United States Department of Agriculture

Grain Transportation Report

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

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Contents

The next release is September 28, 2017

WEEKLY HIGHLIGHTS

Dry Bulk Ocean Freight Rates Up

Ocean freight rates for shipping dry bulk commodities, including grains have been rising over the past 6 weeks. As of September 14, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $42.50 per metric ton, 15 percent increase over the past 6 weeks. The cost of shipping from the Pacific Northwest (PNW) to Japan was $23.50 per metric ton, 24 percent increase over the past 6 weeks. The Gulf-to-Japan rate has increased 21 percent since the beginning of the year and the PNW-to-Japan rate has increased 32 percent since the beginning of the year. Both rates have almost doubled since February 2016. According to the September 14 edition of *O'Neil Transportation and Export Report*, rates have increased due to strong coal and iron ore imports by China, as the Chinese government plans to reduce domestic coal mining by as much as 25 percent. However, it is yet to be seen if the higher ocean freight rates are sustainable, especially after the fall grain harvest season.

Low Water Conditions Disrupting Barge Traffic

On September 17, low water conditions closed a section of the Illinois River near La Grange Lock and Dam. The U.S. Army Corps of Engineers is planning to begin dredging the Illinois River on September 21. No completion date has been scheduled. As of September 21, there have been traffic delays at Ohio Locks and Dam 52 and 53 due to repair-related and low water conditions resulting in long waiting times for barges to transit the locks. Generally, low water conditions reduce the cargo capacity of barges causing increases in freight rates.

Grain Inspections Recede

For the week ending September 14, **total inspections of grain** (corn, wheat, and soybeans) for export from major U.S. export regions reached 2.13 million metric tons (mmt), down 10 percent from the previous week, down 21 percent from the same time last year, and 4 percent below the 3-year average. Corn inspections were unchanged from the previous week, but wheat and soybean inspections decreased 9 and 16 percent, respectively, from the previous week. Grain inspections in the PNW were down 34 percent from the past week, and Mississippi Gulf inspections dropped 14 percent for the same period. Texas Gulf grain inspections rebounded notably, jumping 170 percent from the previous week, due mainly to increased wheat and corn inspections after improvement from the recent hurricane slowdown. Outstanding (unshipped) export sales were up from the previous week for soybeans, but down for wheat, and corn.

Snapshots by Sector

Export Sales

For the week ending September 7, **unshipped balances** of wheat, corn, and soybeans totaled 21.4 mmt, up 4 percent from the same time last year. Net weekly **wheat export sales** were .317 mmt, down 15 percent from the previous week. Net **corn export sales** were 1.05 mmt, up significantly from the previous week, and net **soybean export sales** were 1.61 mmt for the same period, also up notably.

Rail

U.S. Class I railroads originated 17,445 **grain carloads** for the week ending September 9, down 4 percent from the previous week, down 23 percent from last year, and down 9 percent from the 3-year average

Average September shuttle **secondary railcar** bids/offers per car were $263 above tariff for the week ending September 14, up $133 from last week. There were no September shuttle bids/offers this week last year and no non-shuttle bids/offers this week.

Barge

For the week ending September 16, **barge grain movements** totaled 557,832 tons, 42 percent lower than the previous week, and up 6 percent from the same period last year.

For the week ending September 16, 357 grain barges **moved down river**, down 42 percent from last week, 733 grain barges were **unloaded in New Orleans**, down 14 percent from the previous week.

Ocean

For the week ending September 14, 36 **ocean-going grain vessels** were loaded in the Gulf, 22 percent less than the same period last year. Fifty-eight vessels are expected to be loaded within the next 10 days, 16 percent less than the same period last year.

For the week ending September 14, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $42.50 per metric ton, 6 percent higher than the previous week. The cost of shipping from the PNW to Japan was $23.50 per metric ton, 9 percent higher than the previous week.

Fuel

During the week ending September 18, average **diesel fuel prices** decreased almost 2 cents from the previous week at $2.79 per gallon, 40 cents above the same week last year.

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Web: **http://dx.doi.org/10.9752/TS056.09-21-2017**

Feature Article/Calendar

Second Quarter Soybean Landed Costs Fell

The landed costs of shipping soybeans from the United States and Brazil to Europe and China decreased during the second quarter, compared to the previous quarter (see tables 1 and 2). The U.S. landed costs were pushed down by a combination of lower transportation costs and farm values for shipments through the U.S. Gulf and reduced farm values for shipments through the Pacific Northwest (PNW). Lower farm values pushed down the landed costs of shipping soybeans from Brazil to both Europe and China during the same quarter.

Table 1-Quarterly costs of transporting soybeans from U.S. and Brazil to Hamburg, Germany

	2016 2nd qtr.	2017 1st qtr.	2017 2nd qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2016 2nd qtr.	2017 1st qtr.	2017 2nd qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.
	United States (via U.S. Gulf)									
	Minneapolis, MN --$/mt--					Davenport, IA --$/mt--				
Truck	12.10	11.14	12.30	1.65	10.41	12.10	11.14	12.30	1.65	10.41
Rail[1]	-	45.91	-	-	-	-	34.98	-	-	-
Barge	24.43	9.54	21.97	-10.07	130.29	17.83	9.54	15.83	-11.22	65.93
Ocean[2]	13.72	14.77	14.49	5.61	-1.90	13.75	14.77	14.49	5.38	-1.90
Total transportation	50.25	81.36	48.76	-2.97	-40.07	43.68	70.43	42.62	-2.43	-39.49
Farm Value[3]	349.92	348.82	338.16	-3.36	-3.06	349.56	353.60	335.71	-3.96	-5.06
Landed Cost[4]	400.17	430.18	386.92	-3.31	-10.06	393.24	424.03	378.33	-3.79	-10.78
Transport % of landed cost	12.56	18.91	12.60			11.11	16.61	11.27		
	Brazil									
	North MT[5] - Santos[6] --$/mt--					South GO[5] - Paranagua[6] --$/mt--				
Truck	81.75	93.30	90.63	10.86	-2.86	48.04	56.77	54.45	13.34	-4.09
Ocean[7]	17.00	21.00	24.00	41.18	14.29	17.00	22.00	25.00	47.06	13.64
Total transportation	98.75	114.30	114.63	16.08	0.29	65.04	78.77	79.45	22.16	0.86
Farm Value[8]	347.59	314.10	275.60	-20.71	-12.26	337.86	332.40	281.73	-16.61	-15.24
Landed Cost	446.34	428.40	390.23	-12.57	-8.91	402.90	411.17	361.18	-10.35	-12.16
Transport % of landed cost	22.12	26.68	29.37			16.14	19.16	22.00		

[1]Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary rail markets, which could exceed the rail tariff rate plus fuel surcharge shown in the table.
[2]Source: O'Neil Commodity Consulting
[3]Source: USDA/NASS
[4]Landed cost is total cost plus farm value
[5]Producing regions: MT= Mato Grosso, GO = Goiás
[6]Export ports
[7]Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS
[8]Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br
Note: Total may not add exactly due to rounding

The landed costs of shipping soybeans from Minneapolis, MN, and Davenport, IA, to Hamburg, Germany, through the Gulf fell by 10 and 11 percent, respectively, during the second quarter (see table 1), and the landed costs of shipping from the same origins to Shanghai, China fell by 9 and 10 percent, respectively (see table 2). The landed costs of shipping soybeans from Fargo, ND, and Sioux Falls, SD, to Shanghai, China, through the PNW decreased by 5 and 4 percent, respectively, compared to the previous quarter. The landed costs of shipping soybeans from North Mato Grosso (North MT) and South Goiás (South GO), Brazil, to Hamburg, Germany, decreased by 9 and 12 percent, respectively (see table 1). The landed costs of shipping from the same locations to Shanghai, China, decreased by 7 and 10 percent, respectively (table 2).

During the second quarter, lower farm values and reduced transportation costs pushed down the landed costs of shipping soybeans through the Gulf. Transportation costs were lower during the second quarter, because – unlike a typical first quarter – the upper segment of the Mississippi River was opened for navigation. This made it possible for grains to be shipped by barge from Davenport and Minneapolis to New Orleans for export without having to be railed to St. Louis, MO, and then transferred to barges for shipment to New Orleans (see May 25, 2017 *Grain Transportation Report*). Brazil's transportation costs were pushed up by the increase in ocean rates during the second quarter. Higher export demand, especially to China, caused ocean freight rates for shipping soybeans from Brazil to increase during the quarter. The U.S. transportation share of the landed costs ranged from 11 to 13 percent (table 1) to Europe and 16 to 21 percent to China (table 2). Brazil's transportation share of the landed costs ranged from 22 to 29 percent to Europe (table 1) and 23 to 30 percent to China (table 2).

