



Grain Transportation Report

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

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May 30, 2019

WEEKLY HIGHLIGHTS

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Floods Continue to Disrupt Barge Traffic

On-going highwater conditions continue to disrupt barge traffic on most of the inland waterways. On the Upper Mississippi River there are multiple lock closures. As of May 30, all traffic through St. Louis is stopped, as the Mississippi River gauge there was 42.4 feet and rising. The Coast Guard stops all traffic at St. Louis when the river gauge exceeds 38 feet. The National Weather Service's forecast doesn't show the river levels dropping below 38 feet until mid-June. Barge traffic is also stopped on the Lower Illinois River and much of the Arkansas River. The Ohio River and the Lower Mississippi River are open but traffic is delayed by high water conditions. The U.S. Army Corps of Engineers reports saturated soil levels throughout the Mississippi River Valley Basin are at 25-year highs. Additional rain, coupled with the saturated soils, may bring faster runoff and rapid jumps in river stages.

Grain Inspections Down Slightly but Corn Rebounds

For the week ending May 23, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.16 million metric tons (mmt). This amount signifies a 3 percent decrease from the previous week, a 22 percent drop from last year, and a 2 percent decrease from the 3-year average. Although inspections of corn and soybeans increased 31 and 7 percent, respectively, from week to week, the increases could not offset the 41 percent drop in inspections of wheat. Compared to the previous week, grain inspections decreased 3 percent in the Mississippi Gulf and 5 percent in the Pacific Northwest (PNW).

Ocean Freight Rates Ticked Up Slightly for Two Consecutive Weeks

Ocean freight rates for shipping bulk grains rose for two consecutive weeks, but they are still below the levels seen at the beginning of the year, and relatively the same as the same period last year. As of May 23, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$43.50. This is a 2 percent increase since the last 2 weeks, but 7 percent less than the beginning of the year, and unchanged from the same period last year. The rate from the Pacific Northwest to Japan was \$24.00 per mt. This is a 4 percent increase since the last 2 weeks, but 4 percent less than the beginning of the year, and 1 percent less than the same period last year. According to the May 23 Transportation and Export report by O'Neil Commodity Consulting, rates are expected to continue rise gradually as we move into the fourth quarter. However, the direction of the rates could be impacted by the outcome of the current tariff and trade turmoil.

Snapshots by Sector

Export Sales

For the week ending May 16, **unshipped balances** of wheat, corn, and soybeans totaled 24 mmt. This indicates a 19 percent decrease in outstanding sales, compared to the same time last year. Net weekly **wheat export sales** were .048 mmt, down 58 percent from the previous week. Net **corn export sales** totaled .442 mmt, down 20 percent from the previous week. Net **soybean export sales** totaled .536 mmt, up 45 percent from the past week.

Rail

U.S. Class I railroads originated 23,194 **grain carloads** for the week ending May 18. This is 4 percent lower than the previous week, up 4 percent from last year, and 6 percent above the 3-year average.

Average June shuttle **secondary railcar** bids/offers (per car) were \$22 below tariff for the week ending May 23. This is \$136 above last week and \$322 lower than last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending May 25, **barge grain movements** totaled 542,150 tons. This is 47 percent more than the previous week and 27 percent lower than the same period last year.

For the week ending May 25, 324 grain barges **moved down river**. This is 114 more barges than the previous week. There were 432 grain barges **unloaded in New Orleans**. This is 16 percent lower than the previous week.

Ocean

For the week ending May 23, 36 **ocean-going grain vessels** were loaded in the Gulf. This is 16 percent more than the same period last year. Forty-two vessels are expected to be loaded within the next 10 days. This is 11 percent more than the same period last year.

As of May 23, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$43.50. This is 1 percent more than the previous week. The rate from the Pacific Northwest to Japan was \$24.00 per mt, a 2 percent increase from the previous week.

Fuel

For the week ending May 27, the **U.S. average diesel fuel price** decreased 1.2 cents, from the previous week, to \$3.151 per gallon. This price is 13.7 cents below the same week last year.

Feature Article/Calendar

U.S. Grain Transportation Costs to Mexico Declined

During the first quarter of 2019, total transportation costs of shipping grain (corn, soybeans, and wheat) from the United States to Mexico via land and sea routes fell from the previous quarter (see table below). The transportation costs of shipping corn, soybeans, and wheat via the water route declined 4 percent, compared to the previous quarter. The costs of shipping corn, soybeans and wheat by land declined 1 percent, respectively, from the previous quarter. The decrease in transportation costs of grain shipped through the water route was caused by a fall in truck and ocean freight rates during the quarter. Similarly, truck rates fell for shipments through the land route, while the tariff rail rates remained relatively unchanged.

Quarterly costs of transporting U.S. grain to Veracruz and Guadalajara, Mexico										
	Water route (to Veracruz)					Land route (to Guadalajara)				
	\$/metric ton					\$/metric ton				
	2018 1 st qtr.	2018 4 th qtr.	2019 1 st qtr.	Percent change Yr. to Yr.	Qtr. to Qtr.	2018 1 st qtr.	2018 4 th qtr.	2019 1 st qtr.	Percent change Yr. to Yr.	Qtr. to Qtr.
Corn										
Origin	IL					IA				
Truck	13.87	12.10	8.78	-36.7	-27.4	4.94	5.20	4.37	-11.5	-16.0
Rail ¹						87.60	91.13	91.00	3.9	-0.1
Barge	20.97	21.38	24.50	16.8	14.6					
Ocean ²	13.97	15.63	13.89	-0.6	-11.1					
Total transportation cost ³	48.81	49.11	47.17	-3.4	-4.0	92.54	96.33	95.37	3.1	-1.0
Farm Value ⁴	136.21	137.99	141.20	3.7	2.3	131.23	135.43	139.49	6.3	3.0
Landed Cost ⁵	185.02	187.10	188.37	1.8	0.7	223.77	231.76	234.86	5.0	1.3
Transport % of landed cost	26	26	25			41	42	41		
Soybeans										
Origin	IL					NE				
Truck	13.87	12.10	8.78	-36.7	-27.4	4.94	5.20	4.37	-11.5	-16.0
Rail						91.51	94.37	94.21	3.0	-0.2
Barge	20.97	21.38	24.50	16.8	14.6					
Ocean	13.97	15.63	13.89	-0.6	-11.1					
Total transportation cost	48.81	49.11	47.17	-3.4	-4.0	96.45	99.57	98.58	2.2	-1.0
Farm Value	359.48	323.34	321.87	-10.5	-0.5	341.72	300.20	302.89	-11.4	0.9
Landed Cost	408.29	372.45	369.04	-9.6	-0.9	438.17	399.77	401.47	-8.4	0.4
Transport % of landed cost	12	13	13			22	25	25		
Wheat										
Origin	KS					KS				
Truck	4.94	5.20	4.37	-11.5	-16.0	4.94	5.20	4.37	-11.5	-16.0
Rail	41.42	42.66	42.66	3.0	0.0	77.75	79.66	79.65	2.4	0.0
Ocean	13.97	15.63	13.89	-0.6	-11.1					
Total transportation cost	60.33	63.49	60.92	1.0	-4.0	82.69	84.86	84.02	1.6	-1.0
Farm Value	155.92	175.14	181.39	16.3	3.6	155.92	175.14	181.39	16.3	3.6
Landed Cost	216.25	238.63	242.31	12.1	1.5	238.61	260.00	265.41	11.2	2.1
Transport % of landed cost	28	27	25			35	33	32		

¹Rail rates include U.S. and Mexico portions of the movement. Mexico rail rates are estimated based on actual quoted market rates.

BNSF and Union Pacific quoted rail tariff rates are through rates for shuttle trains. Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary market, which could exceed the rail tariff rate plus fuel surcharge shown in the table.

²Source: O'Neil Commodity Consulting

³Transportation costs for Kansas wheat transported via water route were revised from previous estimates

⁴Source: USDA/NASS

⁵Landed cost is total transportation cost plus farm value

The reduction in truck rates was partly caused by lower diesel prices during the quarter, especially from January to mid-February when the prices fell (see *Grain Transportation Report (GTR Figure 13)*). Ocean freight rates for shipping bulk commodities, including grains fell during the quarter, compared to the previous quarter and a year earlier (see April 25, 2019 *GTR*). Lower ocean freight rates were attributed to a slowdown in trade activity due to New Year holidays around the world, including the Chinese New Year celebration. Coal trade also slowed because of high coal inventories at Chinese ports.

Also, there was a low supply of iron ore from Australia and Brazil due to bad weather in Australia and a collapsed dam in Brazil (see April 25, 2019 [GTR](#)).

Year-to-year transportation costs decreased for seaborne corn and soybeans, however, increased for wheat. Transportation costs for all grains shipped through the land route also increased from year to year. Corn and wheat farm values increased from quarter to quarter and year to year, pushing up the landed costs. Farm values for Illinois soybeans decreased from quarter to quarter and year to year. Farm values for Nebraska soybeans increased from quarter to quarter but decreased from year to year. However, the transportation share of the landed costs for corn and wheat declined, compared to the previous quarter, while soybean transportation share remained the same (see table). The landed cost ranged from \$188 to \$369 per metric ton (mt) for the water route (see table and figure 1) and \$235 to \$401 per mt for the land route (see table and figure 2). The transportation share of the landed cost ranged from 13 to 25 percent for the water route and 25 to 41 percent for the land route (see table).

