USDA United States Department of Agriculture

Grain Transportation Report

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

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July 2, 2020

Contents

The next release is July 9, 2020

WEEKLY HIGHLIGHTS

FMCSA Temporarily Waives Requirements for Pre-Employment Testing for Controlled Substances

On June 5, 2020, the Federal Motor Carrier Safety Administration (FMCSA) granted a 3-month waiver for certain pre-employment testing conditions for drivers recently furloughed because of the COVID-19 pandemic. Per current regulations, drivers must undergo pre-employment testing for controlled substances and have a verified negative test result before performing safety-sensitive functions. Ordinarily, there is an exception to this pre-employment testing. The exception applies for drivers who have been in a random controlled substances testing program within the previous 30 days and were either (1) tested for controlled substances within the past 6 months or (2) enrolled in the program for the previous 12 months. The waiver extends the exception period from 30 days to 90 days. FMCSA reserves the right to revoke the waiver in instances where a driver is involved in an accident or an employer fails to comply with the terms.

FMC Provides Guidance To Address Supply-Chain Challenges at San Pedro Bay

The Federal Maritime Commission (FMC) has issued a four-part guidance to address supply-chain challenges at the ports of San Pedro Bay, CA. One part of the guidance recommends that truckers "should be directed to return empty containers to the terminal where they were picked up, allowing [truckers] to make dual moves and reduce the number of chassis required." FMC also suggested terminals allow appointment-free returns during slow periods, such as nighttime, while noting that some terminals are already following these practices. Other recommendations are notices of blank sailings, timelines for receiving export cargo, and creation of an advisory board among carriers, ports, and marine terminal operators. The recommendations are the result of Fact Finding 29 discussions, in which the FMC is using a regional approach to alleviate freight challenges that have arisen because of the COVID-19 pandemic.

ATRI Releases Report on the Effect of Large Verdict Awards on the Trucking Industry

The American Transportation Research Institute (ATRI) released a comprehensive study tracking large verdict awards against the trucking industry and the awards' effects on safety and insurance. Titled *Understanding the Impact of Nuclear Verdicts on the Trucking Industry*, the report took its data partly from ATRI's new trucking litigation database containing detailed information on 600 cases from 2006 to 2019. The researchers found large verdicts against trucking fleets increased substantially over this period, both in number and in size of awards. In the first 5 years of data, there were 26 cases over $1 million, versus 300 cases of that size in last 5 years of data. The research also shows, from 2010 to 2018, verdict awards grew 51.7 percent annually as standard inflation grew 1.7 percent and healthcare costs grew 2.9 percent. The researchers conducted a qualitative analysis based on surveys and interviews with defense and plaintiff attorneys, as well as insurance and motor carrier experts. The study provides recommendations for modifying pre-trial preparations, litigation strategies, and mediation approaches.

Snapshots by Sector

Export Sales

For the week ending June 18, **unshipped balances** of wheat, corn, and soybeans totaled 22.9 million metric tons (mmt). This represented a 2-percent decrease in outstanding sales from the same time last year. Net **corn export sales** were 0.462 mmt, up 29 percent from the past week. Net **soybean export sales** were 0.602 mmt, up 12 percent from the previous week. Net **wheat export sales** were 0.519 mmt, up 3 percent from the previous week.

Rail

U.S. Class I railroads originated 21,437 **grain carloads** during the week ending June 20. This was unchanged from the previous week, 6 percent less than last year, and 6 percent lower than the 3-year average.

Average July shuttle **secondary railcar** bids/offers (per car) were $29 above tariff for the week ending June 25. This was $91 more than last week and $124 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending June 27, **barge grain movements** totaled 868,840 tons. This was 20 percent less than the previous week and 17 percent more than the same period last year.

For the week ending June 27, 567 grain barges **moved down river**—134 fewer barges than the previous week. There were 629 grain barges **unloaded in New Orleans**, 3 percent less than the previous week.

Ocean

For the week ending June 25, 30 **oceangoing grain vessels** were loaded in the U.S. Gulf—43 percent more than the same period last year. Within the next 10 days (starting June 26), 40 vessels were expected to be loaded—11 percent fewer than the same period last year.

As of June 25, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $39.25. This was 4 percent more than the previous week. The rate from the Pacific Northwest to Japan was $20.50 per mt, 3 percent more than the previous week.

Fuel

For the week ending June 29, the U.S. average **diesel fuel price** increased 0.5 cents from the previous week to $2.43 per gallon, 61.2 cents below the same week last year.

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Feature Article/Calendar

Summer Rehab of Illinois River Facilities Triggers Changes in Shipping Patterns, Freight Rates

As a major artery for barged grain transportation, the Illinois River is economically key to U.S. agriculture. In 2019, over 6.5 million metric tons (mmt) of downbound grain (22 percent of all barged grain through the Mississippi locking system) passed through the LaGrange Lock and Dam—the final lock and dam facility on the Illinois River. Given these volumes, outages on the Illinois can cause substantial shifts in shipping routes, modes, and prices. However, these outages can be planned, orderly, and minimally cost-intensive, or they can be unplanned, disruptive, and costly—as will be made clear.

In a planned measure this summer, the U.S. Army Corps of Engineers (USACE) is closing several lock and dam facilities on the Illinois to perform repairs and rehabilitation (see table 1 for dates). Work on the mechanical and electrical systems and concrete should extend the lifespan of the facilities. According to USACE, tows will be able to traverse the La Grange and Peoria facilities at the dam portion when water levels are high enough to allow passage. However, other facilities will not be navigable during the closures.

The closures are likely to increase transportation costs for some grain shippers. Since June 25, the *Grain Transportation Report*'s (*GTR*) **figure 8** has been modified to capture the changes in activity of the barged grain markets during the Illinois River closures. This article briefly analyzes the potential economic impacts of the closures and describes the modifications to *GTR* figure 8.

Table 1. List of Illinois River outages.

Lock and dam facility	Location	River mile	Closure date	Reopening date
LaGrange	Versailles, IL	80	July 1	September 30
Peoria	Peoria, IL	158	July 6	September 30
Starved Rock	Utica, IL	231	July 1	October 29
Marseilles	Marseilles, IL	245	July 6	October 29
Dresden Island*	Morris, IL	271	July 6	October 3
Dresden Island**	Morris, IL	271	October 4	October 24
Dresden Island*	Morris, IL	271	October 25	October 28
* partial closure, ** full closure				

Source: U.S. Army Corps of Engineers.

Possible Impacts on Shipping Routes and Prices

Fortunately, shippers who cannot access their standard Illinois River route this summer will have alternatives. Besides trucking grain longer distances to barge facilities or shipping by rail, shippers may continue storing grain until the river reopens. Each of these options will increase costs, though the timing of the closures will likely minimize the cost increases associated with trucking longer distances. Compared to other times of year, the third quarter (when the river will be closed) tends to have the lowest trucking rates for the north-central United States, especially on long-haul routes (table 2).

Table 2. North-central regional grain truck rates by quarter, price per mile average, 2015-2019.

	25 miles	100 miles	200 miles
Q1	$4.09	$2.69	$2.51
Q2	$4.08	$2.83	$2.48
Q3 (period of closures)	$4.12	$2.59	$2.35
Q4	$4.34	$2.84	$2.70

Source: USDA, Agricultural Marketing Service.

For shippers who normally use the closed portions of the river, some barge options remain. Eighty miles of open river below LaGrange Lock and Dam will still be accessible. However, many shippers in Illinois will be closer to the Mississippi River than the open portions of the Illinois River. For periods when both locations are available for shipping, freight rates for grain shipments originating from the Mid-Mississippi River are, on average, 19 percent higher in cash price than shipments originating on the Illinois River. Logistics-based cost increases to carriers due to increased congestion in the Mid-Mississippi could push freight prices above normal.

Nonetheless, signs of downward pressure on prices in the upcoming months have appeared: redeployment of towboats and barges from the Illinois River to the Mid-Mississippi may create surplus capacity. Mid-Mississippi rates have decreased recently as barges leave the Illinois, anticipating the closure. The rate decrease suggests the surplus of towboats and barges on the Mid-Mississippi may be the prevailing factor in determining prices—curbing potential rate increases. Companies that must

get grain on the Illinois, such as ethanol refineries, can charter small barge fleets to remain on the river to ensure a steady supply of grain.