Table 2-Quarterly costs of transporting soybeans from U.S. and Brazil to Shanghai, China

	2016 2nd qtr.	2017 1st qtr.	2017 2nd qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2016 2nd qtr.	2017 1st qtr.	2017 2nd qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.
	United States (via U.S. Gulf)									
	Minneapolis, MN					**Davenport, IA**				
	--$/mt--					--$/mt--				
Truck	12.10	11.14	12.30	1.65	10.41	12.10	11.14	12.30	1.65	10.41
Rail[1]	-	45.91	-	-	-	-	34.98	-	-	-
Barge	24.43	9.54	21.97	-10.07	130.29	17.83	9.54	15.83	-11.22	65.93
Ocean[2]	24.37	35.17	37.15	52.44	5.63	24.37	35.17	37.15	52.44	5.63
Total transportation	60.90	101.76	71.42	17.27	-29.82	54.30	90.83	65.28	20.22	-28.13
Farm Value[3]	349.92	348.82	338.16	-3.36	-3.06	349.56	353.60	335.71	-3.96	-5.06
Landed Cost[4]	410.82	450.58	409.58	-0.30	-9.10	403.86	444.43	400.99	-0.71	-9.77
Transport % of landed cost	14.82	22.58	17.44			13.45	20.44	16.28		
	Via PNW									
	Fargo, ND					**Sioux Falls, SD**				
Truck	12.10	11.14	12.30	1.65	10.41	12.40	11.14	12.30	-0.81	10.41
Rail	51.93	54.77	54.62	5.18	-0.27	52.84	55.78	55.61	5.24	-0.30
Ocean	14.26	18.27	19.01	33.31	4.05	14.26	18.27	19.01	33.31	4.05
Total transportation	78.29	84.18	85.93	9.76	2.08	79.50	85.19	86.92	9.33	2.03
Farm Value	339.02	338.16	316.61	-6.61	-6.37	336.33	340.86	324.20	-3.61	-4.89
Landed Cost	417.31	422.34	402.54	-3.54	-4.69	415.83	426.05	411.12	-1.13	-3.50
Transport % of landed cost	18.76	19.93	21.35			19.12	20.00	21.14		
	Brazil									
	North MT[5] - Santos[6]					**South GO[5] - Paranagua[6]**				
	--$/mt--					--$/mt--				
Truck	74.65	93.30	90.63	21.41	-2.86	48.04	56.77	54.45	13.34	-4.09
Ocean[7]	17.50	18.50	29.00	65.71	56.76	18.50	20.50	30.59	65.35	49.22
Total transportation	92.15	111.80	119.63	29.82	7.00	66.54	77.27	85.04	27.80	10.06
Farm Value[8]	268.28	314.10	275.60	2.73	-12.26	337.86	332.40	281.73	-16.61	-15.24
Landed Cost	360.43	425.90	395.23	9.66	-7.20	404.40	409.67	366.77	-9.31	-10.47
Transport % of landed cost	25.57	26.25	30.27			16.45	18.86	23.19		

[1]Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary rail markets, which could exceed the rail tariff rate plus fuel surcharge shown in the table.
[2]Source: O'Neil Commodity Consulting
[3]Source: USDA/NASS
[4]Landed cost is transportation cost plus farm value
[5]Producing regions: MT= Mato Grosso, GO = Goiás
[6]Export ports
[7]Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS
[8]Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br
Note: Total may not add exactly due to rounding

Market Analysis and Outlook.

China bought 1.42 million metric tons of U.S. soybeans between April and June, 870 percent more than the same period a year earlier (USDA, FAS GATS Data). The total value of the Chinese imports from the United States was $0.55 billion, 885 percent more than same period a year earlier. Despite the Chinese government's recent policy encouraging Chinese farmers to plant more oilseeds, primarily soybeans, China's rising demand for oilseeds continues to exceed the growth in domestic oilseed production (*USDA, FAS GAIN Report Number: CH17032*). China's soybean imports for marketing year (MY) 2017/18 are forecast at a record 91.5 mmt, up from the estimated 88.5 mmt in MY 2016/17. Given the current favorable prices, the United States should continue to be a major supplier of soybeans to China.
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Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

For the week ending	Truck	Rail: Unit Train	Rail: Shuttle	Barge	Ocean: Gulf	Ocean: Pacific
09/20/17	187	278	221	242	190	167
09/13/17	188	271	215	192	179	152

[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	9/15/2017	9/8/2017
Corn	IL--Gulf	-0.56	-0.59
Corn	NE--Gulf	-0.65	-0.69
Soybean	IA--Gulf	-1.24	-0.98
HRW	KS--Gulf	-2.58	-2.68
HRS	ND--Portland	-2.18	-2.16

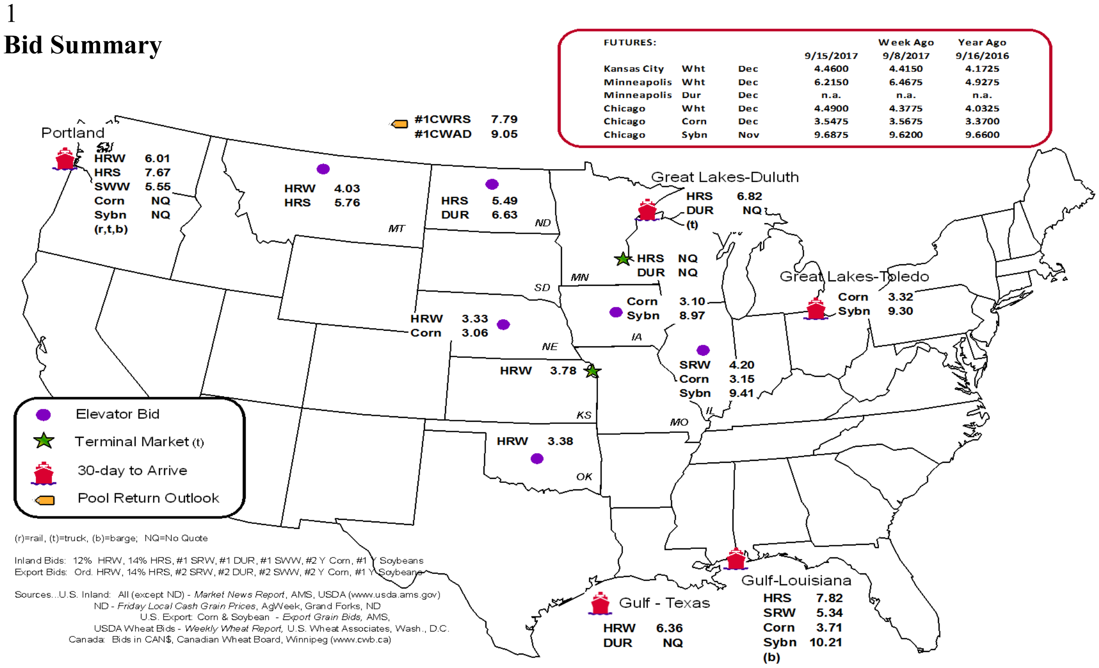
Note: nq = no quote; n/a = not available

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]
09/13/2017[p]	213	1,307	1,999	202	3,721	9/9/2017	3,300
09/06/2017[r]	321	751	2,986	229	4,287	9/2/2017	1,448
2017 YTD[r]	17,920	59,830	200,777	13,443	291,970	2017 YTD	84,988
2016 YTD[r]	15,863	56,387	192,420	12,835	277,505	2016 YTD	75,016
2017 YTD as % of 2016 YTD	113	106	104	105	105	% change YTD	113
Last 4 weeks as % of 2016[2]	39	36	41	48	40	Last 4wks % 2016	128
Last 4 weeks as % of 4-year avg.[2]	115	47	71	73	67	Last 4wks % 4 yr	137
Total 2016	36,925	86,992	299,932	28,728	452,577	Total 2016	92,982
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736

[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.

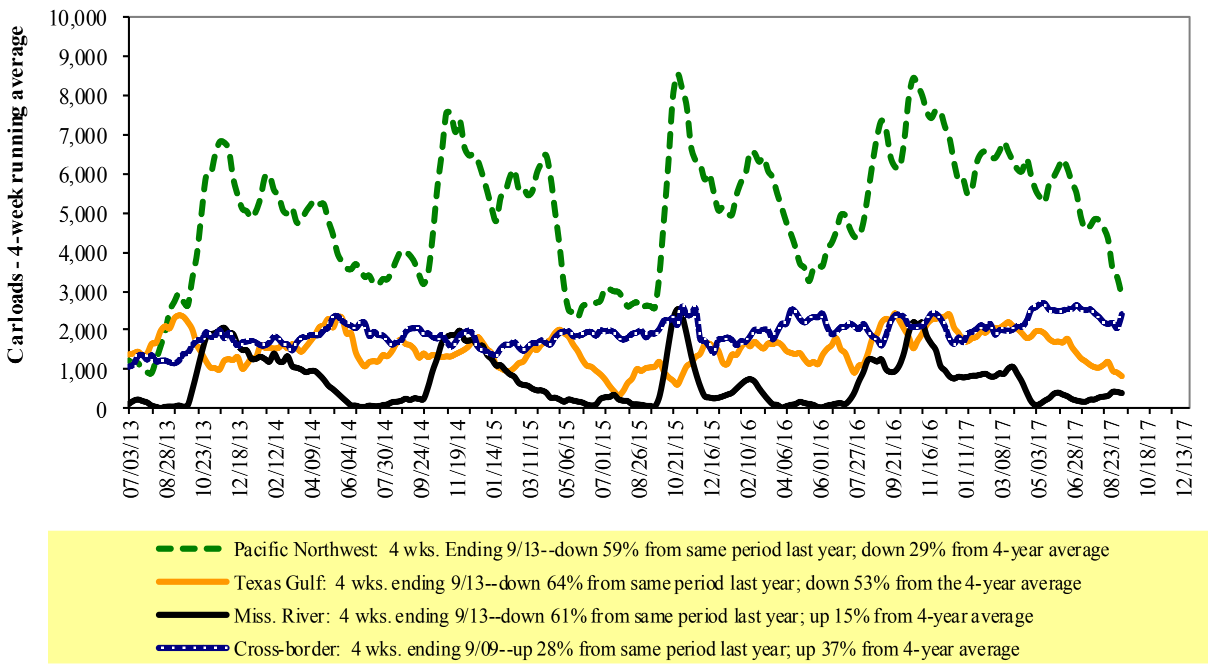
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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



