USDA United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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Contents

The next release is November 19, 2020

WEEKLY HIGHLIGHTS

Export Sales Reach Historic Highs

For the week ending October 29, outstanding (unshipped) export sales of corn, wheat, and soybeans reached 64 million metric tons (mmt)—an historical record, up 2 percent from last week and almost triple the same time last year. The increase in export sales was driven mainly by increased exports of corn and soybeans to China. Also, during the last four weeks, unshipped export sales averaged about 63 mmt, 160 percent above last year. Total commitments of corn to China reached 10.8 mmt, compared to just 0.06 mmt last year and the 3-year average of 0.3 mmt. Total soybean commitments reached 26.8 mmt, more than triple (7.1 mmt) the same time last year and 28 percent higher than the 3-year average.

ATRI Releases Top Trucking Industry Issues Report

The American Transportation Research Institute (ATRI) recently released its 16th Top Industry Issues report. Truck drivers, motor carriers, and other stakeholders were among the 3,222 respondents surveyed about issues facing the trucking industry. Driver shortage was the top issue of concern for the 4th consecutive year, followed by truck parking, driver compensation and retention, and (for the first time since 2005) insurance costs. Tort reform was also in the survey's top 10 concerns for the first time since 2011.

FMCSA Requests Comments on Project To Collect Opinions on ADS Technologies

On November 3, the Federal Motor Carrier Safety Administration (FMCSA) requested comments on a proposed project to collect baseline opinions of automated driving systems (ADS) before and after hands-on demonstrations with ADS technologies. The *Trucking Fleet Concept of Operations (CONOPS) for Managing Mixed Fleet* will survey approximately 2,000 people, including commercial motor vehicle (CMV) fleet managers, CMV sales personnel, State and Federal government personnel, industry engineers, researchers, and CMV drivers. The deadline for submitting comments is January 4, 2021.

Port of Brownsville Receives $14.5 Million Grant

Through its Port Infrastructure Development Program, the U.S. Department of Transportation's Maritime Administration awarded a $14.5 million infrastructure grant to the Port of Brownsville to expand and upgrade its 3-million-bushel grain elevator, including rail and road improvements. A deep-water seaport on the U.S.-Mexico border in Brownsville, TX, the Port of Brownsville provides a major trade channel between the U.S. and Mexico. The improvements are expected to offer all grain producers from the Rio Grande Valley and other parts of Texas and the United States a new, cost-efficient option to export goods around the world.

Snapshots by Sector

Export Sales

For the week ending October 29, **unshipped balances** of wheat, corn, and soybeans totaled 64.0 million metric tons (mmt). This surpassed last week's previous record high for outstanding sales. Net **corn export sales** were 2.611 mmt, up 16 percent from the past week. Net **soybean export sales** were 1.531 mmt, down 6 percent from the previous week. Net weekly **wheat export sales** were 0.597 mmt, down 20 percent from the previous week.

Rail

U.S. Class I railroads originated 27,002 **grain carloads** during the week ending October 31. This was a 4-percent increase from the previous week, 24 percent more than last year, and 25 percent more than the 3-year average.

Average November shuttle **secondary railcar** bids/offers (per car) were $365 above tariff for the week ending November 5. This was $123 less than last week and $296 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending November 7, **barge grain movements** totaled 925,624 tons. This was 4 percent less than the previous week and 24 percent more than the same period last year.

For the week ending November 7, 608 grain barges **moved down river**—14 barges more than the previous week. There were 949 grain barges **unloaded in New Orleans**, 32 percent higher than the previous week.

Ocean

For the week ending November 5, 35 **oceangoing grain vessels** were loaded in the Gulf—10 percent fewer than the same period last year. Within the next 10 days (starting November 6), 61 vessels were expected to be loaded—61 percent more than the same period last year.

As of November 5, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $42.25. This was 1 percent less than the previous week. The rate from the Pacific Northwest (PNW) to Japan was $23.25 per mt, 1 percent less than the previous week.

Fuel

For the week ending November 9, the U.S. average **diesel fuel price** increased 1.1 cents from the previous week to $2.383 per gallon, 69.0 cents below the same week last year.

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Feature Article/Calendar

Grain Transportation and Landed Costs to Mexico in Third Quarter 2020

Low U.S. transportation and landed costs improve the competitiveness of U.S. grain exports to neighboring Mexico—one of the largest and nearest importers of U.S. grain (corn, soybeans, and wheat) (***Grain Transportation Report* (*GTR*) tables 13, 14 and 15**). U.S. grain is transported to Mexico by one of two routes—either by cross-border land movements or by seaborne movements to Mexican ports for inland distribution. This article examines changing costs of transporting U.S. grain to Mexico over land to Guadalajara and by water to Veracruz. Changes are tracked from second quarter 2020 to third quarter 2020 (quarter to quarter) and from third quarter 2019 to third quarter 2020 (year to year).

Quarterly costs of transporting U.S. grain to Veracruz and Guadalajara, Mexico

	Water route (to Veracruz) $/metric ton					Land route (to Guadalajara) $/metric ton				
	2019 3rd qtr.	2020 2nd qtr.	2020 3rd qtr.	Percent change Yr. to yr.	Qtr. to qtr.	2019 3rd qtr.	2020 2nd qtr.	2020 3rd qtr.	Percent change Yr. to yr.	Qtr. to qtr.
Corn										
Origin			**IL**					**IA**		
Truck	9.18	9.70	12.38	34.9	27.6	4.72	3.83	3.93	-16.7	2.6
Rail [1]						95.44	94.48	94.63	-0.8	0.2
Barge[2]	23.89	14.53	21.58	-9.7	48.5					
Ocean[3]	15.50	12.41	14.39	-7.2	16.0					
Total transportation cost	48.57	36.64	48.35	-0.5	32.0	100.16	98.31	98.56	-1.6	0.3
Farm value[4]	155.50	126.11	128.34	-17.5	1.8	154.06	124.80	126.11	-18.1	1.0
Landed cost[5]	204.07	162.75	176.69	-13.4	8.6	254.22	223.11	224.67	-11.6	0.7
Transport % of landed cost	24	23	27			39	44	44		
Soybeans										
Origin			**IL**					**NE**		
Truck	9.18	9.70	12.38	34.9	27.6	4.72	3.83	3.93	-16.7	2.6
Rail						97.91	97.15	97.11	-0.8	0.0
Barge	23.89	14.53	21.58	-9.7	48.5					
Ocean	15.50	12.41	14.39	-7.2	16.0					
Total transportation cost	48.57	36.64	48.35	-0.5	32.0	102.63	100.98	101.04	-1.5	0.1
Farm value	317.10	309.87	331.06	4.4	6.8	293.83	295.05	312.81	6.5	6.0
Landed cost	365.67	346.51	379.41	3.8	9.5	396.46	396.03	413.85	4.4	4.5
Transport % of landed cost	13	11	13			26	25	24		
Wheat										
Origin			**KS**					**KS**		
Truck	4.72	3.83	3.93	-16.7	2.6	4.72	3.83	3.93	-16.7	2.6
Rail	43.31	43.31	42.07	-2.9	-2.9	83.12	81.10	81.17	-2.3	0.1
Ocean	15.50	12.41	14.39	-7.2	16.0					
Total transportation cost	63.53	59.55	60.39	-4.9	1.4	87.84	84.93	85.10	-3.1	0.2
Farm value	141.10	162.65	158.37	12.2	-2.6	141.10	162.65	158.37	12.2	-2.6
Landed cost	204.63	222.20	218.76	6.9	-1.5	228.94	247.58	243.47	6.3	-1.7
Transport % of landed cost	31	27	28			38	34	35		

[1]Rail rates include U.S. and Mexico portions of the movement. Mexico rail rates are estimated based on actual quoted market rates. BNSF and Union Pacific quoted rail tariff rates are through rates for shuttle trains. Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary market, which could exceed the rail tariff rate plus fuel surcharge shown in the table.
[2]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.
[3]Source for ocean freight rates: O'Neil Commodity Consulting.
[4]Source for farm values: USDA, National Agricultural Statistics Service.
[5]Landed cost is total transportation cost plus farm value.
Note: Total may not add exactly because of rounding.
Source: Compiled by the USDA, Agricultural Marketing Service.

Quarter-to-quarter transportation costs. Quarter to quarter, total transportation costs of shipping grain to Mexico through the water routes rose because of higher truck and ocean freight rates.[1] For the land routes, transportation costs did not change. While truck rates increased some, rail (public tariff) rates, which represent a large majority of the land route transportation costs, remained stable. Higher truck rates partly reflected more demand for truck services. Barge rates increased partly in response to strong barge demand for grain exports (see *GTR*, October 29, 2020). In addition, Mid-Mississippi barge rates, which are typically higher, replace Illinois barge rates in this article because several lock and dam facilities on the Illinois River were closed to perform repairs and rehabilitation (see *GTR*, July 2, 2020). Although navigation was still possible in some parts of the river, using Mid-Mississippi rates ensured

[1] Water routes typically involve truck transportation to barge to oceangoing vessel, or truck to rail to oceangoing vessel.

timeliness and consistency in calculating barge costs (see first Highlight *GTR*, July 16, 2020). Ocean freight rates increased because of strong bulk movements during the quarter (see *GTR*, October 15, 2020).

