United States Department of Agriculture

Grain Transportation Report

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

Contact Us

November 22, 2018

Contents

The next release is November 29, 2018

WEEKLY HIGHLIGHTS

Wheat Inspections Highest Since April

For the week ending November 15, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.43 million metric tons (mmt), down 16 percent from the previous week, down 25 percent from last year, and down 30 percent below the 3-year average. At .536 mmt tons, inspections of wheat were the highest since mid-April—up 47 percent from the past week. Wheat shipments increased to Asia and Latin America. The increase in wheat, however, could not offset the 31 and 20 percent drop in corn and soybean inspections. Grain inspections decreased 15 percent in the Mississippi Gulf and 19 percent in the Pacific Northwest (PNW). Outstanding export sales (unshipped) of grain are up for wheat and corn but down for soybeans.

Corps Announces Winter Closures of Upper Mississippi River Locks

The U.S. Army Corps of Engineers (Corps), St. Paul District, announced the closing dates for portions of the Upper Mississippi River. On December 2, the Corps will begin repairs at Lock and Dam (L&D) 6, near Hasting, MN. On December 10, L&D 4, near Alma, WI; L&D 5, near Minnesota City, MN; L&D 5A, near Fountain City, WI; and L&D 9, near Lynxville, Wisconsin, are scheduled for closure due to repairs. Corps officials are advising all navigation vessels near St. Paul, MN, should depart no later than November 30 in order to make passage through the closed facilities. Repair work during winter is done as portions of the Upper Mississippi River are impassable due to ice accumulations.

FRA Issues Funding Notice

On November 15, the Federal Railroad Administration (FRA) issued a Notice of Funding Opportunity (NOFO) of plans to make more than $272 million in grant funds available under the "Federal-State Partnership for State of Good Repair Program." According to FRA's press release, the funds will be used to repair, replace, or rehabilitate publicly-owned railroad assets and to improve intercity passenger rail performance. Eligible projects include those that replace existing assets in-kind, replace existing assets with those that increase capacity or provide a higher level of service, and those that ensure existing assets maintain service while being brought into a state of good repair. Applications for funding under this solicitation must be submitted via www.Grants.gov and are due by 5:00 pm EST on March 18, 2019.

Snapshots by Sector

Export Sales

For the week ending November 8, **unshipped balances** of wheat, corn, and soybeans totaled 29.4 mmt, down 17 percent from the same time last year. Net weekly **wheat export sales** were .438 mmt, up 32 percent from the previous week. Net **corn export sales** were .893 mmt, up 27 percent from the previous week. Net **soybean export sales** were .471 mmt, up 47 percent from the past week.

Rail

U.S. Class I railroads originated 21,388 **grain carloads** for the week ending November 10; up 5 percent from the previous week, down 6 percent from last year, and down 12 percent from the 3-year average.

Average December shuttle **secondary railcar** bids/offers per car were $213 below tariff for the week ending November 15, down $75 from last week, and $122 lower than last year. Average non-shuttle secondary railcar bids/offers were $13 above tariff, down $50 from last week. There were no non-shuttle bids/offers this week last year.

Barge

For the week ending November 17, **barge grain movements** totaled 732,084 tons, 25 percent lower than the previous week and down 17 percent from the same period last year.

For the week ending November 17, 475 grain barges **moved down river**, 147 less than the previous week. There were 795 grain barges **unloaded in New Orleans**, 4 percent higher than the previous week.

Ocean

For the week ending November 15, 36 **ocean-going grain vessels** were loaded in the Gulf, 12 percent less than the same period last year. Fifty-nine vessels are expected to be loaded within the next 10 days, 7 percent more than the same period last year.

For the week ending November 15, the ocean freight rate for shipping bulk grain, from the Gulf to Japan, was $48.00 per metric ton, 1 percent less than the previous week. The cost of shipping, from the PNW to Japan, was $26.75 per metric ton, 1 percent less than the previous week.

Fuel

For the week ending November 19, the **U.S. average diesel fuel price** decreased 3.5 cents from the previous week to $3.282 per gallon, 37.0 cents above the same week last year.

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Web: **http://dx.doi.org/10.9752/TS056.11-22-2018**

Feature Article/Calendar

Nov. 27-29	Montana Grain Growers Association Annual Convention	Great Falls, MT	https://www.mgga.org/events/convention/
Dec. 2-4	NGFA Country Elevator Conference and Trade Show	St. Louis, MO	https://www.ngfa.org/country-elevator-conference/
Dec. 6	AgTC Workshop	Minneapolis, MN	https://agtrans.org/events/workshops/
Jan. 13-17, 2019	TRB Annual Meeting 2019	Washington, DC	https://tradeshowz.com/trb
Jan. 14-16	Michigan Agri-Business Association	Lansing, MI	https://miagbiz.org/
Jan. 16-17	South Dakota Ag Expo	Sioux Falls, SD	https://www.agexpo-sd.org/
Jan. 20-22	North Dakota Grain Dealers Association Convention	Fargo, ND	https://www.ndgda.org/
Jan. 24-25	TEGMA 2019 Annual Meeting	Scottsdale, AZ	http://www.tegma.org/meetings
Jan. 30	AgTC Workshop	Portland, OR	https://agtrans.org/events/workshops/
Jan. 31 - Feb. 1	Ohio AgriBusiness Association Industry Conference	Dublin, OH	http://oaba.net/aws/OABA/pt/sp/events_conference
Feb. 1	AgTC Workshop	Boise, ID	https://agtrans.org/events/workshops/
Feb. 11-16	Wheat Industry Winter Conference	Washington, DC	https://www.wheatworld.org/newsroom/events/
Feb. 12-14	2019 Waterways Council Washington Meeting	Washington, DC	http://waterwayscouncil.org/calendar/
Feb. 17-19	Grain & Feed Association of Illinois Meeting	Schaumberg, IL	http://gfai.org/events/list/
Feb. 19	AgTC Workshop	Sacramento, CA	https://agtrans.org/events/workshops/
Feb. 20	AgTC Workshop	Fresno, CA	https://agtrans.org/events/workshops/
Feb. 21-22	USDA Agricultural Outlook Forum	Washington, DC	https://www.usda.gov/oce/forum/
Feb. 28 - Mar. 2	Wheat 2019 Commodity Classic	Orlanda, FL	https://www.wheatworld.org/newsroom/events/
Mar. 4-6	Minnesota Grain & Feed Association Annual Convention	Bloommington, MN	651-454-8212
Mar. 17-19	NGFA 123rd Annual Convention	Amelia Island, FL	https://www.ngfa.org/upcoming-events/
April 3-5	Texas Grain & Feed Association	Austin, TX	http://www.tgfa.com
April 3-5	GEAPS 23rd Annual Great Lakes Conference	Sandusky, OH	http://geapsglc.com/
April 15-19	Intl. Assn. of Operative Millers (IAOM) Conference and Expo	Denver, CO	https://www.iaom.info/annualmeeting/
April 24-27	California Grain & Feed Association	Indian Wells, CA	http://www.cgfa.org/
May 13-16	American Feed Industry Association (AFIA) Purchasing and Ingredient Suppliers Conference	Orlando, FL	http://www.afia.org/
June 19-21	Pacific Northwest Grain & Feed Assn.	Whitefish, MT	http://www.pnwgfa.org/
June 25-27	International Oil Mill Supt. Association	St. Louis, MO	https://iomsa.org/
July 11-13	Florida Feed Association Annual Meeting	Longboat Key, FL	https://floridafeed.com
July 24-26	NGFA/GJ CONVEY ’19 Conference	Kansas City, MO	https://www.ngfa.org/upcoming-events/convey/

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit Train	Shuttle		Gulf	Pacific
11/21/18	220	282	212	178	215	190
11/14/18	223	282	210	186	217	191

[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 Program/AMS/USDA

Table 2

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

Commodity	Origin--Destination	11/16/2018	11/9/2018
Corn	IL--Gulf	-0.70	-0.73
Corn	NE--Gulf	-0.75	-0.82
Soybean	IA--Gulf	-1.15	-1.08
HRW	KS--Gulf	-1.60	-1.35
HRS	ND--Portland	-1.81	-1.66

