Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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WEEKLY HIGHLIGHTS

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DOT Announces Recipients of Almost \$250 Million in Rail Grants

Last week, the U.S. DOT [announced](#) the project recipients of \$248.5 million in grant funds under the Consolidated Rail Infrastructure and Safety Improvements (CRISI) program. Authorized by Congress in 2015, the CRISI program aims to improve the safety, efficiency, and reliability of intercity passenger and freight rail systems. The grants span [32 projects in 27 States](#), with about half of the funds going to rural areas. For example, one project will enable the South Kansas & Oklahoma Railroad (a short line railroad) to handle 286,000-pound cars on about 80 percent of its network. This is the car size used to move a majority of rail-transported grain volumes (see [January 4, 2018 Grain Transportation Report](#)).

Barge Tow Strikes Hale Boggs Bridge in Louisiana

A towboat pushing 29 grain barges struck the Hale Boggs Memorial Bridge, near the towns of Luling and Destrehan, LA, in the New Orleans area, early in the morning of Sunday, March 15. By the afternoon, the Coast Guard reported 26 barges had been recovered, two had sunk, and one had not been accounted for. The Coast Guard closed the lower Mississippi between mile markers 115 and 122 in response. No injuries occurred and no pollution was released in the incident. The river reopened the following afternoon. A grain barge typically carries 1,500-1,750 tons of grain.

Grain Inspections Continue to Fall

For the week ending March 12, [total inspections of grain](#) (corn, wheat, and soybeans) for export from all major U.S. export regions reached 1.89 million metric tons (mmt). Total grain inspections were down 1 percent from the previous week (continuing a 2-week downward trend), down 9 percent from last year, and down 27 percent from the 3-year average. From the previous week, soybean inspections dropped 25 percent—mainly, because of the halt of soybean inspections destined to China—and wheat inspections decreased 2 percent. However, corn inspections increased 18 percent as shipments to Asia rebounded. Also, from the previous week, grain inspections decreased 36 percent in the Pacific Northwest (PNW), but increased 26 percent in the Mississippi Gulf region.

Snapshots by Sector

Export Sales

For the week ending March 5 [unshipped balances](#) of wheat, corn, and soybeans totaled 22 million metric tons (mmt). This represented a 34-percent decrease in outstanding sales, compared to the same time last year. Net [corn export sales](#) reached 1.471 mmt, up 91 percent from the past week. Net [soybean export sales](#) were 0.303 mmt, down 12 percent from the previous week. Net weekly [wheat export sales](#) reached 0.452 mmt, down 17 percent from the previous week.

Rail

U.S. Class I railroads originated 20,863 [grain carloads](#) during the week ending March 7. This was a 1-percent increase from the previous week, 9 percent more than last year, and 5 percent lower than the 3-year average.

Average March shuttle [secondary railcar](#) bids/offers (per car) were \$131 below tariff for the week ending March 12. This was \$169 less than last week and \$1,748 lower than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending March 14, [barge grain movements](#) totaled 560,100. This was a 5-percent increase from the previous week and 15 percent less than the same period last year.

For the week ending March 14, 346 grain barges [moved down river](#)—15 more barges than the previous week. There were 562 grain barges [unloaded in New Orleans](#), 7 percent more than the previous week.

Ocean

For the week ending March 12, 39 [oceangoing grain vessels](#) were loaded in the Gulf—30 percent more than the same period last year. Within the next 10 days (starting March 13), 42 vessels were expected to be loaded—33.3 percent fewer than the same period last year.

As of March 12, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$43.25. This was 1 percent less than the previous week. The rate from PNW to Japan was \$23.25 per mt, 2 percent less than the previous week.

Fuel

For the week ending March 16, the U.S. average [diesel fuel price](#) decreased 8.1 cents from the previous week to \$2.733 per gallon, 33.7 cents below the same week last year.

Feature Article/Calendar

Grain Transportation Update

Most movement and price indicators—across all modes—have been down so far in 2020, compared to 2019 and historical averages. Grain exports are down, contributing to low grain shipments for railroads and barges—the predominant U.S. modes that supply export markets. Low demand has also led to generally low freight rates for rail, barge, and ocean. According to USDA's latest *World Agricultural Supply and Demand Estimates (WASDE)* report, domestic use of corn, soybeans, and wheat is up slightly from last year, which points to steady or higher demand for truck transportation.

