USDA United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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May 21, 2020

Contents

The next release is May 28, 2020

WEEKLY HIGHLIGHTS

Illinois River Closures Scheduled This Summer

U.S. Army Corps of Engineers has announced that shutdowns on the Illinois River system will take place from July through October to allow rehabilitation on five locks. The locks provide a navigable link between Lake Michigan and the Mississippi River north of St. Louis. To lessen the impact on commercial navigation, closures will be done concurrently. Affected locks and dams and their closure dates are as follows: La Grange Lock and Dam, July 1-September 30; Peoria Lock and Dam, July 6-September 30; Starved Rock Lock and Dam, July 1-October 29; Marseilles Lock and Dam, July 6-October 29; and Dresden Island Lock and Dam, partial closure for July 6-October 3 and October 25-28 and full closure for October 4-24.

FMCSA Issues Final Rule on Changes to HOS Regulations

The Federal Motor Carrier Safety Administration (FMCSA) issued its final rule on changes to driver hours-of-service (HOS) regulations, effective 120 days after publication in the Federal Register. The main revisions include the following: First, the rule gives more flexibility to the 30-minute break rule by requiring a break after 8 hours of consecutive driving. Also, "on-duty, not driving" status, rather than "off-duty" status may be used for breaks. Second, the rule modifies the sleeper-berth rule by allowing drivers to split their required 10 hours off duty (per 24 hours) into two periods. The split could be either 8/2 or 7/3, with neither period counting against the driver's 14-hour driving window. The maximum adverse driving conditions window is extended by 2 hours. Third, the rule increases short-haul drivers' maximum on-duty period from 12 hours to 14 hours. Further, the rule extends the distance limit the short-haul driver may operate from 100 air miles (115.08 miles) to 150 air miles (172.6 miles). FMCSA expects the rule to produce $274 million in annualized cost savings for the U.S. economy.

Total Grain Inspections Down but Wheat Rebounds

For the week ending May 14, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions were 2 million metric tons (mmt). Total grain inspections were down 15 percent from the previous week, down 11 percent from last year, and down 13 percent from the 3-year average. Wheat inspections rose 28 percent despite the drop in total grain inspections. Shipments of wheat increased, primarily to Asia. From the previous week, corn inspections decreased 18 percent and soybean inspections decreased 34 percent. From the previous week, total grain inspections decreased 8 percent in the Pacific Northwest (PNW) and decreased 23 percent in the Mississippi Gulf. In the last 4 weeks, inspections of grain were 7 percent below last year and 11 percent below the 3-year average.

Snapshots by Sector

Export Sales

For the week ending May 7, **unshipped balances** of wheat, corn, and soybeans totaled 22.5 million metric tons (mmt). This represented an 11-percent decrease in outstanding sales from the same time last year. Net **corn export sales** were 1.073 mmt, down 39 percent from the past week. Net **soybean export sales** were 0.656 mmt, unchanged from the previous week. Net weekly **wheat export sales** were 0.204 mmt, down 17 percent from the previous week.

Rail

U.S. Class I railroads originated 21,626 **grain carloads** during the week ending May 9. This was a 5-percent decrease from the previous week, 11 percent less than last year, and 8 percent lower than the 3-year average.

Average May shuttle **secondary railcar** bids/offers (per car) were $144 below tariff for the week ending May 14. This was $69 more than last week. There were no shuttle bids/offers this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending May 16, **barge grain movements** totaled 633,750 tons. This was 20 percent less than the previous week and 72 percent more than the same period last year.

For the week ending May 16, 413 grain barges **moved down river**—93 fewer barges than the previous week. There were 515 grain barges **unloaded in New Orleans**, 20 percent less than the previous week.

Ocean

For the week ending May 14, 29 **oceangoing grain vessels** were loaded in the Gulf—unchanged from the same period last year. Within the next 10 days (starting May 15), 48 vessels were expected to be loaded—9 percent fewer than the same period last year.

As of May 14, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $34.00. This was 3 percent less than the previous week. The rate from PNW to Japan was $17.75 per mt, 3 percent less than the previous week.

Fuel

For the week ending May 18, the U.S. average **diesel fuel price** decreased 0.8 cents from the previous week to $2.386 per gallon, 77.7 cents below the same week last year.

Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* May 21, 2020.
Web: **http://dx.doi.org/10.9752/TS056.05-21-2020**

Corn and Soybean Transportation Costs in First Quarter 2020

From first quarter 2019 to first quarter 2020 (year to year), transportation costs varied by route and did not exhibit consistent trends across all reference routes. For example, shipping either corn or soybeans from Minneapolis, MN, to the U.S. Gulf to Japan (the Gulf route), transportation costs fell substantially, but they increased slightly from Minneapolis to the Pacific Northwest to Japan (the PNW route) (see tables 1 and 2). Transportation costs for the PNW route received a boost from higher trucking rates. In contrast, lower barge and ocean freight rates could explain the year-to-year drop in Gulf-route transportation costs. The year-to-year decline in ocean rates resulted from typical seasonal factors and a global slowdown in dry bulk shipping (April 16, 2020 *Grain Transportation Report (GTR)*). Overall, landed costs were mostly down year to year, but landed costs for shipping corn through the PNW route increased.

Table 1: Cost of shipping corn and soybeans from Minneapolis to Japan through the U.S. Gulf

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent Change	
	1st qtr. '19	4th qtr. '19	1st qtr. '20	Yr. to Yr.	Qtr to Qtr	1st qtr. '19	4th qtr. '19	1st qtr. '20	Yr. to Yr.	Qtr to Qtr
Truck	8.78	11.46	10.70	21.87	-6.63	8.78	11.46	10.70	21.87	-6.63
Barge[1]	16.98	26.54	9.02	-46.88	n/a	16.98	26.54	9.02	-46.88	n/a
Rail[2]	50.81	n/a	39.06	-23.13	n/a	47.98	n/a	36.73	-23.45	n/a
Ocean	40.86	48.25	43.38	6.17	-10.09	40.86	48.25	43.38	6.17	-10.09
Total transportation cost	117.43	86.25	102.16	-13.00	18.45	114.60	86.25	99.83	-12.89	15.74
Farm value[3]	134.43	129.65	139.89	4.06	7.90	310.24	320.28	289.79	-6.59	-9.52
Total landed cost	251.86	215.90	242.05	-3.90	12.11	424.84	406.53	389.62	-8.29	-4.16
Transportation % landed cost	46.63	39.95	42.21			26.97	21.22	25.62		

Table 2: Cost of shipping corn and soybeans from Minneapolis to Japan through the Pacific Northwest

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent Change	
	1st qtr. '19	4th qtr. '19	1st qtr. '20	Yr. to Yr.	Qtr to Qtr	1st qtr. '19	4th qtr. '19	1st qtr. '20	Yr. to Yr.	Qtr to Qtr
Truck	8.78	12.10	10.70	21.87	-11.57	8.78	11.46	10.70	21.87	-6.63
Rail[2]	51.44	51.44	51.44	0.00	0.00	57.60	58.59	58.59	1.72	0.00
Ocean	22.98	26.28	23.10	0.52	-12.10	22.98	26.28	23.10	0.52	-12.10
Total Transportation Cost	83.20	89.82	85.24	2.45	-5.10	89.36	96.33	92.39	3.39	-4.09
Farm Value[3]	134.43	129.65	139.89	4.06	7.90	310.24	320.28	289.79	-6.59	-9.52
Total Landed Cost	217.63	219.47	225.13	3.45	2.58	399.60	416.61	382.18	-4.36	-8.26
Transportation % Landed Cost	38.23	40.93	37.86			22.36	23.12	24.17		

[1] Barge rates are from St. Louis to the Gulf; 4th quarter MN rail rates to St. Louis are not used due to the river being opened.

[2] Rail rate quotes are from MN to St. Louis in the Gulf. All rail tariffs include fuel surcharges and revisions for heavy axle rail cars 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.

[3] USDA, National Agricultural Statistics Service is the source for corn and soybean prices.

Note: qtr. = quarter; yr. = year.

Source: USDA, Agricultural Marketing Service.

