United States Department of Agriculture

Grain Transportation Report

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

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September 5, 2019

Contents

The next release is September 12, 2019

WEEKLY HIGHLIGHTS

Secretary Perdue Highlights Importance of Inland Waterways

On August 28, Secretary Sonny Perdue toured the Melvin Price Locks and Dam (north of St. Louis) with Assistant Secretary for the Army for Civil Works, Rickey Dale "R.D." James, to discuss the importance of waterways to the competitiveness of agriculture and the economy. He presented a summary of an AMS-sponsored report modeling the economic impacts under three scenarios of investment in the country's waterways system: one with maintenance and construction funding kept at the current budget level; one with increased investment in construction and maintenance; and one with a reduced budget. The report's findings suggest that increased investment is necessary for U.S. exports to remain globally competitive. Year-to-date (YTD) grain shipments for 2019 are only 68 percent of the 2018 **YTD total**, due in large part to navigational challenges. See the press release and the full report for more information.

Weekly Soybean Inspections Highest Since November

For the week ending August 29, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.25 million metric tons (mmt). This amount is up 3 percent from the previous week, down 14 percent from last year, and 12 percent below the 3-year average. The increase was driven by a 33 percent jump in soybean inspections, which were the highest since early November. Soybeans destined to China were the highest since February 2018. Wheat inspections increased 4 percent from the past week, while corn inspections dropped 45 percent due to lower shipments to Asia and Latin America. Grain inspections decreased 16 percent from the previous week in the Pacific Northwest (PNW) but remained unchanged in the Mississippi Gulf.

Carriers and Shippers Prepare for New IMO 2020 Mandate

Ocean container carriers and shippers are preparing for increased fuel costs in the fourth quarter, as carriers begin using low-sulfur bunker fuel required by the International Maritime Organization (IMO) 2020 mandate effective January 1, 2020. To meet compliance by the beginning of the year, carriers will begin using the low-sulfur fuel and charging additional surcharges as of October 1. The Journal of Commerce recently reported surcharges ranging from $164 to $375 per 40ft container for shipments through west coast ports and $276 to $625 for shipments through east coast ports. The article further reports the price of the low sulfur fuel is currently more than 30 percent more than the heavy fuel oil currently used. "But shippers believe prices will change rapidly amid more widespread demand for low-sulfur fuel later in the fourth quarter…."

Snapshots by Sector

Export Sales

For the week ending August 22, **unshipped balances** of wheat, corn, and soybeans totaled 10.5 mmt. This indicates a 14 percent decrease in outstanding sales, compared to the same time last year. Net **corn export sales** were negative .003 mmt, down significantly from the previous week. Net **soybean export sales** were .095 mmt, up noticeably from the past week. Net weekly **wheat export sales** reached .662 mmt, up 11 percent from the from the previous week.

Rail

U.S. Class I railroads originated 21,209 **grain carloads** during the week ending August 24. This is a 7 percent increase from the previous week, 4 percent less than last year, and unchanged from the 3-year average.

Average September shuttle **secondary railcar** bids/offers (per car) were $288 below tariff for the week ending August 29. This is $156 less than last week and $277 lower than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending August 31, **barge grain movements** totaled 728,200 tons. This is an 18 percent decrease from the previous week and 30 percent less than the same period last year.

For the week ending August 31, 465 grain barges **moved down river**. This is 99 fewer barges than the previous week. There were 642 grain barges **unloaded in New Orleans**, 7 percent more than the previous week.

Ocean

For the week ending August 29, 35 **ocean-going grain vessels** were loaded in the Gulf. This is 5 percent fewer than the same period last year. Forty-six vessels are expected to be loaded within the next 10 days. This is 19 percent fewer than the same period last year.

As of August 29, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $51.75. This is 1 percent more than the previous week. The rate from the PNW to Japan was $29.25 per mt, 3 percent more than the previous week.

Fuel

For the week ending September 2, the U.S. average **diesel fuel price** decreased 0.7 cents from the previous week to $2.976 per gallon. This price is 27.6 cents less than the same week last year.

Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* September 5, 2019.
Web: http://dx.doi.org/10.9752/TS056.09-05-2019

Soybean Landed Costs Decreased During the Second Quarter 2019

Despite mixed transportation costs, lower farm values pushed down soybean landed costs in both the United States and Brazil during the second quarter, compared to the previous quarter. The landed costs of shipping soybeans from Minneapolis, MN and Davenport, IA to Hamburg, Germany through the U.S. Gulf declined 3 and 4 percent, respectively, from the previous quarter (table 1). The landed costs of shipping soybeans from the same origins to Shanghai, China decreased 2 and 3 percent, respectively, from the previous quarter (table 2). Soybean landed costs from Fargo, ND and Sioux Falls, SD to Shanghai, China fell 3 percent from the previous quarter (table 2). Similarly, the landed costs for shipping soybeans from North Mato Grosso (North MT) and South Goiás (South GO), Brazil to Hamburg, Germany fell 3 and 5 percent, respectively, from the previous quarter. The landed costs from the same locations to Shanghai, China declined also by 3 and 5 percent, respectively, during the quarter.

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

	2018 2nd qtr.	2019 1st qtr.	2019 2nd qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2018 2nd qtr.	2019 1st qtr.	2019 2nd qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr
	United States (via U.S. Gulf)									
	Minneapolis, MN --$/mt--					Davenport, IA --$/mt--				
Truck	12.06	8.78	10.98	-8.96	25.06	12.06	8.78	10.98	-8.96	25.06
Rail[1]		47.98	47.93		-0.10		32.13	32.11		-0.06
Barge	38.14	16.98	13.06	-65.76	-23.09	30.79	16.98	13.06	-57.58	-23.09
Ocean[2]	20.67	16.73	16.62	-19.59	-0.66	20.67	16.73	16.62	-19.59	-0.66
Total transportation	70.87	90.47	88.59	25.00	-2.08	63.52	74.62	72.77	14.56	-2.48
Farm Value[3]	348.21	310.24	298.97	-14.14	-3.63	353.35	311.59	299.09	-15.36	-4.01
Landed Cost[4]	419.08	400.71	387.56	-7.52	-3.28	416.87	386.21	371.86	-10.80	-3.72
Transport % of landed cost	16.91	22.58	22.86			15.24	19.32	19.57		
	Brazil									
	North MT[5] - Santos[6] --$/mt--					South GO[5] - Paranagua[6] --$/mt--				
Truck	101.44	81.92	73.96	-27.09	-9.72	59.89	44.66	43.76	-26.93	-2.02
Ocean[7]	25.00	23.00	21.50	-14.00	-6.52	26.00	23.00	21.25	-18.27	-7.61
Total transportation	126.44	104.92	95.46	-24.50	-9.02	85.89	67.66	65.01	-24.31	-3.92
Farm Value[8]	323.46	275.38	271.70	-16.00	-1.34	313.65	296.01	281.40	-10.28	-4.94
Landed Cost	449.90	380.30	367.16	-18.39	-3.46	399.54	363.67	346.41	-13.30	-4.75
Transport % of landed cost	28.10	27.59	26.00			21.50	18.60	18.77		

[1]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.
[2]Source: O'Neil Commodity Consulting
[3]Source: USDA/NASS
[4]Landed cost is total cost plus farm value
[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

The decrease in the U.S. landed costs was caused by a combination of reduced farm values and transportation costs for the shipments to Europe. However, the reduction in the landed costs for shipments to China was caused primarily by falling farm values. Both transportation costs and farm values also fell in Brazil. For the U.S. shipments to Europe, the decline in barge and ocean freight rates more than offset the increase in truck rates, lowering the transportation costs. Barge rates fell due to reduced demand for barge services from persistent flooding and navigation disruptions during the quarter (see April 4, 2019 and June 27, 2019 *Grain Transportation Reports (GTR)*). However, ocean freight rates from the United States to China increased during the quarter, primarily due to strong demand for coal and iron ore (July 25, 2019 *GTR*). Increased truck and ocean freight rates pushed up transportation costs for China-bound soybeans during the quarter.

The landed costs from the United States to Hamburg, Germany ranged from $372 to $388 per metric ton (mt) (table 1) and $368 to $413 per mt to Shanghai, China (table 2). The landed costs from Brazil to Hamburg, Germany ranged from $346 to $367 per mt (table 1) and $357 to $377 per mt to Shanghai, China (table 2). The U.S. transportation share of the landed costs increased slightly due to the fall in the soybean farm values. The U.S. transportation share of the landed costs to Hamburg, Germany ranged from 20 to 21 percent (table 1) and 24 to 28 percent to Shanghai, China (table 2). Brazil's transportation share of the landed costs to Hamburg, Germany ranged from 19 to 26 percent (table 1), and 21 to 28 percent to Shanghai, China (table 2). In general, year-to-year landed costs fell in both the United States and Brazil as soybean values significantly declined from a year earlier.

