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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November 23, 2017

Contents

The next release is November 30, 2017

WEEKLY HIGHLIGHTS

FMCSA to provide 90-day Temporary Waiver from ELD Requirement for Agricultural Commodities

On November 20, in advance of the U.S. Department of Transportation's Federal Motor Carrier Safety Administration's (FMCSA) December 18, 2017 implementation deadline for the electronic logging device (ELD) rule, FMCSA announced it will provide a 90-day temporary waiver from the ELD requirement for transporters of agricultural commodities. The waiver was provided in order to ease the transition of motor carriers to the rule. In the announcement, FMCSA said it will provide additional guidance related to enforcement procedures during the ELD transition, such as the existing Hours-of-Service exemption for the agricultural industry, and guidance on the "personal conveyance" provision. FMCSA said the new guidance on the existing 150 air miles hours-of-service agricultural exemption will be provided to improve clarity for both law enforcement and the agricultural industry and allow the agricultural industry to maximize the use of this statutory exemption. FMCSA will consider comments received before publishing the final guidance.

Rock Removal Activities Expected to Delay Mississippi River Barge Traffic

Starting late November through early December, barge traffic can expect delays on the Mississippi River near Thebes, IL, as the U.S. Army Corps of Engineers is scheduled to begin a rock removal dredging operations at that site. The U.S. Coast Guard will restrict northbound tows to 28 barges and southbound tows to 15 barges during dredging operations. Work will be done during daylight hours, 7 days a week. During non-work hours, traffic will not be restricted. There is no estimate of project duration at this time. The need to dredge at this site has been an issue from late 2012 and early 2013 when extreme low water conditions threatened to stop navigation. During January 2013, rock removal operations and timely regional rainfall made water levels safe for navigation. Presently, the proposed rock removal activities are a preventive measure for future extreme low water events. The project has been postponed several times over the years due to higher than expected rivers levels that prevent the dredging activities.

Corn Inspections Rise, while Soybean Inspections Fall

For the week ending November 16, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 3.07 million metric tons (mmt), up 2 percent from the previous week, down 24 percent from the same time last year, and down 12 percent from the 3-year average. Corn inspections accounted for the increase in total inspections, rising 60 percent from last week. Soybean inspections were down 2 percent from the previous week, continuing a seasonal decline after peaking in the week ending October 26. While seasonal trends for soybean inspections tend to decline after October and early November, corn inspections generally start to rise around this time of the year.

Snapshots by Sector

Export Sales

For the week ending November 9, **unshipped balances** of wheat, corn, and soybeans totaled 35.5 mmt, down 17 percent from the same time last year. Net weekly **wheat export sales** were .489 mmt, down 37 percent from the previous week. Net **corn export sales** were .950 mmt, down 60 percent from the previous week, and net **soybean export sales** were 1.11 mmt for the same period, down 5 percent from the previous week.

Rail

U.S. Class I railroads originated 22,845 **grain carloads** for the week ending November 11, down 2 percent from the previous week, down 15 percent from last year, and down 3 percent from the 3-year average.

Average December shuttle **secondary railcar** bids/offers per car were $91 below tariff for the week ending November 16, up $22 from last week, and $60 lower than last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending November 18, **barge grain movements** totaled 881,583 tons, 20 percent lower than the previous week, and down 22 percent from the same period last year.

For the week ending November 18, 554 grain barges **moved down river**, down 20 percent from last week. 1,033 grain barges were **unloaded in New Orleans**, about the same as the previous week.

Ocean

For the week ending November 16, 41 **ocean-going grain vessels** were loaded in the Gulf, 11 percent less than the same period last year. Fifty-five vessels are expected to be loaded within the next 10 days, 25 percent less than the same period last year.

For the week ending November 16, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $42.00 per metric ton, 2 percent less than the previous week. The cost of shipping from the PNW to Japan was $24.00 per metric ton, 2 percent less than the previous week.

Fuel

During the week ending November 20, average **diesel fuel prices** remain almost unchanged from the previous week at $2.91 per gallon, 49 cents above the same week last year.

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Feature Article/Calendar

Third Quarter Corn and Soybean Transportation Costs Up; Landed Costs Down

During the third quarter of 2017, total overall transportation costs for shipping corn and soybeans to Japan from Minneapolis, MN, via both the Gulf and Pacific Northwest (PNW) were up compared to the second quarter. Year-to-year transportation costs for shipping each grain were up due to increasing rates for each mode. Landed costs were mostly down from quarter to quarter because of lower farm values, and up year-to-year for corn, but down for soybeans.

U.S. Gulf Costs: Transportation costs for shipping corn and soybeans from Minneapolis, MN, through the U.S. Gulf to Japan during the third quarter 2017 increased from the second quarter. Truck, barge, and ocean rates increased from the previous quarter (*see table 1*). The costs for transporting corn and soybeans to the Gulf increased 10 percent quarter to quarter and 8 percent from year to year. Ocean rates for shipping grain to Japan increased 3 percent from the second quarter in the Gulf. Ocean rates, however, jumped 31 percent from last year due to increased Chinese demand for iron ore and increasing Asian demand for grain and other bulk products (see *Grain Transportation Report (GTR) dated 10/26/17*). Barge rates for shipping grain to the Gulf jumped 24 percent from quarter to quarter as demand for barge services increased. Year-to-year barge rates, however, were down 18 percent. Last year's demand for barge services was higher due to the record grain harvest (see *GTR dated 11/17/16*). Truck rates increased 6 percent from quarter to quarter and 23 percent from year to year due to increased trucking activity.

Quarter-to-quarter total landed costs (farm value plus transportation costs) for shipping grain from Minneapolis, MN, to Japan through the U.S. Gulf decreased slightly for corn but remained unchanged for soybeans, ranging from $202 to $413 per metric ton (mt) (*see table 1*). Lower farm values pulled quarter-to-quarter landed cost down for corn. Year-to-year landed costs for shipping grain through the Gulf to Japan increased 2 percent for corn due to lower ocean rates and farm values, but costs decreased 3 percent for soybeans primarily because of lower barge rates and farm values. The farm value of corn decreased 7 percent from the previous quarter and 1 percent from last year. The farm value of soybeans, however, decreased 2 percent from the second quarter and 6 percent from last year. The transportation cost for shipping corn from the Gulf to Japan accounted for 39 percent of the total landed cost during the third quarter, above the past quarter and last year. The transportation cost share of the total landed cost for soybeans was 19 percent, also above the previous quarter and last year (*see table 1*).

Table 1: Cost of Shipping Corn and Soybeans from Minneapolis to Japan through the U.S. Gulf

	Corn					Soybeans				
		$/metric ton		Percent change			$/metric ton		Percent Change	
	3rdQtr 16	2ndQtr 17	3rdQtr 17	Yr. to Yr.	Qtr to Qtr	3rdQtr 16	2ndQtr 17	3rdQtr 17	Yr. to Yr.	Qtr to Qtr
Truck	10.58	12.30	13.02	23.06	5.85	10.58	12.30	13.02	23.06	5.85
Barge	32.93	21.55	26.99	-18.04	25.24	32.93	21.55	26.99	-18.04	25.24
Ocean	29.92	38.08	39.23	31.12	3.02	29.92	38.08	39.23	31.12	3.02
Total Transportation Cost	73.43	71.93	79.24	7.91	10.16	73.43	71.93	79.24	7.91	10.16
Farm Value [1]	124.27	131.62	122.83	-1.16	-6.68	353.84	340.00	333.76	-5.67	-1.84
Total Landed Cost	197.7	203.55	202.07	2.21	-0.73	427.27	411.93	413	-3.34	0.26
Transportation % Landed Cost	37.14	35.34	39.21			17.19	17.46	19.19		

Table 2: Cost of Shipping Corn and Soybeans from Minneapolis to Japan through the U.S. PNW

	Corn					Soybeans				
		$/metric ton		Percent change			$/metric ton		Percent Change	
	3rdQtr 16	2ndQtr 17	3rdQtr 17	Yr. to Yr.	Qtr to Qtr	3rdQtr 16	2ndQtr 17	3rdQtr 17	Yr. to Yr.	Qtr to Qtr
Truck	10.58	12.30	13.02	23.06	5.85	10.58	12.30	13.02	23.06	5.85
Rail[2]	49.23	49.90	49.65	0.85	-0.50	54.29	56.35	56.11	3.35	-0.43
Ocean	16.61	19.93	20.71	24.68	3.91	16.61	19.93	20.71	24.68	3.91
Total Transportation Cost	76.42	82.13	83.38	9.11	1.52	81.48	88.58	89.84	10.26	1.42
Farm Value [1]	124.27	131.62	122.83	-1.16	-6.68	353.84	340.00	333.76	-5.67	-1.84
Total Landed Cost	200.69	213.75	206.21	2.75	-3.53	435.32	428.58	423.60	-2.69	-1.16
Transportation % Landed Cost	38.08	38.42	40.43			18.72	20.67	21.21		

[1] Source: USDA/NASS, Agricultural Prices; includes quarterly prices in dollars per bushel converted to dollars per metric ton

[2] Rail tariffs include fuel surcharges and revisions for heavy axle rail cars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and cecondary market rates could exceed the base rail tariffs per car

Pacific Northwest Costs: Quarter-to-quarter transportation costs for shipping grain from Minneapolis, MN, to Japan via the Pacific Northwest (PNW) increased 2 percent for corn and over 1 percent for soybeans, due to mainly to higher trucking and ocean rates (*see table 2*). Year-to-year transportation costs were up 9 percent for corn and up 10 percent for soybeans, due also to higher trucking and ocean rates. Quarter-to-quarter rail rates for shipping grain to the PNW were down slightly for corn and soybeans, but year-to-year rail rates for shipping grain to the PNW were up 1 percent for corn and up 3 percent for soybeans. PNW ocean rates were up 4 percent quarter to quarter, and up 25 percent year to year.