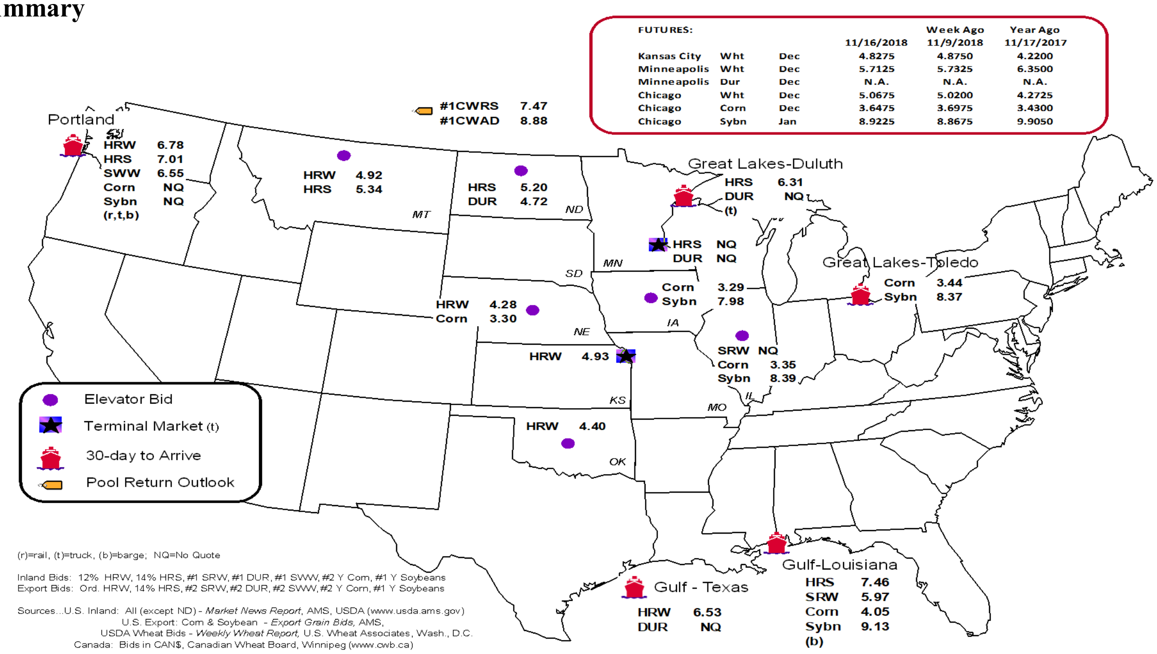
Note: nq = no quote; n/a = not available

Source: Transportation & Marketing Program/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]
11/14/2018[p]	204	751	4,628	566	6,149	11/11/2018	3,677
11/07/2018[r]	644	574	5,097	580	6,895	11/4/2018	3,402
2018 YTD[r]	21,176	42,786	280,768	19,085	363,815	2018 YTD	112,990
2017 YTD[r]	26,878	70,088	251,442	19,841	368,249	2017 YTD	107,064
2018 YTD as % of 2017 YTD	79	61	112	96	99	% change YTD	106
Last 4 weeks as % of 2017[2]	63	47	81	62	74	Last 4wks % 2017	147
Last 4 weeks as % of 4-year avg.[2]	40	35	73	53	62	Last 4wks % 4 yr	154
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.

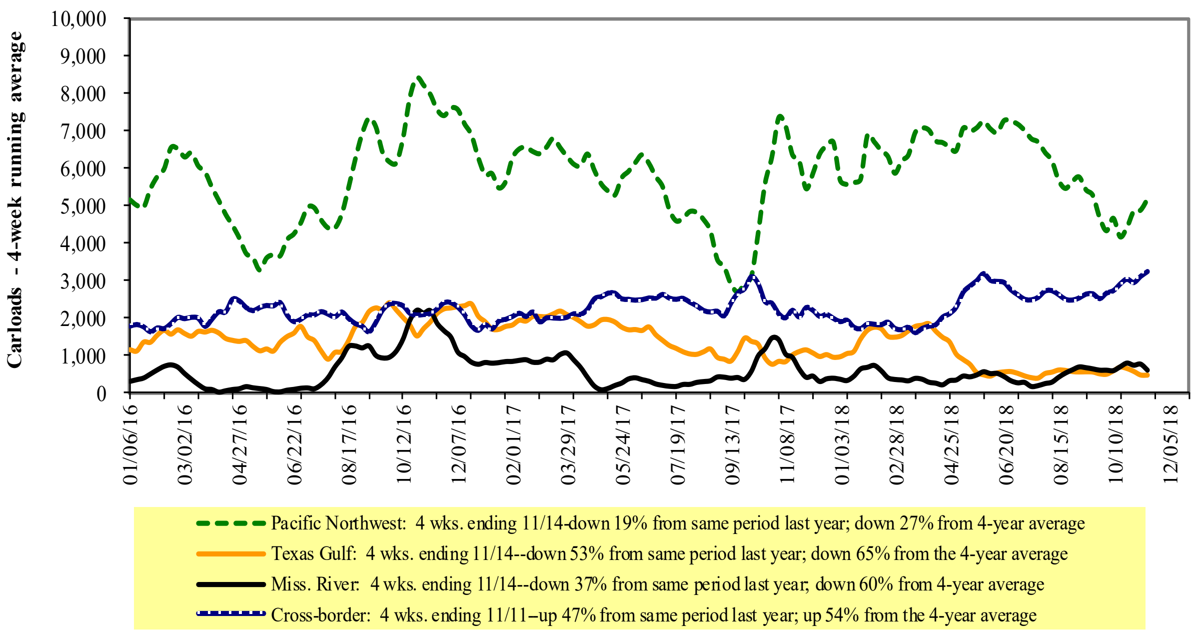
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Program/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 Program/AMS/USDA

Table 4

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

For the week ending: 11/10/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,003	2,313	11,200	780	5,092	21,388	4,576	4,463
This week last year	1,701	3,313	11,778	828	5,240	22,860	4,747	5,513
2018 YTD	87,404	114,345	552,063	41,968	234,006	1,029,786	181,431	211,384
2017 YTD	76,572	124,685	498,919	43,876	255,146	999,198	172,542	211,245
2018 YTD as % of 2017 YTD	114	92	111	96	92	103	105	100
Last 4 weeks as % of 2017*	102	75	102	77	89	94	100	93
Last 4 weeks as % of 3-yr avg.**	91	68	97	90	81	88	95	98
Total 2017	89,465	142,824	578,964	50,223	289,574	1,151,050	198,456	244,766

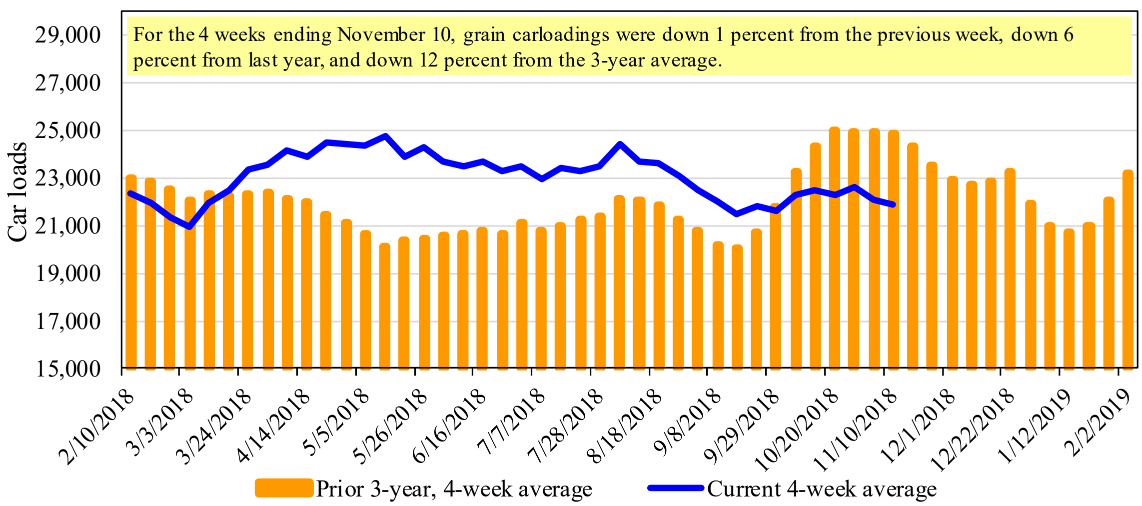
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 11/15/2018		Delivery period: Dec-18	Dec-17	Jan-19	Jan-18	Feb-19	Feb-18	Mar-19	Mar-18
BNSF[3]	COT grain units	0	no bids	no bid	no bids	no bid	no bids	no bid	no bids
	COT grain single-car[5]	65	0	17	0	0	0	no bid	0
UP[4]	GCAS/Region 1	no offer	no bids	no offer	no bids	no offer	no offer	n/a	n/a
	GCAS/Region 2	no bid	10	no offer	10	no offer	no offer	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.

