



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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January 11, 2018

WEEKLY HIGHLIGHTS

Contents

Article/
Calendar

Grain
Transportation
Indicators

Rail

Barge

Truck

Exports

Ocean

Brazil

Mexico

Grain Truck/Ocean
Rate Advisory

Datasets

Specialists

Subscription
Information

The next
release is
January 18 2018

Diesel Prices Hit \$3.00 Per Gallon

During the week ending January 8, diesel prices averaged \$3.00 per gallon at retail sales. The last time the Energy Information Agency reported diesel prices above \$3.00 per gallon was on the week ending January 12, 2015. Over the last 3 years, weekly averages for U.S. diesel prices fluctuated in between \$3.05 and \$1.98 per gallon. This week, average **diesel fuel prices** increased 2 cents from the previous week—to \$3.00 per gallon—which is 40 cents above the same week last year, 82 cents above the same week two years ago, and 1 cent below the same week three years ago.

Grain Inspections Continue to Recede

For the week ending January 4, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 1.28 million metric tons (mmt), down 41 percent from the previous week, down 33 percent from the same time last year, and 51 percent below the 3-year average. Inspections of each of the three major grains were down significantly from the previous week, with the largest drop in wheat (72 percent). The declines were due in part to a significant slowdown in barge and rail movements of grain following the holidays. Pacific Northwest (PNW) inspections decreased 55 percent from the past week, and Mississippi Gulf grain inspections decreased 29 percent for the same period. Outstanding (unshipped) export sales were up slightly for wheat but down for soybeans and corn.

Low Water and Ice Impacting Barge Traffic

Low water and ice are delaying barge traffic on the Mississippi River at St. Louis and between St. Louis and Cairo, IL. For the week ending January 6, downbound grain shipments at Mississippi River Locks 27 were 68 thousand tons, about 71 percent below the 3-year average for the first week of the year. Rock pinnacle removal activities between St. Louis and Cairo have been halted due to ice accumulations in the river. Barge traffic on the Ohio River has been delayed by operational difficulties at Locks and Dam 52. Illinois River shipments are slow, as barge operators are dealing with extreme ice issues. American Commercial Barge Line (ACBL) reports that their normal Illinois River tows of 15 barges have been reduced to 6 or 9 barges. Based upon the current forecast, ACBL does not anticipate returning to normal tow sizes for another 30 days.

Weekly Grain Carloadings End 2017 on Low Volume

For the week ending December 30, U.S. Class I railroads originated 15,713 **grain carloads**, down 30 percent from the previous week, 20 percent from last year, and 18 percent from the 3-year average. Weekly grain carloadings typically decrease during the end-of-year holiday week, but they were at their lowest level in five years, compared to 13,305 carloadings in 2012 when grain production was reduced following the severe drought. In addition to grain, the Association of American Railroads reported that weekly carloadings across all other commodity categories were down compared to the same week last year.

Snapshots by Sector

Export Sales

For the week ending December 28, **unshipped balances** of wheat, corn, and soybeans totaled 34.5 mmt, down 15 percent from the same time last year. Net weekly **wheat export sales** were .132 mmt, down 72 percent from the previous week. Net **corn export sales** were .101 mmt, down 92 percent from the previous week, and net **soybean export sales** were .554 mmt for the same period, down 43 percent from the previous week.

Rail

Average January shuttle **secondary railcar** bids/offers per car were \$225 above tariff for the week ending January 4, up \$92 from last week, and \$433 lower than last year. Average non-shuttle secondary railcar bids/offers per car were \$0, \$25 higher than last year. There were no non-shuttle bids/offers last week.

Barge

For the week ending January 6, **barge grain movements** totaled 211,290 tons, 66 percent lower than the previous week, and down 68 percent from the same period last year.

For the week ending January 6, 141 grain barges **moved down river**, down 65 percent from last week, 816 grain barges were **unloaded in New Orleans**, 9 percent lower than the previous week.

Ocean

For the week ending January 4, 37 **ocean-going grain vessels** were loaded in the Gulf, 16 percent less than the same period last year. Forty-seven vessels are expected to be loaded within the next 10 days, 40 percent less than the same period last year.

For the week ending January 4, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$43 per metric ton. The cost of shipping from the PNW to Japan was \$24 per metric ton.

Fourth Quarter 2017 Grain Inspections Below Last Year

According to the Grain Inspection, Packers, and Stockyards Administration (GIPSA), total inspections of grain (wheat, corn, and soybeans) shipped from major U.S. ports reached 38 million metric tons (mmt) during the fourth quarter of 2017 (see figure 1). Total inspections of grain during the fourth quarter were 21 percent below the same quarter last year and 3 percent below the 5-year average, due in part to increased export competition from abroad. Grain transportation demand was also slower than expected during the fourth quarter, with lower shipments to Asia and Latin America.

Gulf: According to GIPSA, U.S. Gulf fourth quarter grain inspections reached 21 mmt, down 26 percent from last year and 10 percent below the 5-year average (see figure 1). Inspections of corn, soybeans, and wheat were down in the U.S. Gulf, with corn dropping 37 percent due to less demand from Asia. Rail deliveries of grain to the U.S. Gulf decreased 51 percent, and barge grain movements on the Mississippi River decreased 22 percent from the fourth quarter last year. Ocean freight rates, however, for shipping grain through the Gulf increased 11 percent from the third quarter 2017 and 29 percent from the fourth quarter last year.

Pacific Northwest: Fourth quarter Pacific Northwest (PNW) grain inspections reached 10.9 mmt, 16 percent below last year, but 7 percent above the 5-year average. Fourth quarter PNW corn inspections dropped 59 percent from last year during the same quarter, and PNW soybean inspections decreased 15 percent. Wheat inspections in the PNW, however, increased 9 percent, reaching 2.6 mmt. Rail deliveries of grain to the PNW decreased 15 percent from last year during the fourth quarter.

As in the Gulf, fourth quarter ocean freight rates for shipping grain from the PNW were 19 percent above the third quarter 2017 and 33 percent above the fourth quarter last year.

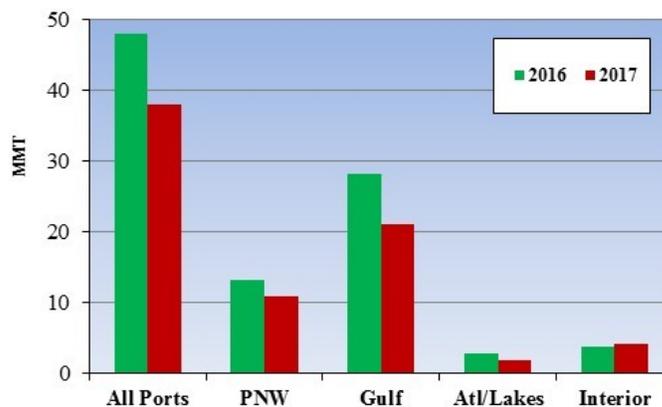
Great Lakes: Fourth quarter Atlantic-Great Lakes grain inspections reached 1.8 mmt, down 35 percent from last year and 24 percent below the 5-year average.

Interior: Fourth-quarter Interior grain inspections reached a record 4.1 mmt, up 8 percent from last year and 30 percent above the 5-year average. Fourth quarter Interior corn and soybean inspections increased 16 and 8 percent, respectively from last year, as shipments to Mexico increased. Lower Mexican demand for wheat caused Interior wheat inspections to decrease 32 percent from below last year.

Corn, Soybean and Wheat Inspections Down

Total inspections of corn reached 7.4 mmt during the fourth quarter, down 33 percent from last year and 8 percent below the 5-year average (see figure 2). PNW corn inspections dropped to .692 mmt, down 59 percent from last year due to decreased demand from Asia. U.S. corn inspections in the Gulf reached 4.6 mmt, down 37 percent from last year and 15 percent below the 5-year average. Atlantic-Great Lakes corn inspections reached .038 mmt, down 87 percent from last year and the lowest since 2012. Interior corn inspections were the third highest on record. Total corn exports for the 2017/18 marketing year are forecast to decrease 16 percent from 2016/17, according to the December [World Agricultural Supply and Demand Estimates \(WASDE\) report](#).

