United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
www.ams.usda.gov/GTR

Contact Us

August 2, 2018

Contents

The next release is August 9, 2018

WEEKLY HIGHLIGHTS

Corn Inspections Continue to Rise
For the week ending July 26, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.81 million metric tons (mmt); up 11 percent from the previous week, up 34 percent from last year, and 37 percent above the 3-year average. The increase in total inspections was helped primarily by a 25 percent jump in inspections of corn and a 2 percent increase in soybean inspections. Corn shipments increased to Asia and Latin America. Total wheat inspections were down 12 percent from the previous week. Week-to-week grain inspections rebounded in the Pacific Northwest and Mississippi Gulf; increasing 43 and 13 percent, respectively. However, outstanding (unshipped) export sales of corn, wheat, and soybeans, are currently below the previous week.

Weekly Barge Tonnages Recover but Face New Navigation Challenges
For the week ending July 28, corn barge tonnage on the locking portions of the Mississippi, Ohio, and Arkansas rivers were 512 thousand tons, 31 percent higher than last week. Soybean tonnages were 354 thousand tons, 76 percent higher than last week, and the second highest weekly tonnage since March. There were 923 grain barges unloaded in the New Orleans Port Region, the highest number since late November 2017. The increases mostly occurred as a result of the recovery of the Mississippi River navigation system from recent high water conditions. However, there are now significant delays, for the near term, due to repairs that have closed the main chamber at the Melvin Price Locks and Dam on the Upper Mississippi River (near East Alton, IL). The partial closure is expected to last until August 10. Industry sources indicated current delays are in the 40 to 60 hour range. As of July 31, spot barge rates, for export grain on the Upper Mississippi and Illinois rivers, have increased 19 to 22 percent compared to last week.

ASLRRA Releases Economic Impact Report
Last week, the American Short Line and Regional Railroad Association (ASLRRA) released an study, prepared by PricewaterhouseCoopers LLP, on the contribution of the short line railroad industry. There were 603 short line railroads as of 2016, operating 47,500 route miles (29 percent of the Nation's rail network). According to the report, "the short line industry directly provided 17,100 jobs in the United States in 2016, paying labor income of $1.1 billion, and adding $2.2 billion to the nation's GDP." Short lines play an important role in the movement of agricultural products, moving about 1 million carloads of grain and food products in 2015. For more on the state of the short line rail industry and its role in the grain logistics system, see this summary of a recent study, *Profile of Short Line Railroads in High Grain Production States*.

Snapshots by Sector

Export Sales
For the week ending July 19, **unshipped balances** of wheat, corn, and soybeans totaled 20.7 mmt, up 13 percent from the same time last year. Net weekly **wheat export sales** were .386 mmt, up 29 percent from the previous week. Net **corn export sales** were .339 mmt, down 47 percent from the previous week. Net **soybean export sales** were .538 mmt, up 177 percent from the previous week.

Rail
U.S. Class I railroads originated 23,767 **grain carloads** for the week ending July 21; down 4 percent from the previous week, but up 16 percent from last year, and 10 percent above the 3-year average.

Average August shuttle **secondary railcar** bids/offers per car were $175 below tariff, for the week ending July 26, down $188 from last week, and unchanged from last year. There were no non-shuttle bids/offers this week.

Barge
For the week ending July 28, **barge grain movements** totaled 904,972 tons, 39 percent higher than the previous week and up 11 percent from the same period last year.

For the week ending July 28, 589 grain barges **moved down river**, 168 barges more than the previous week. There were 923 grain barges **unloaded in New Orleans**, 15 percent higher than the previous week.

Ocean
For the week ending July 26, 38 **ocean-going grain vessels** were loaded in the Gulf, 7 percent less than the same period last year. Forty-four vessels are expected to be loaded within the next 10 days, 4 percent less than the same period last year.

For the week ending July 26, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $44.00 per metric ton, unchanged from the previous week. The cost of shipping from the PNW to Japan was $24.75 per metric ton, unchanged from the previous week.

Fuel
For the week ending July 30, fuel prices increased 0.6 cents from the previous week to $3.23 per gallon, 70 cents above the same week last year.

Containerized Grain
Containerized grain exports to Asia in May were just over 14,000 TEU; 63 percent lower than the previous year, 68 percent lower than the 5-year average, and 18 percent lower than April movements.

Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* August 2, 2018.
Web: **http://dx.doi.org/10.9752/TS056.08-02-2018**

Feature Article/Calendar

Aug. 7-9	Traffic Flow Theory and Characteristics Committee Workshop and Midyear Meeting	Woods Hole, MA	http://www.trb.org/Calendar/Blurbs/177140.aspx
Aug. 9	Informa's Transportation and Logistics Roundtable	Duluth, MN	http://www.informaecon.com/Default.asp
Aug. 10	44th Annual NOFA Summer Conference	Amherst, MA	http://nofasummerconference.org/
Aug. 28 - 30	Global Soy & Specialty Grains Conference	Kansas City, MO	https://www.grainconference.org/
Aug. 30	Inland Waterways Users Board	Paducah, KY	https://www.iwr.usace.army.mil/Missions/Navigati
Sept. 12-14	National Waterway Conference Annual Meeting	New Orleans, LA	https://waterways.org/
Sept. 13-14	National Grain Car Council Meeting/TEGMA Fall Symposium	Kansas City, MO	http://www.tegma.org/201809
Sept. 17-19	NGFA-PFI Feed & Pet Food Joint Conference	St. Louis, MO	http://feed.ngfa.org/joint-feedpet-food-conference/
Sept. 25-26	California Seed Association Mid-Year Meeting 2018	Monterey, CA	http://www.calseed.org/midyear_reg.html
Sept. 30 - Oct. 2	IAOM - Southeast Asia Region Conference	Pasay City, Manila	https://www.iaom.info/southeastasia/
Oct. 7-10	American Assoication of Port Authorities	Valparasiso, Chile	www.aapa-ports.org
Oct. 10	Pacific Northwest Waterways Assoc.	Vancouver, WA	www.pnwa.net
Oct. 22-24	Inland Distribution Conference	Oak Brook, IL	https://events.joc.com/inland-2018
Oct. 22-24	Export Exchange 2018	Minneapolis, MN	http://www.exportexchange.org/
Oct. 22-25	IAOM - Mideast & Africa Region Conference/Expo	Nairobi, Kenya	968-2471-2338
Nov. 8	AgTC Workshop	Riverside, MO	https://agtrans.org/events/
Nov. 9	AgTC Workshop	Atlanta, GA	https://agtrans.org/events/
Nov. 14-15	Kansas Agri Business Expo	Wichita, KS	http://www.ksabe.org/
Nov. 14-16	Waterways Council Annual Meeting and 15th Annual Symposium	Chicago, IL	http://waterwayscouncil.org/
Dec. 2-4	NGFACountry Elevator Conference and Trade Show	St. Louis, MO	https://www.ngfa.org/country-elevator-conference/
Dec. 5	AgTC Workshop	Minneapolis, MN	https://agtrans.org/events/

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit Train	Shuttle		Gulf	Pacific
08/01/18	217	278	209	301	197	176
07/25/18	216	277	216	247	197	176

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

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

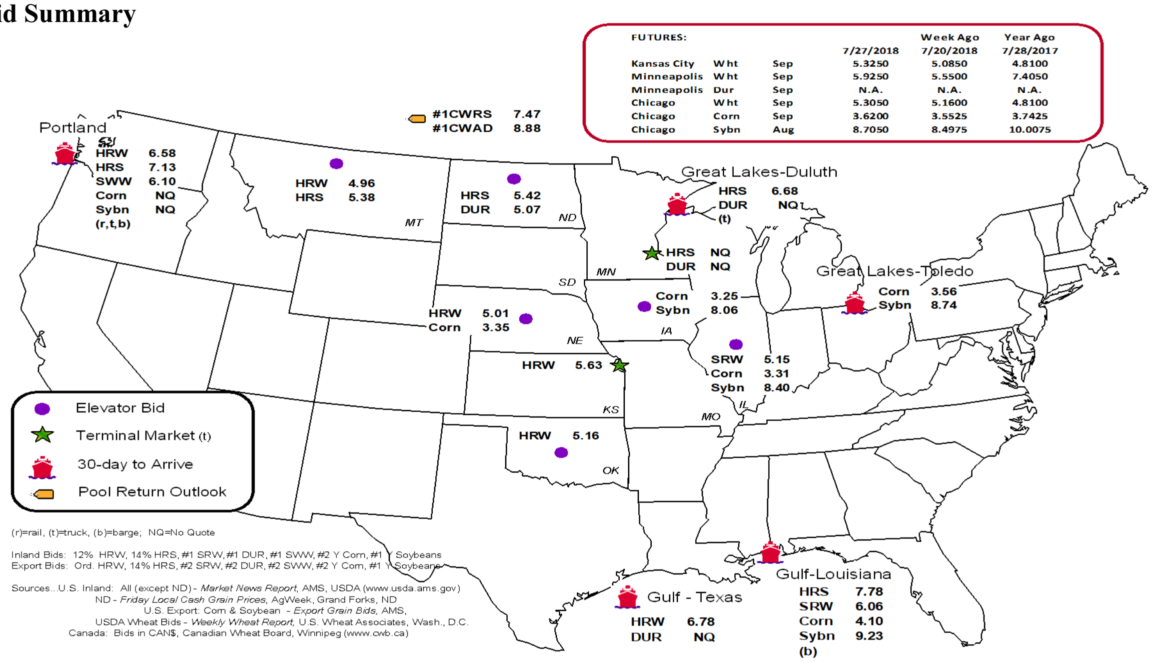
Market Update: U.S. Origins to Export Position Price Spreads ($/bushel)

