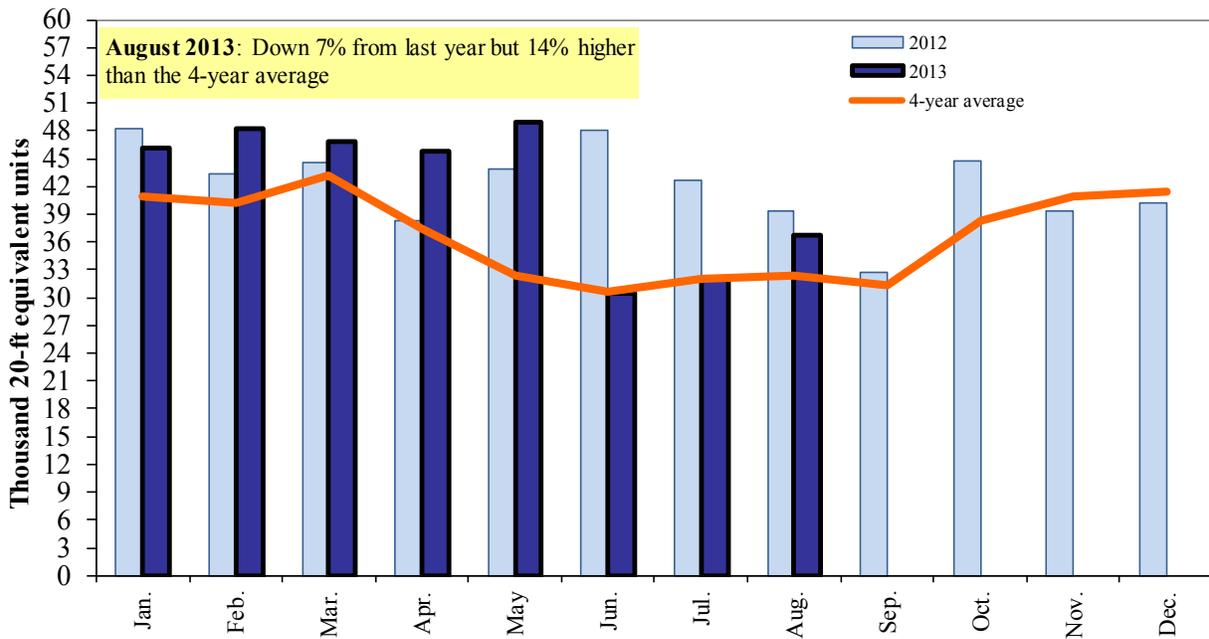
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, August 2013



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.

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Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report*. December 5, 2013. Web: <http://dx.doi.org/10.9752/TS056.12-05-2013>

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