United States Department of Agriculture

Grain Transportation Report

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

Contact Us

April 30, 2020

Contents

The next release is May 7, 2020

WEEKLY HIGHLIGHTS

Ocean Freight Rates Continue To Drop

Since the beginning of January, ocean freight rates for shipping bulk commodities (including grains) have continued to drop, mirroring the slump in global bulk trade. In the week ending April 23, shipping bulk grain from the U.S. Gulf to Japan cost $37.25 per metric ton (mt)—a 19-percent drop from the first available rate on January 2. Also, in the week ending April 23, shipping from the Pacific Northwest (PNW) to Japan cost $19.25 per mt—23 percent less than on January 2. Despite rallying slightly between February 13 and March 5, rates have continued to decline since then. The slump in the global dry bulk results from recent supply chain disruptions around the globe (see April 16, *Grain Transportation Report*).

Corn Boosts Total Grain Inspections

For the week ending April 23, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.17 million metric tons (mmt). Total grain inspections were up 21 percent from the previous week, down 15 percent from last year, and down 17 percent from the 3-year average. With a sharp increase in week to week Asia-destined corn inspections, total corn inspections rose 54 percent. Total wheat inspections decreased 1 percent from the previous week, and soybeans increased 1 percent. Total grain inspections jumped 62 percent in PNW and increased 7 percent in the Mississippi Gulf.

FMC Published Interpretive Rule on Detention and Demurrage

On April 28, the Federal Maritime Commission (FMC) published Docket No. 19-05, *Interpretive Rule on Demurrage and Detention under the Shipping Act.* The interpretive rule provides guidance regarding what FMC "may consider in assessing whether a demurrage or detention practice is unjust or unreasonable." The rule followed years of complaints that unfair detention and demurrage practices by ocean carriers and terminal operators unfairly penalized U.S. importers, exporters, transportation intermediaries, and drayage truckers for circumstances outside their control.

Snapshots by Sector

Export Sales

For the week ending April 16, **unshipped balances** of wheat, corn, and soybeans totaled 22.6 million metric tons (mmt). This represented a 26-percent decrease in outstanding sales, compared to the same time last year. Net **corn export sales** were 0.727 mmt, down 20 percent from the past week. Net **soybean export sales** were 0.345 mmt, up 41 percent from the previous week. Net weekly **wheat export sales** were 0.245 mmt, up 37 percent from the previous week.

Rail

U.S. Class I railroads originated 20,690 **grain carloads** during the week ending April 18. This was a 7-percent decrease from the previous week, 16 percent less than last year, and 14 percent lower than the 3-year average.

Average May shuttle **secondary railcar** bids/offers (per car) were $110 below tariff for the week ending April 23. This was $63 less than last week and $202 lower than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending April 25, **barge grain movements** totaled 662,000 tons. This was 0.4 percent more than the previous week and 56 percent more than the same period last year.

For the week ending April 25, 419 grain barges **moved down river**—6 more barges than the previous week. There were 613 grain barges **unloaded in New Orleans**, 16 percent more than the previous week.

Ocean

For the week ending April 23, 35 **oceangoing grain vessels** were loaded in the Gulf—3 percent more than the same period last year. Within the next 10 days (starting April 24), 43 vessels were expected to be loaded—8 percent fewer than the same period last year.

Fuel

For the week ending April 27, the U.S. average **diesel fuel price** decreased 4.3 cents from the previous week to $2.437 per gallon, 73.2 cents below the same week last year.

Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* April 30, 2020.
Web: http://dx.doi.org/10.9752/TS056.04-30-2020

Feature Article/Calendar

Date	Event	Online/In-Person	Website for More Information
	The following list contains information and links to upcoming events, most of which are online or virtual.		
May 5	**Maritime London COVID-19 Webinar Series** The live webinar will explore how English shipping law has responded to the COVID-19 crisis.	Online	https://www.maritimelondon.com/maritime-london-events
May 6	**Maritime London COVID-19 Webinar Series** The live webinar will explore how ship finance providers are responding to challenges emerging from the pandemic-related economic slowdown.	Online	https://www.maritimelondon.com/maritime-london-events
May 6	**ESRI Transportation Webinar Series:** **"Manage Your Berths and Channels With GIS Data"** This webinar from the the Environmental Systems Research Institute (ESRI) highlights how bathymetric Geographic Information Systems (GIS) data can be leveraged for better analysis, informing the planning of berths and harbor terminals. The webinar shows how these GIS data can be a vital part of your port's digital information strategy.	Online	https://register.gotowebinar.com/register/5366154810826322444
May 7	**TRF Webinar: "E-Scooters, Panama Canal, and More: Four Mini-Presentations - Notable Presentations from the 61st Annual Forum"** The Transportation Research Forum (TRF) is holding a 1-hour webinar with four presentations, including "Ethical Concerns in Emerging Transportation Industries" and "The Impact of the Panama Canal Expansion on Potential Logistics Developments and the Economy."	Online	https://trforum.org/events/#!event/2020/5/7/webinar-e-scooters-panama-canal-and-more-four-mini-presentations-notable-presentations-from-the-61st-annual-forum
May 5-7	**FreightWaves Live Atlanta Meeting** FreightWaves—a data and content forum—is holding its upcoming Atlanta Meeting online this year. The meeting will have online sessions on May 5 from 9 a.m.- 4:30 p.m., May 6 from 9 a.m. - 5 p.m., and May 7 from 9 a.m. - 4 p.m. Experts will address the latest trends affecting freight and transportation and also discuss their experiences and strategies to navigate current markets.	Online	https://www.freightwaves.com/live-home
May 19	**JOC Webcasts: Leveraging Supply Chain Visibility in a Crisis** Industry experts hosted by *Journal of Commerce* (JOC) will discuss what it takes to prepare for and deal with critical supply chain disruptions. Topics covered will include building supply-chain contingency plans, planning for unexpected shifts in demand, and leveraging digitization to mitigate risks.	Online	https://www.joc.com/webcasts
May 20-21	**AgTC Virtual Annual Meeting** The Agriculture Transportation Coalition (AgTC) is holding its 32nd Annual Meeting virtually this year. The trade association will host two 2-hour online sessions over 2 days.	Online	https://agtrans.org/events/
June 22	**25th Annual AAR Research Review** The Association of American Railroads' (AAR) Transportation Technology Center, Inc. will present and discuss the industry's key research of the past year.	Online	https://www.aar.org/25th-annual-aar-research-review-webinar/
July 26-28	**Agricultural and Applied Economics Association Annual Meeting** The Agricultural and Applied Economics Association (AAEA) holds its annual meeting on topics related to agricultural and resource economics. This year's meeting will be in Kansas City, MO.	In-Person	https://www.aaea.org/meetings/2020-aaea-annual-meeting
Aug. 11-12	**Bridging Transportation Researchers Online Conference** This is a 2-day conference with multi-track Zoom-based meetings addressing topics in a multitude of transportation-related areas, including multimodal transportation network and systems, freight transportation and logistics, transportation safety and security, and more.	Online	https://bridgingtransport.wordpress.com/
Aug. 26-27	**Sustainable Fleet Technology Conference and Expo** Duke University in Durham, NC, hosts a 2-day event showcasing recent opportunities for biofuel, electric, natural gas, and propane fuels and fueling. The conference has a strong focus on data-driven decisions, tools, and technologies.	In-Person	https://energy.duke.edu/events/sustainable-fleet-technology-conference-expo
Aug 26-28	**cmdtyExchange Grain Summit 2020** This is a 3-day, in-person event held in Chicago focusing on issues and innovations affecting agricultural commodity markets. The agenda includes a presentation by USDA's Agricultural Marketing Service on the new Agricultural Transportation Open Data Platform: https://agtransport.usda.gov/.	In-Person	https://www.barchart.com/cmdty/resources/events/exchange2020

