



# Grain Transportation Report

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

Contact Us

August 20, 2020

## WEEKLY HIGHLIGHTS

### FMCSA Extends HOS for Livestock and Feed

On August 11, the Federal Motor Carrier Safety Administration (FMCSA) [extended the national emergency hours of service \(HOS\) waiver](#) for trucks transporting livestock and feed. The extension is valid through September 14. The waiver specifically does not cover drivers carrying mixed loads with only a “nominal quantity” of a waiver-qualifying item.

### Accidents Briefly Snarl Mississippi River Barge Traffic

Two separate incidents last week caused delays for barge tows along the Mississippi River. Affecting grain barge traffic in both directions, the delays continued into this week. On Wednesday, August 12, a tug being towed by another vessel sunk at upper Mississippi mile 43 near Thebes, IL. Because of little clearance over the vessel, navigation through the area was restricted. On Sunday, August 16, a salvage operation lifted the wreck, and operations began returning to normal. A more minor incident occurred on Friday, August 14, at the Mel Price Lock and Dam facility near St. Louis. A barge struck the wall of the main lock, causing a brief closure for inspection. The auxiliary lock had already been closed for planned repairs, resulting in a brief closure of traffic through the area. The main lock reopened by the end of the day. Neither accident caused injuries.

### Mississippi River Commission To Hold Public Meetings on August 24, 26, and 28

The Mississippi River Commission (MRC) will hold [in-person public meetings](#) on August 24 in Caruthersville, MO; on August 26 in Greenville, MS; and on August 28 in Morgan City, LA, during MRC’s annual low-water inspection trip. The meetings will cover national and regional issues affecting U.S. Army Corps of Engineers (USACE) and MRC programs and projects on the Mississippi River and its tributaries. The events will also give an overview of current project issues in the St. Louis, Memphis, and Vicksburg Districts. Finally, local organizations and members of the public will express their views on issues related to USACE and MRC programs and projects. The events will adhere to local COVID-19-related restrictions for face-to-face meetings. All segments will be video-recorded and posted to the MRC webpage and to each local USACE district’s webpage. Further meeting details [here](#).

### U.S. DOT Creates Toolkit To Help Rural Grant Applicants

On July 27, the U.S. Department of Transportation [released a toolkit](#) designed to help stakeholders participate in the Rural Opportunities to Use Transportation for Economic Success program (ROUTES). The program aims to collect input on rural infrastructure needs and share user-friendly information on applying for DOT discretionary grants. Designed for applicants with varying levels of experience, the toolkit aims to help rural applicants understand and navigate DOT’s discretionary grant funding opportunities. Specifically, the toolkit outlines applicant requirements and sorts grant programs by applicant type and eligible project activities.

## Snapshots by Sector

### Export Sales

For the week ending August 06, **unshipped balances** of wheat, corn, and soybeans totaled 16.2 million metric tons (mmt). This represented a 22-percent increase in outstanding sales from the same time last year. Net **corn export sales** were 0.377 mmt, up significantly from last week. Net **soybean export sales** were 0.570 mmt, up 65 percent from the previous week. Net **wheat export sales** were 0.368 mmt, down 39 percent from the previous week.

### Rail

U.S. Class I railroads originated 22,081 **grain carloads** during the week ending August 8. This was a 4-percent increase from the previous week, 4 percent more than last year, and 4 percent more than the 3-year average.

Average August shuttle **secondary railcar** bids/offers (per car) were \$300 above tariff for the week ending August 13. This was \$13 more than last week. There were no shuttle bids/offers this week last year. There were no non-shuttle bids/offers this week.

### Barge

For the week ending August 15, **barge grain movements** totaled 921,810 tons. This was 47 percent more than the previous week and 68 percent more than the same period last year.

For the week ending August 15, 578 grain barges **moved down river**—179 more barges than the previous week. There were 734 grain barges **unloaded in New Orleans**, 8 percent fewer than the previous week.

### Ocean

For the week ending August 13, 29 **oceangoing grain vessels** were loaded in the U.S. Gulf—34 percent fewer than the same period last year. Within the next 10 days (starting August 14), 42 vessels were expected to be loaded—5 percent fewer than the same period last year.

As of August 13, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$44.50. This was 5 percent more than the previous week. The rate from the Pacific Northwest to Japan was \$24.75 per mt, 7 percent more than the previous week.

### Fuel

For the week ending August 17, the U.S. average **diesel fuel price** decreased 0.1 cents from the previous week to \$2.427 per gallon, 56.7 cents below the same week last year.

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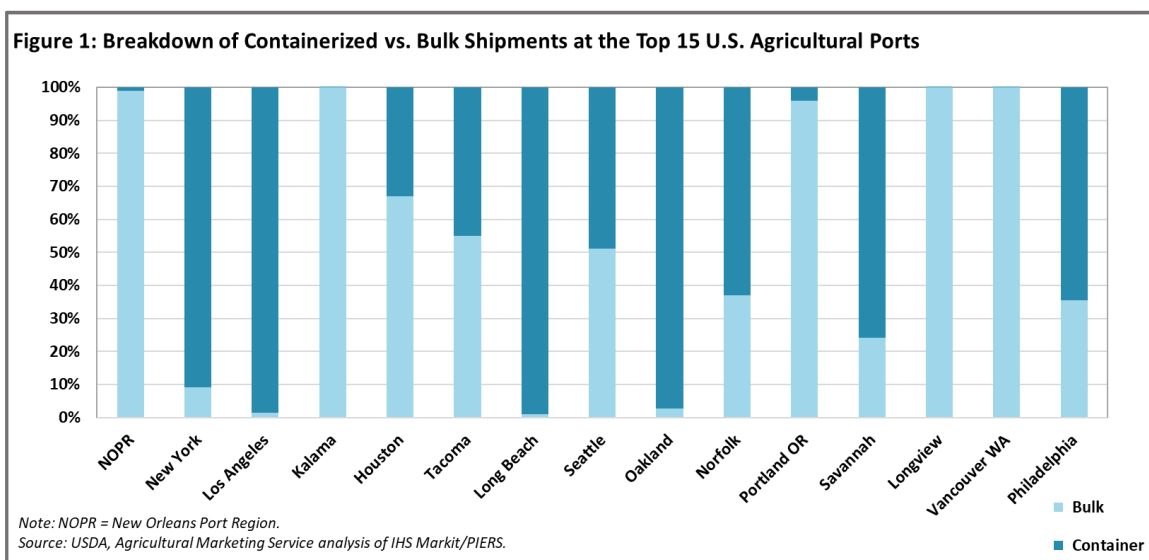
## U.S. Waterborne Agricultural Trade in Containers—on USDA’s Open Data Platform

On June 1, 2020, the Transportation Services Division (TSD) of USDA’s Agricultural Marketing Service (AMS) launched an upgraded version of its interactive [Agricultural Transportation Open Data Platform](#), also known as “AgTransport 2.0.” The platform enables decision makers across the agricultural supply chain to interact with, visualize, and share data and make better, data-driven decisions. This week’s feature highlights three new AgTransport 2.0 stories showcasing the role of marine shipping containers in U.S. waterborne agricultural exports and imports. The three stories include U.S. Agricultural Port Profiles, U.S. Waterborne Containerized Grain Exports, and Container Ship Fleet Data.

### U.S. Agricultural Port Profiles

The U.S. waterborne and port transportation systems are essential in shipping agricultural products to customers around the world. The open data platform uses aggregated bill-of-lading data from IHS Markit’s PIERS dataset to provide user-friendly access to complex waterborne transportation statistics. The “U.S. Agricultural Port Profiles” story

delivers port-level information for agricultural exports and imports. The data detail containerized and bulk commodities, as well as refrigerated and dry shipments, through the busiest U.S. agricultural ports. Destination and origin markets are also included.



The platform offers filters and drill-down options making the datasets and visualizations more granular by selecting ports, commodities, and/or years and months—revealing trends over the past 10 years. Figure 1 is one view of many data visualizations in this story. On the platform, the figure 1 visualization can be filtered for export or import shipments, year, and month. A similar visualization in the story depicts the breakdown of refrigerated and dry commodities by U.S. port.

### U.S. Waterborne Containerized Grain Exports

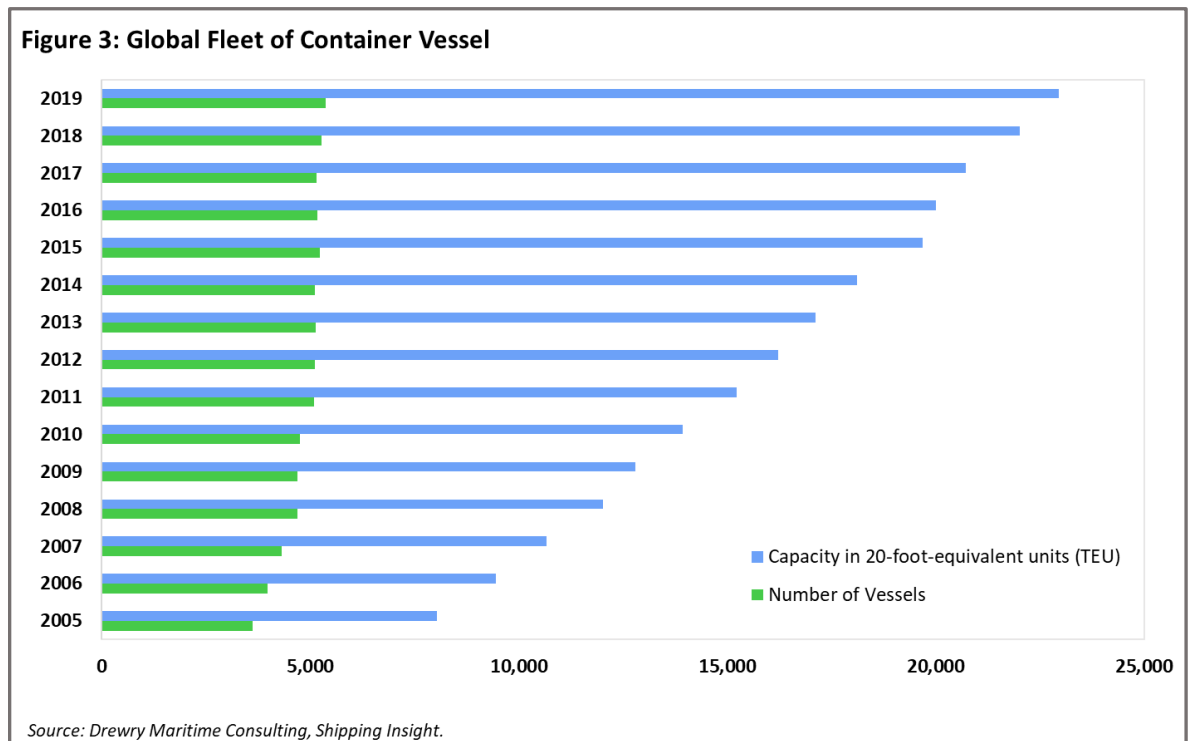
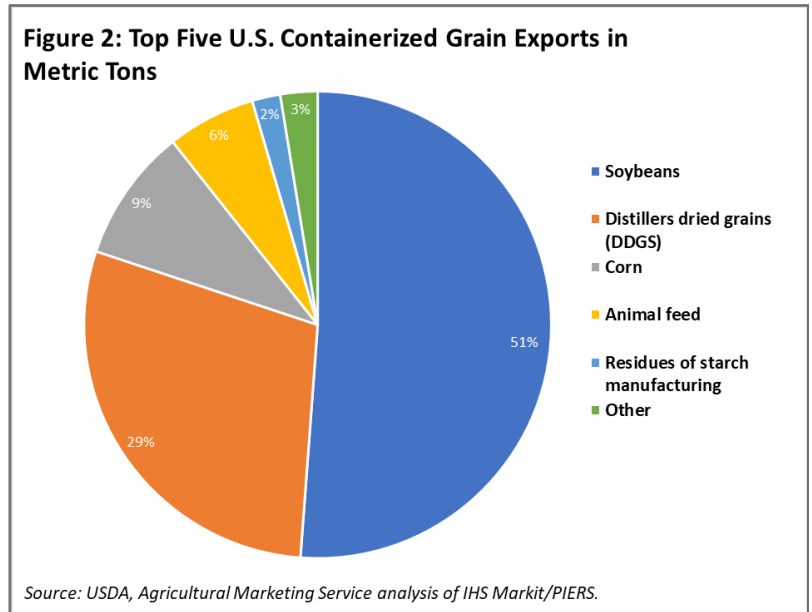
The platform’s interactive story on “U.S. Waterborne Containerized Grain Exports” highlights grain’s role as the top U.S. containerized agricultural export commodity. Over the past two decades, containers have become integral to the grain export supply chain. Although containers move less than 10 percent of total waterborne export volumes of U.S. grain annually, containers are crucial for serving niche markets that bulk carriers cannot serve. Such niche markets include identity-preserved grain markets and customers with smaller volume demands. The platform allows users to monitor overall trends in containerized grain exports from 2017 to present. On the

