USDA United States Department of Agriculture

Grain Transportation Report

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

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May 7, 2020

Contents

The next release is May 14, 2020

WEEKLY HIGHLIGHTS

Diesel Fuel Prices Continue To Fall Amid Historic Drop in Crude Oil Futures Prices

For the week ending May 4, the U.S. average **diesel fuel price** decreased 3.8 cents from the previous week to $2.399 per gallon, 77.2 cents below the same week last year. Since mid-January diesel prices have fallen 68 cents. So far this year, March has shown the largest drop in monthly prices—a decline of nearly 30 cents per gallon in the 5-week month. April diesel prices fell nearly 15 cents per gallon, responding in part to a historic drop in futures prices for crude oil, which traded in the negative for the first time since 1983. According to the U.S. Department of Energy, the sharp decline in U.S. consumption of crude oil and petroleum products has led to an excess of imported and domestically produced crude oil volumes. The excess volumes have filled U.S. storage to near capacity and put downward pressure on prices.

ATRI and OIDA Release Report on COVID-19's Effects on Trucking

The American Trucking Research Institute and the Owner-Operator Independent Driver Association Foundation (OOIDA) jointly released a report on the effects of coronavirus disease (COVID-19) on all trucking operations. Based on an April survey of ATRI and OOIDA membership, the report provides recommendations and guidance on future strategies in the event of another national disaster. Some of the report's key findings include the following: (1) a significant decline in long haul trips, resulting from a decrease in container imports at ports; (2) a more than doubling of local trips under 100 miles; (3) increased difficulty for large fleets and owner-operators in finding truck parking; (4) negative impacts on almost 70 percent of specialized and tank truck operations, with small fleets feeling the effects more than large fleets (e.g., much worse detention delays for small fleets than for large fleets).

Grain Inspections Down Slightly; Texas Gulf Rebounds

For the week ending April 30, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions were 2.1 million metric tons (mmt). Total grain inspections were down 4 percent from the previous week, down 2 percent from last year, and down 18 percent from the 3-year average. Inspections increased 6 percent for wheat and 13 percent corn. The increases, however, could not offset the 43-percent drop in soybean inspections, due to lower shipments to Asia and Latin America. Grain inspections increased 7 percent in the Pacific Northwest (PNW), but decreased 19 percent in the Mississippi Gulf. Despite the drop in overall inspections, Texas Gulf inspections jumped 80 percent, reflected by a 132-percent increase in Texas Gulf rail deliveries of grain to port. The increase in rail deliveries of grain was the highest since early April of last year.

Snapshots by Sector

Export Sales

For the week ending April 23, **unshipped balances** of wheat, corn, and soybeans totaled 23.4 million metric tons (mmt). This represented a 19-percent decrease in outstanding sales, compared to the same time last year. Net **corn export sales** were 1.357 mmt, up 87 percent from the past week. Net **soybean export sales** were 1.078 mmt, up significantly from the previous week. Net weekly **wheat export sales** were 0.467 mmt, up 91 percent from the previous week.

Rail

U.S. Class I railroads originated 21,691 **grain carloads** during the week ending April 25. This was a 5-percent increase from the previous week, 14 percent less than last year, and 10 percent lower than the 3-year average.

Average May shuttle **secondary railcar** bids/offers (per car) were $149 below tariff for the week ending April 30. This was $39 less than last week and $59 lower than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending May 2, **barge grain movements** totaled 849,624 tons. This was 28 percent more than the previous week and 70 percent more than the same period last year.

For the week ending May 2, 534 grain barges **moved down river**—115 more barges than the previous week. There were 605 grain barges **unloaded in New Orleans**, 1 percent less than the previous week.

Ocean

For the week ending April 30, 36 **oceangoing grain vessels** were loaded in the Gulf—33 percent more than the same period last year. Within the next 10 days (starting May 1), 42 vessels were expected to be loaded—37 percent fewer than the same period last year.

As of April 30, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $36.00. This was 3 percent less than the previous week. The rate from PNW to Japan was $18.75 per mt, 3 percent less than the previous week.

Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* May 7, 2020.
Web: http://dx.doi.org/10.9752/TS056.05-07-2020

First-Quarter Wheat Transportation Costs Down; Landed Costs Up

During first quarter 2020, transportation costs for shipping wheat from Kansas (KS) and North Dakota (ND) to Japan decreased from the previous quarter (quarter to quarter). These costs decreased whether Japan-bound shipments went via the Pacific Northwest (PNW route) or the U.S. Gulf (Gulf route). A primary driver of the decline in transportation costs was the quarter-to-quarter drop in trucking and ocean freight rates. In contrast to these short-term declines, transportation costs for shipping wheat via both routes rose from the first quarter of 2019 (year to year) (tables 1 and 2). Higher wheat farm values contributed to the quarter-to-quarter increase in total landed costs for both routes. Total U.S. first-quarter wheat exports to Japan were down slightly year to year and from the 3-year average.

Transportation costs. Quarter to quarter, for each State, transportation costs for shipping wheat via the PNW route decreased 4 percent and, via the Gulf route, declined 5 percent. Year to year, transportation costs for shipping via PNW were up 3 percent from Kansas and up 1 percent from North Dakota. For the same period, transportation costs for shipping via the Gulf increased 6 percent from Kansas but decreased 5 percent from North Dakota (tables 1 and 2).

Table 1: Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through the PNW

	Kansas					North Dakota				
Mode	2019 1st qtr	2019 4th qtr	2020 1st qtr	Year-to-year change	Quarterly change	2019 1st qtr	2019 4th qtr	2020 1st qtr	Year-to-year change	Quarterly change
	$/metric ton			%	%	$/metric ton			%	%
Truck	8.78	11.46	10.70	21.87	-6.63	8.78	11.46	10.70	21.87	-6.63
Rail[1]	62.10	62.77	62.83	1.18	0.10	58.46	57.61	57.61	-1.45	0.00
Ocean vessel	22.98	26.28	23.10	0.52	-12.10	22.98	26.28	23.10	0.52	-12.10
Transportation costs	93.86	100.51	96.63	2.95	-3.86	90.22	95.35	91.41	1.32	-4.13
Farm value[2]	181.39	142.57	160.81	-11.35	12.79	187.39	152.00	173.19	-7.58	13.94
Total landed cost	275.25	243.08	257.44	-6.47	5.91	277.61	247.35	264.60	-4.69	6.97
Transport % of landed cost	34.10	41.35	37.53			32.50	38.55	34.55		

Table 2: Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through the U.S. Gulf

	Kansas					North Dakota				
Mode	2019 1st qtr	2019 4th qtr	2020 1st qtr	Year-to-year change	Quarterly change	2019 1st qtr	2019 4th qtr	2020 1st qtr	Year-to-year change	Quarterly change
	$/metric ton			%	%	$/metric ton			%	%
Truck	8.78	11.46	10.70	21.87	-6.63	8.78	11.46	10.70	21.87	-6.63
Rail[1]	42.66	43.31	43.31	1.52	0.00	60.14	60.57	60.78	1.06	0.35
Ocean vessel	40.86	48.25	43.38	6.17	-10.09	40.86	48.25	43.38	6.17	-10.09
Transportation costs	92.30	103.02	97.39	5.51	-5.46	109.78	120.28	114.86	4.63	-4.51
Farm value[2]	181.39	142.57	160.81	-11.35	12.79	187.39	152.00	173.19	-7.58	13.94
Total landed cost	273.69	245.59	258.20	-5.66	5.13	297.17	272.28	288.05	-3.07	5.79
Transport % of landed cost	33.72	41.95	37.72			36.94	44.18	39.88		

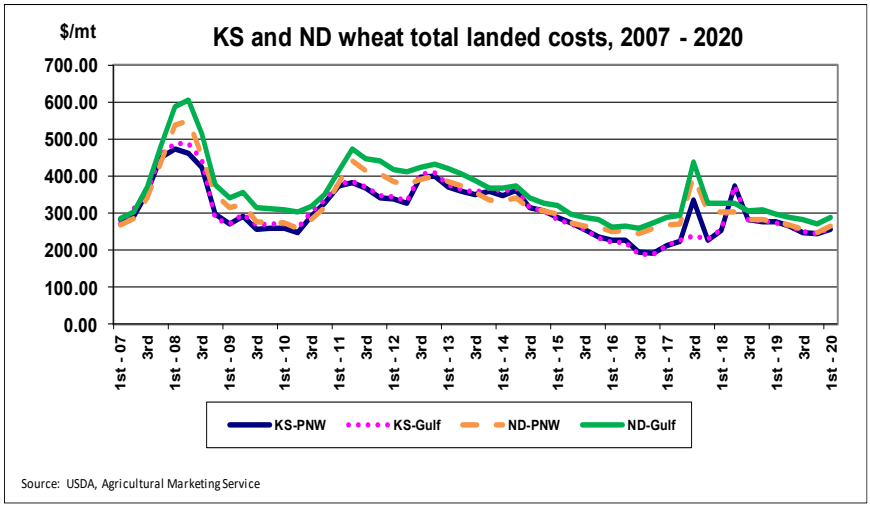
[1] Rail tariff rates include fuel surcharges and revisions for heavy-axle railcars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car.