Quarter-to-quarter PNW landed costs decreased 4 percent for corn and 1 percent for soybeans (*see table 2*). Quarter-to-quarter total landed costs for shipping corn through the PNW decreased due to lower rail rates and farm values. Landed costs for shipping corn and soybeans through the PNW to Japan ranged from $206 to $424 per mt. Year-to-year PNW landed costs increased 3 percent for corn but decreased 3 percent for soybeans. The transportation costs for corn shipped through the PNW to Japan accounted for about 40 percent of the total landed costs during the third quarter, greater than the previous quarter and last year. The third quarter transportation cost for soybeans shipped through the PNW to Japan accounted for 21 percent of the total landed costs, unchanged from the previous quarter but above last year. The farm value of corn accounted for 60 percent of the total landed costs for shipping to Japan from the PNW during the third quarter, below last year. Soybean farm value accounted for 79 percent of the total landed costs, also below last year.

Outlook: According to USDA's November *World Agricultural Supply and Demand Estimates* (WASDE) 2017/18 corn exports are projected to increase 4 percent from the October estimate but decreased 16 percent from last year. The drop was due in part to lower projected corn production. WASDE's November 2017/18 soybean export projections are unchanged from the October estimate, but 4 percent above last year. According to USDA, soybean production for 2017/18 is estimated to reach 4.43 million bushels, 3 percent above 2016/17. Johnny.Hill@ams.usda.gov

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit Train	Shuttle		Gulf	Pacific
11/22/17	195	267	211	174	189	170
11/15/17	196	262	207	211	192	174

[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	11/17/2017	11/9/2017
Corn	IL--Gulf	-0.64	-0.65
Corn	NE--Gulf	-0.77	-0.79
Soybean	IA--Gulf	-1.29	-1.06
HRW	KS--Gulf	-2.44	-2.75
HRS	ND--Portland	-1.76	-1.83

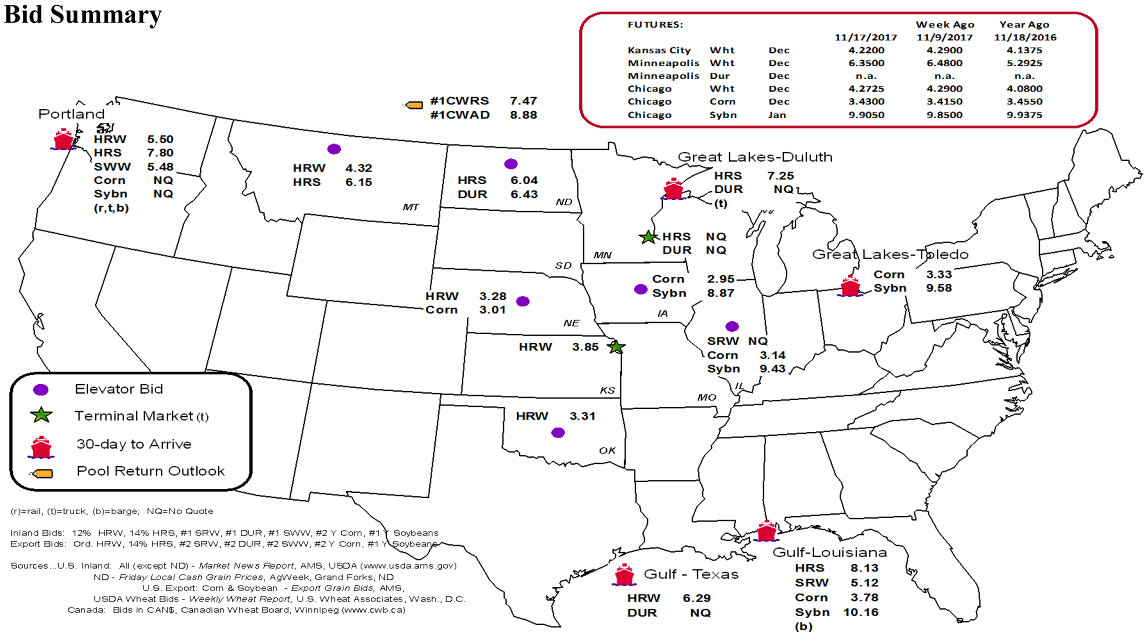
Note: nq = no quote; n/a = not available

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]
11/15/2017[p]	935	756	4,903	605	7,199	11/11/2017	2,372
11/08/2017[r]	336	1,118	5,847	893	8,194	11/4/2017	2,102
2017 YTD[r]	26,878	69,391	251,327	19,841	367,437	2017 YTD	107,064
2016 YTD[r]	31,595	74,342	258,938	22,700	387,575	2016 YTD	95,220
2017 YTD as % of 2016 YTD	85	93	97	87	95	% change YTD	112
Last 4 weeks as % of 2016[2]	51	41	84	67	70	Last 4wks % 2016	98
Last 4 weeks as % of 4-year avg.[2]	54	61	91	79	80	Last 4wks % 4 yr	108
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.

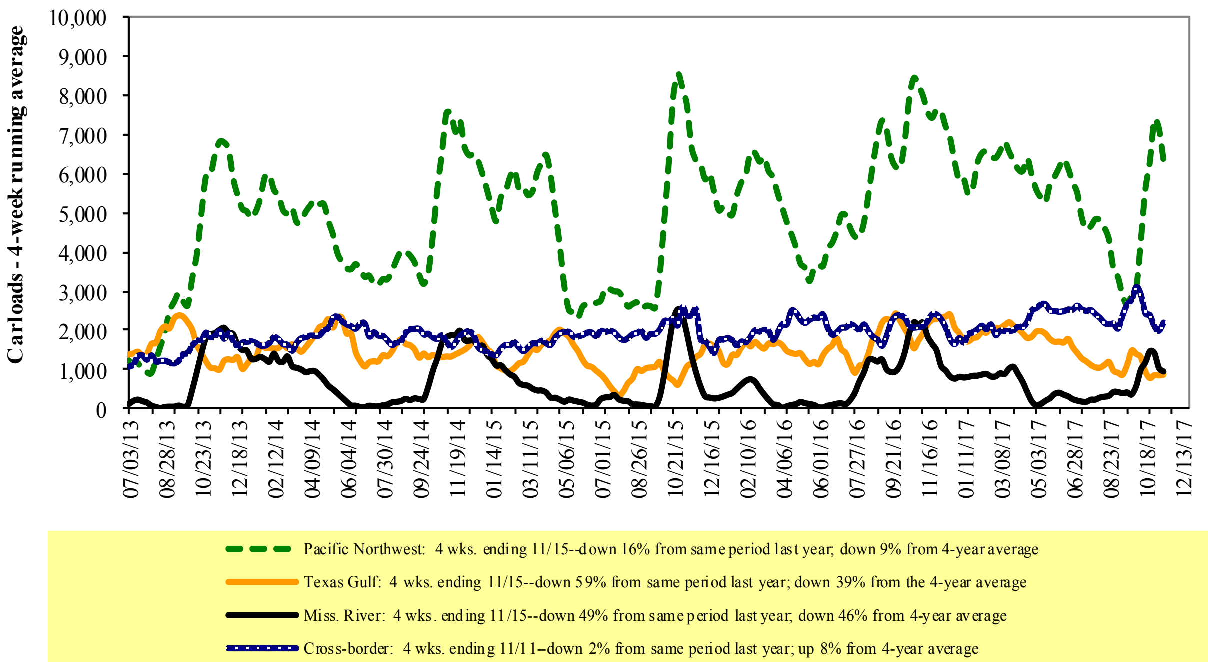
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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	
11/11/2017	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,701	3,298	11,778	828	5,240	22,845	4,704	5,513
This week last year	1,959	3,659	14,027	744	6,429	26,818	4,533	4,502
2017 YTD	76,572	124,580	498,919	43,876	255,146	999,093	172,869	211,245
2016 YTD	81,893	129,886	508,203	39,159	259,495	1,018,636	164,423	200,440
2017 YTD as % of 2016 YTD	94	96	98	112	98	98	105	105
Last 4 weeks as % of 2016*	81	77	92	127	80	87	89	111
Last 4 weeks as % of 3-yr avg.**	90	91	98	119	90	95	88	106
Total 2016	95,179	150,991	590,779	45,246	300,836	1,183,031	193,750	234,738