U.S. Gulf Costs

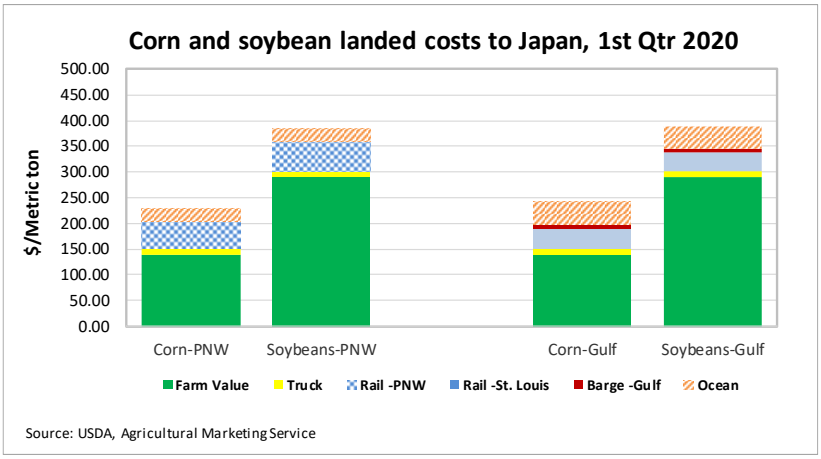
Transportation costs. Year to year, transportation costs for shipping grain via the Gulf route decreased 13 percent for corn and for soybeans (see table 1), mainly as a result of lower barge and rail rates. Year to year, trucking rates for moving grain to local grain elevators in Minnesota jumped 22 percent, partly responding to rising trucking activity during first quarter 2020. First-quarter transportation costs for shipping corn via the Gulf route accounted for 42 percent of Gulf-route landed costs for corn, and first-quarter transportation costs for shipping soybeans accounted for 26 percent Gulf-route landed costs for soybeans. This reflects a decrease for corn and for soybeans, compared to last year (see table 1).

Landed costs. Via the Gulf route, first-quarter 2020 total landed costs were roughly $242 per metric ton (mt) for shipping corn and $390 per mt for soybeans (see figure). Year to year, landed costs increased 4 percent for corn and decreased 8 percent for soybeans. Lower barge and rail rates drove the drop in landed costs (see table 1). Although barge's and rail's share of total Gulf-route landed costs for corn and soybeans decreased year to year, ocean's share of landed costs increased slightly.

Gulf inspections. Year to year, U.S. Gulf inspections of corn for export decreased 9 percent and were 17 percent below the 5-year average. First-quarter 2020 corn exports represented 66 percent of total corn exports. Year to year, U.S. Gulf inspections of soybeans for export decreased 11 percent, and were 21 percent below the 5-year average. U.S. Gulf soybean exports represented 63 percent of total soybean exports in first quarter 2020 (***April 9, 2020,*** *GTR*).

Pacific Northwest Costs

Transportation costs. Quarter to quarter, transportation costs for shipping corn decreased 5 percent and soybeans fell 4 percent via the PNW route (see table 2). Quarter to quarter, PNW-route shipping rates were down notably for trucking and ocean, but rail rates remained unchanged. Year to year, significantly higher trucking rates drove transportation costs up 3 percent for shipping corn and up 3 percent for soybeans. First-quarter 2020 transportation costs for shipping corn via the PNW route accounted for 38 percent of the total landed costs for corn, a slight quarter-to-quarter decrease. First-quarter 2020 transportation costs for shipping soybeans via the PNW route accounted for 24 percent of the total landed costs for soybeans, a slight quarter-to-quarter increase. Year to year, transportation costs were down for corn but up for soybeans.



Landed costs. First-quarter 2020 total landed costs for shipping grain via the PNW route were roughly $225 per mt for corn and $382 per mt for soybeans (see figure). Quarter to quarter, total landed costs were up 3 percent for corn, but down 8 percent for soybeans. Year to year, landed costs increased 4 percent for corn but dropped 4 percent for soybeans (see table 2).

Inspections. First-quarter 2020 PNW inspections of corn for export decreased 38 percent year to year and were 50 percent below the 5-year average. First-quarter 2020 corn exports via the PNW route totaled 2.8 mmt, representing 25 percent of total corn exports (April 9, 2020 *GTR)*. First-quarter 2020 PNW soybean exports decreased 45 percent from last year and were 49 percent below the 5-year average. First-quarter 2020 soybean exports via the PNW route totaled 1.8 mmt, representing 18 percent of total soybean exports. *Johnny.Hill@.usda.gov*

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit train	Shuttle		Gulf	Pacific
05/20/20	160	n/a	217	155	152	126
05/13/20	161	n/a	214	144	157	129

[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	5/15/2020	5/8/2020
Corn	IL–Gulf	-0.66	-0.65
Corn	NE–Gulf	-0.86	-0.88
Soybean	IA–Gulf	-0.94	-0.97
HRW	KS–Gulf	-1.98	-2.05
HRS	ND–Portland	-2.17	-2.06

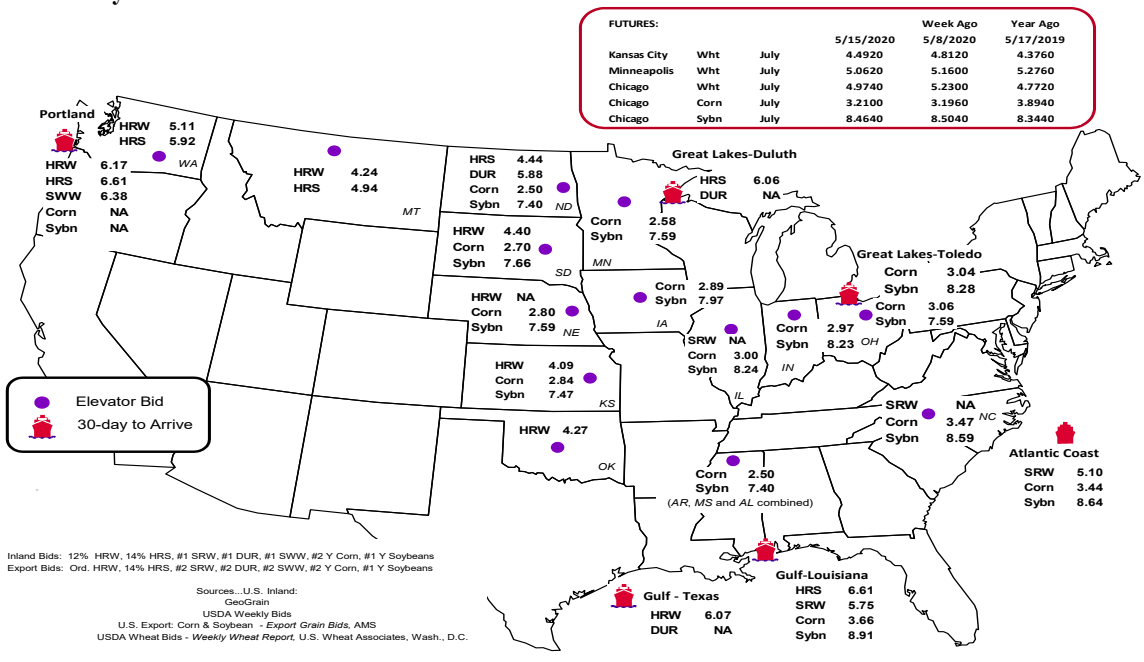
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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]
5/13/2020[p]	646	1,579	5,489	173	7,887	5/9/2020	3,160
5/06/2020[r]	628	1,025	5,563	108	7,324	5/2/2020	2,151
2020 YTD[r]	8,712	15,761	92,991	4,071	121,535	2020 YTD	45,298
2019 YTD[r]	16,532	23,209	110,543	7,322	157,606	2019 YTD	44,541
2020 YTD as % of 2019 YTD	53	68	84	56	77	% change YTD	102
Last 4 weeks as % of 2019[2]	71	108	116	58	106	Last 4wks. % 2019	81
Last 4 weeks as % of 4-year avg.[2]	157	101	113	53	110	Last 4wks. % 4 yr.	87
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.

