USDA United States Department of Agriculture

Grain Transportation Report

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

Contact Us

February 7, 2019

Contents

The next release is February 14, 2019

WEEKLY HIGHLIGHTS

Total Grain Inspections Up Slightly

For the week ending January 31, **total inspections of grain** (corn, wheat, and soybeans), for export from all major U.S. export regions, reached 2.38 million metric tons (mmt), which is up 2 percent from the previous week, down 18 percent from last year, and 9 percent below the 3-year average. Wheat inspections increased 20 percent from week-to-week, as shipments to Asia and Latin America increased. Inspections of soybeans increased 3 percent from the previous week, but corn inspections dropped 7 percent. Pacific Northwest (PNW) grain inspections decreased 9 percent from the previous week, while Mississippi Gulf inspections increased 4 percent. Inspections of grain during the last four weeks are 4 percent below last year and 2 percent below the 3-year average.

Grain Barge Tonnages Drop in 2018

In 2018, total annual grain barge shipments along the locking portions of the Mississippi, Arkansas, and Ohio rivers were 37.98 million tons, 7 percent lower than last year and 5 percent lower than the 3-year average. Total soybean movements in 2018 were 1.67 million tons, 24 percent lower than 2017 and 18 percent lower than the 3-year average; mainly due to reduced sales to China. Total wheat movements in 2018 were 12.82 million tons, 20 percent lower than last year and 22 percent lower than the 3-year average. On the other hand, the total corn movements were 22.24 million tons, 5 percent higher than last year and 6 percent higher than the 3-year average. .

Diesel Fuel Prices Level after Three Months of Consistent Decline

After more than a 3-month steady decline, during the past two weeks U.S. average on-highway diesel fuel prices leveled out near $2.966 per gallon. Prices increased only 0.1 cents during the week ending February 4, but were 12 cents below the same week last year. According to the Energy Information Administration’s (EIA)latest Short-Term Energy Outlook, crude oil prices also fell in November and December after October averages reached the highest level since October 2014. EIA said, “The price decline in late 2018 largely reflected rising oil inventories as a result of record levels of crude oil production from the United States, Russia, and Saudi Arabia. Prices also fell as a result of uncertainties about global economic indicators and future oil demand growth.”

BNSF Reports Almost $3 Billion in Customer Investments Last Year

Last week, BNSF Railway (BNSF) announced that its customers invested nearly $3 billion in 2018 to create or expand their facilities. According to the press release, it is “the eighth consecutive year that BNSF customers and local economic development organizations have invested more than $1 billion in a calendar year.” Among the customers highlighted, Dakota Plains opened a new $40 million grain terminal in Napa Junction, SD, capable of handling 110-car trains. It is one of the largest grain facilities in southeastern South Dakota.

Snapshots by Sector

Rail

U.S. Class I railroads originated 21,435 **grain carloads** for the week ending January 26, down 6 percent from the previous week, 5 percent from last year, and 3 percent from the 3-year average.

Average February shuttle **secondary railcar** bids/offers per car were $230 above tariff for the week ending January 31, up $328 from last week, and up $164 from last year. Average non-shuttle secondary railcar bids/offers per car were $50 below tariff, down $142 from last week, and down $69 from last year.

Barge

For the week ending February 2, **barge grain movements** totaled 355,301 tons, 22 percent lower than the previous week and down 47 percent from the same period last year.

For the week ending February 2, 220 grain barges **moved down river**, 51 barges less than the previous week. There were 865 grain barges **unloaded in New Orleans**, 5 percent higher than the previous week.

Ocean

For the week ending January 31, 34 **ocean-going grain vessels** were loaded in the Gulf, 15 percent less than the same period last year. Fifty-two vessels are expected to be loaded within the next 10 days, 16 percent less than the same period last year.

For the week ending January 31, the ocean freight rate for shipping bulk grain, from the Gulf to Japan, was $39.00 per metric ton, 5 percent less than the previous week. The cost of shipping, from the PNW to Japan, was $22.00 per metric ton, 4 percent less than the previous week.

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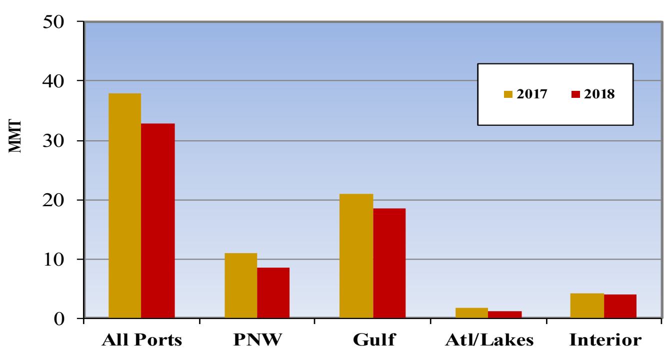
Feature Article/Calendar

Fourth Quarter Grain Inspections Below Last Year

According to the Grain Inspection, Packers, and Stockyards Administration (GIPSA), fourth quarter inspections of grain (wheat, corn, and soybeans) in 2018 shipped from major U.S. ports reached 32.8 million metric tons (mmt)(*see figure 1*). Total inspections of grain were 14 percent below the same quarter last year and 20 percent below the 5-year average. Grain inspections decreased in part due to a significant drop in inspections of soybeans. Soybean exports to China, normally the leading buyer of U.S. soybeans, reached only 8.2 mmt, compared to 32.1 mmt last year. Inspections of corn, however increased substantially from year-to-year, and wheat inspections increased slightly for the same period. Grain inspections decreased also due to lower shipments to Asia and Latin America. Transportation demand during the fourth quarter was strong as expected considering a large fall harvest.

U.S. Gulf grain inspections in the fourth quarter reached 18.6 mmt, down 11 percent from last year and 23 percent below the 5-year average, according to GIPSA (*see figure 1*). Inspections of corn increased notably from last year and were the highest since 2007. However, inspections of soybeans shipped from U.S. Gulf, dropped 36 percent because of a significant drop in shipments to China. Wheat inspections were up slightly during the quarter. During the fourth quarter, rail deliveries of grain to the U.S. Gulf decreased significantly from last year, but barge grain movements on the Mississippi River were up slightly from last year. Ocean freight rates, for shipping grain through the Gulf, were above the third and fourth quarters last year due in part to strong vessel activity.

Figure 1: Fourth Quarter Grain Inspections, by Port Region



Source: USDA/GIPSA

Pacific Northwest (PNW) grain inspections reached 8.6 mmt during the fourth quarter, 16 percent below last year and 22 percent below the 5-year average. Fourth quarter PNW corn inspections reached a record high as shipments to Asia rebounded. PNW soybean inspections dropped 83 percent for the same period. Wheat inspections in the PNW increased 30 percent, reaching 3.5 mmt as demand from Asia rebounded. Fourth quarter PNW ocean freight rates for shipping grain from the PNW were above the third and fourth quarters last year due to steady demand for grain and increased vessel activity.

Atlantic-Great Lakes grain inspections reached 1.2 mmt, down 31 percent from last year and 48 percent below the 5-year average. Corn and soybean inspections decreased from last year, but wheat inspections in the Atlantic-Great Lakes increased notably from last year; the highest since 2010.

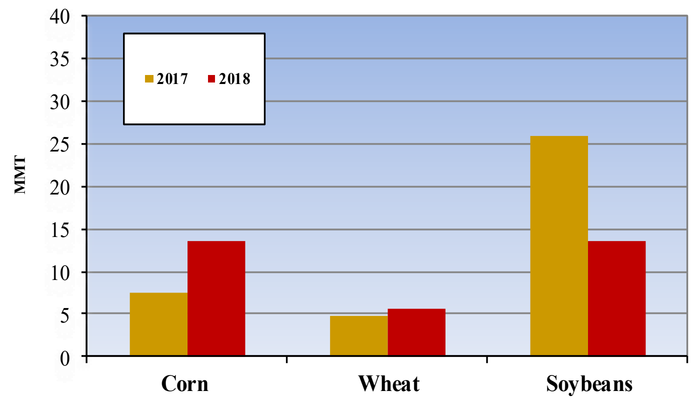
Interior grain inspections reached 4 mmt, down 2 percent from last year but 12 percent above the 5-year average. Fourth quarter interior wheat inspections increased 34 percent from last year, as shipments to Mexico increased notably. Interior inspections of corn and soybeans were down from last year.

Corn and Wheat Inspections Up, Soybeans Down

Total inspections of corn reached 13.5 mmt during the fourth quarter, up 82 percent from last year and 56 percent above the 5-year average (*see figure 2*). PNW corn inspections reached a record 3.88 mmt, up significantly from last year, due to increased demand from Asia. U.S. Gulf corn inspections reached 7.5 mmt, up 61 percent from last year and 29 percent above the 5-year average. Atlantic-Great Lakes corn inspections reached .035 mmt, down 7 percent from last year, and the lowest since 2012. Interior corn inspections were down 2 percent from last year. Total corn exports for the 2018/19 marketing year are projected to increase slightly from 2018/19, according to the December *World Agricultural Supply and Demand Estimates* (WASDE) report.