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit train	Shuttle		Gulf	Pacific
04/29/20	164	n/a	219	151	167	137
04/22/20	166	n/a	222	157	171	140

[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	4/24/2020	4/17/2020
Corn	IL–Gulf	-0.63	-0.68
Corn	NE–Gulf	-0.86	-0.89
Soybean	IA–Gulf	-0.92	-0.98
HRW	KS–Gulf	-2.03	-2.08
HRS	ND–Portland	-2.15	-2.17

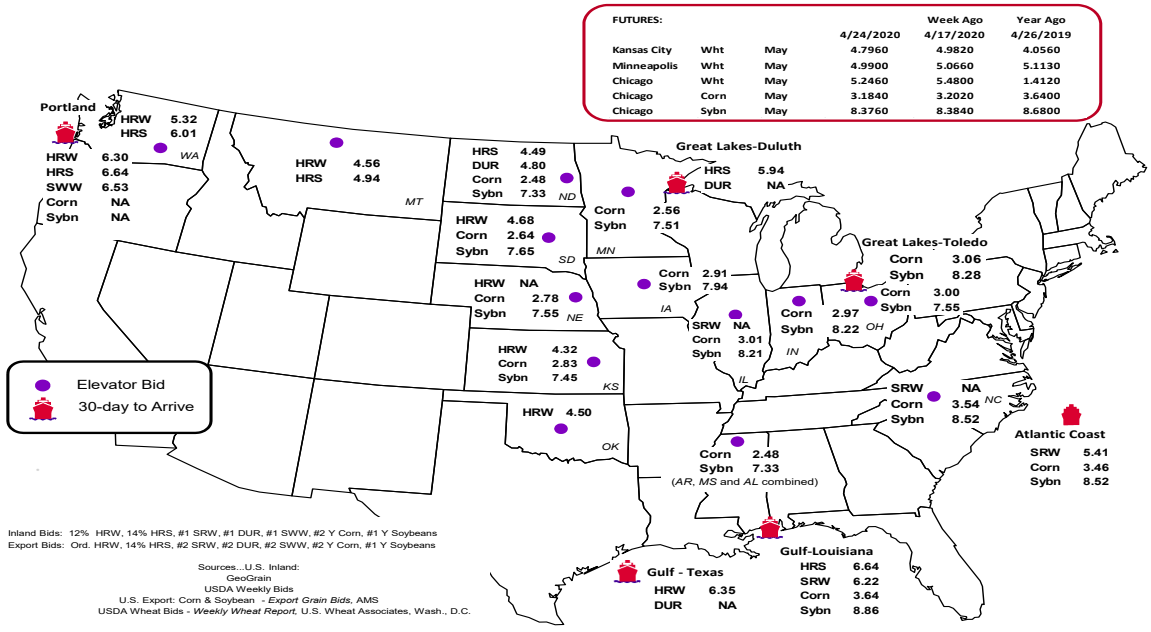
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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]
4/22/2020[p]	624	767	6,018	207	7,616	4/18/2020	1,798
4/15/2020[r]	949	657	4,982	166	6,754	4/11/2020	3,105
2020 YTD[r]	6,776	11,375	75,351	3,469	96,971	2020 YTD	37,904
2019 YTD[r]	13,865	19,655	96,109	6,124	135,753	2019 YTD	36,109
2020 YTD as % of 2019 YTD	49	58	78	57	71	% change YTD	105
Last 4 weeks as % of 2019[2]	57	47	81	64	72	Last 4wks. % 2019	116
Last 4 weeks as % of 4-year avg.[2]	148	48	87	49	81	Last 4wks. % 4 yr.	111
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.

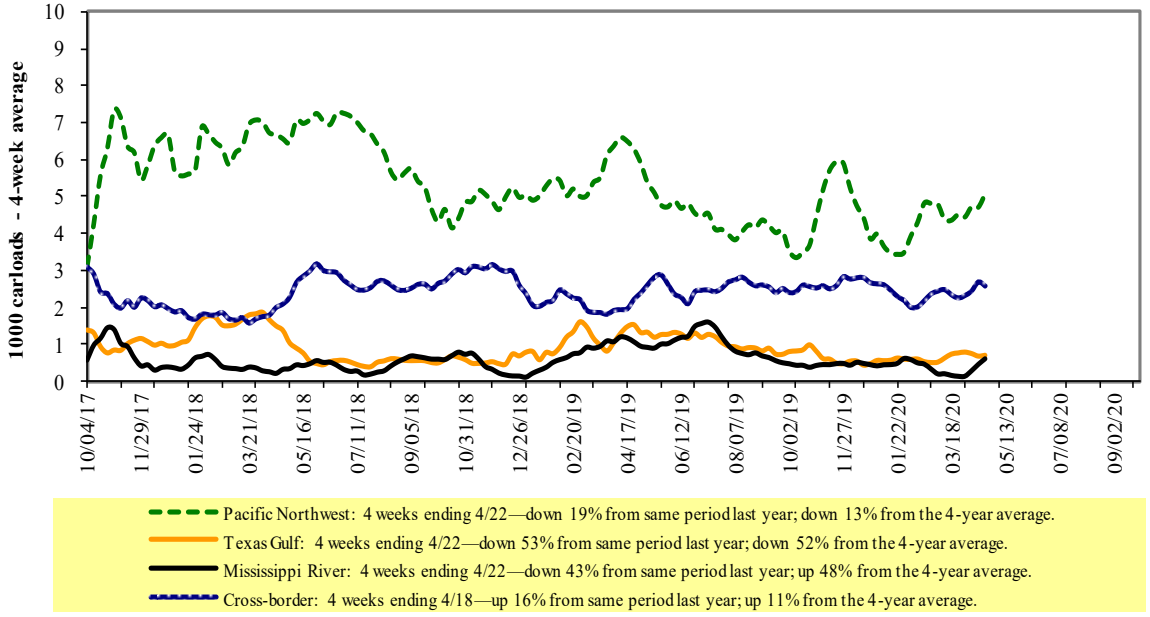
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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:	East		West			U.S. total	Canada	
4/18/2020	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,937	2,024	10,862	884	4,983	20,690	4,174	5,106
This week last year	1,906	2,934	13,337	851	5,654	24,682	5,468	4,716
2020 YTD	27,560	36,742	169,391	17,096	73,979	324,768	59,433	64,178
2019 YTD	31,610	43,301	170,957	18,159	81,596	345,623	69,002	67,429
2020 YTD as % of 2019 YTD	87	85	99	94	91	94	86	95
Last 4 weeks as % of 2019*	83	83	100	89	95	95	89	98
Last 4 weeks as % of 3-yr. avg.**	87	87	92	109	92	92	105	102
Total 2019	91,611	137,080	568,369	58,527	260,269	1,115,856	212,537	235,892

