



SOY TRANSPORTATION COALITION

FARM TO MARKET: A SOYBEAN'S JOURNEY

Rail Carloading Situation for Grains and Soybeans

The most current data on rail is available through calendar year 2013. Informa converted the data to a crop marketing year (September/August) through 2012/13. This section includes highlights of key rail factors that have emerged.

- The drought of 2012/13 drastically impacted grain carloadings which dropped to 979 thousand carloadings. Since that time grain carloadings have increased to 1.2 million carloadings.
- The industry has been transitioning from smaller trains that hauled relatively shorter distances using smaller cars, to an industry with more cars per train on longer hauls using larger cubic capacity cars through shuttle train programs. This is particularly notable given the percentage of tonnage moved by trains larger than 100 cars, which increased from 32 percent in 2010/12 to 38 percent in 2012/13.
- The transition has developed as crop production has expanded north and westward into the western Corn Belt, where corn and soybeans are supplanting wheat area.
- Meanwhile, ethanol production has increased corn production, but fewer surpluses, in key states like Iowa. As ethanol production reaches its ceiling in the next few years, shuttle trains should continue to increase the average rail distances of corn as the surplus corn is transported to export and feeding positions.
- Grain carloadings peaked at 1.7 million in 2005/06, and fell below 1.5 million in 2008/09 and slightly increased in 2009/10 before dropping below 1.0 million in the drought of 2012/13.
- More than one-third of the trains exceed 100 cars, up from less than 15% in 2003; one-third had less than 25 cars per train, down from 45% in 1996.
- Carloadings expanded in the western Corn Belt from 400,080 in 2004/05 to 437,187 in 2004/06, but have steadily declined since; from eastern Corn Belt carloadings have increased from 280,423 in 2004/05 to above 400,000 in 2006/07.
- Carloading destinations increased to export position for the PNW with up to 394,699 carloadings in 2009/10 before declining the following two years. Carloadings to the Texas and Oklahoma region have steadily increased since the



SOY TRANSPORTATION COALITION

FARM TO MARKET: A SOYBEAN'S JOURNEY

mid-1990s and are now total more than 260,000 carloadings; and to the Southwest and Southeast regions hover near 100,000 carloads each.

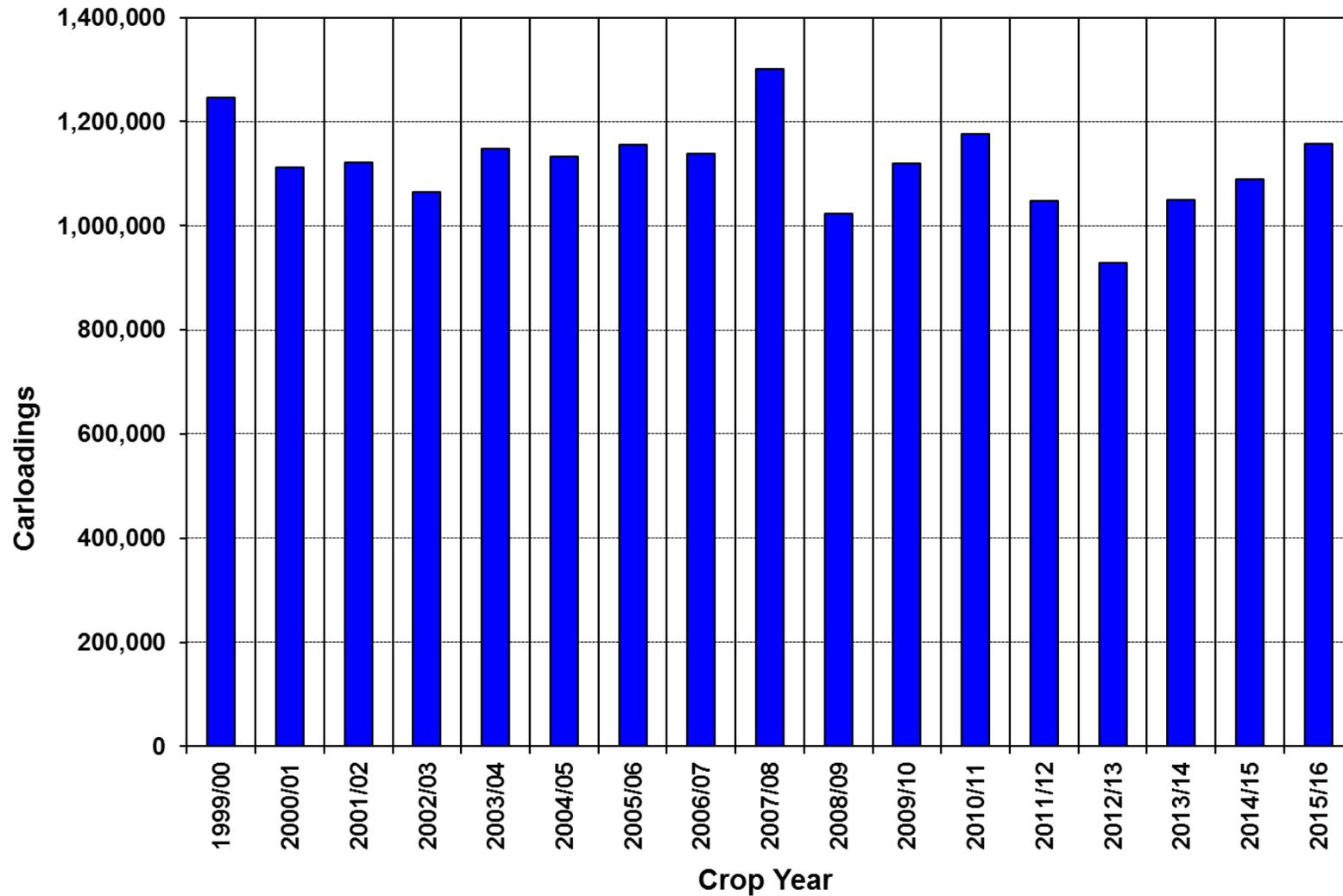
- The average distance grain and soybeans were moved increased from less than 800 miles in 2002/03 to more than 900 miles starting in 2007/08 and reached 935 in 2008/09 on increased moves to export position, but fell slightly below 900 in 2009/2010 and hit 895 miles in 2012/13.
- The size of railcars was consistently expanding with larger cubic capacity cars (those exceeding 5,000 cubic feet) up until 2010/11 and has dropped since then. In 2010/11, there were 978,826 carloadings above 5,000 cubic feet but that fell to 772,653 by 2012/13.
- The larger cars can haul more volume, increasing from 96.2 tons per car in 1995/96 to more than 100 tons in 2005/06, and in 2012/13 were nearly 105 tons.
- With increased miles and heavier loaded cars, total ton-miles have expanded from 107.8 billion in 1997/98 to 171.6 billion in 2007/08 and in 2012/13 had fallen to 115.5 billion ton-miles.



