USDA United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service

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November 28, 2019

Contents

The next release is December 5, 2019

WEEKLY HIGHLIGHTS

Soybean Inspections Drive Increase in Total Grain Inspections

For the week ending November 21, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 3.08 million metric tons (mmt). Total grain inspections were up 12 percent from the previous week, up 15 percent from last year, and down 6 percent from the 3-year average. Grain inspections continued to increase primarily because of a 26-percent jump in inspections of soybeans. Inspections of soybeans were the highest since mid-November 2017, with over 70 percent destined to China. Corn and wheat inspections were down 7 percent and 9 percent, respectively, from the previous week. Inspections of grain increased 20 percent in the Pacific Northwest (PNW) and 9 percent in the Mississippi Gulf.

Brazil Expands Market for Wheat Imports

In a November 14 press release, U.S. Trade Representative Robert Lighthizer and U.S. Secretary of Agriculture Sonny Perdue welcomed Brazil's implementation of an annual duty-free tariff rate quota (TRQ) of 750,000 metric tons (mt) of wheat imports. Historically, most imports have originated duty-free from the Mercosur (South American trading bloc) countries of Argentina, Paraguay, and Uruguay. However, according to the United Nations Comtrade database, U.S. wheat made up 46 percent and 48 percent of Brazil's imports, respectively, in 2013 and 2014 when Brazil opened the TRQ to allay temporary shortages of wheat within Mercosur. Brazil's implementation of the TRQ for wheat could affect U.S. wheat transportation demand both by increasing export volumes and shifting volumes across ports. According to USDA's Foreign Agricultural Service, the United States exported 9.5 mmt of wheat to Brazil between 2009 and 2018. Of the total wheat exported to Brazil from 2009 to 2018, 6.4 mmt (67 percent) of it occurred in 2013 and 2014. The majority of the wheat exported to Brazil during those years originated in the western Gulf of Mexico ports of Houston-Galveston, TX and Port Arthur, TX. Those two Texas ports and the Port of New Orleans typically handle over 90 percent of wheat exports to Brazil and therefore may experience a temporary increase in transportation demand.

Barge Shipments Reach Yearly High

Barge shipments have set a new yearly high with 957,863 tons moving through the locks in week 47, the week ending on November 23. Together, week 46 (which had the third-largest volume of 2019) and week 47 had the most barge traffic in the locking system of any 2-week period in the year so far. However, despite this rally, the rolling 4-week average remains below that of the previous year and the 3-year average, as harvest, navigation, and export market conditions have affected the demand for shipping.

STB Extends Revenue Adequacy Hearing to 2 Days

Last week, the Surface Transportation Board (STB) provided a schedule of appearances for an upcoming hearing on revenue adequacy and announced the hearing will encompass 2 days (as a result of a high number of prospective speakers). The hearing will take place December 12-13, 2019 in Washington, DC. Participants are asked to address recommendations raised by STB's Rate Reform Task Force, such as the definition of long-term revenue adequacy, the possibility of a "rate increase constraint," bottleneck rate changes, and changes to the Simplified Stand-Alone Cost procedure.

Snapshots by Sector

Export Sales

For the week ending November 14, **unshipped balances** of wheat, corn, and soybeans totaled 23.3 mmt. This represents a 19-percent decrease in outstanding sales, compared to the same time last year. Net **corn export sales** reached .788 mmt, up 36 percent from the past week. Net **soybean export sales** were 1.52 mmt, up 22 percent from the previous week. Net weekly **wheat export sales** reached .438 mmt, up 83 percent from the from the previous week.

Rail

U.S. Class I railroads originated 22,331 **grain carloads** during the week ending November 16. This was a 2-percent increase from the previous week, 6 percent less than last year, and 6 percent lower than the 3-year average.

Average December shuttle **secondary railcar** bids/offers (per car) were $100 below tariff for the week ending November 21. This was $38 more than last week and $50 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending November 23, **barge grain movements** totaled 957,863 tons. This was an 8-percent increase from the previous week and 4 percent more than the same period last year.

For the week ending November 23, 622 grain barges **moved down river**—60 more barges than the previous week. There were 855 grain barges **unloaded in New Orleans**, 16 percent more than the previous week.

Ocean

For the week ending November 21, 30 **oceangoing grain vessels** were loaded in the Gulf—19 percent less than the same period last year. Within the next 10 days (starting November 22), 44 vessels were expected to be loaded—19 percent fewer than the same period last year.

As of November 21, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $46.25. This was 1 percent less than the previous week. The rate from PNW to Japan was $24.75 per mt, unchanged from the previous week.

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Web: **http://dx.doi.org/10.9752/TS056.11-28-2019**

Feature Article/Calendar

Date	Event	Location	Phone/Website
Dec. 4	Ag Shipper Workshop	Minneapolis, MN	www.agtrans.org/workshops
Dec. 5	Ag Shipper Workshop	Kansas City, MO	www.agtrans.org/workshops
Dec. 8-10	NGFA's 48th Annual Country Elevator Conference	Indianapolis, IN	www.ngfa.org
Dec. 12	Surface Transportation Board Hearing on Railroad Revenue Adequacy	Washington, DC	https://prod.stb.gov/news-communications/latest-news/pr-19-10/
Jan. 12-16	Transportation Research Board's 99th Annual Meeting	Washington, DC	http://www.trb.org/AnnualMeeting/AnnualMeeting.aspx
Jan. 13-15	Michigan Agribusiness Association Meeting	Lansing, MI	517-336-0223
Jan. 12-18	U.S. Wheat Associates and National Association of Wheat Growers Joint Winter Meeting	Washington, DC	https://www.uswheat.org/meeting/2020-usw-nawg-joint-winter-meeting/
Jan. 15-16	South Dakota Ag Expo	Sioux Falls, SD	605-224-2445
Jan. 28-30	International Feed Expo	Atlanta, GA	703-524-0810
Jan. 29	Ag Shipper Workshop	Portland, OR	www.agtrans.org/workshops
Jan. 31	Ag Shipper Workshop	Boise, ID	www.agtrans.org/workshops
Feb. 11-12	Agribusiness Showcase/Conference	Des Moines, IA	515-262-8323
Feb. 16-18	Grain and Feed Association of Illinois	Springfield, IL	217-787-2417
Feb. 18	Ag Shipper Workshop	Sacramento, CA	www.agtrans.org/workshops
Feb. 19	Ag Shipper Workshop	Fresno, CA	www.agtrans.org/workshops
Feb. 20-21	USDA's 96th Agricultural Outlook Forum	Arlington, VA	https://www.usda.gov/oce/forum/
Mar. 3-5	Minnesota Grain and Feed Association	Bloomington, MN	651-454-8212
Mar. 8-10	NGFA Convention	Austin, TX	www.ngfa.org
Mar. 12-13	Transportation Research Forum's 61st Annual Meeting	Jersey City, NJ	http://annualforum.trforum.org/

Grain Transportation Indicators

Table 1
Grain transport cost indicators[1]

For the week ending	Truck	Rail: Unit train	Rail: Shuttle	Barge	Ocean: Gulf	Ocean: Pacific
11/27/19	206	n/a	221	206	207	176
11/20/19	206	n/a	221	220	208	176

[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.