Rail Carloads of Grain Down in 2020

In aggregate, rail freight volumes are down so far this year compared to 2019. According to the Association of American Railroads (AAR), total YTD carload traffic (including grain) originated by U.S. Class I railroads is down 6 percent from last year, and intermodal traffic is down 8 percent. Grain has contributed to the low volumes, down 8 percent YTD. However, rail carloads of grain have ticked up in recent weeks, after a weekly low of 18,325 carloads for the week ending February 15. Positive signs for other carload traffic include chemicals (up 3 percent YTD from 2019) and metallic ores (up 10 percent).

Bids for grain shuttle service in the secondary auction markets have been well below average in 2020. Average bids/offers for delivery of railcars in January began trading in November at around -\$100 per car, before falling to about -\$450 by early January. February bids/offers averaged -\$113 per car, down more than \$600 per car from the 3-year average. Trades for delivery of railcars in March have hovered around -\$100 per car for several weeks, down substantially from the prior 3-year average ([GTR fig. 4](#)).¹

Grain rail service has been strong throughout the quarter, in part because of low demand for rail transportation and less network congestion. According to rail service metrics from the Surface Transportation Board, average weekly grain train speeds have fallen since January but at a typical rate for the time of the year. So far, weekly grain train speeds in March have averaged 23.4 miles per hour, 6 percent higher than March 2019. Terminal dwell times have followed a similar pattern, rising since January—likely due to winter weather conditions—but remaining below recent years. Grain origin dwells times are also well below prior years, down 45 percent from the prior 3-year average for March.

Low Demand and Highwater Challenge Early 2020 Barge Shipping

The volume of barged grain in 8 of the first 10 weeks of 2020 exceeded that in the equivalent week of 2019. However, 2019 had historically bad weather that caused severe navigation disruptions, including complete outages of portions of the Mississippi River system. Compared to the 4-year average, 2020 shipment volumes were significantly down. In addition, for all stretches of the river system that USDA data cover, spot barge shipping rates have reached their lowest point since August 2017. After a slight uptick earlier in the year, the rates slowly trended down.

Several notable highwater events drove these trends. The Ohio River and several points on the lower Mississippi River reached severe flood stage. Flooding also caused delays to planned dredging on the Arkansas River. Navigation challenges affect barge supply through cost overruns, lower productivity, and difficulty moving barges up-river. Flooding can also stymie elevator operation, lowering barge demand by blocking river access for some grain.

Figure 1: Barge tonnage and rates

Source: USDA, Agricultural Marketing Service.

¹ One reason rates in the secondary auction market can be below zero is that railroads charge fees for not using the rail car service purchased in the primary auction market. Selling at a discount can be less expensive than incurring fees.

These factors, combined with lower global demand for grain transportation, put downward pressure on prices. Although low transportation costs raise farmers' income, low rates failed to induce shippers to increase their use of carriers' services in early 2020 as they did in 2017. When locations on the mid and upper portions of the Mississippi River regain access, more shippers will participate in the market. However, these markets may not be able to open early since several locks are still closed for maintenance until the end of the month. This continued closure will keep barges from traveling to the mid- and upper-Mississippi even as warmer weather melts the winter ice.

Dry-Bulk Freight Rates Remain Low

Although up from the same period in 2019 (year to year), ocean freight rates for shipping bulk grain in the week ending March 12, 2020, were down from the previous week (week to week) and from January 2, 2020.¹ In the week ending March 12, ocean freight rates for shipping bulk grain fell slightly week to week and from January 2, 2020. As of March 12, 2020, the cost of shipping bulk grain from the U.S. Gulf to Japan was \$43.25 per metric ton (mt), a 1-percent decrease week to week and a 5-percent decrease from January 2, 2020. Also, as of March 12, 2020, the cost of shipping from the Pacific Northwest (PNW) was \$23.25 per mt, a 2-percent decrease week to week and a 7-percent decrease from January 2, 2020. As of March 12, the ocean freight rate for shipping from the U.S. Gulf to Europe was \$13.75 per mt—a 5-percent week-to-week decrease and a 23-percent decrease from January 2, 2020. A combination of events has kept the ocean freight rates low, starting with the Chinese Lunar New Year (from late January to mid-February) and the uncertainty provoked by the coronavirus disease (COVID-19) outbreak, which caused low cargo movements. The slowdown in cargo movements has had the opposite effect of another market factor—the newly enforced International Maritime Organization's regulations on ballast water and low-sulfur emissions (IMO 2020) effective January 2020 (see [July 25, 2019 GTR](#)), which would tend to push rates higher. Because these two opposing factors happened at once, it will take a while for the full effect of either on ocean freight rates to be identified or isolated.