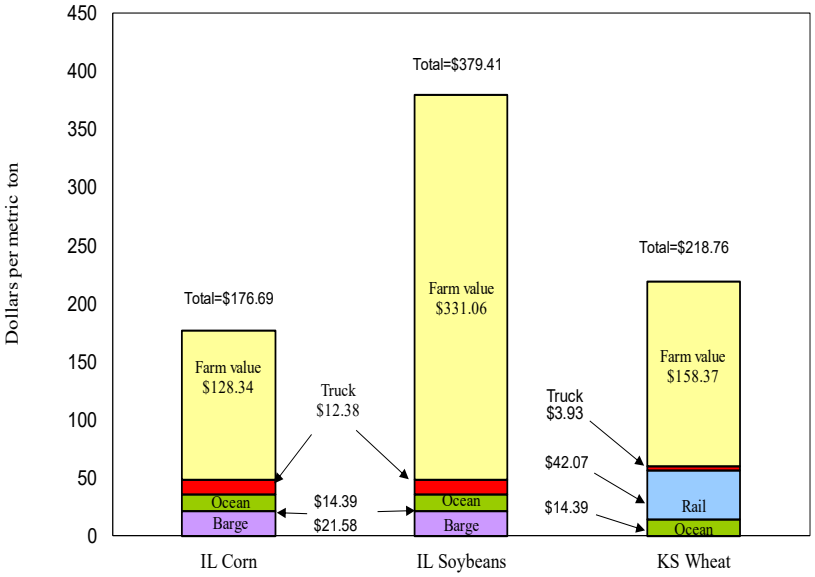
Year-to-year transportation costs. From year to year, total transportation costs of shipping grain to Mexico declined for both water and land routes. Land-route transportation costs fell because of reduced truck and rail rates. Truck rates also fell for waterborne wheat. For waterborne corn and soybeans, transportation costs fell because of reduced barge and ocean freight rates.

Quarter-to-quarter landed costs.[1] From quarter to quarter, landed costs increased for corn and soybeans shipped via both routes, but decreased for wheat shipped by both routes. For waterborne corn and soybeans, landed costs rose because of higher transport costs and higher farm values. For corn and soybeans via land routes, higher farm values were the major cause of higher landed costs. For wheat (by both routes), lower farm values more than offset higher transport costs, causing landed costs to fall.

Third-quarter 2020 landed costs for waterborne grain movements ranged from $177 per metric ton (mt) to $379 per mt (see table and fig. 1). For land-based grain movements, landed costs ranged from $225 per mt to $414 per mt (see table and fig. 2). The transportation share of landed costs ranged from 13 percent to 28 percent for the water routes and from 24 percent to 44 percent for the land routes (see table). Quarter to quarter, the change in transportation share of landed costs varied for corn and soybeans but increased for wheat.

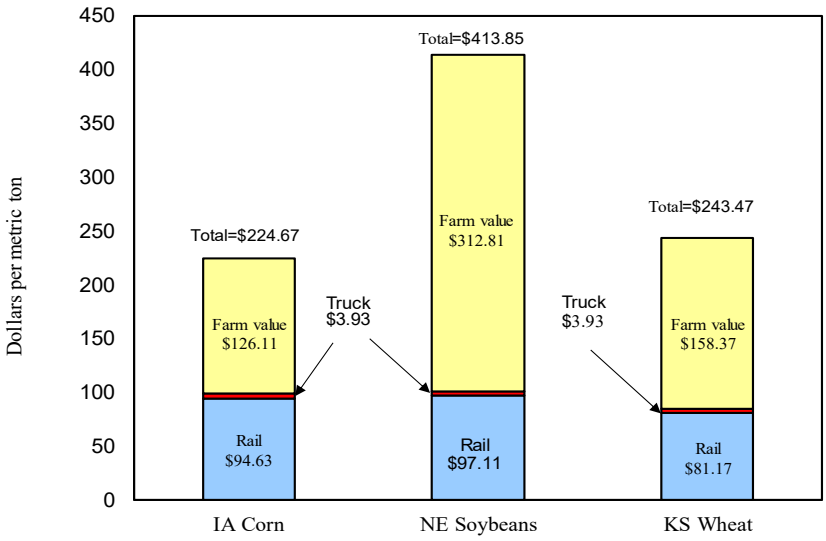
Year-to-year landed costs. From year to year, landed costs decreased for corn, but rose for soybeans and wheat transported to Mexico. Corn farm values fell from year to year, but the farm values rose for both soybeans and wheat.

Figure 1. Second-quarter water-route landed costs to Veracruz, Mexico



Note: IL = Illinois; KS = Kansas.
Source: USDA, Agricultural Marketing Service.

Figure 2. Second-quarter land-route landed costs to Guadalajara, Mexico



Note: IA = Iowa; NE = Nebraska; KS = Kansas.
Source: USDA, Agricultural Marketing Service.

U.S. Export to Mexico: According to data from USDA's Federal Grain Inspection Service, Mexico imported 3.24 million metric tons (mmt) of U.S. corn, 1.04 mmt of U.S. soybeans, and 0.72 mmt of U.S. wheat in third quarter 2020. Quarter to quarter, these imports amounted to 18 percent less corn, but 15 percent more soybeans and 3 percent more wheat. However, year to year, U.S. inspections for export to Mexico rose by 2 percent for corn, while inspections fell 20 percent for soybeans and 23 percent for wheat. *surajudeen.olowolayemo@usda.gov*

[1] Landed costs include the cost of the good (farm value) and the cost to receive it (transportation costs).

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit train	Shuttle		Gulf	Pacific
11/11/20	160	288	236	369	189	165
11/04/20	159	288	241	331	190	167

[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)

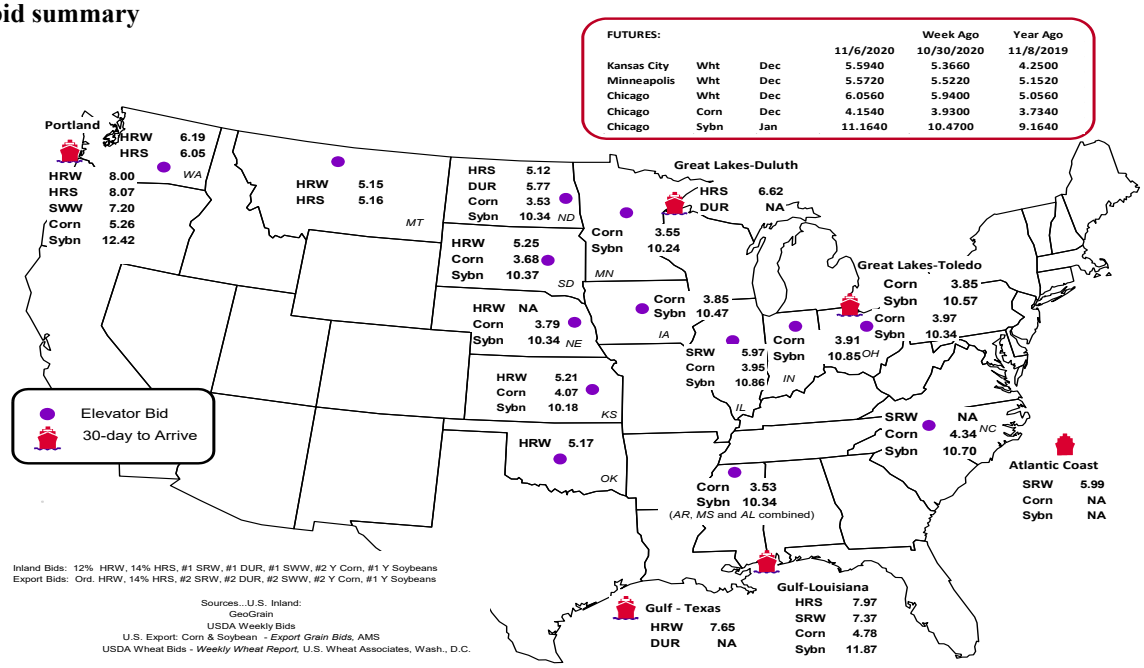
Commodity	Origin–destination	11/6/2020	10/30/2020
Corn	IL–Gulf	-0.83	-0.97
Corn	NE–Gulf	-0.99	-1.14
Soybean	IA–Gulf	-1.40	-1.51
HRW	KS–Gulf	-2.44	-2.44
HRS	ND–Portland	-2.95	-2.90

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]
11/04/2020[p]	1,918	1,786	9,539	795	14,038	10/31/2020	2,236
10/28/2020[r]	2,026	2,206	7,900	821	12,953	10/24/2020	1,697
2020 YTD[r]	30,943	48,075	236,786	12,205	328,009	2020 YTD	106,956
2019 YTD[r]	37,734	47,331	218,088	15,167	318,320	2019 YTD	107,861
2020 YTD as % of 2019 YTD	82	102	109	80	103	% change YTD	99
Last 4 weeks as % of 2019[2]	403	336	172	248	207	Last 4wks. % 2019	84
Last 4 weeks as % of 4-year avg.[2]	166	225	141	86	147	Last 4wks. % 4 yr.	89
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.