Unlike barge and truck rates, which track more closely with harvest progress, rail freight carriage will likely be more costly during the weeks of the planned river closure. Bids/offers in the secondary shuttle market for delivery of railcars in July and August are typically lower than other months, but rise considerably in October. Bids for July and August are currently trading a little below average, down about $40 for July and $70 for August (**GTR figs. 5 and 6**). Shippers may have already purchased freight carriage for the closure, having hedged their risk, rather than purchasing freight carriage on the spot market during a high-rate period, in response to an outage.

Storage is another possible alternative to shipping during the period of the closure. However, Illinois had a 70,000-bushel deficit of storage for grain in 2019, when benchmarked against total grain storage capacity and total fall grain supplies (October 10, 2019 *GTR*). This deficit was smaller than normal for recent years: the average deficit in Illinois in the previous 5 years had been over 200,000 bushels. Because poor weather and other factors delayed harvesting in 2019, additional storage pressure may result if harvest begins early in 2020 and coincides with the later weeks of the Illinois River closure. As indicated (in the week ending June 13, 2020) by the second-highest weekly total volume of grain traffic through LaGrange since 2013, elevators have made an apparent push to decrease grain inventories.

Recent Research Quantifies Impacts From Unintended Closures

Despite routine maintenance by USACE, the targeted Illinois River locks are still at risk of overall failure. When they were built in the 1930s, the locks had an intended lifespan of 50 years. A 2019 study found that the effects of an unplanned year-long outage of LaGrange Lock and Dam (among other facilities) could substantially increase trucking costs for barge shippers. The estimated increases ranged from $23 million, in an average year, to $265 million, in a high-traffic year. Another study estimated lost economic activity caused by an outage at the LaGrange Lock and Dam. Estimates ranged from hundreds of millions of dollars, for an unanticipated fall closure, to over $1 billion dollars, for a year-long closure in the event of an unexpected failure. However, planning an outage for low-traffic periods can minimize the cost increases, while upgrading with new facilities would significantly reduce the risk of unplanned or extended outages. Because the planned closures have been well communicated by the Corps and, in turn, not a surprise to market participants, the cost increases will likely be significantly lower than recent estimates for unplanned outages.

Change to *GTR*'s Figure 8

The Chicago Mercantile Exchange (CME) responded to the planned closure by altering their rules for grain contracts. The CME governs trade with a series of delivery mechanisms in the contracts for grain, including location for delivery of the commodities. Delivery rules are outlined in the CME rulebook, and CME has provided a guide on how to accommodate the closure. Typically, futures contracts are based on delivery to elevators on the Illinois River. Because the closures impede grain shipments from the Illinois River to export locations, the rules on contracts now specify delivery from the Mississippi River. Still, the contract language allows for delivery from the Illinois if shipper and taker can come to a mutual agreement. Because of the contract rules, the rate for the Mid-Mississippi span of river, serving Iowa and Illinois, is more useful for those participating in the futures market. To accommodate this development, the GTR will run a modified version of **figure 8** that highlights the Mid-Mississippi rate instead of the Illinois River rate until the Illinois reopens. For continuity, the Illinois River rates (when available) will still be made public in the online datasets.

Conclusion: Shippers Will Adapt To Minimize Cost Disruptions

Overall, during the planned closure of the LaGrange Lock and Dam, grain transportation costs are likely to increase somewhat for affected shipments. Although premiums for guaranteed rail service for July and August shipments are low, particularly when purchased in advance, rail is more costly than barge. In the presence of seasonally low truck rates and adequate barge supply, shippers will likely continue to prefer barge transportation and to seek alternative points of origin to minimize cost increases. The benefit of scheduling the river closure is it allows stakeholders to explore alternatives that would be unavailable in an unplanned closure. During a period of peak barge demand—i.e., the months coinciding with maximum harvest activity in the upper Midwest—an unplanned closure would be far more costly. In addition to avoiding the higher costs of an unplanned closure, the planned closure allowed institutions like CME to prepare for the changes and enact an organized response.

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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
07/01/20	163	n/a	224	n/a	176	145
06/24/20	163	n/a	220	n/a	169	142

[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	6/26/2020	6/19/2020
Corn	IL–Gulf	-0.67	-0.65
Corn	NE–Gulf	-0.82	-0.78
Soybean	IA–Gulf	-1.08	-1.05
HRW	KS–Gulf	-2.08	-2.05
HRS	ND–Portland	-2.02	-2.09

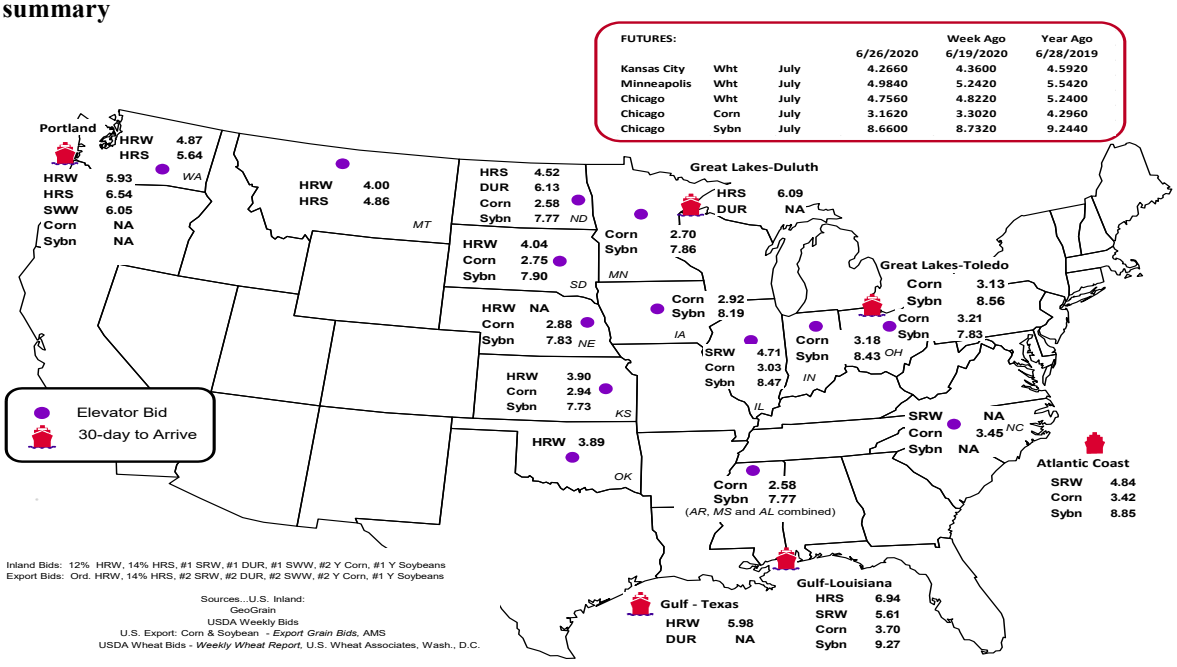
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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]
6/24/2020[p]	125	1,059	5,745	94	7,023	6/20/2020	1,978
6/17/2020[r]	431	1,113	4,913	123	6,580	6/13/2020	2,798
2020 YTD[r]	10,630	22,267	122,152	5,069	160,118	2020 YTD	59,312
2019 YTD[r]	24,680	30,964	138,059	9,082	202,785	2019 YTD	59,217
2020 YTD as % of 2019 YTD	43	72	88	56	79	% change YTD	100
Last 4 weeks as % of 2019[2]	13	87	111	62	86	Last 4wks. % 2019	90
Last 4 weeks as % of 4-year avg.[2]	37	90	93	80	88	Last 4wks. % 4 yr.	91
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.