SOY TRANSPORTATION COALITION

FARM TO MARKET: A SOYBEAN'S JOURNEY

Total Grain and Soybean Rail Carloadings

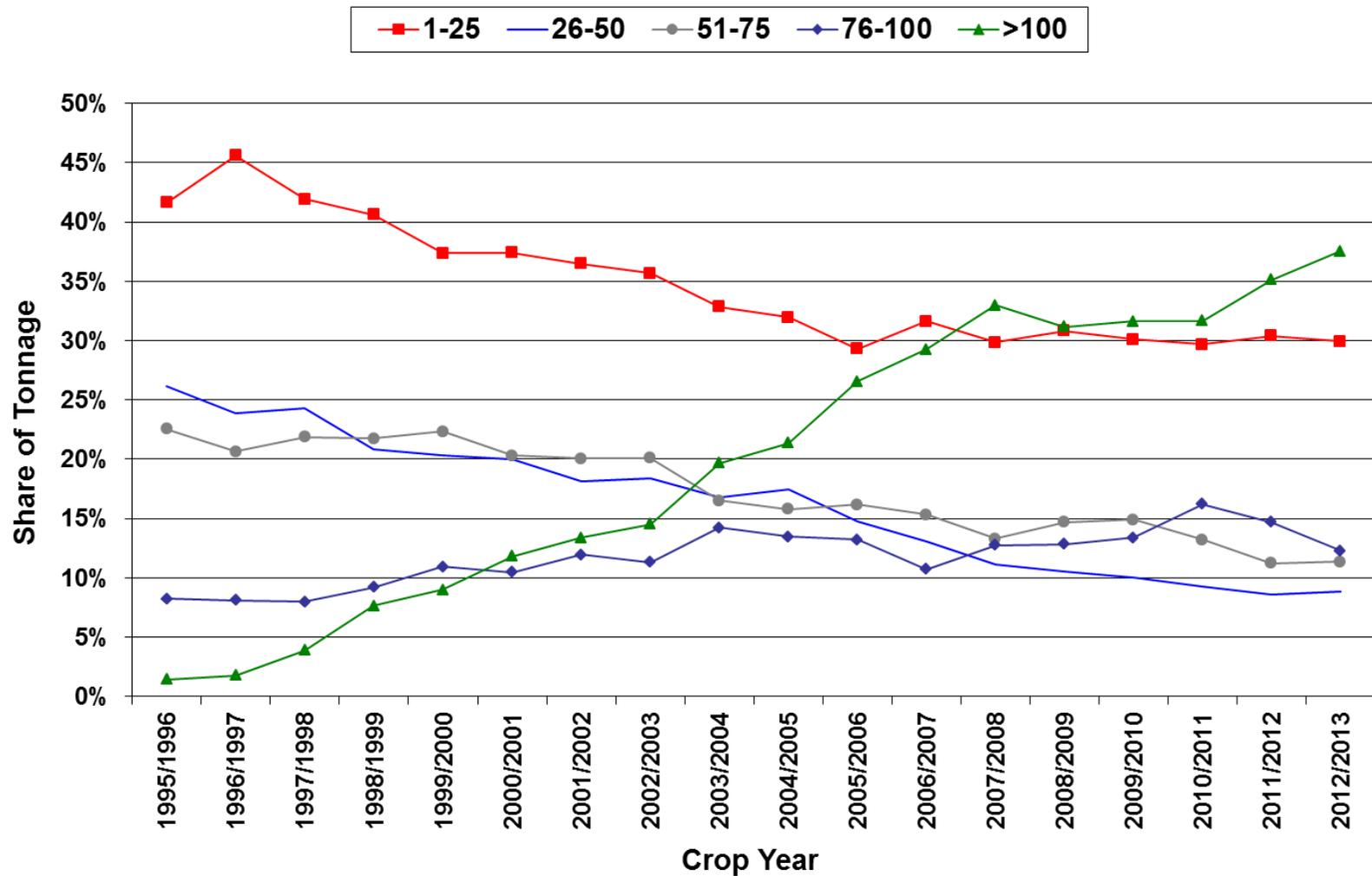




SOY TRANSPORTATION COALITION

FARM TO MARKET: A SOYBEAN'S JOURNEY