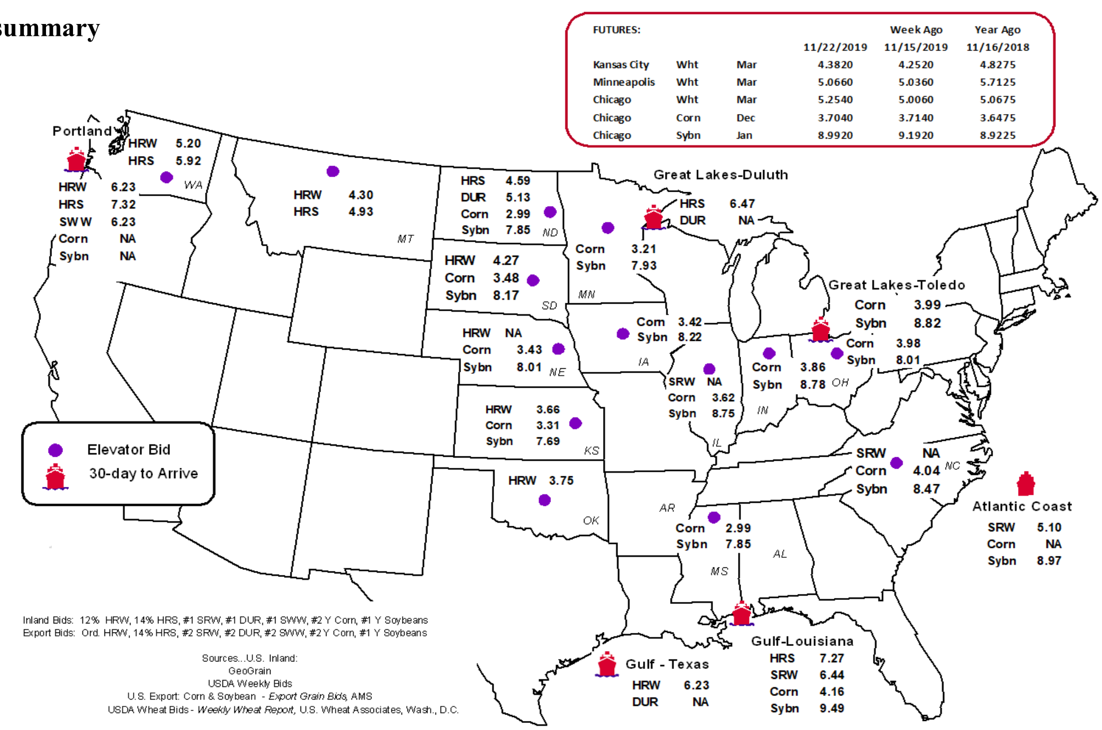
Table 2
Market Update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	11/22/2019	11/15/2019
Corn	IL–Gulf	-0.54	-0.56
Corn	NE–Gulf	-0.73	-0.75
Soybean	IA–Gulf	-1.27	n/a
HRW	KS–Gulf	-2.57	-2.48
HRS	ND–Portland	-2.73	-2.61

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]
11/20/2019[p]	564	875	5,916	96	7,451	11/16/2019	2,899
11/13/2019[r]	335	554	6,273	222	7,384	11/9/2019	2,597
2019 YTD[r]	38,633	48,760	230,277	15,485	333,155	2019 YTD	113,357
2018 YTD[r]	21,382	43,246	285,418	19,554	369,600	2018 YTD	115,047
2019 YTD as % of 2018 YTD	181	113	81	79	90	% change YTD	99
Last 4 weeks as % of 2018[2]	121	99	118	42	110	Last 4wks. % 2018	85
Last 4 weeks as % of 4-year avg.[2]	47	41	94	24	75	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.

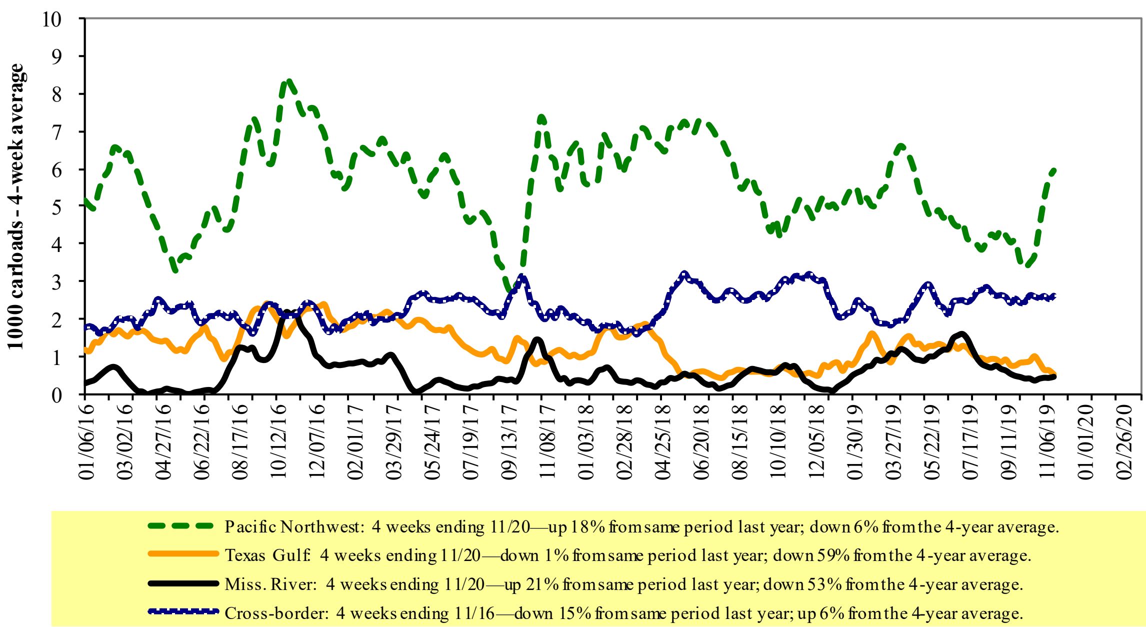
[3] Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads. to reflect switching between Kansas City Southern de Mexico (KCSM) and Grupo Mexico.

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	
11/16/2019	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,232	2,886	12,309	1,077	4,827	22,331	4,051	4,906
This week last year	1,961	2,445	13,186	1,066	5,024	23,682	5,379	5,270
2019 YTD	82,572	122,908	501,627	52,187	232,955	992,249	187,938	206,880
2018 YTD	89,365	116,887	565,249	43,034	239,030	1,053,565	186,432	216,654
2019 YTD as % of 2018 YTD	92	105	89	121	97	94	101	95
Last 4 weeks as % of 2018*	77	103	97	127	101	98	90	100
Last 4 weeks as % of 3-yr. avg.**	74	77	98	115	88	91	91	98
Total 2018	98,978	133,242	635,458	48,638	267,713	1,184,029	211,749	244,697

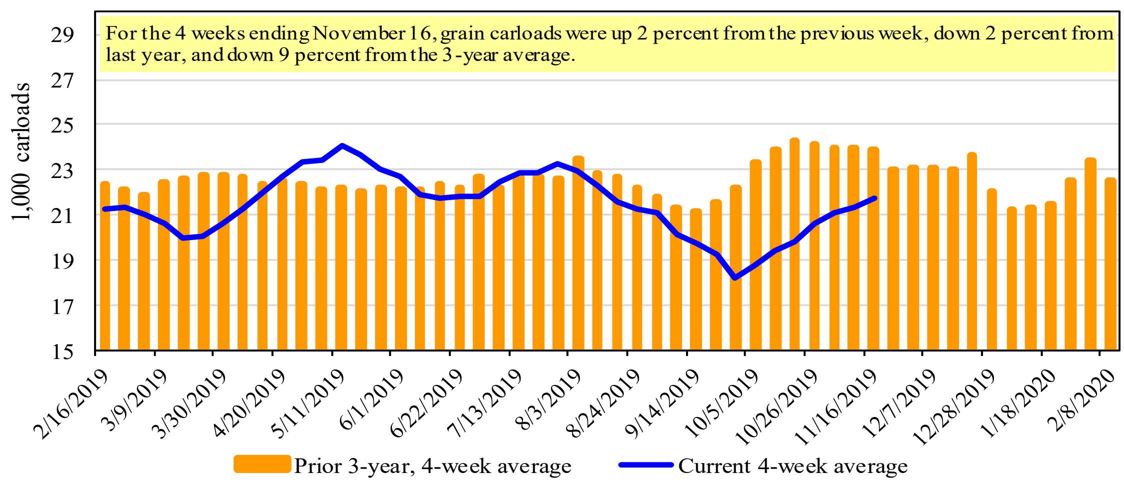
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 11/21/2019		Dec-19	Dec-18	Jan-20	Jan-19	Feb-20	Feb-19	Mar-20	Mar-19
		Delivery period							
BNSF[3]	COT grain units	0	no offer	0	no bid	1	no bid	0	no bid
	COT grain single-car	16	no offer	0	54	0	19	0	9
UP[4]	GCAS/Region 1	10	no bid	no offer	no bid	no offer	no offer	n/a	n/a
	GCAS/Region 2	no bid	no bid	no bid	32	no bid	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.