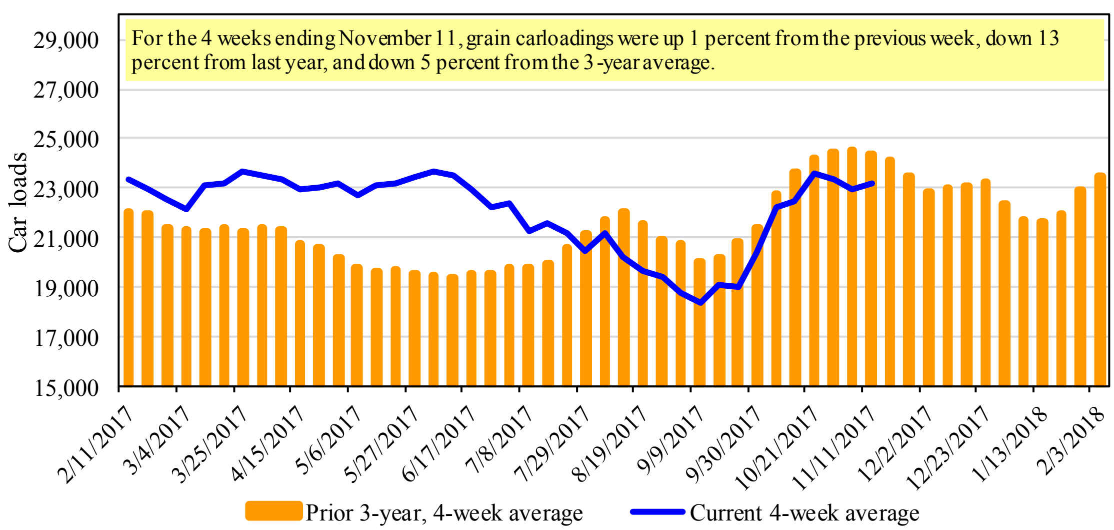
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 11/16/2017		Dec-17	Dec-16	Jan-18	Jan-17	Feb-18	Feb-17	Mar-18	Mar-17
BNSF[3]	COT grain units	no bids	no bids	no bids	no bids	no bids	no bids	no bids	no bids
	COT grain single-car[5]	0	27	0	0	0	no bids	0	no bids
UP[4]	GCAS/Region 1	no bids	no bids	no bids	no bids	no offer	no offer	n/a	n/a
	GCAS/Region 2	10	no bids	10	no bids	no offer	no offer	n/a	n/a

(Delivery period spans the month columns.)

[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.

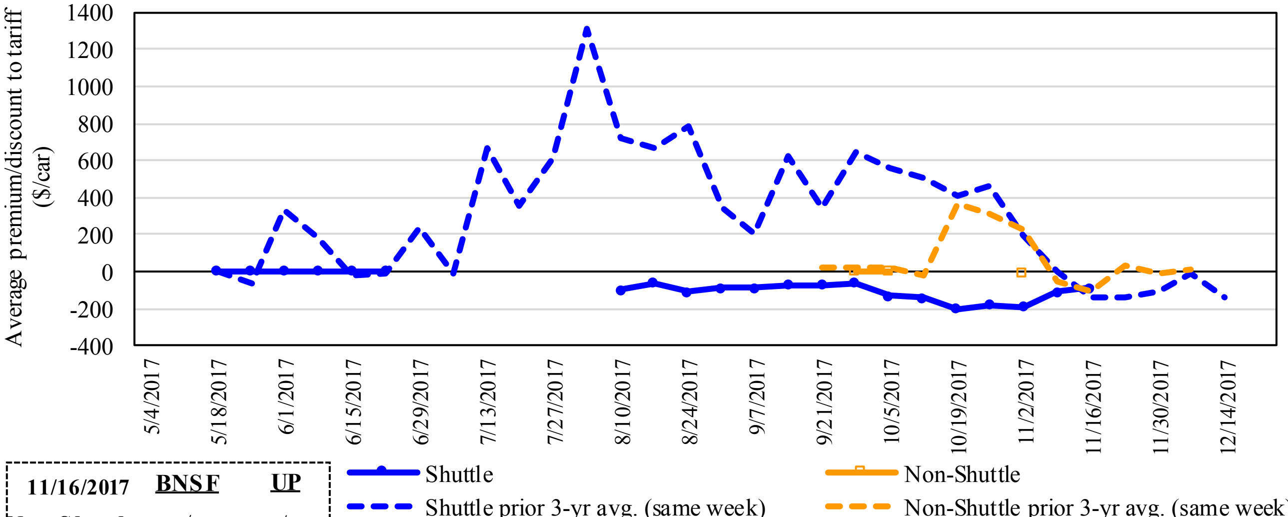
[5]Range is shown because average is not available. Not available = n/a.

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 December 2017, Secondary Market



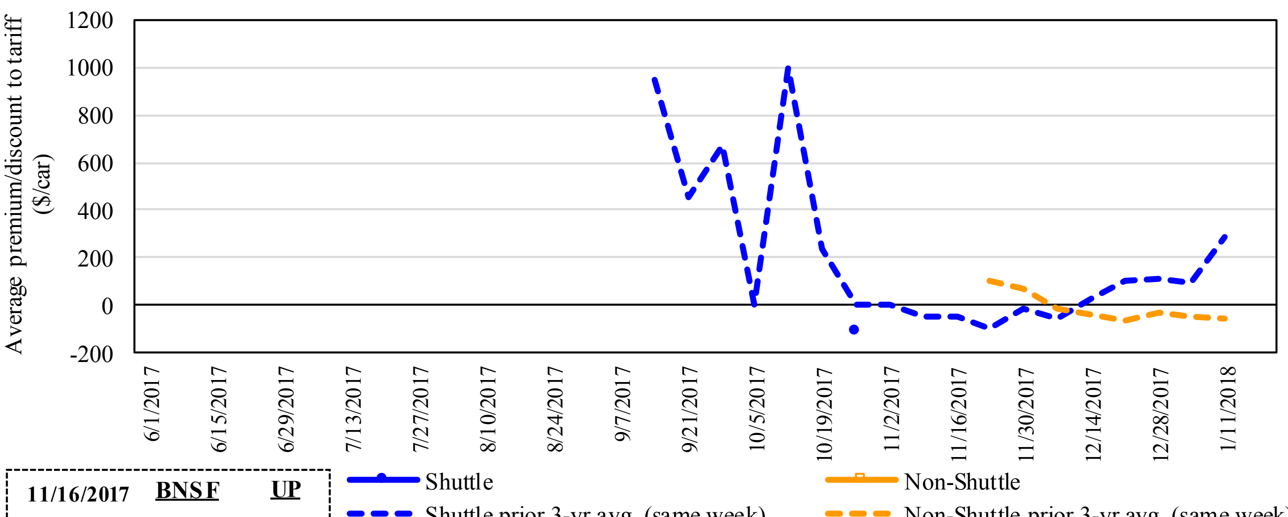
11/16/2017	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	$69	-$250

There were no Non-Shuttle bids/offers this week.
Average Shuttle bids/offers rose $22 this week and are $91 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 January 2018, Secondary Market



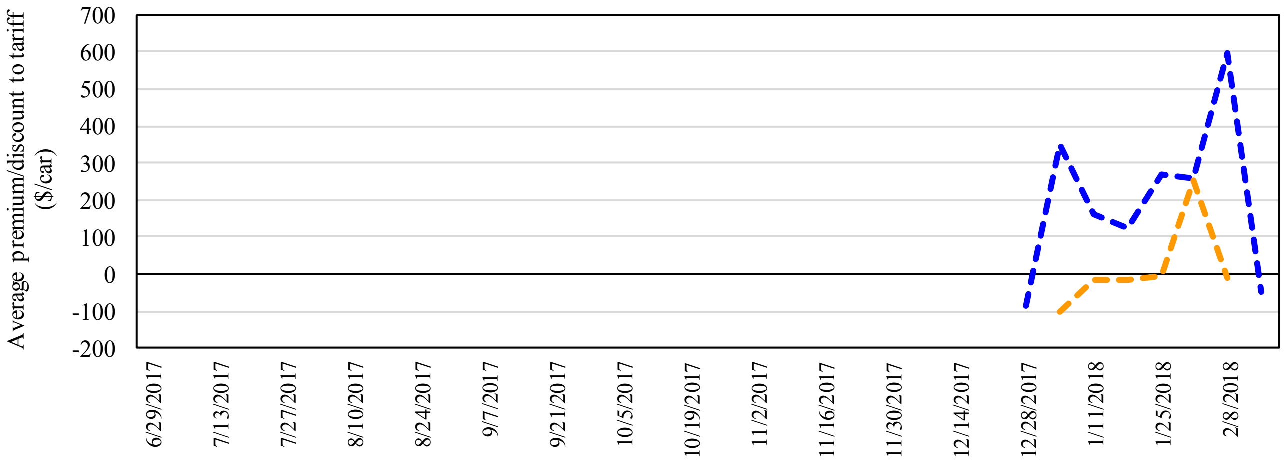
11/16/2017	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	n/a

