United States Department of Agriculture

# Grain Transportation Report

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

Contact Us

**March 21, 2019**

## Contents



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**The next release is March 28, 2019**

## WEEKLY HIGHLIGHTS

### Highwater Causes Multiple Lock Closures on Upper Mississippi River

Heavy rains and the start of seasonal run-off from the melting of snow and ice have raised river levels throughout the central U.S. As of March 20, the following Mississippi River locks are closed: Lock 16, Lock 17, Lock 18, Lock 20, and Lock 22. In addition, the Mississippi River is closed at Louisiana, MO, where the rising river levels prevents barge passage under a bridge that spans the river. There was a significant rebound in Ohio River barge traffic, as Smithland Lock and Dam (L&D) reopened on March 9. The Smithland reopening allows continuous down-bound traffic to Olmsted L&D, which had no grain barge traffic for the last two weeks. Grain barge traffic at Olmsted for the week ending March 16 was 427 thousand tons, the highest weekly volume for 2019. However, during the same time period, there were only 466 grain barges unloaded in the New Orleans region, which have declined for five consecutive weeks and this week reached their lowest level since late May 2016. The reduced number of barges being unloaded in New Orleans is due to poor navigation conditions.

### Rail Service Disrupted by Washouts and Flooding

BNSF Railway (BNSF) and the Union Pacific Railroad (UP) continue to deal with record flooding throughout the Midwest. As a result of high water and washouts, the railroads have closed several subdivisions and issued embargoes. Outages are most severe in eastern Nebraska and western Iowa. For BNSF, track in and around Council Bluffs and Sioux City, IA, and Omaha and Lincoln, NE, remain out of service. For UP, the following routes remain closed between: (1) Missouri Valley, IA and Grand Island, NE; (2) Fremont and Lincoln, NE; and (3) Council Bluffs, IA and Kansas City, KS. The railroads are working to restore track and reroute where possible. Shippers should expect continued delays on shipments scheduled to move through impacted areas.

### Grain Inspections Continue to Decline

For the week ending March 14, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.04 million metric tons (mmt). This is a 12 percent decrease from the previous week, an 18 percent decrease from last year, and is 20 percent below the 3-year average. The drop in inspections was driven by a 42 percent decrease in wheat inspections. Shipments of wheat, primarily bound for Asia, also dropped last week. Corn inspections were down 1 percent from week-to-week, but soybean inspections were unchanged. Inspections of grain in the Mississippi Gulf were down 14 percent from the previous week, but inspections in the Pacific Northwest (PNW) increased 3 percent.

## Snapshots by Sector

### Export Sales

For the week ending March 7, **unshipped balances** of wheat, corn, and soybeans totaled 33.5 mmt. This indicates an 11 percent drop from the same time last year. Net weekly **wheat export sales** were .263 mmt, a 58 percent decrease from the previous week. Net **corn export sales** totaled .372 mmt, down 62 percent from the previous week. Net **soybean export sales** were 1.91 mmt, up notably from the past week. Net soybean sales to China accounted for 89 percent of the total net soybean sales.

### Rail

U.S. Class I railroads originated 19,218 **grain carloads** for the week ending March 9, which is down 5 percent from the previous week, 16 percent from last year, and 16 percent from the 3-year average.

Average March shuttle **secondary railcar** bids/offers (per car) were $1,617 above tariff for the week ending March 14, down $179 from last week. Average non-shuttle secondary railcar bids/offers were $400 above tariff, down $38 from last week. There were no shuttle or non-shuttle bids/offers this week last year.

### Barge

For the week ending March 16, **barge grain movements** totaled 659,690 tons. This is 82 percent higher than the previous week and 21 percent lower than the same period last year.

For the week ending March 16, 389 grain barges **moved down river.** This is 141 barges more than the previous week. There were 466 grain barges **unloaded in New Orleans**, 4 percent lower than the previous week.

### Ocean

For the week ending March 14, 30 **ocean-going grain vessels** were loaded in the Gulf. This is 19 percent less than the same period last year. Sixty-three vessels are expected to be loaded within the next 10 days, 2 percent more than the same period last year.

For the week ending March 14, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $40.00 per metric ton, unchanged from the previous week. The cost of shipping from the PNW to Japan was $23.00 per metric ton, unchanged from the previous week.

### Fuel

For the week ending March 18, the **U.S. average diesel fuel price** decreased to $3.070 per gallon, 0.9 cents below the previous week's average and 9.8 cents above the same week last year.

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# Feature Article/Calendar

## U.S. Soybean Landed Costs Fell but Mixed in Brazil

Compared to the third quarter, the landed costs for shipping soybeans from the United States to Hamburg, Germany and Shanghai, China, fell during the fourth quarter of 2018. However, changes in the landed costs of shipping soybeans from Brazil, to the same foreign markets, were mixed during the fourth quarter. Soybean landed costs from Minneapolis, MN and Davenport, IA to Hamburg, Germany both fell by 2 percent, due to reduced transportation costs and farm values. The landed costs from the same U.S. origins to Shanghai, China both fell by 1 percent. This is mainly due to reduced farm values. Similarly, the landed costs from Fargo, ND and Sioux Falls, SD to Shanghai, China fell about 0.5 and 2 percent, respectively.

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

| | 2017 4th qtr. | 2018 3rd qtr. | 2018 4th qtr. | Percent change Yr. to Yr. | Percent change Qtr. to Qtr. | 2017 4th qtr. | 2018 3rd qtr. | 2018 4th qtr. | Percent change Yr. to Yr. | Percent change Qtr. to Qtr. |
|---|---|---|---|---|---|---|---|---|---|---|
| | United States (via U.S. Gulf) | | | | | | | | | |
| | Minneapolis, MN | | | | | Davenport, IA | | | | |
| | --$/mt-- | | | | | --$/mt-- | | | | |
| Truck | 14.39 | 10.54 | 12.10 | -15.91 | 14.80 | 14.39 | 10.54 | 12.10 | -15.91 | 14.80 |
| Barge | 31.93 | 36.30 | 31.66 | -0.85 | -12.78 | 24.92 | 29.20 | 24.28 | -2.57 | -16.85 |
| Ocean[1] | 17.59 | 21.06 | 20.83 | 18.42 | -1.09 | 17.59 | 21.06 | 20.83 | 18.42 | -1.09 |
| Total transportation | 63.91 | 67.90 | 64.59 | 1.06 | -4.87 | 56.90 | 60.80 | 57.21 | 0.54 | -5.90 |
| Farm Value[2] | 332.04 | 315.38 | 312.08 | -6.01 | -1.05 | 337.55 | 317.83 | 313.55 | -7.11 | -1.35 |
| Landed Cost[3] | 395.95 | 383.28 | 376.67 | -4.87 | -1.72 | 394.45 | 378.63 | 370.76 | -6.01 | -2.08 |
| Transport % of landed cost | 16.14 | 17.72 | 17.15 | | | 14.43 | 16.06 | 15.43 | | |
| | Brazil | | | | | | | | | |
| | North MT[4] - Santos[5] | | | | | South GO[4] - Paranagua[5] | | | | |
| | --$/mt-- | | | | | --$/mt-- | | | | |
| Truck | 85.01 | 92.79 | 79.37 | -6.63 | -14.46 | 51.21 | 52.61 | 51.68 | 0.92 | -1.77 |
| Ocean[6] | 27.00 | 24.00 | 25.00 | -7.41 | 4.17 | 28.00 | 25.00 | 26.00 | -7.14 | 4.00 |
| Total transportation | 112.01 | 116.79 | 104.37 | -6.82 | -10.63 | 79.21 | 77.61 | 77.68 | -1.93 | 0.09 |
| Farm Value[7] | 296.10 | 301.39 | 293.43 | -0.90 | -2.64 | 302.26 | 302.33 | 314.40 | 4.02 | 3.99 |
| Landed Cost | 408.11 | 418.18 | 397.80 | -2.53 | -4.87 | 381.47 | 379.94 | 392.08 | 2.78 | 3.20 |
| Transport % of landed cost | 27.45 | 27.93 | 26.24 | | | 20.76 | 20.43 | 19.81 | | |

[1]Source: O'Neil Commodity Consulting

[2]Source: USDA/NASS

[3]Landed cost is total cost plus farm value

[4]Producing regions: MT= Mato Grosso, GO = Goiás

[5]Export ports

[6]Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS

[7]Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br

Note: Total may not add exactly due to rounding

Changes in Brazil's landed costs were mixed during the fourth quarter, compared to the previous quarter. The landed costs from North Mato Grosso (North MT) to Hamburg, Germany and Shanghai, China decreased, while the landed costs from South Goiás (South GO) to the same destinations increased. Both the transportation costs and farm values from North MT decreased, while those from South GO increased.

Truck and tariff rail rates increased in the United States during the fourth quarter. Ocean freight rates from the U.S. to China also increased. However, there was a decrease in barge rates, from the previous quarter. Truck rates increased during the quarter, partly due to increased demand for trucking services. Ocean freight rates for shipping bulk grains increased during the quarter. This increase was due to strong global dry bulk trades for commodities such as iron ore, coal, and other minor bulks (see February 14, 2019 *Grain Transportation Report(GTR)*). The decline in soybean movement was not offset by the increase in the corn movement which led to a reduced demand for barge services during the quarter (see December 13, 2018 *GTR*). As a result, barge rates declined. Truck rates also fell in Brazil during the quarter, while ocean freight rates increased, compared to the previous quarter.