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	
9/9/2017	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,053	2,692	8,719	1,017	3,964	17,445	3,623	4,152
This week last year	1,343	1,947	12,084	482	6,735	22,591	3,146	4,543
2017 YTD	59,204	99,310	398,390	33,570	205,117	795,591	135,613	163,106
2016 YTD	60,523	99,172	395,727	29,983	196,672	782,077	119,063	153,943
2017 YTD as % of 2016 YTD	98	100	101	112	104	102	114	106
Last 4 weeks as % of 2016*	83	105	71	121	78	78	115	107
Last 4 weeks as % of 3-yr avg.**	82	109	88	107	91	92	101	99
Total 2016	95,179	151,015	590,779	45,246	300,836	1,183,055	193,821	234,738

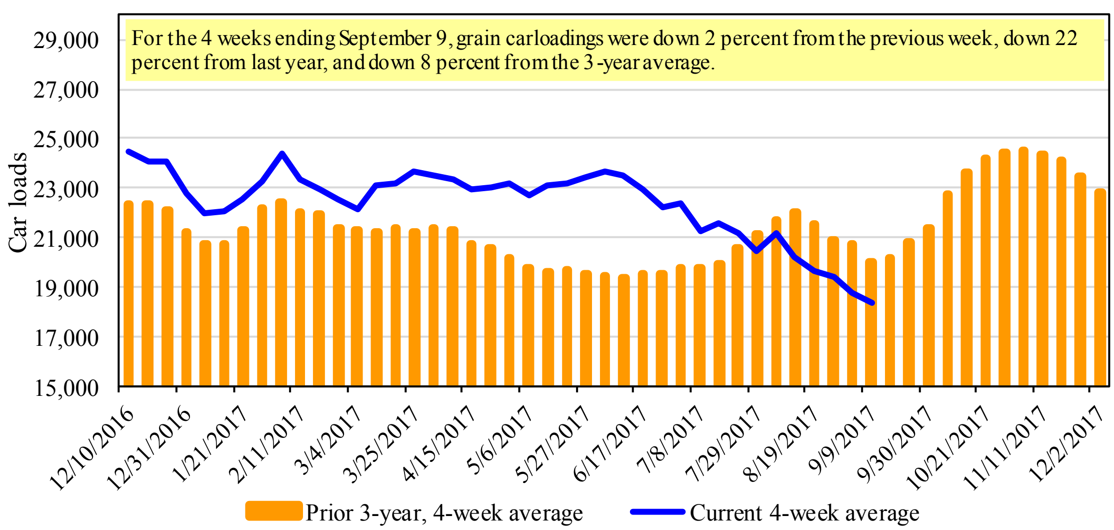
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 9/14/2017		Sep-17	Sep-16	Oct-17	Oct-16	Nov-17	Nov-16	Dec-17	Dec-16
		Delivery period							
BNSF[3]	COT grain units	0	n/a	0	no bids	no bids	no bids	no bids	no bids
	COT grain single-car[5]	0	n/a	1	281	0	185	no bids	11
UP[4]	GCAS/Region 1	no offer	n/a	10	no offer	10	no offer	n/a	no offer
	GCAS/Region 2	no offer	n/a	10	no offer	no bids	no offer	n/a	no offer

[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.

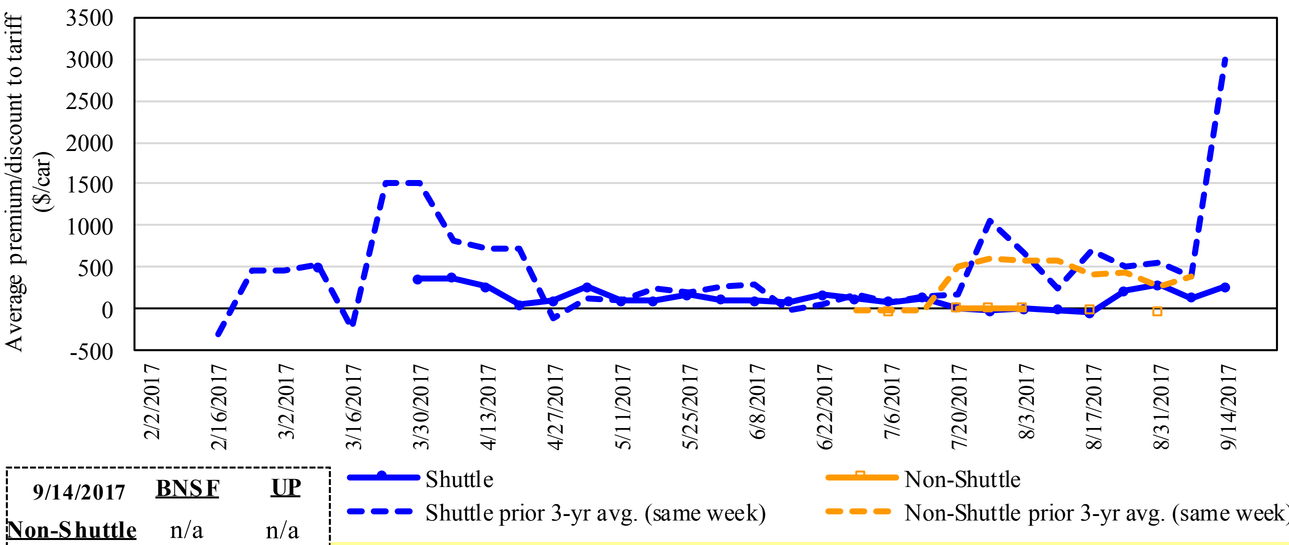
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

[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 September 2017, Secondary Market

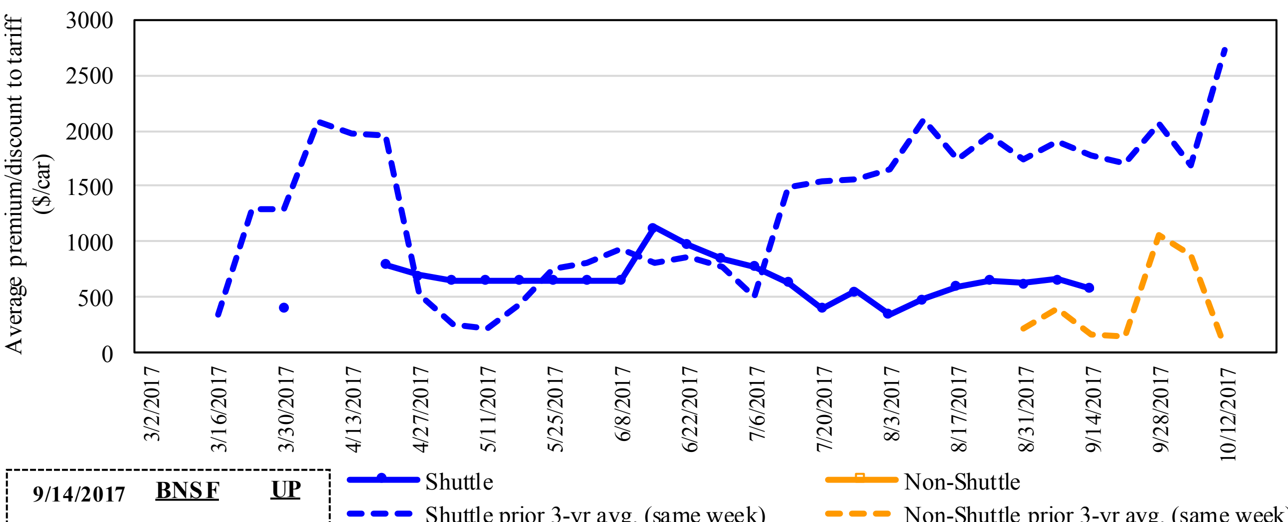


9/14/2017	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	$225	$300

There were no Non-Shuttle bids/offers this week.
Average Shuttle bids/offers rose $133 this week and are $238 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 October 2017, Secondary Market



