United States Department of Agriculture

Grain Transportation Report

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

Contact Us

September 27, 2018

Contents

The next release is October 4, 2018

WEEKLY HIGHLIGHTS

U.S. Army Corps of Engineers to get $7 billion in FY 2019

On September 21, 2018, the President signed into law: H.R. 5895, the "Energy and Water, Legislative Branch, and Military Construction and Veterans Affairs Appropriations Act, 2019," which provides full-year funding through September 30, 2019, for a combination of appropriation bills. Of particular interest to grain transportation interests is the increased funding for the U.S. Army Corps of Engineers (Corps) of $6.99 billion for FY 2019. Trade media has reported this level of funding includes full work plan allocations for five construction projects, of which the Chickamauga Lock and Dam on the Tennessee River will receive 15 percent from the Inland Waterway Trust Fund (IWTF) and 85 percent from Federal funding. The remaining four projects, which have not yet been specifically identified, will be funded through a 50 percent share from the IWTF and a 50 percent Federal share.

Grain Inspections Up for Second Consecutive Week

For the week ending September 20, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.40 million metric tons (mmt), up 5 percent from the previous week, up 2 percent from last year, and 5 percent above the 3-year average. Total corn inspections continued to rise, increasing 22 percent from the previous week. Year-to-date inspections of corn are up 19 percent from last year, with increased shipments to Asia, Europe, and Africa. Total inspections of wheat were unchanged from the previous week, while soybean inspections decreased 12 percent. Grain inspections were up 9 percent from the previous week in the Mississippi Gulf and up 4 percent in the Pacific Northwest.

Union Pacific Implements New Operating Plan

Last week, Union Pacific Railroad (UP) announced it will implement a new operating plan on October 1 that applies "precision scheduled railroading" principles. Termed "Unified Plan 2020," the plan includes shifting the focus from moving trains to moving cars, minimizing car dwell, and improving the utilization of crews and rail assets. When announcing the plan, UP said it intends to communicate thoroughly with customers. UP has also agreed to have weekly update calls with the Surface Transportation Board to keep it fully informed of operating changes and impacts to customers. According to the announcement, Unified Plan 2020 will be rolled out in phases across the entire network, beginning first along UP's eastern North/South corridor (between Wisconsin and Texas).

Snapshots by Sector

Export Sales

For the week ending September 13, **unshipped balances** of wheat, corn, and soybeans totaled 35.5 mmt, up 12 percent from the same time last year. Net weekly **wheat export sales** were .468 mmt, up 21 percent from the previous week. Net **corn export sales** were 1.38 mmt, up 79 percent from the previous week. Net **soybean export sales** were .918 mmt, up 32 percent from the past week.

Rail

U.S. Class I railroads originated 21,270 **grain carloads** for the week ending September 15, up 6 percent from the previous week, 2 percent from last year, and 4 percent from the 3-year average.

Average October shuttle **secondary railcar** bids/offers per car were $33 above tariff for the week ending September 20, up $33 from last week, and $479 lower than last year. Average non-shuttle secondary railcar bids/offers per car were $275 above tariff, up $105 from last week. There were no non-shuttle bids/offers this week last year.

Barge

For the week ending September 22, **barge grain movements** totaled 668,650 tons, 24 percent higher than the previous week and up 95 percent from the same period last year.

For the week ending September 22, 433 grain barges **moved down river**, 76 barges more than the previous week. There were 746 grain barges **unloaded in New Orleans**, 4 percent lower than the previous week.

Ocean

For the week ending September 20, 37 **ocean-going grain vessels** were loaded in the Gulf, 16 percent more than the same period last year. Sixty-one vessels are expected to be loaded within the next 10 days, 11 percent more than the same period last year.

For the week ending September 20 the ocean freight rate for shipping bulk grain, from the Gulf to Japan, was $46.75 per metric ton, 1 percent more than the previous week. The cost of shipping, from the PNW to Japan, was $25.50 per metric ton, 2 percent more than the previous week.

Fuel

For the week ending September 24, the **U.S. average diesel fuel price** increased 0.3 cents, from the previous week, to $3.271 per gallon, 48.3 cents above the same week last year.

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Web: **http://dx.doi.org/10.9752/TS056.09-27-2018**

Feature Article/Calendar

Sept. 30 - Oct. 2	IAOM - Southeast Asia Region Conference	Pasay City, Manila	https://www.iaom.info/southeastasia/
Oct. 18-21	North American Millers' Assocation Annual Meeting	Sea Island, GA	http://www.namamillers.org/meetings/
Oct. 22-24	Inland Distribution Conference	Oak Brook, IL	https://events.joc.com/inland-2018
Oct. 22-24	Export Exchange 2018	Minneapolis, MN	http://www.exportexchange.org/
Oct. 22-25	JOC Inalnd Distribution Conference	Oak Broook, IL	https://events.joc.com/inland-2018
Oct. 22-25	IAOM - Mideast & Africa Region Conference/Expo	Nairobi, Kenya	968-2471-2338
Oct. 27-31	American Trucking Assoication Management Conference & Exhibition	Austin, TX	https://mce.trucking.org/
Oct. 30 - Nov. 2	Wheat Industry Fall Conference	Tampa Bay, FL	https://www.wheatworld.org/newsroom/events/
Nov. 4-6	Whole Grains Council Conference: Global Traditions & Trends	Seattle, WA	https://wholegrainscouncil.org/get-involved/attend-our-conference
Nov. 6-8	Oklahoma AgriBusiness Expo	Norman, OK	580-233-9516
Nov. 13	AgTC Workshop	Riverside, MO	https://agtrans.org/events/
Nov. 14	AgTC Workshop	Atlanta, GA	https://agtrans.org/events/
Nov. 13-15	Global Grain Geneva Conference	Geneva, Switzerland	http://www.globalgrainevents.com/geneva/details.html
Nov. 14-15	Kansas Agri Business Expo	Wichita, KS	http://www.ksabe.org/
Nov. 14-16	Waterways Council Annual Meeting and 15th Annual Symposium	Chicago, IL	http://waterwayscouncil.org/
Nov. 29	Montana Grain growers Association Annual Convention	Great Falls, MT	https://mgga.org/events/annual-convention/registration-2/
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/
Jan. 14-16, 2019	Micigam Agribusiness Association	Lansing, MI	https://miagbiz.org/
Jan. 16-17	South Dakota Ag Expo Conference	Sioux Falls, SD	https://www.agexpo-sd.org/
Jan. 20-22	North Dakota Grain Deales Association Covention	Fargo, ND	701-235-4184
Jan. 24-25	TEGMA 2019 Annual Meeting	Scottsdale, AZ	http://www.tegma.org/meetings
Jan. 30- Feb 1	Ohio Agribusiness Association Convention	Columbus, OH	614-326-7520
Feb. 11-16	Wheat Industry Winter Conference	Washington, DC	https://www.wheatworld.org/newsroom/events/
Feb. 17-19	Grain & Feed Association of Illinois Meeting	Schaumberg, IL	217-787-0810
Feb. 12-14	2019 Waterways Council Washington Meeting	Washington, DC	http://waterwayscouncil.org/calendar/
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 Meeting	Bloommington, MN	651-454-8212
March 17-19	NGFA 123rd Annual Convention	Amelia Island, FL	https://www.ngfa.org/upcoming-events/

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit Train	Shuttle		Gulf	Pacific
09/26/18	220	293	218	268	209	181
09/19/18	219	293	214	288	207	177

[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	9/21/2018	9/14/2018
Corn	IL--Gulf	-0.78	-0.81
Corn	NE--Gulf	-0.77	-0.81
Soybean	IA--Gulf	-0.98	-0.96
HRW	KS--Gulf	-1.45	-1.50
HRS	ND--Portland	-1.98	-1.89

