USDA United States Department of Agriculture

Grain Transportation Report

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

Contact Us

June 25, 2020

Contents

The next release is July 2, 2020

WEEKLY HIGHLIGHTS

FMC Adopts Final Rule for Easing Publication Requirements for Ocean Carriers

The U.S. Federal Maritime Commission (FMC) adopted a final rule, effective June 25, 2020, that relaxes certain publication requirements for ocean container carriers in response to a 2018 petition from the World Shipping Council. The new rule amends the FMC's regulations governing service contracts to eliminate requirements for ocean carriers to publish "essential terms" for individual service contracts. Essential terms include the origin and destination port ranges, commodities involved, minimum volumes, and the service contract duration. FMC still requires all service contracts to be filed.

FMCSA Extends Waiver for CDL Permit Renewal

Effective July 1, the Federal Motor Carrier Safety Administration (FMCSA) has extended, through September 30, its waiver to renew expired commercial driver's licenses (CDLs), medical cards, and commercial learner's permits (CLP). The waiver is in response to closures of state motor vehicle departments due to the COVID-19 pandemic. The extension grants CDL holders, CLP holders, and non-CDL drivers relief from the same motor carrier regulations as the initial March 24 waiver. Also, like the initial waiver, the extension does not allow CDL or CLP holders to extend their licenses if their license credentials or medical cards expired before March 1, 2020, or if their driver's privileges have been suspended or withdrawn for traffic offenses. It also does not waive knowledge and skills testing requirements. FMCSA also reissued a separate Notice of Enforcement Policy, affirming it will not take action against a driver for operating a commercial vehicle if the driver held a valid CDL on February 29, 2020, or against carriers employing those drivers.

Grain Transportation Report Temporarily Replaces Figure 8 Barge Chart

With the upcoming Illinois River lock closures, markets for barged grain freight will be thin or nonexistent for the majority of the river. For this reason, figure 8 (normally, on p. 11), which provides a graph of Illinois River barge rates, has been replaced by **figure 8a**, which will track the rates on the mid-Mississippi river. Until the Illinois River locks reopen, the mid-Mississippi rates will be the benchmark for delivery contracts governed by the Chicago Mercantile Exchange. Therefore, figure 8a will be temporarily published as a proxy for figure 8 as an indicator for barged grain shipping and grain markets. Data will still be collected for Figure 8, when available, and be located in the online datasets. When the Illinois River locks reopen, figure 8 will return to the *GTR*.

FMCSA Extends Waiver Allowing CLP Holders To Drive Without CDL Holder Supervising

FMCSA is extending a waiver from the requirement that commercial learner's permit holders (CLP) be accompanied by a commercial driver's license (CDL) holder in the front seat of the truck. Originally set to expire on June 30, the waiver is extended until September 30. The waiver still requires a CDL holder to be somewhere in the cab with the CLP holder. CLP holders operating under the waiver must also have evidence from their CDL tester that they have passed the CDL skills test and have a valid non-CDL driver's license, CLP, and medical certificate. However, they do not need the medical certificate if they are covered by FMCSA's waiver regarding expiring CDLs, CLPs and medical examiners' certificates (effective July 1, 2020).

Snapshots by Sector

Export Sales

For the week ending June 11, **unshipped balances** of wheat, corn, and soybeans totaled 23.6 million metric tons (mmt). This represented a 2-percent decrease in outstanding sales from the same time last year. Net **corn export sales** were 0.358 mmt, down 46 percent from the past week. Net **soybean export sales** were 0.538 mmt, down 46 percent from the previous week. Net weekly **wheat export sales** for the 2020/21 marketing year, which began June 1, were 0.505 mmt.

Rail

U.S. Class I railroads originated 21,374 **grain carloads** during the week ending June 13. This was 2 percent more than the previous week, 4 percent less than last year, and 6 percent less than the 3-year average.

Average July shuttle **secondary railcar** bids/offers (per car) were $63 below tariff for the week ending June 18. This was $13 more than last week and $263 lower than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending June 20, **barge grain movements** totaled 1,091,741 tons. This was 16 percent more than the previous week and 575 percent more than the same period last year.

For the week ending June 20, 701 grain barges **moved down river**—84 more barges than the previous week. There were 646 grain barges **unloaded in New Orleans**, 26 percent more than the previous week.

Ocean

For the week ending June 18, 31 **oceangoing grain vessels** were loaded in the U.S. Gulf—48 percent more than the same period last year. Within the next 10 days (starting June 19), 38 vessels were expected to be loaded—3 percent fewer than the same period last year.

As of June 18, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $37.75. This was 6 percent more than the previous week. The rate from the Pacific Northwest to Japan was $20.00 per mt, 7 percent more than the previous week.

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Web: **http://dx.doi.org/10.9752/TS056.06-25-2020**

Feature Article/Calendar

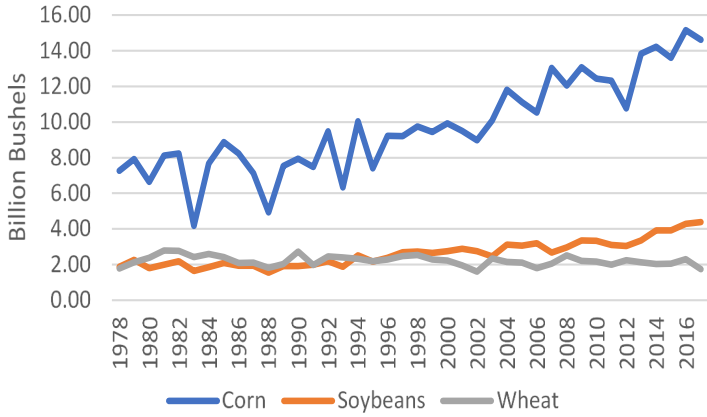
USDA's Open Data Platform: Transportation of U.S. Grains—A Modal Share Analysis

On June 1, Transportation Services Division (TSD) of USDA's Agricultural Marketing Service (AMS) launched an upgraded version–AgTransport 2.0–of its Agricultural Transportation Open Data Platform. The upgrade incorporates new data and stories on various transportation modes and ag-transport-related issues. In particular, as this article describes, new data and an accompanying story have been added to create a digitized and interactive version of the annual publication, *Transportation of U.S. Grain: A Modal Share Analysis*. With the platform's flexible and interactive charts, stakeholders can now quickly locate needed data on the modal share analysis related to the transportation of U.S. grains domestically and internationally for multiple years.

The Transportation of U.S. Grains: A Modal Share Analysis page on AgTransport 2.0 shows the modal breakdown of grains produced in the United States and moved to domestic and foreign markets by barge, rail, and truck. Waterborne Commerce Statistics of the U.S. Army Corps of Engineers is used for the analysis to calculate tonnages of barged grain, and the Carload Waybill Sample from the Surface Transportation Board is used to estimate the amount of railed grain. Trucking data are derived from known grain production data, as compared to the estimates of railed and barged volumes of grain.

Figure 1 shows the amounts of U.S. corn, soybeans, and wheat produced from 1978 to 2017. Corn production increased significantly during this time, driven by an increase in food, feed, and ethanol production. Also, from 1978 onward, soybean production steadily increased in response to rising global demand for soybeans and soybean derivatives. In 2017, harvests yielded 14.6 billion bushels of corn, 4.39 billion bushels of soybeans, and 1.74 billion bushels of wheat. U.S. corn, soybean, and wheat production data are updated annually and currently are available for 1978-2017. On the platform, figure 1 can be filtered by commodity type, which adjusts the vertical axis numbers, as needed, to highlight selected commodity trends.

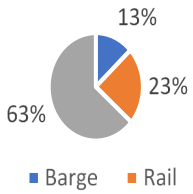
Figure 1. U.S. Corn, Soybeans and Wheat Production



Source: USDA, National Agricultural Statistics Service.

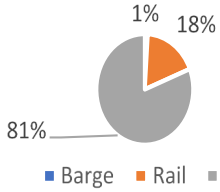
Modal share summaries. Transport modes are categorized according to the final movement going to domestic markets or ports for exports. These modes facilitate a highly competitive global agricultural market, connecting U.S. grain producers with domestic and foreign consumers. Charts on the platform display trends regarding transportation used to move grains grown for the food. feed, and other uses. Updates are available annually for modal share data and currently are available for 1984-2017.

Figure 2. Modal Share Summary -Total



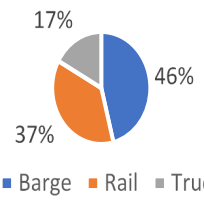
Note: Modal share data for 2017.
Source: USDA, Agricultural Marketing Service.

Figure 3. Modal Share Summary - Domestic



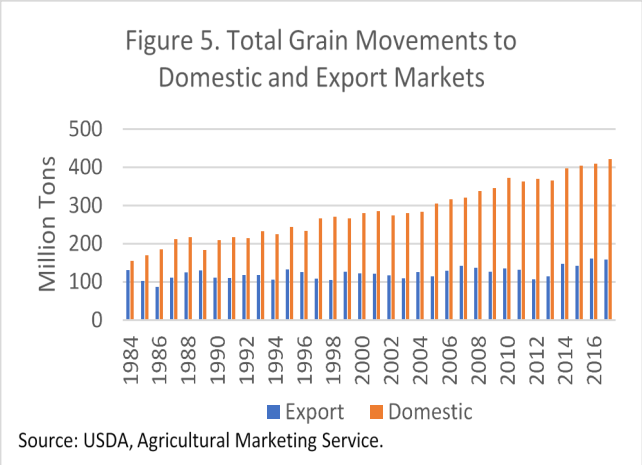
Note: Modal share data for 2017.
Source: USDA, Agricultural Marketing Service.