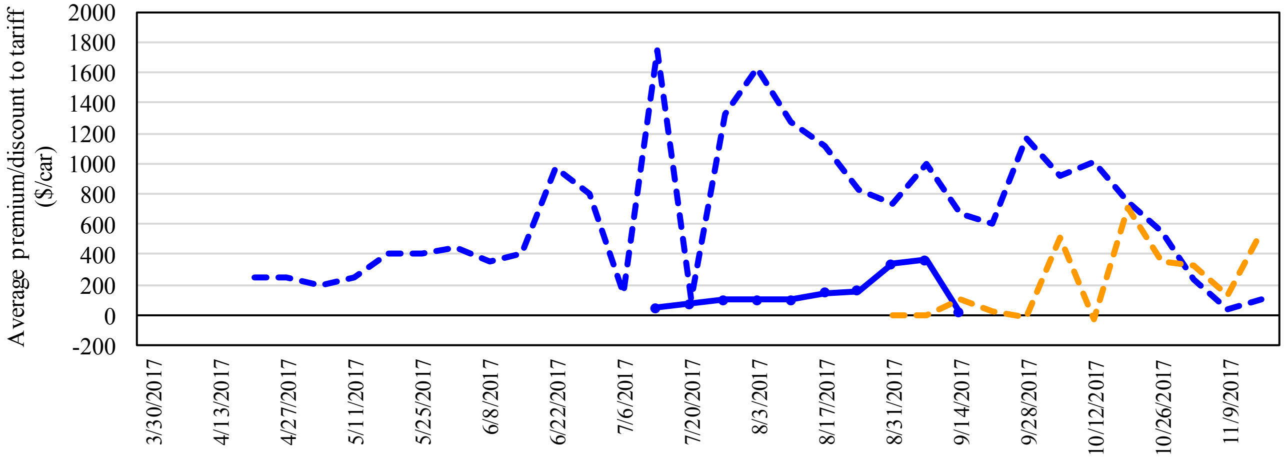
9/14/2017	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	$763	$400

There were no Non-Shuttle bids/offers this week.
Average Shuttle bids/offers fell $81 this week and are $544 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 November 2017, Secondary Market



9/14/2017	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	$25	$0

There were no Non-Shuttle bids/offers this week.
Average Shuttle bids/offers fell $350 this week and are $350 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: 9/14/2017	Delivery period: Sep-17	Oct-17	Nov-17	Dec-17	Jan-18	Feb-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 2016	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 2016	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**225**	**763**	**25**	**(50)**	**n/a**	**n/a**
	Change from last week	192	(213)	(575)	25	n/a	n/a
	Change from same week 2016	n/a	(813)	n/a	n/a	n/a	n/a
	UP-Pool	**300**	**400**	**0**	**(100)**	**n/a**	**n/a**
	Change from last week	75	50	(125)	0	n/a	n/a
	Change from same week 2016	n/a	(600)	(300)	(200)	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]

September, 2017	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	$3,883	$40	$38.96	$1.06	8
	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	$71	$45.79	$1.25	7
	Sioux Falls, SD	Galveston-Houston, TX	$6,786	$0	$67.39	$1.83	5
	Northwest KS	Galveston-Houston, TX	$4,816	$78	$48.60	$1.32	7
	Amarillo, TX	Los Angeles, CA	$5,021	$109	$50.94	$1.39	7
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,681	$80	$37.35	$0.95	0
	Toledo, OH	Raleigh, NC	$6,061	$0	$60.19	$1.53	0
	Des Moines, IA	Davenport, IA	$2,258	$17	$22.59	$0.57	4
	Indianapolis, IN	Atlanta, GA	$5,191	$0	$51.55	$1.31	4
	Indianapolis, IN	Knoxville, TN	$4,311	$0	$42.81	$1.09	0
	Des Moines, IA	Little Rock, AR	$3,534	$50	$35.59	$0.90	3
	Des Moines, IA	Los Angeles, CA	$5,202	$146	$53.11	$1.35	3
Soybeans	Minneapolis, MN	New Orleans, LA	$3,634	$52	$36.61	$1.00	-4
	Toledo, OH	Huntsville, AL	$5,051	$0	$50.16	$1.37	0
	Indianapolis, IN	Raleigh, NC	$6,178	$0	$61.35	$1.67	0
	Indianapolis, IN	Huntsville, AL	$4,529	$0	$44.98	$1.22	0
	Champaign-Urbana, IL	New Orleans, LA	$4,495	$80	$45.44	$1.24	2
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	8
	Chicago, IL	Albany, NY	$5,492	$0	$54.54	$1.48	0
	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	$128	$58.99	$1.61	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	$3,481	$80	$35.37	$0.90	0
	Lincoln, NE	Galveston-Houston, TX	$3,700	$0	$36.74	$0.93	3
	Des Moines, IA	Amarillo, TX	$3,895	$63	$39.30	$1.00	3
	Minneapolis, MN	Tacoma, WA	$5,000	$0	$49.65	$1.26	0
	Council Bluffs, IA	Stockton, CA	$4,740	$0	$47.07	$1.20	2
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,600	$0	$55.61	$1.51	2
	Minneapolis, MN	Portland, OR	$5,650	$0	$56.11	$1.53	3
	Fargo, ND	Tacoma, WA	$5,500	$0	$54.62	$1.49	2
	Council Bluffs, IA	New Orleans, LA	$4,525	$93	$45.86	$1.25	2
	Toledo, OH	Huntsville, AL	$4,226	$0	$41.97	$1.14	0
	Grand Island, NE	Portland, OR	$5,460	$131	$55.52	$1.51	2

[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

Commodity	Origin state	Destination region	Tariff rate/car[1]	Fuel surcharge per car[2]	Tariff plus surcharge per: metric ton[3]	bushel[3]	Percent change[4] Y/Y
Date: September, 2017							
Wheat	MT	Chihuahua, CI	$7,459	$0	$76.21	$2.07	0
	OK	Cuautitlan, EM	$6,631	$56	$68.32	$1.86	2
	KS	Guadalajara, JA	$7,309	$243	$77.16	$2.10	6
	TX	Salinas Victoria, NL	$4,292	$33	$44.20	$1.20	4
Corn	IA	Guadalajara, JA	$8,187	$193	$85.62	$2.17	2
	SD	Celaya, GJ	$7,580	$0	$77.45	$1.97	1
	NE	Queretaro, QA	$7,909	$112	$81.96	$2.08	1
	SD	Salinas Victoria, NL	$6,635	$0	$67.79	$1.72	1
	MO	Tlalnepantla, EM	$7,268	$109	$75.38	$1.91	1
	SD	Torreon, CU	$7,180	$0	$73.36	$1.86	1
Soybeans	MO	Bojay (Tula), HG	$8,647	$204	$90.43	$2.46	1
	NE	Guadalajara, JA	$8,942	$206	$93.46	$2.54	-1
	IA	El Castillo, JA	$8,960	$0	$91.55	$2.49	-5
	KS	Torreon, CU	$7,489	$136	$77.90	$2.12	1
Sorghum	NE	Celaya, GJ	$7,164	$171	$74.94	$1.90	-1
	KS	Queretaro, QA	$7,608	$70	$78.44	$1.99	1
	NE	Salinas Victoria, NL	$6,213	$56	$64.05	$1.63	1
	NE	Torreon, CU	$6,607	$123	$68.77	$1.75	0

[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

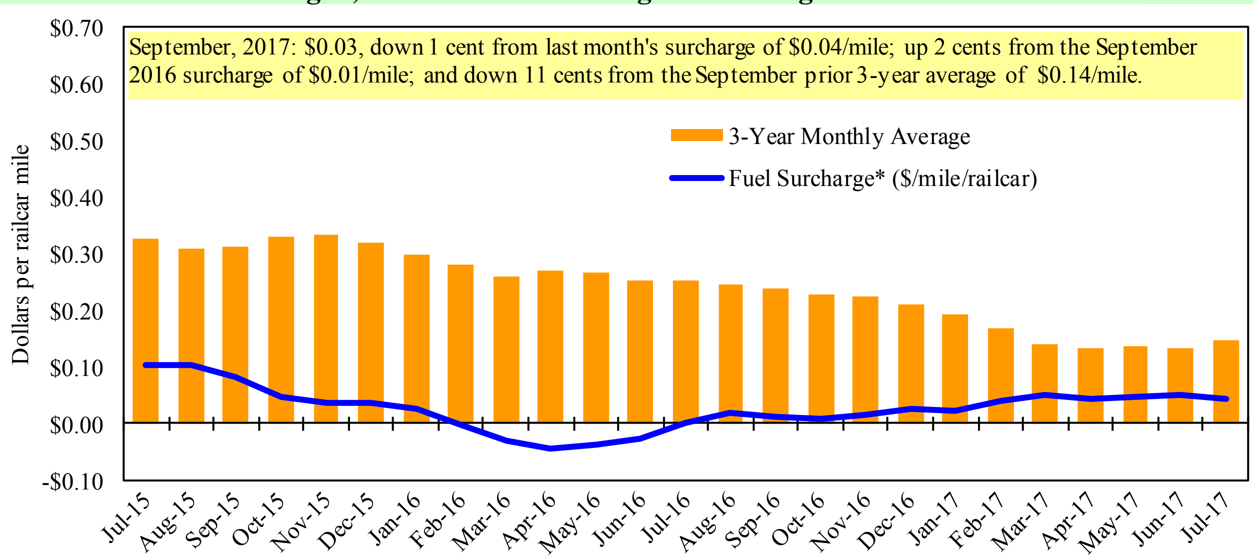
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[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.

