United States Department of Agriculture

Grain Transportation Report

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

Contact Us

April 9, 2020

Contents

The next release is April 16, 2020

WEEKLY HIGHLIGHTS

DOT's Build America Bureau Extends Deadline for Comments

On February 28, the U.S. Department of Transportation's (DOT) Build America Bureau requested input on the design and implementation of its Regional Infrastructure Accelerators program, with a deadline of 30 days for responses. However, because of the current COVID-19 national emergency and in response to requests, the Bureau has extended its due date to April 28, 2020. The Regional Infrastructure Accelerators program will assist entities in improving their infrastructure priorities. It will also help them strategize financing to accelerate development of projects eligible for funding under the Transportation Infrastructure Finance and Innovation Act (TIFIA) program.

FMC Initiates Fact Finding 29

On April 6, the Federal Maritime Commission (FMC) announced it will engage "Supply Chain Innovation Teams" to "identify actions that can provide immediate relief to the most pressing challenges the American freight delivery system faces from COVID-19 related disruptions." The teams comprise key executives from all facets of the ocean cargo system. The initiative comes as part of Commissioner Rebecca Dye's Fact Finding 29, International Ocean Transportation Supply Chain Engagement, announced last week. Members of the public not participating on a team, but who wish to provide advice, are encouraged to do so by writing to FF29@FMC.gov. For more information, see FMC's press release.

Grain Inspections Recede From Previous Week

For the week ending April 2, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions totaled 1.9 million metric tons (mmt), according to USDA's Federal Grain Inspection Service. Total grain inspections were down 9 percent from the previous week, down 25 percent from last year, and down 25 percent from the 3-year average. Compared to the previous week, corn inspections were unchanged at 1.25 mmt, but wheat and soybean inspections decreased 17 percent and 28 percent, respectively. Total grain inspections decreased 42 percent from the previous week in the Pacific Northwest (PNW), but increased 6 percent in the Mississippi Gulf. During the last 4 weeks, inspections of grain were 17 percent below last year and 23 percent below the 3-year average.

Snapshots by Sector

Export Sales

For the week ending March 26, **unshipped balances** of wheat, corn, and soybeans totaled 23.7 million metric tons (mmt). This represented a 28-percent decrease in outstanding sales, compared to the same time last year. Net **corn export sales** were 1.075 mmt, down 41 percent from the past week. Net **soybean export sales** were 0.958 mmt, up 6 percent from the previous week. Net weekly **wheat export sales** were 0.073 mmt, down 90 percent from the previous week.

Rail

U.S. Class I railroads originated 22,212 **grain carloads** during the week ending March 28. This is a 6-percent increase from the previous week, 2 percent less than last year, and 5 percent lower than the 3-year average.

Average April shuttle **secondary railcar** bids/offers (per car) were $44 below tariff for the week ending April 2. This was $69 less than last week and $650 lower than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending April 4, **barge grain movements** totaled 421,468. This was 18 percent less than the previous week and 17 percent less than the same period last year.

For the week ending April 4, 267 grain barges **moved down river**— 43 fewer barges than the previous week. There were 634 grain barges **unloaded in New Orleans**, 8 percent more than the previous week.

Ocean

For the week ending April 2, 27 **oceangoing grain vessels** were loaded in the Gulf—10 percent fewer than the same period last year. Within the next 10 days (starting April 3), 43 vessels were expected to be loaded—2 percent fewer than the same period last year.

As of April 2, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $38.75. This was 1 percent less than the previous week. The rate from PNW to Japan was $19.75 per mt, 1 percent less than the previous week.

Fuel

For the week ending April 6, the U.S. average **diesel fuel price** decreased 3.8 cents from the previous week to $2.548 per gallon, 54.5 cents below the same week last year.

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Web: **http://dx.doi.org/10.9752/TS056.04-09-2020**

Feature Article/Calendar

First-Quarter 2020 Grain Inspections Down From Last Year

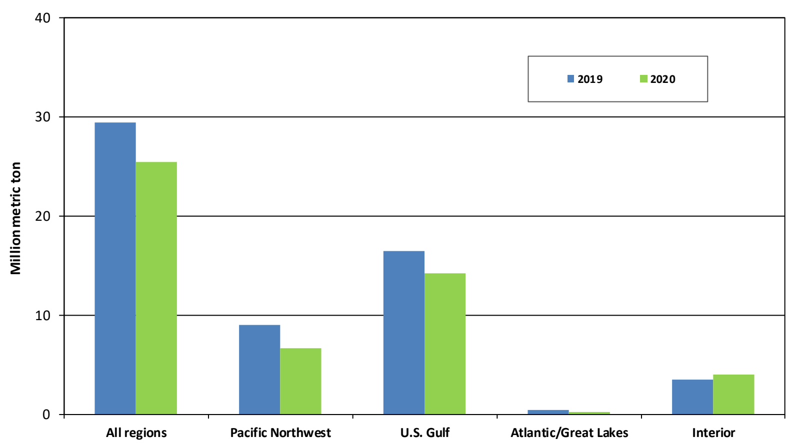
Inspections of grain from all U.S. ports in first quarter 2020 decreased 15 percent from first quarter 2019 (year to year) to 25.2 million metric tons (mmt), according to data from USDA's Federal Grain Inspection Service (FGIS) (fig. 1). The decline stemmed mainly from progressively lower demand in Africa and Europe. All three grains—corn, wheat, and soybeans—registered a decline. First-quarter 2020 inspections marked an 18-percent drop from the 5-year average and the lowest level since first-quarter 2013 inspections (22 mmt). In the U.S. Gulf and the Pacific Northwest (PNW), grain inspections were down year to year but, in the Interior, reached a record high because of increased demand from Mexico.

Breakdown by Region

Inspections in the U.S. Gulf. First-quarter grain inspections at U.S. Gulf ports were 14.2 mmt, down 16 percent year to year (see fig. 1). U.S. Gulf inspections were 20 percent below the 5-year average. First-quarter U.S. Gulf corn inspections were down 9 percent, and soybean inspections were down 11 percent year to year. Total U.S. Gulf wheat inspections decreased 38 percent year to year, as a result of lower shipments to Africa and Latin America. Although first-quarter rail deliveries of grain to U.S. ports dropped significantly year to year (**GTR table 3**), barge movements of grain to the U.S. Gulf through the locking sections of the Mississippi, Ohio, and Arkansas Rivers increased moderately.

Inspections in PNW. First-quarter grain inspections in PNW ports were 6.22 mmt, down 26 percent year to year (see fig. 1). PNW inspections were 28 percent below the 5-year average. Lower PNW inspections are also reflected in a 22-percent drop in first-quarter rail deliveries of grain to PNW ports (**GTR table 3**). Year to year, corn inspections in the PNW dropped 47 percent, and soybean inspections dropped 45 percent, as a result of lower demand from Asia. However, PNW wheat inspections increased 16 percent year to year.

Figure 1: First quarter grain inspections, by region



Source: USDA, Federal Grain Inspection Service

Inspections in the Great Lakes and Atlantic. Year to year, first-quarter grain inspections for Great Lakes and Atlantic ports decreased 51 percent to 0.221 mmt, which was 69 percent below the 5-year average. This dramatic decline—distributed across all grains (corn, soybeans, and wheat)—mainly resulted from lower grain shipments to Asia.

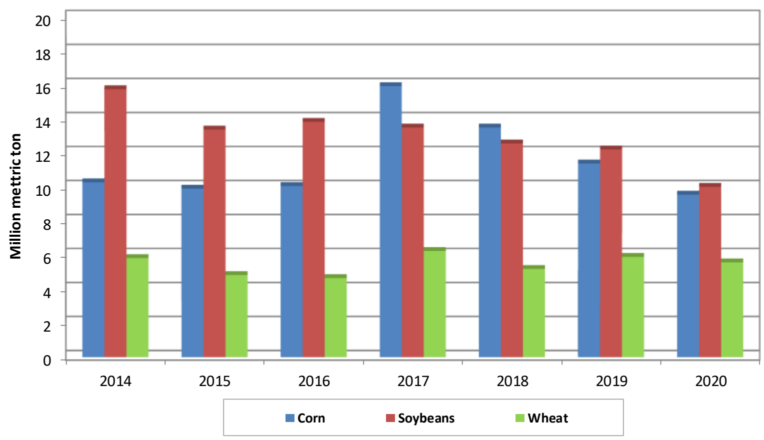
Inspections in the Interior. First-quarter grain inspections in the interior reached a record 4 mmt, up 12 percent compared year to year and up 27 percent from the 5-year average. Owing to higher shipments to Mexico, Interior soybean inspections reached a record 1.69 mmt, increasing

14 percent year to year, and Interior wheat inspections reached a record .542 mmt, increasing 14 percent year to year. Inspections of corn in the Interior increased 5 percent year to year.