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

	2018	2019	2019	Percent change		2018	2019	2019	Percent change	
	2nd qtr.	1st qtr.	2nd qtr.	Yr. to Yr.	Qtr. to Qtr.	2nd qtr.	1st qtr.	2nd qtr.	Yr. to Yr.	Qtr. to Qtr.
	United States (via U.S. Gulf)									
	Minneapolis, MN					Davenport, IA				
	--$/mt--					--$/mt--				
Truck	12.06	8.78	10.98	-8.96	25.06	12.06	8.78	10.98	-8.96	25.06
Rail[1]		47.98	47.93		-0.10		32.13	32.11		-0.06
Barge	38.14	16.98	13.06	-65.76	-23.09	30.79	16.98	13.06	-57.58	-23.09
Ocean[2]	42.69	39.61	42.20	-1.15	6.54	42.69	39.61	42.20	-1.15	6.54
Total transportation	92.89	113.35	114.17	22.91	0.72	85.54	97.50	98.35	14.98	0.87
Farm Value[3]	348.21	310.24	298.97	-14.14	-3.63	353.35	311.59	299.09	-15.36	-4.01
Landed Cost[4]	441.10	423.59	413.14	-6.34	-2.47	438.89	409.09	397.44	-9.44	-2.85
Transport % of landed cost	21.06	26.76	27.63			19.49	23.83	24.75		
	Via PNW									
	Fargo, ND					Sioux Falls, SD				
Truck	12.06	8.78	10.98	-8.96	25.06	12.06	8.78	10.98	-8.96	25.06
Rail	54.62	56.11	56.11	2.73	0.00	55.61	57.10	57.10	2.68	0.00
Ocean	23.72	22.44	22.93	-3.33	2.18	23.72	22.44	22.93	-3.33	2.18
Total transportation	90.40	87.33	90.02	-0.42	3.08	91.39	88.32	91.01	-0.42	3.05
Farm Value	339.39	290.28	277.90	-18.12	-4.26	344.90	296.64	284.15	-17.61	-4.21
Landed Cost	429.79	377.61	367.92	-14.40	-2.57	436.29	384.96	375.16	-14.01	-2.55
Transport % of landed cost	21.03	23.13	24.47			20.95	22.94	24.26		
	Brazil									
	North MT[5] - Santos[6]					South GO[5] - Paranagua[6]				
	--$/mt--					--$/mt--				
Truck	101.44	81.92	73.96	-27.09	-9.72	59.89	44.66	43.76	-26.93	-2.02
Ocean[7]	31.00	32.25	30.92	-0.26	-4.12	32.00	33.75	31.42	-1.81	-6.90
Total transportation	132.44	114.17	104.88	-20.81	-8.14	91.89	78.41	75.18	-18.18	-4.12
Farm Value[8]	323.46	275.38	271.70	-16.00	-1.34	313.65	296.01	281.40	-10.28	-4.94
Landed Cost	455.90	389.55	376.58	-17.40	-3.33	405.54	374.42	356.58	-12.07	-4.76
Transport % of landed cost	29.05	29.31	27.85			22.66	20.94	21.08		

[1]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.
[2]Source: O'Neil Commodity Consulting
[3]Source: USDA/NASS
[4]Landed cost is transportation cost plus farm value
[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

According to USDA's grain inspection data, China imported 3.54 million metric tons (mmt) of U.S. soybeans during the second quarter of 2019, compared to 4.61 mmt in the previous quarter, and 1.34 mmt during the same period in 2018. Although second quarter 2019 imports were 23 percent less than the previous quarter, they were about 3 times more than the second quarter of 2018. In addition to all other economic factors, the current low soybean farm prices could boost the competitiveness of U.S exports to China. surajudeen.olowolayemo@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
09/04/19	200	n/a	208	244	231	207
08/28/19	200	n/a	215	260	228	202

[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)
n/a = not available
Source: Transportation & Marketing Program/AMS/USDA

Table 2

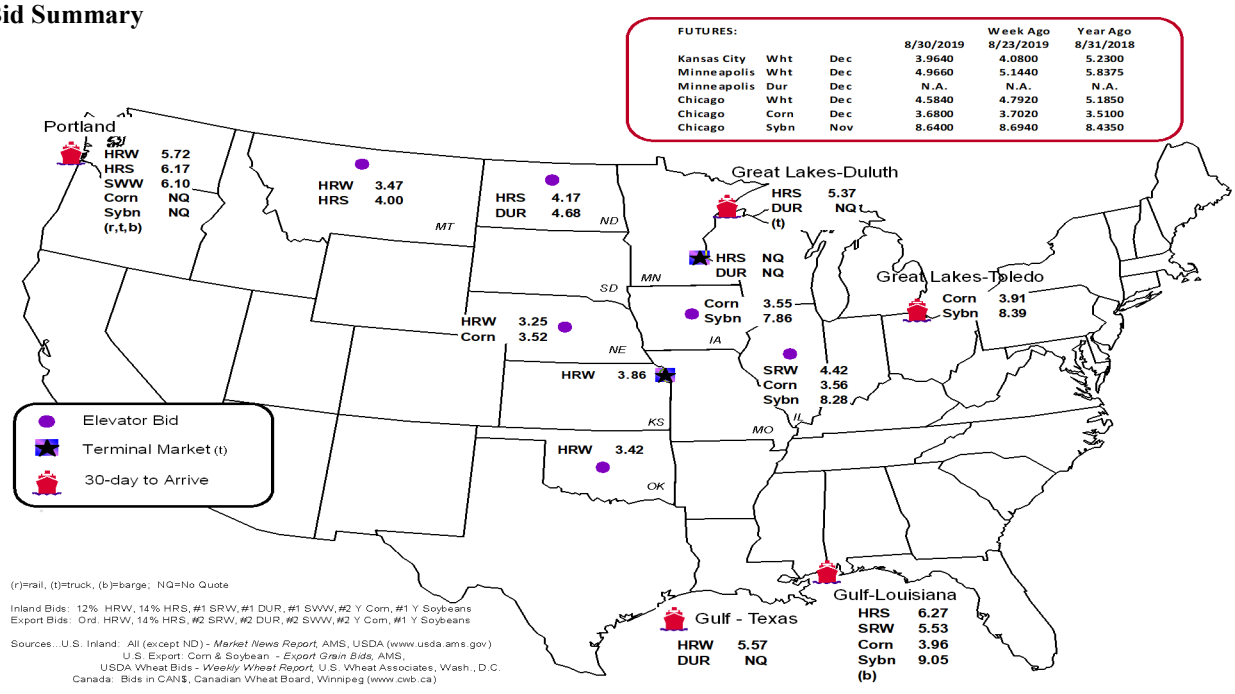
Market Update: U.S. Origins to Export Position Price Spreads ($/bushel)

Commodity	Origin--Destination	8/30/2019	8/23/2019
Corn	IL--Gulf	-0.40	-0.38
Corn	NE--Gulf	-0.44	-0.43
Soybean	IA--Gulf	-1.19	-1.26
HRW	KS--Gulf	-1.71	-1.67
HRS	ND--Portland	-2.00	-1.92

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]
8/28/2019[p]	890	798	3,943	361		8/24/2019	2,239
8/21/2019[r]	690	1,111	4,318	385	6,504	8/17/2019	2,827
2019 YTD[r]	33,269	39,702	175,385	12,897	261,253	2019 YTD	82,423
2018 YTD[r]	14,298	36,372	228,863	14,172	293,705	2018 YTD	80,512
2019 YTD as % of 2018 YTD	233	109	77	91	89	% change YTD	102
Last 4 weeks as % of 2018[2]	127	155	73	196	88	Last 4wks % 2018	105
Last 4 weeks as % of 4-year avg.[2]	133	81	88	183	94	Last 4wks % 4 yr	124
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.

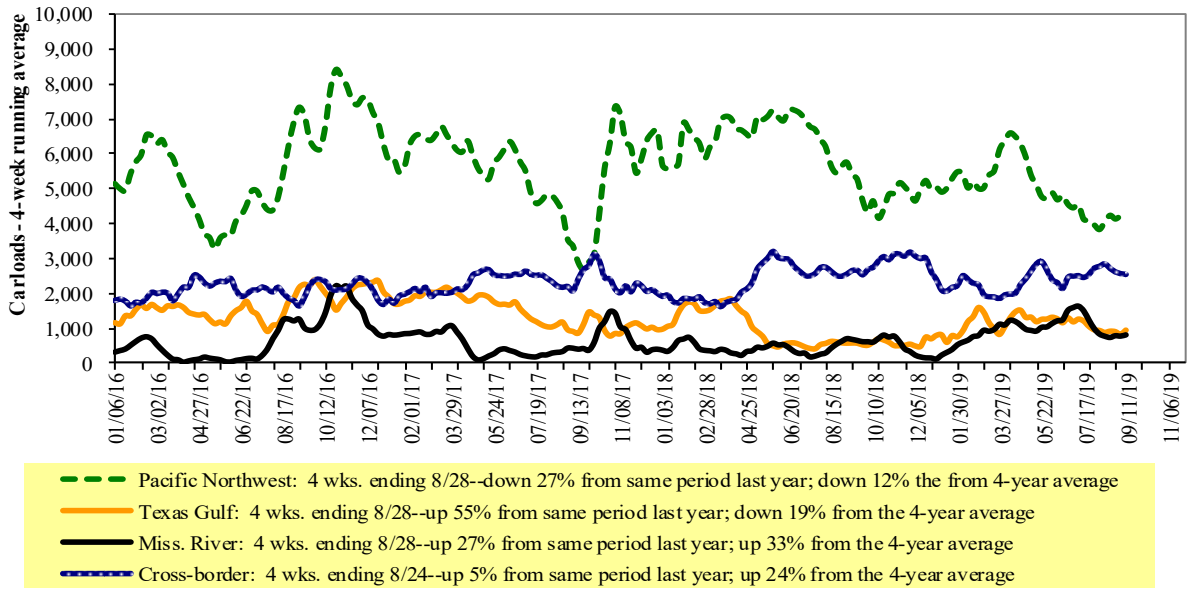
[3] Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads to reflect switching between KCSM and Grupo Mexico.