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

| | 2017 4th qtr. | 2018 3rd qtr. | 2018 4th qtr. | Percent change Yr. to Yr. | Percent change Qtr. to Qtr. | 2017 4th qtr. | 2018 3rd qtr. | 2018 4th qtr. | Percent change Yr. to Yr. | Percent change Qtr. to Qtr. |
|---|---|---|---|---|---|---|---|---|---|---|
| | United States (via U.S. Gulf) | | | | | | | | | |
| | Minneapolis, MN | | | | | Davenport, IA | | | | |
| | --$/mt-- | | | | | --$/mt-- | | | | |
| Truck | 14.39 | 10.54 | 12.10 | -15.91 | 14.80 | 14.39 | 10.54 | 12.10 | -15.91 | 14.80 |
| Barge | 31.93 | 36.30 | 31.66 | -0.85 | -12.78 | 24.92 | 29.20 | 24.28 | -2.57 | -16.85 |
| Ocean[1] | 42.78 | 44.05 | 47.52 | 11.08 | 7.88 | 42.78 | 44.05 | 47.52 | 11.08 | 7.88 |
| Total transportation | 89.10 | 90.89 | 91.28 | 2.45 | 0.43 | 82.09 | 83.79 | 83.90 | 2.20 | 0.13 |
| Farm Value[2] | 332.04 | 315.58 | 312.08 | -6.01 | -1.11 | 337.55 | 317.83 | 313.55 | -7.11 | -1.35 |
| Landed Cost[3] | 421.14 | 406.47 | 403.36 | -4.22 | -0.77 | 419.64 | 401.62 | 397.45 | -5.29 | -1.04 |
| Transport % of landed cost | 21.16 | 22.36 | 22.63 | | | 19.56 | 20.86 | 21.11 | | |
| | Via PNW | | | | | | | | | |
| | Fargo, ND | | | | | Sioux Falls, SD | | | | |
| Truck | 14.39 | 10.54 | 12.10 | -15.91 | 14.80 | 14.39 | 10.54 | 12.10 | -15.91 | 14.80 |
| Rail[4] | 54.62 | 55.11 | 56.11 | 2.73 | 1.81 | 55.61 | 56.11 | 57.10 | 2.68 | 1.76 |
| Ocean | 24.05 | 24.26 | 25.97 | 7.98 | 7.05 | 24.05 | 24.26 | 25.97 | 7.98 | 7.05 |
| Total transportation | 93.06 | 89.91 | 94.18 | 1.20 | 4.75 | 94.05 | 90.91 | 95.17 | 1.19 | 4.69 |
| Farm Value | 324.45 | 305.95 | 299.83 | -7.59 | -2.00 | 325.30 | 306.20 | 294.81 | -9.37 | -3.72 |
| Landed Cost | 417.51 | 395.86 | 394.01 | -5.63 | -0.47 | 419.35 | 397.11 | 389.98 | -7.00 | -1.80 |
| Transport % of landed cost | 22.29 | 22.71 | 23.90 | | | 22.43 | 22.89 | 24.40 | | |
| | | | | | | | | | | |
| | Brazil | | | | | | | | | |
| | North MT[5] - Santos[6] | | | | | South GO[5] - Paranagua[6] | | | | |
| | --$/mt-- | | | | | --$/mt-- | | | | |
| Truck | 85.01 | 92.79 | 79.37 | -6.63 | -14.46 | 51.21 | 52.61 | 51.68 | 0.92 | -1.77 |
| Ocean[7] | 30.00 | 27.75 | 30.00 | 0.00 | 8.11 | 31.50 | 28.75 | 31.00 | -1.59 | 7.83 |
| Total transportation | 115.01 | 120.54 | 109.37 | -4.90 | -9.27 | 82.71 | 81.36 | 82.68 | -0.04 | 1.62 |
| Farm Value[8] | 296.10 | 301.39 | 293.43 | -0.90 | -2.64 | 302.26 | 302.33 | 314.40 | 4.02 | 3.99 |
| Landed Cost | 411.11 | 421.93 | 402.80 | -2.02 | -4.53 | 384.97 | 383.69 | 397.08 | 3.15 | 3.49 |
| Transport % of landed cost | 27.98 | 28.57 | 27.15 | | | 21.48 | 21.20 | 20.82 | | |

[1]Source: O'Neil Commodity Consulting

[2]Source: USDA/NASS

[3]Landed cost is transportation cost plus farm value

[4]Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary rail markets, which could exceed the rail tariff rate plus fuel surcharge shown in the table.

[5]Producing regions: MT = Mato Grosso, GO = Goiás

[6]Export ports

[7]Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS

[8]Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br

Note: Total may not add exactly due to rounding

Generally, year-to-year transportation costs increased in the United States but declined in Brazil. U.S. soybean farm values fell from year to year. Year-to-year changes in Brazil's farm values were mixed. Farm values declined in North MT and increased in South GO, compared to the previous year. Soybean landed costs from the United States to Europe, ranged from $371 to $377 per metric ton (mt) (Table1), and $390 to $403 per mt to China (Table 2). Brazil's landed costs to Europe ranged from $392 to $398 to Europe (Table 1) and $397 to $403 to China (Table 2). The U.S. transportation share of the landed costs ranged from 15 to 17 percent to Hamburg, Germany (Table 1) and 21 to 24 percent to Shanghai, China (Table 2). Brazil's transportation share of the landed costs ranged from 20 to 26 percent to Hamburg, Germany (Table 1) and 21 to 27 percent to Shanghai, China (Table 2).

According to the USDA's grain inspection data, China imported 0.32 million metric tons (mmt) of U.S. soybeans during the fourth quarter of 2018, compared to 16.46 mmt during the same period in 2017. Overall, China imported a total of 8.21 mmt of U.S. soybeans in 2018, compared to 30.61 mmt in 2017—a decrease of 22.4 mmt. The significant drop in China's soybean imports also effected U.S. soybean prices (see October 11, 2018 *GTR* and February 28, 2019, *GTR*). Lower U.S. farm prices contributed to the decline in soybean landed costs, which may boost the competitiveness of soybeans and U.S. exports in the long term. *surajudeen.olowolayemo@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 |
| 03/20/19 | 206 | 302 | 289 | 261 | 179 | 163 |
| 03/13/19 | 207 | 304 | 297 | 275 | 179 | 163 |

[1]Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = near-month secondary rail market bid and monthly tariff rate with fuel surcharge ($/car); barge = Illinois River barge rate (index = percent of tariff rate); and ocean = routes to Japan ($/metric ton)

Source: Transportation & Marketing Program/AMS/USDA

Table 2

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

| Commodity | Origin--Destination | 3/15/2019 | 3/8/2019 |
|---|---|---|---|
| Corn | IL--Gulf | -0.80 | -0.79 |
| Corn | NE--Gulf | -0.85 | -0.85 |
| Soybean | IA--Gulf | -1.22 | -1.22 |
| HRW | KS--Gulf | -1.62 | -1.66 |
| HRS | ND--Portland | -1.95 | -2.54 |

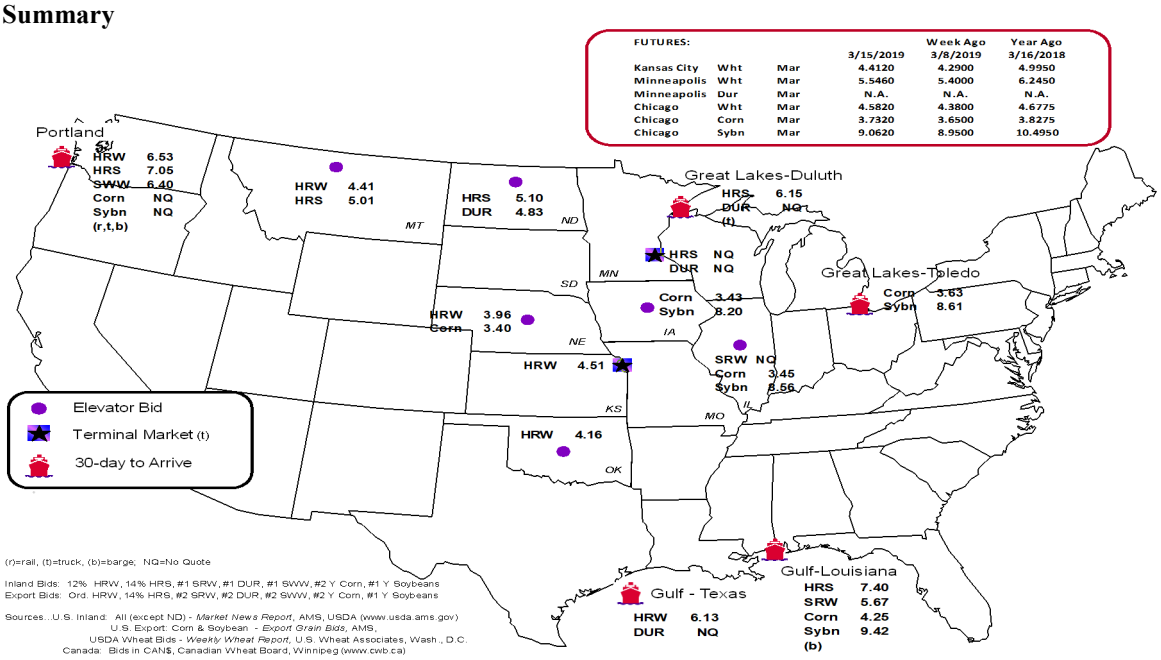
Note: nq = no quote; n/a = not available

Source: Transportation & Marketing Program/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1

**Grain Bid Summary**



# Rail Transportation

Table 3

**Rail Deliveries to Port (carloads)[1]**

| For the Week Ending | Mississippi Gulf | Texas Gulf | Pacific Northwest | Atlantic & East Gulf | Total | Week ending | Cross-Border Mexico[3] |
|---|---|---|---|---|---|---|---|
| 3/13/2019[p] | 541 | 491 | 5,866 | 397 | 7,295 | 3/9/2019 | 1,895 |
| 3/06/2019[r] | 1,340 | 907 | 5,352 | 280 | 7,879 | 3/2/2019 | 1,584 |
| 2019 YTD[r] | 7,091 | 11,620 | 57,663 | 4,282 | 80,656 | 2019 YTD | 25,261 |
| 2018 YTD[r] | 5,126 | 17,545 | 68,391 | 3,015 | 94,077 | 2018 YTD | 19,056 |
| 2019 YTD as % of 2018 YTD | 138 | 66 | 84 | 142 | 86 | % change YTD | 133 |
| Last 4 weeks as % of 2018[2] | 286 | 71 | 85 | 99 | 90 | Last 4wks % 2018 | 108 |
| Last 4 weeks as % of 4-year avg.[2] | 182 | 69 | 87 | 66 | 88 | Last 4wks % 4 yr | 103 |
| Total 2018 | 22,118 | 46,532 | 310,449 | 21,432 | 400,531 | Total 2018 | 129,116 |
| Total 2017 | 28,796 | 75,543 | 287,267 | 21,312 | 412,918 | Total 2017 | 119,661 |

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2018 and prior 4-year average.

