USDA United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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Contents

The next release is November 21, 2019

WEEKLY HIGHLIGHTS

Waterways Symposium Highlights the Importance of Reliable Infrastructure

From November 6 to 8, Waterways Conference, Inc. (WCI) held its annual symposium in Pittsburgh, PA, on the theme of "Structuring a Plan for Waterways' Infrastructure Investment." A key takeaway from the program was the importance of reliable waterway infrastructure to keeping waterborne transportation economically viable for shippers. WCI is a professional association representing the interests of users of inland waterways, including representatives from grain boards in States using the waterways. An AMS Transportation Services Division staff member presented the current statistics on grain traffic on inland waterways and highlights from the AMS-sponsored report, "The Importance of Inland Waterways to Agriculture." The report was officially released in August during a joint appearance by USDA Secretary Sonny Perdue and Assistant Secretary for the Army for Civil Works R.D. James. Other panelists represented the chemical and construction industries. The presentation slides can be found at https://waterwayscouncil.org/get-involved/past-symposium-archives/profile/2019-symposium.

Total Inspections Up for the Week but Still Below Recent Years

For the week ending November 7, total inspections of grain (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.51 million metric tons (mmt). Total inspections were up 17 percent from the previous week but down 15 percent from last year and down 26 percent from the 3-year average. Over the past 4 weeks, total grain inspections were 90 percent of last year and 73 percent of the prior 3-year average. Specifically, over the past 4 weeks, wheat inspections were strong, 33 percent above last year and 49 percent above the 3-year average, but corn and soybean inspections were low, down 41 percent and 33 percent, respectively, from the 3-year average. From the previous week, Pacific Northwest inspections were up 10 percent and Mississippi Gulf inspections were up 27 percent.

Short Supply of Propane in the Midwest

This year's wet grain harvest conditions in the Midwest have put pressure on propane supplies in the region. Propane remains the first choice of fuel in the Midwest for drying grain. According to the Department of Energy's Energy Information Administration, propane stocks in the Midwest typically peak between late September and mid-October, then start slowly falling through November and December. As of November 1, stocks had fallen 6 percent since the end of September and were approximately 2 million barrels lower than the same week last year. Reuters recently reported, "The supply crunch prompted the governors of Iowa, [Indiana], Minnesota, North Dakota, South Dakota and Wisconsin in recent days to sign executive orders temporarily lifting regulations restricting what hours commercial drivers can transport propane, gasoline and diesel fuel to retail suppliers, to try to get the fuel to farmers and farm cooperatives as fast as possible."

Snapshots by Sector

Export Sales

For the week ending October 31, **unshipped balances** of wheat, corn, and soybeans totaled 23.7 mmt. This represented a 22-percent decrease in outstanding sales, compared to the same time last year. Net **corn export sales** reached .488 mmt, down 11 percent from the past week. Net **soybean export sales** were 1.81 mmt, up 91 percent from the previous week. Net weekly **wheat export sales** reached .361 mmt, down 27 percent from the from the previous week.

Rail

U.S. Class I railroads originated 21,798 **grain carloads** during the week ending November 2. This was a 3-percent increase from the previous week, 7 percent more than last year, and 10 percent less than the 3-year average.

Average November shuttle **secondary railcar** bids/offers (per car) were $69 above tariff for the week ending November 7. This was $144 less than last week and $319 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending November 9, **barge grain movements** totaled 745,366 tons. This was a 13-percent increase from the previous week and 23 percent less than the same period last year.

For the week ending November 9, 468 grain barges **moved down river**—52 more barges than the previous week. There were 780 grain barges **unloaded in New Orleans**, 26 percent more than the previous week.

Ocean

For the week ending November 7, 39 **oceangoing grain vessels** were loaded in the Gulf—11 percent more than the same period last year. Within the next 10 days (starting November 8), 38 vessels were expected to be loaded—28 percent fewer than the same period last year.

As of November 7, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $48.50. This was 2 percent less than the previous week. The rate from PNW to Japan was $26.25 per mt, 3 percent less than the previous week.

Fuel

For the week ending November 11, the U.S. average **diesel fuel price** increased 1.1 cents from the previous week to $3.073 per gallon, 24.4 cents below the same week last year.

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Feature Article/Calendar

Third-Quarter Soybean Transportation and Landed Costs in the United States and Brazil

Compared to the previous quarter, transportation and landed costs of U.S. soybeans to Europe and China were mixed, but Brazil's costs to the same destinations increased during third quarter 2019 (tables 1 and 2). Transportation costs from Minneapolis, MN and Davenport, IA to both Europe and China declined as a result of improved navigation conditions on the Mississippi River system. After being forced to close earlier in the year because of persistent flooding and navigation disruptions, the upper portion of the Mississippi River was reopened for barge transportation (see August 15, 2019 *Grain Transportation Report* (*GTR*)).

To account for the river closures, transportation cost comparisons were modified to include a rail-to-barge segment. In this segment, soybeans were transported by rail from Minneapolis, MN and Davenport, IA to St. Louis, MO and then transferred onto barges for shipment to New Orleans, LA. The river closures and substitutions of rail for barge raised transportation costs in the second quarter and lowered them in the third quarter when the river reopened.

Table 1-Quarterly costs of transporting soybeans from United States and Brazil to Hamburg, Germany

	2018 3rd qtr.	2019 2nd qtr.	2019 3rd qtr.	Percent change Yr. to yr.	Percent change Qtr. to qtr.	2018 3rd qtr.	2019 2nd qtr.	2019 3rd qtr.	Percent change Yr. to yr.	Percent change Qtr. to qtr.
	United States (via U.S. Gulf)									
	Minneapolis, MN --$/mt--					Davenport, IA --$/mt--				
Truck	10.54	10.98	9.18	-12.90	-16.39	10.54	10.98	9.18	-12.90	-16.39
Rail[1]		47.93			-100.00		32.11			-100.00
Barge	36.30	13.06	31.39	-13.53	140.35	29.20	13.06	28.74	-1.58	120.06
Ocean[2]	21.06	16.62	20.21	-4.04	21.60	21.06	16.62	20.21	-4.04	21.60
Total transportation	67.90	88.59	60.78	-10.49	-31.39	60.80	72.77	58.13	-4.39	-20.12
Farm value[3]	315.38	298.97	303.87	-3.65	1.64	317.83	299.09	303.75	-4.43	1.56
Landed cost[4]	383.28	387.56	364.65	-4.86	-5.91	378.63	371.86	361.88	-4.42	-2.68
Transport % of landed cost	17.72	22.86	16.67			16.06	19.57	16.06		
	Brazil									
	North MT[5] - Santos[6] --$/mt--					South GO[5] - Paranagua[6] --$/mt--				
Truck	92.79	73.96	88.37	-4.76	19.48	52.61	43.76	51.28	-2.53	17.18
Ocean[7]	24.00	21.50	27.00	12.50	25.58	25.00	21.25	27.00	8.00	27.06
Total transportation	116.79	95.46	115.37	-1.22	20.86	77.61	65.01	78.28	0.86	20.41
Farm value[8]	301.39	271.70	286.87	-4.82	5.58	302.33	281.40	286.67	-5.18	1.87
Landed cost	418.18	367.16	402.24	-3.81	9.55	379.94	346.41	364.95	-3.95	5.35
Transport % of landed cost	27.93	26.00	28.68			20.43	18.77	21.45		

[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 for the U.S. ocean rates: O'Neil Commodity Consulting.

[3]Source for the U.S. farm values: USDA/National Agrocultural Statistics Service.

[4]Landed cost is total cost plus farm value.

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

[6]Export ports.

[7]Source for Brazil's ocean rates:University of São Paulo, Brazil and USDA/Agricultural Marketing Service.

[8]Source for Brazil's farm values: Companhia Nacional de Abastecimento.

Note: qtr. = quarter; yr. = year; mt = metric ton; total may not add exactly because of rounding.

Source: Compiled by the USDA, Agricultural Marketing Service.

At the same time, U.S. truck rates also fell, and bulk grain ocean freight rates rose, because of higher global demand for bulk items such as coal and iron ore (see October 31, 2019 *GTR*). The drop in truck rates and costs associated with the barge-for-rail substitution along the entire route to New Orleans exceeded the increase in the ocean freight rates, and the net effect pushed total transportation costs down. However, for shipments from Fargo, ND and Sioux Falls, SD through PNW, the increase in the ocean freight rates outweighed the decrease in the truck rates, causing total transportation costs to rise. In Brazil, both truck and ocean freight rates increased during the quarter, pushing up total transportation costs. Despite the increase in the U.S. soybean farm value, the lower transportation costs reduced landed costs from Minneapolis, MN and Davenport, IA to Europe and China, while landed costs from

Fargo, ND and Sioux Falls, SD to China rose. From the second to the third quarter, both Brazil's soybean farm values and landed costs to Europe and China increased.