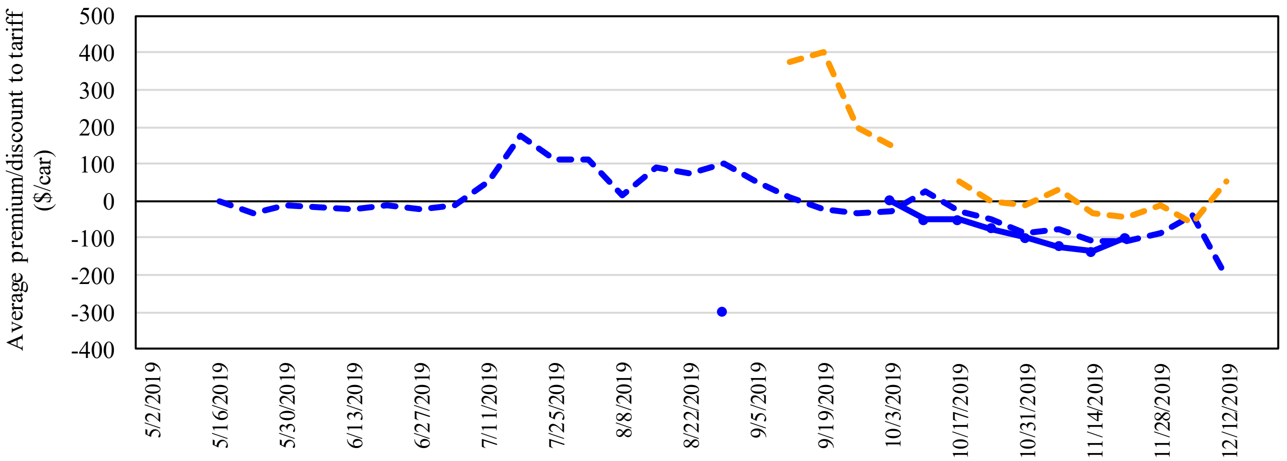
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 December 2019, secondary market

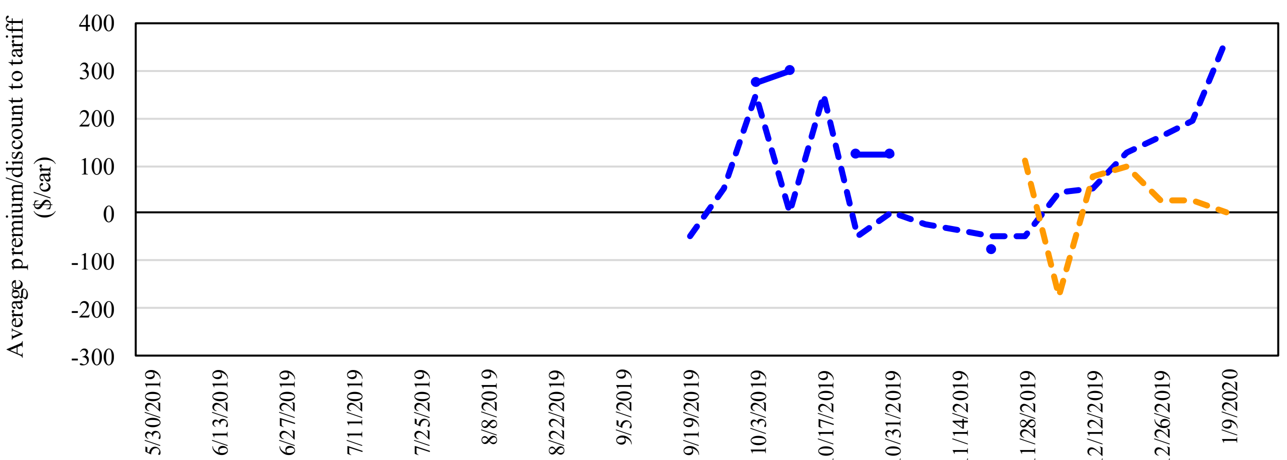


11/21/2019	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$0	-$200

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $38 this week and are $100 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 January 2020, secondary market



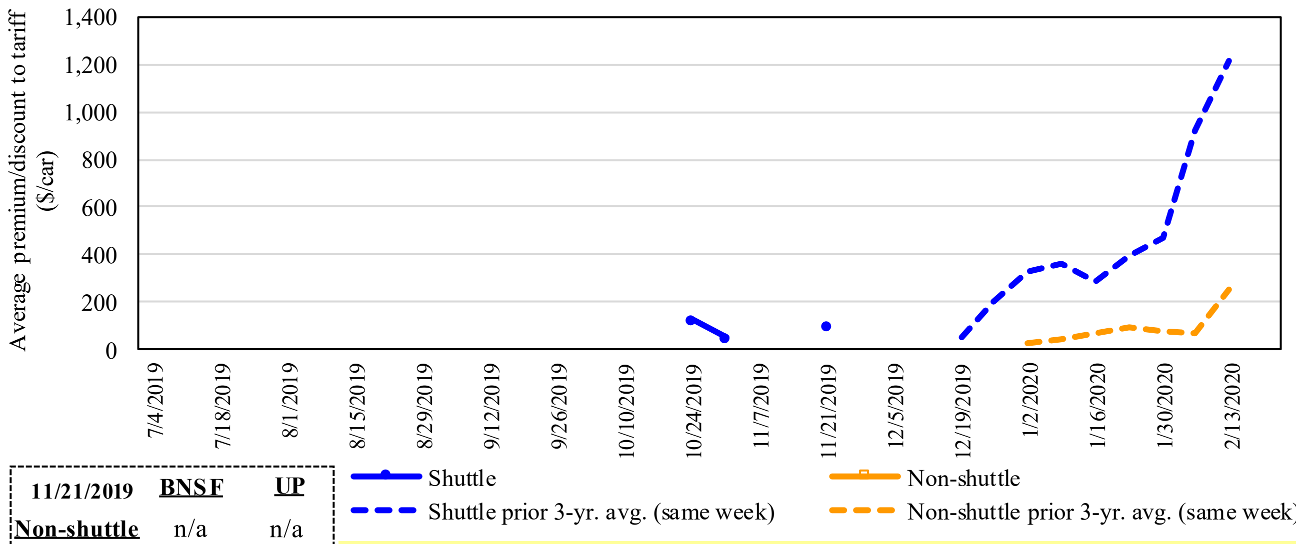
11/21/2019	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$100	-$50

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 $375 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 February 2020, secondary market



11/21/2019	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$100	n/a

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 $25 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.