[2] USDA, National Agricultural Statistics Service is the source for wheat prices for North Dakota (mainly hard red spring) and Kansas (mainly hard red winter).
Note: PNW = Pacific Northwest; qtr = quarter
Source: USDA, Agricultural Marketing Service.

Ocean freight rates. Quarter to quarter, ocean freight rates for shipping via the PNW route decreased 12 percent and, via the Gulf route, decreased 10 percent (tables 1 and 2). This decline stemmed from a drop in global dry bulk trade (see April 16, 2020 *Grain Transportation Report (GTR)*). Compared to last year, ocean freight rates for shipping wheat via the PNW route increased 1 percent and, via the Gulf, increased 6 percent. Quarter to quarter, trucking rates for transporting grain from each State to a local elevator decreased 7 percent. However, year to year, trucking rates increased 22 percent, partly in response to higher demand for wheat and higher trucking activity.

Rail tariff rates. Quarter to quarter, rail tariff rates for shipping wheat to PNW and to the Gulf (for both Kansas and Nebraska origins) were unchanged (tables 1 and 2). Year to year, rail rates to PNW increased 1 percent for Kansas, but decreased 2 percent for North Dakota. Year to year, rail rates to the Gulf, increased 2 percent for Kansas and 1 percent for North Dakota.

Total landed costs. Quarter to quarter, total landed costs for shipping wheat from Kansas to Japan increased 6 percent via the PNW route and 5 percent via the Gulf route as Kansas farm values rose over the same period (tables 1 and 2). However, year to year, Kansas-to-Japan landed costs decreased 6 percent for each route, reflecting lower year-to-year Kansas farm values. Quarter to quarter, total landed costs for shipping wheat from North Dakota to Japan were up 7 percent via the PNW route and up 6 percent via the Gulf route, reflecting higher quarter-to-quarter North Dakota farm values. Year to year, North Dakota-to-Japan landed costs were down 5 percent via the PNW route and down 3 percent via the Gulf route, responding to lower year-to-year North Dakota farm values.



First-quarter 2020 total landed costs for shipping wheat for the PNW and Gulf routes (including Kansas and North Dakota origins) ranged from $257 per mt to $288 per mt. First-quarter Kansas transportation costs represented 38 percent of total landed costs (for each route—PNW and Gulf)—a lower share than the previous quarter but higher than last year. First-quarter North Dakota wheat transportation costs represented 35 percent of total landed costs for the PNW route and 40 percent for the Gulf route. Like the Kansas shares, the North Dakota shares were lower than the previous quarter but higher than last year.

Export Outlook. According to USDA's Federal Grain Inspection Service, first-quarter 2020 inspections of wheat for export to Japan totaled .630 million metric tons (mmt). Year to year, this is a 3-percent decrease, and quarter to quarter, a 14-percent decrease. First-quarter 2020 wheat exports to Japan represented 11 percent of total U.S. wheat exports. Total U.S. first-quarter wheat exports were 5.6 mmt, down 6 percent year to year (April 9, 2020 *GTR*). Currently, year-to-date outstanding (unshipped) export balances of wheat are down 19 percent from the same period in 2019, and cumulative exports are down 11 percent year to year (*GTR* table 12). According to USDA's April *World Agricultural Supply and Demand Estimates (WASDE)*, U.S. wheat exports for marketing year 2019/20 are projected to reach 26.8 mmt, up 5 percent from last year but down 1 percent from *WASDE*'s March forecast.
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Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit train	Shuttle		Gulf	Pacific
05/06/20	161	n/a	217	143	161	133
04/29/20	164	n/a	219	151	167	137

[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	5/1/2020	4/24/2020
Corn	IL–Gulf	-0.63	-0.63
Corn	NE–Gulf	-0.86	-0.86
Soybean	IA–Gulf	-0.96	-0.92
HRW	KS–Gulf	-2.04	-2.03
HRS	ND–Portland	-2.11	-2.15

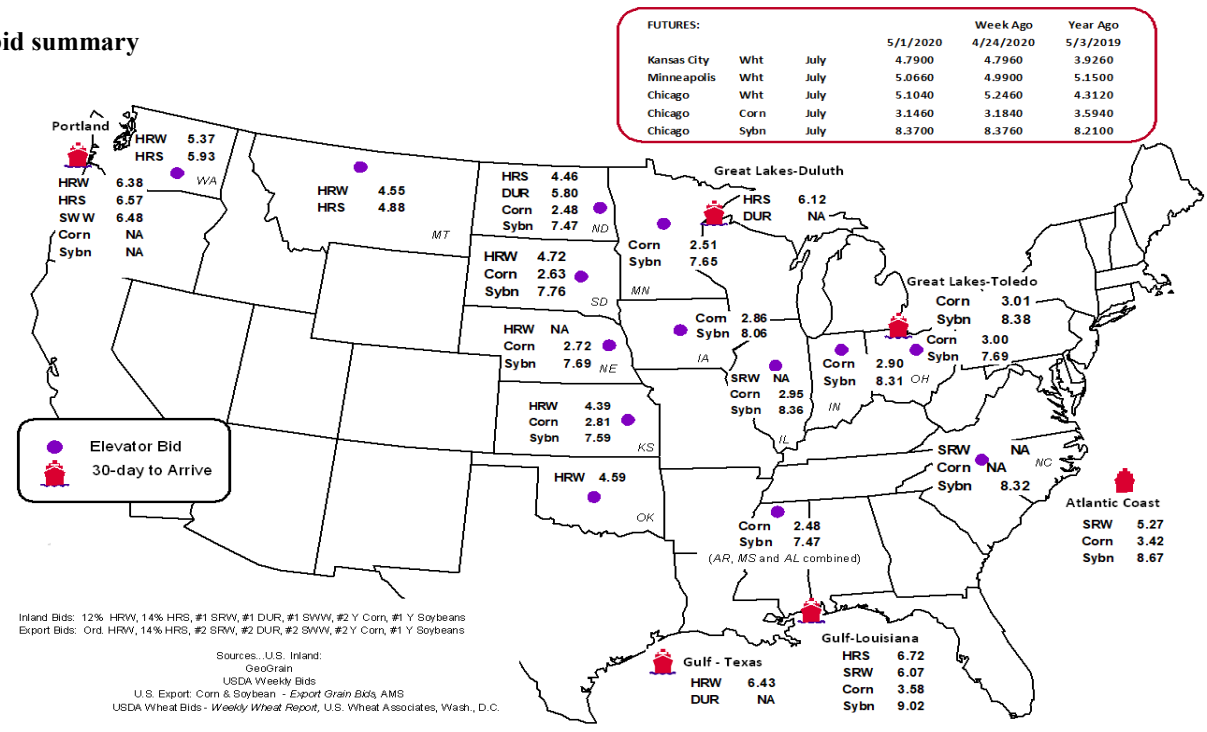
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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]
4/29/2020[p]	662	1,782	6,480	321	9,245	4/25/2020	2,083
4/22/2020[r]	624	767	6,126	207	7,724	4/18/2020	1,798
2020 YTD[r]	7,438	13,157	81,939	3,790	106,324	2020 YTD	39,987
2019 YTD[r]	14,639	20,629	100,944	6,610	142,822	2019 YTD	38,791
2020 YTD as % of 2019 YTD	51	64	81	57	74	% change YTD	103
Last 4 weeks as % of 2019[2]	78	76	95	62	89	Last 4wks. % 2019	104
Last 4 weeks as % of 4-year avg.[2]	204	70	102	53	98	Last 4wks. % 4 yr.	103
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.