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

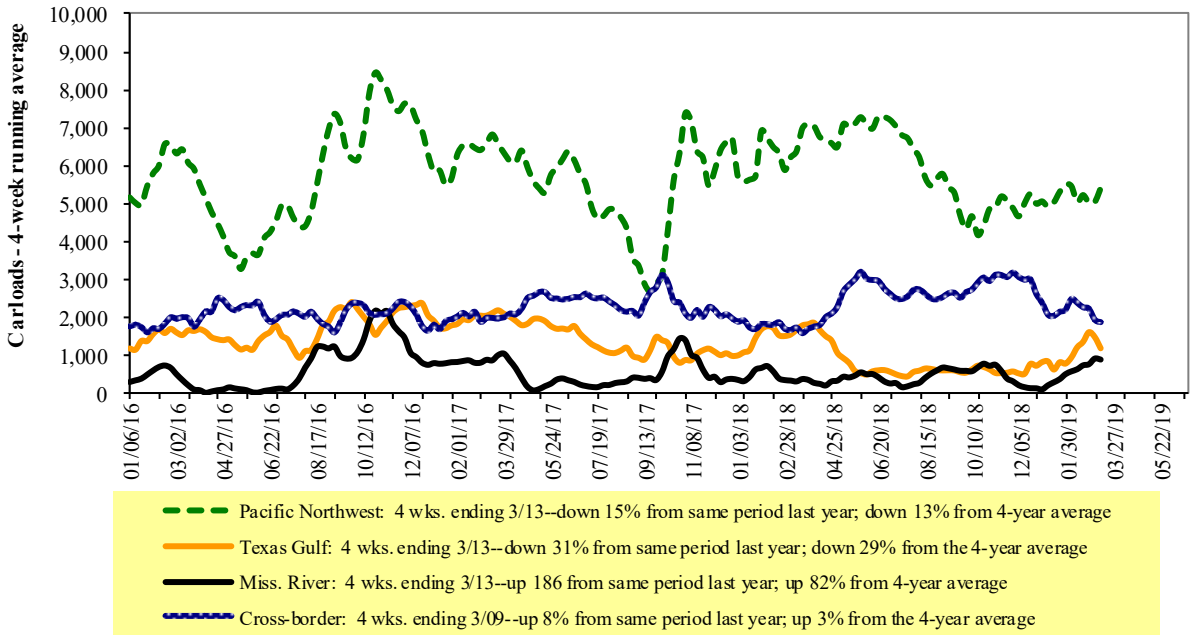
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

Source: Transportation & Marketing Program/AMS/USDA

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

Figure 2

**Rail Deliveries to Port**




Source: Transportation & Marketing Program/AMS/USDA

Table 4

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

| For the week ending: | East | | West | | | U.S. total | Canada | |
|---|---|---|---|---|---|---|---|---|
| 3/9/2019 | CSXT | NS | BNSF | KCS | UP | | CN | CP |
| This week | 1,921 | 2,375 | 8,553 | 1,440 | 4,929 | 19,218 | 3,613 | 3,161 |
| This week last year | 1,711 | 2,305 | 13,205 | 816 | 4,898 | 22,935 | 3,559 | 4,746 |
| 2019 YTD | 19,246 | 26,224 | 106,798 | 11,133 | 50,892 | 214,293 | 39,062 | 38,791 |
| 2018 YTD | 17,804 | 24,315 | 115,992 | 9,656 | 51,200 | 218,967 | 33,265 | 42,047 |
| 2019 YTD as % of 2018 YTD | 108 | 108 | 92 | 115 | 99 | 98 | 117 | 92 |
| Last 4 weeks as % of 2018* | 111 | 105 | 85 | 132 | 96 | 94 | 129 | 89 |
| Last 4 weeks as % of 3-yr avg.** | 106 | 100 | 88 | 134 | 87 | 92 | 115 | 88 |
| Total 2018 | 98,978 | 133,082 | 635,458 | 48,638 | 267,713 | 1,183,869 | 211,855 | 244,697 |

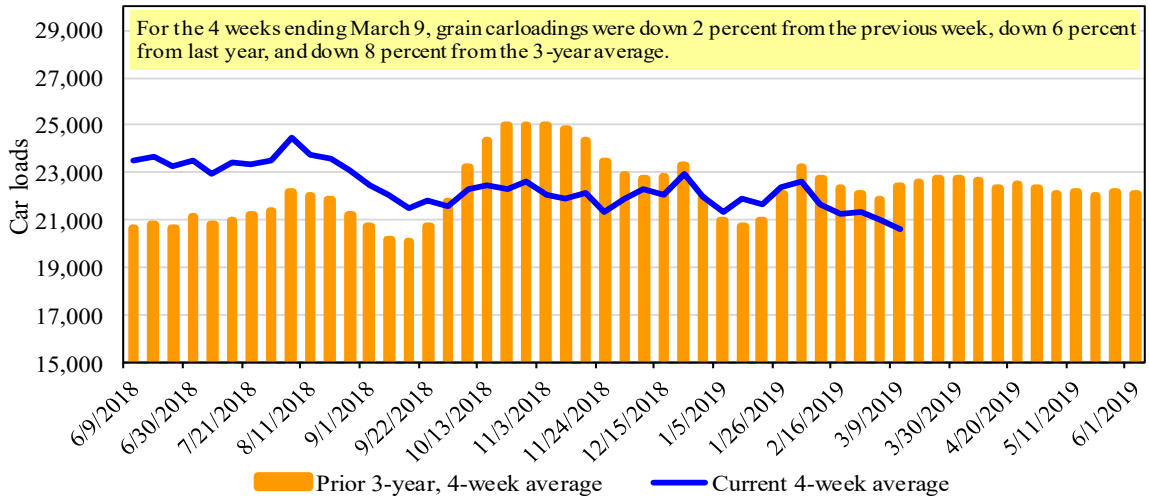
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: | | Delivery period | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 3/14/2019 | | Mar-19 | Mar-18 | Apr-19 | Apr-18 | May-19 | May-18 | Jun-19 | Jun-18 |
| BNSF[3] | COT grain units | n/a | n/a | n/a | 0 | n/a | 0 | n/a | no bids |
| | COT grain single-car[5] | n/a | n/a | n/a | 144 | n/a | 2 | n/a | 0 |
| UP[4] | GCAS/Region 1 | no offer | n/a | no offer | 10 | no offer | 10 | n/a | no bids |
| | GCAS/Region 2 | no offer | n/a | no offer | no offer | 10 | 18 | n/a | no bids |

[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.

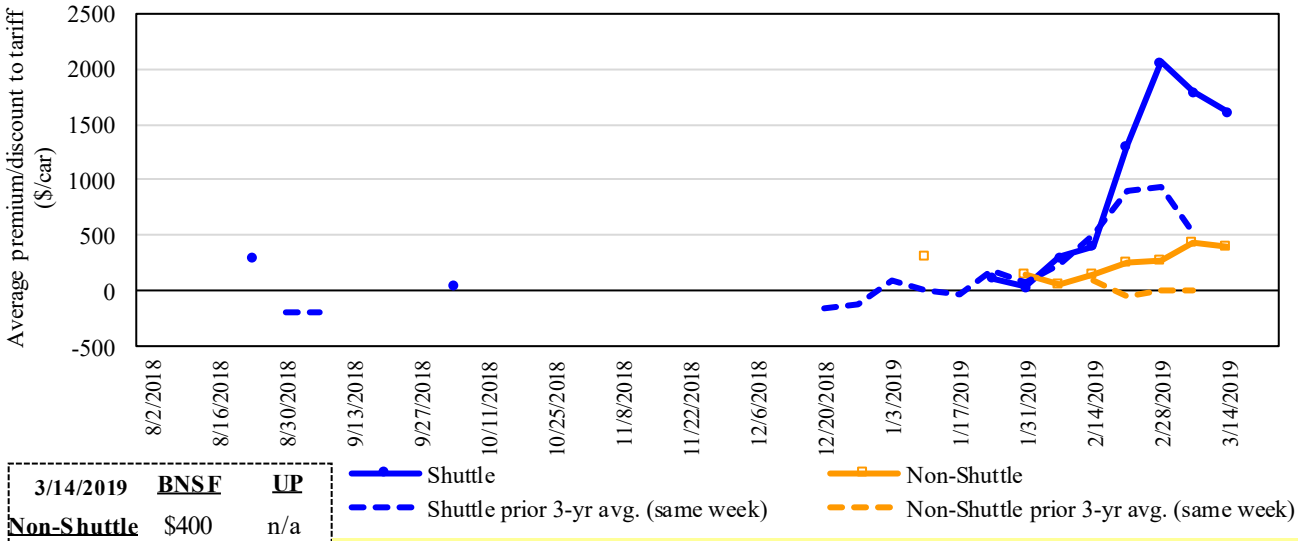
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

[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 March 2019, Secondary Market**

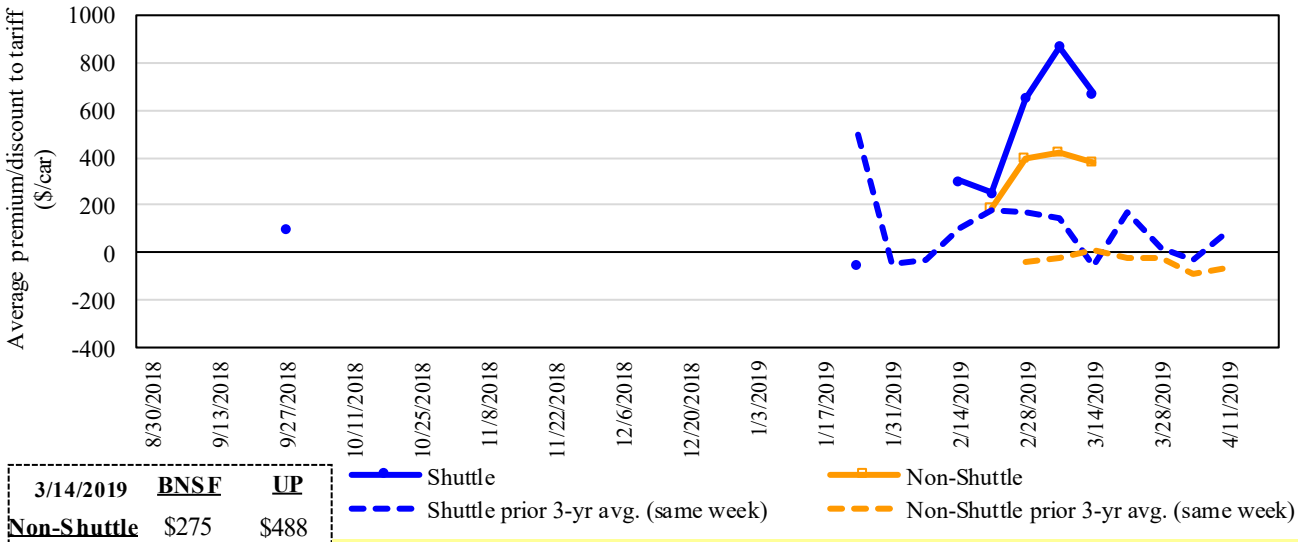



| 3/14/2019 | BNSF | UP |
|---|---|---|
| Non-Shuttle | $400 | n/a |
| Shuttle | $2,333 | $900 |