form allows users to monitor overall trends in containerized grain exports from 2017 to present. On the platform, the visualization shown in figure 2 allows filtering by year, month, destination country, and commodity. Users can also dissect the market and monitor trends for specific grain products by port and destination market. Finally, spot ocean freight rates for two selected trade lanes—Los Angeles and Chicago to Shanghai, China—are presented to provide readers a full picture of the market.

### Container Ship Fleet Data

The global use of containerized transportation has grown exponentially since its introduction in the mid-1950s. As early as the 1970s, the inventor of the intermodal container, Malcom McLean, pushed the industry toward larger ships, understanding the efficiencies gained from moving more containers per voyage. To this day, ocean container carriers challenge the laws of physics, building larger and larger vessels, to move ever more containers over ever-increasing distances. In the platform’s interactive story on “Container Ship Fleet Data,” the visualization for figure 3 shows the growth in both size and quantity of container ships over the past 15 years as carriers have sought greater economies of scale and overall operational efficiency. Users can filter these data by year and by vessel size category.

**Find More on the Agricultural Transportation Open Data Platform**  
 Visit the [Agricultural Transportation Open Data Platform](#) for more updates related to container data. Among these are interactive data visualizations tracking how ocean container rates have shifted relative to growth in the worldwide vessel fleet. Other visualizations illustrate how shares of containerized grain exports have shifted among select destination countries over time. The updated platform also includes new datasets and stories on bulk ocean vessel fleet data, ethanol transportation, modal share analysis of U.S. grain transportation, and agriculture by rail. [april.taylor@usda.gov](mailto:april.taylor@usda.gov)



worldwide vessel fleet. Other visualizations illustrate how shares of containerized grain exports have shifted among select destination countries over time. The updated platform also includes new datasets and stories on bulk ocean vessel fleet data, ethanol transportation, modal share analysis of U.S. grain transportation, and agriculture by rail. [april.taylor@usda.gov](mailto:april.taylor@usda.gov)

# Grain Transportation Indicators

Table 1

**Grain transport cost indicators<sup>1</sup>**

| For the week ending | Truck | Rail       |         | Barge* | Ocean |         |
|---------------------|-------|------------|---------|--------|-------|---------|
|                     |       | Unit train | Shuttle |        | Gulf  | Pacific |
| 08/19/20            | 163   | 280        | 234     | 202    | 199   | 172     |
| 08/12/20            | 163   | 280        | 234     | 188    | 190   | 161     |

<sup>1</sup>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);

\*Due to the closure of several lock and dam facilities on Illinois River between July 1 and October 27, 2020, mid-Mississippi barge rate was substituted for Illinois rate as the benchmark for calculating cost index during the closures.

n/a = not available.

Source: USDA, Agricultural Marketing Service.

Table 2

**Market Update: U.S. origins to export position price spreads (\$/bushel)**

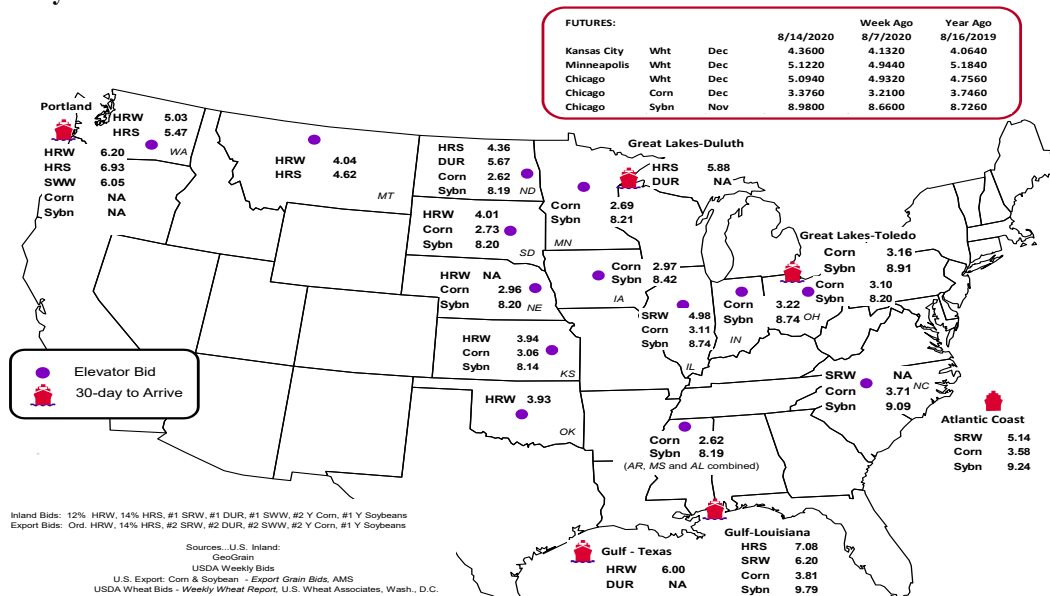
| Commodity | Origin-destination | 8/14/2020 | 8/7/2020 |
|-----------|--------------------|-----------|----------|
| Corn      | IL-Gulf            | -0.70     | -0.62    |
| Corn      | NE-Gulf            | -0.85     | -0.77    |
| Soybean   | IA-Gulf            | -1.37     | -1.30    |
| HRW       | KS-Gulf            | -2.06     | -2.06    |
| HRS       | ND-Portland        | -2.57     | -2.27    |

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)<sup>1</sup>

| For the week ending                           | Mississippi |            | Pacific   | Atlantic & | Total   | Week ending        | Cross-border Mexico <sup>3</sup> |
|---|-------------|------------|-----------|------------|---------|--------------------|----------------------------------|
|   | Gulf        | Texas Gulf | Northwest | East Gulf  |         |                    |                                  |
| 8/12/2020 <sup>p</sup>                        | 735         | 991        | 5,431     | 235        | 7,392   | 8/8/2020           | 2,780                            |
| 8/05/2020 <sup>r</sup>                        | 651         | 1,011      | 4,818     | 203        | 6,683   | 8/1/2020           | 2,468                            |
| 2020 YTD <sup>r</sup>                         | 13,903      | 28,590     | 151,612   | 6,423      | 200,528 | 2020 YTD           | 79,144                           |
| 2019 YTD <sup>r</sup>                         | 31,689      | 37,825     | 167,124   | 12,151     | 248,789 | 2019 YTD           | 77,357                           |
| 2020 YTD as % of 2019 YTD                     | 44          | 76         | 91        | 53         | 81      | % change YTD       | 102                              |
| Last 4 weeks as % of 2019 <sup>2</sup>        | 64          | 90         | 114       | 46         | 99      | Last 4wks. % 2019  | 105                              |
| Last 4 weeks as % of 4-year avg. <sup>2</sup> | 81          | 86         | 96        | 69         | 92      | Last 4wks. % 4 yr. | 121                              |
| 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                          |

<sup>1</sup>Data is incomplete as it is voluntarily provided.

<sup>2</sup>Compared with same 4-weeks in 2019 and prior 4-year average.

<sup>3</sup>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.

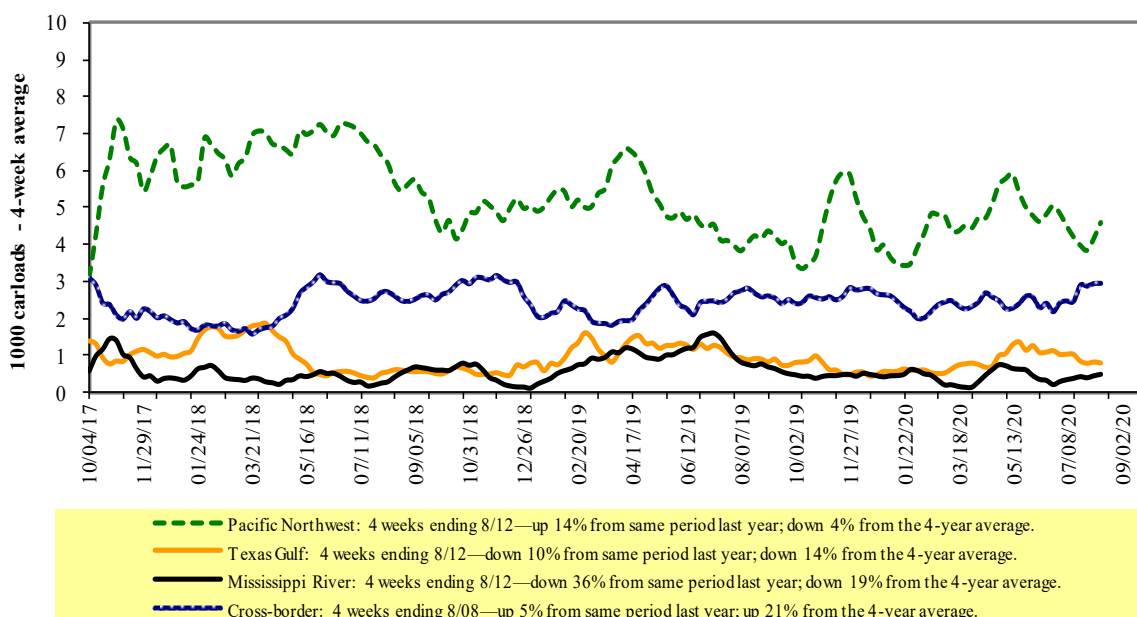
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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:<br>8/8/2020  | East   |         | West    |        |         | U.S. total | Canada  |         |
|-----------------------------------|--------|---------|---------|--------|---------|------------|---------|---------|
|                                   | CSXT   | NS      | BNSF    | KCS    | UP      |            | CN      | CP      |
| This week                         | 1,340  | 2,842   | 10,882  | 1,060  | 5,957   | 22,081     | 5,245   | 4,776   |
| This week last year               | 1,376  | 2,870   | 11,457  | 903    | 4,702   | 21,308     | 3,168   | 4,546   |
| 2020 YTD                          | 52,319 | 76,689  | 341,423 | 32,754 | 160,908 | 664,093    | 130,547 | 145,280 |
| 2019 YTD                          | 59,873 | 91,654  | 354,917 | 35,768 | 165,768 | 707,980    | 135,179 | 140,721 |
| 2020 YTD as % of 2019 YTD         | 87     | 84      | 96      | 92     | 97      | 94         | 97      | 103     |
| Last 4 weeks as % of 2019*        | 95     | 91      | 98      | 87     | 101     | 97         | 140     | 107     |
| Last 4 weeks as % of 3-yr. avg.** | 93     | 93      | 95      | 100    | 101     | 96         | 125     | 108     |
| Total 2019                        | 91,611 | 137,100 | 568,369 | 58,527 | 260,269 | 1,115,876  | 212,501 | 235,892 |