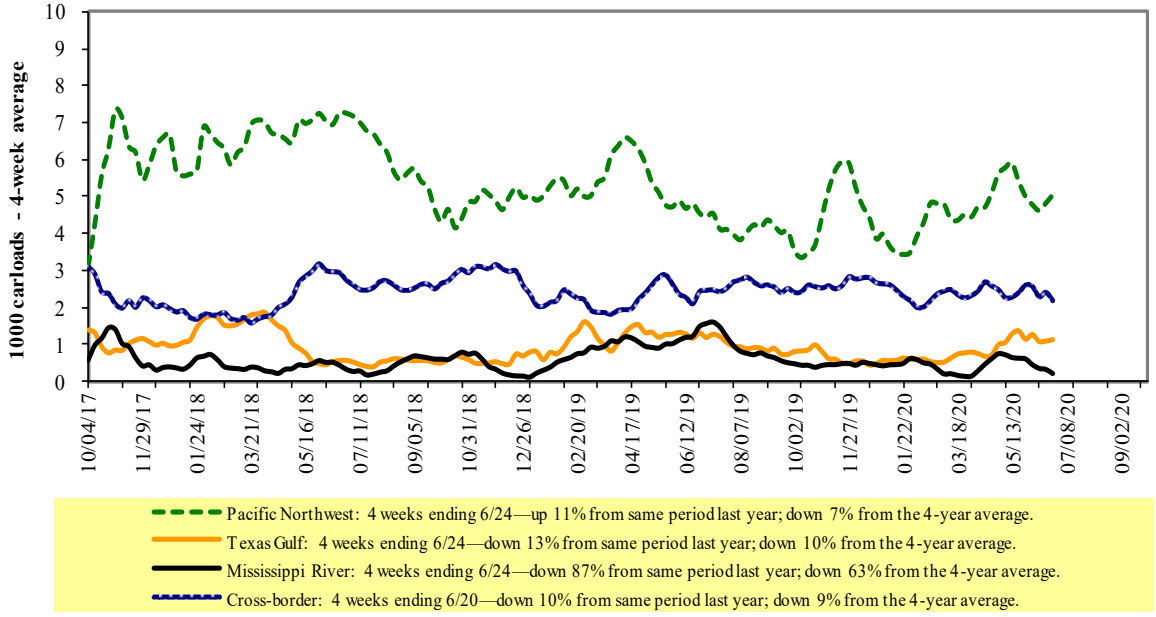
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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	
6/20/2020	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,361	2,381	11,815	1,154	4,726	21,437	4,961	5,035
This week last year	2,077	2,870	11,655	1,170	5,042	22,814	3,771	4,617
2020 YTD	41,920	58,352	268,502	25,958	123,856	518,588	98,605	110,125
2019 YTD	48,272	70,794	275,434	27,993	127,650	550,143	109,289	108,293
2020 YTD as % of 2019 YTD	87	82	97	93	97	94	90	102
Last 4 weeks as % of 2019*	91	81	100	83	108	98	98	107
Last 4 weeks as % of 3-yr. avg.**	92	84	92	95	103	94	114	103
Total 2019	91,611	137,060	568,369	58,527	260,269	1,115,836	212,486	235,892

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

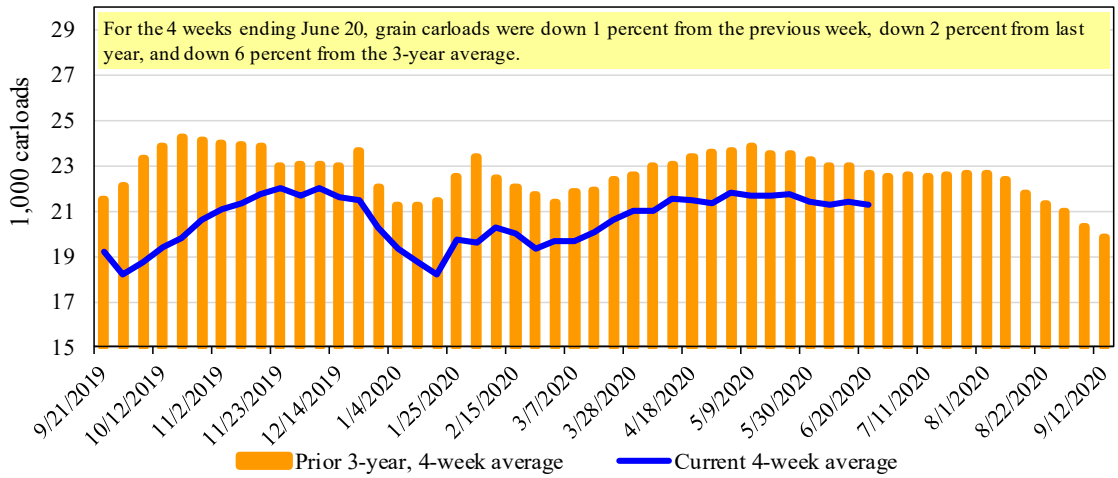
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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							
6/25/2020		Jul-20	Jul-19	Aug-20	Aug-19	Sep-20	Sep-19	Oct-20	Oct-19
BNSF[3]	COT grain units	0	no bids	no bids	no bids	no bids	0	no bids	0
	COT grain single-car	0	25	0	2	0	21	0	24
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.

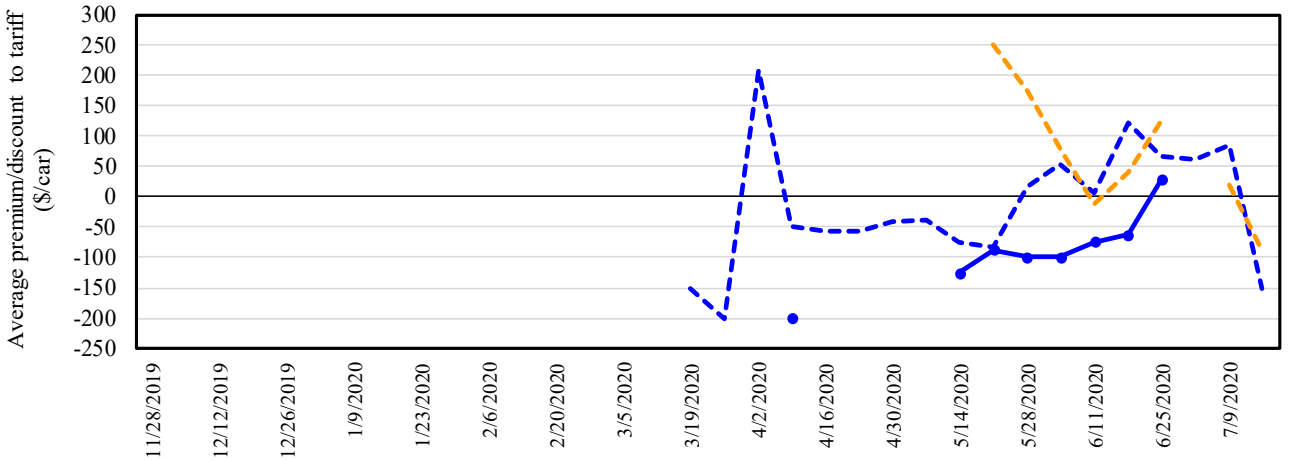
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

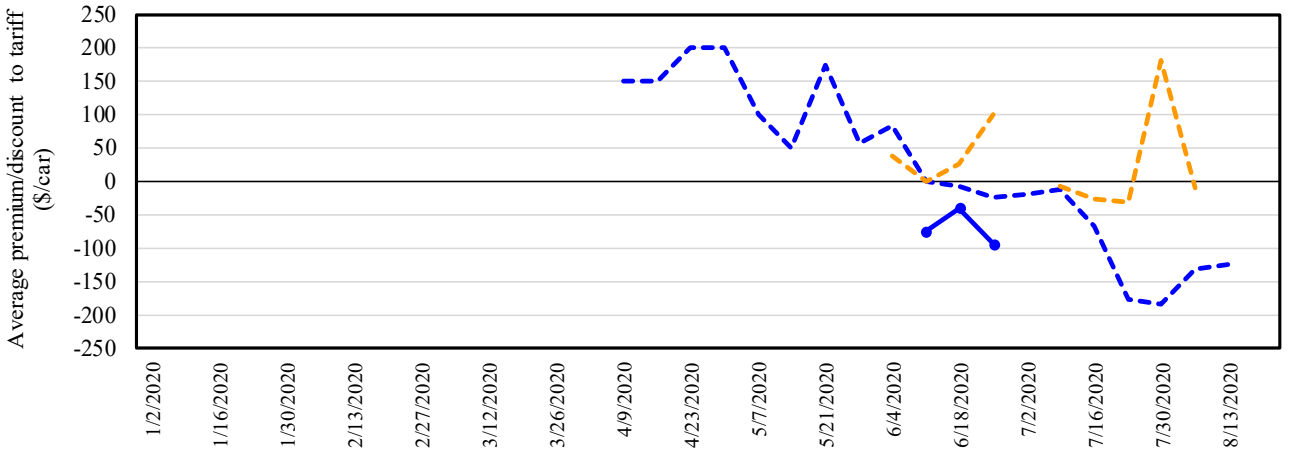


6/25/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$118	$175

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $91 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