Table 6

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

	For the week ending: 11/21/2019	Delivery period: Dec-19	Jan-20	Feb-20	Mar-20	Apr-20	May-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**	**0**	**(100)**	**100**	**150**	**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	50	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**(200)**	**(50)**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(62)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	50	(50)	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

Commodity	Origin state	Destination region	Tariff rate/car[1]	Fuel surcharge per car[2]	Tariff plus surcharge per: metric ton[3]	bushel[3]	Percent change[4] Y/Y
Date:	November 2019						
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.

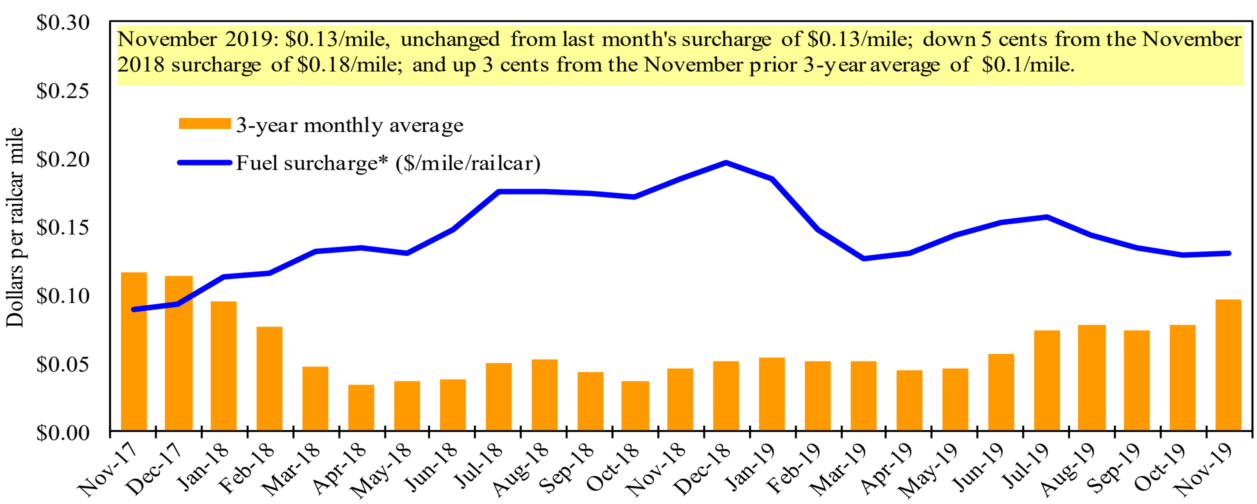
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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]

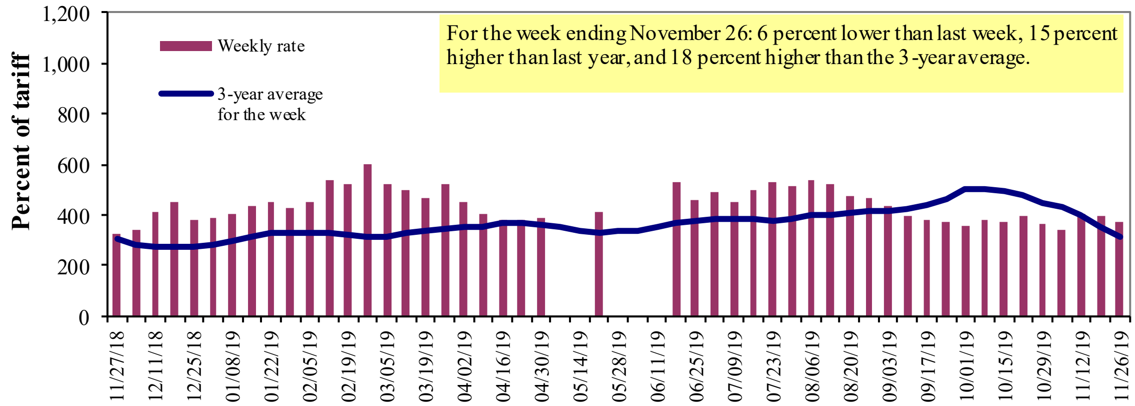


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.
Sources: 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]	11/26/2019	-	374	371	255	266	266	240
	11/19/2019	412	417	396	283	280	280	293
$/ton	11/26/2019	-	19.90	17.21	10.17	12.48	10.75	7.54
	11/19/2019	25.50	22.18	18.37	11.29	13.13	11.31	9.20
Current week % change from the same week:								
	Last year	-	12	15	9	-5	-5	7
	3-year avg. [2]	-	13	18	8	-15	-14	14
Rate[1]	December	-	-	379	268	269	269	243
	February	-	-	388	261	265	265	240

[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

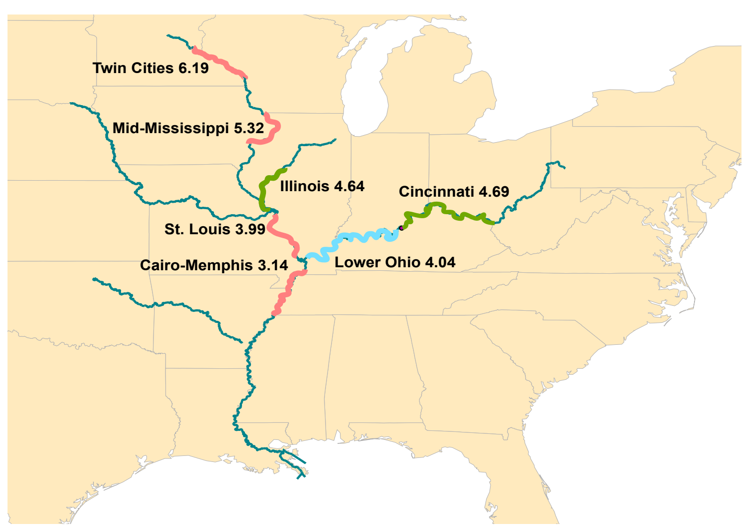
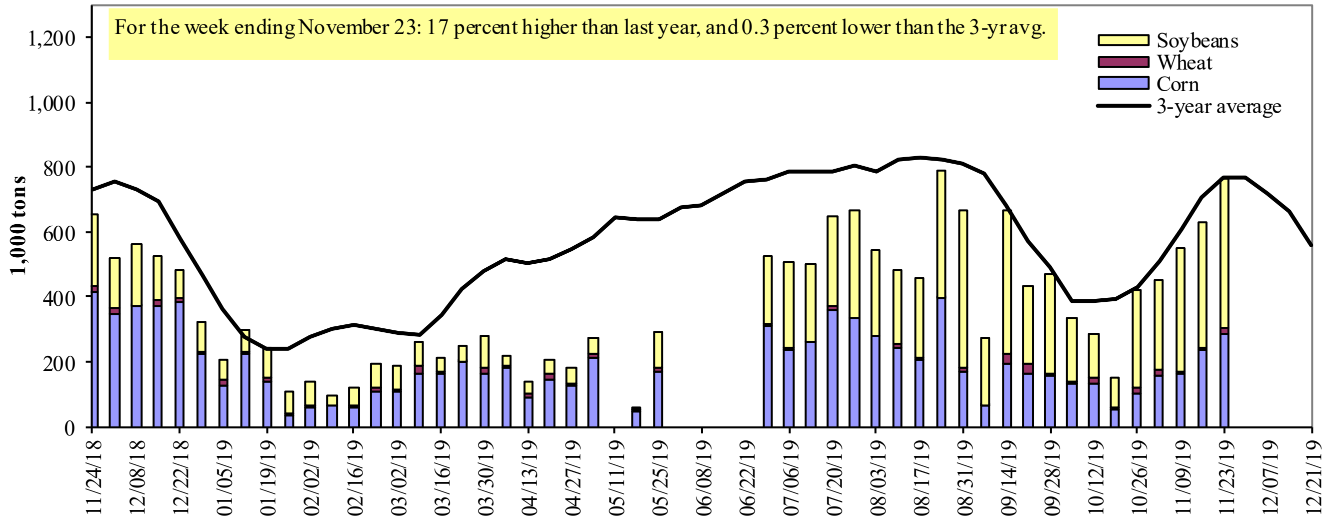