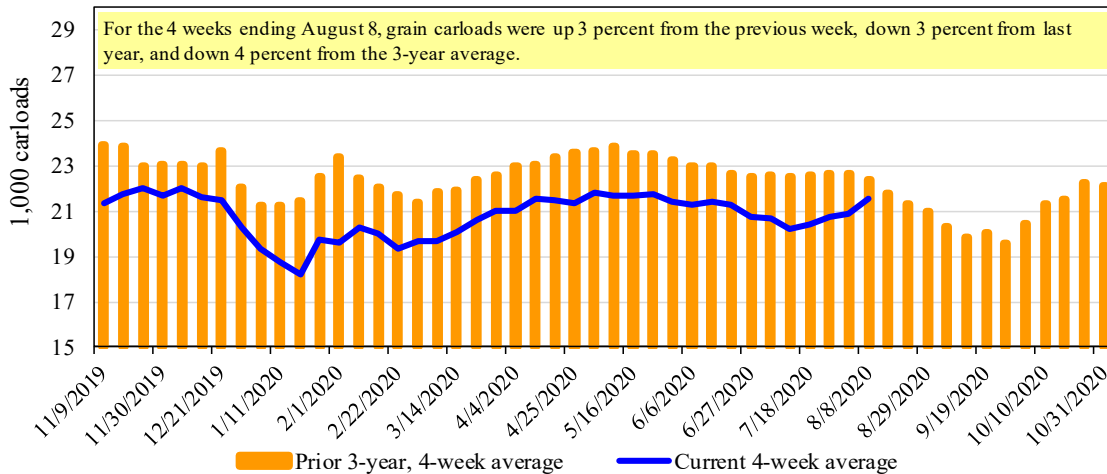
\*The past 4 weeks of this year as a percent of the same 4 weeks last year.

\*\*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<sup>1</sup> (\$/car)<sup>2</sup>**

| For the week ending:<br>8/13/2020 |                      | Delivery period |        |          |          |          |          |         |          |
|-----------------------------------|----------------------|-----------------|--------|----------|----------|----------|----------|---------|----------|
|                                   |                      | Aug-20          | Aug-19 | Sep-20   | Sep-19   | Oct-20   | Oct-19   | Nov-20  | Nov-19   |
| BNSF <sup>3</sup>                 | COT grain units      | no offer        | n/a    | 0        | 0        | 0        | no bid   | no bids | no bid   |
|                                   | COT grain single-car | no offer        | n/a    | 0        | 0        | 0        | 70       | 0       | 61       |
| UP <sup>4</sup>                   | GCAS/Region 1        | no offer        | n/a    | no offer | no offer | no offer | no offer | n/a     | no offer |
|                                   | GCAS/Region 2        | no offer        | n/a    | no offer | no bid   | no offer | no bid   | n/a     | no offer |

<sup>1</sup>Auction offerings are for single-car and unit train shipments only.

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

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

<sup>4</sup>UP - GCAS = Union Pacific Railroad Grain Car Allocation System.

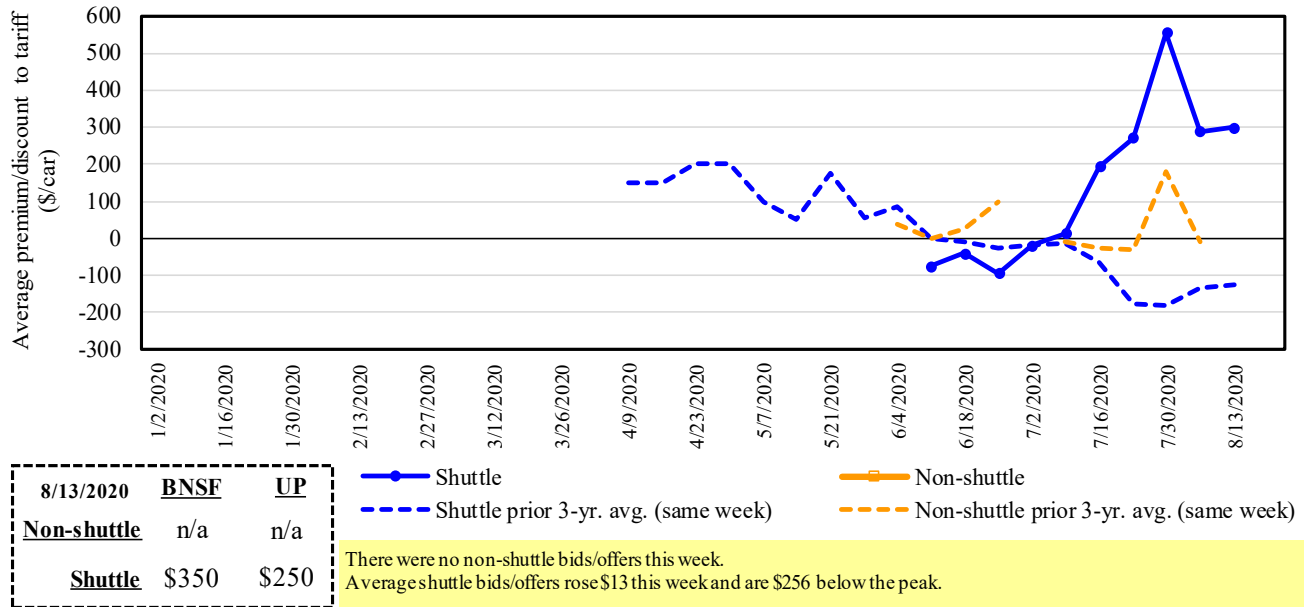
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

Source: USDA, Agricultural Marketing Service.

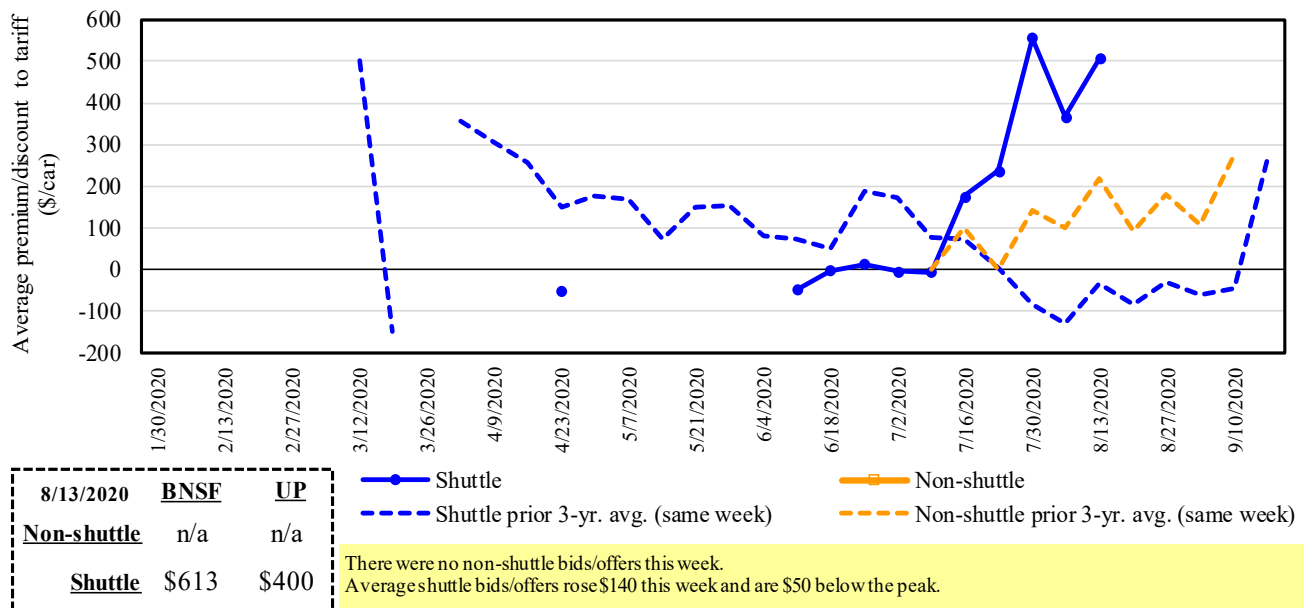
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

**Figure 4**  
**Bids/offers for railcars to be delivered in August 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.

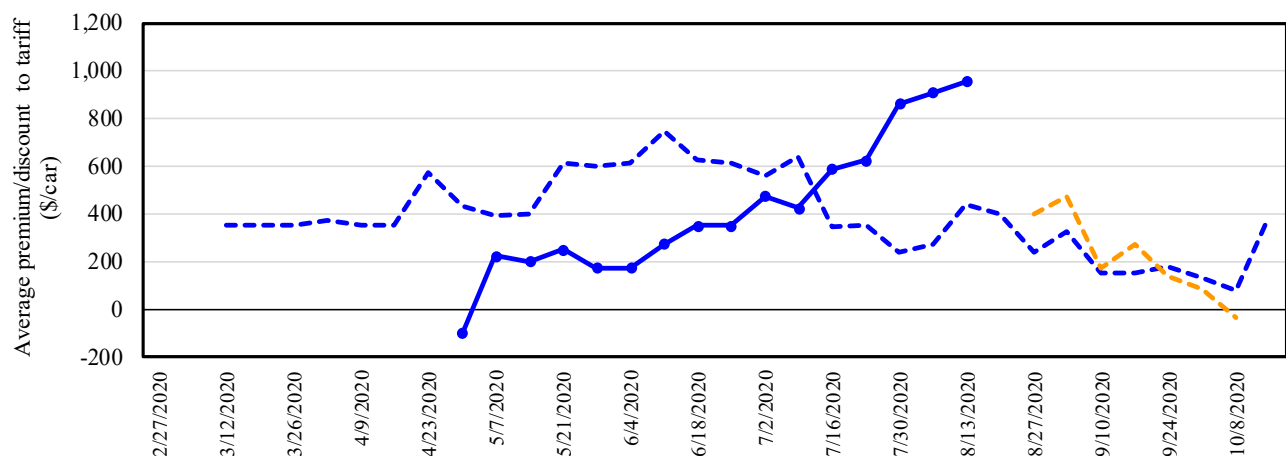
**Figure 5**  
**Bids/offers for railcars to be delivered in September 2020, secondary market**



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 October 2020, secondary market**



| 8/13/2020   |  | BNSF    | UP    |
|-------------|--|---------|-------|
| Non-shuttle |  | n/a     | n/a   |
| Shuttle     |  | \$1,063 | \$850 |

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)<sup>1</sup>**

| For the week ending: |                            | Delivery period |        |        |        |        |        |
|----------------------|----------------------------|-----------------|--------|--------|--------|--------|--------|
|                      |                            | Aug-20          | Sep-20 | Oct-20 | Nov-20 | Dec-20 | Jan-21 |
| Non-shuttle          | <b>BNSF-GF</b>             | 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    |
|                      | <b>UP-Pool</b>             | 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              | <b>BNSF-GF</b>             | 350             | 613    | 1063   | 1000   | 700    | n/a    |
|                      | Change from last week      | 50              | 155    | 80     | 500    | n/a    | n/a    |
|                      | Change from same week 2019 | n/a             | 763    | n/a    | n/a    | n/a    | n/a    |
|                      | <b>UP-Pool</b>             | 250             | 400    | 850    | 363    | 125    | n/a    |
|                      | Change from last week      | (25)            | 125    | 12     | 13     | 12     | n/a    |
|                      | Change from same week 2019 | n/a             | n/a    | n/a    | n/a    | n/a    | n/a    |