Average Non-shuttle bids/offers fell $38 this week, and are $38 below the peak.
Average Shuttle bids/offers fell $179 this week and are $444 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 April 2019, Secondary Market**



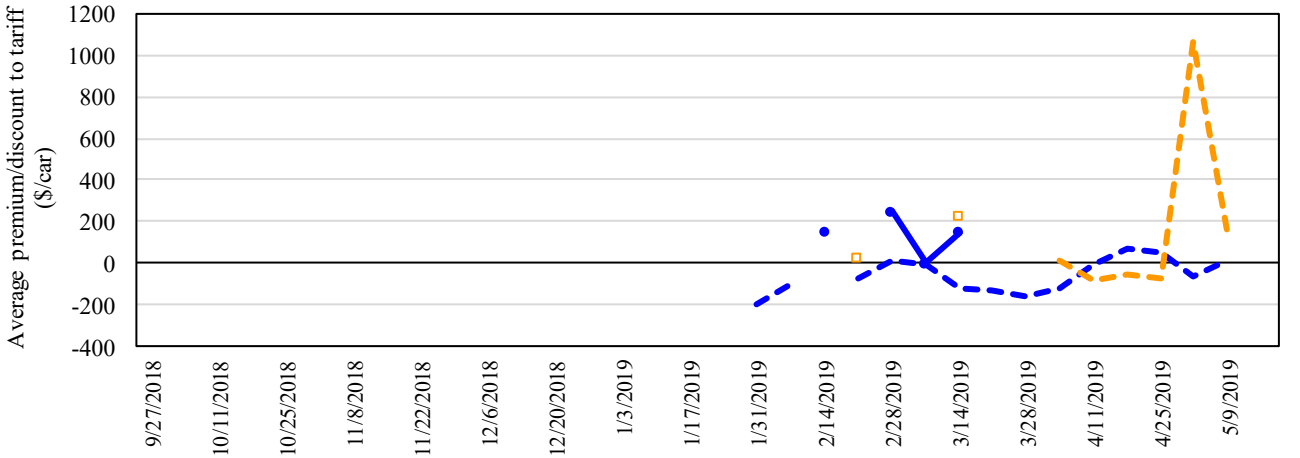

| 3/14/2019 | BNSF | UP |
|---|---|---|
| Non-Shuttle | $275 | $488 |
| Shuttle | $992 | $350 |

Average Non-shuttle bids/offers fell $44 this week, and are $44 below the peak.
Average Shuttle bids/offers fell $196 this week and are $196 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 May 2019, Secondary Market**




| 3/14/2019 | BNSF | UP |
|---|---|---|
| Non-Shuttle | $150 | $300 |
| Shuttle | $200 | $100 |

There were no Non-Shuttle bids/offers last week. Average Non-Shuttle bids/offers this week are at the peak. Average Shuttle bids/offers rose $150 this week and are $100 below the peak.

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: 3/14/2019 | Delivery period | | | | | |
|---|---|---|---|---|---|---|---|
| | | Mar-19 | Apr-19 | May-19 | Jun-19 | Jul-19 | Aug-19 |
| Non-shuttle | **BNSF-GF** | **400** | **275** | **150** | **n/a** | **n/a** | **n/a** |
| | Change from last week | 125 | (25) | n/a | n/a | n/a | n/a |
| | Change from same week 2018 | n/a | n/a | n/a | n/a | n/a | n/a |
| | **UP-Pool** | **n/a** | **488** | **300** | **n/a** | **n/a** | **n/a** |
| | Change from last week | n/a | (63) | n/a | n/a | n/a | n/a |
| | Change from same week 2018 | n/a | n/a | n/a | n/a | n/a | n/a |
| Shuttle | **BNSF-GF** | **2333** | **992** | **200** | **n/a** | **n/a** | **n/a** |
| | Change from last week | (342) | (391) | n/a | n/a | n/a | n/a |
| | Change from same week 2018 | n/a | 692 | n/a | n/a | n/a | n/a |
| | **UP-Pool** | **900** | **350** | **100** | **n/a** | **n/a** | **n/a** |
| | Change from last week | (17) | 0 | 100 | n/a | n/a | n/a |
| | Change from same week 2018 | n/a | 175 | 175 | 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

Data from James B. Joiner Co., Tradewest Brokerage Co.

Source: Transportation and Marketing Program/AMS/USDA

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]**

| March, 2019 | 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 | $91 | $40.46 | $1.10 | 2 |
| | 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 | $160 | $46.68 | $1.27 | 0 |
| | Sioux Falls, SD | Galveston-Houston, TX | $6,911 | $0 | $68.63 | $1.87 | 2 |
| | Northwest KS | Galveston-Houston, TX | $4,816 | $176 | $49.57 | $1.35 | 0 |
| | Amarillo, TX | Los Angeles, CA | $5,121 | $244 | $53.28 | $1.45 | 2 |
| Corn | Champaign-Urbana, IL | New Orleans, LA | $4,000 | $181 | $41.52 | $1.05 | 1 |
| | Toledo, OH | Raleigh, NC | $6,581 | $0 | $65.35 | $1.66 | 4 |
| | Des Moines, IA | Davenport, IA | $2,258 | $38 | $22.80 | $0.58 | 0 |
| | 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 | $113 | $36.96 | $0.94 | 0 |
| | Des Moines, IA | Los Angeles, CA | $5,327 | $328 | $56.16 | $1.43 | 0 |
| Soybeans | Minneapolis, MN | New Orleans, LA | $4,131 | $171 | $42.72 | $1.16 | 0 |
| | 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 | $181 | $48.92 | $1.33 | 0 |
| **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 | $288 | $61.57 | $1.68 | 1 |
| 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 | $181 | $39.53 | $1.00 | 2 |
| | Lincoln, NE | Galveston-Houston, TX | $3,880 | $0 | $38.53 | $0.98 | 5 |
| | Des Moines, IA | Amarillo, TX | $4,060 | $142 | $41.72 | $1.06 | 2 |
| | 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 | $209 | $49.49 | $1.35 | 0 |
| | Toledo, OH | Huntsville, AL | $4,634 | $0 | $46.02 | $1.25 | 6 |
| | Grand Island, NE | Portland, OR | $5,710 | $295 | $59.63 | $1.62 | 0 |

[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: March, 2019 | | | | | | | |
|---|---|---|---|---|---|---|---|
| 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 | $125 | $70.18 | $1.91 | 2 |
| | KS | Guadalajara, JA | $7,371 | $456 | $79.97 | $2.17 | 3 |
| | TX | Salinas Victoria, NL | $4,329 | $77 | $45.02 | $1.22 | 1 |
| Corn | IA | Guadalajara, JA | $8,528 | $388 | $91.10 | $2.31 | 4 |
| | SD | Celaya, GJ | $7,880 | $0 | $80.51 | $2.04 | 2 |
| | NE | Queretaro, QA | $8,207 | $265 | $86.56 | $2.20 | 2 |
| | SD | Salinas Victoria, NL | $6,905 | $0 | $70.55 | $1.79 | 2 |
| | MO | Tlalnepantla, EM | $7,573 | $258 | $80.02 | $2.03 | 2 |
| | SD | Torreon, CU | $7,480 | $0 | $76.43 | $1.94 | 2 |
| Soybeans | MO | Bojay (Tula), HG | $8,284 | $361 | $88.33 | $2.40 | 3 |
| | NE | Guadalajara, JA | $8,842 | $387 | $94.29 | $2.56 | 3 |
| | IA | El Castillo, JA | $9,110 | $0 | $93.08 | $2.53 | 2 |
| | KS | Torreon, CU | $7,714 | $275 | $81.62 | $2.22 | 4 |
| Sorghum | NE | Celaya, GJ | $7,527 | $350 | $80.48 | $2.04 | 4 |
| | KS | Queretaro, QA | $8,000 | $157 | $83.34 | $2.11 | 2 |
| | NE | Salinas Victoria, NL | $6,633 | $126 | $69.05 | $1.75 | 3 |
| | NE | Torreon, CU | $6,962 | $256 | $73.75 | $1.87 | 3 |

[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

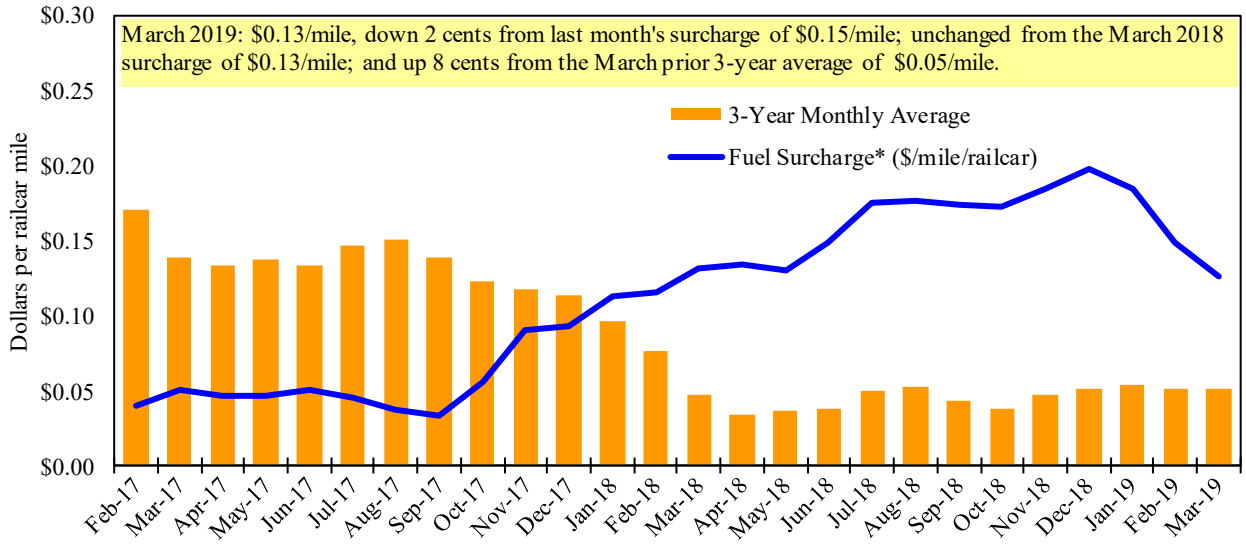
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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