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

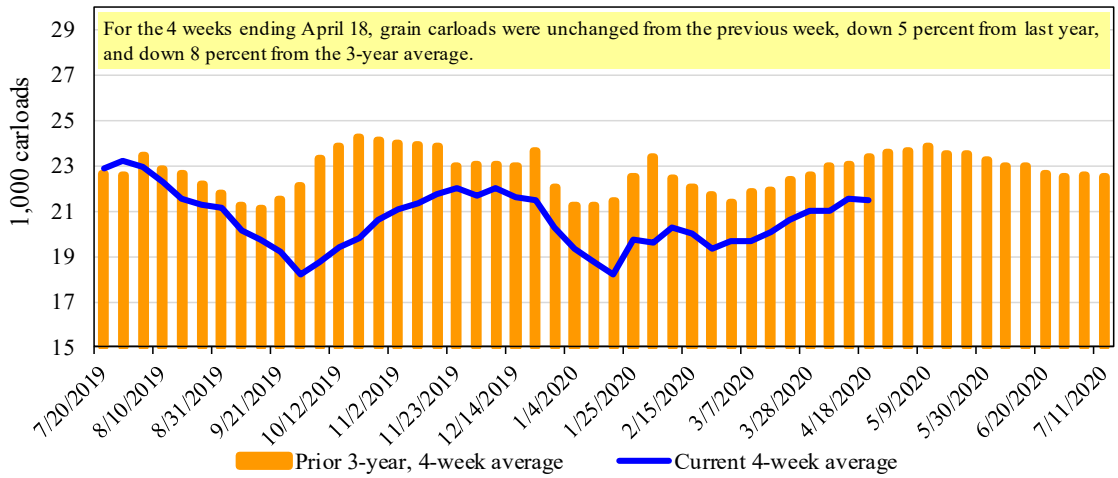
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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:		Delivery period							
4/23/2020		May-20	May-19	Jun-20	Jun-19	Jul-20	Jul-19	Aug-20	Aug-19
BNSF[3]	COT grain units	0	no offer	no bids	15	no bids	0	no bids	19
	COT grain single-car	0	no offer	0	326	0	201	0	159
UP[4]	GCAS/Region 1	10	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no bid	no offer	no bid	no offer	no bid	no offer	n/a	n/a

[1]Auction offerings are for single-car and unit train shipments only.

[2]Average premium/discount to tariff, last auction. n/a = not available.

[3]BNSF - COT = 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.

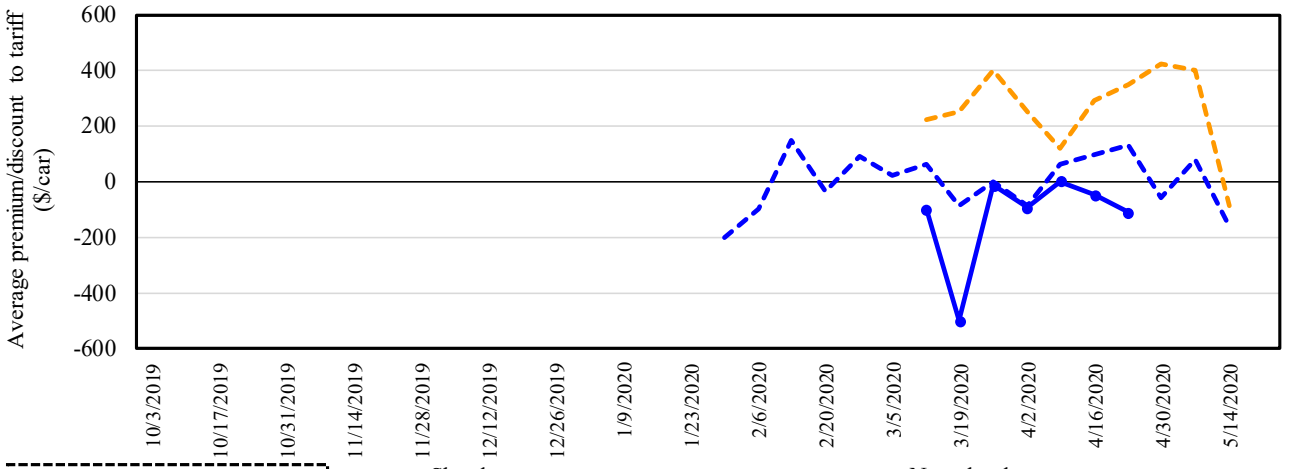
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 May 2020, secondary market

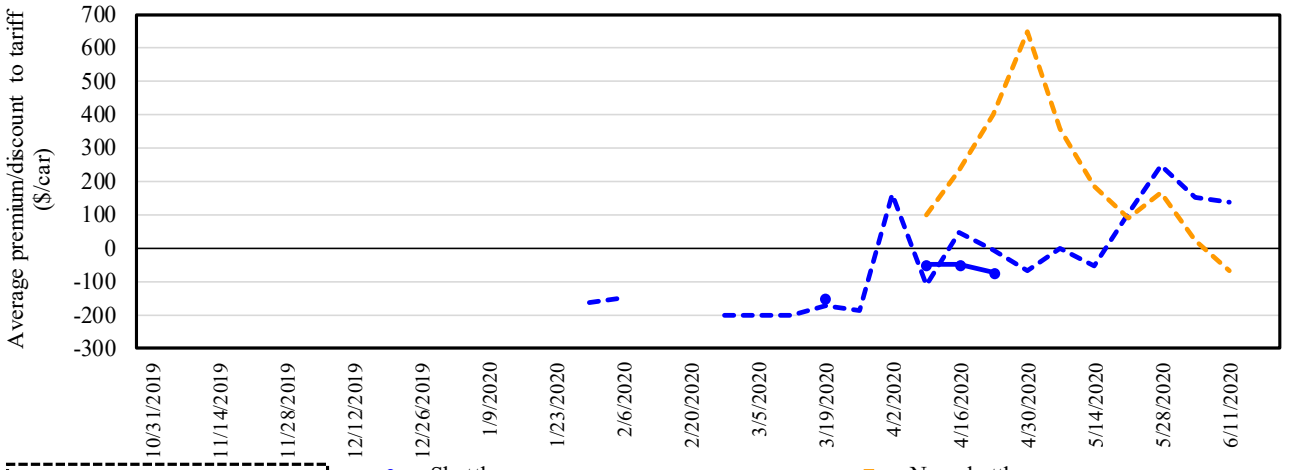


4/23/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$58	-$163

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $63 this week and are $110 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 June 2020, secondary market



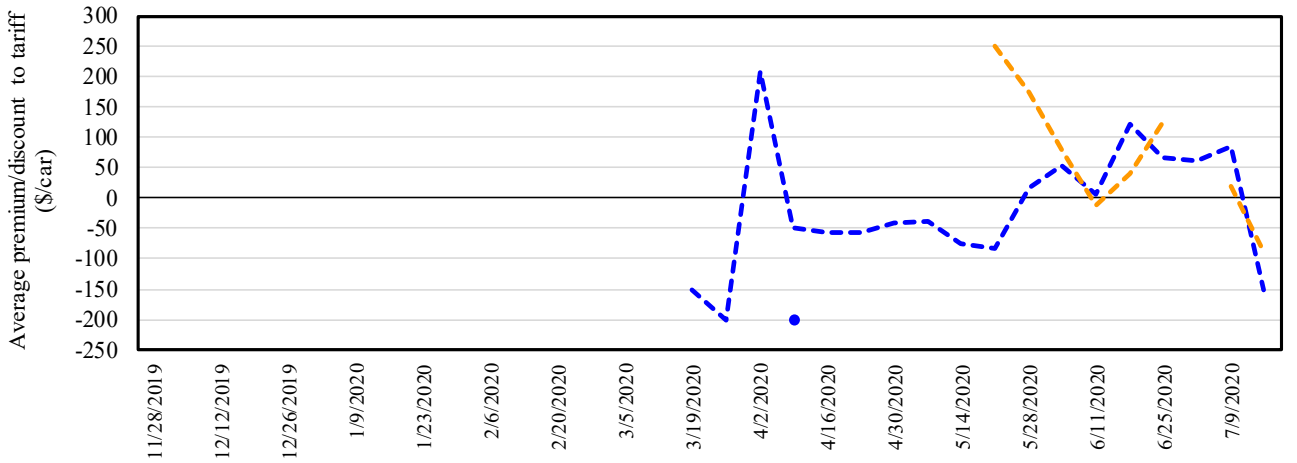
4/23/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	n/a	-$75

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $25 this week and are $25 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 July 2020, secondary market



4/23/2020	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: 4/23/2020		Delivery period					
		May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-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**	**(58)**	**n/a**	**n/a**	**n/a**	**(50)**	**n/a**
	Change from last week	13	n/a	n/a	n/a	n/a	n/a
	Change from same week 2019	(129)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**(163)**	**(75)**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(138)	(25)	n/a	n/a	n/a	n/a
	Change from same week 2019	(275)	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]	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.