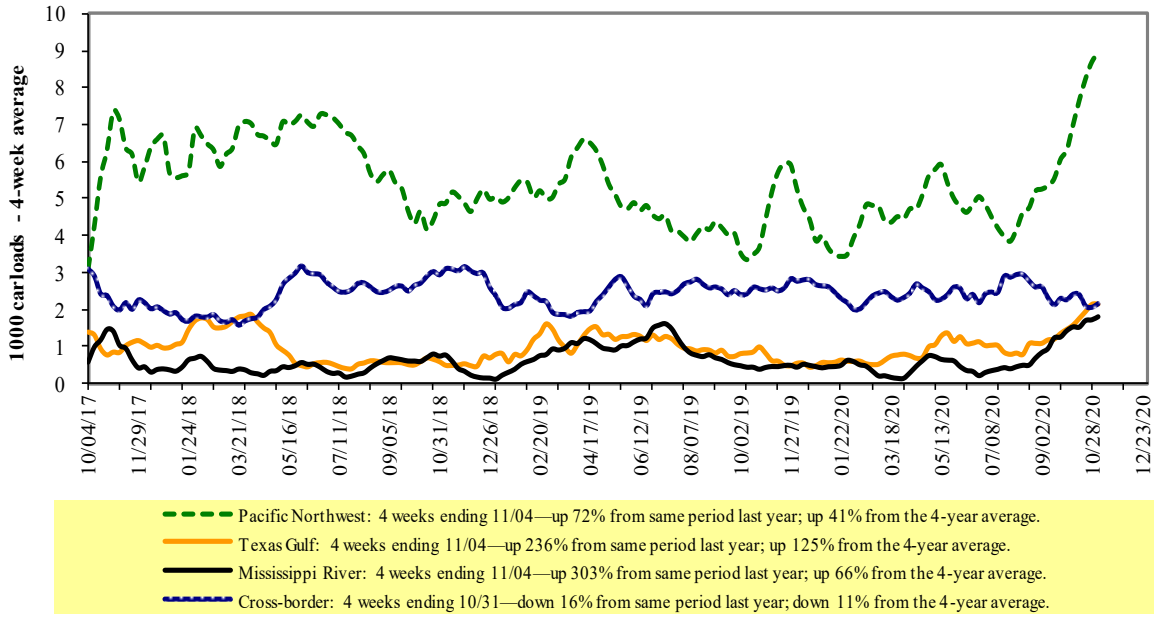
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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	
10/31/2020	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,903	2,767	14,125	1,421	6,786	27,002	5,823	6,054
This week last year	1,647	2,314	11,473	1,454	4,909	21,797	4,544	5,644
2020 YTD	73,343	105,709	492,291	47,844	235,920	955,107	189,777	208,282
2019 YTD	79,495	117,332	478,199	49,876	222,919	947,821	179,030	196,706
2020 YTD as % of 2019 YTD	92	90	103	96	106	101	106	106
Last 4 weeks as % of 2019*	113	132	121	118	138	126	134	116
Last 4 weeks as % of 3-yr. avg.**	97	115	118	120	135	120	131	111
Total 2019	91,611	136,948	568,369	58,527	260,269	1,115,724	212,475	235,892

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

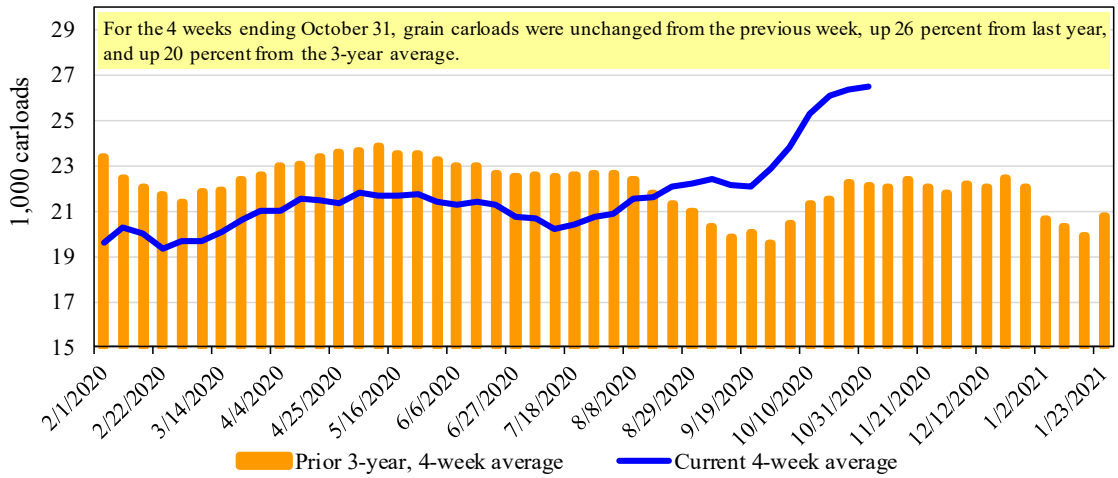
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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							
11/5/2020		Nov-20	Nov-19	Dec-20	Dec-19	Jan-21	Jan-20	Feb-21	Feb-20
BNSF[3]	COT grain units	no bids	0	no bids	0	9	2	0	0
	COT grain single-car	0	0	0	0	17	2	0	2
UP[4]	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no bid	no offer	no bid	no offer	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.

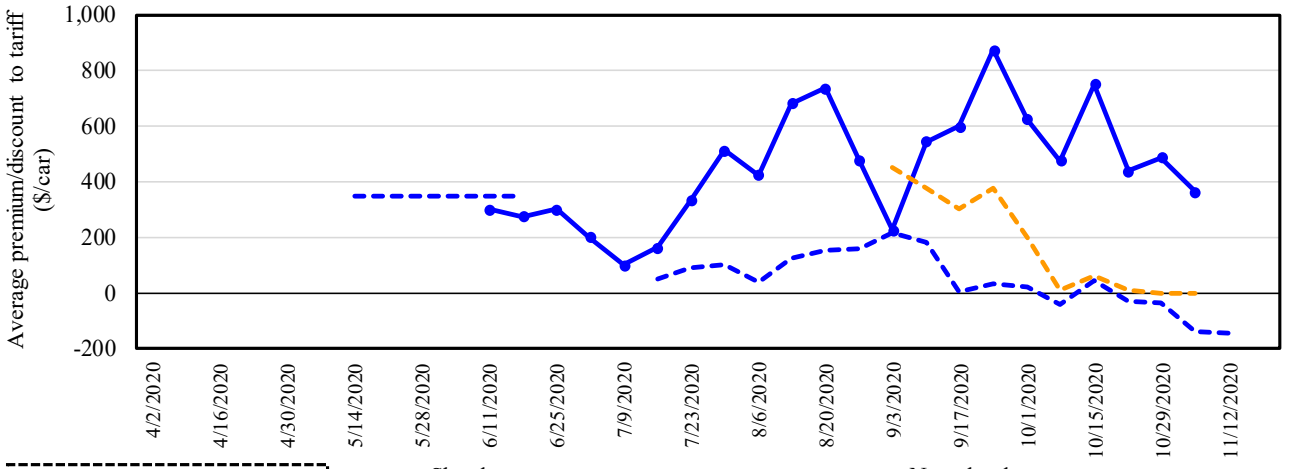
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 November 2020, secondary market

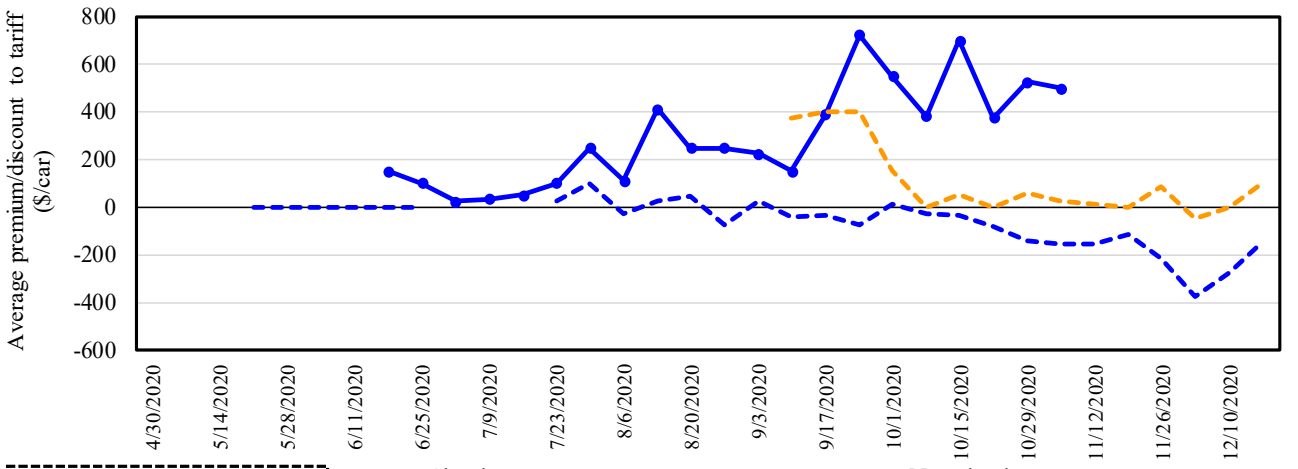


11/5/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$467	$263

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $123 this week and are $510 below the peak.