Fourth quarter soybean inspections were the lowest (13.6 mmt) since 2008, due primarily to tariffs imposed on Chinese buyers of U.S soybeans. Total soybean inspections were down 47 percent from last year (*see figure 2*). Inspections of soybeans to Asia dropped 85 percent, from last year, during the fourth quarter. U.S. Gulf soybean inspections dropped 36 percent from last year, to 9.5 mmt, and were 42 percent below average. PNW soybean inspections reached only 1.3 mmt, 83 percent below last year and the lowest since 2000. The Atlantic-Great Lakes soybean inspections totaled .579 mmt, down 62 percent from last year and 68 percent below the 5-year average. Interior soybean inspections reached 1.7 mmt, down 8 percent from last year and 4 percent above the 5-year average. According to USDA'S WASDE projections in December, soybean exports for the 2018/19 marketing year are expected to decrease 11 percent from last year.

Figure 2: Fourth Quarter Grain Inspections, by Types



Source: USDA/GIPSA

Fourth quarter wheat inspections reached 5.8 mmt, up 25 percent from last year and 10 percent above the 5-year average (*see figure 2*). Gulf wheat inspections reached 1.7 mmt, up 2 percent from the previous year. PNW wheat inspections reached 3.5 mmt, up 30 percent from last year and 37 percent above the 5-year average. Fourth quarter Atlantic-Great Lakes wheat inspections of .615 mmt increased 211 percent from last year. Interior wheat inspections of .397 mmt increased 34 percent for the same period. The December WASDE estimates report indicated total wheat exports for the 2018/19 marketing year are expected to increase 11 percent from the previous year. *Johnny.Hill@ams.usda.gov*

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators [1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit Train	Shuttle		Gulf	Pacific
02/06/19	199	278	230	250	174	156
01/30/19	199	287	217	257	183	163

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

Source: Transportation & Marketing Program/AMS/USDA

Table 2

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

Commodity	Origin--Destination	2/1/2019	1/25/2019
Corn	IL--Gulf	-0.76	-0.72
Corn	NE--Gulf	-0.85	-0.83
Soybean	IA--Gulf	-1.15	-1.15
HRW	KS--Gulf	-1.57	-1.52
HRS	ND--Portland	-1.75	-1.76

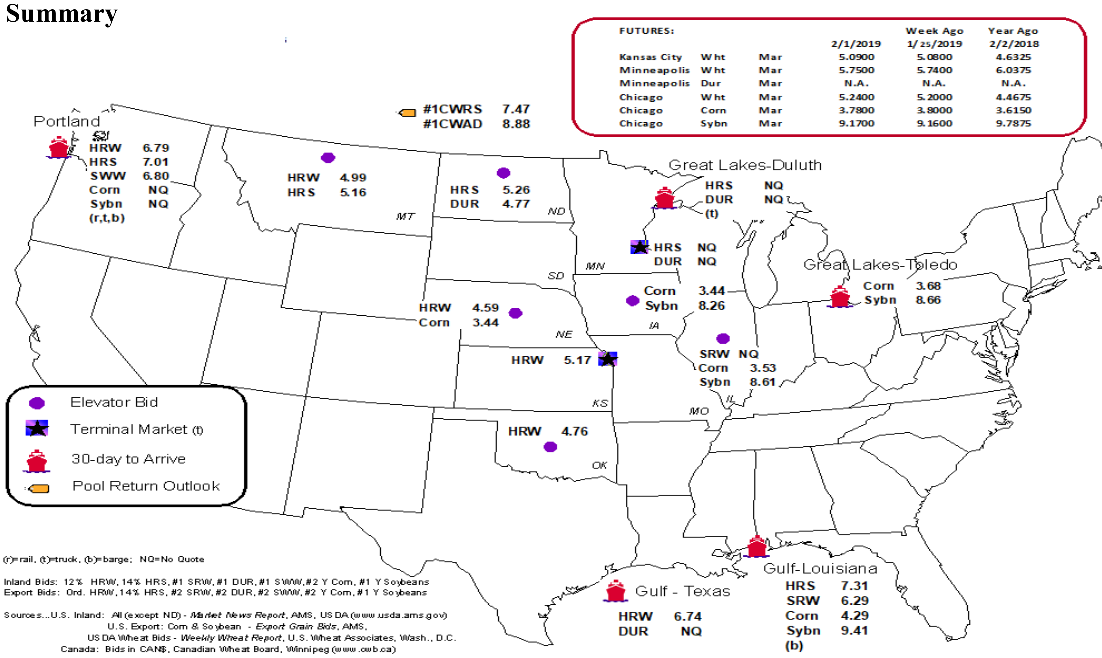
Note: nq = no quote; n/a = not available

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]
1/30/2019[p]	636	615	5,132	457	6,840	1/26/2019	2,207
1/23/2019[r]	531	605	6,083	582	7,690	1/19/2019	2,476
2019 YTD[r]	2,126	3,807	26,299	2,353	34,585	2019 YTD	10,847
2018 YTD[r]	3,035	7,631	30,942	1,146	42,754	2018 YTD	8,808
2019 YTD as % of 2018 YTD	70	50	85	205	81	% change YTD	123
Last 4 weeks as % of 2018[2]	75	46	79	196	77	Last 4wks % 2018	120
Last 4 weeks as % of 4-year avg.[2]	63	51	90	71	79	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.

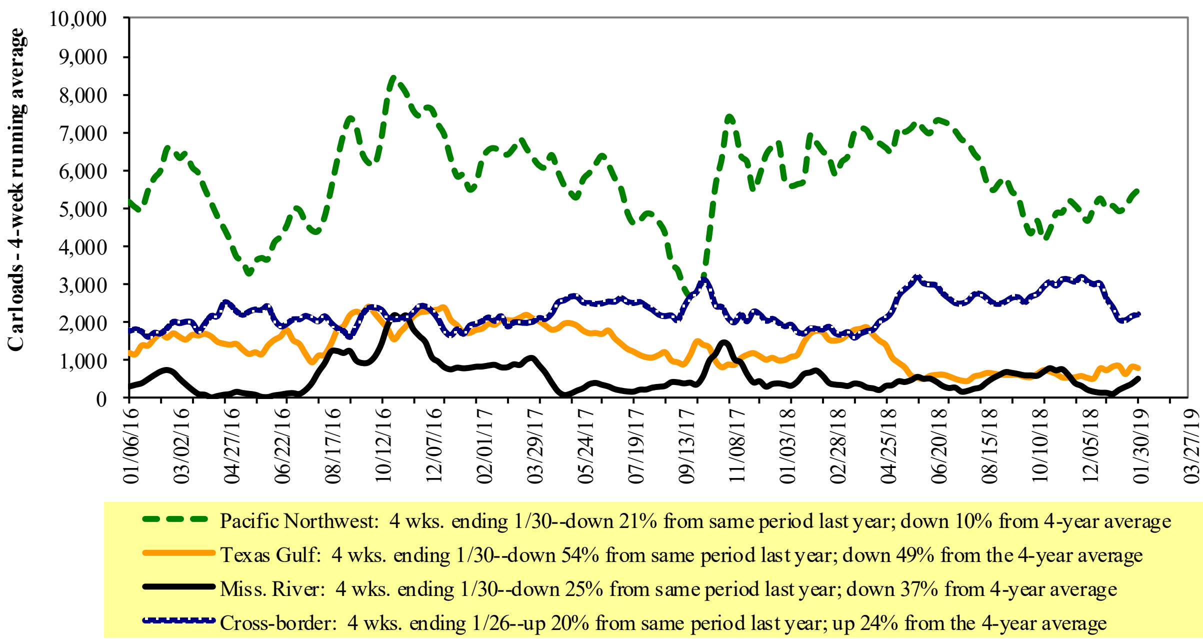
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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	
1/26/2019	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,399	2,208	11,386	1,027	5,415	21,435	3,718	4,202
This week last year	1,871	2,361	11,561	1,164	5,589	22,546	3,310	4,019
2019 YTD	7,510	11,202	45,442	4,213	21,169	89,536	14,991	17,232
2018 YTD	7,530	9,819	45,436	4,087	20,596	87,468	13,969	16,464
2019 YTD as % of 2018 YTD	100	114	100	103	103	102	107	105
Last 4 weeks as % of 2018*	100	114	100	103	103	102	107	105
Last 4 weeks as % of 3-yr avg.**	95	102	102	110	100	101	107	106
Total 2018	98,978	133,148	635,458	48,638	267,713	1,183,935	212,061	244,697