<sup>1</sup>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<sup>1</sup>**

| August 2020          | Origin region <sup>3</sup> | Destination region <sup>3</sup> | Tariff rate/car | Fuel surcharge per car | Tariff plus surcharge per: |                     | Percent change Y/Y <sup>4</sup> |
|----------------------|----------------------------|---------------------------------|-----------------|------------------------|----------------------------|---------------------|---------------------------------|
|                      |                            |                                 |                 |                        | metric ton                 | bushel <sup>2</sup> |                                 |
| <b>Unit train</b>    |                            |                                 |                 |                        |                            |                     |                                 |
| Wheat                | Wichita, KS                | St. Louis, MO                   | \$3,983         | \$35                   | \$39.90                    | \$1.09              | -2                              |
|                      | Grand Forks, ND            | Duluth-Superior, MN             | \$4,208         | \$0                    | \$41.79                    | \$1.14              | -3                              |
|                      | Wichita, KS                | Los Angeles, CA                 | \$7,115         | \$0                    | \$70.66                    | \$1.92              | -2                              |
|                      | Wichita, KS                | New Orleans, LA                 | \$4,525         | \$62                   | \$45.55                    | \$1.24              | -2                              |
|                      | Sioux Falls, SD            | Galveston-Houston, TX           | \$6,851         | \$0                    | \$68.03                    | \$1.85              | -2                              |
|                      | Colby, KS                  | Galveston-Houston, TX           | \$4,801         | \$68                   | \$48.35                    | \$1.32              | -3                              |
| Corn                 | Amarillo, TX               | Los Angeles, CA                 | \$5,121         | \$95                   | \$51.80                    | \$1.41              | -3                              |
|                      | Champaign-Urbana, IL       | New Orleans, LA                 | \$3,900         | \$70                   | \$39.43                    | \$1.00              | -1                              |
|                      | Toledo, OH                 | Raleigh, NC                     | \$6,816         | \$0                    | \$67.69                    | \$1.72              | 4                               |
|                      | Des Moines, IA             | Davenport, IA                   | \$2,415         | \$15                   | \$24.13                    | \$0.61              | 13                              |
|                      | 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         | \$44                   | \$38.17                    | \$0.97              | 2                               |
|                      | Des Moines, IA             | Los Angeles, CA                 | \$5,680         | \$128                  | \$57.67                    | \$1.46              | -1                              |
|                      | Minneapolis, MN            | New Orleans, LA                 | \$3,631         | \$30                   | \$36.35                    | \$0.99              | -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                         | \$70            | \$46.83                | \$1.27                     | -1                  |                                 |
| <b>Shuttle train</b> |                            |                                 |                 |                        |                            |                     |                                 |
| Wheat                | Great Falls, MT            | Portland, OR                    | \$4,018         | \$0                    | \$39.90                    | \$1.09              | -3                              |
|                      | Wichita, KS                | Galveston-Houston, TX           | \$4,236         | \$0                    | \$42.07                    | \$1.14              | -3                              |
|                      | Chicago, IL                | Albany, NY                      | \$7,074         | \$0                    | \$70.25                    | \$1.91              | 20                              |
|                      | Grand Forks, ND            | Portland, OR                    | \$5,676         | \$0                    | \$56.37                    | \$1.53              | -2                              |
|                      | Grand Forks, ND            | Galveston-Houston, TX           | \$5,996         | \$0                    | \$59.54                    | \$1.62              | -2                              |
|                      | Colby, KS                  | Portland, OR                    | \$6,012         | \$112                  | \$60.81                    | \$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         | \$70                   | \$38.63                    | \$0.98              | -1                              |
|                      | Lincoln, NE                | Galveston-Houston, TX           | \$3,880         | \$0                    | \$38.53                    | \$0.98              | 0                               |
|                      | Des Moines, IA             | Amarillo, TX                    | \$4,220         | \$55                   | \$42.45                    | \$1.08              | 1                               |
|                      | Minneapolis, MN            | Tacoma, WA                      | \$5,180         | \$0                    | \$51.44                    | \$1.31              | 0                               |
| Soybeans             | 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         | \$81                   | \$49.22                    | \$1.34              | -1                              |
|                      | Toledo, OH                 | Huntsville, AL                  | \$4,805         | \$0                    | \$47.72                    | \$1.30              | 4                               |
| Grand Island, NE     | Portland, OR               | \$5,260                         | \$115           | \$53.37                | \$1.45                     | -11                 |                                 |

<sup>1</sup>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.

<sup>2</sup>Approximate load per car = 111 short tons (100.7 metric tons): corn 56 pounds per bushel (lbs/bu), wheat and soybeans 60 lbs/bu.

<sup>3</sup>Regional economic areas are defined by the Bureau of Economic Analysis (BEA).

<sup>4</sup>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: August 2020 |                 |                      | Tariff rate<br>per car <sup>1</sup> | Fuel<br>surcharge<br>per car <sup>2</sup> | Tariff rate plus<br>fuel surcharge per: |                     | Percent<br>change <sup>4</sup><br>Y/Y |
|-------------------|-----------------|----------------------|-------------------------------------|---|---|---------------------|---------------------------------------|
| Commodity         | Origin<br>state | Destination region   |                                     |   | metric ton <sup>3</sup>                 | bushel <sup>3</sup> |                                       |
| Wheat             | MT              | Chihuahua, CI        | \$7,384                             | \$0                                       | \$75.45                                 | \$2.05              | -2                                    |
|                   | OK              | Cuautitlan, EM       | \$6,713                             | \$49                                      | \$69.08                                 | \$1.88              | -2                                    |
|                   | KS              | Guadalajara, JA      | \$7,471                             | \$474                                     | \$81.18                                 | \$2.21              | -2                                    |
|                   | TX              | Salinas Victoria, NL | \$4,329                             | \$28                                      | \$44.52                                 | \$1.21              | -1                                    |
| Corn              | IA              | Guadalajara, JA      | \$8,902                             | \$376                                     | \$94.80                                 | \$2.41              | -1                                    |
|                   | SD              | Celaya, GJ           | \$8,140                             | \$0                                       | \$83.17                                 | \$2.11              | 0                                     |
|                   | NE              | Queretaro, QA        | \$8,278                             | \$92                                      | \$85.53                                 | \$2.17              | -1                                    |
|                   | SD              | Salinas Victoria, NL | \$6,905                             | \$0                                       | \$70.55                                 | \$1.79              | 0                                     |
|                   | MO              | Tlahpantla, EM       | \$7,643                             | \$89                                      | \$79.01                                 | \$2.00              | -2                                    |
|                   | SD              | Torreón, CU          | \$7,690                             | \$0                                       | \$78.57                                 | \$1.99              | 0                                     |
| Soybeans          | MO              | Bojay (Tula), HG     | \$8,547                             | \$354                                     | \$90.94                                 | \$2.47              | -1                                    |
|                   | NE              | Guadalajara, JA      | \$9,172                             | \$362                                     | \$97.41                                 | \$2.65              | -1                                    |
|                   | IA              | El Castillo, JA      | \$9,490                             | \$0                                       | \$96.97                                 | \$2.64              | 1                                     |
|                   | KS              | Torreón, CU          | \$7,964                             | \$238                                     | \$83.80                                 | \$2.28              | -1                                    |
| Sorghum           | NE              | Celaya, GJ           | \$7,772                             | \$323                                     | \$82.71                                 | \$2.10              | -2                                    |
|                   | KS              | Queretaro, QA        | \$8,108                             | \$61                                      | \$83.46                                 | \$2.12              | 0                                     |
|                   | NE              | Salinas Victoria, NL | \$6,713                             | \$49                                      | \$69.09                                 | \$1.75              | 0                                     |
|                   | NE              | Torreón, CU          | \$7,092                             | \$210                                     | \$74.61                                 | \$1.89              | -3                                    |

<sup>1</sup>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.

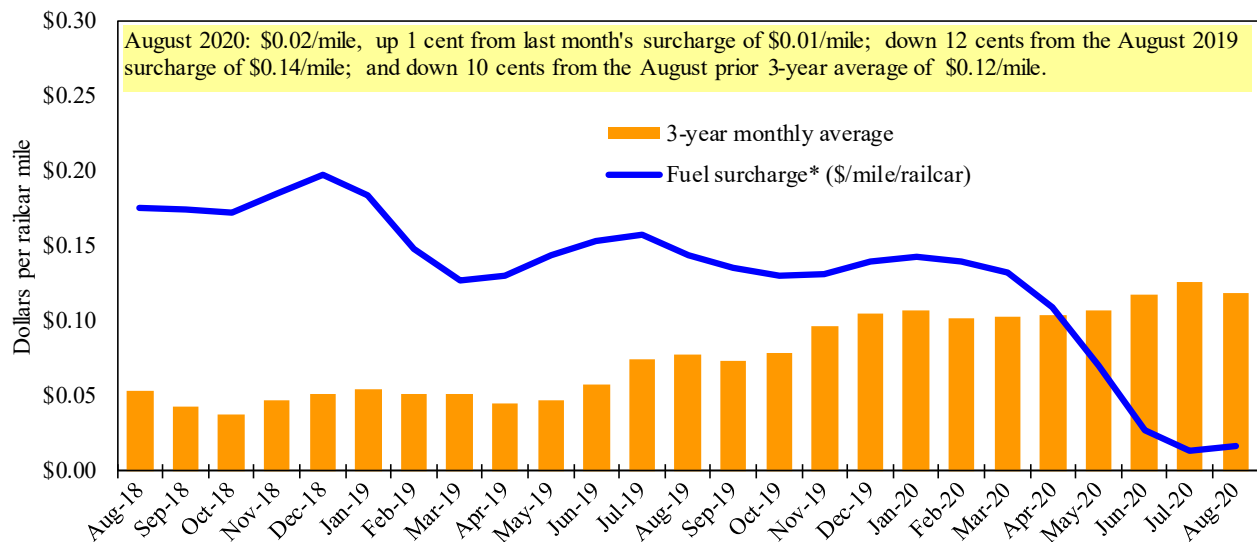
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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

<sup>4</sup>Percentage 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 average<sup>1</sup>**

<sup>1</sup> 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.