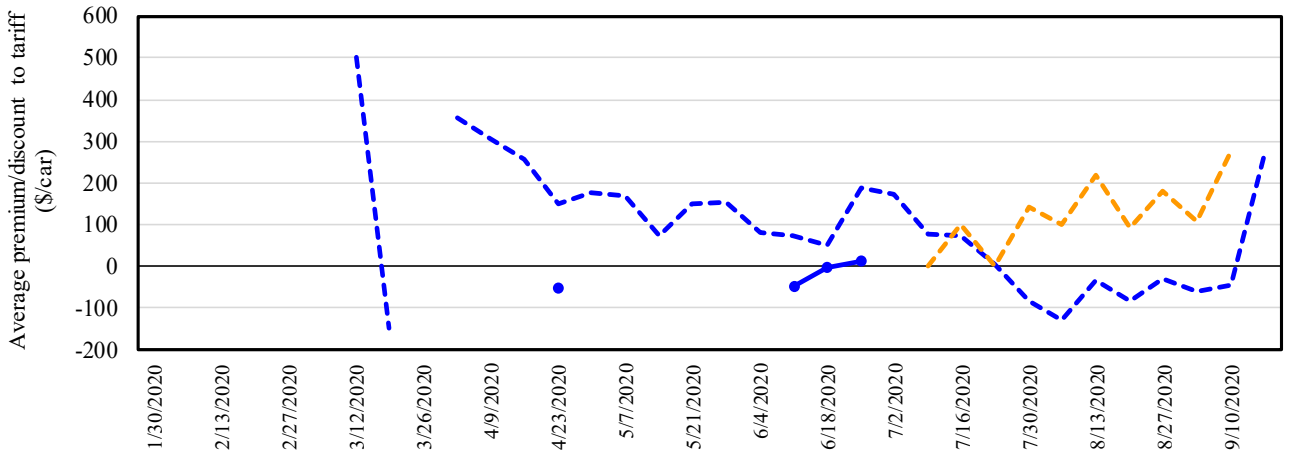
6/25/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$150	-$38

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $53 this week and are $53 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 September 2020, secondary market



6/25/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$44	-$19

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $14 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: 6/25/2020	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**	**(118)**	**(150)**	**44**	**n/a**	**n/a**	**n/a**
	Change from last week	32	(100)	15	n/a	n/a	n/a
	Change from same week 2019	8	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**175**	**(38)**	**(19)**	**350**	**300**	**100**
	Change from last week	150	(7)	13	0	(50)	(50)
	Change from same week 2019	241	n/a	n/a	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]

July 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	$30	$39.85	$1.08	-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	$53	$45.47	$1.24	-3
	Sioux Falls, SD	Galveston-Houston, TX	$6,976	$0	$69.28	$1.89	0
	Colby, KS	Galveston-Houston, TX	$4,801	$59	$48.26	$1.31	-3
	Amarillo, TX	Los Angeles, CA	$5,121	$81	$51.66	$1.41	-4
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,900	$60	$39.33	$1.00	-2
	Toledo, OH	Raleigh, NC	$6,816	$0	$67.69	$1.72	4
	Des Moines, IA	Davenport, IA	$2,415	$13	$24.11	$0.61	12
	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	$38	$38.11	$0.97	1
	Des Moines, IA	Los Angeles, CA	$5,680	$109	$57.49	$1.46	-2
Soybeans	Minneapolis, MN	New Orleans, LA	$3,631	$30	$36.35	$0.99	-5
	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	$60	$46.73	$1.27	-1
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	$96	$60.65	$1.65	-4
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	$60	$38.53	$0.98	-2
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	0
	Des Moines, IA	Amarillo, TX	$4,220	$47	$42.38	$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	$70	$49.10	$1.34	-2
	Toledo, OH	Huntsville, AL	$4,805	$0	$47.72	$1.30	4
	Grand Island, NE	Portland, OR	$5,260	$98	$53.21	$1.45	-12

[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: July 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	$42	$69.65	$1.89	-2
	KS	Guadalajara, JA	$7,534	$410	$81.16	$2.21	-3
	TX	Salinas Victoria, NL	$4,329	$25	$44.49	$1.21	-2
Corn	IA	Guadalajara, JA	$8,902	$325	$94.28	$2.39	-1
	SD	Celaya, GJ	$8,140	$0	$83.17	$2.11	0
	NE	Queretaro, QA	$8,278	$86	$85.46	$2.17	-2
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,643	$84	$78.95	$2.00	-2
	SD	Torreon, CU	$7,690	$0	$78.57	$1.99	0
Soybeans	MO	Bojay (Tula), HG	$8,547	$306	$90.45	$2.46	-2
	NE	Guadalajara, JA	$9,172	$313	$96.91	$2.63	0
	IA	El Castillo, JA	$9,490	$0	$96.97	$2.64	4
	KS	Torreon, CU	$7,964	$205	$83.47	$2.27	0
Sorghum	NE	Celaya, GJ	$7,772	$279	$82.26	$2.09	-3
	KS	Queretaro, QA	$8,108	$52	$83.37	$2.12	0
	NE	Salinas Victoria, NL	$6,713	$42	$69.01	$1.75	0
	NE	Torreon, CU	$7,092	$181	$74.32	$1.89	-3

[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.

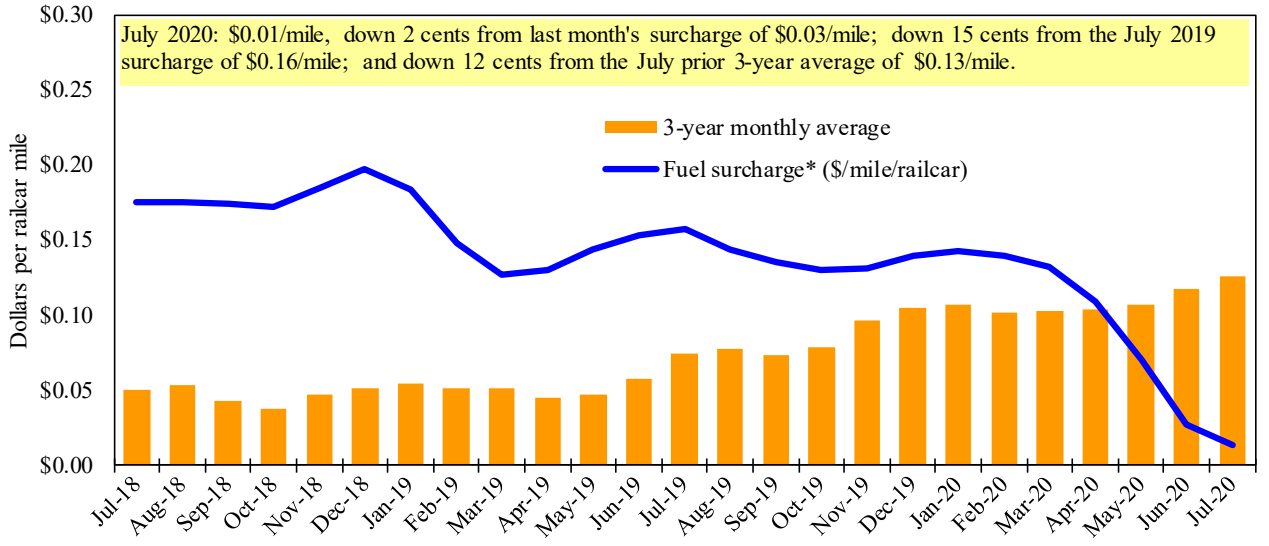
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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.

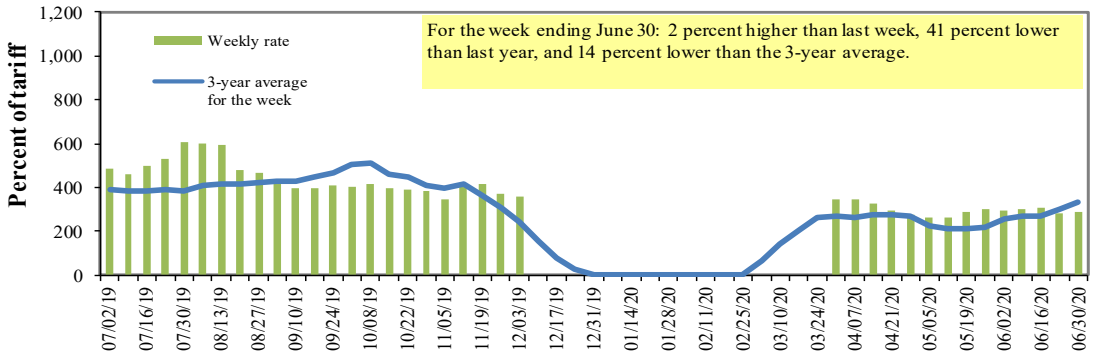
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