Commodity	Origin--Destination	7/27/2018	7/20/2018
Corn	IL--Gulf	-0.79	-0.76
Corn	NE--Gulf	-0.75	-0.70
Soybean	IA--Gulf	-1.17	-1.13
HRW	KS--Gulf	-1.15	-1.15
HRS	ND--Portland	-1.71	1.59

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 Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-Border Mexico[3]
07/25/2018[p]	114	359	6,900	356	7,729	7/21/2018	2,888
07/18/2018[r]	127	362	7,121	436	8,046	7/14/2018	2,525
2018 YTD[r]	11,444	33,109	200,560	12,964	258,077	2018 YTD	67,678
2017 YTD[r]	15,594	53,006	175,679	12,082	256,361	2017 YTD	69,161
2018 YTD as % of 2017 YTD	73	62	114	107	101	% change YTD	98
Last 4 weeks as % of 2017[2]	86	35	144	232	124	Last 4wks % 2017	101
Last 4 weeks as % of 4-year avg.[2]	84	44	176	189	149	Last 4wks % 4 yr	123
Total 2017	28,796	76,545	289,178	21,999	416,518	Total 2017	119,661
Total 2016	36,925	88,035	299,604	29,007	453,571	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.

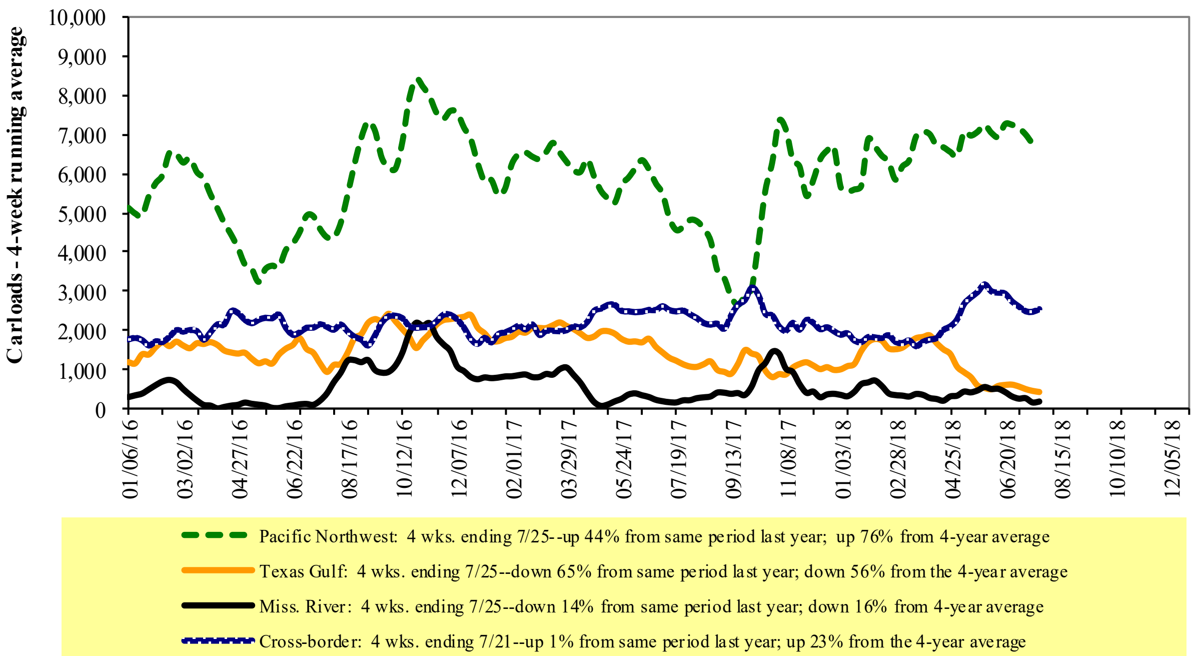
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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:	East		West			U.S. total	Canada	
7/21/2018	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,248	2,663	13,088	926	4,842	23,767	4,182	5,008
This week last year	955	2,668	10,944	398	5,443	20,408	3,413	5,204
2018 YTD	56,314	73,467	362,280	28,172	151,528	671,761	108,855	133,996
2017 YTD	50,568	81,287	331,427	27,254	171,058	661,594	109,759	131,036
2018 YTD as % of 2017 YTD	111	90	109	103	89	102	99	102
Last 4 weeks as % of 2017*	142	93	120	129	89	110	111	91
Last 4 weeks as % of 3-yr avg.**	128	94	119	126	92	110	107	99
Total 2017	89,465	142,818	578,964	50,223	289,574	1,151,044	198,582	244,766

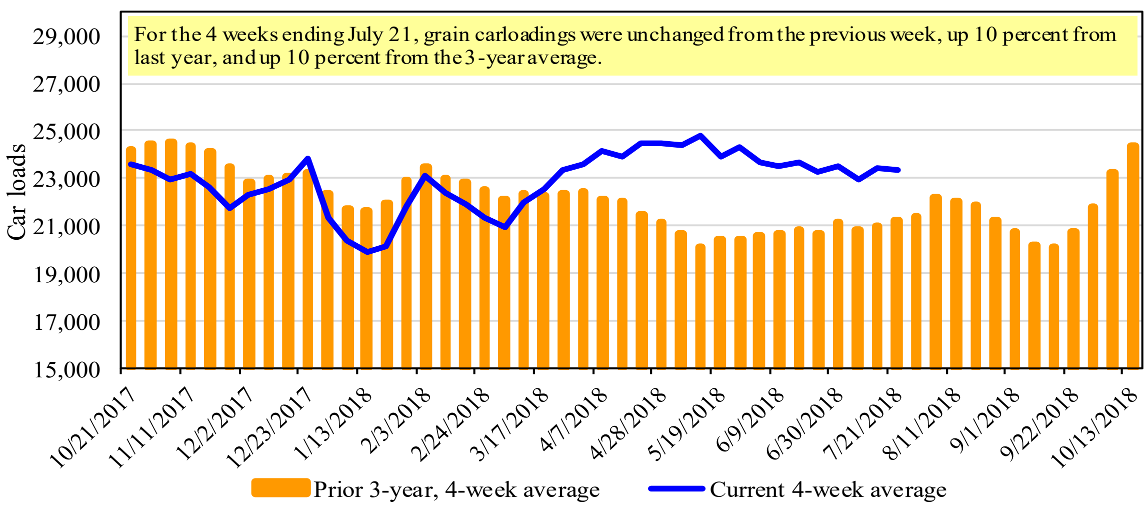
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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 Offerings[1] ($/car)[2]

For the week ending: 7/26/2018		Aug-18	Aug-17	Sep-18	Sep-17	Oct-18	Oct-17	Nov-18	Nov-17
		Delivery period							
BNSF[3]	COT grain units	no offer	0	no offer	no bids	no offer	no offer	no offer	no bids
	COT grain single-car[5]	no offer	0	no offer	0	no offer	0	no offer	0
UP[4]	GCAS/Region 1	no offer	no bids	no offer	no bids	no bid	10	n/a	n/a
	GCAS/Region 2	no offer	no bids	no offer	52	56	56	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.

