

Grain Truck and Ocean Rate Advisory: Quarterly Updates

Transportation and Marketing Programs
Transportation Services Division
www.ams.usda.gov/AgTransportation

Truck Advisory

Table 1: U.S. grain truck market, 3rd quarter 2019

	25 miles	100 miles	200 miles	Truck availability	Truck use	Future truck use					
							¹ Rate per mile, per truckload			Quarterly Index	
							1 = Very easy to 5 = Very difficult	1 = Much lower to 5 = Much higher			
National average²	4.37	2.91	2.82	2.92	3.45	2.92					
North Central	4.71	2.29	2.22	3.00	3.57	2.33					
Rocky Mountain	NA ³	NA	NA	NA	NA	NA					
South Central	3.95	3.33	3.10	2.67	3.50	2.33					
West	3.84	3.20	3.14	3.00	3.00	3.50					
East	NA	NA	NA	NA	NA	NA					

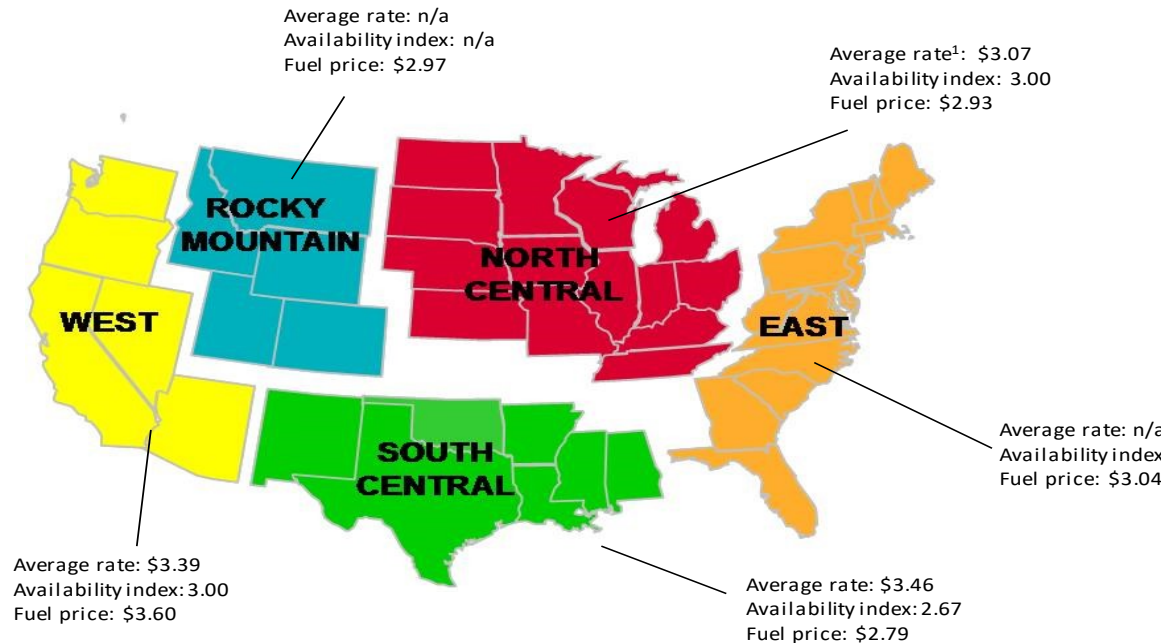
¹Rates are based on trucks with 80,000-lb gross vehicle weight limit, and are quoted in U.S. dollars.

²National average is based on rates received from various States, but not every State is represented.

Note: NA = not available because of low or no response rate.

Source: USDA, Agricultural Marketing Service.

Figure 1: U.S. grain truck market, 3rd quarter 2019



¹Average rate per loaded mile, based on truck rates for trips of 25, 100, and 200 miles.

Note: Fuel prices are a quarterly average (unit per gallon).

Source: Fuel price data are from U.S. Department of Energy, Energy Information Administration, and availability index data are from USDA, Agricultural Marketing Service.