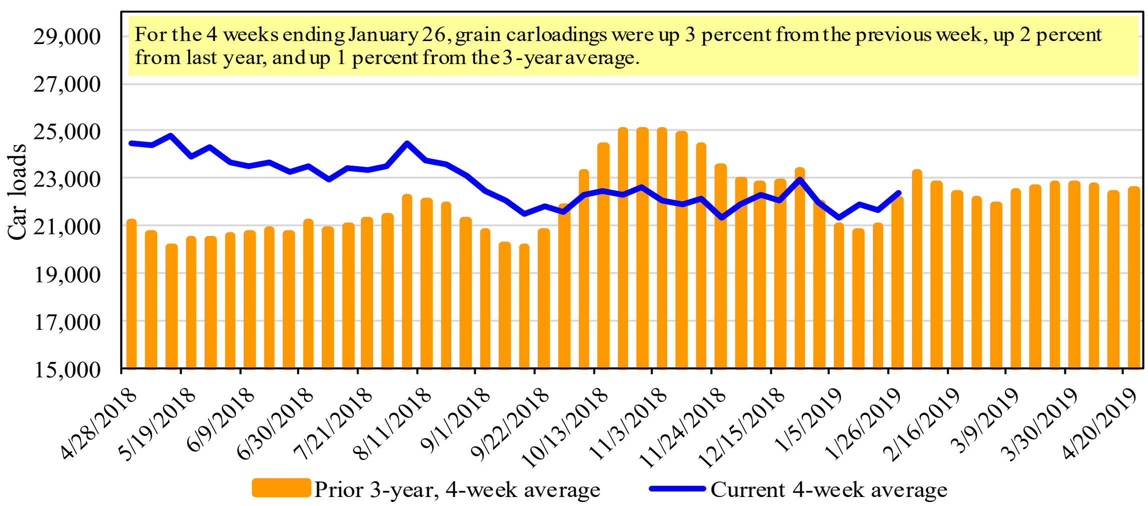
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 1/31/2019		Feb-19	Feb-18	Mar-19	Mar-18	Apr-19	Apr-18	May-19	May-18
		Delivery period							
BNSF[3]	COT grain units	no bids	0	0	no bids	no bids	no bids	no bids	no bids
	COT grain single-car[5]	0	0	0	0	0	0	0	0
UP[4]	GCAS/Region 1	no offer	10	no bid	no bids	no bid	no bids	n/a	n/a
	GCAS/Region 2	no offer	no bids	10	no bids	no bid	no bids	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.

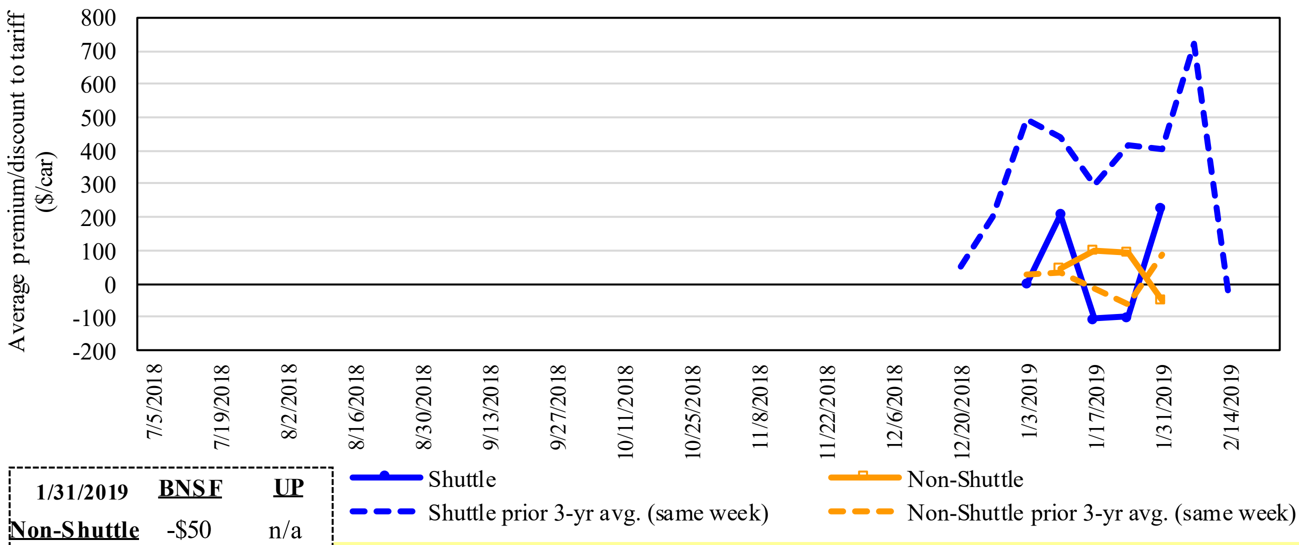
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

[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 February 2019, Secondary Market

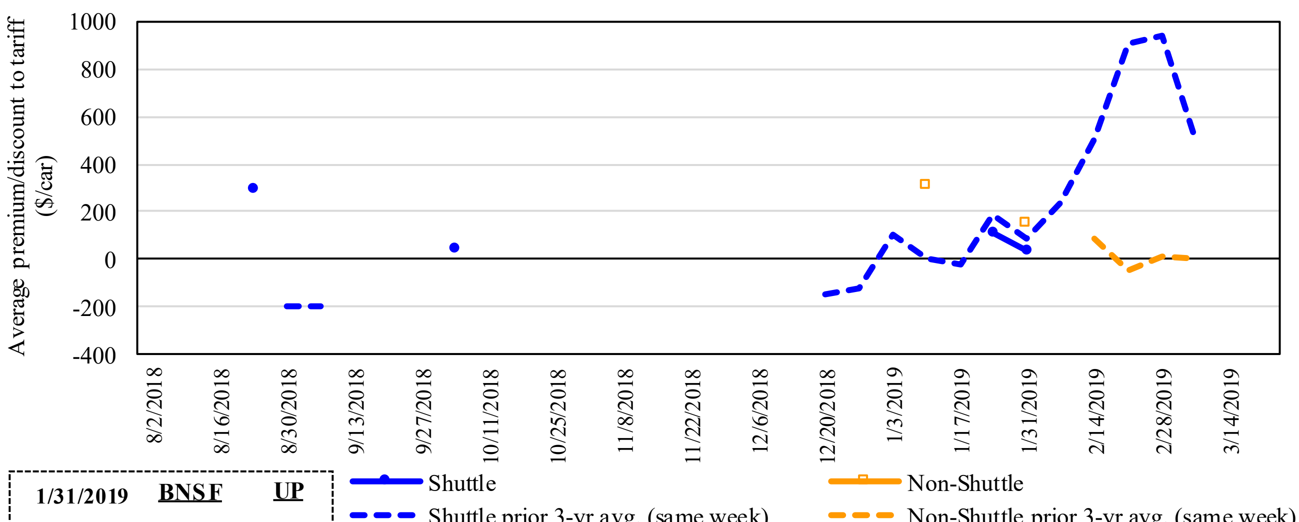


1/31/2019	BNSF	UP
Non-Shuttle	-$50	n/a
Shuttle	$428	$31

Average Non-shuttle bids/offers fell $142 this week, and are $150 below the peak.
Average Shuttle bids/offers rose $328 this week and are at 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 March 2019, Secondary Market



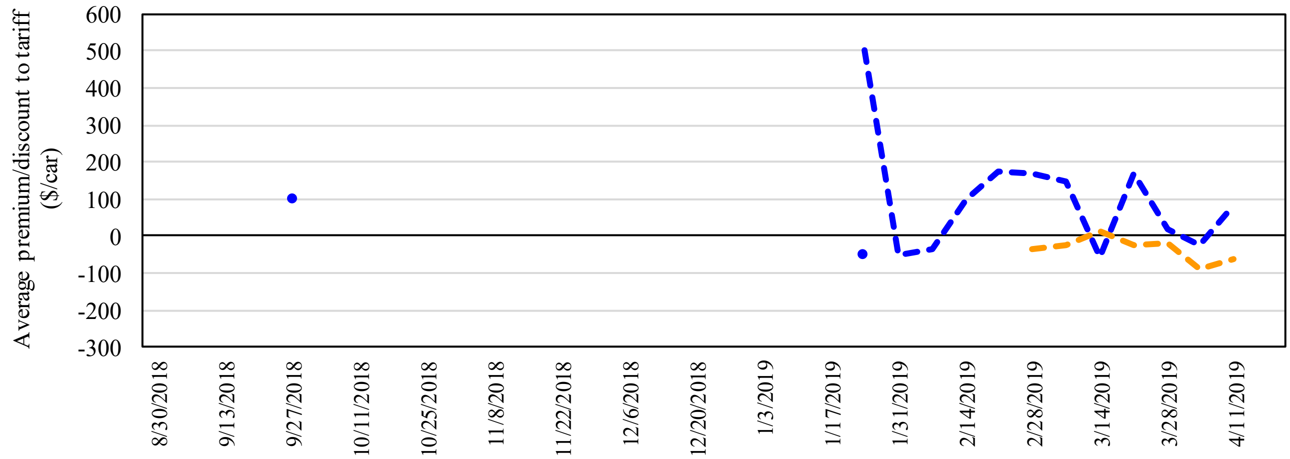
1/31/2019	BNSF	UP
Non-Shuttle	n/a	$150
Shuttle	$125	-$50

There were no Non-Shuttle bids/offers last week. Average Non-Shuttle bids/offers this week are $163 below the peak.
Average Shuttle bids/offers fell $75 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 6

Bids/Offers for Railcars to be Delivered in April 2019, Secondary Market



1/31/2019	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	n/a

Shuttle — Shuttle prior 3-yr avg. (same week) — Non-Shuttle — Non-Shuttle prior 3-yr avg. (same week)

