



Grain Transportation Report

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WEEKLY HIGHLIGHTS

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Highwater Continues to Disrupt River Traffic

According to the U.S. Army Corps of Engineers, minor flooding is forecast or occurring across the western and southern portions of the Ohio River Basin and within the lower Mississippi River Basin. The Ohio River at Cairo, IL, where the Ohio River flows into the Mississippi River, has crested and is not expected by the National Weather Service to begin to fall until April 14. Navigation on the lower Mississippi River though Vicksburg, MS, and Baton Rouge, LA, continues to be restricted to daylight only. Barge movements on the Mississippi River, in the area between Baton Rouge and New Orleans, require additional time and towboats to unload grain and return empty barges upriver due to high and fast river conditions. With the on-going conditions, barge freight rates have been above average for several weeks. As of April 10, spot barge rates for export grain have been 60 to 121 percent above the 3-year average.

STB Welcomes Informal Discussions in Two Pending Regulatory Proceedings

On March 28, the Surface Transportation Board (STB) waived its ex parte prohibition to permit informal communications with stakeholders regarding [EP 665 \(Sub-No. 2\)](#), "Expanding Access to Rate Relief," and clarified that a prohibition on ex parte communications is not applicable in [EP 722](#), "Railroad Revenue Adequacy." EP 665 was initiated on August 31, 2016, seeking input on developing a new rail rate reasonableness methodology for small disputes, that would be more affordable and accessible to shippers. On April 2, 2014, STB opened EP 722 to explore the Board's methodology for determining railroad revenue adequacy and the use of revenue adequacy, in rate reasonableness cases. According to STB, "These decisions will facilitate informal discussions between the Board's Rate Reform Task Force and stakeholders, which could involve issues or comments submitted in the two proceedings. Informal discussions can help the Board obtain a more thorough understanding of the interests of stakeholders and help develop additional ideas for new rate review processes."

Negotiators Make "Significant Progress" for New East and Gulf Coast Port Labor Agreement

On March 23, 2018, the International Longshoremen's Association, AFL-CIO (ILA), and United States Maritime Alliance (USMX), announced they have made significant progress on terms for a Six-Year Master Contract. During a two-day meeting, some 50 negotiators from the two sides worked on Master Contract items. Their goal was to present a complete contract package to the full ILA Wage Scale Delegates, sometime in the near future. A ratification vote will then be scheduled for the thousands of ILA members working at ports on the Atlantic and Gulf Coasts. (Source: https://www.usmx.com/assets/content/public-resources/ILA-USMX_Joint_Statement_3-22-18_FINAL.pdf.)

Snapshots by Sector

Export Sales

For the week ending March 29, **unshipped balances** of wheat, corn, and soybeans totaled 37.1 mmt, up 23 percent from the same time last year. Net weekly **wheat export sales** were .109 mmt, down 70 percent from the previous week. Net **corn export sales** were .898 mmt, down 34 percent from the previous week. Net **soybean export sales** totaled 1.13 mmt, up 256 percent from the previous week.

Rail

U.S. Class I railroads originated 24,002 **grain carloads** for the week ending March 31, up 2 percent from the previous week, up 3 percent from last year, and up 6 percent from the 3-year average.

Average April shuttle **secondary railcar** bids/offers per car were \$475 above tariff for the week ending April 5, down \$113 from last week, and \$794 higher than last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending April 7, **barge grain movements** totaled 629,450 tons, 10 percent lower than the previous week and down 11 percent from the same period last year.

For the week ending April 7, 395 grain barges **moved down river**, 47 barges less than the previous week. There were 792 grain barges **unloaded in New Orleans**, 30 percent higher than the previous week.

Ocean

For the week ending April 5, 36 **ocean-going grain vessels** were loaded in the Gulf, 10 percent less than the same period last year. Fifty-five vessels are expected to be loaded within the next 10 days, 8 percent more than the same period last year.

For the week ending April 5, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$44.00 per metric ton, 2 percent less than the previous week. The cost of shipping from the PNW to Japan was \$24.25 per metric ton, 1 percent less than the previous week.

Fuel

During the week ending April 9, average **diesel fuel prices** remain unchanged from the previous week at \$3.04 per gallon, 46 cents higher than the same week last year.

Feature Article/Calendar

First Quarter Grain Inspections Down but Above Average

During the first quarter of 2018, grain (corn, wheat, and soybeans) inspected for export from all U.S. ports reached 31.3 million metric tons (mmt). Total inspections of grain were down 12 percent from last year and 6 percent above the 5-year average, according to USDA's Grain Inspection, Packers and Stockyards Administration (GIPSA) (*see table*). First quarter inspections were down from last year for corn, soybeans, and wheat. Total inspections of grain dropped, mainly due to increasing export competition abroad and lower demand from three major importers of U.S. grain (Asia, Latin America, and Africa). Inspections of grain in the Gulf were below last year's total, but Pacific Northwest (PNW) grain inspections increased from last year as the increased ocean rate spread favored shipments through the PNW.

Gulf Inspections: First quarter grain inspections at U.S. Gulf ports reached 16.7 mmt, down 24 percent from last year and 5 percent below the 5-year average (*see table*). First quarter Gulf corn inspections dropped 32 percent from last year. Soybean and wheat inspections in the Gulf decreased 16 and 17 percent, respectively, from last year. First quarter Gulf inspections of grain destined for Asia, Latin America, and Africa experienced significant decreases, compared to last year. U.S. Gulf rail deliveries of grain to port, in the first quarter, decreased 49 percent from last year (*see GTR Table 3, April 5, 2018*). Barge movements of grain through the lock sections of the Mississippi River were about 21 percent below last year, during the first quarter, mostly due to river delays.

First Quarter Total Grain Inspections By Ports, 2005-2018
(Includes Corn, Soybeans, and Wheat)

Year	U.S. Gulf	% of Average	PNW	% of Average	Atlantic & Lakes	% of Average	Interior	% of Average	U.S. Total	% of Average
				1000 Metric Tons						
2005	16,165	92%	7,253	83%	436	50%	1,423	53%	25,277	85%
2006	17,693	101%	6,999	80%	419	48%	1,659	62%	26,770	90%
2007	18,246	104%	7,711	89%	538	62%	2,383	89%	28,879	97%
2008	20,115	115%	9,433	108%	663	76%	3,674	137%	33,885	114%
2009	17,519	100%	6,869	79%	512	59%	1,967	73%	26,867	90%
2010	19,298	110%	8,257	95%	711	82%	2,746	102%	31,012	104%
2011	21,714	124%	7,664	88%	761	87%	2,665	99%	32,804	110%
2012	15,692	90%	8,278	95%	475	55%	3,610	134%	28,055	94%
2013	12,492	71%	7,590	87%	884	101%	1,966	73%	22,932	77%
2014	19,626	112%	8,441	97%	984	113%	2,822	105%	31,874	107%
2015	16,976	97%	8,670	100%	910	104%	2,548	95%	29,105	98%
2016	16,700	95%	8,996	103%	884	101%	2,774	103%	29,354	99%
2017	21,836	125%	9,831	113%	695	80%	3,341	124%	35,703	120%
2018	16,684	95%	10,447	120%	633	73%	3,505	130%	31,269	105%
2013-2017 Avg.	17,526		8,706		871		2,690		29,794	

Source: USDA/GIPSA

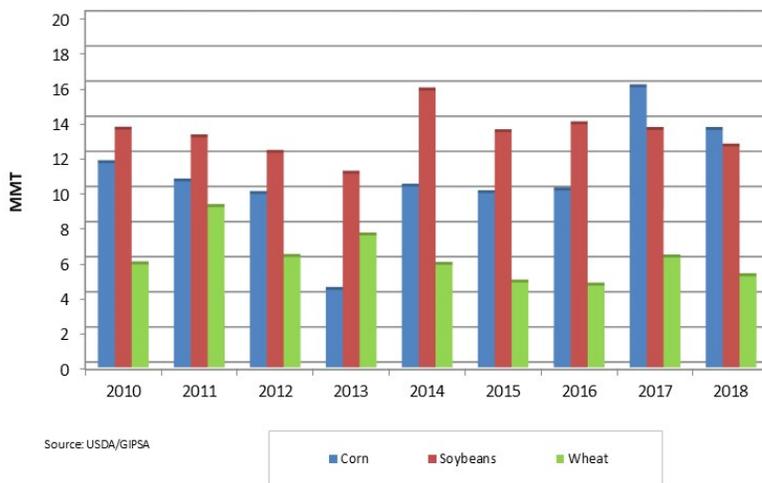
PNW Inspections: First quarter grain inspections in the PNW reached a record 10.4 mmt, up 6 percent from last year and 20 percent above the 5-year average (*see table*). First quarter rail deliveries of grain to PNW ports increased slightly from last year (*see GTR Table 3, April 5, 2018*). First quarter PNW corn inspections increased 24 percent from last year, to a record 4.5 mmt. PNW soybean inspections increased 10 percent from last year while inspections of wheat, decreased 18 percent.