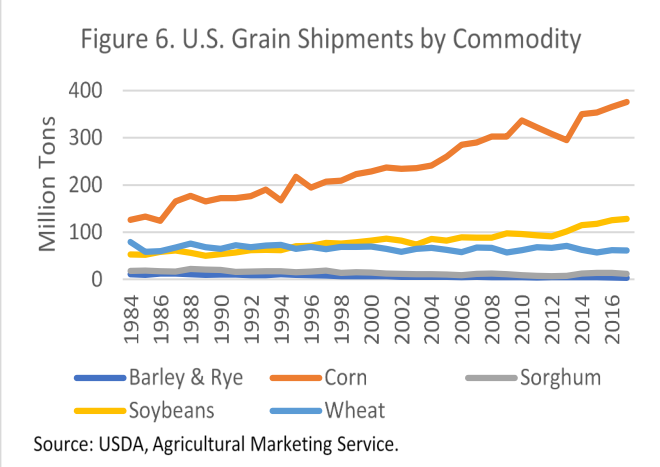
Figure 4. Modal Share Summary - Export



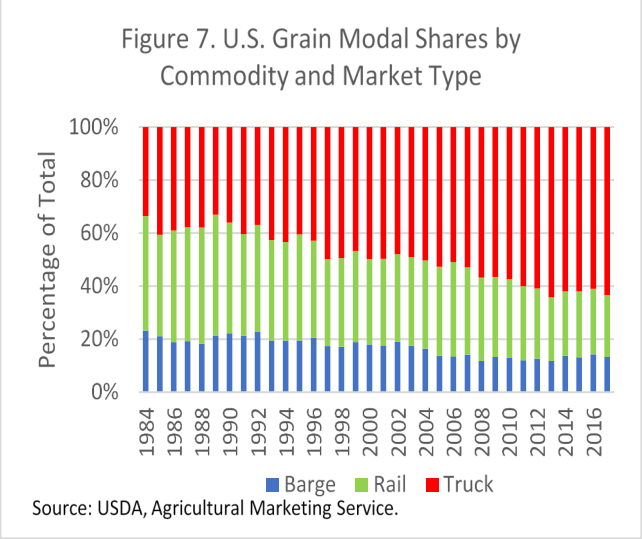
Note: Modal share data for 2017.
Source: USDA, Agricultural Marketing. Service.

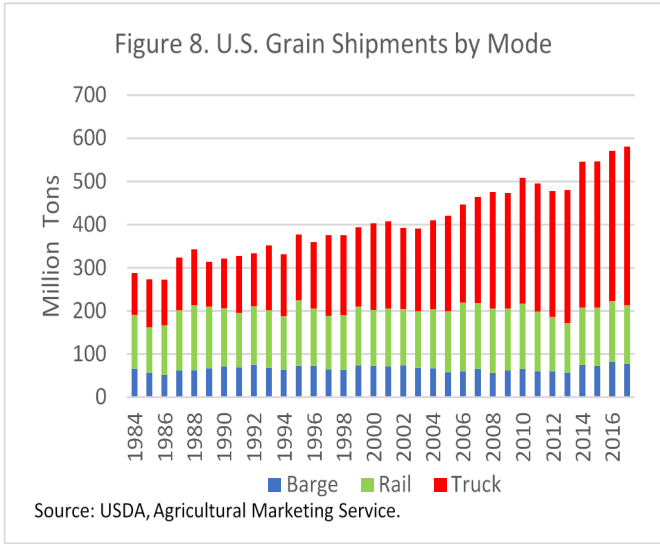
In 2017, for domestic and export markets combined, 63 percent of U.S grains were transported by truck; 23 percent were transported by rail; and 13 percent were transported by barge (fig. 2). Figure 3 shows, for domestic markets, 81 percent of U.S. grains were transported by truck; 18 percent were transported by rail; and 2 percent were transported by barge. For export markets, 46 percent of U.S. grains were transported by barge; 37 percent were transported by rail; and 17 percent were transported by truck (fig. 4). On the platform, the charts in figures 2-4 can be filtered by year and commodity to further analyze trends.





In 2017, total grain movements to domestic markets were 421 million tons, and total grain movements to export markets were 158 million tons (fig. 5). Figure 6 shows U.S. grain shipments for corn, wheat, sorghum, soybeans, barley, and rye. Corn shipments have continued to rise significantly because of increased demand for food, animal feed, and ethanol fuel. Other U.S. grain shipments have slightly increased or remained steady over time, compared to corn. On the platform, the graph displayed here as figure 4 can be filtered by commodity and mode, and the graph displayed here as figure 5 can be filtered by commodity, mode, and market type (i.e., export or domestic).





Finally, figures 7 and 8 show trends over time in shipments of U.S. grains to domestic and export markets. In 1984, U.S. grains to domestic and export markets mostly shipped by rail at 125 million tons. In contrast, by 2017, truck shipments, at 368 million tons, more than doubled the U.S. grain shipped by rail and barge. Figures 6 and 7 can be filtered for further analysis by commodity and market type on the platform.

To access the interactive versions of the charts and graphs included in this article, please visit AgTransport 2.0.

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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
06/24/20	163	n/a	220	n/a	169	142
06/17/20	161	n/a	226	149	159	133

[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)

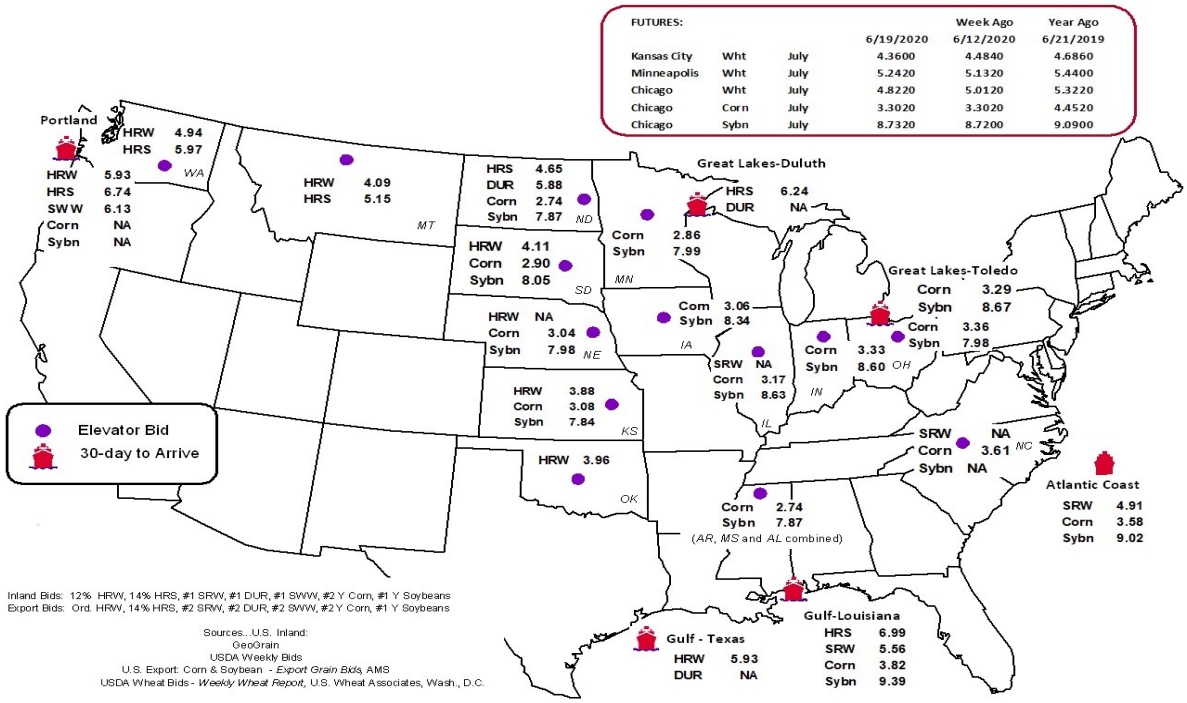
Commodity	Origin–destination	6/19/2020	6/12/2020
Corn	IL–Gulf	-0.65	-0.62
Corn	NE–Gulf	-0.78	-0.77
Soybean	IA–Gulf	-1.05	-0.99
HRW	KS–Gulf	-2.05	-1.96
HRS	ND–Portland	-2.09	-2.11

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



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]
6/17/2020[p]	431	1,113	4,913	123	6,580	6/13/2020	2,798
6/10/2020[r]	232	844	4,862	279	6,217	6/6/2020	2,015
2020 YTD[r]	10,505	21,208	116,407	4,975	153,095	2020 YTD	57,334
2019 YTD[r]	22,780	29,384	134,447	8,765	195,376	2019 YTD	56,217
2020 YTD as % of 2019 YTD	46	72	87	57	78	% change YTD	102
Last 4 weeks as % of 2019[2]	26	94	100	75	86	Last 4wks. % 2019	115
Last 4 weeks as % of 4-year avg.[2]	62	87	87	91	85	Last 4wks. % 4 yr.	100
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.