**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

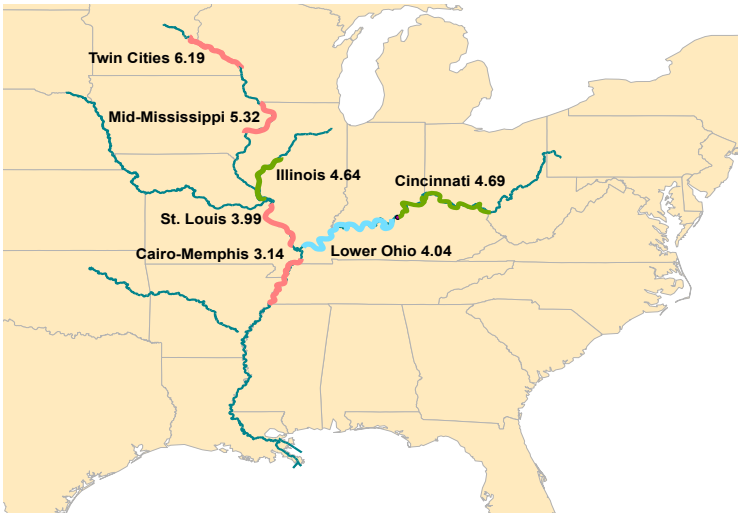
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	6/30/2020	373	288	-	183	186	186	180
	6/23/2020	367	283	-	200	183	183	182
$/ton	6/30/2020	23.09	15.32	-	7.30	8.72	7.51	5.65
	6/23/2020	22.72	15.06	-	7.98	8.58	7.39	5.71
Current week % change from the same week:								
	Last year	-19	-41	-	-36	-32	-32	-36
	3-year avg. [2]	-16	-30	-	-36	-34	-35	-28
Rate[1]	August	378	306	-	240	246	246	238
	October	462	449	447	363	444	444	352

[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

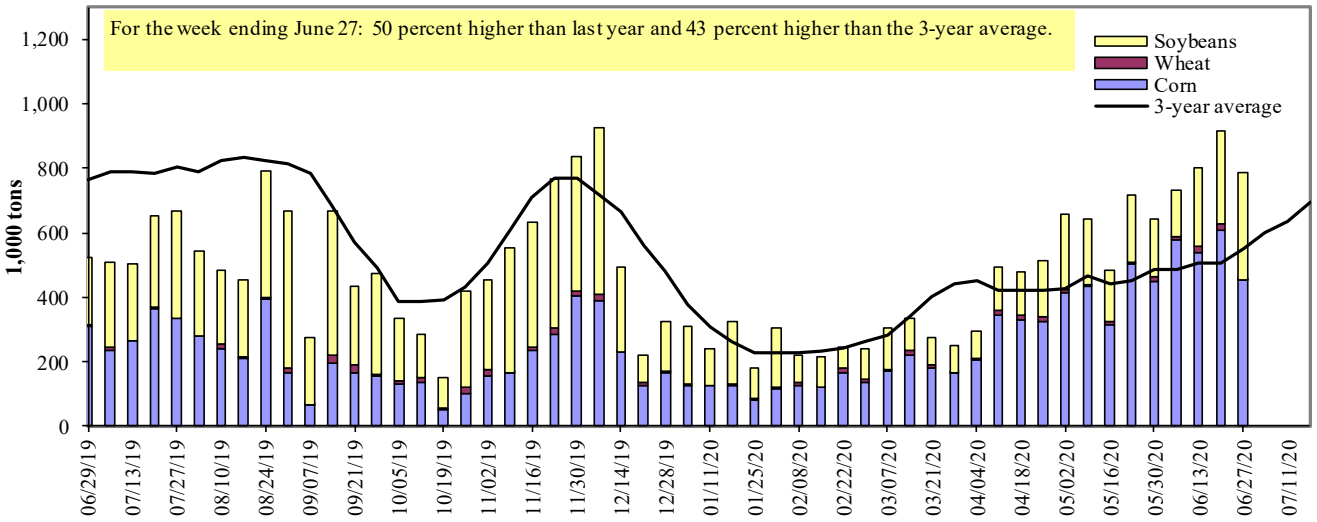
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 06/27/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	197	2	81	0	279
Winfield, MO (L25)	266	3	156	0	425
Alton, IL (L26)	478	3	316	10	807
Granite City, IL (L27)	453	3	331	10	796
Illinois River (La Grange)	119	0	114	10	243
Ohio River (Olmsted)	17	4	16	0	36
Arkansas River (L1)	1	24	11	0	36
Weekly total - 2020	471	30	358	10	869
Weekly total - 2019	379	20	337	3	740
2020 YTD[1]	9,480	853	6,013	90	16,437
2019 YTD[1]	5,974	919	4,534	74	11,502
2020 as % of 2019 YTD	159	93	133	122	143
Last 4 weeks as % of 2019[2]	301	255	183	836	249
Total 2019	12,780	1,631	14,683	154	29,247

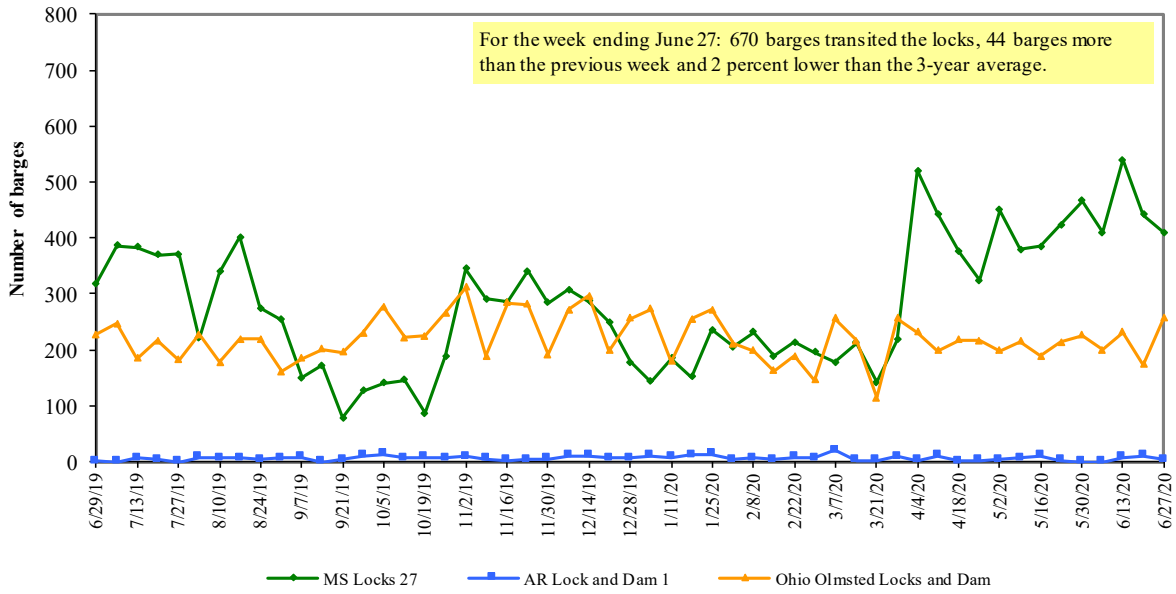
[1] Weekly total, YTD (year-to-date), and calendar year total include MS/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. L (as in "L15") refers to a lock or lock and dam facility. Olmsted = Olmsted Locks and Dam. La Grange = La Grange Lock and Dam.