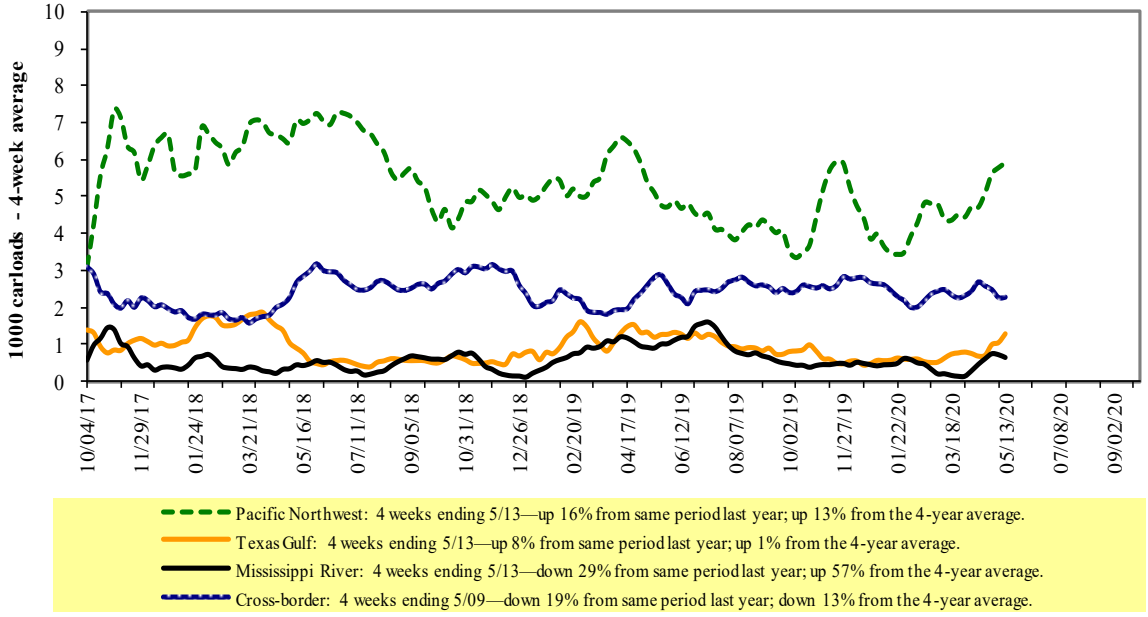
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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	
5/9/2020	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,233	2,459	10,780	1,209	5,945	21,626	4,191	5,420
This week last year	1,822	3,388	12,977	828	5,159	24,174	4,369	4,493
2020 YTD	32,448	44,266	202,361	20,073	91,590	390,738	73,066	80,479
2019 YTD	37,326	52,995	207,894	21,299	97,719	417,233	83,392	82,390
2020 YTD as % of 2019 YTD	87	84	97	94	94	94	88	98
Last 4 weeks as % of 2019*	90	76	87	97	104	90	90	109
Last 4 weeks as % of 3-yr. avg.**	90	84	88	97	101	91	103	109
Total 2019	91,611	137,179	568,369	58,527	260,269	1,115,955	212,538	235,892

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

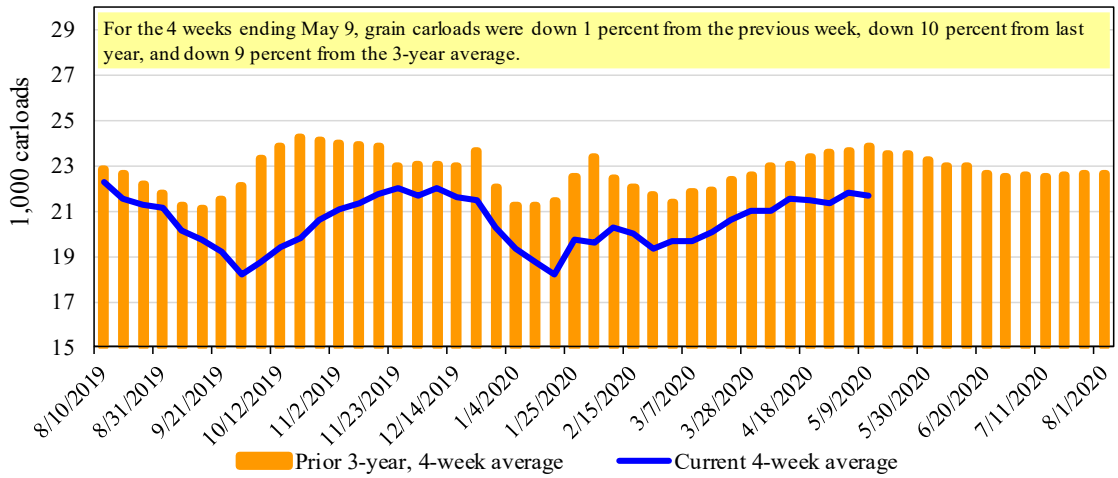
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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							
5/14/2020		May-20	May-19	Jun-20	Jun-19	Jul-20	Jul-19	Aug-20	Aug-19
BNSF[3]	COT grain units	no bids	n/a	0	0	no bids	no bids	0	0
	COT grain single-car	0	n/a	0	213	0	180	0	75
UP[4]	GCAS/Region 1	no offer	n/a	no offer	no offer	no offer	no offer	n/a	no offer
	GCAS/Region 2	no offer	n/a	no bid	no offer	no bid	no offer	n/a	no offer

[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.

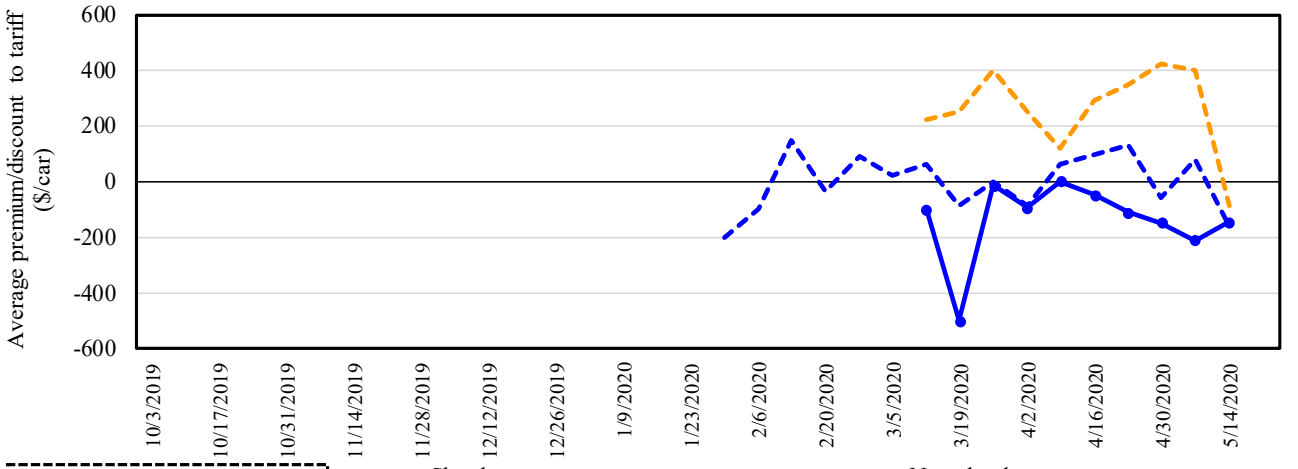
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

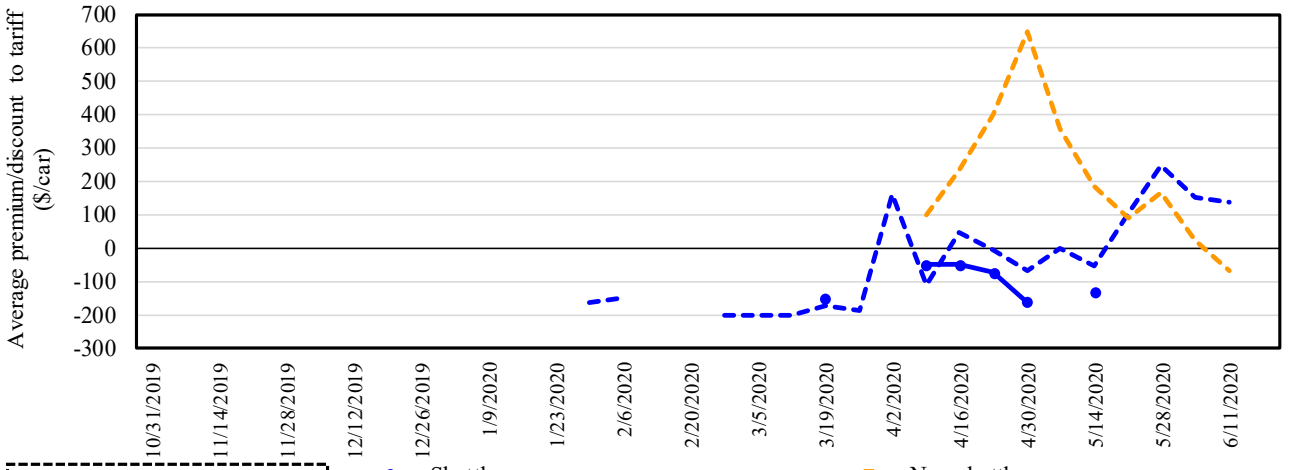


5/14/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$150	-$138

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $69 this week and are $144 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