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service.

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



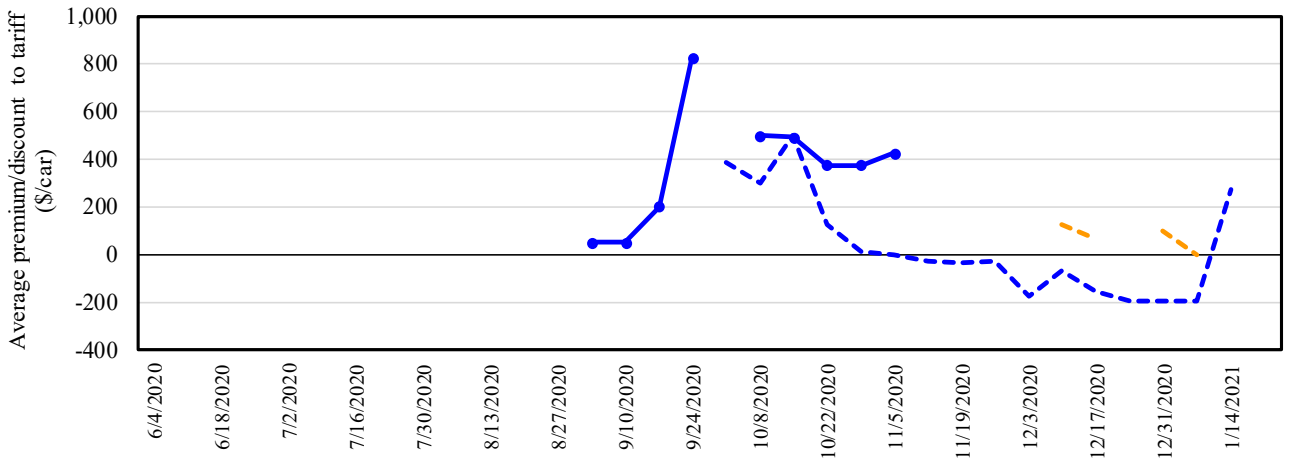
11/5/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$600	$400

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $25 this week and are $225 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 January 2021, secondary market



11/5/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	n/a	$425

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $50 this week and are $400 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.

Table 6

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

	For the week ending: 11/5/2020	Delivery period					
		Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21
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**	**467**	**600**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(208)	(100)	n/a	n/a	n/a	n/a
	Change from same week 2019	179	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**263**	**400**	**425**	**300**	**200**	**n/a**
	Change from last week	(37)	50	50	n/a	125	n/a
	Change from same week 2019	413	525	n/a	n/a	n/a	n/a

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

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

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

Source: USDA, Agricultural Marketing Service.

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

Table 7

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

November 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	$35	$39.90	$1.09	-1
	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	-2
	Amarillo, TX	Los Angeles, CA	$5,121	$95	$51.80	$1.41	-3
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,900	$70	$39.43	$1.00	-3
	Toledo, OH	Raleigh, NC	$7,833	$0	$77.79	$1.98	15
	Des Moines, IA	Davenport, IA	$2,455	$15	$24.53	$0.62	1
	Indianapolis, IN	Atlanta, GA	$5,979	$0	$59.37	$1.51	3
	Indianapolis, IN	Knoxville, TN	$5,040	$0	$50.05	$1.27	3
	Des Moines, IA	Little Rock, AR	$3,900	$44	$39.16	$0.99	1
	Des Moines, IA	Los Angeles, CA	$5,780	$128	$58.67	$1.49	-2
Soybeans	Minneapolis, MN	New Orleans, LA	$3,631	$30	$36.35	$0.99	-4
	Toledo, OH	Huntsville, AL	$6,595	$0	$65.49	$1.78	17
	Indianapolis, IN	Raleigh, NC	$7,125	$0	$70.75	$1.93	3
	Indianapolis, IN	Huntsville, AL	$5,247	$0	$52.11	$1.42	3
	Champaign-Urbana, IL	New Orleans, LA	$4,645	$70	$46.83	$1.27	-2
Shuttle train							
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	$6,376	$0	$63.32	$1.72	-10
	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	-3
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	0
	Des Moines, IA	Amarillo, TX	$4,320	$55	$43.45	$1.10	0
	Minneapolis, MN	Tacoma, WA	$5,180	$0	$51.44	$1.31	0
	Council Bluffs, IA	Stockton, CA	$5,100	$0	$50.65	$1.29	2
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,850	$0	$58.09	$1.58	0
	Minneapolis, MN	Portland, OR	$5,900	$0	$58.59	$1.59	0
	Fargo, ND	Tacoma, WA	$5,750	$0	$57.10	$1.55	0
	Council Bluffs, IA	New Orleans, LA	$4,875	$81	$49.22	$1.34	-3
	Toledo, OH	Huntsville, AL	$4,945	$0	$49.11	$1.34	3
	Grand Island, NE	Portland, OR	$5,260	$115	$53.37	$1.45	-13

[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: November 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	$7,384	$0	$75.45	$2.05	-2
	OK	Cuautitlan, EM	$6,713	$49	$69.08	$1.88	-2
	KS	Guadalajara, JA	$7,471	$363	$80.05	$2.18	-4
	TX	Salinas Victoria, NL	$4,347	$28	$44.71	$1.22	-1
Corn	IA	Guadalajara, JA	$8,902	$295	$93.97	$2.38	-2
	SD	Celaya, GJ	$8,140	$0	$83.17	$2.11	0
	NE	Queretaro, QA	$8,300	$92	$85.75	$2.18	-2
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,665	$89	$79.23	$2.01	-2
	SD	Torreon, CU	$7,690	$0	$78.57	$1.99	0
Soybeans	MO	Bojay (Tula), HG	$8,547	$278	$90.16	$2.45	-2
	NE	Guadalajara, JA	$9,157	$286	$96.48	$2.62	-2
	IA	El Castillo, JA	$9,410	$0	$96.15	$2.61	-1
	KS	Torreon, CU	$8,014	$191	$83.83	$2.28	-1
Sorghum	NE	Celaya, GJ	$7,772	$255	$82.02	$2.08	-2
	KS	Queretaro, QA	$8,108	$61	$83.46	$2.12	-1
	NE	Salinas Victoria, NL	$6,713	$49	$69.09	$1.75	-1
	NE	Torreon, CU	$7,092	$169	$74.19	$1.88	-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.

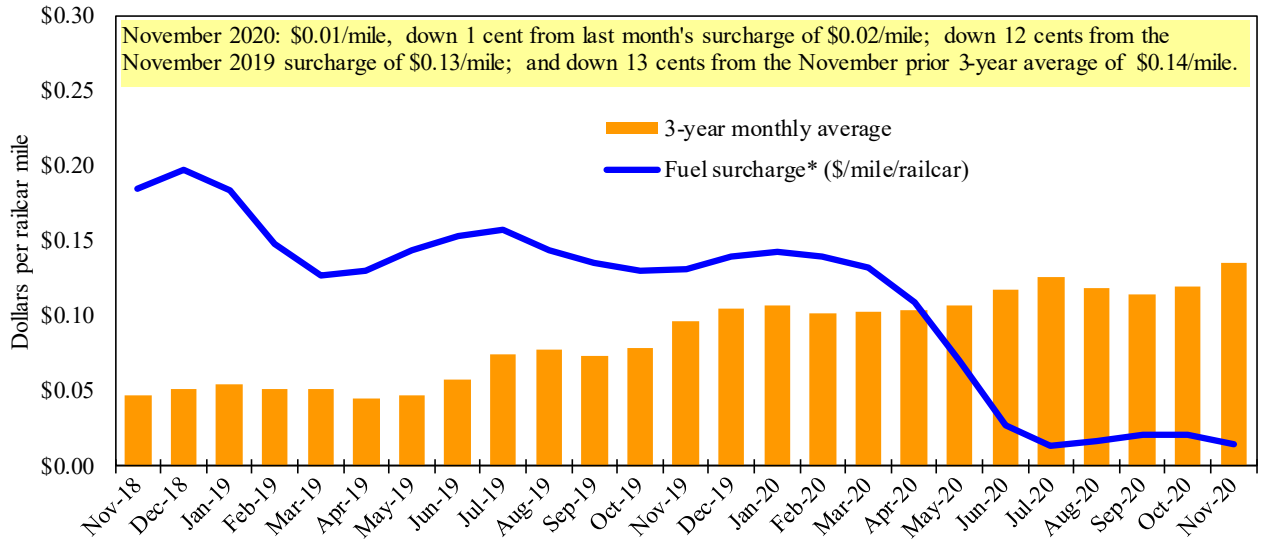
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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.