Figure 7

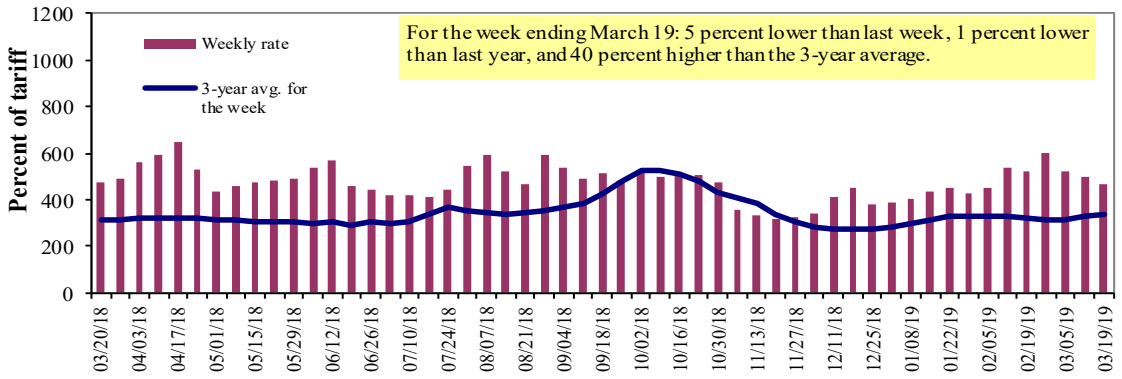
## Railroad Fuel Surcharges, North American Weighted Average[1]




[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]** | 3/19/2019 | - | - | 470 | 370 | 450 | 450 | 363 |
| | 3/12/2019 | - | - | 495 | 400 | 513 | 513 | 360 |
| **$/ton** | 3/19/2019 | - | - | 21.81 | 14.76 | 21.11 | 18.18 | 11.40 |
| | 3/12/2019 | - | - | 22.97 | 15.96 | 24.06 | 20.73 | 11.30 |
| **Current week % change from the same week:** | | | | | | | | |
| | Last year | - | - | -1 | 6 | 3 | 3 | 9 |
| | 3-year avg. [2] | - | - | 40 | 48 | 49 | 50 | 64 |
| **Rate[1]** | April | - | 475 | 450 | 353 | 395 | 395 | 345 |
| | June | 475 | 425 | 423 | 320 | 363 | 363 | 314 |

[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.

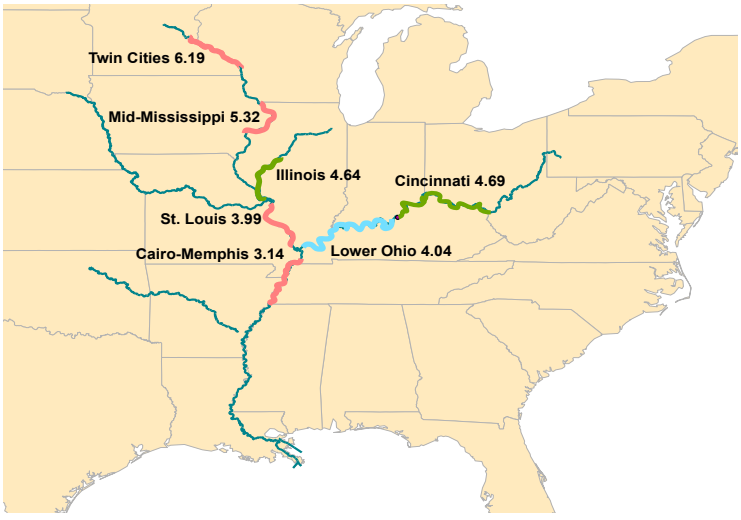
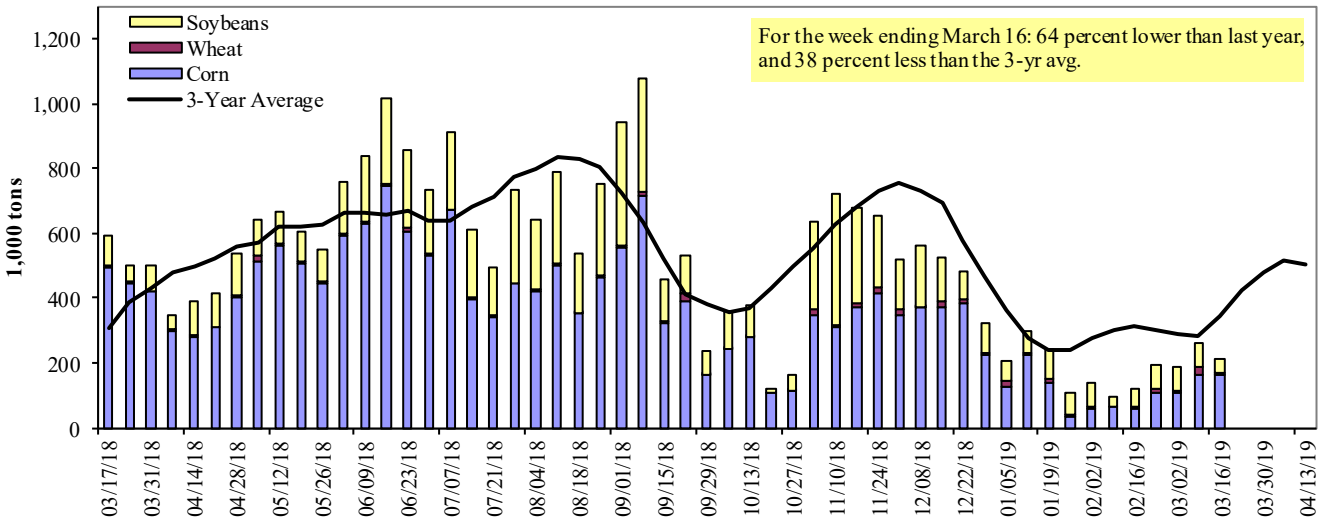


Figure 10

## 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 03/16/2019 | Corn | Wheat | Soybeans | Other | Total |
|---|---|---|---|---|---|
| **Mississippi River** | | | | | |
| Rock Island, IL (L15) | 0 | 0 | 0 | 0 | 0 |
| Winfield, MO (L25) | 10 | 0 | 0 | 0 | 10 |
| Alton, IL (L26) | 151 | 3 | 40 | 0 | 195 |
| Granite City, IL (L27) | 164 | 3 | 45 | 0 | 212 |
| **Illinois River (L8)** | 175 | 3 | 38 | 0 | 217 |
| **Ohio River (OLMSTED)** | 177 | 56 | 194 | 0 | 427 |
| **Arkansas River (L1)** | 0 | 6 | 15 | 0 | 21 |
| | | | | | |
| Weekly total - 2019 | 341 | 65 | 254 | 0 | 660 |
| Weekly total - 2018 | 618 | 32 | 181 | 7 | 839 |
| 2019 YTD[1] | 2,152 | 459 | 2,129 | 27 | 4,767 |
| 2018 YTD[1] | 2,865 | 283 | 2,345 | 35 | 5,527 |
| 2019 as % of 2018 YTD | 75 | 162 | 91 | 79 | 86 |
| Last 4 weeks as % of 2018[2] | 57 | 192 | 129 | 157 | 82 |
| Total 2018 | 23,349 | 1,674 | 12,819 | 133 | 37,975 |

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

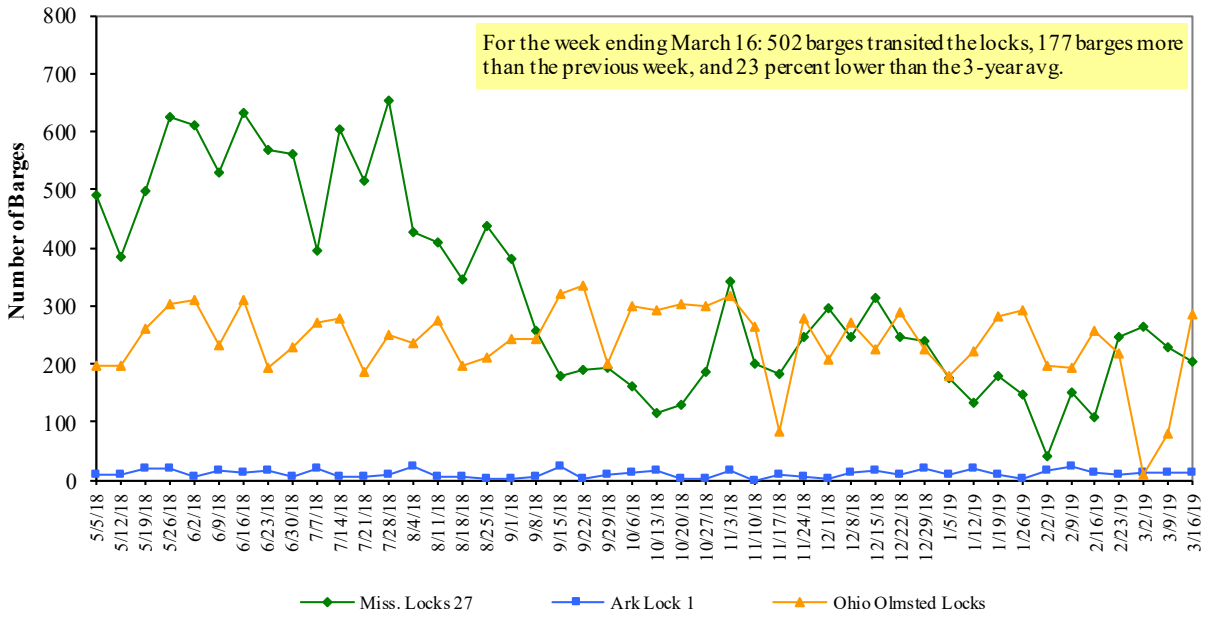
[2] As a percent of same period in 2018.