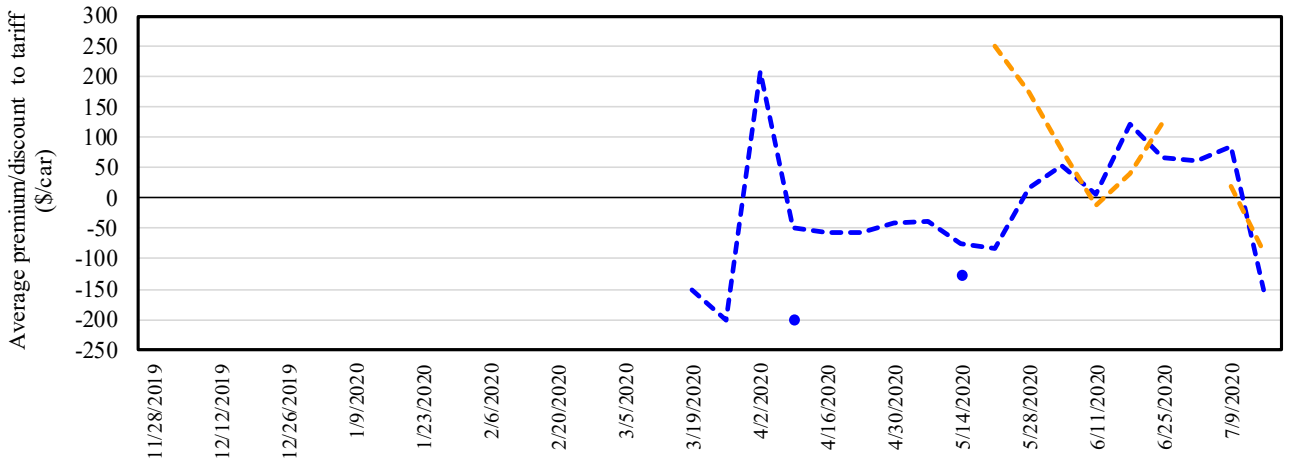
5/14/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$156	-$113

There were no non-shuttle bids/offers this week.
There were no shuttle bids/offers last week. Average non-shuttle bids/offers this week are $84 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



5/14/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	n/a	-$125

There were no non-shuttle bids/offers this week.
There were no shuttle bids/offers last week. Average non-shuttle bids/offers this week are at 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.

Table 6

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

	For the week ending: 5/14/2020	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**	**(150)**	**(156)**	**n/a**	**n/a**	**n/a**	**325**
	Change from last week	150	n/a	n/a	n/a	n/a	100
	Change from same week 2019	n/a	(23)	n/a	n/a	n/a	n/a
	UP-Pool	**(138)**	**(113)**	**(125)**	**n/a**	**n/a**	**75**
	Change from last week	(13)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2019	n/a	71	(25)	n/a	n/a	(75)

[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.

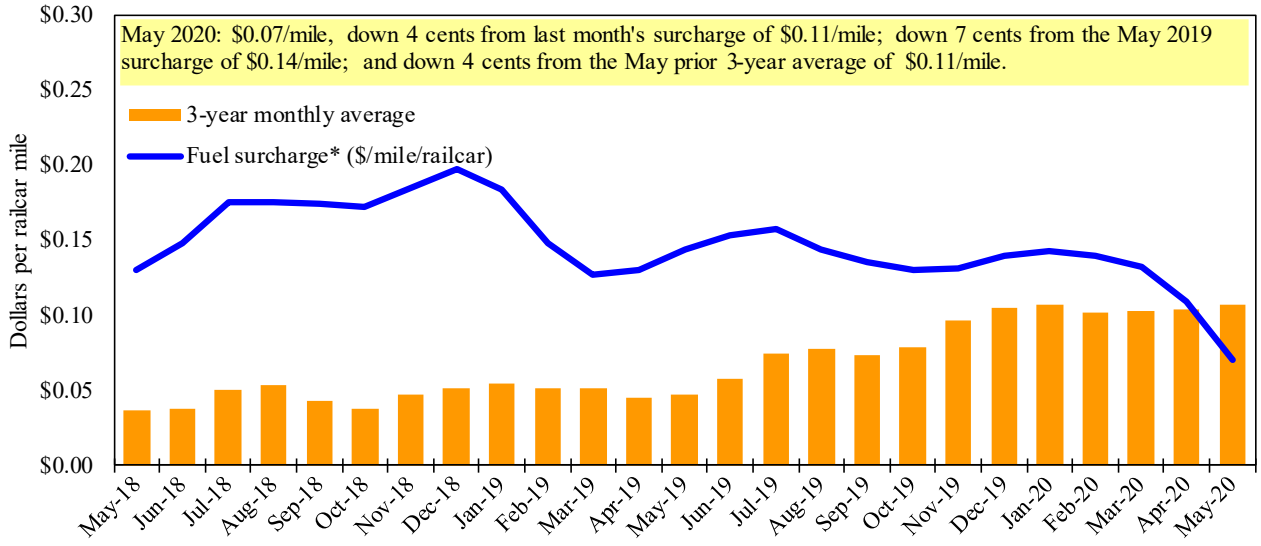
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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.

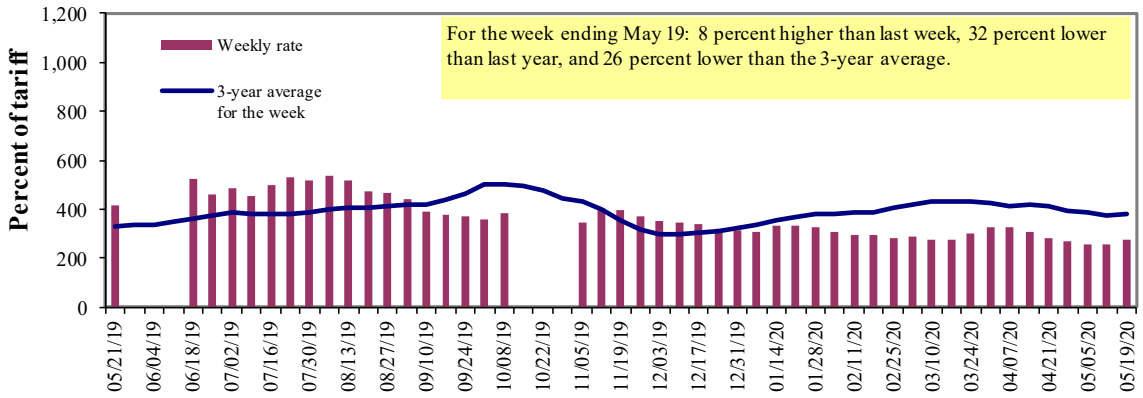
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.

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]	5/19/2020	348	286	279	199	181	181	181
	5/12/2020	318	263	259	178	176	176	166
$/ton	5/19/2020	21.54	15.22	12.95	7.94	8.49	7.31	5.68
	5/12/2020	19.68	13.99	12.02	7.10	8.25	7.11	5.21
Current week % change from the same week:								
	Last year	-	-	-32	-30	-45	-45	-37
	3-year avg. [2]	-17	-23	-26	-26	-38	-38	-28
Rate[1]	May	351	286	290	199	191	191	181
	July	360	308	-	234	251	251	228

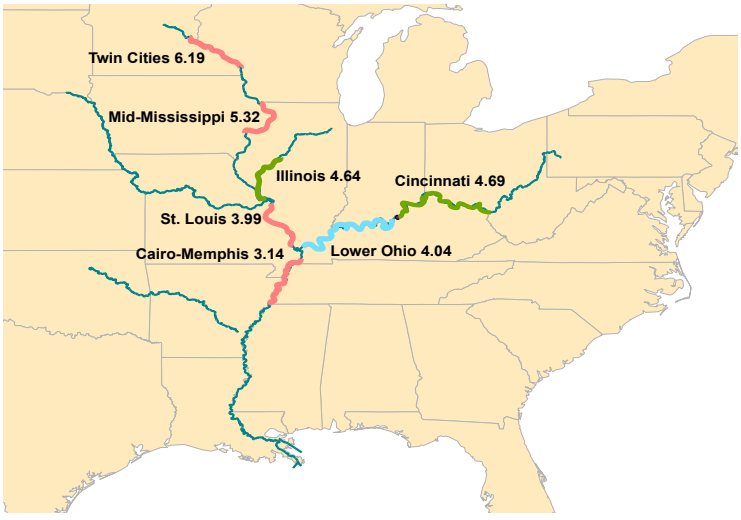
[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds; "-" not available due to closure.