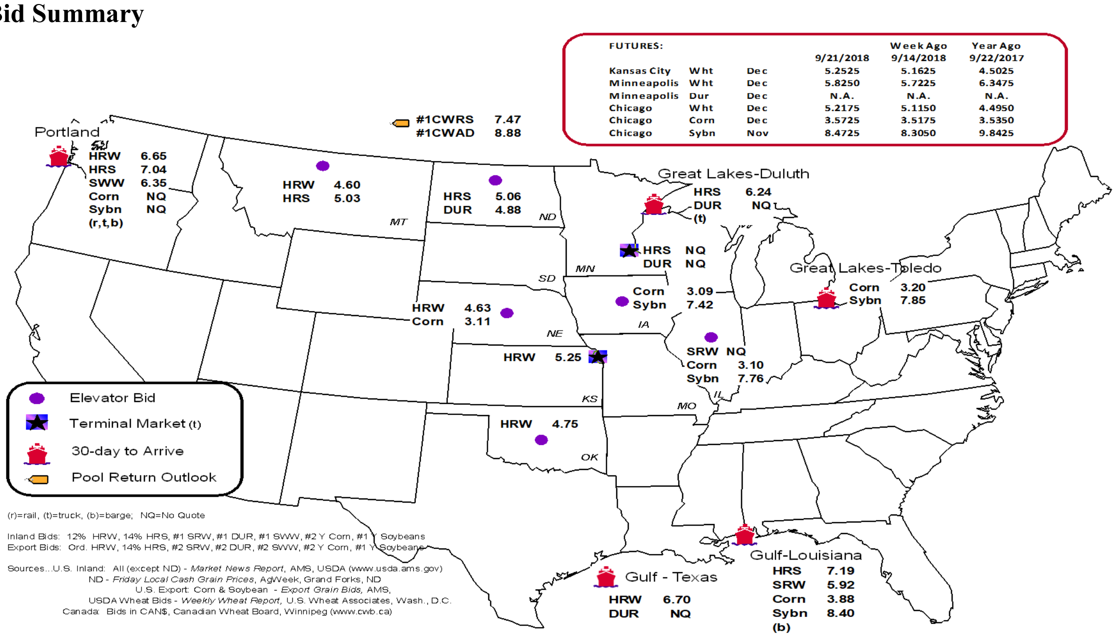
Note: nq = no quote; n/a = not available

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]
09/19/2018[p]	438	255	5,430	174	6,297	9/15/2018	2,417
09/12/2018[r]	573	605	3,633	253	5,064	9/8/2018	2,480
2018 YTD[r]	16,046	37,864	243,458	14,808	312,176	2018 YTD	88,288
2017 YTD[r]	18,450	62,243	203,625	13,693	298,011	2017 YTD	88,494
2018 YTD as % of 2017 YTD	87	61	120	108	105	% change YTD	100
Last 4 weeks as % of 2017[2]	158	49	197	124	152	Last 4wks % 2017	99
Last 4 weeks as % of 4-year avg.[2]	157	37	137	107	112	Last 4wks % 4 yr	120
Total 2017	28,796	76,545	289,178	21,999	416,518	Total 2017	119,661
Total 2016	36,925	88,035	299,604	29,007	453,571	Total 2016	92,982

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2017 and prior 4-year average.

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

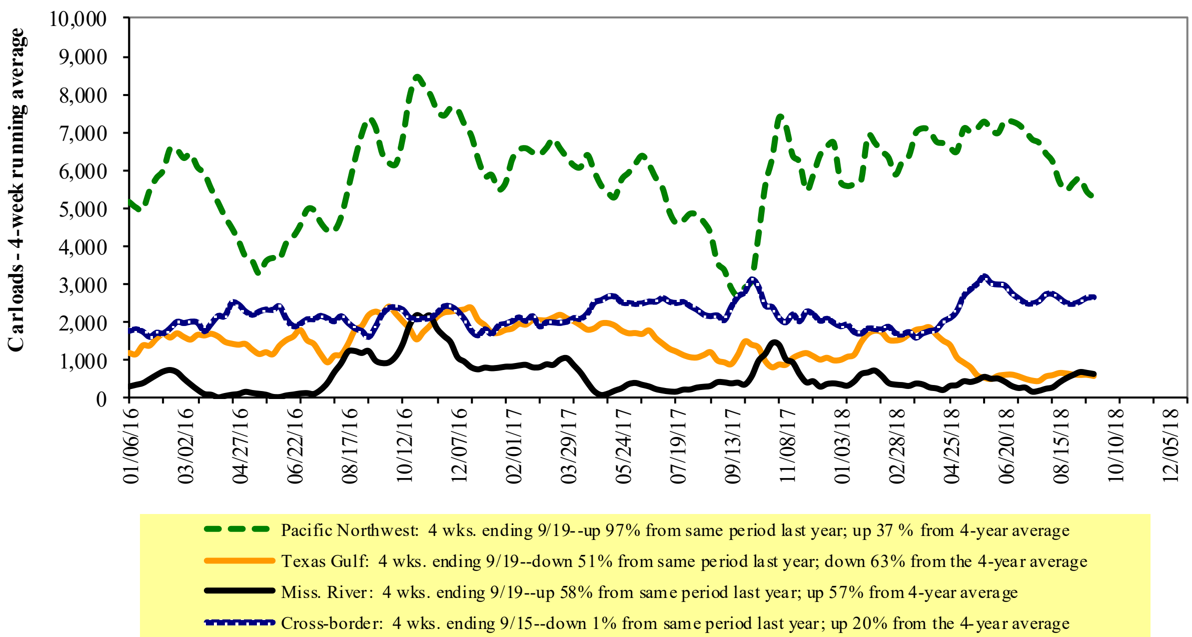
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 24 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

For the week ending: 9/15/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,253	2,892	12,144	578	4,403	21,270	4,608	4,970
This week last year	1,394	2,220	10,742	1,268	5,233	20,857	3,398	5,188
2018 YTD	70,120	95,109	459,062	34,495	193,442	852,228	143,754	172,255
2017 YTD	60,598	101,560	409,132	34,838	210,350	816,478	138,647	168,294
2018 YTD as % of 2017 YTD	116	94	112	99	92	104	104	102
Last 4 weeks as % of 2017*	121	100	122	70	107	113	136	99
Last 4 weeks as % of 3-yr avg.**	117	106	113	80	97	107	144	103
Total 2017	89,465	142,750	578,964	50,223	289,574	1,150,976	198,414	244,766

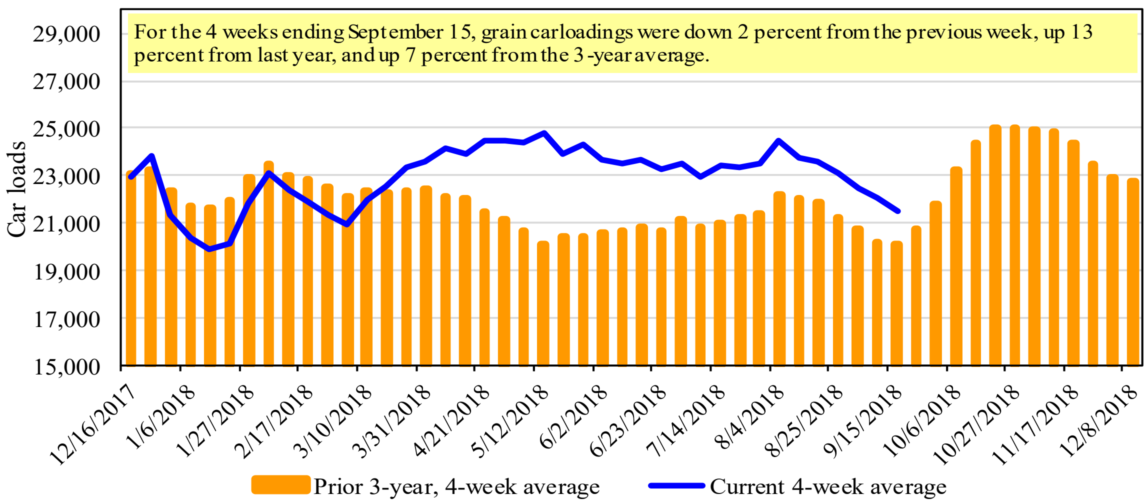
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 9/20/2018		Oct-18	Oct-17	Nov-18	Nov-17	Dec-18	Dec-17	Jan-19	Jan-18
		Delivery period							
BNSF[3]	COT grain units	0	no bids	0	0	0	no bids	no bids	no bids
	COT grain single-car[5]	0	0	1	0	2	0	0	0
UP[4]	GCAS/Region 1	no offer	10	no offer	no bids	no offer	no bids	n/a	n/a
	GCAS/Region 2	no offer	44	no offer	no bids	no offer	no bids	n/a	n/a

[1]Auction offerings are for single-car and unit train shipments only.

[2]Average premium/discount to tariff, last auction

[3]BNSF - COT = Certificate of Transportation; north grain and south grain bids were combined effective the week ending 6/24/06.