2020 Diesel Fuel Prices Down

Average U.S. on-highway diesel fuel prices are down 33.6 cents per gallon since the beginning of the year (according to the Department of Energy's Energy Information Administration). During the week ending March 16, the average diesel price was \$2.73 per gallon, the lowest since August 2017. During the same week, prices fell more than 8 cents per gallon, the largest weekly drop since 2015. Demand for fuel has been slow following the COVID-19 outbreak. As a result, crude oil prices have fallen more than \$22 per barrel since the beginning of the year.

Outlook for 2019/20

According to the March [WASDE](#), total exports of the three major grains are expected to reach 4.6 billion bushels in 2019/20, down 4.2 percent from 2018/19 (see table). Currently, export sales commitments of corn are 31 percent below the same time last year because of slow demand and low prices. On the other hand, total soybean export commitments are 16 percent below last year, and YTD wheat commitments for the new 2019/20 marketing year are up 3 percent from 2018/19 ([GTR, Tables 13-15](#)). Demand for U.S. wheat has remained strong, owing to large U.S. stocks and tight supplies among major competitors. In 2019/20, U.S. corn exports are projected to decrease 16 percent from 2018/19, as a result of increasing competition from Ukraine and South America. Soybean and wheat exports are expected to increase 4 percent and 7 percent, respectively (see table).

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Table 1. Major grains: production and use, March 2020 WASDE, million bushels					
	Corn	Soybeans	Wheat	Total	Y/Y
United States 2019/20 (projected)					
Production	13,692	3,558	1,920	19,170	-7.2%
Exports	1,725	1,825	1,000	4,550	-4.2%
Domestic use	12,345	2,233	1,165	15,743	1.2%
Ending stocks	1,892	425	940		
Total use	14,070	4,058	2,165		
Stocks/use	13.4%	10.5%	43.4%		
United States 2018/19 (estimated)					
Production	14,340	4,428	1,885	20,653	-0.5%
Exports	2,065	1,748	936	4,749	-13.3%
Domestic use	12,223	2,223	1,103	15,549	-0.3%
Ending stocks	2,221	909	1,080		
Total use	14,288	3,971	2,039		
Stocks/use	15.5%	22.9%	53.0%		
2017/18					
Production	14,609	4,412	1,741	20,762	
Exports	2,438	2,134	906	5,478	
Domestic use	12,361	2,163	1,075	15,599	
Ending stocks	2,140	438	1,099		
Total use	14,798	4,297	1,981		
Stocks/use	14.5%	10.2%	55.5%		

Source: USDA, World Agricultural Supply and Demand Estimates, March 2020.

¹ The first 2020 ocean freight rate data became available on January 2, 2020.

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

	Truck	Rail	Barge	Ocean
For the week ending	Unit train	Shuttle	Gulf	Pacific
03/18/20	183	n/a	220	154
03/11/20	189	n/a	227	153

¹Indicator: 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	3/13/2020	3/6/2020
Corn	IL-Gulf	-0.57	-0.58
Corn	NE-Gulf	-0.73	-0.74
Soybean	IA-Gulf	-1.07	-1.08
HRW	KS-Gulf	-2.04	-2.04
HRS	ND-Portland	-2.26	-2.13

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		Pacific	Atlantic &	Total	Week ending	Cross-border
	Gulf	Texas Gulf	Northwest	East Gulf			Mexico ³
3/11/2020 ^p	133	958	3,767	309	5,167	3/7/2020	2,542
3/04/2020 ^r	106	567	4,676	273	5,622	2/29/2020	2,199
2020 YTD ^r	4,098	6,884	45,462	2,213	58,657	2020 YTD	23,142
2019 YTD ^r	7,091	11,620	57,663	4,282	80,656	2019 YTD	23,276
2020 YTD as % of 2019 YTD	58	59	79	52	73	% change YTD	99
Last 4 weeks as % of 2019 ²	22	55	81	77	70	Last 4wks. % 2019	133
Last 4 weeks as % of 4-year avg. ²	32	40	70	54	61	Last 4wks. % 4 yr.	131
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

¹Data is incomplete as it is voluntarily provided.