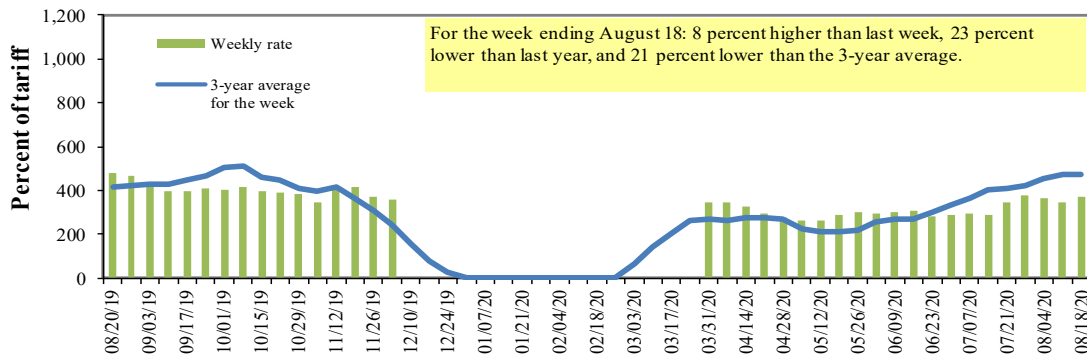
\*\*CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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<sup>1,2</sup>



<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>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 |
|--|--------------------------|-------------|-----------------|----------------------|-----------|------------|------------|---------------|
| <b>Rate<sup>1</sup></b>                          | 8/18/2020                | 431         | 370             | -                    | 244       | 308        | 308        | 231           |
|  | 8/11/2020                | 422         | 344             | -                    | 233       | 294        | 294        | 221           |
| <b>\$/ton</b>                                    | 8/18/2020                | 26.68       | 19.68           | -                    | 9.74      | 14.45      | 12.44      | 7.25          |
|  | 8/11/2020                | 26.12       | 18.30           | -                    | 9.30      | 13.79      | 11.88      | 6.94          |
| <b>Current week % change from the same week:</b> |                          |             |                 |                      |           |            |            |               |
|  | Last year                | -12         | -23             | -                    | -27       | -13        | -13        | -38           |
|  | 3-year avg. <sup>2</sup> | -12         | -21             | -                    | -27       | -8         | -8         | -24           |
| <b>Rate<sup>1</sup></b>                          | September                | 470         | 430             | -                    | 345       | 435        | 435        | 364           |
|  | November                 | 475         | 410             | 404                  | 276       | 369        | 369        | 256           |

<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>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

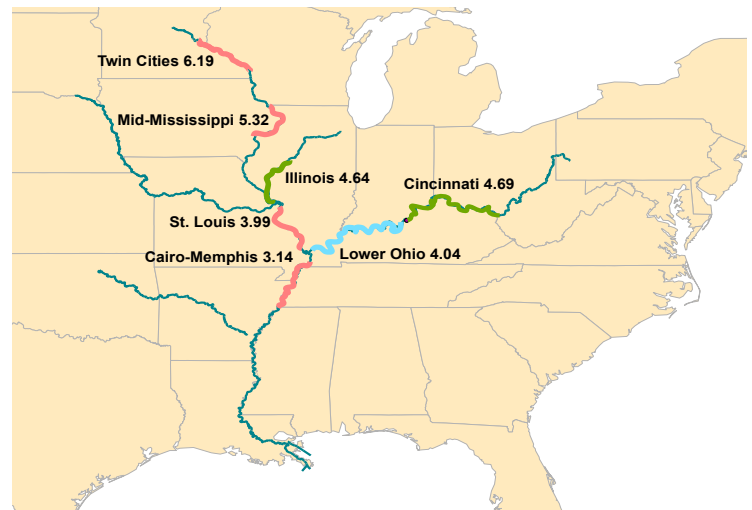
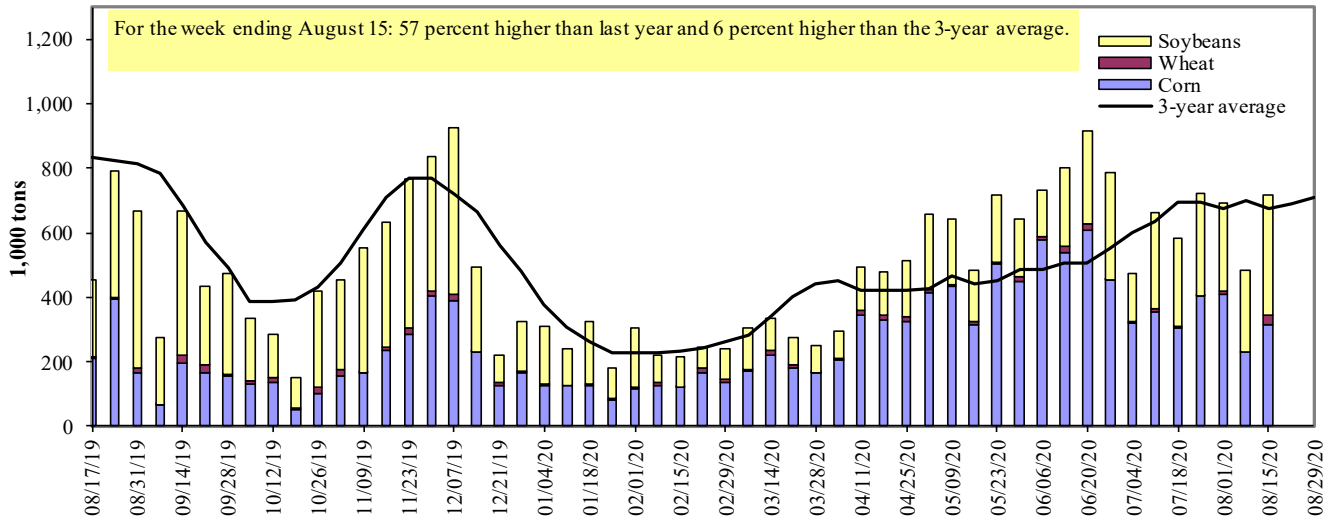


Figure 10

**Barge movements on the Mississippi River<sup>1</sup> (Locks 27 - Granite City, IL)**



<sup>1</sup> 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 08/15/2020         | Corn   | Wheat | Soybeans | Other | Total  |
|--|--------|-------|----------|-------|--------|
| <b>Mississippi River</b>               |        |       |          |       |        |
| Rock Island, IL (L15)                  | 262    | 6     | 280      | 0     | 548    |
| Winfield, MO (L25)                     | 288    | 27    | 358      | 5     | 678    |
| Alton, IL (L26)                        | 282    | 25    | 362      | 5     | 673    |
| Granite City, IL (L27)                 | 317    | 27    | 371      | 5     | 719    |
| <b>Illinois River (La Grange)</b>      | 0      | 0     | 0        | 0     | 0      |
| <b>Ohio River (Olmsted)</b>            | 36     | 28    | 87       | 0     | 151    |
| <b>Arkansas River (L1)</b>             | 0      | 32    | 20       | 0     | 52     |
| Weekly total - 2020                    | 352    | 88    | 478      | 5     | 922    |
| Weekly total - 2019                    | 213    | 24    | 305      | 5     | 547    |
| 2020 YTD <sup>1</sup>                  | 12,088 | 1,313 | 8,436    | 107   | 21,944 |
| 2019 YTD <sup>1</sup>                  | 8,111  | 1,141 | 6,949    | 106   | 16,308 |
| 2020 as % of 2019 YTD                  | 149    | 115   | 121      | 101   | 135    |
| Last 4 weeks as % of 2019 <sup>2</sup> | 136    | 265   | 114      | 33    | 127    |
| Total 2019                             | 12,780 | 1,631 | 14,683   | 154   | 29,247 |

<sup>1</sup> 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.

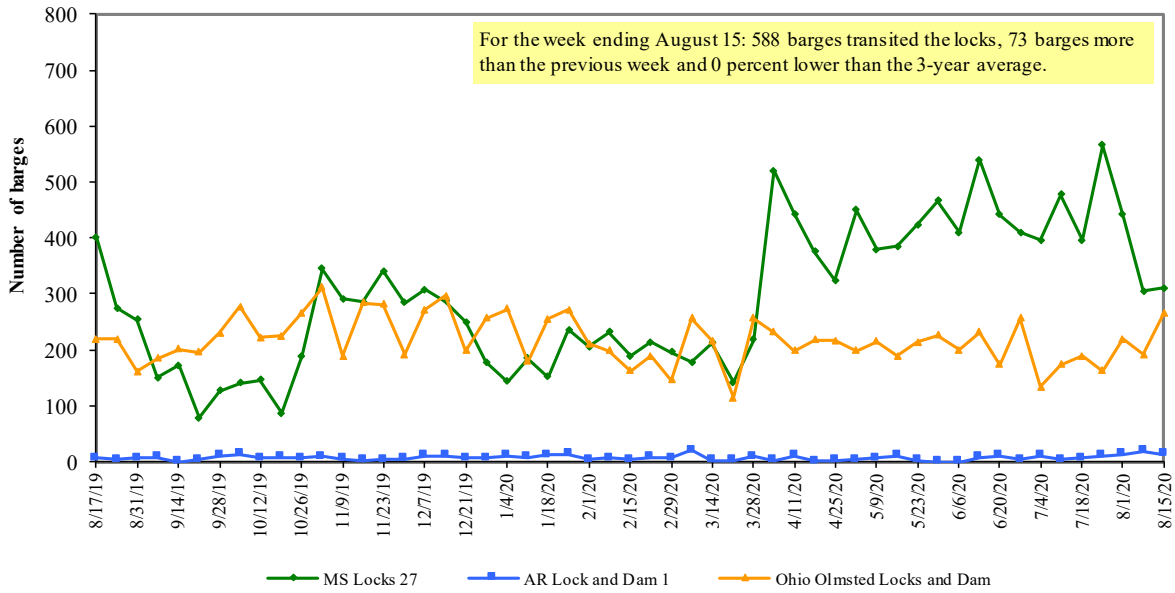
<sup>2</sup> As a percent of same period in 2019.

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

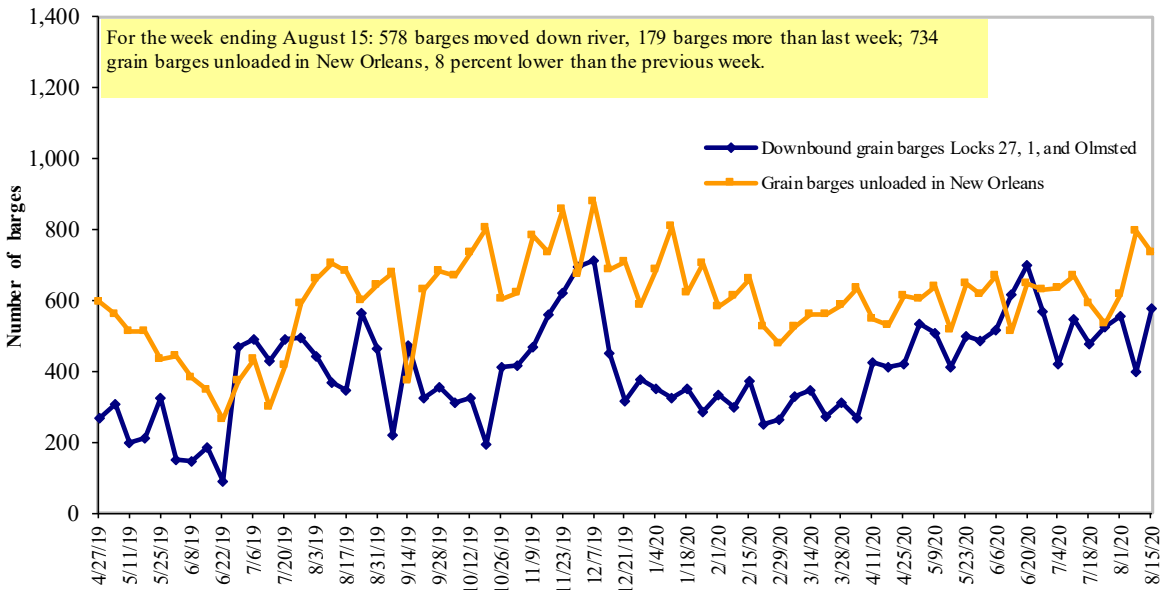
**Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam**



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 8/17/2020 (U.S. \$/gallon)**

| Region | Location                   | Price | Change from |          |
|--------|----------------------------|-------|-------------|----------|
|        |                            |       | Week ago    | Year ago |
| I      | East Coast                 | 2.508 | -0.006      | -0.511   |
|        | New England                | 2.627 | -0.006      | -0.421   |
|        | Central Atlantic           | 2.684 | -0.008      | -0.515   |
|        | Lower Atlantic             | 2.365 | -0.005      | -0.527   |
| II     | Midwest                    | 2.308 | 0.003       | -0.592   |
| III    | Gulf Coast                 | 2.177 | -0.006      | -0.574   |
| IV     | Rocky Mountain             | 2.365 | -0.004      | -0.574   |
| V      | West Coast                 | 2.958 | 0.003       | -0.606   |
|        | West Coast less California | 2.586 | -0.002      | -0.572   |
|        | California                 | 3.264 | 0.008       | -0.623   |
| Total  | United States              | 2.427 | -0.001      | -0.567   |