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 Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in February 2018, Secondary Market



11/16/2017	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 Programs/AMS/USDA

Table 6

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

	For the week ending: 11/16/2017	Delivery period					
		Dec-17	Jan-18	Feb-18	Mar-18	Apr-18	May-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**	**69**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	94	n/a	n/a	n/a	n/a	n/a
	Change from same week 2016	55	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**(250)**	**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 2016	(175)	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 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]

November, 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	$71	$39.26	$1.07	-29
	Grand Forks, ND	Duluth-Superior, MN	$4,143	$0	$41.14	$1.12	9
	Wichita, KS	Los Angeles, CA	$7,050	$0	$70.01	$1.91	70
	Wichita, KS	New Orleans, LA	$4,540	$125	$46.32	$1.26	-33
	Sioux Falls, SD	Galveston-Houston, TX	$6,786	$0	$67.39	$1.83	52
	Northwest KS	Galveston-Houston, TX	$4,816	$137	$49.18	$1.34	-24
	Amarillo, TX	Los Angeles, CA	$5,021	$190	$51.75	$1.41	10
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,931	$141	$40.44	$1.03	-18
	Toledo, OH	Raleigh, NC	$6,344	$0	$63.00	$1.60	70
	Des Moines, IA	Davenport, IA	$2,258	$30	$22.72	$0.58	-62
	Indianapolis, IN	Atlanta, GA	$5,446	$0	$54.08	$1.37	140
	Indianapolis, IN	Knoxville, TN	$4,540	$0	$45.08	$1.15	-13
	Des Moines, IA	Little Rock, AR	$3,609	$88	$36.71	$0.93	-14
	Des Moines, IA	Los Angeles, CA	$5,327	$255	$55.43	$1.41	56
Soybeans	Minneapolis, MN	New Orleans, LA	$3,631	$127	$37.32	$1.02	-29
	Toledo, OH	Huntsville, AL	$5,287	$0	$52.50	$1.43	44
	Indianapolis, IN	Raleigh, NC	$6,460	$0	$64.15	$1.75	28
	Indianapolis, IN	Huntsville, AL	$4,764	$0	$47.31	$1.29	-23
	Champaign-Urbana, IL	New Orleans, LA	$4,745	$141	$48.52	$1.32	8
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,953	$0	$39.26	$1.07	-13
	Wichita, KS	Galveston-Houston, TX	$4,171	$0	$41.42	$1.13	6
	Chicago, IL	Albany, NY	$5,663	$0	$56.24	$1.53	46
	Grand Forks, ND	Portland, OR	$5,611	$0	$55.72	$1.52	2
	Grand Forks, ND	Galveston-Houston, TX	$5,931	$0	$58.90	$1.60	6
	Northwest KS	Portland, OR	$5,812	$224	$59.94	$1.63	2
Corn	Minneapolis, MN	Portland, OR	$5,000	$0	$49.65	$1.26	-13
	Sioux Falls, SD	Tacoma, WA	$4,960	$0	$49.26	$1.25	-1
	Champaign-Urbana, IL	New Orleans, LA	$3,731	$141	$38.45	$0.98	-22
	Lincoln, NE	Galveston-Houston, TX	$3,700	$0	$36.74	$0.93	4
	Des Moines, IA	Amarillo, TX	$3,970	$110	$40.52	$1.03	10
	Minneapolis, MN	Tacoma, WA	$5,000	$0	$49.65	$1.26	27
	Council Bluffs, IA	Stockton, CA	$4,820	$0	$47.86	$1.22	-4
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,600	$0	$55.61	$1.51	18
	Minneapolis, MN	Portland, OR	$5,650	$0	$56.11	$1.53	1
	Fargo, ND	Tacoma, WA	$5,500	$0	$54.62	$1.49	-3
	Council Bluffs, IA	New Orleans, LA	$4,775	$162	$49.03	$1.33	-10
	Grand Island, NE	Portland, OR	$5,710	$229	$58.98	$1.61	41

[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: November, 2017							
	Origin		**Tariff**	**Fuel surcharge**	**Tariff plus surcharge per:**		**Percent change**[4]
Commodity	**state**	**Destination region**	**rate/car**[1]	**per car**[2]	**metric ton**[3]	**bushel**[3]	**Y/Y**
Wheat	MT	Chihuahua, CI	$7,459	$0	$76.21	$2.07	0
	OK	Cuautitlan, EM	$6,631	$98	$68.75	$1.87	1
	KS	Guadalajara, JA	$7,309	$273	$77.46	$2.11	5
	TX	Salinas Victoria, NL	$4,292	$60	$44.46	$1.21	3
Corn	IA	Guadalajara, JA	$8,313	$239	$87.38	$2.22	3
	SD	Celaya, GJ	$7,700	$0	$78.68	$2.00	2
	NE	Queretaro, QA	$8,013	$205	$83.97	$2.13	3
	SD	Salinas Victoria, NL	$6,743	$0	$68.90	$1.75	2
	MO	Tlalnepantla, EM	$7,379	$200	$77.44	$1.97	3
	SD	Torreon, CU	$7,300	$0	$74.59	$1.89	2
Soybeans	MO	Bojay (Tula), HG	$8,134	$223	$85.39	$2.32	-5
	NE	Guadalajara, JA	$8,692	$242	$91.28	$2.48	-1
	IA	El Castillo, JA	$8,960	$0	$91.55	$2.49	0
	KS	Torreon, CU	$7,489	$175	$78.31	$2.13	1
Sorghum	NE	Celaya, GJ	$7,345	$219	$77.29	$1.96	4
	KS	Queretaro, QA	$7,819	$122	$81.14	$2.06	4
	NE	Salinas Victoria, NL	$6,452	$98	$66.92	$1.70	5
	NE	Torreon, CU	$6,790	$167	$71.08	$1.80	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

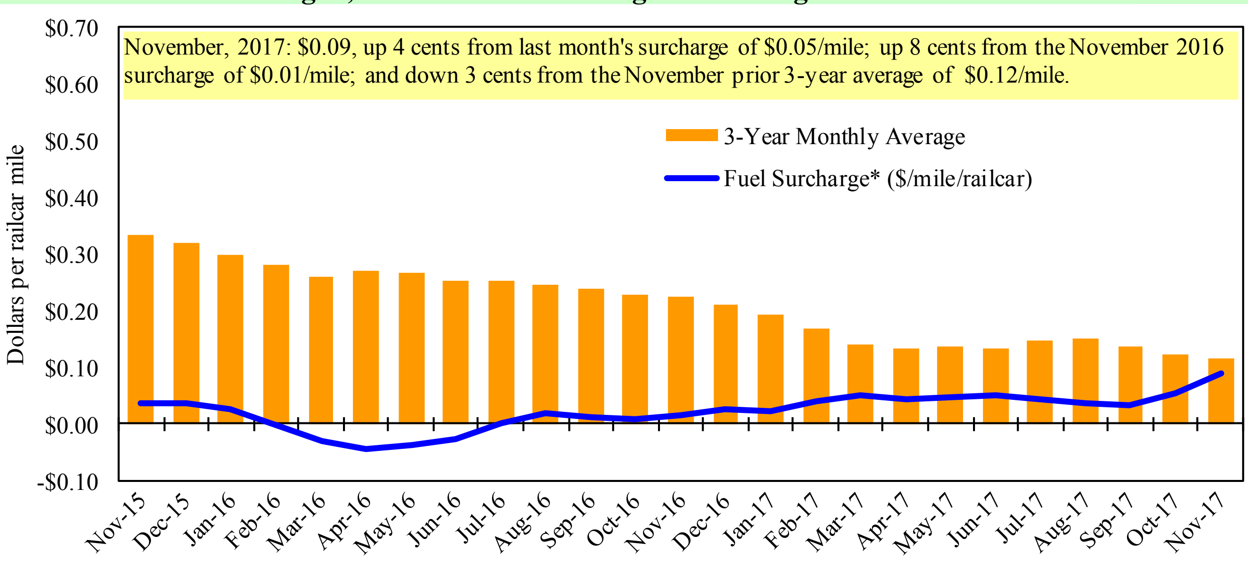
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[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]