Source: USDA, Agricultural Marketing Service.

Figure 9
Benchmark tariff rates

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

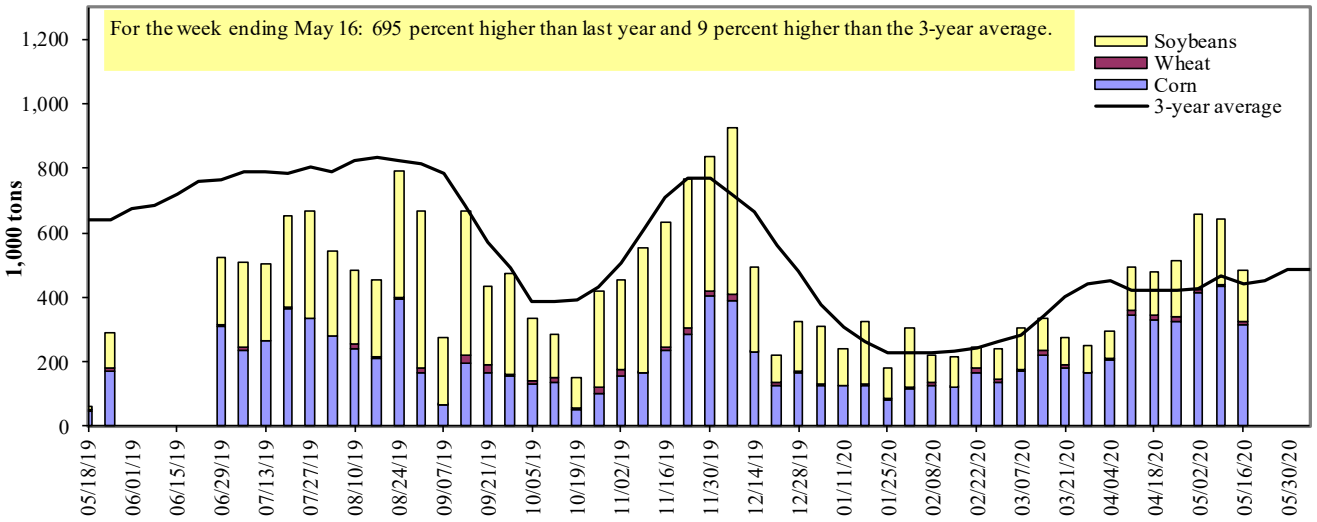
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 05/16/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	135	2	99	0	235
Winfield, MO (L25)	248	2	87	0	337
Alton, IL (L26)	321	13	169	0	502
Granite City, IL (L27)	314	13	158	0	485
Illinois River (La Grange)	105	8	61	0	174
Ohio River (Olmsted)	42	4	28	0	74
Arkansas River (L1)	0	46	29	0	76
Weekly total - 2020	356	62	216	0	634
Weekly total - 2019	229	8	127	5	369
2020 YTD[1]	6,135	653	4,353	41	11,182
2019 YTD[1]	4,773	837	3,525	66	9,199
2020 as % of 2019 YTD	129	78	124	62	122
Last 4 weeks as % of 2019[2]	168	153	201	142	177
Total 2019	12,780	1,631	14,683	154	29,247

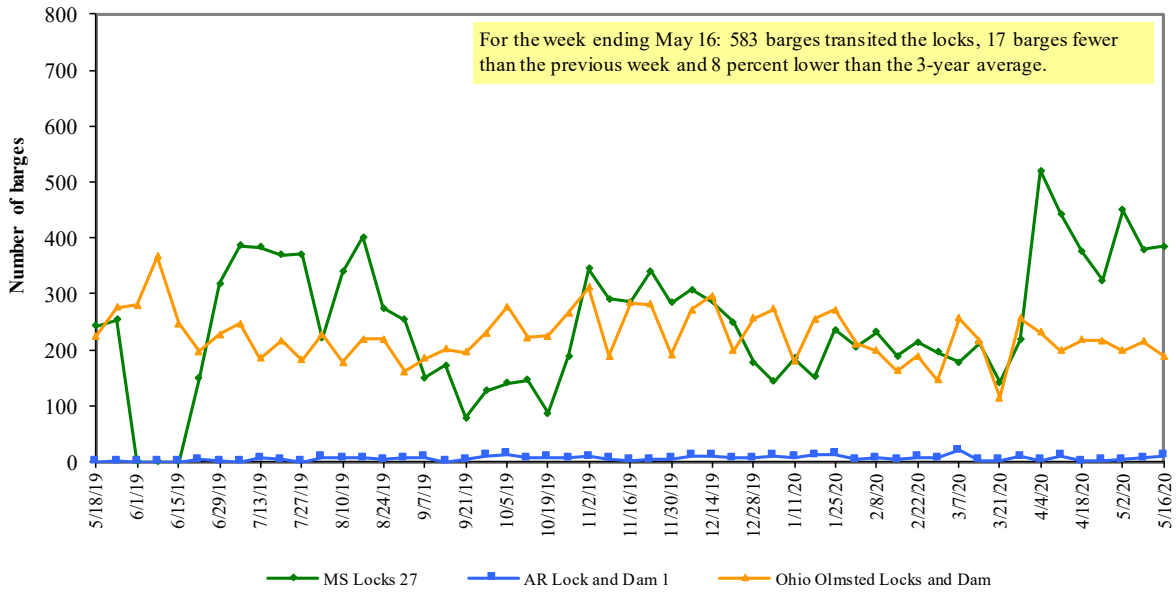
[1] Weekly total, YTD (year-to-date), and calendar year total include MS/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. L (as in "L15") refers to a lock or lock and dam facility. Olmsted = Olmsted Locks and Dam. La Grange = La Grange Lock and Dam.

[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

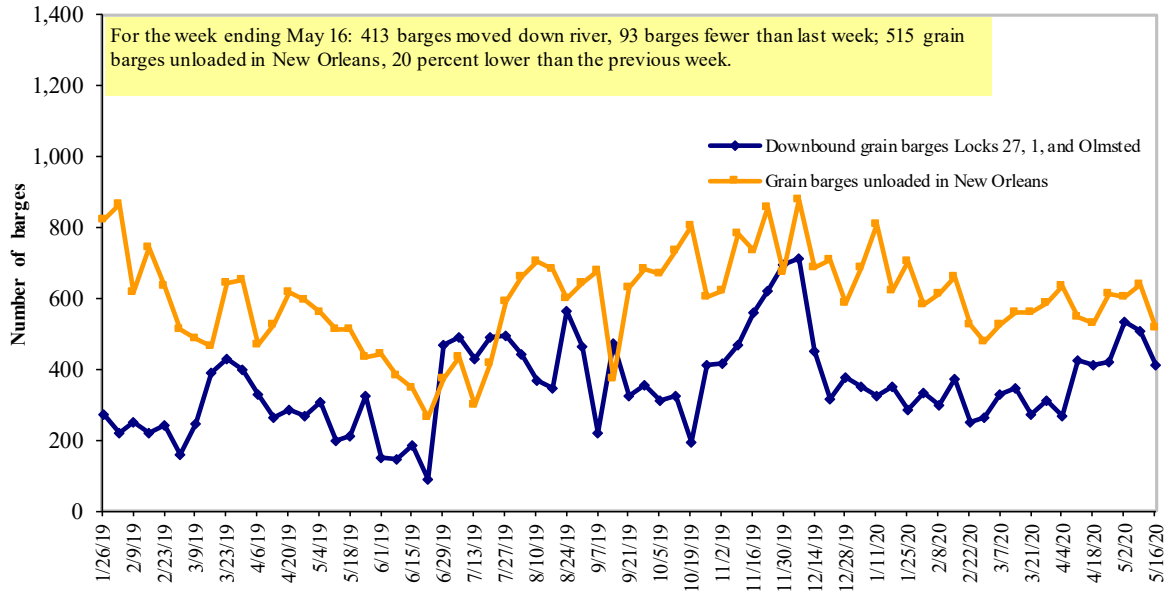
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 5/18/2020 (U.S. $/gallon)