Figure 10

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 11/23/2019	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	154	17	257	0	429
Winfield, MO (L25)	230	10	378	0	618
Alton, IL (L26)	280	19	438	0	737
Granite City, IL (L27)	285	19	462	2	768
Illinois River (LAGRANGE)	66	6	60	0	132
Ohio River (OLMSTED)	65	0	103	0	167
Arkansas River (L1)	0	3	20	0	23
Weekly total - 2019	350	22	584	2	958
Weekly total - 2018	513	27	377	0	917
2019 YTD[1]	11,255	1,491	12,453	143	25,342
2018 YTD[1]	21,265	1,535	11,460	101	34,362
2019 as % of 2018 YTD	53	97	109	141	74
Last 4 weeks as % of 2018[2]	65	78	124	200	94
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.

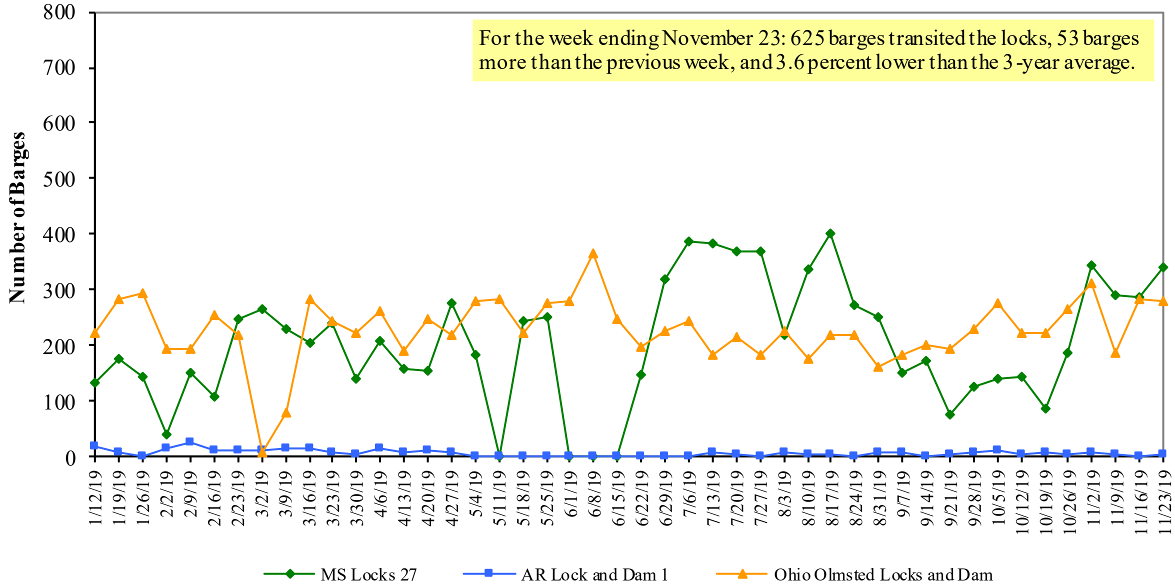
[2] As a percent of same period in 2018.

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

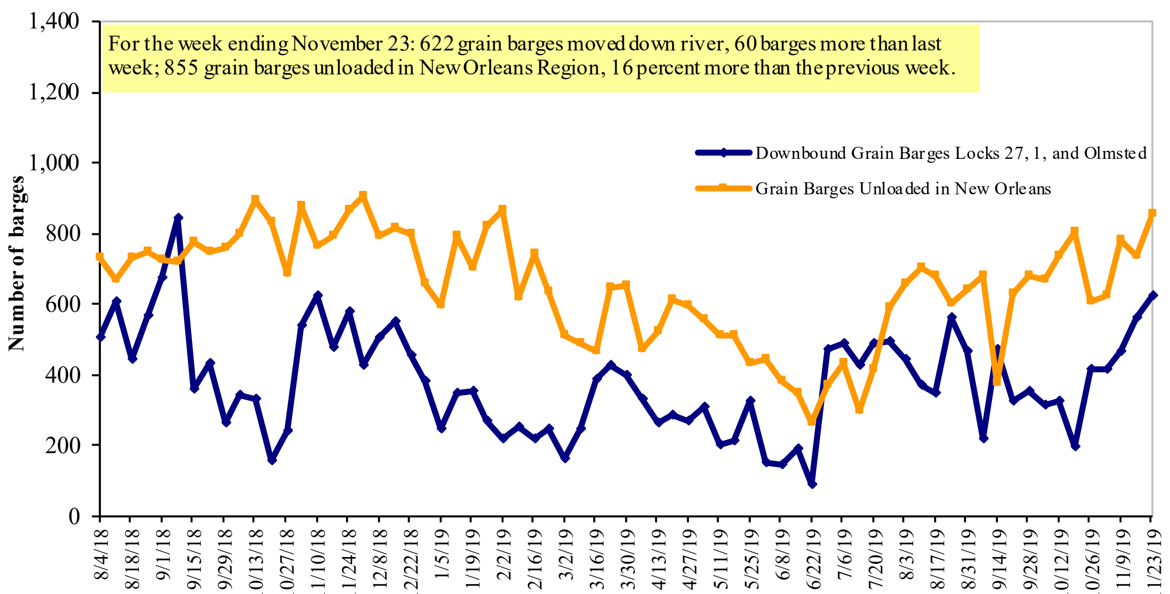
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 11/25/2019 (U.S. $/gallon)

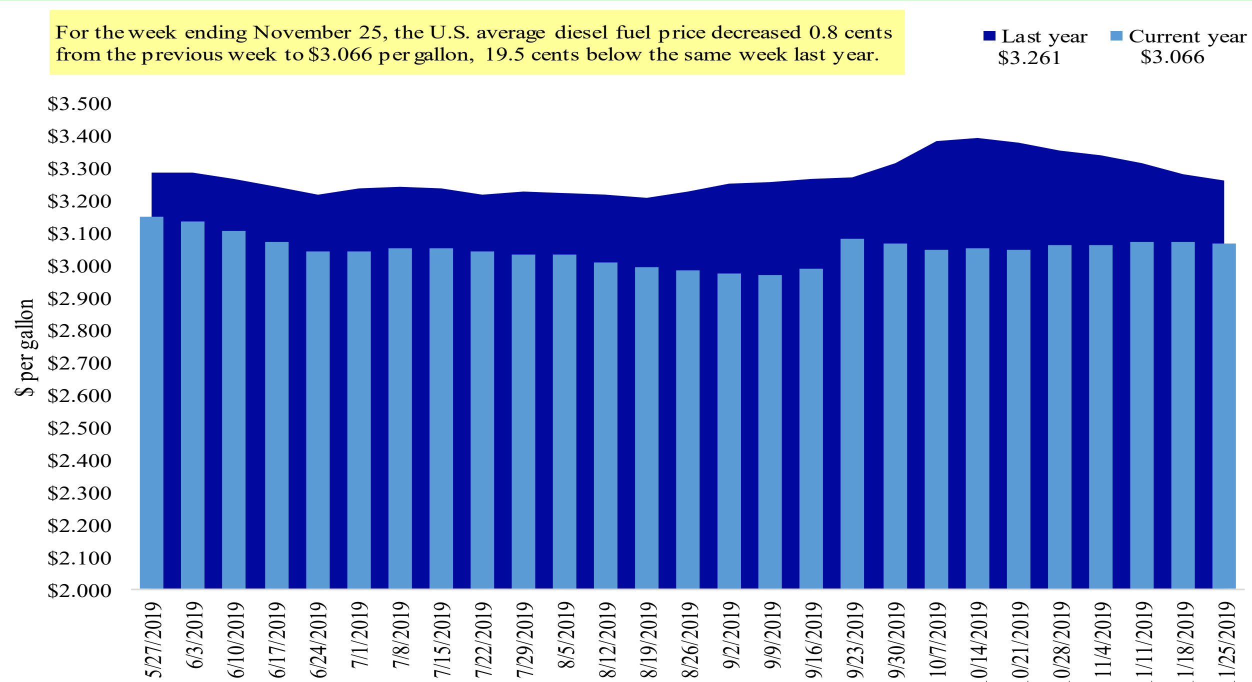
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.054	0.001	-0.223
	New England	3.063	0.014	-0.281
	Central Atlantic	3.247	0.001	-0.200
	Lower Atlantic	2.921	-0.001	-0.224
II	Midwest	2.969	-0.002	-0.216
III	Gulf Coast	2.776	-0.016	-0.259
IV	Rocky Mountain	3.246	0.014	-0.093
V	West Coast	3.720	-0.036	-0.019
	West Coast less California	3.387	-0.057	-0.068
	California	3.983	-0.020	0.019
Total	U.S.	3.066	-0.008	-0.195