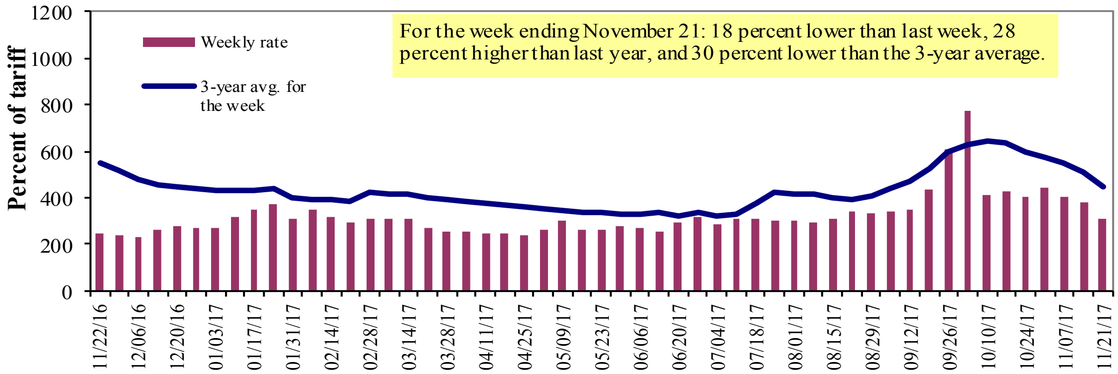


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.
Sources: 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 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]	11/21/2017	395	323	313	215	333	333	205
	11/14/2017	408	368	380	255	470	470	235
$/ton	11/21/2017	24.45	17.18	14.52	8.58	15.62	13.45	6.44
	11/14/2017	25.26	19.58	17.63	10.17	22.04	18.99	7.38
Current week % change from the same week:								
	Last year	8	18	28	10	51	51	26
	3-year avg. [2]	-23	-32	-30	-40	-23	-23	-32
Rate[1]	December	-	-	300	208	240	240	190
	February	-	-	295	208	218	218	190

[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.

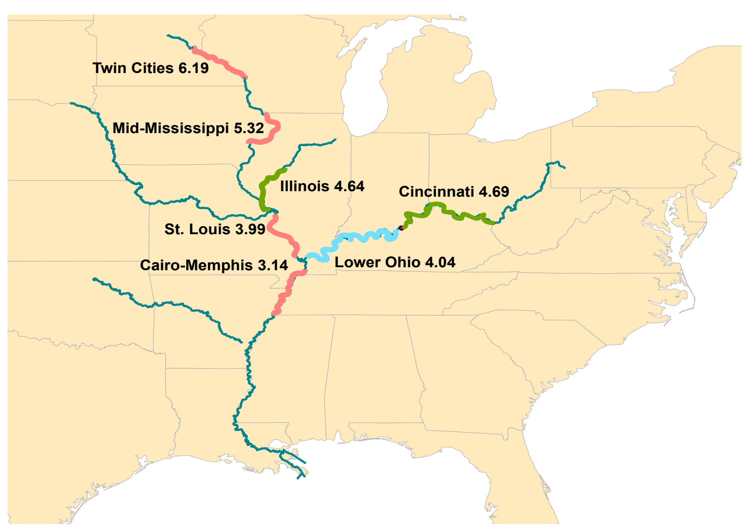
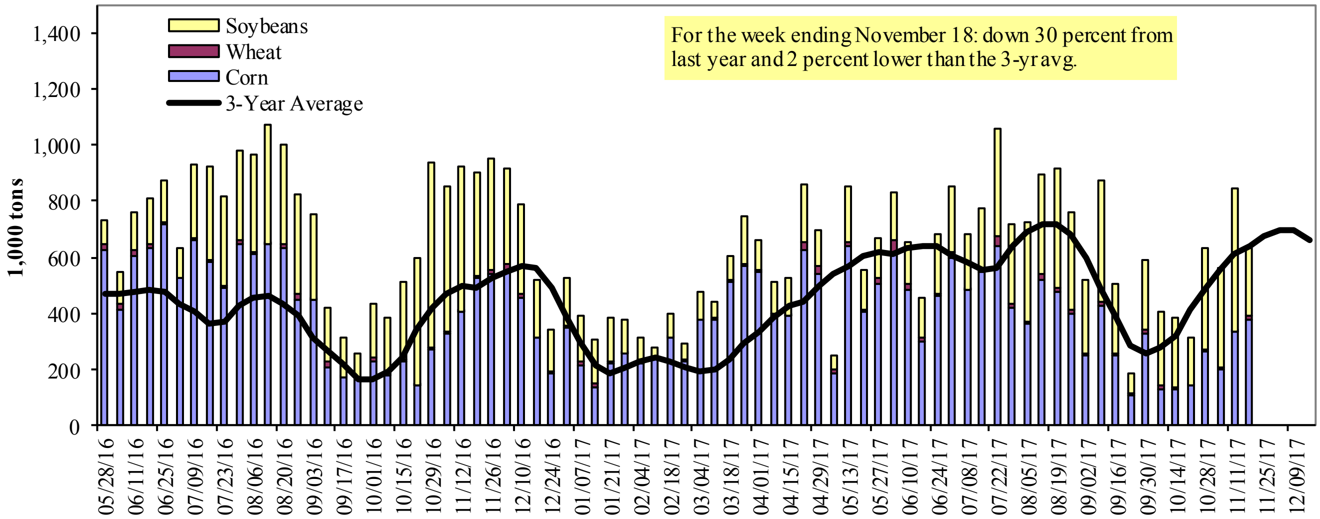


Figure 10

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 11/18/2017	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	227	11	136	0	374
Winfield, MO (L25)	316	6	221	0	542
Alton, IL (L26)	431	11	214	0	656
Granite City, IL (L27)	379	11	241	0	630
Illinois River (L8)	148	5	9	0	162
Ohio River (L52)	58	4	130	0	192
Arkansas River (L1)	0	6	54	0	60
Weekly total - 2017	437	20	425	0	882
Weekly total - 2016	585	9	531	5	1,130
2017 YTD[1]	19,877	2,084	13,920	300	36,181
2016 YTD	21,460	1,881	13,979	315	37,635
2017 as % of 2016 YTD	93	111	100	95	96
Last 4 weeks as % of 2016[2]	84	69	74	219	78
Total 2016	24,136	2,030	16,668	344	43,178

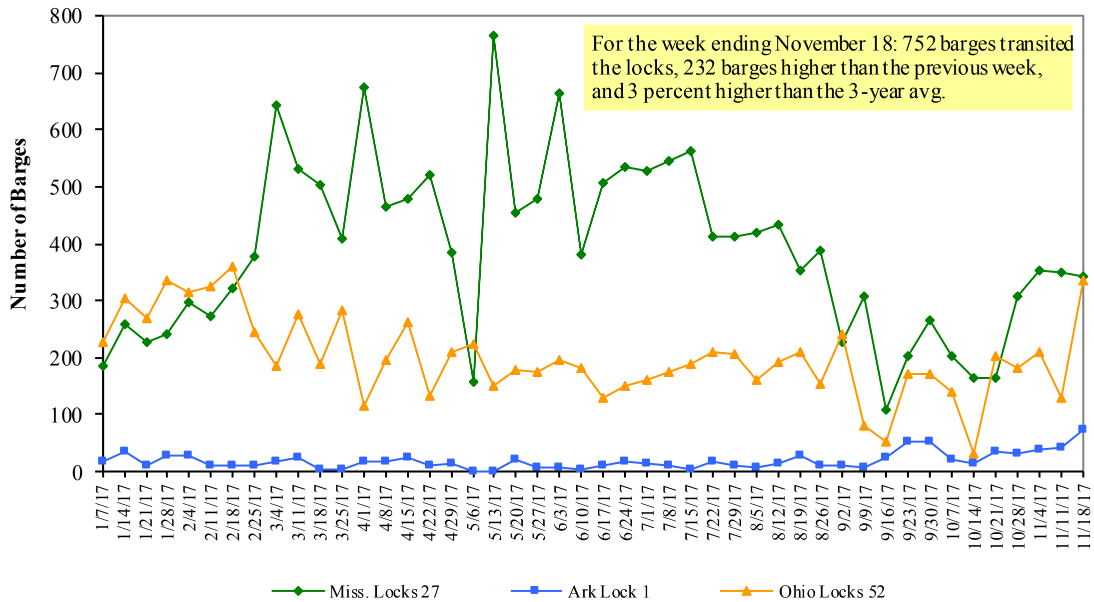
[1] Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: Total may not add exactly, due to rounding