[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

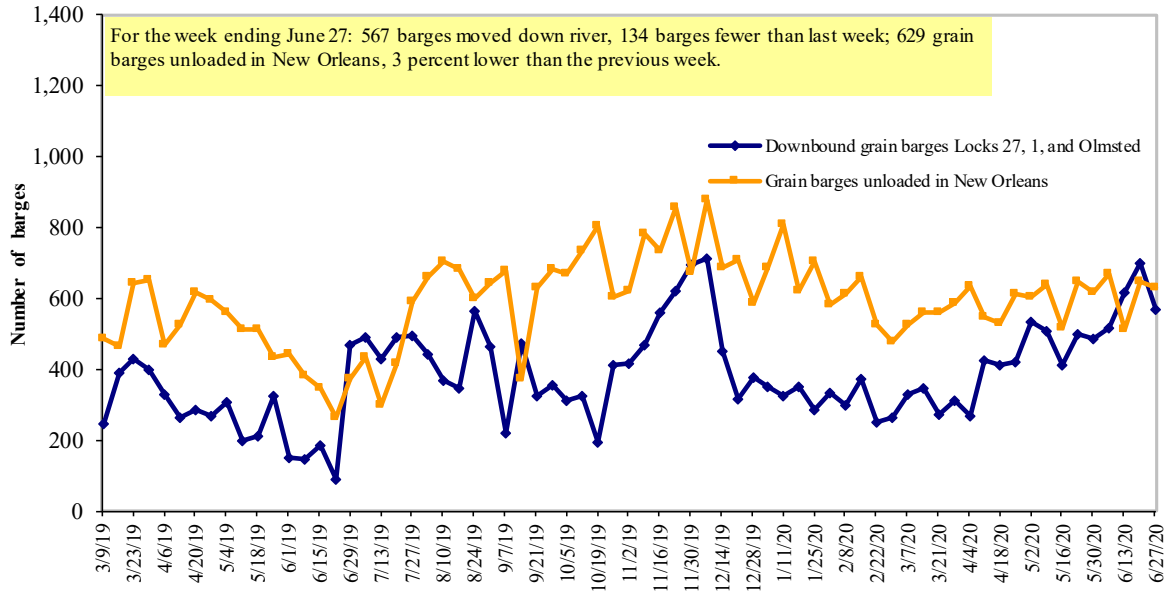
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 6/29/2020 (U.S. $/gallon)

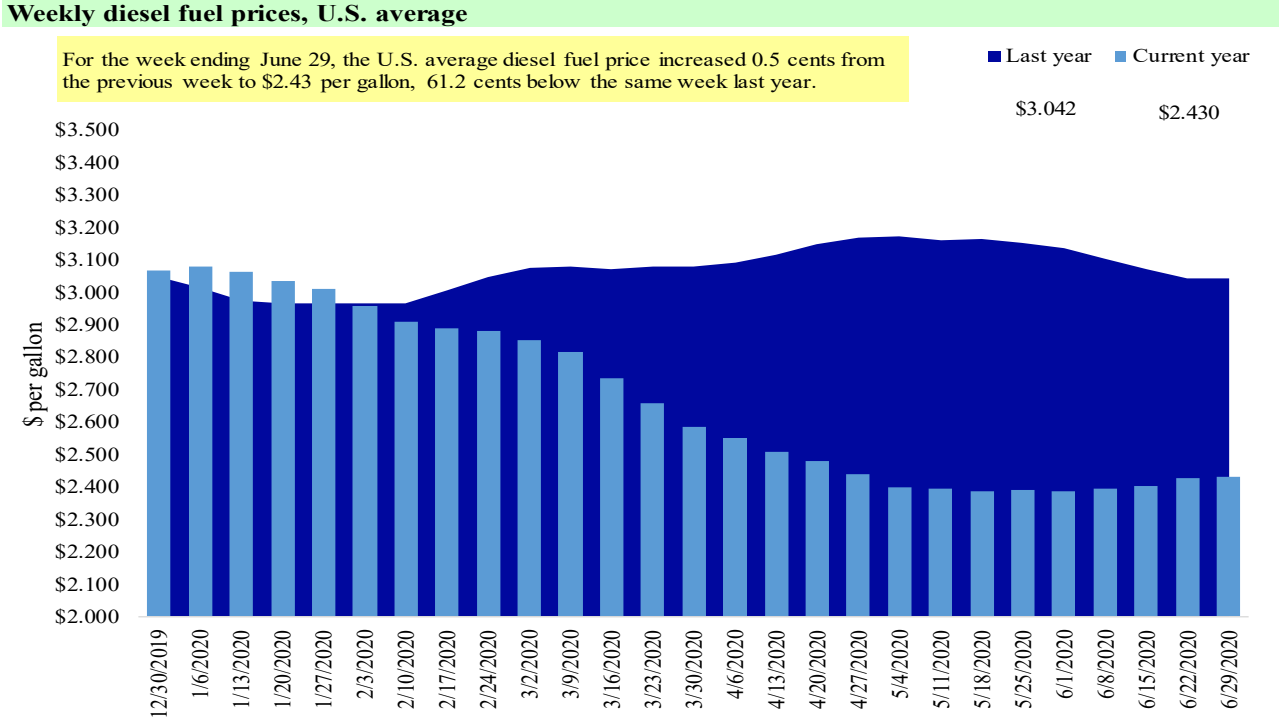
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.524	0.009	-0.556
	New England	2.648	0.017	-0.487
	Central Atlantic	2.704	0.010	-0.566
	Lower Atlantic	2.377	0.007	-0.564
II	Midwest	2.299	0.010	-0.625
III	Gulf Coast	2.194	-0.003	-0.609
IV	Rocky Mountain	2.343	-0.010	-0.655
V	West Coast	2.948	0.003	-0.680
	West Coast less California	2.586	-0.005	-0.619
	California	3.246	0.009	-0.717
Total	United States	2.430	0.005	-0.612

[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]									
6/18/2020	1,988	601	1,643	1,028	224	5,483	9,510	7,893	22,885
This week year ago	2,134	946	1,394	1,070	174	5,718	6,144	10,544	22,406
Cumulative exports-marketing year[2]									
2019/20 YTD	603	43	319	319	85	1,369	32,443	36,909	70,720
2018/19 YTD	688	52	298	138	55	1,230	42,596	37,052	80,878
YTD 2019/20 as % of 2018/19	88	84	107	232	156	111	76	100	87
Last 4 wks. as % of same period 2018/19*	78	48	111	90	110	84	172	70	102
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 6/18/2020	Total commitments[2]			% change	Exports[3]
	2020/21 next MY	2019/20 current MY	2018/19 last MY*	current MY from last MY	3-yr. avg. 2016-18
		- 1,000 mt -			
Mexico	1,688	13,988	15,159	(8)	14,659
Japan	542	9,362	11,888	(21)	11,955
Korea	0	2,568	3,694	(31)	4,977
Colombia	20	4,195	4,581	(8)	4,692
Peru	40	336	1,992	(83)	2,808
Top 5 importers	**2,290**	**30,448**	**37,314**	**(18)**	**39,091**
Total U.S. corn export sales	**3,630**	**41,952**	**48,740**	**(14)**	**54,024**
% of projected exports	7%	93%	93%		
Change from prior week[2]	**77**	**462**	**295**		
Top 5 importers' share of U.S. corn export sales	63%	73%	77%		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 6/18/2020	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	3,441	15,775	13,716	15	25,733
Mexico	585	4,574	4,830	(5)	4,271
Indonesia	0	1,896	2,091	(9)	2,386
Japan	90	2,344	2,420	(3)	2,243
Egypt	0	3,406	2,645	29	1,983
Top 5 importers	**4,116**	**27,995**	**25,702**	**9**	**36,616**
Total U.S. soybean export sales	**6,095**	**44,801**	**47,596**	**(6)**	**53,746**
% of projected exports	11%	100%	100%		
change from prior week[2]	**561**	**602**	**168**		
Top 5 importers' share of U.S. soybean export sales	68%	62%	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 6/18/2020	commitments[2]		% change current MY from last MY	Exports[3] 3-yr. avg. 2017-19
	2020/21 current MY	2019/20 last MY		
		- 1,000 mt -		- 1,000 mt -
Mexico	543	841	(35)	3,213
Philippines	1,011	859	18	2,888
Japan	682	645	6	2,655
Nigeria	340	471	(28)	1,433
Korea	516	302	71	1,372
Indonesia	185	238	(22)	1,195
Taiwan	263	280	(6)	1,175
Thailand	174	198	(12)	727
Italy	195	90	118	622
Colombia	119	220	(46)	618
Top 10 importers	**4,029**	**4,143**	(3)	**15,897**
Total U.S. wheat export sales	**6,852**	**6,948**	(1)	**23,821**
% of projected exports	26%	26%		
change from prior week[2]	**519**	**612**		
Top 10 importers' share of U.S. wheat export sales	59%	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 06/25/20	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	410	345	119	7,946	6,886	115	150	118	13,961
Corn	442	387	114	5,253	6,211	85	280	107	7,047
Soybeans	11	0	n/a	2,747	4,956	55	1	2	11,969
Total	**863**	**732**	**118**	**15,945**	**18,052**	**88**	**126**	**92**	**32,977**
Mississippi Gulf									
Wheat	45	172	26	1,864	2,663	70	150	123	4,448
Corn	568	691	82	14,997	12,643	119	208	116	20,763
Soybeans	219	182	120	10,435	11,811	88	62	73	31,398
Total	**832**	**1,045**	**80**	**27,296**	**27,117**	**101**	**129**	**102**	**56,609**
Texas Gulf									
Wheat	70	129	54	2,074	3,721	56	56	73	6,009
Corn	35	0	n/a	409	362	113	212	152	640
Soybeans	0	0	n/a	7	0	n/a	n/a	0	2
Total	**105**	**129**	**81**	**2,489**	**4,083**	**61**	**63**	**77**	**6,650**
Interior									
Wheat	18	62	28	1,132	851	133	120	146	1,987
Corn	168	195	86	4,069	3,753	108	101	89	7,857
Soybeans	107	79	136	3,176	3,309	96	70	76	7,043
Total	**292**	**337**	**87**	**8,376**	**7,912**	**106**	**91**	**89**	**16,887**
Great Lakes									
Wheat	0	13	0	299	455	66	91	138	1,339
Corn	0	0	n/a	0	0	n/a	n/a	0	11
Soybeans	0	0	n/a	61	189	32	41	45	493
Total	**0**	**13**	**0**	**359**	**644**	**56**	**66**	**64**	**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	5	7	64	405	656	62	34	26	1,353
Total	**5**	**7**	**64**	**419**	**773**	**54**	**35**	**29**	**1,489**
U.S. total from ports*									
Wheat	542	722	75	13,319	14,607	91	114	110	27,781
Corn	1,213	1,273	95	24,736	23,053	107	192	107	36,417
Soybeans	341	269	127	16,830	20,921	80	46	55	52,258
Total	**2,097**	**2,264**	**93**	**54,885**	**58,582**	**94**	**112**	**93**	**116,457**