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

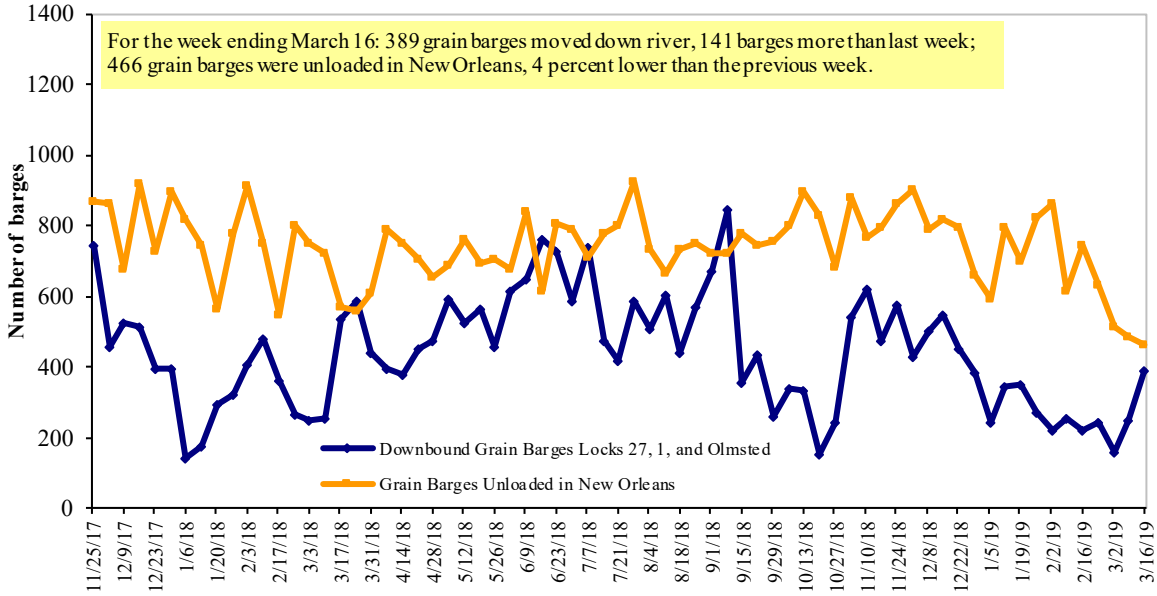
**Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam**




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 3/18/2019 (US $/gallon)**

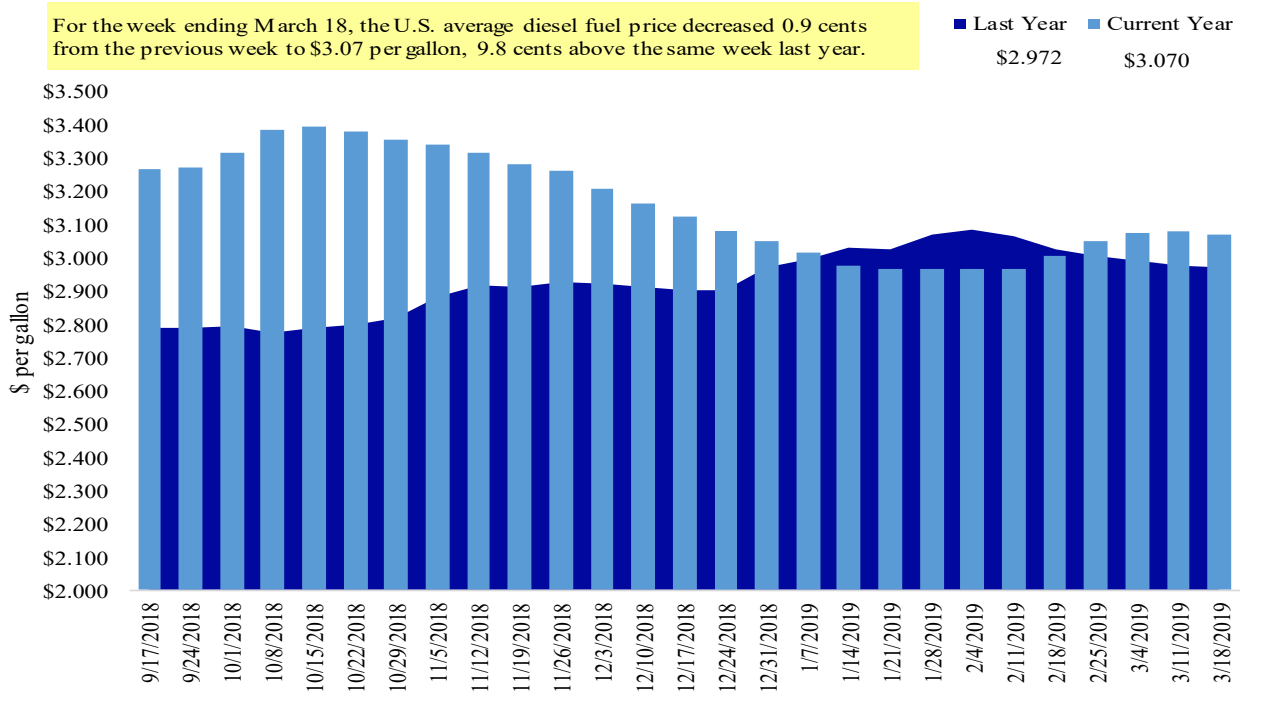
| Region | Location | Price | Change from Week ago | Change from Year ago |
|---|---|---|---|---|
| I | East Coast | 3.124 | 0.001 | 0.115 |
| | New England | 3.200 | 0.017 | 0.099 |
| | Central Atlantic | 3.313 | -0.002 | 0.113 |
| | Lower Atlantic | 2.981 | 0.000 | 0.123 |
| II | Midwest | 2.992 | -0.019 | 0.094 |
| III | Gulf Coast | 2.869 | -0.012 | 0.083 |
| IV | Rocky Mountain | 2.944 | 0.005 | 0.019 |
| V | West Coast | 3.497 | -0.008 | 0.113 |
| | West Coast less California | 3.139 | -0.023 | 0.079 |
| | California | 3.781 | 0.003 | 0.140 |
| Total | U.S. | 3.070 | -0.009 | 0.098 |

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

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] | | | | | | | | | |
| 3/7/2019 | 2,425 | 881 | 1,374 | 1,037 | 110 | 5,828 | 13,843 | 13,805 | 33,475 |
| This week year ago | 1,358 | 636 | 1,423 | 1,015 | 95 | 4,528 | 23,420 | 9,608 | 37,555 |
| **Cumulative exports-marketing year**[2] | | | | | | | | | |
| 2018/19 YTD | 5,538 | 2,121 | 5,000 | 3,998 | 360 | 17,017 | 27,055 | 27,378 | 71,450 |
| 2017/18 YTD | 7,374 | 1,710 | 4,356 | 3,945 | 276 | 17,661 | 20,212 | 39,667 | 77,540 |
| YTD 2018/19 as % of 2017/18 | 75 | 124 | 115 | 101 | 130 | 96 | 134 | 69 | 92 |
| Last 4 wks as % of same period 2017/18 | 186 | 149 | 101 | 119 | 121 | 138 | 59 | 139 | 89 |
| 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 3/07/2019 | Total Commitments[2] | | % change | Exports[3] |
|---|---|---|---|---|
| | 2018/19 | 2017/18 | current MY | 3-year avg |
| | Current MY | Last MY | from last MY | 2015-2017 |
| | - 1,000 mt - | | | |
| Mexico | 13,329 | 11,511 | 16 | 13,691 |
| Japan | 8,514 | 7,928 | 7 | 11,247 |
| Korea | 3,208 | 2,574 | 25 | 4,754 |
| Colombia | 3,241 | 2,998 | 8 | 4,678 |
| Peru | 1,877 | 2,196 | (15) | 2,975 |
| **Top 5 Importers** | **30,169** | **27,206** | **11** | **37,344** |
| **Total US corn export sales** | **40,898** | **43,631** | **(6)** | **53,184** |
| % of Projected | 66% | 70% | | |
| Change from prior week[2] | **372** | **2,505** | | |
| **Top 5 importers' share of U.S. corn export sales** | 74% | 62% | | 70% |
| **USDA forecast, March 2019** | **62,341** | **62,036** | **0** | |
| **Corn Use for Ethanol USDA forecast, March 2019** | **140,970** | **142,367** | **(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 3/07/2019 | 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 | 11,076 | 28,202 | (61) | 31,228 |
| Mexico | 4,599 | 3,558 | 29 | 3,716 |
| Indonesia | 1,540 | 1,336 | 15 | 2,250 |
| Japan | 1,828 | 1,560 | 17 | 2,145 |
| Netherlands | 1,692 | 925 | 83 | 2,209 |
| **Top 5 importers** | **20,734** | **35,581** | **(42)** | **41,549** |
| **Total US soybean export sales** | **41,182** | **49,275** | **(16)** | **55,113** |
| % of Projected | 81% | 85% | | |
| Change from prior week[2] | **1,912** | **1,270** | | |
| **Top 5 importers' share of U.S. soybean export sales** | 50% | 72% | | **75%** |
| **USDA forecast, March 2019** | **51,090** | **58,011** | **88** | |

(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 3/07/2019 | 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 | 2,723 | 2,780 | (2) | 2,781 |
| Japan | 2,542 | 2,631 | (3) | 2,649 |
| Philippines | 2,890 | 2,461 | 17 | 2,441 |
| Korea | 1,478 | 1,401 | 6 | 1,257 |
| Nigeria | 1,417 | 1,061 | 34 | 1,254 |
| Indonesia | 1,132 | 1,164 | (3) | 1,076 |
| Taiwan | 1,067 | 1,010 | 6 | 1,066 |
| China | 42 | 926 | (95) | 944 |
| Colombia | 585 | 289 | 103 | 714 |
| Thailand | 742 | 630 | 18 | 618 |
| **Top 10 importers** | **14,617** | **14,353** | 2 | **14,800** |
| **Total US wheat export sales** | **22,845** | **22,190** | **3** | **22,869** |
| % of Projected | 87% | 90% | | |
| Change from prior week[2] | **263** | **163** | | |
| **Top 10 importers' share of U.S. wheat export sales** | 64% | 65% | | 65% |
| **USDA forecast, March 2019** | **26,294** | **24,550** | **7** | |

