United States Department of Agriculture

Grain Transportation Report

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

Contact Us

December 6, 2018

Contents

The next release is December 13, 2018

WEEKLY HIGHLIGHTS

Wheat Inspections Rebound

For the week ending November 29, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.61 million metric tons (mmt), down 1 percent from the previous week, 9 percent from last year, and 17 percent below the 3-year average. Total inspections of wheat jumped 64 percent from the previous week, increasing primarily in the Pacific Northwest (PNW) and the Texas Gulf export regions. Shipments of wheat continued to increase to Asia and Latin America. Compared to the previous week, inspections of corn and soybeans decreased 12 and 7 percent, respectively. Week-to-week grain inspections in the PNW increased 14 percent, while Mississippi Gulf inspections decreased 2 percent. Outstanding export sales (unshipped) of grain increased for wheat and corn, but were down for soybeans.

Grain Vessel Loading Activity Remains Strong as Ocean Freight Rates Inch Up

Grain vessel loading activity in the U.S. Gulf and PNW ports has remained relatively strong so far during this last quarter of the year. During October and November, an average of 36 ocean-going grain vessels were loaded per week, while 41 vessels were either loading or waiting to be loaded in the U.S. Gulf. In the PNW, an average of 17 vessels were either loading or waiting to be loaded. During the previous quarter, a weekly average of 32 vessels were loaded and 28 vessels were loading or waiting to be loaded in the U.S. Gulf. Only 12 vessels were either loading or waiting to be loaded in the PNW during the same period. Meanwhile, ocean freight rates for shipping bulk grain from the U.S. Gulf to Japan averaged $48.38 per metric ton (mt) during November. The rates from PNW to Japan averaged $26.81 per mt. Both rates were 7 percent higher than third quarter levels. Year-to-date grain inspected for exports at U.S. ports has also remained strong.

CP Showcases New Grain Train

On December 4, Canadian Pacific Railway (CP) unveiled its next generation 8,500-foot "high efficiency product" (HEP) grain train at G3 Canada Limited's Pasqua elevator facility near Moose Jaw, Saskatchewan. G3 is a Canadian grain handling company. According to the press release, the HEP train can move 44 percent more grain from larger-capacity, shorter-length cars, which means more cars can fit on a train of the same length. The cars are part of a half-billion-dollar investment to upgrade the fleet. CP will have approximately 500 new hopper cars in service by the end of 2018 and 1,000 by spring 2019. Over the next four years, CP plans to purchase a total of 5,900 new hopper cars.

Snapshots by Sector

Export Sales

For the week ending November 22, **unshipped balances** of wheat, corn, and soybeans totaled 28.6 mmt, down 14 percent from the same time last year. Net weekly **wheat export sales** were .377 mmt, up 14 percent from the previous week. Net **corn export sales** were 1.27 mmt, up 44 percent from the previous week. Net **soybean export sales** were .629 mmt, up 8 percent from the past week.

Rail

U.S. Class I railroads originated 20,061 **grain carloads** for the week ending November 24, down 15 percent from the previous week, up 7 percent from last year, and down 4 percent from the 3-year average.

Average December shuttle **secondary railcar** bids/offers per car were $145 below tariff for the week ending November 29, up $5 from last week. Average non-shuttle secondary railcar bids/offers were $88 above tariff, up $91 from last week. There were no shuttle or non-shuttle bids/offers this week last year.

Barge

For the week ending December 1, **barge grain movements** totaled 670,384 tons, 27 percent lower than the previous week and down 5 percent from the same period last year.

For the week ending December 1, 429 grain barges **moved down river**, 147 less than the previous week. There were 903 grain barges **unloaded in New Orleans**, 5 percent higher than the previous week.

Ocean

For the week ending November 29, 40 **ocean-going grain vessels** were loaded in the Gulf, 7 percent less than the same period last year. Fifty-seven vessels are expected to be loaded within the next 10 days, 36 percent more than the same period last year.

For the week ending November 29, the ocean freight rate for shipping bulk grain, from the Gulf to Japan, was $48.00 per metric ton. The cost of shipping, from the PNW to Japan, was $26.25 per metric ton.

Fuel

For the week ending December 3, the **U.S. average diesel fuel price** decreased 5.4 cents from the previous week to $3.207 per gallon, 28.5 cents above the same week last year.

Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* December 6, 2018.
Web: **http://dx.doi.org/10.9752/TS056.12-06-2018**

Feature Article/Calendar

Third Quarter Wheat Transportation and Landed Costs Mixed

During the third quarter of 2018, transportation costs for shipping wheat to Japan through the Pacific Northwest (PNW) and U.S. Gulf were mixed. Although transportation costs to ship from Kansas increased slightly from quarter to quarter, the costs to ship from North Dakota were mixed (See *Tables1 and 2*). Rail and ocean rates increased from the previous quarter. Farm values in Kansas were up as well, but North Dakota farm values declined, helping to pull down total landed costs. Transportation costs for shipping wheat from Kansas to Japan through the PNW increased 2 percent from quarter-to-quarter, but the costs to ship from North Dakota to Japan through the PNW remained unchanged (*See Table 1*). The cost to ship from Kansas through the PNW to Japan increased 7 percent from last year. North Dakota transportation costs increased 3 percent for the same period.

Transportation costs for shipping wheat from Kansas and North Dakota to Japan through the U.S. Gulf increased 1 percent from the previous quarter (*See Table 2*). Year-to-year transportation costs for shipping wheat through the U.S. Gulf from Kansas and North Dakota increased 5 and 4 percent, due to higher ocean and rail rates. Third quarter wheat transportation costs represented 33 to 38 percent of the landed costs (farm value plus transportation costs), which is above the second quarter 2018 but mixed compared to the third quarter last year.

Table 1: Quarterly rate comparisons for shipping Kansas & North Dakota wheat to Japan through the PNW

	Kansas					North Dakota				
Mode	2017 3rd qtr	2018 2nd qtr	2018 3rd qtr	Year-to-Year change	Quarterly change	2017 3rd qtr	2018 2nd qtr	2018 3rd qtr	Year-to-Year change	Quarterly change
			$/metric ton	%	%			$/metric ton	%	%
Truck	13.02	12.06	10.54	-19.05	-12.60	13.02	12.06	10.54	-19.05	-12.60
Rail[1]	59.15	60.73	63.41	7.20	4.41	55.72	55.72	56.55	1.49	1.49
Ocean vessel	20.71	24.37	24.97	20.57	2.46	20.71	24.37	24.97	20.57	2.46
Transportation Costs	92.88	97.16	98.92	6.50	1.81	89.45	92.15	92.06	2.92	-0.10
Farm Value[2]	146.36	175.02	184.94	26.36	5.67	216.67	205.40	189.48	-12.55	-7.75
Total Landed Cost	239.24	272.18	283.86	18.65	4.29	306.12	297.55	281.54	-8.03	-5.38
Transport % of landed cost	38.82	35.70	34.85			29.22	30.97	32.70		

Table 2: Quarterly rate comparisons for shipping Kansas & North Dakota wheat to Japan through the Gulf

	Kansas					North Dakota				
Mode	2017 3rd qtr	2018 2nd qtr	2018 3rd qtr	Year-to-Year change	Quarterly change	2017 3rd qtr	2018 2nd qtr	2018 3rd qtr	Year-to-Year change	Quarterly change
			$/metric ton	%	%			$/metric ton	%	%
Truck	13.02	12.06	10.54	-19.05	-12.60	13.02	12.06	10.54	-19.05	-12.60
Rail[1]	41.42	41.83	42.66	2.99	1.98	58.60	58.90	59.73	1.93	1.41
Ocean vessel	39.23	43.68	45.23	15.29	3.55	39.23	43.68	45.23	15.29	3.55
Transportation Costs	93.67	97.57	98.43	5.08	0.88	110.85	114.64	115.50	4.19	0.75
Farm Value[2]	146.36	175.02	184.94	26.36	5.67	216.67	205.40	189.48	-12.55	-7.75
Total Landed Cost	240.03	272.59	283.37	18.06	3.95	327.52	320.04	304.98	-6.88	-4.71
Transport % of landed cost	39.02	35.79	34.74			33.85	35.82	37.87		