Grain and Soybean Tonnage Moved by Train Size

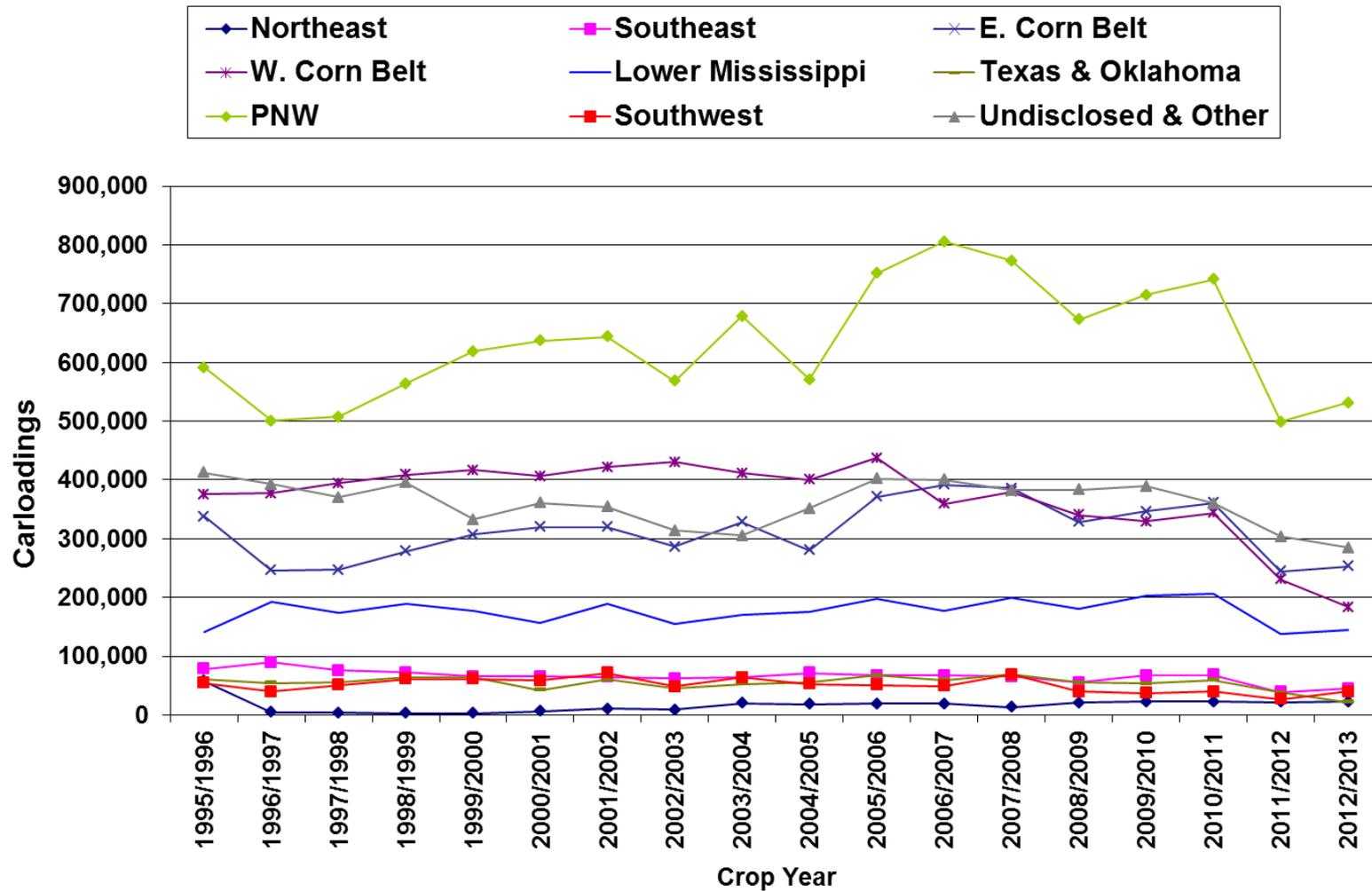




SOY TRANSPORTATION COALITION

FARM TO MARKET: A SOYBEAN'S JOURNEY

Grain and Soybean Rail Carloading Origins