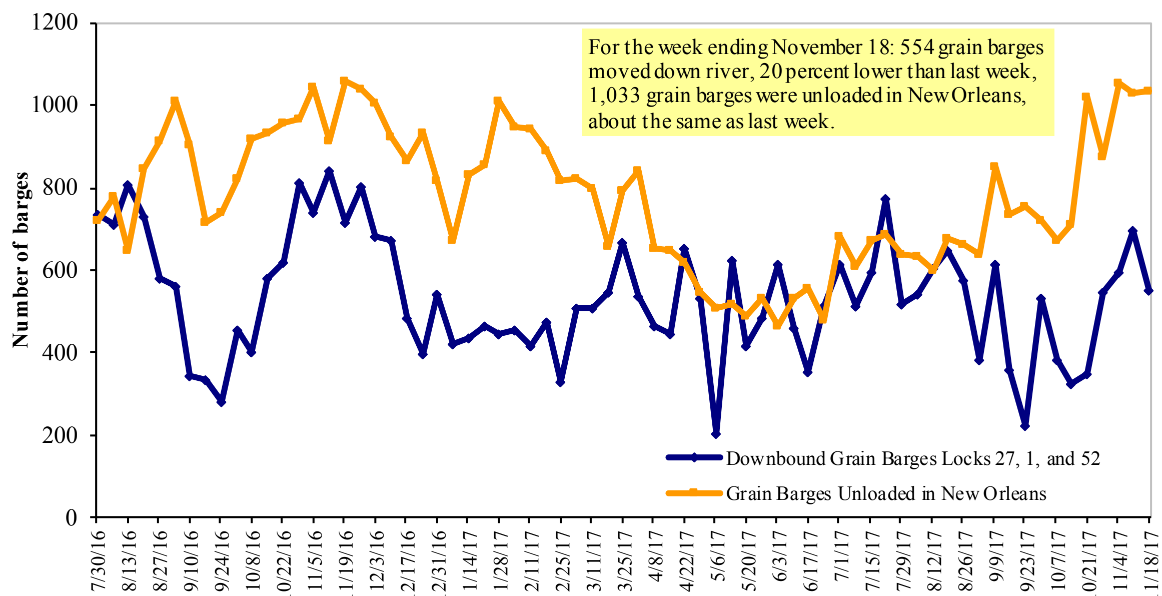
Source: U.S. Army Corps of Engineers

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, Week Ending 11/20/2017 (US $/gallon)

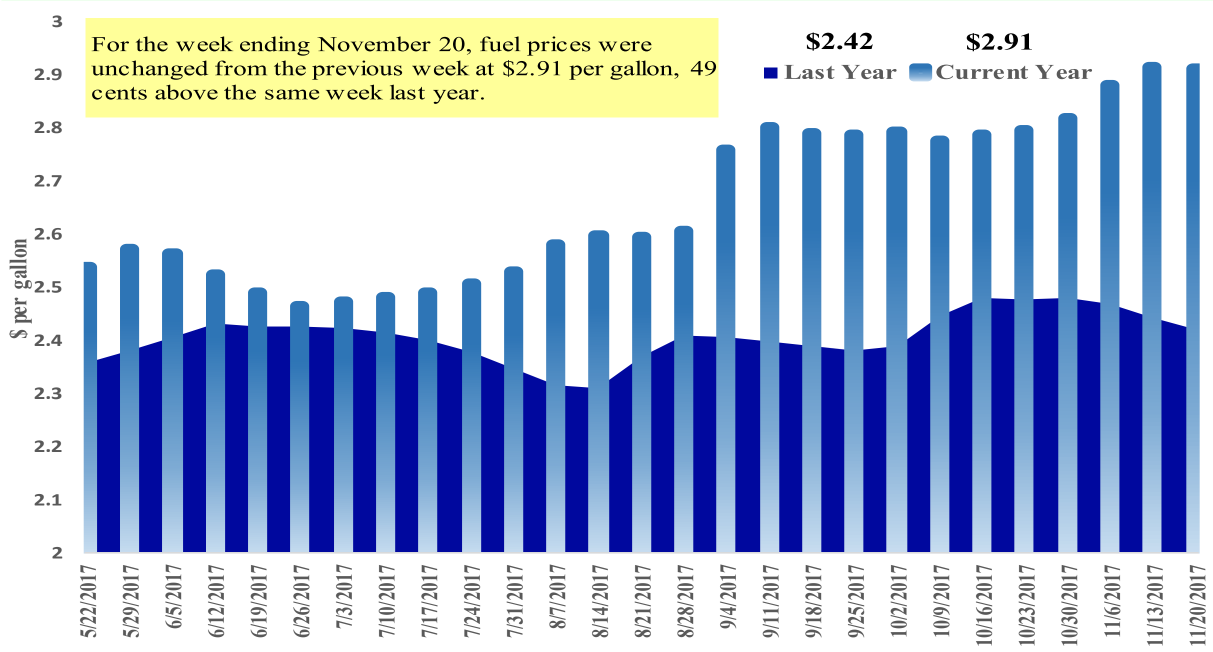
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.896	0.012	0.454
	New England	2.862	0.012	0.391
	Central Atlantic	3.055	0.037	0.506
	Lower Atlantic	2.789	-0.006	0.434
II	Midwest[2]	2.873	-0.011	0.517
III	Gulf Coast[3]	2.689	-0.008	0.393
IV	Rocky Mountain	3.003	0.011	0.548
V	West Coast	3.378	-0.012	0.648
	West Coast less California	3.107	-0.013	0.470
	California	3.599	-0.011	0.795
Total	U.S.	2.912	-0.003	0.491

[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	HRW	SRW	HRS	SWW	DUR	All wheat	Corn	Soybeans	Total
	Wheat								
Export Balances[1]									
11/9/2017	1,989	521	1,794	1,306	59	5,668	14,195	15,620	35,484
This week year ago	1,960	547	1,914	1,114	260	5,795	17,305	19,462	42,562
Cumulative exports-marketing year[2]									
2017/18 YTD	4,520	1,035	2,892	2,465	201	11,113	6,147	16,963	34,223
2016/17 YTD	5,318	974	3,530	1,904	151	11,877	10,341	19,009	41,227
YTD 2017/18 as % of 2016/17	85	106	82	129	133	94	59	89	83
Last 4 wks as % of same period 2016/17	89	97	88	114	24	91	74	89	83
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 11/09/2017	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	8,430	7,964	6	12,297
Japan	3,161	3,497	(10)	11,450
Korea	871	1,817	(52)	4,494
Colombia	1,273	1,751	(27)	4,179
Peru	1,057	946	12	2,693
Top 5 Importers	**14,792**	**15,975**	**(7)**	**35,113**
Total US corn export sales	**20,343**	**27,646**	**(26)**	**49,308**
% of Projected	42%	47%		
Change from prior week[2]	**950**	**1,661**		
Top 5 importers' share of U.S. corn export sales	73%	58%		71%
USDA forecast, November 2017	**48,982**	**58,346**	**(16)**	
Corn Use for Ethanol USDA forecast, November 2017	**139,065**	**138,151**	**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 11/09/2017	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	18,239	22,493	(19)	31,881
Mexico	1,672	1,646	2	3,452
Indonesia	693	581	19	1,987
Japan	18	1,046	(98)	2,067
Netherlands	501	364	0	2,098
Top 5 importers	**21,123**	**26,129**	**(19)**	**41,486**
Total US soybean export sales	**32,583**	**38,472**	**(15)**	**52,919**
% of Projected	53%	65%		
Change from prior week[2]	**1,105**	**1,406**		
Top 5 importers' share of U.S. soybean export sales	65%	68%		**78%**
USDA forecast, November 2017	**61,308**	**59,237**	**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 11/09/2017	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	1,800	1,550	16	2,620
Mexico	2,017	1,698	19	2,743
Philippines	1,957	1,884	4	2,395
Brazil	111	1,023	(89)	862
Nigeria	816	764	7	1,254
Korea	1,215	881	38	1,104
China	782	555	41	1,623
Taiwan	746	581	28	768
Indonesia	796	483	65	726
Colombia	429	544	(21)	635
Top 10 importers	**10,668**	**9,962**	7	**14,729**
Total US wheat export sales	**16,781**	**17,671**	**(5)**	**22,804**
% of Projected	62%	61%		
Change from prior week[2]	**489**	**598**		
Top 10 importers' share of U.S. wheat export sales	64%	56%		65%
USDA forecast, November 2017	**27,248**	**28,747**	**(5)**	