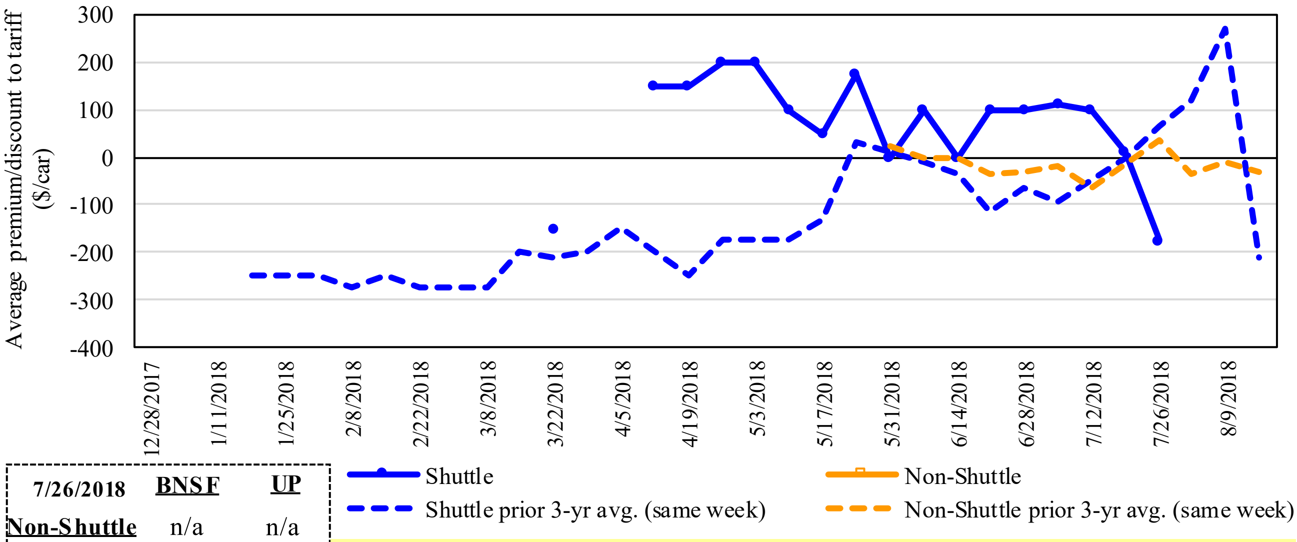
[5]Range is shown because average is not available. Not available = n/a.

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 August 2018, Secondary Market



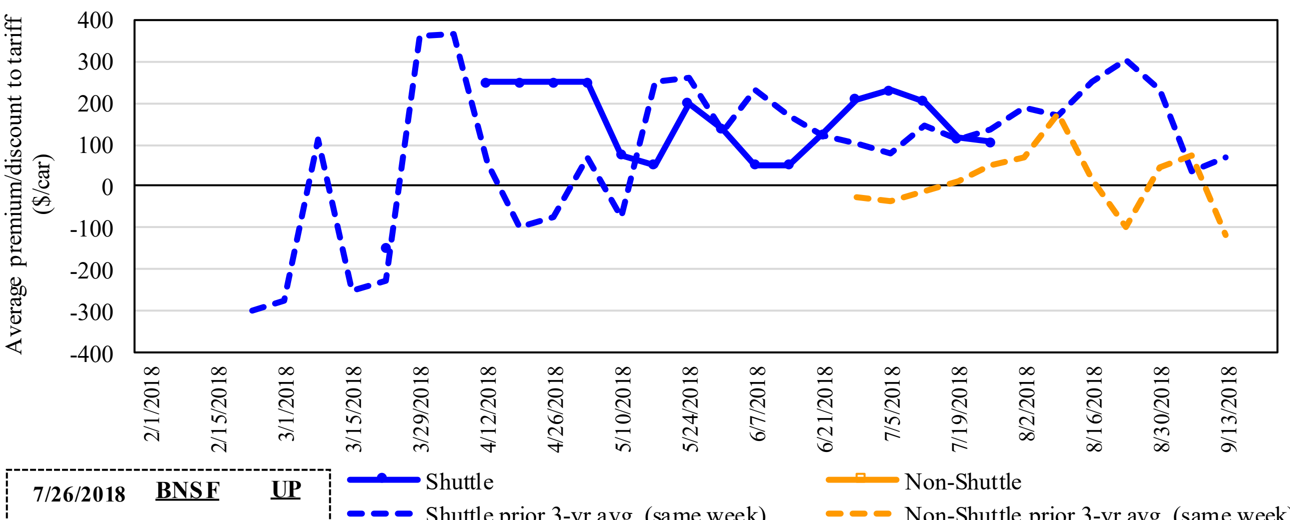
7/26/2018	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	-$175

There were no Non-Shuttle bids/offers this week.
Average Shuttle bids/offers fell $188 this week and are $375 below the peak.

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 September 2018, Secondary Market



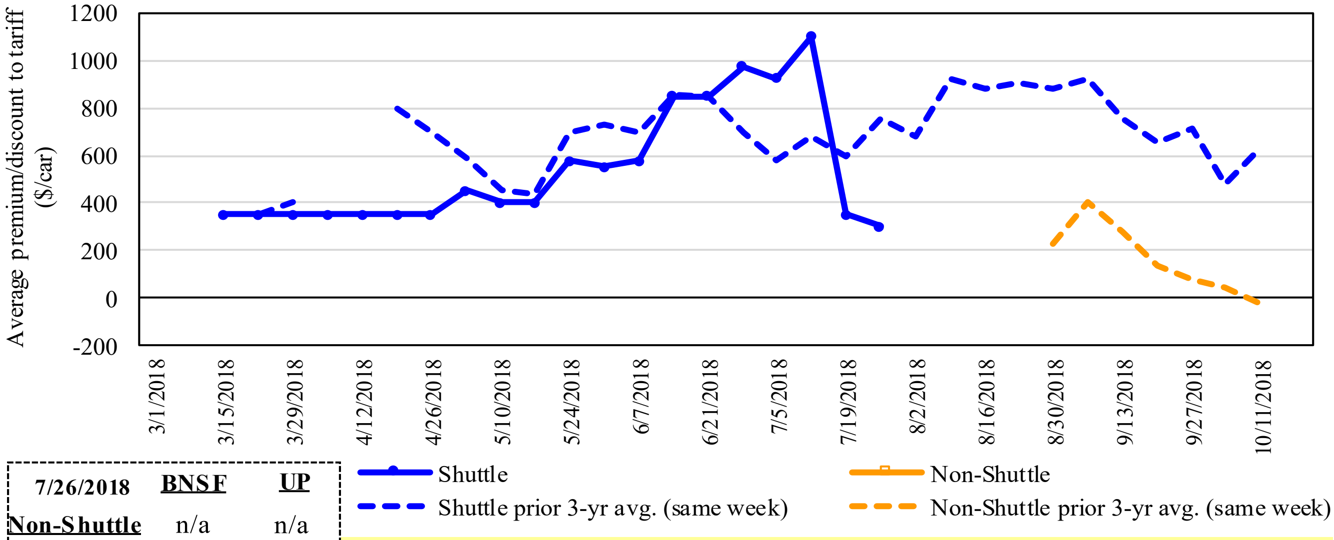
7/26/2018	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	$200	$13

There were no Non-Shuttle bids/offers this week.
Average Shuttle bids/offers fell $10 this week and are $144 below the peak.

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 October 2018, Secondary Market



7/26/2018	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	$375	$225

There were no Non-Shuttle bids/offers this week.
Average Shuttle bids/offers fell $50 this week and are $800 below 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: 7/26/2018	Delivery period: Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Jan-19
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**	**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
Shuttle	**BNSF-GF**	**n/a**	**200**	**375**	**100**	**100**	**n/a**
	Change from last week	n/a	67	(25)	n/a	n/a	n/a
	Change from same week 2017	n/a	175	(375)	0	n/a	n/a
	UP-Pool	**(175)**	**13**	**225**	**n/a**	**(50)**	**n/a**
	Change from last week	(175)	(88)	(75)	n/a	n/a	n/a
	Change from same week 2017	0	75	(125)	n/a	n/a	n/a

[1]Average 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 Shipments[1]