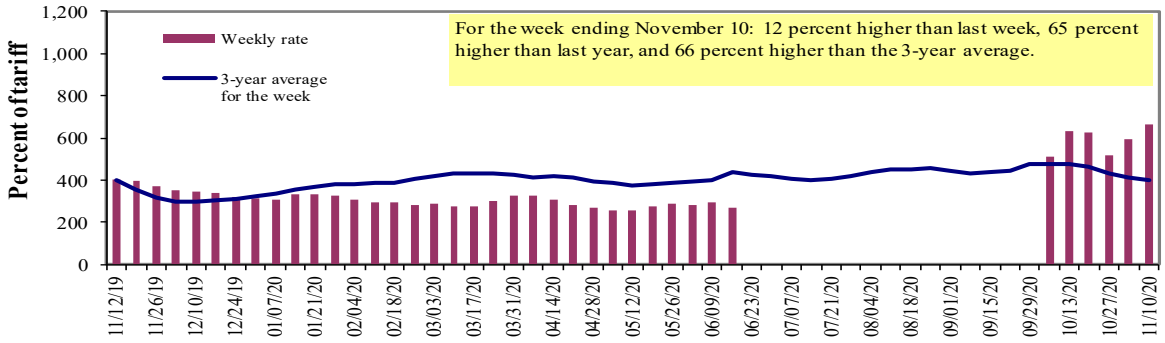
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

**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 8
Illinois River barge freight rate[1,2,3]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.
[3]No rates data from 06/23/20 to 9/29/20 due to the lock closure for rehabilitation and replacement of lock machinery.
Source: USDA, Agricultural Marketing Service.

Table 9
Weekly barge freight rates: Southbound only

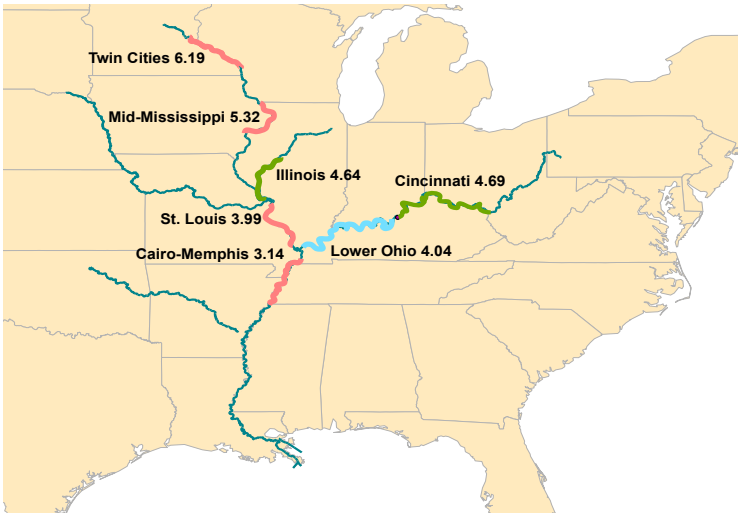
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	11/10/2020	665	690	665	672	737	737	680
	11/3/2020	673	617	596	479	575	575	492
$/ton	11/10/2020	41.16	36.71	30.86	26.81	34.57	29.77	21.35
	11/3/2020	41.66	32.82	27.65	19.11	26.97	23.23	15.45
Current week % change from the same week:								
	Last year	62	67	65	148	177	177	182
	3-year avg. [2]	56	70	66	124	103	103	152
Rate[1]	December	-	-	465	395	412	412	360
	February	-	-	467	340	355	355	320

[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

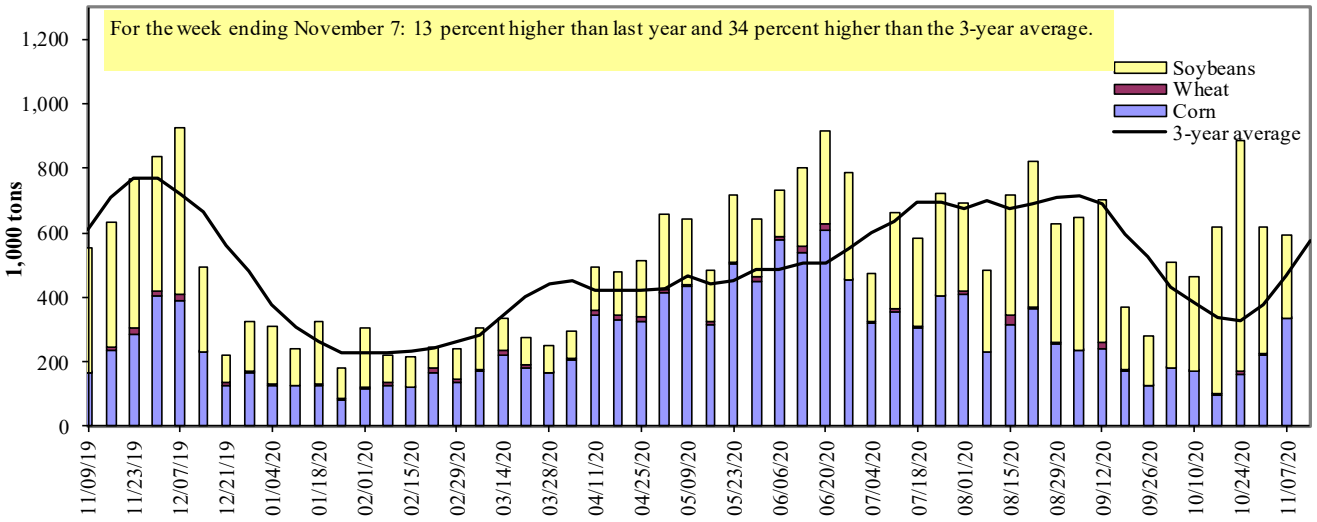
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 11/07/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	108	3	205	0	316
Winfield, MO (L25)	246	2	262	0	510
Alton, IL (L26)	266	2	221	10	499
Granite City, IL (L27)	335	2	255	30	622
Illinois River (La Grange)	111	0	19	0	130
Ohio River (Olmsted)	135	4	105	0	244
Arkansas River (L1)	0	4	56	0	60
Weekly total - 2020	470	9	416	30	926
Weekly total - 2019	228	8	508	2	745
2020 YTD[1]	15,684	1,642	14,468	203	31,997
2019 YTD[1]	10,581	1,440	11,337	138	23,495
2020 as % of 2019 YTD	148	114	128	147	136
Last 4 weeks as % of 2019[2]	171	93	179	2,298	176
Total 2019	12,780	1,631	14,683	154	29,247

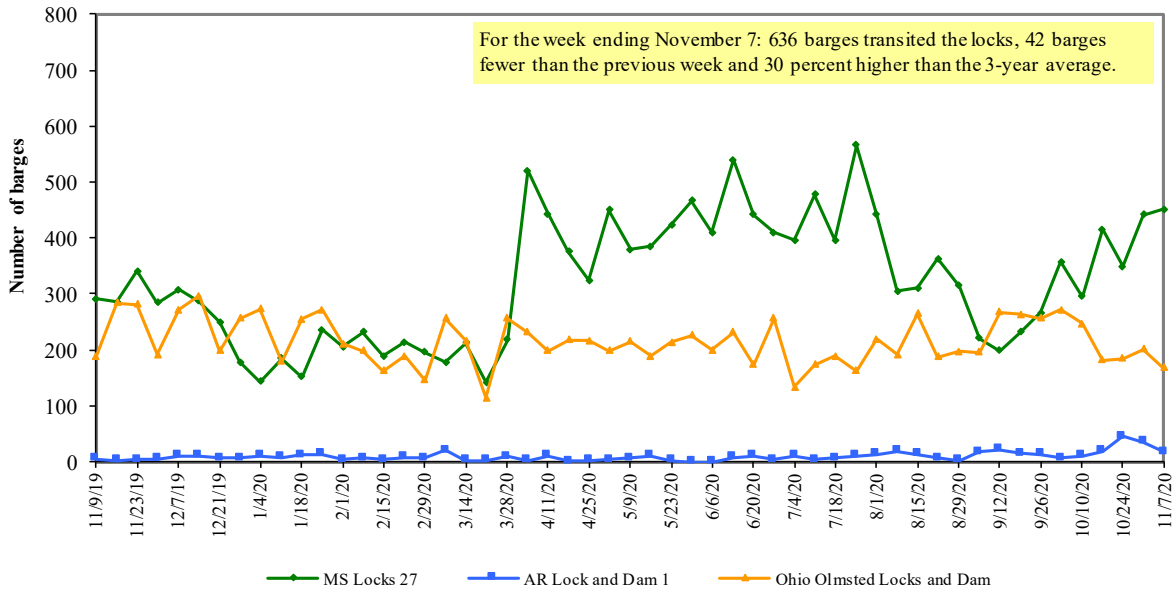
[1] Weekly total, YTD (year-to-date), and calendar year total include MS/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. L (as in "L15") refers to a lock or lock and dam facility. Olmsted = Olmsted Locks and Dam. La Grange = La Grange Lock and Dam.