[4]UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

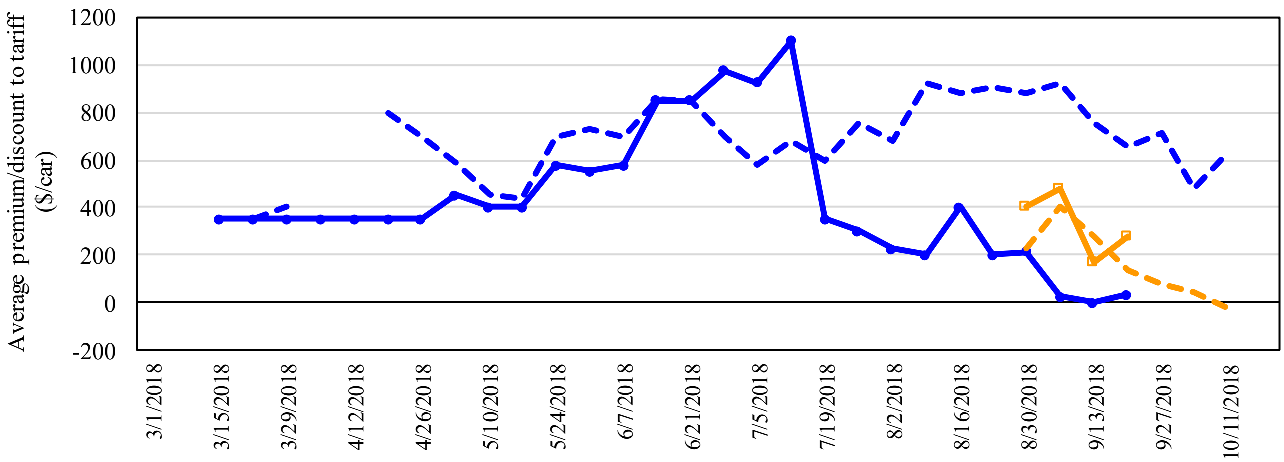
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

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

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

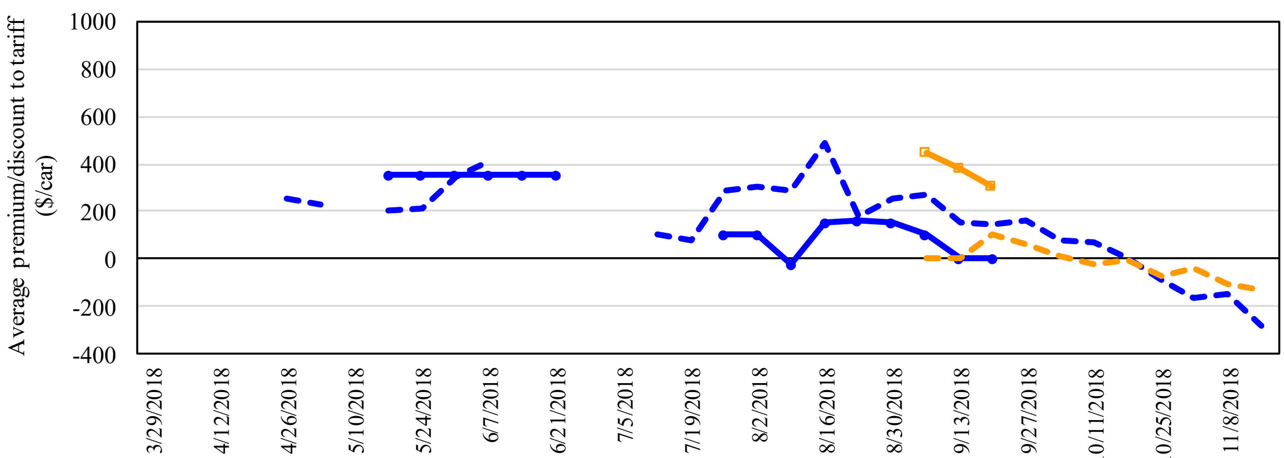


9/20/2018	BNSF	UP
Non-Shuttle	n/a	$275
Shuttle	$33	n/a

Average Non-shuttle bids/offers rose $105 this week, and are $200 below the peak.
Average Shuttle bids/offers rose $33 this week and are $1,067 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 November 2018, Secondary Market



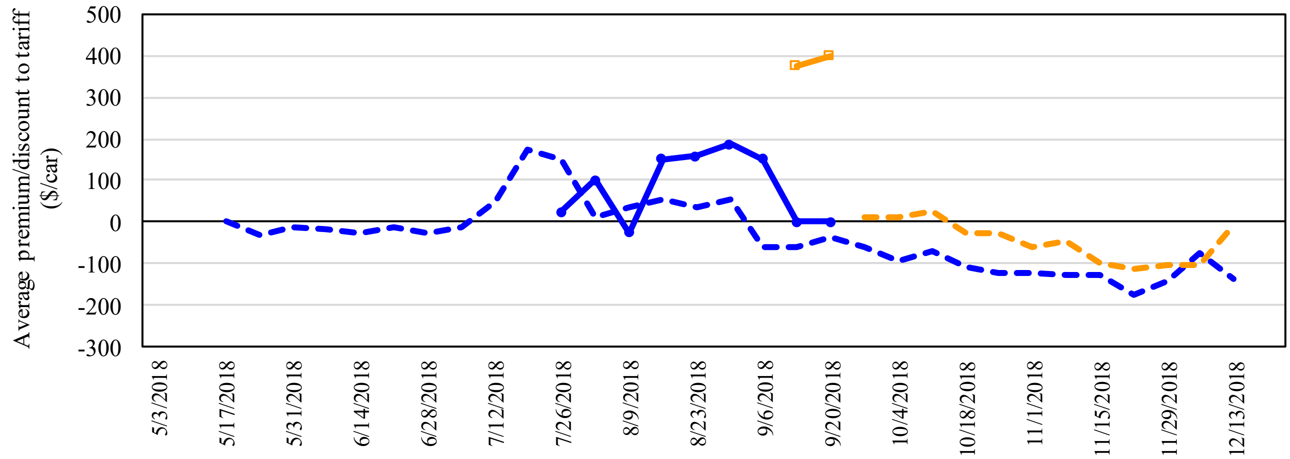
9/20/2018	BNSF	UP
Non-Shuttle	n/a	$300
Shuttle	n/a	$0

Average Non-shuttle bids/offers fell $75 this week, and are $150 below the peak.
Average Shuttle bids/offers are unchanged 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

Figure 6

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



9/20/2018	BNSF	UP
Non-Shuttle	n/a	$400
Shuttle	$0	$0

Average Non-shuttle bids/offers rose $25 this week, and are at the peak.
Average Shuttle bids/offers are unchanged this week and are $188 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: 9/20/2018	Delivery period					
		Oct-18	**Nov-18**	**Dec-18**	**Jan-19**	**Feb-19**	**Mar-19**
Non-shuttle	**BNSF-GF**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2017	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**275**	**300**	**400**	**n/a**	**n/a**	**n/a**
	Change from last week	(38)	(75)	25	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**	**33**	**n/a**	**0**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	n/a	0	n/a	n/a	n/a
	Change from same week 2017	(392)	n/a	50	n/a	n/a	n/a
	UP-Pool	**n/a**	**0**	**0**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	0	0	n/a	n/a	n/a
	Change from same week 2017	n/a	0	100	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]