August, 2018	Origin region[3]	Destination region[3]	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[4]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$3,983	$121	$40.76	$1.11	4
	Grand Forks, ND	Duluth-Superior, MN	$4,268	$0	$42.38	$1.15	3
	Wichita, KS	Los Angeles, CA	$7,175	$0	$71.25	$1.94	2
	Wichita, KS	New Orleans, LA	$4,540	$214	$47.21	$1.28	3
	Sioux Falls, SD	Galveston-Houston, TX	$6,911	$0	$68.63	$1.87	2
	Northwest KS	Galveston-Houston, TX	$4,816	$234	$50.15	$1.36	3
	Amarillo, TX	Los Angeles, CA	$5,121	$326	$54.09	$1.47	6
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,931	$241	$41.43	$1.05	11
	Toledo, OH	Raleigh, NC	$6,344	$0	$63.00	$1.60	5
	Des Moines, IA	Davenport, IA	$2,258	$51	$22.93	$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	$150	$37.33	$0.95	5
	Des Moines, IA	Los Angeles, CA	$5,327	$438	$57.24	$1.45	7
Soybeans	Minneapolis, MN	New Orleans, LA	$4,131	$238	$43.39	$1.18	18
	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	$241	$49.52	$1.35	9
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$4,078	$0	$40.50	$1.10	3
	Wichita, KS	Galveston-Houston, TX	$4,296	$0	$42.66	$1.16	3
	Chicago, IL	Albany, NY	$5,663	$0	$56.24	$1.53	3
	Grand Forks, ND	Portland, OR	$5,736	$0	$56.96	$1.55	2
	Grand Forks, ND	Galveston-Houston, TX	$6,056	$0	$60.14	$1.64	2
	Northwest KS	Portland, OR	$5,912	$384	$62.52	$1.70	6
Corn	Minneapolis, MN	Portland, OR	$5,000	$0	$49.65	$1.26	0
	Sioux Falls, SD	Tacoma, WA	$4,960	$0	$49.26	$1.25	0
	Champaign-Urbana, IL	New Orleans, LA	$3,731	$241	$39.45	$1.00	11
	Lincoln, NE	Galveston-Houston, TX	$3,700	$0	$36.74	$0.93	0
	Des Moines, IA	Amarillo, TX	$3,970	$189	$41.30	$1.05	5
	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	$278	$50.18	$1.37	9
	Toledo, OH	Huntsville, AL	$4,352	$0	$43.22	$1.18	3
	Grand Island, NE	Portland, OR	$5,710	$393	$60.60	$1.65	9

[1]A 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.

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

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

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

Sources: www.bnsf.com, www.cn.ca, www.csx.com, www.up.com

Table 8

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

Date: August, 2018				Fuel			Percent
	Origin		Tariff	surcharge	Tariff plus surcharge per:		change[4]
Commodity	state	Destination region	rate/car[1]	per car[2]	metric ton[3]	bushel[3]	Y/Y
Wheat	MT	Chihuahua, CI	$7,284	$0	$74.43	$2.02	-2
	OK	Cuautitlan, EM	$6,743	$167	$70.61	$1.92	3
	KS	Guadalajara, JA	$7,371	$362	$79.01	$2.15	2
	TX	Salinas Victoria, NL	$4,292	$101	$44.89	$1.22	1
Corn	IA	Guadalajara, JA	$8,313	$338	$88.39	$2.24	3
	SD	Celaya, GJ	$7,700	$0	$78.68	$2.00	2
	NE	Queretaro, QA	$8,013	$343	$85.39	$2.17	4
	SD	Salinas Victoria, NL	$6,743	$0	$68.90	$1.75	2
	MO	Tlalnepantla, EM	$7,379	$335	$78.82	$2.00	4
	SD	Torreon, CU	$7,300	$0	$74.59	$1.89	2
Soybeans	MO	Bojay (Tula), HG	$8,134	$314	$86.32	$2.35	-5
	NE	Guadalajara, JA	$8,692	$345	$92.33	$2.51	-1
	IA	El Castillo, JA	$8,960	$0	$91.55	$2.49	0
	KS	Torreon, CU	$7,489	$258	$79.15	$2.15	2
Sorghum	NE	Celaya, GJ	$7,345	$316	$78.27	$1.99	4
	KS	Queretaro, QA	$7,819	$209	$82.03	$2.08	4
	NE	Salinas Victoria, NL	$6,452	$168	$67.63	$1.72	5
	NE	Torreon, CU	$6,790	$250	$71.93	$1.83	5

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

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

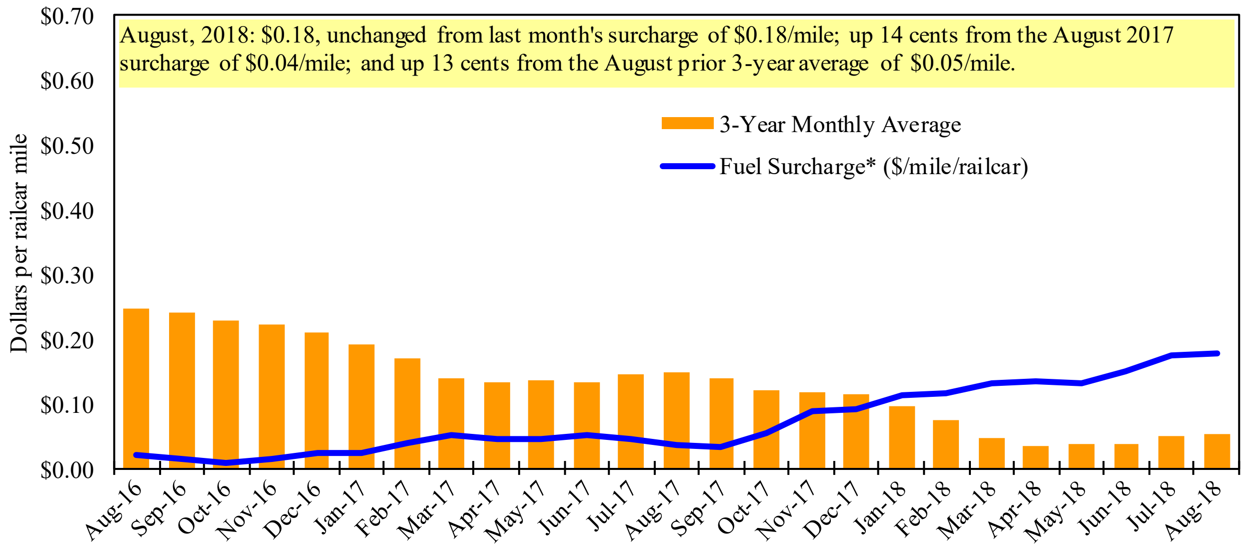
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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

Figure 7

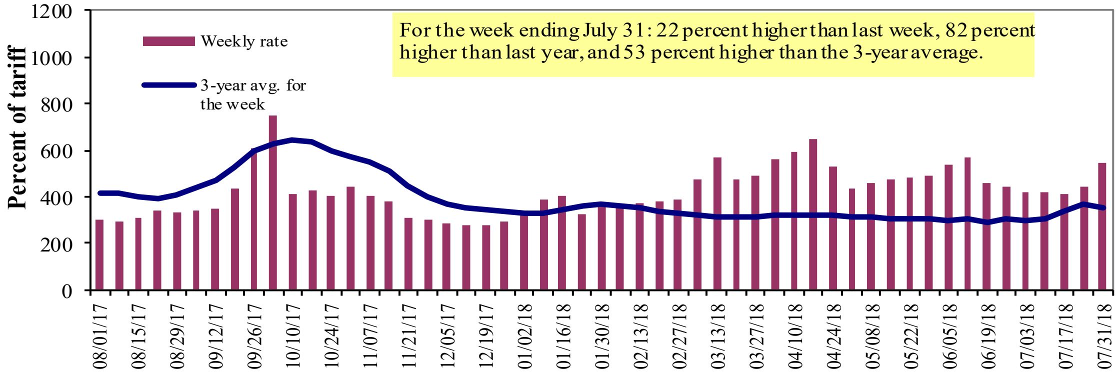
Railroad Fuel Surcharges, North American Weighted Average[1]



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



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.
Source: Transportation & Marketing Programs/AMS/USDA

Table 9
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	7/31/2018	587	542	542	375	433	433	308
	7/24/2018	492	453	445	308	388	388	282
$/ton	7/31/2018	36.34	28.83	25.15	14.96	20.31	17.49	9.67
	7/24/2018	30.45	24.10	20.65	12.29	18.20	15.68	8.85
Current week % change from the same week:								
	Last year	66	82	82	79	71	71	67
	3-year avg. [2]	38	46	53	47	54	54	39
Rate[1]	September	550	542	542	445	542	542	437
	November	542	467	450	378	425	425	338

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds;
Source: Transportation & Marketing Programs/AMS/USDA

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.