² Compared with same 4-weeks in 2019 and prior 4-year average.

³ Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads. to reflect switching between Kansas City Southern de Mexico (KCSM) and Grupo Mexico.

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

Source: USDA, Agricultural Marketing Service.

Railroads originate approximately 24 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail deliveries to port

Source: USDA, Agricultural Marketing Service.

Table 4

Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 3/7/2020	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,730	2,397	10,561	1,302	4,873	20,863	3,105	3,967
This week last year	1,921	2,288	8,553	1,440	4,929	19,131	3,608	3,161
2020 YTD	17,269	22,316	103,388	10,930	43,964	197,867	32,494	36,396
2019 YTD	19,246	26,224	106,798	11,133	50,892	214,293	38,960	38,791
2020 YTD as % of 2019 YTD	90	85	97	98	86	92	83	94
Last 4 weeks as % of 2019*	85	83	106	88	87	96	72	102
Last 4 weeks as % of 3-yr. avg.**	89	84	98	104	79	91	77	94
Total 2019	91,611	137,190	568,369	58,527	260,269	1,115,966	212,581	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 offerings¹ (\$/car)²

For the week ending: 3/12/2020		Delivery period							
		Mar-20	Mar-19	Apr-20	Apr-19	May-20	May-19	Jun-20	Jun-19
BNSF ³	COT grain units	no offer	n/a	0	n/a	no bid	n/a	0	n/a
	COT grain single-car	no offer	n/a	0	n/a	0	n/a	0	n/a
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 offer	no offer	no bid	no offer	no bid	10	n/a	n/a

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

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

³BNSF - COT = BNSF Railway Certificate of Transportation; north grain and south grain bids were combined effective the week ending 6/24/06.

⁴UP - 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 March 2020, secondary market

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 April 2020, secondary market

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 May 2020, secondary market

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:		Delivery period					
3/12/2020		Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-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
Shuttle	BNSF-GF	(188)	(125)	n/a	n/a	n/a	n/a
	Change from last week	(263)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2019	(2521)	(1117)	n/a	n/a	n/a	n/a
	UP-Pool	(75)	(104)	(100)	n/a	n/a	n/a
	Change from last week	(75)	46	n/a	n/a	n/a	n/a

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

Note: Bids listed are market indicators only and are not guaranteed prices. n/a = not available; GF = guaranteed freight; Pool = guaranteed pool;

BNSF = BNSF Railway; UP = Union Pacific Railroad.

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

Source: USDA, Agricultural Marketing Service.

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

Table 7

Tariff rail rates for unit and shuttle train shipments¹

March 2020	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ⁴
					metric ton	bushel ²	
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,983	\$86	\$40.41	\$1.10	0
	Grand Forks, ND	Duluth-Superior, MN	\$4,333	\$0	\$43.03	\$1.17	2
	Wichita, KS	Los Angeles, CA	\$7,240	\$0	\$71.90	\$1.96	1
	Wichita, KS	New Orleans, LA	\$4,525	\$151	\$46.44	\$1.26	-1
	Sioux Falls, SD	Galveston-Houston, TX	\$6,976	\$0	\$69.28	\$1.89	1
	Colby, KS	Galveston-Houston, TX	\$4,801	\$166	\$49.32	\$1.34	0
Corn	Amarillo, TX	Los Angeles, CA	\$5,121	\$231	\$53.14	\$1.45	0
	Champaign-Urbana, IL	New Orleans, LA	\$3,900	\$171	\$40.43	\$1.03	-3
	Toledo, OH	Raleigh, NC	\$6,816	\$0	\$67.69	\$1.72	4
	Des Moines, IA	Davenport, IA	\$2,415	\$36	\$24.34	\$0.62	7
	Indianapolis, IN	Atlanta, GA	\$5,818	\$0	\$57.78	\$1.47	3
	Indianapolis, IN	Knoxville, TN	\$4,874	\$0	\$48.40	\$1.23	4
Soybeans	Des Moines, IA	Little Rock, AR	\$3,800	\$106	\$38.79	\$0.99	-2
	Des Moines, IA	Los Angeles, CA	\$5,680	\$310	\$59.48	\$1.51	-1
	Minneapolis, MN	New Orleans, LA	\$3,631	\$186	\$37.91	\$1.03	-11
	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
Shuttle train							
Wheat	Champaign-Urbana, IL	New Orleans, LA	\$4,645	\$171	\$47.83	\$1.30	-2
	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
Corn	Colby, KS	Portland, OR	\$6,012	\$272	\$62.40	\$1.70	1
	Minneapolis, MN	Portland, OR	\$5,180	\$0	\$51.44	\$1.31	0
	Sioux Falls, SD	Tacoma, WA	\$5,140	\$0	\$51.04	\$1.30	0
	Champaign-Urbana, IL	New Orleans, LA	\$3,820	\$171	\$39.63	\$1.01	0
	Lincoln, NE	Galveston-Houston, TX	\$3,880	\$0	\$38.53	\$0.98	0
	Des Moines, IA	Amarillo, TX	\$4,220	\$134	\$43.24	\$1.10	4
Soybeans	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
	Sioux Falls, SD	Tacoma, WA	\$5,850	\$0	\$58.09	\$1.58	2
	Minneapolis, MN	Portland, OR	\$5,900	\$0	\$58.59	\$1.59	2
	Fargo, ND	Tacoma, WA	\$5,750	\$0	\$57.10	\$1.55	2
	Council Bluffs, IA	New Orleans, LA	\$4,875	\$197	\$50.37	\$1.37	2
	Toledo, OH	Huntsville, AL	\$4,805	\$0	\$47.72	\$1.30	4
	Grand Island, NE	Portland, OR	\$5,860	\$278	\$60.96	\$1.66	2