Table 2-Quarterly costs of transporting soybeans from United States and Brazil to Shanghai, China

	2018 3rd qtr.	2019 2nd qtr.	2019 3rd qtr.	Percent change Yr. to yr.	Percent change Qtr. to qtr.	2018 3rd qtr.	2019 2nd qtr.	2019 3rd qtr.	Percent change Yr. to yr.	Percent change Qtr. to qtr.
	United States (via U.S. Gulf)									
	Minneapolis, MN					**Davenport, IA**				
	--$/mt--					--$/mt--				
Truck	10.54	10.98	9.18	-12.90	-16.39	10.54	10.98	9.18	-12.90	-16.39
Rail[1]		47.93			-100.00		32.11			-100.00
Barge	36.30	13.06	31.39	-13.53	140.35	29.20	13.06	28.74	-1.58	120.06
Ocean[2]	44.05	42.20	49.35	12.03	16.94	44.05	42.20	49.35	12.03	16.94
Total transportation	90.89	114.17	89.92	-1.07	-21.24	83.79	98.35	87.27	4.15	-11.27
Farm value[3]	315.58	298.97	303.87	-3.71	1.64	317.83	299.09	303.75	-4.43	1.56
Landed cost[4]	406.47	413.14	393.79	-3.12	-4.68	401.62	397.44	391.02	-2.64	-1.62
Transport % of landed cost	22.36	27.63	22.83			20.86	24.75	22.32		
	Via PNW									
	Fargo, ND					**Sioux Falls, SD**				
Truck	10.54	10.98	9.18	-12.90	-16.39	10.54	10.98	9.18	-12.90	-16.39
Rail	55.11	56.11	56.11	1.81	0.00	56.11	57.10	57.10	1.76	0.00
Ocean	24.26	22.93	27.28	12.45	18.97	24.26	22.93	27.28	12.45	18.97
Total transportation	89.91	90.02	92.57	2.96	2.83	90.91	91.01	93.56	2.91	2.80
Farm value	305.95	277.90	281.33	-8.05	1.23	306.20	284.15	288.44	-5.80	1.51
Landed cost	395.86	367.92	373.90	-5.55	1.63	397.11	375.16	382.00	-3.80	1.82
Transport % of landed cost	22.71	24.47	24.76			22.89	24.26	24.49		
	Brazil									
	North MT[5] - Santos[6]					**South GO[5] - Paranagua[6]**				
	--$/mt--					--$/mt--				
Truck	92.79	73.96	88.37	-4.76	19.48	52.61	43.76	51.28	-2.53	17.18
Ocean[7]	27.75	30.92	33.25	19.82	7.54	28.75	31.42	34.75	20.87	10.60
Total transportation	120.54	104.88	121.62	0.90	15.96	81.36	75.18	86.03	5.74	14.43
Farm Value[8]	301.39	271.70	286.87	-4.82	5.58	302.33	281.40	286.67	-5.18	1.87
Landed Cost	421.93	376.58	408.49	-3.19	8.47	383.69	356.58	372.70	-2.86	4.52
Transport % of landed cost	28.57	27.85	29.77			21.20	21.08	23.08		

[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 for the U.S. Ocean freight rates: O'Neil Commodity Consulting.

[3]Source for the U.S farm values: USDA, National Agricultural Statistivs Service.

[4]Landed cost is transportation cost plus farm value.

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

[6]Export ports.

[7]Source for Brazil's ocean freight rates: University of São Paulo, Brazil and USDA, Agricultural Marketing Service.

[8]Source for Brazil's farm values: Companhia Nacional de Abastecimento.

Note: qtr. = quarter; yr. = year; mt = metric ton; total may not add exactly because of rounding.

Source: Compiled by the USDA, Agricultural Marketing Service.

From the United States, landed costs to Hamburg, Germany were about $362-$365/metric ton (mt) (table 1) and to Shanghai, China were $374-$394/mt (table 2). From Brazil, landed costs to Hamburg, Germany were $365- $402/mt (table 1) and to Shanghai, China were $373-$408/mt (table 2). Because of lower transportation costs and higher farm values, U.S. transportation's share of landed costs fell for shipments from Minneapolis, MN and Davenport, IA. However, that share remained relatively stable for shipments from Fargo, ND and Sioux Falls, SD. In Brazil, transportation's share of landed costs increased. U.S. transportation's share of landed costs to Hamburg, Germany were 16-17 percent (table 1) and to Shanghai, China were 22 to 25 percent (table 2). Brazil's transportation share of landed costs to Hamburg, Germany were 21 to 29 percent (table 1), and to Shanghai, China were 23 to 30 percent (table 2).

According to USDA's grain inspection data, China imported 5.64 million metric tons (mmt) of U.S. soybeans during third quarter 2019 versus 3.54 mmt in the previous quarter and 0.38 mmt during the same period in 2018.

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Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit train	Shuttle		Gulf	Pacific
11/13/19	206	n/a	228	224	217	186
11/06/19	206	n/a	235	191	221	191

[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: USDA, Agricultural Marketing Service.

Table 2

Market Update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	11/8/2019	11/1/2019
Corn	IL–Gulf	-0.51	-0.56
Corn	NE–Gulf	-0.73	-0.77
Soybean	IA–Gulf	-1.01	-1.18
HRW	KS–Gulf	-2.53	-2.48
HRS	ND–Portland	-2.71	-2.73

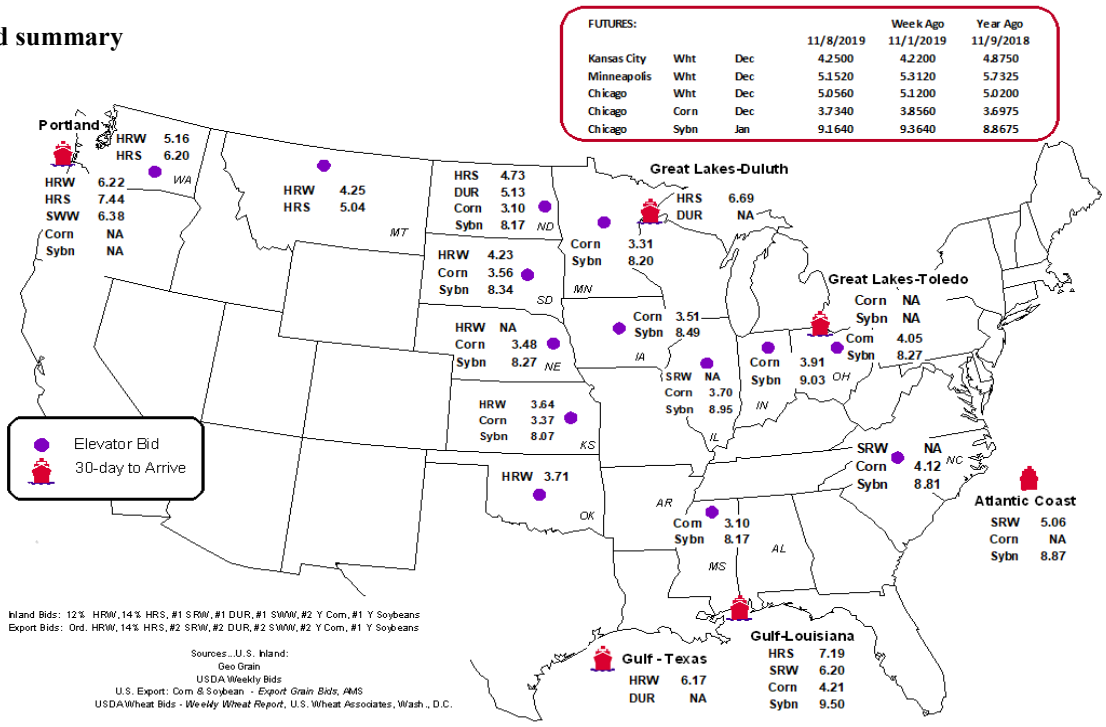
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

Source: USDA, Agricultural Marketing Service.

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

Figure 1

Grain bid summary



Rail Transportation

Table 3

Rail deliveries to port (carloads)[1]

For the week ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-border Mexico[3]
11/06/2019[p]	443	159	5,873	18	6,493	11/2/2019	2,708
10/30/2019[r]	550	462	5,618	552	7,182	10/26/2019	2,244
2019 YTD[r]	37,734	47,331	217,975	15,167	318,207	2019 YTD	107,861
2018 YTD[r]	20,972	42,084	276,140	18,519	357,715	2018 YTD	109,313
2019 YTD as % of 2018 YTD	180	112	79	82	89	% change YTD	99
Last 4 weeks as % of 2018[2]	59	124	106	51	97	Last 4wks. % 2018	83
Last 4 weeks as % of 4-year avg.[2]	28	61	73	29	61	Last 4wks. % 4 yr.	106
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 Kansas City Southern de Mexico (KCSM) and Grupo Mexico.

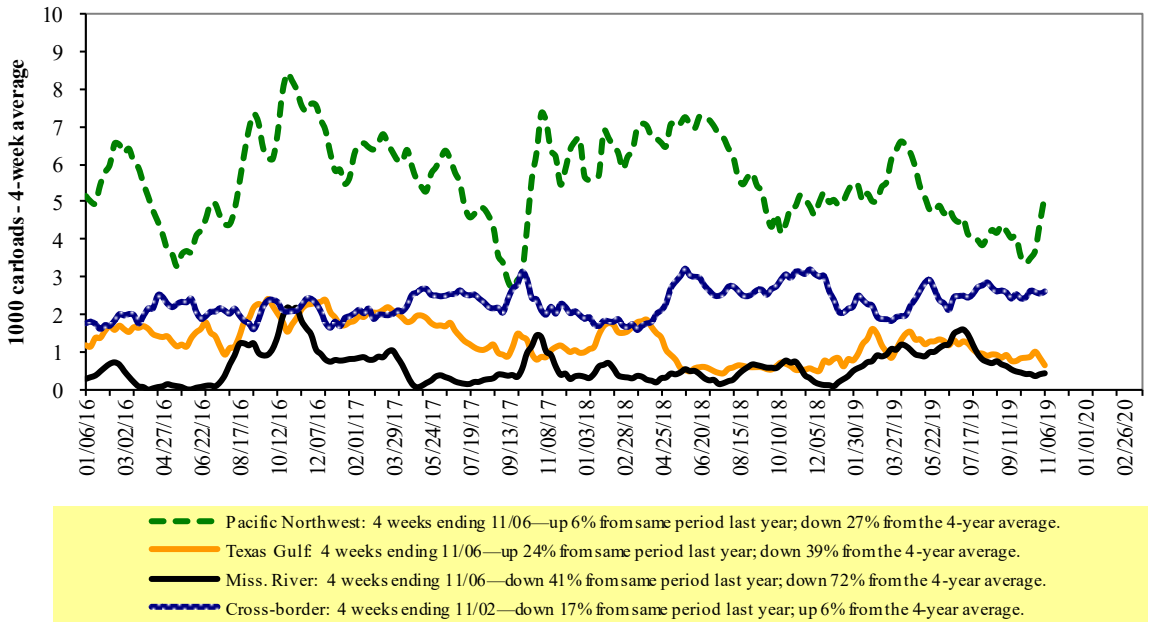
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

Source: USDA, Agricultural Marketing Service.