Truck Use

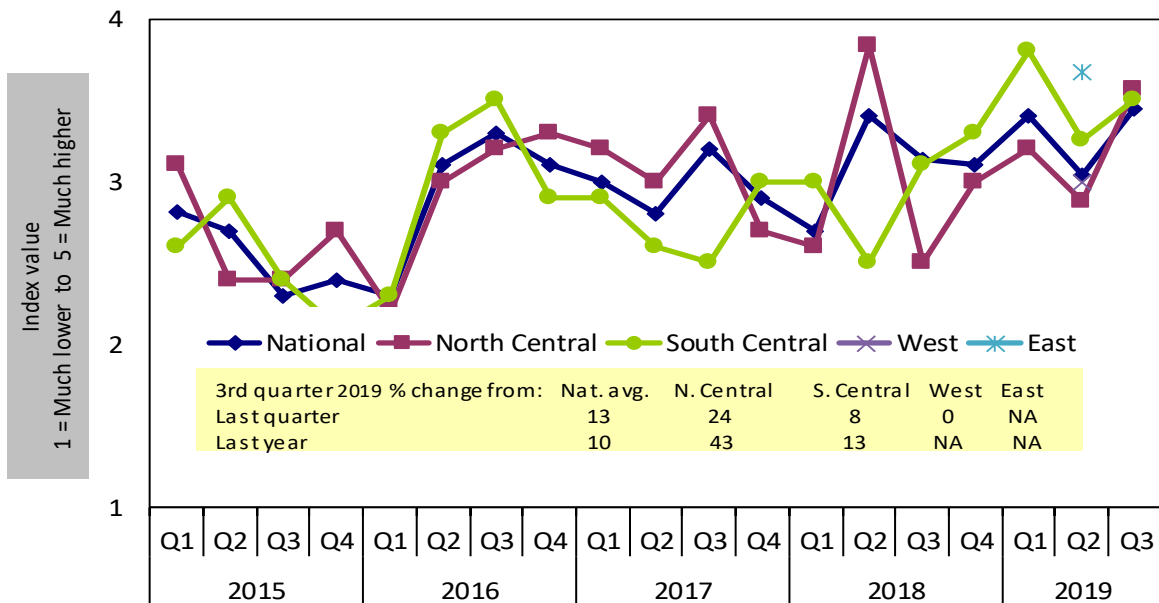
Table 2: Regional truck use Index

Current Truck Use 1 = Much lower to 5 = Much higher					Future Truck Use 1 = Much lower to 5 = Much higher			
2017	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.
National	3.00	3.00	3.20	2.90	3.00	2.60	3.40	3.30
North Central	3.20	3.00	3.40	2.70	3.20	2.80	3.40	3.20
Rocky Mountain	NA	NA	NA	NA	NA	NA	NA	NA
South Central	2.90	2.70	2.50	3.00	2.80	2.50	3.00	3.40
West	NA	NA	NA	NA	NA	NA	NA	NA
2018	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.
National	2.70	3.40	3.14	3.10	3.00	3.60	3.60	3.10
North Central	2.60	3.83	2.50	3.00	3.10	4.00	3.00	3.10
Rocky Mountain	NA	NA	NA	NA	NA	NA	NA	NA
South Central	3.00	2.50	3.10	3.30	2.50	2.50	3.50	3.00
West	NA	NA	NA	NA	NA	NA	NA	NA
2019	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.
National	3.40	3.04	3.45		3.60	3.41	2.92	
North Central	3.20	2.88	3.57		3.30	3.53	2.33	
Rocky Mountain	NA	NA	NA		NA	NA	NA	
South Central	3.80	3.25	3.50		4.00	3.50	2.33	
West	NA	3.00	3.00		NA	3.50	3.50	
East	NA	3.67	NA		NA	2.67	NA	

Note: NA = not available; qtr. = quarter.

Source: USDA, Agricultural Marketing Service.

Figure 2: National truck usage, 3rd quarter 2019



Note: Q = quarter; avg. = average; Nat. = national; N. = north; S. = south; NA = not available.

Source: USDA, Agricultural Marketing Service.