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: 1/31/2019	Delivery period					
		Feb-19	Mar-19	Apr-19	May-19	Jun-19	Jul-19
Non-shuttle	**BNSF-GF**	**(50)**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(83)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	(38)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**n/a**	**150**	**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**	**428**	**125**	**n/a**	**n/a**	**n/a**	**(100)**
	Change from last week	345	12	n/a	n/a	n/a	n/a
	Change from same week 2018	197	8	n/a	n/a	n/a	n/a
	UP-Pool	**31**	**(50)**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	312	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	131	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 & 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]

February, 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	$106	$40.61	$1.11	3
	Grand Forks, ND	Duluth-Superior, MN	$4,268	$0	$42.38	$1.15	3
	Wichita, KS	Los Angeles, CA	$7,175	$0	$71.25	$1.94	2
	Wichita, KS	New Orleans, LA	$4,540	$187	$46.94	$1.28	1
	Sioux Falls, SD	Galveston-Houston, TX	$6,911	$0	$68.63	$1.87	2
	Northwest KS	Galveston-Houston, TX	$4,816	$205	$49.86	$1.36	1
	Amarillo, TX	Los Angeles, CA	$5,121	$285	$53.68	$1.46	3
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$211	$41.82	$1.06	3
	Toledo, OH	Raleigh, NC	$6,581	$0	$65.35	$1.66	4
	Des Moines, IA	Davenport, IA	$2,258	$45	$22.87	$0.58	0
	Indianapolis, IN	Atlanta, GA	$5,646	$0	$56.07	$1.42	4
	Indianapolis, IN	Knoxville, TN	$4,704	$0	$46.71	$1.19	4
	Des Moines, IA	Little Rock, AR	$3,609	$131	$37.14	$0.94	1
	Des Moines, IA	Los Angeles, CA	$5,327	$383	$56.70	$1.44	1
Soybeans	Minneapolis, MN	New Orleans, LA	$4,131	$208	$43.09	$1.17	15
	Toledo, OH	Huntsville, AL	$5,459	$0	$54.21	$1.48	3
	Indianapolis, IN	Raleigh, NC	$6,698	$0	$66.51	$1.81	4
	Indianapolis, IN	Huntsville, AL	$4,937	$0	$49.03	$1.33	4
	Champaign-Urbana, IL	New Orleans, LA	$4,745	$211	$49.22	$1.34	1
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$4,078	$0	$40.50	$1.10	3
	Wichita, KS	Galveston-Houston, TX	$4,296	$0	$42.66	$1.16	3
	Chicago, IL	Albany, NY	$5,896	$0	$58.55	$1.59	4
	Grand Forks, ND	Portland, OR	$5,736	$0	$56.96	$1.55	2
	Grand Forks, ND	Galveston-Houston, TX	$6,056	$0	$60.14	$1.64	2
	Northwest KS	Portland, OR	$5,912	$336	$62.04	$1.69	3
Corn	Minneapolis, MN	Portland, OR	$5,180	$0	$51.44	$1.31	4
	Sioux Falls, SD	Tacoma, WA	$5,140	$0	$51.04	$1.30	4
	Champaign-Urbana, IL	New Orleans, LA	$3,800	$211	$39.83	$1.01	3
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	5
	Des Moines, IA	Amarillo, TX	$4,060	$165	$41.96	$1.07	3
	Minneapolis, MN	Tacoma, WA	$5,180	$0	$51.44	$1.31	4
	Council Bluffs, IA	Stockton, CA	$5,000	$0	$49.65	$1.26	4
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,750	$0	$57.10	$1.55	3
	Minneapolis, MN	Portland, OR	$5,800	$0	$57.60	$1.57	3
	Fargo, ND	Tacoma, WA	$5,650	$0	$56.11	$1.53	3
	Council Bluffs, IA	New Orleans, LA	$4,775	$244	$49.84	$1.36	1
	Toledo, OH	Huntsville, AL	$4,634	$0	$46.02	$1.25	6
	Grand Island, NE	Portland, OR	$5,710	$344	$60.12	$1.64	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:	February, 2019			Fuel			Percent
	Origin		Tariff	surcharge	Tariff plus surcharge per:		change[4]
Commodity	**state**	**Destination region**	**rate/car[1]**	**per car[2]**	**metric ton[3]**	**bushel[3]**	**Y/Y**
Wheat	MT	Chihuahua, CI	$7,284	$0	$74.43	$2.02	-2
	OK	Cuautitlan, EM	$6,743	$146	$70.39	$1.91	2
	KS	Guadalajara, JA	$7,371	$403	$79.43	$2.16	3
	TX	Salinas Victoria, NL	$4,329	$89	$45.14	$1.23	1
Corn	IA	Guadalajara, JA	$8,528	$362	$90.83	$2.31	4
	SD	Celaya, GJ	$7,880	$0	$80.51	$2.04	2
	NE	Queretaro, QA	$8,207	$304	$86.96	$2.21	3
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	2
	MO	Tlalnepantla, EM	$7,573	$297	$80.41	$2.04	3
	SD	Torreon, CU	$7,480	$0	$76.43	$1.94	2
Soybeans	MO	Bojay (Tula), HG	$8,284	$335	$88.07	$2.39	3
	NE	Guadalajara, JA	$8,842	$363	$94.05	$2.56	3
	IA	El Castillo, JA	$9,110	$0	$93.08	$2.53	2
	KS	Torreon, CU	$7,714	$266	$81.53	$2.22	4
Sorghum	NE	Celaya, GJ	$7,527	$332	$80.30	$2.04	4
	KS	Queretaro, QA	$8,000	$183	$83.61	$2.12	3
	NE	Salinas Victoria, NL	$6,633	$147	$69.27	$1.76	3
	NE	Torreon, CU	$6,962	$253	$73.72	$1.87	3

[1]Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75--110 cars that meet railroad efficiency requirements.

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

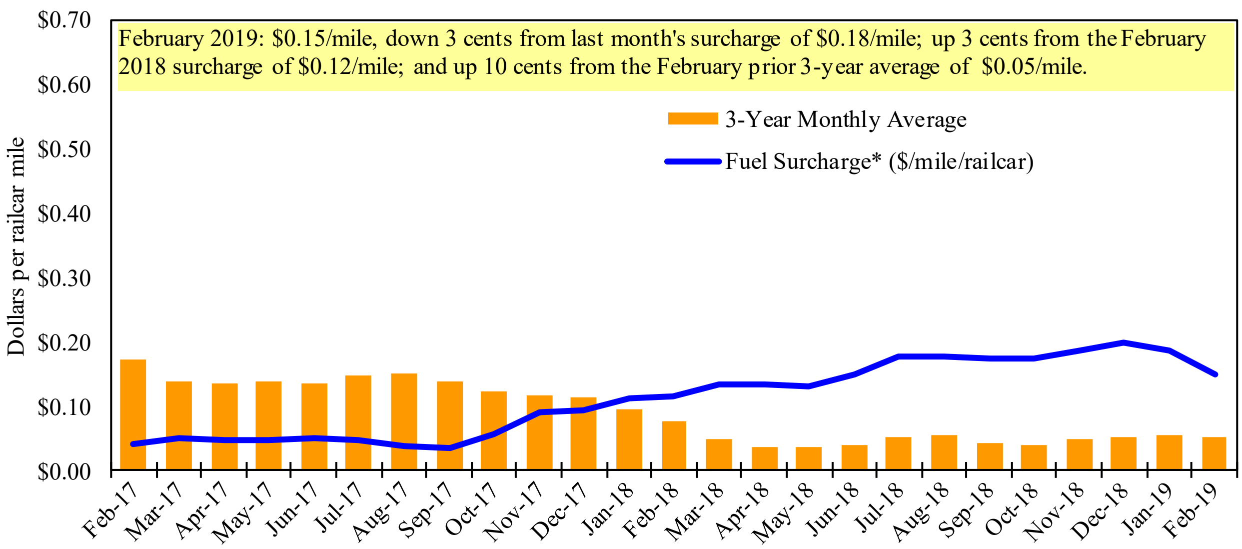
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average[1]

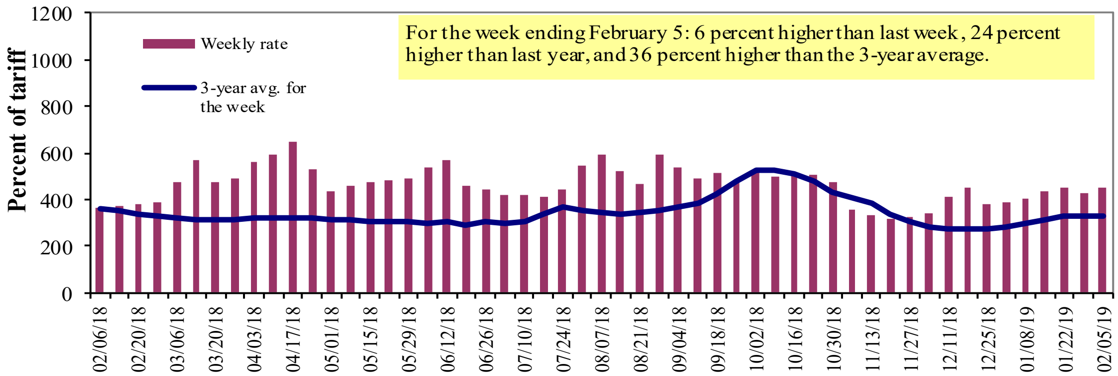


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.
Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

Barge Transportation

Figure 8

Illinois River Barge Freight Rate[1,2]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.