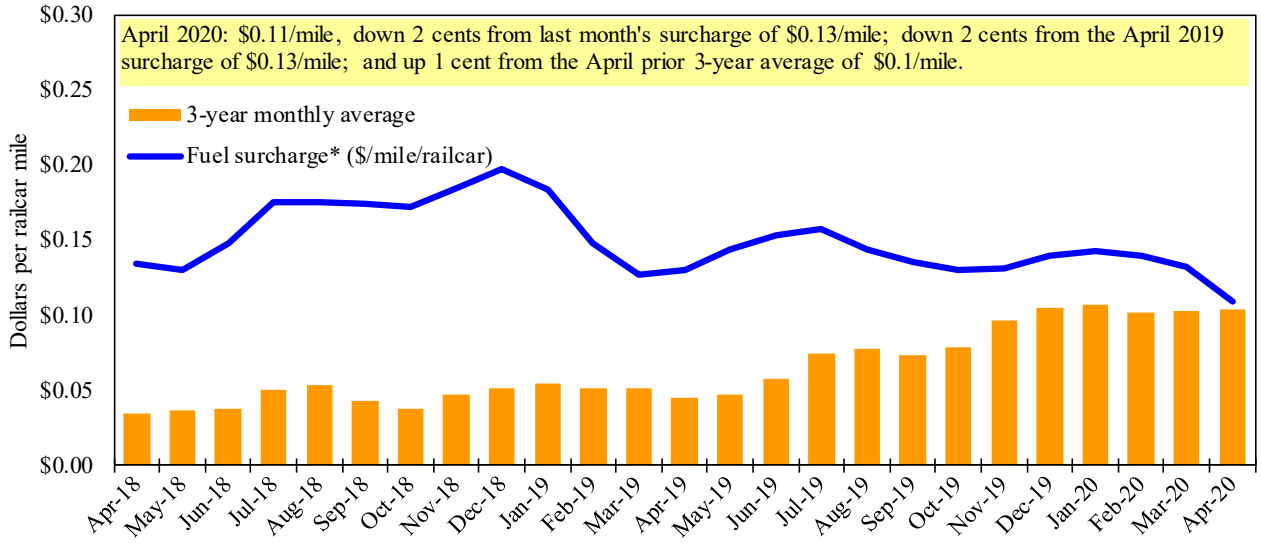
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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.

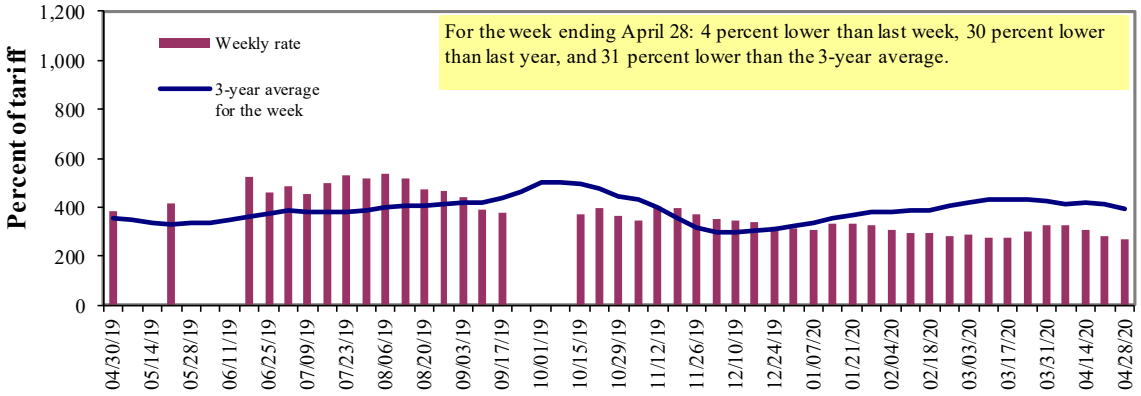
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.

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]	4/28/2020	335	278	271	175	188	188	173
	4/21/2020	346	296	283	181	195	195	175
$/ton	4/28/2020	20.74	14.79	12.57	6.98	8.82	7.60	5.43
	4/21/2020	21.42	15.75	13.13	7.22	9.15	7.88	5.50
Current week % change from the same week:								
	Last year	-	-	-30	-36	-32	-32	-34
	3-year avg. [2]	-27	-31	-31	-42	-43	-43	-39
Rate[1]	May	333	278	276	178	188	188	173
	July	336	285	-	189	194	194	179

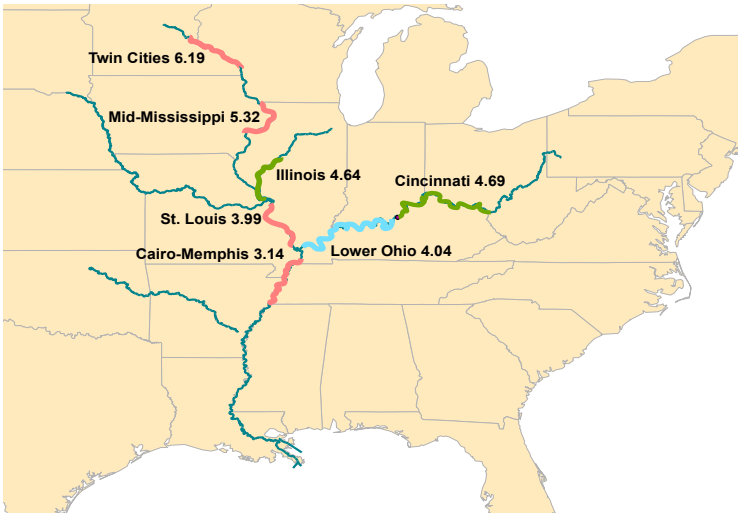
[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds; "-" not available due to closure.

Source: USDA, Agricultural Marketing Service.

Figure 9
Benchmark tariff rates

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

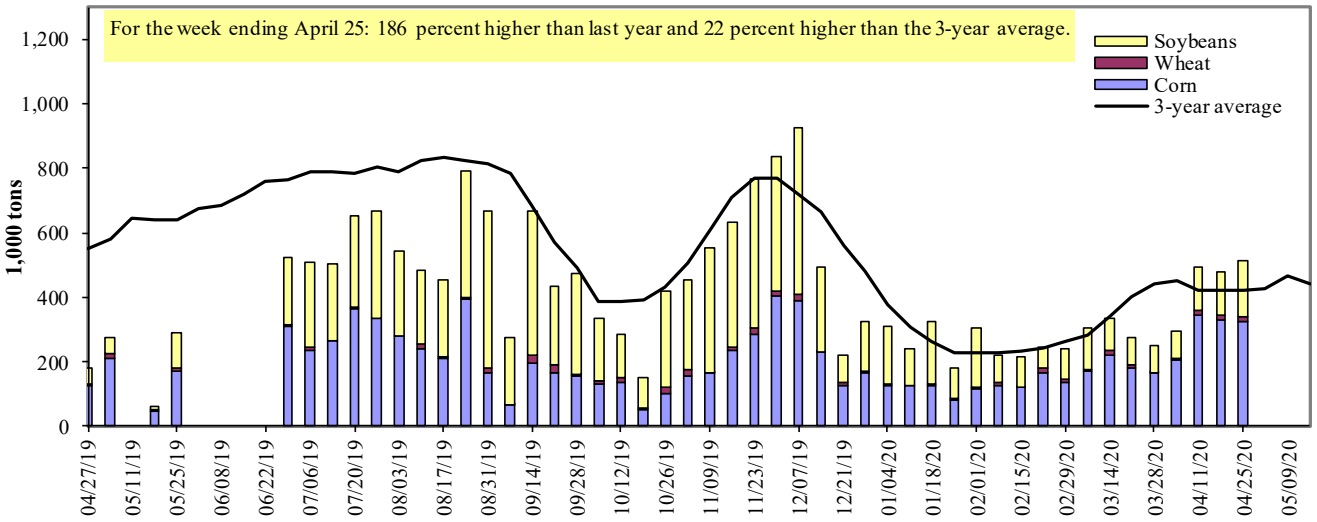
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 04/25/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	88	0	59	0	147
Winfield, MO (L25)	215	2	130	0	346
Alton, IL (L26)	350	17	187	0	554
Granite City, IL (L27)	325	15	172	0	513
Illinois River (La Grange)	120	11	73	0	203
Ohio River (Olmsted)	58	0	44	5	108
Arkansas River (L1)	0	18	24	0	42
Weekly total - 2020	383	34	241	5	662
Weekly total - 2019	244	33	147	0	424
2020 YTD[1]	4,786	523	3,577	19	8,905
2019 YTD[1]	3,987	763	3,166	46	7,962
2020 as % of 2019 YTD	120	69	113	41	112
Last 4 weeks as % of 2019[2]	135	73	144	65	132
Total 2019	12,780	1,631	14,683	154	29,247