According to [USDA's grain inspection data](#), less corn and soybeans, but more wheat, were inspected for export to Mexico during the first quarter of 2019, compared to the previous quarter. However, more corn, soybeans, and wheat were inspected for exports to Mexico compared to the same period a year ago. During the first quarter of 2019, 3.06 million metric tons (mmt) of corn, 1.12 mmt of soybeans, and .70

mmt of wheat were inspected for export to Mexico. This compares to 2.78 mmt, .91 mmt and .63 mmt, respectively, during the first quarter of 2018. In 2019, corn, soybeans and wheat inspected for export to Mexico were respectively 10, 24, and 11 percent more than 2018. United States proximity to Mexico and lower transportation costs could continue to boost the competitiveness of U.S. grain exports to Mexico. surajudeen.olowolayemo@usda.gov

Figure 1. Water route shipment costs (\$/mt) to Veracruz, Mexico

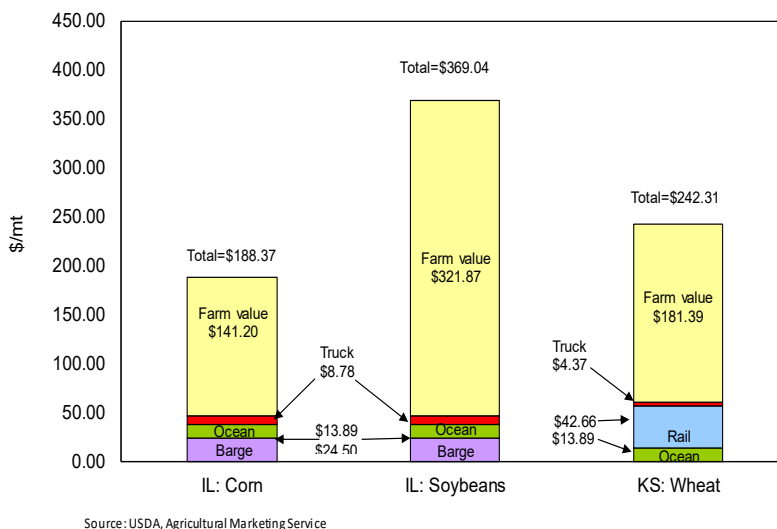
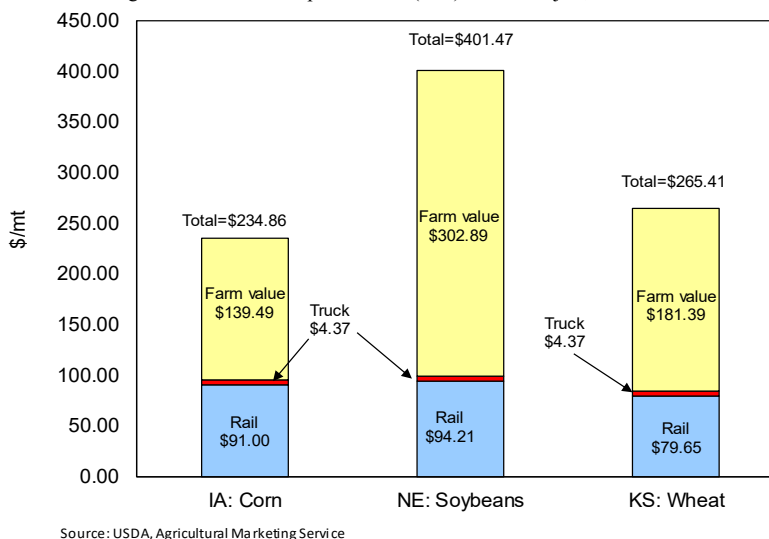


Figure 2. Land route shipment costs (\$/mt) to Guadalajara, Mexico



Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
05/29/19	211	279	219	n/a	195	170
05/22/19	212	291	213	229	192	167

¹Indicator: 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)
n/a = not available due to flooding of the river

Source: Transportation & Marketing Program/AMS/USDA

Table 2

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

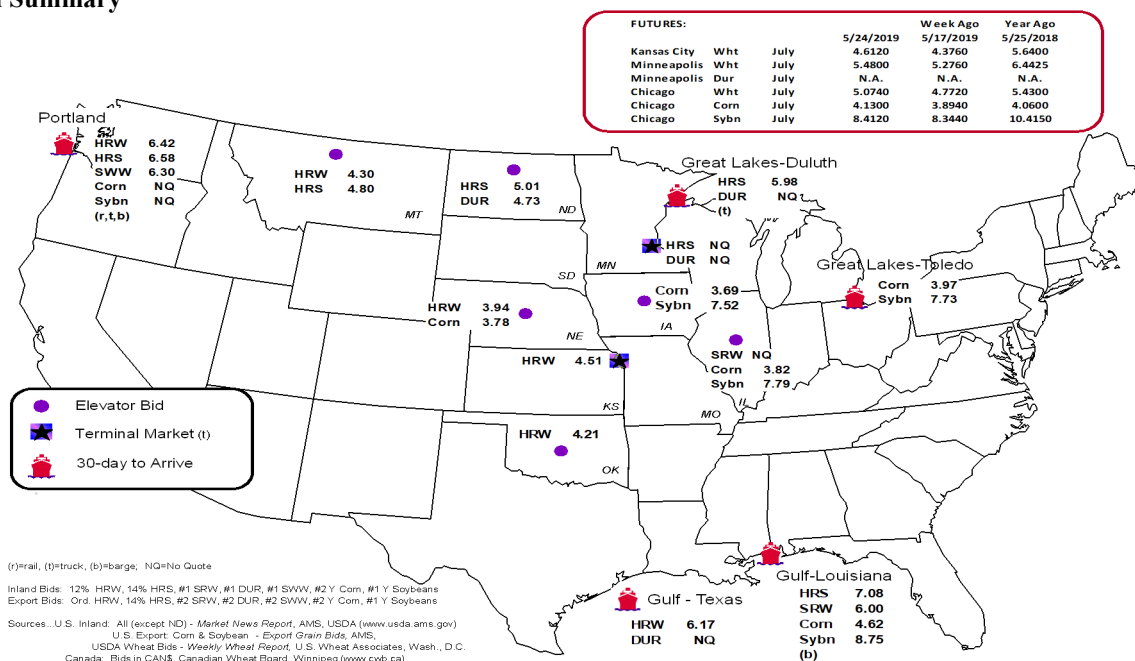
Commodity	Origin--Destination	5/24/2019	5/17/2019
Corn	IL--Gulf	-0.80	-0.74
Corn	NE--Gulf	-0.84	-0.76
Soybean	IA--Gulf	-1.23	-1.17
HRW	KS--Gulf	-1.66	-1.61
HRS	ND--Portland	-1.57	-1.55

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		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
5/22/2019 ^p	1,358	1,509	4,555	402	7,824	5/18/2019	3,188
5/15/2019 ^r	949	1,074	4,913	392	7,328	5/11/2019	2,869
2019 YTD ^f	17,890	24,718	115,098	7,724	165,430	2019 YTD	47,729
2018 YTD ^f	8,980	28,710	137,373	9,418	184,481	2018 YTD	42,989
2019 YTD as % of 2018 YTD	199	86	84	82	90	% change YTD	111
Last 4 weeks as % of 2018 ²	215	225	67	63	85	Last 4wks % 2018	97
Last 4 weeks as % of 4-year avg. ²	406	97	101	118	112	Last 4wks % 4 yr	120
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.

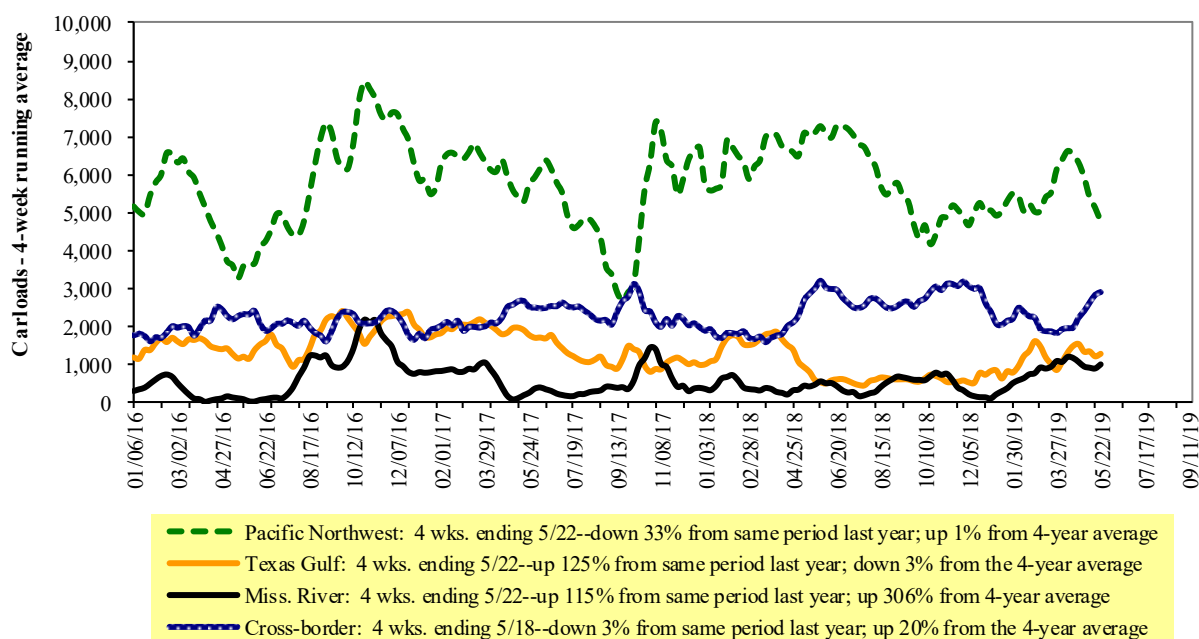
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)