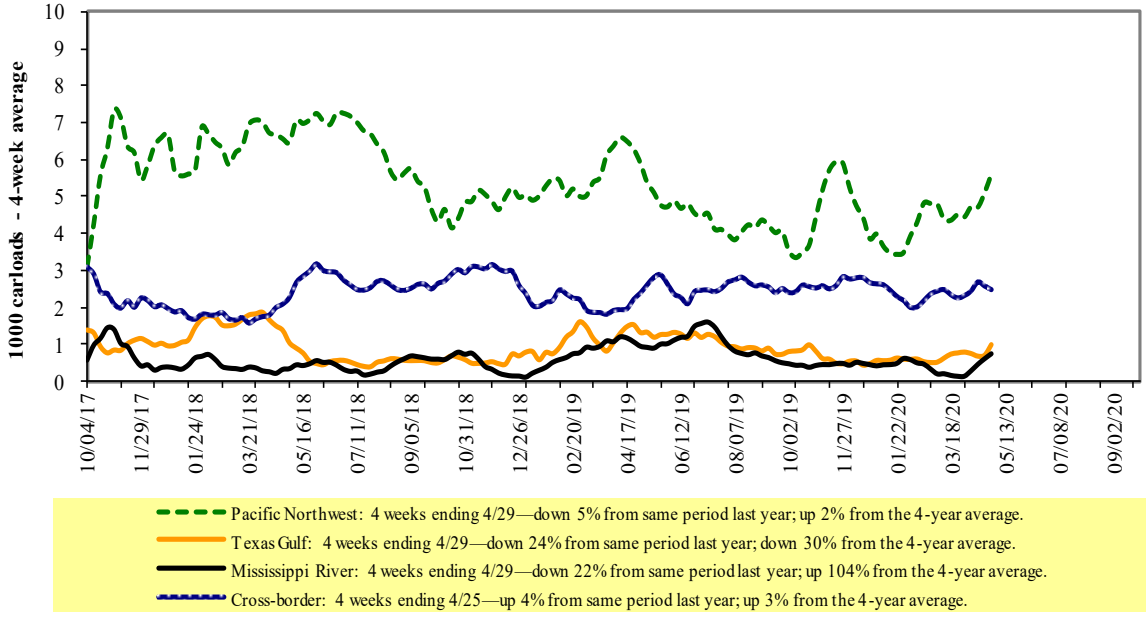
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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	
4/25/2020	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,590	2,496	10,728	892	5,985	21,691	4,220	5,783
This week last year	1,967	3,151	12,978	1,095	5,947	25,138	5,248	5,917
2020 YTD	29,150	39,238	180,119	17,988	79,964	346,459	63,653	69,961
2019 YTD	33,577	46,452	183,935	19,254	87,543	370,761	74,250	73,346
2020 YTD as % of 2019 YTD	87	84	98	93	91	93	86	95
Last 4 weeks as % of 2019*	88	83	94	85	94	92	86	99
Last 4 weeks as % of 3-yr. avg.**	87	86	91	95	92	91	101	108
Total 2019	91,611	137,170	568,369	58,527	260,269	1,115,946	212,533	235,892

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

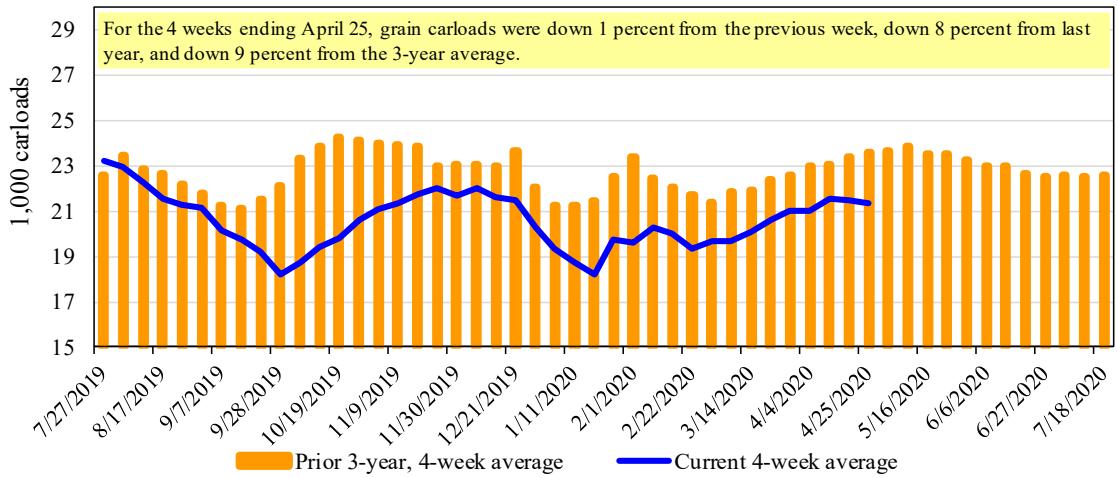
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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							
4/30/2020		May-20	May-19	Jun-20	Jun-19	Jul-20	Jul-19	Aug-20	Aug-19
BNSF[3]	COT grain units	no bids	no offer	no bids	1	no bids	0	no bids	0
	COT grain single-car	0	no offer	0	280	0	254	0	201
UP[4]	GCAS/Region 1	no offer	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.

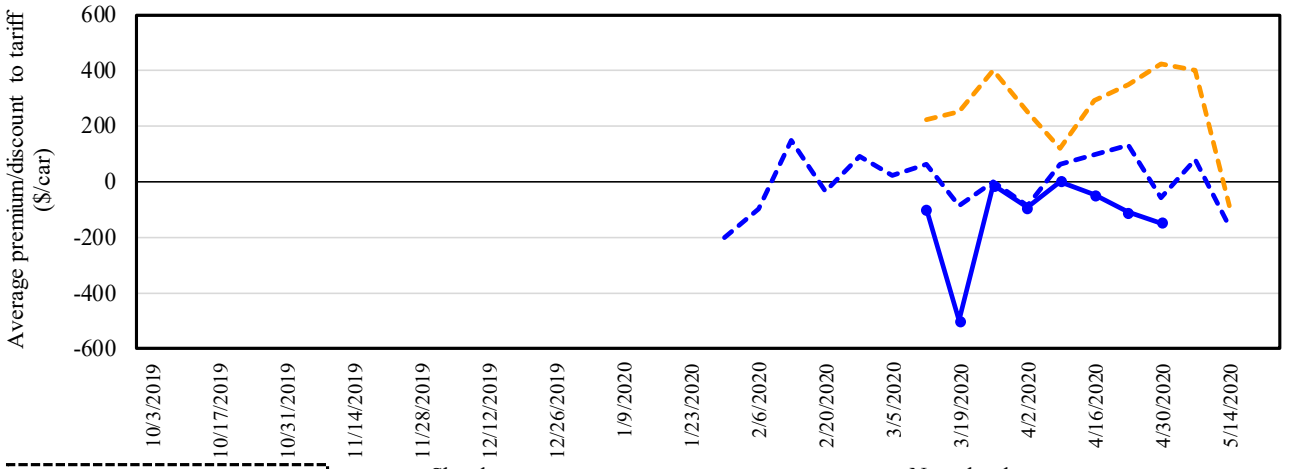
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

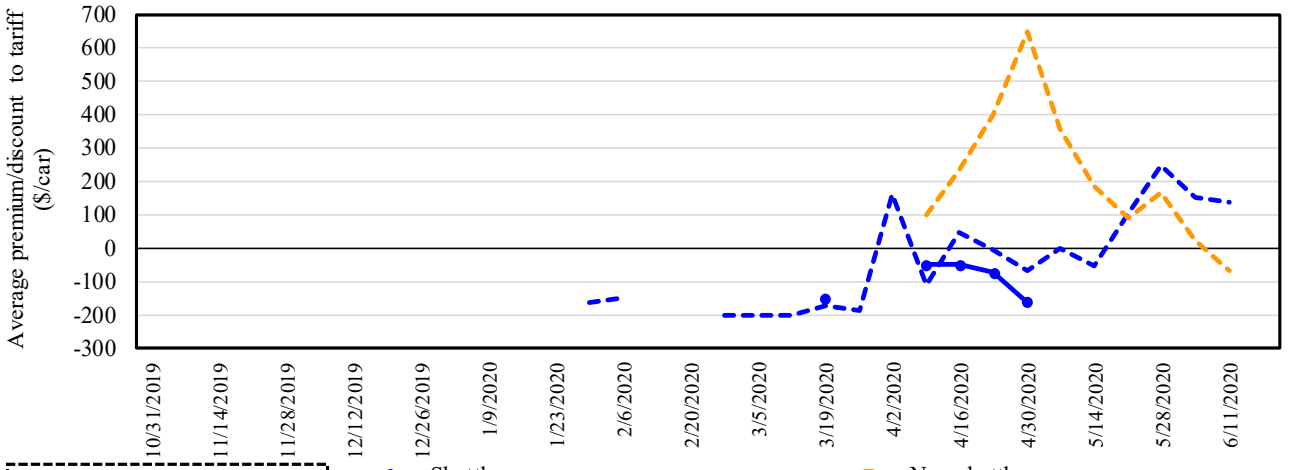


4/30/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$160	-$138

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $39 this week and are $149 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