Source: USDA/AMS/TMP

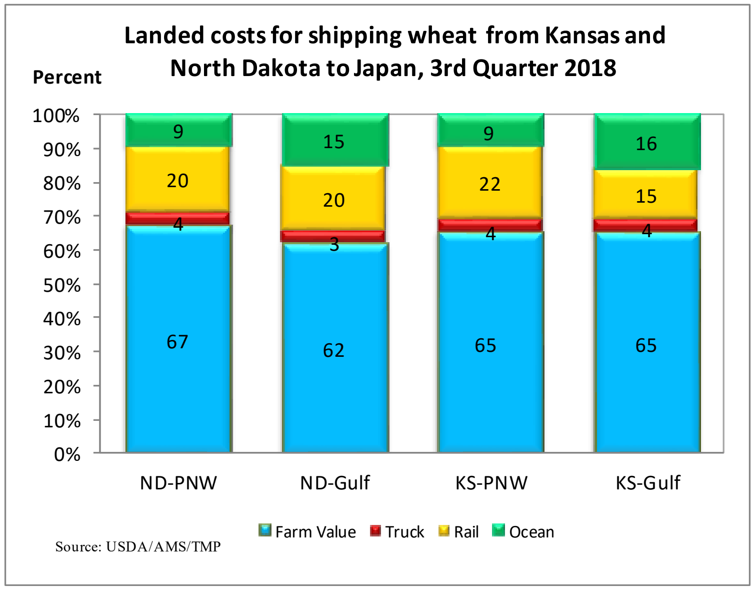
[1] Rail tariff rates include fuel surcharges and revisions for heavy axle railcars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car

[2] Source: USDA/NASS, wheat prices for North Dakota (mainly HRS) and Kansas (mainly HRW)

The total landed cost for shipping wheat to Japan ranged from $282 to $305 per metric ton (mt), below the previous quarter but above last year for each route (See *Tables 1 and 2*). Quarter-to-quarter total landed costs increased from Kansas for each route due to increased overall transportation costs and higher farm values, but North Dakota landed costs for each route decreased due to falling farm values. Year-to-year landed costs were also up for shipping wheat from Kansas, but down for North Dakota.

Quarter-to-quarter total landed costs increased 4 percent for shipping wheat through the PNW from Kansas but decreased 5 percent from North Dakota. Year-to-year landed costs for shipping wheat through the PNW increased 19 percent from Kansas but decreased 8 percent from North Dakota. Quarter-to-quarter landed costs to ship through the U.S. Gulf increased 4 percent for Kansas but dropped 5 percent for North Dakota. Year-to-year landed costs for shipping wheat through the U.S. Gulf increased 18 percent for Kansas but decreased 7 percent for North Dakota (*see table 2*).

Third quarter farm values for wheat produced in Kansas represented 65 percent of the landed cost for shipping through the PNW and the Gulf, above the second quarter 2018 and the third quarter 2017 (*See Tables and Figure*). Third quarter North Dakota wheat farm values accounted for 67 percent of landed cost through the PNW and 62 percent of the total landed cost through the Gulf, below the second quarter of 2018 and the third quarter of last year for each route (*see tables*).



Ocean rates for shipping wheat from the PNW and Gulf to Japan increased 2 and 4 percent from the second quarter. Ocean rates in the PNW and Gulf increased 21 and 15 percent from year to year due to increasing demand for iron ore and coal (***see Grain Transportation Report dated 10/25/18)*.**

Quarter-to-quarter rail rates for shipping wheat from Kansas to the PNW increased over 4 percent. North Dakota rail rates increased over 1 percent. Year-to-year rail rates to ship wheat from Kansas and North Dakota through the PNW increased 7 and 1 percent. Quarter-to-quarter rail rates for shipping wheat from Kansas to the Gulf increased 2 percent, but North Dakota through the Gulf increased 1 percent. Year-to-year rail rates for shipping wheat to the Gulf increased 3 percent from Kansas and 2 percent for North Dakota (*see table 2)*. The cost of moving wheat from each State by truck to a rail-served grain elevator dropped 13 percent from quarter to quarter and 19 percent from year to year, due to primarily to less demand for shipping grain by truck.

Third quarter total inspections of wheat destined for export to Japan reached .770 million metric tons (mmt), which is down 19 percent from the same time last year and represents 14 percent of total third quarter U.S. wheat exports, according to the Grain Inspection Packers and Stockyards Administration. For the same period, total U.S. wheat exports reached 5.4 mmt, down 28 percent from last year. For the 2018/19 marketing year, year-to-date cumulative (shipped) export sales of all wheat are down 20 percent from the past year (*see* ***GTR, Table 12****)*.
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Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit Train	Shuttle		Gulf	Pacific
12/05/18	215	274	215	189	215	186
11/28/18	219	273	214	179	n/a	n/a

[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

n/a = not availabe due to Thanksgiving holiday

Table 2

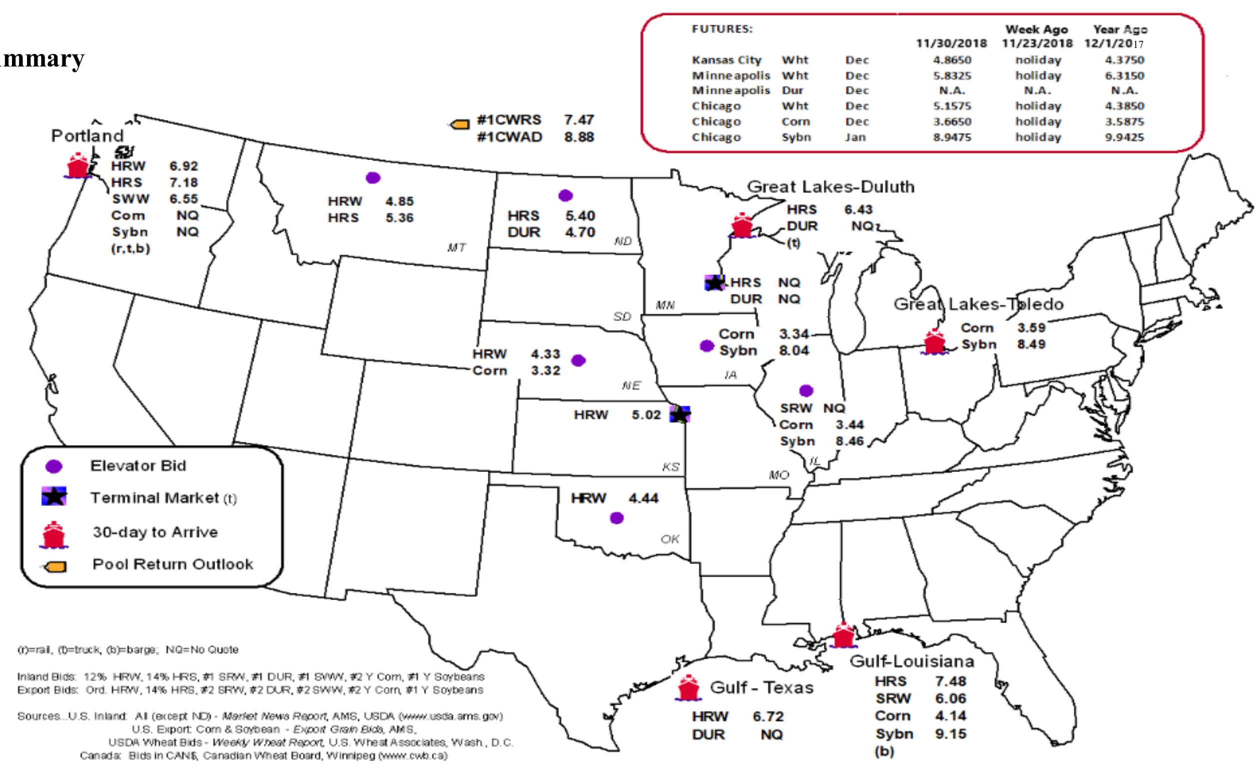
Market Update: U.S. Origins to Export Position Price Spreads ($/bushel)

Commodity	Origin--Destination	11/30/2018	11/23/2018
Corn	IL--Gulf	-0.70	n/a
Corn	NE--Gulf	-0.82	n/a
Soybean	IA--Gulf	-1.11	n/a
HRW	KS--Gulf	-1.70	n/a
HRS	ND--Portland	-1.78	n/a

Note: nq = no quote; n/a = not available due to the Thanksgiving holiday
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]
11/28/2018[p]	213	468	5,092	456	6,229	11/24/2018	3,584
11/21/2018[r]	206	411	4,650	469	5,736	11/17/2018	3,069
2018 YTD[r]	21,595	43,714	290,510	20,010	375,829	2018 YTD	119,091
2017 YTD[r]	27,241	72,446	262,385	20,620	382,692	2017 YTD	111,709
2018 YTD as % of 2017 YTD	79	60	111	97	98	% change YTD	107
Last 4 weeks as % of 2017[2]	78	46	89	91	82	Last 4wks % 2017	145
Last 4 weeks as % of 4-year avg.[2]	29	35	73	55	61	Last 4wks % 4 yr	158
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.