(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 11/16/17	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	80	140	58	13,161	10,945	120	82	116	12,325
Corn	0	21	1	10,259	10,929	94	4	11	12,009
Soybeans	639	440	145	10,567	11,427	92	85	94	14,447
Total	**720**	**600**	**120**	**33,986**	**33,300**	**102**	**76**	**93**	**38,782**
Mississippi Gulf									
Wheat	24	61	39	3,909	3,153	124	136	107	3,480
Corn	381	158	240	26,439	28,298	93	64	81	31,420
Soybeans	1,209	1,538	79	27,294	28,513	96	86	92	35,278
Total	**1,614**	**1,758**	**92**	**57,641**	**59,963**	**96**	**82**	**90**	**70,178**
Texas Gulf									
Wheat	145	105	138	5,907	5,306	111	66	103	6,019
Corn	0	4	0	700	1,501	47	20	46	1,669
Soybeans	0	60	0	219	890	25	35	48	1,105
Total	**145**	**169**	**86**	**6,825**	**7,697**	**89**	**48**	**70**	**8,792**
Interior									
Wheat	24	5	467	1,553	1,400	111	52	80	1,543
Corn	222	204	109	7,476	6,429	116	106	139	7,197
Soybeans	139	125	111	4,738	4,012	118	93	107	4,577
Total	**385**	**334**	**115**	**13,767**	**11,841**	**116**	**95**	**118**	**13,317**
Great Lakes									
Wheat	0	14	0	596	978	61	48	46	1,186
Corn	15	0	n/a	189	519	36	28	60	584
Soybeans	55	47	117	770	741	104	62	77	910
Total	**70**	**61**	**115**	**1,555**	**2,238**	**69**	**56**	**69**	**2,681**
Atlantic									
Wheat	0	0	n/a	46	289	16	3	7	315
Corn	0	0	n/a	29	293	10	7	18	294
Soybeans	137	89	154	1,658	1,657	100	104	118	2,269
Total	**137**	**89**	**154**	**1,732**	**2,238**	**77**	**84**	**108**	**2,878**
U.S. total from ports[2]									
Wheat	273	325	84	25,171	22,070	114	75	101	24,867
Corn	619	387	160	45,090	47,968	94	60	85	53,173
Soybeans	2,180	2,299	95	45,246	47,239	96	83	92	58,587
Total	**3,071**	**3,011**	**102**	**115,508**	**117,277**	**98**	**78**	**92**	**136,627**

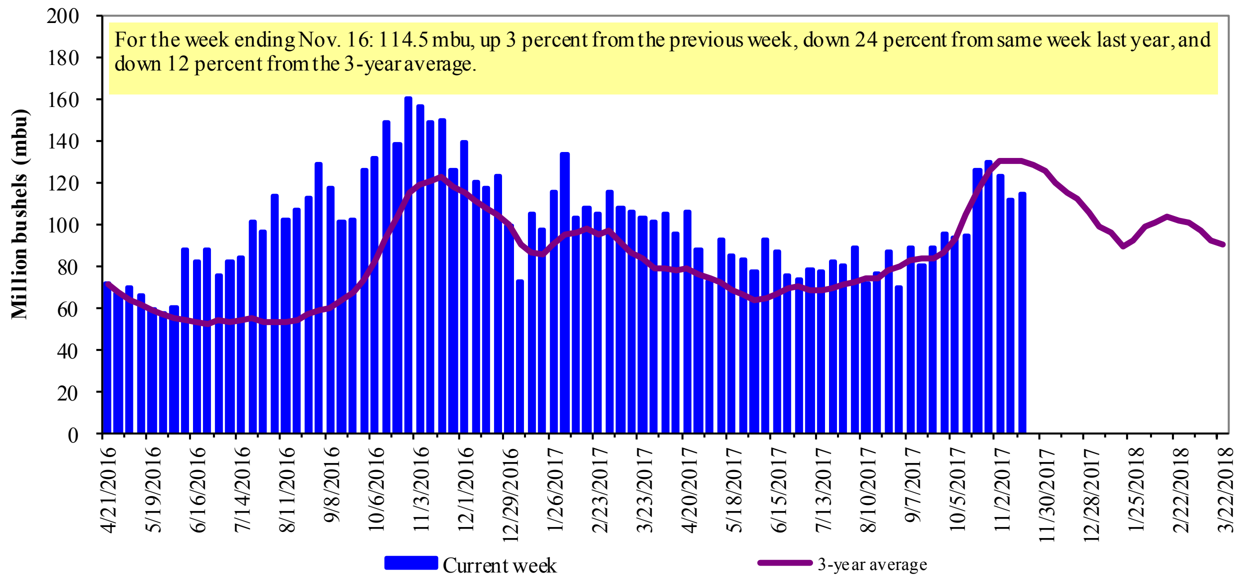
[1] Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

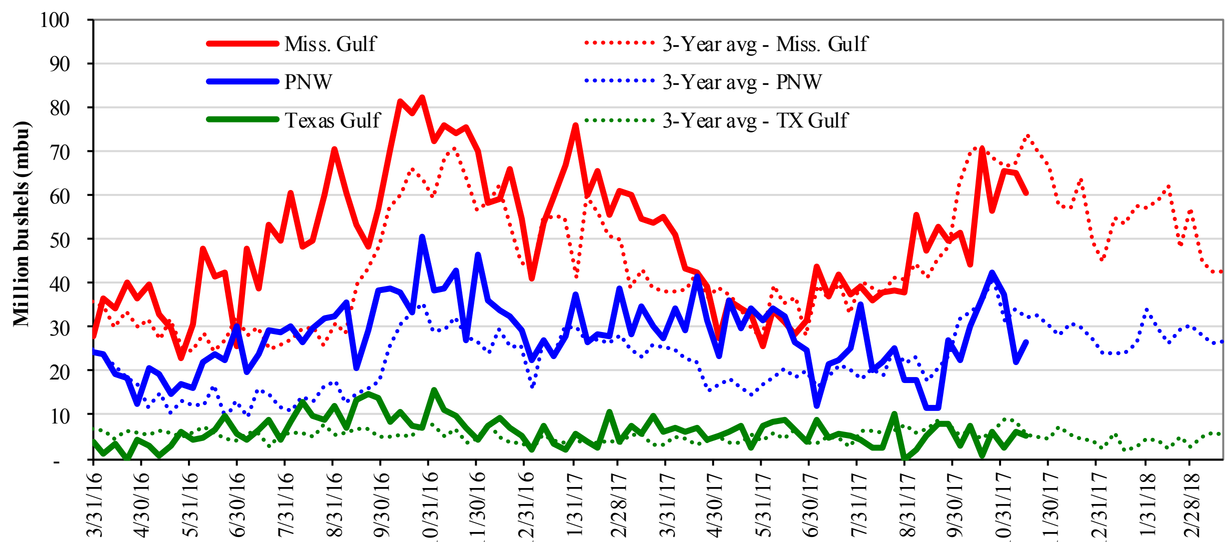
U.S. grain inspected for export (wheat, corn, and soybeans)



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 11/16/17 inspections (mbu):	
Mississippi Gulf:	60.3
PNW:	26.5
Texas Gulf:	5.3

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last Week:	down 7	down 15	down 8	up 20
Last Year (same week):	down 18	down 46	down 22	down 38
3-yr avg. (4-wk. mov. Avg):	down 12	down 27	down 14	down 24

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

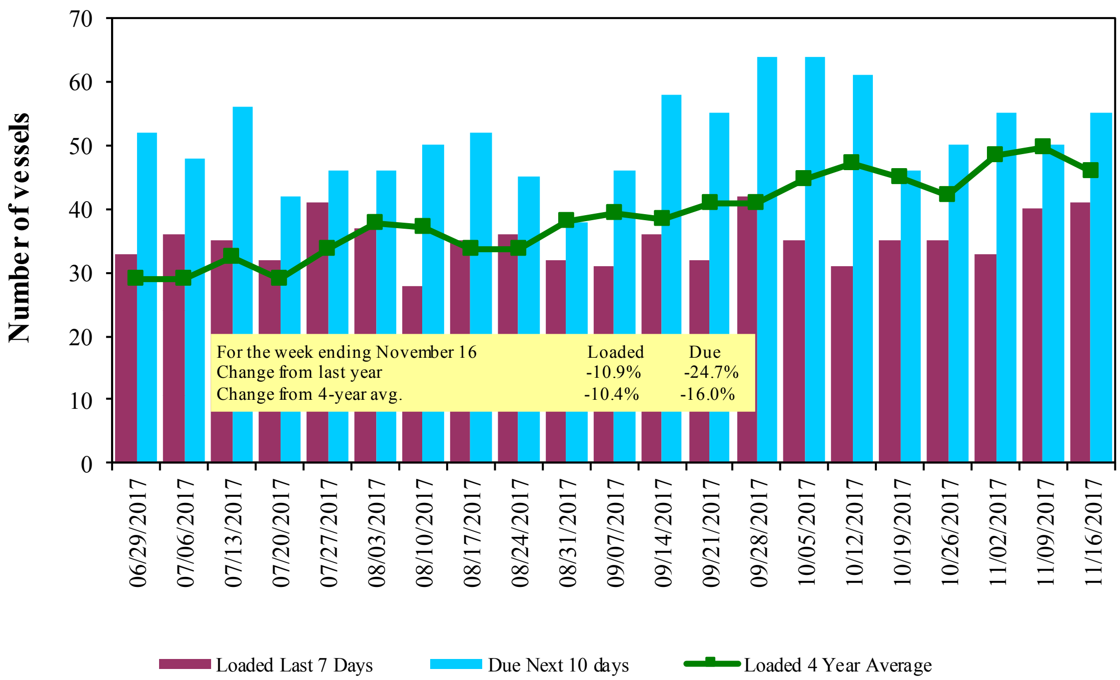
Ocean Transportation

Table 17
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
11/16/2017	50	41	55	12	n/a
11/9/2017	52	40	50	6	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