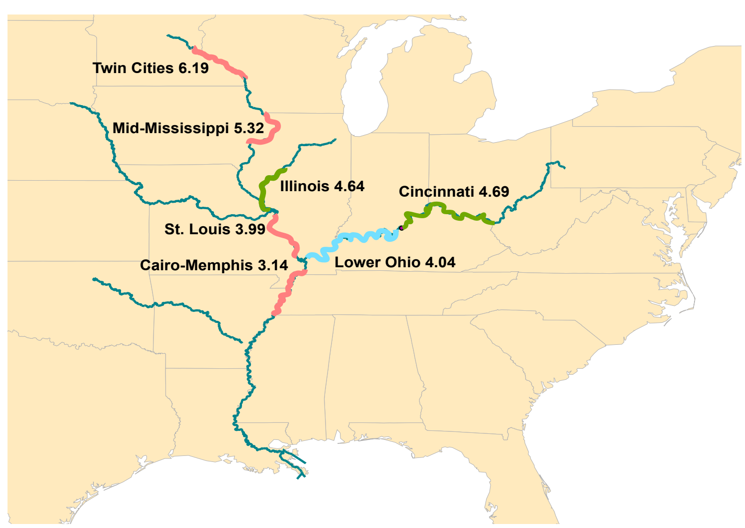
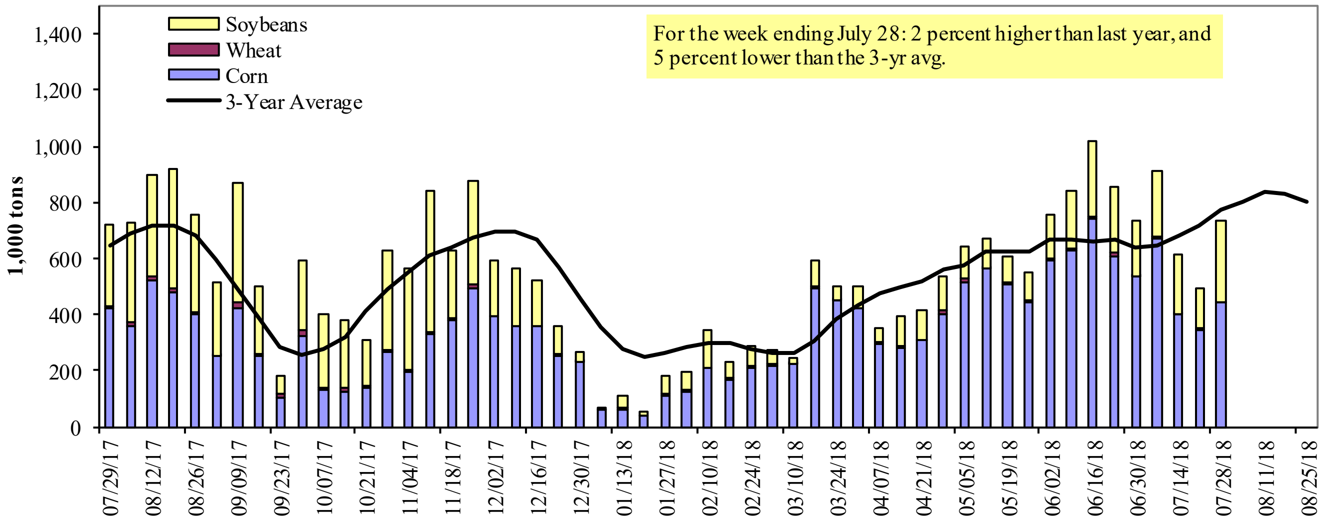


Figure 10

Barge Movements on the Mississippi River[1] (Locks 27 - Granite City, IL)



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

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

For the week ending 07/28/2018	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	255	2	124	13	393
Winfield, MO (L25)	299	0	173	13	485
Alton, IL (L26)	443	0	276	0	719
Granite City, IL (L27)	446	0	288	0	734
Illinois River (L8)	141	0	86	0	227
Ohio River (L52)	66	11	55	0	132
Arkansas River (L1)	0	28	11	0	39
Weekly total - 2018	512	39	354	0	905
Weekly total - 2017	438	49	323	8	818
2018 YTD[1]	13,938	1,046	6,796	66	21,847
2017 YTD	14,793	1,435	7,336	184	23,748
2018 as % of 2017 YTD	94	73	93	36	92
Last 4 weeks as % of 2017[2]	97	80	88	0	92
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.

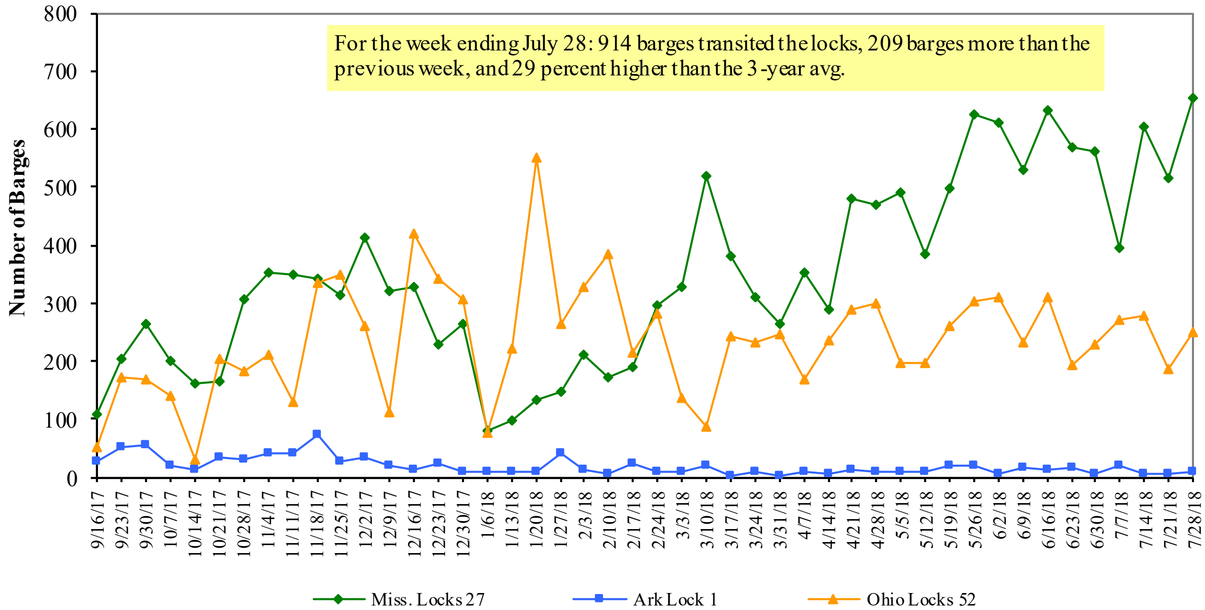
[2] As a percent of same period in 2017.

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

Source: U.S. Army Corps of Engineers

Figure 11

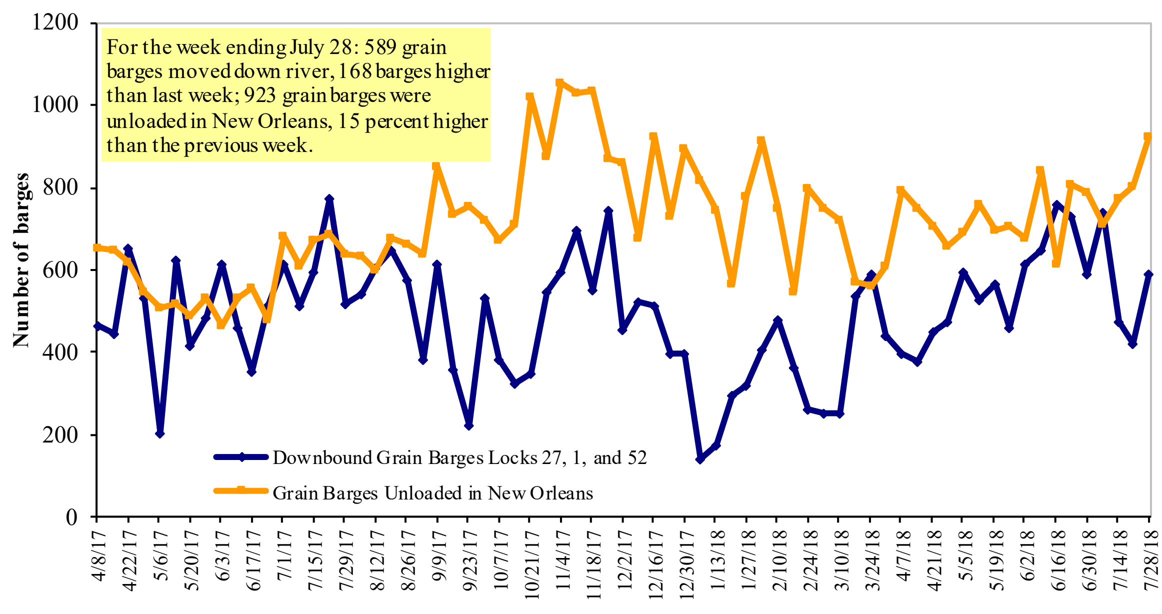
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 7/30/2018 (US $/gallon)