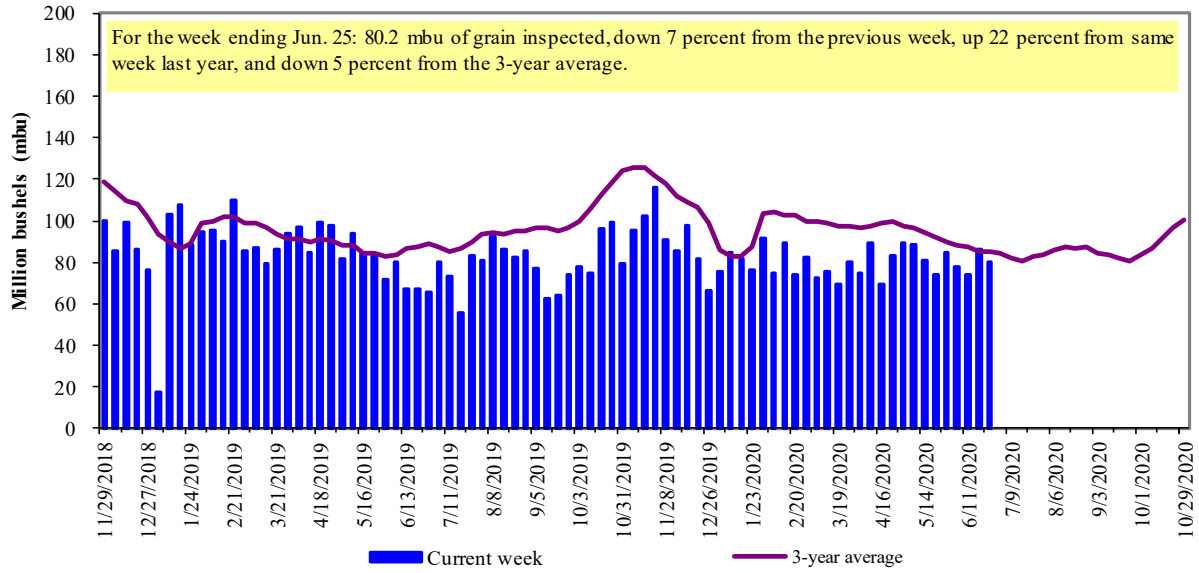
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

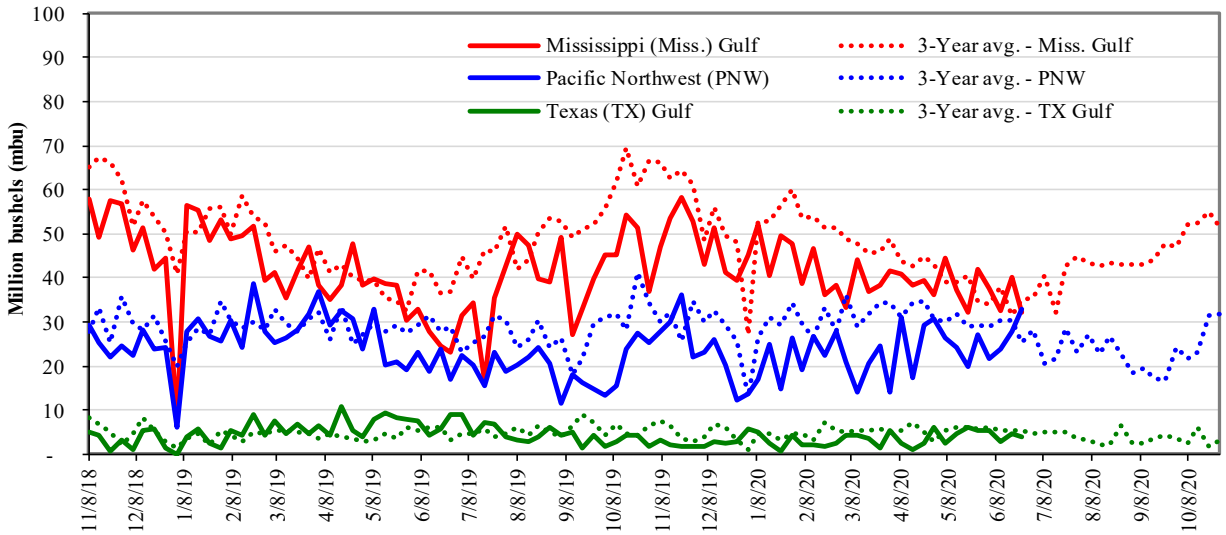


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 06/25/20 inspections (mbu):	
MS Gulf:	32.1
PNW:	32.9
TX Gulf:	4.0

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	down 20	down 17	down 20	up 18
Last Year (same wk):	up 38	down 57	up 11	up 94
3-yr avg. (4-wk. mov. Avg):	down 7	down 28	down 10	up 15

Source: USDA, Federal Grain Inspection Service.

Table 17

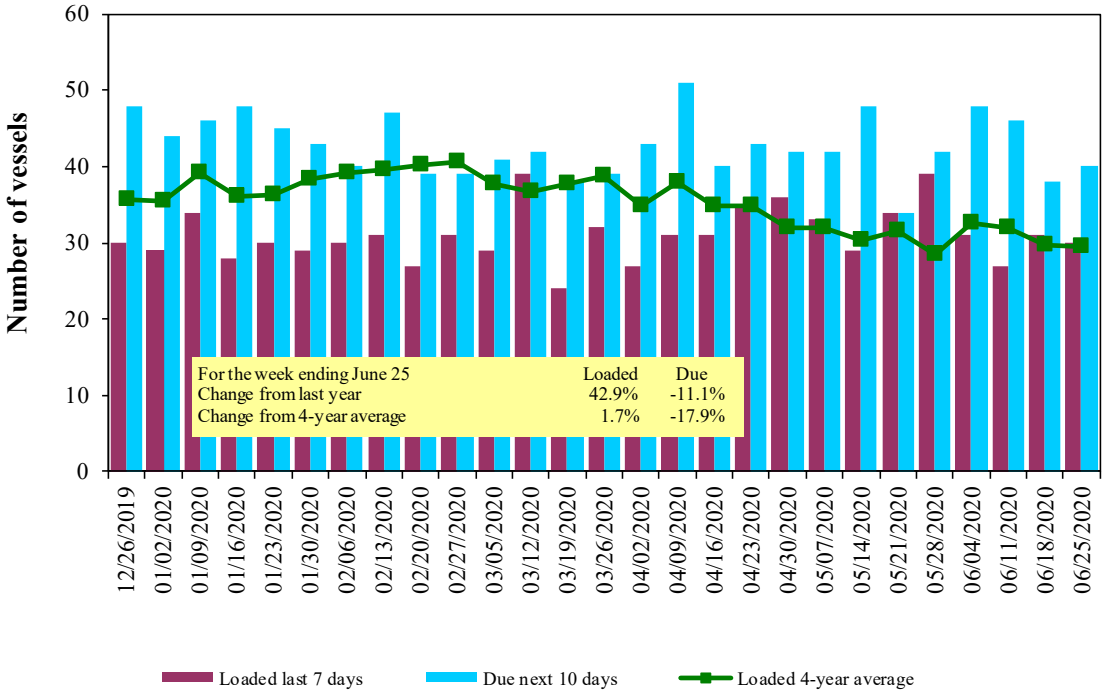
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
6/25/2020	26	30	40	18
6/18/2020	29	31	38	18
2019 range	(26…61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service.