[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]									
11/14/2019	1,188	510	1,173	783	257	3,910	8,048	11,352	23,311
This week year ago	1,370	709	1,806	1,127	156	5,167	11,755	11,737	28,659
Cumulative exports-marketing year[2]									
2019/20 YTD	4,607	1,366	3,117	2,203	412	11,705	5,214	12,368	29,287
2018/19 YTD	2,773	1,081	2,872	2,377	244	9,347	12,549	10,824	32,720
YTD 2019/20 as % of 2018/19	166	126	109	93	169	125	42	114	90
Last 4 wks as % of same period 2018/19	84	77	67	77	180	79	67	98	82
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 11/14/2019	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 -			
Mexico	6,730	8,072	(17)	14,659
Japan	1,792	4,288	(58)	11,955
Korea	25	1,811	(99)	4,977
Colombia	775	1,256	(38)	4,692
Peru	0	1,029	(100)	2,808
Top 5 Importers	**9,322**	**16,456**	**(43)**	**39,091**
Total U.S. corn export sales	**13,263**	**24,304**	**(45)**	**54,024**
% of projected exports	28%	46%		
Change from prior week[2]	**788**	**877**		
Top 5 importers' share of U.S. corn export sales	70%	68%		72%
USDA forecast, November 2019	**47,074**	**52,545**	**(10)**	
Corn use for ethanol USDA forecast, November 2019	**136,525**	**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 Agricultural Service.

Table 14

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

For the week ending 11/14/2019	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	8,476	580	1361	25,733
Mexico	2,672	3,352	(20)	4,271
Indonesia	621	781	(21)	2,386
Japan	921	976	(6)	2,243
Egypt	1,042	850	23	1,983
Top 5 importers	**13,731**	**6,539**	**110**	**36,616**
Total U.S. soybean export sales	**23,721**	**22,561**	**5**	**53,746**
% of projected exports	49%	47%		
change from prior week[2]	**1,517**	**681**		
Top 5 importers' share of U.S. soybean export sales	58%	29%		**68%**
USDA forecast, November 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 11/14/2019	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	1,830	2,192	(16)	3,047
Mexico	2,388	1,745	37	3,034
Japan	1,632	1,797	(9)	2,695
Nigeria	958	628	52	1,564
Indonesia	399	611	(35)	1,381
Korea	865	992	(13)	1,355
Taiwan	772	672	15	1,164
Egypt	101	100	1	821
Thailand	462	538	(14)	747
Iraq	262	364	(28)	574
Top 10 importers	**9,668**	**9,638**	0	**16,382**
Total U.S. wheat export sales	**15,615**	**14,514**	**8**	**24,388**
% of projected exports	60%	57%		
change from prior week[2]	**438**	**331**		
Top 10 importers' share of U.S. wheat export sales	62%	66%		67%
USDA forecast, November 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 11/21/19	Previous week*	Current week as % of previous	2019 YTD*	2018 YTD*	2019 YTD as % of 2018 YTD	Last 4-weeks as % of: Last year	Prior 3-yr. avg.	2018 total*
Pacific Northwest									
Wheat	312	232	135	12,678	11,685	108	121	147	13,315
Corn	37	27	134	6,986	18,609	38	4	10	20,024
Soybeans	630	554	114	10,499	7,501	140	531	111	7,719
Total	**979**	**813**	**120**	**30,164**	**37,795**	**80**	**119**	**99**	**41,058**
Mississippi Gulf									
Wheat	17	117	15	4,224	3,550	119	90	121	3,896
Corn	330	406	81	19,276	31,135	62	55	67	33,735
Soybeans	1,214	910	133	27,011	24,698	109	106	77	28,124
Total	**1,561**	**1,433**	**109**	**50,512**	**59,382**	**85**	**87**	**75**	**65,755**
Texas Gulf									
Wheat	45	59	75	5,763	2,773	208	94	66	3,198
Corn	0	0	n/a	579	702	83	0	0	730
Soybeans	0	0	n/a	2	69	2	n/a	0	69
Total	**45**	**59**	**75**	**6,344**	**3,543**	**179**	**82**	**38**	**3,997**
Interior									
Wheat	24	38	62	1,732	1,468	118	113	118	1,614
Corn	227	206	110	7,057	8,050	88	115	116	8,650
Soybeans	147	136	108	6,375	6,194	103	112	105	6,729
Total	**398**	**380**	**105**	**15,164**	**15,712**	**97**	**114**	**112**	**16,993**
Great Lakes									
Wheat	45	41	111	1,086	742	146	220	268	894
Corn	0	0	n/a	11	404	3	n/a	0	404
Soybeans	0	0	n/a	473	1,092	43	0	0	1,192
Total	**45**	**41**	**111**	**1,571**	**2,237**	**70**	**44**	**43**	**2,491**
Atlantic									
Wheat	0	0	n/a	37	69	54	n/a	0	69
Corn	0	0	n/a	99	129	77	0	0	138
Soybeans	53	18	301	1,221	1,843	66	52	35	2,047
Total	**53**	**18**	**301**	**1,358**	**2,041**	**67**	**50**	**32**	**2,253**
U.S. total from ports*									
Wheat	443	487	91	25,522	20,287	126	115	124	22,986
Corn	594	640	93	34,008	59,028	58	47	64	63,682
Soybeans	2,044	1,618	126	45,582	41,396	110	132	80	45,879
Total	**3,081**	**2,745**	**112**	**105,113**	**120,711**	**87**	**96**	**81**	**132,547**