Source: Transportation & Marketing Program/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	2/5/2019	-	-	450	343	383	383	350
	1/29/2019	-	-	425	345	363	363	333
$/ton	2/5/2019	-	-	20.88	13.69	17.96	15.47	10.99
	1/29/2019	-	-	19.72	13.77	17.02	14.67	10.46
Current week % change from the same week:								
	Last year	-	-	24	23	13	13	63
	3-year avg. [2]	-	-	36	44	45	45	79
Rate[1]	March	-	438	408	305	345	345	293
	May	410	388	391	286	328	328	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

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.

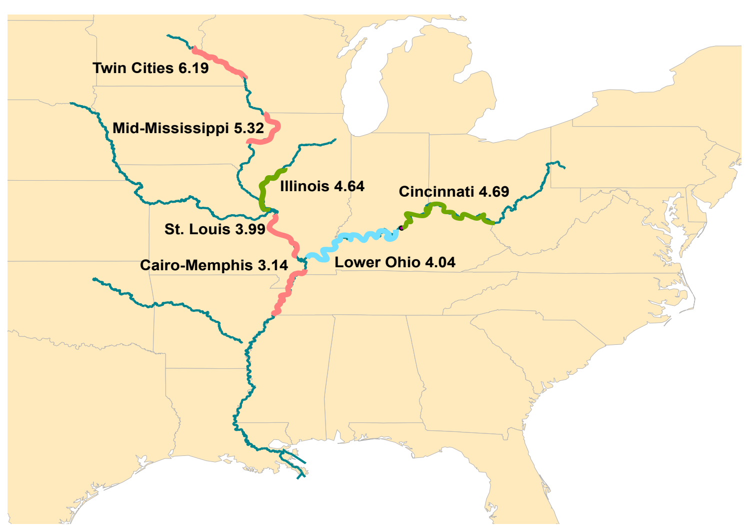
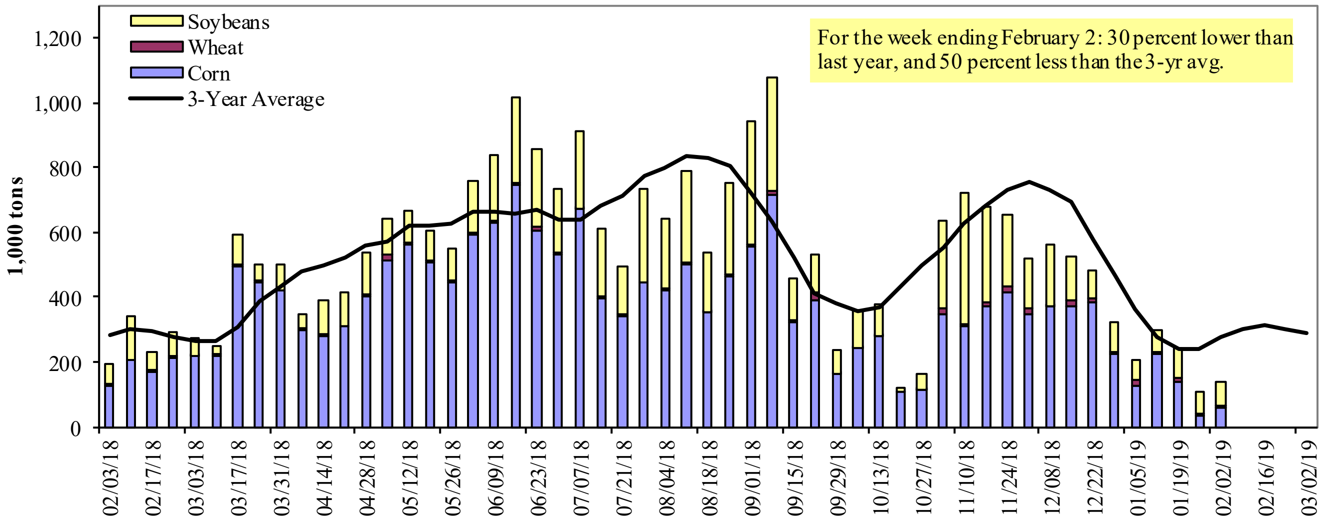


Figure 10

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 02/02/2019	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	0	4	4	0	7
Alton, IL (L26)	51	11	62	0	124
Granite City, IL (L27)	57	11	68	0	137
Illinois River (L8)	32	6	35	0	73
Ohio River (OLMSTED)	40	7	105	0	152
Arkansas River (L1)	0	21	46	0	67
Weekly total - 2019	97	40	219	0	355
Weekly total - 2018	260	48	351	5	664
2019 YTD[1]	1,047	188	1,085	7	2,327
2018 YTD[1]	815	110	1,255	9	2,188
2019 as % of 2018 YTD	128	171	87	80	106
Last 4 weeks as % of 2018[2]	117	158	83	80	99
Total 2018	23,349	1,674	12,819	133	37,975

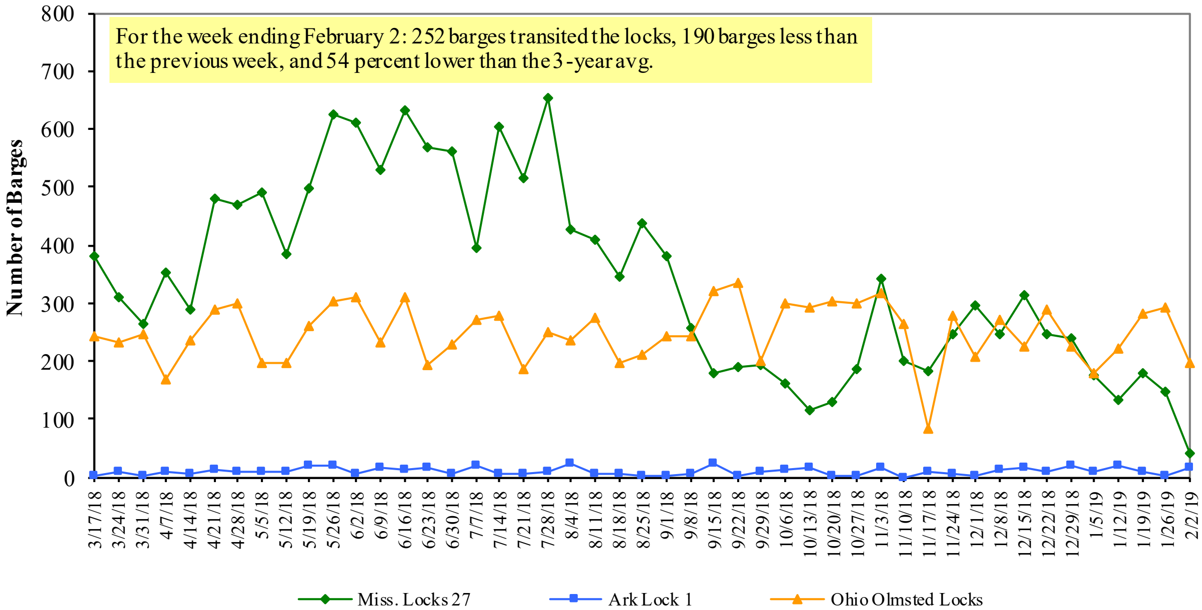
[1] Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/OLMSTED, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: 1. Total may not add exactly, due to rounding.
2. Starting from 11/24/2018, weekly movement through Ohio 52 is replaced by Olmsted.

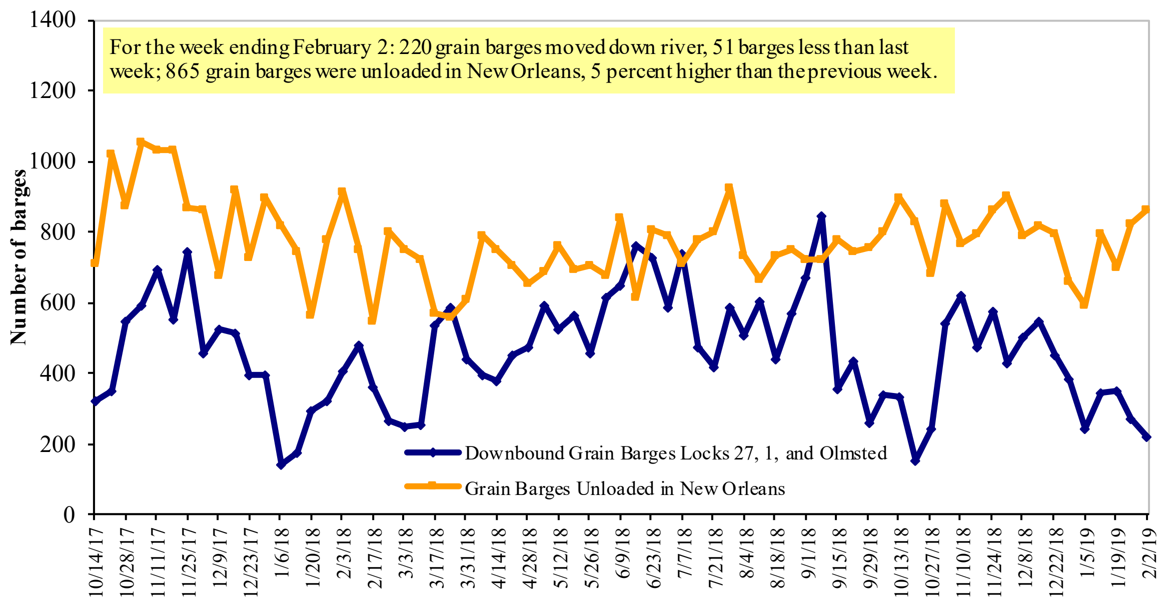
Source: U.S. Army Corps of Engineers

Figure 11
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



Source: U.S. Army Corps of Engineers

Figure 12
Grain Barges for Export in New Orleans Region



Source: U.S. Army Corps of Engineers and GIPSA

Truck Transportation

The **weekly diesel price** provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