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	
8/24/2019	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,826	2,241	11,514	1,276	4,352	21,209	3,631	4,274
This week last year	1,460	2,266	12,454	823	5,090	22,093	5,110	5,135
2019 YTD	62,867	96,649	376,804	38,147	174,652	749,119	141,666	149,279
2018 YTD	65,888	87,568	424,547	32,541	177,888	788,432	129,485	158,252
2019 YTD as % of 2018 YTD	95	110	89	117	98	95	109	94
Last 4 weeks as % of 2018*	84	102	89	123	92	92	69	94
Last 4 weeks as % of 3-yr avg.**	105	105	94	131	87	96	77	94
Total 2018	98,978	133,190	635,458	48,638	267,713	1,183,977	211,795	244,697

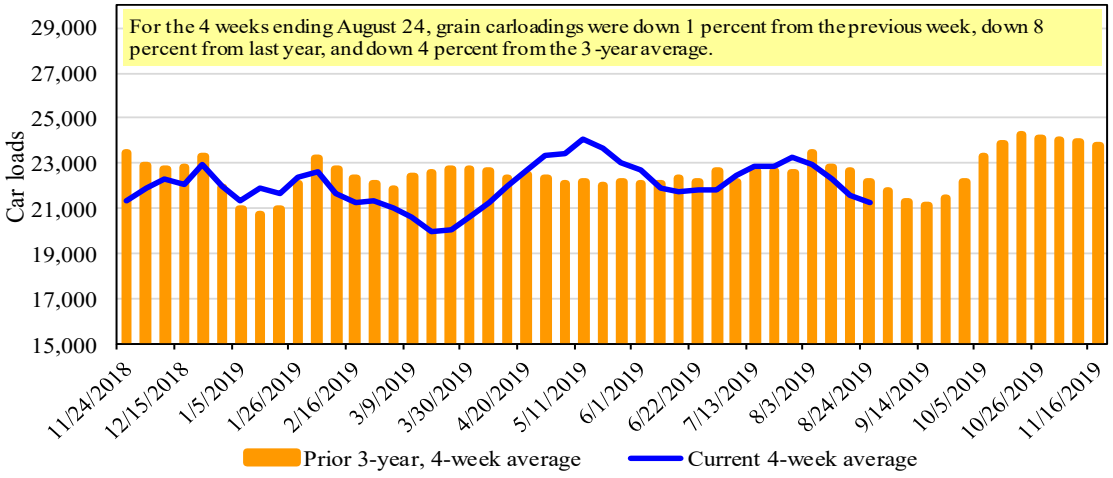
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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							
8/29/2019		Sep-19	Sep-18	Oct-19	Oct-18	Nov-19	Nov-18	Dec-19	Dec-18
BNSF[3]	COT grain units	0	0	0	0	no bid	no bids	no bid	no bids
	COT grain single-car[5]	0	200	10	198	9	184	12	180
UP[4]	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no bid	no offer	no bid	no offer	no offer	no offer	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.

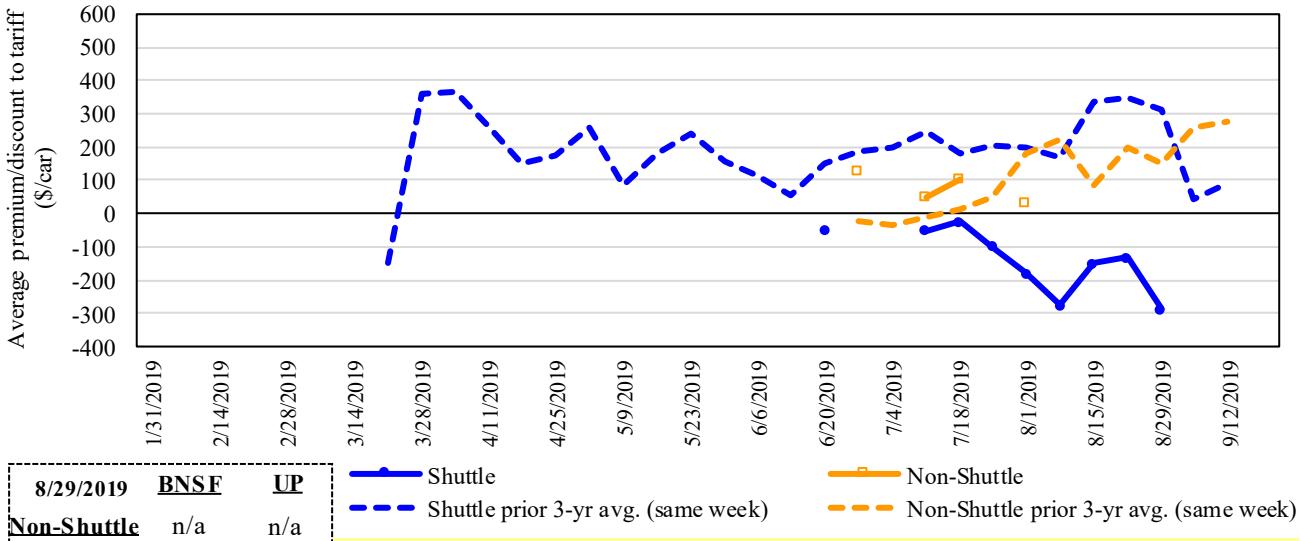
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

[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 September 2019, Secondary Market

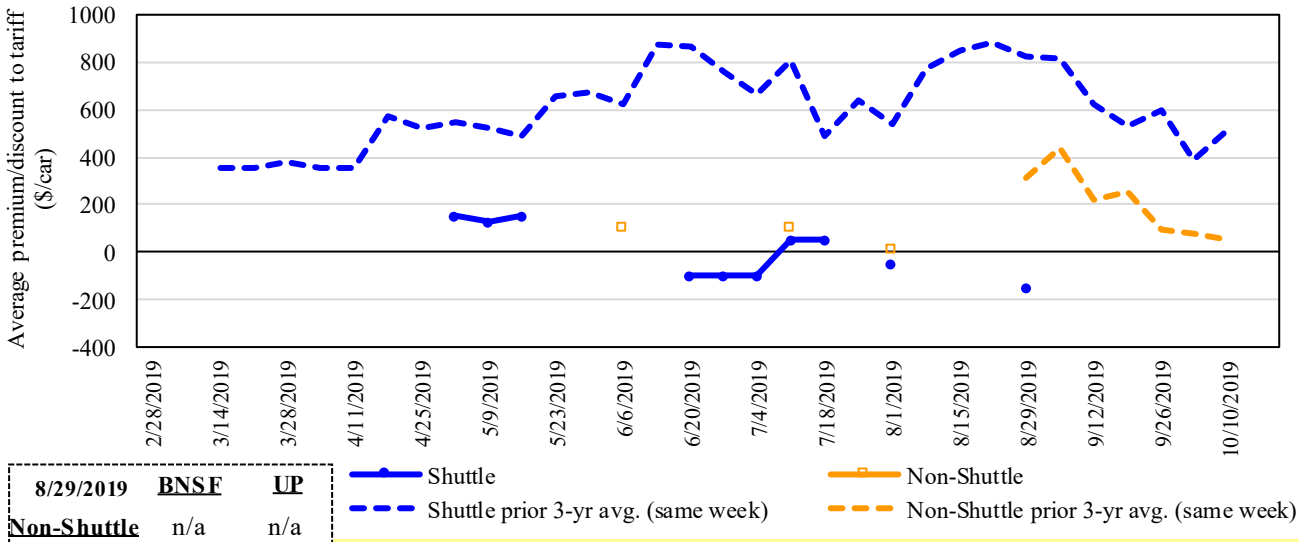


8/29/2019	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	-$338	-$238

There were no Non-Shuttle bids/offers this week.
Average Shuttle bids/offers fell $156 this week and are $263 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 October 2019, Secondary Market