(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 03/14/19 | Previous Week* | Current Week as % of Previous | 2019 YTD* | 2018 YTD* | 2019 YTD as % of 2018 YTD | Last 4-weeks as % of: Last Year | Last 4-weeks as % of: Prior 3-yr. avg. | 2018 Total* |
|---|---|---|---|---|---|---|---|---|---|
| **Pacific Northwest** | | | | | | | | | |
| Wheat | 179 | 299 | 60 | 2,723 | 2,315 | 118 | 155 | 121 | 13,315 |
| Corn | 235 | 158 | 149 | 2,174 | 3,268 | 67 | 41 | 54 | 20,024 |
| Soybeans | 283 | 221 | 128 | 2,833 | 3,236 | 88 | 138 | 138 | 7,719 |
| **Total** | **697** | **678** | **103** | **7,730** | **8,819** | **88** | **95** | **100** | **41,058** |
| **Mississippi Gulf** | | | | | | | | | |
| Wheat | 82 | 146 | 56 | 1,080 | 914 | 118 | 118 | 108 | 3,896 |
| Corn | 404 | 462 | 87 | 5,252 | 5,918 | 89 | 66 | 65 | 33,735 |
| Soybeans | 450 | 483 | 93 | 6,571 | 6,916 | 95 | 117 | 110 | 28,124 |
| **Total** | **935** | **1,091** | **86** | **12,903** | **13,748** | **94** | **88** | **85** | **65,755** |
| **Texas Gulf** | | | | | | | | | |
| Wheat | 78 | 174 | 45 | 1,180 | 1,083 | 109 | 145 | 131 | 3,198 |
| Corn | 22 | 31 | 71 | 116 | 98 | 118 | 149 | 84 | 730 |
| Soybeans | 0 | 0 | n/a | 0 | 0 | n/a | n/a | n/a | 69 |
| **Total** | **100** | **205** | **49** | **1,296** | **1,182** | **110** | **145** | **126** | **3,997** |
| **Interior** | | | | | | | | | |
| Wheat | 26 | 25 | 103 | 318 | 356 | 89 | 83 | 83 | 1,614 |
| Corn | 113 | 139 | 82 | 1,386 | 1,388 | 100 | 112 | 102 | 8,650 |
| Soybeans | 90 | 156 | 58 | 1,319 | 1,210 | 109 | 101 | 124 | 6,729 |
| **Total** | **230** | **319** | **72** | **3,023** | **2,954** | **102** | **104** | **108** | **16,993** |
| **Great Lakes** | | | | | | | | | |
| Wheat | 8 | 0 | n/a | 30 | 19 | 157 | n/a | 349 | 894 |
| Corn | 0 | 0 | n/a | 0 | 0 | n/a | n/a | n/a | 404 |
| Soybeans | 0 | 0 | n/a | 16 | 0 | n/a | n/a | n/a | 1,192 |
| **Total** | **8** | **0** | **n/a** | **47** | **19** | **242** | **n/a** | **349** | **2,491** |
| **Atlantic** | | | | | | | | | |
| Wheat | 0 | 0 | n/a | 1 | 29 | 2 | 2 | 3 | 69 |
| Corn | 7 | 0 | n/a | 35 | 0 | n/a | n/a | 463 | 138 |
| Soybeans | 63 | 22 | 285 | 328 | 488 | 67 | 84 | 95 | 2,047 |
| **Total** | **70** | **22** | **317** | **363** | **517** | **70** | **78** | **90** | **2,253** |
| **U.S. total from ports*** | | | | | | | | | |
| Wheat | 372 | 644 | 58 | 5,332 | 4,717 | 113 | 137 | 118 | 22,986 |
| Corn | 781 | 789 | 99 | 8,962 | 10,672 | 84 | 63 | 67 | 63,682 |
| Soybeans | 886 | 882 | 100 | 11,067 | 11,851 | 93 | 119 | 119 | 45,879 |
| **Total** | **2,039** | **2,315** | **88** | **25,362** | **27,240** | **93** | **94** | **94** | **132,547** |

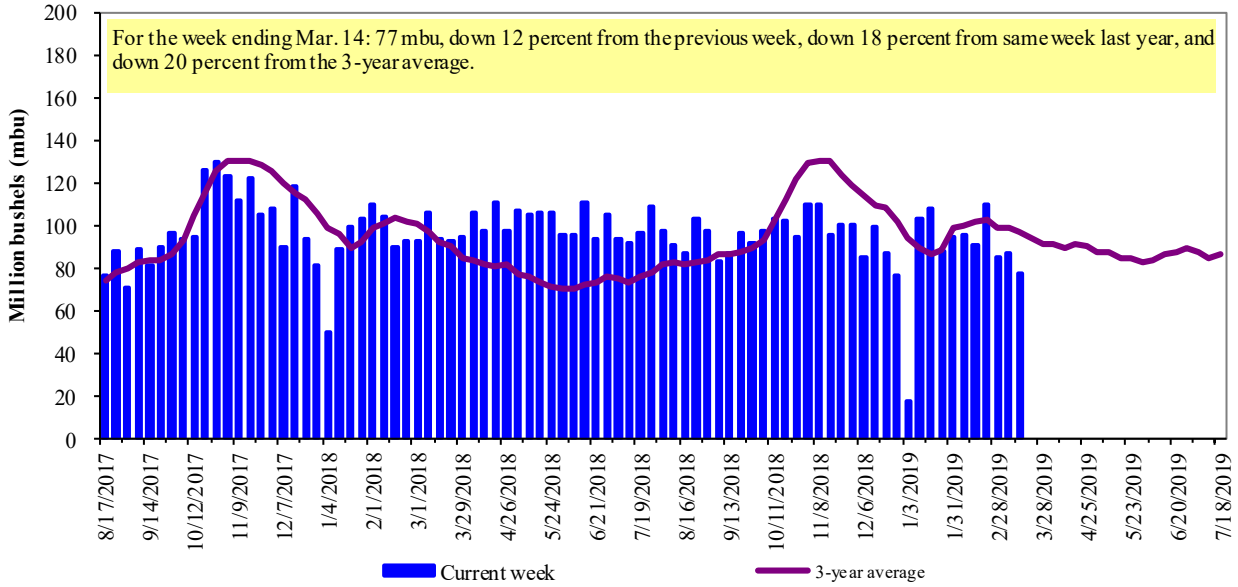
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

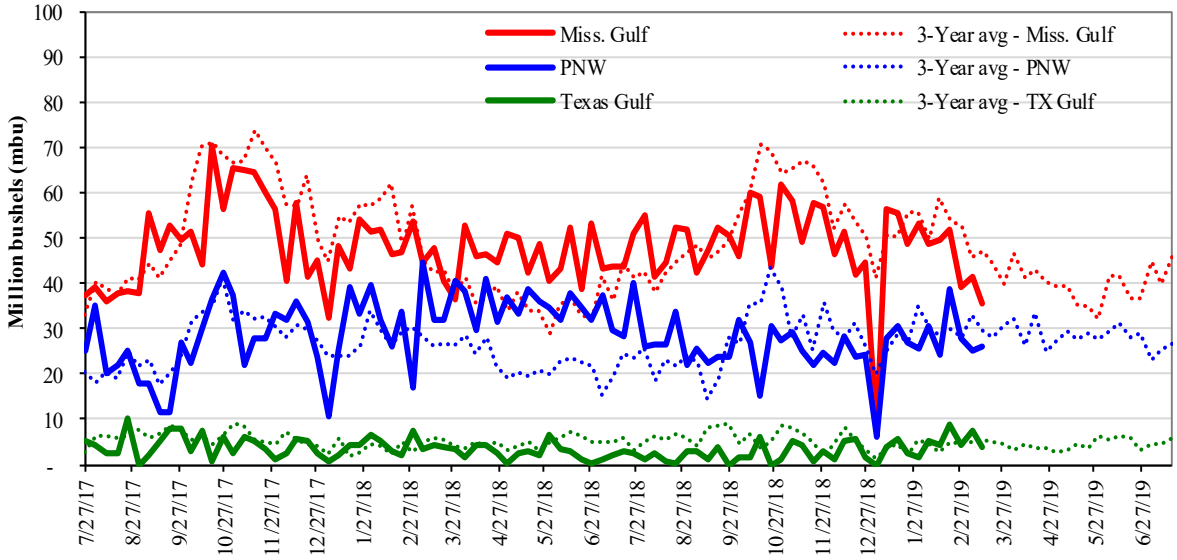
## U.S. grain inspected for export (wheat, corn, and soybeans)




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 03/14/19 inspections (mbu): | |
|---|---|
| Mississippi Gulf: | 35.4 |
| PNW: | 26.2 |
| Texas Gulf: | 3.7 |

| Percent change from: | MS Gulf | TX Gulf | U.S. Gulf | PNW |
|---|---|---|---|---|
| Last Week: | down 14 | down 51 | down 20 | up 4 |
| Last Year (same week): | down 26 | down 11 | down 25 | down 18 |
| 3-yr avg. (4-wk.mov. Avg): | down 29 | down 26 | down 29 | down 13 |

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

Table 17

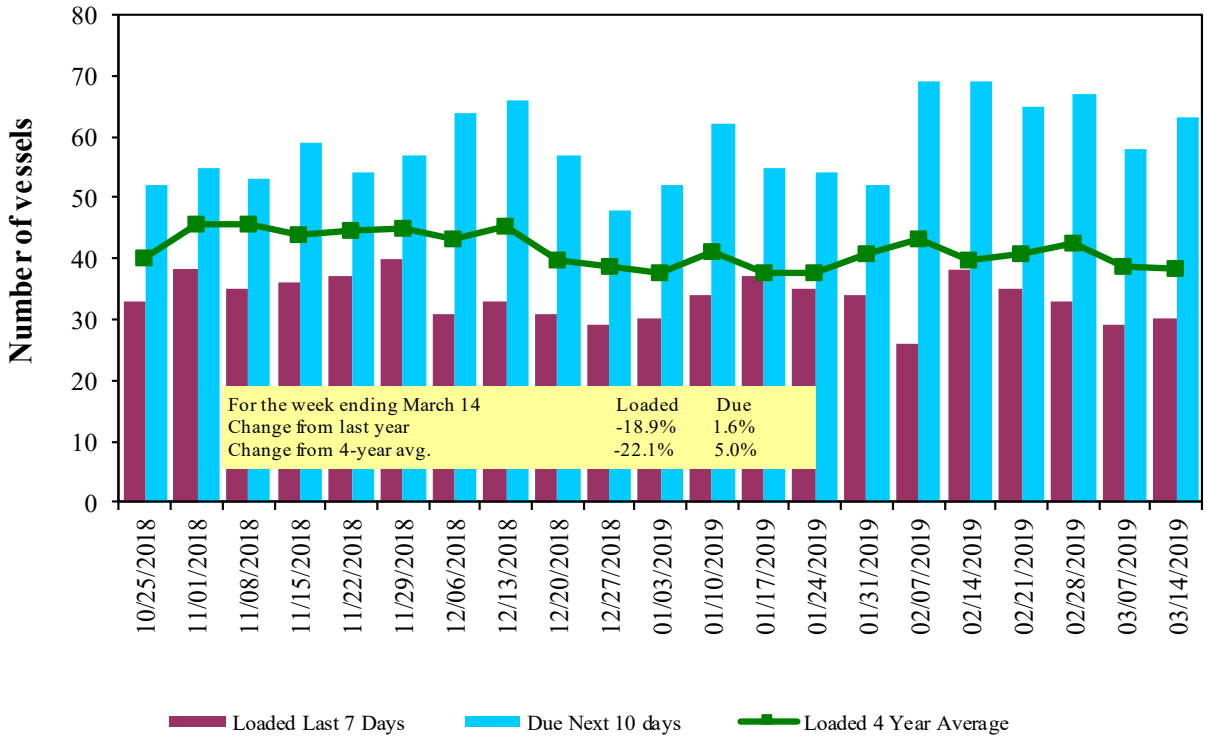
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