Atlantic and Great Lakes Inspections: Atlantic and Great Lakes first quarter grain inspections decreased 9 percent from last year, to .633 mmt. Inspections of grain in the Atlantic and Great Lakes were 27 percent below the 5-year average. Corn and soybean inspections were down in the

Atlantic and Great Lakes due to smaller shipments to Asia. Conversely, wheat inspections in the regions increased 89 percent, due to increased demand from Mexico and Africa.

Interior Inspections: First quarter Interior grain inspections reached 3.5 mmt, up 5 percent from last year and 30 percent above the 5-year average. Inspections of corn in the Interior increased 4 percent from last year, due mainly to increased shipments to Mexico. Interior soybean inspections reached a record high of 1.4 mmt, up 16 percent from last year, due primarily to a 35 percent increase in shipments to Mexico. Interior wheat inspections dropped 21 percent from last year, as shipments to Mexico decreased notably.

First Quarter Grain Inspections, by Types



Corn and Soybean

Inspections: First quarter corn inspections reached 13.5 mmt, down 15 percent from last year (*see figure*). Inspections of corn, however, were 33 percent above the 5-year average. First quarter corn inspections decreased 32 percent from last year in the Gulf, but increased notably in the PNW, as shipments to Asia remained steady.

First quarter soybean inspections reached 12.6 mmt, down 7 percent from last year and 7 percent below the 5-year average (*see figure*). Due in part to barge delays in route to the Gulf in February, first quarter soybeans inspected for export to China (6.2 mmt) decreased 17 percent from last year. Gulf soybean inspections reached 7.2 mmt, down 16 percent from last year and 12 percent below the 5-year average. PNW soybean inspections reached 3.4 mmt, up 10 percent from last year but dropped percent below the 5-year average.

Wheat Inspections: First quarter wheat inspections reached 5.2 mmt, down 17 percent from last year and 11 percent below the 5-year average (*see figure*). U.S. wheat inspections dropped primarily due to increasing global export competition. Export shipments of wheat decreased to Asia and Latin America.

Market Outlook: According to the March [World Agricultural Supply and Demand Estimates report](#), the 2017/18 forecast for U.S. corn exports is an expected 9 percent increase from last year, but was unchanged from the previous month. Wheat exports are projected to decrease 12 percent from last year, but remained the same from month to month. The March forecast for 2017/18 soybean exports is down 5 percent from last year but was unchanged from March. Cumulative (shipped) marketing year-to-date export sales for corn, soybeans and wheat are running below last year by 16 percent (*see GTR Table 12*). Shipped grain exports, however, could rebound in the months ahead if outstanding (unshipped) export sales remain strong. Johnny.Hill@ams.usda.gov

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
04/11/18	204	275	234	329	197	172
04/04/18	204	275	239	310	201	174

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)

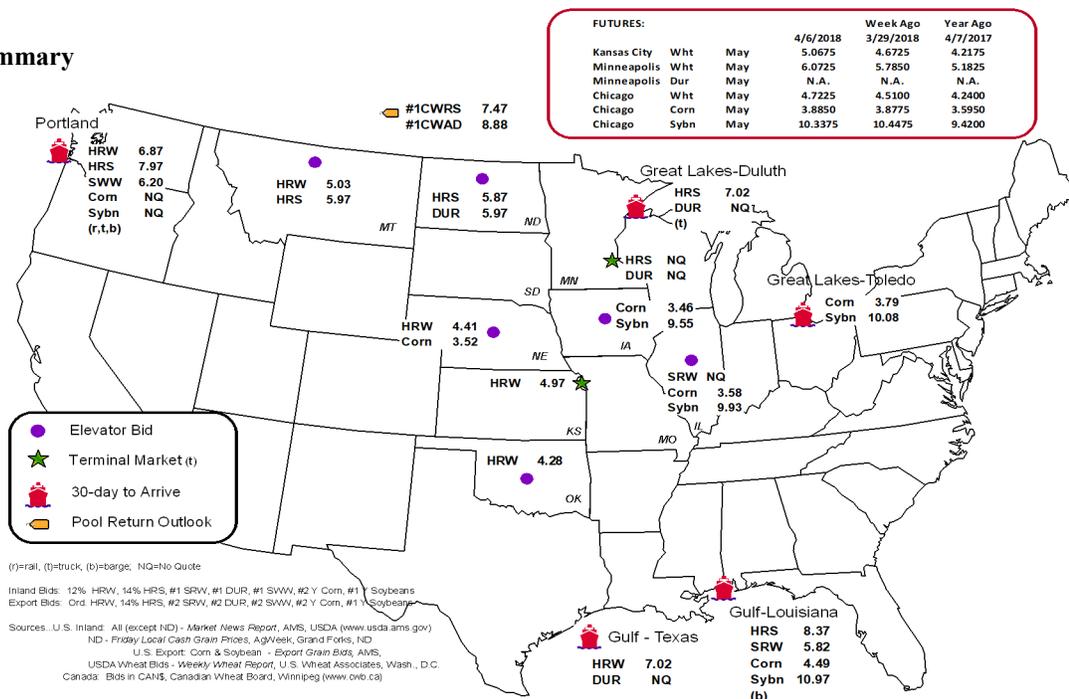
Commodity	Origin--Destination	4/6/2018	3/29/2018
Corn	IL--Gulf	-0.91	-0.82
Corn	NE--Gulf	-0.97	-0.85
Soybean	IA--Gulf	-1.42	-1.21
HRW	KS--Gulf	-2.05	-2.05
HRS	ND--Portland	-2.10	-2.26

Note: nq = no quote; n/a = not available

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

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
04/04/2018 ^p	47	1,703	7,016	466	9,232	3/31/2018	1,913
03/28/2018 ^r	254	1,512	6,805	345	8,916	3/24/2018	1,753
2018 YTD ^r	5,895	21,982	89,753	4,158	121,788	2018 YTD	24,428
2017 YTD ^r	12,086	27,584	87,963	8,949	136,582	2017 YTD	28,594
2018 YTD as % of 2017 YTD	49	80	102	46	89	% change YTD	85
Last 4 weeks as % of 2017 ²	32	82	115	75	98	Last 4wks % 2017	84
Last 4 weeks as % of 4-year avg. ²	50	97	124	69	110	Last 4wks % 4 yr	91
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 2017 and prior 4-year average.

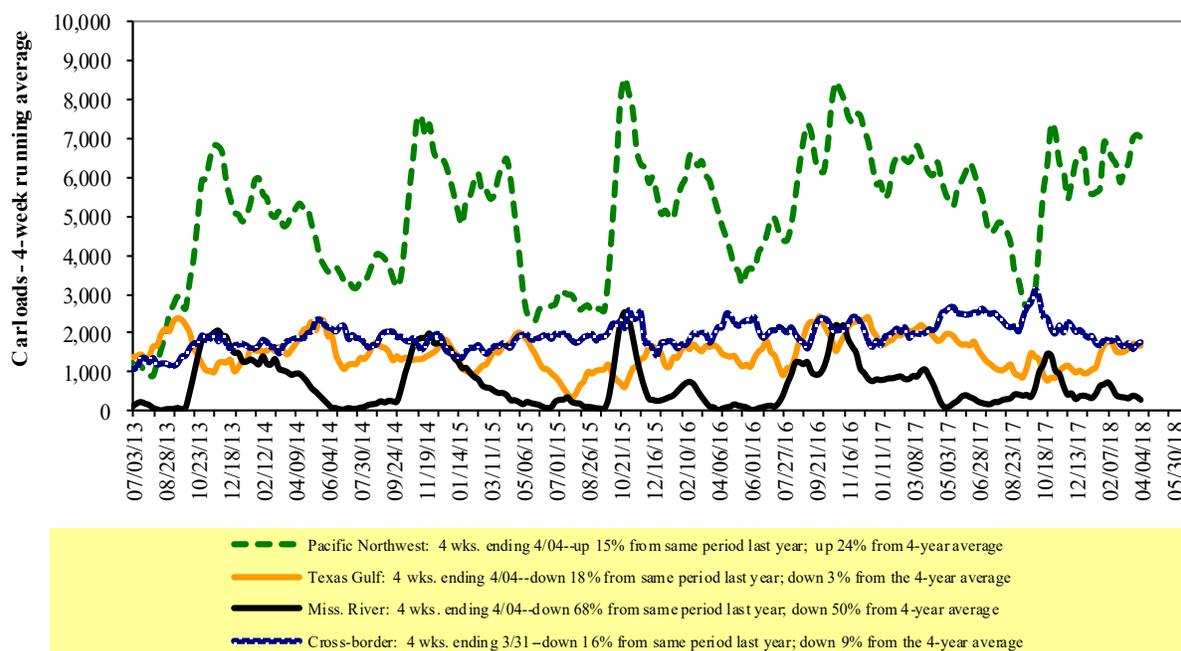
³ Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads to reflect switching between KCSM and Grupo Mexico.