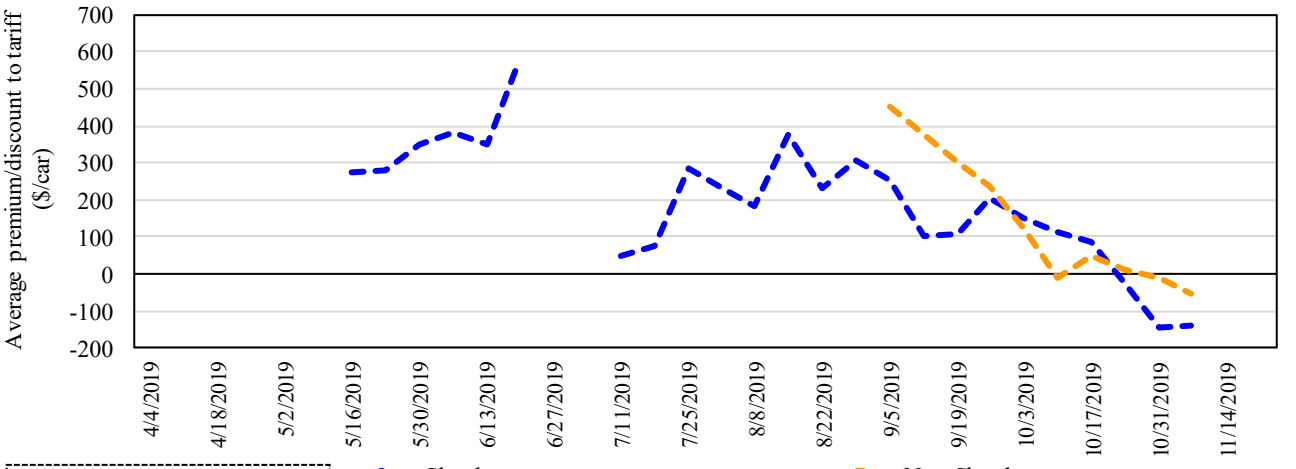
8/29/2019	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	-$150

There were no Non-Shuttle bids/offers this week.
There were no Shuttle bids/offers last week. Average Non-Shuttle bids/offers this week are $300 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 November 2019, Secondary Market



8/29/2019	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	n/a

There were no Non-Shuttle bids/offers this week.
There were no Shuttle bids/offers this week.

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

Table 6

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

	For the week ending: 8/29/2019	Delivery period					
		Sep-19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20
Non-shuttle	**BNSF-GF**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**(338)**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(188)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	(379)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**(238)**	**(150)**	**n/a**	**(300)**	**n/a**	**n/a**
	Change from last week	(125)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	(175)	(350)	n/a	(375)	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]

September, 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	$96	$40.51	$1.10	0
	Grand Forks, ND	Duluth-Superior, MN	$4,333	$0	$43.03	$1.17	2
	Wichita, KS	Los Angeles, CA	$7,240	$0	$71.90	$1.96	1
	Wichita, KS	New Orleans, LA	$4,525	$169	$46.61	$1.27	-1
	Sioux Falls, SD	Galveston-Houston, TX	$6,976	$0	$69.28	$1.89	1
	Northwest KS	Galveston-Houston, TX	$4,801	$185	$49.52	$1.35	-1
	Amarillo, TX	Los Angeles, CA	$5,121	$258	$53.41	$1.45	-1
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,800	$191	$39.63	$1.01	-4
	Toledo, OH	Raleigh, NC	$6,581	$0	$65.35	$1.66	4
	Des Moines, IA	Davenport, IA	$2,114	$40	$21.39	$0.54	-7
	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	$3,660	$119	$37.53	$0.95	1
	Des Moines, IA	Los Angeles, CA	$5,520	$346	$58.26	$1.48	2
Soybeans	Minneapolis, MN	New Orleans, LA	$3,631	$186	$37.91	$1.03	-13
	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	$4,545	$191	$47.03	$1.28	-5
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$4,143	$0	$41.14	$1.12	2
	Wichita, KS	Galveston-Houston, TX	$4,361	$0	$43.31	$1.18	2
	Chicago, IL	Albany, NY	$5,896	$0	$58.55	$1.59	4
	Grand Forks, ND	Portland, OR	$5,801	$0	$57.61	$1.57	1
	Grand Forks, ND	Galveston-Houston, TX	$6,121	$0	$60.78	$1.65	1
	Northwest KS	Portland, OR	$6,012	$304	$62.72	$1.71	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	$3,720	$191	$38.84	$0.99	-1
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	5
	Des Moines, IA	Amarillo, TX	$4,060	$150	$41.80	$1.06	1
	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	0
	Minneapolis, MN	Portland, OR	$5,800	$0	$57.60	$1.57	0
	Fargo, ND	Tacoma, WA	$5,650	$0	$56.11	$1.53	0
	Council Bluffs, IA	New Orleans, LA	$4,775	$220	$49.61	$1.35	-1
	Toledo, OH	Huntsville, AL	$4,634	$0	$46.02	$1.25	6
	Grand Island, NE	Portland, OR	$5,710	$311	$59.79	$1.63	-1

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

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

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

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

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

Table 8

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

Date: September, 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	$7,509	$0	$76.72	$2.09	3
	OK	Cuautitlan, EM	$6,775	$132	$70.58	$1.92	0
	KS	Guadalajara, JA	$7,534	$594	$83.04	$2.26	5
	TX	Salinas Victoria, NL	$4,329	$81	$45.06	$1.23	0
Corn	IA	Guadalajara, JA	$8,828	$502	$95.33	$2.42	8
	SD	Celaya, GJ	$8,140	$0	$83.17	$2.11	6
	NE	Queretaro, QA	$8,207	$278	$86.69	$2.20	2
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	2
	MO	Tlalnepantla, EM	$7,573	$271	$80.15	$2.03	2
	SD	Torreon, CU	$7,690	$0	$78.57	$1.99	5
Soybeans	MO	Bojay (Tula), HG	$8,497	$475	$91.67	$2.49	5
	NE	Guadalajara, JA	$9,122	$497	$98.27	$2.67	5
	IA	El Castillo, JA	$9,390	$0	$95.94	$2.61	3
	KS	Torreon, CU	$7,914	$344	$84.37	$2.29	5
Sorghum	NE	Celaya, GJ	$7,787	$446	$84.12	$2.13	7
	KS	Queretaro, QA	$8,000	$165	$83.43	$2.12	2
	NE	Salinas Victoria, NL	$6,633	$133	$69.12	$1.75	2
	NE	Torreon, CU	$7,172	$316	$76.51	$1.94	6

[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

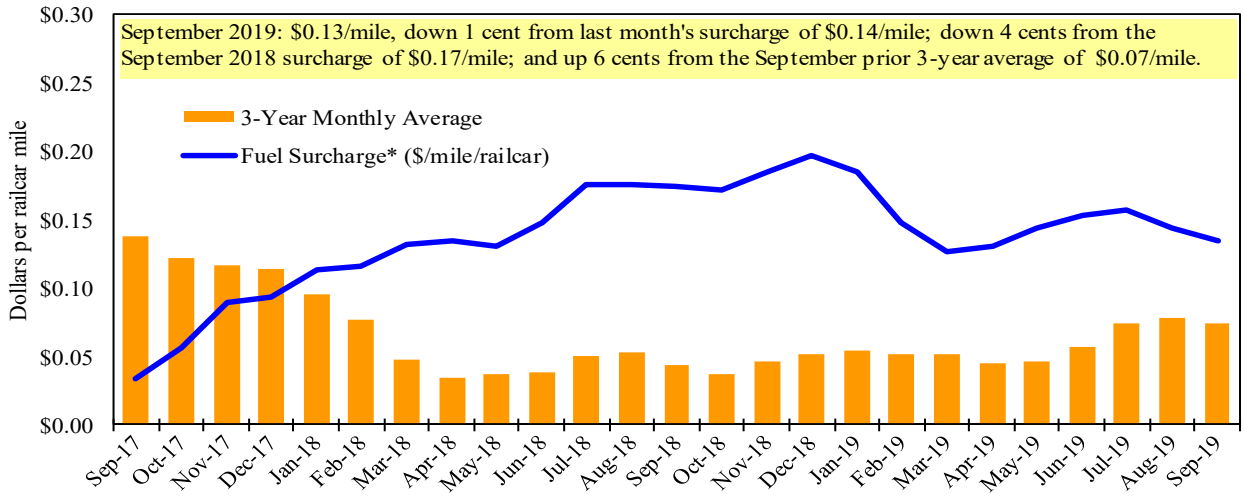
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[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.