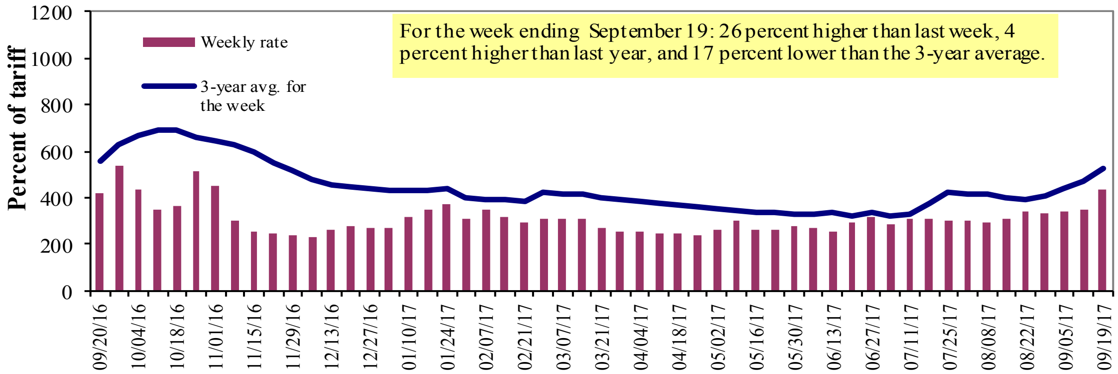
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

**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]	9/19/2017	473	433	435	375	439	439	318
	9/12/2017	393	345	345	258	-	-	250
$/ton	9/19/2017	29.28	23.04	20.18	14.96	20.59	17.74	9.99
	9/12/2017	24.33	18.35	16.01	10.29	-	-	7.85
Current week % change from the same week:								
	Last year	0	-2	4	20	2	2	2
	3-year avg. [2]	-10	-16	-17	-22	-17	-17	-33
Rate[1]	October	513	475	478	400	480	480	342
	December	-	-	340	295	330	330	255

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-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.

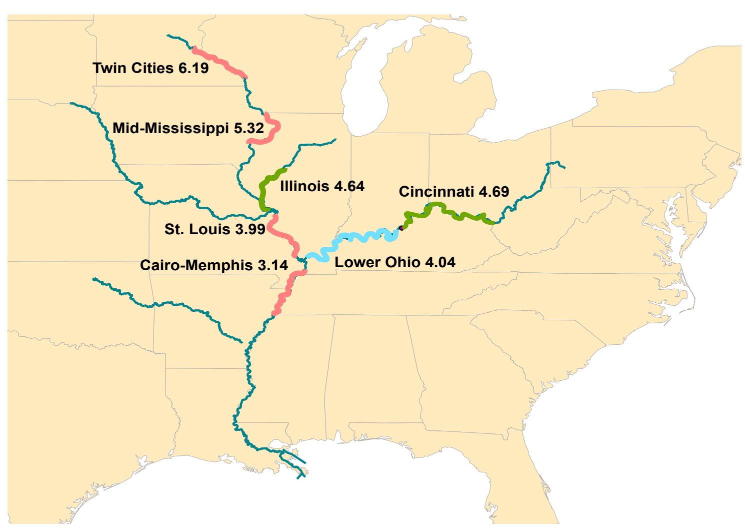
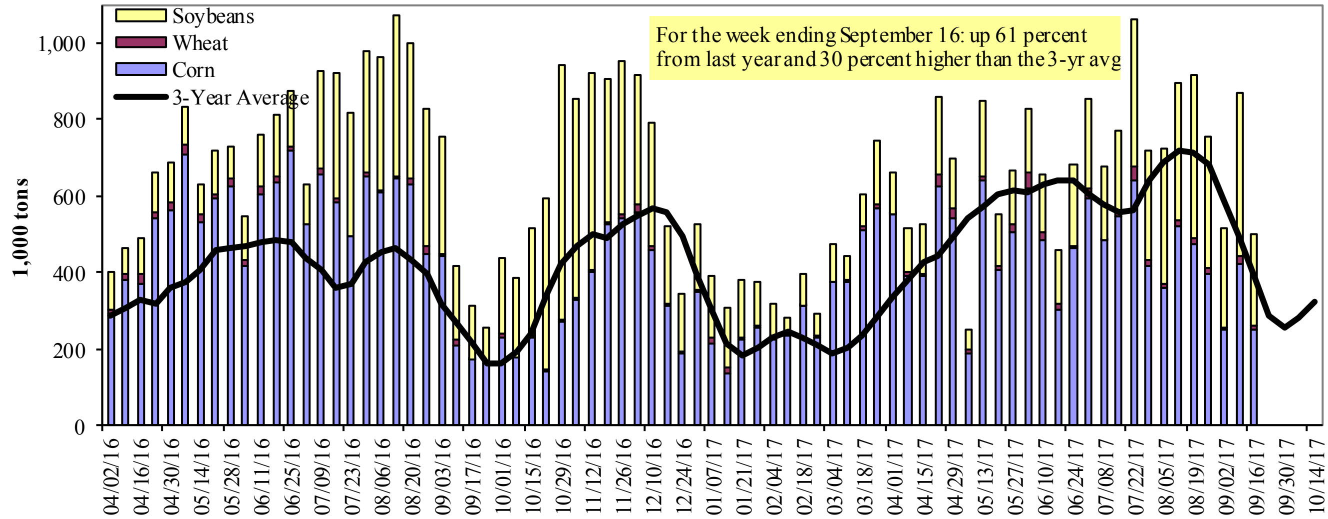


Figure 10

Barge Movements on the Mississippi 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 9/16/2017	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	75	2	46	0	123
Winfield, MO (L25)	157	6	149	0	312
Alton, IL (L26)	251	8	248	2	509
Granite City, IL (L27)	252	8	243	2	504
Illinois River (L8)	71	0	79	0	150
Ohio River (L52)	7	5	21	2	34
Arkansas River (L1)	0	0	20	0	20
Weekly total - 2017	259	13	283	3	558
Weekly total - 2016	261	72	185	6	524
2017 YTD[1]	17,473	1,826	10,044	224	29,567
2016 YTD	18,263	1,671	8,903	257	29,093
2017 as % of 2016 YTD	96	109	113	87	102
Last 4 weeks as % of 2016[2]	96	104	127	29	107
Total 2016	24,136	2,030	16,668	344	43,178

[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.

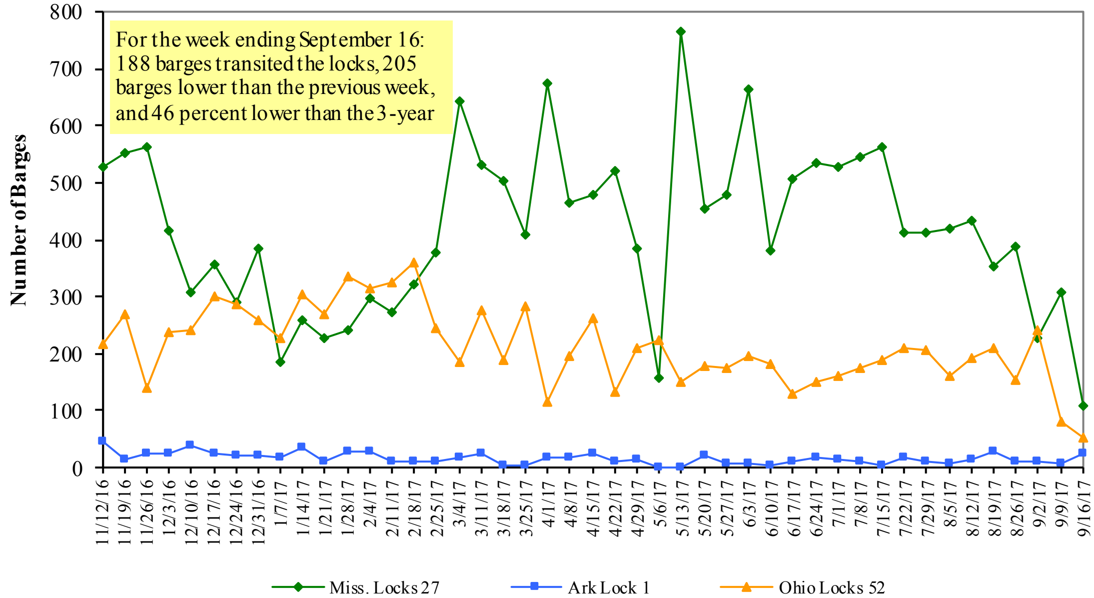
[2] As a percent of same period in 2016.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers