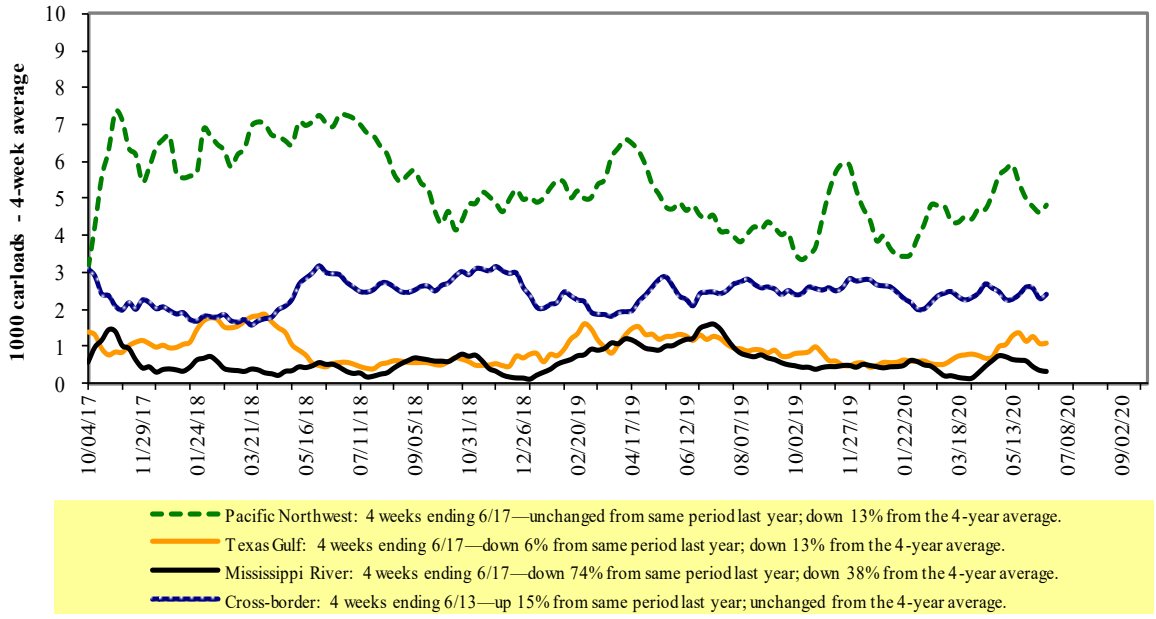
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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	
6/13/2020	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,384	2,654	10,971	873	5,492	21,374	3,807	4,968
This week last year	1,482	3,117	11,382	1,121	5,254	22,356	5,169	4,530
2020 YTD	40,559	55,971	256,687	24,804	119,130	497,151	93,644	105,090
2019 YTD	46,195	67,924	263,779	26,823	122,608	527,329	105,518	103,676
2020 YTD as % of 2019 YTD	88	82	97	92	97	94	89	101
Last 4 weeks as % of 2019*	99	77	98	88	115	99	98	113
Last 4 weeks as % of 3-yr. avg.**	96	81	89	97	108	93	108	106
Total 2019	91,611	137,124	568,369	58,527	260,269	1,115,900	212,530	235,892

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

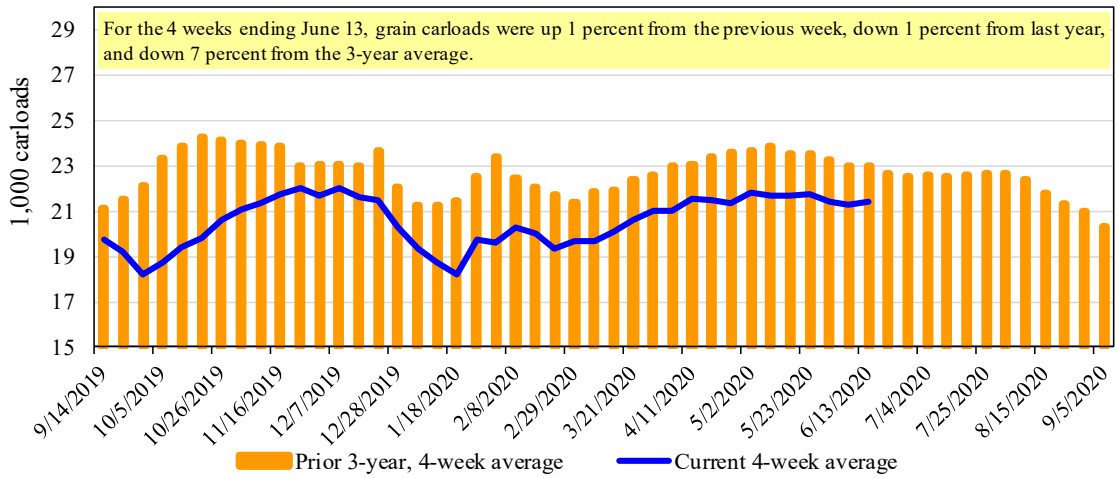
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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							
6/18/2020		Jul-20	Jul-19	Aug-20	Aug-19	Sep-20	Sep-19	Oct-20	Oct-19
BNSF[3]	COT grain units	0	0	no bids	no bids	no bids	0	no bids	no bids
	COT grain single-car	0	0	no bids	0	0	49	0	51
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 bids	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.

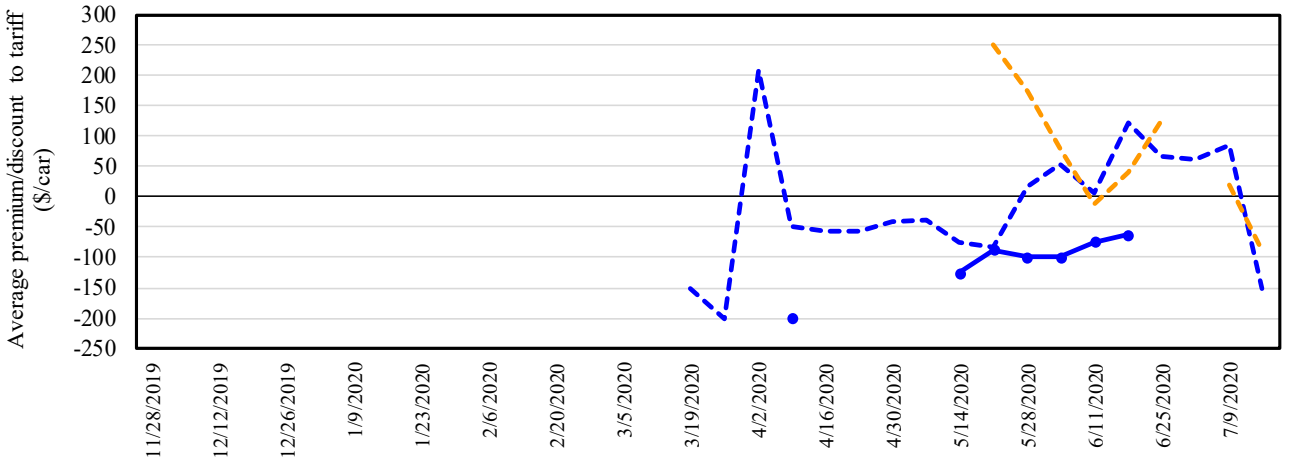
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 July 2020, secondary market

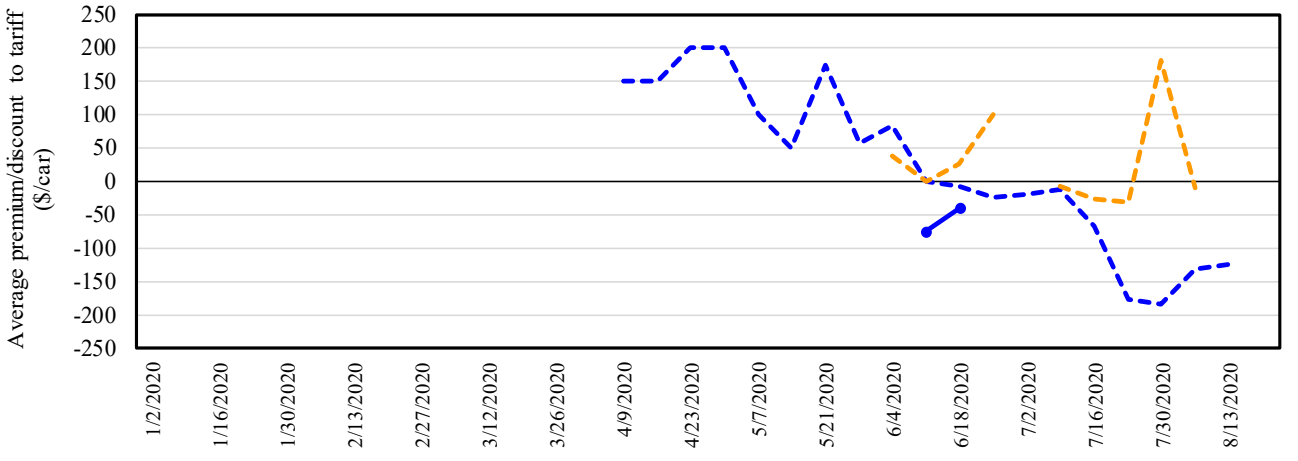


6/18/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$150	$25

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $13 this week and 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.