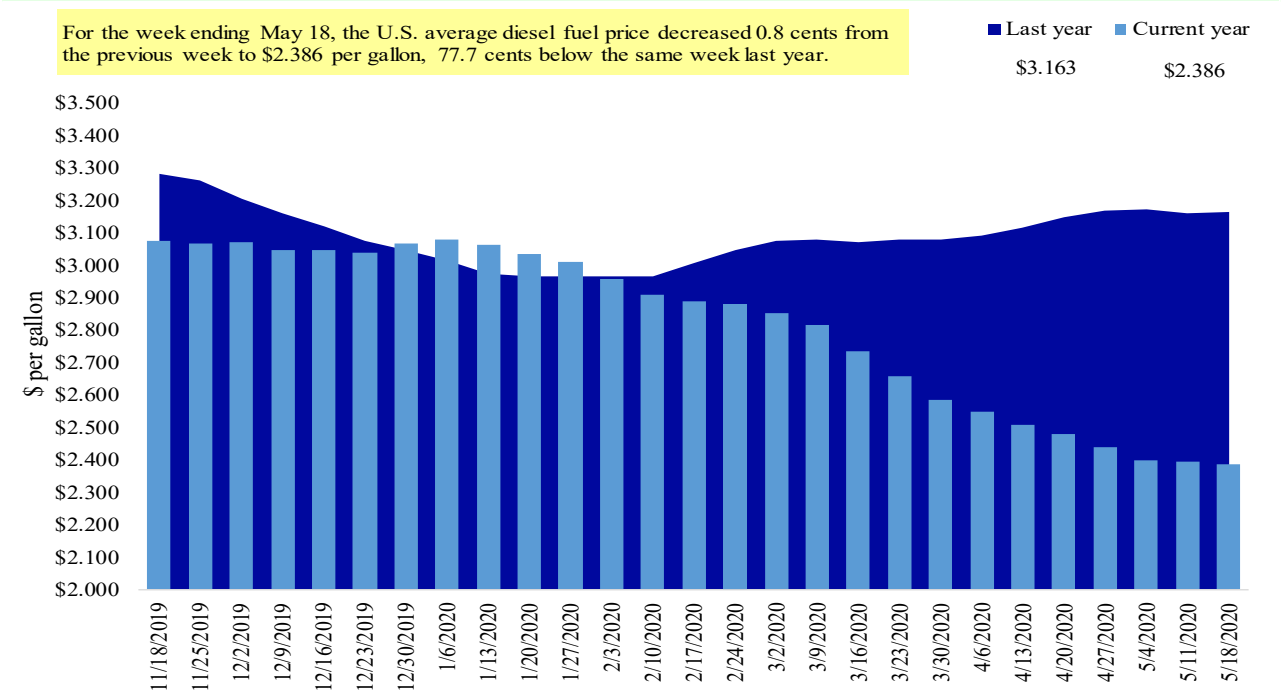
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.491	-0.007	-0.685
	New England	2.620	-0.010	-0.618
	Central Atlantic	2.667	-0.013	-0.708
	Lower Atlantic	2.345	-0.003	-0.685
II	Midwest	2.229	-0.011	-0.820
III	Gulf Coast	2.175	-0.003	-0.732
IV	Rocky Mountain	2.338	-0.008	-0.854
V	West Coast	2.887	-0.013	-0.907
	West Coast less California	2.543	-0.014	-0.809
	California	3.171	-0.011	-0.974
Total	United States	2.386	-0.008	-0.777

[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]									
5/7/2020	1,245	198	1,242	800	101	3,585	13,182	5,702	22,468
This week year ago	1,642	476	738	610	52	3,518	9,897	11,873	25,288
Cumulative exports-marketing year[2]									
2019/20 YTD	8,641	2,243	6,551	4,476	883	22,795	25,413	34,660	82,868
2018/19 YTD	7,700	2,861	6,333	4,807	448	22,149	37,001	33,364	92,514
YTD 2019/20 as % of 2018/19	112	78	103	93	197	103	69	104	90
Last 4 wks. as % of same period 2018/19*	87	44	172	137	240	110	137	45	90
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 5/07/2020	Total commitments[2]			% change current MY from last MY	Exports[3] 3-yr. avg. 2016-18
	2020/21 next MY	2019/20 current MY	2018/19 last MY*		
		- 1,000 mt -			
Mexico	1,738	13,182	14,831	(11)	14,659
Japan	534	8,298	10,525	(21)	11,955
Korea	0	2,042	3,752	(46)	4,977
Colombia	20	3,754	4,278	(12)	4,692
Peru	0	89	1,992	(96)	2,808
Top 5 importers	**2,292**	**27,365**	**35,377**	**(23)**	**39,091**
Total U.S. corn export sales	**3,368**	**38,594**	**46,898**	**(18)**	**54,024**
% of projected exports	6%	85%	89%		
Change from prior week[2]	**555**	**1,073**	**553**		
Top 5 importers' share of U.S. corn export sales	68%	71%	75%		72%
USDA forecast May 2020	**54,707**	**45,165**	**52,545**	**(14)**	
Corn use for ethanol USDA forecast, May 2020	**132,080**	**125,730**	**136,601**	**(8)**	

[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 5/07/2020	Total commitments[2]			% change current MY from last MY	Exports[3] 3-yr. avg. 2016-18
	2020/21 next MY	2019/20 current MY	2018/19 last MY*		
		- 1,000 mt -			- 1,000 mt -
China	572	13,815	13,276	4	25,733
Mexico	501	4,239	4,695	(10)	4,271
Indonesia	0	1,745	1,903	(8)	2,386
Japan	84	2,157	2,204	(2)	2,243
Egypt	0	2,862	2,354	22	1,983
Top 5 importers	**1,157**	**24,819**	**24,431**	**2**	**36,616**
Total U.S. soybean export sales	**1,665**	**40,362**	**45,237**	**(11)**	**53,746**
% of projected exports	3%	88%	95%		
change from prior week[2]	**440**	**656**	**371**		
Top 5 importers' share of U.S. soybean export sales	69%	61%	54%		**68%**
USDA forecast, May 2020	**55,858**	**45,640**	**47,629**	**96**	

[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 5/07/2020	Total commitments[2]			% change current MY from last MY	Exports[3] 3-yr. avg. 2016-18
	2020/21 next MY	2019/20 current MY	2018/19 last MY*		
		- 1,000 mt -			- 1,000 mt -
Philippines	240	3,516	3,209	10	3,047
Mexico	80	3,820	3,300	16	3,034
Japan	200	2,746	2,753	(0)	2,695
Nigeria	33	1,573	1,628	(3)	1,564
Indonesia	0	1,066	1,420	(25)	1,381
Korea	32	1,619	1,439	12	1,355
Taiwan	79	1,423	1,107	29	1,164
Egypt	0	101	818	(88)	821
Thailand	115	876	757	16	747
Iraq	0	262	671	(61)	574
Top 10 importers	**779**	**17,003**	**17,103**	(1)	**16,382**
Total U.S. wheat export sales	**2,284**	**26,380**	**25,667**	**3**	**24,388**
% of projected exports	9%	100%	101%		
change from prior week[2]	**150**	**203**	**114**		
Top 10 importers' share of U.S. wheat export sales	34%	64%	67%		67%
USDA forecast, May 2020	**25,886**	**26,431**	**25,504**	**4**	