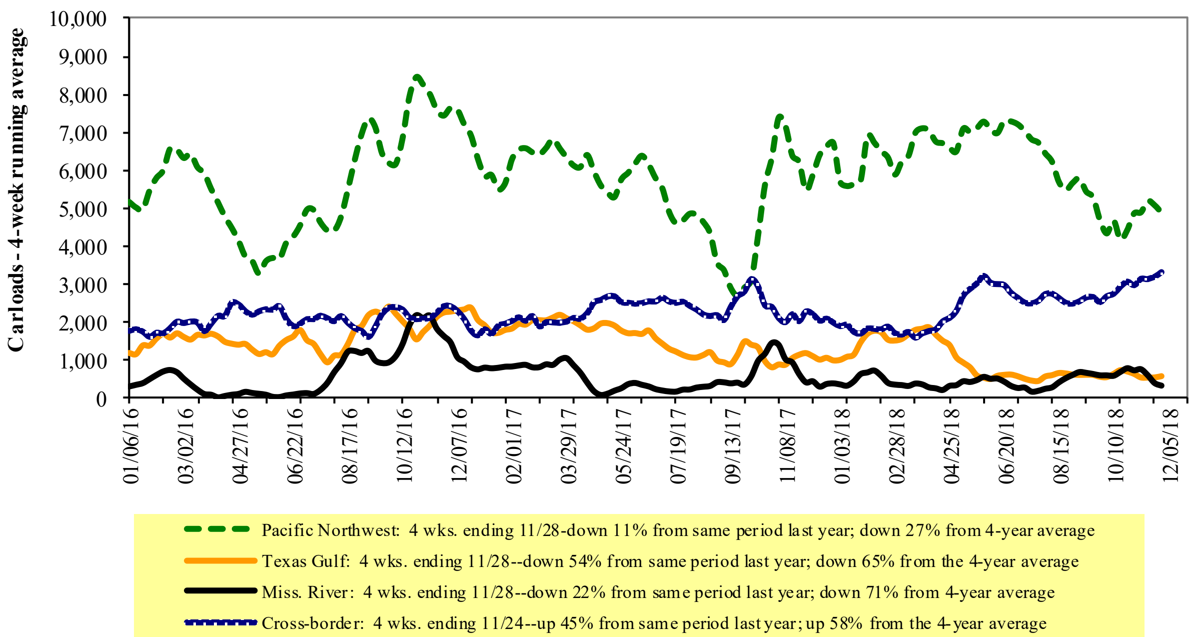
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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: 11/24/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,577	2,639	11,006	798	4,041	20,061	5,017	4,098
This week last year	1,582	2,555	9,891	518	4,142	18,688	3,606	4,884
2018 YTD	90,942	119,348	576,255	43,832	243,071	1,073,448	191,825	220,752
2017 YTD	80,342	129,892	519,710	45,629	264,246	1,039,819	181,077	220,809
2018 YTD as % of 2017 YTD	113	92	111	96	92	103	106	100
Last 4 weeks as % of 2017*	103	81	104	89	97	98	109	96
Last 4 weeks as % of 3-yr avg.**	100	74	96	96	86	91	104	92
Total 2017	89,465	142,748	578,964	50,223	289,574	1,150,974	198,460	244,766

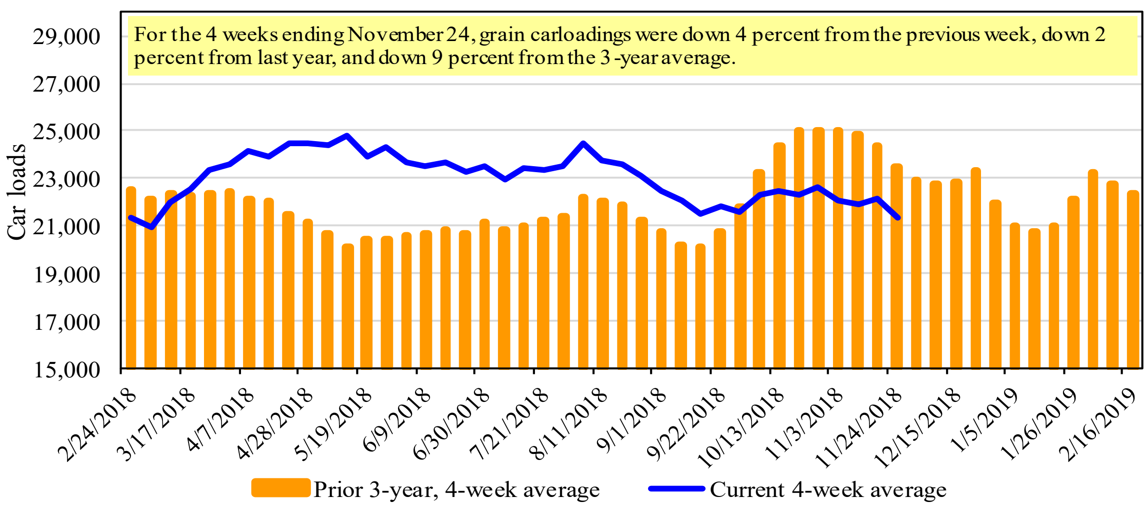
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 11/29/2018		Dec-18	Dec-17	Jan-19	Jan-18	Feb-19	Feb-18	Mar-19	Mar-18
BNSF[3]	COT grain units	no offer	no bids	no bid	0	no bid	no bids	no bid	no bids
	COT grain single-car[5]	no offer	1	104	0	31	0	16	0
UP[4]	GCAS/Region 1	no bid	no bids	no bid	no bids	no offer	no bids	n/a	n/a
	GCAS/Region 2	no bid	no bids	10	no bids	no offer	no bids	n/a	n/a

(Delivery period)

[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.

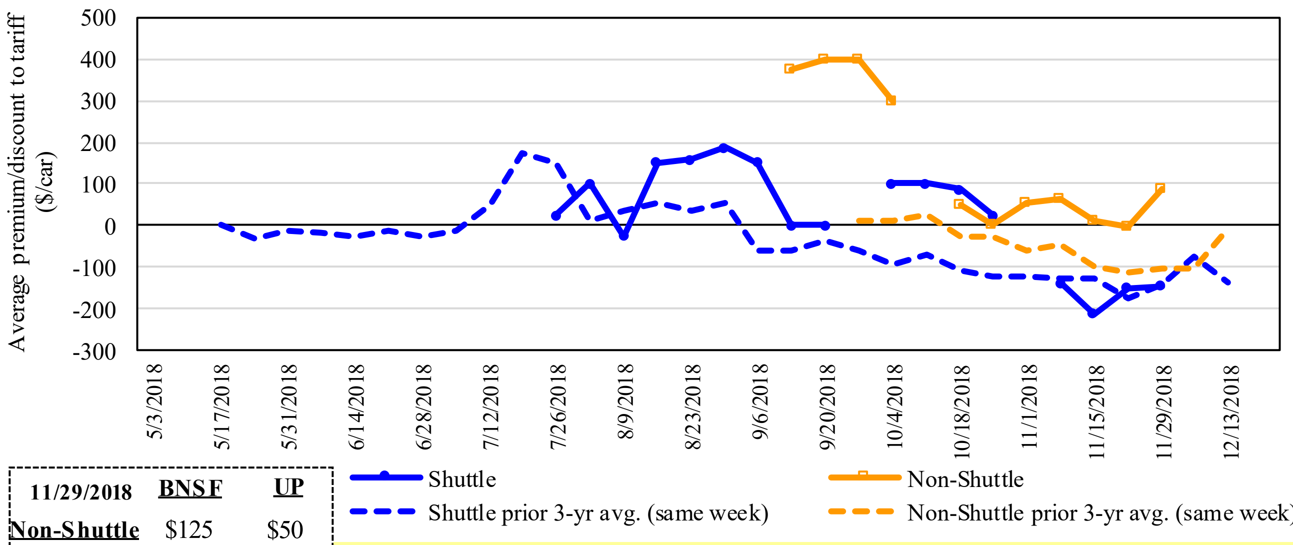
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

[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

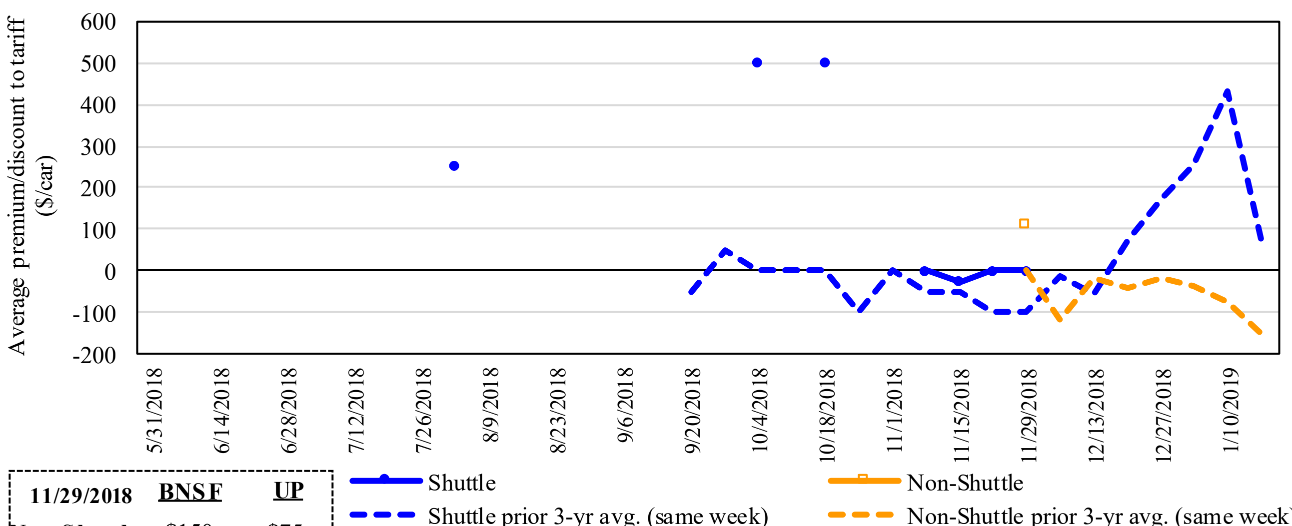


11/29/2018	BNSF	UP
Non-Shuttle	$125	$50
Shuttle	-$2	-$288

Average Non-shuttle bids/offers rose $91 this week, and are $313 below the peak.
Average Shuttle bids/offers rose $5 this week and are $332 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