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



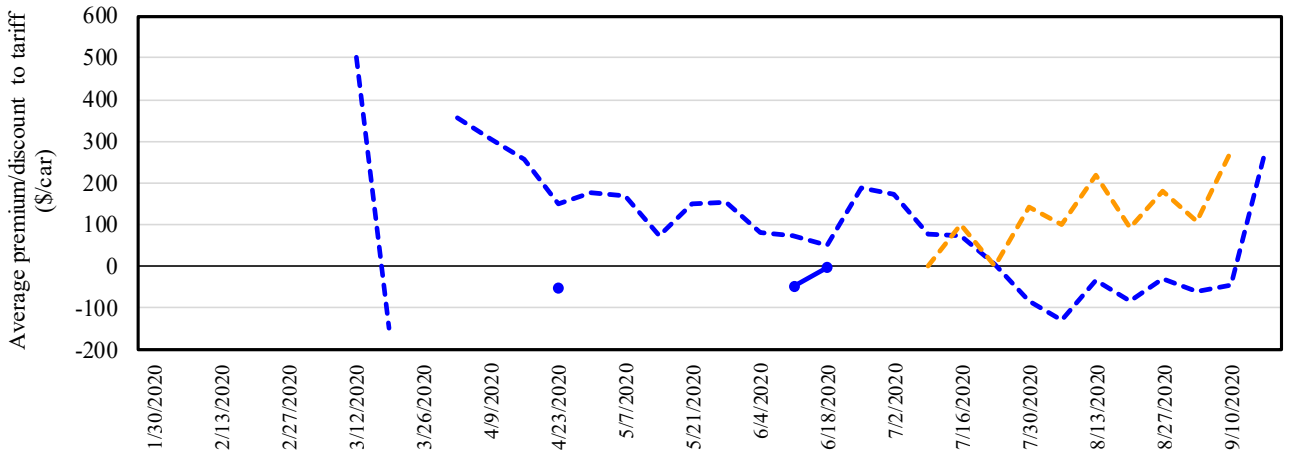
6/18/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$50	-$31

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $34 this week and 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.

Figure 6

Bids/offers for railcars to be delivered in September 2020, secondary market



6/18/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$29	-$32

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $46 this week and 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: 6/18/2020	Delivery period					
		Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-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)**	**(50)**	**29**	**n/a**	**200**	**n/a**
	Change from last week	25	n/a	35	n/a	(100)	n/a
	Change from same week 2019	(475)	(50)	29	n/a	n/a	n/a
	UP-Pool	**25**	**(31)**	**(32)**	**350**	**350**	**150**
	Change from last week	0	44	57	100	n/a	n/a
	Change from same week 2019	(50)	69	69	450	n/a	n/a

[1]Average premium/discount to tariff, $/car-last week.

Note: Bids listed are market indicators only and are not guaranteed prices. n/a = not available; GF = guaranteed freight; Pool = guaranteed pool; BNSF = BNSF Railway; UP = Union Pacific Railroad.

Data from James B. Joiner Co., Tradewest Brokerage Co.

Source: USDA, Agricultural Marketing Service.

The **tariff rail rate** is the base price of freight rail service. Together with **fuel surcharges** and any **auction and secondary rail** values, the tariff rail rate constitutes the full cost of shipping by rail. Typically, auction and secondary rail values are a small fraction of the full cost of shipping by rail relative to the tariff rate. However, during times of high rail demand or short supply, high auction and secondary rail values can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

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

June 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	$40	$39.96	$1.09	-2
	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	0
	Wichita, KS	New Orleans, LA	$4,525	$71	$45.64	$1.24	-2
	Sioux Falls, SD	Galveston-Houston, TX	$6,976	$0	$69.28	$1.89	0
	Colby, KS	Galveston-Houston, TX	$4,801	$78	$48.45	$1.32	-3
	Amarillo, TX	Los Angeles, CA	$5,121	$109	$51.93	$1.41	-3
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,900	$80	$39.53	$1.00	-5
	Toledo, OH	Raleigh, NC	$6,816	$0	$67.69	$1.72	4
	Des Moines, IA	Davenport, IA	$2,415	$17	$24.15	$0.61	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	$50	$38.23	$0.97	-4
	Des Moines, IA	Los Angeles, CA	$5,680	$146	$57.85	$1.47	-5
Soybeans	Minneapolis, MN	New Orleans, LA	$3,631	$52	$36.58	$1.00	-4
	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	$80	$46.93	$1.28	-5
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	0
	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	$128	$60.97	$1.66	-3
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	$80	$38.73	$0.98	-3
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	0
	Des Moines, IA	Amarillo, TX	$4,220	$63	$42.53	$1.08	1
	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	$93	$49.33	$1.34	-1
	Toledo, OH	Huntsville, AL	$4,805	$0	$47.72	$1.30	4
	Grand Island, NE	Portland, OR	$5,260	$131	$53.53	$1.46	-11

[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: June 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	$56	$69.79	$1.90	1
	KS	Guadalajara, JA	$7,534	$329	$80.34	$2.18	-1
	TX	Salinas Victoria, NL	$4,329	$33	$44.57	$1.21	-1
Corn	IA	Guadalajara, JA	$8,902	$273	$93.75	$2.38	0
	SD	Celaya, GJ	$8,140	$0	$83.17	$2.11	3
	NE	Queretaro, QA	$8,278	$112	$85.73	$2.18	-1
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,643	$109	$79.21	$2.01	-1
	SD	Torreon, CU	$7,690	$0	$78.57	$1.99	3
Soybeans	MO	Bojay (Tula), HG	$8,547	$256	$89.94	$2.45	-2
	NE	Guadalajara, JA	$9,172	$265	$96.42	$2.62	-1
	IA	El Castillo, JA	$9,490	$0	$96.97	$2.64	4
	KS	Torreon, CU	$7,964	$179	$83.20	$2.26	0
Sorghum	NE	Celaya, GJ	$7,772	$239	$81.85	$2.08	-1
	KS	Queretaro, QA	$8,108	$70	$83.55	$2.12	0
	NE	Salinas Victoria, NL	$6,713	$56	$69.16	$1.75	0
	NE	Torreon, CU	$7,092	$162	$74.12	$1.88	-2

[1]Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75-110 cars that meet railroad efficiency requirements.

[2]Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

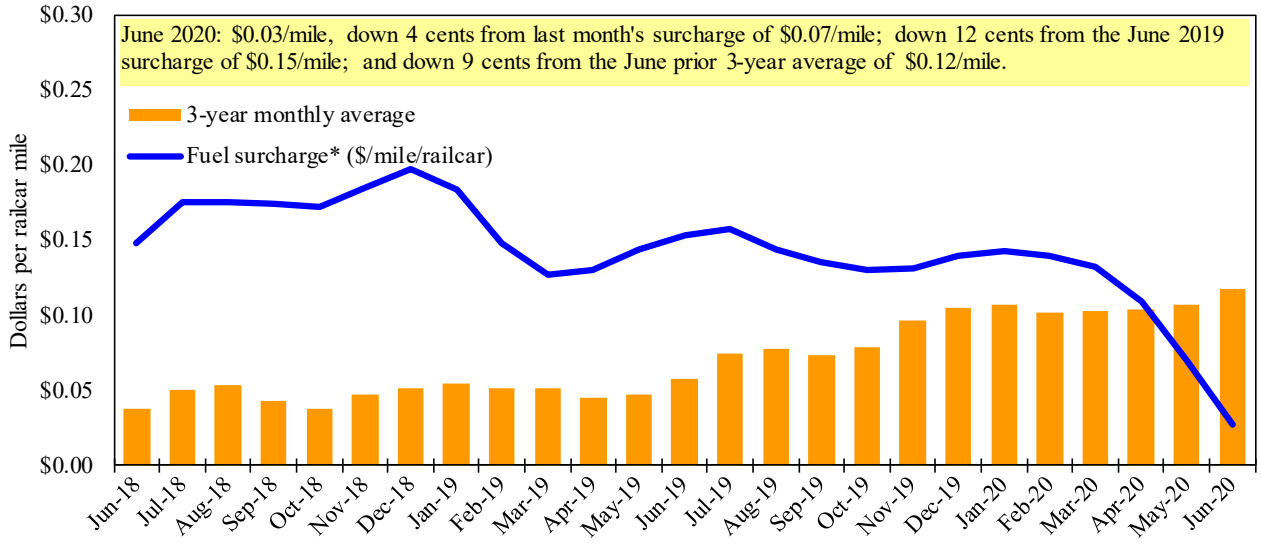
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

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

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

Figure 7

Railroad fuel surcharges, North American weighted average[1]



[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.

* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

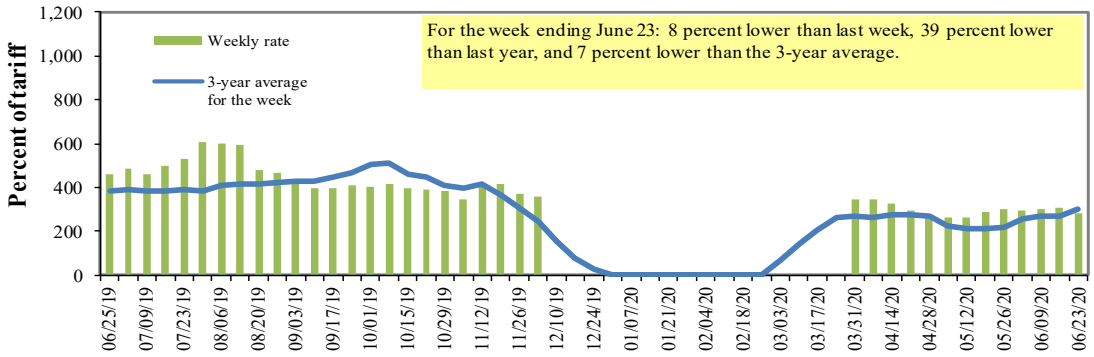
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.

Sources: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Barge Transportation

Figure 8a

Mid-Mississippi 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]	6/23/2020	367	283	-	200	183	183	182
	6/16/2020	369	308	268	191	184	184	181
$/ton	6/23/2020	22.72	15.06	-	7.98	8.58	7.39	5.71
	6/16/2020	22.84	16.39	12.44	7.62	8.63	7.43	5.68
Current week % change from the same week:								
	Last year	-23	-39	-	-	-33	-33	-35
	3-year avg. [2]	-19	-33	-	-33	-37	-38	-29
Rate[1]	July	368	294	-	200	184	184	183
	September	405	393	-	359	375	375	351

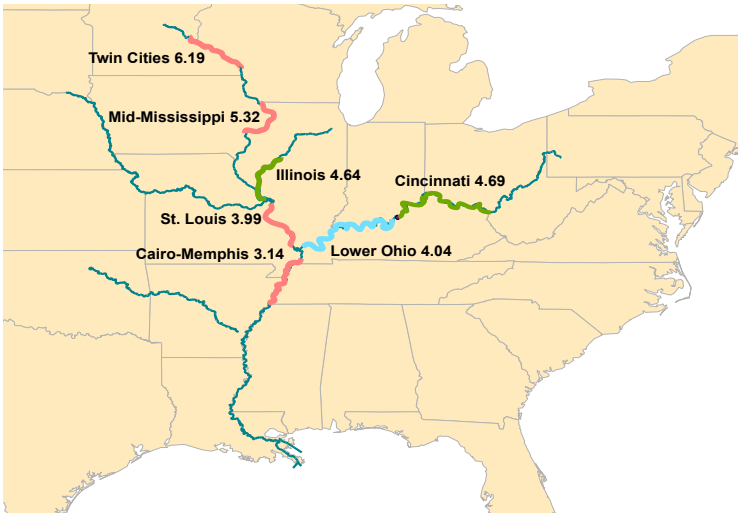
[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds; "-" not available due to closure.

Source: USDA, Agricultural Marketing Service.

Figure 9
Benchmark tariff rates

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

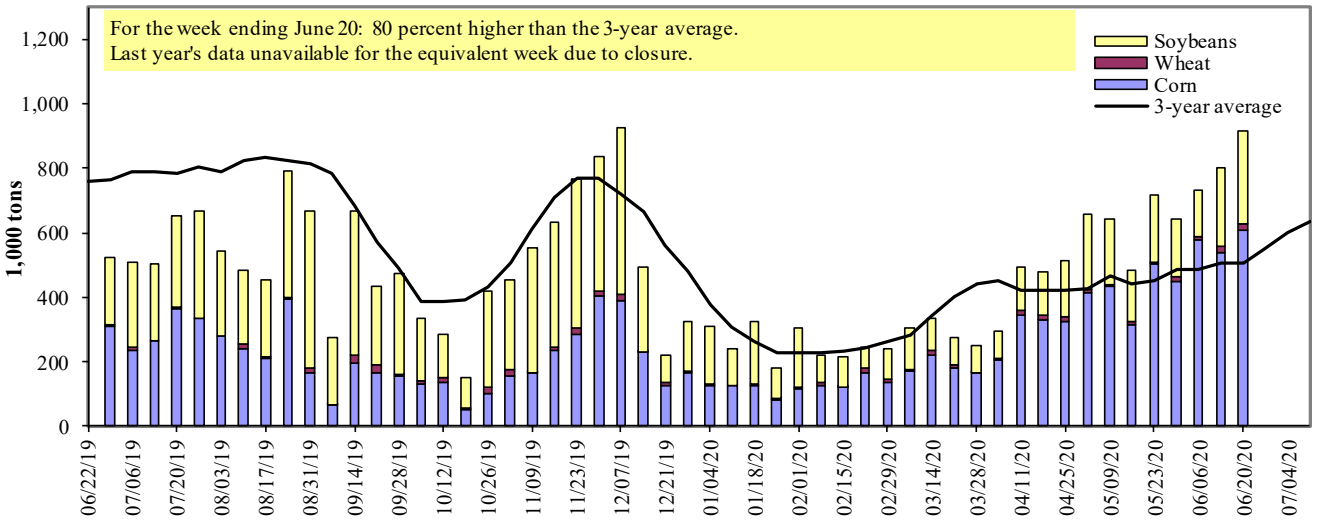
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 06/20/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	214	6	144	8	372
Winfield, MO (L25)	383	10	146	8	546
Alton, IL (L26)	592	17	288	11	908
Granite City, IL (L27)	610	17	289	30	946
Illinois River (La Grange)	155	6	124	3	289
Ohio River (Olmsted)	22	0	44	0	66
Arkansas River (L1)	0	52	28	0	80
Weekly total - 2020	632	69	361	30	1,092
Weekly total - 2019	73	23	64	2	162
2020 YTD[1]	9,010	823	5,655	81	15,568
2019 YTD[1]	5,595	899	4,197	71	10,762
2020 as % of 2019 YTD	161	92	135	114	145
Last 4 weeks as % of 2019[2]	462	310	231	1,991	352
Total 2019	12,780	1,631	14,683	154	29,247

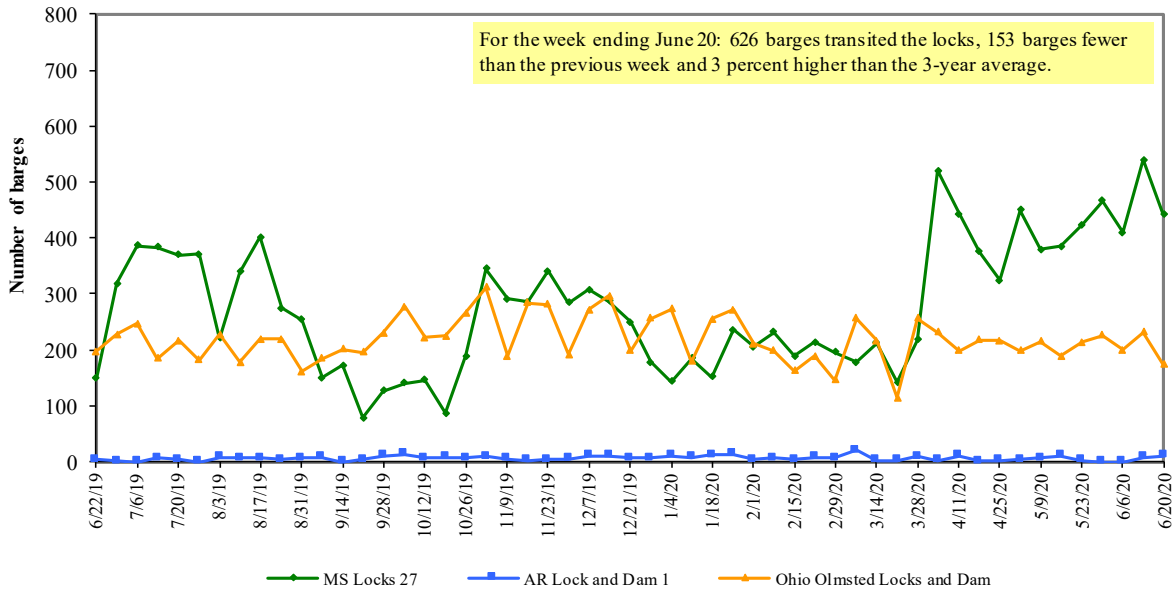
[1] Weekly total, YTD (year-to-date), and calendar year total include MS/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. L (as in "L15") refers to a lock or lock and dam facility. Olmsted = Olmsted Locks and Dam. La Grange = La Grange Lock and Dam.