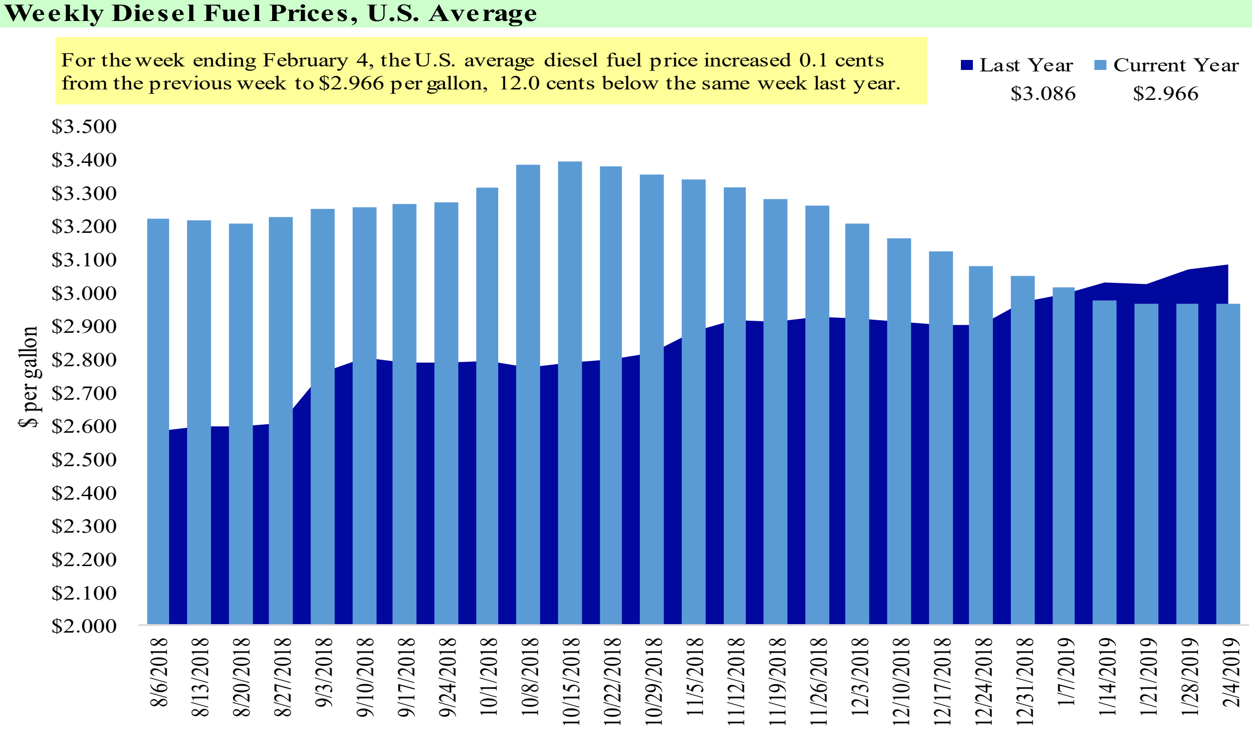
Table 11
Retail on-Highway Diesel Prices, Week Ending 2/4/2019 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.038	-0.012	-0.095
	New England	3.176	-0.012	-0.012
	Central Atlantic	3.227	-0.010	-0.097
	Lower Atlantic	2.879	-0.014	-0.109
II	Midwest	2.839	0.033	-0.205
III	Gulf Coast	2.779	-0.010	-0.095
IV	Rocky Mountain	2.883	-0.028	-0.098
V	West Coast	3.435	-0.013	-0.025
	West Coast less California	3.087	-0.012	-0.057
	California	3.711	-0.015	0.000
Total	U.S.	2.966	0.001	-0.120

[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]									
1/24/2019[3]	N/A*	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
This week year ago	2,033	695	1,420	916	88	5,152	18,441	10,302	33,895
Cumulative exports-marketing year[2]									
2018/19 YTD	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
2017/18 YTD	6,249	1,371	3,914	3,511	214	15,259	13,811	33,293	62,363
YTD 2018/19 as % of 2017/18[3]	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Last 4 wks as % of same period 2017/18[3]	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
2017/18 Total	9,150	2,343	5,689	4,854	384	22,419	57,209	56,214	135,842
2016/17 Total	11,096	2,285	7,923	4,254	484	26,042	41,864	51,156	119,062

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

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

(*) Please note tha "N/A" notates that the data for this table is not current for this week due to the federal shutdown in December

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 1/24/2019	Total Commitments[2] 2018/19 Current MY	2017/18 Last MY	% change current MY from last MY	Exports[3] 3-year avg 2015-2017
	- 1,000 mt -			
Mexico	n/a*	10,254	n/a	13,691
Japan	n/a	5,348	n/a	11,247
Korea	n/a	1,624	n/a	4,754
Colombia	n/a	2,370	n/a	4,678
Peru	n/a	1,851	n/a	2,975
Top 5 Importers	n/a	**21,447**	n/a	**37,344**
Total US corn export sales	**n/a**	**32,252**	**n/a**	**53,184**
% of Projected	n/a	66%		
Change from prior week[2]	**n/a**	**1,851**		
Top 5 importers' share of U.S. corn export sales	n/a	66%		70%
USDA forecast, January 2019	**n/a**	**48,982**	**n/a**	
Corn Use for Ethanol USDA forecast, January 2019	**n/a**	**140,335**	**n/a**	

(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

*n/a indicates a missing value due to the recent partial federal government shutdown

Table 14

Top 5 Importers[1] of U.S. Soybeans

For the week ending 1/24/2019	Total Commitments[2] 2018/19 Current MY	2017/18 Last MY	% change current MY from last MY	Exports[3] 3-yr avg. 2015-2017
	- 1,000 mt -			- 1,000 mt -
China	n/a*	26,241	n/a	31,228
Mexico	n/a	2,463	n/a	3,716
Indonesia	n/a	1,114	n/a	2,250
Japan	n/a	1,375	n/a	2,145
Netherlands	n/a	832	n/a	2,209
Top 5 importers	n/a	**32,025**	**n/a**	**41,549**
Total US soybean export sales	**n/a**	**43,595**	**n/a**	**55,113**
% of Projected	n/a	74%		
Change from prior week[2]	**n/a**	**359**		
Top 5 importers' share of U.S. soybean export sales	n/a	73%		**75%**
USDA forecast, January, 2019	**n/a**	**58,856**	**n/a**	

(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)

*n/a indicates a missing value due to the recent partial federal government shutdown

Table 15

Top 10 Importers[1] of All U.S. Wheat

For the week ending 1/24/2019	Total Commitments[2] 2018/19 Current MY	2017/18 Last MY	% change current MY from last MY	Exports[3] 3-yr avg 2015-2017
	- 1,000 mt -			- 1,000 mt -
Mexico	n/a*	2,495	n/a	2,781
Japan	n/a	2,376	n/a	2,649
Philippines	n/a	2,258	n/a	2,441
Korea	n/a	1,316	n/a	1,257
Nigeria	n/a	1,016	n/a	1,254
Indonesia	n/a	1,005	n/a	1,076
Taiwan	n/a	929	n/a	1,066
China	n/a	847	n/a	944
Colombia	n/a	519	n/a	714
Thailand	n/a	630	n/a	618
Top 10 importers	**n/a**	**13,391**	n/a	**14,800**
Total US wheat export sales	**n/a**	**20,411**	**n/a**	**22,869**
% of Projected	n/a	77%		
Change from prior week[2]	**n/a**	**289**		
Top 10 importers' share of U.S. wheat export sales	n/a	66%		65%
USDA forecast, January 2019	**n/a**	**26,567**	**n/a**	

(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.