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: USDA, Agricultural Marketing Service.

Table 4

Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending:	East		West			U.S. total	Canada	
11/2/2019	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,647	2,315	11,473	1,454	4,909	21,798	4,552	5,644
This week last year	2,441	2,118	10,161	611	5,061	20,392	4,667	5,548
2019 YTD	79,495	117,574	478,199	49,876	222,919	948,063	179,238	196,706
2018 YTD	85,401	112,005	540,863	41,188	228,914	1,008,371	176,526	206,921
2019 YTD as % of 2018 YTD	93	105	88	121	97	94	102	95
Last 4 weeks as % of 2018*	78	88	95	124	106	96	95	98
Last 4 weeks as % of 3-yr. avg.**	72	67	96	109	87	88	90	96
Total 2018	98,978	133,037	635,458	48,638	267,713	1,183,824	211,796	244,697

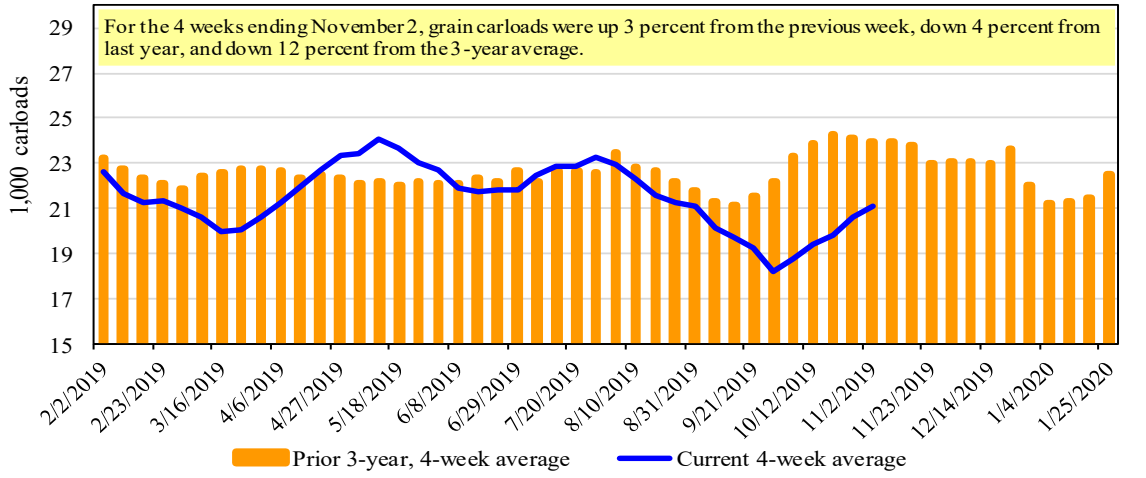
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

Source: Association of American Railroads.

Figure 3

Total weekly U.S. Class I railroad grain car loads



Source: Association of American Railroads.

Table 5

Railcar auction offerings[1] ($/car)[2]

For the week ending:		Delivery period							
11/7/2019		Nov-19	Nov-18	Dec-19	Dec-18	Jan-20	Jan-19	Feb-20	Feb-19
BNSF[3]	COT grain units	0	no bid	0	no bid	2	no bid	0	no bid
	COT grain single-car	0	0	0	0	2	0	2	0
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. n/a = not available.

[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.

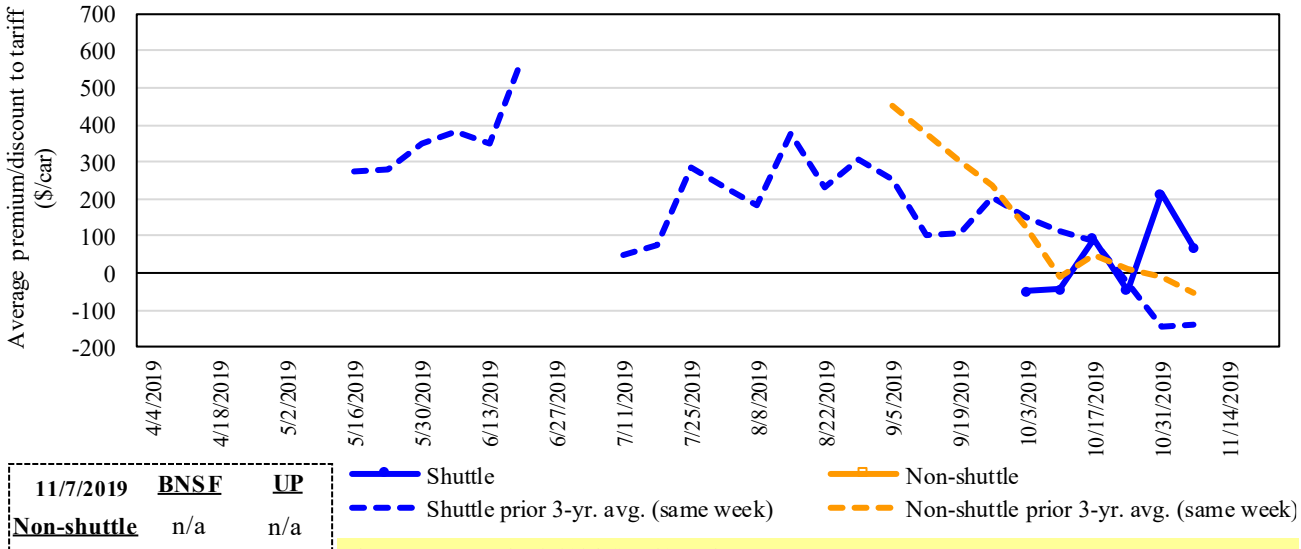
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

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 November 2019, secondary market

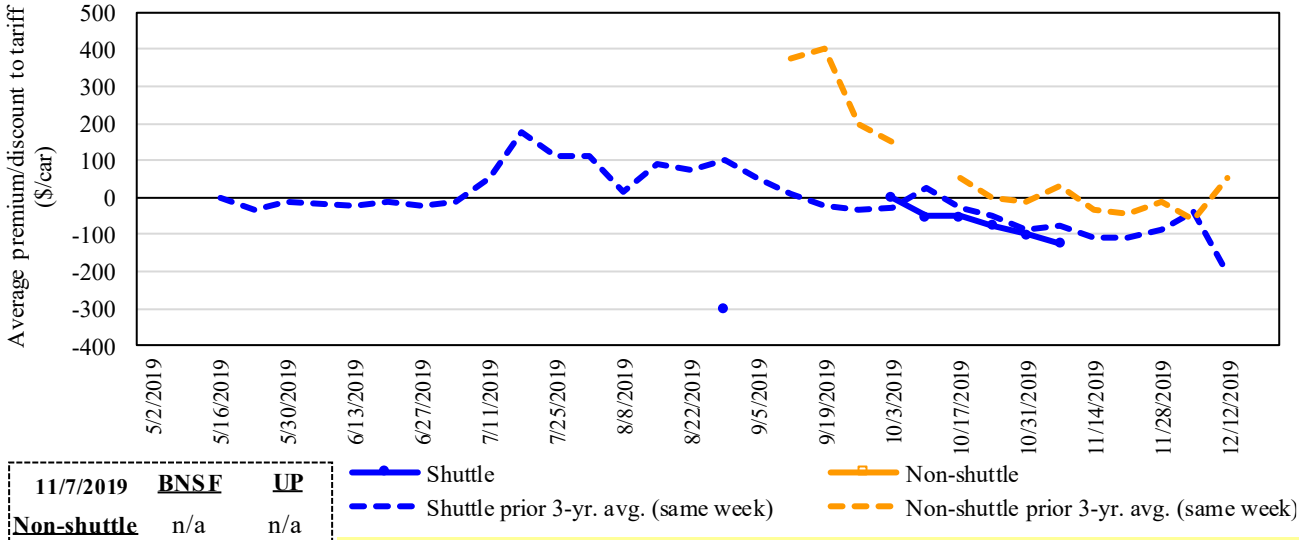


11/7/2019	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$288	-$150

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $144 this week and are $144 below the peak.

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year.
Source: USDA, Agricultural Marketing Service.