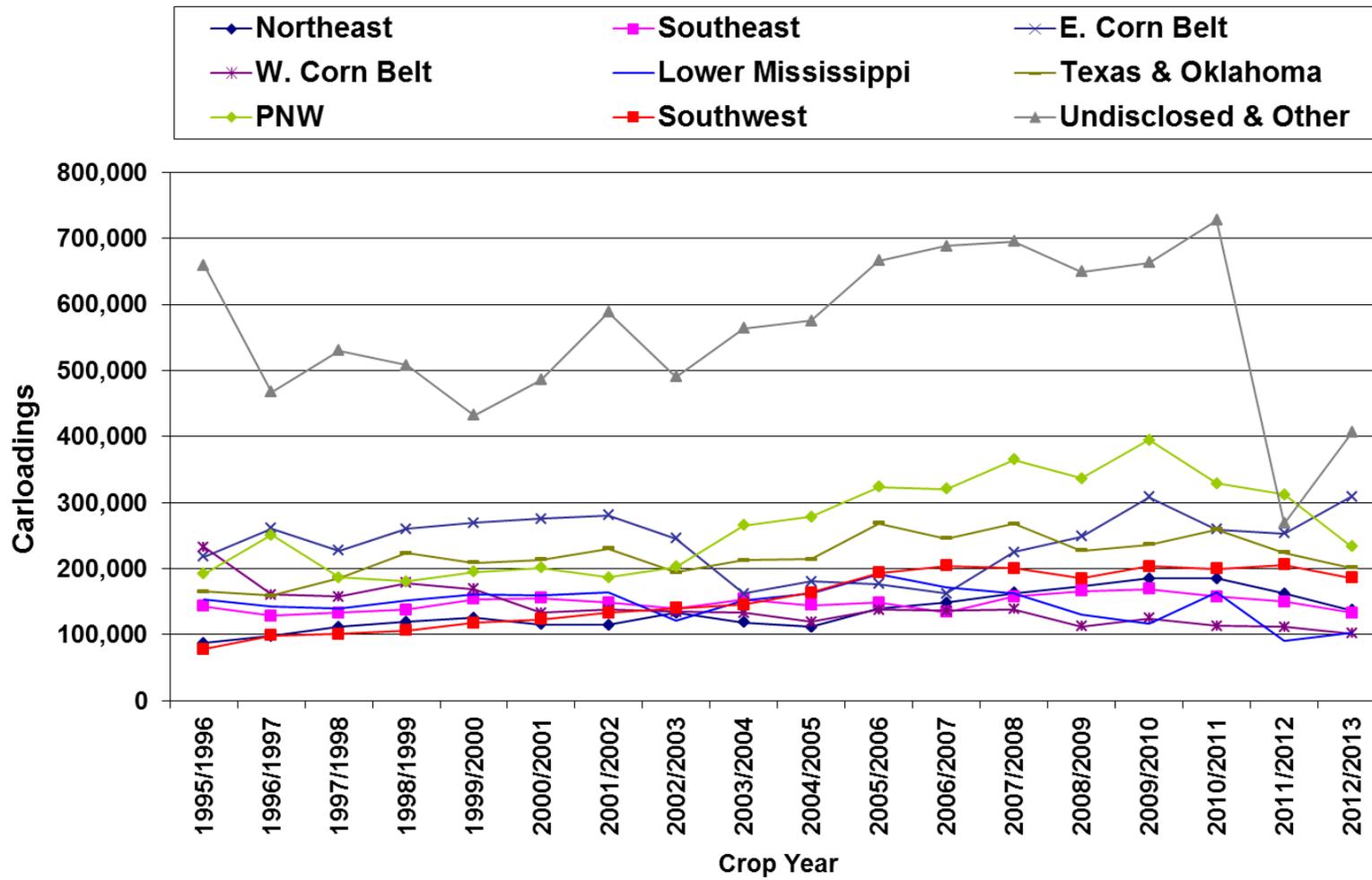




SOY TRANSPORTATION COALITION

FARM TO MARKET: A SOYBEAN'S JOURNEY

Grain and Soybean Rail Carloading Destinations

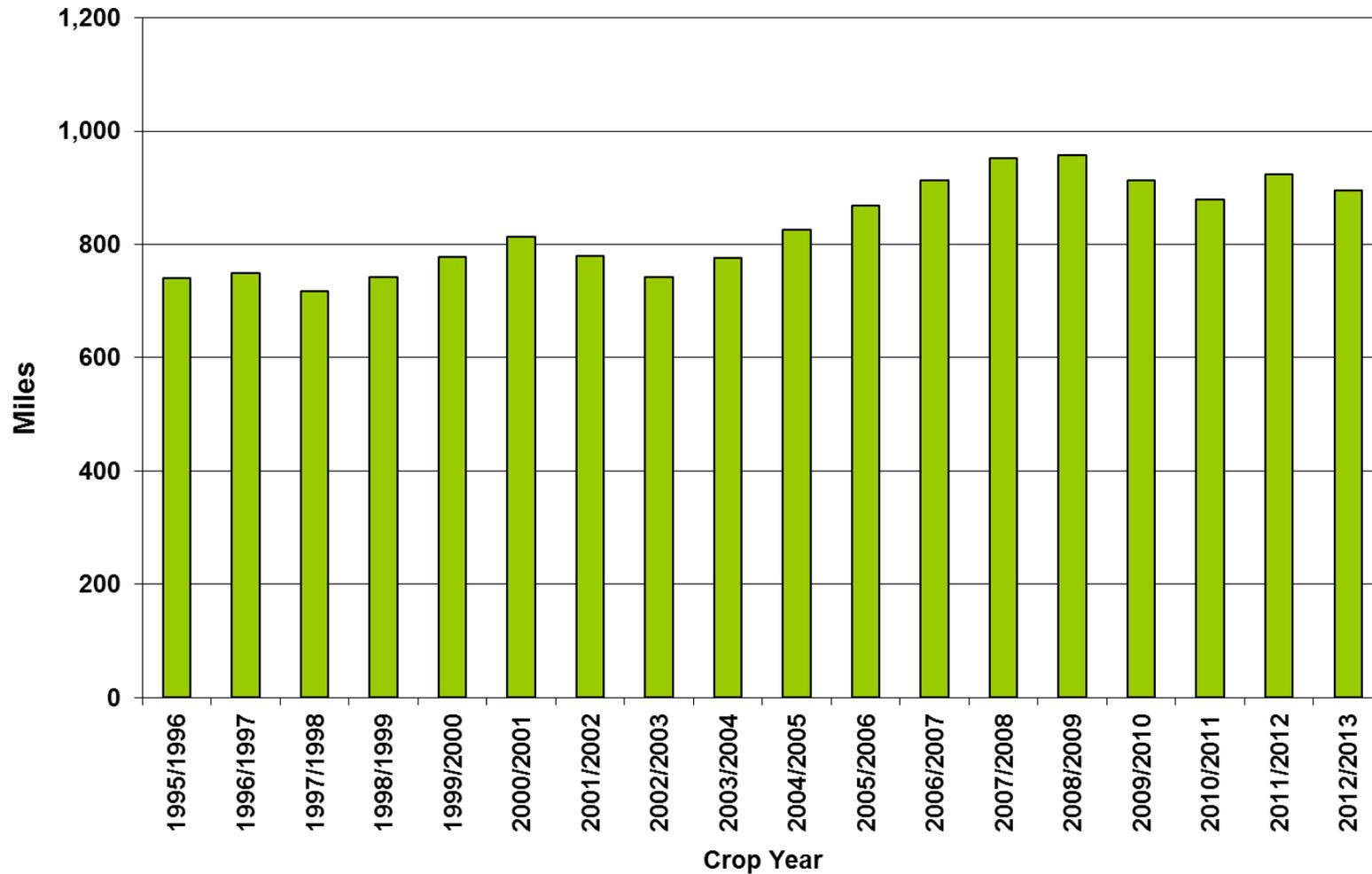




SOY TRANSPORTATION COALITION