Truck Availability

Table 3: Quarterly national truck availability index

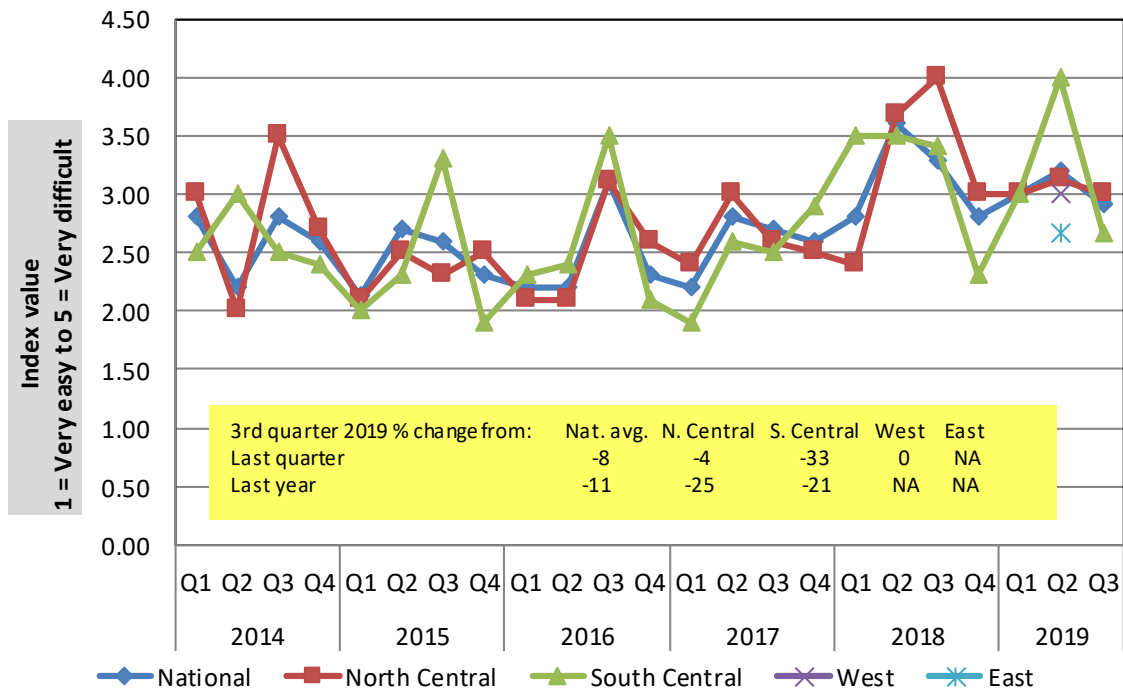
Region	1= Very easy	5=Very difficult		Current quarter as % change from	
	3rd quarter 2019	Previous quarter	Same quarter last year	Previous quarter	Same quarter last year
National	2.92	3.19	3.28	-8	-11
North Central	3.00	3.12	4.00	-4	-25
South Central	2.67	4.00	3.40	-33	-21
West	3.00	3.00	NA	NA	NA
East	n/a	NA	NA	NA	NA

Note: NA = not available.

Source: USDA, Agricultural Marketing Service.

The truck availability index tracks the trends in perceived ease of hiring a truck as reported by grain elevators.

Figure 3: National truck availability



Note: NA = not available; Q = quarter; N. = north; S. = south; Nat. = national; avg. = average.

Source: USDA, Agricultural Marketing Service.

Truck Rates

Table 4 : Average grain truck rates for short and long hauls, 3rd quarter 2019 (\$/mile per truckload)

Region	25 miles	100 miles	200 miles	% increase from:					
				Last qtr.			Same qtr. last year		
				25 mi	100 mi	200 mi	25 mi	100 mi	200 mi
National average	\$4.37	\$2.91	\$2.82	4.0%	3.9%	10.2%	-8.8%	-0.7%	-2.8%
North Central	\$4.71	\$2.29	\$2.22	7.8%	-16.4%	-15.6%	-7.8%	-12.9%	-14.6%
Rocky Mountain	NA	NA	NA	-	-	-	-	-	-
South Central	\$3.95	\$3.33	\$3.10	11.0%	29.1%	53.5%	7.0%	-6.5%	-7.5%
West	\$3.84	\$3.20	\$3.14	-2.0%	-10.1%	6.8%	-	-	-
East	NA	NA	NA	-	-	-	-	-	-