Figure 1: Fourth Quarter Grain Inspections, by Port Region



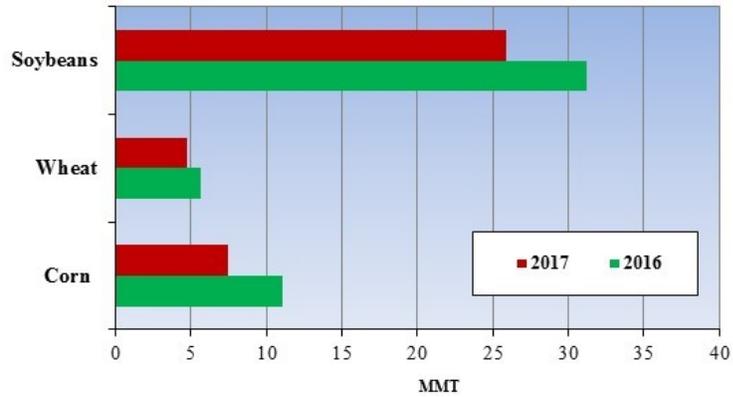
Source: USDA/GIPSA

Fourth quarter soybean inspections reached 25.8 mmt, down 17 percent from last year and 1 percent below the 5-year average (see figure 2). Inspections of soybeans to Asia decreased 22 percent from last year, with shipments destined to China decreasing 23 percent from a year ago. U.S. Gulf soybean inspections reached 14.7 mmt, down 21 percent from last year and 6 percent below the 5-year average. However, PNW soybean inspections reached 7.6 mmt, which is 15 percent

below last year but 9 percent above the 5-year average. Soybeans inspections for the Atlantic-Great Lakes totaled 1.5 mmt, down 20 percent from last year and 14 percent below the 5-year average. Interior soybean inspections reached a record 1.8 mmt, up 8 percent from last year and 24 percent above the 5-year average. According to the December WASDE estimate, soybean exports for the 2017/18 marketing year are expected to increase 3 percent from the past year.

Fourth quarter wheat inspections reached 4.7 mmt, down 17 percent from last year and 9 percent below the 5-year average (see figure 2). Gulf wheat inspections reached 1.7 mmt, down 22 percent from the previous year due to falling demand from Asia and Africa. PNW wheat inspections reached 2.7 mmt, up 9 percent from last year and 12 percent above the 5-year average. Fourth quarter Atlantic-Great Lakes wheat inspections totaled .197 mmt, down 61 percent from last year. Interior wheat inspections (.397 mmt) increased 44 percent for the same period. For the 2017/18 marketing year, the December WASDE estimates total wheat exports are expected to decrease 8 percent from the previous year.
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Figure 2: Fourth Quarter Grain Inspections, by Types



Source: USDA, GIPSA

Rail Transportation

Table 3

Rail Deliveries to Port (carloads)¹

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
01/03/2018 ^P	339	857	3,260	86	4,542	12/30/2017	1,453
12/27/2017 ^r	194	616	5,419	276	6,505	12/23/2017	2,173
2018 YTD ^r	339	857	3,260	86	4,542	2017 YTD	1,453
2017 YTD ^r	907	1,948	5,285	773	8,913	2016 YTD	2,511
2018 YTD as % of 2017 YTD	37	44	62	11	51	% change YTD	58
Last 4 weeks as % of 2017 ²	44	52	97	33	77	Last 4wks % 2016	104
Last 4 weeks as % of 4-year avg. ²	36	69	105	34	84	Last 4wks % 4 yr	112
Total 2017	28,766	76,045	289,178	21,999	415,988	Total 2017	119,661
Total 2016	36,925	87,863	299,606	29,007	453,401	Total 2016	92,982

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2016 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.

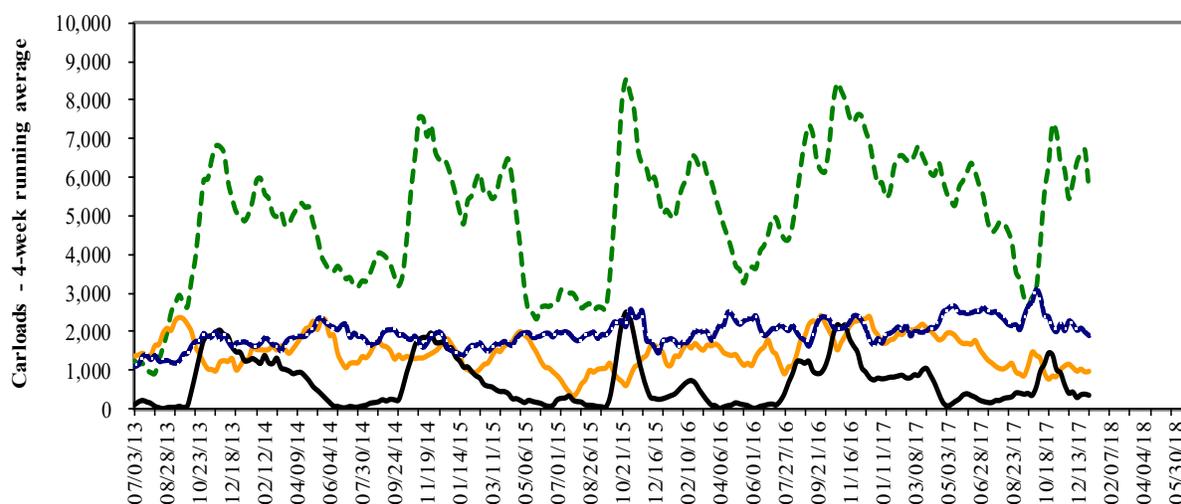
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 24 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail Deliveries to Port



--- Pacific Northwest: 4 wks. ending 1/03--down 3% from same period last year; up 5% from 4-year average
--- Texas Gulf: 4 wks. ending 1/03--down 48% from same period last year; down 31% from the 4-year average
--- Miss. River: 4 wks. ending 1/03--down 56% from same period last year; down 64% from 4-year average
--- Cross-border: 4 wks. ending 12/30--up 4% from same period last year; up 12% from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

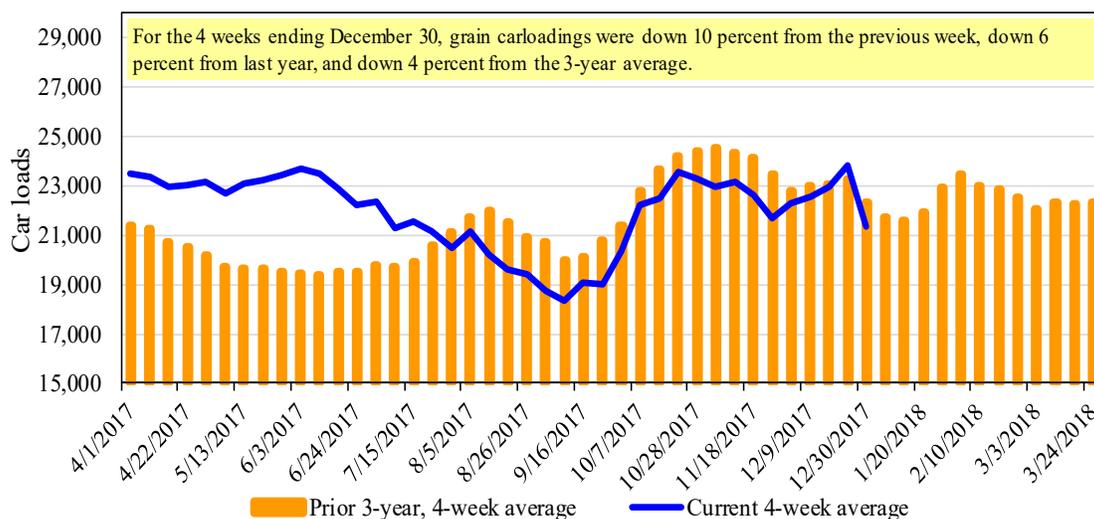
For the week ending: 12/30/2017	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,259	1,745	8,295	480	3,934	15,713	3,054	3,070
This week last year	1,675	2,196	10,671	410	4,600	19,552	3,115	4,107
2017 YTD	89,465	142,719	578,964	50,223	289,574	1,150,945	198,783	244,766
2016 YTD	95,179	150,953	590,779	45,246	300,836	1,182,993	193,530	234,884
2017 YTD as % of 2016 YTD	94	95	98	111	96	97	103	104
Last 4 weeks as % of 2016*	89	89	100	97	85	94	94	106
Last 4 weeks as % of 3-yr avg.**	82	85	104	103	89	96	87	102
Total 2016	95,179	150,953	590,779	45,246	300,836	1,182,993	193,530	234,884

*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**The past 4 weeks as a percent of the same period from 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

For the week ending: 1/4/2018		Delivery period							
		Jan-18	Jan-17	Feb-18	Feb-17	Mar-18	Mar-17	Apr-18	Apr-17
BNSF ³	COT grain units	n/a	15	n/a	1	n/a	no bids	n/a	no bids
	COT grain single-car ⁵	n/a	144	n/a	60	n/a	34	n/a	7
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.