FARM TO MARKET: A SOYBEAN'S JOURNEY

Grain and Soybeans Average Rail Miles Transported

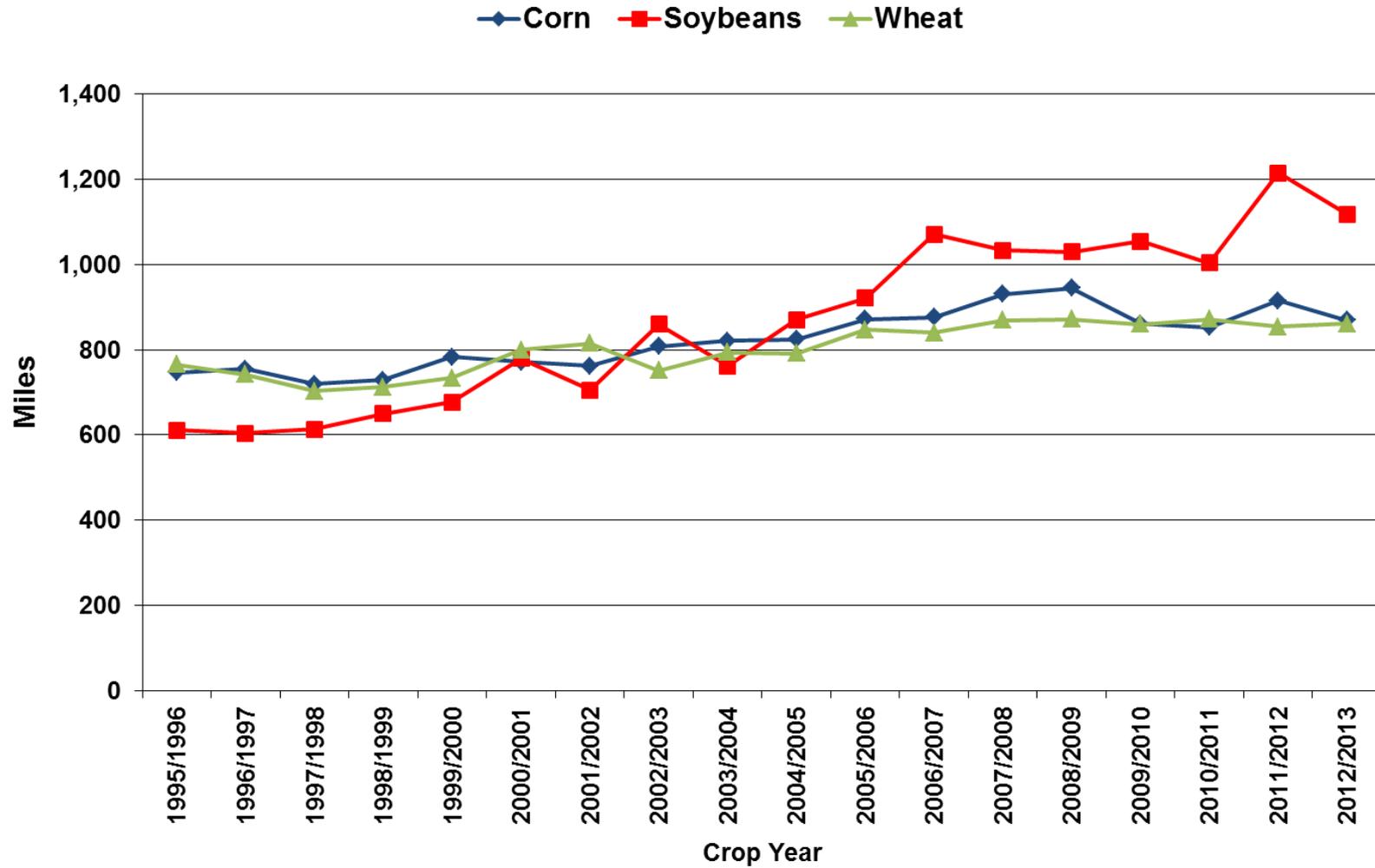




SOY TRANSPORTATION COALITION

FARM TO MARKET: A SOYBEAN'S JOURNEY