September, 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	$116	$40.71	$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	$205	$47.12	$1.28	3
	Sioux Falls, SD	Galveston-Houston, TX	$6,911	$0	$68.63	$1.87	2
	Northwest KS	Galveston-Houston, TX	$4,816	$224	$50.05	$1.36	3
	Amarillo, TX	Los Angeles, CA	$5,121	$312	$53.95	$1.47	6
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,931	$231	$41.33	$1.05	11
	Toledo, OH	Raleigh, NC	$6,344	$0	$63.00	$1.60	5
	Des Moines, IA	Davenport, IA	$2,258	$49	$22.91	$0.58	1
	Indianapolis, IN	Atlanta, GA	$5,446	$0	$54.08	$1.37	5
	Indianapolis, IN	Knoxville, TN	$4,540	$0	$45.08	$1.15	5
	Des Moines, IA	Little Rock, AR	$3,609	$144	$37.27	$0.95	5
	Des Moines, IA	Los Angeles, CA	$5,327	$419	$57.06	$1.45	7
Soybeans	Minneapolis, MN	New Orleans, LA	$4,131	$238	$43.39	$1.18	19
	Toledo, OH	Huntsville, AL	$5,287	$0	$52.50	$1.43	5
	Indianapolis, IN	Raleigh, NC	$6,460	$0	$64.15	$1.75	5
	Indianapolis, IN	Huntsville, AL	$4,764	$0	$47.31	$1.29	5
	Champaign-Urbana, IL	New Orleans, LA	$4,745	$231	$49.42	$1.34	9
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$4,078	$0	$40.50	$1.10	3
	Wichita, KS	Galveston-Houston, TX	$4,296	$0	$42.66	$1.16	3
	Chicago, IL	Albany, NY	$5,663	$0	$56.24	$1.53	3
	Grand Forks, ND	Portland, OR	$5,736	$0	$56.96	$1.55	2
	Grand Forks, ND	Galveston-Houston, TX	$6,056	$0	$60.14	$1.64	2
	Northwest KS	Portland, OR	$5,912	$368	$62.36	$1.70	6
Corn	Minneapolis, MN	Portland, OR	$5,000	$0	$49.65	$1.26	0
	Sioux Falls, SD	Tacoma, WA	$4,960	$0	$49.26	$1.25	0
	Champaign-Urbana, IL	New Orleans, LA	$3,731	$231	$39.35	$1.00	11
	Lincoln, NE	Galveston-Houston, TX	$3,700	$0	$36.74	$0.93	0
	Des Moines, IA	Amarillo, TX	$3,970	$181	$41.22	$1.05	5
	Minneapolis, MN	Tacoma, WA	$5,000	$0	$49.65	$1.26	0
	Council Bluffs, IA	Stockton, CA	$4,820	$0	$47.86	$1.22	2
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,750	$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	$267	$50.07	$1.36	9
	Toledo, OH	Huntsville, AL	$4,352	$0	$43.22	$1.18	3
	Grand Island, NE	Portland, OR	$5,710	$377	$60.44	$1.65	9

[1]A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements.

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

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

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

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

Table 8

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

Date: September, 2018

Commodity	Origin state	Destination region	Tariff rate/car[1]	Fuel surcharge per car[2]	Tariff plus surcharge per: metric ton[3]	Tariff plus surcharge per: bushel[3]	Percent change[4] Y/Y
Wheat	MT	Chihuahua, CI	$7,284	$0	$74.43	$2.02	-2
	OK	Cuautitlan, EM	$6,743	$160	$70.54	$1.92	3
	KS	Guadalajara, JA	$7,371	$396	$79.36	$2.16	3
	TX	Salinas Victoria, NL	$4,292	$98	$44.86	$1.22	1
Corn	IA	Guadalajara, JA	$8,313	$358	$88.59	$2.25	3
	SD	Celaya, GJ	$7,700	$0	$78.68	$2.00	2
	NE	Queretaro, QA	$8,013	$337	$85.32	$2.17	4
	SD	Salinas Victoria, NL	$6,743	$0	$68.90	$1.75	2
	MO	Tlalnepantla, EM	$7,379	$329	$78.76	$2.00	4
	SD	Torreon, CU	$7,300	$0	$74.59	$1.89	2
Soybeans	MO	Bojay (Tula), HG	$8,209	$333	$87.28	$2.37	-3
	NE	Guadalajara, JA	$8,767	$363	$93.29	$2.54	0
	IA	El Castillo, JA	$9,110	$0	$93.08	$2.53	2
	KS	Torreon, CU	$7,564	$267	$80.01	$2.18	3
Sorghum	NE	Celaya, GJ	$7,345	$331	$78.43	$1.99	5
	KS	Queretaro, QA	$7,819	$200	$81.94	$2.08	4
	NE	Salinas Victoria, NL	$6,452	$161	$67.56	$1.71	5
	NE	Torreon, CU	$6,790	$257	$72.00	$1.83	5

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

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

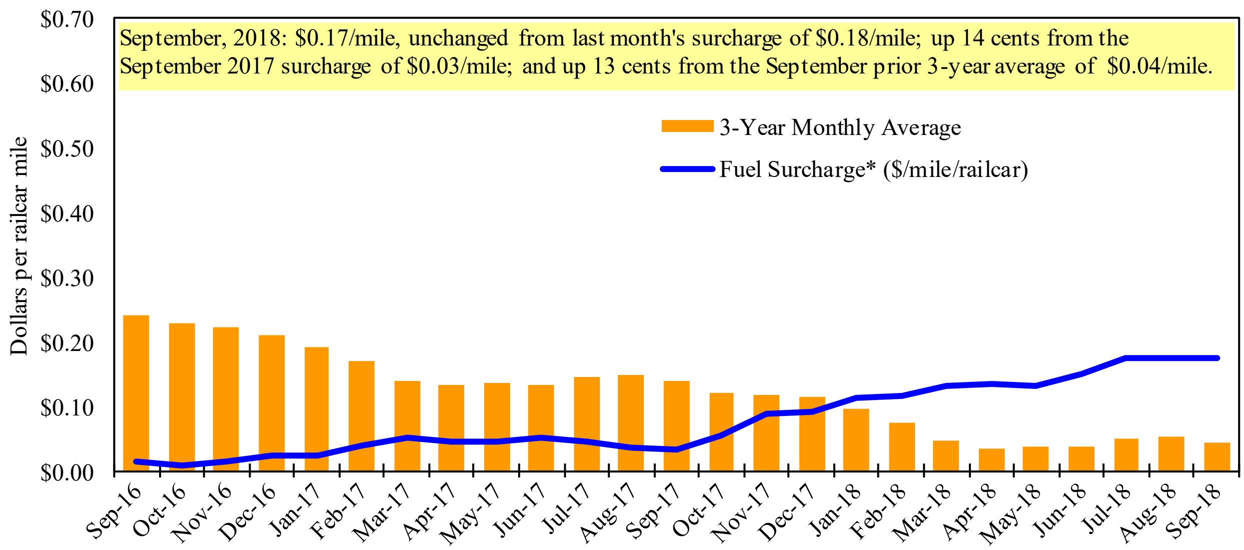
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average[1]

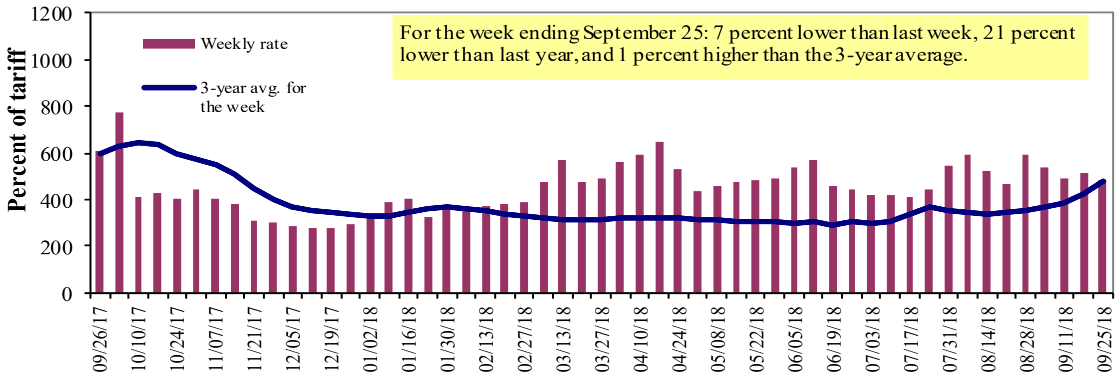


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.
Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

Barge Transportation

Figure 8

Illinois River Barge Freight Rate[1,2]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	9/25/2018	488	475	483	393	465	465	338
	9/18/2018	538	525	518	433	513	513	450
$/ton	9/25/2018	30.21	25.27	22.41	15.68	21.81	18.79	10.61
	9/18/2018	33.30	27.93	24.04	17.28	24.06	20.73	14.13
Current week % change from the same week:								
	Last year	-19	-17	-21	-23	-26	-26	-29
	3-year avg. [2]	-2	0	1	1	-4	-4	-9
Rate[1]	October	513	503	508	415	493	493	393
	December	-	-	395	313	350	375	288

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds;

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9
Benchmark tariff rates

Calculating barge rate per ton:
(Rate * 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map.