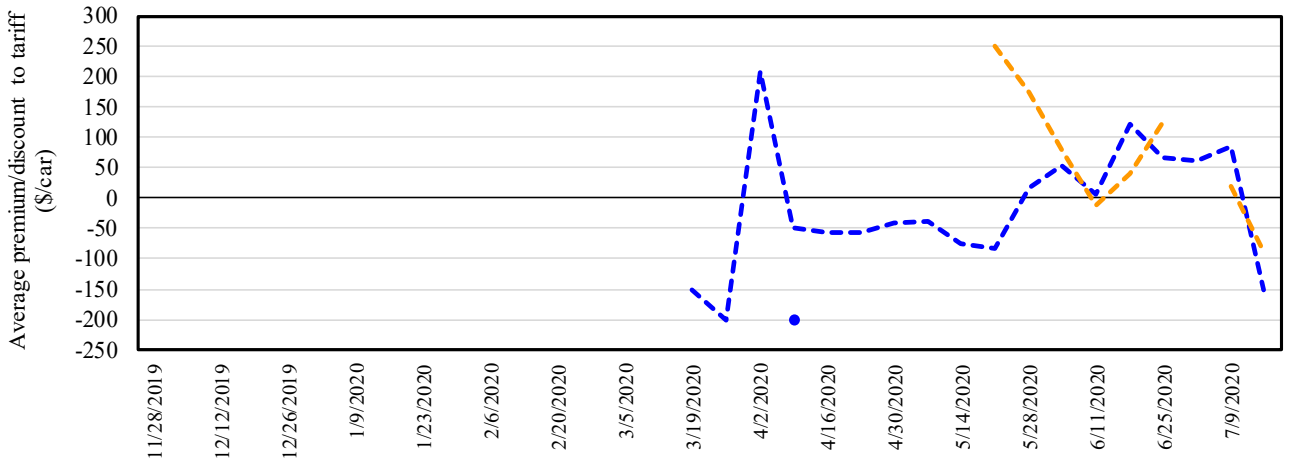
4/30/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	n/a	-$163

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $88 this week and are $113 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



4/30/2020	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: 4/30/2020		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**	**(160)**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(102)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2019	(98)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**(138)**	**(163)**	**n/a**	**n/a**	**n/a**	**(100)**
	Change from last week	25	(88)	n/a	n/a	n/a	n/a
	Change from same week 2019	(21)	(63)	n/a	n/a	n/a	(250)

[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]

May 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	$66	$40.21	$1.09	-1
	Grand Forks, ND	Duluth-Superior, MN	$4,333	$0	$43.03	$1.17	2
	Wichita, KS	Los Angeles, CA	$7,240	$0	$71.90	$1.96	1
	Wichita, KS	New Orleans, LA	$4,525	$116	$46.08	$1.25	-2
	Sioux Falls, SD	Galveston-Houston, TX	$6,976	$0	$69.28	$1.89	1
	Colby, KS	Galveston-Houston, TX	$4,801	$127	$48.93	$1.33	-2
	Amarillo, TX	Los Angeles, CA	$5,121	$176	$52.61	$1.43	-2
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,900	$131	$40.03	$1.02	-4
	Toledo, OH	Raleigh, NC	$6,816	$0	$67.69	$1.72	4
	Des Moines, IA	Davenport, IA	$2,415	$28	$24.26	$0.62	6
	Indianapolis, IN	Atlanta, GA	$5,818	$0	$57.78	$1.47	3
	Indianapolis, IN	Knoxville, TN	$4,874	$0	$48.40	$1.23	4
	Des Moines, IA	Little Rock, AR	$3,800	$81	$38.54	$0.98	-3
	Des Moines, IA	Los Angeles, CA	$5,680	$237	$58.76	$1.49	-3
Soybeans	Minneapolis, MN	New Orleans, LA	$3,631	$112	$37.17	$1.01	-2
	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	$131	$47.43	$1.29	-3
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	$4,143	$0	$41.14	$1.12	2
	Wichita, KS	Galveston-Houston, TX	$4,361	$0	$43.31	$1.18	2
	Chicago, IL	Albany, NY	$7,074	$0	$70.25	$1.91	20
	Grand Forks, ND	Portland, OR	$5,801	$0	$57.61	$1.57	1
	Grand Forks, ND	Galveston-Houston, TX	$6,121	$0	$60.78	$1.65	1
	Colby, KS	Portland, OR	$6,012	$208	$61.77	$1.68	0
Corn	Minneapolis, MN	Portland, OR	$5,180	$0	$51.44	$1.31	0
	Sioux Falls, SD	Tacoma, WA	$5,140	$0	$51.04	$1.30	0
	Champaign-Urbana, IL	New Orleans, LA	$3,820	$131	$39.23	$1.00	-1
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	0
	Des Moines, IA	Amarillo, TX	$4,220	$102	$42.92	$1.09	2
	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	$151	$49.91	$1.36	0
	Toledo, OH	Huntsville, AL	$4,805	$0	$47.72	$1.30	4
	Grand Island, NE	Portland, OR	$5,260	$213	$54.35	$1.48	-9

[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: May 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	$91	$70.15	$1.91	0
	KS	Guadalajara, JA	$7,534	$380	$80.86	$2.20	2
	TX	Salinas Victoria, NL	$4,329	$55	$44.79	$1.22	-1
Corn	IA	Guadalajara, JA	$8,902	$329	$94.32	$2.39	4
	SD	Celaya, GJ	$8,140	$0	$83.17	$2.11	3
	NE	Queretaro, QA	$8,278	$185	$86.47	$2.19	0
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,643	$180	$79.93	$2.03	0
	SD	Torreon, CU	$7,690	$0	$78.57	$1.99	3
Soybeans	MO	Bojay (Tula), HG	$8,547	$307	$90.46	$2.46	3
	NE	Guadalajara, JA	$9,172	$322	$97.00	$2.64	3
	IA	El Castillo, JA	$9,490	$0	$96.97	$2.64	4
	KS	Torreon, CU	$7,964	$224	$83.66	$2.27	3
Sorghum	NE	Celaya, GJ	$7,772	$292	$82.40	$2.09	3
	KS	Queretaro, QA	$8,108	$113	$84.00	$2.13	1
	NE	Salinas Victoria, NL	$6,713	$91	$69.51	$1.76	0
	NE	Torreon, CU	$7,092	$206	$74.57	$1.89	1

[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.

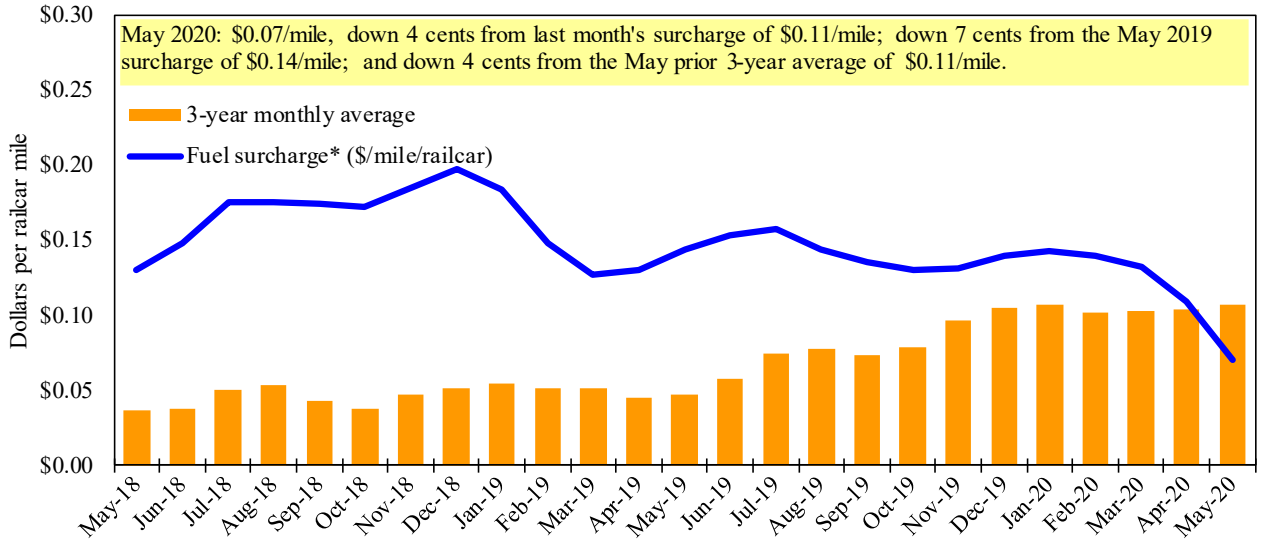
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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.