Grain and Soybeans Average Rail Miles Transported, by Crop

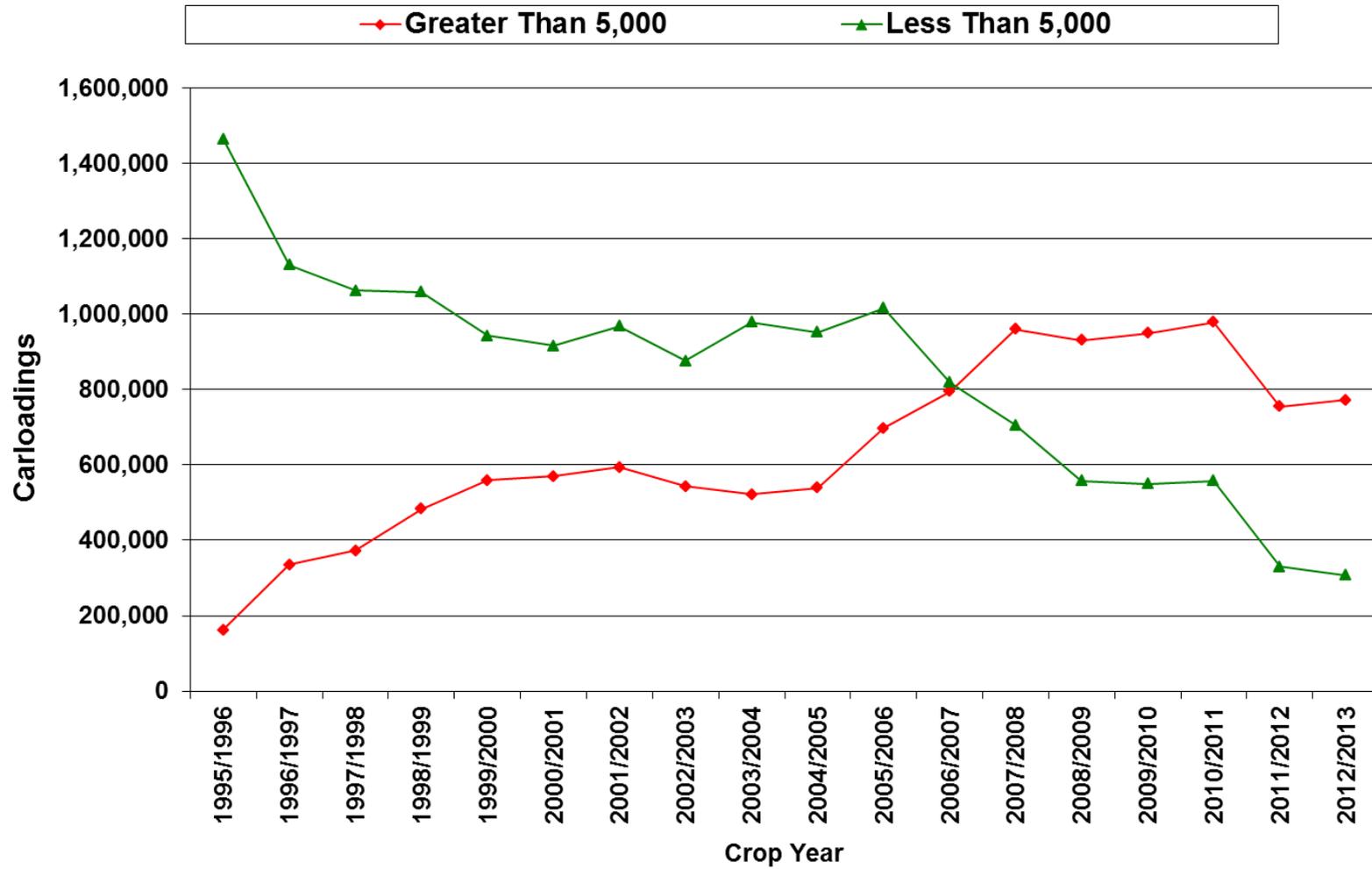




SOY TRANSPORTATION COALITION

FARM TO MARKET: A SOYBEAN'S JOURNEY

Grain and Soybean Rail Carloadings by Railcar Cubic Capacity