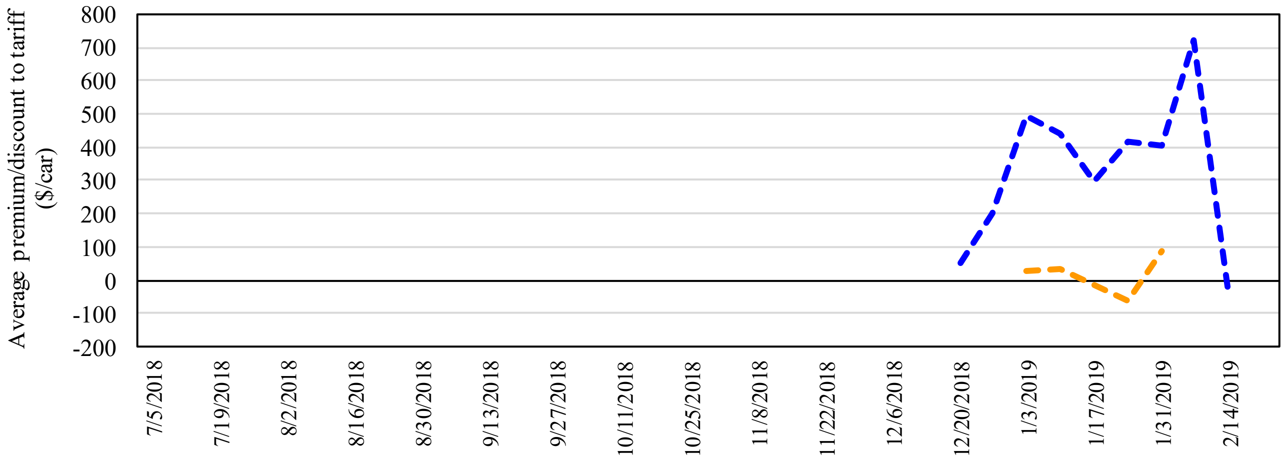
11/29/2018	BNSF	UP
Non-Shuttle	$150	$75
Shuttle	n/a	$0

There were no Non-Shuttle bids/offers last week. Average Non-Shuttle bids/offers this week are at the peak.
Average Shuttle bids/offers are unchanged this week and are $500 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



11/29/2018	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: 11/29/2018	Dec-18	Jan-19	Feb-19	Mar-19	Apr-19	May-19
Non-shuttle	**BNSF-GF**	**125**	**150**	**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	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**50**	**75**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	81	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**	**(2)**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	48	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	**(288)**	**0**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(38)	0	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

(Delivery period: Dec-18 through May-19)

[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]

December, 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	$132	$40.86	$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	$231	$47.38	$1.29	2
	Sioux Falls, SD	Galveston-Houston, TX	$6,911	$0	$68.63	$1.87	2
	Northwest KS	Galveston-Houston, TX	$4,816	$254	$50.34	$1.37	2
	Amarillo, TX	Los Angeles, CA	$5,121	$353	$54.36	$1.48	5
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$262	$42.32	$1.07	5
	Toledo, OH	Raleigh, NC	$6,581	$0	$65.35	$1.66	4
	Des Moines, IA	Davenport, IA	$2,258	$55	$22.97	$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	$163	$37.46	$0.95	2
	Des Moines, IA	Los Angeles, CA	$5,327	$474	$57.61	$1.46	4
Soybeans	Minneapolis, MN	New Orleans, LA	$4,131	$268	$43.68	$1.19	17
	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	$262	$49.72	$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	$416	$62.84	$1.71	5
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	$262	$40.33	$1.02	5
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	5
	Des Moines, IA	Amarillo, TX	$4,060	$205	$42.35	$1.08	5
	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	$302	$50.41	$1.37	3
	Toledo, OH	Huntsville, AL	$4,634	$0	$46.02	$1.25	6
	Grand Island, NE	Portland, OR	$5,710	$426	$60.93	$1.66	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

Date:	December, 2018			Fuel			Percent
	Origin		Tariff	surcharge	Tariff plus surcharge per:		change[4]
Commodity	state	Destination region	rate/car[1]	per car[2]	metric ton[3]	bushel[3]	Y/Y
Wheat	MT	Chihuahua, CI	$7,284	$0	$74.43	$2.02	-2
	OK	Cuautitlan, EM	$6,743	$181	$70.75	$1.92	3
	KS	Guadalajara, JA	$7,371	$441	$79.82	$2.17	3
	TX	Salinas Victoria, NL	$4,329	$110	$45.36	$1.23	2
Corn	IA	Guadalajara, JA	$8,528	$407	$91.30	$2.32	4
	SD	Celaya, GJ	$7,880	$0	$80.51	$2.04	2
	NE	Queretaro, QA	$8,207	$377	$87.70	$2.23	4
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	2
	MO	Tlalnepantla, EM	$7,573	$367	$81.13	$2.06	5
	SD	Torreon, CU	$7,480	$0	$76.43	$1.94	2
Soybeans	MO	Bojay (Tula), HG	$8,284	$377	$88.49	$2.41	4
	NE	Guadalajara, JA	$8,842	$411	$94.54	$2.57	3
	IA	El Castillo, JA	$9,110	$0	$93.08	$2.53	2
	KS	Torreon, CU	$7,714	$305	$81.93	$2.23	5
Sorghum	NE	Celaya, GJ	$7,527	$377	$80.76	$2.05	4
	KS	Queretaro, QA	$8,000	$226	$84.05	$2.13	4
	NE	Salinas Victoria, NL	$6,633	$182	$69.62	$1.77	4
	NE	Torreon, CU	$6,962	$292	$74.12	$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

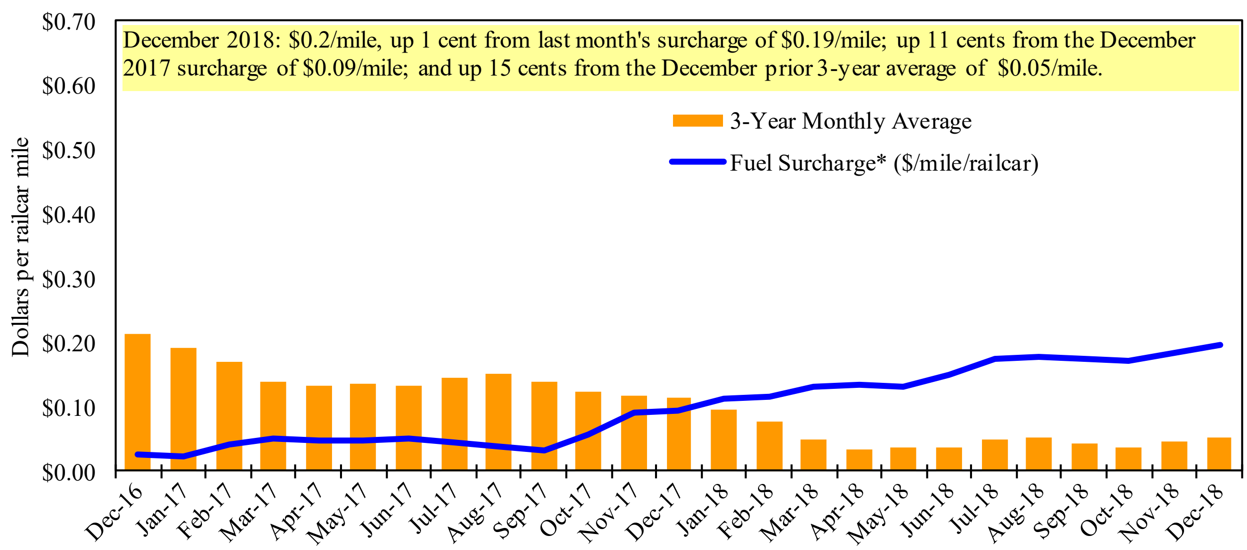
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[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.