<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

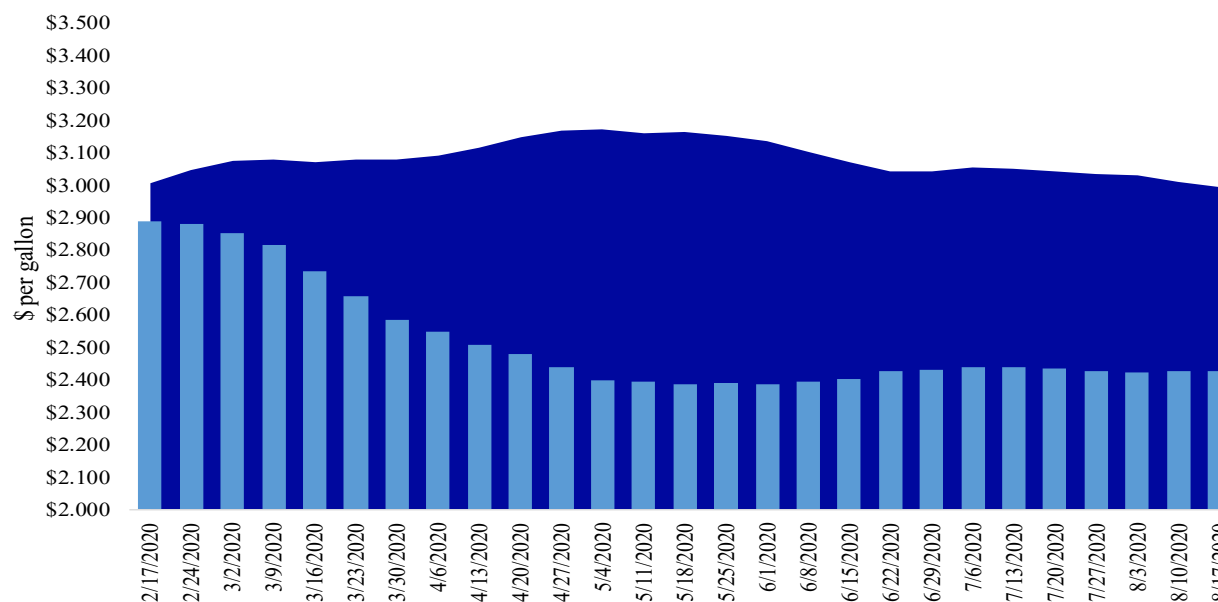
Source: U.S. Department of Energy, Energy Information Administration.

Figure 13

**Weekly diesel fuel prices, U.S. average**

For the week ending August 17, the U.S. average diesel fuel price decreased 0.1 cents from the previous week to \$2.427 per gallon, 56.7 cents below the same week last year.

■ Last year    ■ Current year  
\$2.994        \$2.427



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 |       |       |       |     | All wheat | Corn   | Soybeans | Total   |
|--|-------|-------|-------|-------|-----|-----------|--------|----------|---------|
|  | HRW   | SRW   | HRS   | SWW   | DUR |           |        |          |         |
| <b>Export balances<sup>1</sup></b>                   |       |       |       |       |     |           |        |          |         |
| 8/6/2020   | 1,558 | 678   | 1,853 | 1,318 | 187 | 5,595     | 4,138  | 6,446    | 16,179  |
| This week year ago                                   | 1,407 | 696   | 1,579 | 1,011 | 334 | 5,027     | 2,593  | 5,648    | 13,268  |
| <b>Cumulative exports-marketing year<sup>2</sup></b> |       |       |       |       |     |           |        |          |         |
| 2019/20 YTD  | 2,263 | 351   | 1,325 | 848   | 209 | 4,996     | 40,022 | 41,065   | 86,083  |
| 2018/19 YTD  | 2,386 | 536   | 1,040 | 748   | 91  | 4,800     | 47,391 | 42,944   | 95,135  |
| YTD 2019/20 as % of 2018/19                          | 95    | 66    | 127   | 113   | 231 | 104       | 84     | 96       | 90      |
| Last 4 wks. as % of same period 2018/19*             | 119   | 98    | 115   | 123   | 59  | 112       | 208    | 127      | 137     |
| 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 |

<sup>1</sup> Current unshipped (outstanding) export sales to date.

<sup>2</sup> 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<sup>1</sup> of U.S. corn

| For the week ending 08/06/2020                              | Total commitments <sup>2</sup> |                       |                     | % change<br>current MY<br>from last MY | Exports <sup>3</sup><br>3-yr. avg.<br>2016-18 |
|---|--------------------------------|-----------------------|---------------------|--|---|
|   | 2020/21<br>next MY             | 2019/20<br>current MY | 2018/19<br>last MY* |  |   |
|   |                                | - 1,000 mt -          |                     |  |   |
| Mexico  | 2,573                          | 14,423                | 15,598              | (8)                                    | 14,659  |
| Japan   | 804                            | 9,904                 | 12,807              | (23)                                   | 11,955  |
| Korea   | 0                              | 2,693                 | 3,698               | (27)                                   | 4,977   |
| Colombia  | 351                            | 4,750                 | 4,680               | 1                                      | 4,692   |
| Peru  | 90                             | 562                   | 1,992               | (72)                                   | 2,808   |
| <b>Top 5 importers</b>                                      | <b>3,817</b>                   | <b>32,331</b>         | <b>38,774</b>       | <b>(17)</b>                            | <b>39,091</b>                                 |
| <b>Total U.S. corn export sales</b>                         | <b>11,480</b>                  | <b>44,160</b>         | <b>49,984</b>       | <b>(12)</b>                            | <b>54,024</b>                                 |
| % of projected exports                                      | 20%                            | 97%                   | 95%                 |  |   |
| Change from prior week <sup>2</sup>                         | <b>553</b>                     | <b>377</b>            | <b>56</b>           |  |   |
| <b>Top 5 importers' share of U.S. corn<br/>export sales</b> | 33%                            | 73%                   | 78%                 |  | 72%   |
| <b>USDA forecast August 2020</b>                            | <b>56,616</b>                  | <b>45,674</b>         | <b>52,570</b>       | <b>(13)</b>                            |   |
| <b>Corn use for ethanol USDA forecast,<br/>August 2020</b>  | <b>132,080</b>                 | <b>123,190</b>        | <b>136,601</b>      | <b>(10)</b>                            |   |

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

<sup>2</sup>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.

<sup>3</sup>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<sup>1</sup> of U.S. soybeans**

| For the week ending 8/06/2020                                  | Total commitments <sup>2</sup> |                       |                     | % change<br>current MY<br>from last MY | Exports <sup>3</sup><br>3-yr. avg.<br>2016-18 |
|--|--------------------------------|-----------------------|---------------------|--|---|
|  | 2020/21<br>next MY             | 2019/20<br>current MY | 2018/19<br>last MY* |  |   |
|  |                                | - 1,000 mt -          |                     |  | - 1,000 mt -                                  |
| China  | 10,270                         | 16,856                | 14,064              | 20                                     | 25,733  |
| Mexico   | 1,161                          | 4,729                 | 4,952               | (5)                                    | 4,271   |
| Indonesia  | 40                             | 2,296                 | 2,365               | (3)                                    | 2,386   |
| Japan  | 160                            | 2,466                 | 2,631               | (6)                                    | 2,243   |
| Egypt  | 150                            | 3,857                 | 2,700               | 43                                     | 1,983   |
| <b>Top 5 importers</b>   | <b>11,781</b>                  | <b>30,204</b>         | <b>26,712</b>       | <b>13</b>                              | <b>36,616</b>                                 |
| <b>Total U.S. soybean export sales</b>                         | <b>17,976</b>                  | <b>47,511</b>         | <b>48,592</b>       | <b>(2)</b>                             | <b>53,746</b>                                 |
| % of projected exports   | 31%                            | 106%                  | 102%                |  |   |
| change from prior week <sup>2</sup>                            | <b>2,839</b>                   | <b>570</b>            | <b>(178)</b>        |  |   |
| <b>Top 5 importers' share of U.S.<br/>soybean export sales</b> | <b>66%</b>                     | <b>64%</b>            | <b>55%</b>          |  | <b>68%</b>                                    |
| <b>USDA forecast, August 2020</b>                              | <b>57,902</b>                  | <b>44,959</b>         | <b>47,738</b>       | <b>94</b>                              |   |

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

<sup>2</sup>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.

<sup>3</sup>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<sup>1</sup> of all U.S. wheat**

| For the week ending 8/06/2020                                 | commitments <sup>2</sup> |                    | % change<br>current MY<br>from last MY | Exports <sup>3</sup><br>3-yr. avg.<br>2017-19 |
|---|--------------------------|--------------------|--|---|
|   | 2020/21<br>current MY    | 2019/20<br>last MY |  |   |
|   |                          | - 1,000 mt -       |  | - 1,000 mt -                                  |
| Mexico  | 1,006                    | 1,361              | (26)                                   | 3,213   |
| Philippines   | 1,413                    | 1,215              | 16                                     | 2,888   |
| Japan   | 1,017                    | 1,005              | 1                                      | 2,655   |
| Nigeria   | 535                      | 625                | (14)                                   | 1,433   |
| Korea   | 703                      | 522                | 35                                     | 1,372   |
| Indonesia   | 347                      | 306                | 14                                     | 1,195   |
| Taiwan  | 467                      | 455                | 3                                      | 1,175   |
| Thailand  | 263                      | 311                | (16)                                   | 727   |
| Italy   | 339                      | 294                | 15                                     | 622   |
| Colombia  | 156                      | 340                | (54)                                   | 618   |
| <b>Top 10 importers</b>                                       | <b>6,245</b>             | <b>6,434</b>       | <b>(3)</b>                             | <b>15,897</b>                                 |
| <b>Total U.S. wheat export sales</b>                          | <b>10,591</b>            | <b>9,827</b>       | <b>8</b>                               | <b>23,821</b>                                 |
| % of projected exports  | 40%                      | 37%                |  |   |
| change from prior week <sup>2</sup>                           | <b>368</b>               | <b>462</b>         |  |   |
| <b>Top 10 importers' share of<br/>U.S. wheat export sales</b> | <b>59%</b>               | <b>65%</b>         |  | <b>67%</b>                                    |
| <b>USDA forecast, August 2020</b>                             | <b>26,567</b>            | <b>26,294</b>      | <b>1</b>                               |   |

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

<sup>2</sup>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.