Figure 16

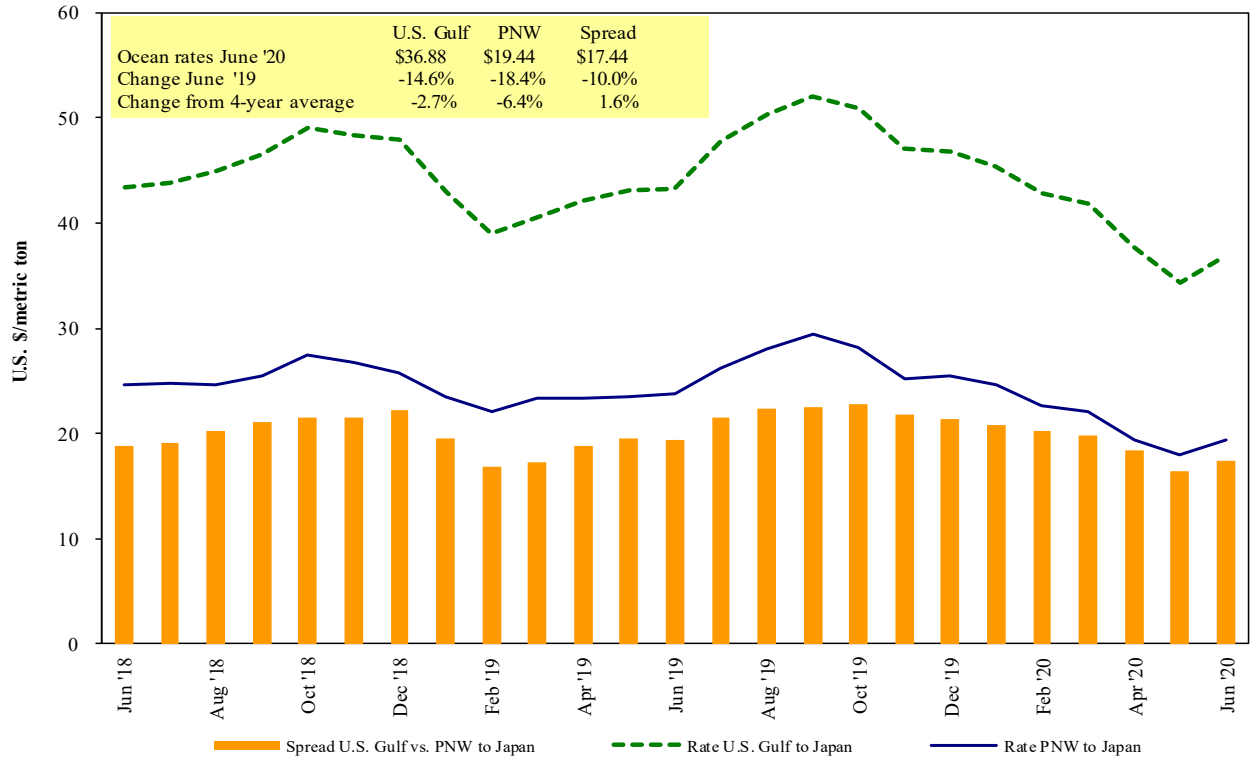
U.S. Gulf[1] vessel loading activity



[1]U.S. Gulf includes Mississippi, Texas, and East Gulf.
Source:USDA, Agricultural Marketing Service.

Figure 17

Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest.

Source: O'Neil Commodity Consulting.

Table 18

Ocean freight rates for selected shipments, week ending 06/27/2020

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	Jul 1/10	40,000	46.94*
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	Pakistan	Heavy grain	Jun 19/29	70,000	21.85

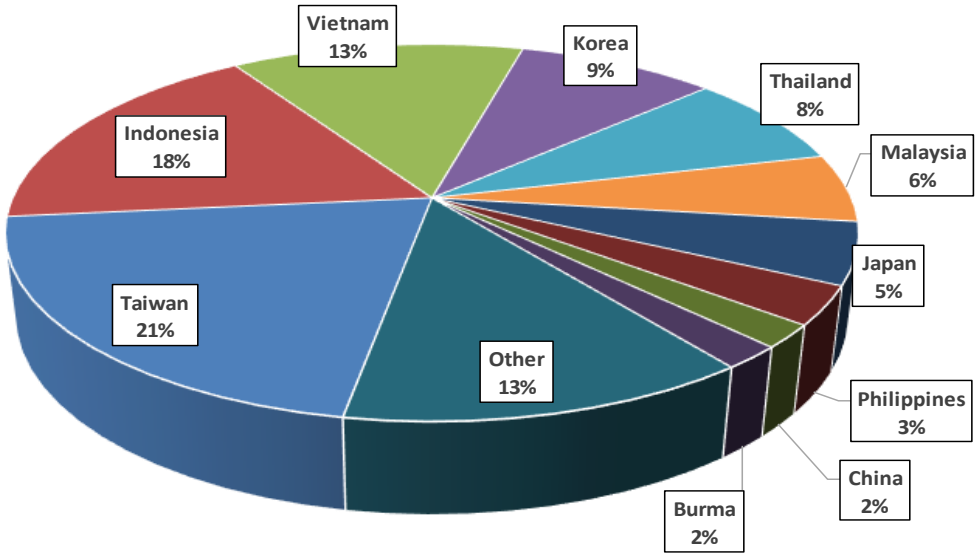
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

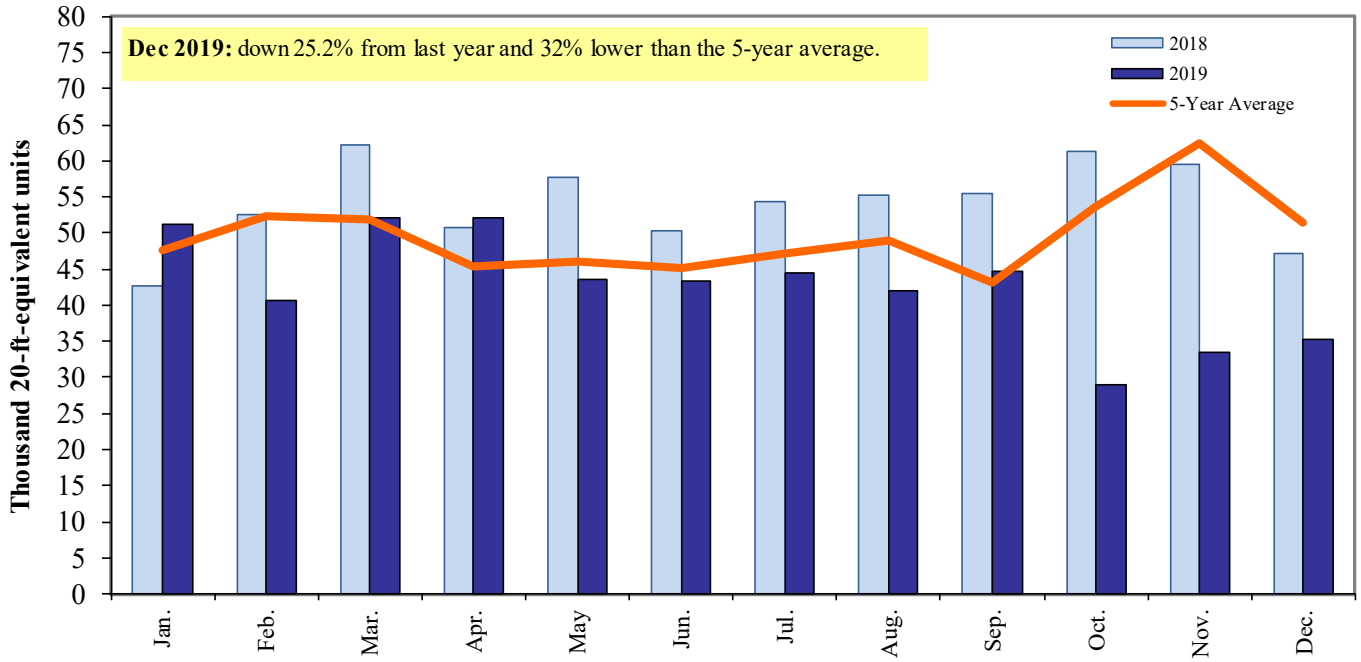
Figure 18
Top 10 destination markets for U.S. containerized grain exports, 2019



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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