Figure 11

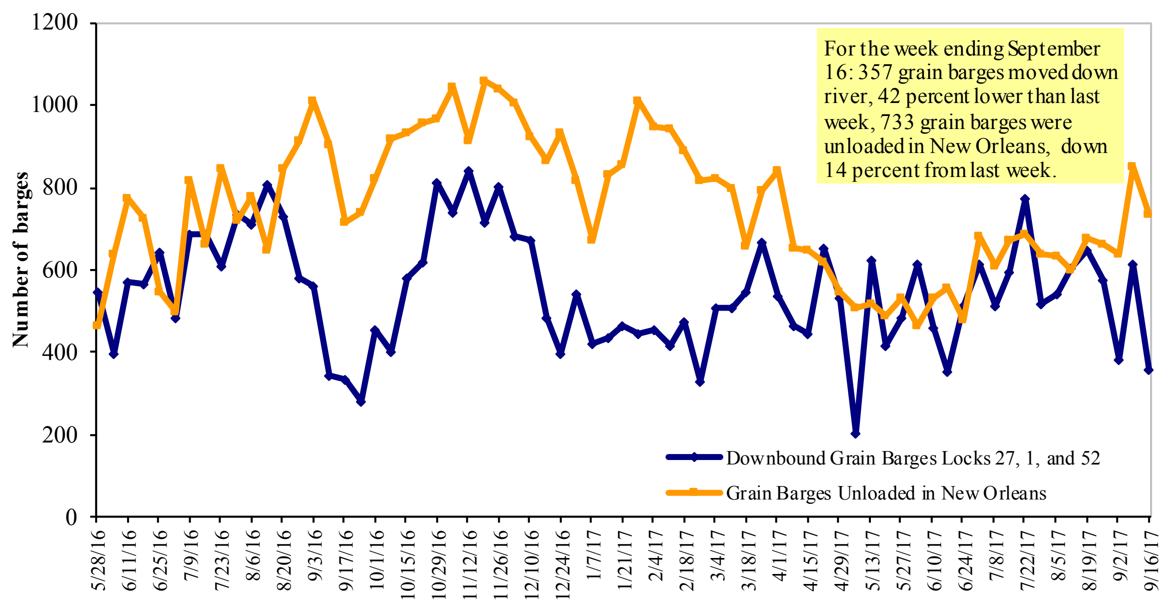
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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[1], Week Ending 9/18/2017(US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.814	-0.015	0.423
	New England	2.765	0.004	0.360
	Central Atlantic	2.919	-0.003	0.434
	Lower Atlantic	2.749	-0.027	0.433
II	Midwest[2]	2.743	-0.010	0.377
III	Gulf Coast[3]	2.615	-0.032	0.373
IV	Rocky Mountain	2.813	-0.014	0.331
V	West Coast	3.103	0.001	0.451
	West Coast less California	3.009	0.002	0.485
	California	3.179	0.000	0.425
Total	U.S.	2.786	-0.016	0.397

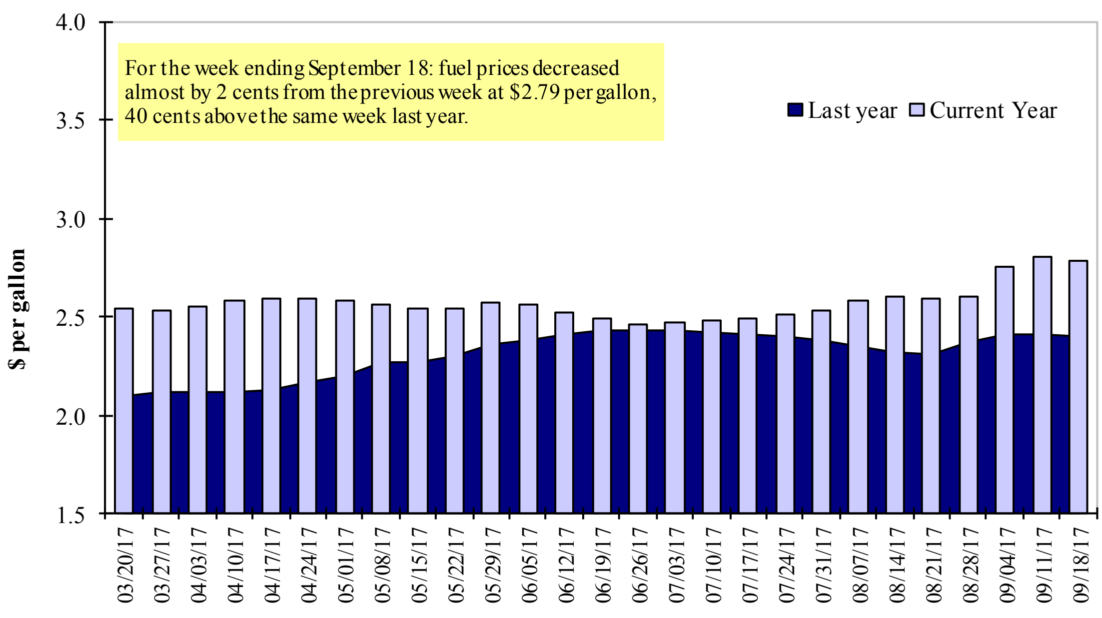
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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)

For the week ending	Wheat HRW	Wheat SRW	Wheat HRS	Wheat SWW	Wheat DUR	All wheat	Corn	Soybeans	Total
Export Balances[1]									
9/7/2017	1,685	548	1,351	1,283	99	4,966	9,788	15,842	30,597
This week year ago	2,193	505	1,633	933	78	5,341	15,619	22,317	43,277
Cumulative exports-marketing year[2]									
2017/18 YTD	3,148	711	2,058	1,763	129	7,810	715	1,152	9,676
2016/17 YTD	3,189	652	2,395	1,206	125	7,567	1,428	1,228	10,223
YTD 2017/18 as % of 2016/17	99	109	86	146	103	103	50	94	95
Last 4 wks as % of same period 2016/17	75	111	87	140	130	94	39	43	48
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 Importers[1] of U.S. Corn

For the week ending 9/07/2017	2017/18 Current MY	2016/17 Last MY	% change current MY from last MY	Exports[3] 3-year avg 2014-2016
				- 1,000 mt -
Mexico	4,888	4,226	16	12,297
Japan	1,187	2,410	(51)	11,450
Korea	75	851	(91)	4,494
Colombia	639	758	(16)	4,179
Peru	496	380	30	2,693
Top 5 Importers	**7,285**	**8,624**	**(16)**	**35,113**
Total US corn export sales	**10,503**	**17,968**	**(42)**	**49,308**
% of Projected	22%	31%		
Change from prior week[2]	**1,047**	**922**		
Top 5 importers' share of U.S. corn export sales	69%	48%		71%
USDA forecast, September 2017	**47,074**	**58,397**	**(19)**	
Corn Use for Ethanol USDA forecast, September 2017	**139,065**	**138,049**	**1**	

[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 Importers[1] of U.S. Soybeans

For the week ending 9/07/2017	Commitments[2] 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	7,252	9,896	(27)	31,881
Mexico	839	1,135	(26)	3,452
Indonesia	382	246	56	1,987
Japan	564	544	4	2,067
Netherlands	0	0	0	2,098
Top 5 importers	**9,037**	**11,821**	**(24)**	**41,486**
Total US soybean export sales	**16,994**	**23,545**	**(28)**	**52,919**
% of Projected	28%	40%		
Change from prior week[2]	**1,612**	**1,777**		
Top 5 importers' share of U.S. soybean export sales	53%	50%		**78%**
USDA forecast, September 2017	**60,627**	**59,128**	**103**	

(n) indicates negative number.

[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/. 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 9/07/2017	Total Commitments[2] 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 -
Japan	1,192	1,113	7	2,620
Mexico	1,587	1,161	37	2,743
Philippines	1,481	1,345	10	2,395
Brazil	95	813	(88)	862
Nigeria	721	596	21	1,254
Korea	1,023	673	52	1,104
China	532	437	22	1,623
Taiwan	565	432	31	768
Indonesia	611	378	62	726
Colombia	367	400	(8)	635
Top 10 importers	**8,173**	**7,348**	11	**14,729**
Total US wheat export sales	**12,776**	**12,909**	**(1)**	**22,804**
% of Projected	48%	45%		
Change from prior week[2]	**317**	**402**		
Top 10 importers' share of U.S. wheat export sales	64%	57%		65%
USDA forecast, September 2017	**26,567**	**28,747**	**(8)**	

(n) indicates negative number.