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



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

For the week ending: 3/31/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,309	1,825	14,085	708	5,075	24,002	3,704	4,913
This week last year	1,641	2,759	11,637	786	6,376	23,199	4,468	4,996
2018 YTD	24,124	31,000	156,250	11,920	66,909	290,203	45,255	56,201
2017 YTD	24,861	36,901	146,059	12,854	80,909	301,584	50,929	54,743
2018 YTD as % of 2017 YTD	97	84	107	93	83	96	89	103
Last 4 weeks as % of 2017*	116	78	117	88	79	100	97	108
Last 4 weeks as % of 3-yr avg.**	108	79	120	88	92	105	101	108
Total 2017	89,465	142,828	578,964	50,223	289,574	1,151,054	198,639	244,766

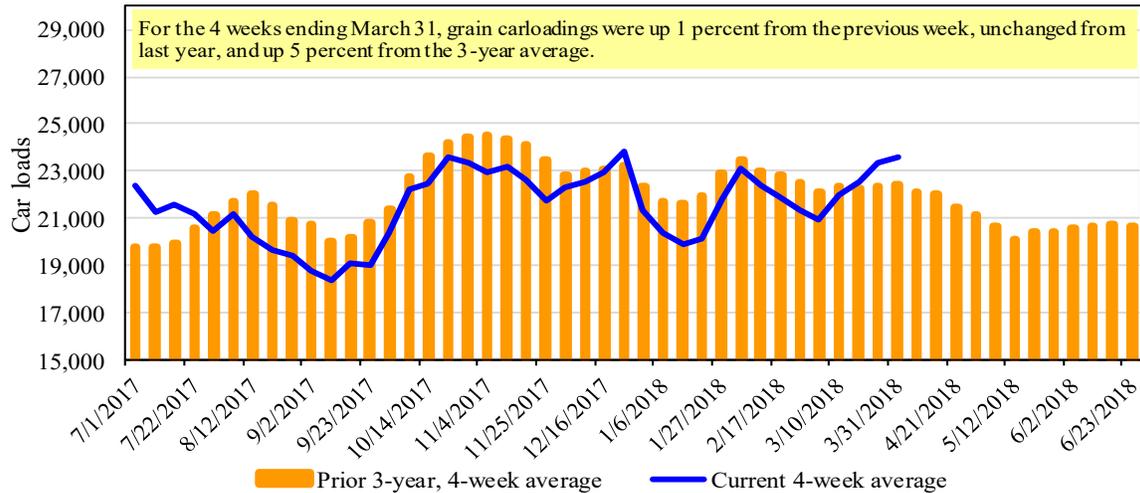
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 4/5/2018		Delivery period							
		Apr-18	Apr-17	May-18	May-17	Jun-18	Jun-17	Jul-18	Jul-17
BNSF ³	COT grain units	0	no bids	0	no bids	no bids	no bids	no bids	no bids
	COT grain single-car ⁵	2	11	1	0	0	no bids	0	no bids
UP ⁴	GCAS/Region 1	no offer	no offer	no offer	no bids	no bids	no bids	n/a	n/a
	GCAS/Region 2	no offer	no offer	no offer	no bids	no offer	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.

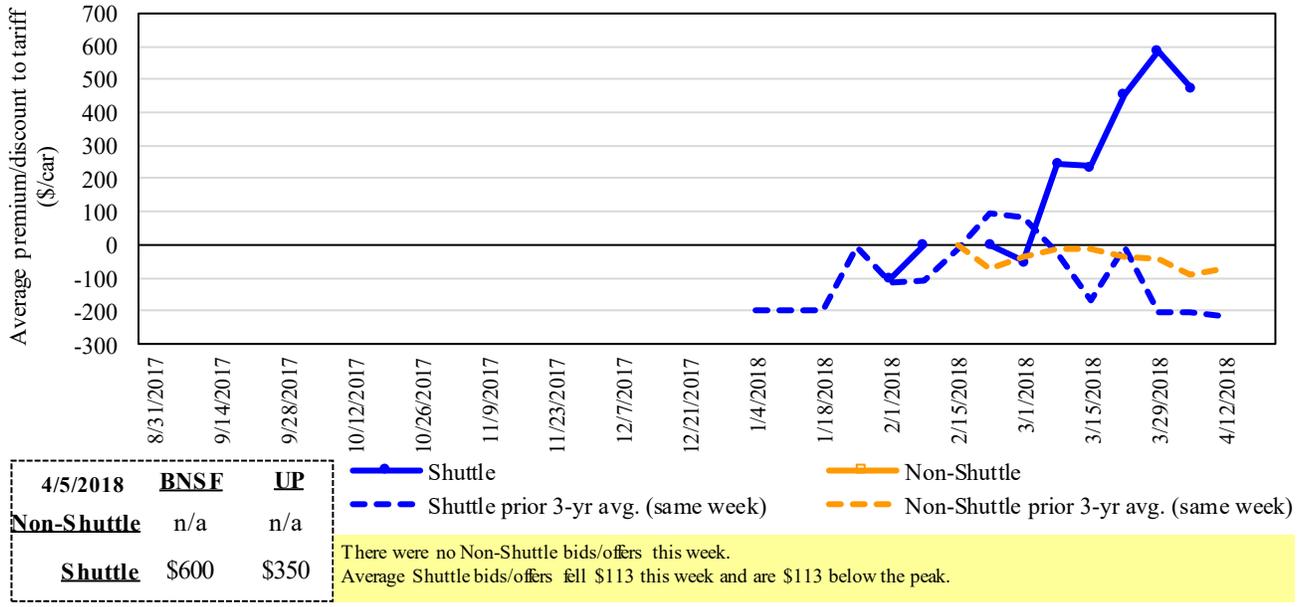
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

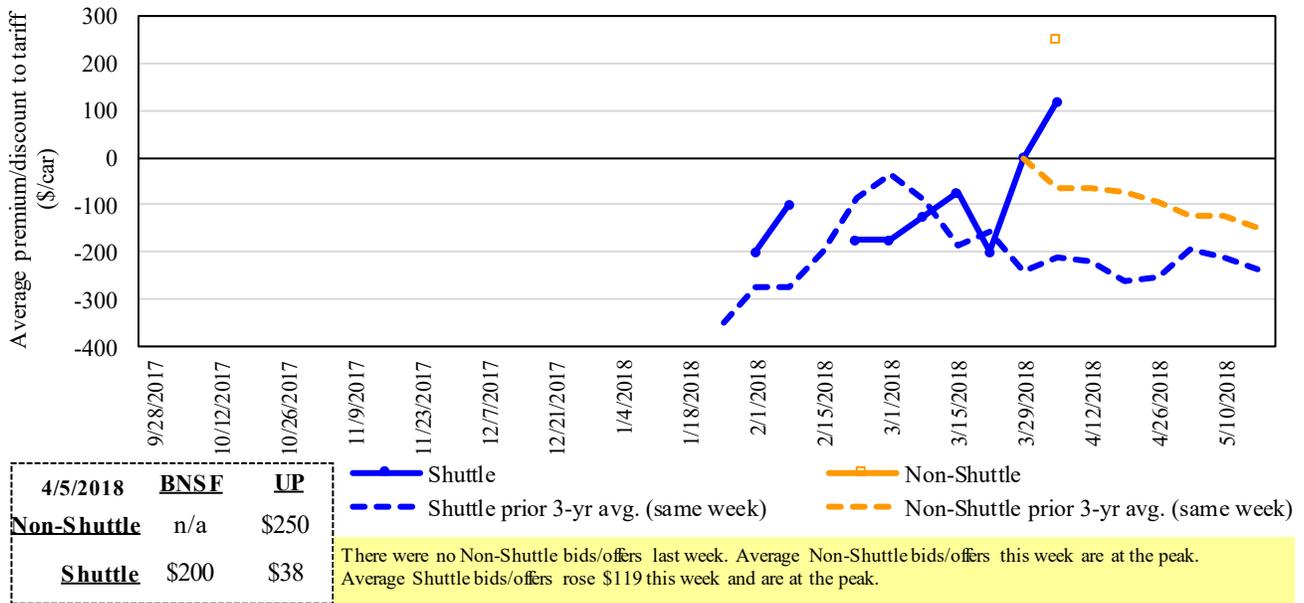
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