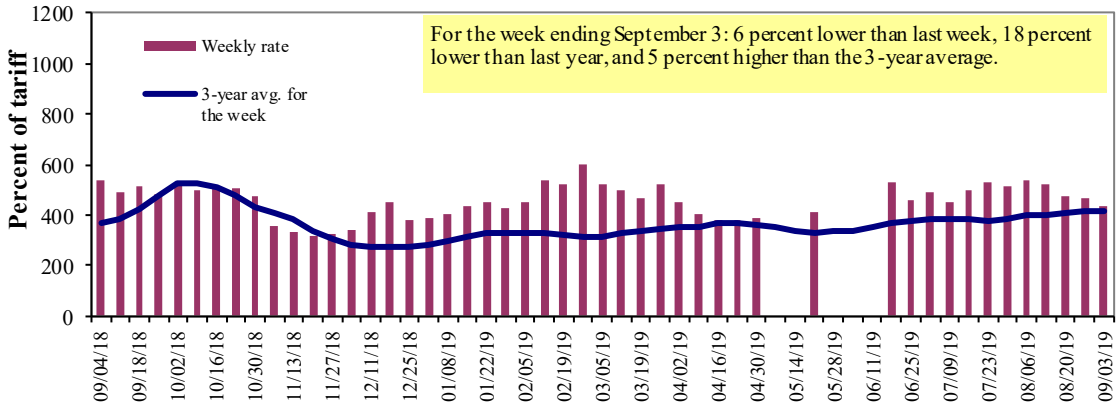
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

**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]	9/3/2019	417	428	439	346	341	341	360
	8/27/2019	445	465	468	387	350	350	375
$/ton	9/3/2019	25.81	22.77	20.37	13.81	15.99	13.78	11.30
	8/27/2019	27.55	24.74	21.72	15.44	16.42	14.14	11.78
Current week % change from the same week:								
	Last year	-27	-22	-18	-18	-35	-35	-13
	3-year avg. [2]	-8	0	5	17	-6	-6	26
Rate[1]	September	447	441	436	374	408	408	377
	November	-	388	367	283	319	319	261

[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
* - Current weekly rate is a nominal value, reflecting the anticipation of improved navigation conditions
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.

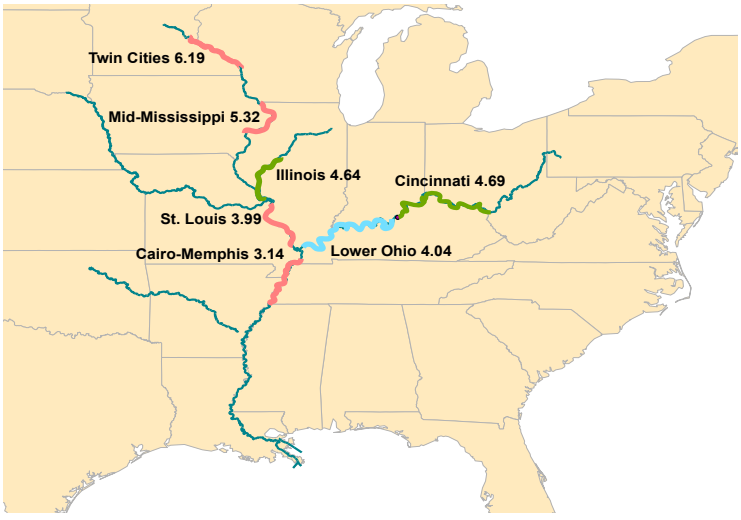
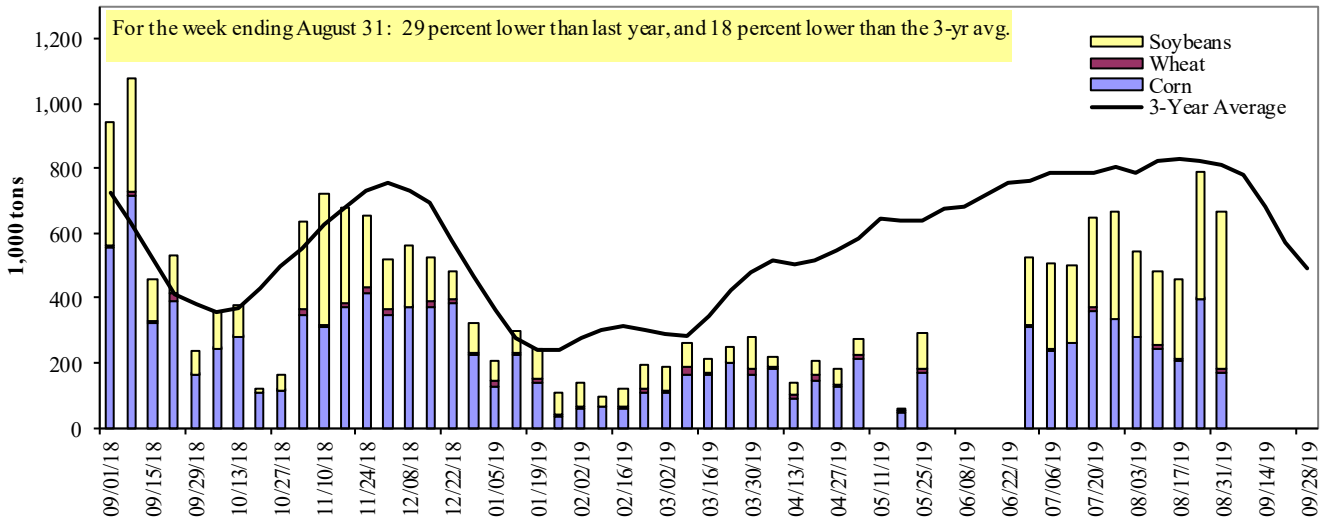


Figure 10

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 08/31/2019	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	42	0	138	0	180
Winfield, MO (L25)	131	11	399	3	544
Alton, IL (L26)	153	14	498	0	665
Granite City, IL (L27)	168	14	486	0	667
Illinois River (LAGRANGE)	41	3	150	0	194
Ohio River (OLMSTED)	4	9	37	0	50
Arkansas River (L1)	0	0	11	0	11
Weekly total - 2019	171	23	534	0	728
Weekly total - 2018	587	46	404	0	1,037
2019 YTD[1]	8,685	1,192	7,931	119	17,926
2018 YTD[1]	16,498	1,265	8,376	86	26,225
2019 as % of 2018 YTD	53	94	95	138	68
Last 4 weeks as % of 2018[2]	50	57	121	279	77
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.

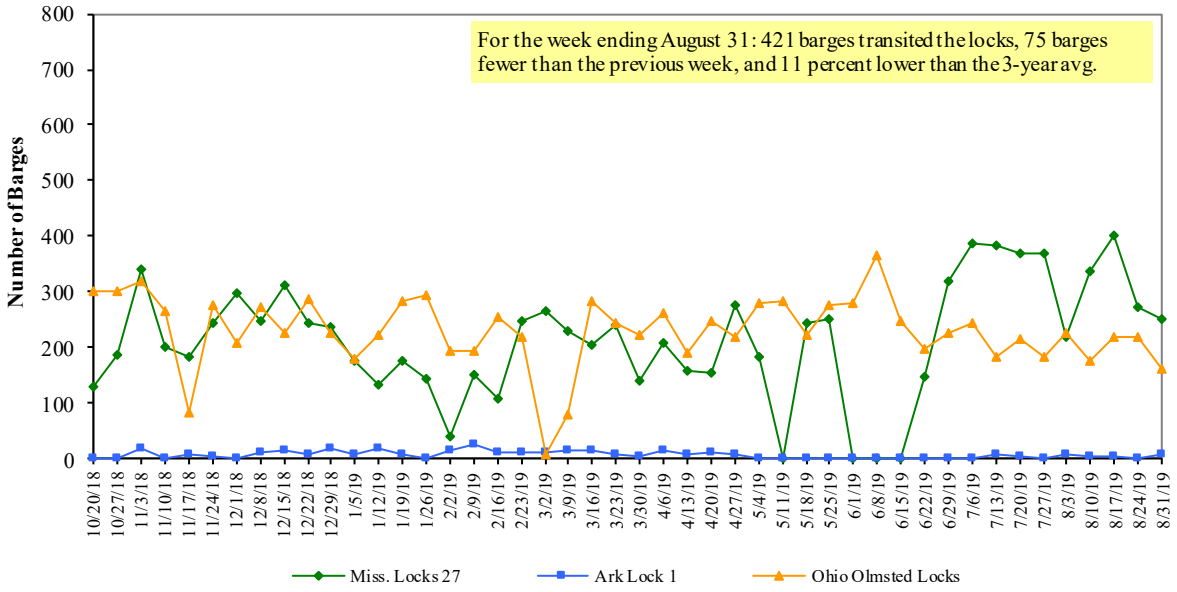
[2] As a percent of same period in 2018.