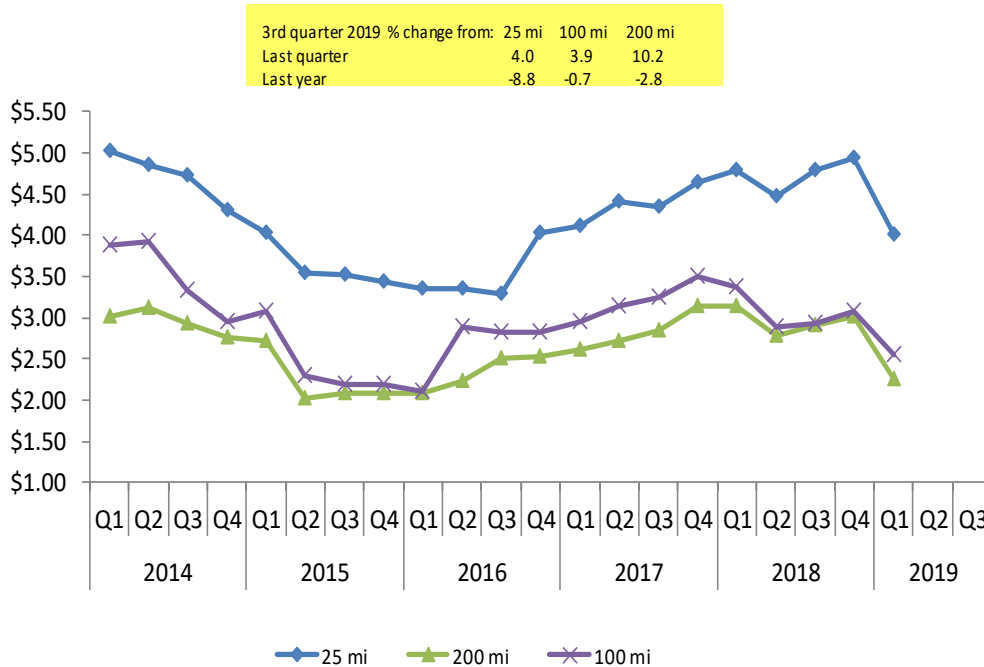
Note: NA = not available; qtr. = quarter.

Rates are based on trucks with 80,000-lb gross vehicle weight limit.

Source: USDA, Agricultural Marketing Service.

A truck is assumed to carry 55,000 lbs or 25 metric tons of grain. Rates per metric ton per mile can be calculated from rates per truckload.

Figure 4: National average truck rates by trip distance



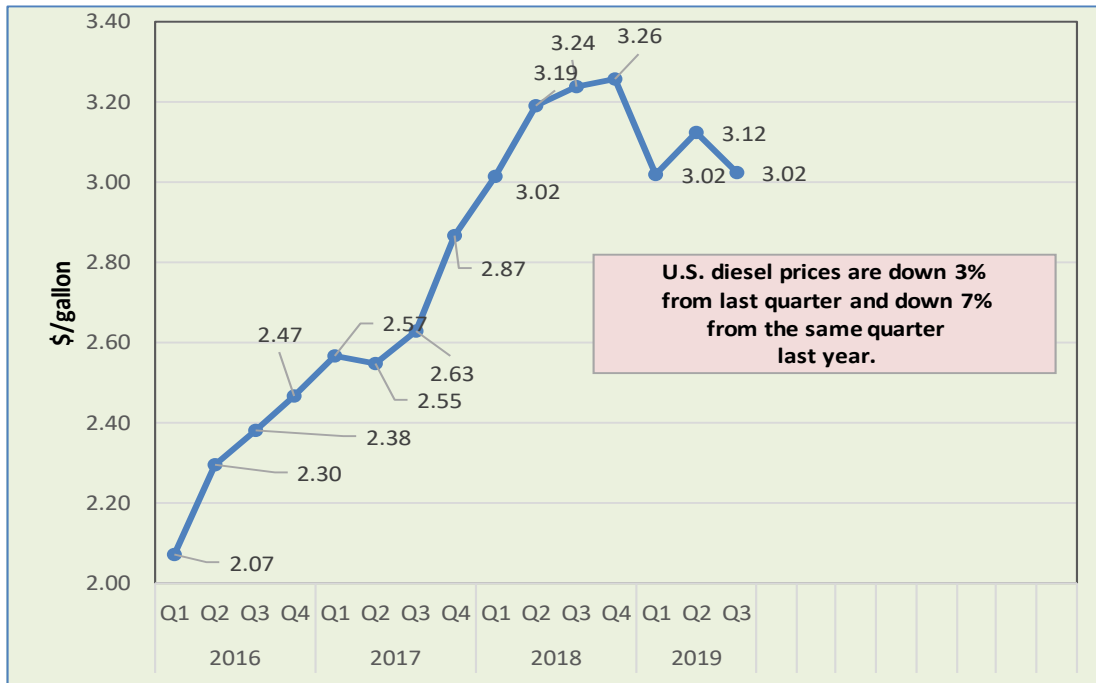
Note: Q= quarter.

Source: USDA, Agricultural Marketing Service.

U.S. Diesel Fuel Prices

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

Figure 5: U.S. average on-highway diesel fuel prices



Note: Q = quarter.