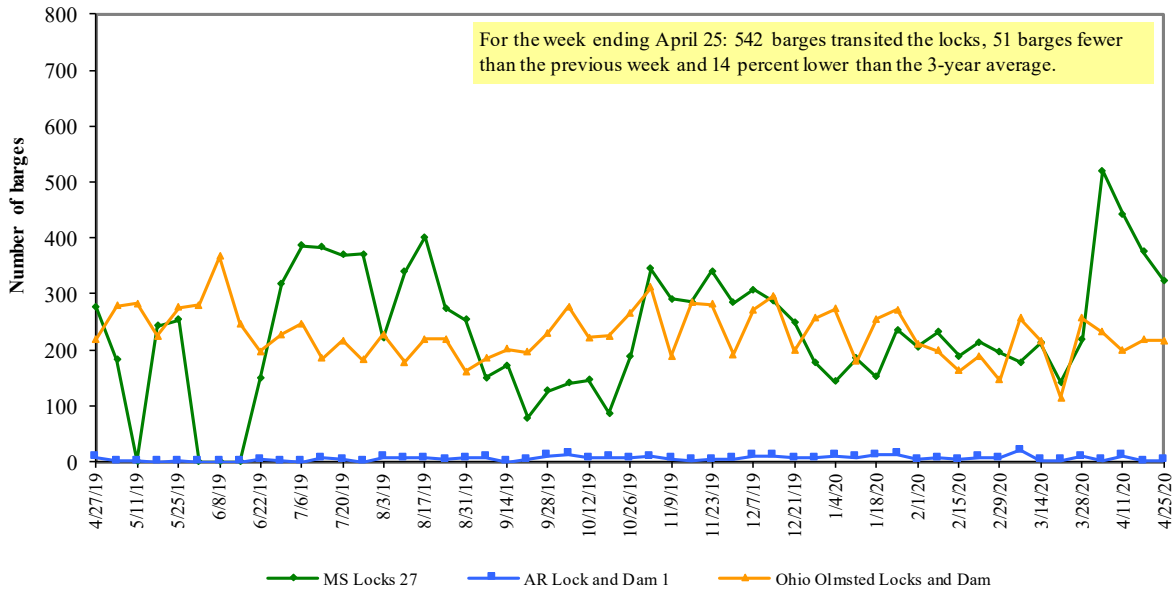
[1] Weekly total, YTD (year-to-date), and calendar year total include MS/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. L (as in "L15") refers to a lock or lock and dam facility. Olmsted = Olmsted Locks and Dam. La Grange = La Grange Lock and Dam.

[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

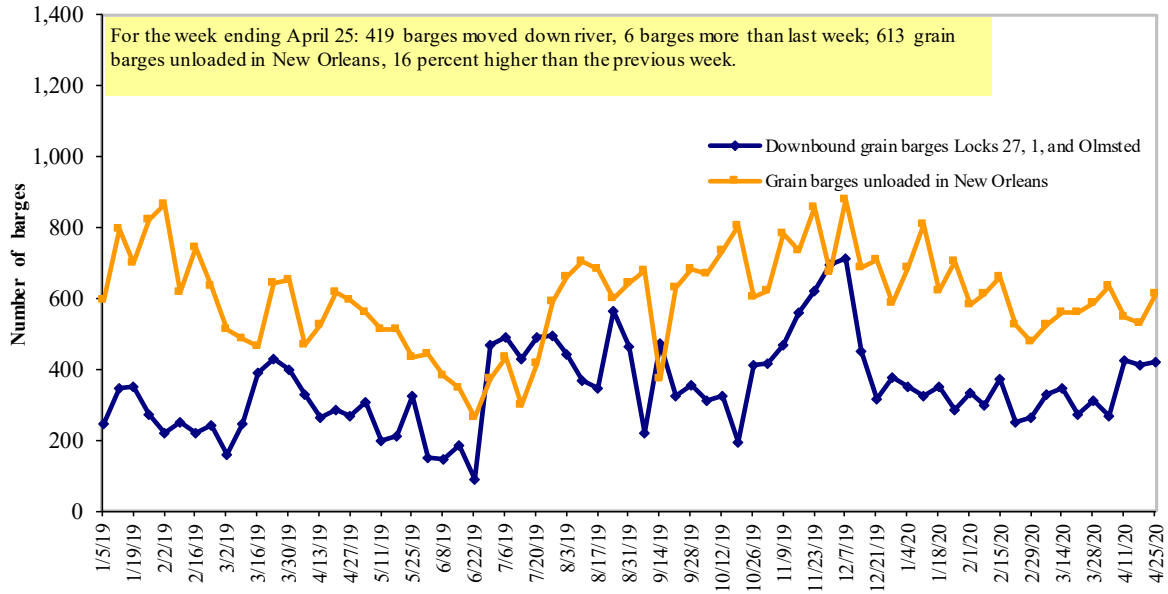
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 4/27/2020 (U.S. $/gallon)

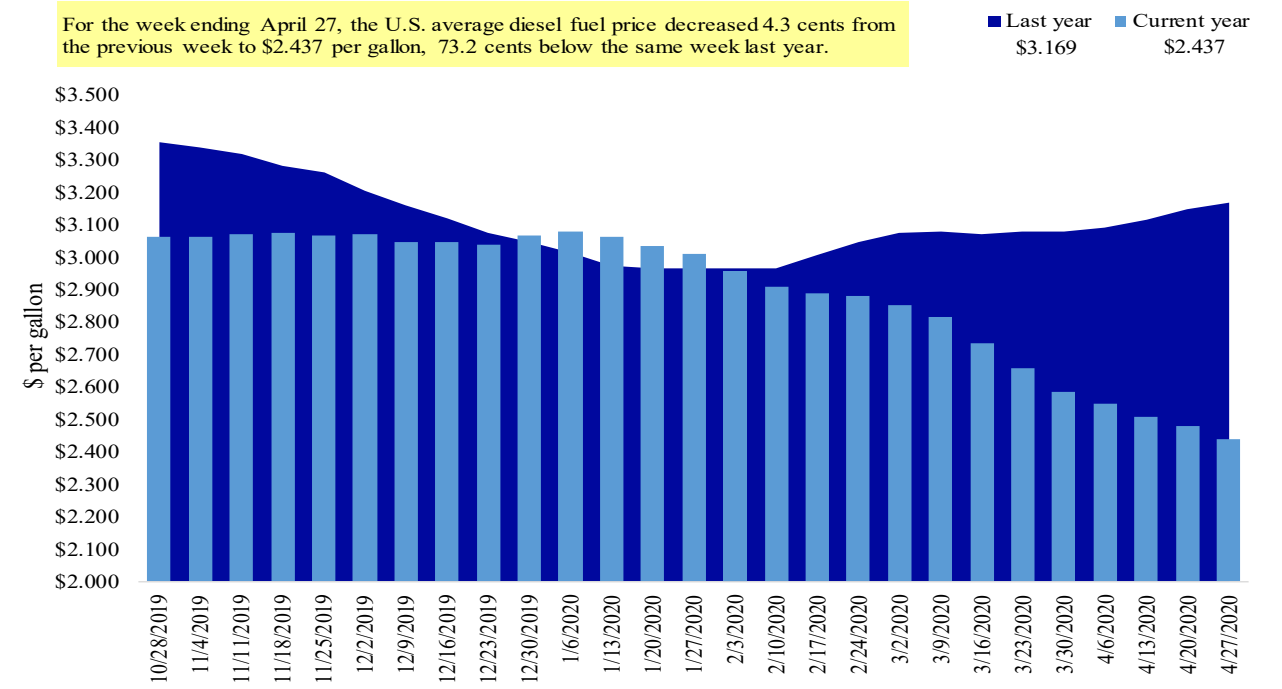
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.545	-0.031	-0.649
	New England	2.677	-0.032	-0.559
	Central Atlantic	2.711	-0.036	-0.674
	Lower Atlantic	2.406	-0.028	-0.651
II	Midwest	2.287	-0.039	-0.771
III	Gulf Coast	2.208	-0.064	-0.731
IV	Rocky Mountain	2.434	-0.037	-0.749
V	West Coast	2.934	-0.040	-0.796
	West Coast less California	2.593	-0.047	-0.753
	California	3.214	-0.034	-0.821
Total	United States	2.437	-0.043	-0.732