Breakdown by Commodity

Corn and Soybean Inspections. First-quarter corn inspections reached 9.6 mmt, down 16 percent year to year (fig. 2). Corn inspections were 21 percent below the 5-year average. Year to year, first-quarter U.S. Gulf corn inspections decreased 28 percent, and PNW corn inspections decreased 47 percent. Rising export competition from Argentina and the Ukraine have continued to dampen demand for U.S. corn.

Figure 2: First quarter grain inspections, by type



Source: USDA, Federal Grain Inspection Service

Total first-quarter soybean inspections were 10 mmt, down 18 percent year to year (see fig. 2) and 24 percent below the 5-year average. In the U.S. Gulf, year-to-year first-quarter soybean inspections decreased 11 percent and, in the PNW, dropped 45 percent. Soybeans inspected for export to China decreased 37 percent year to year.

Wheat Inspections. Total first-quarter wheat inspections reached 5.6 mmt, down 6 percent from year to year but 4 percent above the 5-year average. U.S. wheat inspections decreased mainly because of a 38-percent drop in the U.S. Gulf—the result of lower demand from Africa. PNW and interior wheat inspections increased year to year.

Market Outlook. According to the March *World Agricultural Supply and Demand Estimates* report, the 2019/20 forecast for U.S. corn exports is unchanged from February and down 16 percent from the 2018/19 marketing year. Wheat exports are also unchanged from February but is projected to increase 7 percent from the previous year. The March projection for 2019/20 soybean exports is unchanged from February as well but is up 4 percent from 2018/19. Cumulative (shipped) marketing year-to-date export sales of corn are well below numbers for the same period in marketing year 2018/19. Cumulative export sales of soybeans and wheat are up moderately from 2018/19 (**GTR table 12**). *Johnny.Hill@usda.gov*

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
04/08/20	171	n/a	222	183	173	140
04/01/20	174	n/a	225	183	174	142

[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); ocean = routes to Japan ($/metric ton); n/a = not available.
Source: USDA, Agricultural Marketing Service.

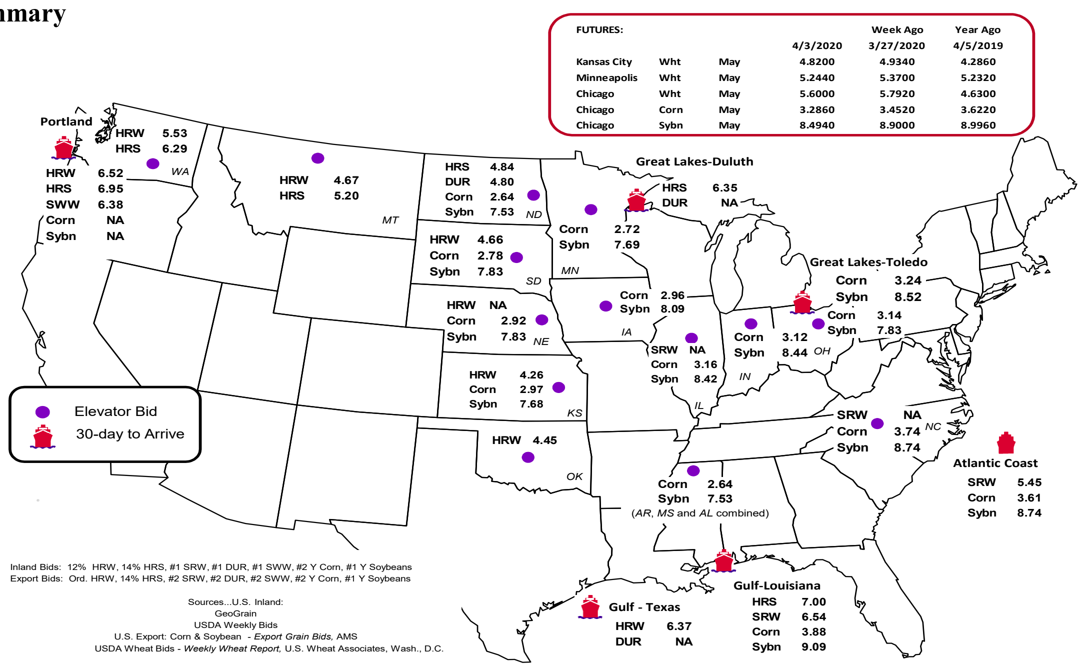
Table 2
Market Update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	4/3/2020	3/27/2020
Corn	IL–Gulf	-0.72	-0.68
Corn	NE–Gulf	-0.96	-0.88
Soybean	IA–Gulf	-1.00	-1.07
HRW	KS–Gulf	-2.11	-2.14
HRS	ND–Portland	-2.11	-2.15

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]
4/01/2020[p]	112	658	4,312	240	5,322	3/28/2020	2,474
3/25/2020[r]	14	676	4,574	216	5,480	3/21/2020	2,240
2020 YTD[r]	4,468	9,147	59,367	2,905	75,887	2020 YTD	29,973
2019 YTD[r]	10,842	15,342	77,300	5,183	108,667	2019 YTD	29,140
2020 YTD as % of 2019 YTD	41	60	77	56	70	% change YTD	103
Last 4 weeks as % of 2019[2]	12	76	69	77	63	Last 4wks. % 2019	121
Last 4 weeks as % of 4-year avg.[2]	22	49	71	64	63	Last 4wks. % 4 yr.	120
Total 2019	40,974	51,167	251,181	16,192	359,514	Total 2019	127,622
Total 2018	22,118	46,532	310,449	21,432	400,531	Total 2018	129,674

[1]Data is incomplete as it is voluntarily provided.

[2] Compared with same 4-weeks in 2019 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.

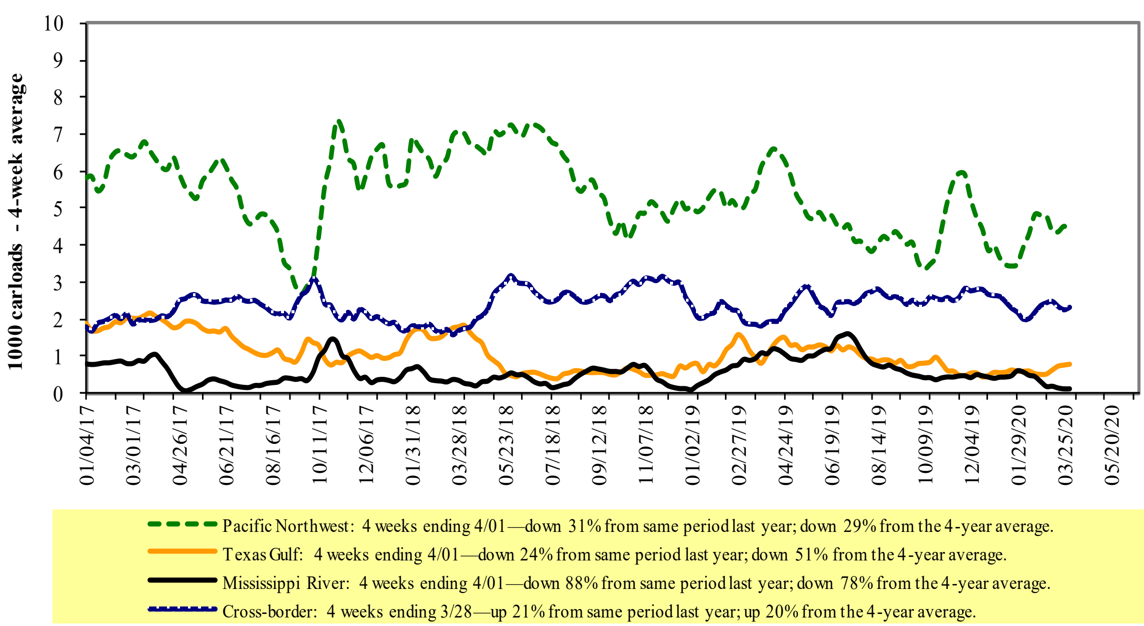
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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: 3/28/2020	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,547	2,319	11,651	1,564	5,131	22,212	4,584	4,297
This week last year	2,314	2,823	10,997	1,609	4,822	22,565	4,788	4,567
2020 YTD	22,333	29,551	136,327	14,246	58,529	260,986	44,376	48,718
2019 YTD	25,793	34,719	137,349	14,828	64,809	277,498	51,704	51,806
2020 YTD as % of 2019 YTD	87	85	99	96	90	94	86	94
Last 4 weeks as % of 2019*	80	89	111	90	103	102	92	101
Last 4 weeks as % of 3-yr. avg.**	87	92	94	114	89	93	94	95
Total 2019	91,611	137,179	568,369	58,527	260,269	1,115,955	212,534	235,892