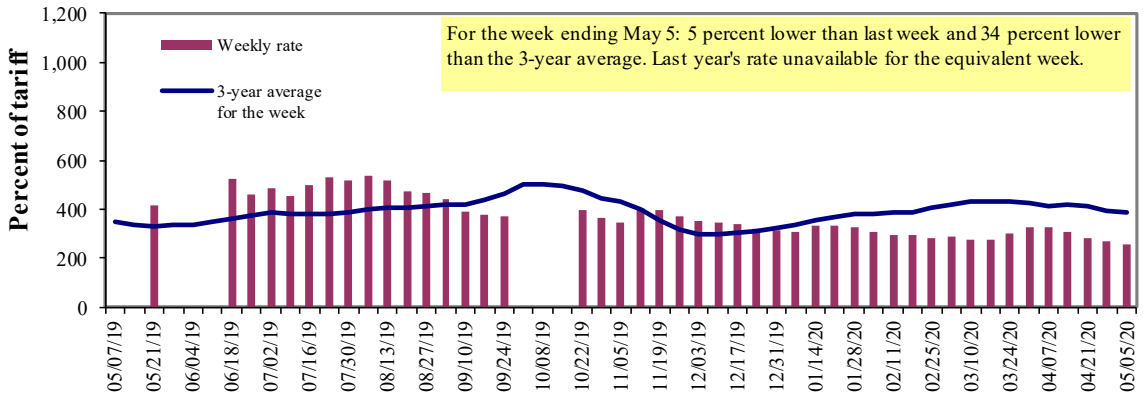
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.

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]	5/5/2020	321	266	257	176	183	183	167
	4/28/2020	335	278	271	175	188	188	173
$/ton	5/5/2020	19.87	14.15	11.92	7.02	8.58	7.39	5.24
	4/28/2020	20.74	14.79	12.57	6.98	8.82	7.60	5.43
Current week % change from the same week:								
	Last year	-	-	-	-	-51	-51	-39
	3-year avg. [2]	-32	-34	-34	-40	-42	-42	-38
Rate[1]	May	324	269	265	181	186	186	171
	July	341	275	-	208	204	204	214

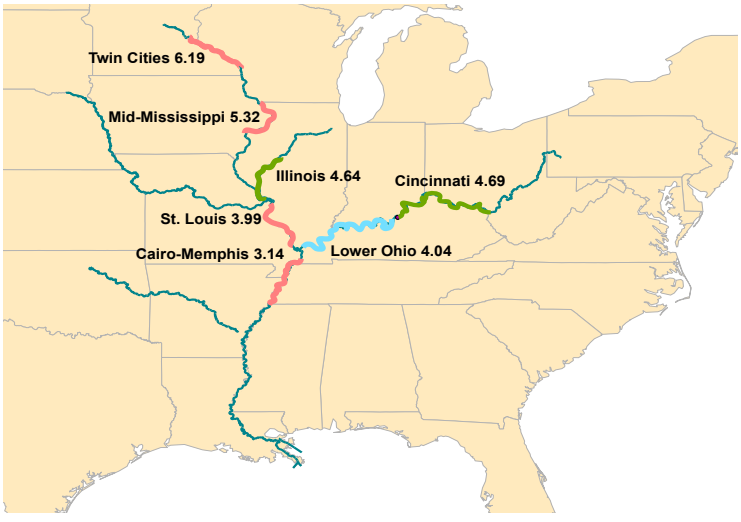
[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds; "-" not available due to closure.

Source: USDA, Agricultural Marketing Service.

Figure 9
Benchmark tariff rates

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

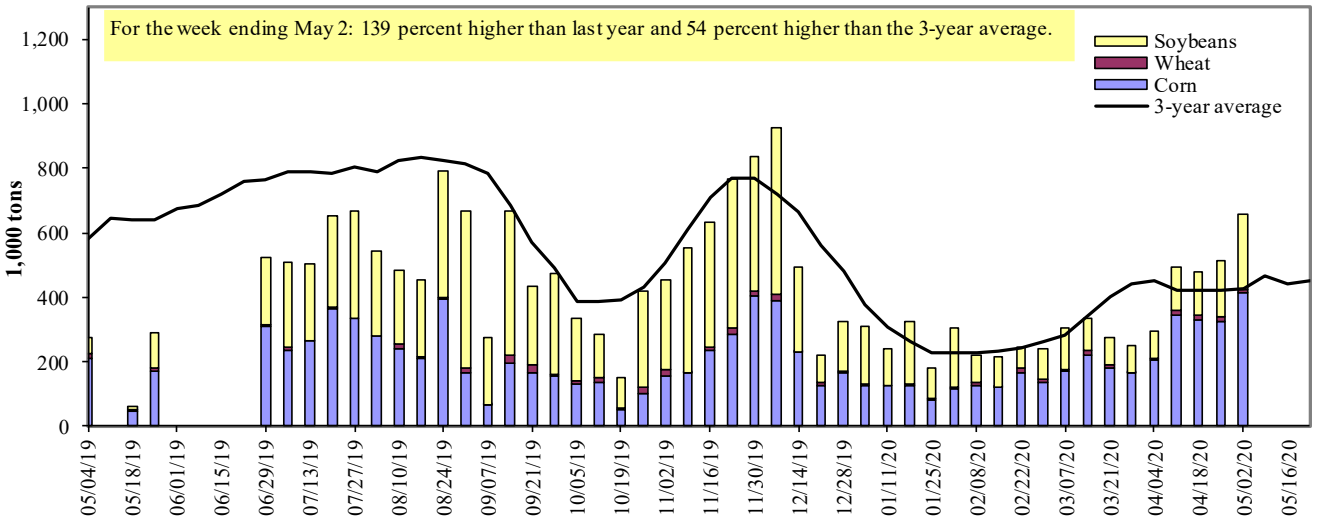
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 05/02/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	124	0	73	0	197
Winfield, MO (L25)	275	0	147	0	422
Alton, IL (L26)	422	6	224	0	653
Granite City, IL (L27)	415	8	233	0	656
Illinois River (La Grange)	145	6	46	0	197
Ohio River (Olmsted)	66	0	68	11	146
Arkansas River (L1)	0	27	21	0	48
Weekly total - 2020	482	35	322	11	850
Weekly total - 2019	334	39	121	5	499
2020 YTD[1]	5,268	558	3,899	30	9,755
2019 YTD[1]	4,321	802	3,286	51	8,460
2020 as % of 2019 YTD	122	70	119	58	115
Last 4 weeks as % of 2019[2]	152	83	186	144	156
Total 2019	12,780	1,631	14,683	154	29,247

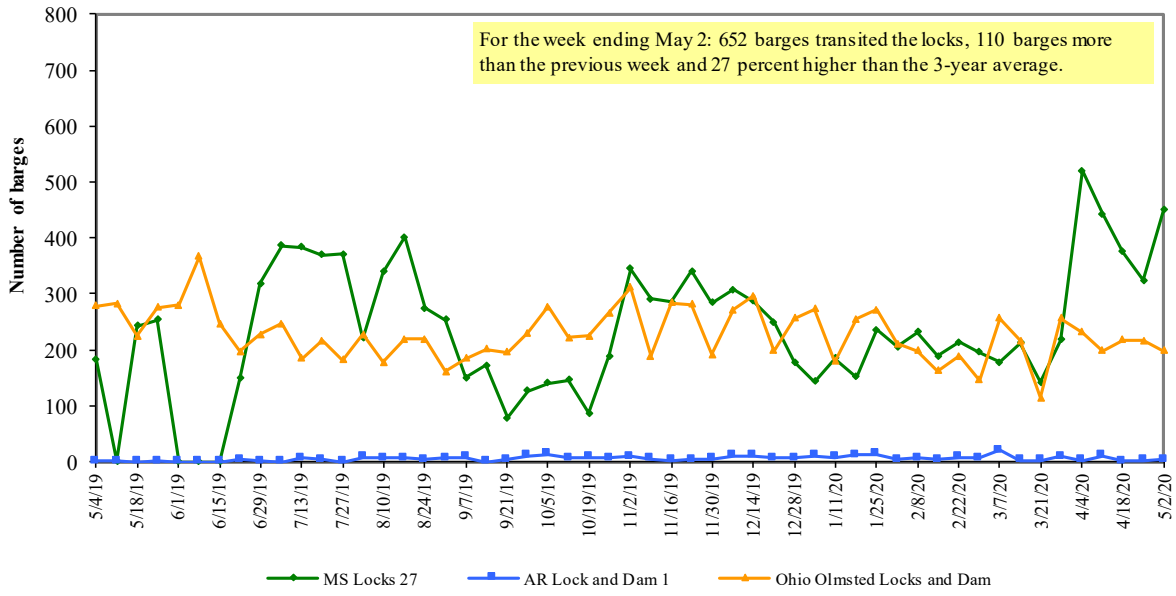
[1] Weekly total, YTD (year-to-date), and calendar year total include MS/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. L (as in "L15") refers to a lock or lock and dam facility. Olmsted = Olmsted Locks and Dam. La Grange = La Grange Lock and Dam.