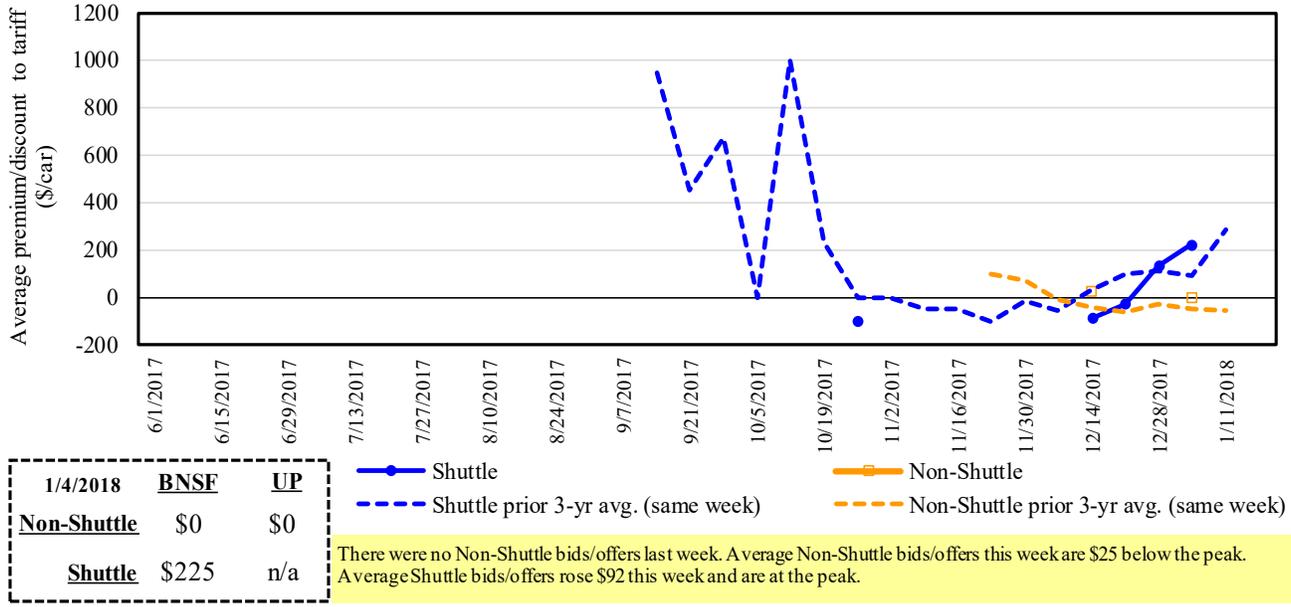
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

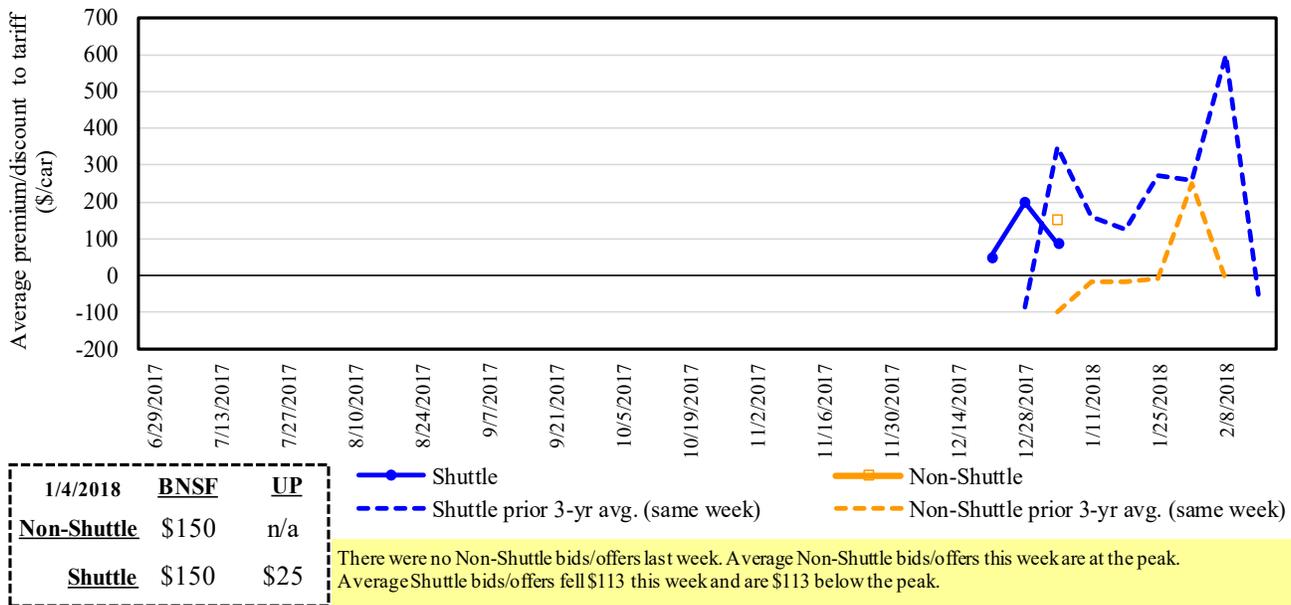
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4
Bids/Offers for Railcars to be Delivered in January 2018, Secondary Market



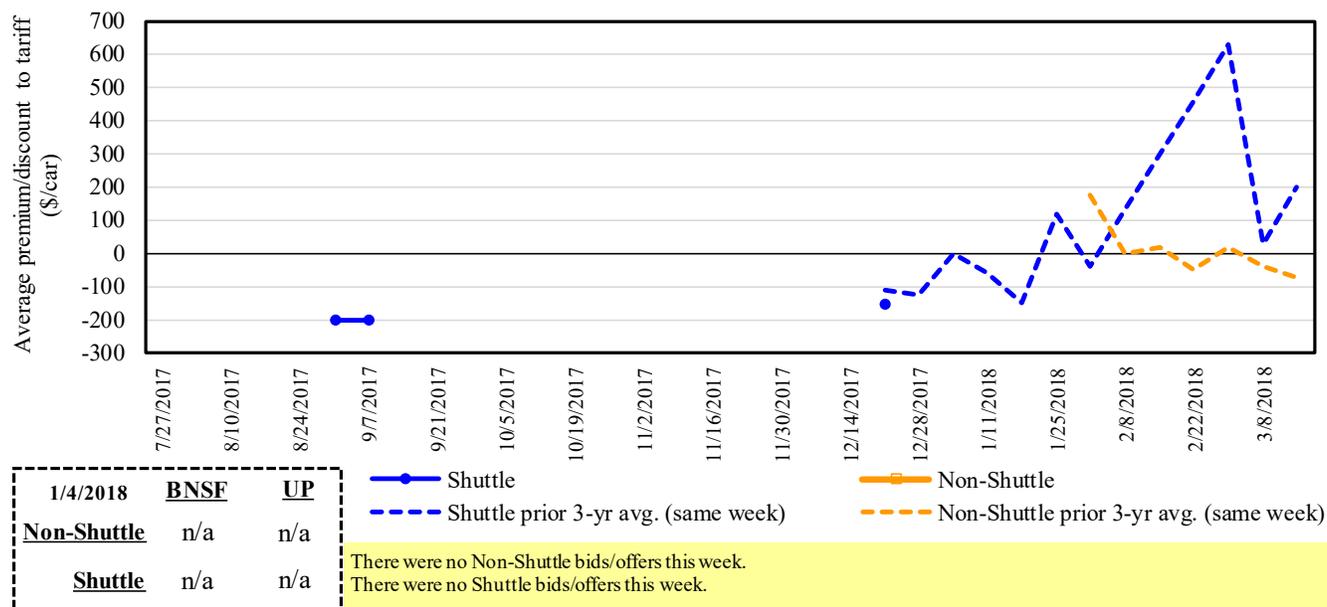
Non-shuttle bids include unit-train and single-car bids. n/a = not available.
 Source: Transportation & Marketing Programs/AMS/USDA

Figure 5
Bids/Offers for Railcars to be Delivered in February 2018, 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 March 2018, 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

For the week ending: 1/4/2018		Delivery period					
		Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18
Non-shuttle	BNSF-GF	0	150	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 2017	0	n/a	n/a	n/a	n/a	n/a
	UP-Pool	0	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 2017	50	n/a	n/a	n/a	n/a	n/a	
Shuttle	BNSF-GF	225	150	n/a	n/a	n/a	n/a
	Change from last week	0	(50)	n/a	n/a	n/a	n/a
	Change from same week 2017	(1042)	(750)	n/a	n/a	n/a	n/a
	UP-Pool	n/a	25	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 2017	n/a	n/a	n/a	n/a	n/a	n/a	

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

The **tariff rail rate** is the base price of freight rail service, and together with **fuel surcharges** and any **auction and secondary rail** values constitute the full cost of shipping by rail. Typically, auction and secondary rail values are a small fraction of the full cost of shipping by rail relative to the tariff rate. High auction and secondary rail values, during times of high rail demand or short supply, can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