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

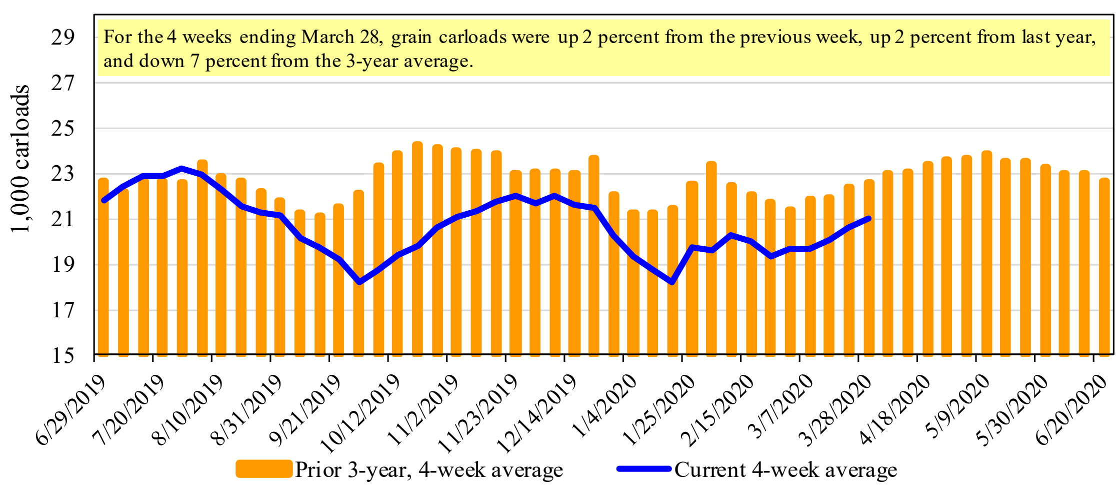
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

Note: NS = Norfolk Southern; KCS = Kansas City Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific.

Source: Association of American Railroads.

Figure 3

Total weekly U.S. Class I railroad grain carloads



Source: Association of American Railroads.

Table 5

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

For the week ending: 4/2/2020		Apr-20	Apr-19	May-20	May-19	Jun-20	Jun-19	Jul-20	Jul-19
BNSF[3]	COT grain units	0	n/a	0	n/a	no bids	n/a	no bids	n/a
	COT grain single-car	0	n/a	0	n/a	0	n/a	0	n/a
UP[4]	GCAS/Region 1	10	no offer	no offer	no offer	no offer	10	n/a	n/a
	GCAS/Region 2	no bid	no offer	no bid	no offer	no bid	10	n/a	n/a

(Delivery period)

[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 = BNSF Railway Certificate of Transportation; north grain and south grain bids were combined effective the week ending 6/24/06.

[4]UP - GCAS = Union Pacific Railroad Grain Car Allocation System.

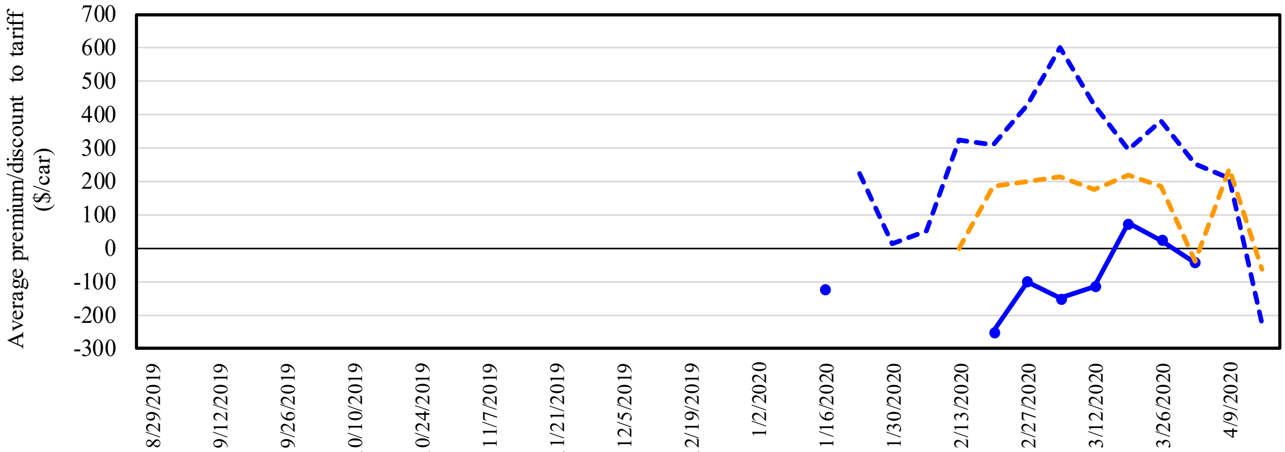
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 April 2020, secondary market



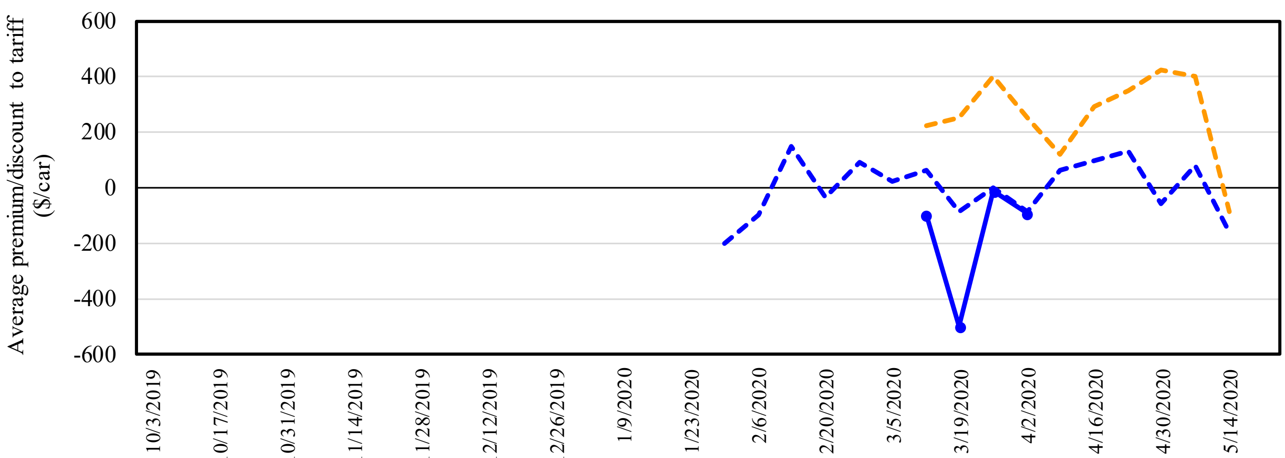
4/2/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$25	-$63

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.
Average shuttle bids/offers fell $69 this week and are $119 below the peak.

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

Figure 5
Bids/offers for railcars to be delivered in May 2020, secondary market



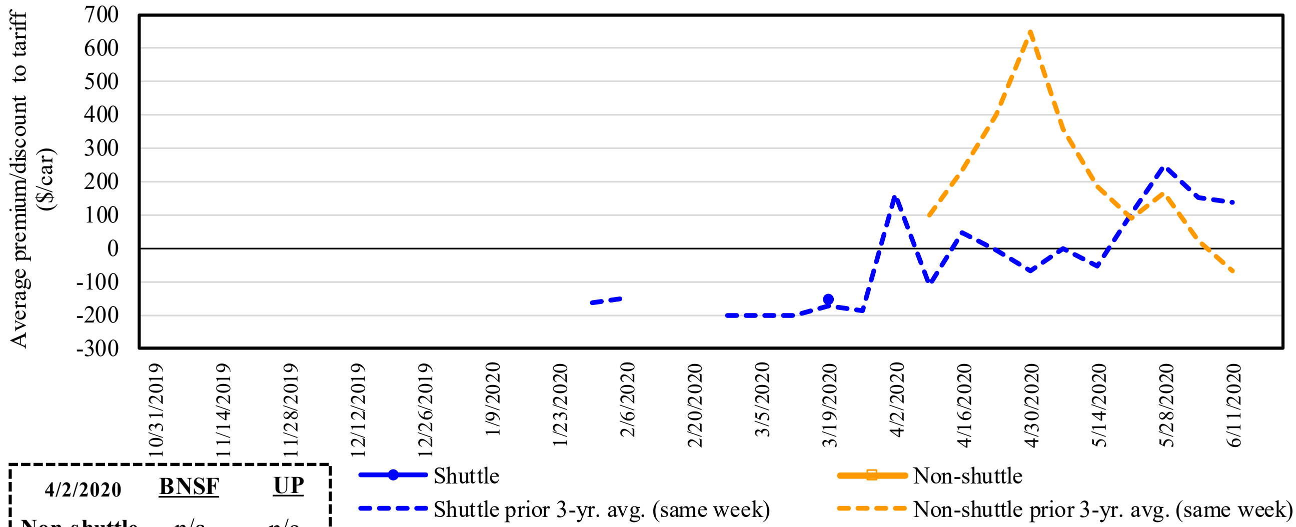
4/2/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$88	-$100

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.
Average shuttle bids/offers fell $81 this week and are $81 below the peak.