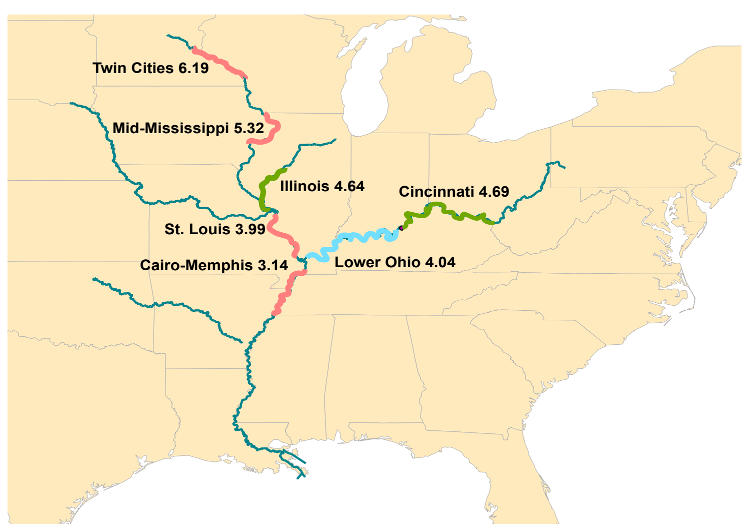
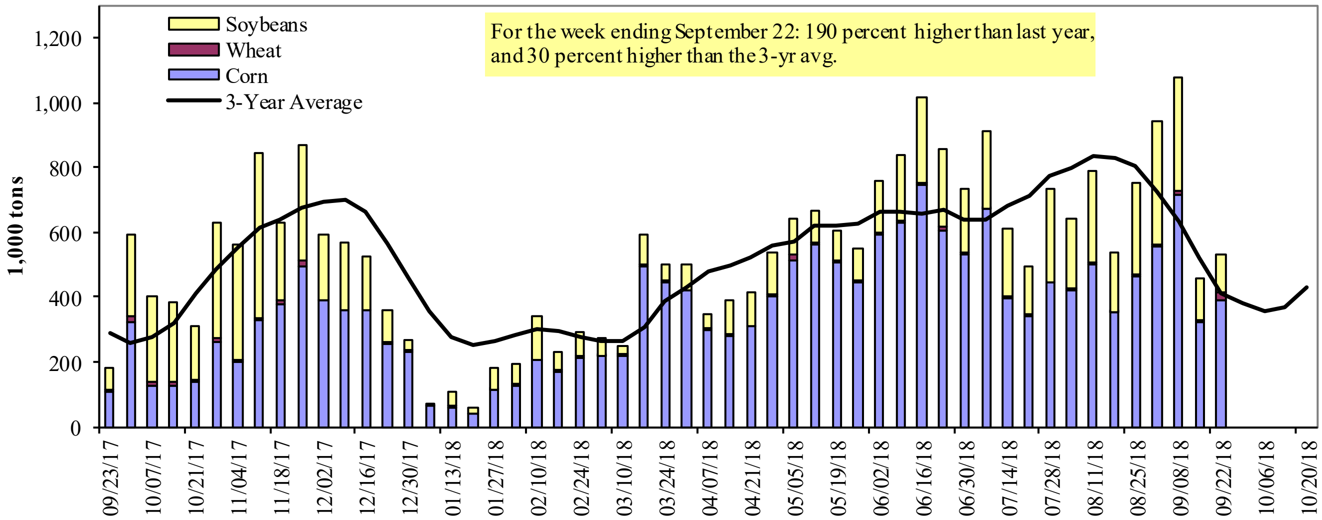


Figure 10

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



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

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

For the week ending 09/22/2018	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	133	10	31	0	173
Winfield, MO (L25)	257	17	92	0	366
Alton, IL (L26)	405	22	114	0	541
Granite City, IL (L27)	393	21	120	0	534
Illinois River (L8)	73	2	9	0	84
Ohio River (L52)	78	0	37	0	115
Arkansas River (L1)	1	6	13	0	20
Weekly total - 2018	472	26	170	0	669
Weekly total - 2017	124	58	158	3	343
2018 YTD[1]	18,170	1,372	9,093	88	28,723
2017 YTD	17,597	1,884	10,202	228	29,911
2018 as % of 2017 YTD	103	73	89	39	96
Last 4 weeks as % of 2017[2]	210	94	92	15	143
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.

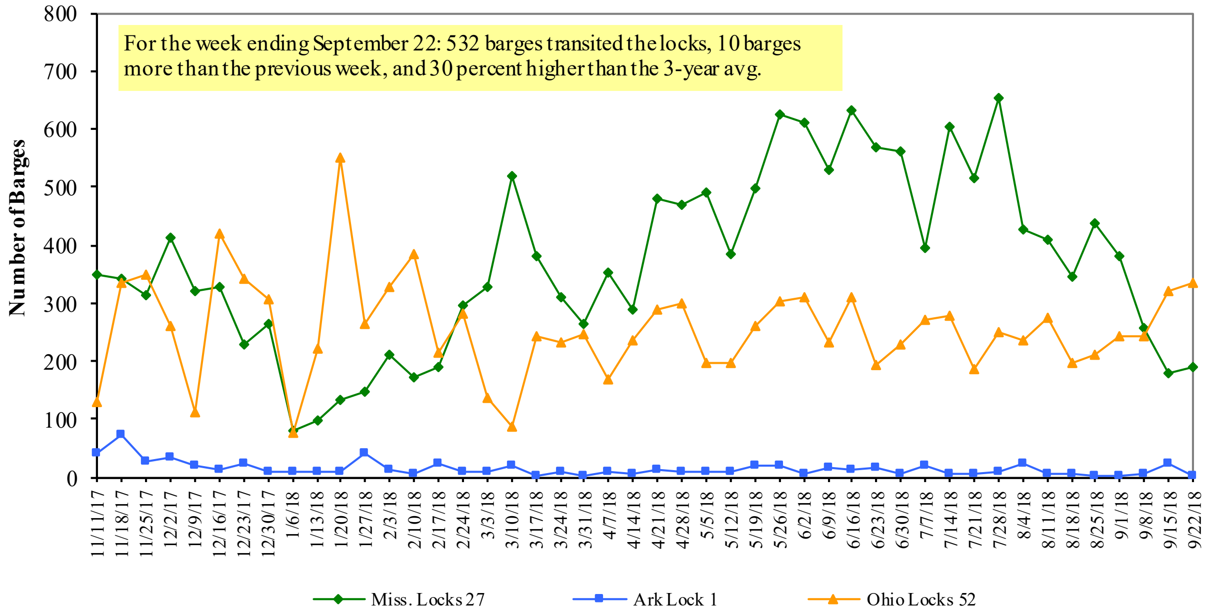
[2] As a percent of same period in 2017.

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

Source: U.S. Army Corps of Engineers

Figure 11

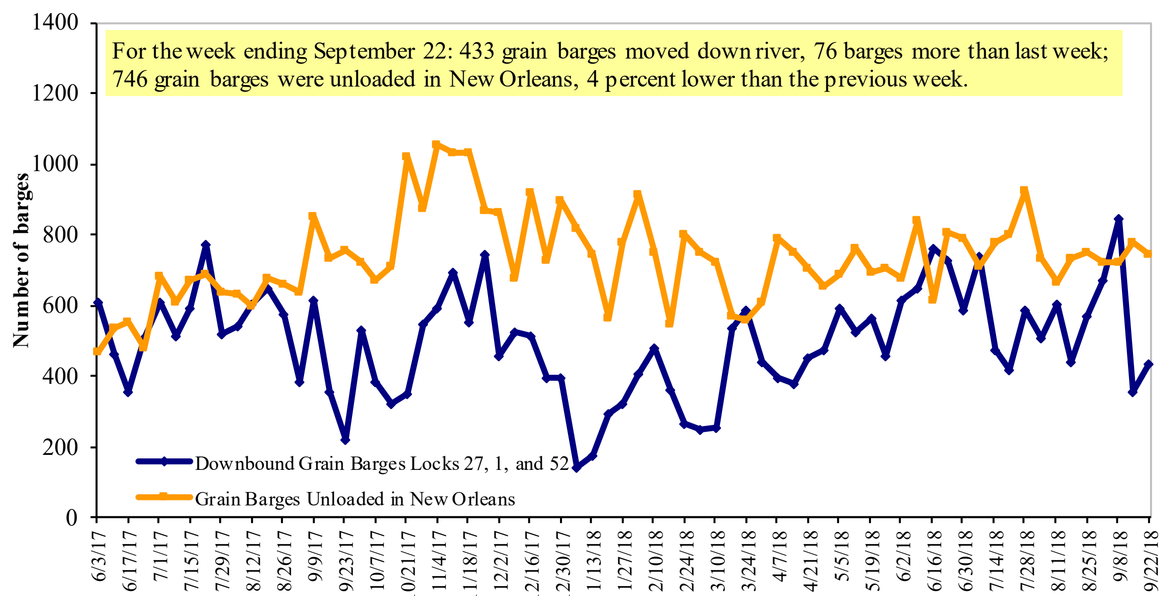
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 9/24/2018 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.254	0.002	0.443
	New England	3.270	0.003	0.508
	Central Atlantic	3.416	0.001	0.491
	Lower Atlantic	3.136	0.001	0.396
II	Midwest[2]	3.218	0.010	0.477
III	Gulf Coast[3]	3.052	-0.004	0.428
IV	Rocky Mountain	3.355	-0.008	0.523
V	West Coast	3.759	0.004	0.656
	West Coast less California	3.473	0.000	0.465
	California	3.986	0.007	0.806
Total	U.S.	3.271	0.003	0.483