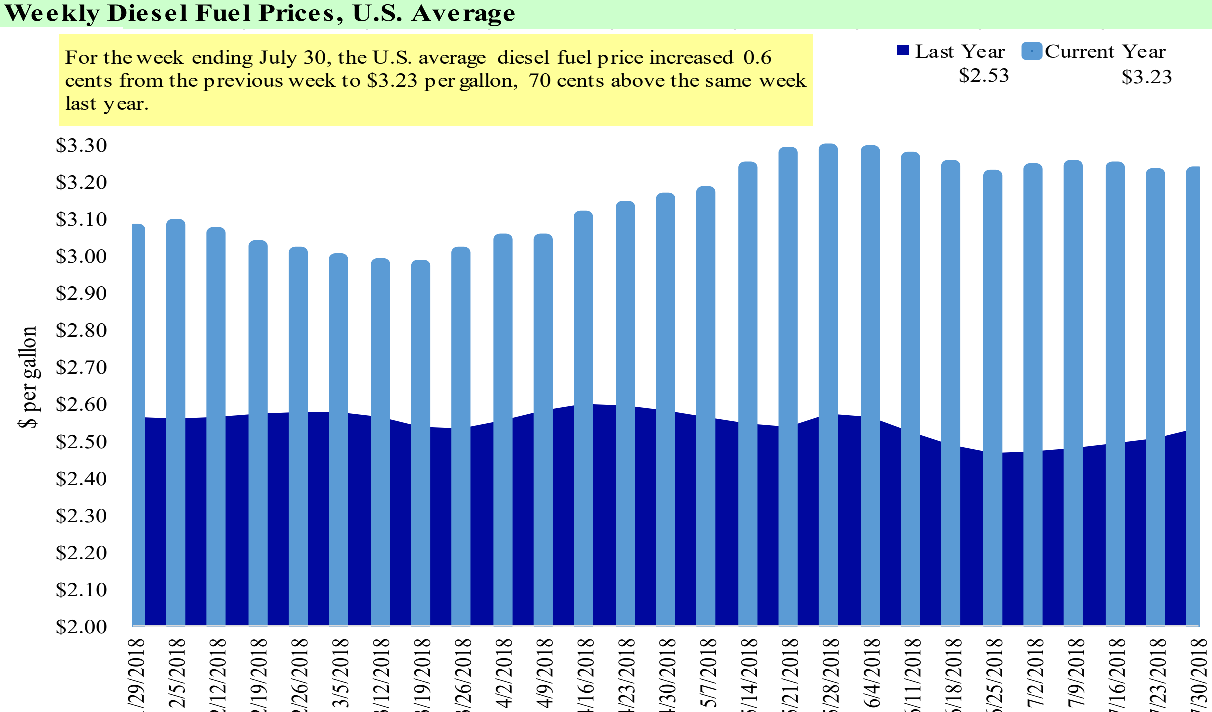
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.223	0.006	0.657
	New England	3.274	0.005	0.684
	Central Atlantic	3.390	0.001	0.684
	Lower Atlantic	3.096	0.009	0.634
II	Midwest[2]	3.156	0.014	0.670
III	Gulf Coast[3]	2.997	0.004	0.638
IV	Rocky Mountain	3.361	-0.008	0.746
V	West Coast	3.720	0.002	0.904
	West Coast less California	3.437	0.001	0.733
	California	3.945	0.002	1.038
Total	U.S.	3.226	0.006	0.695

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

[2]Same as North Central [3]Same as South Central

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

Figure 13
Weekly Diesel Fuel Prices, U.S. Average



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

Grain Exports

Table 12

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

	Wheat						Corn	Soybeans	Total
For the week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances[1]									
7/19/2018	1,019	474	1,414	1,120	177	4,204	9,937	6,526	20,667
This week year ago	1,648	707	1,479	1,726	127	5,688	6,094	6,445	18,226
Cumulative exports-marketing year[2]									
2017/18 YTD	685	394	762	761	9	2,611	49,138	51,657	103,405
2016/17 YTD	1,819	356	1,123	856	76	4,230	50,228	54,083	108,541
YTD 2017/18 as % of 2016/17	38	111	68	89	11	62	98	96	95
Last 4 wks as % of same period 2016/17	64	72	98	67	119	76	184	110	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

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

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

Table 13

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

For the week ending 7/19/2018	Total Commitments[2]			% change	Exports[3]
	2018/19	2017/18	2016/17	current MY	3-year avg
	Next MY	Current MY	Last MY	from last MY	2014-2016
		- 1,000 mt -			
Mexico	2,414	14,956	13,731	9	12,297
Japan	1,182	11,281	11,955	(6)	11,450
Korea	586	5,626	5,639	(0)	4,494
Colombia	19	4,552	4,224	8	4,179
Peru	25	3,114	3,020	3	2,693
Top 5 Importers	**4,226**	**39,530**	**38,569**	**2**	**35,113**
Total US corn export sales	**6,170**	**59,075**	**56,322**	**5**	**49,308**
% of Projected	11%	97%	96%		
Change from prior week[2]	**748**	**339**	**92**		
Top 5 importers' share of U.S. corn export sales	68%	67%	68%		71%
USDA forecast, July 2018	**56,616**	**61,069**	**58,372**	**5**	
Corn Use for Ethanol USDA forecast, July 2018	**142,875**	**142,240**	**137,973**	**3**	

(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 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 Importers[1] of U.S. Soybeans

For the week ending 7/19/2018	Total Commitments[2] 2018/19 Next MY	2017/18 Current MY	2016/17 Last MY	% change current MY from last MY	Exports[3] 3-yr avg. 2014-2016
	- 1,000 mt -				- 1,000 mt -
China	1,332	28,120	36,301	(23)	31,881
Mexico	1,132	4,418	3,740	18	3,452
Indonesia	131	2,548	2,346	9	1,987
Japan	161	2,295	2,253	2	2,067
Netherlands	0	2,261	1,788	26	2,098
Top 5 importers	**2,756**	**39,642**	**46,428**	**(15)**	**41,486**
Total US soybean export sales	**9,830**	**58,183**	**60,528**	**(4)**	**52,919**
% of Projected	18%	102%	103%		
Change from prior week[2]	**964**	**538**	**164**		
Top 5 importers' share of U.S. soybean export sales	28%	68%	77%		**78%**
USDA forecast, July 2018	**55,586**	**56,812**	**59,019**	**96**	

(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/. The total commitments change (net sales) from prior week could include reivisions from previous week's outstanding sales and/or accumulated sales

[3] FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers[1] of All U.S. Wheat

For the week ending 7/19/2018	Total Commitments[2] 2018/19 Current MY	2017/18 Last MY	% change current MY from last MY	Exports[3] 3-yr avg 2014-2016
	- 1,000 mt -			- 1,000 mt -
Japan	893	929	(4)	2,620
Mexico	617	1,384	(55)	2,743
Philippines	935	1,098	(15)	2,395
Brazil	104	93	12	862
Nigeria	288	520	(45)	1,254
Korea	667	853	(22)	1,104
China	0	391	(100)	1,623
Taiwan	281	457	(39)	768
Indonesia	131	356	(63)	726
Colombia	84	230	(64)	635
Top 10 importers	**4,001**	**6,310**	(37)	**14,729**
Total US wheat export sales	**6,814**	**9,918**	**(31)**	**22,804**
% of Projected	26%	40%		
Change from prior week[2]	**386**	**498**		
Top 10 importers' share of U.S. wheat export sales	59%	64%		65%
USDA forecast, July 2018	**26,567**	**24,550**	**8**	

(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 sales

[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	For the Week Ending 07/26/18	Previous Week*	Current Week as % of Previous	2018 YTD*	2017 YTD*	2018 YTD as % of 2017 YTD	Last 4-weeks as % of: Last Year	Prior 3-yr. avg.	2017 Total*
Pacific Northwest									
Wheat	274	207	132	7,141	9,081	79	98	110	14,805
Corn	639	462	138	13,404	9,128	147	229	184	10,928
Soybeans	140	66	211	5,659	4,808	118	223	314	13,246
Total	**1,052**	**735**	**143**	**26,204**	**23,017**	**114**	**165**	**162**	**38,978**
Mississippi Gulf									
Wheat	37	99	37	2,395	2,884	83	69	67	4,198
Corn	824	583	141	20,592	20,256	102	114	106	28,690
Soybeans	438	463	94	13,347	12,963	103	124	138	32,911
Total	**1,299**	**1,145**	**113**	**36,334**	**36,103**	**101**	**113**	**111**	**65,800**
Texas Gulf									
Wheat	63	57	110	2,051	4,354	47	25	34	6,354
Corn	0	23	0	456	455	100	166	138	733
Soybeans	0	0	n/a	67	0	n/a	n/a	n/a	292
Total	**63**	**80**	**79**	**2,574**	**4,809**	**54**	**35**	**46**	**7,379**
Interior									
Wheat	5	28	20	845	1,103	77	48	63	1,727
Corn	163	218	75	5,022	4,971	101	97	116	8,758
Soybeans	165	171	97	3,898	2,930	133	161	217	5,508
Total	**334**	**417**	**80**	**9,764**	**9,004**	**108**	**109**	**137**	**15,993**
Great Lakes									
Wheat	20	59	34	343	381	90	122	92	711
Corn	3	18	18	301	115	262	n/a	99	192
Soybeans	33	0	n/a	281	187	150	90	107	890
Total	**57**	**78**	**73**	**925**	**682**	**136**	**159**	**98**	**1,793**
Atlantic									
Wheat	0	1	0	67	38	176	308	10	46
Corn	0	0	n/a	67	5	n/a	n/a	0	32
Soybeans	3	66	5	1,277	924	138	336	368	2,001
Total	**3**	**68**	**4**	**1,411**	**966**	**146**	**336**	**192**	**2,079**
U.S. total from ports*									
Wheat	399	452	88	12,842	17,840	72	70	79	27,841
Corn	1,629	1,304	125	39,842	34,930	114	139	127	49,333
Soybeans	779	766	102	24,528	21,811	112	145	171	54,847
Total	**2,808**	**2,523**	**111**	**77,212**	**74,581**	**104**	**121**	**124**	**132,021**