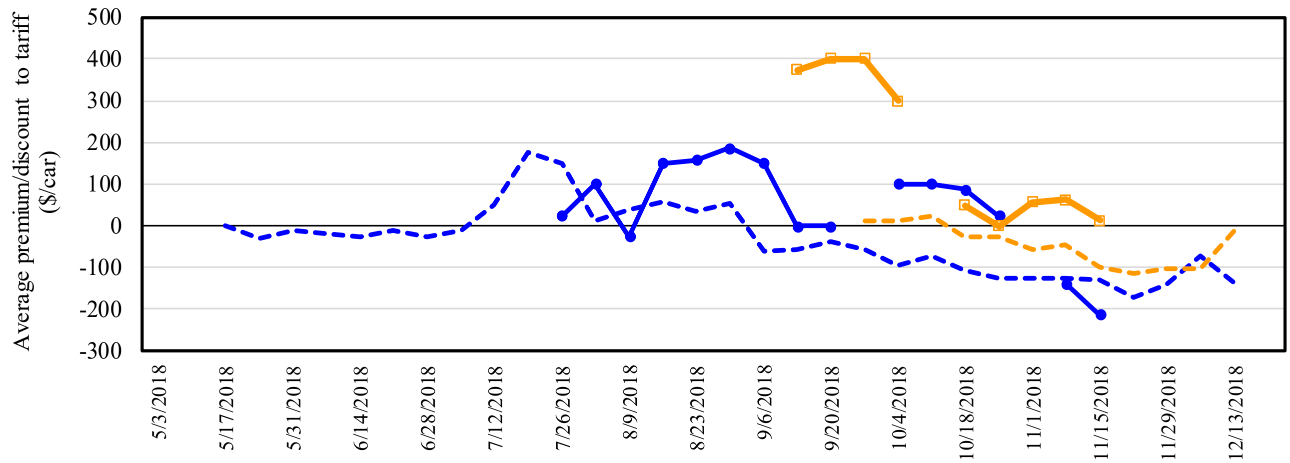
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Program/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 December 2018, Secondary Market



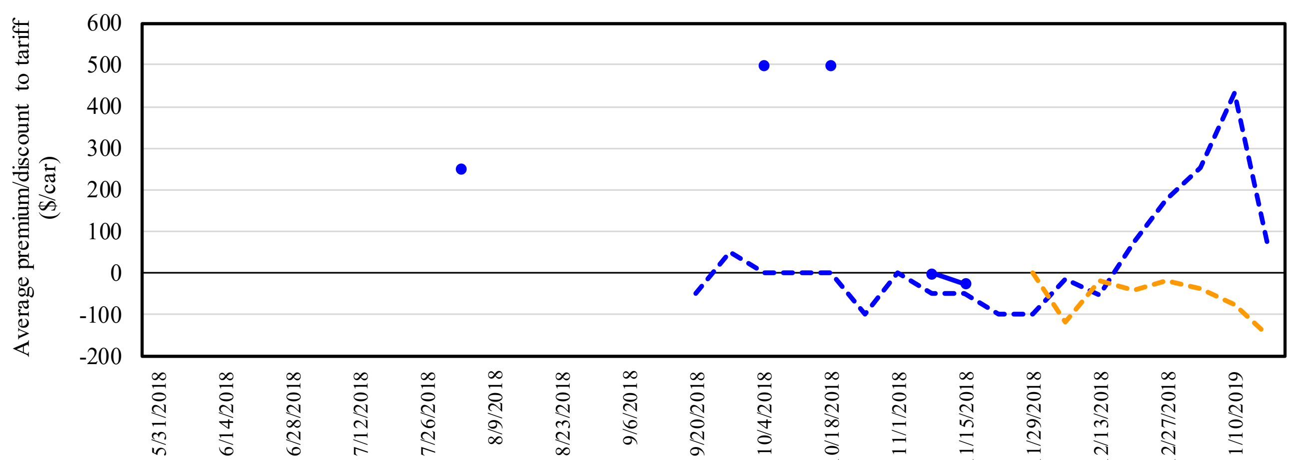
11/15/2018	BNSF	UP
Non-Shuttle	$13	$13
Shuttle	-$225	-$200

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

Average Non-shuttle bids/offers fell $50 this week, and are $388 below the peak.
Average Shuttle bids/offers fell $75 this week and are $400 below the peak.

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

Figure 5
Bids/Offers for Railcars to be Delivered in January 2019, Secondary Market



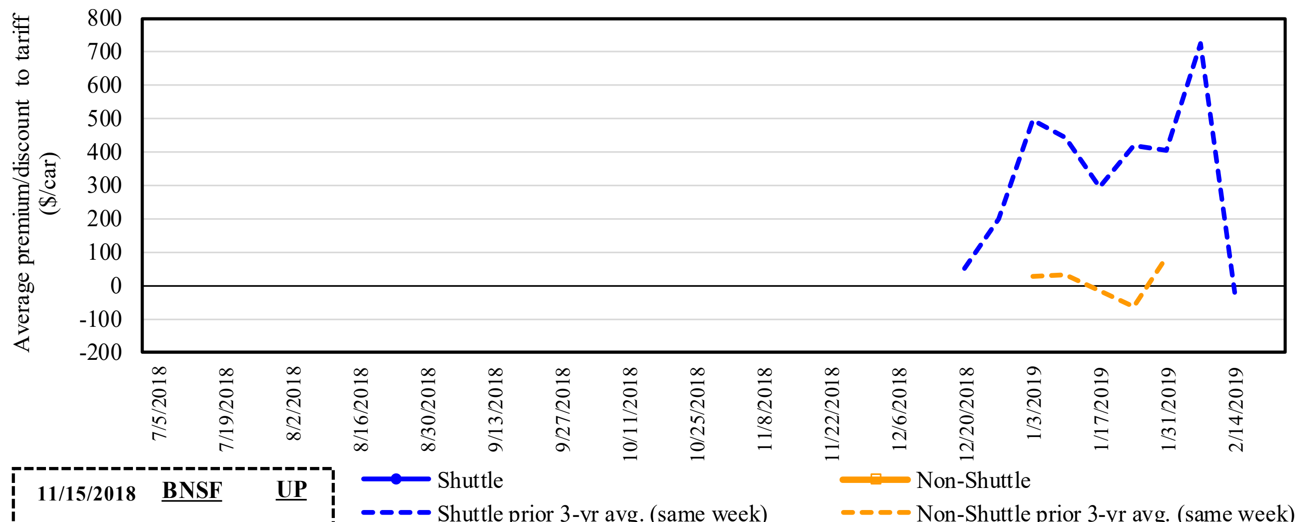
11/15/2018	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	-$25

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

There were no Non-Shuttle bids/offers this week.
Average Shuttle bids/offers fell $25 this week and are $525 below the peak.

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

Figure 6
Bids/Offers for Railcars to be Delivered in February 2019, Secondary Market



11/15/2018	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	n/a

There were no Non-Shuttle bids/offers this week.
There were no Shuttle bids/offers this week.

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

Table 6

Weekly Secondary Railcar Market ($/car)[1]

	For the week ending: 11/15/2018	Delivery period Dec-18	Jan-19	Feb-19	Mar-19	Apr-19	May-19
Non-shuttle	**BNSF-GF**	**13**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(12)	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	**13**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(87)	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**	**(225)**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(50)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2017	(294)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**(200)**	**(25)**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(100)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2017	50	n/a	n/a	n/a	n/a	n/a

[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 Program/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]