[1] Based on FAS Marketing Year Ranking Reports for 2015/16 - 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 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 09/14/17	Previous Week[1]	Current Week as % of Previous	2017 YTD	2016 YTD	2017 YTD as % of 2016 YTD	Last 4-weeks as % of: Last Year	Last 4-weeks as % of: Prior 3-yr. avg.	2016 Total
Pacific Northwest									
Wheat	247	290	85	11,416	9,157	125	94	95	12,325
Corn	0	53	0	9,988	9,517	105	15	24	12,009
Soybeans	72	138	52	5,621	5,263	107	n/a	n/a	14,447
Total	**319**	**481**	**66**	**27,024**	**23,938**	**113**	**62**	**85**	**38,782**
Mississippi Gulf									
Wheat	61	127	48	3,422	2,721	126	82	58	3,480
Corn	394	425	93	23,310	22,992	101	67	80	31,420
Soybeans	812	926	88	17,104	17,239	99	77	158	35,278
Total	**1,266**	**1,477**	**86**	**43,835**	**42,952**	**102**	**73**	**108**	**70,178**
Texas Gulf									
Wheat	111	53	209	4,950	3,766	131	52	72	6,019
Corn	32	0	n/a	580	1,181	49	21	43	1,669
Soybeans	0	0	n/a	0	92	0	n/a	n/a	1,105
Total	**143**	**53**	**270**	**5,530**	**5,039**	**110**	**43**	**66**	**8,792**
Interior									
Wheat	38	50	75	1,396	1,031	135	85	83	1,543
Corn	200	176	114	5,965	5,124	116	117	120	7,197
Soybeans	77	75	103	3,474	2,812	124	160	240	4,577
Total	**315**	**301**	**105**	**10,835**	**8,967**	**121**	**120**	**130**	**13,317**
Great Lakes									
Wheat	33	14	234	494	677	73	52	55	1,186
Corn	33	0	n/a	173	449	39	28	35	584
Soybeans	13	22	61	321	159	201	n/a	n/a	910
Total	**79**	**36**	**218**	**988**	**1,285**	**77**	**71**	**81**	**2,681**
Atlantic									
Wheat	0	2	0	44	200	22	121	5	315
Corn	0	4	0	10	85	11	12	7	294
Soybeans	2	2	114	997	1,082	92	22	58	2,269
Total	**2**	**8**	**28**	**1,050**	**1,366**	**77**	**21**	**18**	**2,878**
U.S. total from ports[2]									
Wheat	489	536	91	21,721	17,552	124	77	79	24,867
Corn	659	658	100	40,026	39,347	102	54	70	53,173
Soybeans	977	1,163	84	27,516	26,648	103	90	186	58,587
Total	**2,125**	**2,357**	**90**	**89,262**	**83,547**	**107**	**71**	**98**	**136,627**

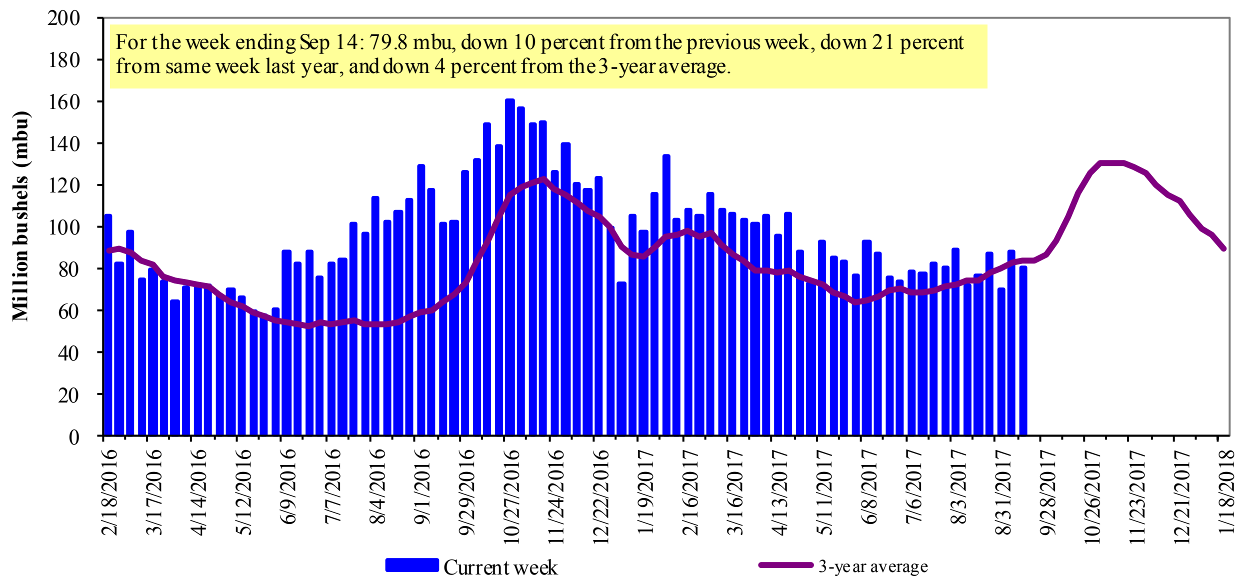
[1] Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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 58 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2016.

Figure 14

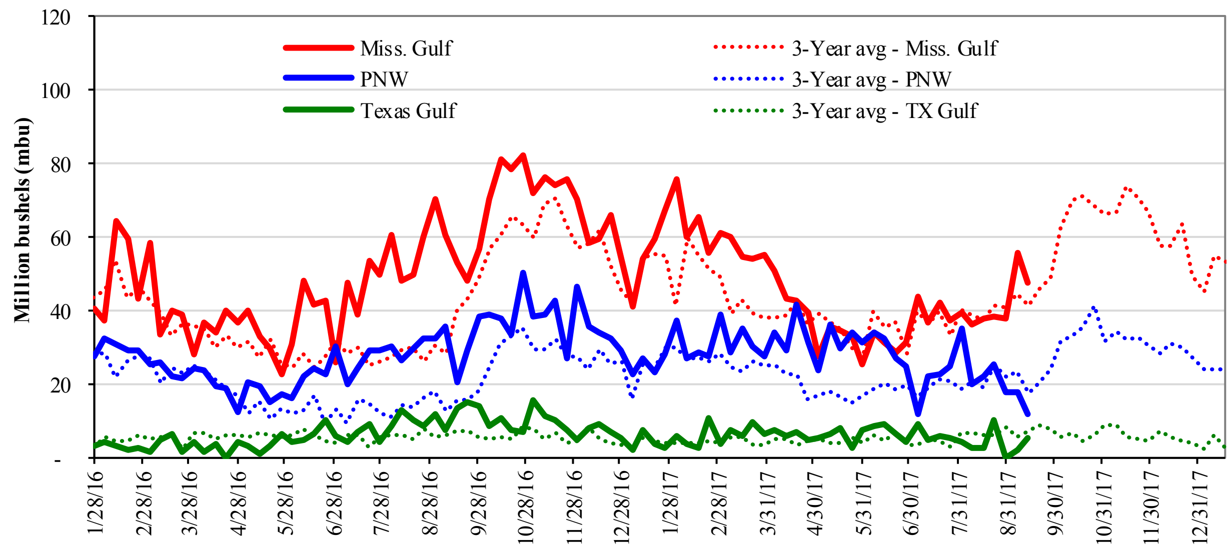
U.S. grain inspected for export (wheat, corn, and soybeans)



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 09/14/17 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Mississippi Gulf:	47.6	Last Week:	down 14	up 175	down 8	down 34
PNW:	11.7	Last Year (same week):	down 10	down 59	down 20	down 43
Texas Gulf:	5.3	3-yr avg. (4-wk. mov. Avg):	up 13	down 20	up 9	down 46

Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)
[1] The 3-year average is based on a 4-week running average

Ocean Transportation

Table 17

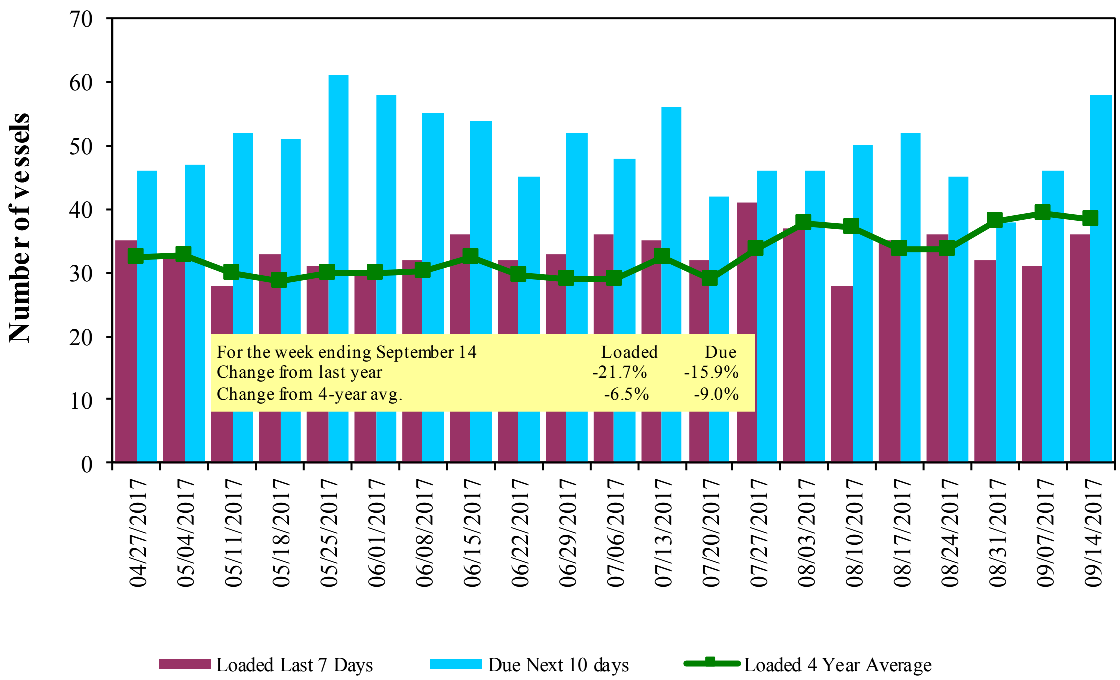
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
9/14/2017	40	36	58	5	n/a
9/7/2017	39	31	46	5	n/a
2016 range	(21..62)	(27..55)	(40..87)	(6..27)	n/a
2016 avg.	43	40	62	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