* n/a indicates a missing value due to the recent partial federal government shutdown

Table 16

Grain Inspections for Export by U.S. Port Region (1,000 metric tons)

Port Regions	For the Week Ending 01/31/19	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	159	204	78	949	1,066	89	87	101	13,315
Corn	257	258	100	1,139	1,116	102	109	163	20,024
Soybeans	230	247	93	978	1,741	56	55	56	7,719
Total	**646**	**710**	**91**	**3,065**	**3,923**	**78**	**80**	**94**	**41,058**
Mississippi Gulf									
Wheat	228	92	247	544	354	154	188	210	3,896
Corn	530	575	92	2,346	2,098	112	125	111	33,735
Soybeans	580	615	94	2,904	3,639	80	89	84	28,124
Total	**1,338**	**1,282**	**104**	**5,794**	**6,092**	**95**	**107**	**99**	**65,755**
Texas Gulf									
Wheat	39	65	60	331	464	71	74	99	3,198
Corn	0	0	n/a	33	31	106	106	55	730
Soybeans	0	0	n/a	0	0	n/a	n/a	0	69
Total	**39**	**65**	**60**	**364**	**496**	**73**	**76**	**87**	**3,997**
Interior									
Wheat	27	25	106	167	133	125	118	126	1,614
Corn	91	118	77	579	645	90	99	105	8,650
Soybeans	135	120	113	517	498	104	110	118	6,729
Total	**253**	**264**	**96**	**1,263**	**1,275**	**99**	**106**	**112**	**16,993**
Great Lakes									
Wheat	10	0	n/a	21	19	111	111	332	894
Corn	0	0	n/a	0	0	n/a	n/a	n/a	404
Soybeans	0	0	n/a	22	0	n/a	n/a	n/a	1,192
Total	**10**	**0**	**n/a**	**44**	**19**	**226**	**226**	**679**	**2,491**
Atlantic									
Wheat	0	0	n/a	0	0	n/a	n/a	0	69
Corn	7	0	n/a	21	0	n/a	n/a	n/a	138
Soybeans	82	11	741	190	166	114	116	67	2,047
Total	**89**	**11**	**805**	**211**	**166**	**127**	**125**	**67**	**2,253**
U.S. total from ports*									
Wheat	463	387	120	2,013	2,037	99	101	119	22,986
Corn	885	951	93	4,118	3,890	106	116	120	63,682
Soybeans	1,027	993	103	4,611	6,044	76	82	78	45,879
Total	**2,375**	**2,331**	**102**	**10,741**	**11,971**	**90**	**96**	**98**	**132,547**

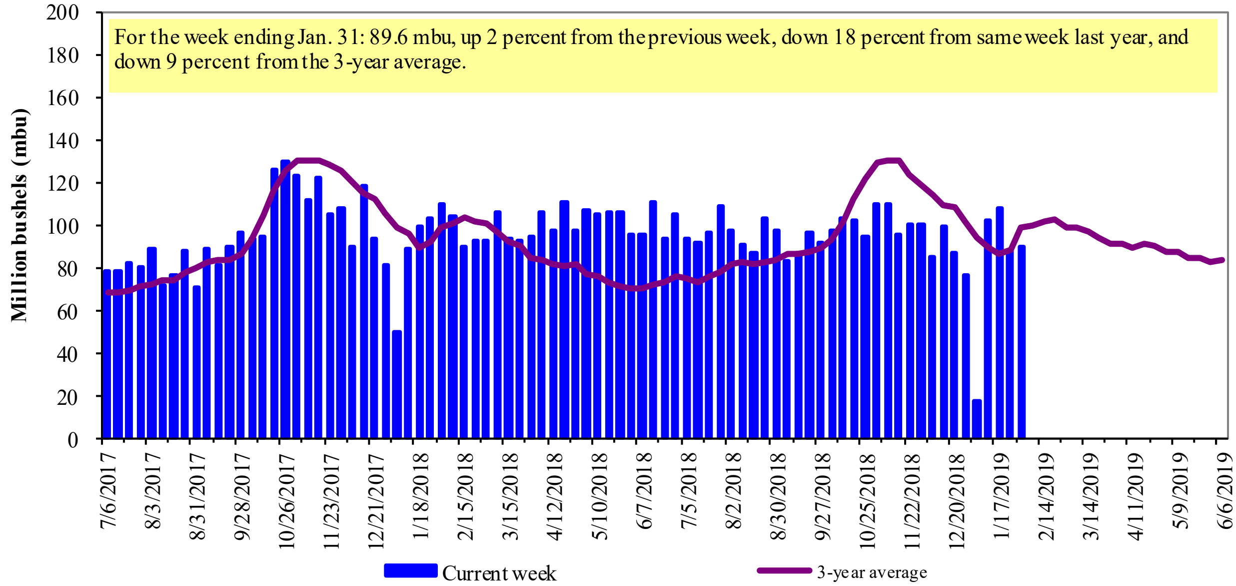
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); YTD= year-to-date; n/a = not applicable

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 50 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2017.

Figure 14

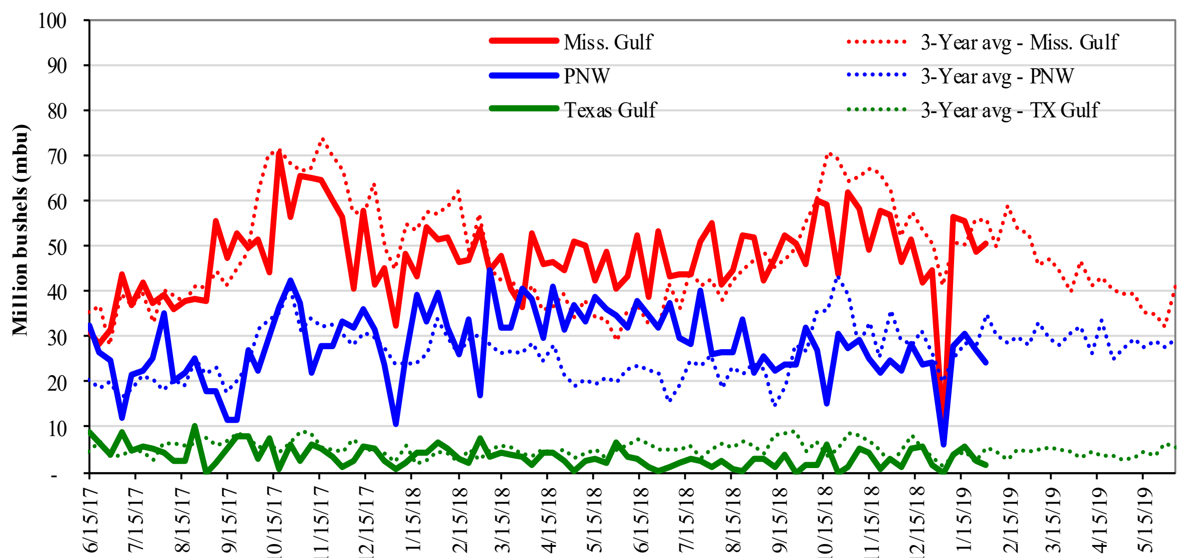
U.S. grain inspected for export (wheat, corn, and soybeans)



Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)
Note: 3-year average consists of 4-week running average

Figure 15

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



Week ending 01/31/19 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Mississippi Gulf:	50.6	Last Week:	up 4	down 40	up 2	down 9
PNW:	24.4	Last Year (same week):	down 2	down 79	down 11	down 38
Texas Gulf:	1.4	3-yr avg. (4-wk. mov. Avg):	down 5	down 63	down 9	down 16

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

Ocean Transportation

Table 17

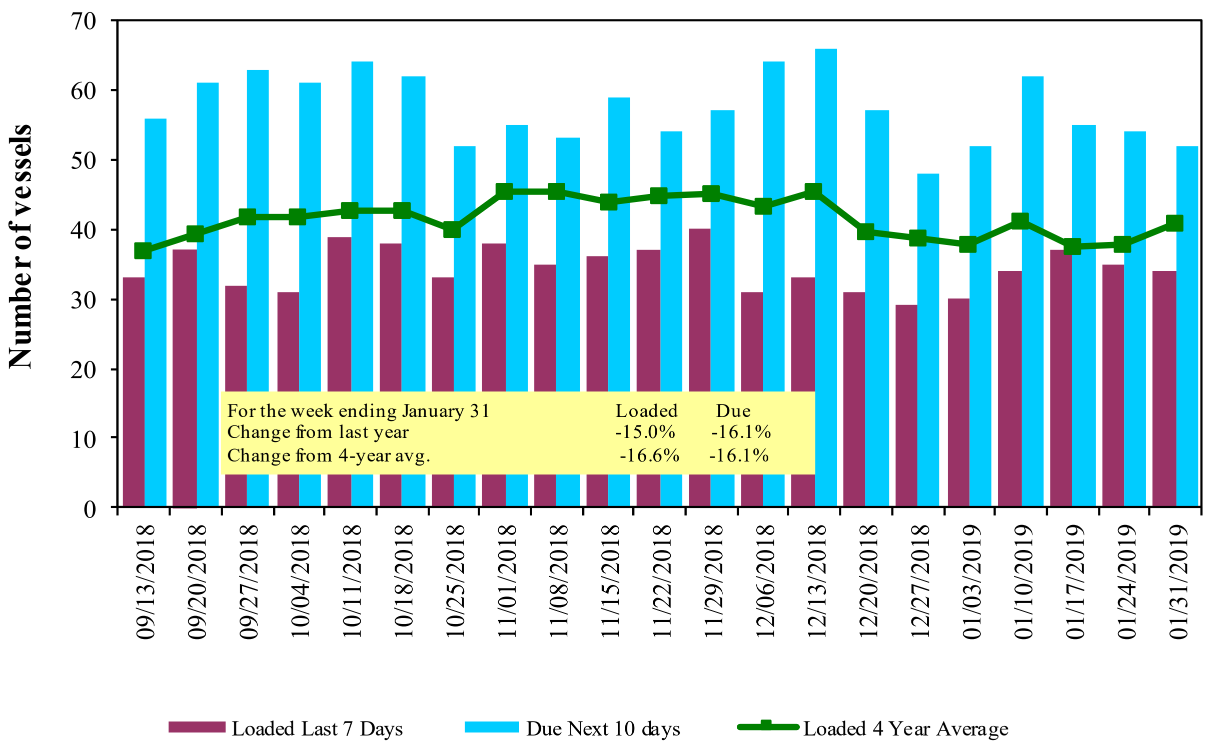
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
1/31/2019	49	34	52	17
1/24/2019	44	35	54	8
2018 range	(23..88)	(24..41)	(38..67)	(4..30)
2018 avg.	40	34	54	17