November, 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	2
	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	2
	Amarillo, TX	Los Angeles, CA	$5,121	$326	$54.09	$1.47	5
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$241	$42.12	$1.07	4
	Toledo, OH	Raleigh, NC	$6,581	$0	$65.35	$1.66	4
	Des Moines, IA	Davenport, IA	$2,258	$51	$22.93	$0.58	1
	Indianapolis, IN	Atlanta, GA	$5,646	$0	$56.07	$1.42	4
	Indianapolis, IN	Knoxville, TN	$4,704	$0	$46.71	$1.19	4
	Des Moines, IA	Little Rock, AR	$3,609	$150	$37.33	$0.95	2
	Des Moines, IA	Los Angeles, CA	$5,327	$438	$57.24	$1.45	3
Soybeans	Minneapolis, MN	New Orleans, LA	$4,131	$246	$43.46	$1.18	16
	Toledo, OH	Huntsville, AL	$5,459	$0	$54.21	$1.48	3
	Indianapolis, IN	Raleigh, NC	$6,698	$0	$66.51	$1.81	4
	Indianapolis, IN	Huntsville, AL	$4,937	$0	$49.03	$1.33	4
	Champaign-Urbana, IL	New Orleans, LA	$4,745	$241	$49.52	$1.35	2
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	$5,896	$0	$58.55	$1.59	4
	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	4
Corn	Minneapolis, MN	Portland, OR	$5,180	$0	$51.44	$1.31	4
	Sioux Falls, SD	Tacoma, WA	$5,140	$0	$51.04	$1.30	4
	Champaign-Urbana, IL	New Orleans, LA	$3,800	$241	$40.13	$1.02	4
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	5
	Des Moines, IA	Amarillo, TX	$4,060	$189	$42.19	$1.07	4
	Minneapolis, MN	Tacoma, WA	$5,180	$0	$51.44	$1.31	4
	Council Bluffs, IA	Stockton, CA	$5,000	$0	$49.65	$1.26	4
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,750	$0	$57.10	$1.55	3
	Minneapolis, MN	Portland, OR	$5,800	$0	$57.60	$1.57	3
	Fargo, ND	Tacoma, WA	$5,650	$0	$56.11	$1.53	3
	Council Bluffs, IA	New Orleans, LA	$4,775	$278	$50.18	$1.37	2
	Toledo, OH	Huntsville, AL	$4,634	$0	$46.02	$1.25	6
	Grand Island, NE	Portland, OR	$5,710	$393	$60.60	$1.65	3

[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: November, 2018							
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	$423	$79.64	$2.17	3
	TX	Salinas Victoria, NL	$4,329	$102	$45.27	$1.23	2
Corn	IA	Guadalajara, JA	$8,528	$387	$91.09	$2.31	4
	SD	Celaya, GJ	$7,880	$0	$80.51	$2.04	2
	NE	Queretaro, QA	$8,207	$351	$87.43	$2.22	4
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	2
	MO	Tlalnepantla, EM	$7,573	$342	$80.87	$2.05	4
	SD	Torreon, CU	$7,480	$0	$76.43	$1.94	2
Soybeans	MO	Bojay (Tula), HG	$8,284	$359	$88.31	$2.40	3
	NE	Guadalajara, JA	$8,842	$390	$94.33	$2.56	3
	IA	El Castillo, JA	$9,110	$0	$93.08	$2.53	2
	KS	Torreon, CU	$7,714	$288	$81.76	$2.22	4
Sorghum	NE	Celaya, GJ	$7,527	$358	$80.56	$2.04	4
	KS	Queretaro, QA	$8,000	$209	$83.87	$2.13	3
	NE	Salinas Victoria, NL	$6,633	$168	$69.48	$1.76	4
	NE	Torreon, CU	$6,962	$276	$73.95	$1.88	4

[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

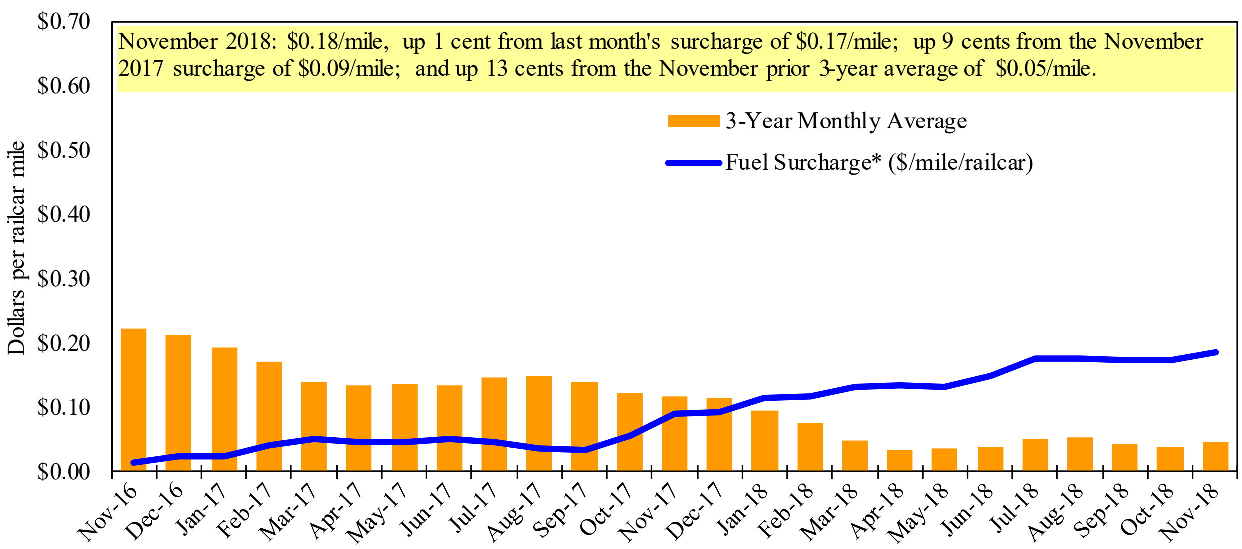
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[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]

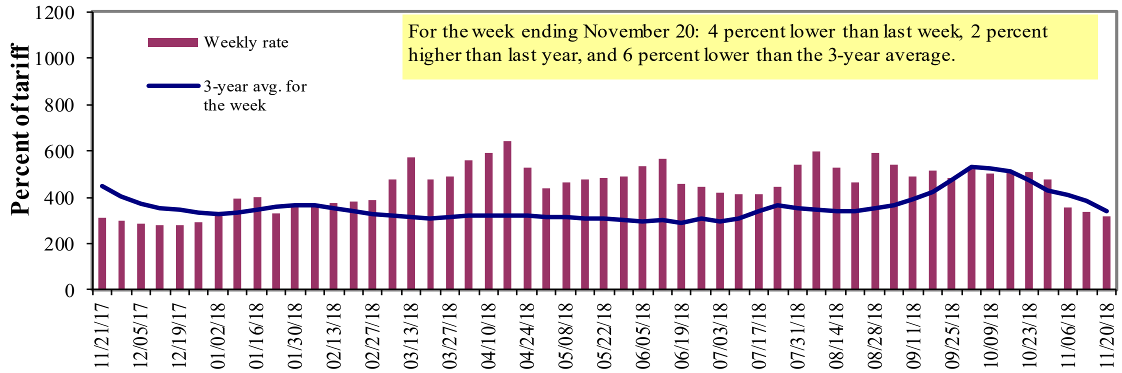


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.
Sources: 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 Program/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]	11/20/2018	363	318	320	283	280	280	230
	11/13/2018	400	353	335	265	287	290	238
$/ton	11/20/2018	22.47	16.92	14.85	11.29	13.13	11.31	7.22
	11/13/2018	24.76	18.78	15.54	10.57	13.46	11.72	7.47
Current week % change from the same week:								
	Last year	-8	-2	2	31	-16	-16	12
	3-year avg. [2]	-14	-10	-6	13	-15	-15	6
Rate[1]	December	-	-	335	248	280	280	230
	February	-	-	363	250	283	283	228

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds; "-" n/a due to closure

Source: Transportation & Marketing Program/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.