January, 2018	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ⁴	
					metric ton	bushel ²		
Unit train								
Wheat	Wichita, KS	St. Louis, MO	\$3,883	\$86	\$39.41	\$1.07	4	
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$0	\$41.14	\$1.12	0	
	Wichita, KS	Los Angeles, CA	\$7,050	\$0	\$70.01	\$1.91	1	
	Wichita, KS	New Orleans, LA	\$4,540	\$151	\$46.59	\$1.27	5	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,786	\$0	\$67.39	\$1.83	1	
	Northwest KS	Galveston-Houston, TX	\$4,816	\$166	\$49.47	\$1.35	5	
	Amarillo, TX	Los Angeles, CA	\$5,021	\$231	\$52.15	\$1.42	6	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,931	\$171	\$40.74	\$1.03	9	
	Toledo, OH	Raleigh, NC	\$6,344	\$0	\$63.00	\$1.60	5	
	Des Moines, IA	Davenport, IA	\$2,258	\$36	\$22.78	\$0.58	1	
	Indianapolis, IN	Atlanta, GA	\$5,446	\$0	\$54.08	\$1.37	5	
	Indianapolis, IN	Knoxville, TN	\$4,540	\$0	\$45.08	\$1.15	5	
	Des Moines, IA	Little Rock, AR	\$3,609	\$106	\$36.90	\$0.94	4	
	Des Moines, IA	Los Angeles, CA	\$5,327	\$310	\$55.98	\$1.42	6	
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,631	\$156	\$37.61	\$1.02	3	
	Toledo, OH	Huntsville, AL	\$5,287	\$0	\$52.50	\$1.43	5	
	Indianapolis, IN	Raleigh, NC	\$6,460	\$0	\$64.15	\$1.75	5	
	Indianapolis, IN	Huntsville, AL	\$4,764	\$0	\$47.31	\$1.29	5	
	Champaign-Urbana, IL	New Orleans, LA	\$4,745	\$171	\$48.82	\$1.33	8	
Shuttle Train								
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$0	\$39.26	\$1.07	0	
	Wichita, KS	Galveston-Houston, TX	\$4,171	\$0	\$41.42	\$1.13	2	
	Chicago, IL	Albany, NY	\$5,663	\$0	\$56.24	\$1.53	3	
	Grand Forks, ND	Portland, OR	\$5,611	\$0	\$55.72	\$1.52	0	
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	\$0	\$58.90	\$1.60	0	
	Northwest KS	Portland, OR	\$5,812	\$272	\$60.42	\$1.64	6	
	Minneapolis, MN	Portland, OR	\$5,000	\$0	\$49.65	\$1.26	0	
Corn	Sioux Falls, SD	Tacoma, WA	\$4,960	\$0	\$49.26	\$1.25	0	
	Champaign-Urbana, IL	New Orleans, LA	\$3,731	\$171	\$38.75	\$0.98	10	
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	0	
	Des Moines, IA	Amarillo, TX	\$3,970	\$134	\$40.75	\$1.04	4	
	Minneapolis, MN	Tacoma, WA	\$5,000	\$0	\$49.65	\$1.26	0	
	Council Bluffs, IA	Stockton, CA	\$4,820	\$0	\$47.86	\$1.22	2	
	Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,600	\$0	\$55.61	\$1.51	0
		Minneapolis, MN	Portland, OR	\$5,650	\$0	\$56.11	\$1.53	0
		Fargo, ND	Tacoma, WA	\$5,500	\$0	\$54.62	\$1.49	0
		Council Bluffs, IA	New Orleans, LA	\$4,775	\$197	\$49.38	\$1.34	8
Toledo, OH		Huntsville, AL	\$4,352	\$0	\$43.22	\$1.18	3	
Grand Island, NE	Portland, OR	\$5,710	\$278	\$59.47	\$1.62	7		

¹A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally 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 and soybeans 60 lbs./bu.

³Regional economic areas are defined by the Bureau of Economic Analysis (BEA)

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

Table 8

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

Date: January, 2018			Fuel				Percent change ⁴
Commodity	Origin state	Destination region	Tariff rate/car ¹	surcharge per car ²	Tariff plus surcharge per:		
					metric ton ³	bushel ³	Y/Y
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,631	\$118	\$68.96	\$1.87	1
	KS	Guadalajara, JA	\$7,309	\$269	\$77.42	\$2.10	2
	TX	Salinas Victoria, NL	\$4,292	\$72	\$44.59	\$1.21	2
Corn	IA	Guadalajara, JA	\$8,313	\$248	\$87.47	\$2.22	2
	SD	Celaya, GJ	\$7,700	\$0	\$78.68	\$2.00	2
	NE	Queretaro, QA	\$8,013	\$244	\$84.38	\$2.14	3
	SD	Salinas Victoria, NL	\$6,743	\$0	\$68.90	\$1.75	2
	MO	Tlalnepantla, EM	\$7,379	\$238	\$77.83	\$1.98	3
	SD	Torreon, CU	\$7,300	\$0	\$74.59	\$1.89	2
Soybeans	MO	Bojay (Tula), HG	\$8,134	\$230	\$85.47	\$2.32	-6
	NE	Guadalajara, JA	\$8,692	\$253	\$91.39	\$2.48	-2
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	0
	KS	Torreon, CU	\$7,489	\$188	\$78.43	\$2.13	1
Sorghum	NE	Celaya, GJ	\$7,345	\$231	\$77.40	\$1.96	3
	KS	Queretaro, QA	\$7,819	\$148	\$81.40	\$2.07	4
	NE	Salinas Victoria, NL	\$6,452	\$119	\$67.13	\$1.70	5
	NE	Torreon, CU	\$6,790	\$182	\$71.23	\$1.81	4

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

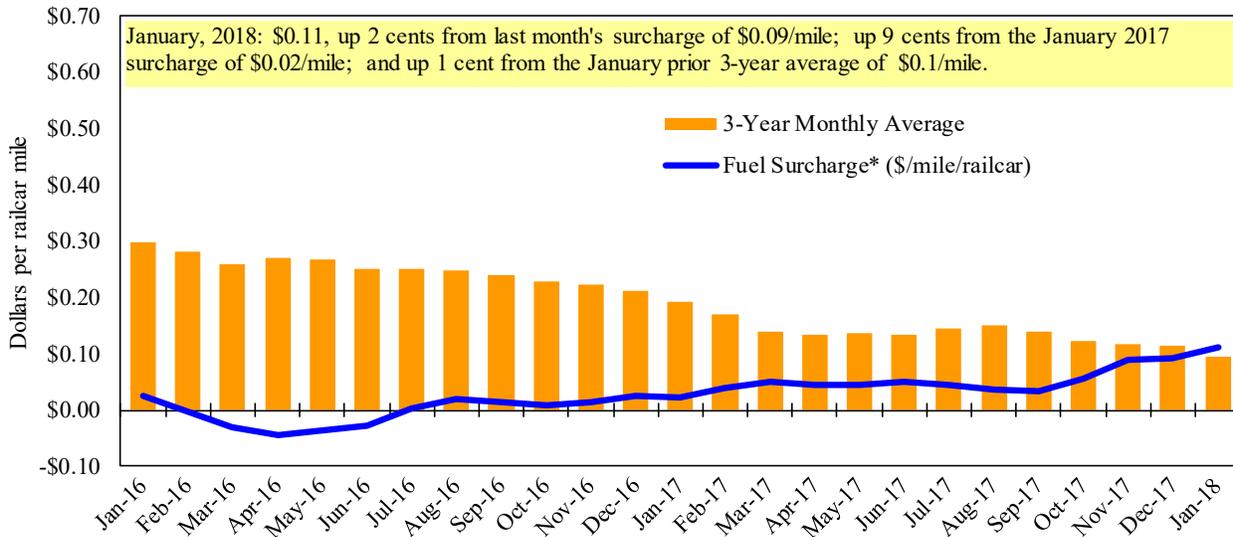
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

⁴Percentage change 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.

* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

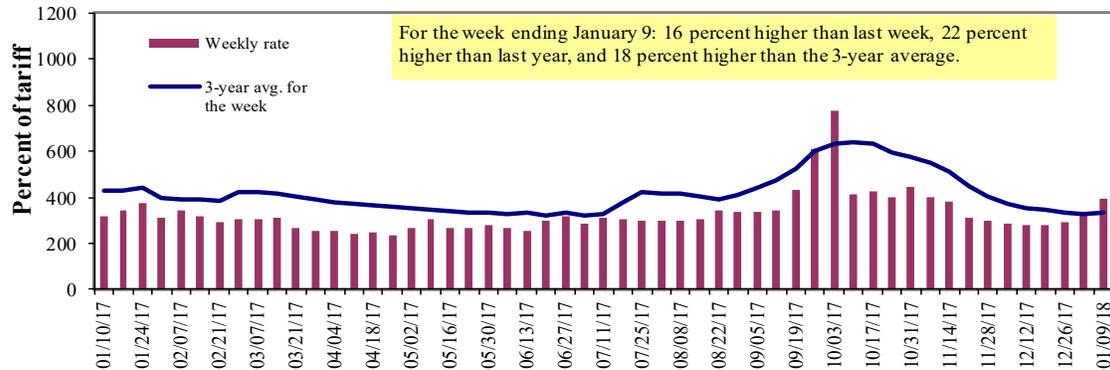
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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
Rate ¹	1/9/2018	-	-	392	275	287	287	188
	1/2/2018	-	-	338	243	263	263	185
\$/ton	1/9/2018	-	-	18.19	10.97	13.46	11.59	5.90
	1/2/2018	-	-	15.68	9.70	12.33	10.63	5.81
Current week % change from the same week:								
	Last year	-	-	22	29	22	22	0
	3-year avg. ²	-	-	18	29	3	3	3
Rate ¹	February	-	-	340	240	268	268	183
	April	350	295	288	220	225	225	180

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; "-" = closed

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

(Rate * 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.

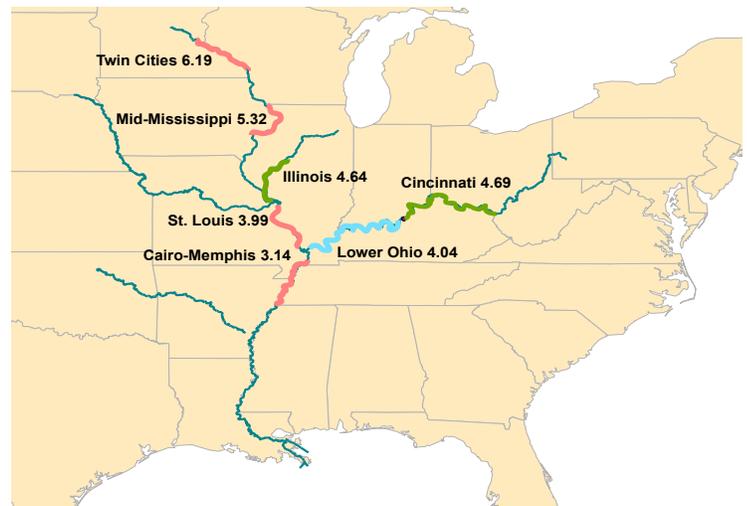
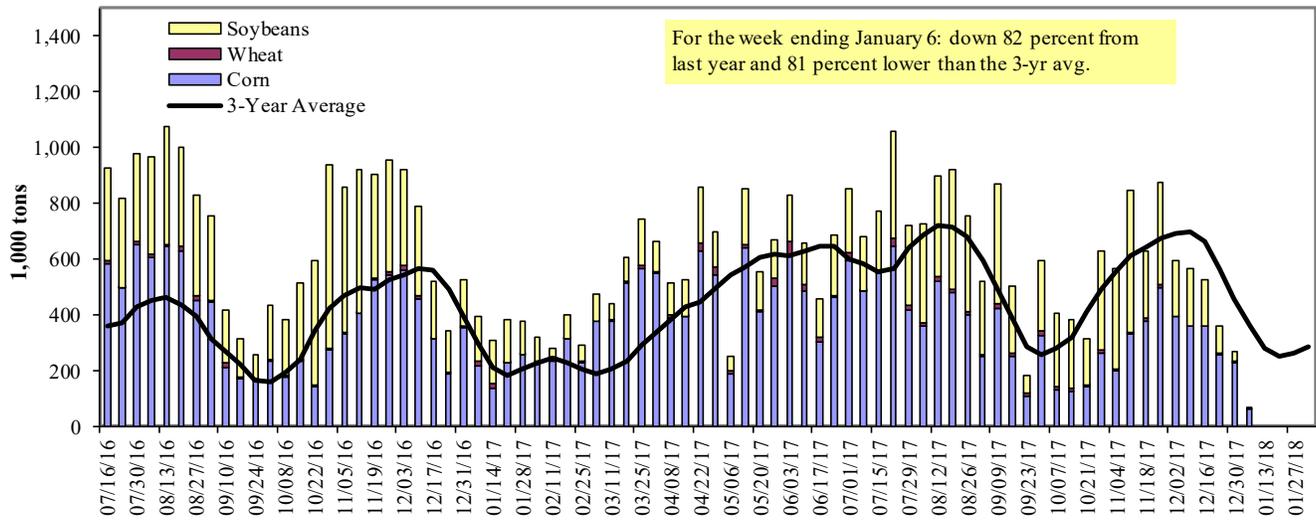


Figure 10

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)

For the week ending 01/06/2018	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	0	2	2	0	3
Alton, IL (L26)	50	3	3	0	56
Granite City, IL (L27)	64	0	5	0	68
Illinois River (L8)	44	8	14	0	66
Ohio River (L52)	10	0	76	0	86
Arkansas River (L1)	0	21	36	0	57
Weekly total - 2018	74	21	117	0	211
Weekly total - 2017	301	52	288	21	663
2018 YTD ¹	74	21	117	0	211
2017 YTD	301	52	288	21	663
2018 as % of 2017 YTD	24	40	40	0	32
Last 4 weeks as % of 2017 ²	85	80	77	35	80
Total 2017	22,242	2,210	16,123	360	40,936

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.

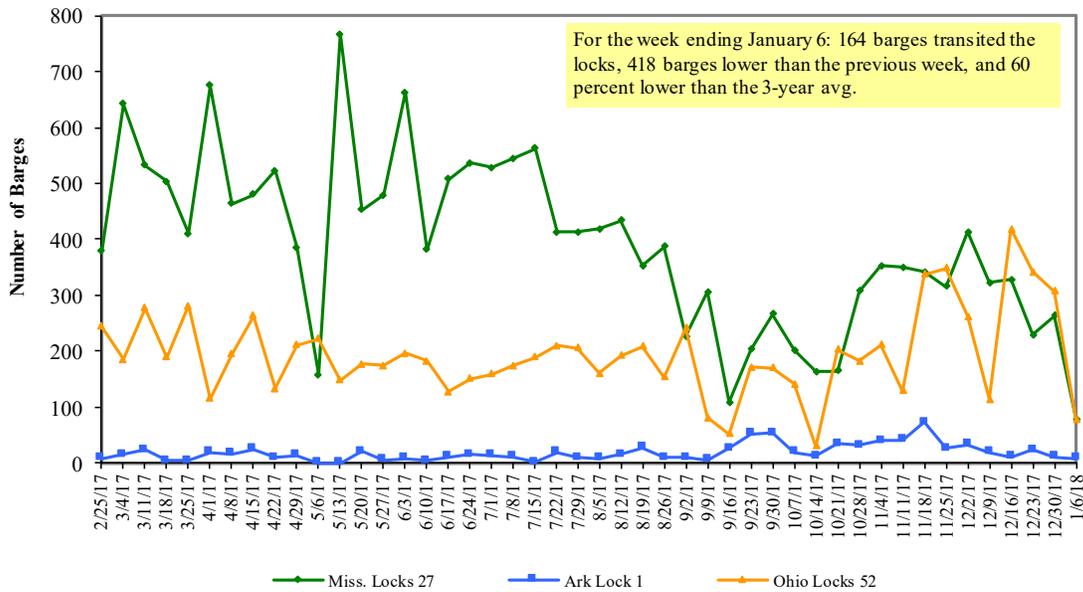
² As a percent of same period in 2017.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers