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

Table 5: 3rd quarter 2019 average diesel fuel prices (all types - \$/gallon)

Location	Price	Change from	
		Last qtr.	Same qtr. last year
East Coast	3.04	-0.11	-0.19
New England	3.08	-0.13	-0.19
Central Atlantic	3.23	-0.11	-0.17
Lower Atlantic	2.92	-0.10	-0.19
Midwest	2.93	-0.09	-0.24
Gulf Coast	2.79	-0.10	-0.23
Rocky Mountain	2.97	-0.15	-0.39
West Coast	3.60	-0.10	-0.14
California	3.93	-0.10	-0.03
U.S.	3.02	-0.10	-0.21

Note: qtr. = quarter

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

Ocean Rates

Table 6: Ocean shipping rates for bulk grain (\$/metric ton)

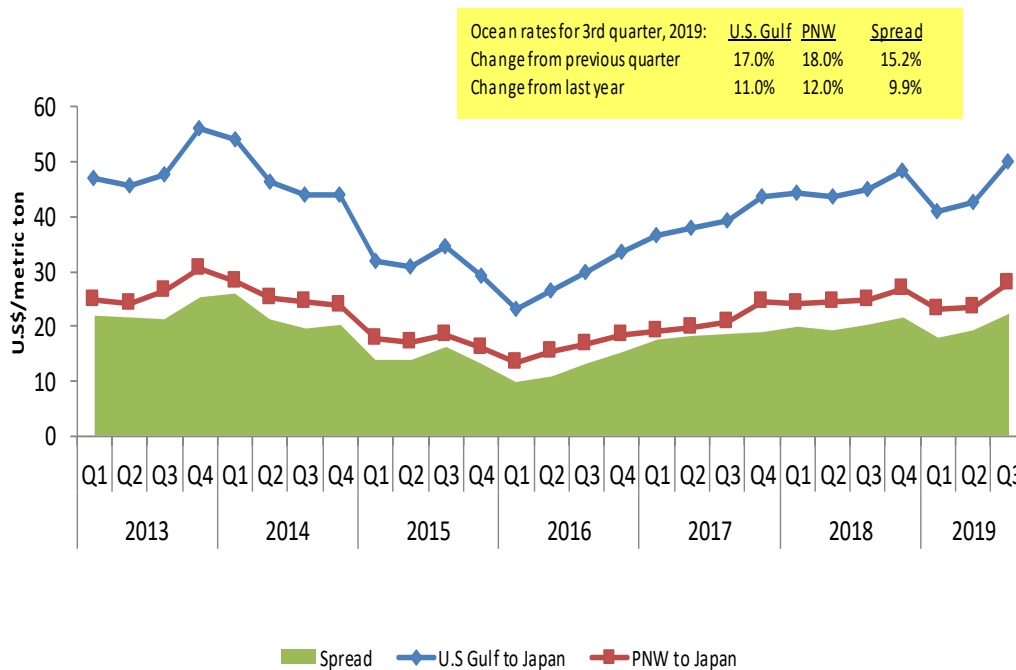
Country	U.S. Gulf to					PNW to				
	1st qtr. 2018	2nd qtr. 2018	3rd qtr. 2018	4th qtr. 2018	Average	1st qtr. 2019	2nd qtr. 2019	3rd qtr. 2019	4th qtr. 2019	Average
Japan	44.27	43.68	45.13	48.46	45.39	40.85	42.78	50.05		44.56
Rotterdam	16.82	20.67	21.06	20.83	19.85	16.73	16.62	20.21		17.85
China	43.41	42.69	44.05	47.52	44.42	39.61	42.20	49.35		43.72
Mexico	13.97	14.07	14.68	15.63	14.59	13.89	14.01	15.50		14.47
Colombia: Atlantic Port (East)	19.77	19.64	20.02	21.28	20.18	19.75	19.99	21.13		20.29
Colombia: Pacific Ports (West)	28.01	28.15	28.64	29.95	28.69	29.38	29.10	29.02		29.17

Country	U.S. Gulf to					PNW to				
	1st qtr. 2018	2nd qtr. 2018	3rd qtr. 2018	4th qtr. 2018	Average	1st qtr. 2019	2nd qtr. 2019	3rd qtr. 2019	4th qtr. 2019	Average
Japan	24.25	24.37	24.97	26.69	25.07	22.98	23.56	27.90		24.81
China	23.40	23.72	24.26	25.97	24.34	22.44	22.93	27.28		24.22

Note: qtr. = quarter.

Source: O'Neil Commodity Consulting.

Figure 6: Grain vessel rates and spread, U.S. to Japan



Note: Q = quarter; PNW = Pacific Northwest.

Source: O'Neil Commodity Consulting.

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