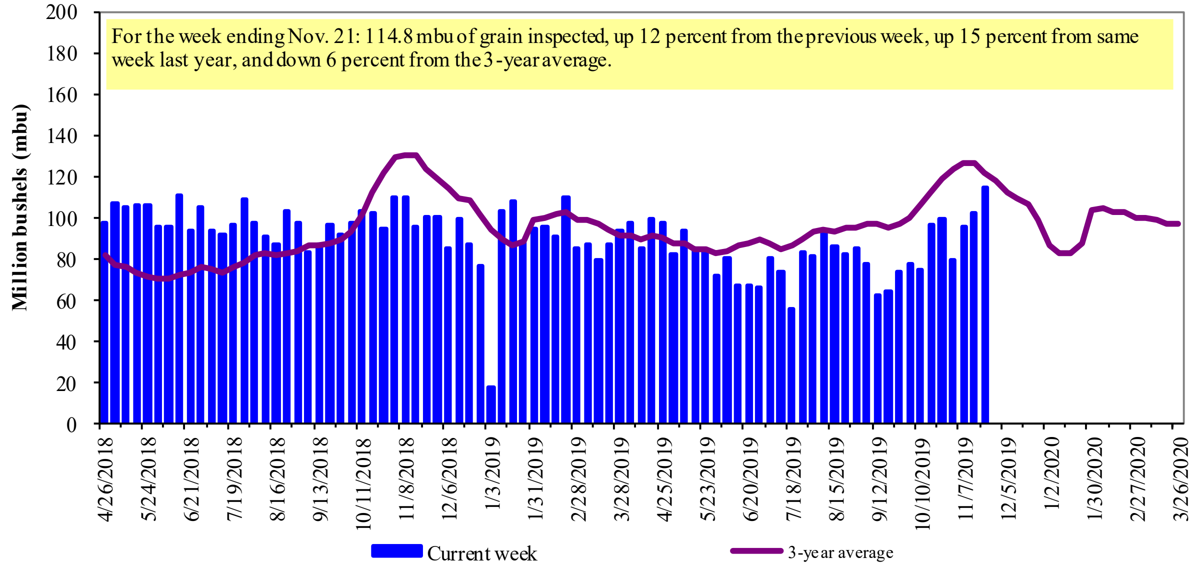
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

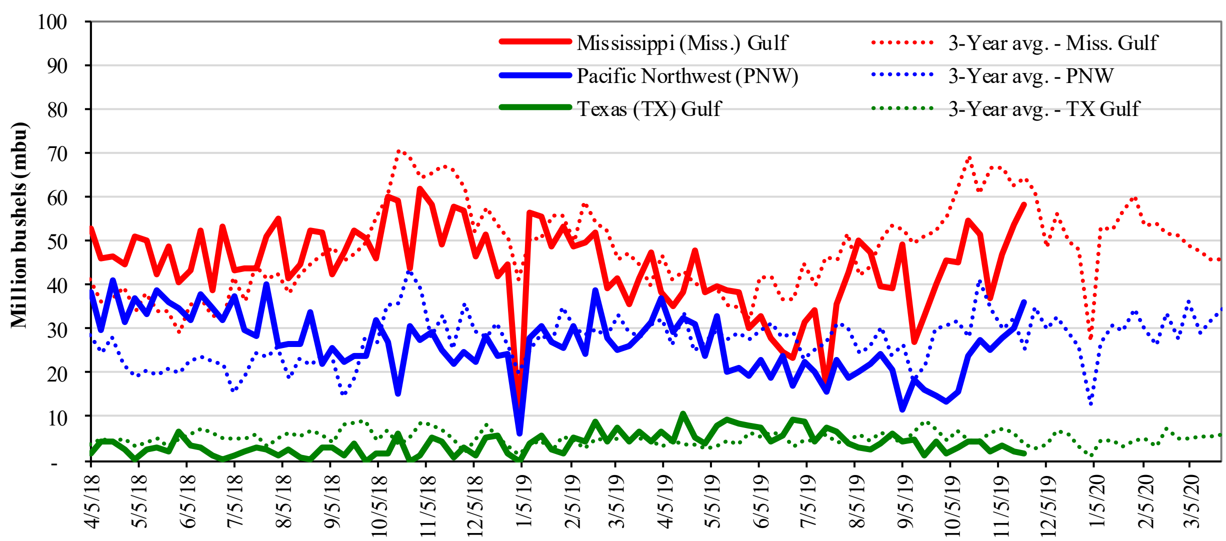


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 11/21/19 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf:	58.2	Last wk:	up 8	down 25	up 7	up 20
PNW:	36.1	Last Year (same wk):	unchanged	up 197	up 3	up 64
TX Gulf:	1.6	3-yr avg. (4-wk. mov. Avg):	down 10	down 73	down 16	up 18

Source: USDA, Federal Grain Inspection Service.

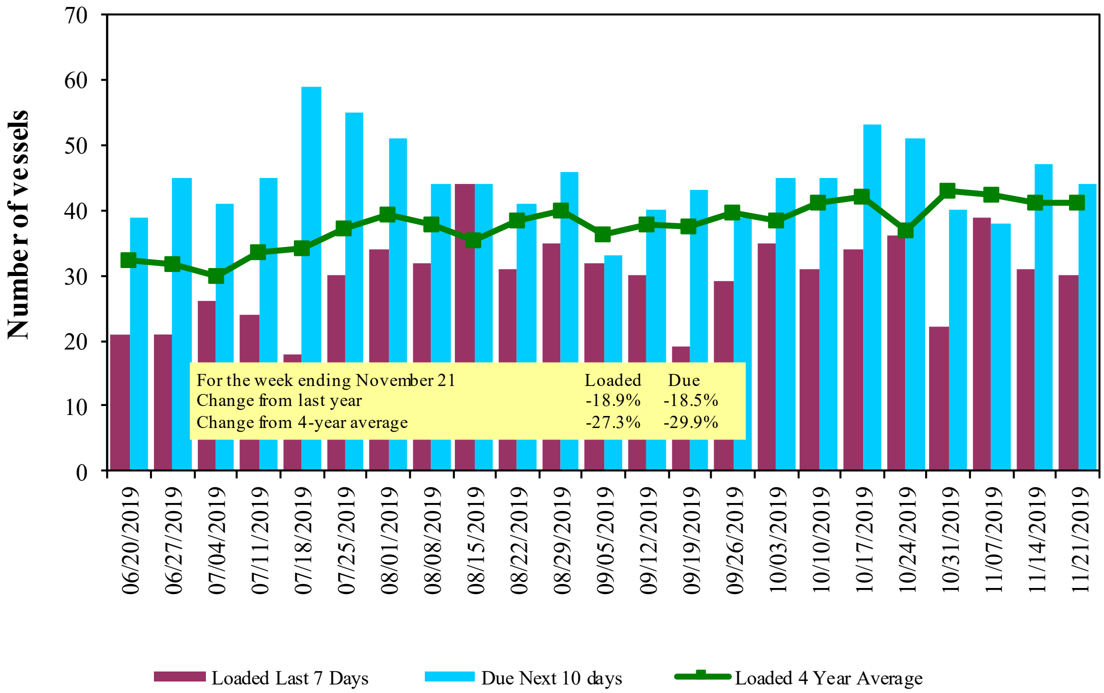
Ocean Transportation

Table 17
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
11/21/2019	34	30	44	15
11/14/2019	31	31	47	17
2018 range	(23...88)	(24...41)	(38...67)	(4...30)
2018 average	40	34	54	17

Source: USDA, Agricultural Marketing Service.