[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

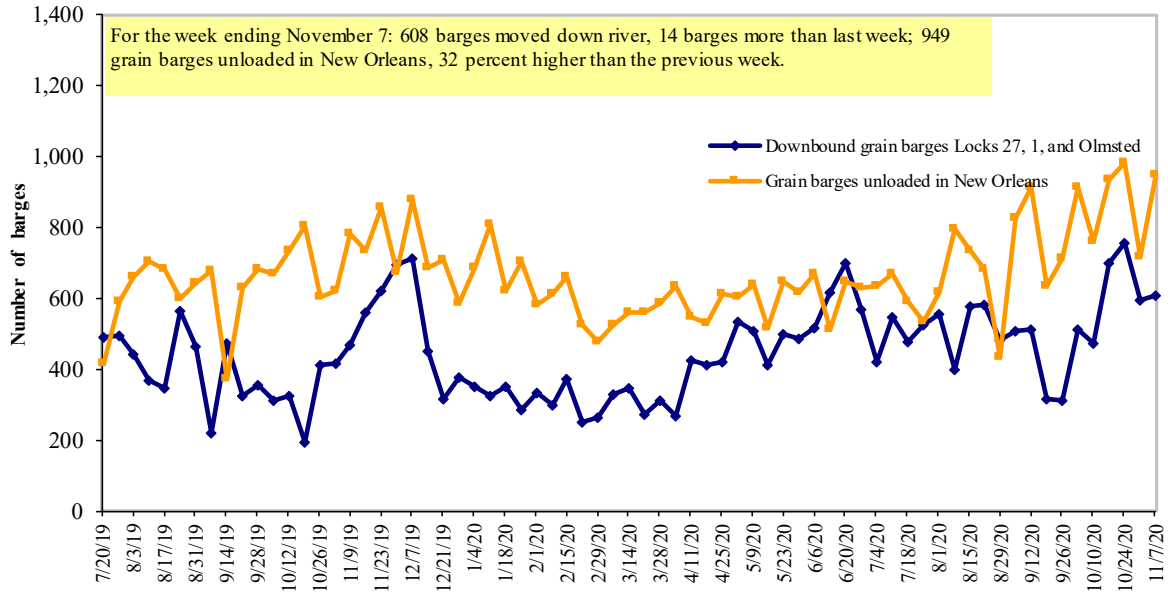
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 11/9/2020 (U.S. $/gallon)

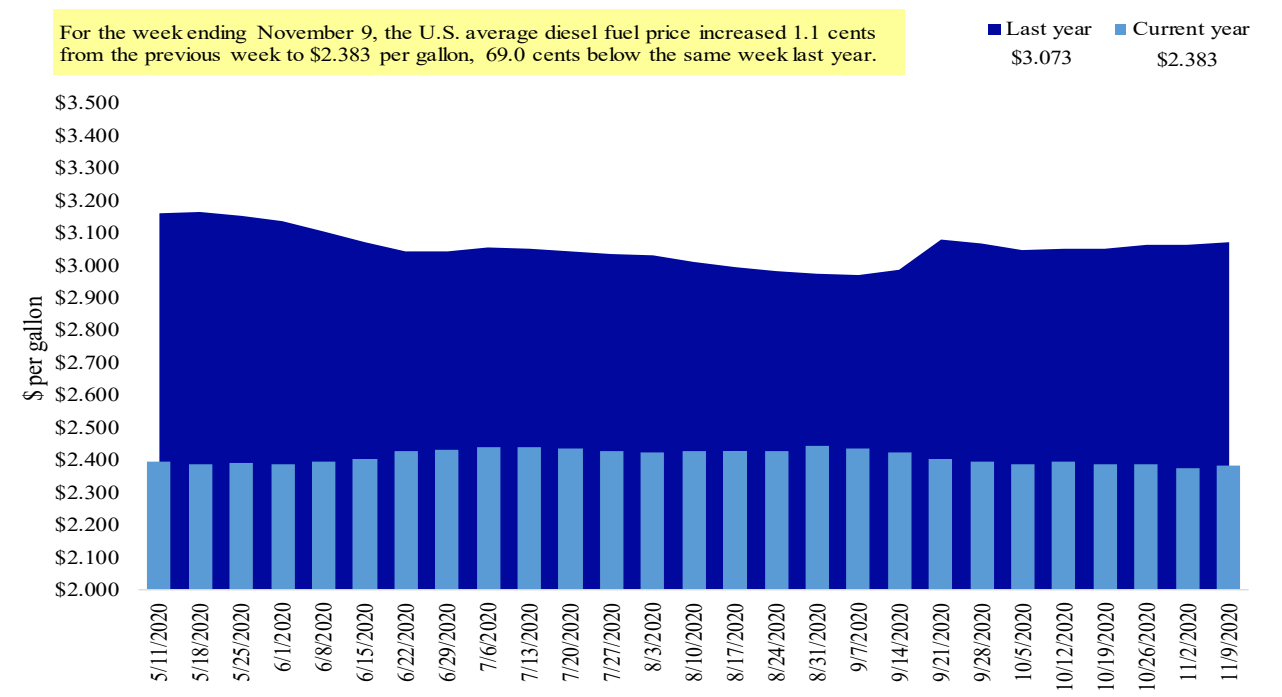
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.450	0.006	-0.600
	New England	2.554	-0.002	-0.488
	Central Atlantic	2.645	-0.001	-0.600
	Lower Atlantic	2.296	0.012	-0.623
II	Midwest	2.261	0.015	-0.711
III	Gulf Coast	2.132	0.001	-0.663
IV	Rocky Mountain	2.372	0.048	-0.831
V	West Coast	2.937	0.017	-0.821
	West Coast less California	2.572	0.031	-0.863
	California	3.237	0.006	-0.777
Total	United States	2.383	0.011	-0.690

[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]									
10/29/2020	1,633	419	1,617	1,936	201	5,806	26,335	31,853	63,994
This week year ago	1,126	580	1,233	921	313	4,173	7,954	11,565	23,691
Cumulative exports-marketing year[2]									
2020/21 YTD	4,484	938	3,109	2,081	340	10,951	6,854	16,648	34,453
2019/20 YTD	4,351	1,253	2,879	1,925	358	10,766	3,939	9,334	24,039
YTD 2020/21 as % of 2019/20	103	75	108	108	95	102	174	178	143
Last 4 wks. as % of same period 2019/20*	141	66	126	181	67	129	301	287	264
Total 2019/20	9,526	2,318	6,960	4,751	922	24,477	42,622	43,994	111,094
Total 2018/19	8,591	3,204	6,776	5,164	479	24,214	48,924	46,189	119,327

[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 10/29/2020	Total commitments[2]		% change	Exports[3]
	2020/21 current MY	2019/20 last MY	current MY from last MY	3-yr. avg. 2017-19
		- 1,000 mt -		
Mexico	6,819	6,296	8	14,869
Japan	4,501	1,612	179	11,221
Columbia	1,572	578	172	4,830
Korea	472	73	550	4,011
China	10,763	60	17,899	909
Top 5 importers	**24,127**	**8,619**	**180**	**35,840**
Total U.S. corn export sales	**33,189**	**11,893**	**179**	**49,983**
% of projected exports	49%	26%		
Change from prior week[2]	**2,611**	**488**		
Top 5 importers' share of U.S. corn export sales	73%	72%		72%
USDA forecast November 2020	**67,430**	**45,242**	**49**	
Corn use for ethanol USDA forecast, November 2020	**128,270**	**123,241**	**4**	

[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 10/29/2020	Total commitments[2] 2020/21 current MY	2019/20 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2017-19
		- 1,000 mt -		- 1,000 mt -
China	26,807	7,146	275	19,106
Mexico	2,701	2,605	4	4,591
Egypt	1,316	805	64	2,980
Indonesia	743	536	39	2,360
Japan	774	861	(10)	2,288
Top 5 importers	**32,340**	**11,953**	**171**	**31,324**
Total U.S. soybean export sales	**48,501**	**20,898**	**132**	**49,352**
% of projected exports	81%	46%		
change from prior week[2]	**1,531**	**1,750**		
Top 5 importers' share of U.S. soybean export sales	67%	57%		**63%**
USDA forecast, November 2020	**59,946**	**45,668**	**131**	

[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 10/29/2020	Total commitments[2] 2020/21 current MY	2019/20 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2017-19
		1,000 mt -		- 1,000 mt -
Mexico	2,266	2,256	0	3,213
Philippines	2,347	1,791	31	2,888
Japan	1,515	1,546	(2)	2,655
Nigeria	791	918	(14)	1,433
Korea	1,139	865	32	1,372
Indonesia	610	335	82	1,195
Taiwan	766	766	(0)	1,175
Thailand	495	463	7	727
Italy	481	539	(11)	622
Colombia	259	467	(44)	618
Top 10 importers	**10,669**	**9,944**	7	**15,897**
Total U.S. wheat export sales	**16,757**	**14,939**	12	**23,821**
% of projected exports	63%	57%		
change from prior week[2]	**597**	**361**		
Top 10 importers' share of U.S. wheat export sales	64%	67%		67%
USDA forecast, November 2020	**26,567**	**26,294**	1	