[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

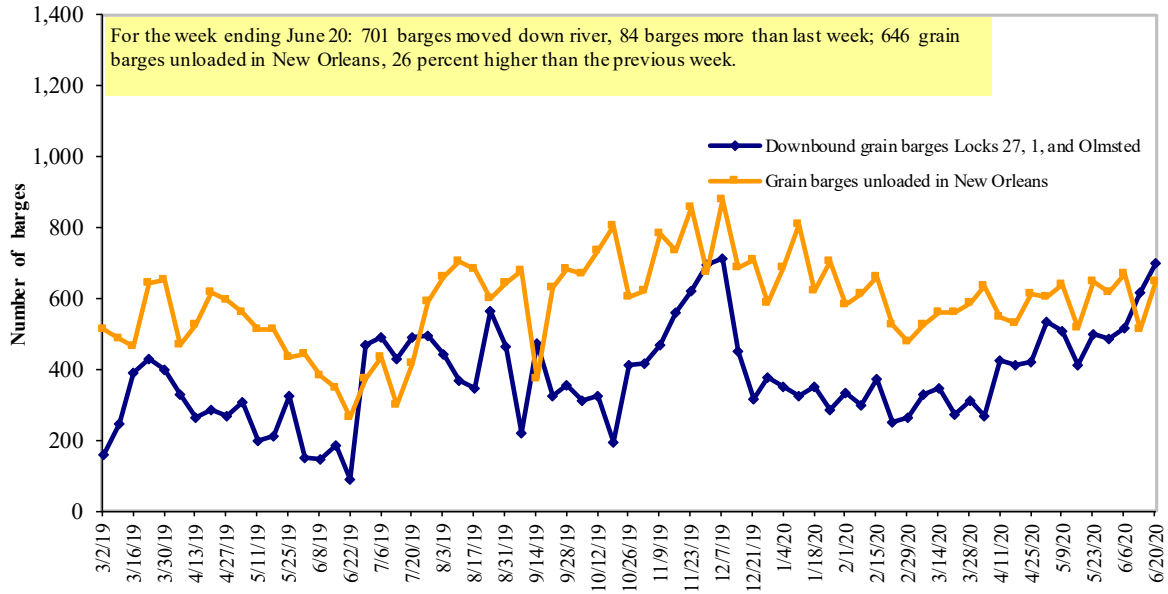
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 6/22/2020 (U.S. $/gallon)

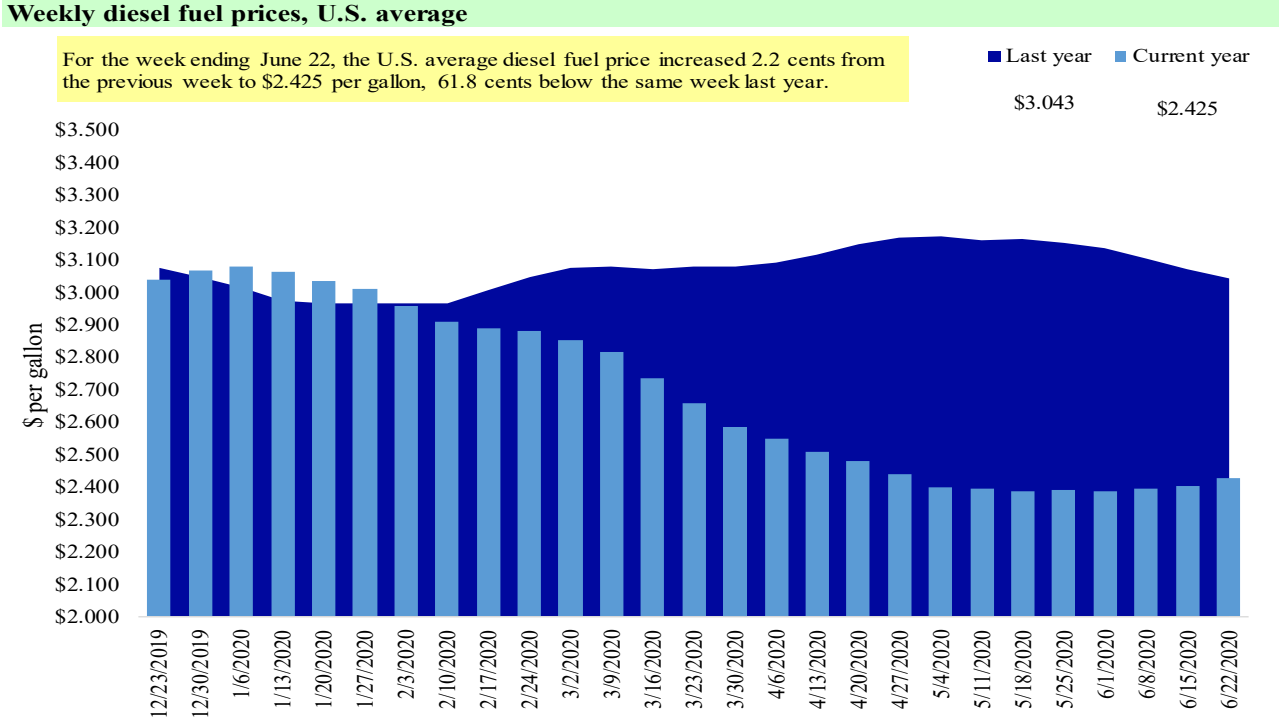
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.515	0.014	-0.564
	New England	2.631	0.003	-0.505
	Central Atlantic	2.694	0.021	-0.564
	Lower Atlantic	2.370	0.011	-0.576
II	Midwest	2.289	0.033	-0.637
III	Gulf Coast	2.197	0.023	-0.600
IV	Rocky Mountain	2.353	0.007	-0.677
V	West Coast	2.945	0.015	-0.686
	West Coast less California	2.591	0.012	-0.615
	California	3.237	0.019	-0.731
Total	United States	2.425	0.022	-0.618

[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]									
6/11/2020	2,039	571	1,767	1,059	238	5,674	10,361	7,593	23,629
This week year ago	2,146	896	1,358	946	179	5,525	6,545	11,101	23,171
Cumulative exports-marketing year[2]									
2019/20 YTD	289	18	130	175	49	659	31,130	36,606	68,395
2018/19 YTD	454	46	173	105	33	811	41,900	36,327	79,038
YTD 2019/20 as % of 2018/19	64	38	75	166	147	81	74	101	87
Last 4 wks. as % of same period 2018/19*	66	39	105	93	82	76	171	64	97
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 6/11/2020	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	1,688	13,692	15,020	(9)	14,659
Japan	542	9,325	11,721	(20)	11,955
Korea	0	2,502	3,694	(32)	4,977
Colombia	20	4,169	4,534	(8)	4,692
Peru	40	248	1,992	(88)	2,808
Top 5 importers	**2,290**	**29,937**	**36,961**	**(19)**	**39,091**
Total U.S. corn export sales	**3,553**	**41,491**	**48,445**	**(14)**	**54,024**
% of projected exports	6%	92%	92%		
Change from prior week[2]	**115**	**358**	**38**		
Top 5 importers' share of U.S. corn export sales	64%	72%	76%		72%
USDA forecast June 2020	**54,707**	**45,165**	**52,545**	**(14)**	
Corn use for ethanol USDA forecast, June 2020	**132,080**	**124,460**	**136,601**	**(9)**	

[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 6/11/2020	Total commitments[2]			% change	Exports[3]
	2020/21	2019/20	2018/19	current MY	3-yr. avg.
	next MY	current MY	last MY*	from last MY	2016-18
		- 1,000 mt -			- 1,000 mt -
China	3,048	15,603	13,637	14	25,733
Mexico	575	4,542	4,772	(5)	4,271
Indonesia	0	1,891	2,080	(9)	2,386
Japan	87	2,317	2,408	(4)	2,243
Egypt	0	3,339	2,645	26	1,983
Top 5 importers	**3,710**	**27,691**	**25,541**	**8**	**36,616**
Total U.S. soybean export sales	**5,534**	**44,199**	**47,428**	**(7)**	**53,746**
% of projected exports	10%	98%	100%		
change from prior week[2]	**1,382**	**538**	**509**		
Top 5 importers' share of U.S. soybean export sales	67%	63%	54%		**68%**
USDA forecast, June 2020	**55,858**	**44,959**	**47,629**	**94**	

[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 6/11/2020	commitments[2]		% change	Exports[3]
	2020/21	2019/20	current MY	3-yr. avg.
	current MY	last MY	from last MY	2017-19
		- 1,000 mt -		- 1,000 mt -
Mexico	469	792	(41)	3,213
Philippines	1,009	743	36	2,888
Japan	594	563	6	2,655
Nigeria	257	481	(47)	1,433
Korea	437	300	46	1,372
Indonesia	179	218	(18)	1,195
Taiwan	262	245	7	1,175
Thailand	169	198	(15)	727
Italy	153	90	71	622
Colombia	111	156	(28)	618
Top 10 importers	**3,639**	**3,786**	(4)	**15,897**
Total U.S. wheat export sales	**6,333**	**6,336**	(0)	**23,821**
% of projected exports	24%	24%		
change from prior week[2]	**505**	**188**		
Top 10 importers' share of U.S. wheat export sales	57%	60%		67%
USDA forecast, June 2020	**25,886**	**26,294**	(2)	