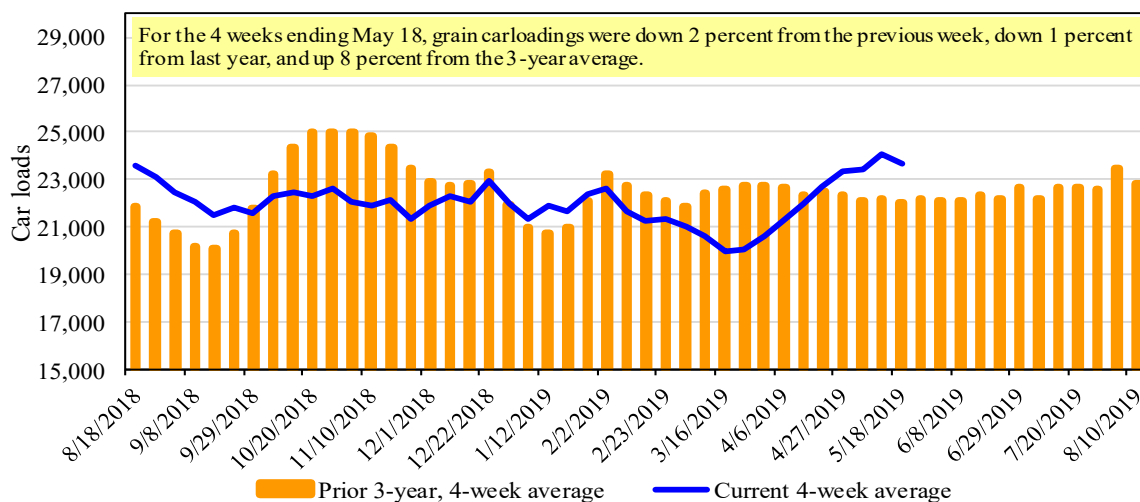
For the week ending: 5/18/2019	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,101	2,918	11,317	1,091	5,767	23,194	5,021	3,848
This week last year	1,615	2,226	11,540	887	5,966	22,234	4,091	4,467
2019 YTD	39,427	55,924	219,211	22,390	103,486	440,438	88,558	86,238
2018 YTD	38,601	49,326	246,698	18,778	106,319	459,722	74,757	90,260
2019 YTD as % of 2018 YTD	102	113	89	119	97	96	118	96
Last 4 weeks as % of 2018*	96	121	95	108	98	99	116	94
Last 4 weeks as % of 3-yr avg.**	110	119	108	111	99	108	133	105
Total 2018	98,978	133,171	635,458	48,638	267,713	1,183,958	211,817	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 Offerings¹ (\$/car)²

For the week ending: 5/23/2019		Delivery period							
5/23/2019		Jun-19	Jun-18	Jul-19	Jul-18	Aug-19	Aug-18	Sep-19	Sep-18
BNSF ³	COT grain units	no bids	no offer	0	0	0	0	n/a	0
	COT grain single-car ⁵	3	no offer	9	117	20	0	n/a	117
UP ⁴	GCAS/Region 1	no offer	no offer	10	no offer	no offer	no bids	n/a	n/a
	GCAS/Region 2	no offer	no offer	no bid	no offer	no offer	10	n/a	n/a

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

² Average premium/discount to tariff, last auction

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

⁴ UP - GCAS = Grain Car Allocation System

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

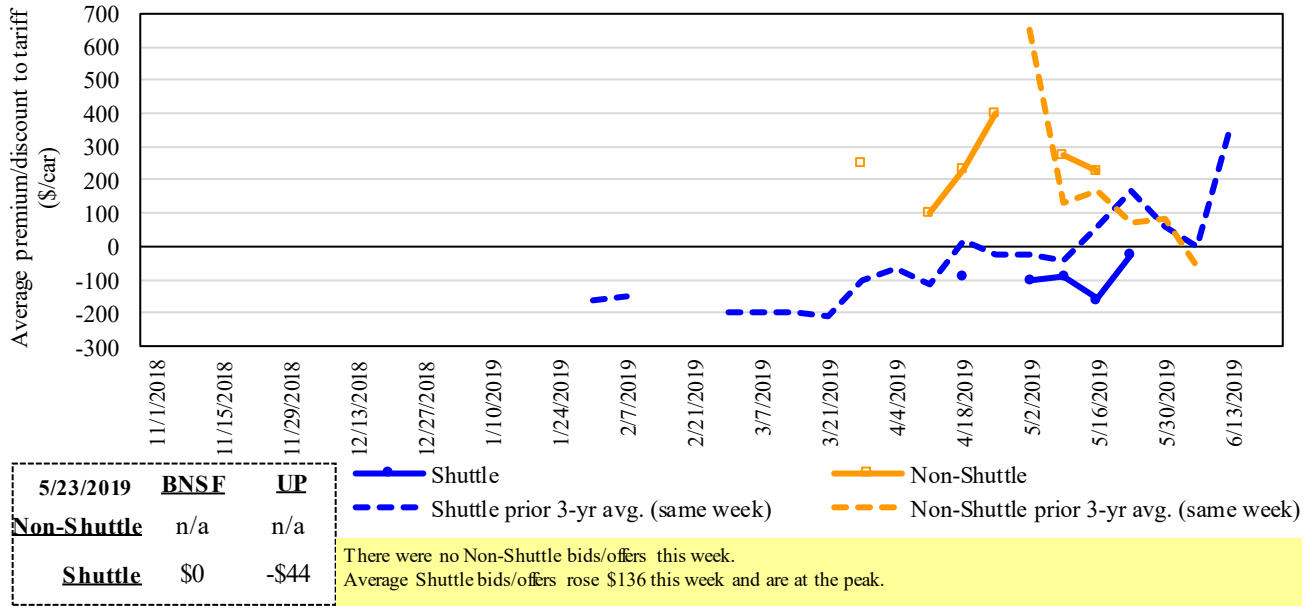
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Program/AMS/USDA.

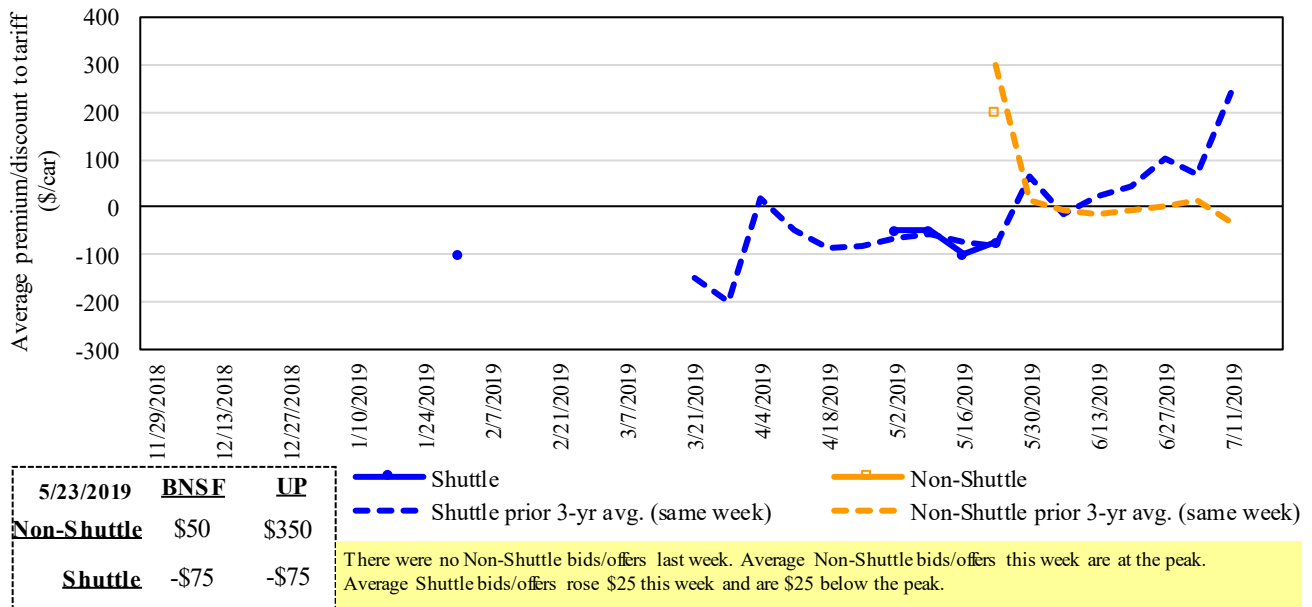
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4
Bids/Offers for Railcars to be Delivered in June 2019, Secondary Market