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

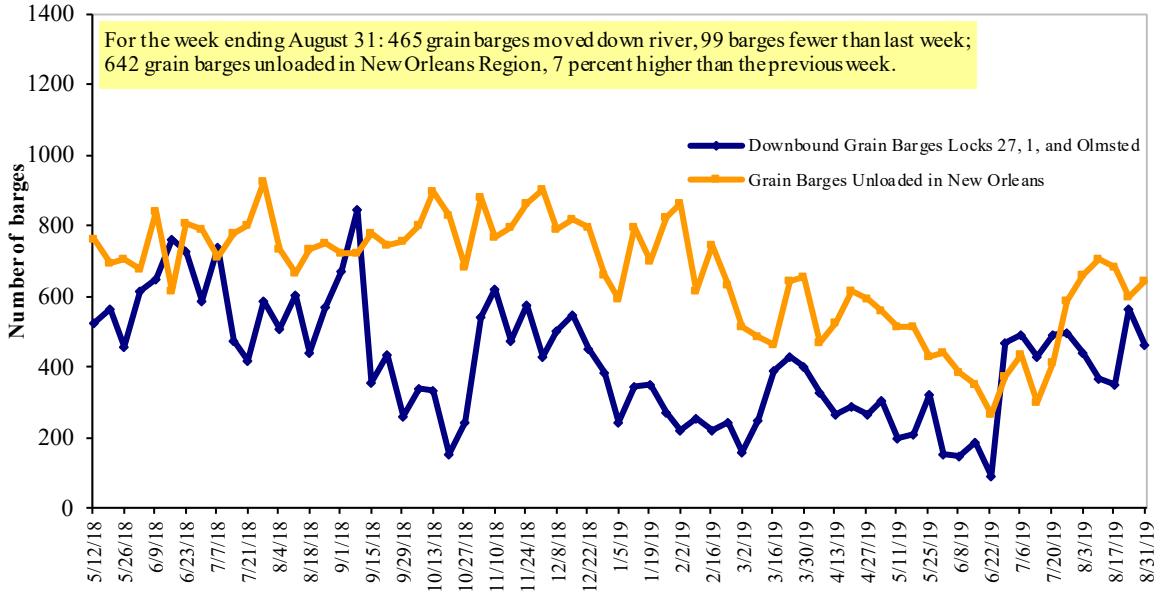
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 9/2/2019 (US $/gallon)

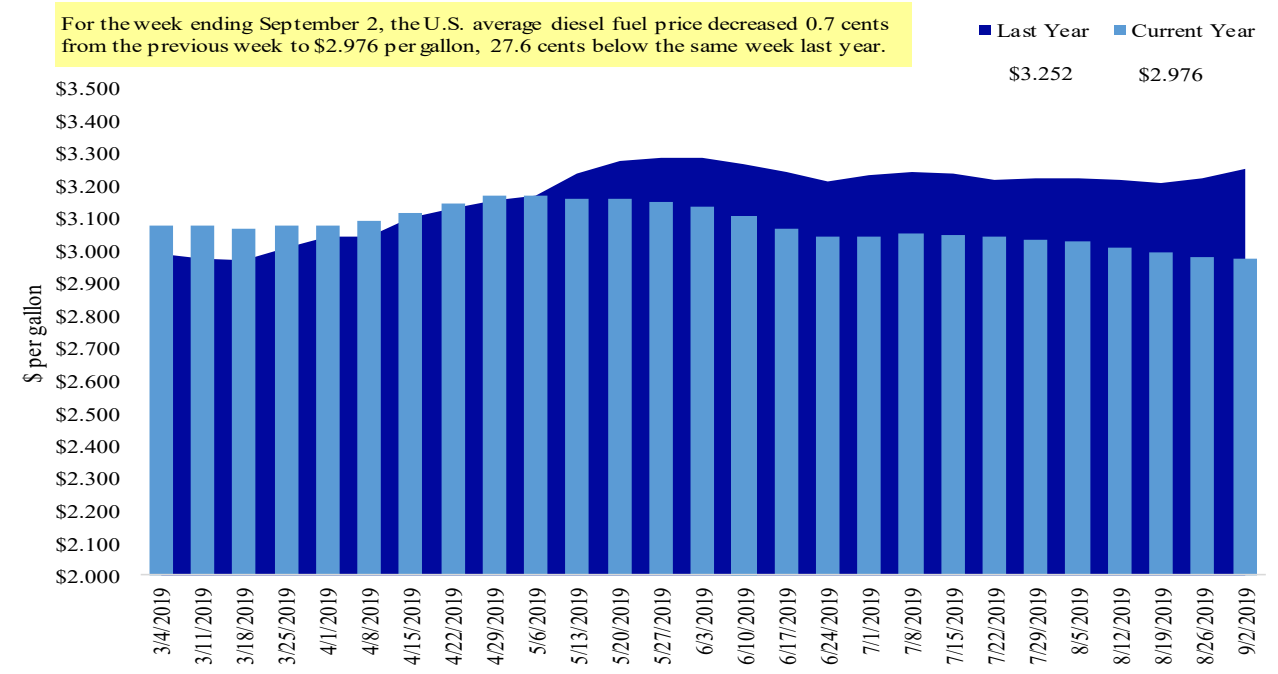
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.000	-0.003	-0.235
	New England	3.027	-0.004	-0.243
	Central Atlantic	3.178	-0.008	-0.221
	Lower Atlantic	2.874	0.000	-0.240
II	Midwest	2.874	-0.016	-0.317
III	Gulf Coast	2.740	-0.004	-0.295
IV	Rocky Mountain	2.924	-0.012	-0.440
V	West Coast	3.555	-0.001	-0.187
	West Coast less California	3.139	0.000	-0.330
	California	3.885	-0.002	-0.074
Total	U.S.	2.976	-0.007	-0.276

[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]									
8/22/2019	1,519	697	1,700	971	297	5,183	1,559	3,721	10,463
This week year ago	1,313	570	1,318	931	172	4,303	4,540	3,382	12,225
Cumulative exports-marketing year[2]									
2018/19 YTD	2,741	688	1,340	983	148	5,900	48,542	44,992	99,434
2017/18 YTD	1,264	604	1,407	1,348	46	4,668	56,001	55,415	116,084
YTD 2018/19 as % of 2017/18	217	114	95	73	325	126	87	81	86
Last 4 wks as % of same period 2017/18	114	126	121	105	182	118	53	153	104
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 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 8/22/2019	Total Commitments[2]			% change current MY from last MY	Exports[3] 3-year avg 2015-2017
	2019/20 Next MY	2018/19 Current MY	2017/18 Last MY		
		- 1,000 mt -			
Mexico	2,965	15,708	15,419	2	13,691
Japan	589	12,847	11,930	8	11,247
Korea	65	3,695	5,917	(38)	4,754
Colombia	53	4,683	4,879	(4)	4,678
Peru	0	1,992	3,293	(40)	2,975
Top 5 Importers	**3,673**	**38,924**	**41,439**	**(6)**	**37,344**
Total US corn export sales	**5,541**	**50,101**	**60,541**	**(17)**	**53,184**
% of Projected	10%	94%	98%		
Change from prior week[2]	**859**	**(2.6)**	**176**		
Top 5 importers' share of U.S. corn export sales	66%	78%	68%		70%
USDA forecast, August 2019	**54,707**	**53,435**	**62,036**	**(14)**	
Corn Use for Ethanol USDA forecast, August 2019	**139,065**	**137,795**	**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/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 8/22/2019	Total Commitments[2]			% change current MY from last MY	Exports[3] 3-yr avg. 2015-2017
	2019/20 Next MY	2018/19 Current MY	2017/18 Last MY		
		- 1,000 mt -			- 1,000 mt -
China	260	14,150	27,861	(49)	31,228
Mexico	1,053	4,967	4,500	10	3,716
Indonesia	54	2,423	2,775	(13)	2,250
Japan	207	2,663	2,364	13	2,145
Netherlands	0	2,111	2,544	(17)	2,209
Top 5 importers	**1,574**	**26,313**	**40,044**	**(34)**	**41,549**
Total US soybean export sales	**5,614**	**48,713**	**58,797**	**(17)**	**55,113**
% of Projected	12%	105%	101%		
Change from prior week[2]	**353**	**95**	**35**		
Top 5 importers' share of U.S. soybean export sales	28%	54%	68%		**75%**
USDA forecast, August 2019	**48,365**	**46,322**	**58,147**	**80**	

(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 8/22/2019	Total Commitments[2]		% change current MY from last MY	Exports[3] 3-yr avg 2015-2017
	2019/20 Current MY	2018/19 Last MY		
	- 1,000 mt -			- 1,000 mt -
Mexico	1,566	1,074	46	2,781
Japan	1,076	1,130	(5)	2,649
Philippines	1,252	1,403	(11)	2,441
Korea	630	677	(7)	1,257
Nigeria	710	416	71	1,254
Indonesia	304	273	11	1,076
Taiwan	555	389	43	1,066
China	61	0	n/a	944
Colombia	90	284	(68)	714
Thailand	371	404	(8)	618
Top 10 importers	**6,614**	**6,050**	9	**14,800**
Total US wheat export sales	**11,083**	**8,972**	**24**	**22,869**
% of Projected	42%	35%		
Change from prior week[2]	**662**	**415**		
Top 10 importers' share of U.S. wheat export sales	60%	67%		65%
USDA forecast, August 2019	**26,567**	**25,504**	**4**	