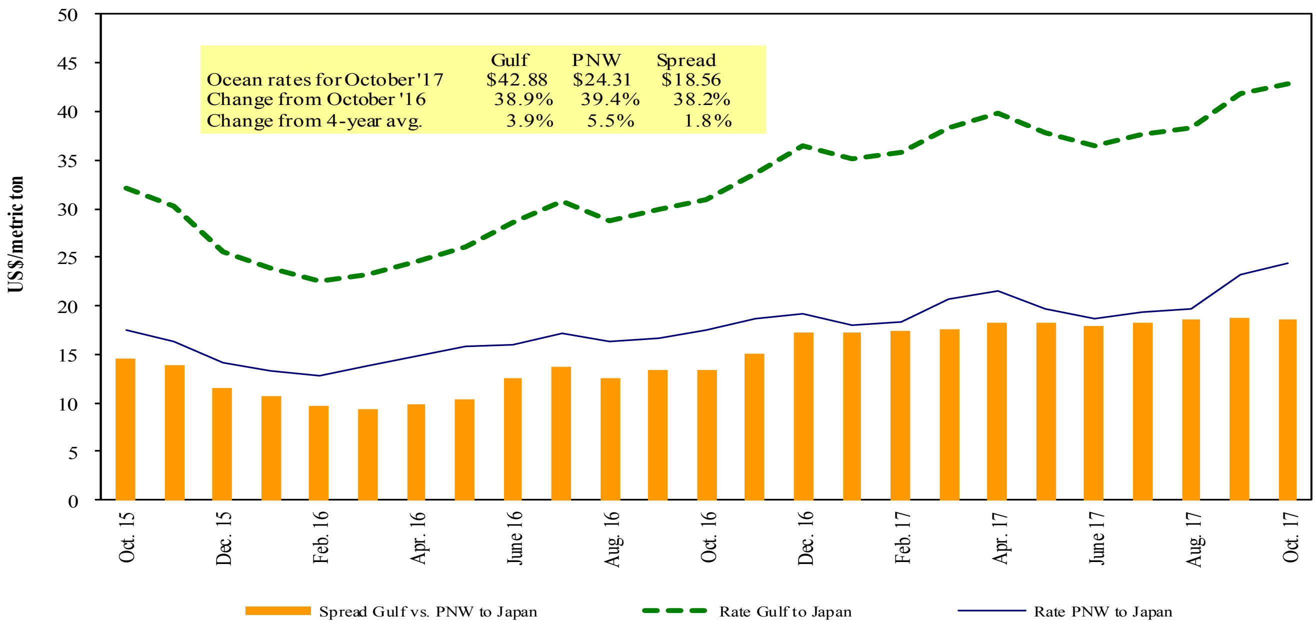
Figure 16
U.S. Gulf Vessel Loading Activity



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 11/18/2017

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US $/metric ton)
U.S. Gulf	Gulf	Heavy Grain	Nov 20/30	66,000	41.25
U.S. Gulf	Gulf	Heavy Grain	Nov 20/30	66,000	42.00
U.S. Gulf	Gulf	Heavy Grain	Nov 15/25	65,000	43.85
U.S. Gulf	China	Heavy Grain	Nov 10/20	66,000	43.75
U.S. Gulf	China	Heavy Grain	Nov 10/15	66,000	40.25
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	41.75
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	41.25
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	41.50
U.S. Gulf	China	Heavy Grain	Oct 23/30	60,000	40.50
U.S. Gulf	China	Heavy Grain	Oct 15/30	66,000	42.50
U.S. Gulf	China	Heavy Grain	Oct 10/20	66,000	41.00
U.S. Gulf	Dakar	Wheat	Nov 20/30	7,500	73.89*
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	Dec 1/10	60,000	31.90
Brazil	China	Heavy Grain	Nov 20/30	60,000	33.75
Brazil	China	Heavy Grain	Nov 1/10	60,000	31.90
Brazil	China	Heavy Grain	Oct 25/Nov 10	60,000	32.50
Brazil	S. Korea	Heavy Grain	Nov 22/29	63,000	33.25

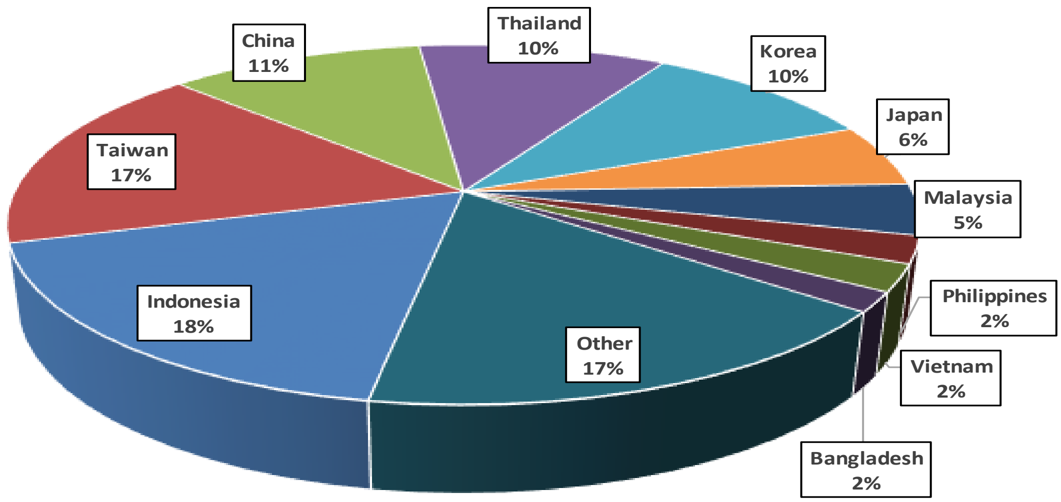
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option

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

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

In 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.

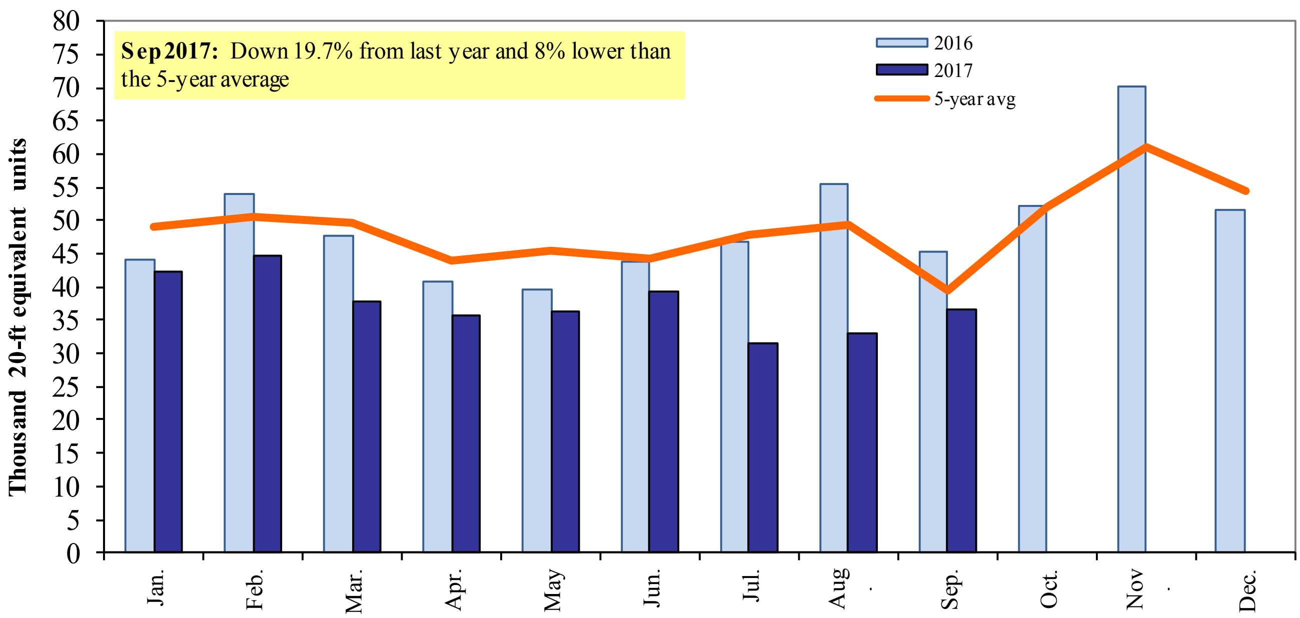
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-September 2017



Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

Figure 19
Monthly Shipments of Containerized Grain to Asia



Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data.

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 110220, 110290, 120100, 120810, 230210, 230310, 230330, and 230990.

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