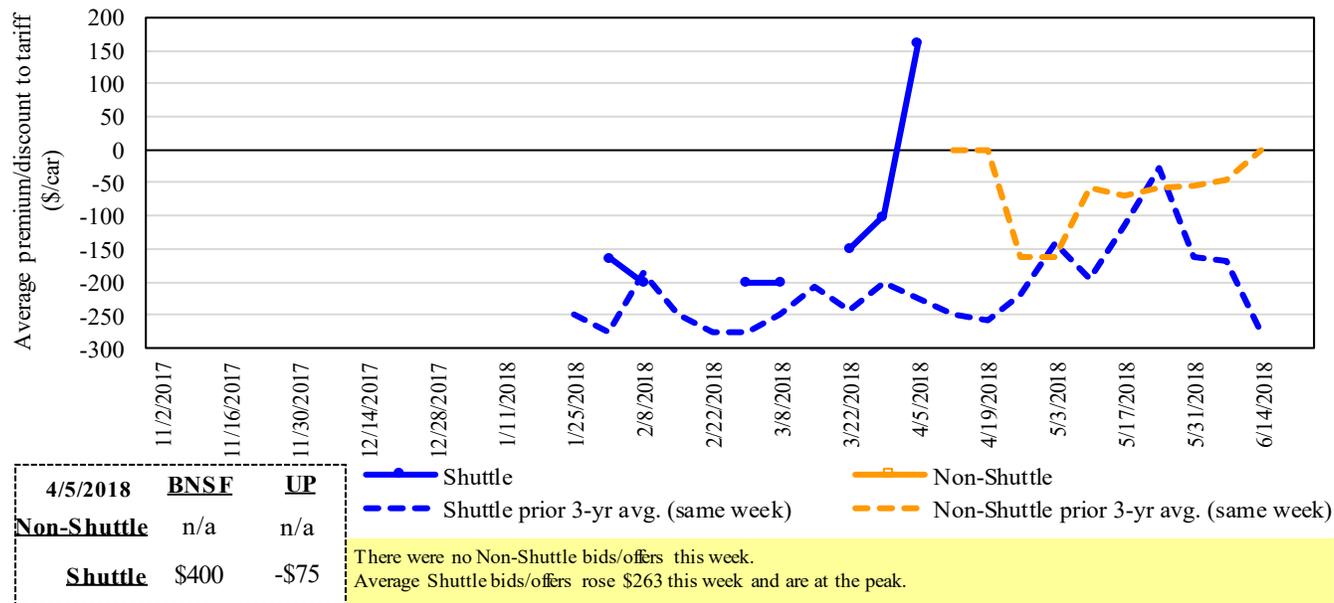
Non-shuttle bids include unit-train and single-car bids. n/a = not available.
 Source: Transportation & Marketing Programs/AMS/USDA

Figure 5
Bids/Offers for Railcars to be Delivered in May 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 June 2018, Secondary Market



	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	\$400	-\$75

—●— Shuttle
- - - Shuttle prior 3-yr avg. (same week)
—□— Non-Shuttle
- - - Non-Shuttle prior 3-yr avg. (same week)

There were no Non-Shuttle bids/offers this week.
 Average Shuttle bids/offers rose \$263 this week and are at the peak.

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: 4/5/2018		Delivery period					
		Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18
Non-shuttle	BNSF-GF	n/a	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	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	n/a	250	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	350	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	600	200	400	367	n/a	n/a
	Change from last week	(50)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2017	838	431	n/a	n/a	n/a	n/a
	UP-Pool	350	38	(75)	50	n/a	n/a
	Change from last week	(175)	38	25	250	n/a	n/a
	Change from same week 2017	750	388	225	225	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

April, 2018	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	bushel ²	Percent change Y/Y ⁴
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,883	\$96	\$39.51	\$1.08	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	\$169	\$46.76	\$1.27	5
	Sioux Falls, SD	Galveston-Houston, TX	\$6,786	\$0	\$67.39	\$1.83	1
	Northwest KS	Galveston-Houston, TX	\$4,816	\$185	\$49.66	\$1.35	5
	Amarillo, TX	Los Angeles, CA	\$5,021	\$258	\$52.42	\$1.43	5
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,931	\$191	\$40.93	\$1.04	9
	Toledo, OH	Raleigh, NC	\$6,344	\$0	\$63.00	\$1.60	5
	Des Moines, IA	Davenport, IA	\$2,258	\$40	\$22.82	\$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	\$119	\$37.02	\$0.94	4
	Des Moines, IA	Los Angeles, CA	\$5,327	\$346	\$56.34	\$1.43	5
Soybeans	Minneapolis, MN	New Orleans, LA	\$4,131	\$186	\$42.87	\$1.17	17
	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	\$191	\$49.02	\$1.33	7
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	\$304	\$60.73	\$1.65	5
	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	\$191	\$38.95	\$0.99	10
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	0
	Des Moines, IA	Amarillo, TX	\$3,970	\$150	\$40.91	\$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
	Sioux Falls, SD	Tacoma, WA	\$5,600	\$0	\$55.61	\$1.51	0
Soybeans	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	\$220	\$49.61	\$1.35	8
	Toledo, OH	Huntsville, AL	\$4,352	\$0	\$43.22	\$1.18	3
	Grand Island, NE	Portland, OR	\$5,710	\$311	\$59.79	\$1.63	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: April, 2018			Fuel			Percent	
Commodity	Origin state	Destination region	Tariff rate/car ¹	surcharge per car ²	Tariff plus surcharge per:		change ⁴ Y/Y
					metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,631	\$132	\$69.10	\$1.88	1
	KS	Guadalajara, JA	\$7,309	\$323	\$77.98	\$2.12	2
	TX	Salinas Victoria, NL	\$4,292	\$81	\$44.68	\$1.21	2
Corn	IA	Guadalajara, JA	\$8,313	\$293	\$87.93	\$2.23	2
	SD	Celaya, GJ	\$7,700	\$0	\$78.68	\$2.00	2
	NE	Queretaro, QA	\$8,013	\$278	\$84.72	\$2.15	3
	SD	Salinas Victoria, NL	\$6,743	\$0	\$68.90	\$1.75	2
	MO	Tlalnepantla, EM	\$7,379	\$271	\$78.16	\$1.98	3
	SD	Torreón, CU	\$7,300	\$0	\$74.59	\$1.89	2
Soybeans	MO	Bojay (Tula), HG	\$8,134	\$273	\$85.90	\$2.34	-5
	NE	Guadalajara, JA	\$8,692	\$298	\$91.85	\$2.50	-2
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	0
	KS	Torreón, CU	\$7,489	\$219	\$78.75	\$2.14	1
Sorghum	NE	Celaya, GJ	\$7,345	\$271	\$77.82	\$1.97	3
	KS	Queretaro, QA	\$7,819	\$165	\$81.58	\$2.07	4
	NE	Salinas Victoria, NL	\$6,452	\$133	\$67.28	\$1.71	5
	NE	Torreón, CU	\$6,790	\$211	\$71.53	\$1.82	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

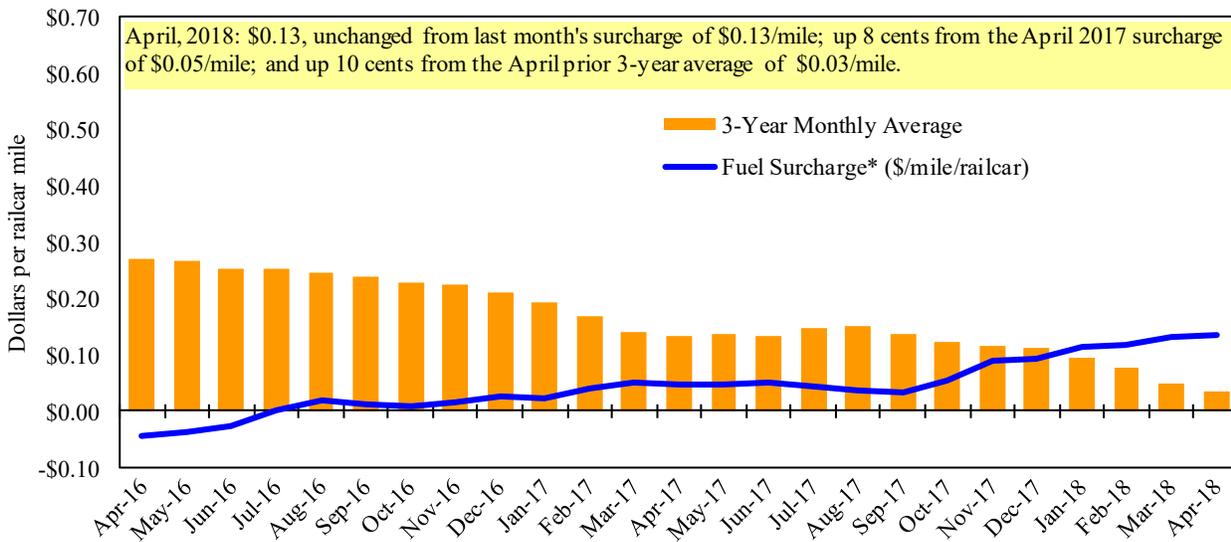
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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.