(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 08/29/19	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	280	310	91	9,191	8,659	106	102	107	13,315
Corn	0	0	n/a	6,858	15,026	46	0	0	20,024
Soybeans	279	352	79	7,050	6,078	116	295	277	7,719
Total	**559**	**662**	**84**	**23,099**	**29,762**	**78**	**82**	**86**	**41,058**
Mississippi Gulf									
Wheat	119	61	194	3,427	2,760	124	144	136	3,896
Corn	153	460	33	15,726	24,072	65	53	65	33,735
Soybeans	776	526	148	16,890	15,969	106	147	116	28,124
Total	**1,048**	**1,047**	**100**	**36,043**	**42,801**	**84**	**94**	**94**	**65,755**
Texas Gulf									
Wheat	95	55	173	4,777	2,158	221	381	68	3,198
Corn	42	32	129	531	566	94	95	61	730
Soybeans	0	0	n/a	2	69	2	0	0	69
Total	**137**	**87**	**157**	**5,310**	**2,793**	**190**	**207**	**66**	**3,997**
Interior									
Wheat	45	52	87	1,314	1,057	124	128	145	1,614
Corn	155	140	110	5,159	5,936	87	81	85	8,650
Soybeans	153	132	116	4,621	4,602	100	97	136	6,729
Total	**352**	**323**	**109**	**11,093**	**11,595**	**96**	**93**	**110**	**16,993**
Great Lakes									
Wheat	14	52	27	673	488	138	126	131	894
Corn	0	0	n/a	0	324	0	0	0	404
Soybeans	24	0	n/a	422	466	91	32	60	1,192
Total	**38**	**52**	**73**	**1,096**	**1,277**	**86**	**70**	**77**	**2,491**
Atlantic									
Wheat	1	2	33	34	67	51	691	72	69
Corn	0	3	0	94	67	140	n/a	24	138
Soybeans	117	7	n/a	982	1,394	70	234	278	2,047
Total	**117**	**11**	**n/a**	**1,110**	**1,529**	**73**	**241**	**223**	**2,253**
U.S. total from ports*									
Wheat	554	531	104	19,416	15,189	128	122	108	22,986
Corn	349	635	55	28,368	45,991	62	45	50	63,682
Soybeans	1,348	1,016	133	29,966	28,578	105	149	137	45,879
Total	**2,251**	**2,183**	**103**	**77,750**	**89,757**	**87**	**93**	**92**	**132,547**

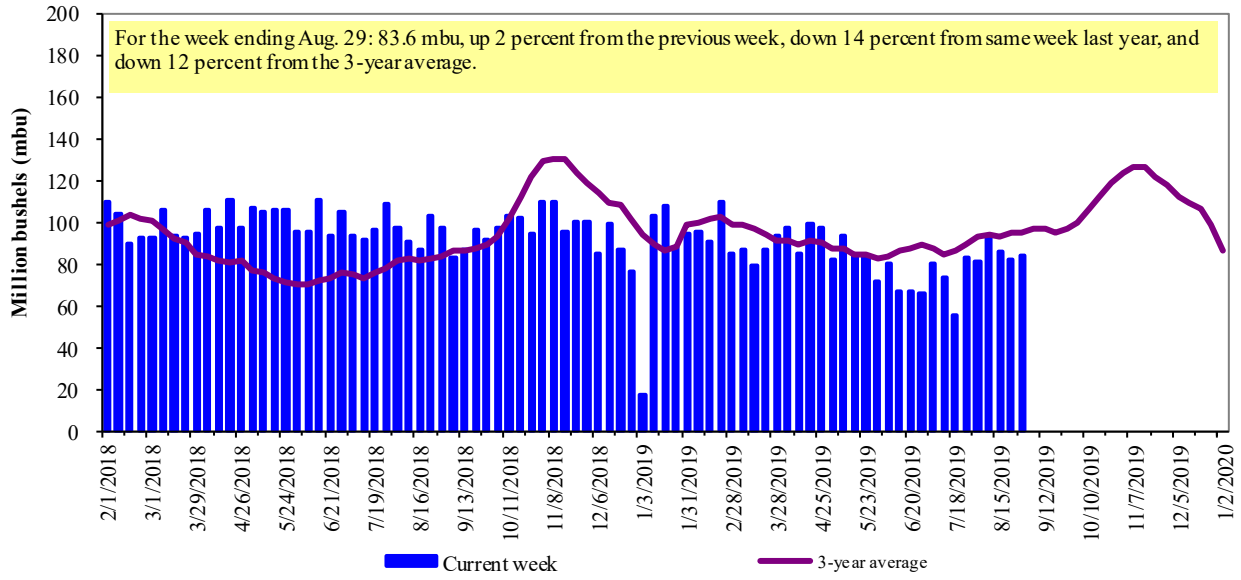
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

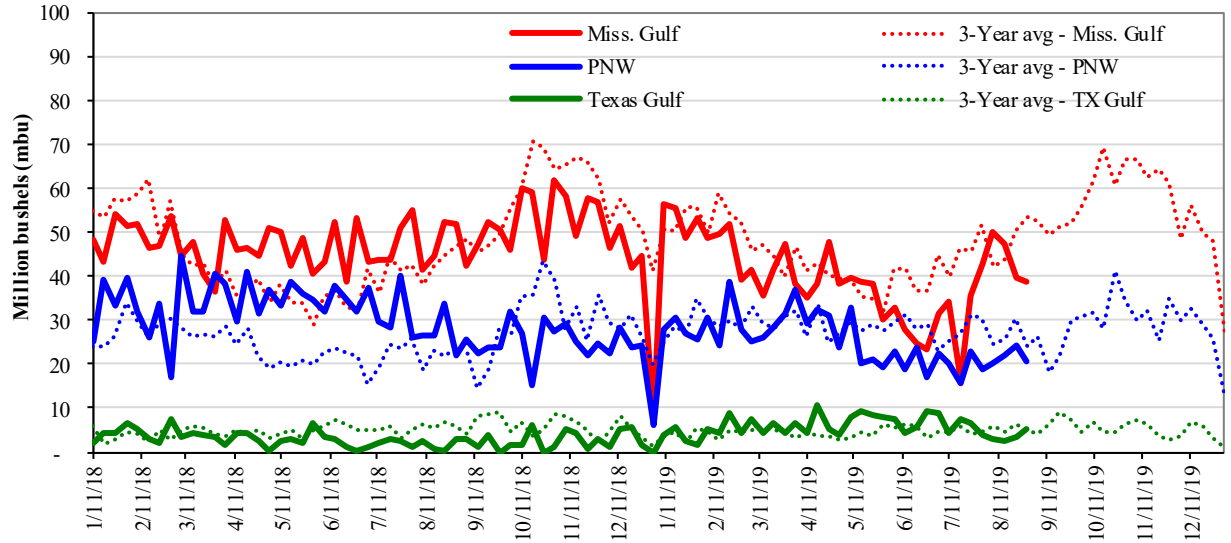
U.S. grain inspected for export (wheat, corn, and soybeans)



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 PNW[1] (wheat, corn, and soybeans)



Week ending 08/29/19 inspections (mbu):	
Mississippi Gulf:	38.9
PNW:	20.5
Texas Gulf:	5.1

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last Week:	down 2	up 56	up 2	down 16
Last Year (same week):	down 25	up 64	down 20	down 7
3-yr avg. (4-wk.mov. Avg):	down 18	down 6	down 17	down 22

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

Table 17

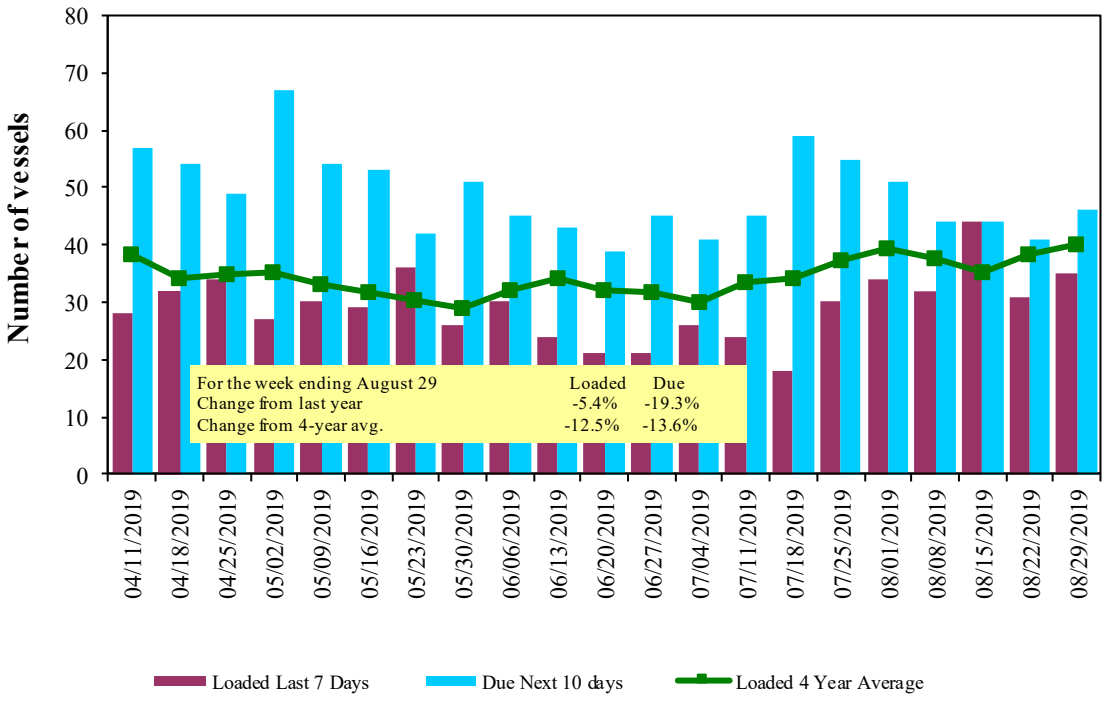
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
8/29/2019	33	35	46	10
8/22/2019	52	31	41	15
2018 range	(23..88)	(24..41)	(38..67)	(4..30)
2018 avg.	40	34	54	17