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

Figure 6
Bids/offers for railcars to be delivered in June 2020, secondary market



4/2/2020	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; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service.

Table 6

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

For the week ending: 4/2/2020		Delivery period					
		Apr-20	**May-20**	**Jun-20**	**Jul-20**	**Aug-20**	**Sep-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 2019	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 2019	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**(25)**	**(88)**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	0	n/a	n/a	n/a	n/a	n/a
	Change from same week 2019	(925)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**(63)**	**(100)**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(138)	(87)	n/a	n/a	n/a	n/a
	Change from same week 2019	(375)	n/a	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;
BNSF = BNSF Railway; UP = Union Pacific Railroad.

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. Together with **fuel surcharges** and any **auction and secondary rail** values, the tariff rail rate constitutes 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. However, during times of high rail demand or short supply, high auction and secondary rail values can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

Tariff rail rates for unit and shuttle train shipments[1]

April 2020	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	$86	$40.41	$1.10	0
	Grand Forks, ND	Duluth-Superior, MN	$4,333	$0	$43.03	$1.17	2
	Wichita, KS	Los Angeles, CA	$7,240	$0	$71.90	$1.96	1
	Wichita, KS	New Orleans, LA	$4,525	$151	$46.44	$1.26	-1
	Sioux Falls, SD	Galveston-Houston, TX	$6,976	$0	$69.28	$1.89	1
	Colby, KS	Galveston-Houston, TX	$4,801	$166	$49.32	$1.34	0
	Amarillo, TX	Los Angeles, CA	$5,121	$231	$53.14	$1.45	0
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,900	$171	$40.43	$1.03	-3
	Toledo, OH	Raleigh, NC	$6,816	$0	$67.69	$1.72	4
	Des Moines, IA	Davenport, IA	$2,415	$36	$24.34	$0.62	7
	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	$106	$38.79	$0.99	-2
	Des Moines, IA	Los Angeles, CA	$5,680	$310	$59.48	$1.51	-1
Soybeans	Minneapolis, MN	New Orleans, LA	$3,631	$156	$37.61	$1.02	-12
	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	$171	$47.83	$1.30	-2
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
	Colby, KS	Portland, OR	$6,012	$272	$62.40	$1.70	1
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	$171	$39.63	$1.01	0
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	0
	Des Moines, IA	Amarillo, TX	$4,220	$134	$43.24	$1.10	4
	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	$197	$50.37	$1.37	2
	Toledo, OH	Huntsville, AL	$4,805	$0	$47.72	$1.30	4
	Grand Island, NE	Portland, OR	$5,260	$278	$55.00	$1.50	-8

[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: April 2020							
Commodity	Origin state	Destination region	Tariff rate per car[1]	Fuel surcharge per car[2]	Tariff rate plus fuel surcharge per: metric ton[3]	Tariff rate plus fuel 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	$118	$70.44	$1.92	0
	KS	Guadalajara, JA	$7,534	$502	$82.10	$2.23	3
	TX	Salinas Victoria, NL	$4,329	$72	$44.96	$1.22	0
Corn	IA	Guadalajara, JA	$8,902	$433	$95.39	$2.42	5
	SD	Celaya, GJ	$8,140	$0	$83.17	$2.11	3
	NE	Queretaro, QA	$8,278	$244	$87.08	$2.21	1
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,643	$238	$80.53	$2.04	1
	SD	Torreon, CU	$7,690	$0	$78.57	$1.99	3
Soybeans	MO	Bojay (Tula), HG	$8,547	$405	$91.46	$2.49	4
	NE	Guadalajara, JA	$9,172	$424	$98.04	$2.67	4
	IA	El Castillo, JA	$9,490	$0	$96.97	$2.64	4
	KS	Torreon, CU	$7,964	$295	$84.38	$2.29	4
Sorghum	NE	Celaya, GJ	$7,772	$385	$83.34	$2.12	4
	KS	Queretaro, QA	$8,108	$148	$84.35	$2.14	1
	NE	Salinas Victoria, NL	$6,713	$119	$69.80	$1.77	1
	NE	Torreon, CU	$7,092	$272	$75.24	$1.91	2

[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.

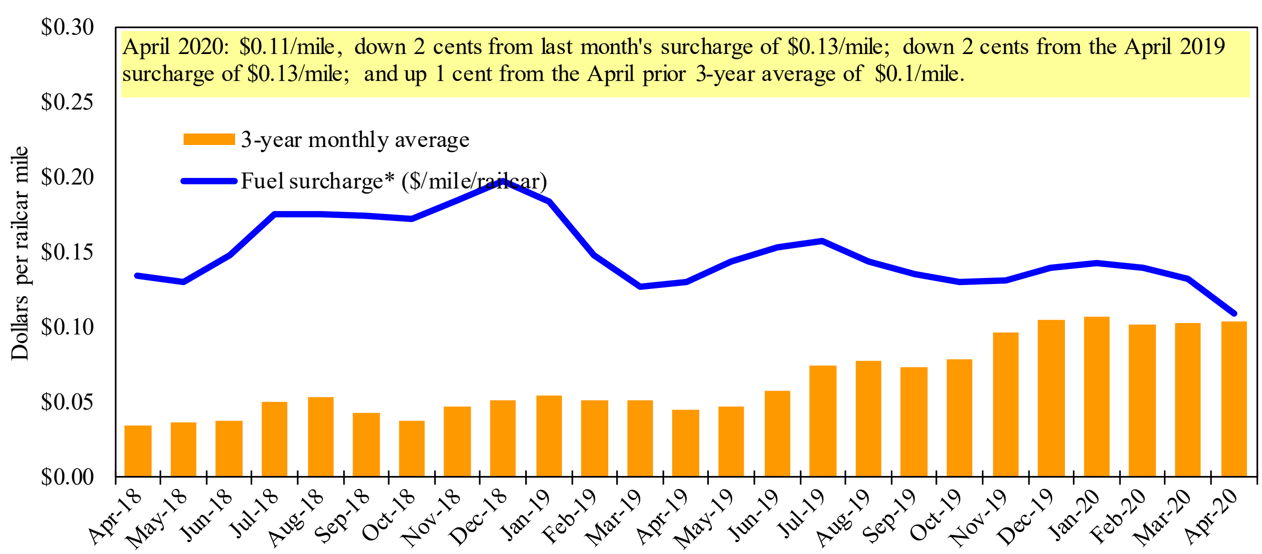
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

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

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

Figure 7

Railroad fuel surcharges, North American weighted average[1]

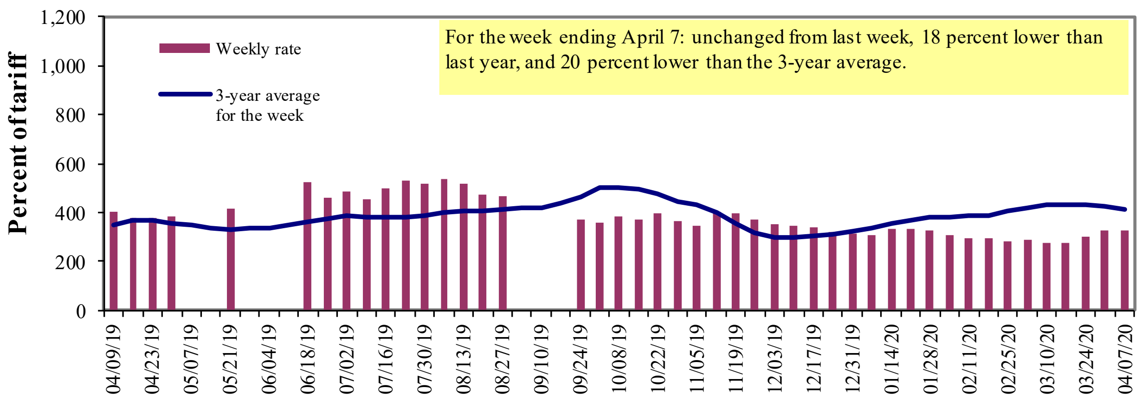


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.
Sources: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

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]	4/7/2020	383	343	330	215	223	223	204
	3/31/2020	388	343	330	226	224	224	207
$/ton	4/7/2020	23.71	18.25	15.31	8.58	10.46	9.01	6.41
	3/31/2020	24.02	18.25	15.31	9.02	10.51	9.05	6.50
Current week % change from the same week:								
	Last year	-	-	-18	-30	-41	-42	-30
	3-year avg. [2]	-14	-13	-20	-35	-41	-42	-34
Rate[1]	April	381	340	328	216	219	219	204
	June	381	339	-	220	219	219	204

[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 are included in tables on this page. The 1976 benchmark rates per ton are provided in map.