[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 11/05/20	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	246	163	151	13,732	12,134	113	66	92	13,961
Corn	65	131	50	8,453	6,922	122	n/a	53	7,047
Soybeans	990	708	140	9,505	9,315	102	230	191	11,969
Total	**1,301**	**1,001**	**130**	**31,689**	**28,371**	**112**	**165**	**147**	**32,977**
Mississippi Gulf									
Wheat	7	40	17	3,239	4,090	79	43	42	4,448
Corn	471	429	110	24,589	18,540	133	178	132	20,763
Soybeans	1,119	1,160	96	26,304	24,887	106	131	122	31,398
Total	**1,597**	**1,629**	**98**	**54,132**	**47,517**	**114**	**138**	**122**	**56,609**
Texas Gulf									
Wheat	16	76	21	3,974	5,659	70	59	71	6,009
Corn	29	0	n/a	650	579	112	n/a	133	640
Soybeans	115	215	53	1,159	2	n/a	n/a	n/a	2
Total	**160**	**291**	**55**	**5,783**	**6,240**	**93**	**232**	**224**	**6,650**
Interior									
Wheat	51	36	141	1,843	1,670	110	107	152	1,987
Corn	112	160	70	7,313	6,624	110	102	102	7,857
Soybeans	199	218	91	5,919	6,093	97	122	113	7,043
Total	**362**	**415**	**87**	**15,075**	**14,387**	**105**	**112**	**111**	**16,887**
Great Lakes									
Wheat	0	11	0	709	1,000	71	26	41	1,339
Corn	0	7	0	61	11	538	64	43	11
Soybeans	127	35	363	685	473	145	n/a	161	493
Total	**127**	**53**	**238**	**1,456**	**1,485**	**98**	**287**	**124**	**1,844**
Atlantic									
Wheat	0	3	0	34	37	92	n/a	n/a	37
Corn	0	0	n/a	33	99	33	513	84	99
Soybeans	69	136	51	1,068	1,150	93	220	145	1,353
Total	**69**	**138**	**50**	**1,136**	**1,286**	**88**	**227**	**145**	**1,489**
U.S. total from ports*									
Wheat	320	330	97	23,531	24,592	96	64	83	27,781
Corn	678	728	93	41,099	32,775	125	165	113	36,417
Soybeans	2,618	2,472	106	44,640	41,921	106	173	150	52,258
Total	**3,616**	**3,529**	**102**	**109,270**	**99,288**	**110**	**149**	**132**	**116,457**

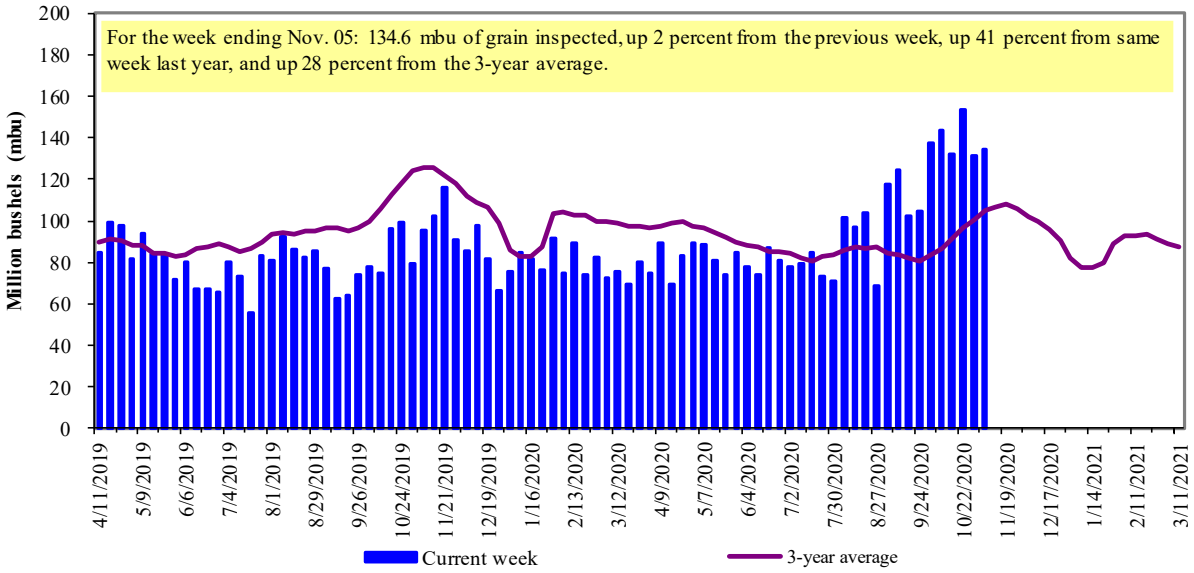
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

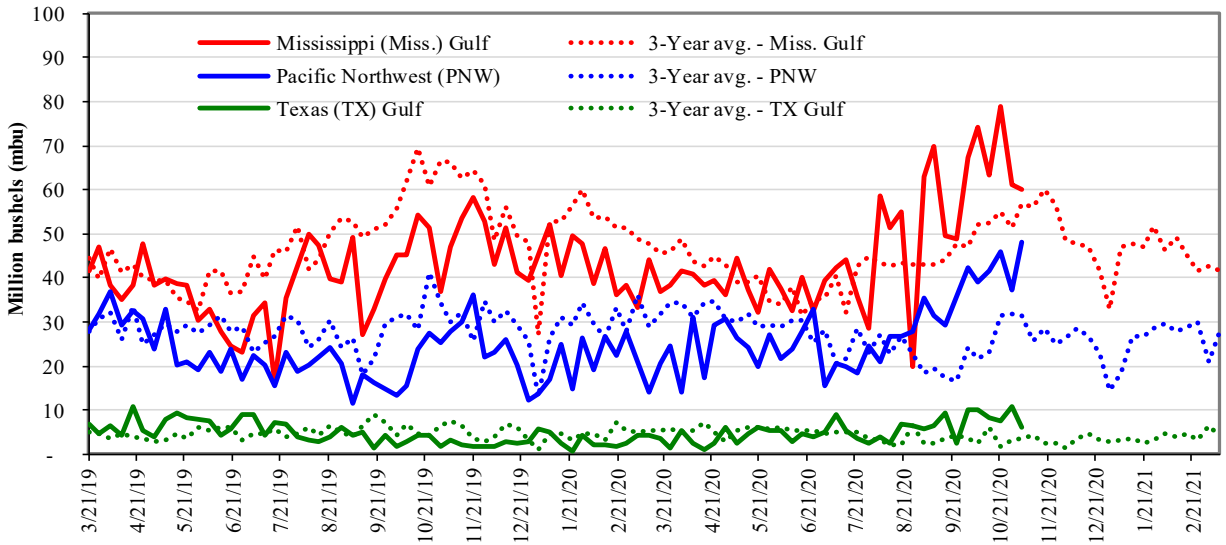


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 11/05/20 inspections (mbu):	
MS Gulf:	59.9
PNW:	48.0
TX Gulf:	5.9

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	down 2	down 44	down 8	up 29
Last Year (same wk):	up 27	up 78	up 31	up 73
3-yr avg. (4-wk. mov. Avg):	up 11	up 64	up 14	up 63

Source: USDA, Federal Grain Inspection Service.

Table 17

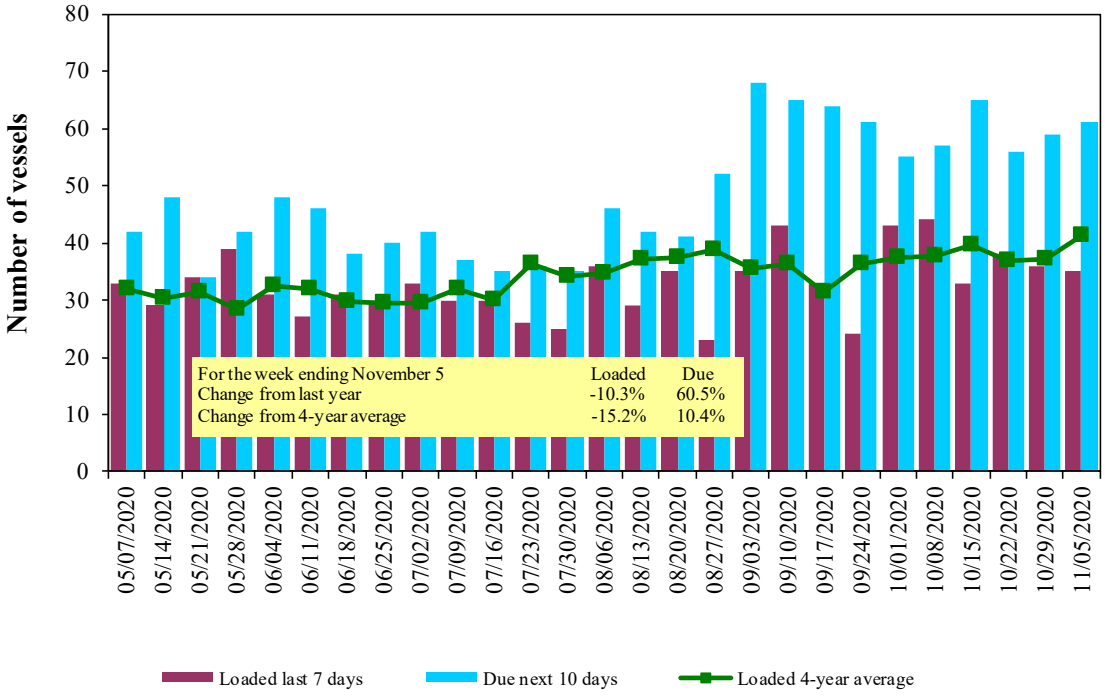
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
11/5/2020	50	35	61	12
10/29/2020	46	36	59	19
2019 range	(26…61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service.