Figure 5
Bids/offers for railcars to be delivered in December 2019, secondary market



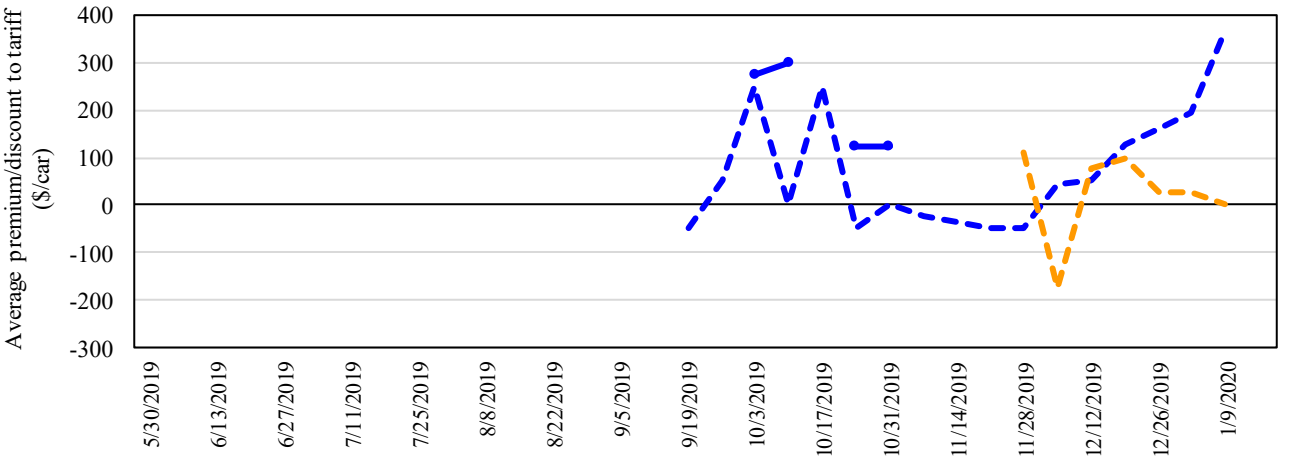
11/7/2019	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	n/a	-$125

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $25 this week and are $125 below the peak.

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year.
Source: USDA, Agricultural Marketing Service.

Figure 6

Bids/offers for railcars to be delivered in January 2020, secondary market



11/7/2019	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.

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year.
Source: USDA, Agricultural Marketing Service.

Table 6

Weekly secondary railcar market ($/car)[1]

	For the week ending: 11/7/2019	Delivery period					
		Nov-19	Dec-19	Jan-20	Feb-20	Mar-20	Apr-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**	**288**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	75	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	500	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**(150)**	**(125)**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	(25)	n/a	n/a	n/a	n/a
	Change from same week 2018	138	(25)	n/a	n/a	n/a	n/a

[1]Average premium/discount to tariff, $/car-last week.

Note: Bids listed are market indicators only and are not guaranteed prices. n/a = not available; GF = guaranteed freight; Pool = guaranteed pool.

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

Source: USDA, Agricultural Marketing Service.

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]

November 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	-1
	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	$3,900	$191	$40.63	$1.03	-4
	Toledo, OH	Raleigh, NC	$6,816	$0	$67.69	$1.72	4
	Des Moines, IA	Davenport, IA	$2,415	$40	$24.38	$0.62	6
	Indianapolis, IN	Atlanta, GA	$5,818	$0	$57.78	$1.47	3
	Indianapolis, IN	Knoxville, TN	$4,874	$0	$48.40	$1.23	4
	Des Moines, IA	Little Rock, AR	$3,800	$119	$38.92	$0.99	-2
	Des Moines, IA	Los Angeles, CA	$5,680	$346	$59.84	$1.52	-2
Soybeans	Minneapolis, MN	New Orleans, LA	$3,631	$179	$37.83	$1.03	-13
	Toledo, OH	Huntsville, AL	$5,630	$0	$55.91	$1.52	3
	Indianapolis, IN	Raleigh, NC	$6,932	$0	$68.84	$1.87	3
	Indianapolis, IN	Huntsville, AL	$5,107	$0	$50.71	$1.38	3
	Champaign-Urbana, IL	New Orleans, LA	$4,645	$191	$48.03	$1.31	-3
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	$7,074	$0	$70.25	$1.91	20
	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	0
Corn	Minneapolis, MN	Portland, OR	$5,180	$0	$51.44	$1.31	0
	Sioux Falls, SD	Tacoma, WA	$5,140	$0	$51.04	$1.30	0
	Champaign-Urbana, IL	New Orleans, LA	$3,820	$191	$39.83	$1.01	-1
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	0
	Des Moines, IA	Amarillo, TX	$4,220	$150	$43.39	$1.10	3
	Minneapolis, MN	Tacoma, WA	$5,180	$0	$51.44	$1.31	0
	Council Bluffs, IA	Stockton, CA	$5,000	$0	$49.65	$1.26	0
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,850	$0	$58.09	$1.58	2
	Minneapolis, MN	Portland, OR	$5,900	$0	$58.59	$1.59	2
	Fargo, ND	Tacoma, WA	$5,750	$0	$57.10	$1.55	2
	Council Bluffs, IA	New Orleans, LA	$4,875	$220	$50.60	$1.38	1
	Toledo, OH	Huntsville, AL	$4,805	$0	$47.72	$1.30	4
	Grand Island, NE	Portland, OR	$5,860	$311	$61.28	$1.67	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 pounds per bushel (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 (Y/Y) calculated using tariff rate plus fuel surcharge.

Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 8

Tariff rail rates for U.S. bulk grain shipments to Mexico

Date: November 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	4
	TX	Salinas Victoria, NL	$4,329	$80	$45.05	$1.22	-1
Corn	IA	Guadalajara, JA	$8,902	$509	$96.15	$2.44	6
	SD	Celaya, GJ	$8,140	$0	$83.17	$2.11	3
	NE	Queretaro, QA	$8,278	$271	$87.35	$2.22	0
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,643	$264	$80.79	$2.05	0
	SD	Torreon, CU	$7,690	$0	$78.57	$1.99	3
Soybeans	MO	Bojay (Tula), HG	$8,547	$475	$92.18	$2.51	4
	NE	Guadalajara, JA	$9,172	$497	$98.78	$2.69	5
	IA	El Castillo, JA	$9,490	$0	$96.97	$2.64	4
	KS	Torreon, CU	$7,964	$344	$84.88	$2.31	4
Sorghum	NE	Celaya, GJ	$7,772	$450	$84.01	$2.13	4
	KS	Queretaro, QA	$8,108	$165	$84.53	$2.15	1
	NE	Salinas Victoria, NL	$6,713	$133	$69.94	$1.77	1
	NE	Torreon, CU	$7,157	$319	$76.39	$1.94	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.

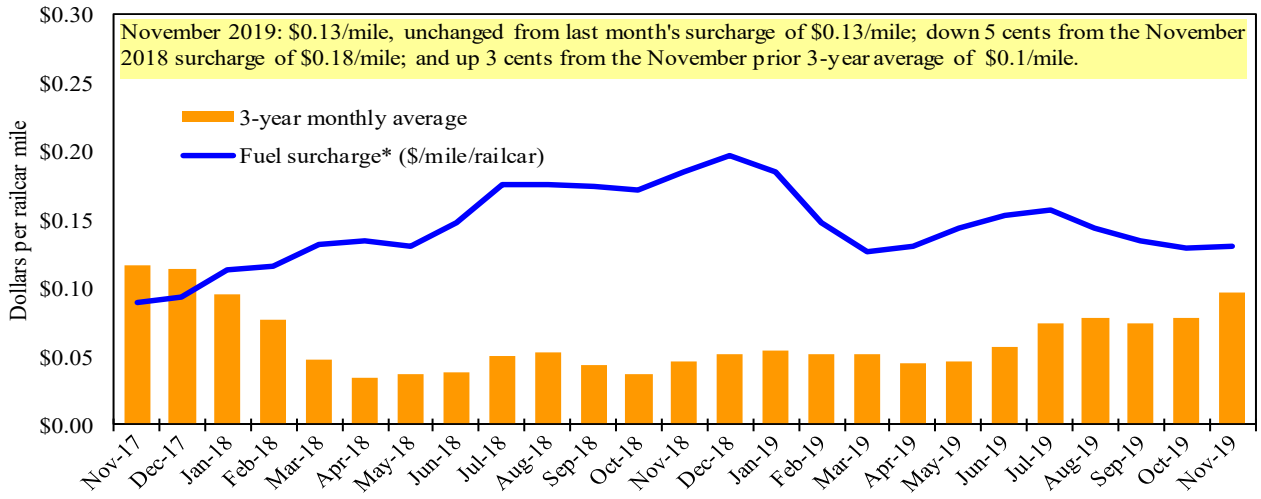
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[4]Percentage change calculated using tariff rate plus fuel surchage; Y/Y = year to year.

Sources: BNSF Railway, Union Pacific Railroad, Kansas City Southern.

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.

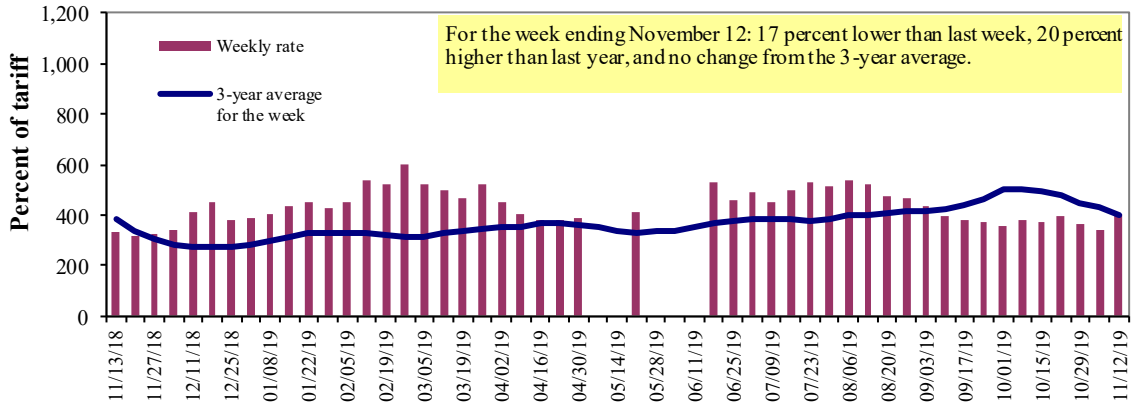
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

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

Sources: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific, Union Pacific Railroad, Kansas City Southern, Norfolk Southern Corp.