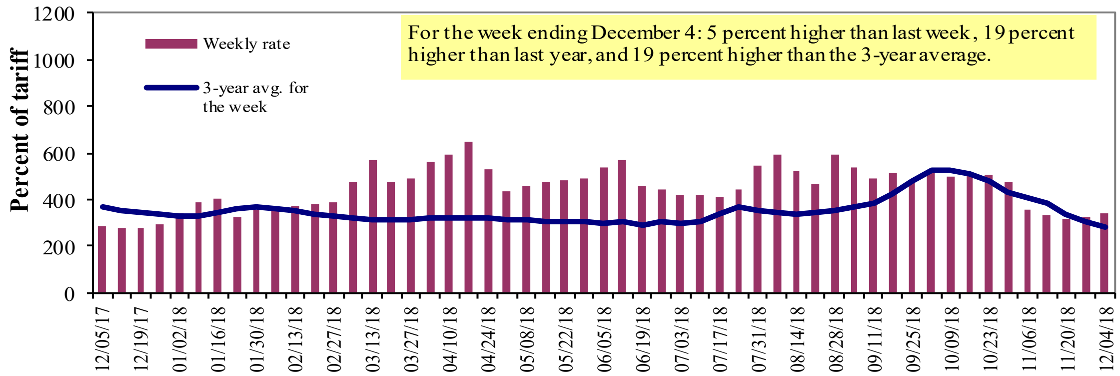
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.

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]	12/4/2018	-	338	340	250	275	275	218
	11/27/2018	-	333	323	235	280	280	225
$/ton	12/4/2018	-	17.98	15.78	9.98	12.90	11.11	6.85
	11/27/2018	-	17.72	14.99	9.38	13.13	11.31	7.07
Current week % change from the same week:								
	Last year	-	-	19	28	3	3	26
	3-year avg. [2]	-	8	19	24	3	5	22
Rate[1]	January	-	-	345	245	275	275	215
	March	-	-	345	245	275	275	205

[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 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.

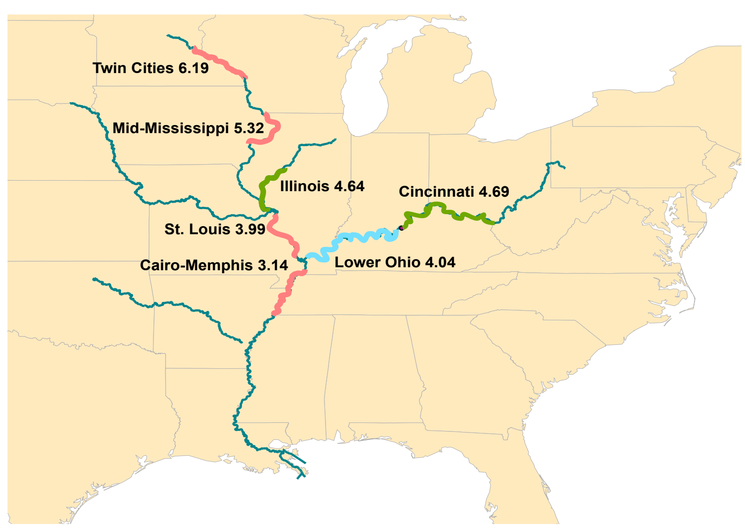
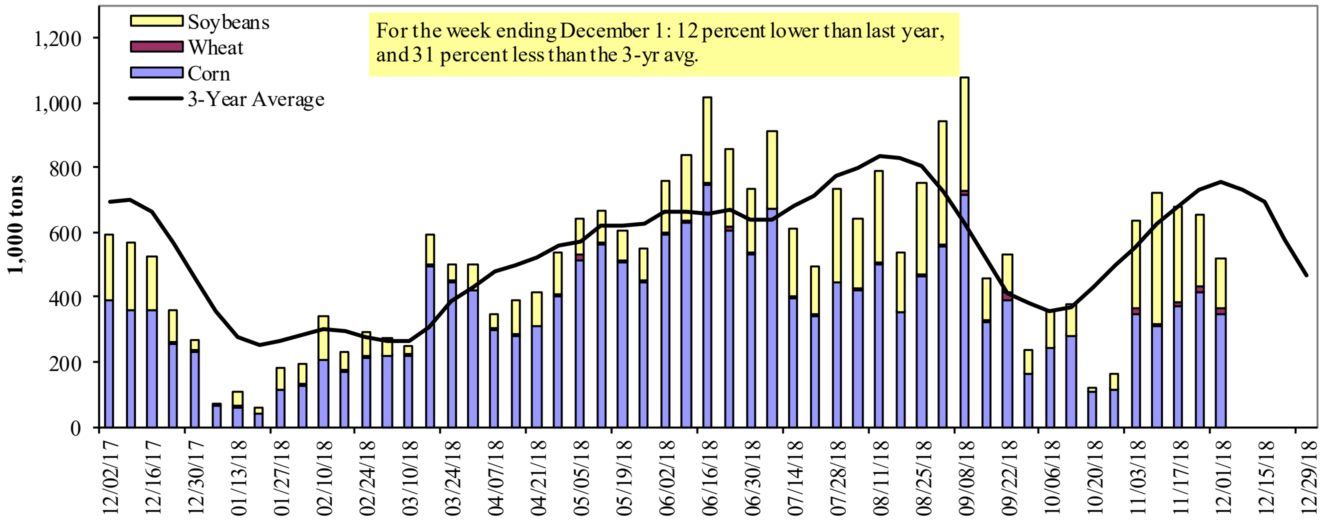


Figure 10

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 12/01/2018	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	162	3	78	3	247
Winfield, MO (L25)	335	8	133	6	482
Alton, IL (L26)	350	14	164	6	535
Granite City, IL (L27)	350	16	153	6	525
Illinois River (L8)	50	2	41	0	93
Ohio River (OLMSTED)	33	0	66	7	106
Arkansas River (L1)	0	6	34	0	39
Weekly total - 2018	383	22	253	13	670
Weekly total - 2017	409	4	274	23	709
2018 YTD[1]	21,648	1,557	11,713	115	35,032
2017 YTD	20,832	2,114	14,799	323	38,068
2018 as % of 2017 YTD	104	74	79	35	92
Last 4 weeks as % of 2017[2]	94	160	76	39	85
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.

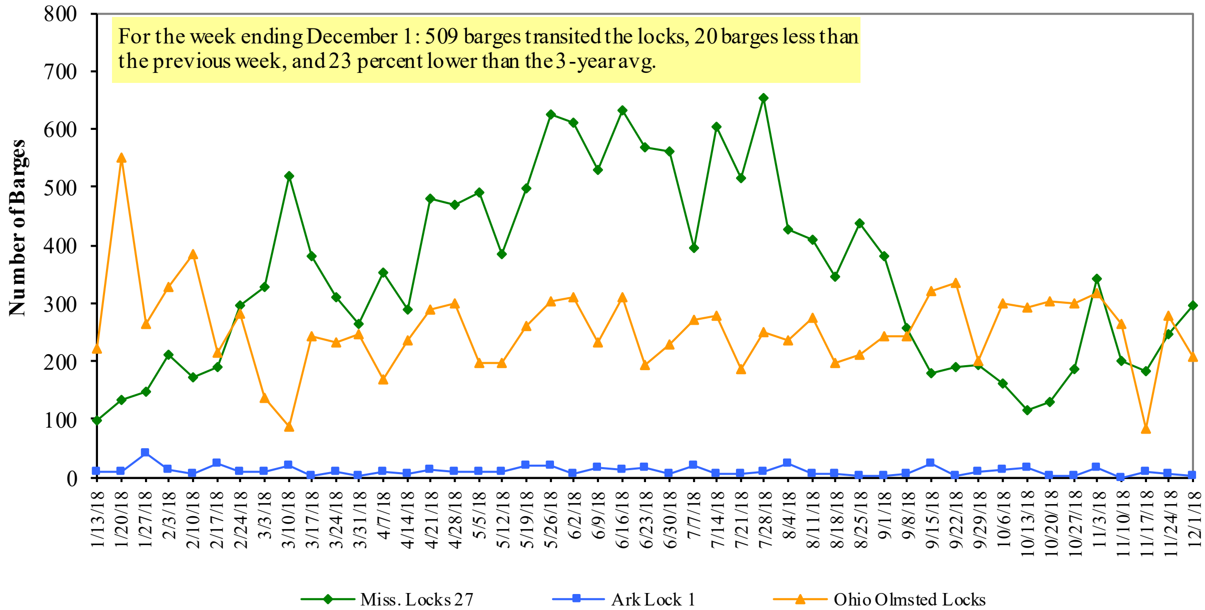
[2] As a percent of same period in 2017.

Note: 1. Total may not add exactly, due to rounding.
2. Starting from 11/24/2018, weekly movement through Ohio 52 is replaced by Olmsted.