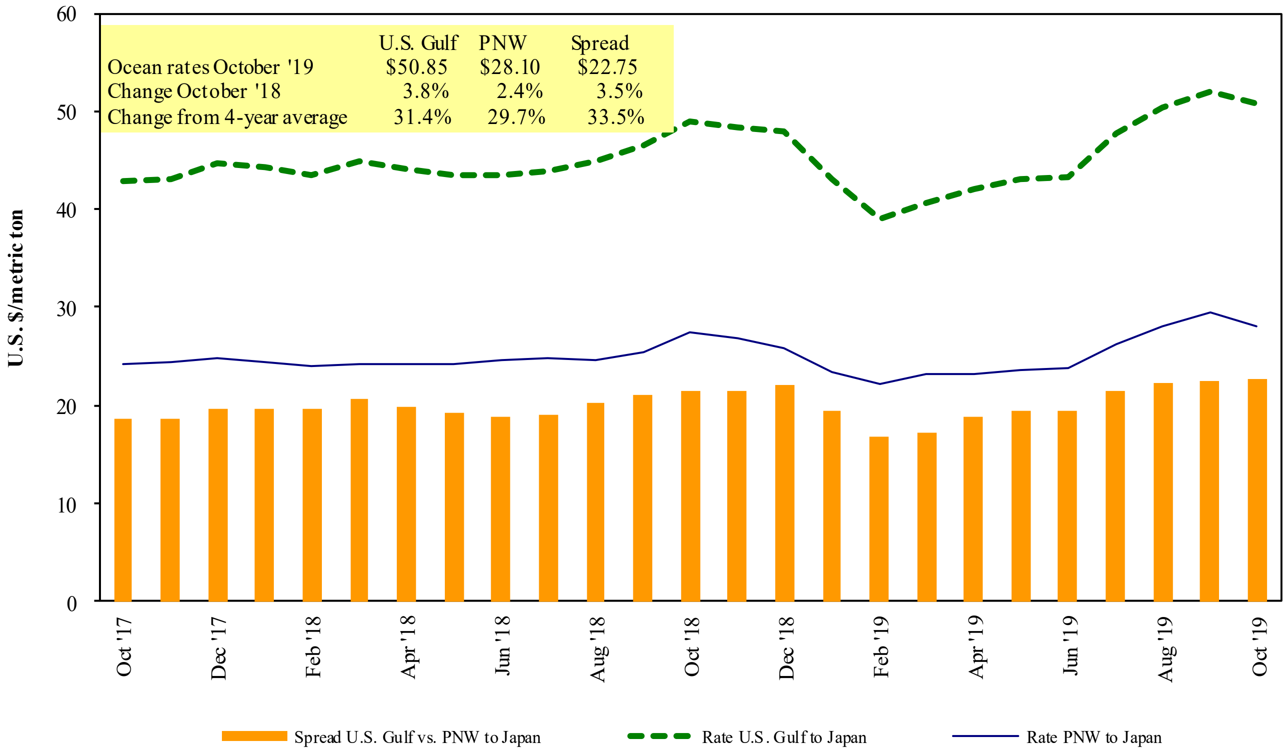
Figure 16
U.S. Gulf[1] vessel loading activity



[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 11/23/2019

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
Brazil	Japan	Corn	Dec 22/31	49,000	37.25 op 37.15
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.

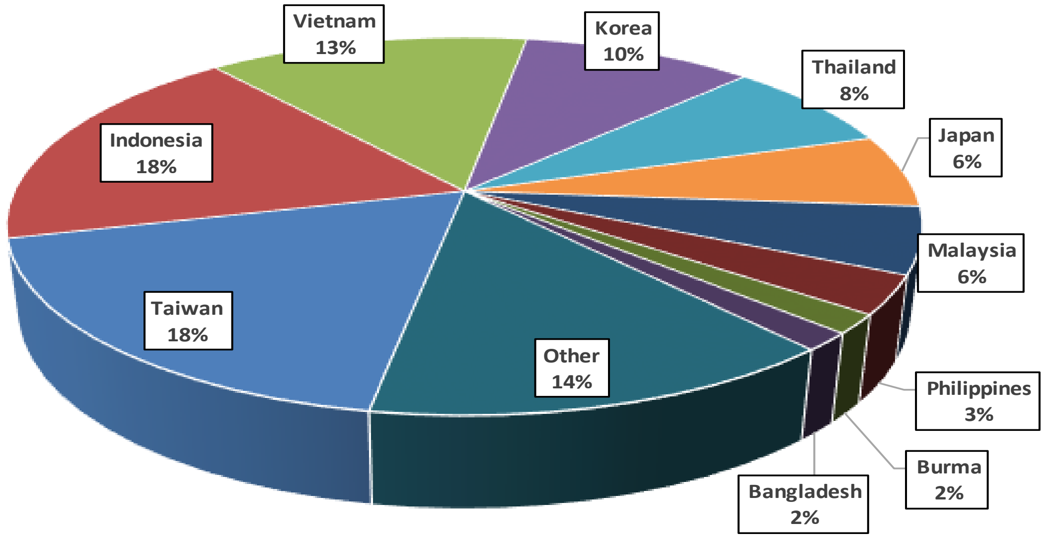
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated; op = option.

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

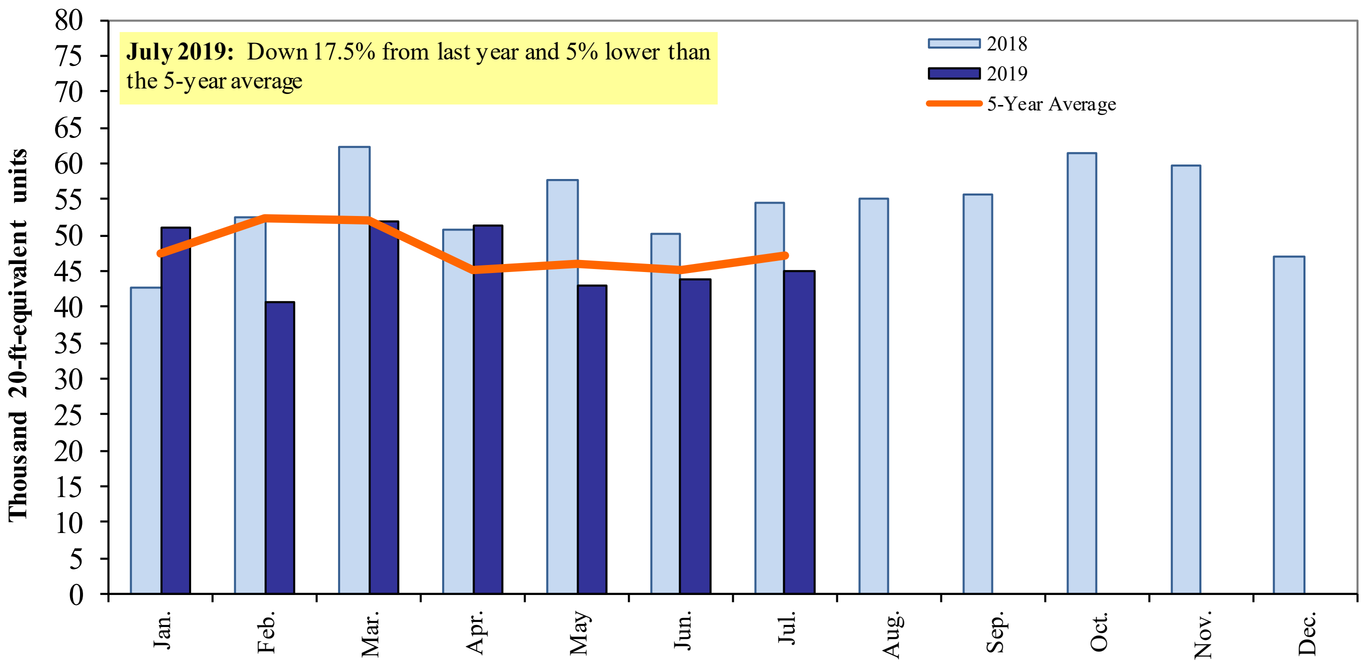


Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 1001, 100190, 1002, 1003 100300, 1004, 100400, 1005, 100590, 1007, 100700, 1102, 110100, 230310, 110220, 110290, 1201, 120100, 230210, 230990, 230330, and 120810.

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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