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: USDA, Agricultural Marketing Service.

Table 9
Weekly barge freight rates: Southbound only

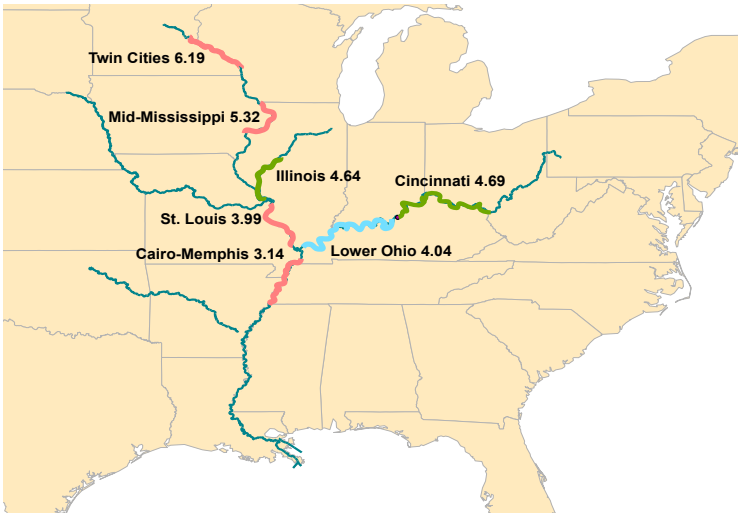
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	11/12/2019	410	414	403	271	266	266	241
	11/5/2019	416	348	344	246	253	253	225
$/ton	11/12/2019	25.38	22.02	18.70	10.81	12.48	10.75	7.57
	11/5/2019	25.75	18.51	15.96	9.82	11.87	10.22	7.07
Current week % change from the same week:								
	Last year	2	17	20	2	-7	-8	1
	3-year avg. [2]	-11	0	0	-13	-31	-31	-11
Rate[1]	December	-	-	378	269	263	263	239
	February	-	-	383	263	261	261	235

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds; "-" not available due to closure
Source: USDA, Agricultural Marketing Service.

Figure 9
Benchmark tariff rates

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

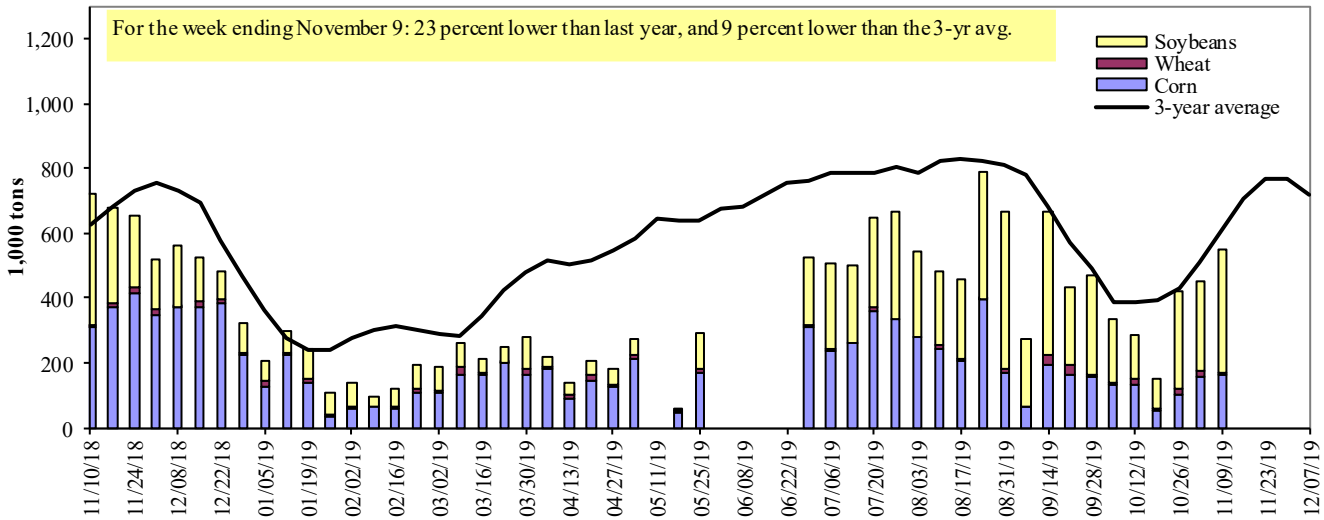
Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map.



Map Credit: USDA, Agricultural Marketing Service

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 11/09/2019	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	47	2	241	0	290
Winfield, MO (L25)	93	2	329	0	424
Alton, IL (L26)	145	2	397	0	544
Granite City, IL (L27)	165	2	386	0	552
Illinois River (LAGRANGE)	44	0	33	0	77
Ohio River (OLMSTED)	64	4	100	2	169
Arkansas River (L1)	0	3	21	0	24
Weekly total - 2019	228	8	508	2	745
Weekly total - 2018	398	25	547	4	973
2019 YTD[1]	10,581	1,440	11,337	138	23,495
2018 YTD[1]	20,374	1,491	10,747	101	32,713
2019 as % of 2018 YTD	52	97	105	136	72
Last 4 weeks as % of 2018[2]	62	133	129	29	95
Total 2018	23,349	1,674	12,819	133	37,975

[1] Weekly total, YTD (year-to-date), and calendar year total include MS/27, OH/OLMSTED, and AR/1; Other refers to oats, barley, sorghum, and rye. L (as in "L15") refers to a lock or lock and dam facility.

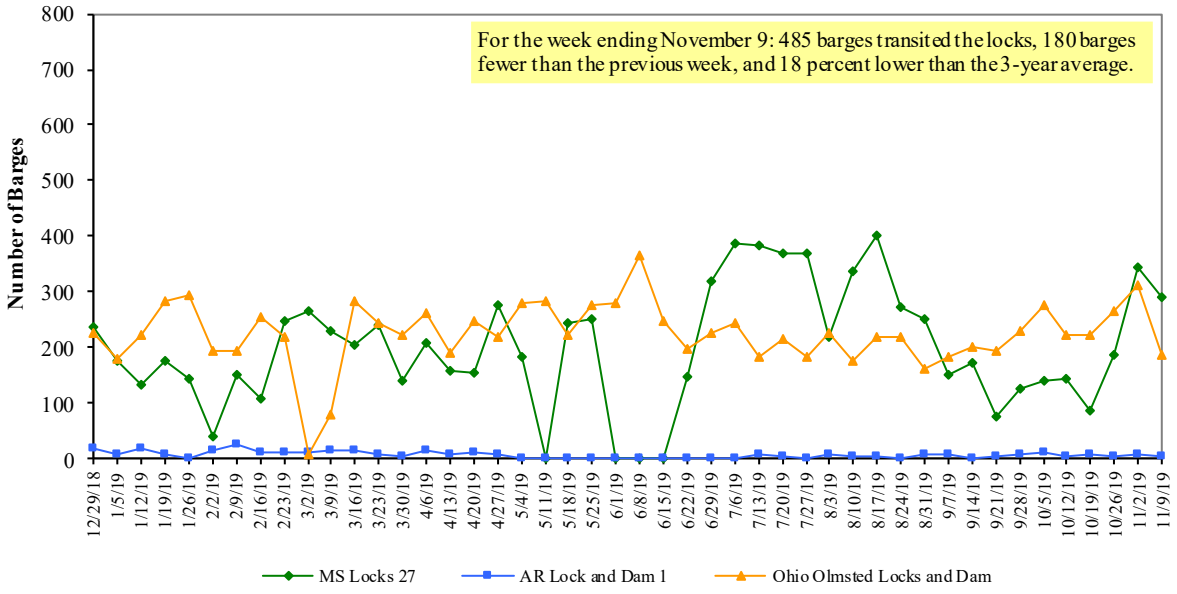
[2] As a percent of same period in 2018.

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

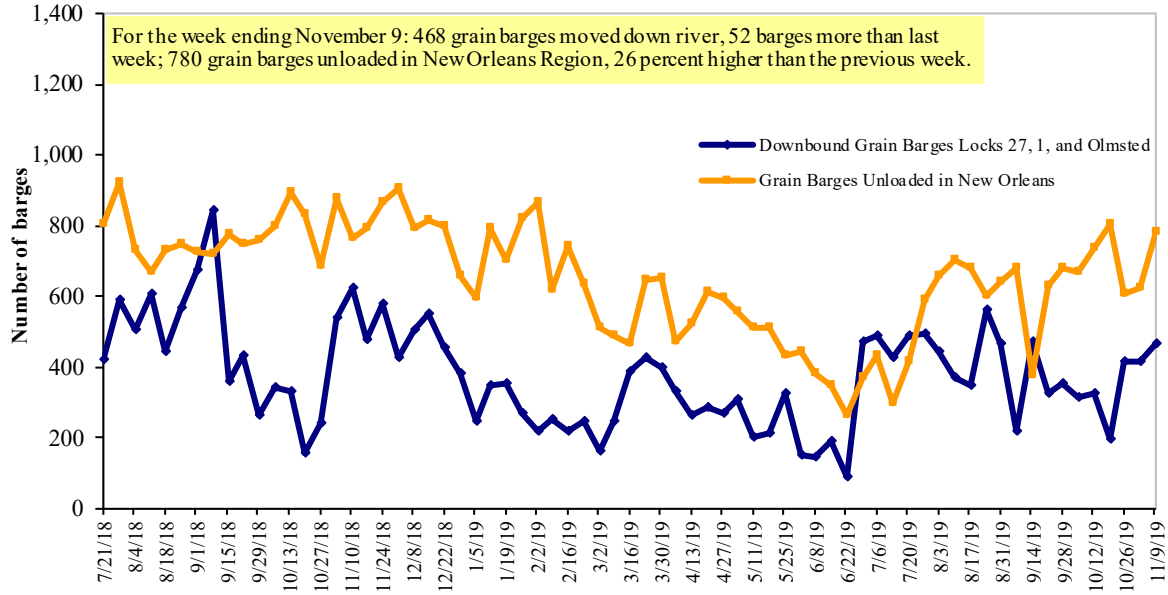
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 USDA, Agricultural Market Service.