[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]									
4/16/2020	1,501	257	1,269	840	179	4,046	13,740	4,800	22,585
This week year ago	2,366	772	1,136	905	67	5,245	11,974	13,128	30,347
Cumulative exports-marketing year[2]									
2019/20 YTD	8,135	2,140	6,153	4,250	741	21,419	21,650	33,175	76,243
2018/19 YTD	6,839	2,567	5,797	4,476	416	20,095	33,497	31,696	85,287
YTD 2019/20 as % of 2018/19	119	83	106	95	178	107	65	105	89
Last 4 wks. as % of same period 2018/19*	71	35	126	109	318	87	116	38	77
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 4/16/2020	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 -			
Mexico	12,257	14,574	(16)	14,659
Japan	7,861	10,069	(22)	11,955
Korea	1,770	3,618	(51)	4,977
Colombia	3,361	3,898	(14)	4,692
Peru	36	1,995	(98)	2,808
Top 5 importers	**25,284**	**34,154**	**(26)**	**39,091**
Total U.S. corn export sales	**35,390**	**45,471**	**(22)**	**54,024**
% of projected exports	81%	87%		
Change from prior week[2]	**727**	**780**		
Top 5 importers' share of U.S. corn export sales	71%	75%		72%
USDA forecast April 2020	**43,893**	**52,545**	**(16)**	
Corn use for ethanol USDA forecast, April 2020	**128,270**	**136,601**	**(6)**	

[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 4/16/2020	Total commitments[2] 2019/20 current MY	Total commitments[2] 2018/19 last MY*	% change current MY from last MY	Exports[3] 3-yr. avg. 2016-18
	- 1,000 mt -			- 1,000 mt -
China	12,634	13,134	(4)	25,733
Mexico	4,103	4,659	(12)	4,271
Indonesia	1,614	1,824	(11)	2,386
Japan	2,120	2,142	(1)	2,243
Egypt	2,505	2,302	9	1,983
Top 5 importers	**22,977**	**24,060**	**(5)**	**36,616**
Total U.S. soybean export sales	**37,975**	**34,824**	**9**	**53,746**
% of projected exports	79%	73%		
change from prior week[2]	**345**	**(9,404)**		
Top 5 importers' share of U.S. soybean export sales	61%	69%		**68%**
USDA forecast, April 2020	**48,365**	**47,629**	**102**	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2018/19; marketing year (MY) = Sep 1 - Aug 31.
[2]Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include 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 4/16/2020	Total commitments[2] 2019/20 current MY	Total commitments[2] 2018/19 last MY*	% change current MY from last MY	Exports[3] 3-yr. avg. 2016-18
	- 1,000 mt -			- 1,000 mt -
Philippines	3,275	3,087	6	3,047
Mexico	3,741	3,220	16	3,034
Japan	2,683	2,740	(2)	2,695
Nigeria	1,533	1,591	(4)	1,564
Indonesia	1,011	1,322	(24)	1,381
Korea	1,556	1,562	(0)	1,355
Taiwan	1,293	1,107	17	1,164
Egypt	101	815	(88)	821
Thailand	879	748	18	747
Iraq	262	616	(57)	574
Top 10 importers	**16,334**	**16,809**	(3)	**16,382**
Total U.S. wheat export sales	**25,464**	**25,340**	**0**	**24,388**
% of projected exports	95%	99%		
change from prior week[2]	**245**	**425**		
Top 10 importers' share of U.S. wheat export sales	64%	66%		67%
USDA forecast, April 2020	**26,839**	**25,504**	**5**	

[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 04/23/20	Previous week*	Current week as % of previous	2020 YTD*	2019 YTD*	2020 YTD as % of 2019 YTD	Last 4-weeks as % of: Last year	Last 4-weeks as % of: Prior 3-yr. avg.	2019 total*
Pacific Northwest									
Wheat	267	328	81	5,044	4,439	114	97	97	13,961
Corn	419	1	n/a	2,302	4,287	54	55	49	7,047
Soybeans	76	141	54	2,423	4,018	60	52	62	11,969
Total	**762**	**469**	**162**	**9,769**	**12,745**	**77**	**71**	**69**	**32,977**
Mississippi Gulf									
Wheat	115	103	111	1,251	1,715	73	68	73	4,448
Corn	514	531	97	9,031	9,199	98	100	85	20,763
Soybeans	408	333	122	8,307	8,455	98	110	103	31,398
Total	**1,037**	**968**	**107**	**18,589**	**19,369**	**96**	**100**	**88**	**56,609**
Texas Gulf									
Wheat	38	13	286	1,154	2,106	55	38	46	6,009
Corn	31	14	224	213	244	87	77	87	640
Soybeans	0	0	n/a	7	0	n/a	n/a	n/a	2
Total	**69**	**27**	**254**	**1,373**	**2,349**	**58**	**43**	**52**	**6,650**
Interior									
Wheat	44	44	99	786	544	144	109	132	1,987
Corn	96	140	68	2,448	2,295	107	97	88	7,857
Soybeans	80	101	80	2,254	2,162	104	69	79	7,043
Total	**219**	**285**	**77**	**5,487**	**5,001**	**110**	**87**	**89**	**16,887**
Great Lakes									
Wheat	64	44	145	110	110	99	136	147	1,339
Corn	0	0	n/a	0	0	n/a	n/a	0	11
Soybeans	8	0	n/a	8	43	20	32	32	493
Total	**73**	**44**	**164**	**118**	**153**	**77**	**110**	**108**	**1,844**
Atlantic									
Wheat	0	0	n/a	1	32	2	2	6	37
Corn	0	0	n/a	0	49	0	0	0	99
Soybeans	12	5	224	329	440	75	50	30	1,353
Total	**12**	**5**	**224**	**330**	**522**	**63**	**35**	**25**	**1,489**
U.S. total from ports*									
Wheat	528	533	99	8,345	8,947	93	79	86	27,781
Corn	1,059	686	154	13,993	16,074	87	85	74	36,417
Soybeans	585	580	101	13,328	15,118	88	83	84	52,258
Total	**2,172**	**1,799**	**121**	**35,665**	**40,139**	**89**	**83**	**79**	**116,457**