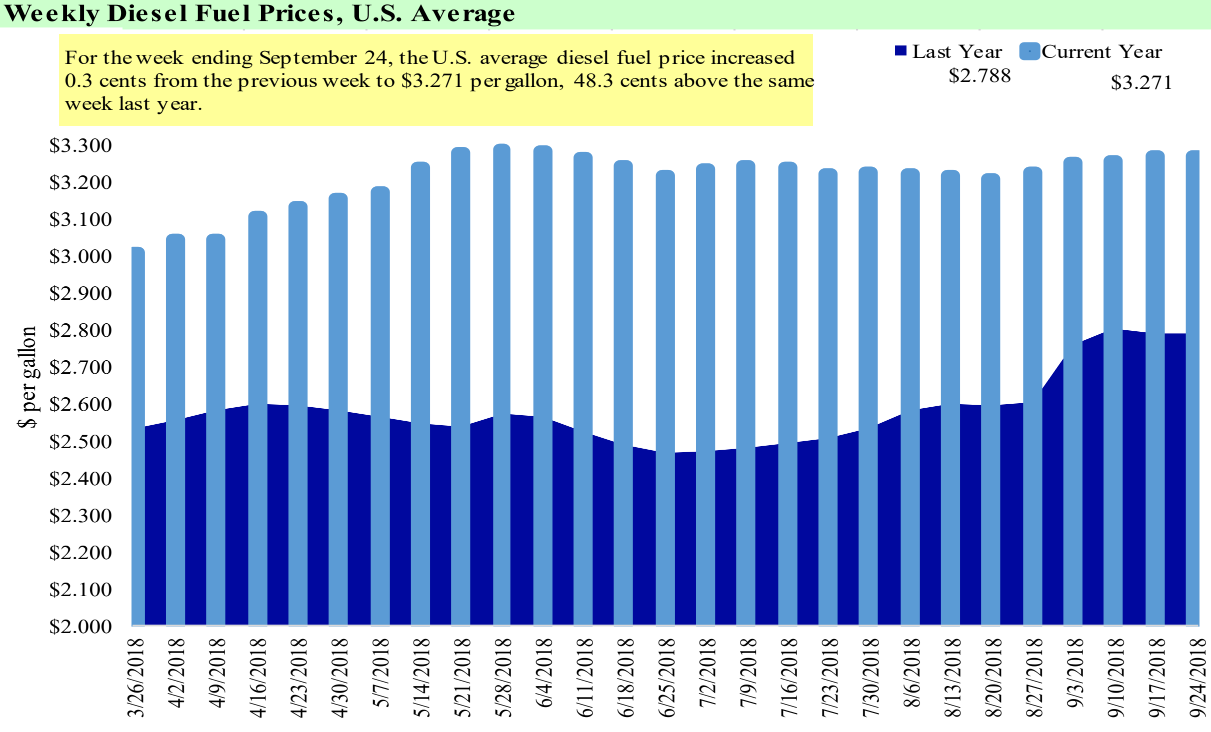
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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]									
9/13/2018	1,396	553	1,349	1,039	170	4,508	14,750	16,236	35,494
This week year ago	1,532	552	1,336	1,304	122	4,846	9,612	17,236	31,693
Cumulative exports-marketing year[2]									
2018/19 YTD	1,568	707	1,738	1,599	86	5,700	1,805	1,697	9,201
2017/18 YTD	3,360	737	2,196	1,815	129	8,237	1,418	2,096	11,752
YTD 2018/19 as % of 2017/18	47	96	79	88	67	69	127	81	78
Last 4 wks as % of same period 2017/18	91	100	99	73	143	91	96	56	73
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 9/13/2018	Total Commitments[2] 2018/19 Current MY	2017/18 Last MY	% change current MY from last MY	Exports[3] 3-year avg 2015-2017
	- 1,000 mt -			
Mexico	4,958	5,152	(4)	13,691
Japan	2,628	1,299	102	11,247
Korea	1,464	75	1,857	4,754
Colombia	432	712	(39)	4,678
Peru	379	520	(27)	2,975
Top 5 Importers	**9,860**	**7,758**	**27**	**37,344**
Total US corn export sales	**16,555**	**11,030**	**50**	**53,184**
% of Projected	27%	18%		
Change from prior week[2]	**1,384**	**527**		
Top 5 importers' share of U.S. corn export sales	60%	70%		70%
USDA forecast, September 2018	**61,069**	**61,705**	**(1)**	
Corn Use for Ethanol USDA forecast, September 2018	**143,510**	**142,240**	**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 9/13/2018	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	1,454	8,655	(83)	31,228
Mexico	2,220	1,052	111	3,716
Indonesia	636	415	53	2,250
Japan	567	566	0	2,145
Netherlands	136	0	0	2,209
Top 5 importers	**5,013**	**10,687**	**(53)**	**41,549**
Total US soybean export sales	**17,932**	**19,332**	**(7)**	**55,113**
% of Projected	32%	33%		
Change from prior week[2]	**918**	**2,338**		
Top 5 importers' share of U.S. soybean export sales	28%	55%		**75%**
USDA forecast, September 2018	**56,131**	**58,038**	**97**	

(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 9/13/2018	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	1,214	1,641	(26)	2,781
Japan	1,191	1,225	(3)	2,649
Philippines	1,601	1,559	3	2,441
Korea	851	1,026	(17)	1,257
Nigeria	470	693	(32)	1,254
Indonesia	357	611	(42)	1,076
Taiwan	508	568	(11)	1,066
China	0	532	(100)	944
Colombia	287	198	45	714
Thailand	514	440	17	618
Top 10 importers	**6,992**	**8,493**	(18)	**14,800**
Total US wheat export sales	**10,207**	**13,083**	**(22)**	**22,869**
% of Projected	37%	53%		
Change from prior week[2]	**468**	**307**		
Top 10 importers' share of U.S. wheat export sales	69%	65%		65%
USDA forecast, September 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 09/20/18	Previous Week*	Current Week as % of Previous	2018 YTD*	2017 YTD*	2018 YTD as % of 2017 YTD	Last 4-weeks as % of: Last Year	Last 4-weeks as % of: Prior 3-yr. avg.	2017 Total*
Pacific Northwest									
Wheat	178	282	63	9,386	11,600	81	93	81	14,805
Corn	438	235	187	15,862	10,047	158	506	141	10,928
Soybeans	0	74	0	6,400	5,690	112	116	218	13,246
Total	**615**	**591**	**104**	**31,648**	**27,337**	**116**	**155**	**117**	**38,978**
Mississippi Gulf									
Wheat	59	85	69	2,947	3,518	84	85	56	4,198
Corn	616	563	109	25,749	23,750	108	144	118	28,690
Soybeans	680	598	114	17,819	17,977	99	75	98	32,911
Total	**1,354**	**1,246**	**109**	**46,515**	**45,245**	**103**	**99**	**102**	**65,800**
Texas Gulf									
Wheat	72	0	n/a	2,311	5,159	45	55	37	6,354
Corn	30	25	123	621	591	105	201	53	733
Soybeans	0	0	n/a	69	0	n/a	0	0	292
Total	**103**	**25**	**418**	**3,000**	**5,750**	**52**	**70**	**41**	**7,379**
Interior									
Wheat	43	42	104	1,193	1,425	84	128	111	1,727
Corn	129	177	73	6,343	6,516	97	70	89	8,758
Soybeans	47	80	58	4,834	3,614	134	116	187	5,508
Total	**219**	**299**	**73**	**12,370**	**11,554**	**107**	**87**	**110**	**15,993**
Great Lakes									
Wheat	78	23	333	611	516	118	293	150	711
Corn	0	19	0	342	173	197	56	27	192
Soybeans	0	42	1	554	342	162	162	485	890
Total	**78**	**84**	**94**	**1,507**	**1,031**	**146**	**194**	**145**	**1,793**
Atlantic									
Wheat	1	0	n/a	68	44	154	27	4	46
Corn	28	0	n/a	103	14	762	395	100	32
Soybeans	4	33	11	1,434	1,001	143	80	102	2,001
Total	**33**	**33**	**99**	**1,606**	**1,059**	**152**	**114**	**84**	**2,079**
U.S. total from ports*									
Wheat	431	432	100	16,517	22,262	74	94	72	27,841
Corn	1,241	1,018	122	49,019	41,090	119	149	113	49,333
Soybeans	730	827	88	31,110	28,623	109	84	116	54,847
Total	**2,402**	**2,277**	**105**	**96,646**	**91,975**	**105**	**108**	**103**	**132,021**