<sup>3</sup>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<br>08/13/20 | Previous<br>week* | Current week<br>as % of previous | 2020 YTD*     | 2019 YTD*     | 2020 YTD as<br>% of 2019 YTD | Last 4-weeks as % of: |                  | 2019 total*    |
|-------------------------------|---------------------------------|-------------------|----------------------------------|---------------|---------------|------------------------------|-----------------------|------------------|----------------|
|                               |                                 |                   |                                  |               |               |                              | Last year             | Prior 3-yr. avg. |                |
| <b>Pacific Northwest</b>      |                                 |                   |                                  |               |               |                              |                       |                  |                |
| Wheat                         | 370                             | 290               | 128                              | 10,032        | 8,601         | 117                          | 118                   | 107              | 13,961         |
| Corn                          | 220                             | 241               | 91                               | 6,887         | 6,858         | 100                          | 811                   | 100              | 7,047          |
| Soybeans                      | 90                              | 18                | 502                              | 2,867         | 6,419         | 45                           | 10                    | 20               | 11,969         |
| <b>Total</b>                  | <b>681</b>                      | <b>549</b>        | <b>124</b>                       | <b>19,786</b> | <b>21,878</b> | <b>90</b>                    | <b>103</b>            | <b>87</b>        | <b>32,977</b>  |
| <b>Mississippi Gulf</b>       |                                 |                   |                                  |               |               |                              |                       |                  |                |
| Wheat                         | 8                               | 61                | 13                               | 2,399         | 3,247         | 74                           | 69                    | 79               | 4,448          |
| Corn                          | 597                             | 818               | 73                               | 18,901        | 15,113        | 125                          | 126                   | 100              | 20,763         |
| Soybeans                      | 600                             | 573               | 105                              | 13,666        | 15,588        | 88                           | 76                    | 93               | 31,398         |
| <b>Total</b>                  | <b>1,205</b>                    | <b>1,452</b>      | <b>83</b>                        | <b>34,966</b> | <b>33,948</b> | <b>103</b>                   | <b>94</b>             | <b>95</b>        | <b>56,609</b>  |
| <b>Texas Gulf</b>             |                                 |                   |                                  |               |               |                              |                       |                  |                |
| Wheat                         | 37                              | 97                | 38                               | 2,844         | 4,626         | 61                           | 70                    | 93               | 6,009          |
| Corn                          | 28                              | 11                | 256                              | 497           | 458           | 109                          | 106                   | 81               | 640            |
| Soybeans                      | 0                               | 0                 | n/a                              | 7             | 2             | 413                          | 0                     | 0                | 2              |
| <b>Total</b>                  | <b>65</b>                       | <b>108</b>        | <b>60</b>                        | <b>3,347</b>  | <b>5,085</b>  | <b>66</b>                    | <b>75</b>             | <b>90</b>        | <b>6,650</b>   |
| <b>Interior</b>               |                                 |                   |                                  |               |               |                              |                       |                  |                |
| Wheat                         | 54                              | 29                | 187                              | 1,417         | 1,217         | 116                          | 83                    | 113              | 1,987          |
| Corn                          | 148                             | 197               | 75                               | 5,377         | 4,864         | 111                          | 105                   | 105              | 7,857          |
| Soybeans                      | 112                             | 167               | 67                               | 4,011         | 4,336         | 92                           | 88                    | 106              | 7,043          |
| <b>Total</b>                  | <b>314</b>                      | <b>393</b>        | <b>80</b>                        | <b>10,804</b> | <b>10,418</b> | <b>104</b>                   | <b>95</b>             | <b>107</b>       | <b>16,887</b>  |
| <b>Great Lakes</b>            |                                 |                   |                                  |               |               |                              |                       |                  |                |
| Wheat                         | 11                              | 23                | 47                               | 425           | 608           | 70                           | 84                    | 110              | 1,339          |
| Corn                          | 26                              | 0                 | n/a                              | 26            | 0             | n/a                          | n/a                   | 195              | 11             |
| Soybeans                      | 22                              | 31                | 70                               | 165           | 398           | 42                           | 101                   | 107              | 493            |
| <b>Total</b>                  | <b>58</b>                       | <b>54</b>         | <b>109</b>                       | <b>617</b>    | <b>1,006</b>  | <b>61</b>                    | <b>105</b>            | <b>114</b>       | <b>1,844</b>   |
| <b>Atlantic</b>               |                                 |                   |                                  |               |               |                              |                       |                  |                |
| Wheat                         | 6                               | 2                 | 254                              | 18            | 32            | 56                           | n/a                   | n/a              | 37             |
| Corn                          | 0                               | 0                 | n/a                              | 8             | 92            | 9                            | n/a                   | n/a              | 99             |
| Soybeans                      | 2                               | 38                | 5                                | 472           | 859           | 55                           | 64                    | 69               | 1,353          |
| <b>Total</b>                  | <b>8</b>                        | <b>40</b>         | <b>20</b>                        | <b>497</b>    | <b>982</b>    | <b>51</b>                    | <b>79</b>             | <b>84</b>        | <b>1,489</b>   |
| <b>U.S. total from ports*</b> |                                 |                   |                                  |               |               |                              |                       |                  |                |
| Wheat                         | 486                             | 502               | 97                               | 17,134        | 18,331        | 93                           | 96                    | 101              | 27,781         |
| Corn                          | 1,019                           | 1,266             | 80                               | 31,696        | 27,384        | 116                          | 152                   | 101              | 36,417         |
| Soybeans                      | 826                             | 827               | 100                              | 21,188        | 27,601        | 77                           | 63                    | 83               | 52,258         |
| <b>Total</b>                  | <b>2,331</b>                    | <b>2,595</b>      | <b>90</b>                        | <b>70,018</b> | <b>73,316</b> | <b>96</b>                    | <b>95</b>             | <b>94</b>        | <b>116,457</b> |

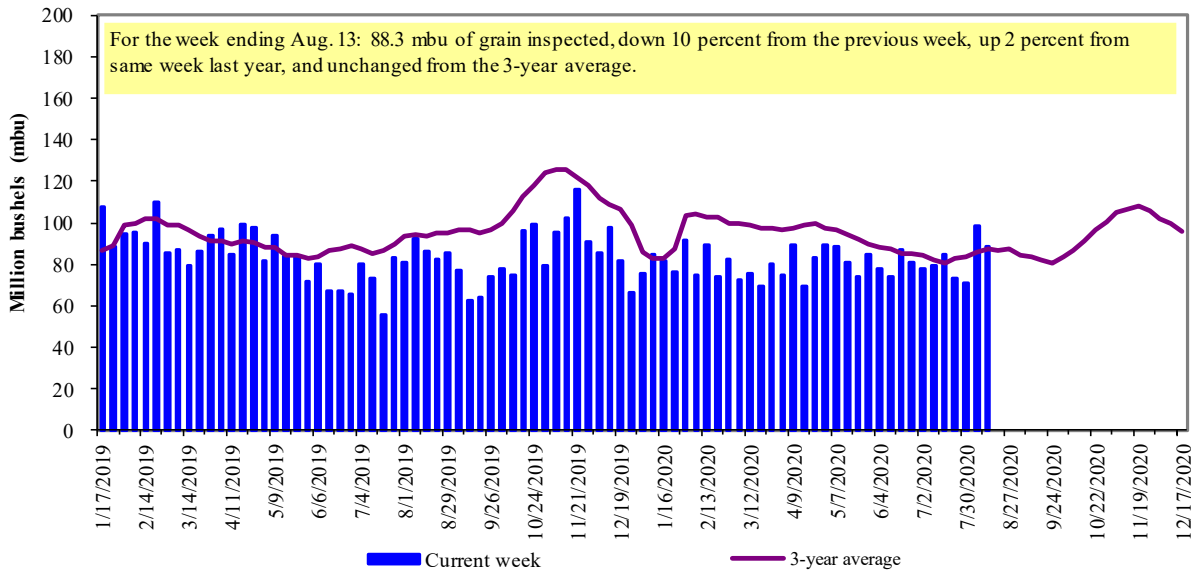
\*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)**

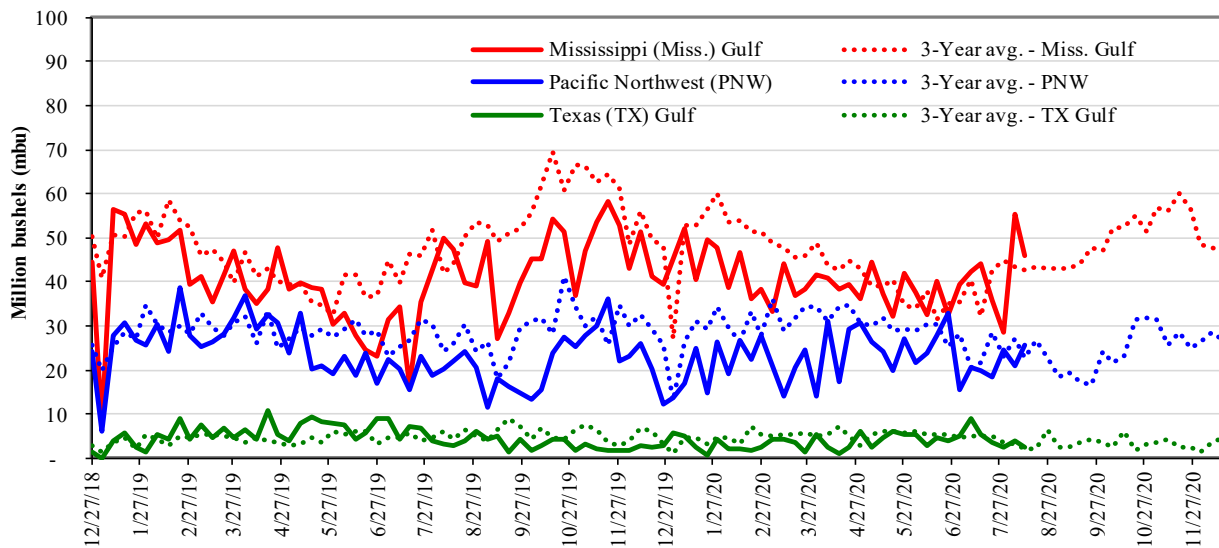


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

**U.S. Grain inspections: U.S. Gulf and PNW<sup>1</sup> (wheat, corn, and soybeans)**



| Week ending 08/13/20 inspections (mbu): |      | Percent change from:       |         |         |           |           |
|---|------|----------------------------|---------|---------|-----------|-----------|
|   |      | Last wk:                   | MS Gulf | TX Gulf | U.S. Gulf | PNW       |
| MS Gulf:                                | 45.8 | down 17                    | down 3  | down 39 | down 19   | up 23     |
| PNW:                                    | 25.6 | Last Year (same wk):       | down 3  | down 10 | down 4    | up 17     |
| TX Gulf:                                | 2.4  | 3-yr avg.(4-wk. mov. Avg): | up 5    | down 30 | up 3      | unchanged |

Source: USDA, Federal Grain Inspection Service.