Map Credit: USDA, Agricultural Marketing Service

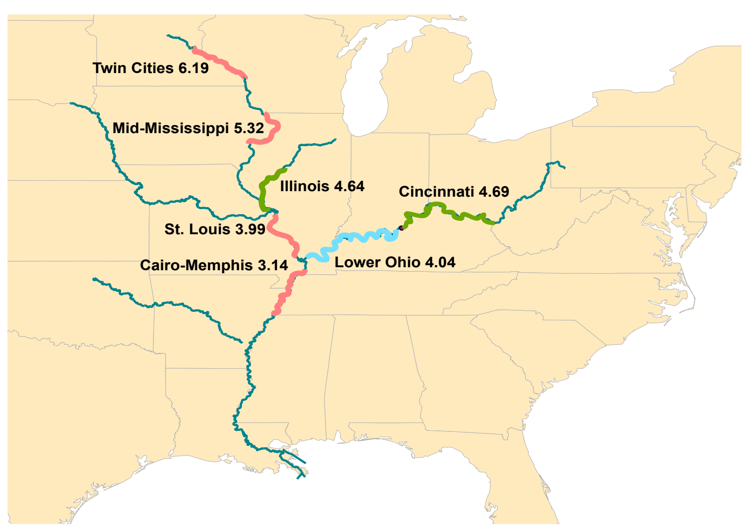
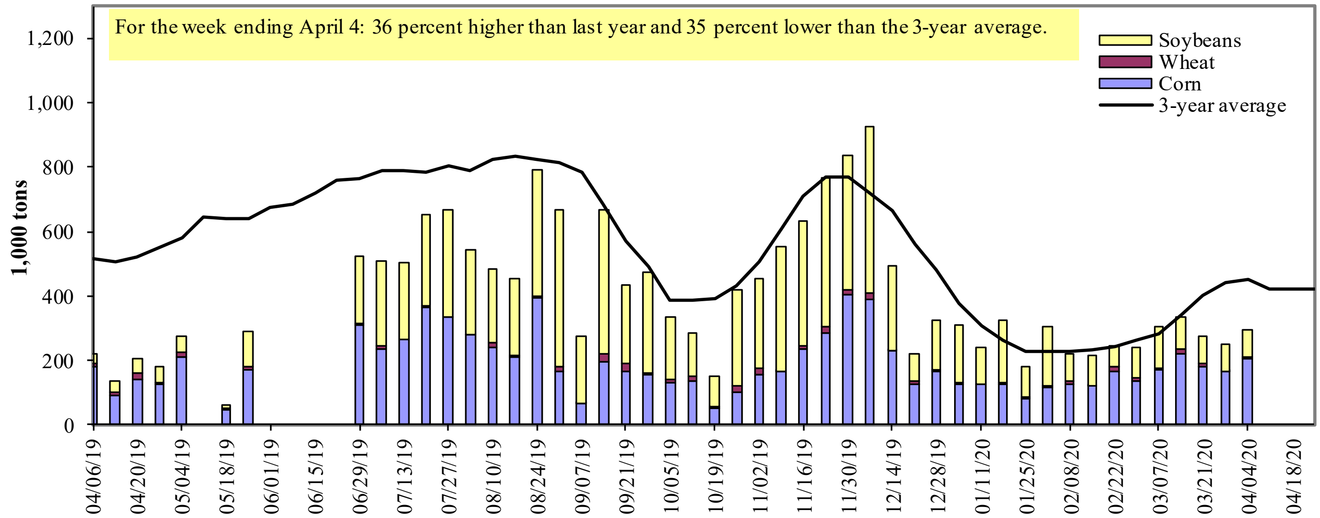


Figure 10

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 04/04/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	0	0	0	0	0
Alton, IL (L26)	192	6	78	0	277
Granite City, IL (L27)	205	6	85	0	296
Illinois River (La Grange)	196	0	69	0	265
Ohio River (Olmsted)	56	10	28	0	95
Arkansas River (L1)	1	10	20	0	31
Weekly total - 2020	263	27	132	0	421
Weekly total - 2019	309	49	145	2	505
2020 YTD[1]	3,577	422	2,910	13	6,922
2019 YTD[1]	3,207	638	2,755	40	6,640
2020 as % of 2019 YTD	112	66	106	34	104
Last 4 weeks as % of 2019[2]	90	51	64	15	77
Total 2019	12,780	1,631	14,683	154	29,247

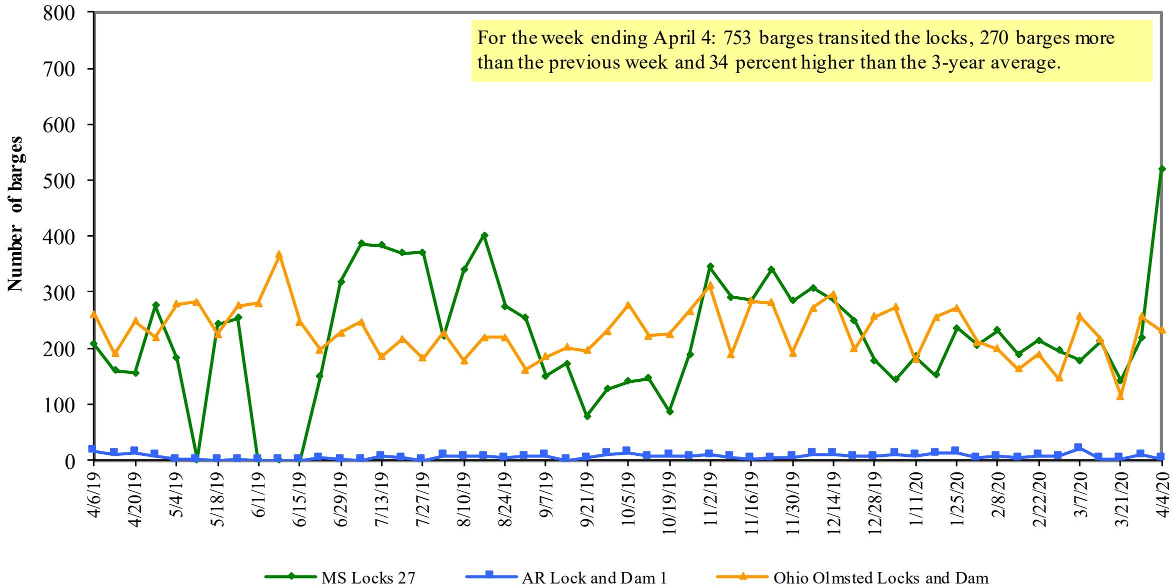
[1] Weekly total, YTD (year-to-date), and calendar year total include MS/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. L (as in "L15") refers to a lock or lock and dam facility. Olmsted = Olmsted Locks and Dam. La Grange = La Grange Lock and Dam.

[2] As a percent of same period in 2019.

Note: Total may not add exactly because of rounding. Starting from 11/24/2018, weekly movement through Ohio 52 is replaced by Olmsted.
Source: U.S. Army Corps of Engineers.

Figure 11

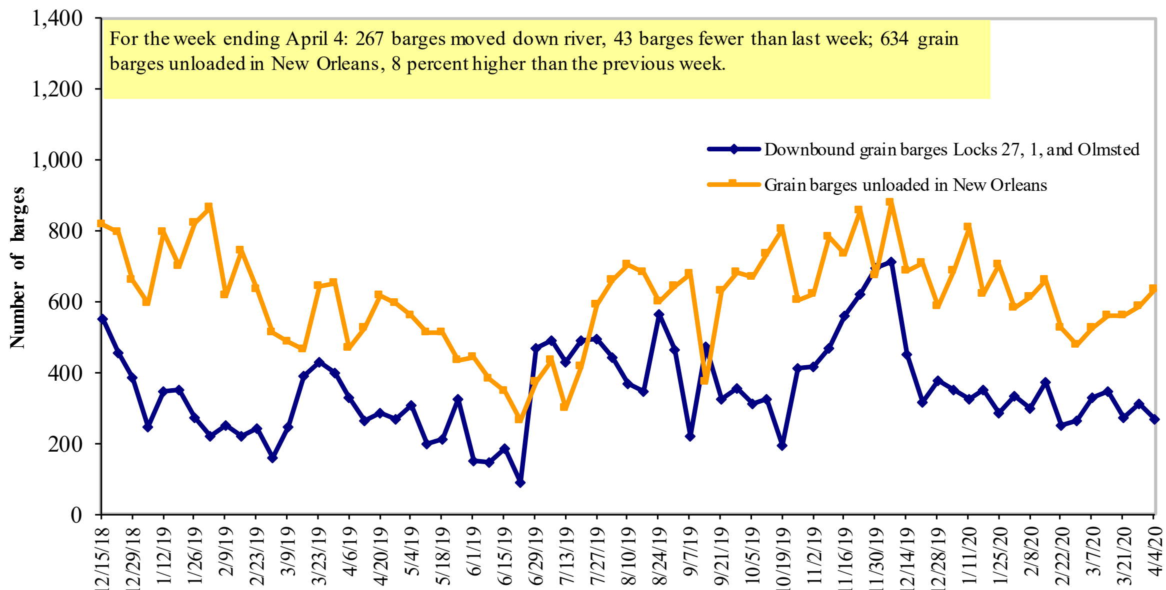
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



Source: U.S. Army Corps of Engineers.