Figure 11

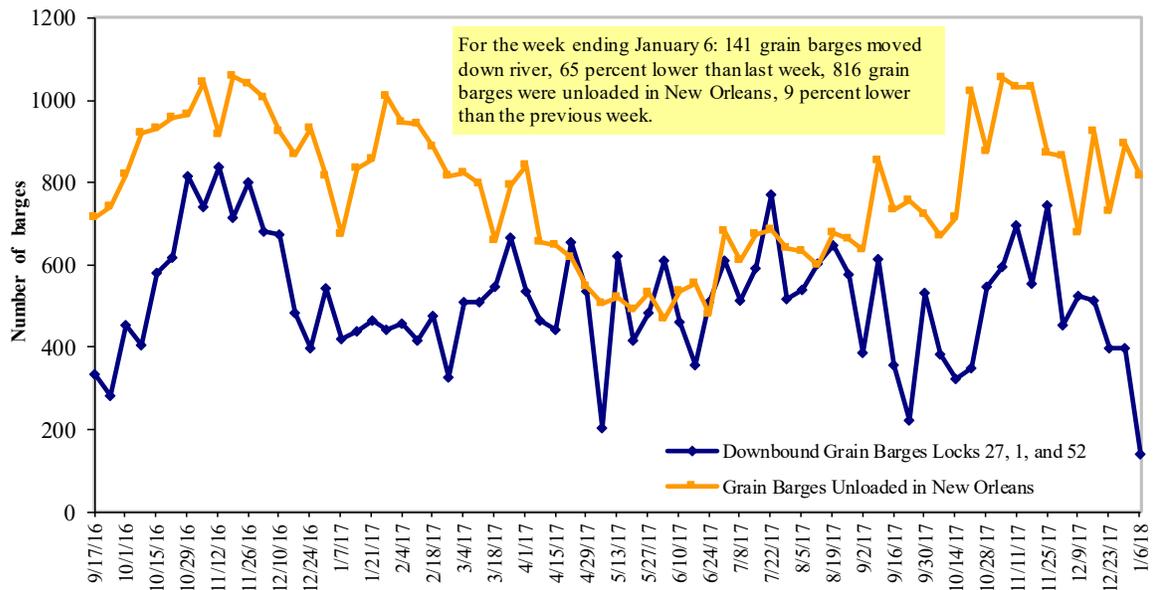
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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, Week Ending 01/8/2018 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.025	0.045	0.377
	New England	3.077	0.067	0.400
	Central Atlantic	3.209	0.058	0.396
	Lower Atlantic	2.887	0.033	0.361
II	Midwest ²	2.947	0.012	0.400
III	Gulf Coast ³	2.785	0.011	0.337
IV	Rocky Mountain	2.974	-0.007	0.433
V	West Coast	3.394	0.033	0.521
	West Coast less California	3.087	0.014	0.313
	California	3.638	0.048	0.685
Total	U.S.	2.996	0.023	0.399

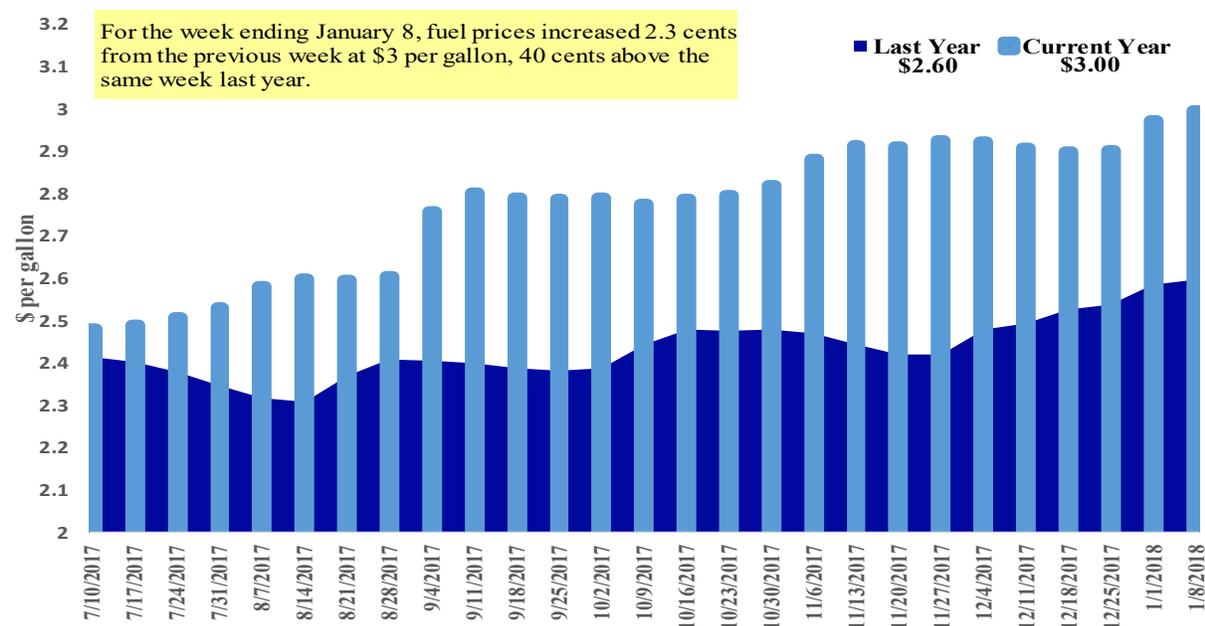
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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)

For the week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances¹									
12/28/2017	2,186	795	1,580	1,194	58	5,813	16,013	12,667	34,493
This week year ago	1,983	635	2,353	1,049	139	6,160	19,421	14,869	40,450
Cumulative exports-marketing year²									
2017/18 YTD	5,600	1,205	3,530	3,108	214	13,657	10,658	28,399	52,713
2016/17 YTD	6,443	1,217	4,424	2,443	263	14,790	16,312	33,103	64,205
YTD 2017/18 as % of 2016/17	87	99	80	127	81	92	65	86	82
Last 4 wks as % of same period 2016/17	112	111	69	118	42	95	82	89	86
2016/17 Total	11,096	2,285	7,923	4,254	484	26,042	41,864	51,156	119,062
2015/16 Total	5,538	3,057	6,285	3,551	670	19,101	45,564	49,821	114,486

¹ Current unshipped (outstanding) export sales to date

² Shipped export sales to date; new marketing year now in effect for wheat, 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

For the week ending 12/28/2017			% change current MY from last MY	Exports ³ 3-year avg 2014-2016
	2017/18 Current MY	2016/17 Last MY		
Mexico	9,700	9,917	(2)	12,297
Japan	3,952	4,347	(9)	11,450
Korea	1,158	3,085	(62)	4,494
Colombia	1,951	2,183	(11)	4,179
Peru	1,577	1,697	(7)	2,693
Top 5 Importers	18,337	21,230	(14)	35,113
Total US corn export sales	26,671	35,733	(25)	49,308
% of Projected	54%	61%		
Change from prior week²	101	429		
Top 5 importers' share of U.S. corn export sales	69%	59%		71%
USDA forecast, December 2017	48,982	58,346	(16)	
Corn Use for Ethanol USDA forecast, December 2017	140,335	138,151	2	

¹ Based on FAS Marketing Year Ranking Reports for 2015/16 - 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/>. Total commitments change (net sales) from prior week could include revisions from
previous week's outstanding sales or accumulated sales.

³ FAS Marketing Year Ranking Reports - <http://apps.fas.usda.gov/export-sales/myrkaug.htm>; 3-yr average

Table 14

Top 5 Importers¹ of U.S. Soybeans

For the week ending 12/28/2017	Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg. 2014-2016
	2017/18 Current MY	2016/17 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	24,514	31,510	(22)	31,881
Mexico	2,125	2,008	6	3,452
Indonesia	905	1,078	(16)	1,987
Japan	1,270	1,318	(4)	2,067
Netherlands	890	609	0	2,098
Top 5 importers	29,703	36,523	(19)	41,486
Total US soybean export sales	33,103	41,066	(19)	52,919
% of Projected	54%	69%		
Change from prior week ²	554	88		
Top 5 importers' share of U.S. soybean export sales	90%	89%		78%
USDA forecast, December 2017	61,308	59,237	103	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2015/16 - 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/. The total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales and/or accumulated sales³FAS 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

For the week ending 12/28/2017	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2014-2016
	2017/18 Current MY	2016/17 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,141	1,984	8	2,620
Mexico	2,354	2,109	12	2,743
Philippines	2,159	2,045	6	2,395
Brazil	111	1,107	(90)	862
Nigeria	1,005	1,073	(6)	1,254
Korea	1,306	1,099	19	1,104
China	817	963	(15)	1,623
Taiwan	854	832	3	768
Indonesia	977	699	40	726
Colombia	517	631	(18)	635
Top 10 importers	12,241	12,541	(2)	14,729
Total US wheat export sales	19,338	20,766	(7)	22,804
% of Projected	73%	72%		
Change from prior week ²	132	184		
Top 10 importers' share of U.S. wheat export sales	63%	60%		65%
USDA forecast, December 2017	26,567	28,747	(8)	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2015/16 - 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/. Total commitments change (net sales) from prior week could include revisions from the previous week's outstanding and/or accumulated sales³FAS 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	For the Week Ending 01/04/18	Previous Week ¹	Current Week as % of Previous	2018 YTD	2017 YTD	2018 YTD as % of 2017 YTD	Last 4-weeks as % of:		2017 Total
							Last Year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	0	177	0	0	143	0	106	96	14,805
Corn	71	248	29	71	174	41	96	199	10,928
Soybeans	208	200	104	208	279	75	72	66	13,246
Total	280	625	45	280	595	47	86	89	38,978
Mississippi Gulf									
Wheat	65	13	507	65	33	198	106	110	4,198
Corn	325	329	99	325	337	97	69	72	28,690
Soybeans	470	868	54	470	722	65	84	86	32,911
Total	860	1,210	71	860	1,091	79	80	82	65,800
Texas Gulf									
Wheat	16	69	23	16	29	55	70	107	6,354
Corn	0	0	n/a	0	27	0	0	0	733
Soybeans	0	0	n/a	0	0	n/a	94	71	292
Total	16	69	23	16	56	28	61	87	7,379
Interior									
Wheat	1	30	3	1	39	2	70	84	1,727
Corn	102	96	106	102	84	121	122	126	8,733
Soybeans	20	89	23	20	62	33	101	103	5,496
Total	123	215	57	123	185	66	107	112	15,956
Great Lakes									
Wheat	0	0	n/a	0	0	n/a	75	86	711
Corn	0	0	n/a	0	0	n/a	n/a	136	192
Soybeans	0	0	n/a	0	0	n/a	103	38	890
Total	0	0	n/a	0	0	n/a	86	59	1,793
Atlantic									
Wheat	0	0	n/a	0	0	n/a	0	0	46
Corn	0	0	n/a	0	0	n/a	0	0	32
Soybeans	4	41	9	4	11	36	82	74	1,996
Total	4	41	9	4	11	36	76	70	2,075
U.S. total from ports									
Wheat	82	289	28	82	243	34	91	97	27,841
Corn	498	672	74	498	621	80	80	95	49,308
Soybeans	703	1,199	59	703	1,073	66	82	80	54,831
Total	1,282	2,160	59	1,282	1,937	66	83	86	131,980