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 11/11/2019 (U.S. $/gallon)

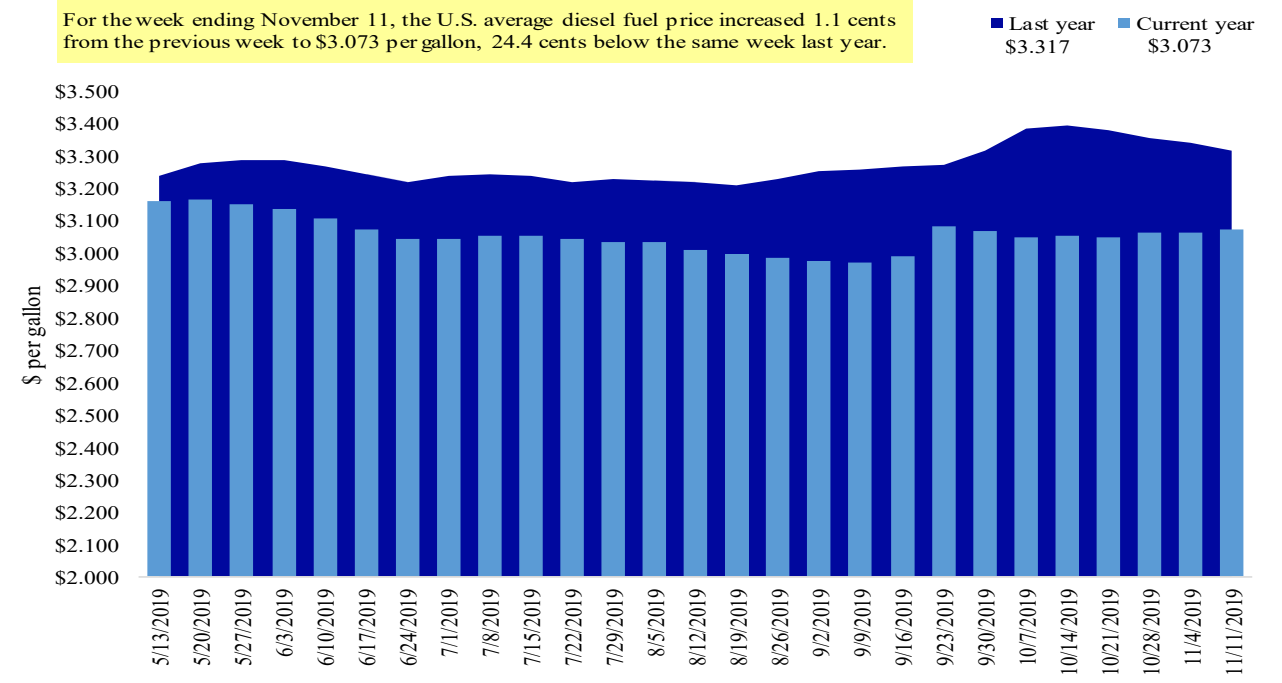
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.050	0.009	-0.264
	New England	3.042	0.008	-0.314
	Central Atlantic	3.245	0.001	-0.238
	Lower Atlantic	2.919	0.014	-0.268
II	Midwest	2.972	0.017	-0.290
III	Gulf Coast	2.795	0.000	-0.290
IV	Rocky Mountain	3.203	0.037	-0.175
V	West Coast	3.758	0.012	-0.049
	West Coast less California	3.435	0.022	-0.079
	California	4.014	0.003	-0.026
Total	U.S.	3.073	0.011	-0.244

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

Source: U.S. Department of Energy, Energy Information Administration.

Figure 13

Weekly diesel fuel prices, U.S. average



Source: U.S. Department of Energy, Energy Information Administration, Retail On-Highway Diesel Prices.

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]									
10/31/2019	1,126	580	1,233	921	313	4,173	7,954	11,565	23,691
This week year ago	1,461	646	1,826	1,087	146	5,166	11,933	13,216	30,314
Cumulative exports-marketing year[2]									
2019/20 YTD	4,351	1,253	2,879	1,925	358	10,766	3,939	9,514	24,219
2018/19 YTD	2,493	1,036	2,572	2,236	243	8,580	10,601	8,330	27,511
YTD 2019/20 as % of 2018/19	175	121	112	86	147	125	37	114	88
Last 4 wks as % of same period 2018/19	83	91	68	87	168	82	65	91	79
2018/19 Total	8,591	3,204	6,776	5,164	479	24,214	48,924	46,189	119,327
2017/18 Total	9,150	2,343	5,689	4,854	384	22,419	57,209	56,214	135,842

[1] Current unshipped (outstanding) export sales to date

[2] Shipped export sales to date; new marketing year now in effect for wheat, corn, and soybeans.

Note: Marketing Year: wheat = 6/01-5/31, corn and soybeans = 9/01-8/31. YTD = year-to-date; wks = weeks; HRW= hard red winter; srw= soft red winter; HRS= hard red spring; SWW= soft white wheat; DUR= durum.

Source: USDA, Foreign Agricultural Service.

Table 13

Top 5 importers[1] of U.S. corn

For the week ending 10/31/2019	Total commitments[2] 2019/20 current MY	Total commitments[2] 2018/19 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2016-18
		- 1,000 mt -		
Mexico	6,296	7,361	(14)	14,659
Japan	1,612	3,751	(57)	11,955
Korea	73	1,941	(96)	4,977
Colombia	578	1,124	(49)	4,692
Peru	0	817	(100)	2,808
Top 5 Importers	**8,559**	**14,994**	**(43)**	**39,091**
Total U.S. corn export sales	**11,893**	**22,534**	**(47)**	**54,024**
% of projected exports	25%	43%		
Change from prior week[2]	**488**	**701**		
Top 5 importers' share of U.S. corn export sales	72%	67%		72%
USDA forecast, October 2019	**48,346**	**52,545**	**(8)**	
Corn use for ethanol USDA forecast, October 2019	**137,160**	**136,551**	**0**	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2018/19; marketing year (MY) = Sep 1 - Aug 31.

[2]Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. 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 (carryover plus accumulated export; yr. = year; avg. = average.

Note: (n) indicates negative number; mt = metric ton

Source: USDA, Foreign Agriculltural Service.

Table 14

Top 5 importers[1] of U.S. soybeans

For the week ending 10/31/2019	Total commitments[2] 2019/20 current MY	2018/19 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2016-18
		- 1,000 mt -		- 1,000 mt -
China	7,146	841	750	25,733
Mexico	2,605	3,295	(21)	4,271
Indonesia	536	710	(24)	2,386
Japan	861	801	8	2,243
Egypt	805	707	14	1,983
Top 5 importers	**11,953**	**6,353**	**88**	**36,616**
Total U.S. soybean export sales	**21,079**	**21,546**	**(2)**	**53,746**
% of projected exports	44%	45%		
change from prior week[2]	**1,807**	**196**		
Top 5 importers' share of U.S. soybean export sales	57%	29%		**68%**
USDA forecast, October 2019	**48,365**	**47,629**	**102**	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2018/19 ; Marketing year (MY) = Sep 1- Aug 31.

[2]Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include reivisions from previous eweek's outstanding sales and/or accumulated sales.

[3]FAS Marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average.

Note: (n) indicates negative number; mt = metric ton

Source: USDA, Foreign Agriculltural Service.

Table 15

Top 10 importers[1] of all U.S. wheat

For the week ending 10/31/2019	Total commitments[2] 2019/20 current MY	2018/19 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2016-18
		- 1,000 mt -		- 1,000 mt -
Philippines	1,791	2,130	(16)	3,047
Mexico	2,256	1,588	42	3,034
Japan	1,546	1,709	(9)	2,695
Nigeria	918	628	46	1,564
Indonesia	357	335	7	1,381
Korea	865	932	(7)	1,355
Taiwan	766	605	27	1,164
Egypt	101	100	1	821
Thailand	463	538	(14)	747
Iraq	262	362	(27)	574
Top 10 importers	**9,325**	**8,926**	4	**16,382**
Total U.S. wheat export sales	**14,939**	**13,746**	**9**	**24,388**
% of projected exports	58%	54%		
change from prior week[2]	**361**	**661**		
Top 10 importers' share of U.S. wheat export sales	62%	65%		67%
USDA forecast, October 2019	**25,886**	**25,504**	**1**	

[1] Based on USDA, Foreign Agricultural Service(FAS) marketing year ranking reports for 2018/19; Marketing year (MY) = Jun 1 - May 31.

[2] Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The 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 (carryover plus accumulated export); yr. = year; avg. = average. .

(n) indicates negative number; mt = metric ton.

Source: USDA, Foreign Agriculltural Service.