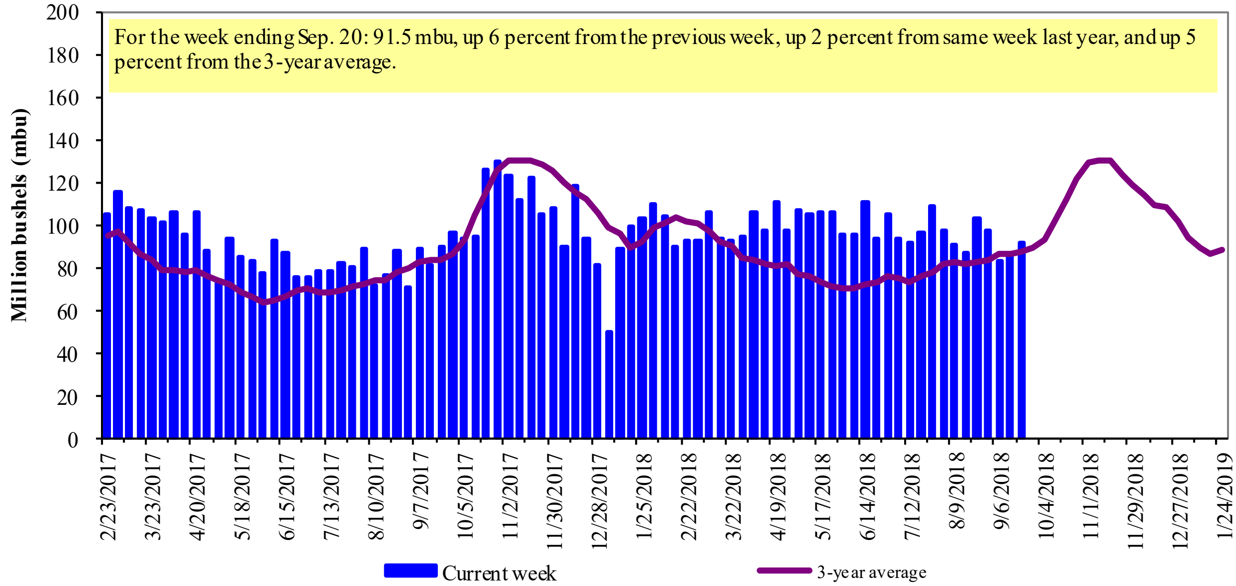
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

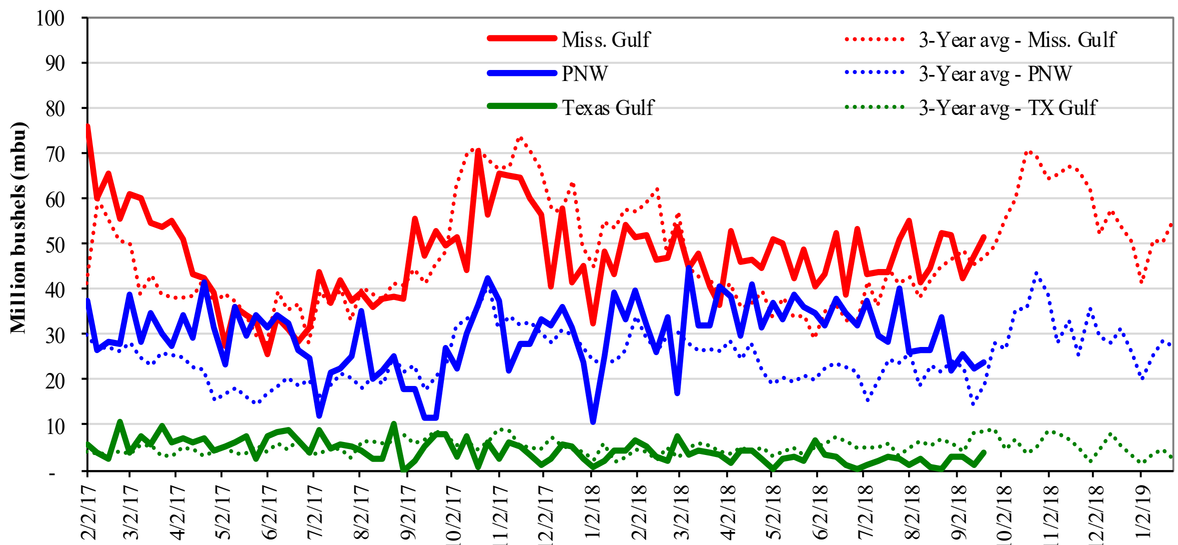
U.S. grain inspected for export (wheat, corn, and soybeans)



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 09/20/18 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Mississippi Gulf:	51.4	Last Week:	up 9	up 298	up 15	up 6
PNW:	23.8	Last Year (same week):	down 2	down 52	down 9	up 103
Texas Gulf:	3.9	3-yr avg. (4-wk. mov. Avg):	up 10	down 42	up 3	up 19

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

Ocean Transportation

Table 17

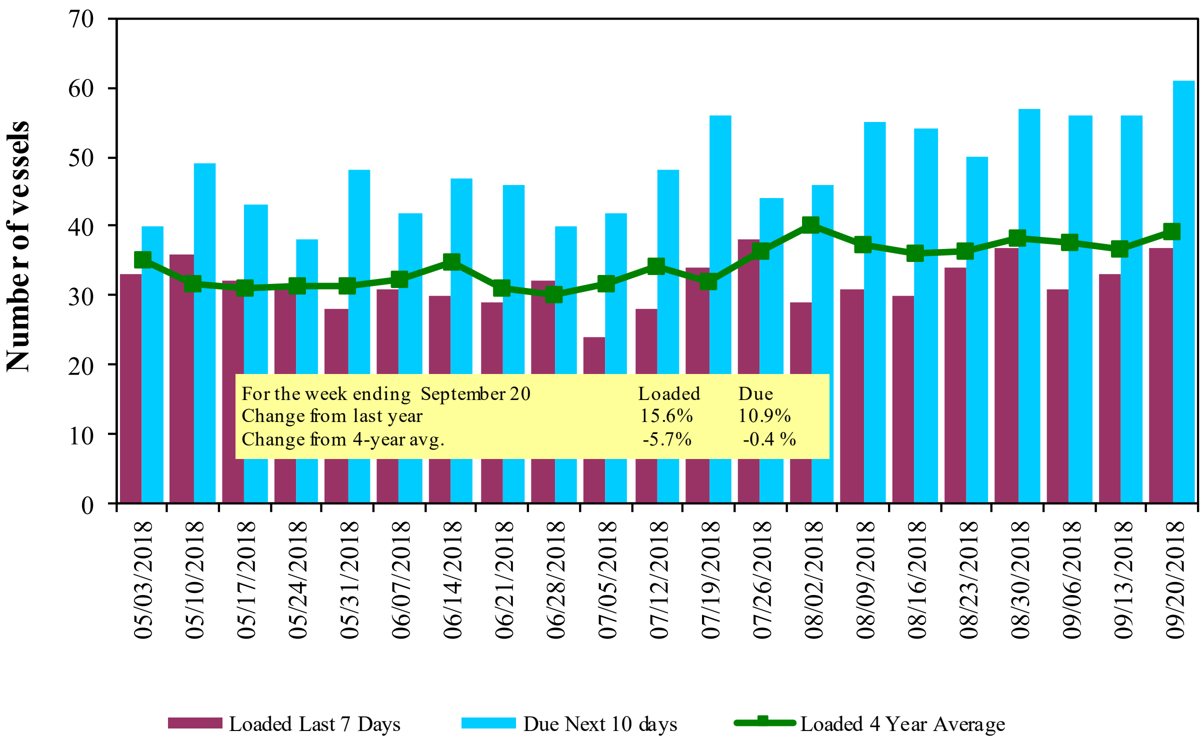
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
9/20/2018	29	37	61	12
9/13/2018	31	33	56	8
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg.	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