[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 06/18/20	Previous week*	Current week as % of previous	2020 YTD*	2019 YTD*	2020 YTD as % of 2019 YTD	Last 4-weeks as % of:		2019 total*
							Last year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	345	347	99	7,535	6,631	114	146	118	13,961
Corn	387	278	139	4,811	6,211	77	188	87	7,047
Soybeans	0	0	n/a	2,736	4,749	58	1	1	11,969
Total	**732**	**625**	**117**	**15,082**	**17,591**	**86**	**117**	**84**	**32,977**
Mississippi Gulf									
Wheat	172	71	243	1,819	2,502	73	253	136	4,448
Corn	691	475	145	14,429	12,548	115	174	117	20,763
Soybeans	182	305	60	10,216	11,442	89	72	90	31,398
Total	**1,045**	**851**	**123**	**26,464**	**26,492**	**100**	**130**	**110**	**56,609**
Texas Gulf									
Wheat	53	77	69	1,927	3,472	56	57	72	6,009
Corn	0	0	n/a	374	362	103	135	72	640
Soybeans	0	0	n/a	7	0	n/a	n/a	0	2
Total	**53**	**77**	**69**	**2,308**	**3,834**	**60**	**61**	**69**	**6,650**
Interior									
Wheat	62	51	121	1,114	805	138	144	166	1,987
Corn	195	152	129	3,902	3,569	109	102	91	7,857
Soybeans	78	105	75	3,067	3,150	97	76	80	7,043
Total	**336**	**308**	**109**	**8,083**	**7,524**	**107**	**96**	**93**	**16,887**
Great Lakes									
Wheat	13	48	28	299	432	69	66	101	1,339
Corn	0	0	n/a	0	0	n/a	n/a	0	11
Soybeans	0	44	0	61	169	36	51	48	493
Total	**13**	**91**	**14**	**359**	**601**	**60**	**61**	**58**	**1,844**
Atlantic									
Wheat	0	0	n/a	5	32	17	n/a	n/a	37
Corn	0	0	n/a	8	85	10	0	0	99
Soybeans	7	5	143	400	653	61	43	40	1,353
Total	**7**	**5**	**143**	**414**	**770**	**54**	**41**	**42**	**1,489**
U.S. total from ports*									
Wheat	645	594	109	12,700	13,874	92	119	111	27,781
Corn	1,273	905	141	23,523	22,774	103	160	101	36,417
Soybeans	268	458	58	16,487	20,163	82	54	64	52,258
Total	**2,186**	**1,957**	**112**	**52,710**	**56,811**	**93**	**111**	**94**	**116,457**

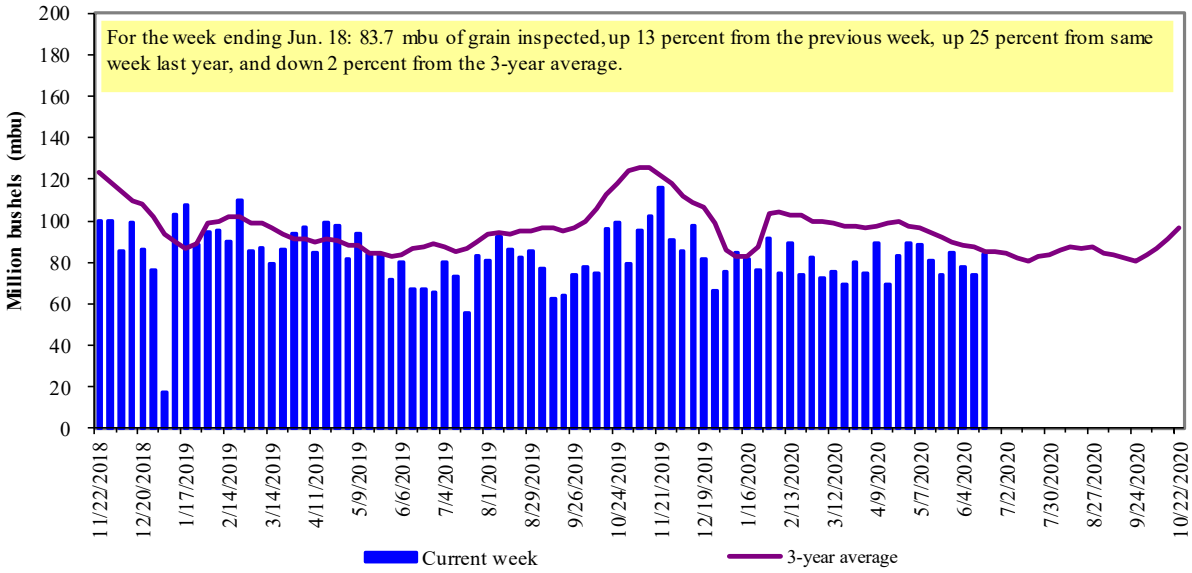
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

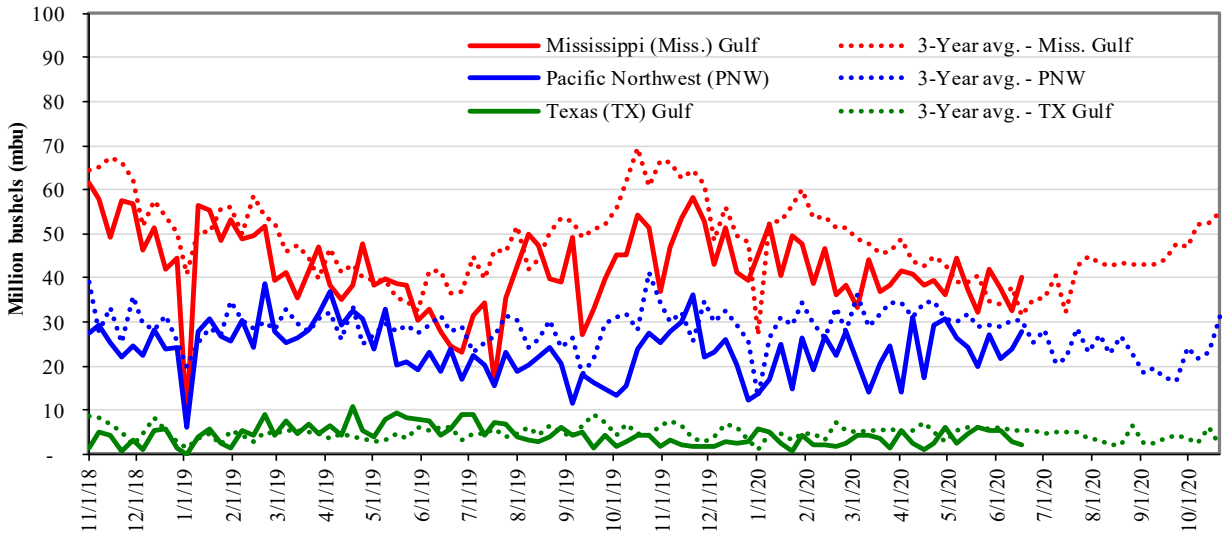


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 06/18/20 inspections (mbu):	
MS Gulf:	40.2
PNW:	27.9
TX Gulf:	1.9

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	up 24	down 31	up 19	up 18
Last Year (same wk):	up 64	down 65	up 40	up 17
3-yr avg. (4-wk. mov. Avg):	up 17	down 65	up 5	down 6

Source: USDA, Federal Grain Inspection Service.

Table 17

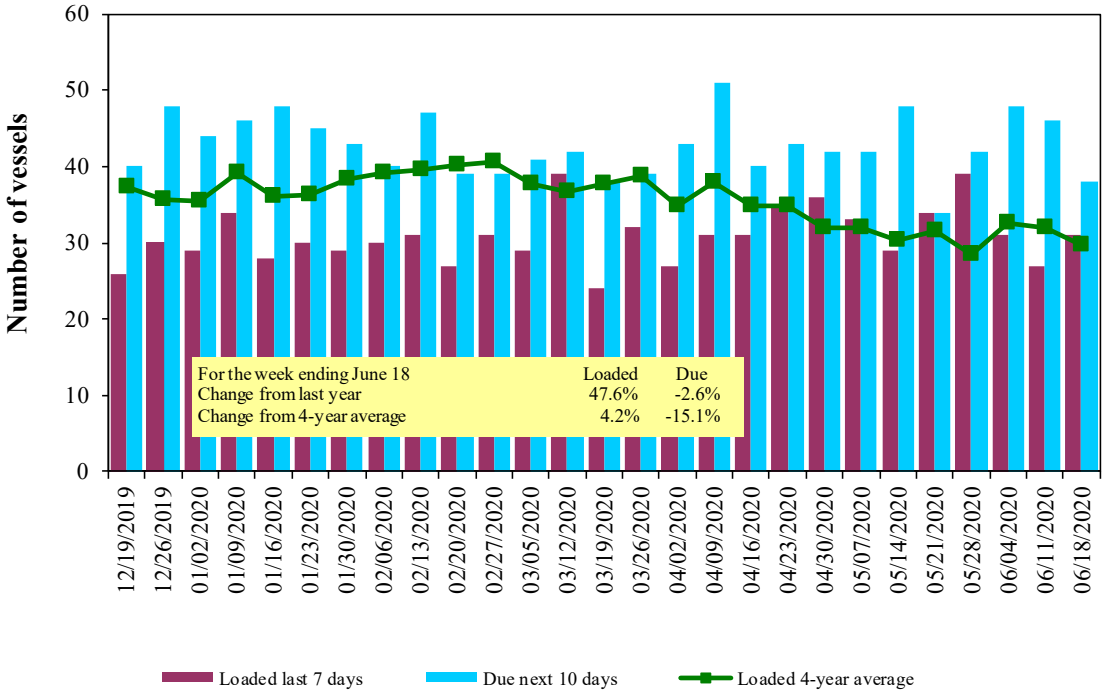
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
6/18/2020	29	31	38	18
6/11/2020	29	27	46	24
2019 range	(26…61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service.