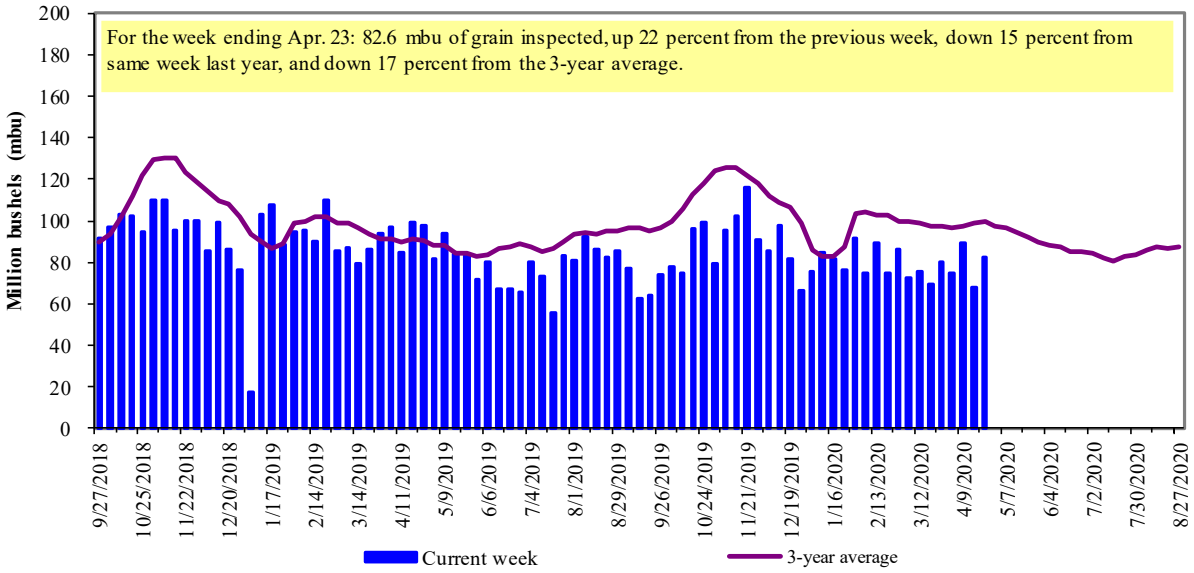
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

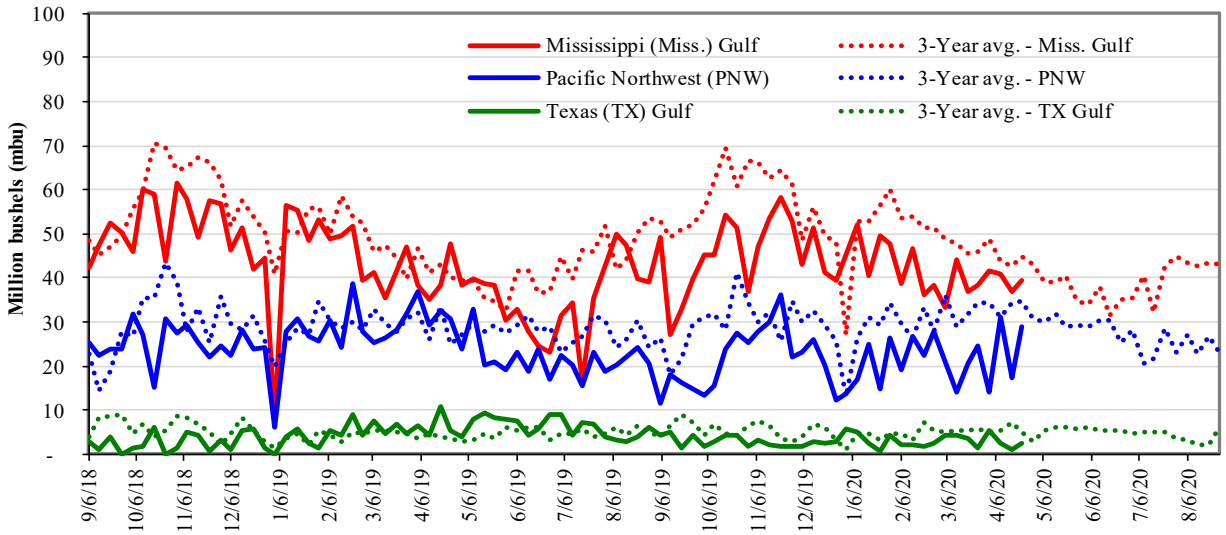


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 04/23/20 inspections (mbu):	
MS Gulf:	39.5
PNW:	29.1
TX Gulf:	2.6

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	up 7	up 153	up 11	up 69
Last Year (same wk):	down 17	down 50	down 20	down 6
3-yr avg. (4-wk. mov. Avg):	down 12	down 53	down 17	down 13

Source: USDA, Federal Grain Inspection Service.

Table 17

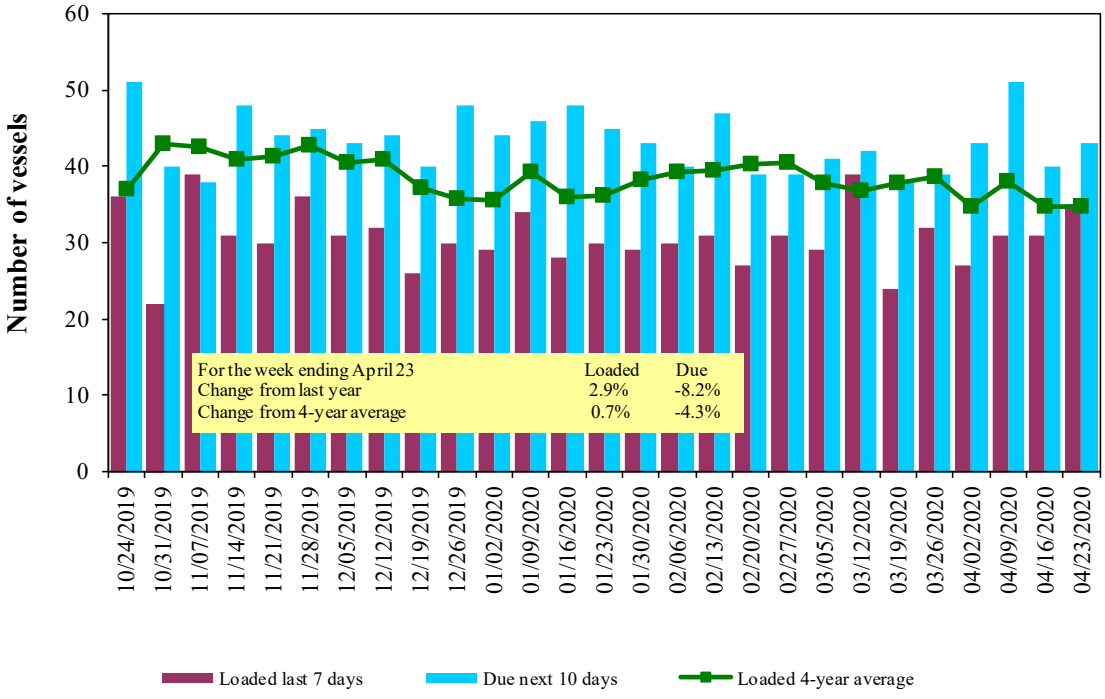
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
4/23/2020	31	35	43	18
4/16/2020	34	31	40	7
2019 range	(26…61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service.