Figure 16

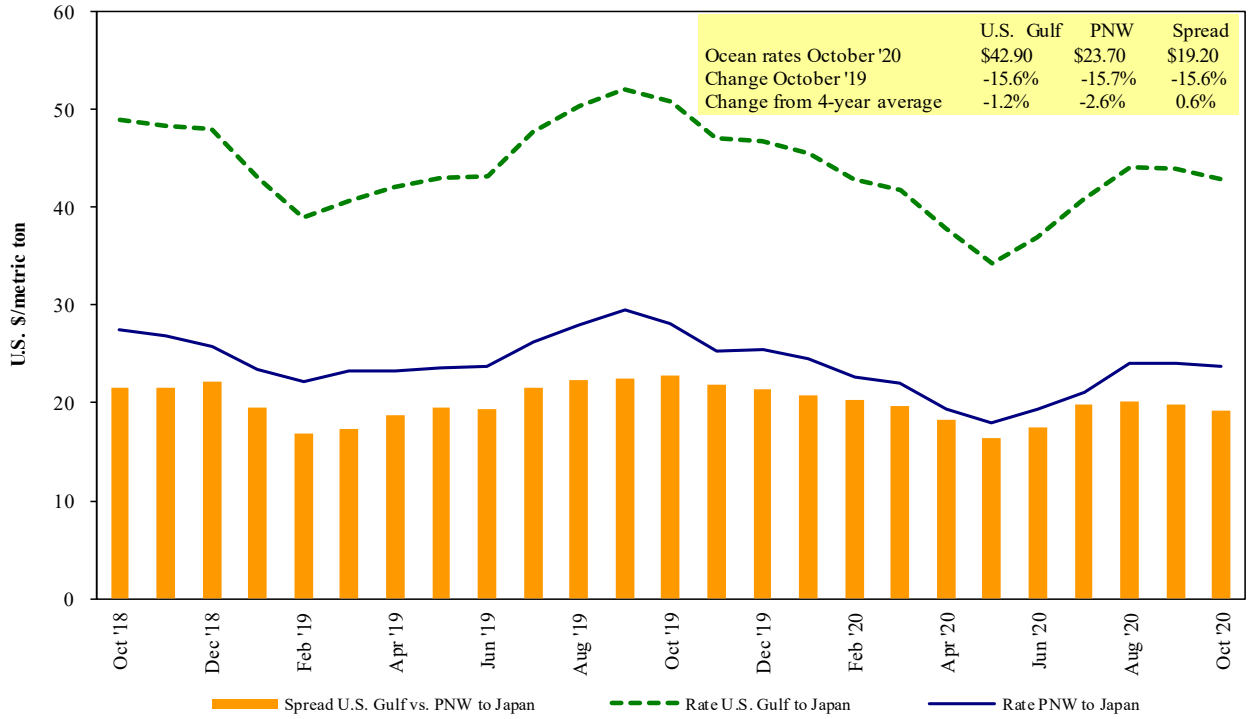
U.S. Gulf[1] vessel loading activity



[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 11/07/2020

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy grain	Nov 20/30	65,000	37.25
U.S. Gulf	China	Heavy grain	Oct 16/25	66,000	41.75
U.S. Gulf	China	Heavy grain	Aug 18/24	66,000	39.50
U.S. Gulf	Djibouti	Wheat	Oct 16/26	12,180	94.48*
U.S. Gulf	Djibouti	Wheat	Sep 18/28	15,810	54.86*
U.S. Gulf	Cameroon	Sorghum	Oct 10/20	8,580	68.50*
U.S. Gulf	Mozambique	Sorghum	Aug 10/20	30,780	41.35
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	Indonesia	Soybean Meal	Nov 10/20	8,600	37.86*
PNW	Yemen	Wheat	Aug 4/14	15,000	42.95*
Vancouver	Japan	Wheat	Sep 15/30	20,000	24.30
Vancouver	Japan	Canola	Sep 15/30	30,000	24.30
Brazil	Japan	Corn	Sep 11/20	49,000	34.75
Brazil	Japan	Corn	Sep 1/10	60,000	34.00

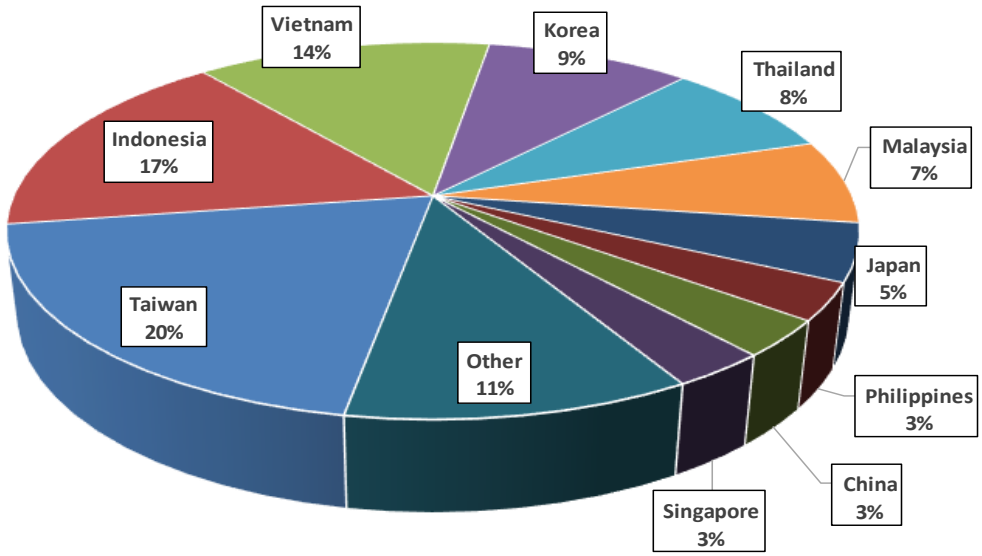
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

Source: Maritime Research, Inc.

In 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.

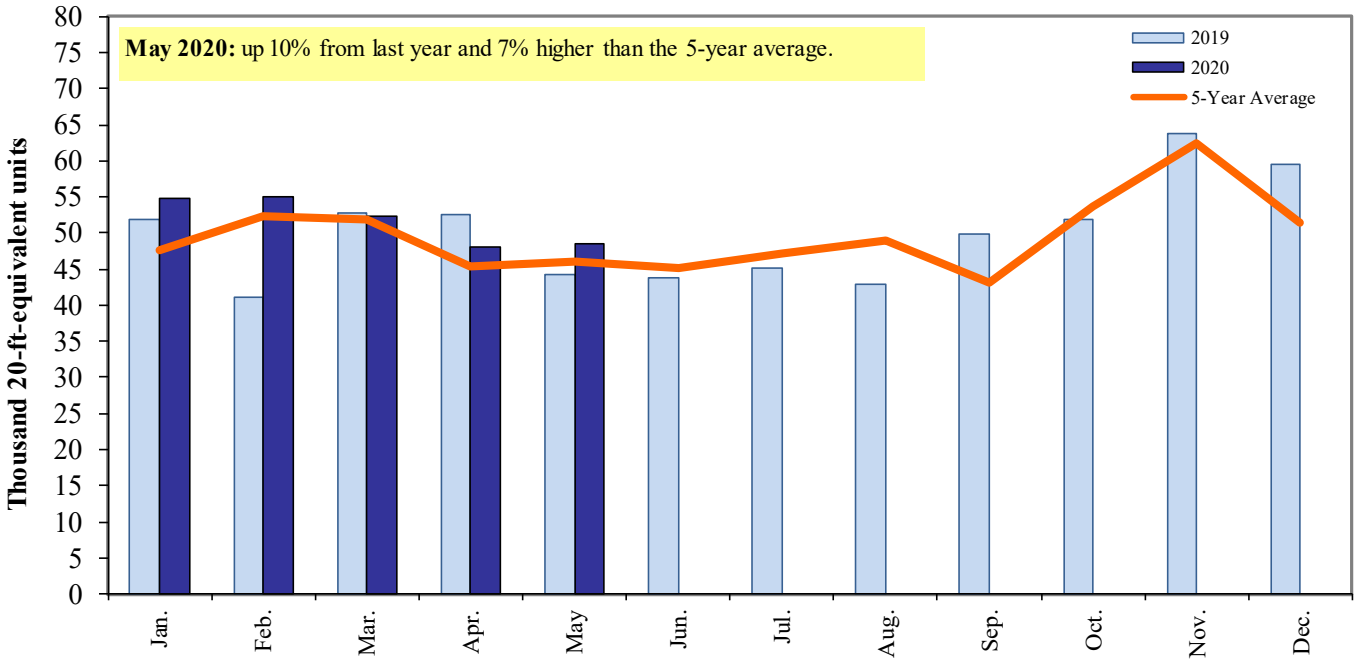
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-May 2020



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, 120100, 120190, 120810, 230210, 230310, 230330, and 230990.

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

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