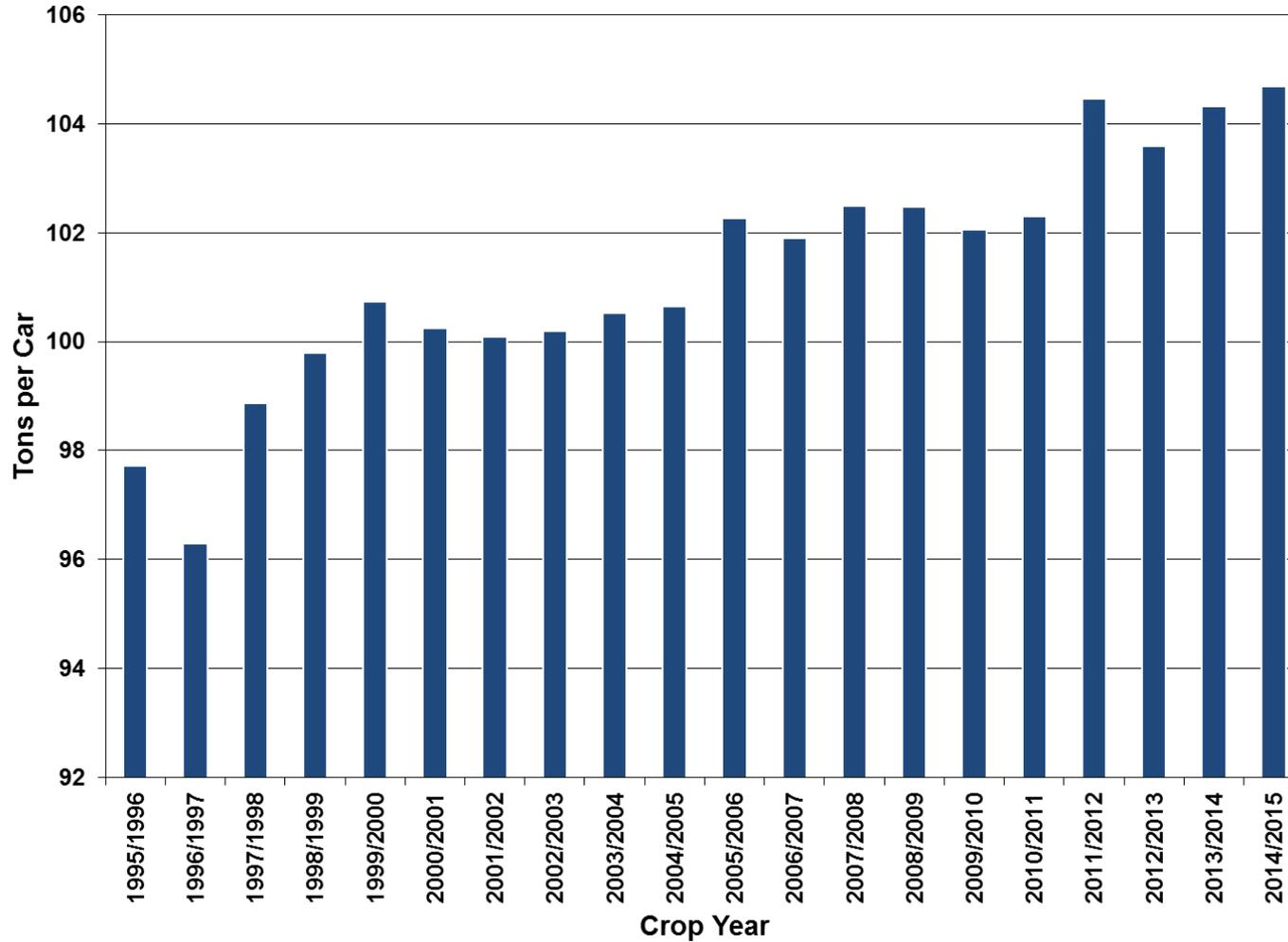




SOY TRANSPORTATION COALITION

FARM TO MARKET: A SOYBEAN'S JOURNEY

Average Grain and Soybean Tons per Railcar

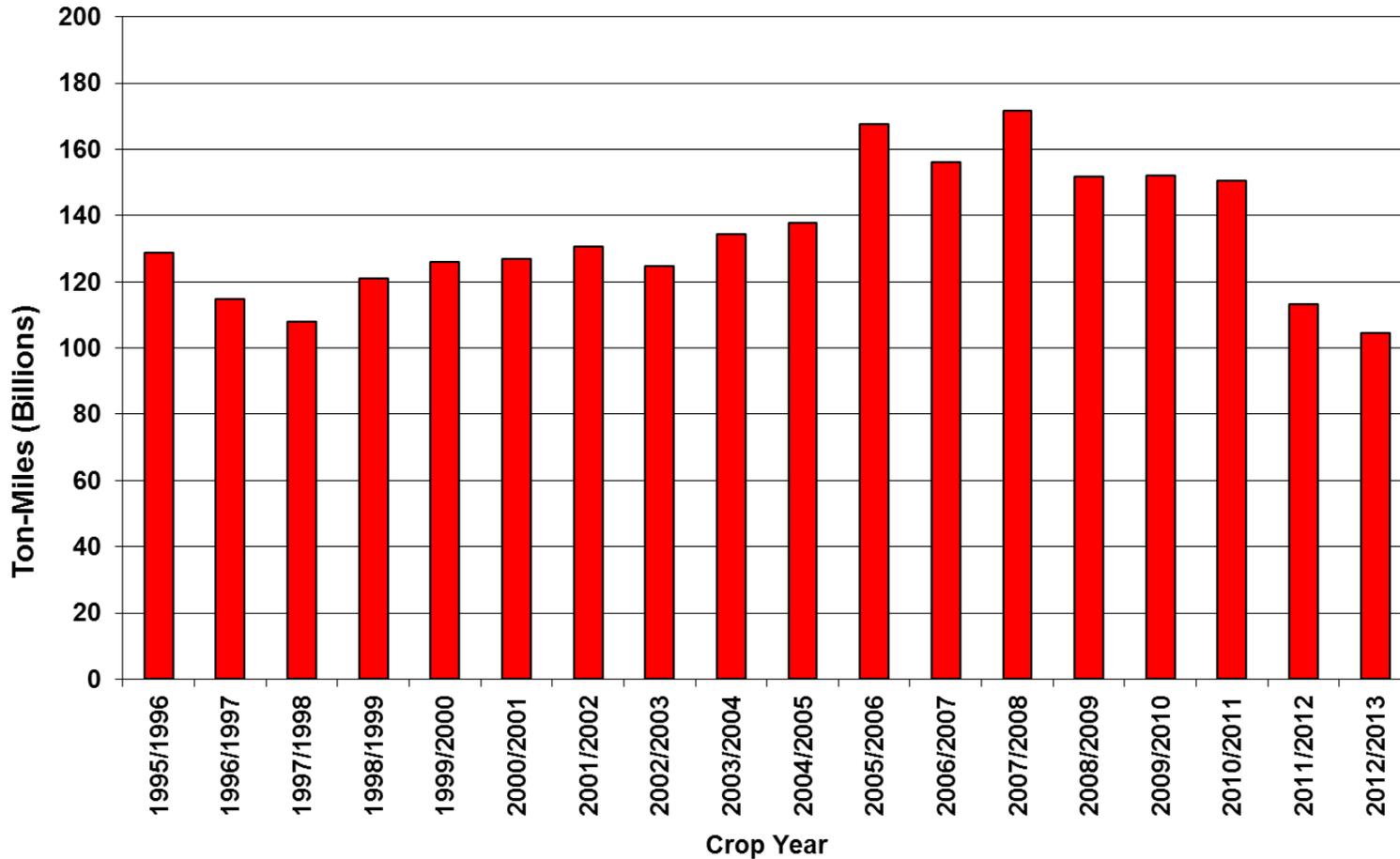




SOY TRANSPORTATION COALITION

FARM TO MARKET: A SOYBEAN'S JOURNEY

Grain and Soybeans Rail Ton-Miles



"Farm to Market: A Soybean's Journey" can be accessed at www.unitedsoybean.org or www.soytransportation.org

Funded by the Soybean Checkoff