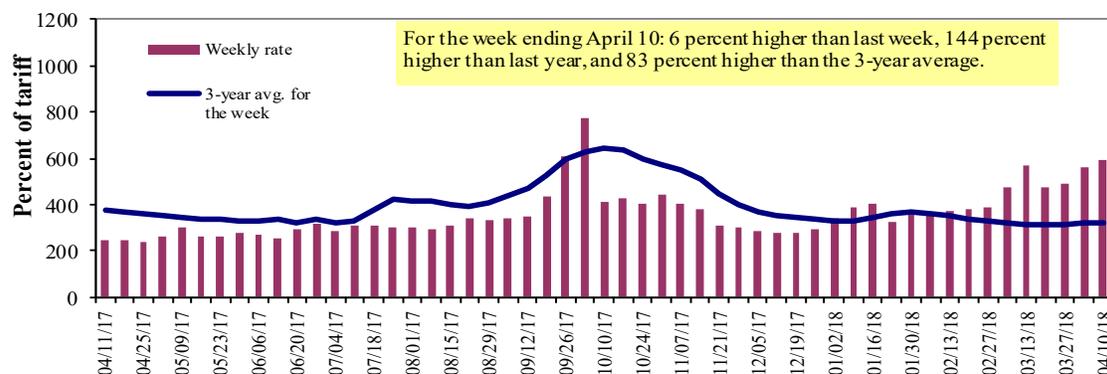
** CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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
Rate¹	4/10/2018	583	583	592	492	533	558	458
	4/3/2018	-	485	488	385	513	513	388
\$/ton	4/10/2018	36.09	31.02	27.47	19.63	25.00	22.54	14.38
	4/3/2018	-	25.80	22.64	15.36	24.06	20.73	12.18
Current week % change from the same week:								
	Last year	96	141	144	181	200	215	186
	3-year avg. ²	60	78	83	97	110	121	111
Rate¹	May	492	483	483	383	408	433	333
	July	492	458	458	358	383	383	308

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.

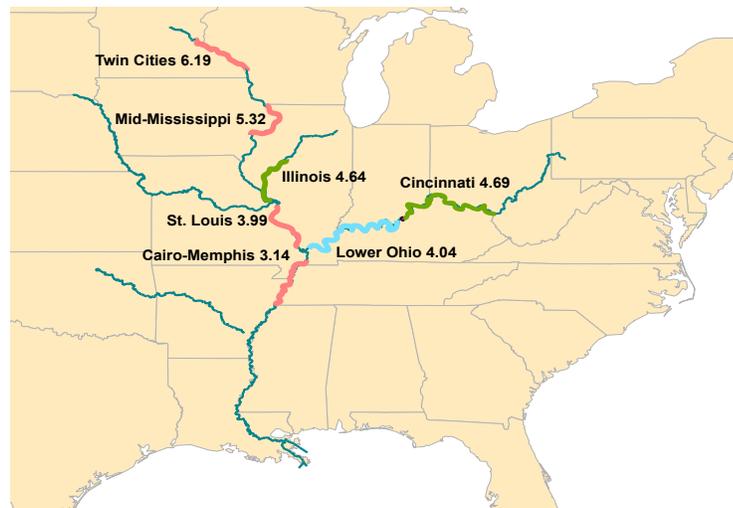
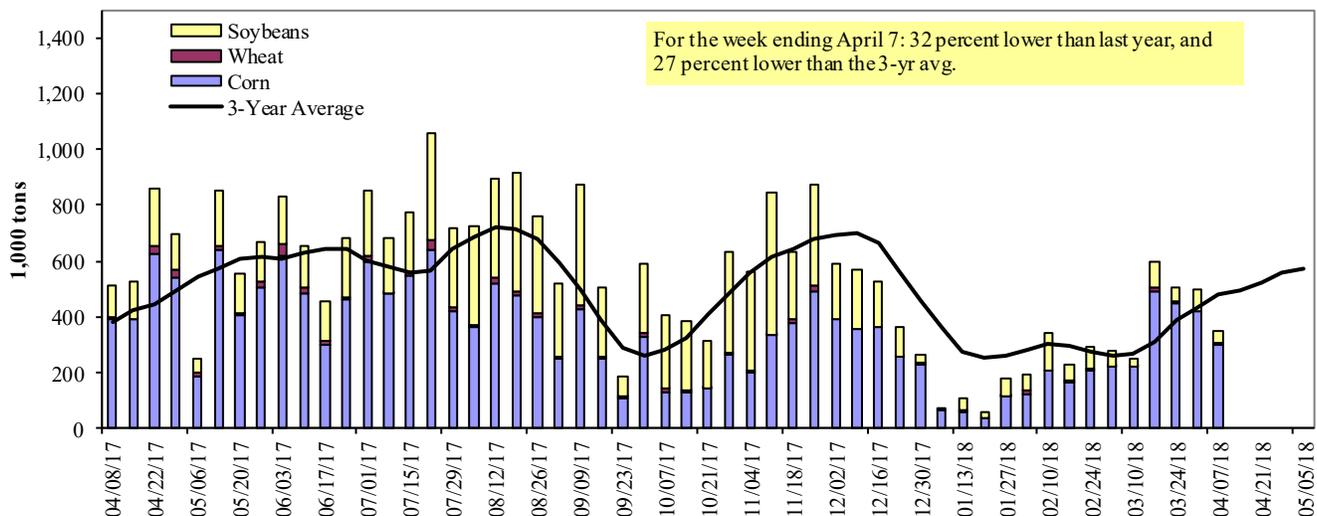


Figure 10

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 04/07/2018	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	56	0	8	0	64
Winfield, MO (L25)	89	5	19	2	114
Alton, IL (L26)	293	8	44	2	346
Granite City, IL (L27)	296	8	44	2	349
Illinois River (L8)	116	3	13	0	132
Ohio River (L52)	127	7	68	0	202
Arkansas River (L1)	0	31	47	0	78
Weekly total - 2018	423	46	159	2	629
Weekly total - 2017	479	51	175	2	706
2018 YTD ¹	4,448	419	2,916	47	7,830
2017 YTD	6,293	554	3,694	130	10,671
2018 as % of 2017 YTD	71	76	79	36	73
Last 4 weeks as % of 2017 ²	89	93	89	285	90
Total 2017	22,242	2,210	16,123	360	40,936

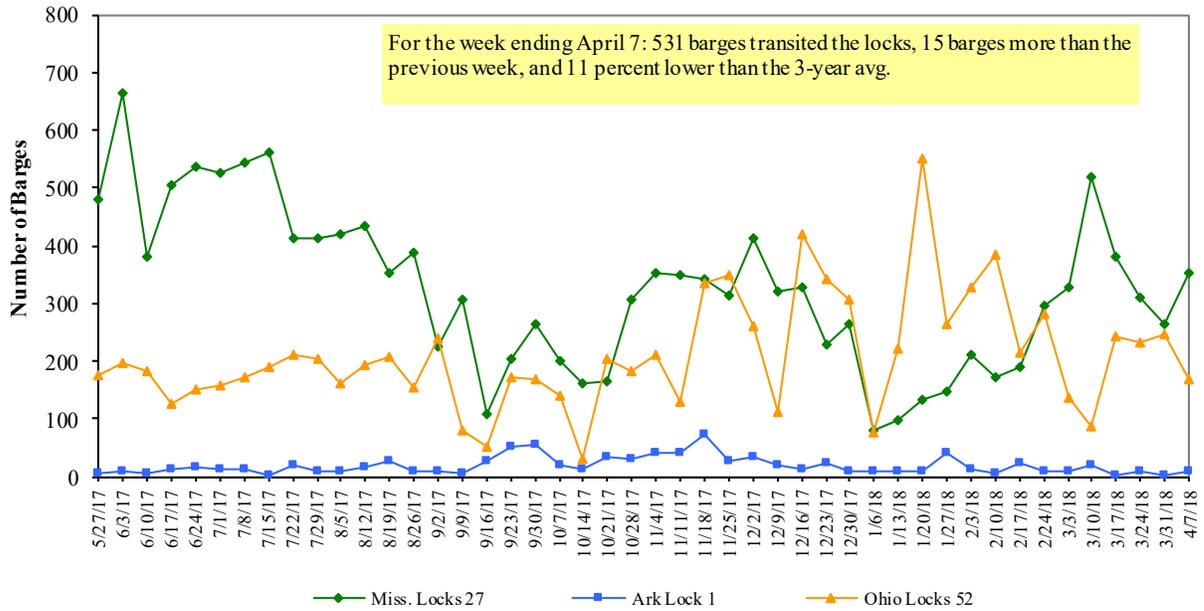
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2017.