Source: U.S. Army Corps of Engineers

Figure 11

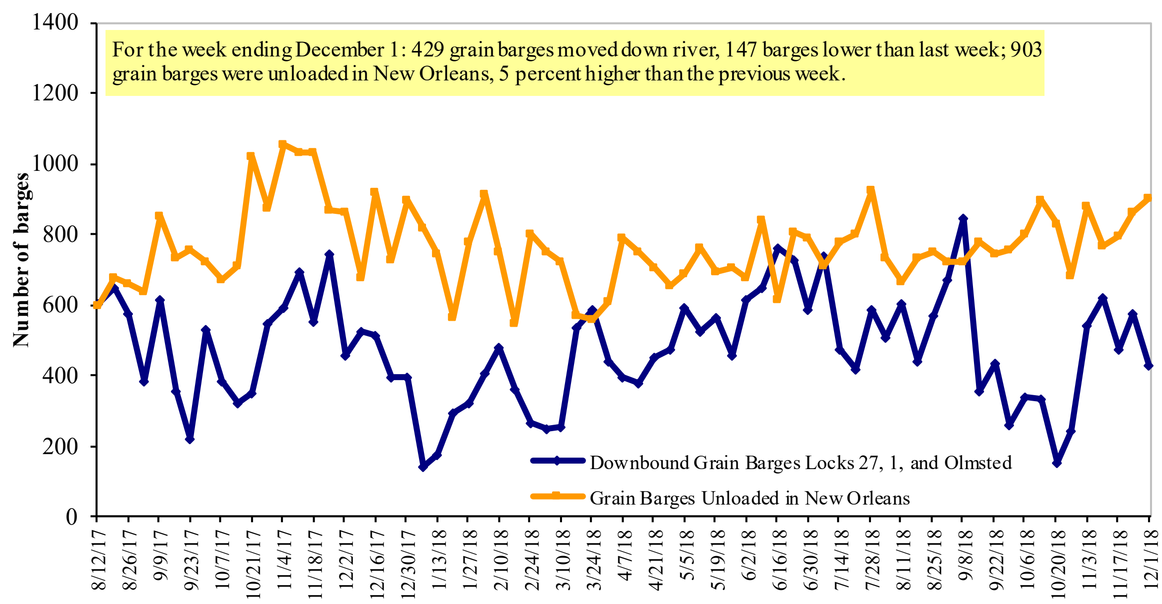
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 12/3/2018 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.229	-0.048	0.325
	New England	3.310	-0.034	0.413
	Central Atlantic	3.394	-0.053	0.332
	Lower Atlantic	3.098	-0.047	0.304
II	Midwest[2]	3.117	-0.068	0.240
III	Gulf Coast[3]	2.989	-0.046	0.276
IV	Rocky Mountain	3.291	-0.048	0.272
V	West Coast	3.694	-0.045	0.321
	West Coast less California	3.406	-0.049	0.300
	California	3.922	-0.042	0.337
Total	U.S.	3.207	-0.054	0.285

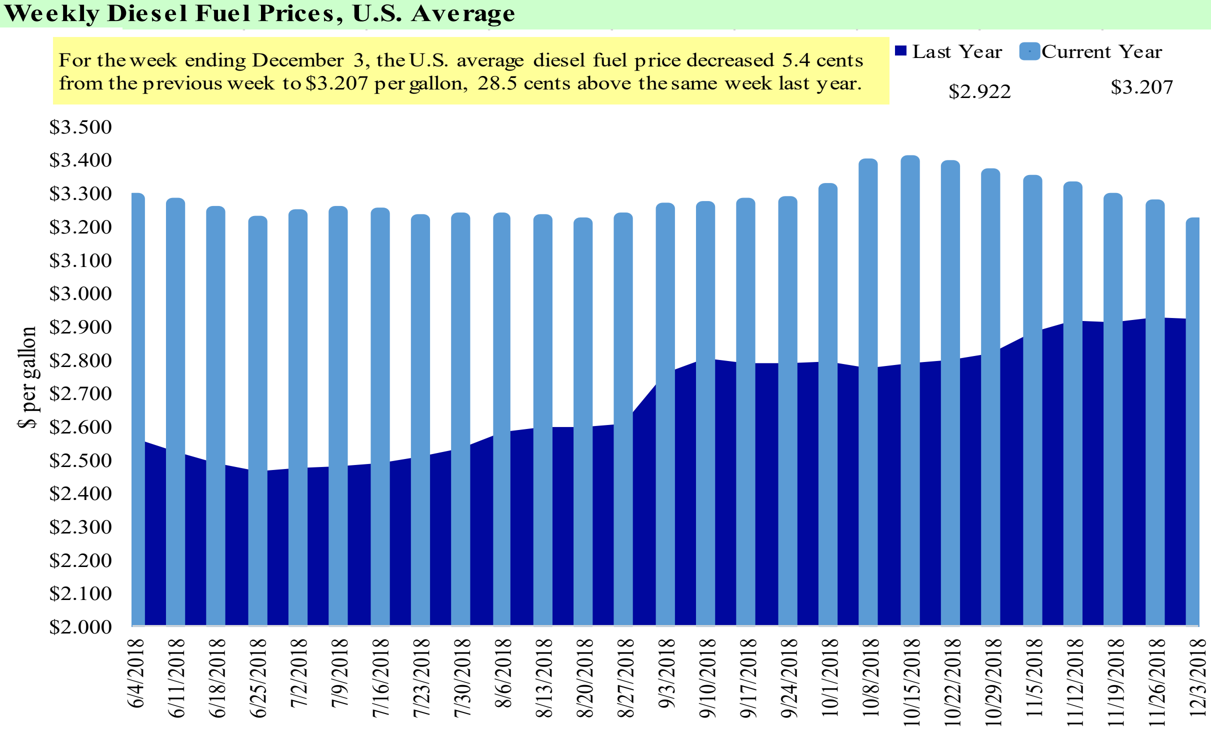
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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

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

Figure 13

Weekly Diesel Fuel Prices, U.S. Average



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

Grain Exports

Table 12

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

For the week ending	Wheat HRW	SRW	HRS	SWW	DUR	All wheat	Corn	Soybeans	Total
Export Balances[1]									
11/22/2018	1,447	655	1,890	1,147	156	5,295	11,968	11,342	28,605
This week year ago	1,941	523	1,676	1,327	59	5,525	14,529	13,304	33,358
Cumulative exports-marketing year[2]									
2018/19 YTD	2,846	1,144	2,925	2,439	244	9,597	13,602	11,915	35,114
2017/18 YTD	4,770	1,080	3,004	2,585	201	11,640	7,494	21,022	40,156
YTD 2018/19 as % of 2017/18	60	106	97	94	121	82	181	57	87
Last 4 wks as % of same period 2017/18	73	128	112	84	262	95	82	91	88
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 11/22/2018	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	8,193	8,774	(7)	13,691
Japan	4,485	3,651	23	11,247
Korea	2,139	881	143	4,754
Colombia	1,524	1,375	11	4,678
Peru	1,186	1,278	(7)	2,975
Top 5 Importers	**17,527**	**15,958**	**10**	**37,344**
Total US corn export sales	**25,570**	**22,023**	**16**	**53,184**
% of Projected	41%	36%		
Change from prior week[2]	**1,267**	**599**		
Top 5 importers' share of U.S. corn export sales	69%	72%		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 11/22/2018	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	585	19,364	(97)	31,228
Mexico	3,446	1,803	91	3,716
Indonesia	786	713	10	2,250
Japan	1,044	908	15	2,145
Netherlands	886	586	51	2,209
Top 5 importers	**6,748**	**23,375**	**(71)**	**41,549**
Total US soybean export sales	**23,258**	**34,326**	**(32)**	**55,113**
% of Projected	45%	59%		
Change from prior week[2]	**629**	**943**		
Top 5 importers' share of U.S. soybean export sales	29%	68%		**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 11/22/2018	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	1,824	2,087	(13)	2,781
Japan	1,853	1,913	(3)	2,649
Philippines	2,252	2,015	12	2,441
Korea	1,012	1,215	(17)	1,257
Nigeria	707	812	(13)	1,254
Indonesia	611	796	(23)	1,076
Taiwan	672	752	(11)	1,066
China	0	782	(100)	944
Colombia	416	203	105	714
Thailand	588	440	33	618
Top 10 importers	**9,933**	**11,015**	(10)	**14,800**
Total US wheat export sales	**14,891**	**16,980**	**(12)**	**22,869**
% of Projected	53%	69%		
Change from prior week[2]	**377**	**184**		
Top 10 importers' share of U.S. wheat export sales	67%	65%		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 11/29/18	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	325	156	209	12,010	13,635	88	145	148	14,805
Corn	322	413	78	18,930	10,259	185	n/a	518	10,928
Soybeans	0	0	n/a	7,501	11,795	64	11	11	13,246
Total	**646**	**569**	**114**	**38,441**	**35,689**	**108**	**88**	**80**	**38,978**
Mississippi Gulf									
Wheat	54	92	58	3,603	4,036	89	111	97	4,198
Corn	576	549	105	31,711	27,343	116	145	143	28,690
Soybeans	875	891	98	25,573	29,484	87	72	67	32,911
Total	**1,504**	**1,532**	**98**	**60,887**	**60,864**	**100**	**89**	**84**	**65,800**
Texas Gulf									
Wheat	82	15	546	2,855	6,014	47	87	95	6,354
Corn	0	0	n/a	702	710	99	244	64	733
Soybeans	0	0	n/a	69	219	31	0	0	292
Total	**82**	**15**	**546**	**3,626**	**6,944**	**52**	**80**	**58**	**7,379**
Interior									
Wheat	17	25	67	1,485	1,600	93	128	106	1,727
Corn	115	199	58	8,165	8,188	100	78	103	8,758
Soybeans	119	94	126	6,312	5,067	125	103	108	5,508
Total	**251**	**319**	**79**	**15,963**	**14,855**	**107**	**90**	**105**	**15,993**
Great Lakes									
Wheat	20	15	136	762	641	119	107	80	711
Corn	0	0	n/a	404	189	214	0	0	192
Soybeans	61	73	83	1,152	825	140	162	134	890
Total	**81**	**88**	**92**	**2,318**	**1,655**	**140**	**137**	**106**	**1,793**
Atlantic									
Wheat	0	0	n/a	69	46	149	0	0	46
Corn	5	0	n/a	133	32	412	203	501	32
Soybeans	41	122	34	1,885	1,712	110	75	64	2,001
Total	**46**	**122**	**38**	**2,087**	**1,790**	**117**	**77**	**64**	**2,079**
U.S. total from ports*									
Wheat	498	303	164	20,784	25,974	80	122	119	27,841
Corn	1,017	1,161	88	60,045	46,721	129	182	171	49,333
Soybeans	1,096	1,180	93	42,492	49,102	87	58	54	54,847
Total	**2,611**	**2,644**	**99**	**123,321**	**121,797**	**101**	**89**	**84**	**132,021**