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: March 2020			Tariff rate per car ¹	Fuel surcharge per car ²	Tariff rate plus fuel surcharge per:		Percent change ⁴ Y/Y
Commodity	Origin state	Destination region			metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,509	\$0	\$76.72	\$2.09	3
	OK	Cuautitlan, EM	\$6,775	\$118	\$70.44	\$1.92	0
	KS	Guadalajara, JA	\$7,534	\$576	\$82.86	\$2.25	4
	TX	Salinas Victoria, NL	\$4,329	\$75	\$44.99	\$1.22	0
Corn	IA	Guadalajara, JA	\$8,902	\$488	\$95.94	\$2.43	5
	SD	Celaya, GJ	\$8,140	\$0	\$83.17	\$2.11	3
	NE	Queretaro, QA	\$8,278	\$265	\$87.30	\$2.22	1
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlalnepantla, EM	\$7,643	\$259	\$80.74	\$2.05	1
	SD	Torreon, CU	\$7,690	\$0	\$78.57	\$1.99	3
Soybeans	MO	Bojay (Tula), HG	\$8,547	\$456	\$91.99	\$2.50	4
	NE	Guadalajara, JA	\$9,172	\$476	\$98.57	\$2.68	5
	IA	El Castillo, JA	\$9,490	\$0	\$96.97	\$2.64	4
	KS	Torreon, CU	\$7,964	\$327	\$84.71	\$2.30	4
Sorghum	NE	Celaya, GJ	\$7,772	\$430	\$83.81	\$2.13	4
	KS	Queretaro, QA	\$8,108	\$148	\$84.35	\$2.14	1
	NE	Salinas Victoria, NL	\$6,713	\$119	\$69.80	\$1.77	1
	NE	Torreon, CU	\$7,157	\$302	\$76.22	\$1.93	3

¹Rates 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.

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

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

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

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

Figure 7

Railroad fuel surcharges, North American weighted average¹

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}

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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
Rate¹	3/17/2020	-	-	278	183	192	192	177
	3/10/2020	-	-	275	184	199	199	178
\$/ton	3/17/2020	-	-	12.90	7.30	9.00	7.76	5.56
	3/10/2020	-	-	12.76	7.34	9.33	8.04	5.59
Current week % change from the same week:								
	Last year	-	-	-41	-51	-57	-57	-51
	3-year avg. ²	-	-	-36	-45	-52	-52	-40
Rate¹	April	358	308	280	192	203	203	178
	June	358	308	298	195	203	203	183