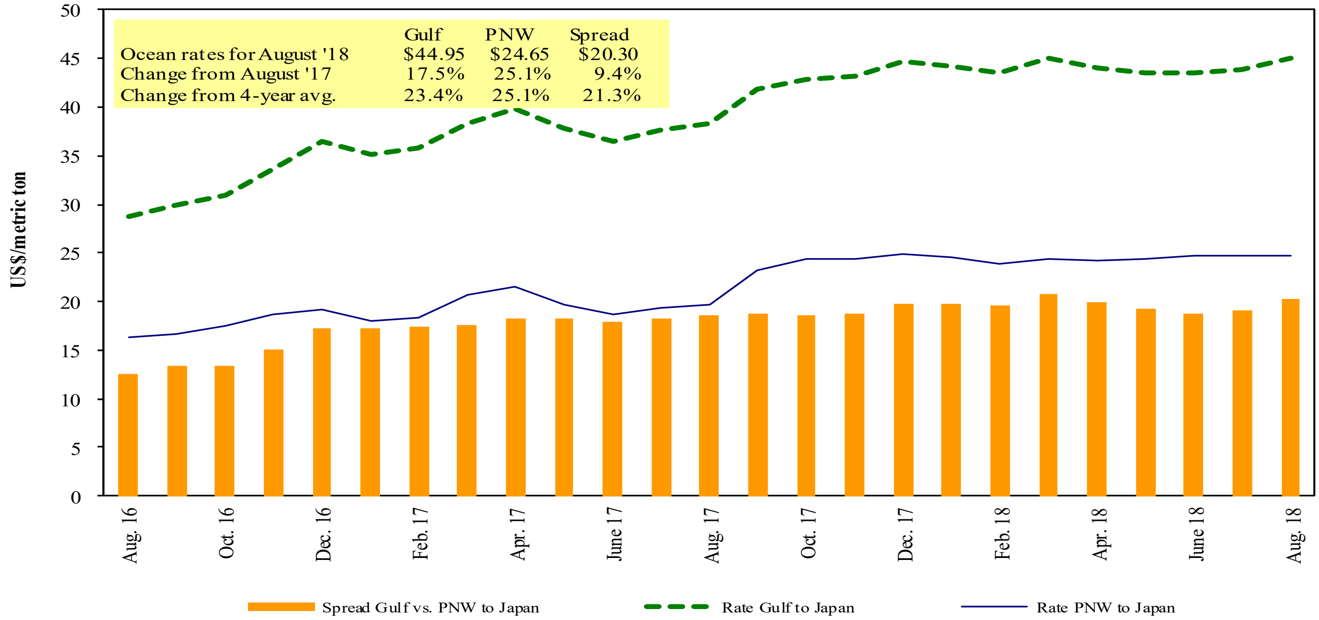
U.S. Gulf Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA
[1]U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 09/22/2018

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
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*
U.S. Gulf	Egypt	Heavy Grain	Jun 26/30	60,000	27.75
PNW	Taiwan	Heavy Grain	Sep 15/Oct 31	63,000	25.00
PNW	Yemen	Wheat	Aug 16	34,900	75.50*
PNW	Yemen	Wheat	Jul 26/Aug 9	27,500	83.70*
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	China	Heavy Grain	Jul 18/28	60,000	36.00
Brazil	China	Heavy Grain	Jun 22/30	60,000	35.00
Brazil	China	Heavy Grain	Jun 22/30	60,000	33.75
Brazil	Malaysia	Heavy Grain	Aug 17/24	65,000	31.00

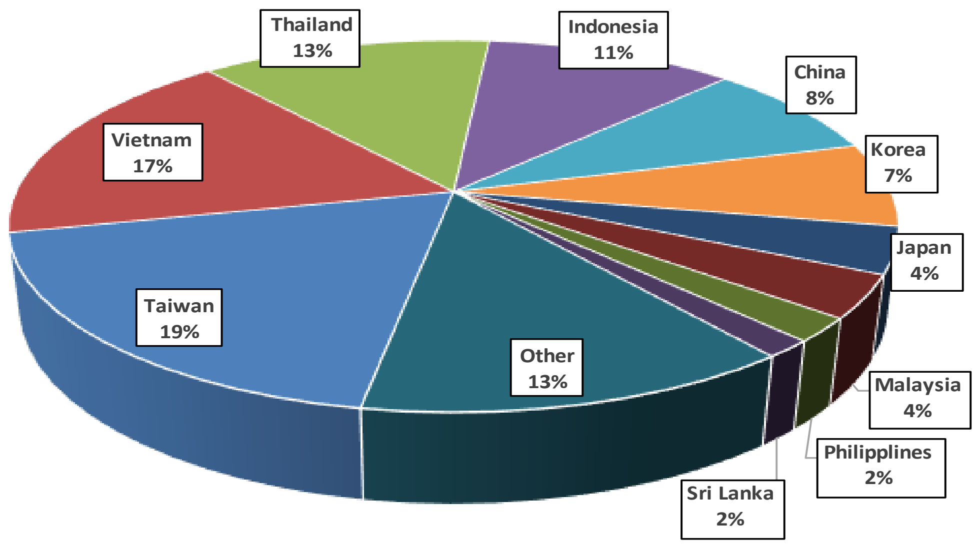
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option

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

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

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

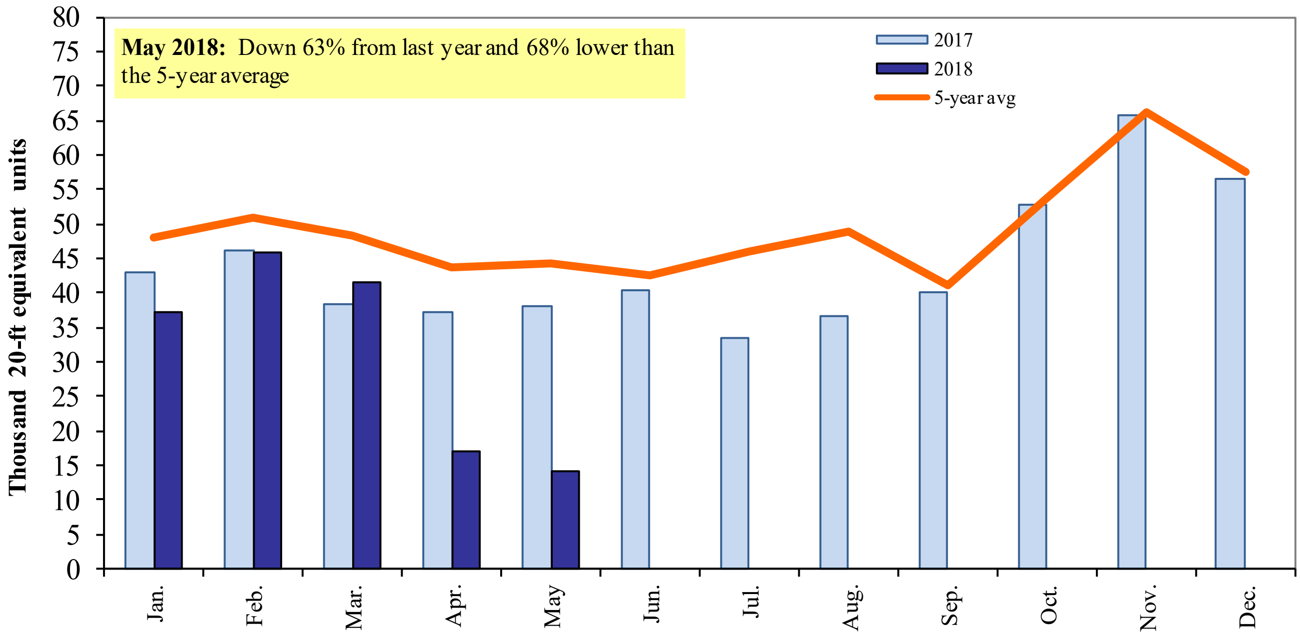
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-May 2018



Service (PIERS) data

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

Figure 19
Monthly Shipments of Containerized Grain to Asia



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

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

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