[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 05/14/20	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	308	232	133	5,947	5,539	107	83	89	13,961
Corn	261	365	72	3,240	5,220	62	95	81	7,047
Soybeans	69	96	71	2,733	4,018	68	n/a	111	11,969
Total	**638**	**694**	**92**	**11,920**	**14,777**	**81**	**103**	**87**	**32,977**
Mississippi Gulf									
Wheat	41	33	125	1,418	2,282	62	38	62	4,448
Corn	667	785	85	11,244	10,447	108	141	107	20,763
Soybeans	177	332	53	8,925	9,730	92	61	75	31,398
Total	**886**	**1,150**	**77**	**21,588**	**22,458**	**96**	**92**	**92**	**56,609**
Texas Gulf									
Wheat	95	63	151	1,406	2,582	54	50	67	6,009
Corn	30	0	n/a	308	331	93	105	150	640
Soybeans	0	0	n/a	7	0	n/a	n/a	n/a	2
Total	**126**	**63**	**200**	**1,721**	**2,914**	**59**	**59**	**81**	**6,650**
Interior									
Wheat	20	34	58	893	640	140	111	120	1,987
Corn	171	224	76	3,056	2,788	110	108	90	7,857
Soybeans	108	125	86	2,624	2,540	103	92	91	7,043
Total	**299**	**383**	**78**	**6,573**	**5,968**	**110**	**102**	**93**	**16,887**
Great Lakes									
Wheat	0	0	n/a	130	248	52	46	63	1,339
Corn	0	0	n/a	0	0	n/a	n/a	0	11
Soybeans	8	0	n/a	17	53	32	157	57	493
Total	**8**	**0**	**n/a**	**146**	**301**	**49**	**52**	**50**	**1,844**
Atlantic									
Wheat	0	0	n/a	1	32	4	n/a	n/a	37
Corn	0	0	n/a	8	56	14	114	84	99
Soybeans	7	8	92	362	511	71	59	38	1,353
Total	**7**	**8**	**92**	**371**	**600**	**62**	**63**	**41**	**1,489**
U.S. total from ports*									
Wheat	464	361	128	9,795	11,323	87	65	80	27,781
Corn	1,130	1,375	82	17,857	18,843	95	119	96	36,417
Soybeans	370	562	66	14,667	16,852	87	85	82	52,258
Total	**1,965**	**2,298**	**85**	**42,319**	**47,019**	**90**	**93**	**89**	**116,457**

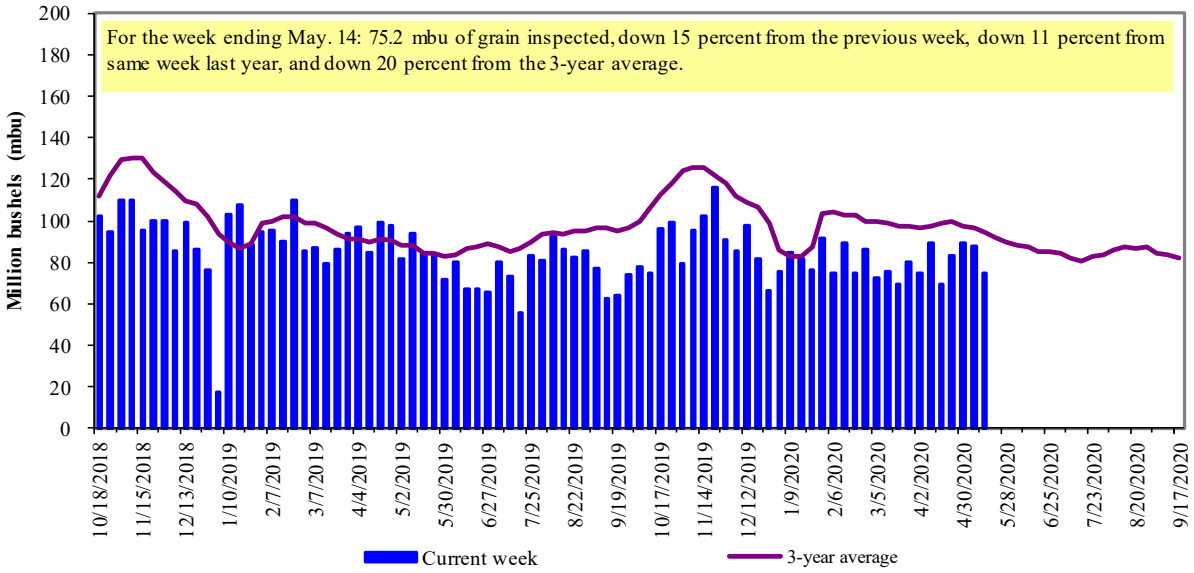
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

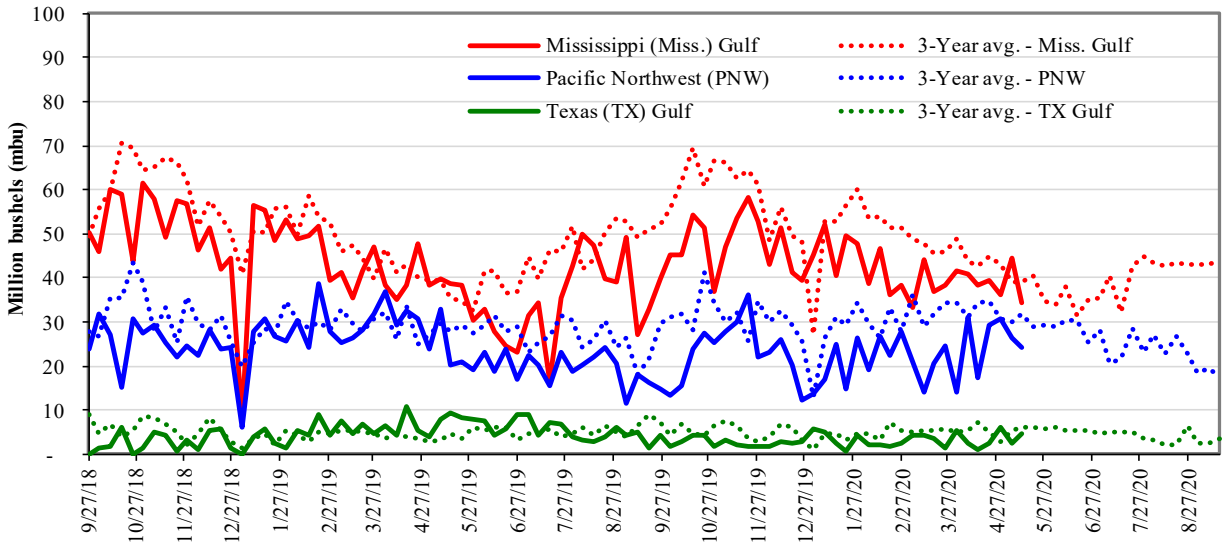


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 05/14/20 inspections (mbu):	
MS Gulf:	34.3
PNW:	24.1
TX Gulf:	4.7

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	down 23	up 103	down 16	down 9
Last Year (same wk):	down 11	down 49	down 18	up 19
3-yr avg. (4-wk. mov. Avg):	down 17	down 3	down 16	down 24

Source: USDA, Federal Grain Inspection Service.

Table 17

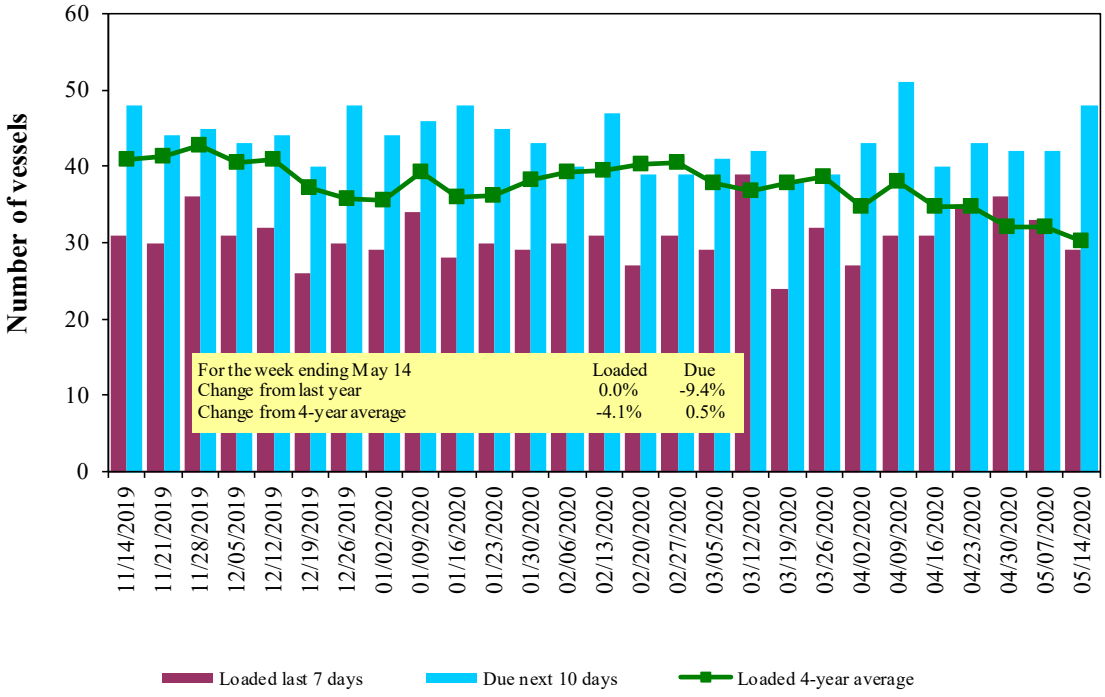
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
5/14/2020	22	29	48	13
5/7/2020	22	33	42	15
2019 range	(26…61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service.