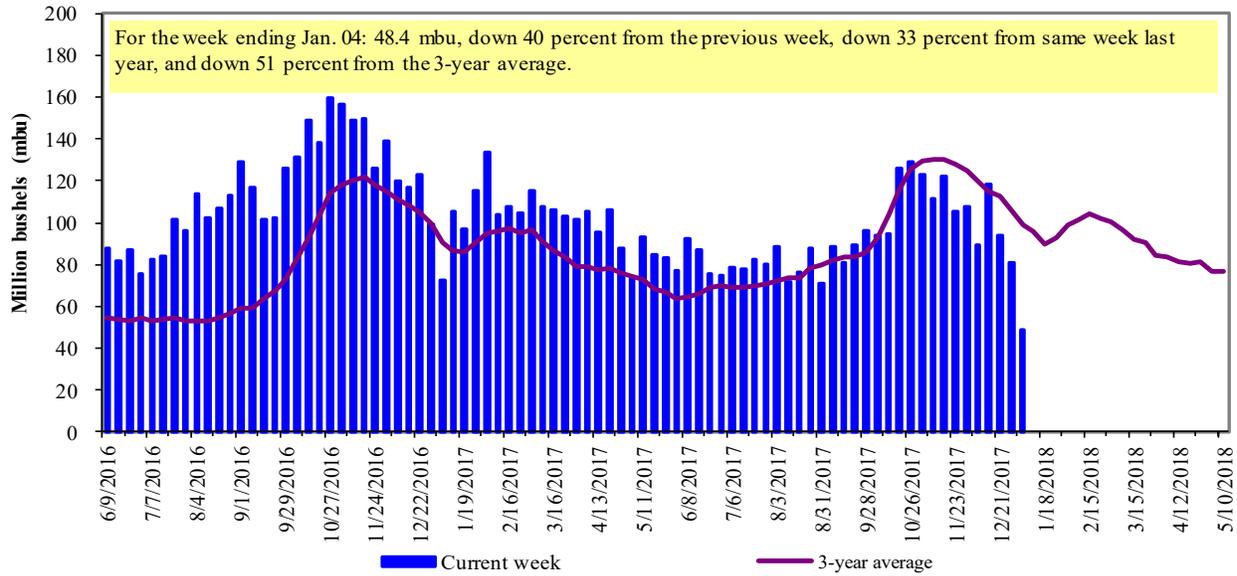
¹Data includes revisions from prior weeks; some regional and U.S. totals may not add exactly due to rounding.

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 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2017.

Figure 14

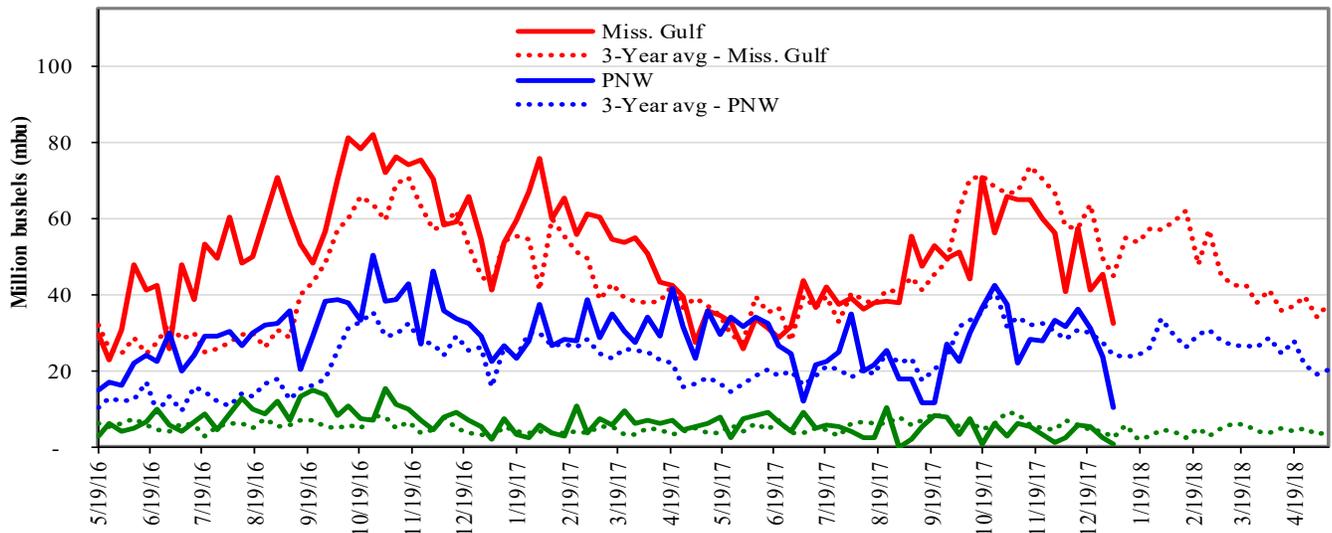
U.S. grain inspected for export (wheat, corn, and soybeans)



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)



Week ending 01/04/18 inspections (mbu):		Percent change from:				
Mississippi Gulf:	32.5	Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
PNW:	10.5	Last Year (same week):	down 28	down 77	down 31	down 56
Texas Gulf:	0.6	3-yr avg. (4-wk. mov. Avg):	down 21	down 86	down 23	down 53
			down 40	down 86	down 43	down 63

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

Ocean Transportation

Table 17

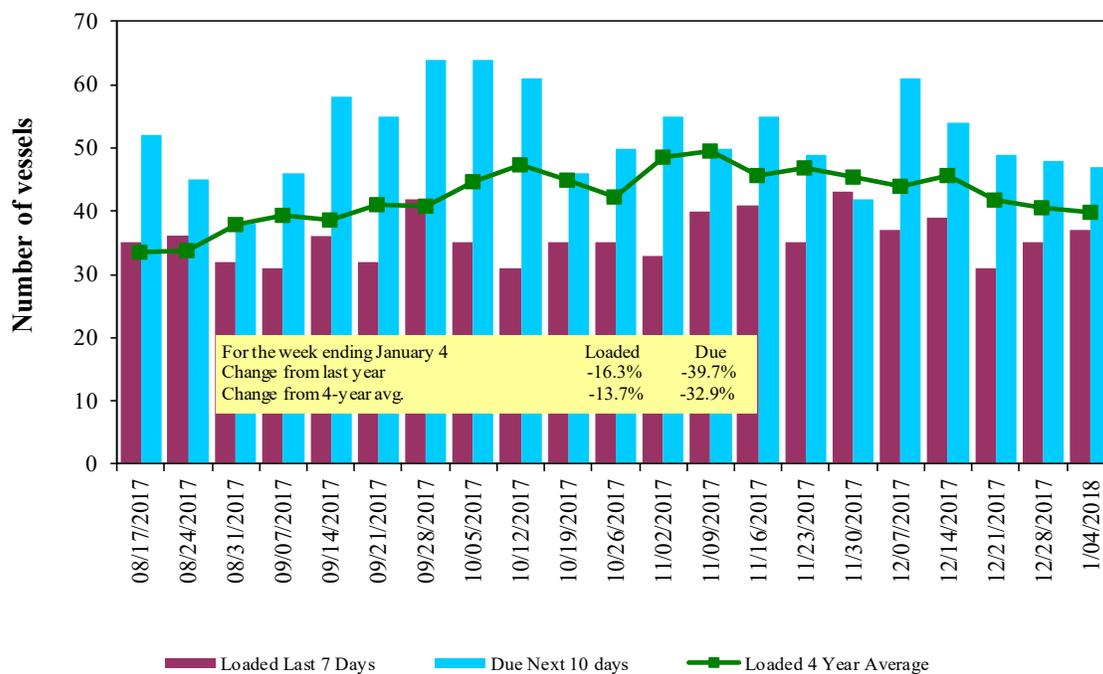
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
1/4/2018	41	37	47	13
12/28/2017	53	35	48	7
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg.	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