Note: Total may not add exactly, due to rounding.

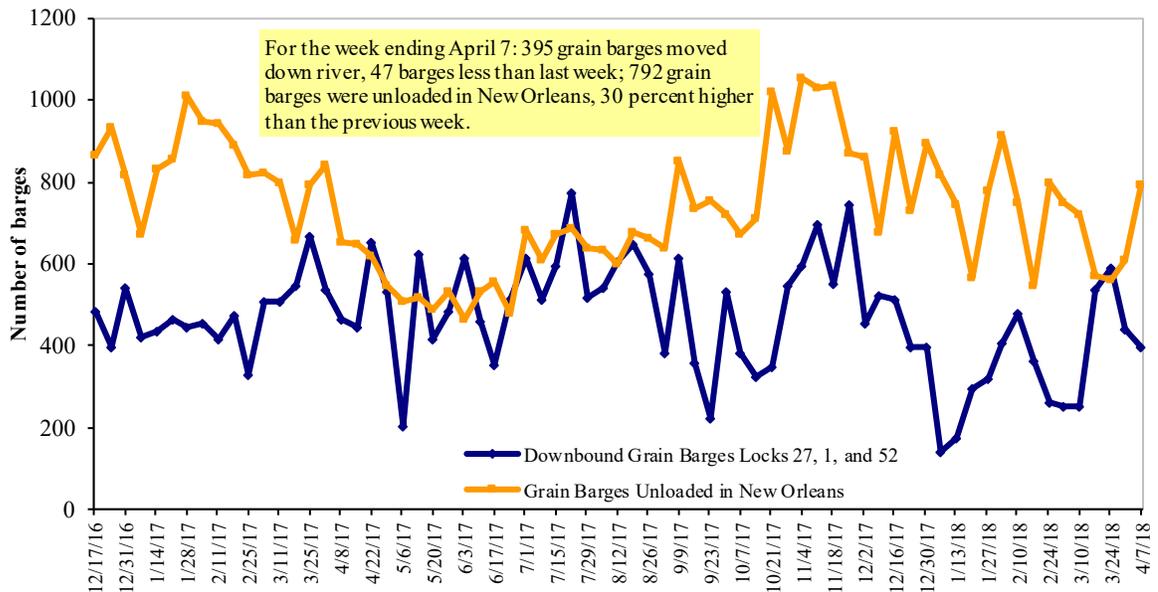
Source: U.S. Army Corps of Engineers

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 4/9/2018 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.066	0.000	0.446
	New England	3.117	0.005	0.478
	Central Atlantic	3.232	-0.001	0.471
	Lower Atlantic	2.939	0.001	0.423
II	Midwest ²	2.957	-0.005	0.442
III	Gulf Coast ³	2.844	-0.007	0.398
IV	Rocky Mountain	3.086	0.042	0.446
V	West Coast	3.500	0.013	0.638
	West Coast less California	3.226	0.024	0.454
	California	3.717	0.003	0.782
Total	U.S.	3.043	0.001	0.461

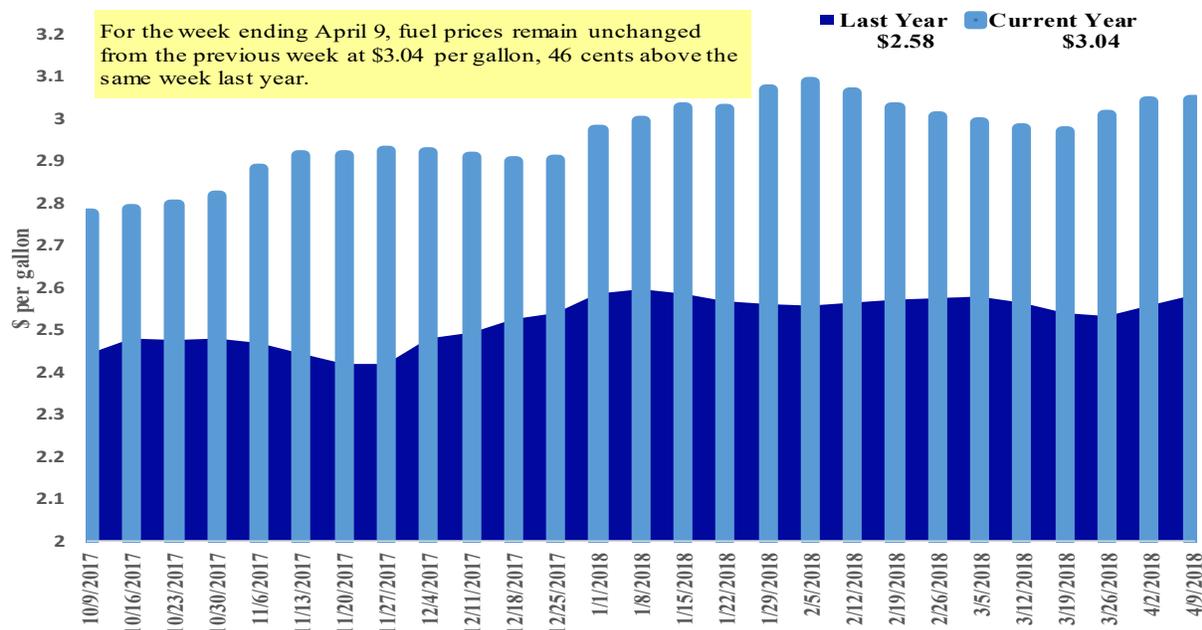
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
3/29/2018	979	534	1,442	1,006	66	4,026	23,124	9,906	37,056
This week year ago	2,027	492	1,964	1,380	109	5,972	16,434	7,754	30,160
Cumulative exports-marketing year²									
2017/18 YTD	8,002	1,871	4,554	4,156	308	18,891	24,229	41,579	84,699
2016/17 YTD	9,025	1,889	6,311	3,244	377	20,845	32,128	47,334	100,307
YTD 2017/18 as % of 2016/17	89	99	72	128	82	91	75	88	84
Last 4 wks as % of same period 2016/17	59	120	73	74	74	72	142	125	124
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 3/29/2018	Total Commitments ²		% change current MY from last MY	Exports ³ 3-year avg 2014-2016
	2017/18	2016/17		
	Current MY	Last MY		
- 1,000 mt -				
Mexico	12,090	11,629	4	12,297
Japan	8,510	8,911	(5)	11,450
Korea	3,842	4,657	(18)	4,494
Colombia	2,439	3,488	(30)	4,179
Peru	2,439	2,410	1	2,693
Top 5 Importers	29,319	31,095	(6)	35,113
Total US corn export sales	47,353	48,562	(2)	49,308
% of Projected	84%	83%		
Change from prior week²	898	1,138		
Top 5 importers' share of U.S. corn export sales	62%	64%		71%
USDA forecast, April 2018	56,616	58,346	(3)	
Corn Use for Ethanol USDA forecast, April 2018	141,605	137,973	3	

¹ Based on FAS Marketing Year Ranking Reports for 2016/17 - 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/esquery/>. 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 3/29/2018	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg. 2014-2016
	2017/18	2016/17		
	Current MY	Last MY		
	- 1,000 mt -			- 1,000 mt -
China	28,675	35,154	(18)	31,881
Mexico	3,609	3,285	10	3,452
Indonesia	1,622	1,683	(4)	1,987
Japan	1,729	1,813	(5)	2,067
Netherlands	1,185	1,260	(6)	2,098
Top 5 importers	36,820	43,195	(15)	41,486
Total US soybean export sales	51,484	55,088	(7)	52,919
% of Projected	91%	93%		
Change from prior week ²	1,133	418		
Top 5 importers' share of U.S. soybean export sales	72%	78%		78%
USDA forecast, April 2018	56,267	59,237	95	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports for 2016/17 - 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 and/or accumulated sales³ 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