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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:

$$(\text{Rate} \times 1976 \text{ tariff benchmark rate per ton}) / 100$$

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 River¹ (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 03/14/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	0	0	0	0	0
Alton, IL (L26)	229	16	102	0	346
Granite City, IL (L27)	222	14	98	0	334
Illinois River (La Grange)	170	14	80	0	264
Ohio River (Olmsted)	146	7	30	0	183
Arkansas River (L1)	0	32	11	0	43
Weekly total - 2020	368	53	139	0	560
Weekly total - 2019	341	65	254	0	660
2020 YTD ¹	2,693	352	2,486	12	5,542
2019 YTD ¹	2,152	459	2,129	27	4,767
2020 as % of 2019 YTD	125	77	117	42	116
Last 4 weeks as % of 2019 ²	134	91	102	32	115
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 3/16/2020 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.789	-0.071	-0.335
	New England	2.918	-0.072	-0.282
	Central Atlantic	2.989	-0.056	-0.324
	Lower Atlantic	2.627	-0.082	-0.354
II	Midwest	2.591	-0.098	-0.401
III	Gulf Coast	2.504	-0.073	-0.365
IV	Rocky Mountain	2.742	-0.061	-0.202
V	West Coast	3.322	-0.077	-0.175
	West Coast less California	2.954	-0.072	-0.185
	California	3.625	-0.080	-0.156
Total	United States	2.733	-0.081	-0.337

¹Diesel 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

For the week ending March 16, the U.S. average diesel fuel price decreased 8.1 cents from the previous week to \$2.733 per gallon, 33.7 cents below the same week last year.

■ Last year \$3.070
■ Current year \$2.733

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)

For the week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export balances ¹									
3/5/2020	1,779	337	1,607	1,046	148	4,917	12,881	4,168	21,966
This week year ago	2,425	881	1,374	1,037	110	5,828	13,843	13,805	33,475
Cumulative exports-marketing year ²									
2019/20 YTD	6,994	1,964	5,370	3,707	680	18,714	15,232	30,201	64,147
2018/19 YTD	5,538	2,121	5,000	3,998	360	17,017	27,055	27,302	71,374
YTD 2019/20 as % of 2018/19	126	93	107	93	189	110	56	111	90
Last 4 wks. as % of same period 2018/19*	75	40	113	106	135	85	90	33	66
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 importers¹ of U.S. corn

For the week ending 3/05/2020	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2016-18
	2019/20	2018/19		
	current MY	last MY*		
- 1,000 mt -				
Mexico	10,875	13,329	(18)	14,659
Japan	5,891	8,514	(31)	11,955
Korea	871	3,208	(73)	4,977
Colombia	2,656	3,241	(18)	4,692
Peru	15	1,877	(99)	2,808
Top 5 importers	20,307	30,169	(33)	39,091
Total U.S. corn export sales	28,113	40,898	(31)	54,024
% of projected exports	64%	78%		
Change from prior week ²	1,471	372		
Top 5 importers' share of U.S. corn export sales	72%	74%		72%
USDA forecast March 2020	43,893	52,545	(16)	
Corn use for ethanol USDA forecast, March 2020	137,795	136,601	1	

¹ Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2018/19; marketing year (MY) = Sep 1 - Aug 31.

² Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. Total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales.

³ FAS marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average.

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

Source: USDA, Foreign Agricultural Service.

Table 14

Top 5 importers¹ of U.S. soybeans

For the week ending 3/05/2020	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2016-18
	2019/20 current MY	2018/19 last MY*		
	- 1,000 mt -			- 1,000 mt -
China	12,138	11,076	10	25,733
Mexico	3,506	4,599	(24)	4,271
Indonesia	1,309	1,560	(16)	2,386
Japan	1,868	1,869	(0)	2,243
Egypt	2,080	2,037	2	1,983
Top 5 importers	20,901	21,140	(1)	36,616
Total U.S. soybean export sales	34,368	41,106	(16)	53,746
% of projected exports	69%	86%		
change from prior week ²	303	1,912		
Top 5 importers' share of U.S. soybean export sales	61%	51%		68%
USDA forecast, March 2020	49,728	47,629	104	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2018/19; marketing year (MY) = Sep 1 - Aug 31.

²Cumulative 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.