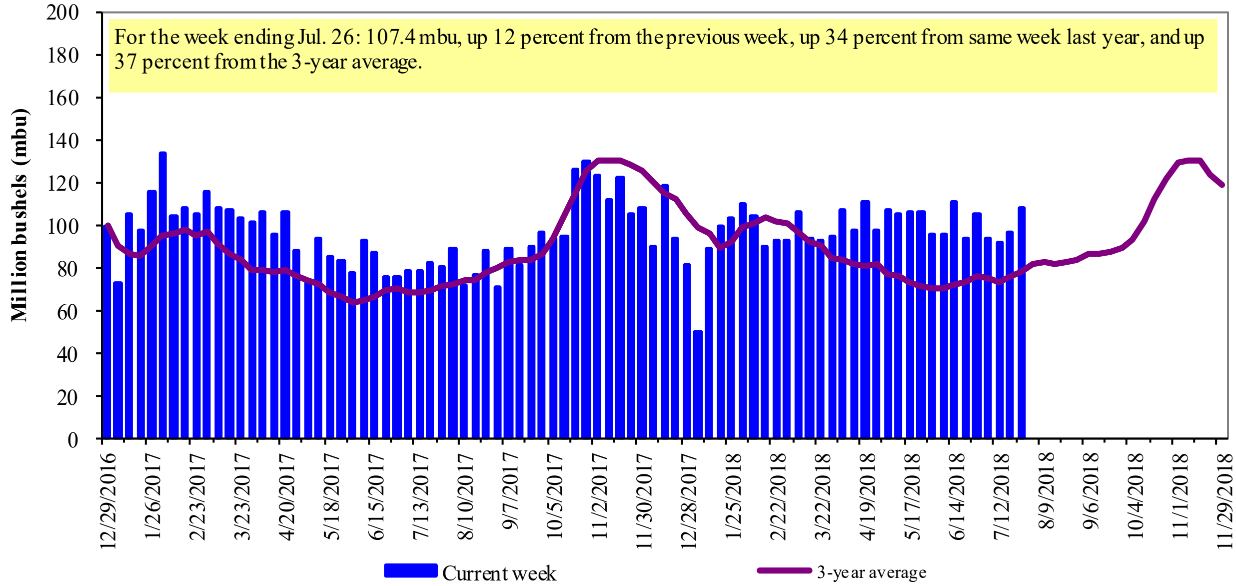
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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, 50 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)

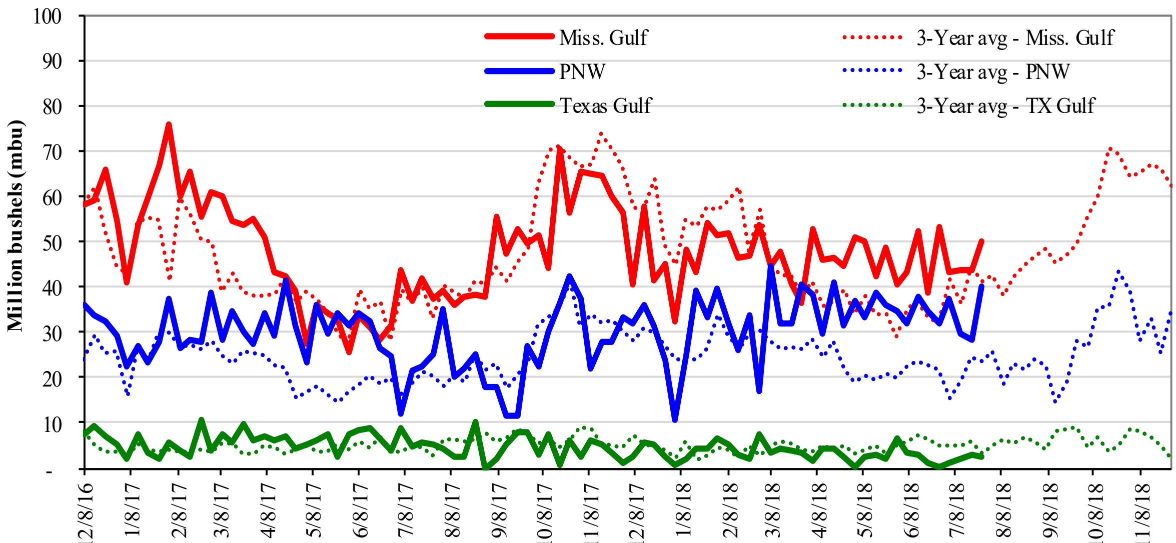


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW[1] (wheat, corn, and soybeans)



Week ending 07/26/18 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Mississippi Gulf:	49.9	Last Week:	up 14	down 23	up 12	up 43
PNW:	40.3	Last Year (same week):	up 34	down 56	up 23	up 61
Texas Gulf:	2.3	3-yr avg. (4-wk. mov. Avg):	up 22	down 51	up 15	up 94

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

Ocean Transportation

Table 17

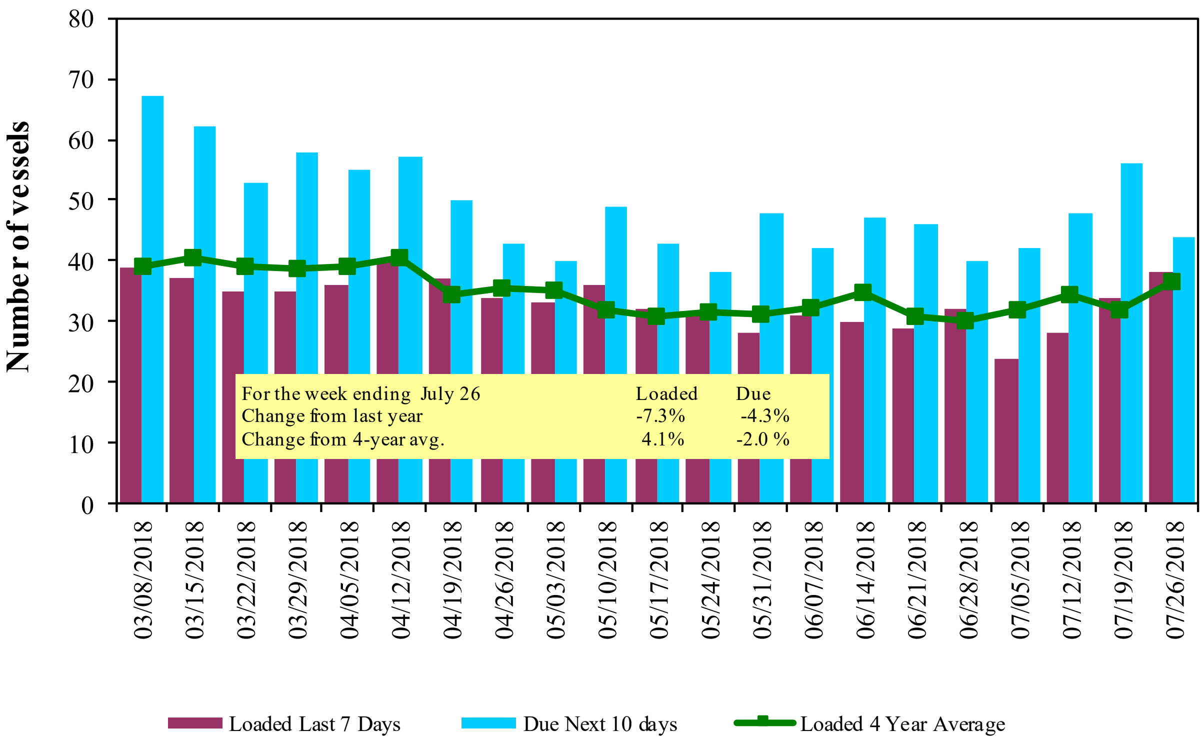
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
7/26/2018	28	38	44	13
7/19/2018	30	34	56	11
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg.	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