Figure 12

Grain barges for export in New Orleans region



Note: Olmsted = Olmsted Locks and Dam.

Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing 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 4/6/2020 (U.S. $/gallon)

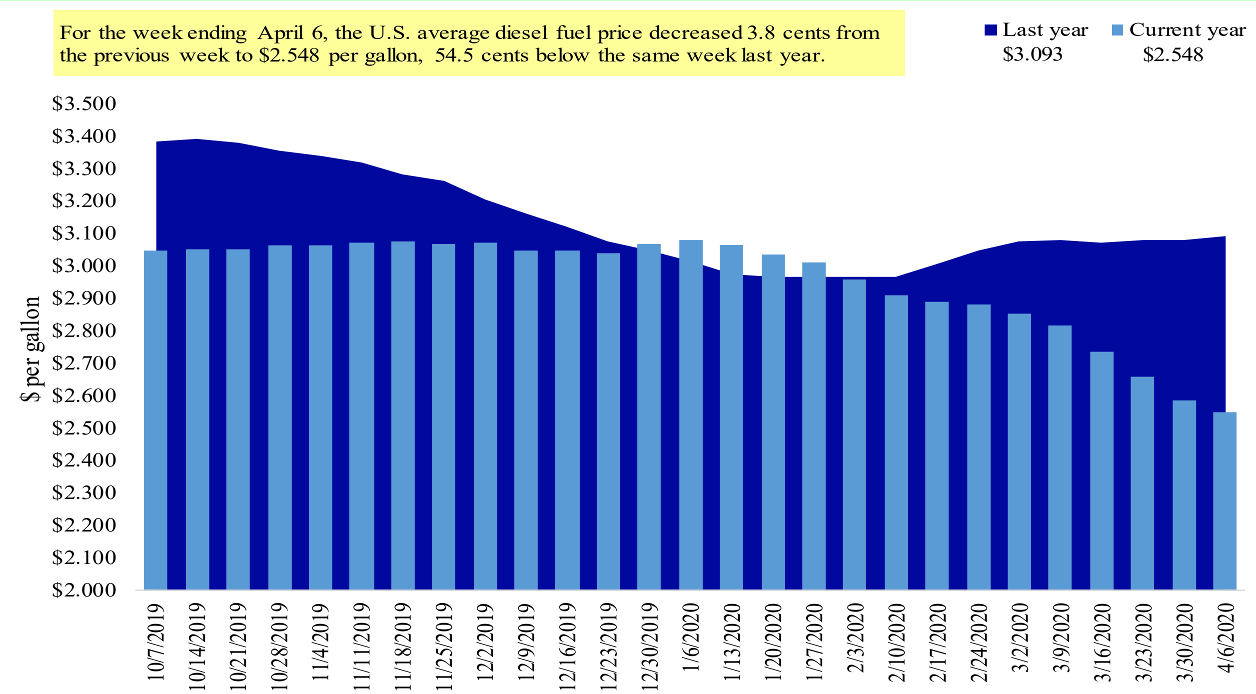
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.634	-0.037	-0.503
	New England	2.745	-0.048	-0.448
	Central Atlantic	2.827	-0.039	-0.497
	Lower Atlantic	2.480	-0.034	-0.518
II	Midwest	2.394	-0.038	-0.599
III	Gulf Coast	2.325	-0.038	-0.554
IV	Rocky Mountain	2.541	-0.051	-0.487
V	West Coast	3.090	-0.036	-0.501
	West Coast less California	2.754	-0.044	-0.435
	California	3.368	-0.027	-0.542
Total	United States	2.548	-0.038	-0.545

[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]									
3/26/2020	1,812	279	1,538	1,149	230	5,008	13,601	5,102	23,711
This week year ago	2,563	923	1,403	1,103	117	6,110	13,154	13,636	32,900
Cumulative exports-marketing year[2]									
2019/20 YTD	7,492	2,060	5,710	3,830	682	19,775	18,307	31,760	69,841
2018/19 YTD	6,073	2,320	5,314	4,142	364	18,214	30,041	29,941	78,196
YTD 2019/20 as % of 2018/19	123	89	107	92	187	109	61	106	89
Last 4 wks. as % of same period 2018/19*	71	33	114	99	161	82	101	33	69
Total 2018/19	8,591	3,204	6,776	5,164	479	24,214	48,924	46,189	119,327
Total 2017/18	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 3/26/2020	**Total commitments[2]**		**% change**	**Exports[3]**
	2019/20	**2018/19**	**current MY**	**3-yr. avg.**
	current MY	**last MY***	**from last MY**	**2016-18**
	- 1,000 mt -			
Mexico	11,650	13,878	(16)	14,659
Japan	6,849	9,348	(27)	11,955
Korea	1,409	3,409	(59)	4,977
Colombia	3,075	3,455	(11)	4,692
Peru	15	1,967	(99)	2,808
Top 5 importers	**22,998**	**32,056**	**(28)**	**39,091**
Total U.S. corn export sales	**31,907**	**43,195**	**(26)**	**54,024**
% of projected exports	73%	82%		
Change from prior week[2]	**1,075**	**537**		
Top 5 importers' share of U.S. corn export sales	72%	74%		72%
USDA forecast March 2020	**43,893**	**52,545**	**(16)**	
Corn use for ethanol USDA forecast, March 2020	**137,795**	**136,601**	**1**	

[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: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 14

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

For the week ending 3/26/2020	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	12,474	12,923	(3)	25,733
Mexico	3,971	4,581	(13)	4,271
Indonesia	1,527	1,693	(10)	2,386
Japan	2,002	1,995	0	2,243
Egypt	2,241	2,248	(0)	1,983
Top 5 importers	**22,215**	**23,439**	**(5)**	**36,616**
Total U.S. soybean export sales	**36,862**	**43,577**	**(15)**	**53,746**
% of projected exports	74%	91%		
change from prior week[2]	**958**	**1,972**		
Top 5 importers' share of U.S. soybean export sales	60%	54%		**68%**
USDA forecast, March 2020	**49,728**	**47,629**	**104**	

[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 revisions from previous week's outstanding sales and/or accumulated sales.
[3]FAS marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average.
Note: A red number in parentheses indicates a negative number; mt = metric ton.
Source: USDA, Foreign Agricultural Service.

Table 15

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

For the week ending 3/26/2020	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	3,206	3,000	7	3,047
Mexico	3,544	2,974	19	3,034
Japan	2,679	2,658	1	2,695
Nigeria	1,472	1,434	3	1,564
Indonesia	997	1,314	(24)	1,381
Korea	1,570	1,554	1	1,355
Taiwan	1,190	1,100	8	1,164
Egypt	101	812	(88)	821
Thailand	854	742	15	747
Iraq	262	616	(57)	574
Top 10 importers	**15,874**	**16,203**	(2)	**16,382**
Total U.S. wheat export sales	**24,783**	**24,324**	**2**	**24,388**
% of projected exports	91%	95%		
change from prior week[2]	**73**	**705**		
Top 10 importers' share of U.S. wheat export sales	64%	67%		67%
USDA forecast, March 2020	**27,248**	**25,504**	**7**	

[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.
Note: A red number in parentheses indicates a negative number.
Source: USDA, Foreign Agricultural Service.