[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

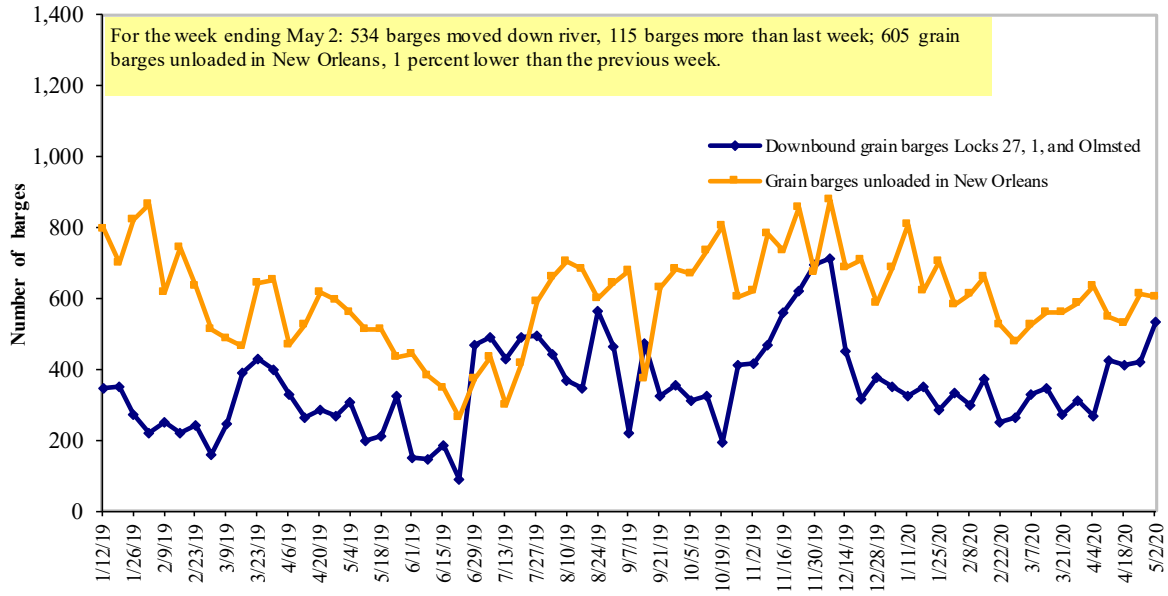
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 5/4/2020 (U.S. $/gallon)

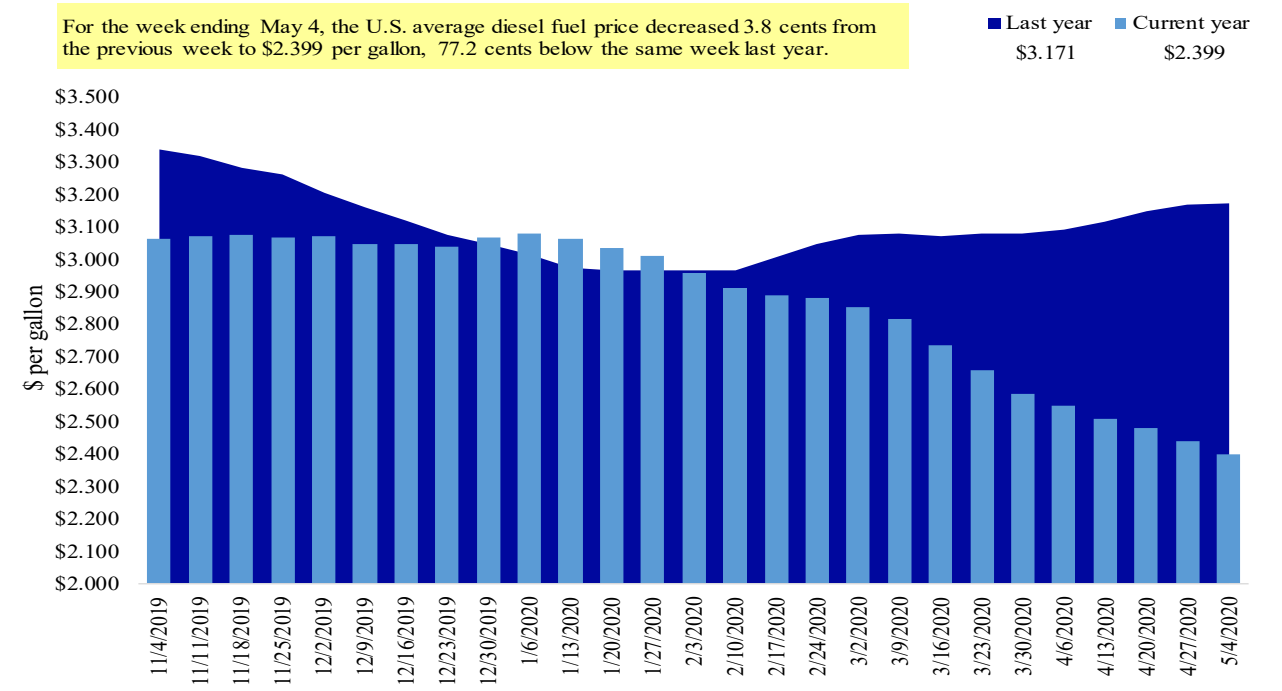
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.510	-0.035	-0.680
	New England	2.652	-0.025	-0.593
	Central Atlantic	2.688	-0.023	-0.691
	Lower Atlantic	2.360	-0.046	-0.691
II	Midwest	2.248	-0.039	-0.816
III	Gulf Coast	2.169	-0.039	-0.758
IV	Rocky Mountain	2.370	-0.064	-0.816
V	West Coast	2.899	-0.035	-0.866
	West Coast less California	2.545	-0.048	-0.800
	California	3.191	-0.023	-0.906
Total	United States	2.399	-0.038	-0.772

[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]									
4/23/2020	1,560	200	1,306	875	133	4,075	14,045	5,308	23,428
This week year ago	2,184	710	1,004	847	67	4,812	11,194	12,874	28,881
Cumulative exports-marketing year[2]									
2019/20 YTD	8,265	2,209	6,281	4,301	802	21,857	22,701	33,745	78,303
2018/19 YTD	7,071	2,673	5,947	4,543	416	20,650	34,863	32,199	87,712
YTD 2019/20 as % of 2018/19	117	83	106	95	193	106	65	105	89
Last 4 wks. as % of same period 2018/19*	74	35	137	109	282	90	125	40	81
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 4/23/2020	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 -			
Mexico	12,802	14,702	(13)	14,659
Japan	8,060	10,371	(22)	11,955
Korea	1,967	3,685	(47)	4,977
Colombia	3,497	3,938	(11)	4,692
Peru	86	1,992	(96)	2,808
Top 5 importers	**26,411**	**34,687**	**(24)**	**39,091**
Total U.S. corn export sales	**36,746**	**46,057**	**(20)**	**54,024**
% of projected exports	84%	88%		
Change from prior week[2]	**1,357**	**587**		
Top 5 importers' share of U.S. corn export sales	72%	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 4/23/2020	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	13,252	13,270	(0)	25,733
Mexico	4,146	4,668	(11)	4,271
Indonesia	1,681	1,858	(10)	2,386
Japan	2,133	2,173	(2)	2,243
Egypt	2,699	2,357	15	1,983
Top 5 importers	**23,911**	**24,326**	**(2)**	**36,616**
Total U.S. soybean export sales	**39,053**	**45,073**	**(13)**	**53,746**
% of projected exports	81%	95%		
change from prior week[2]	**1,078**	**10,250**		
Top 5 importers' share of U.S. soybean export sales	61%	54%		**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 4/23/2020	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	3,386	3,128	8	3,047
Mexico	3,785	3,273	16	3,034
Japan	2,742	2,741	0	2,695
Nigeria	1,568	1,584	(1)	1,564
Indonesia	1,011	1,328	(24)	1,381
Korea	1,565	1,578	(1)	1,355
Taiwan	1,442	1,107	30	1,164
Egypt	101	815	(88)	821
Thailand	878	746	18	747
Iraq	262	616	(57)	574
Top 10 importers	**16,741**	**16,914**	(1)	**16,382**
Total U.S. wheat export sales	**25,932**	**25,462**	**2**	**24,388**
% of projected exports	97%	100%		
change from prior week[2]	**467**	**122**		
Top 10 importers' share of U.S. wheat export sales	65%	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 04/30/20	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	363	267	136	5,406	4,750	114	107	112	13,961
Corn	311	419	74	2,614	4,603	57	63	56	7,047
Soybeans	144	76	189	2,567	4,018	64	312	117	11,969
Total	**818**	**762**	**107**	**10,587**	**13,371**	**79**	**94**	**84**	**32,977**
Mississippi Gulf									
Wheat	85	115	74	1,336	1,821	73	80	89	4,448
Corn	661	514	129	9,724	9,652	101	99	85	20,763
Soybeans	97	408	24	8,404	8,906	94	91	90	31,398
Total	**842**	**1,037**	**81**	**19,464**	**20,380**	**96**	**95**	**87**	**56,609**
Texas Gulf									
Wheat	60	38	157	1,213	2,181	56	35	39	6,009
Corn	65	31	209	278	272	102	87	145	640
Soybeans	0	0	n/a	7	0	n/a	n/a	n/a	2
Total	**125**	**69**	**180**	**1,498**	**2,453**	**61**	**45**	**53**	**6,650**
Interior									
Wheat	37	49	75	828	575	144	110	127	1,987
Corn	151	96	158	2,599	2,457	106	91	81	7,857
Soybeans	80	83	97	2,337	2,285	102	66	74	7,043
Total	**268**	**227**	**118**	**5,764**	**5,317**	**108**	**83**	**83**	**16,887**
Great Lakes									
Wheat	20	64	31	130	156	83	102	121	1,339
Corn	0	0	n/a	0	0	n/a	n/a	0	11
Soybeans	0	8	0	8	43	20	32	32	493
Total	**20**	**73**	**27**	**138**	**199**	**69**	**90**	**88**	**1,844**
Atlantic									
Wheat	0	0	n/a	1	32	2	0	0	37
Corn	8	0	n/a	8	49	16	113	54	99
Soybeans	13	15	90	345	502	69	59	36	1,353
Total	**21**	**15**	**146**	**353**	**583**	**61**	**47**	**35**	**1,489**
U.S. total from ports*									
Wheat	564	533	106	8,914	9,516	94	87	95	27,781
Corn	1,196	1,060	113	15,222	17,034	89	86	75	36,417
Soybeans	334	590	57	13,668	15,753	87	97	87	52,258
Total	**2,094**	**2,183**	**96**	**37,804**	**42,303**	**89**	**89**	**83**	**116,457**