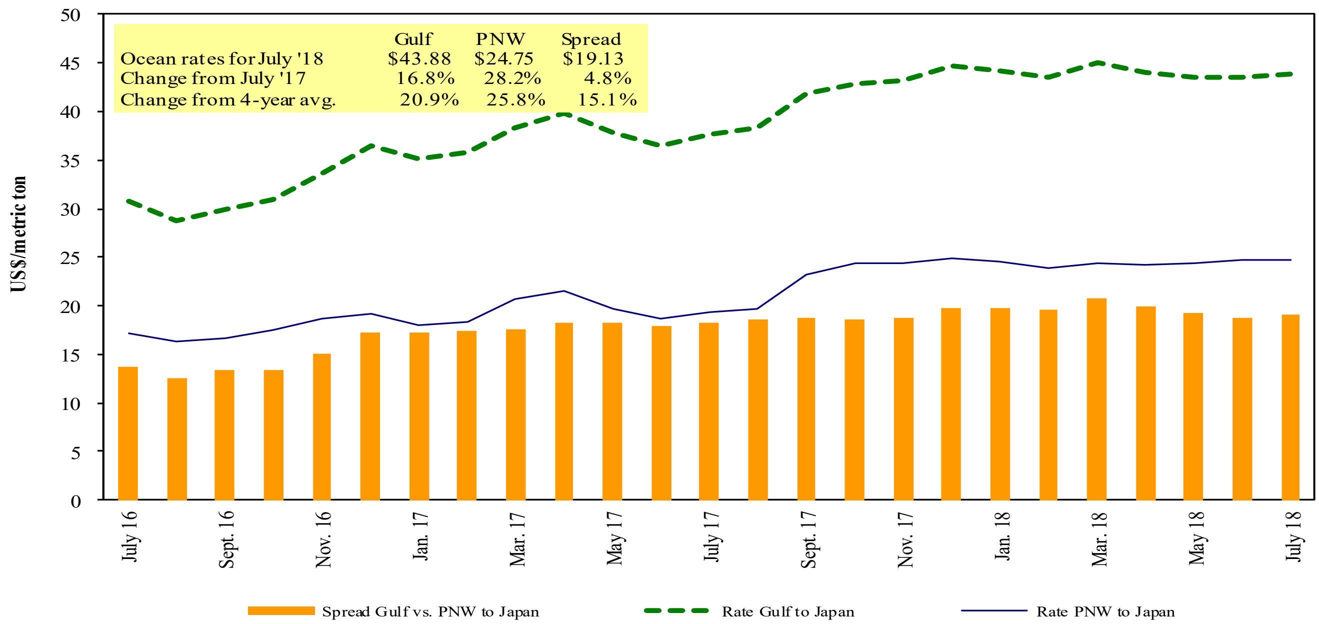
U.S. Gulf Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA
[1]U.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 07/28/2018

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Egypt	Heavy Grain	Jun 26/30	60,000	27.75
U.S. Gulf	Rotterdam	Heavy Grain	Jun 25/30	65,000	23.00
U.S. Gulf	Djibouti	Sorghum	Apr 16/26	18,200	69.87*
PNW	Yemen	Wheat	16-Aug	34,900	75.50*
PNW	Yemen	Wheat	Jul 26/Aug 9	27,500	83.70*
PNW	Bangladesh	Wheat	Apr 6/16	43,500	63.35*
Brazil	China	Heavy Grain	Aug 18/28	60,000	36.00
Brazil	China	Heavy Grain	Jul 18/28	60,000	36.00
Brazil	China	Heavy Grain	Jun 22/30	60,000	35.00
Brazil	China	Heavy Grain	Jun 22/30	60,000	33.75
Brazil	China	Heavy Grain	Jun 20/30	60,000	33.25
Brazil	China	Heavy Grain	Jun 20/26	60,000	32.50
Brazil	China	Heavy Grain	Jun 12/20	66,000	30.75
Brazil	China	Heavy Grain	May 26/Jun 2	66,000	31.50
Brazil	Malaysia	Heavy Grain	Aug 17/24	65,000	31.00

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

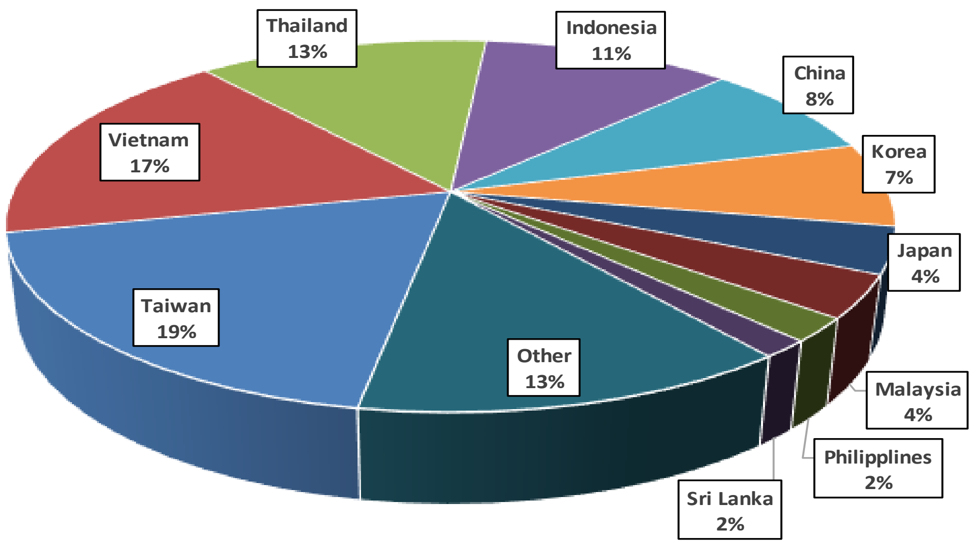
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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-May 2018

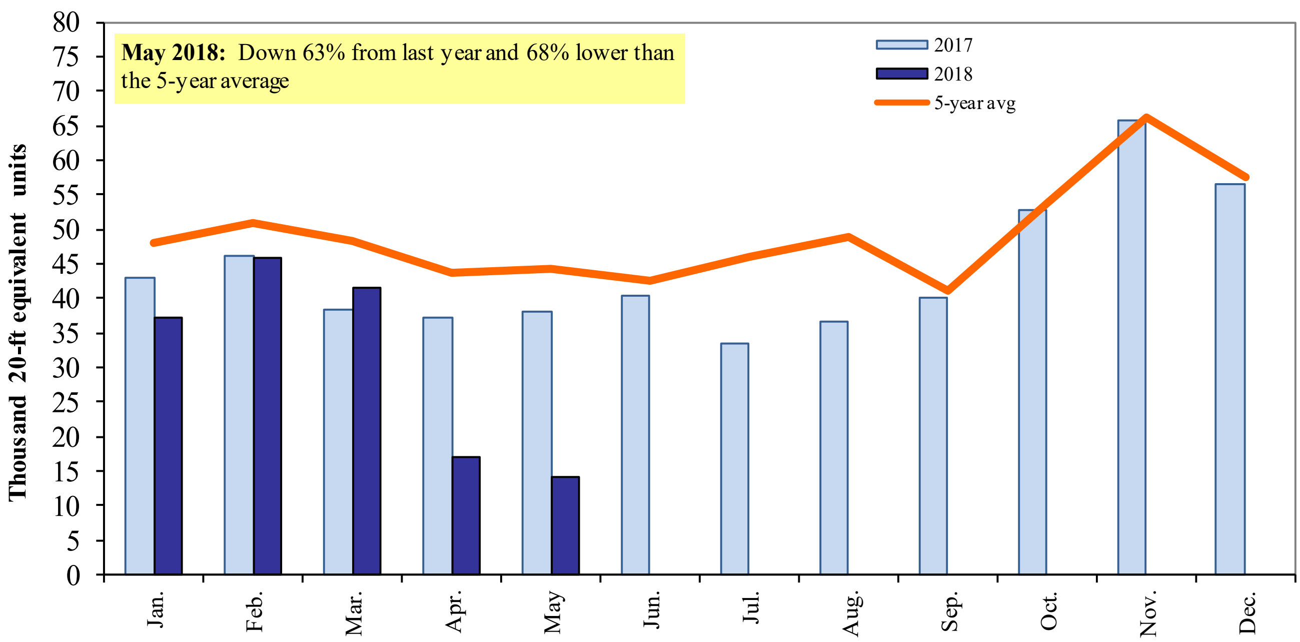


Service (PIERS) data

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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