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

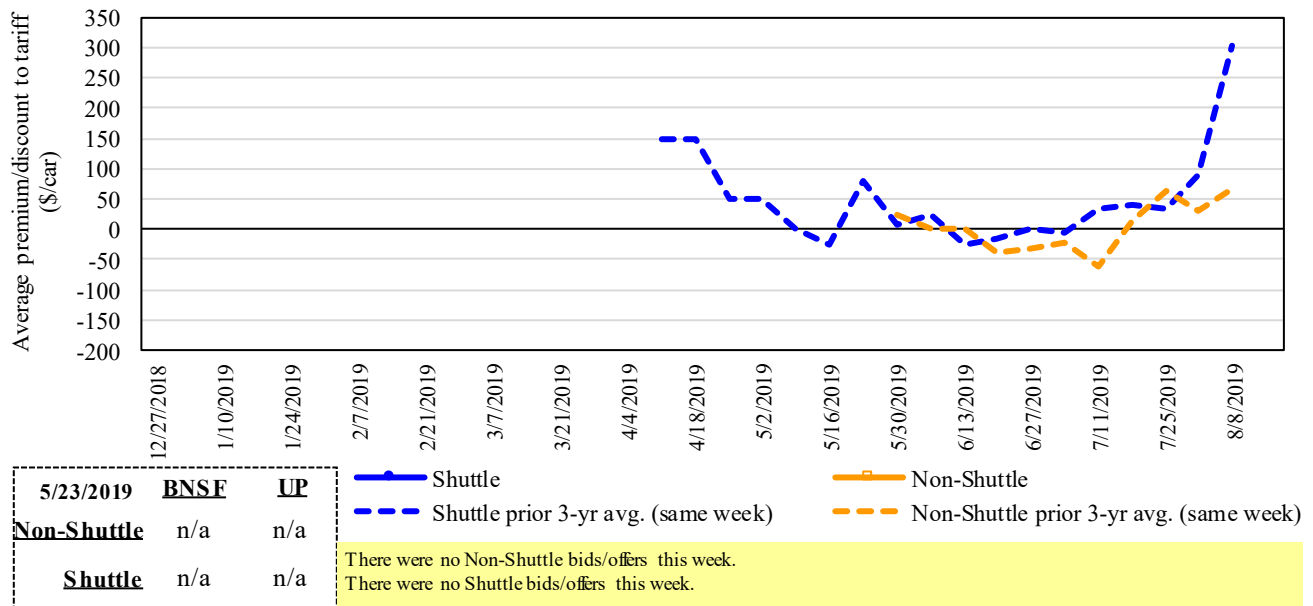
Figure 5
Bids/Offers for Railcars to be Delivered in July 2019, Secondary Market



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 August 2019, Secondary Market



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:		Delivery period					
		Jun-19	Jul-19	Aug-19	Sep-19	Oct-19	Nov-19
Non-shuttle	5/23/2019						
	BNSF-GF	n/a	50	n/a	n/a	n/a	n/a
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	n/a	(250)	n/a	n/a	n/a	n/a
	UP-Pool	n/a	350	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	0	(75)	n/a	n/a	n/a	n/a
	Change from last week	133	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	(650)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(44)	(75)	n/a	n/a	n/a	n/a
	Change from last week	139	25	n/a	n/a	n/a	n/a
Change from same week 2018	6	(75)	n/a	n/a	n/a	n/a	

¹Average 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 Shipments¹

May, 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	\$101	\$40.56	\$1.10	3
	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	\$178	\$46.85	\$1.28	0
	Sioux Falls, SD	Galveston-Houston, TX	\$6,911	\$0	\$68.63	\$1.87	2
	Northwest KS	Galveston-Houston, TX	\$4,816	\$195	\$49.76	\$1.35	0
	Amarillo, TX	Los Angeles, CA	\$5,121	\$271	\$53.55	\$1.46	2
Corn	Champaign-Urbana, IL	New Orleans, LA	\$4,000	\$201	\$41.72	\$1.06	2
	Toledo, OH	Raleigh, NC	\$6,581	\$0	\$65.35	\$1.66	4
	Des Moines, IA	Davenport, IA	\$2,258	\$43	\$22.85	\$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	\$125	\$37.08	\$0.94	0
	Des Moines, IA	Los Angeles, CA	\$5,327	\$365	\$56.52	\$1.44	1
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,631	\$194	\$37.98	\$1.03	-11
	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	\$201	\$49.12	\$1.34	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	\$320	\$61.88	\$1.68	2
	Corn	Minneapolis, MN	Portland, OR	\$5,180	\$0	\$51.44	\$1.31
Sioux Falls, SD		Tacoma, WA	\$5,140	\$0	\$51.04	\$1.30	4
Champaign-Urbana, IL		New Orleans, LA	\$3,800	\$201	\$39.73	\$1.01	2
Lincoln, NE		Galveston-Houston, TX	\$3,880	\$0	\$38.53	\$0.98	5
Des Moines, IA		Amarillo, TX	\$4,060	\$157	\$41.88	\$1.06	3
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	\$232	\$49.72	\$1.35	0
	Toledo, OH	Huntsville, AL	\$4,634	\$0	\$46.02	\$1.25	6
	Grand Island, NE	Portland, OR	\$5,710	\$327	\$59.95	\$1.63	1

¹A 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.

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

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

⁴Percentage 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: May, 2019			Fuel			Percent	
Commodity	Origin state	Destination region	Tariff rate/car ¹	surcharge per car ²	Tariff plus surcharge per:		change ⁴ Y/Y
					metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,284	\$0	\$74.43	\$2.02	-2
	OK	Cuautitlan, EM	\$6,743	\$139	\$70.32	\$1.91	2
	KS	Guadalajara, JA	\$7,371	\$424	\$79.65	\$2.17	2
	TX	Salinas Victoria, NL	\$4,329	\$85	\$45.10	\$1.23	1
Corn	IA	Guadalajara, JA	\$8,528	\$373	\$90.95	\$2.31	4
	SD	Celaya, GJ	\$7,880	\$0	\$80.51	\$2.04	2
	NE	Queretaro, QA	\$8,207	\$291	\$86.83	\$2.20	3
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	2
	MO	Tlalnepantla, EM	\$7,573	\$284	\$80.28	\$2.04	3
	SD	Torreón, CU	\$7,480	\$0	\$76.43	\$1.94	2
Soybeans	MO	Bojay (Tula), HG	\$8,284	\$346	\$88.18	\$2.40	3
	NE	Guadalajara, JA	\$8,842	\$374	\$94.16	\$2.56	3
	IA	El Castillo, JA	\$9,110	\$0	\$93.08	\$2.53	2
	KS	Torreón, CU	\$7,714	\$271	\$81.58	\$2.22	4
Sorghum	NE	Celaya, GJ	\$7,527	\$340	\$80.38	\$2.04	3
	KS	Queretaro, QA	\$8,000	\$174	\$83.52	\$2.12	2
	NE	Salinas Victoria, NL	\$6,633	\$140	\$69.20	\$1.76	3
	NE	Torreón, CU	\$6,962	\$255	\$73.74	\$1.87	3

¹Rates 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.

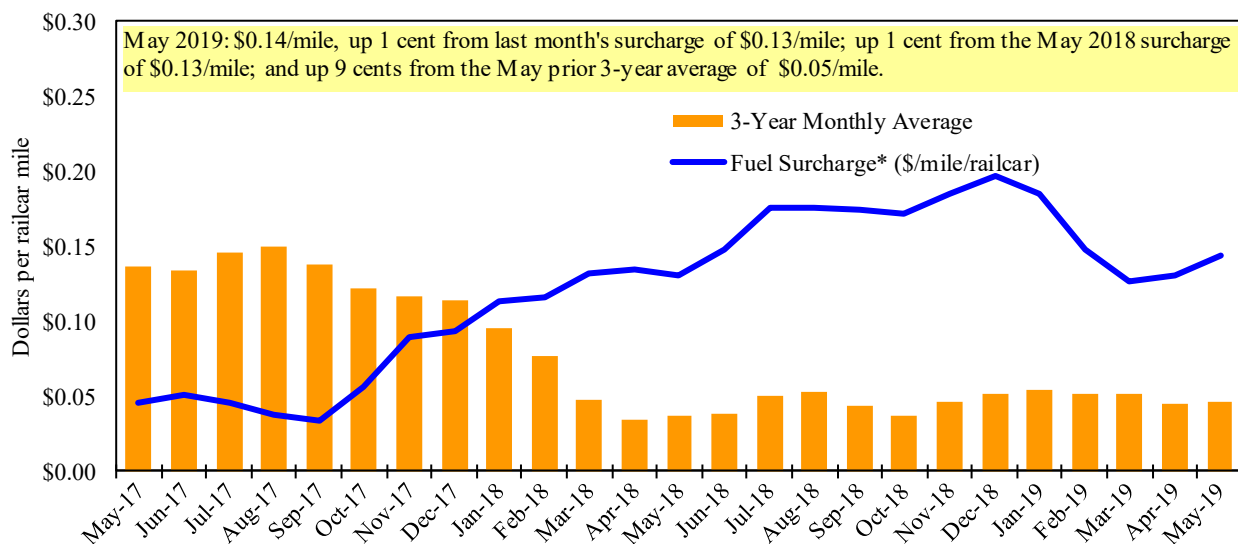
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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

⁴Percentage change calculated using tariff rate plus fuel surcharge

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹

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.