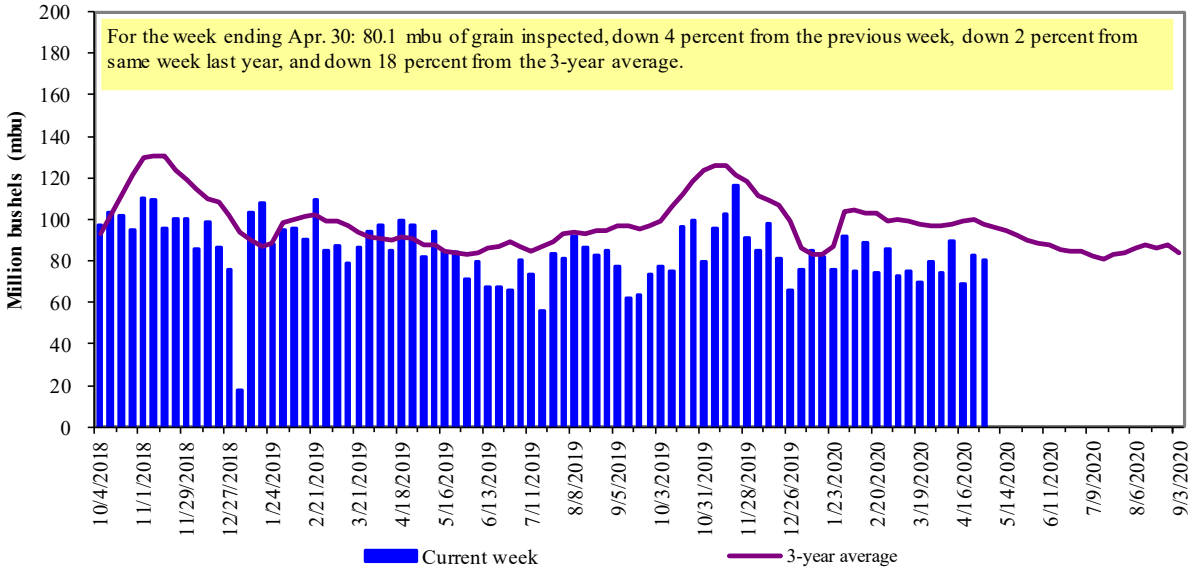
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

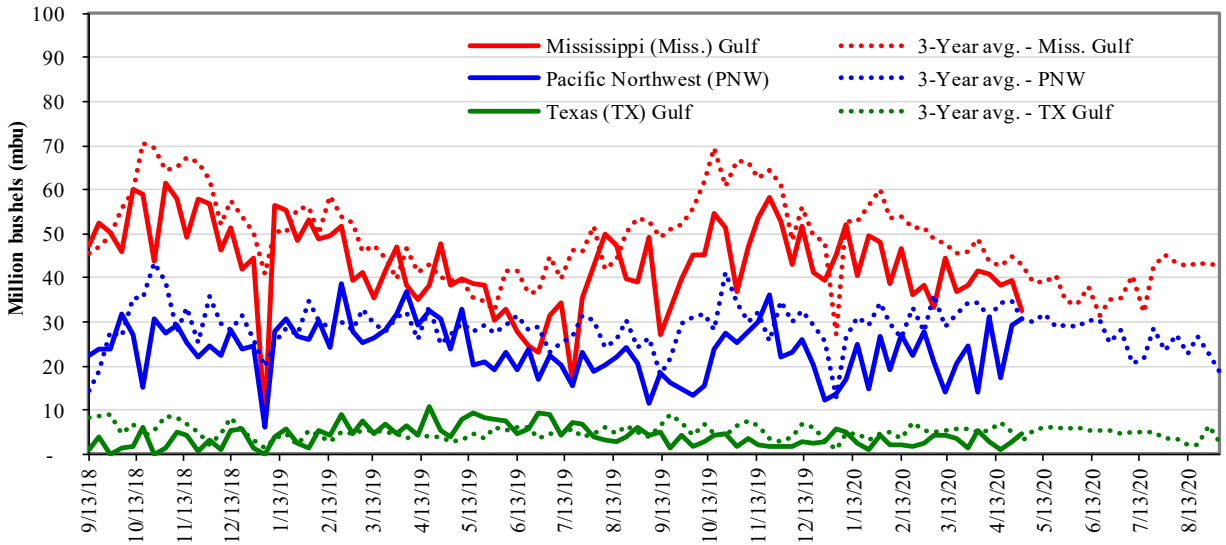


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 04/30/20 inspections (mbu):	
MS Gulf:	32.7
PNW:	30.9
TX Gulf:	4.7

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	down 17	up 81	down 11	up 6
Last Year (same wk):	down 15	up 22	down 11	up 29
3-yr avg. (4-wk. mov. Avg):	down 25	down 6	down 23	down 5

Source: USDA, Federal Grain Inspection Service.

Table 17

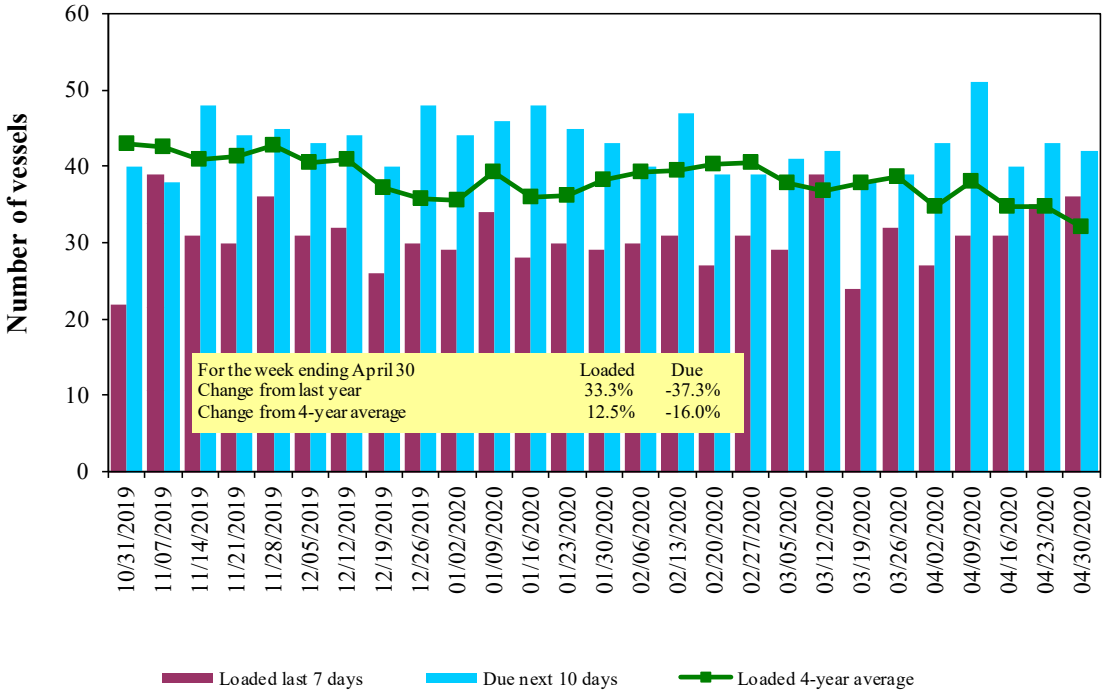
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
4/30/2020	25	36	42	16
4/23/2020	31	35	43	18
2019 range	(26…61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service.