# Ocean Transportation

Table 17

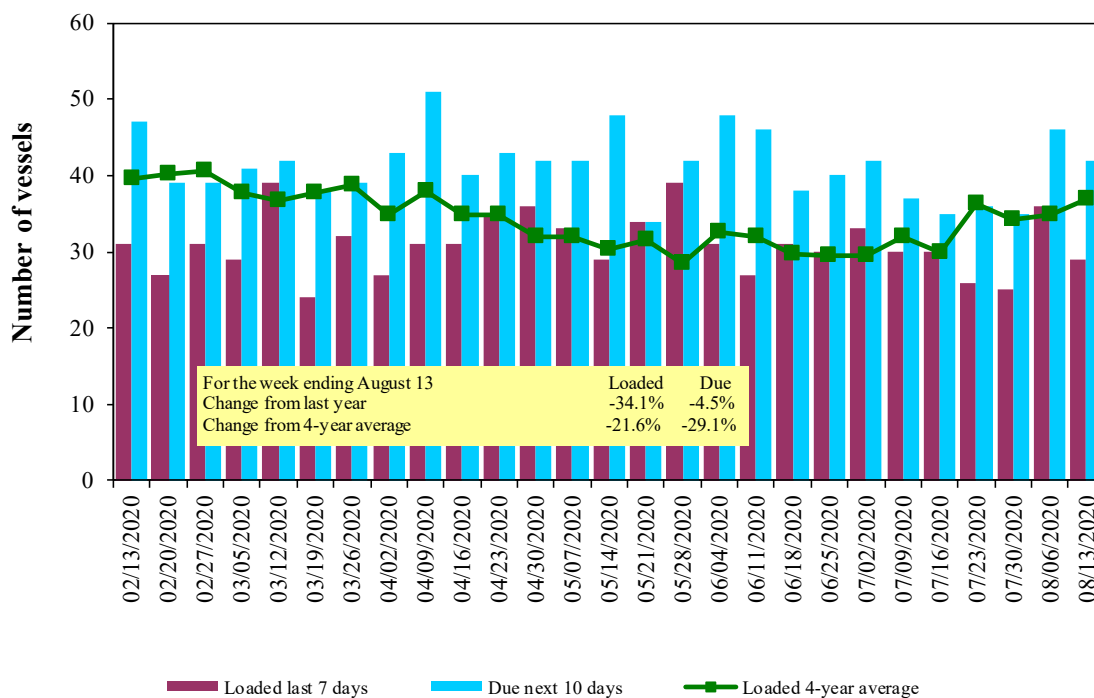
**Weekly port region grain ocean vessel activity (number of vessels)**

| Date         | Gulf      |               |                  | Pacific Northwest |
|--------------|-----------|---------------|------------------|-------------------|
|              | In port   | Loaded 7-days | Due next 10-days | In port           |
| 8/13/2020    | 27        | 29            | 42               | 10                |
| 8/6/2020     | 23        | 36            | 46               | 14                |
| 2019 range   | (26...61) | (18...44)     | (33...69)        | (8...33)          |
| 2019 average | 40        | 31            | 49               | 17                |

Source: USDA, Agricultural Marketing Service.

Figure 16

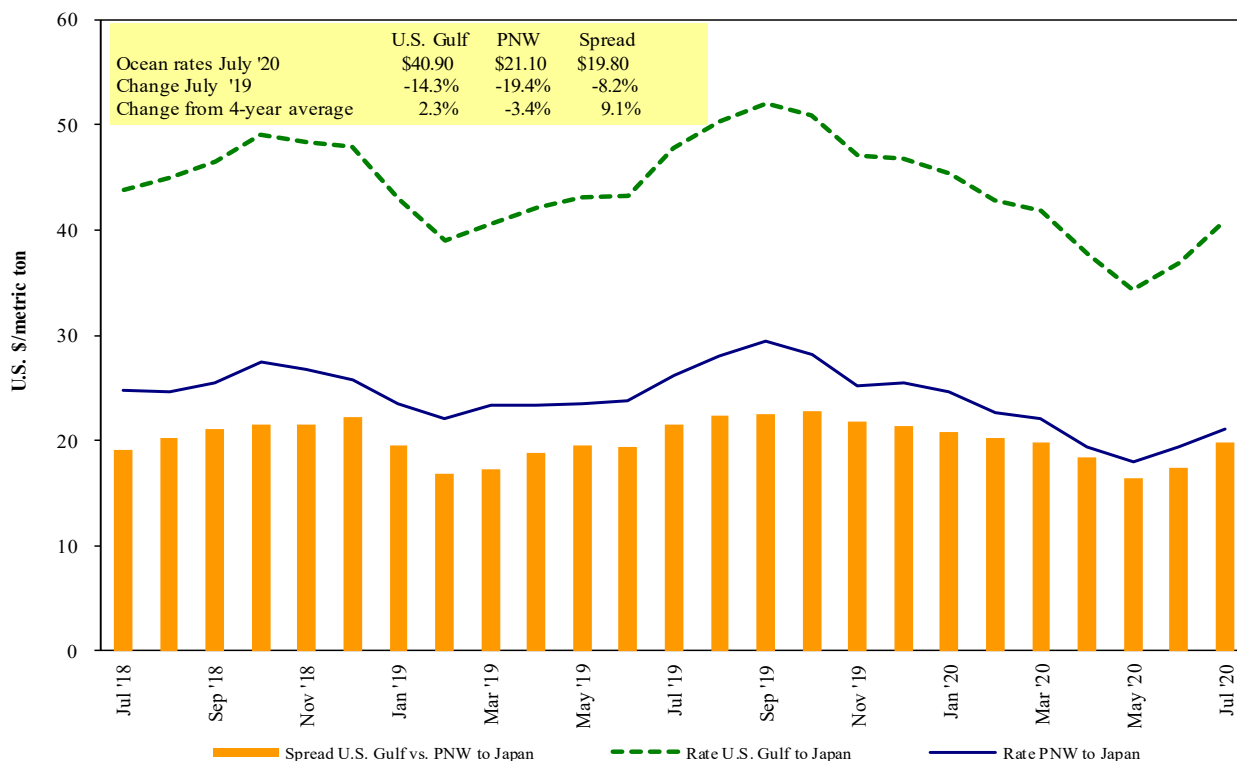
**U.S. Gulf<sup>1</sup> vessel loading activity**



<sup>1</sup>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 08/15/2020

| Export region | Import region | Grain types | Loading date | Volume loads (metric tons) | Freight rate (US\$/metric ton) |
|---------------|---------------|-------------|--------------|----------------------------|--------------------------------|
| U.S. Gulf     | China         | Heavy grain | Aug 18/24    | 66,000                     | 39.50                          |
| U.S. Gulf     | Mozambique    | Sorghum     | Aug 10/20    | 30,780                     | 41.35                          |
| U.S. Gulf     | Mombasa       | Wheat       | Jul 23/Aug 3 | 1,200                      | 117.97*                        |
| U.S. Gulf     | Pt Sudan      | Sorghum     | Jun 5/15     | 33,370                     | 99.50                          |
| PNW           | China         | Soybeans    | Sep 1/30     | 63,000                     | 22.10 op 22.60                 |
| PNW           | Yemen         | Wheat       | Aug 4/14     | 15,000                     | 42.95*                         |
| 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*                         |
| Vancouver     | Japan         | Wheat       | Sep 15/30    | 20,000                     | 24.30                          |
| Vancouver     | Japan         | Canola      | Sep 15/30    | 30,000                     | 24.30                          |
| Brazil        | Pakistan      | Heavy grain | Jul 20/30    | 70,000                     | 21.85                          |
| Brazil        | China         | Heavy grain | Jun 25/30    | 65,000                     | 23.50                          |
| Brazil        | Japan         | Corn        | Sep 11/20    | 49,000                     | 34.75                          |
| Brazil        | Japan         | Corn        | Sep 1/10     | 60,000                     | 34.00                          |
| Brazil        | SE Asia       | Corn        | Jul 1/6      | 66,000                     | 22.75                          |
| 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.

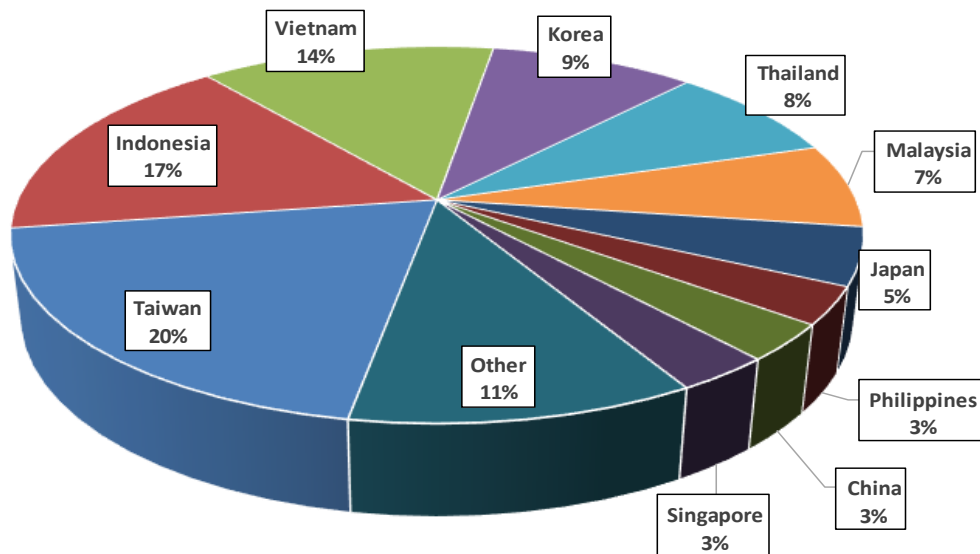
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

op = option.

Source: Maritime Research, Inc.

In 2019, containers were used to transport 9 percent of total U.S. waterborne grain exports. Approximately 60 percent of U.S. waterborne grain exports in 2019 went to Asia, of which 14 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

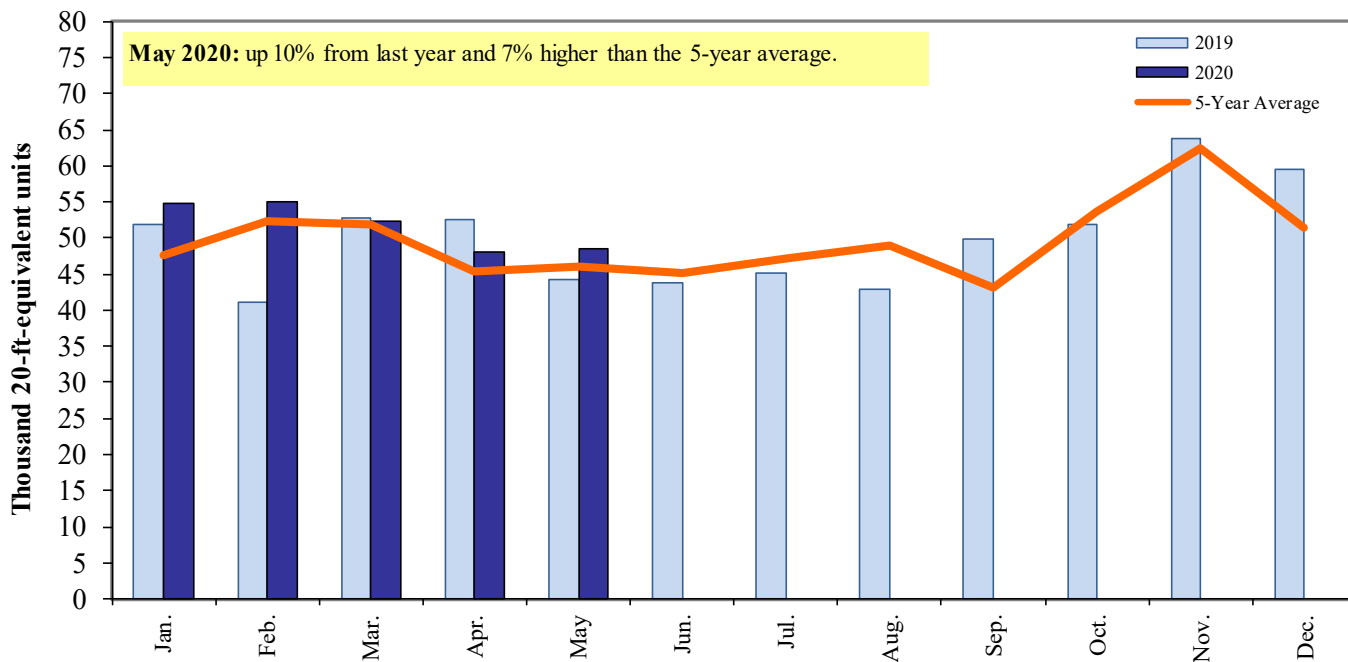
**Figure 18**  
**Top 10 destination markets for U.S. containerized grain exports, Jan-May 2020**



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, 120810, and 120190.

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, 120190, 120810, 230210, 230310, 230330, and 230990.

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

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