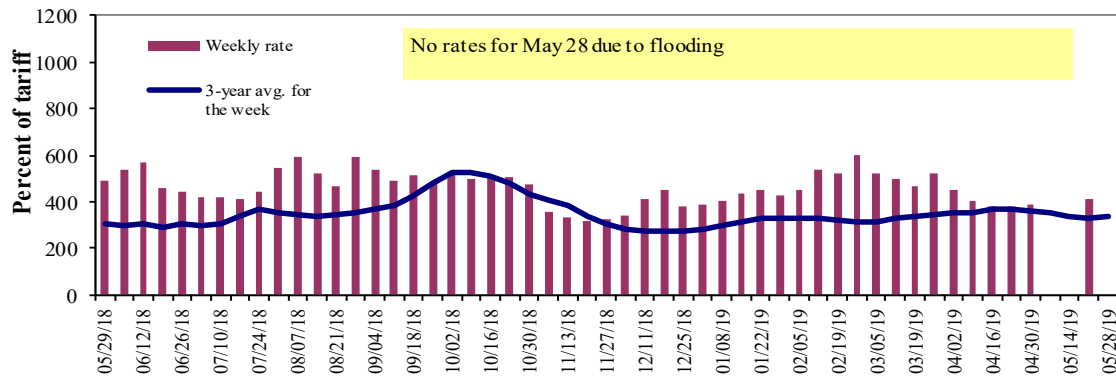
** CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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	5/28/2019	-	-	-	-	330	330	273
	5/21/2019	-	-	413	283	328	328	287
\$/ton	5/28/2019	-	-	-	-	15.48	13.33	8.57
	5/21/2019	-	-	19.16	11.29	15.38	13.25	9.01
Current week % change from the same week:								
	Last year	-	-	-	-	-4	-4	-7
	3-year avg. ²	-	-	-	-	38	38	28
Rate ¹	June	438	408	408	283	308	308	268
	August	483	438	438	375	438	438	413

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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.

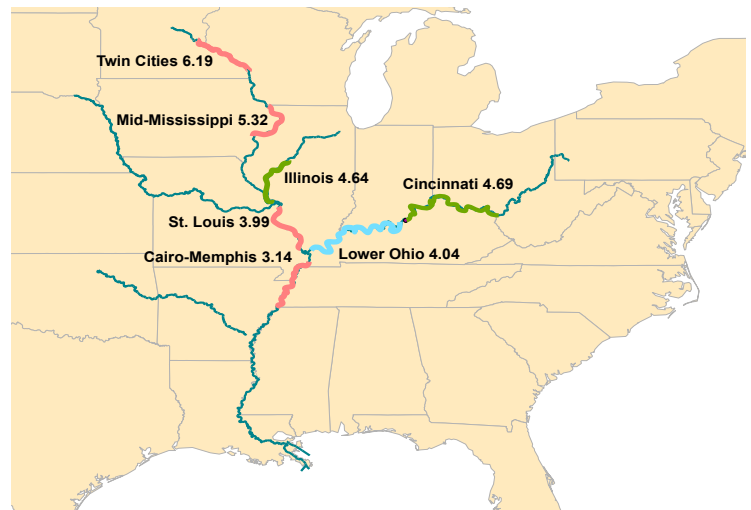
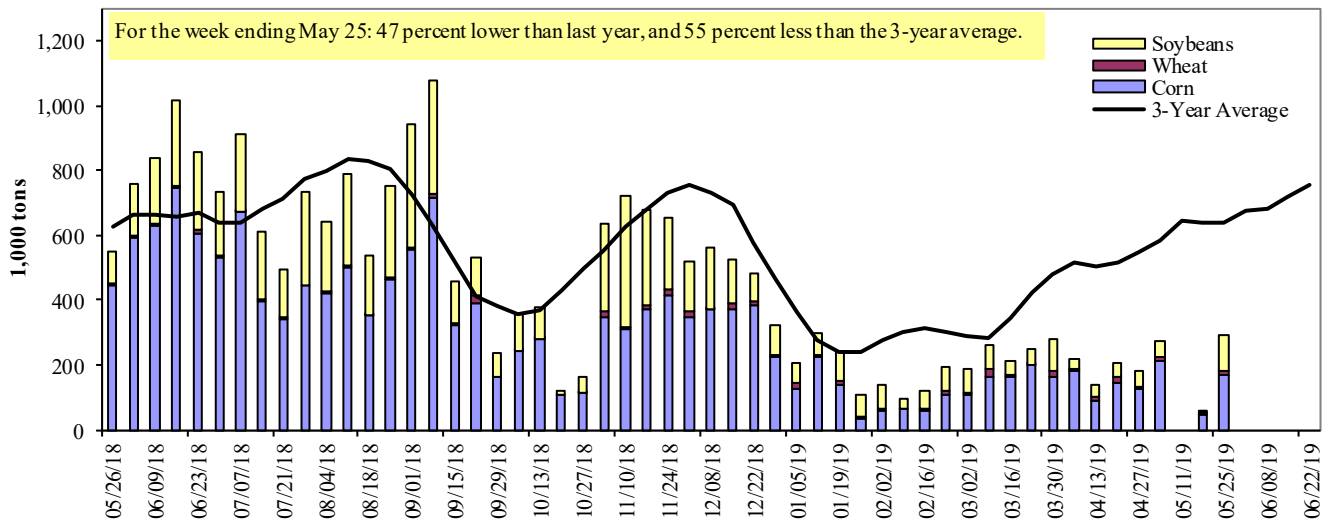


Figure 10

Barge Movements on the Mississippi River¹ (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 05/25/2019	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	2	0	2
Winfield, MO (L25)	34	10	6	0	50
Alton, IL (L26)	176	10	101	0	286
Granite City, IL (L27)	172	10	109	0	290
Illinois River (L8)					
	90	0	33	0	123
Ohio River (OLMSTED)					
	146	0	99	4	248
Arkansas River (L1)					
	0	0	4	0	4
Weekly total - 2019	317	10	212	4	542
Weekly total - 2018	537	30	169	2	738
2019 YTD ¹	5,090	846	3,737	69	9,742
2018 YTD ¹	8,268	621	4,267	58	13,214
2019 as % of 2018 YTD	62	136	88	119	74
Last 4 weeks as % of 2018 ²	45	70	74	484	53
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.

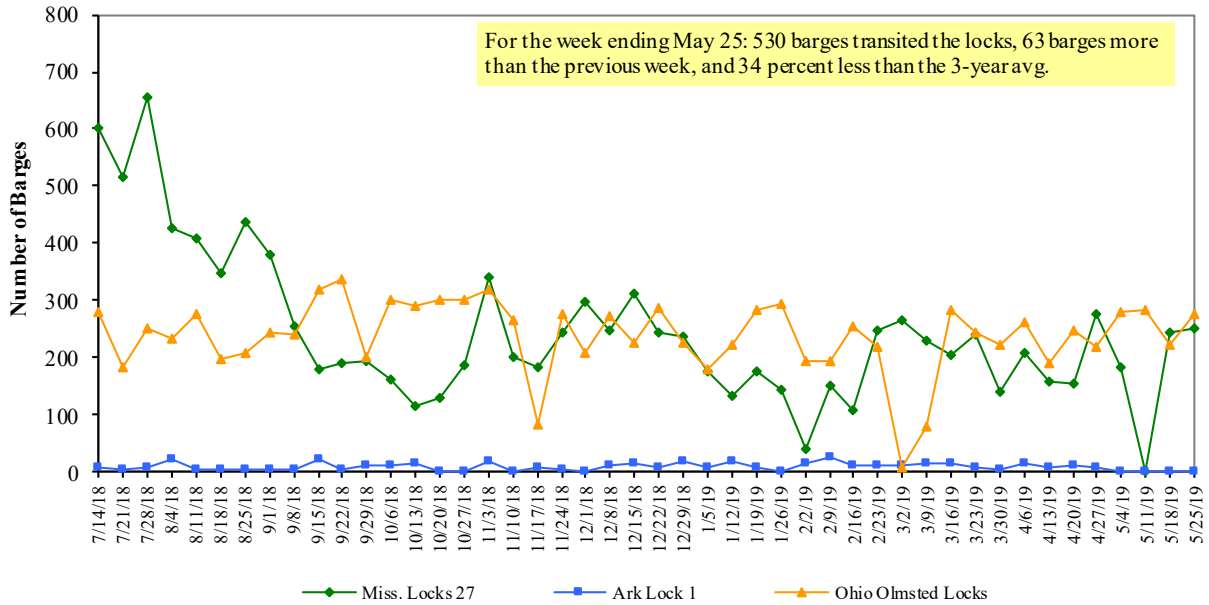
² As a percent of same period in 2018.

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.