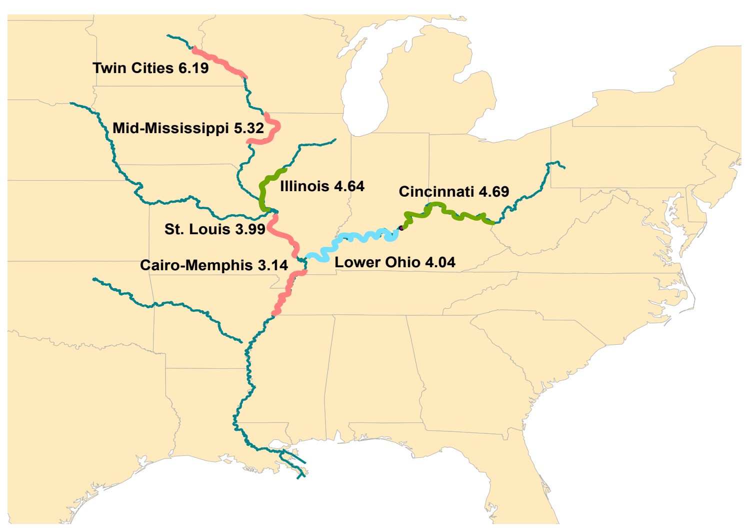
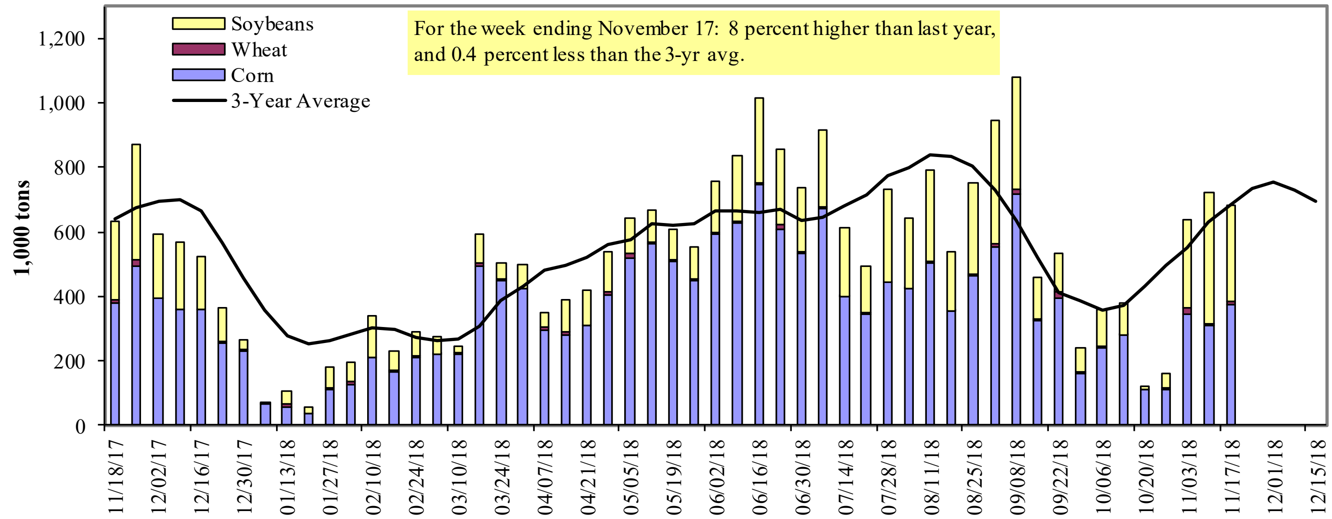


Figure 10

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 11/17/2018	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	212	0	112	0	324
Winfield, MO (L25)	292	8	255	0	555
Alton, IL (L26)	346	8	289	0	643
Granite City, IL (L27)	374	8	300	0	682
Illinois River (L8)	81	0	30	0	111
Ohio River (L52)	4	0	17	0	20
Arkansas River (L1)	0	10	20	0	29
Weekly total - 2018	378	18	336	0	732
Weekly total - 2017	437	20	425	0	882
2018 YTD[1]	20,752	1,508	11,083	101	33,445
2017 YTD	19,877	2,084	13,920	300	36,181
2018 as % of 2017 YTD	104	72	80	34	92
Last 4 weeks as % of 2017[2]	101	137	62	23	78
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.

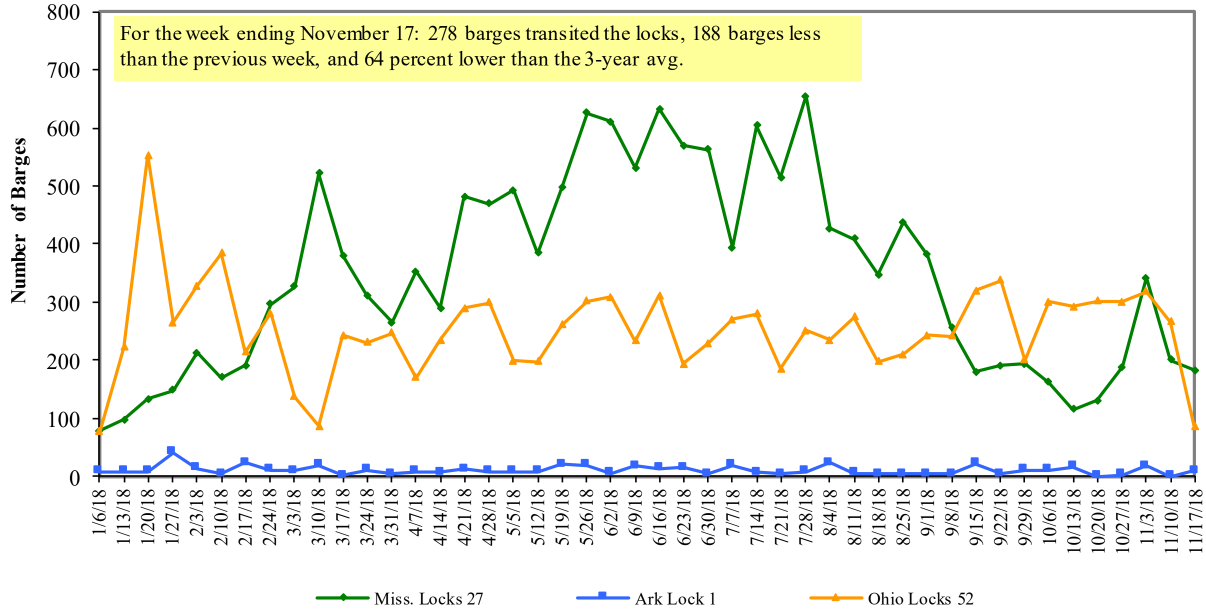
[2] As a percent of same period in 2017.

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

Source: U.S. Army Corps of Engineers

Figure 11

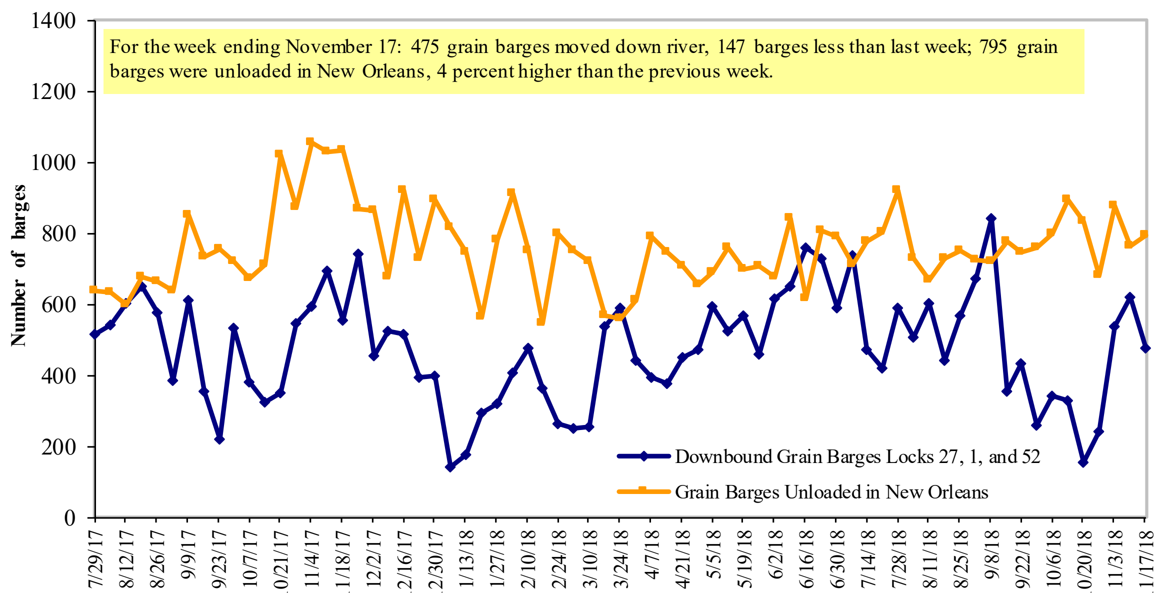
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 11/19/2018 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.295	-0.019	0.399
	New England	3.347	-0.009	0.485
	Central Atlantic	3.466	-0.017	0.411
	Lower Atlantic	3.165	-0.022	0.376
II	Midwest[2]	3.216	-0.046	0.343
III	Gulf Coast[3]	3.045	-0.040	0.356
IV	Rocky Mountain	3.360	-0.018	0.357
V	West Coast	3.767	-0.040	0.389
	West Coast less California	3.475	-0.039	0.368
	California	4.000	-0.040	0.401
Total	U.S.	3.282	-0.035	0.370