Figure 16

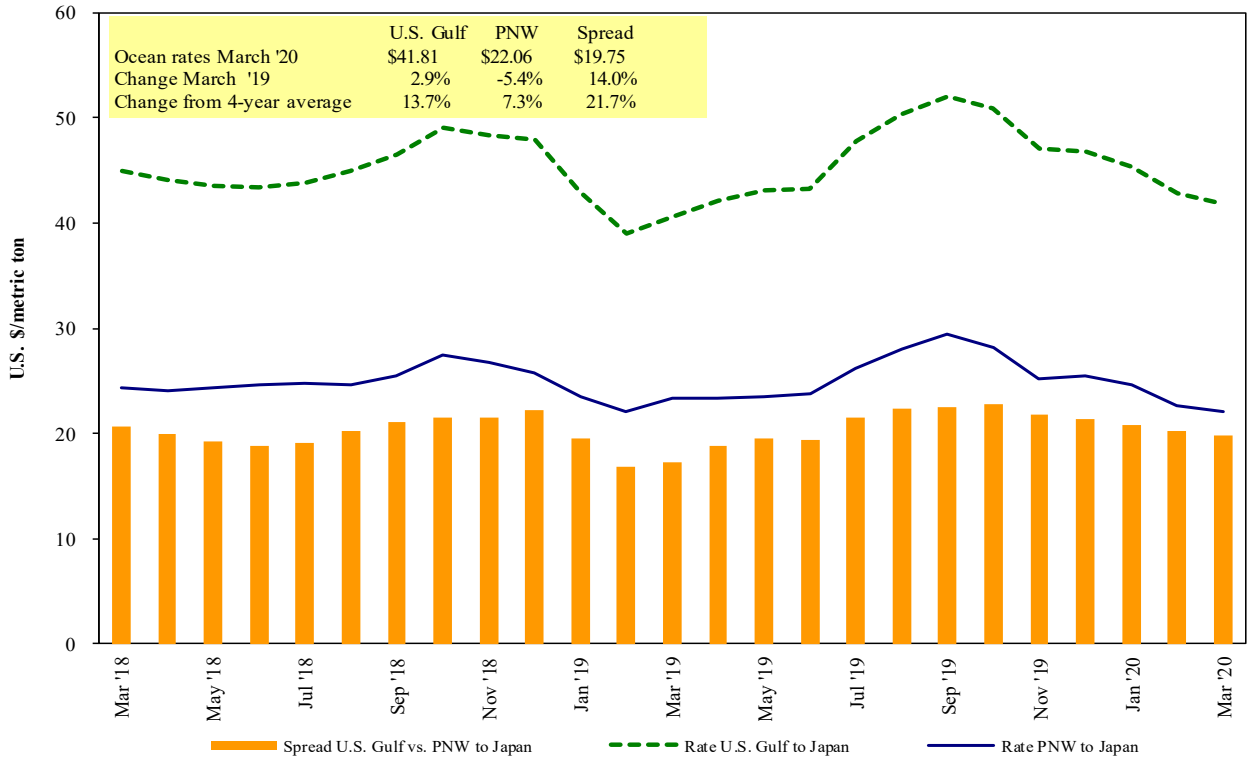
U.S. Gulf[1] vessel loading activity



[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 04/25/2020

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Djibouti	Wheat	Jun 5/15	30,000	131.75*
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	May 4/14	49,630	36.50
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	SE Asia	Corn	Jul 1/6	66,000	22.75
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

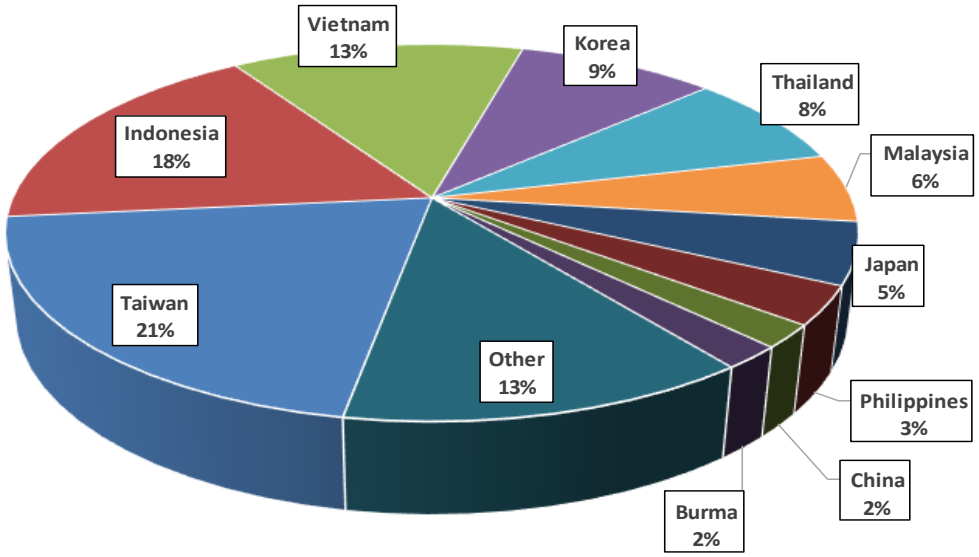
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

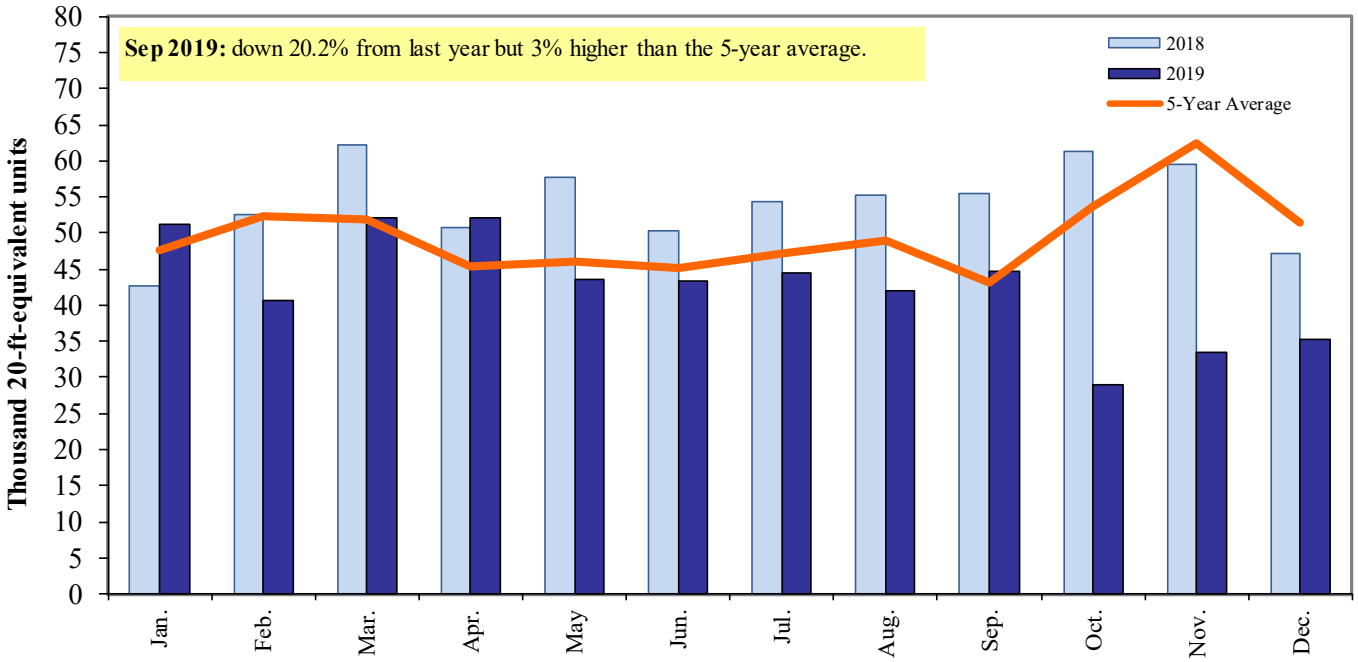
Figure 18
Top 10 destination markets for U.S. containerized grain exports, 2019



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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Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* April 30, 2020. Web: **http://dx.doi.org/10.9752/TS056.04-30-2020**

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