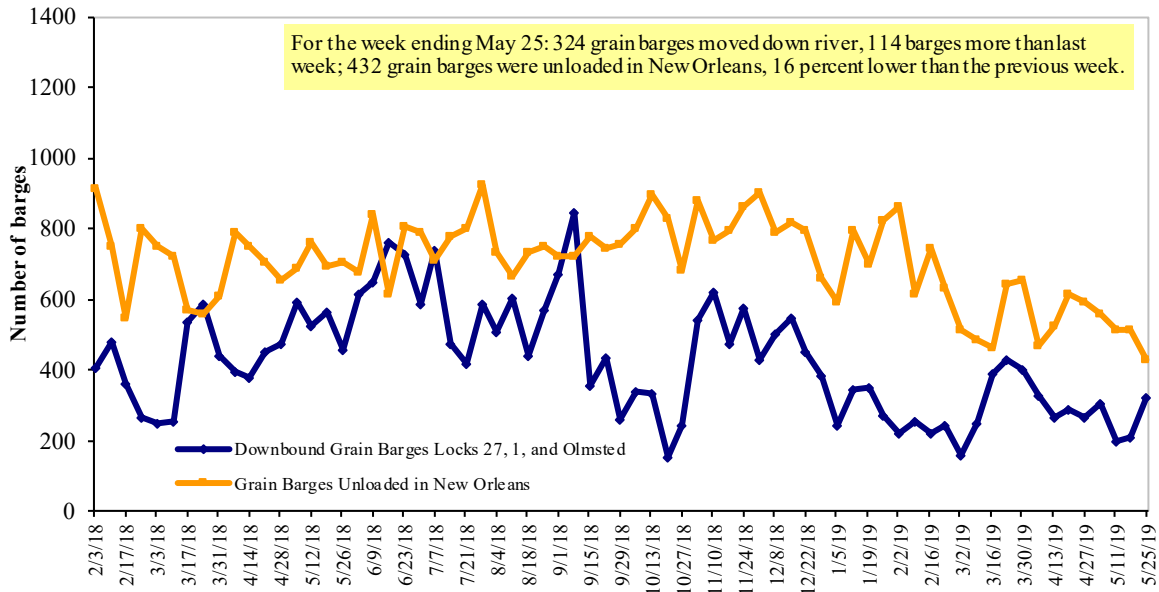
Source: U.S. Army Corps of Engineers

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 AMS FGIS

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.

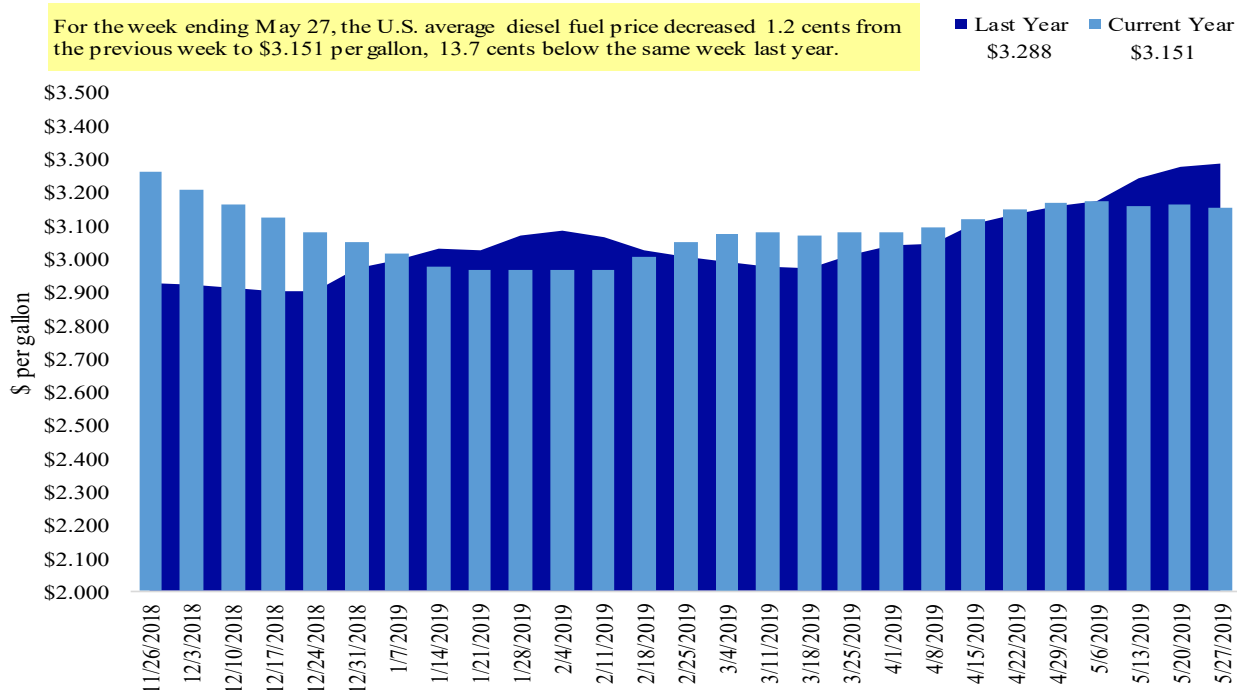
Table 11
Retail on-Highway Diesel Prices, Week Ending 5/27/2019 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.164	-0.012	-0.123
	New England	3.225	-0.013	-0.082
	Central Atlantic	3.360	-0.015	-0.083
	Lower Atlantic	3.020	-0.010	-0.154
II	Midwest	3.038	-0.011	-0.192
III	Gulf Coast	2.893	-0.014	-0.161
IV	Rocky Mountain	3.181	-0.011	-0.172
V	West Coast	3.782	-0.012	-0.002
	West Coast less California	3.338	-0.014	-0.176
	California	4.134	-0.011	0.137
Total	U.S.	3.151	-0.012	-0.137

¹Diesel 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)

For the week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances¹									
5/16/2019	1,307	263	596	491	28	2,684	9,460	11,838	23,982
This week year ago	396	289	731	532	22	1,969	17,809	9,752	29,529
Cumulative exports-marketing year²									
2018/19 YTD	8,012	3,099	6,512	4,933	476	23,031	37,880	33,935	94,846
2017/18 YTD	8,896	2,249	5,432	4,784	384	21,745	35,660	45,440	102,845
YTD 2018/19 as % of 2017/18	90	138	120	103	124	106	106	75	92
Last 4 wks as % of same period 2017/18	448	182	109	126	236	194	57	125	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 Importers¹ of U.S. Corn

For the week ending 5/16/2019	Total Commitments ²			% change current MY from last MY	Exports ³ 3-year avg 2015-2017
	2019/20	2018/19	2017/18		
	Next MY	Current MY	Last MY		
- 1,000 mt -					
Mexico	1,627	14,844	13,370	11	13,691
Japan	540	10,711	10,163	5	11,247
Korea	0	3,758	4,539	(17)	4,754
Colombia	5	4,318	4,051	7	4,678
Peru	0	1,992	2,725	(27)	2,975
Top 5 Importers	2,172	35,623	34,848	2	37,344
Total US corn export sales	2,514	47,340	53,469	(11)	53,184
% of Projected	4%	81%	86%		
Change from prior week ²	184	442	854		
Top 5 importers' share of U.S. corn export sales	86%	75%	65%		70%
USDA forecast, May 2019	57,888	58,524	62,036	(6)	
Corn Use for Ethanol USDA forecast, May 2019	139,700	138,430	142,367	(3)	

(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/esquery/. 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 Importers¹ of U.S. Soybeans

For the week ending 5/16/2019	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg. 2015-2017	
	2019/20	2018/19	2017/18			
	Next MY	Current MY	Last MY			
		- 1,000 mt -				- 1,000 mt -
China	63	13,347	28,682	(53)	31,228	
Mexico	484	4,700	4,183	12	3,716	
Indonesia	6	1,981	2,124	(7)	2,250	
Japan	108	2,219	1,930	15	2,145	
Netherlands	0	1,848	1,524	21	2,209	
Top 5 importers	660	24,095	38,442	(37)	41,549	
Total US soybean export sales	1,424	45,773	55,192	(17)	55,113	
% of Projected	3%	95%	95%			
Change from prior week ²	5	536	(139)			
Top 5 importers' share of U.S. soybean export sales	46%	53%	70%		75%	
USDA forecast, May 2019	53,134	48,365	58,011	83		

(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 revisions from previous week's outstanding sales and/or accumulated sales³ FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

For the week ending 5/16/2019	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg 2015-2017	
	2019/20	2018/19	2017/18			
	Next MY	Current MY	Last MY			
		- 1,000 mt -				- 1,000 mt -
Mexico	296	3,315	2,955	12	2,781	
Japan	228	2,754	2,928	(6)	2,649	
Philippines	491	3,217	2,604	24	2,441	
Korea	217	1,442	1,538	(6)	1,257	
Nigeria	375	1,629	1,201	36	1,254	
Indonesia	0	1,550	1,141	36	1,076	
Taiwan	74	1,164	1,138	2	1,066	
China	0	42	900	(95)	944	
Colombia	114	660	368	79	714	
Thailand	183	757	664	14	618	
Top 10 importers	1,977	16,529	15,438	7	14,800	
Total US wheat export sales	3,322	25,715	23,714	8	22,869	
% of Projected	14%	102%	97%			
Change from prior week ²	345	48	112			
Top 10 importers' share of U.S. wheat export sales	60%	64%	65%		65%	
USDA forecast, May 2019	24,523	25,204	24,550	3		