| | Gulf | | | Pacific Northwest |
|---|---|---|---|---|
| Date | In port | Loaded 7-days | Due next 10-days | In port |
| 3/14/2019 | 47 | 30 | 63 | 28 |
| 3/7/2019 | 47 | 29 | 58 | 28 |
| 2018 range | (23..88) | (24..41) | (38..67) | (4..30) |
| 2018 avg. | 40 | 34 | 54 | 17 |

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

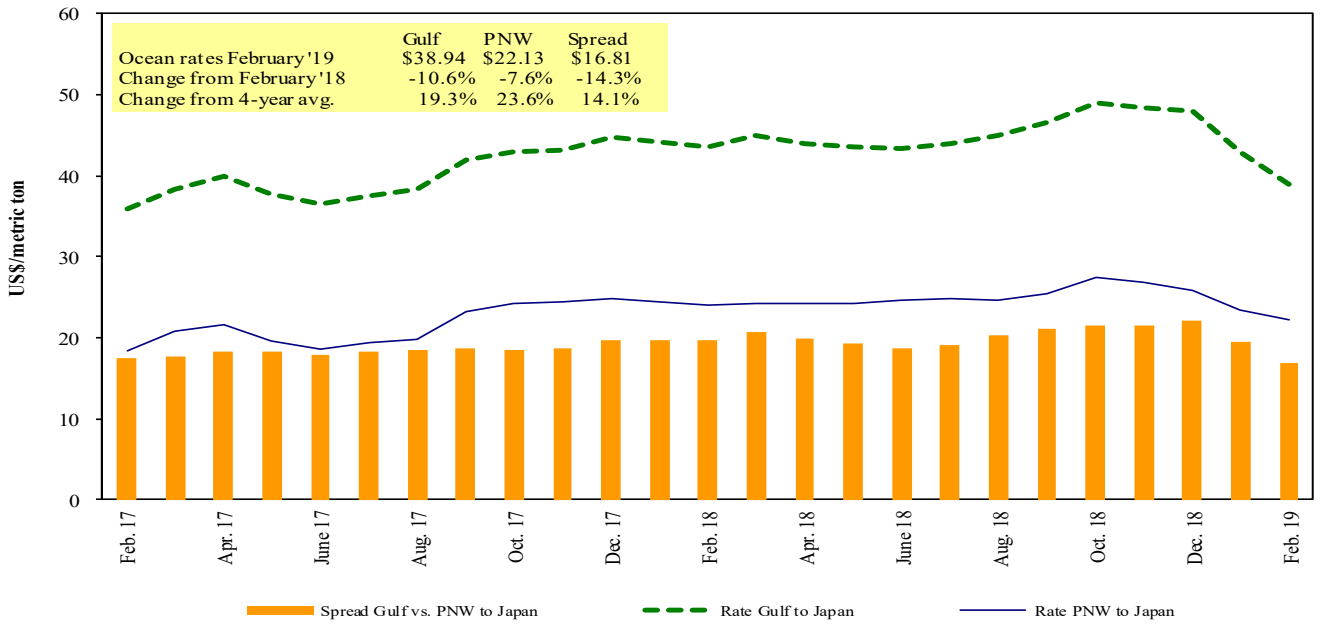
**U.S. Gulf Vessel Loading Activity**




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 03/16/2019**

| Export region | Import region | Grain types | Loading date | Volume loads (metric tons) | Freight rate (US$/metric ton) |
|---|---|---|---|---|---|
| U.S. Gulf | China | Heavy Grain | Mar 15/Apr 15 | 63,000 | 40.00 |
| PNW | China | Heavy Grain | Mar 2/18 | 60,000 | 27.50 |
| PNW | Oman | Wheat | Feb 18/28 | 25,000 | 69.94* |
| PNW | Taiwan | Heavy Grain | Sep 15/Oct 31 | 63,000 | 25.00 |
| Brazil | China | Heavy Grain | Mar 20/30 | 66,000 | 13.30 |
| Brazil | China | Heavy Grain | Mar 3/11 | 63,000 | 27.50 |
| Brazil | China | Heavy Grain | Feb 26/Mar 4 | 66,000 | 24.75 |
| Brazil | China | Heavy Grain | Feb 20/25 | 65,000 | 26.00 |
| Brazil | China | Heavy Grain | Feb 13/26 | 60,000 | 26.75 |
| Brazil | China | Heavy Grain | Jan 22/30 | 60,000 | 29.50 |
| 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 | S.Korea | Heavy Grain | Nov 5/10 | 66,000 | 43.00 |

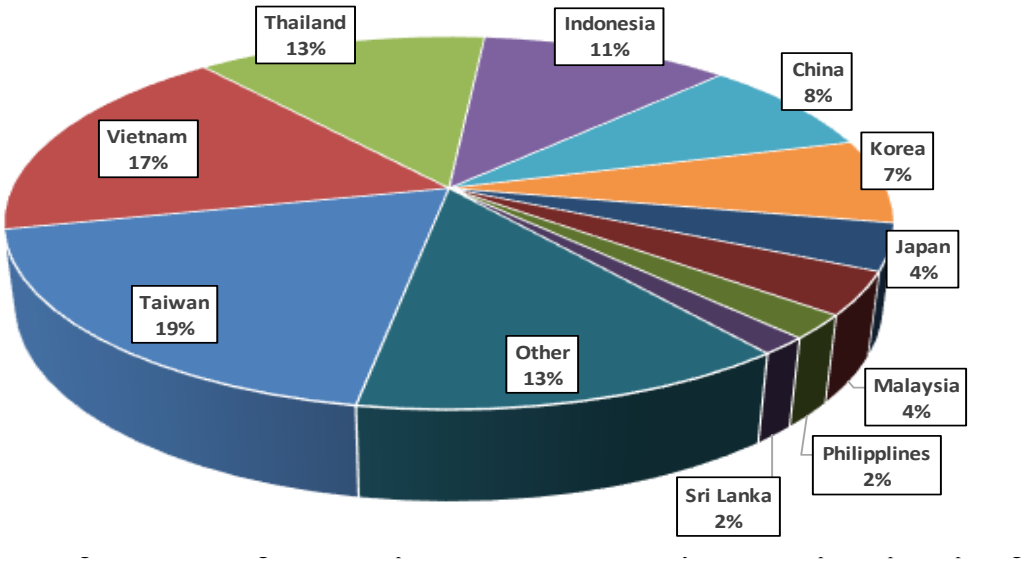
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option

*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.

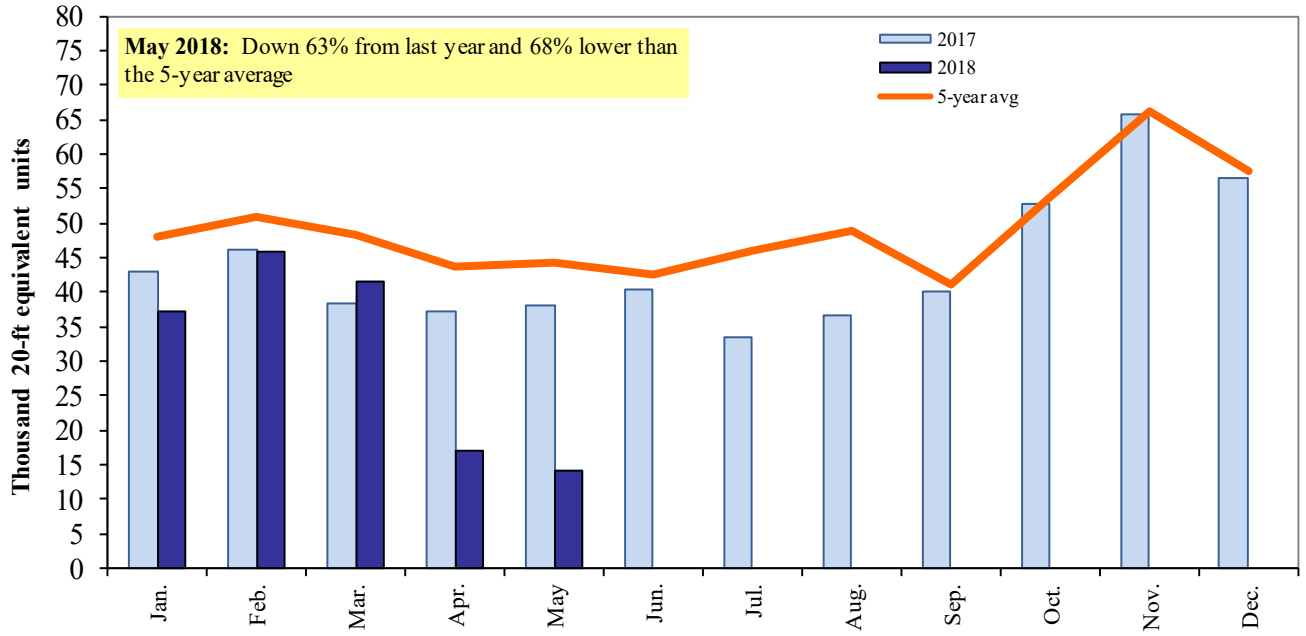
Figure 18
**Top 10 Destination Markets for U.S. Containerized Grain Exports, January-May 2018**




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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