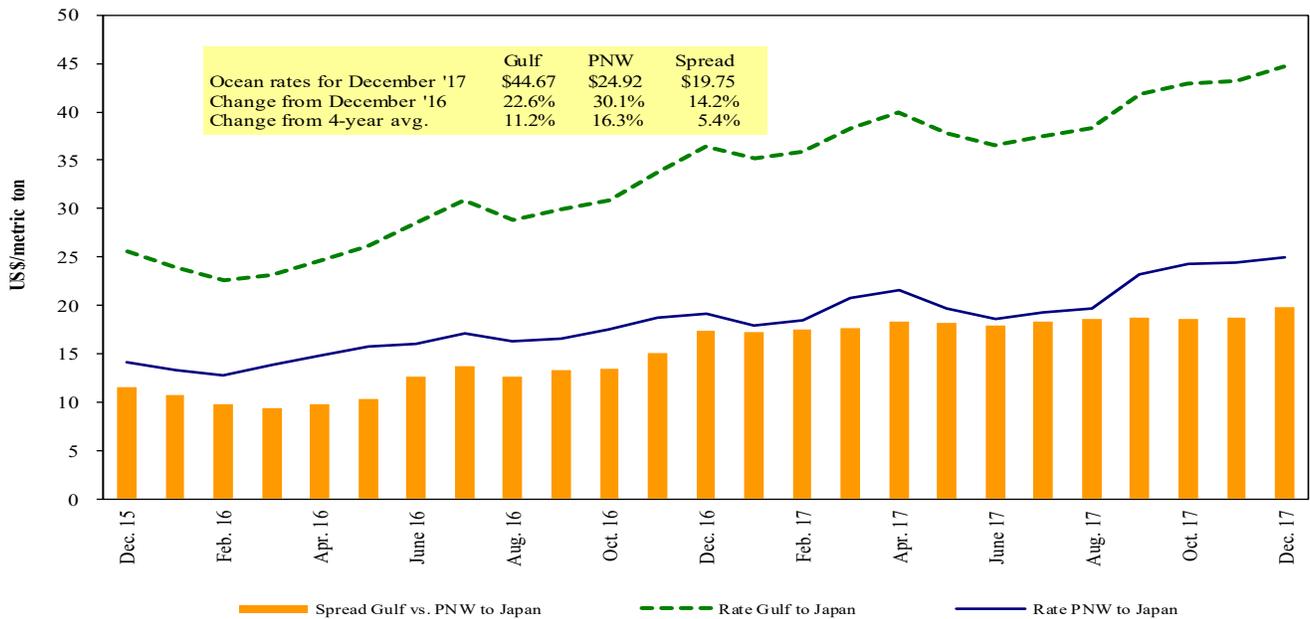
U.S. Gulf Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA
¹U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 01/06/2018

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 1/10	60,000	45.50
U.S. Gulf	China	Heavy Grain	Dec 15/20	60,000	44.00
U.S. Gulf	China	Heavy Grain	Dec 10/20	60,000	43.25
U.S. Gulf	China	Heavy Grain	Nov 27/Dec 5	47,700	40.50
U.S. Gulf	China	Heavy Grain	Nov 20/30	66,000	41.25
U.S. Gulf	China	Heavy Grain	Nov 20/30	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 15/25	65,000	43.85
U.S. Gulf	China	Heavy Grain	Nov 10/20	66,000	43.75
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	41.50
U.S. Gulf	Dakar	Wheat	Nov 20/30	7,500	73.89*
U.S. Gulf	Somali	Sorghum	Dec 1/10	10,640	192.10*
PNW	China	Heavy Grain	Dec 23/30	60,000	22.25
PNW	China	Heavy Grain	Dec 15/24	60,000	23.75
PNW	South Korea	Heavy Grain	Dec 14/20	60,000	24.00
Brazil	China	Heavy Grain	Dec 1/10	60,000	31.90
Brazil	China	Heavy Grain	Nov 20/30	60,000	33.75
Brazil	China	Heavy Grain	Nov 1/10	60,000	31.90
Brazil	S. Korea	Heavy Grain	Nov 22/29	63,000	33.25

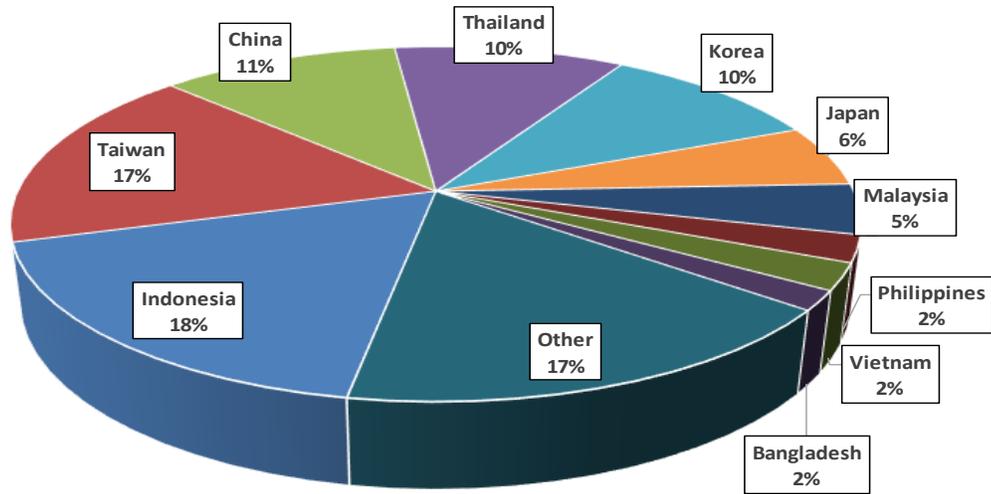
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option

*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 2016, containers were used to transport 7 percent of total U.S. waterborne grain exports. Approximately 63 percent of U.S. waterborne grain exports in 2016 went to Asia, of which 10 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

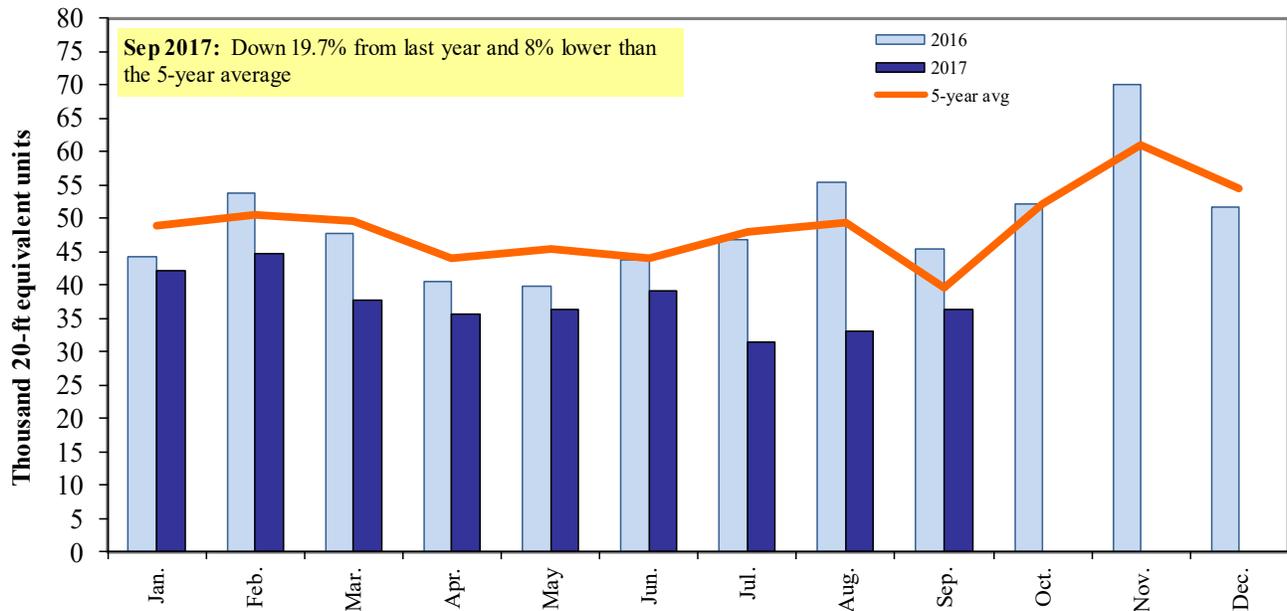
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-September 2017



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, 110220, 110290, 120100, 120810, 230210, 230310, 230330, and 230990.

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