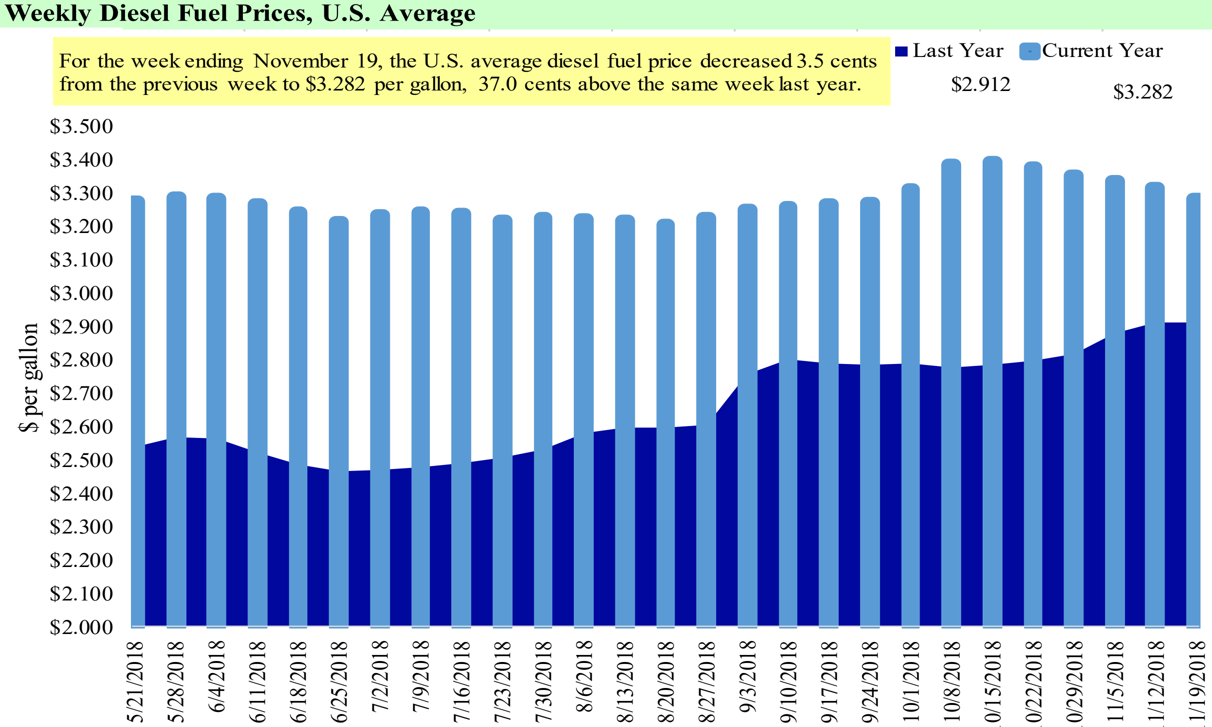
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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]									
11/8/2018	1,427	676	1,971	1,111	156	5,341	11,712	12,329	29,382
This week year ago	1,989	521	1,794	1,306	59	5,668	14,195	15,620	35,484
Cumulative exports-marketing year[2]									
2018/19 YTD	2,624	1,049	2,650	2,277	243	8,843	11,714	9,913	30,470
2017/18 YTD	4,520	1,035	2,892	2,465	201	11,113	6,147	16,963	34,223
YTD 2018/19 as % of 2017/18	58	101	92	92	121	80	191	58	89
Last 4 wks as % of same period 2017/18	71	121	99	81	223	88	87	87	87
2017/18 Total	9,150	2,343	5,689	4,854	384	22,419	57,209	56,214	135,842
2016/17 Total	11,096	2,285	7,923	4,254	484	26,042	41,864	51,156	119,062

[1] Current unshipped (outstanding) export sales to date

[2] Shipped export sales to date; new marketing year now in effect for corn, soybeans, and 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 11/08/2018	Total Commitments[2] 2018/19 Current MY	Total Commitments[2] 2017/18 Last MY	% change current MY from last MY	Exports[3] 3-year avg 2015-2017
	- 1,000 mt -			
Mexico	7,696	8,430	(9)	13,691
Japan	3,959	3,161	25	11,247
Korea	1,876	871	115	4,754
Colombia	1,197	1,273	(6)	4,678
Peru	895	1,057	(15)	2,975
Top 5 Importers	**15,623**	**14,792**	**6**	**37,344**
Total US corn export sales	**23,426**	**20,343**	**15**	**53,184**
% of Projected	38%	33%		
Change from prior week[2]	**893**	**950**		
Top 5 importers' share of U.S. corn export sales	67%	73%		70%
USDA forecast, November 2018	**62,341**	**62,036**	**0**	
Corn Use for Ethanol USDA forecast, November 2018	**143,510**	**142,266**	**1**	

(n) indicates negative number.

[1]Based on FAS Marketing Year Ranking Reports for 2017/18 - 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 11/08/2018	Total Commitments[2] 2018/19 Current MY	2017/18 Last MY	% change current MY from last MY	Exports[3] 3-yr avg. 2015-2017
	- 1,000 mt -			- 1,000 mt -
China	714	18,239	(96)	31,228
Mexico	3,344	1,672	100	3,716
Indonesia	728	693	5	2,250
Japan	902	860	5	2,145
Netherlands	786	501	57	2,209
Top 5 importers	**6,474**	**21,965**	**(71)**	**41,549**
Total US soybean export sales	**22,242**	**32,583**	**(32)**	**55,113**
% of Projected	43%	56%		
Change from prior week[2]	**471**	**1,105**		
Top 5 importers' share of U.S. soybean export sales	29%	67%		**75%**
USDA forecast, November 2018	**51,771**	**58,011**	**89**	

(n) indicates negative number.

[1]Based on FAS Marketing Year Ranking Reports for 2017/18 - 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 11/08/2018	Total Commitments[2] 2018/19 Current MY	2017/18 Last MY	% change current MY from last MY	Exports[3] 3-yr avg 2015-2017
	- 1,000 mt -			- 1,000 mt -
Mexico	1,633	2,017	(19)	2,781
Japan	1,769	1,800	(2)	2,649
Philippines	2,134	1,957	9	2,441
Korea	984	1,215	(19)	1,257
Nigeria	628	816	(23)	1,254
Indonesia	540	796	(32)	1,076
Taiwan	671	746	(10)	1,066
China	0	782	(100)	944
Colombia	363	203	79	714
Thailand	538	440	22	618
Top 10 importers	**9,260**	**10,771**	(14)	**14,800**
Total US wheat export sales	**14,184**	**16,781**	**(15)**	**22,869**
% of Projected	51%	68%		
Change from prior week[2]	**438**	**489**		
Top 10 importers' share of U.S. wheat export sales	65%	64%		65%
USDA forecast, November 2018	**27,929**	**24,550**	**14**	

(n) indicates negative number.

[1] Based on FAS Marketing Year Ranking Reports for 2017/18 - 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 11/15/18	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	322	201	160	11,528	13,162	88	178	173	14,805
Corn	237	418	57	18,196	10,259	177	n/a	693	10,928
Soybeans	67	151	44	7,458	10,610	70	24	22	13,246
Total	**627**	**770**	**81**	**37,182**	**34,031**	**109**	**83**	**75**	**38,978**
Mississippi Gulf									
Wheat	33	57	58	3,458	3,909	88	111	106	4,198
Corn	461	514	90	30,586	26,454	116	154	139	28,690
Soybeans	816	972	84	23,807	27,399	87	65	63	32,911
Total	**1,311**	**1,543**	**85**	**57,851**	**57,762**	**100**	**84**	**79**	**65,800**
Texas Gulf									
Wheat	115	98	118	2,758	5,907	47	73	70	6,354
Corn	0	37	0	702	700	100	229	92	733
Soybeans	0	0	n/a	69	219	31	0	0	292
Total	**115**	**135**	**86**	**3,528**	**6,825**	**52**	**51**	**37**	**7,379**
Interior									
Wheat	37	8	484	1,435	1,556	92	157	127	1,727
Corn	80	169	48	7,803	7,866	99	89	107	8,758
Soybeans	132	125	106	6,082	4,878	125	94	102	5,508
Total	**249**	**301**	**83**	**15,319**	**14,299**	**107**	**95**	**106**	**15,993**
Great Lakes									
Wheat	29	0	n/a	727	596	122	141	82	711
Corn	0	0	n/a	404	189	214	132	71	192
Soybeans	83	36	232	1,019	770	132	85	63	890
Total	**112**	**36**	**312**	**2,149**	**1,555**	**138**	**96**	**67**	**1,793**
Atlantic									
Wheat	0	0	n/a	69	46	150	0	0	46
Corn	5	0	n/a	129	28	462	409	53	32
Soybeans	12	112	11	1,721	1,547	111	40	44	2,001
Total	**17**	**112**	**15**	**1,919**	**1,621**	**118**	**44**	**42**	**2,079**
U.S. total from ports*									
Wheat	536	364	147	19,974	25,175	79	135	124	27,841
Corn	783	1,137	69	57,819	45,495	127	191	170	49,333
Soybeans	1,111	1,396	80	40,155	45,423	88	53	50	54,847
Total	**2,431**	**2,897**	**84**	**117,948**	**116,093**	**102**	**82**	**77**	**132,021**