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

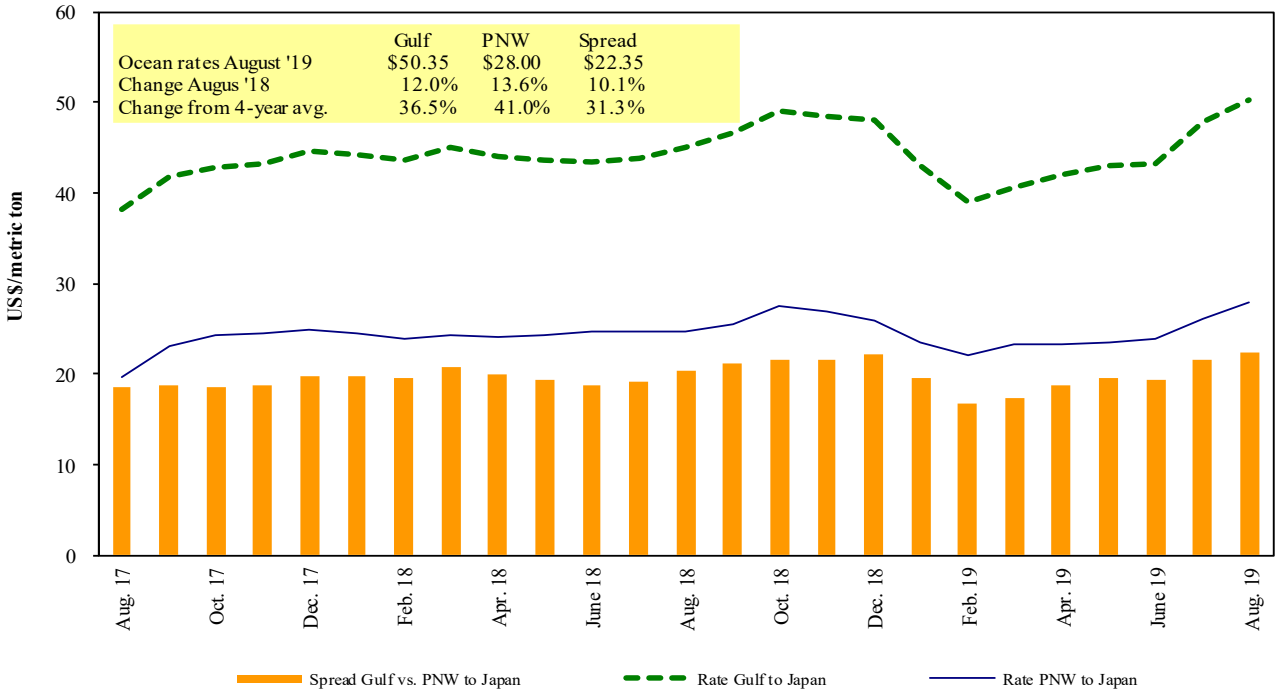
U.S. Gulf Vessel Loading Activity



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 08/31/2019

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	Pt Sudan	Sorghum	Sep 20/30	24,960	58.15*
U.S. Gulf	Djibouti	Wheat	Aug 19/29	20,000	85.66*
U.S. Gulf	Somaliland	Sorghum	Sep 20/30	32,240	61.75*
PNW	Yemen	Wheat	Sep 5/15	35,380	59.59*
PNW	Yemen	Wheat	Sep 20/30	35,000	62.19*
Brazil	China	Heavy Grain	Jun 10/20	65,000	33.00
Brazil	China	Heavy Grain	Apr 20/May 5	63,000	33.00

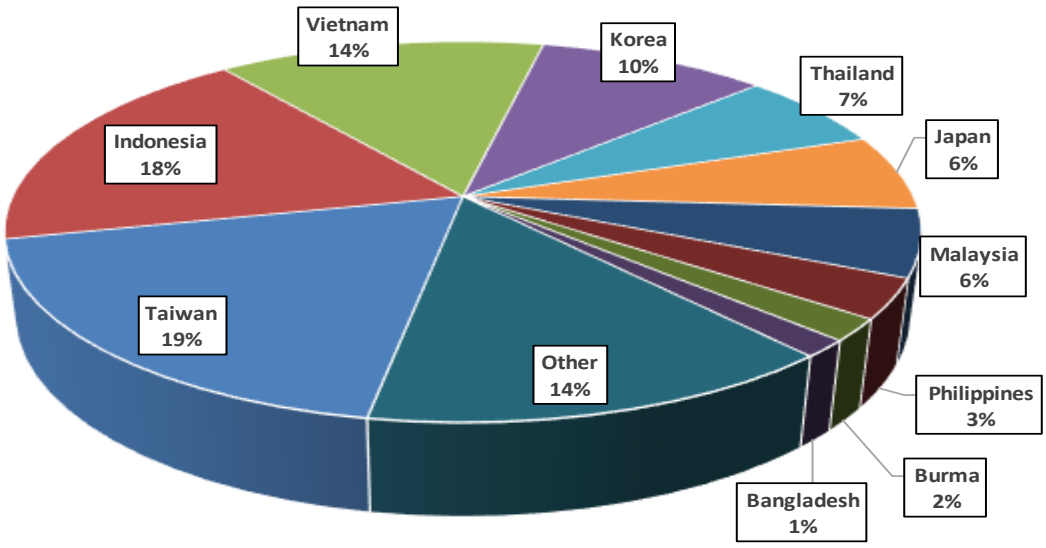
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option

*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)

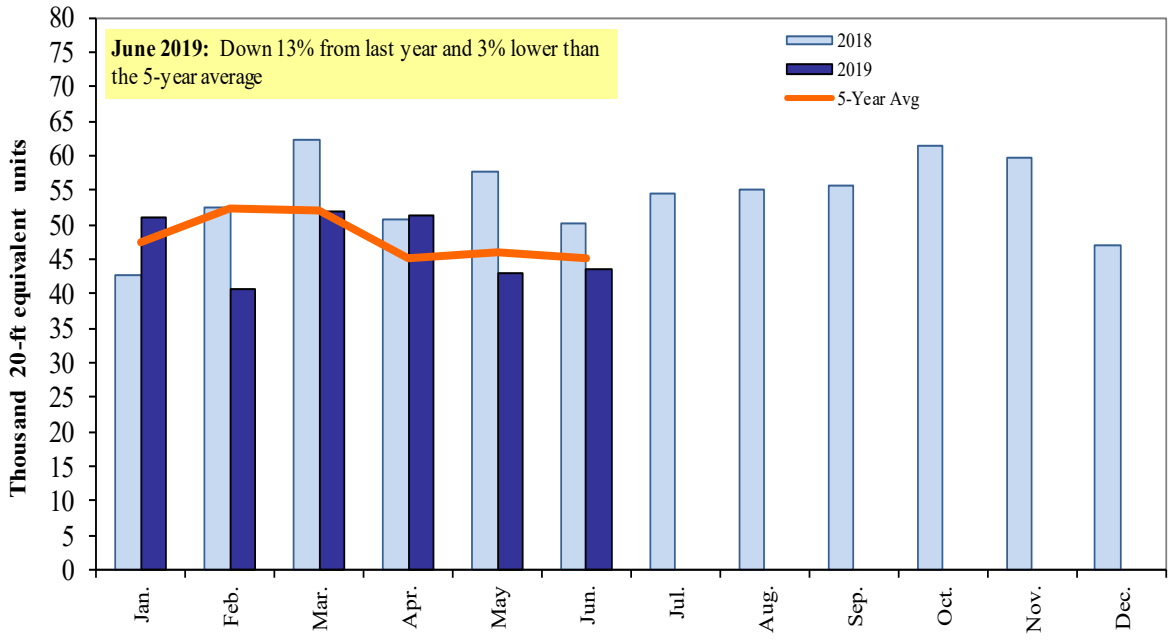
In 2017, containers were used to transport 7 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2017 went to Asia, of which 10 percent were moved in containers. Approximately 93 percent of U.S. waterborne containerized grain exports were destined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

Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, Jan-Jun 2019



Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of 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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