For the week ending 3/29/2018	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2014-2016
	2017/18	2016/17		
	Current MY	Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,772	2,543	9	2,620
Mexico	2,797	3,063	(9)	2,743
Philippines	2,511	2,534	(1)	2,395
Brazil	111	1,184	(91)	862
Nigeria	1,186	1,402	(15)	1,254
Korea	1,420	1,251	13	1,104
China	891	1,233	(28)	1,623
Taiwan	1,107	1,038	7	768
Indonesia	1,214	1,010	20	726
Colombia	606	781	(22)	635
Top 10 importers	14,613	16,038	(9)	14,729
Total US wheat export sales	22,918	26,817	(15)	22,804
% of Projected	91%	93%		
Change from prior week ²	109	568		
Top 10 importers' share of U.S. wheat export sales	64%	60%		65%
USDA forecast, April 2018	25,204	28,747	(12)	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports for 2016/17 - 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/. Total commitments change (net sales) from prior week could include revisions from the previous week's outstanding and/or accumulated sales³ 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	For the Week Ending 04/05/18	Previous Week*	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	319	251	127	3,031	3,637	83	74	94	14,805
Corn	610	606	101	5,024	3,895	129	157	191	10,928
Soybeans	72	209	34	3,661	3,465	106	91	85	13,246
Total	1,000	1,066	94	11,715	10,997	107	112	131	38,978
Mississippi Gulf									
Wheat	118	89	133	1,225	1,247	98	124	122	4,198
Corn	1,077	665	162	8,161	10,842	75	92	121	28,690
Soybeans	167	190	88	7,712	9,281	83	58	77	32,911
Total	1,362	944	144	17,097	21,370	80	83	108	65,800
Texas Gulf									
Wheat	10	88	12	1,257	1,827	69	41	64	6,354
Corn	32	0	n/a	163	286	57	85	87	733
Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	292
Total	42	88	48	1,419	2,113	67	45	67	7,379
Interior									
Wheat	5	19	28	383	513	75	29	38	1,727
Corn	185	149	124	1,925	1,928	100	103	118	8,758
Soybeans	79	134	59	1,571	1,407	112	145	169	5,508
Total	269	302	89	3,879	3,849	101	105	123	15,993
Great Lakes									
Wheat	0	0	n/a	19	27	71	0	0	711
Corn	0	0	n/a	0	0	n/a	n/a	n/a	192
Soybeans	0	0	n/a	0	26	0	0	0	890
Total	0	0	n/a	19	53	36	0	0	1,793
Atlantic									
Wheat	0	0	n/a	64	36	176	n/a	103	46
Corn	0	0	n/a	0	5	0	0	0	32
Soybeans	75	76	99	657	670	98	217	205	2,001
Total	75	76	99	721	711	101	243	163	2,079
U.S. total from ports*									
Wheat	453	447	101	5,979	7,288	82	69	88	27,841
Corn	1,903	1,420	134	15,272	16,956	90	109	138	49,333
Soybeans	393	609	65	13,600	14,849	92	79	95	54,847
Total	2,749	2,476	111	34,851	39,093	89	92	115	132,021

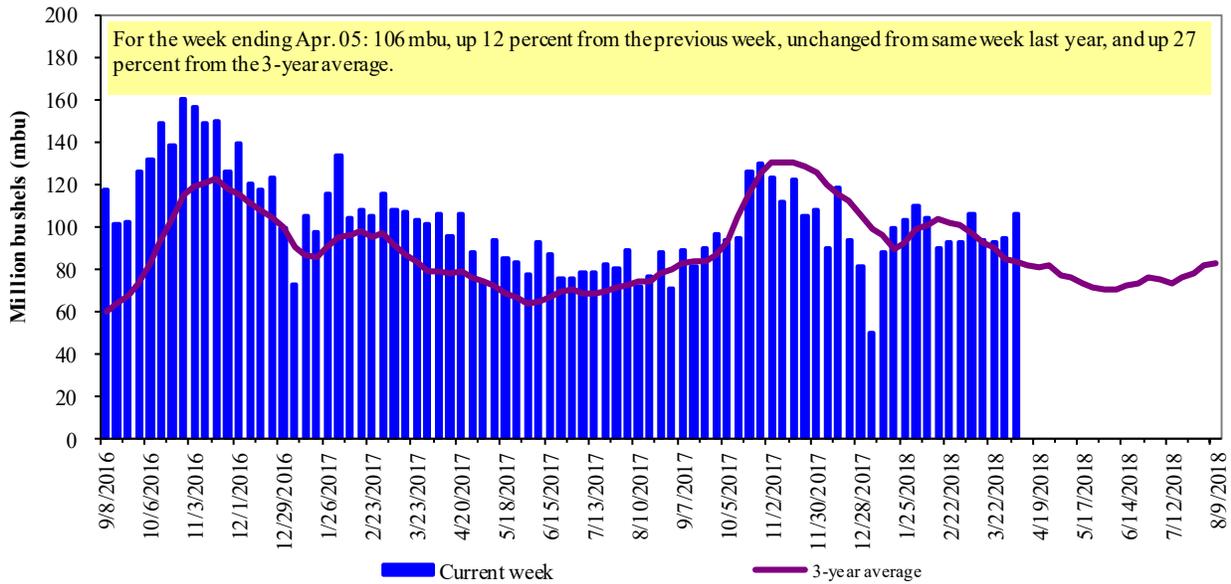
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

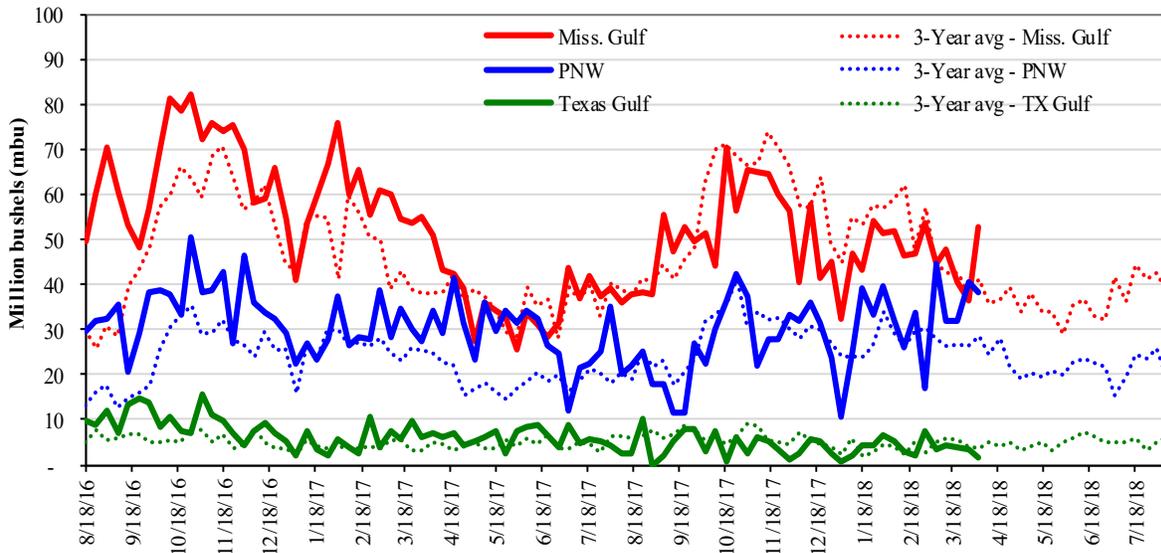


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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)



<u>Week ending 04/05/18 inspections (mbu):</u>		<u>Percent change from:</u>			
Mississippi Gulf:	52.9	Last Week:	up 45	down 50	up 37
PNW:	38.3	Last Year (same week):	up 4	down 77	down 6
Texas Gulf:	1.6	3-yr avg. (4-wk. mov. Avg):	up 29	down 66	up 19
					up 42

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

Ocean Transportation

Table 17

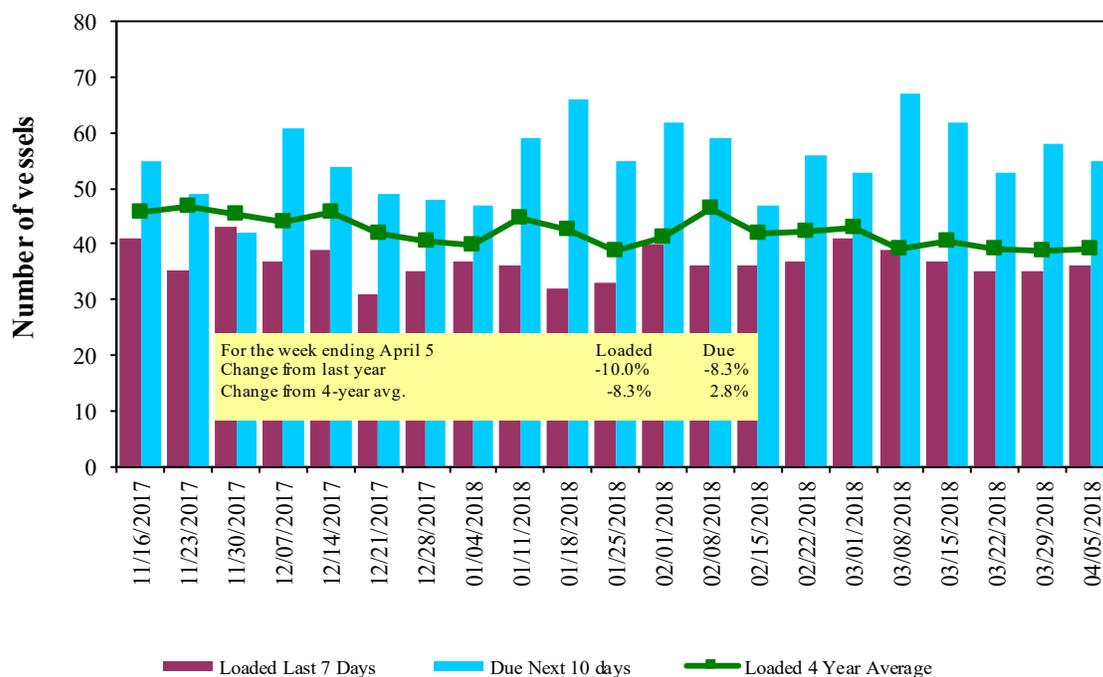
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
4/5/2018	58	36	55	23
3/29/2018	52	35	58	22
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