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

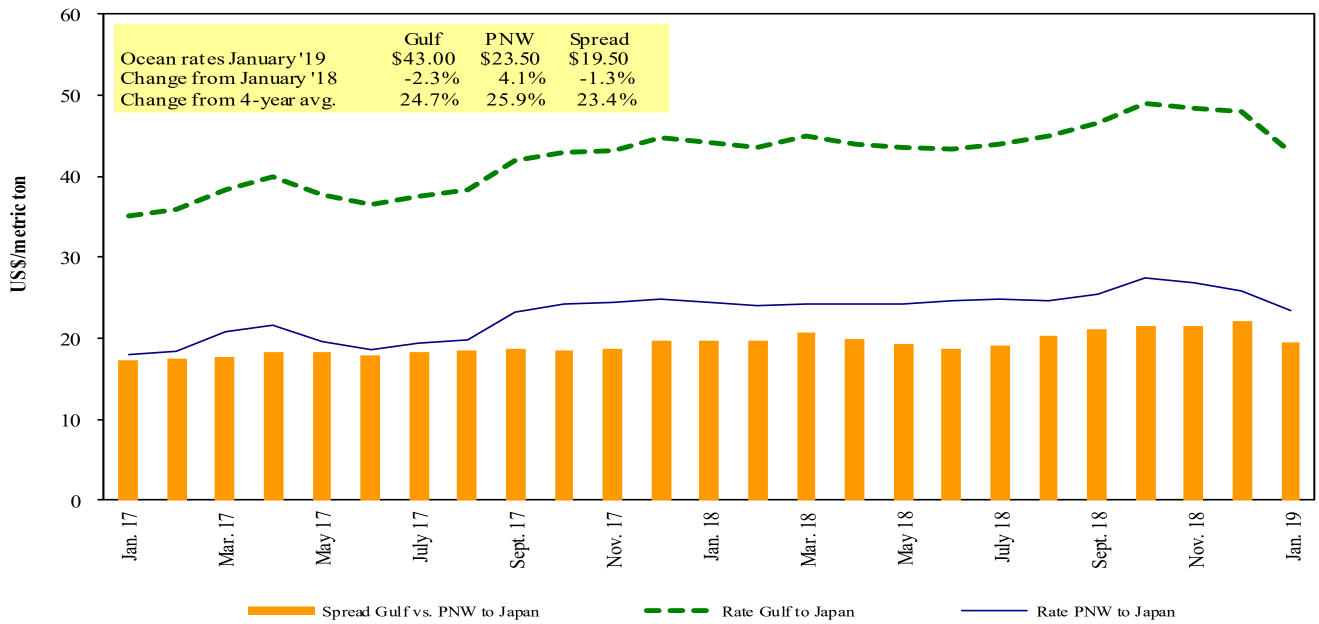
U.S. Gulf Vessel Loading Activity



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 02/02/2019

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Djibouti	Wheat	Dec 27/Jan 7	9,800	113.11*
U.S. Gulf	Pt. Sudan	Sorghum	Dec 7/17	30,430	71.88*
U.S. Gulf	Djibouti	Wheat	Nov 2/12	21,470	85.44*
PNW	Taiwan	Heavy Grain	Sep 15/Oct 31	63,000	25.00
Brazil	China	Heavy Grain	Feb 20/25	65,000	26.00
Brazil	China	Heavy Grain	Jan 22/30	60,000	29.50
Brazil	China	Heavy Grain	Dec 15/20	60,000	37.50
Brazil	China	Heavy Grain	Dec 1/10	60,000	36.25
Brazil	China	Heavy Grain	Nov 20/30	60,000	38.00
Brazil	China	Heavy Grain	Nov 1/10	60,000	34.00
Brazil	S.Korea	Heavy Grain	Nov 5/10	66,000	43.00

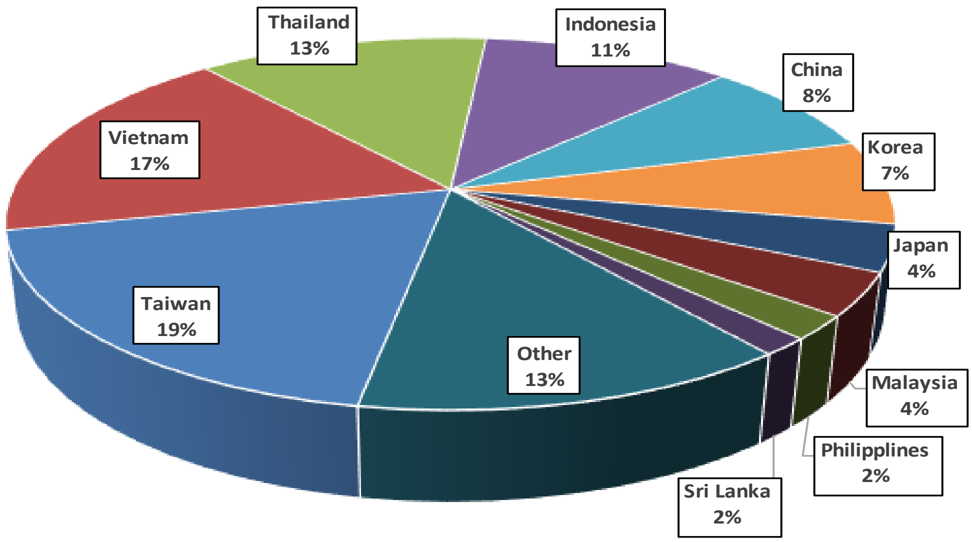
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option

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

Source: Maritime Research Inc. (www.maritime-research.com)

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

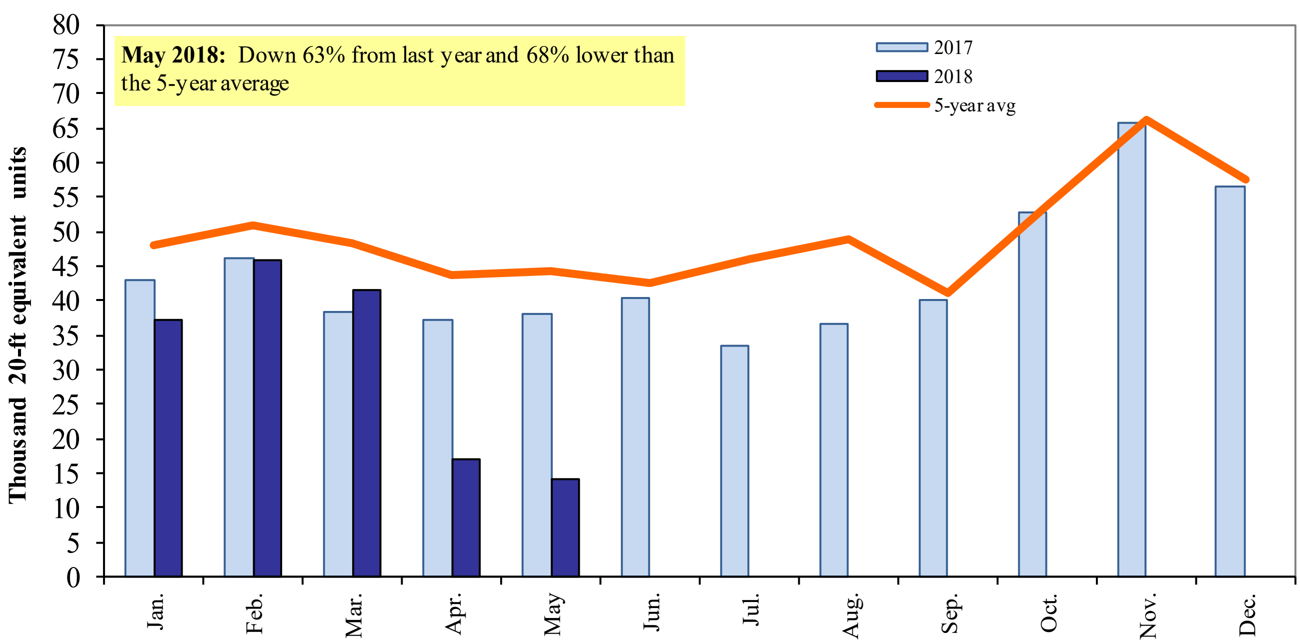
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-May 2018



Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

Figure 19
Monthly Shipments of Containerized Grain to Asia



Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data.

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 110220, 110290, 120100, 120810, 230210, 230310, 230330, and 230990.

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