U.S. Gulf Vessel Loading Activity

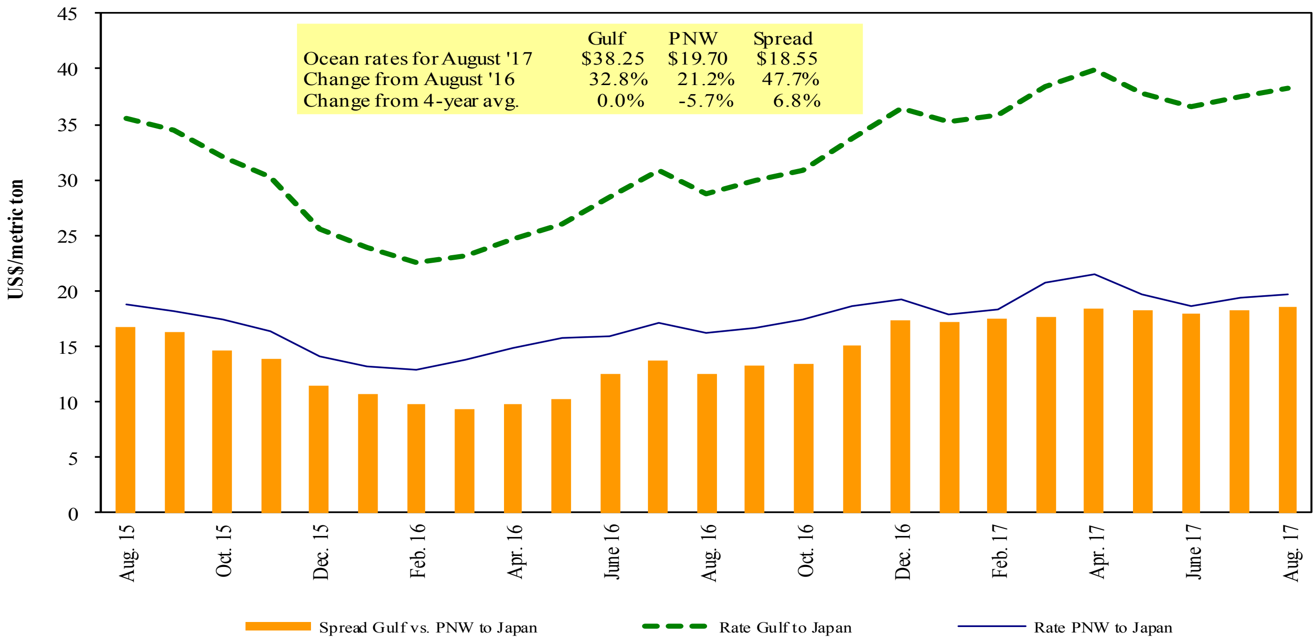


Source: Transportation & Marketing Programs/AMS/USDA

[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 09/16/2017

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US $/metric ton)
U.S. Gulf	China	Heavy Grain	Oct 15/30	66,000	42.50
U.S. Gulf	China	Heavy Grain	Oct 1/10	66,000	41.25
U.S. Gulf	China	Heavy Grain	Oct 1/10	66,000	41.50
U.S. Gulf	China	Heavy Grain	Oct 1/10	66,000	38.75
U.S. Gulf	China	Heavy Grain	Sep 5/15	66,000	37.00
U.S. Gulf	China	Heavy Grain	Sep 5/15	66,000	39.00
U.S. Gulf	China	Heavy Grain	Sep 1/10	60,000	38.50
U.S. Gulf	China	Heavy Grain	Aug 25/30	66,000	37.75
U.S. Gulf	China	Heavy Grain	Aug 22/28	60,000	35.10
U.S. Gulf	China	Heavy Grain	Aug 10/20	60,000	34.50
U.S. Gulf	China	Heavy Grain	Aug 1/5	60,000	33.75
U.S. Gulf	China	Heavy Grain	Jul 20/30	60,000	32.95
U.S. Gulf	Djibouti	Wheat	Sep 15/25	30,000	54.50*
PNW	China	Heavy Grain	Oct 1/10	60,000	25.00
PNW	Bangladesh	Wheat	Sep 29/Oct 9	13,620	58.00*
Brazil	China	Heavy Grain	Sep 28/Oct 10	60,000	30.25
Brazil	China	Heavy Grain	Aug 1/10	60,000	27.25
Brazil	China	Heavy Grain	Jul 15/30	60,000	22.75
Brazil	Malaysia	Heavy Grain	Aug 15/24	65,000	23.75

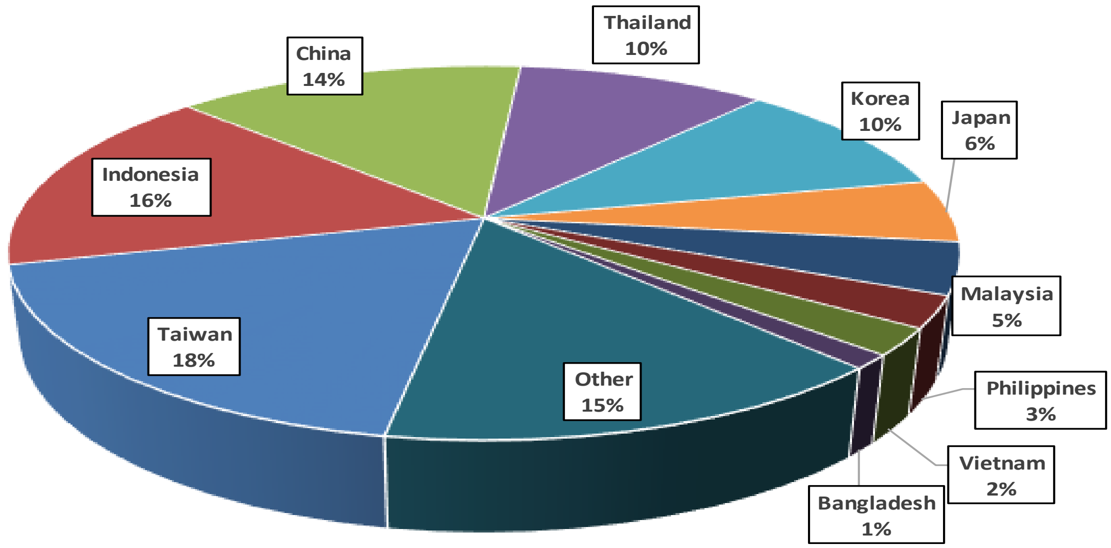
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option

*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 2015, containers were used to transport 8 percent of total U.S. waterborne grain exports. Approximately 64 percent of U.S. waterborne grain exports in 2015 went to Asia, of which 12 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

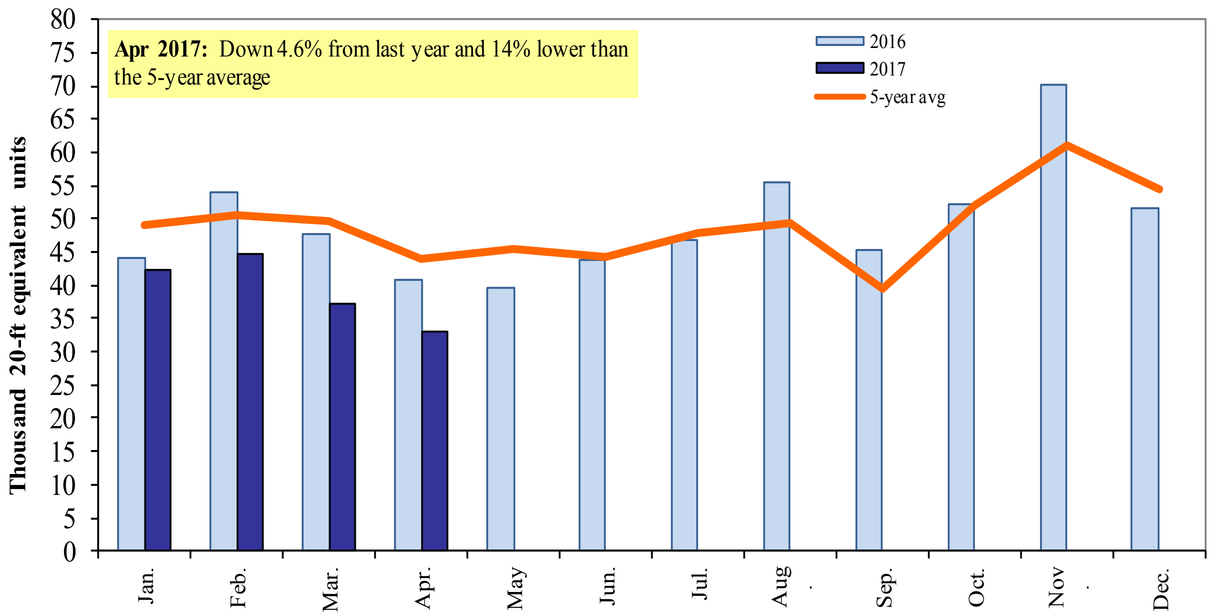
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-April 2017



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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