³FAS 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 importers¹ of all U.S. wheat

For the week ending 3/5/2020	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2016-18
	2019/20 current MY	2018/19 last MY*		
	- 1,000 mt -			- 1,000 mt -
Philippines	3,092	2,890	7	3,047
Mexico	3,311	2,723	22	3,034
Japan	2,473	2,542	(3)	2,695
Nigeria	1,358	1,417	(4)	1,564
Indonesia	971	1,132	(14)	1,381
Korea	1,420	1,478	(4)	1,355
Taiwan	1,164	1,067	9	1,164
Egypt	101	692	(85)	821
Thailand	853	742	15	747
Iraq	262	416	(37)	574
Top 10 importers	15,004	15,099	(1)	16,382
Total U.S. wheat export sales	23,632	22,845	3	24,388
% of projected exports	87%	90%		
change from prior week ²	452	263		
Top 10 importers' share of U.S. wheat export sales	63%	66%		67%
USDA forecast, March 2020	27,248	25,504	7	

¹Based on USDA, Foreign Agricultural Service(FAS) marketing year ranking reports for 2018/19; Marketing year (MY) = Jun 1 - May 31.

²Cumulative 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.

³FAS 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 03/12/20	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	227	292	78	3,313	2,723	122	111	128	13,961
Corn	120	122	98	844	2,174	39	85	48	7,047
Soybeans	11	147	8	1,980	2,833	70	28	36	11,969
Total	358	562	64	6,137	7,730	79	72	70	32,977
Mississippi Gulf									
Wheat	129	55	236	839	1,080	78	78	77	4,448
Corn	651	518	126	5,234	5,252	100	121	81	20,763
Soybeans	312	291	107	6,349	6,571	97	61	64	31,398
Total	1,092	864	126	12,421	12,903	96	88	74	56,609
Texas Gulf									
Wheat	112	80	141	795	1,202	66	44	50	6,009
Corn	0	31	0	129	116	112	105	112	640
Soybeans	0	0	n/a	6	0	n/a	n/a	n/a	2
Total	112	111	101	931	1,318	71	48	55	6,650
Interior									
Wheat	5	56	9	470	333	141	146	148	1,987
Corn	190	144	132	1,530	1,394	110	118	121	7,857
Soybeans	116	148	79	1,679	1,339	125	131	140	7,043
Total	312	348	90	3,680	3,067	120	127	132	16,887
Great Lakes									
Wheat	0	0	n/a	1	30	3	0	0	1,339
Corn	0	0	n/a	0	0	n/a	n/a	n/a	11
Soybeans	0	0	n/a	0	16	0	n/a	n/a	493
Total	0	0	n/a	1	47	2	0	0	1,844
Atlantic									
Wheat	0	0	n/a	0	1	n/a	0	0	37
Corn	0	0	n/a	0	35	0	0	0	99
Soybeans	19	23	80	258	328	79	71	65	1,353
Total	19	23	80	258	363	71	63	59	1,489
U.S. total from ports*									
Wheat	473	483	98	5,418	5,369	101	89	98	27,781
Corn	961	815	118	7,737	8,971	86	112	77	36,417
Soybeans	459	609	75	10,272	11,087	93	59	66	52,258
Total	1,893	1,908	99	23,427	25,427	92	84	78	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 PNW¹ (wheat, corn, and soybeans) **Week ending 03/12/20 inspections (mbu):**

MS Gulf: 41.8
 PNW: 13.5
 TX Gulf: 4.1

Percent change from:

	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	up 26	unchanged	up 23	down 36
Last Year (same wk):	up 18	down 8	up 15	down 49
3-yr avg. (4-wk. mov. Avg):	down 16	down 27	down 17	down 57

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

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

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
3/12/2020	34	39	42	11
3/5/2020	34	29	41	10
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. Gulf¹ vessel loading activity

¹U.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 03/14/2020

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Bangladesh	Wheat	Dec 10/20	48,990	79.92*
U.S. Gulf	China	Heavy grain	Jan 25/30	65,000	46.50
U.S. Gulf	China	Heavy grain	Dec 15/20	65,000	49.75
U.S. Gulf	China	Heavy grain	Nov 15/18	66,000	49.00
U.S. Gulf	Rotterdam	Heavy grain	Feb 5/11	55,000	19.50
PNW	Taiwan	Wheat	Apr 27/May 11	50,700	29.40
PNW	China	Heavy grain	Jan 22/26	63,000	23.00
PNW	Bangladesh	Wheat	Dec 10/20	23,080	74.44*
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
Brazil	Japan	Corn	Dec 22/31	49,000	37.25 op 37.15

* 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, Jan-Sep 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, 120100, 120810, 230210, 230310, 230330, and 230990.

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

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