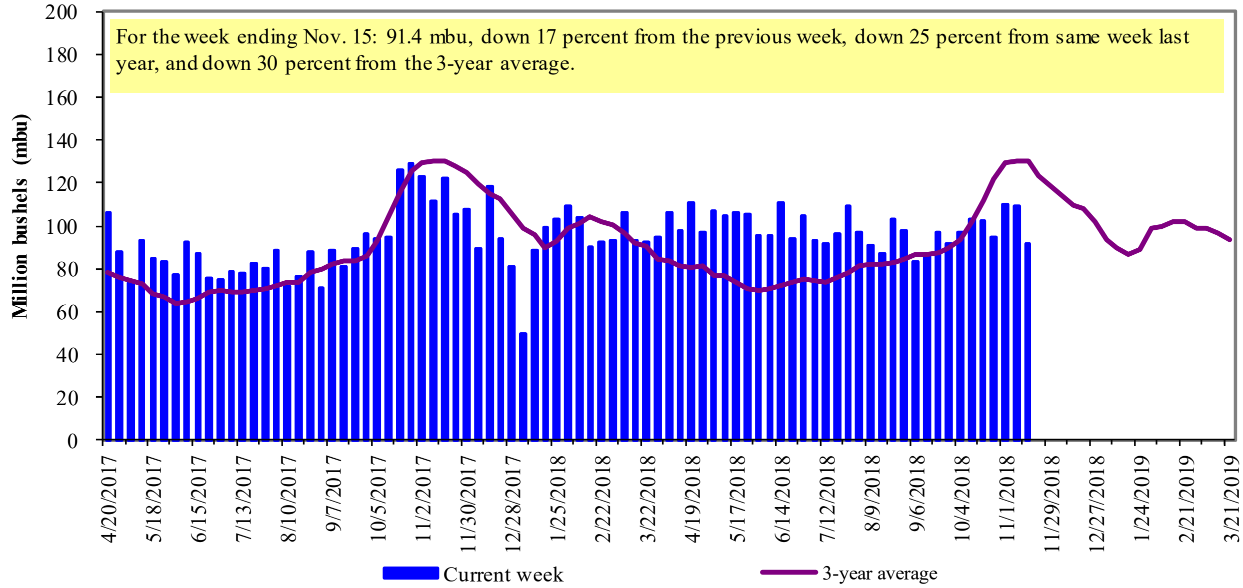
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

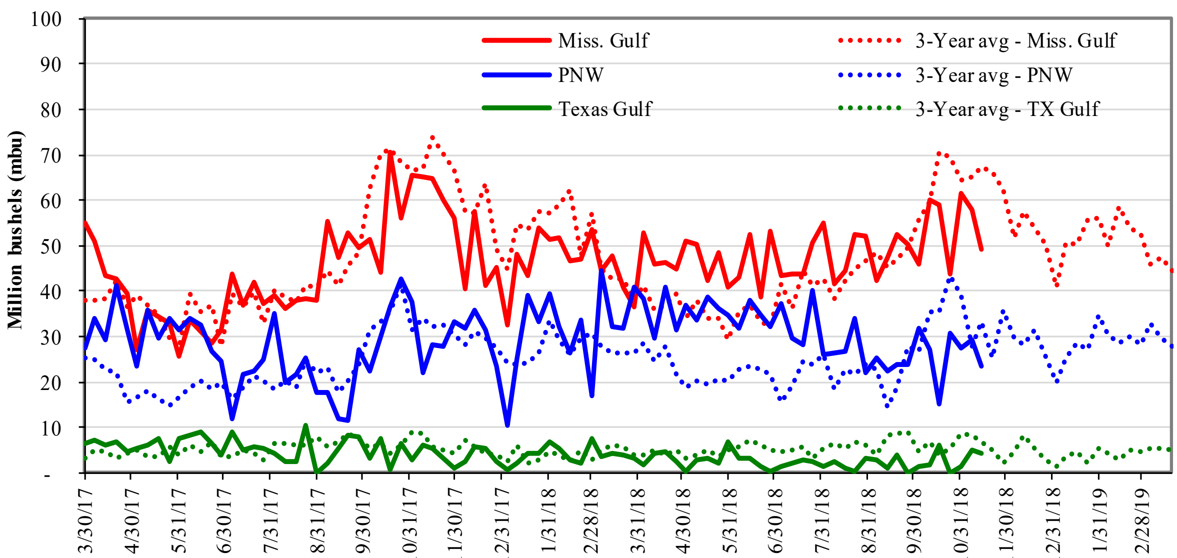
U.S. grain inspected for export (wheat, corn, and soybeans)



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 11/15/18 inspections (mbu):	
Mississippi Gulf:	49.4
PNW:	23.6
Texas Gulf:	4.2

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last Week:	down 15	down 16	down 15	down 20
Last Year (same	down 24	down 20	down 23	down 16
3-yr avg. (4-wk. mov.	down 26	down 41	down 27	down 34

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

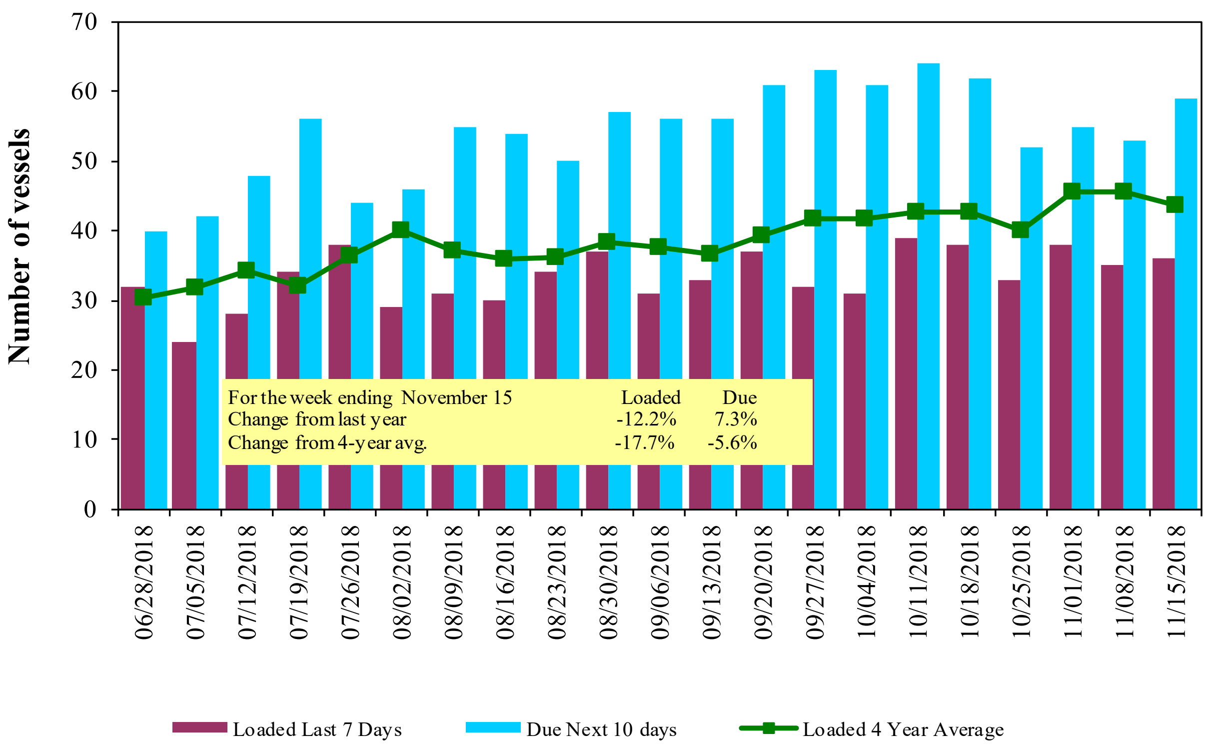
Ocean Transportation

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
11/15/2018	39	36	59	12
11/8/2018	47	35	53	14
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg.	46	38	56	20