Table 16

Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	For the week ending 11/07/19	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	328	189	173	12,134	11,206	108	139	185	13,315
Corn	0	0	n/a	6,922	17,959	39	0	0	20,024
Soybeans	428	498	86	9,315	7,391	126	228	64	7,719
Total	**757**	**687**	**110**	**28,371**	**36,556**	**78**	**105**	**79**	**41,058**
Mississippi Gulf									
Wheat	83	12	718	4,090	3,425	119	92	94	3,896
Corn	361	119	303	18,540	30,125	62	54	64	33,735
Soybeans	810	861	94	24,887	22,991	108	106	74	28,124
Total	**1,255**	**992**	**127**	**47,517**	**56,540**	**84**	**86**	**72**	**65,755**
Texas Gulf									
Wheat	91	51	180	5,659	2,643	214	132	122	3,198
Corn	0	0	n/a	579	702	83	5	5	730
Soybeans	0	0	n/a	2	69	2	n/a	0	69
Total	**91**	**51**	**180**	**6,240**	**3,413**	**183**	**115**	**61**	**3,997**
Interior									
Wheat	28	20	139	1,659	1,406	118	132	141	1,614
Corn	189	159	119	6,602	7,723	85	80	93	8,650
Soybeans	152	153	99	6,076	5,952	102	89	88	6,729
Total	**368**	**332**	**111**	**14,337**	**15,081**	**95**	**87**	**93**	**16,993**
Great Lakes									
Wheat	26	38	70	1,000	698	143	267	170	894
Corn	0	0	n/a	11	404	3	29	44	404
Soybeans	0	0	n/a	473	935	51	0	0	1,192
Total	**26**	**38**	**70**	**1,485**	**2,037**	**73**	**34**	**30**	**2,491**
Atlantic									
Wheat	0	0	n/a	37	69	54	n/a	0	69
Corn	0	0	n/a	99	124	80	10	4	138
Soybeans	11	48	23	1,149	1,709	67	69	42	2,047
Total	**11**	**48**	**23**	**1,285**	**1,902**	**68**	**65**	**37**	**2,253**
U.S. total from ports*									
Wheat	557	309	180	24,580	19,447	126	133	149	22,986
Corn	550	279	197	32,754	57,036	57	43	59	63,682
Soybeans	1,401	1,560	90	41,902	39,046	107	113	67	45,879
Total	**2,508**	**2,148**	**117**	**99,236**	**115,529**	**86**	**90**	**73**	**132,547**

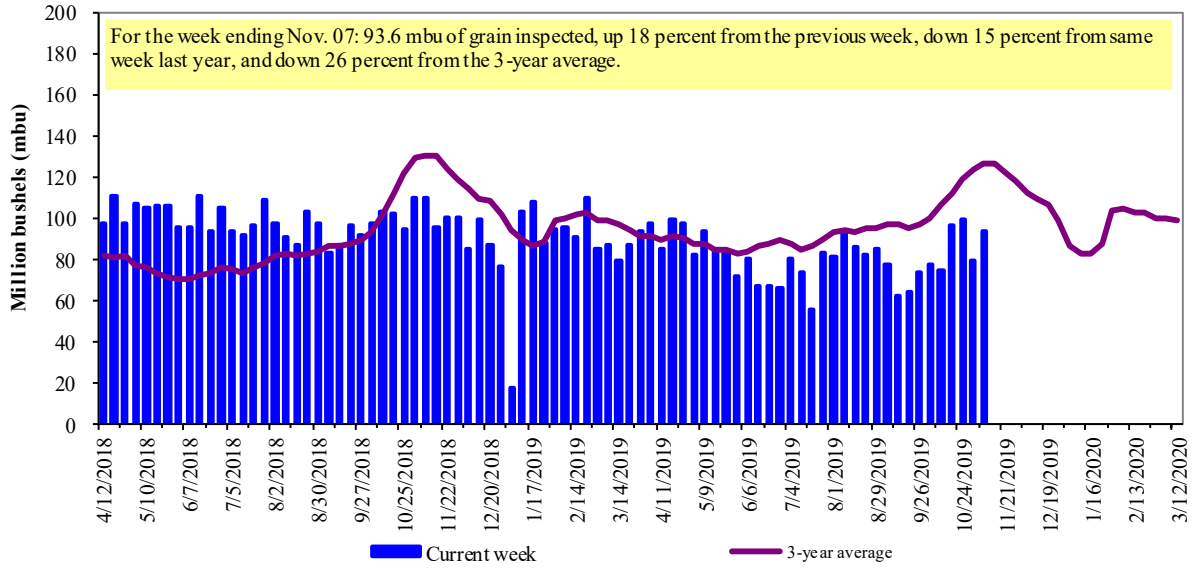
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: USDA, Federal Grain Inspection Service; YTD= year-to-date; n/a = not applicable or no change.

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)

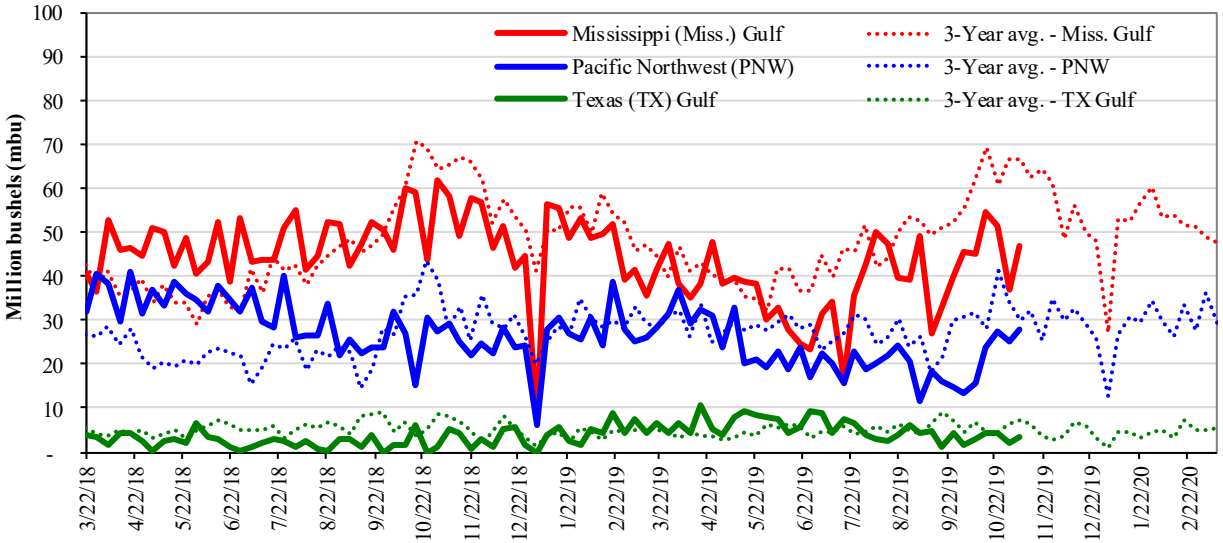


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

U.S. Grain inspections: U.S. Gulf and PNW[1] (wheat, corn, and soybeans)



Week ending 11/07/19 inspections (mbu):	
MS Gulf:	47.1
PNW:	27.8
TX Gulf:	3.3

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	up 28	up 80	up 30	up 10
Last Year (same wk):	down 19	down 34	down 20	down 5
3-yr avg. (4-wk. mov. Avg):	down 28	down 42	down 29	down 17

Source: USDA, Federal Grain Inspection Service.

Table 17

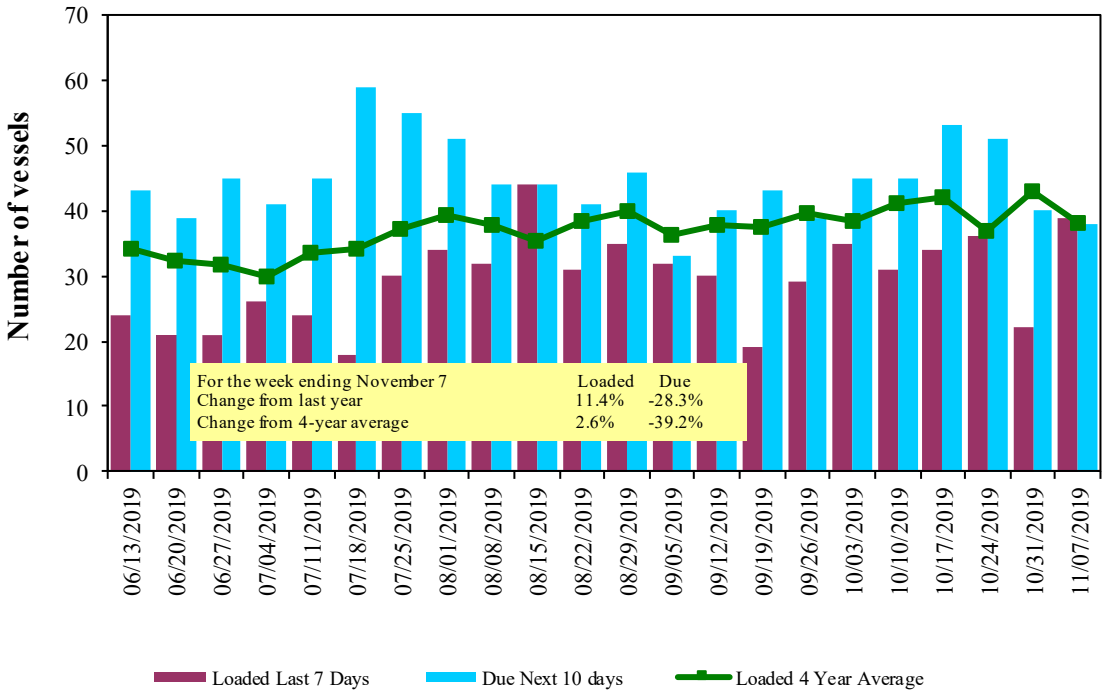
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
11/7/2019	37	39	38	16
10/31/2019	42	22	40	13
2018 range	(23...88)	(24...41)	(38...67)	(4...30)
2018 average	40	34	54	17

Source: USDA, Agricultural Marketing Service.