Figure 16

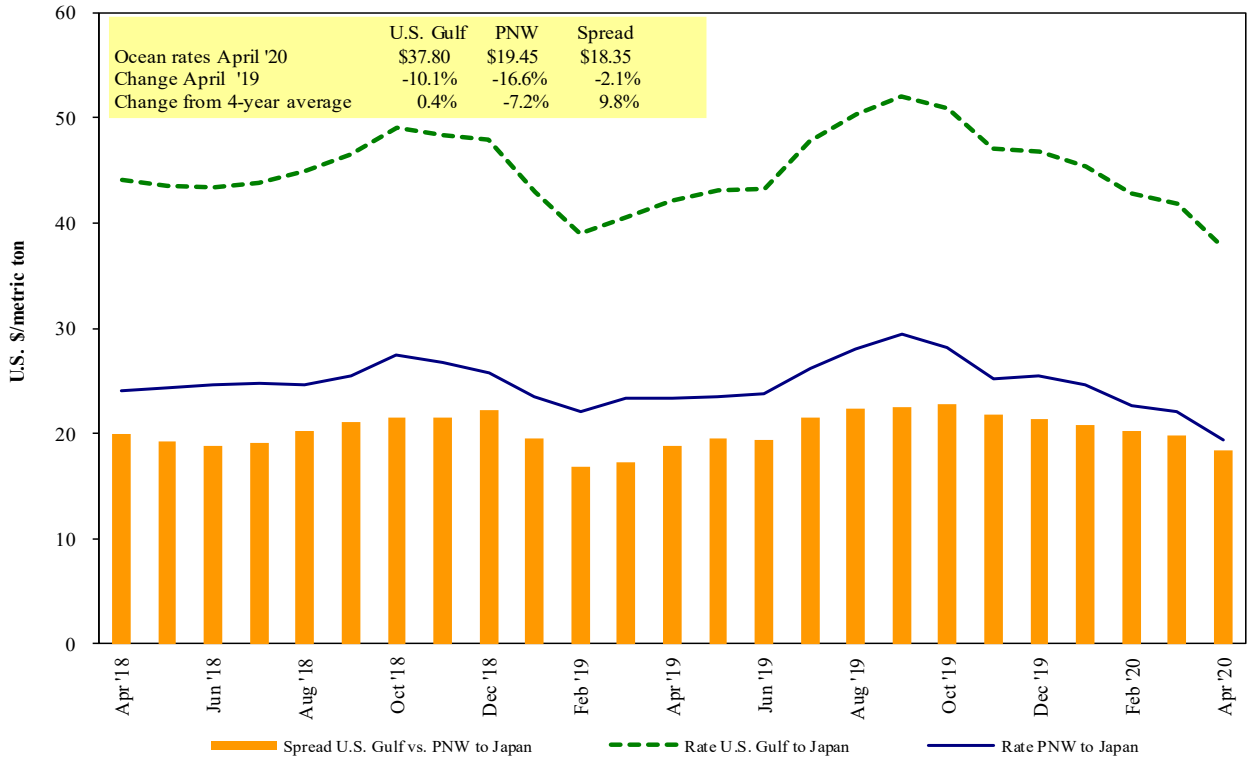
U.S. Gulf[1] vessel loading activity



[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 05/02/2020

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 18/26	20,000	55.75*
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

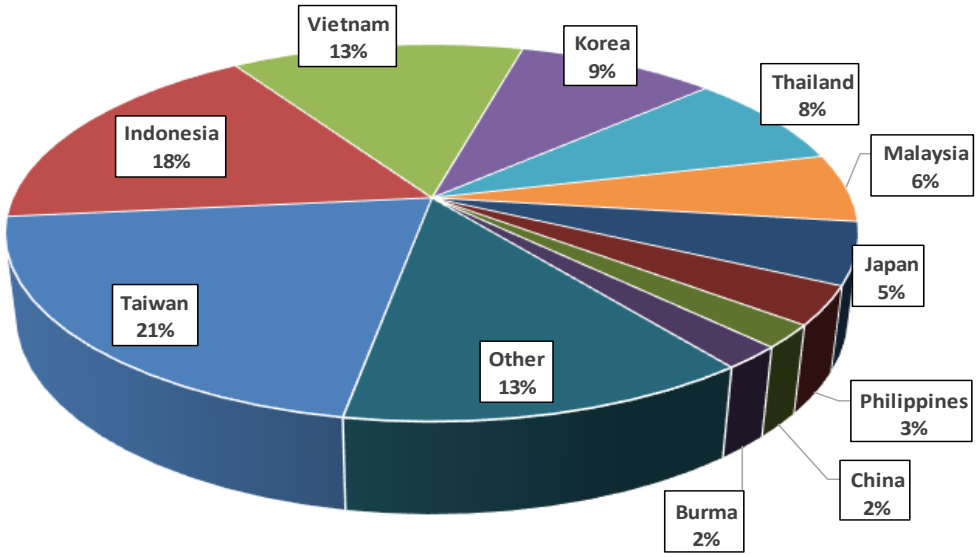
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

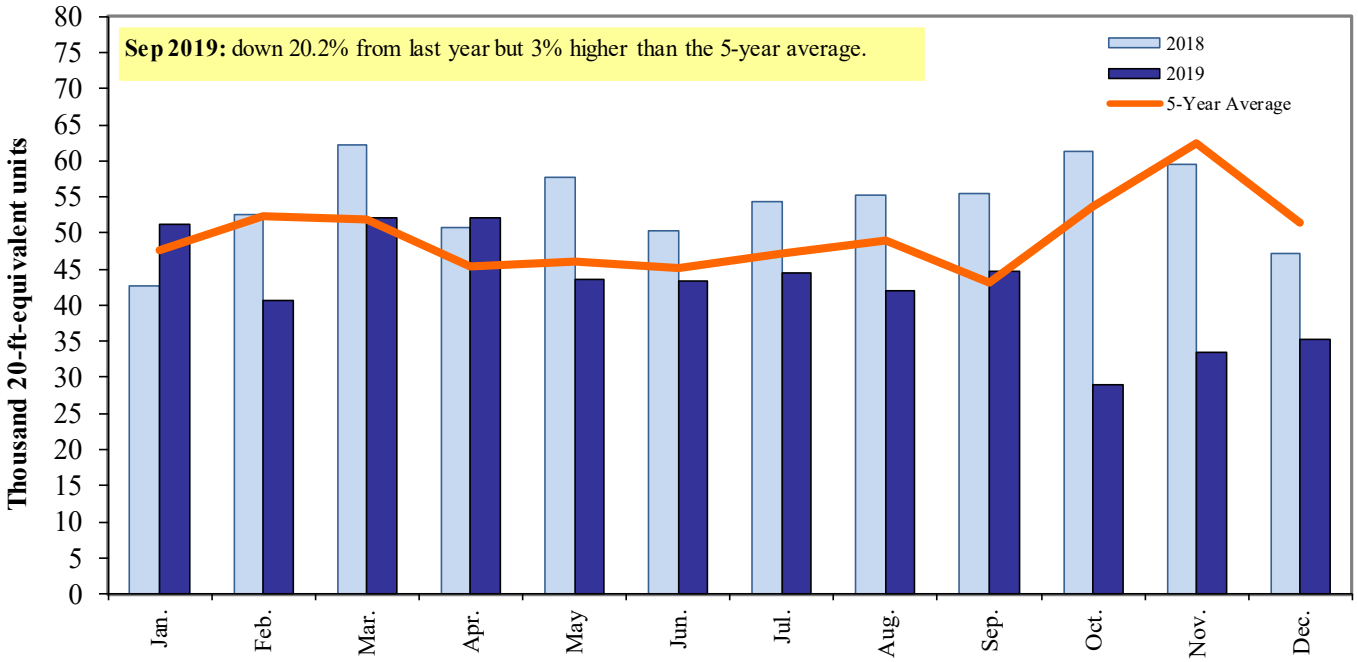
Figure 18
Top 10 destination markets for U.S. containerized grain exports, 2019



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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