Table 16

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

Port regions	For the week ending 04/02/20	Previous week*	Current week as % of previous	2020 YTD*	2019 YTD*	2020 YTD as % of 2019 YTD	Last 4-weeks as % of: Last year	Prior 3-yr. avg.	2019 total*
Pacific Northwest									
Wheat	177	199	89	3,929	3,371	117	102	84	13,961
Corn	185	437	42	1,646	3,058	54	82	57	7,047
Soybeans	4	0	n/a	2,137	3,880	55	13	21	11,969
Total	**367**	**637**	**58**	**7,712**	**10,309**	**75**	**59**	**57**	**32,977**
Mississippi Gulf									
Wheat	19	72	26	970	1,364	71	71	69	4,448
Corn	855	616	139	7,282	7,189	101	115	88	20,763
Soybeans	194	315	62	7,273	7,664	95	80	86	31,398
Total	**1,068**	**1,003**	**106**	**15,526**	**16,217**	**96**	**99**	**86**	**56,609**
Texas Gulf									
Wheat	83	39	210	1,001	1,655	60	58	61	6,009
Corn	30	0	n/a	168	146	115	73	66	640
Soybeans	0	0	n/a	7	0	n/a	n/a	n/a	2
Total	**113**	**40**	**285**	**1,175**	**1,801**	**65**	**59**	**61**	**6,650**
Interior									
Wheat	57	95	61	654	417	157	156	174	1,987
Corn	179	194	92	1,988	1,795	111	122	111	7,857
Soybeans	107	104	103	1,949	1,698	115	93	99	7,043
Total	**343**	**393**	**87**	**4,592**	**3,910**	**117**	**114**	**113**	**16,887**
Great Lakes									
Wheat	0	0	n/a	1	30	3	0	0	1,339
Corn	0	0	n/a	0	0	n/a	n/a	n/a	11
Soybeans	0	0	n/a	0	16	0	n/a	n/a	493
Total	**0**	**0**	**n/a**	**1**	**47**	**2**	**0**	**0**	**1,844**
Atlantic									
Wheat	1	0	n/a	1	1	n/a	n/a	5	37
Corn	0	0	n/a	0	42	0	0	0	99
Soybeans	8	17	49	294	418	70	36	37	1,353
Total	**9**	**17**	**53**	**294**	**461**	**64**	**33**	**33**	**1,489**
U.S. total from ports*									
Wheat	337	406	83	6,555	6,839	96	86	79	27,781
Corn	1,249	1,248	100	11,085	12,230	91	106	81	36,417
Soybeans	313	436	72	11,660	13,677	85	54	67	52,258
Total	**1,900**	**2,089**	**91**	**29,300**	**32,746**	**89**	**83**	**77**	**116,457**

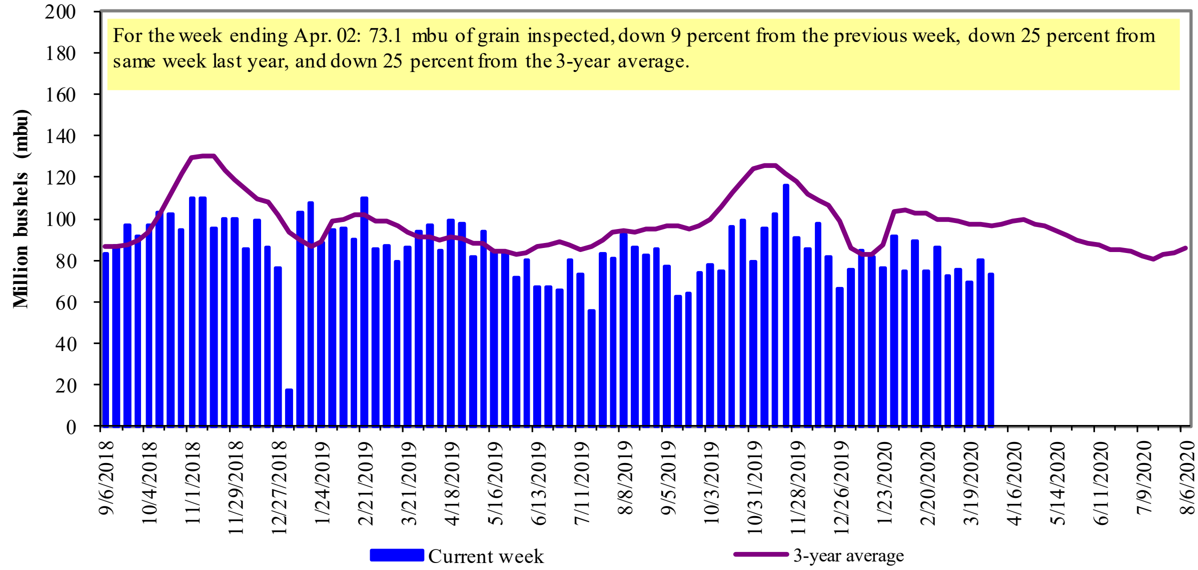
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2019.

Figure 14

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

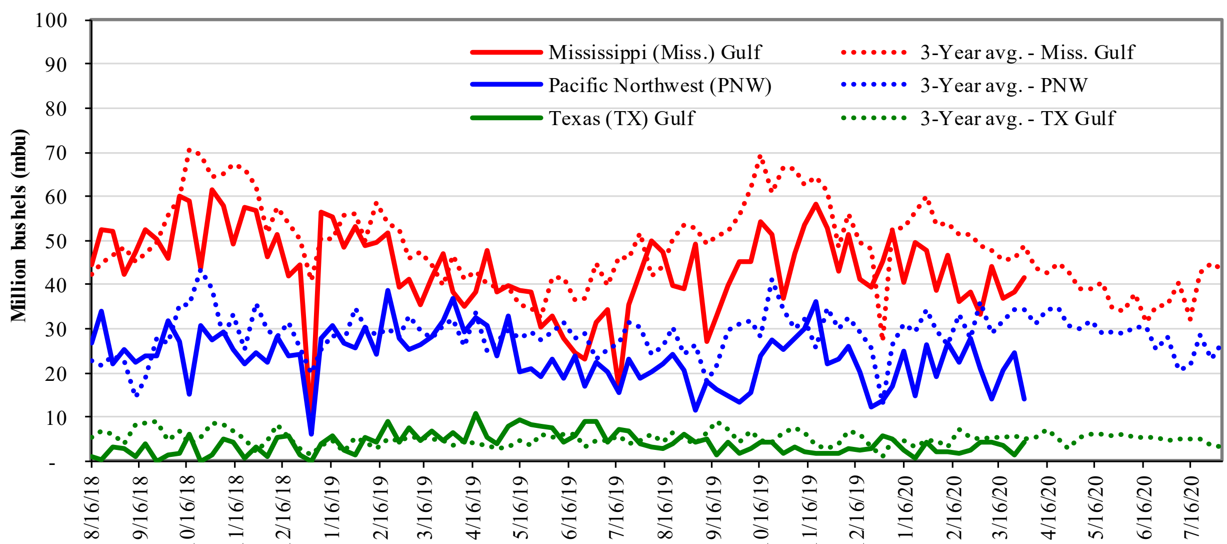


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 04/02/20 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf:	41.5	Last wk:	up 8	up 190	up 14	down 43
PNW:	14.0	Last Year (same wk):	up 8	down 35	up 2	down 62
TX Gulf:	4.2	3-yr avg. (4-wk. mov. Avg):	down 12	down 22	down 13	down 57

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

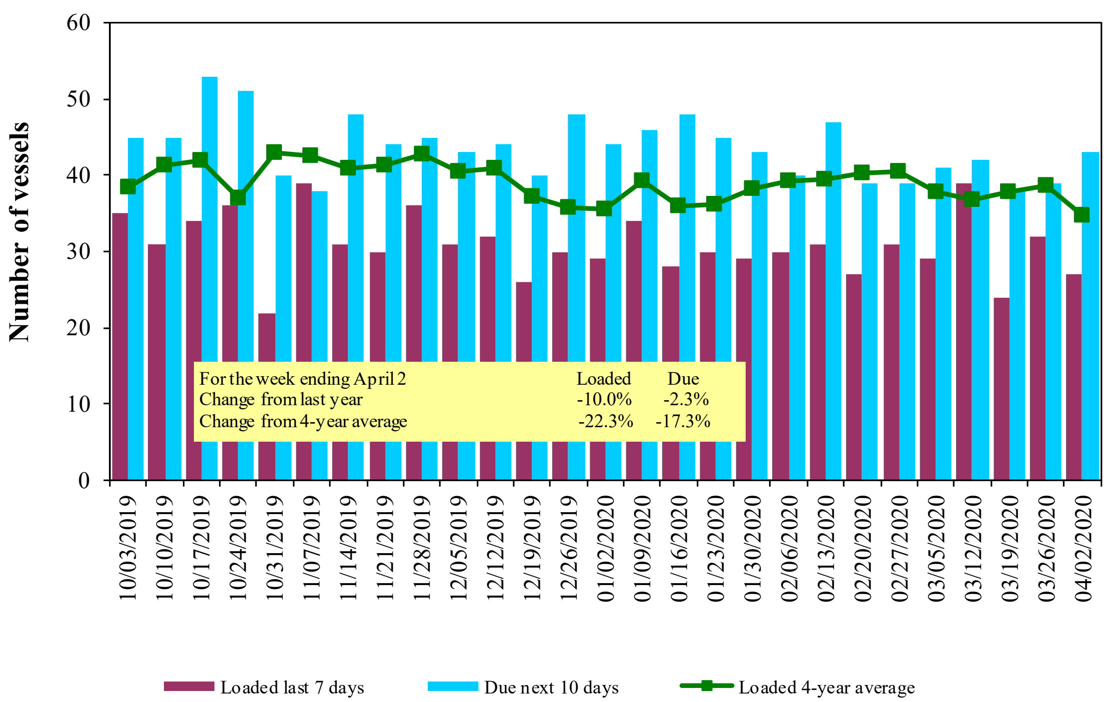
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
4/2/2020	26	27	43	11
3/26/2020	25	32	39	13
2019 range	(26…61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service.