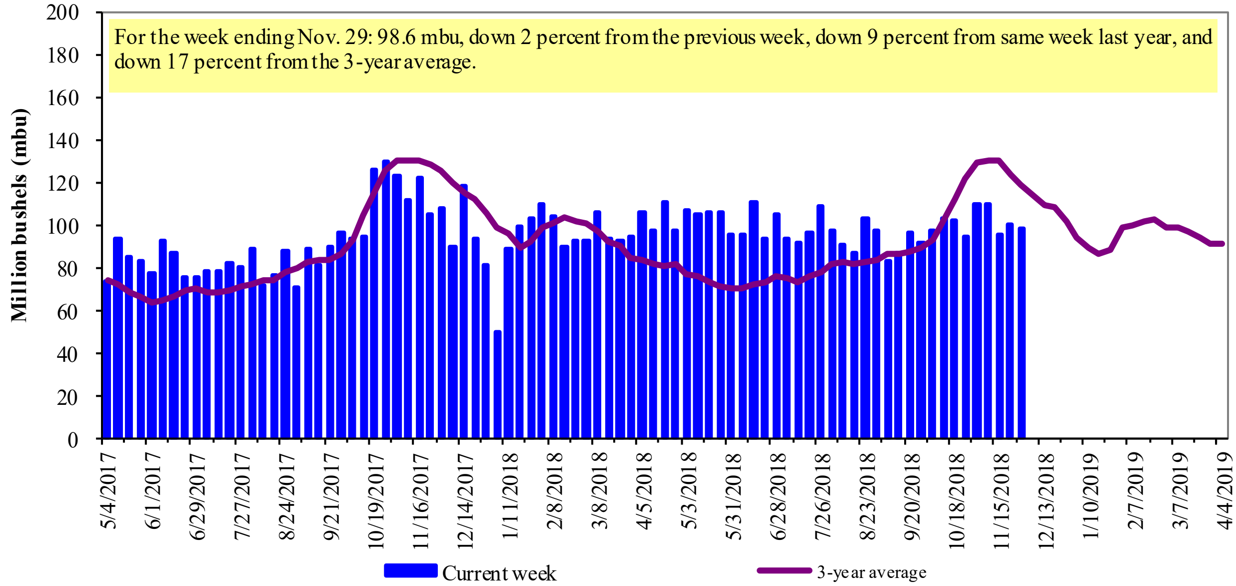
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

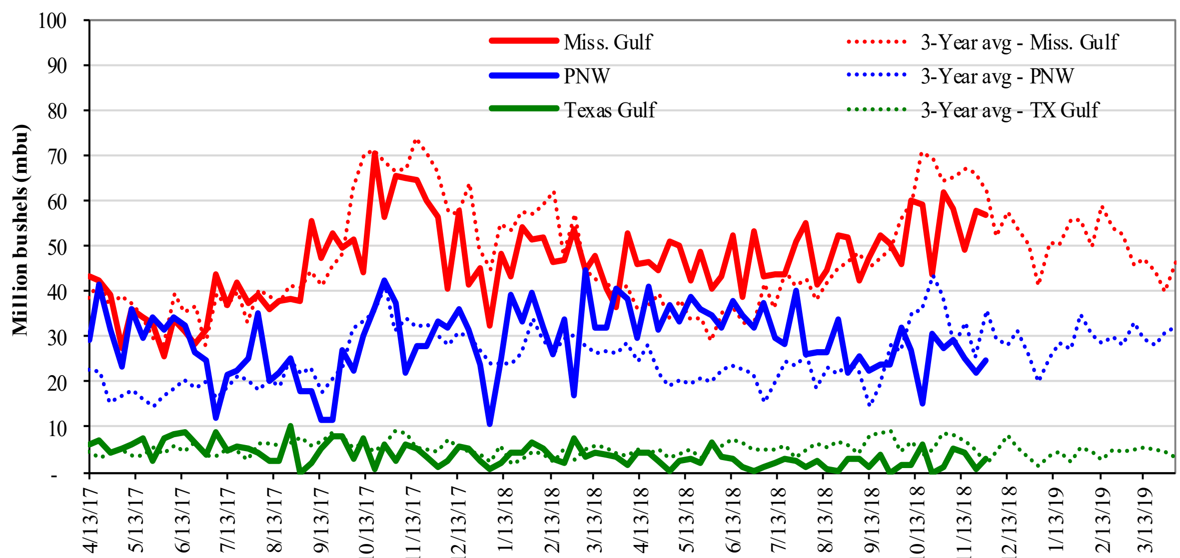
U.S. grain inspected for export (wheat, corn, and soybeans)



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 11/29/18 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Mississippi Gulf:	56.8	Last Week:	down 2	up 446	up 3	up 12
PNW:	24.6	Last Year (same week):	up 1	up 174	up 4	down 26
Texas Gulf:	3.0	3-yr avg. (4-wk. mov. Avg):	down 13	down 45	down 15	down 20

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

Ocean Transportation

Table 17

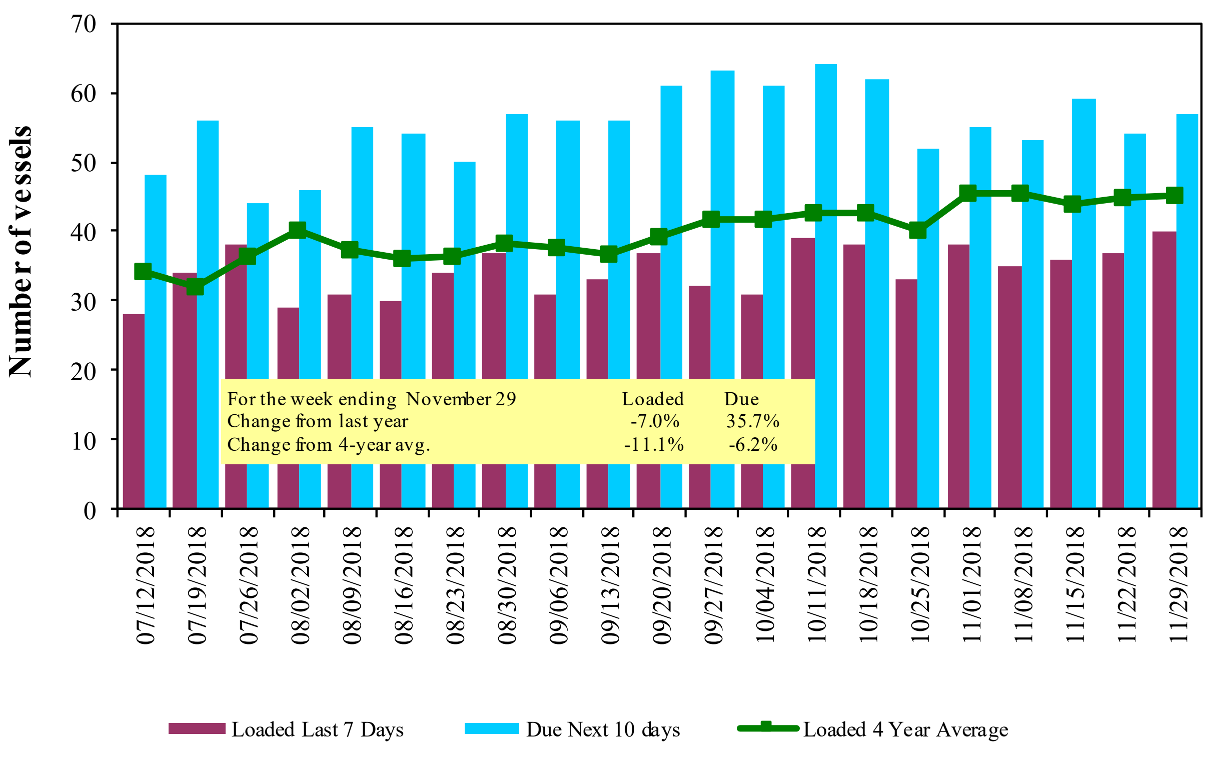
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
11/29/2018	28	40	57	17
11/22/2018	35	37	54	n/a
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg.	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