Figure 16

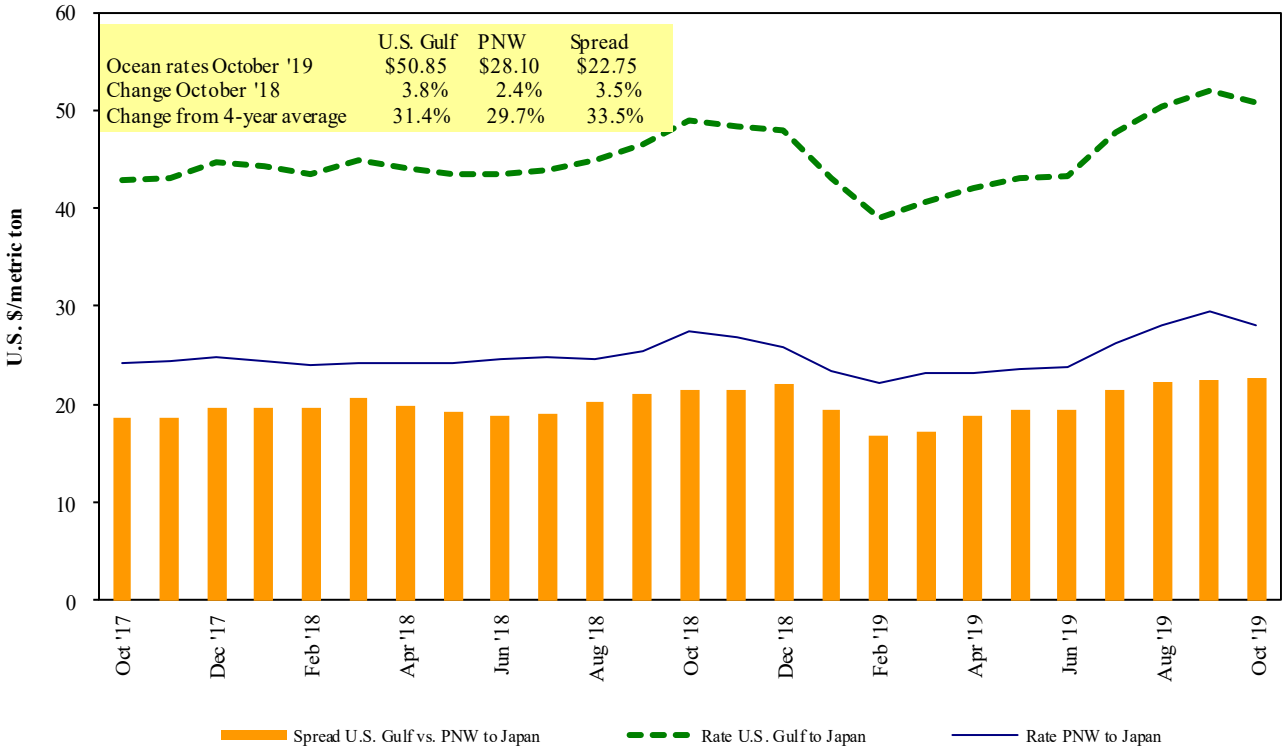
U.S. Gulf[1] vessel loading activity



[1]U.S. Gulf includes Mississippi, Texas, and East Gulf.
Source: USDA, Agricultural Marketing Service.

Figure 17

Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest.

Source: O'Neil Commodity Consulting.

Table 18

Ocean freight rates for selected shipments, week ending 11/09/2019

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Bangladesh	Wheat	Dec 10/20	48,990	79.92*
U.S. Gulf	China	Heavy Grain	Nov 15/18	66,000	49.00
U.S. Gulf	Pt Sudan	Sorghum	Sep 20/30	24,960	58.15*
U.S. Gulf	Somaliland	Sorghum	Sep 20/30	32,240	61.75*
PNW	Bangladesh	Wheat	Dec 10/20	23,080	74.44*
PNW	Philippines	Soybean Meal	Oct 31/31	15,390	49.82*
PNW	Vietnam	Soybean Meal	Oct 21/31	3,200	49.82*
PNW	Yemen	Wheat	Sep 5/15	35,380	59.59*
PNW	Yemen	Wheat	Sep 20/30	35,000	62.19*
Brazil	China	Heavy Grain	Oct 1/10	65,000	32.00
Ukraine	Egypt Med	Heavy Grain	Oct 19/23	60,000	13.50

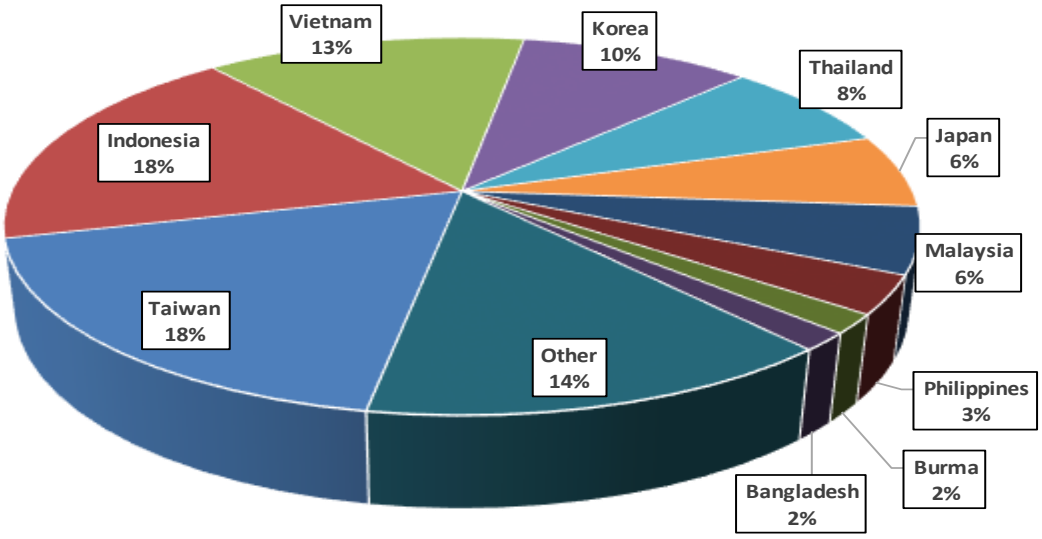
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

Source: Maritime Research, Inc.

In 2018, containers were used to transport 8 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2018 went to Asia, of which 13 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

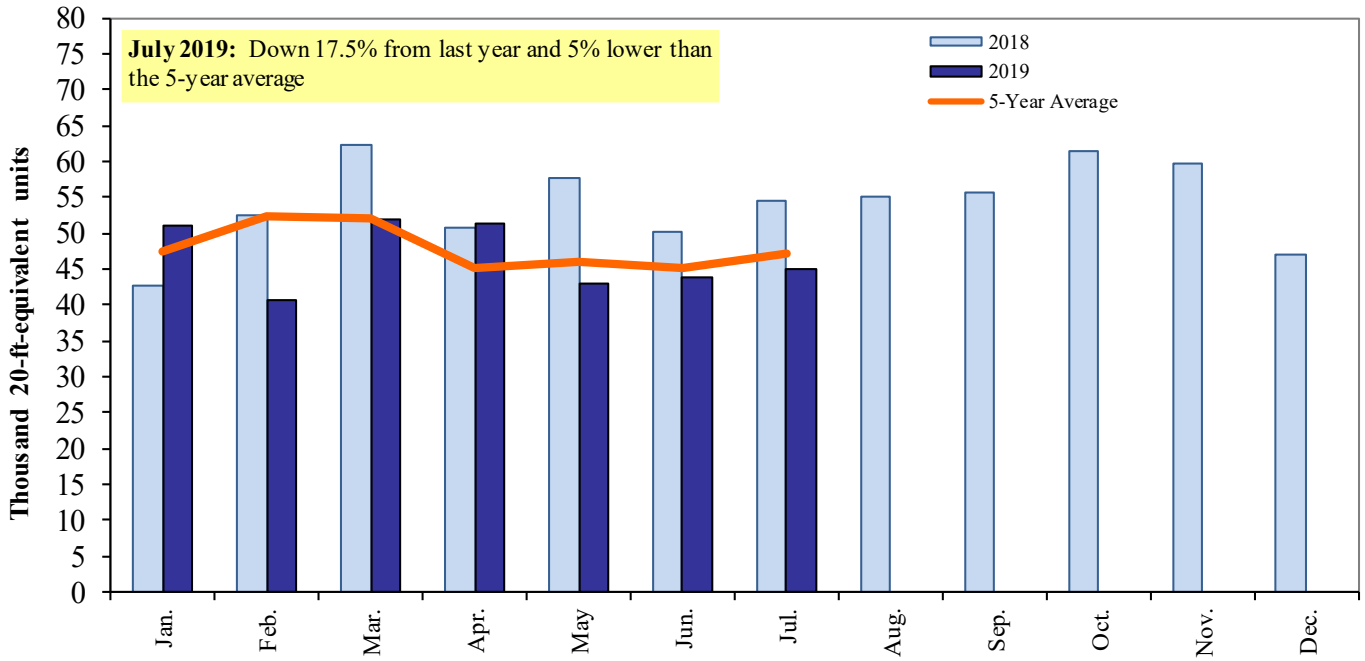
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-Jul 2019



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.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

Figure 19
Monthly Shipments of Containerized Grain to Asia



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.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

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