(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 sales³ 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 05/23/19	Previous Week*	Current Week as % of Previous	2019 YTD*	2018 YTD*	2019 YTD as % of 2018 YTD	Last 4-weeks as % of:		2018 Total*
							Last Year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	143	326	44	5,682	4,920	115	130	107	13,315
Corn	299	213	140	5,519	8,720	63	57	81	20,024
Soybeans	72	0	n/a	4,090	4,546	90	11	24	7,719
Total	514	539	95	15,291	18,186	84	67	85	41,058
Mississippi Gulf									
Wheat	74	250	29	2,355	1,761	134	227	199	3,896
Corn	636	363	175	11,082	14,026	79	56	69	33,735
Soybeans	288	411	70	10,017	9,882	101	115	188	28,124
Total	997	1,025	97	23,455	25,669	91	82	106	65,755
Texas Gulf									
Wheat	225	187	120	2,807	1,684	167	409	207	3,198
Corn	0	59	0	331	265	125	179	183	730
Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	69
Total	225	247	91	3,138	1,948	161	358	204	3,997
Interior									
Wheat	38	39	98	678	650	104	84	102	1,614
Corn	131	190	69	2,920	3,441	85	68	81	8,650
Soybeans	103	97	106	2,620	2,591	101	84	123	6,729
Total	273	326	84	6,218	6,682	93	75	96	16,993
Great Lakes									
Wheat	41	80	51	289	204	141	167	166	894
Corn	0	0	n/a	0	109	0	0	0	404
Soybeans	30	11	282	83	52	162	79	103	1,192
Total	71	91	78	372	365	102	91	107	2,491
Atlantic									
Wheat	0	0	n/a	32	64	51	n/a	0	69
Corn	14	0	n/a	70	67	104	70	210	138
Soybeans	67	4	n/a	579	955	61	92	181	2,047
Total	81	4	n/a	681	1,086	63	89	164	2,253
U.S. total from ports*									
Wheat	520	883	59	11,843	9,282	128	173	140	22,986
Corn	1,080	826	131	19,923	26,628	75	58	75	63,682
Soybeans	561	524	107	17,390	18,026	96	82	140	45,879
Total	2,161	2,233	97	49,156	53,936	91	82	102	132,547

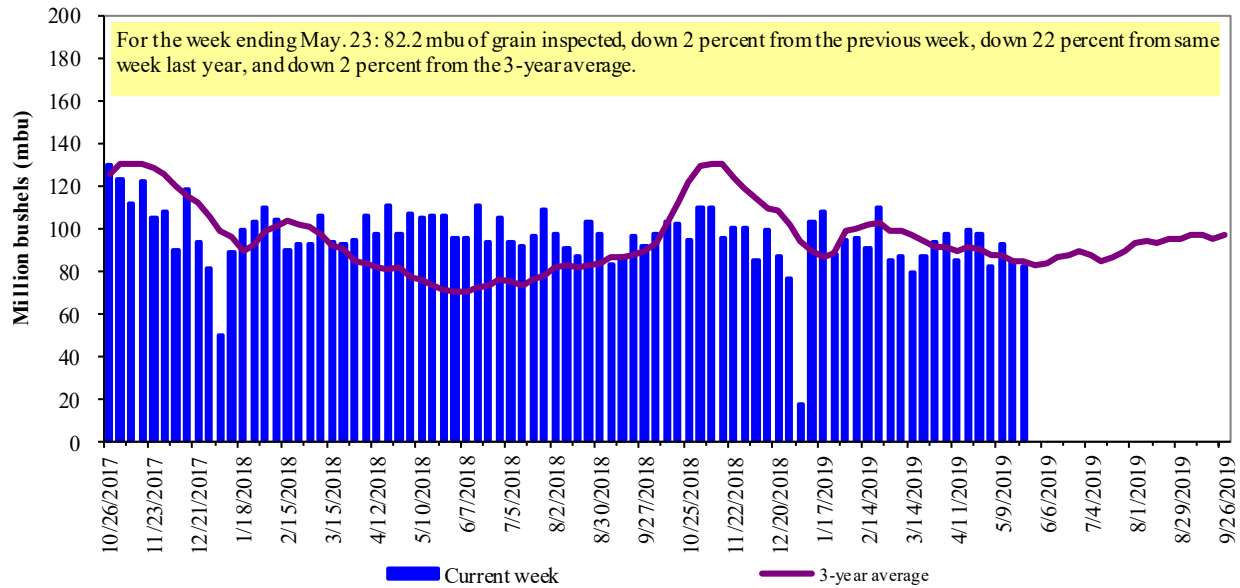
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: USDA/Federal Grain Inspection Service (www.gipsa.usda.gov/fgis); 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 53 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2018.

Figure 14

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

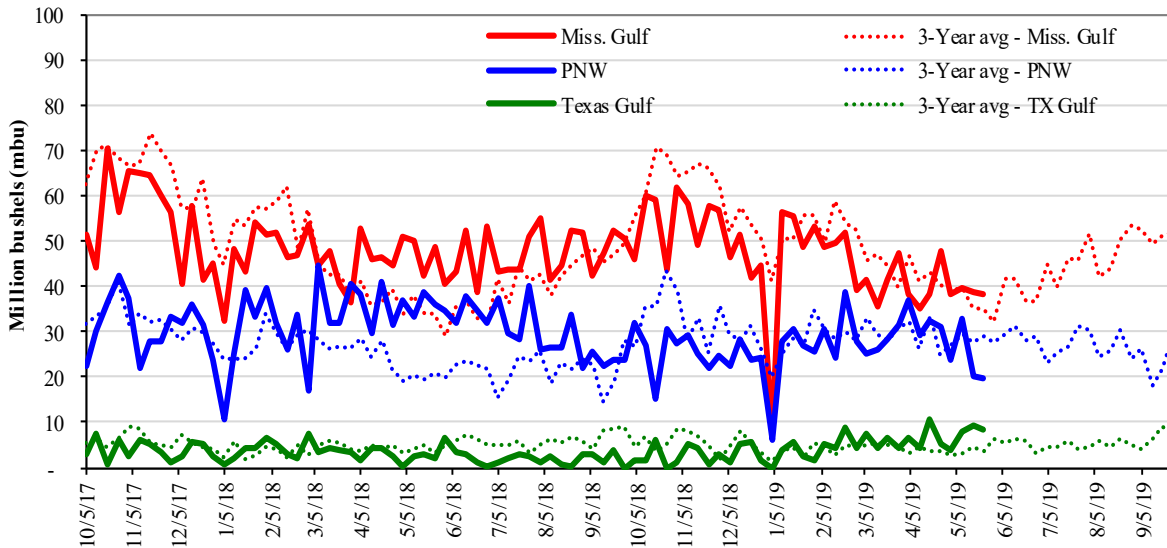


Source: USDA/Federal Grain Inspection Service (www.gipsa.usda.gov/fgis)

Note: 3-year average consists of 4-week running average

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW¹ (wheat, corn, and soybeans)



<u>Week ending 05/23/19 inspections (mbu):</u>		<u>Percent change from:</u>			
Mississippi Gulf:	38.3	Last Week:	unchanged	TX Gulf	down 10
PNW:	19.7	Last Year (same week):	down 21	U.S. Gulf	down 3
Texas Gulf:	8.3	3-yr avg. (4-wk. mov. Avg):	up 3	PNW	down 46
					down 31

Source: USDA/Federal Grain Inspection Service (www.gipsa.usda.gov/fgis)

Ocean Transportation

Table 17

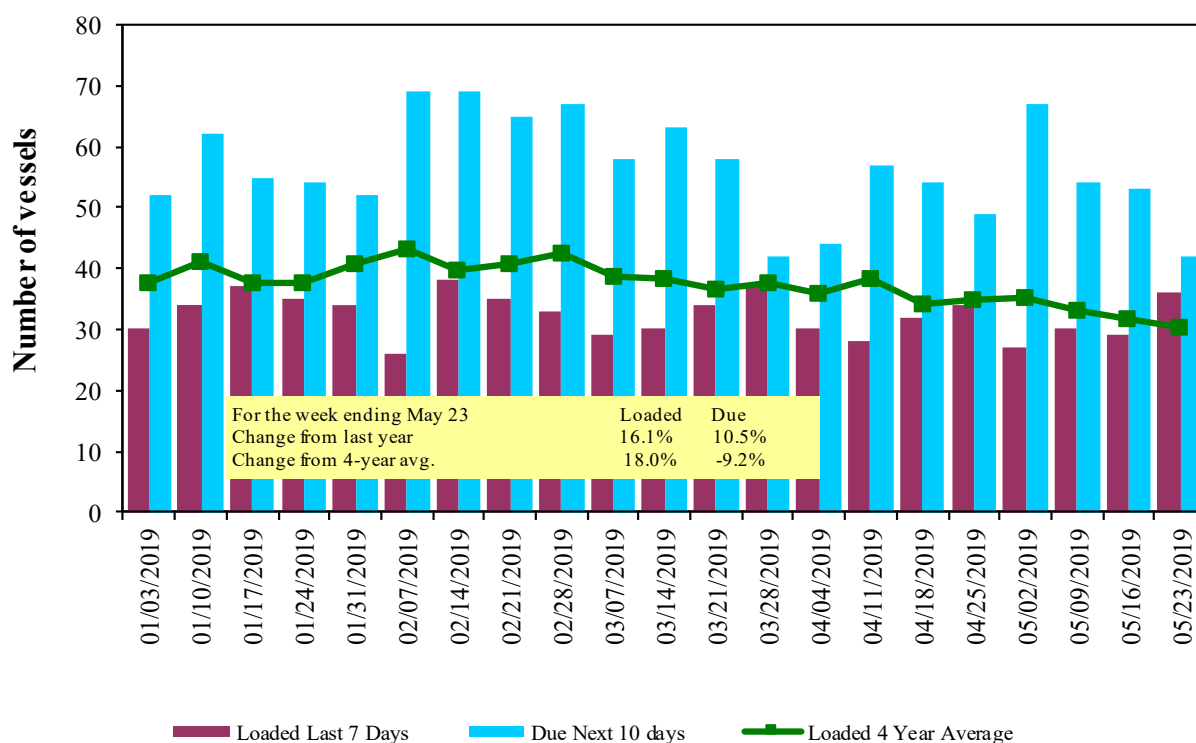
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
5/23/2019	39	36	42	12
5/16/2019	37	29	53	14
2018 range	(23..88)	(24..41)	(38..67)	(4..30)
2018 avg.	40	34	54	17