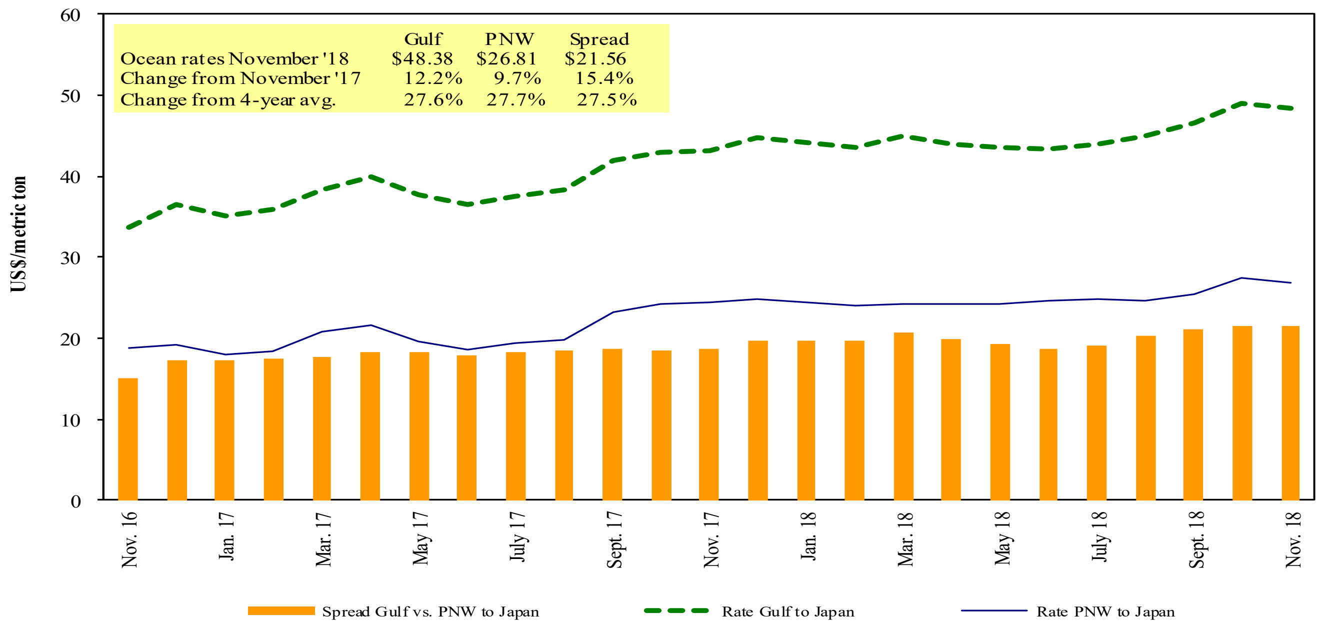
U.S. Gulf Vessel Loading Activity



Source:Transportation & Marketing 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 12/01/2018

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Djibouti	Wheat	Dec 27/Jan 7	9,800	113.11*
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 15/20	60,000	37.50
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

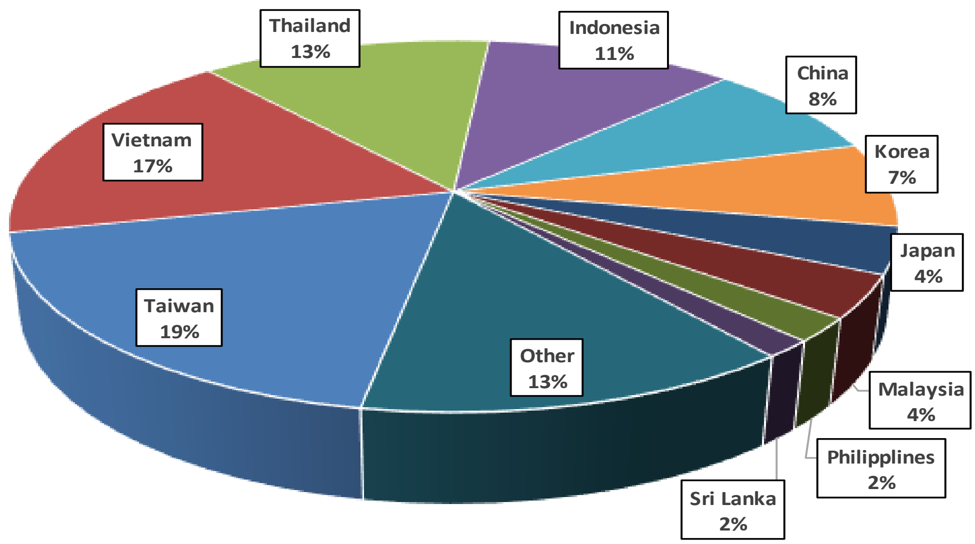
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option

*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.

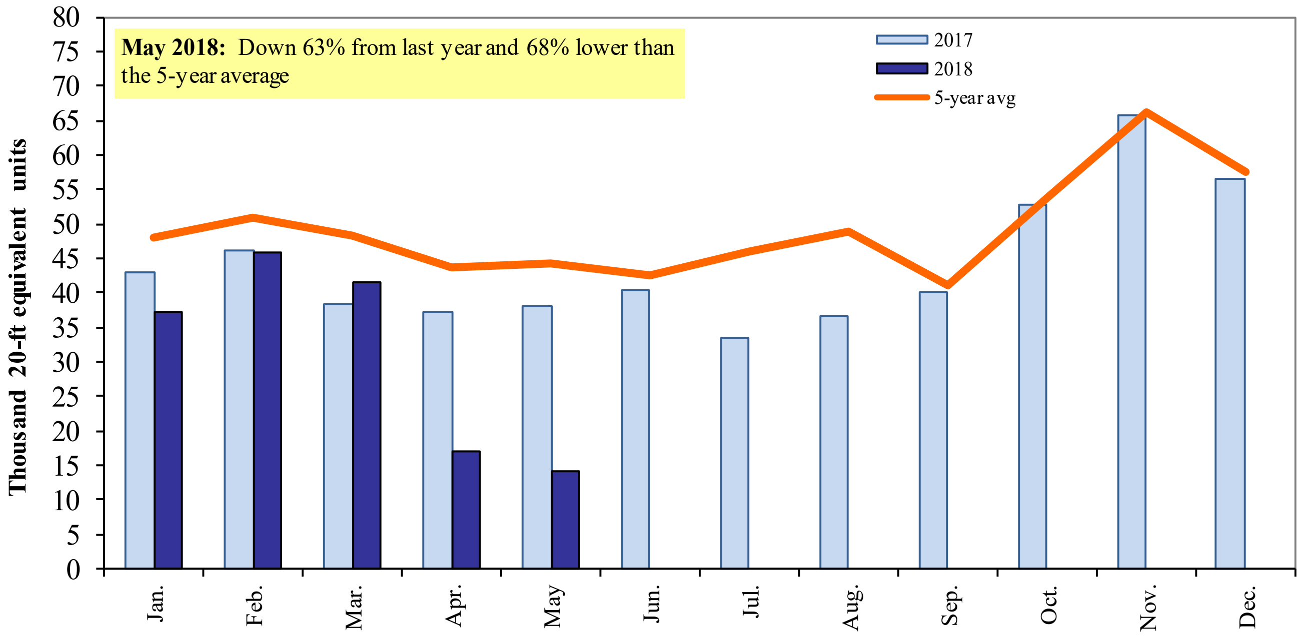
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-May 2018



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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Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* December 6, 2018. Web: **http://dx.doi.org/10.9752/TS056.12-06-2018**