Figure 16

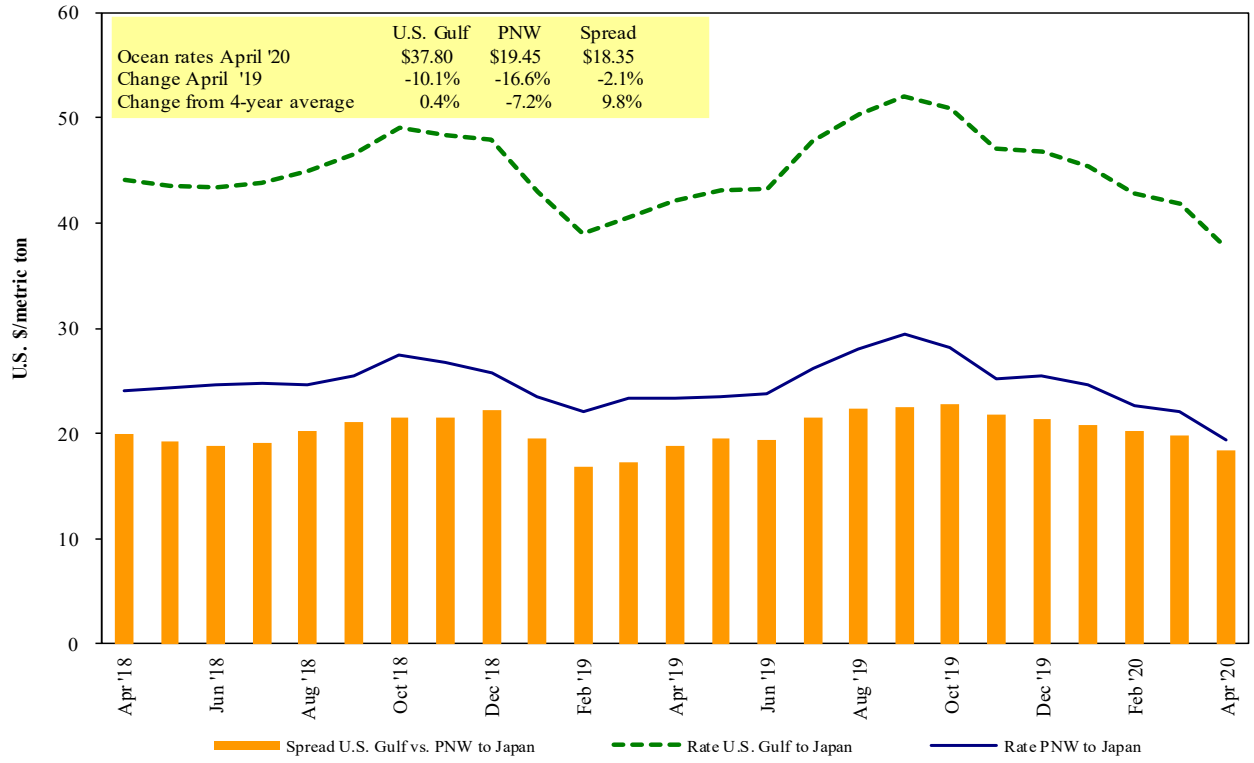
U.S. Gulf[1] vessel loading activity



[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 05/16/2020

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
U.S. Gulf	Pt Sudan	Sorghum	Jun 5/15	33,370	99.50
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	China	Heavy grain	May 20/30	69,000	21.00
Brazil	China	Heavy grain	May 19/29	66,000	21.50
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

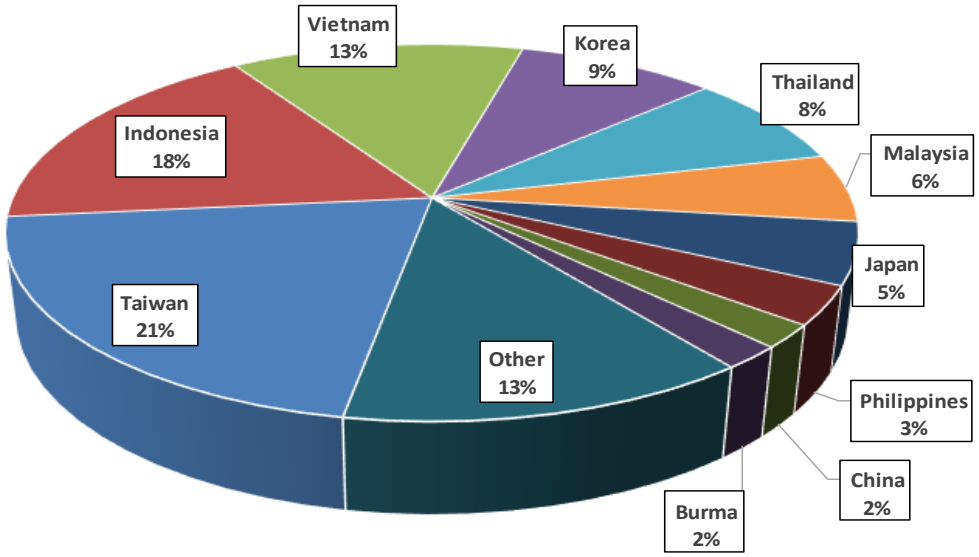
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

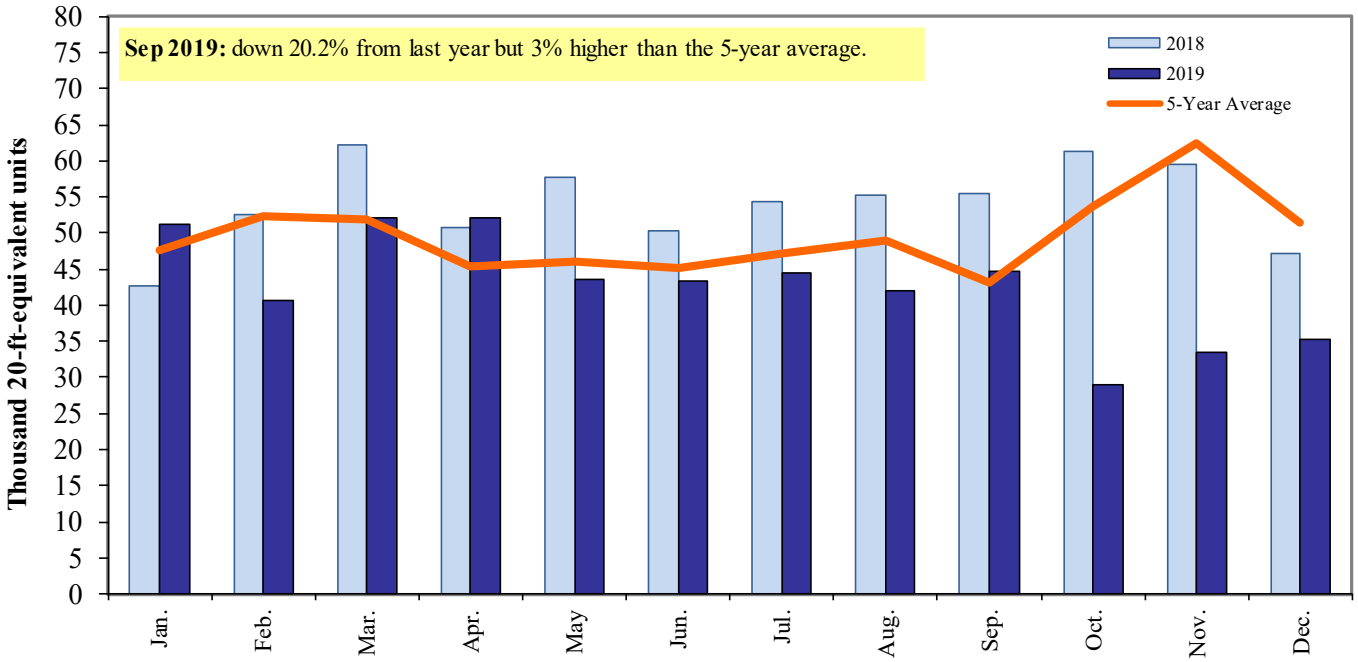
Figure 18
Top 10 destination markets for U.S. containerized grain exports, 2019



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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