Figure 16

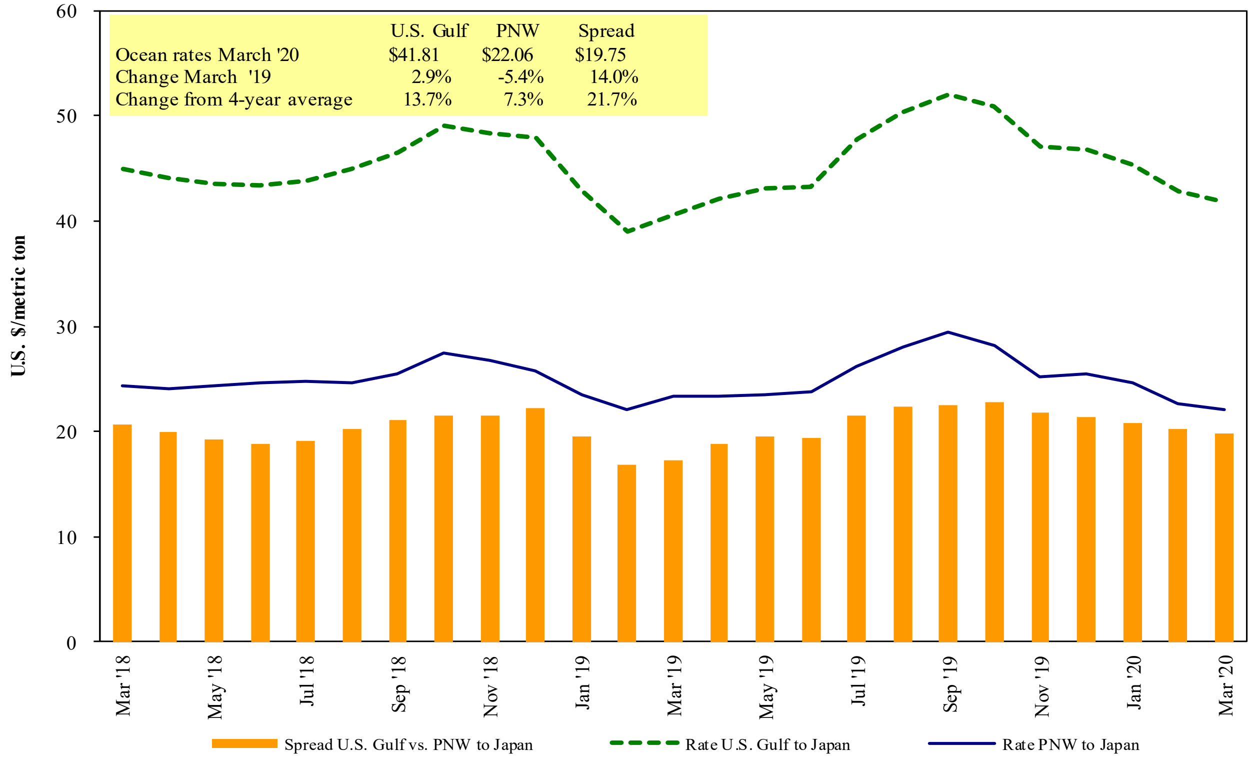
U.S. Gulf[1] vessel loading activity



[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 04/04/2020

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Djibouti	Sorghum	Apr 17/27	45,730	105.75*
U.S. Gulf	China	Heavy grain	Jan 25/30	65,000	46.50
U.S. Gulf	Rotterdam	Heavy grain	Feb 5/11	55,000	19.50
PNW	Yemen	Wheat	Mar 26/Apr 6	35,000	51.84*
PNW	Taiwan	Wheat	Apr 27/May 11	50,700	29.40
PNW	China	Heavy grain	Jan 22/26	63,000	23.00
Brazil	China	Heavy grain	May 1/31	60,000	33.25 op 33.00
Brazil	China	Heavy grain	Apr 2/16	66,000	30.75
Brazil	China	Heavy grain	Mar 1/10	65,000	32.00
Brazil	China	Heavy grain	Feb 12/21	65,000	34.50
Brazil	China	Heavy grain	Feb 18/27	60,000	34.00

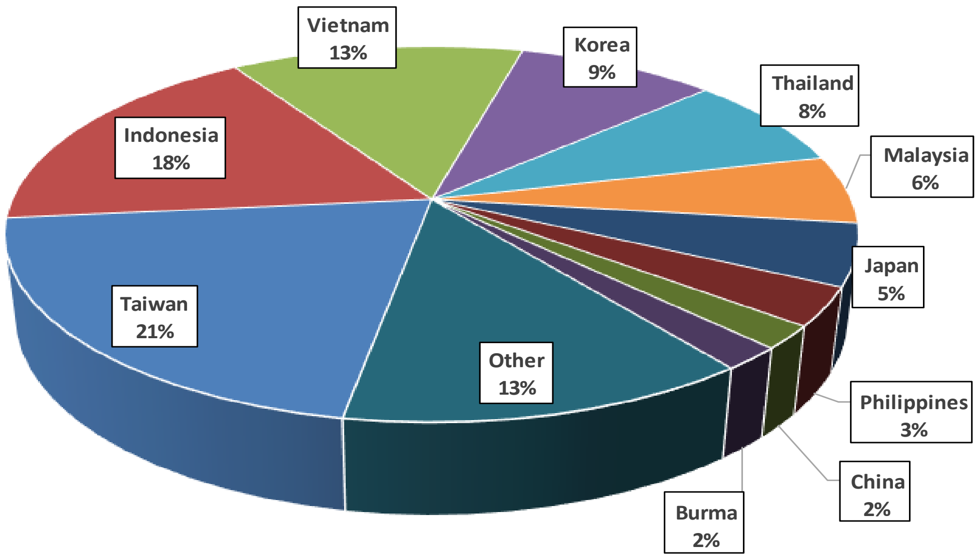
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

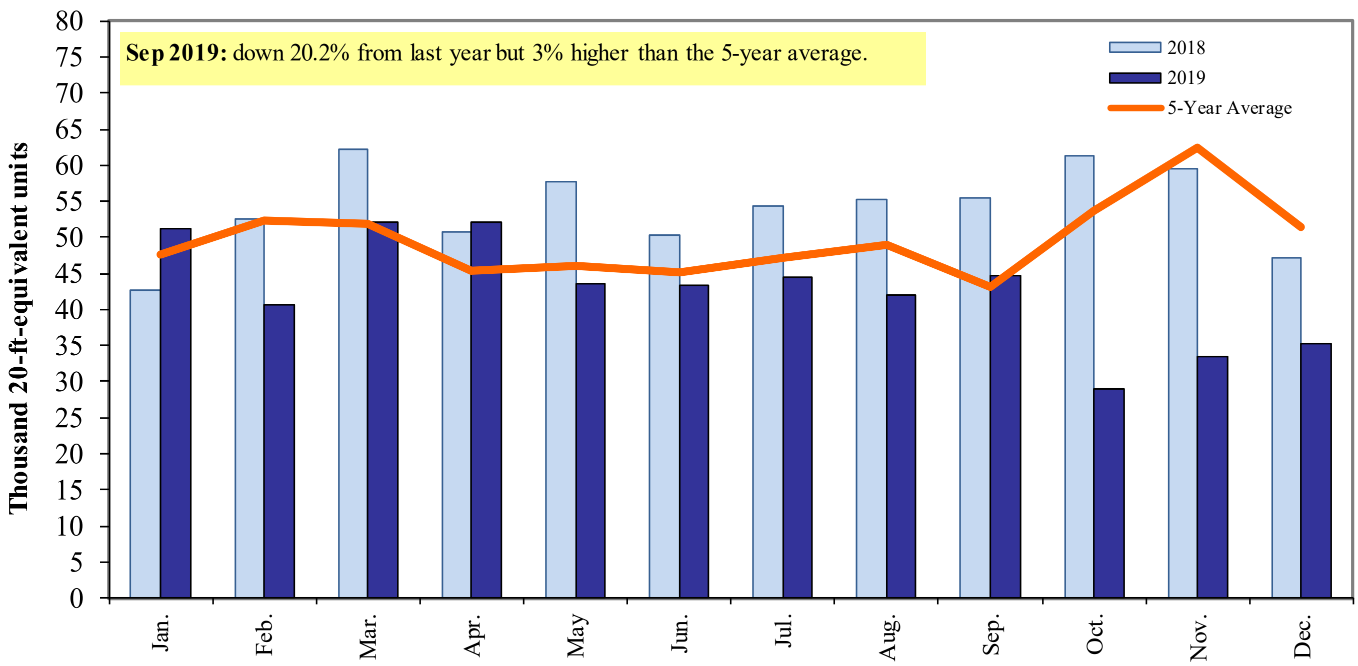
Figure 18
Top 10 destination markets for U.S. containerized grain exports, 2019



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, 1201, 120100, 120190, 120810, 230210, 230310, 230330, and 230990.

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

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