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

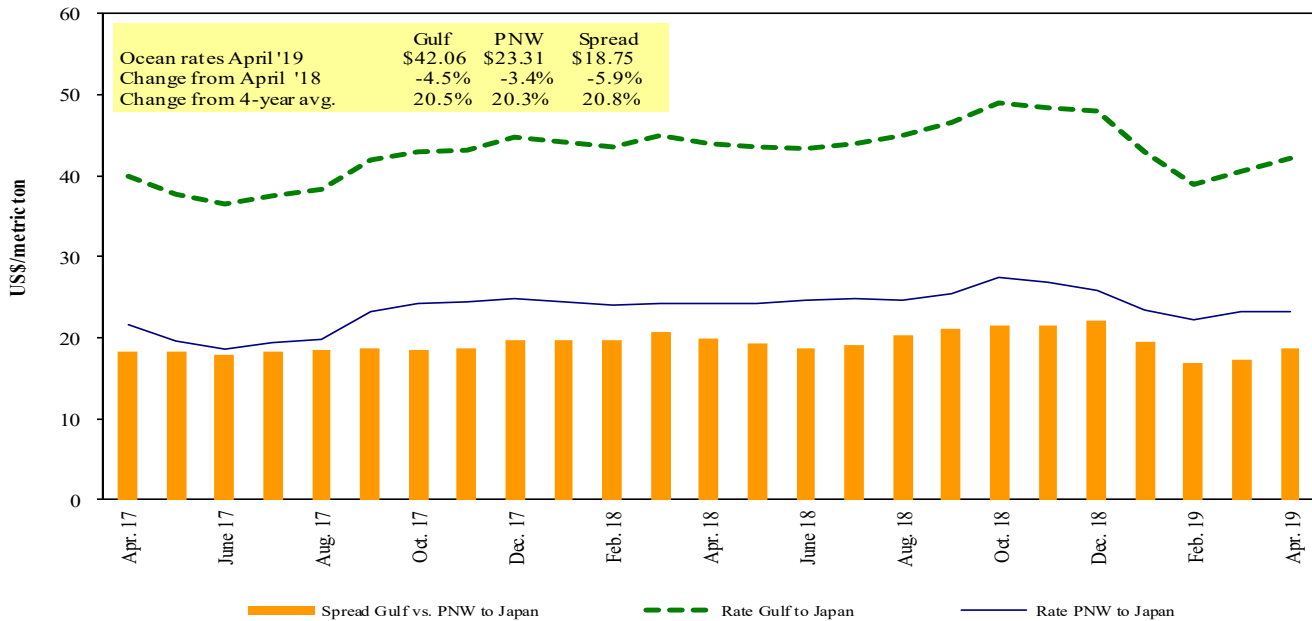
U.S. Gulf Vessel Loading Activity



Source: Transportation & Marketing Program/AMS/USDA
 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 05/25/2019

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jun 1/30	63,000	42.00
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*
Brazil	China	Heavy Grain	Jun 10/20	65,000	33.00
Brazil	China	Heavy Grain	Apr 20/May 5	63,000	33.00
Brazil	China	Heavy Grain	Apr 15/30	63,000	32.50
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
River Plate	China	Heavy Grain	Apr 21/30	65,000	37.85

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

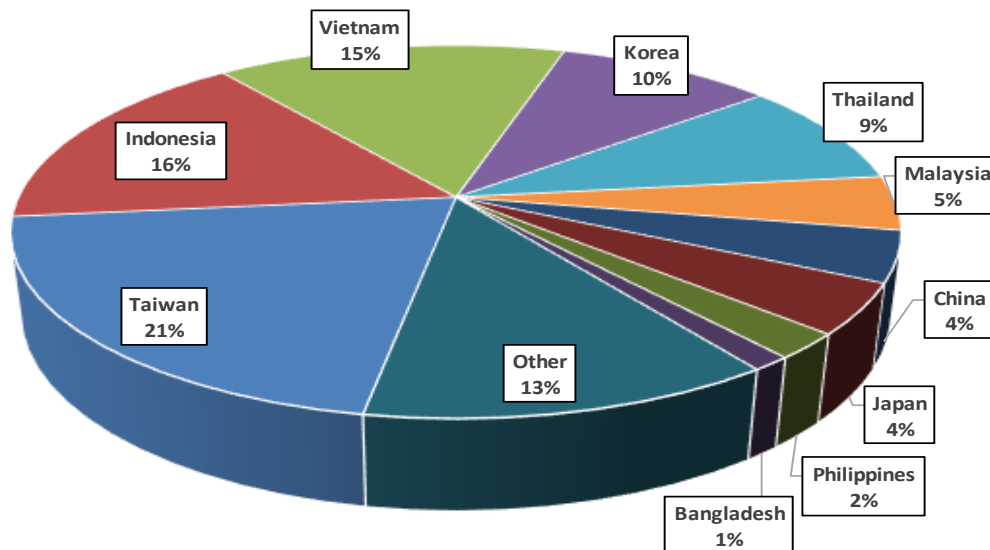
* 50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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, 2018

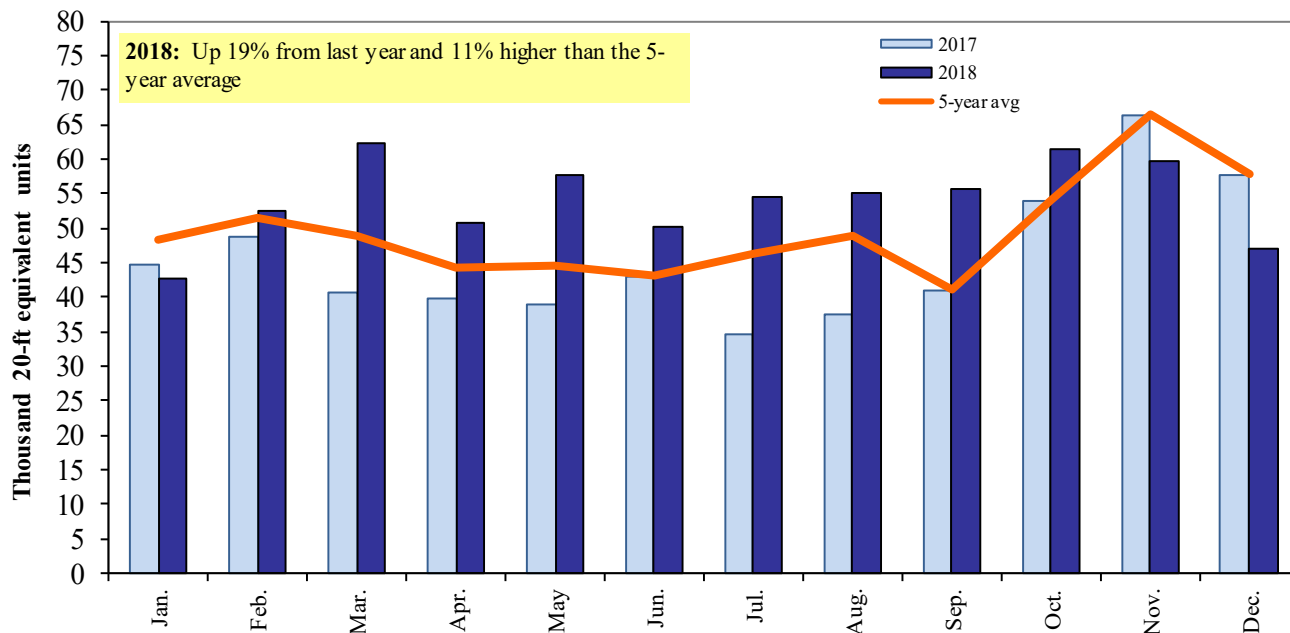


Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 1001, 100190, 1002, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 1102, 110100, 230310, 110220, 110290, 1201, 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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