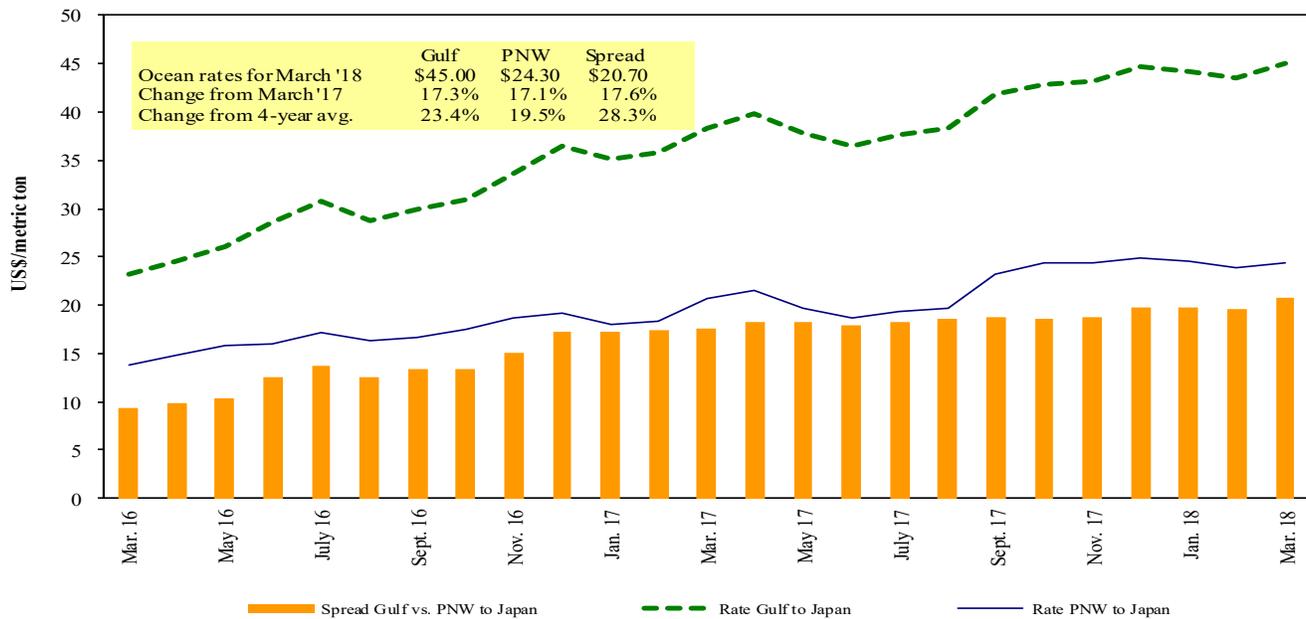
U.S. Gulf Vessel Loading Activity



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 04/07/2018

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Djibouti	Sorghum	Apr 16/26	18,200	69.87*
U.S. Gulf	Rotterdam	Heavy Grain	Apr 17/30	65,000	21.00
U.S. Gulf	Somalia	Sorghum	Apr 16/26	40,000	130.77*
PNW	Bangladesh	Wheat	Apr 6/16	43,500	46.61*
Brazil	China	Heavy Grain	May 3/31	60,000	35.50
Brazil	China	Heavy Grain	Apr 20/30	60,000	34.00
Brazil	China	Heavy Grain	Apr 3/12	66,000	36.25
Brazil	China	Heavy Grain	Mar 12/21	66,000	32.00
Brazil	China	Heavy Grain	Mar 1/10	66,000	30.00
EC S. America	China	Heavy Grain	Mar 15/24	60,000	33.50
France	Morocco	Heavy Grain	Jan 6/12	30,000	15.00
Portugal	China	Heavy Grain	Feb 10	65,000	38.00

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

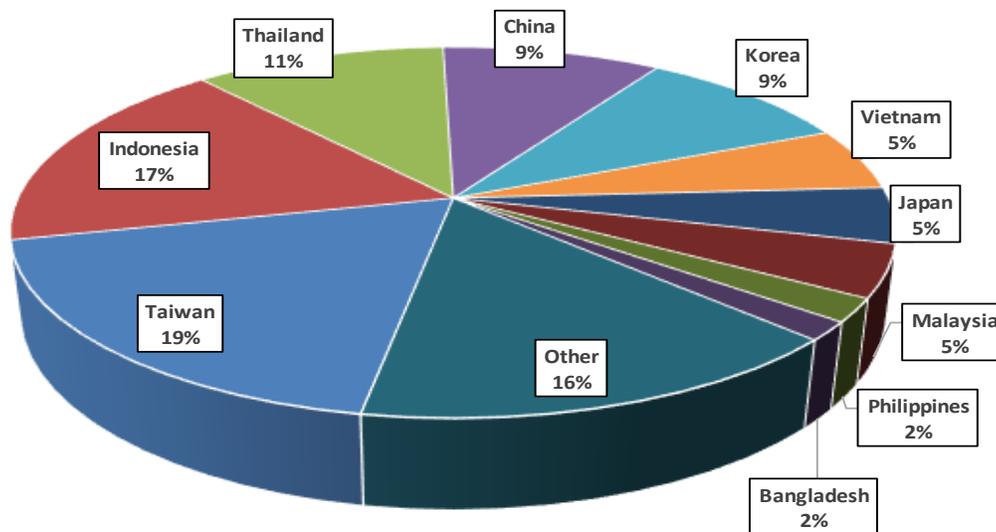
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2017, containers were used to transport 7 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2017 went to Asia, of which 10 percent were moved in containers. Approximately 93 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–December 2017

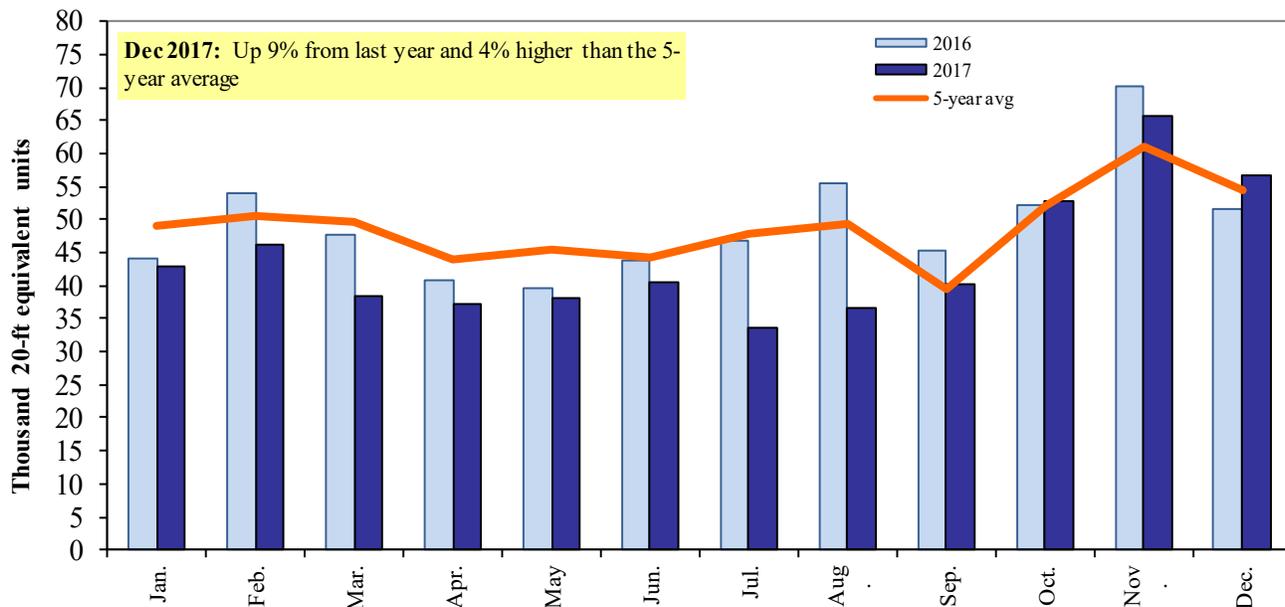


Service (PIERS) data

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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