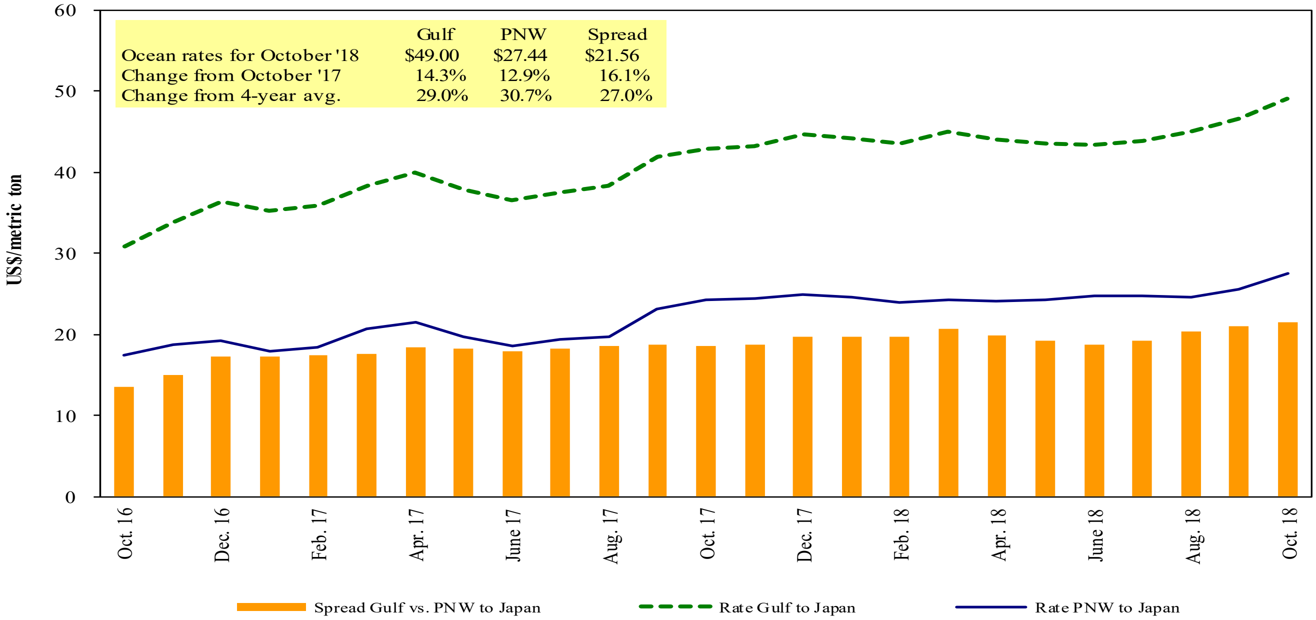
Source: Transportation & Marketing Program/AMS/USDA

Figure 16
U.S. Gulf Vessel Loading Activity



Source: Transportation & Marketing Program/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

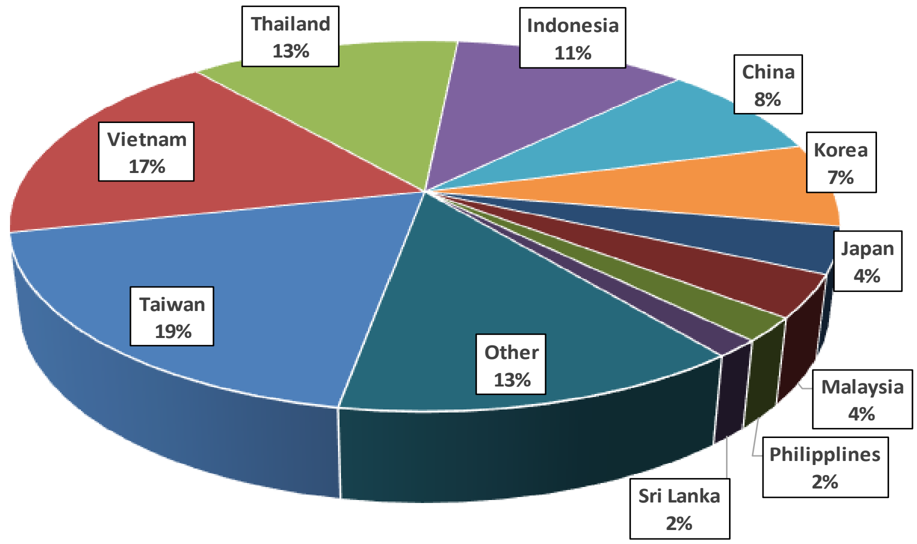
Table 18
Ocean Freight Rates For Selected Shipments, Week Ending 11/17/2018

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Pt. Sudan	Sorghum	Dec 7/17	30,430	71.88*
U.S. Gulf	Djibouti	Wheat	Nov 2/12	21,470	85.44*
U.S. Gulf	Djibouti	Wheat	Oct 1/15	25,340	77.65*
U.S. Gulf	Honduras	Soybean Meal	Oct 1/10	12,500	85.00*
PNW	Taiwan	Heavy Grain	Sep 15/Oct 31	63,000	25.00
Brazil	China	Heavy Grain	Dec 1/10	60,000	36.25
Brazil	China	Heavy Grain	Nov 20/30	60,000	38.00
Brazil	China	Heavy Grain	Nov 1/10	60,000	34.00
Brazil	China	Heavy Grain	Oct 5/15	60,000	33.75
Brazil	China	Heavy Grain	Sep 25/30	60,000	34.50
Brazil	China	Heavy Grain	Sep 10/20	60,000	35.75
Brazil	China	Heavy Grain	Aug 21/30	60,000	36.00
Brazil	China	Heavy Grain	Aug 18/28	60,000	36.00
Brazil	Malaysia	Heavy Grain	Aug 17/24	65,000	31.00
Brazil	S.Korea	Heavy Grain	Nov 5/10	66,000	43.00

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.

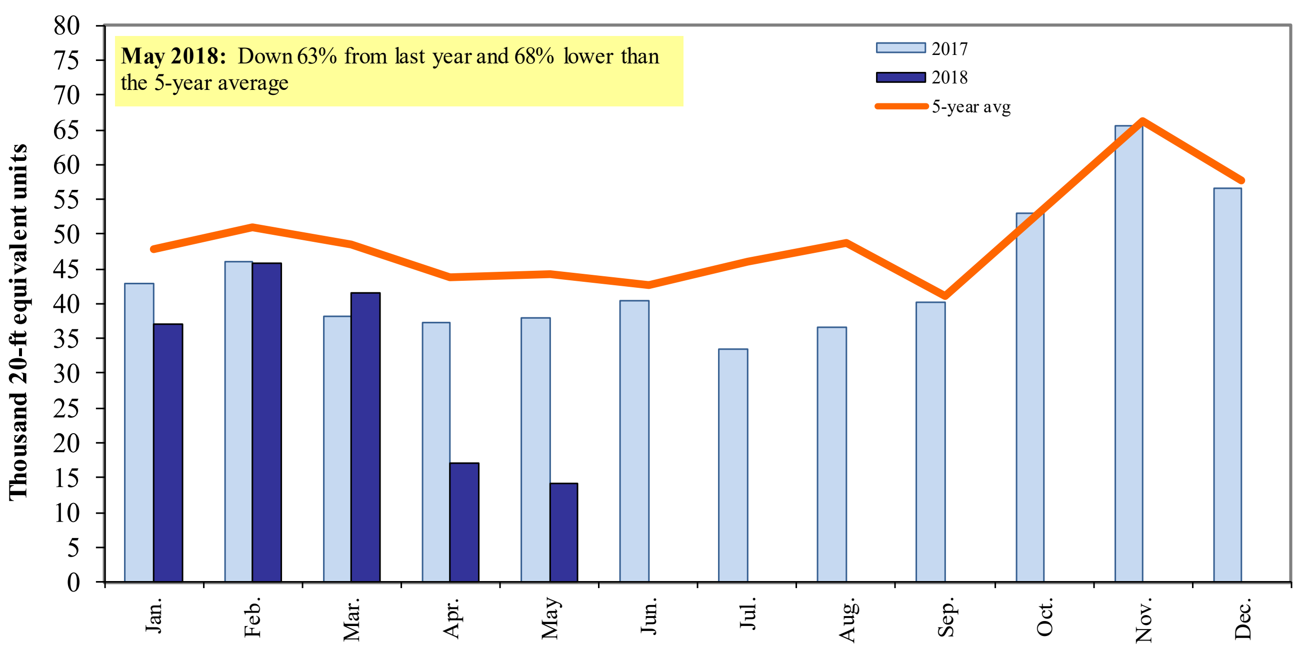
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-May 2018



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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