Figure 16

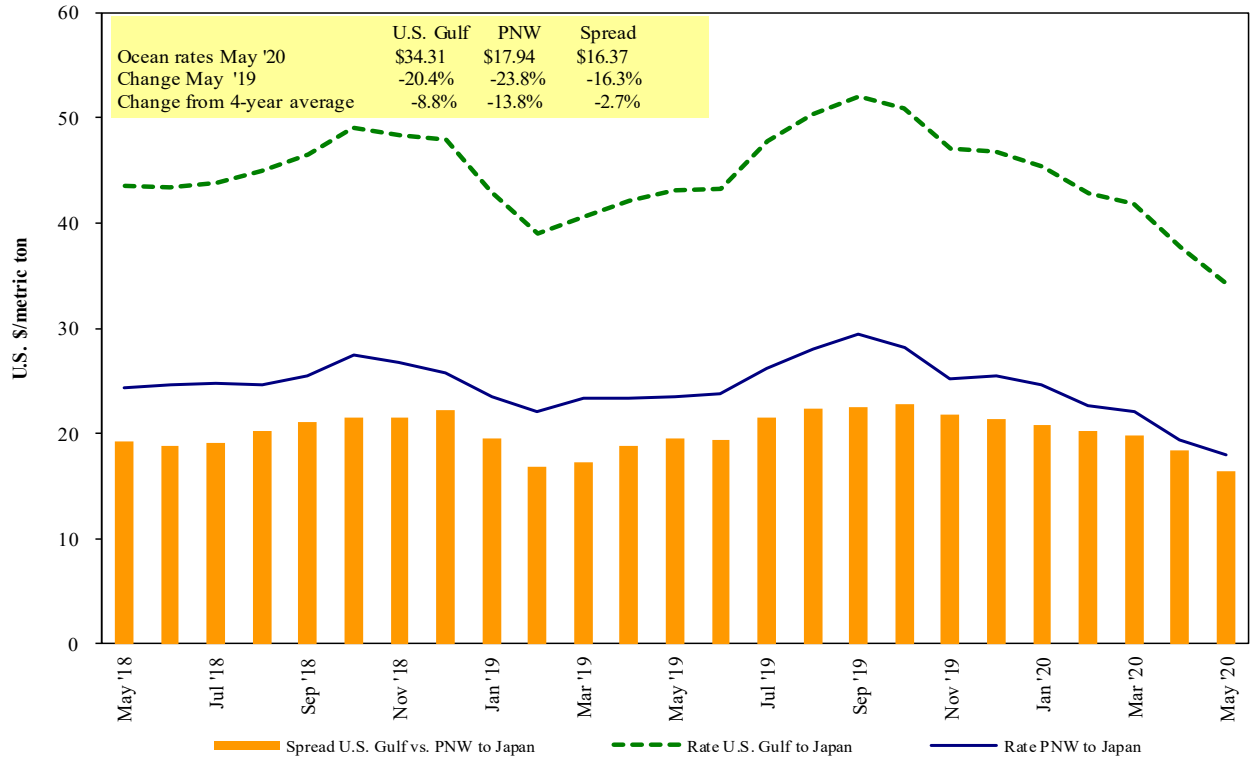
U.S. Gulf[1] vessel loading activity



[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 06/20/2020

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	Pt Sudan	Sorghum	Jun 5/15	33,370	99.50
PNW	Yemen	Wheat	Jun 5/15	40,000	40.89
PNW	Yemen	Wheat	Jun 5/15	30,000	44.89
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
Brazil	China	Heavy grain	Jun 25/30	65,000	23.50
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	Pakistan	Heavy grain	Jun 19/29	70,000	21.85

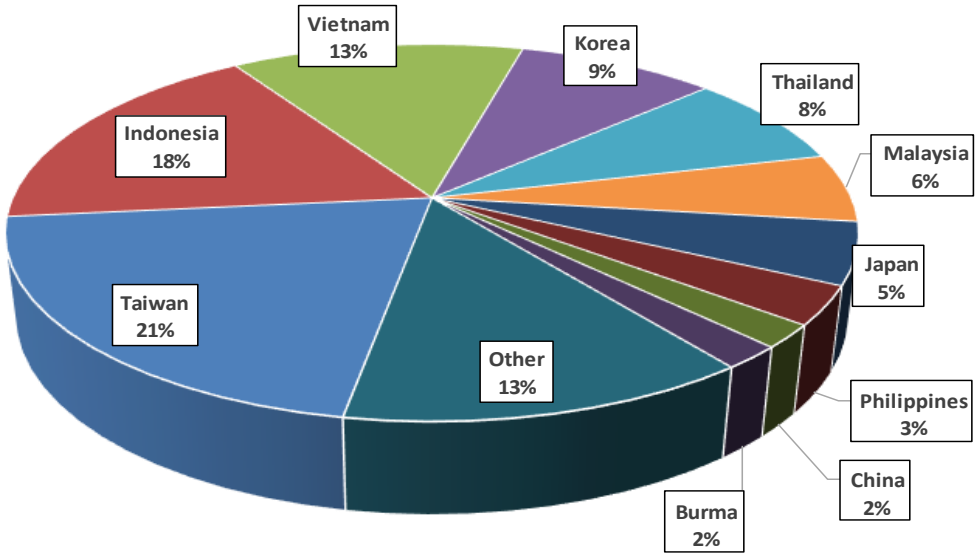
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

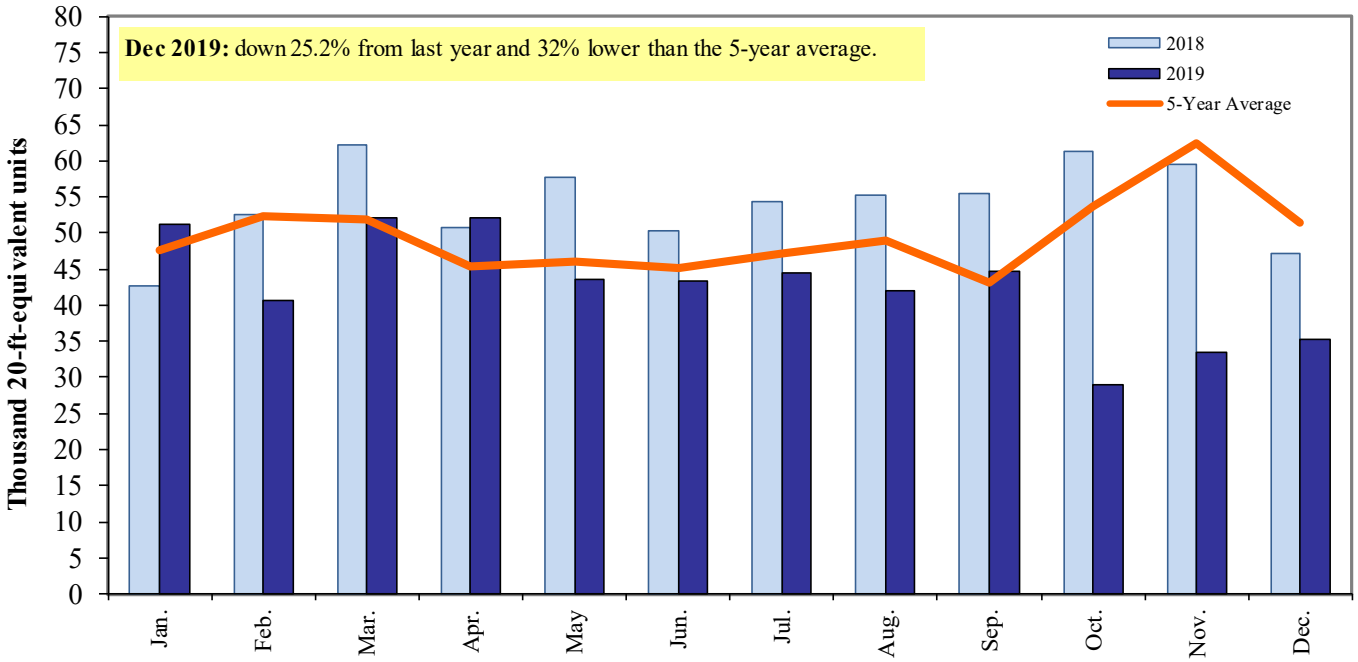
Figure 18
Top 10 destination markets for U.S. containerized grain exports, 2019



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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